Museum of Vertebrate Zoology

Purchasing Miscellaneous Goods

This document outlines the process for purchasing miscellaneous goods not found in the BearBuy Catalog from off-campus suppliers (e.g field or research supplies, software, publication fees). It was created to be used as a reference for researchers within the Museum of Vertebrate Zoology, UC Berkeley. The process in brief:

1. Vendoring - Be sure the supplier is in the UC Berkeley system, if not add vendor
2. Non-Catalog Form in BearBuy to create a PO *BEFORE* goods are ordered
3. Submit Invoice for payment after goods are received

Once your order is in BearBuy you can track the status if your order. See "How to Find the Status of your Order": https://supplychain.berkeley.edu/procurement/how-find-status-your-order

Vendoring

Information about Vendoring can be found here: https://supplychain.berkeley.edu/vendoring

Check to see if supplier is in the UC Berkeley system

- Log into BearBuy (https:/bearbuy.is.berkeley.edu) and follow these instructions: https://supplychain.berkeley.edu/sites/default/files/searching_viewing_supplier_profiles_in_bearbuy_062017.pdf
- Note that suppliers may have different official names for vendoring purposes. For example: Argonne National Laboratory is part of University of Chicago, so you would search for "University of Chicago" and NOT "Argonne National Laboratory"
- If the vendor is not active or not in the system, see below

Reactivating a Supplier

- See "Reactivate a supplier": https://supplychain.berkeley.edu/vendoring/how

Adding a Vendor

See "New supplier": https://supplychain.berkeley.edu/vendoring/how

- Send Vendor form AND Conflict of Interest form to the supplier and have them return to you
    - Vendor form: https://supplychain.berkeley.edu/sites/default/files/ucb_substitute_w-9_and_supplier_information_form_01062015.pdf
    - Conflict of Interest form: https://supplychain.berkeley.edu/sites/default/files/conflict_of_interest_11-16-2018.docx
    - You complete section 2 of Vendor Form and make sure the field "DESCRIPTION OF BUSINESS OR SERVICE PROVIDING TO UC BERKELEY" is completed in section 1 (e.g. select "Other" and note "Lab Services")
- Fax forms together to campus vendoring as directed on vendor form
    - Best Practice: be sure to include a cover page (on clipboard above machine in front office), and request a confirmation report be printed by the front office fax machine

Create a PO – Non-Catalog Form

To request a PO you will need:

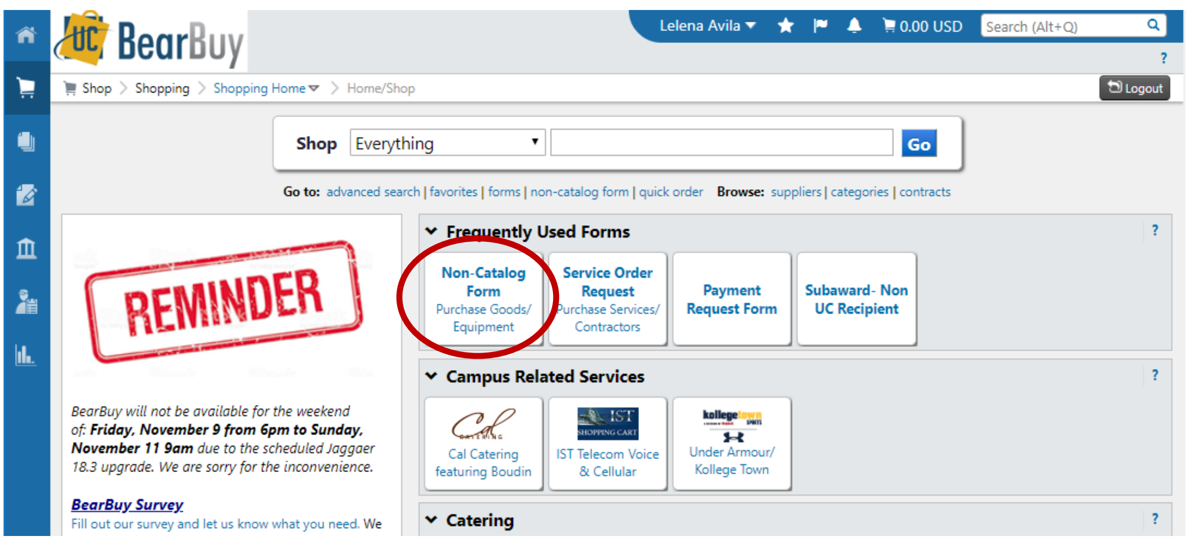
1. Cost estimate or quote for goods
2. Contract requiring signature (if required by supplier)
3. Proof of liability insurance from the supplier (if services are provided with goods)
4. UCOP Source Selection & Price Reasonableness Justification Form (or all Federally Funded purchases ≥$10,000 and Non-Federally Funded purchases ≥$50,000)

Non-Catalog Form

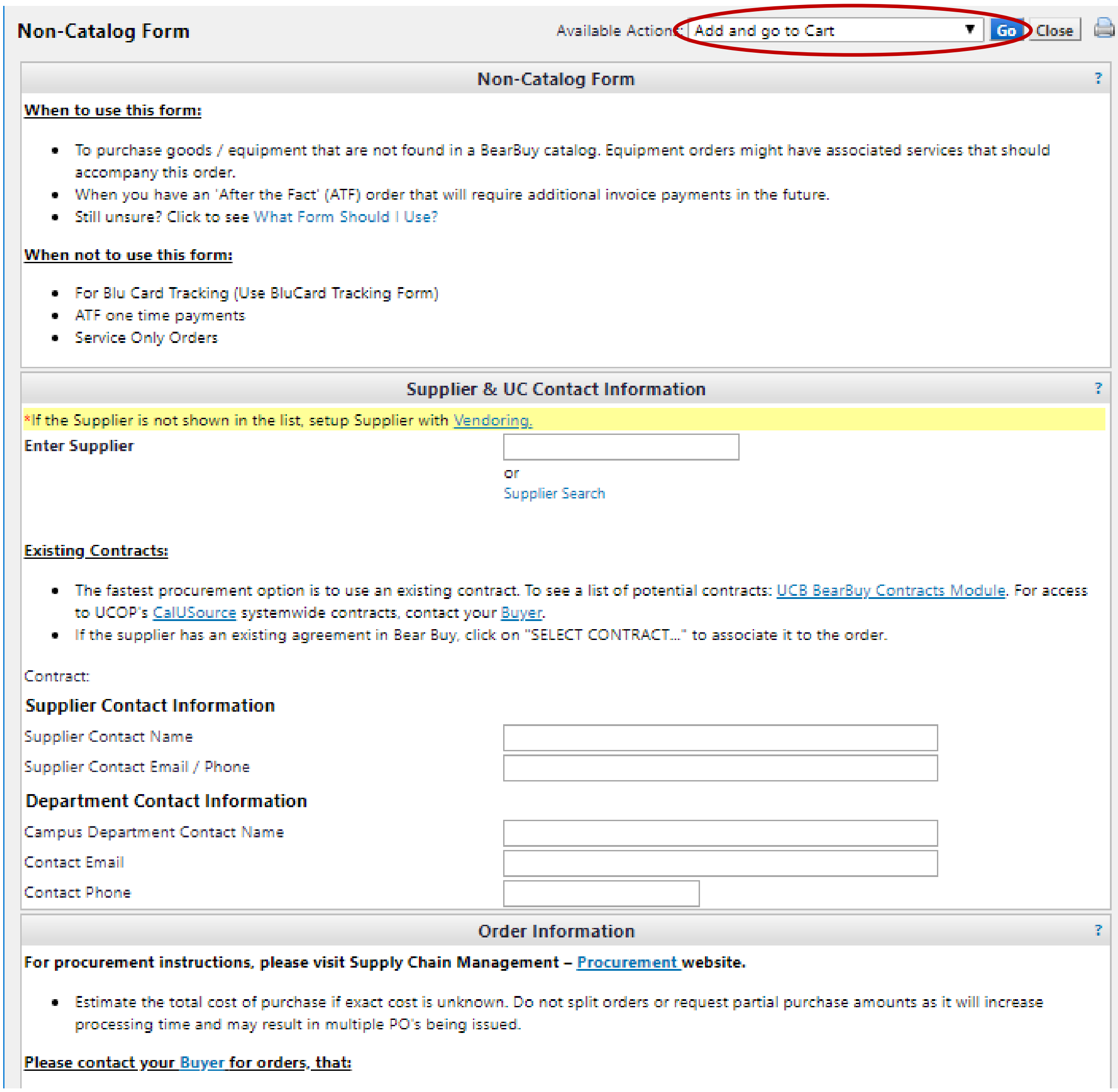
Log in to BearBuy (https:/bearbuy.is.berkeley.edu)

Information regarding BearBuy including Training Information/Job Aids can be found here: https://supplychain.berkeley.edu/bearbuy

- Open Non-Catalog Form – it will open in a new window:



- Complete the form
    - Enter Requested Info
    - Attach required information – see list above
- "Add and go to Cart", click "Go"
    - This will close the form window and attach the form as well as any documents you attached to it to a new BearBuy cart


Non-Catalog Form

Available Actions: Add and go to Cart ▼ Go Close

Non-Catalog Form

When to use this form:

- To purchase goods / equipment that are not found in a BearBuy catalog. Equipment orders might have associated services that should accompany this order.
- When you have an 'After the Fact' (ATF) order that will require additional invoice payments in the future.
- Still unsure? Click to see What Form Should I Use?

When not to use this form:

- For Blu Card Tracking (Use BluCard Tracking Form)
- ATF one time payments
- Service Only Orders

Supplier & UC Contact Information

*If the Supplier is not shown in the list, setup Supplier with Vendoring.

Enter Supplier

or

Supplier Search

Existing Contracts:

- The fastest procurement option is to use an existing contract. To see a list of potential contracts: UCB BearBuy Contracts Module. For access to UCOP's CalUSource systemwide contracts, contact your Buyer.
- If the supplier has an existing agreement in Bear Buy, click on "SELECT CONTRACT..." to associate it to the order.

Contract:

Supplier Contact Information

Supplier Contact Name

Supplier Contact Email / Phone

Department Contact Information

Campus Department Contact Name

Contact Email

Contact Phone

Order Information

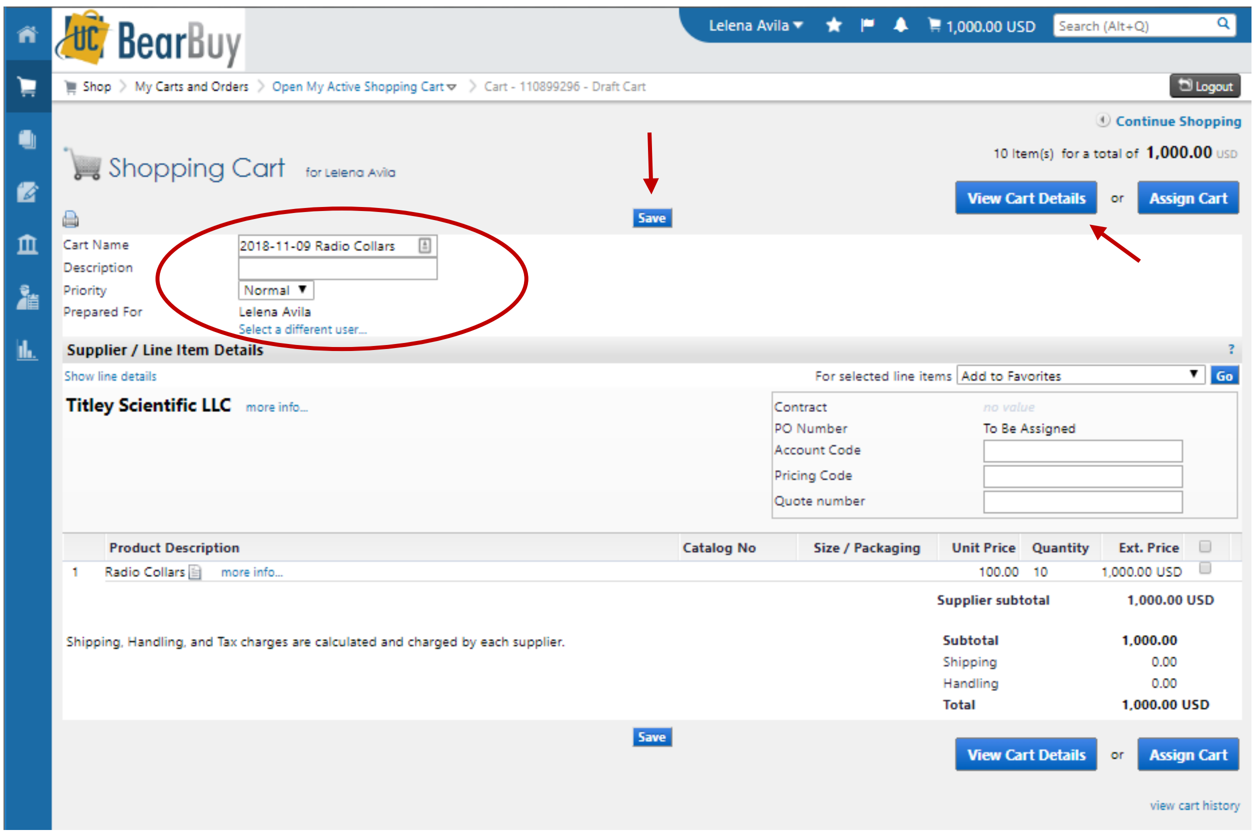
For procurement instructions, please visit Supply Chain Management – Procurement website.

- Estimate the total cost of purchase if exact cost is unknown. Do not split orders or request partial purchase amounts as it will increase processing time and may result in multiple PO's being issued.

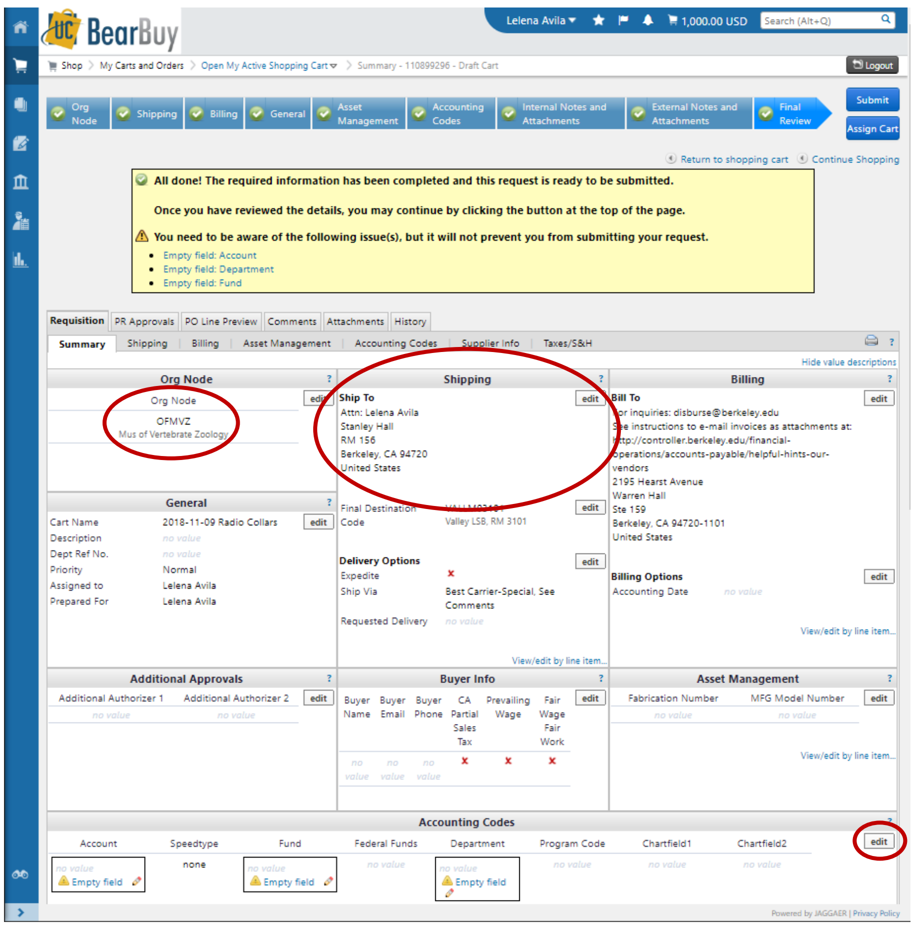
Please contact your Buyer for orders, that:

Complete BearBuy Cart

- Set BearBuy cart name and priority
    - Do not change priority to urgent unless it is actually urgent
    - if you have a contract from the supplier that requires a signature within one week, you may want to choose “urgent” and add a comment to your cart indicating that the signed contract is due to the supplier by a certain date
- Click “Save” and Click “View Cart Details”

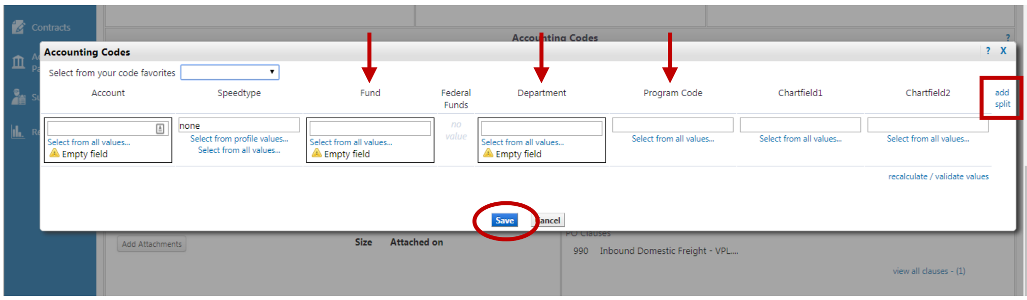


- Complete and verify cart details
    - "Org Node" - verify that it is entered and is correct (OFMVZ = MVZ funds, IBIBI = IB funds)
        - If you are unsure where your funds are housed ask the Research Administrator or Financial Analyst who manages your fund
    - "Ship To" - Verify that your information is entered and is correct
        - How to setup Ship To address in BearBuy Profile Management: https://supplychain.berkeley.edu/how-setup-ship-address-bearbuy-profile-management



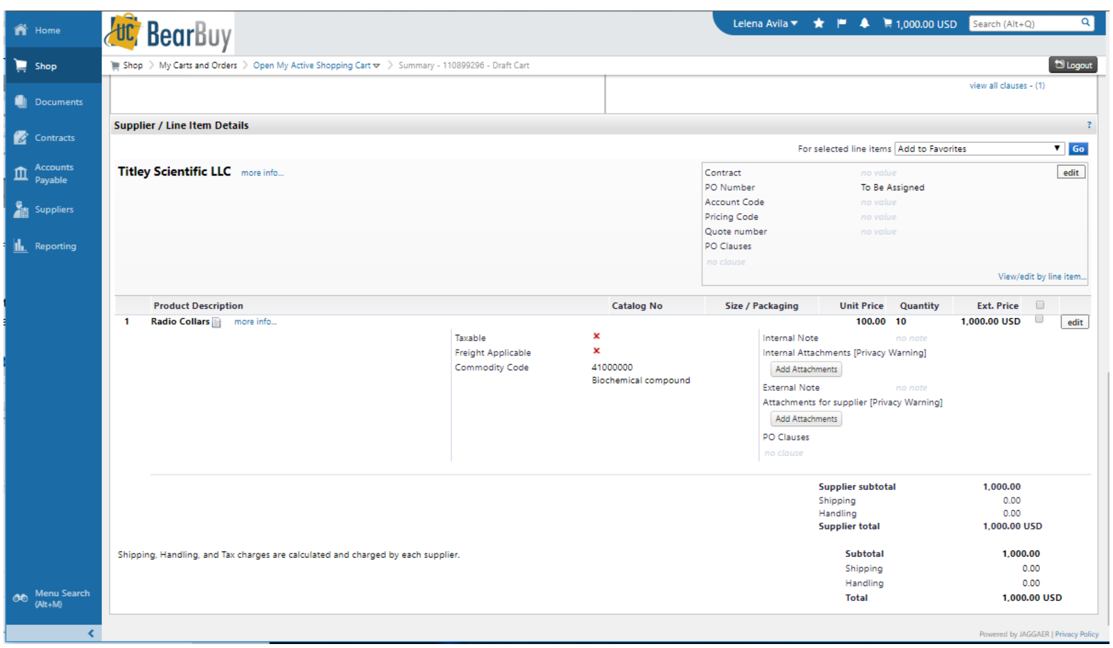
    - Chartstring - Scroll down to the "Accounting Codes" section and click the "edit" button (new window will pop up – see below)

- At minimum your chartstring should include “Fund”, “Department”, and “Program code” (e.g. NNNNN-NNNNN-NN)
- Some chartstrings also include a Chartfield 1 (six characters) and/or Chartfield 2 (five characters)
- “Account” field – leave blank (central campus will enter this number)



- More than one chartstring? Click “add split” at the top right of the window
- “Save” - when you are done (window will close)

○ “Supplier / Line Item Details” - Scroll down the page to verify these details are correct. You can click on “more info…” under “Product Description” to review the Non-Catalog Form you completed



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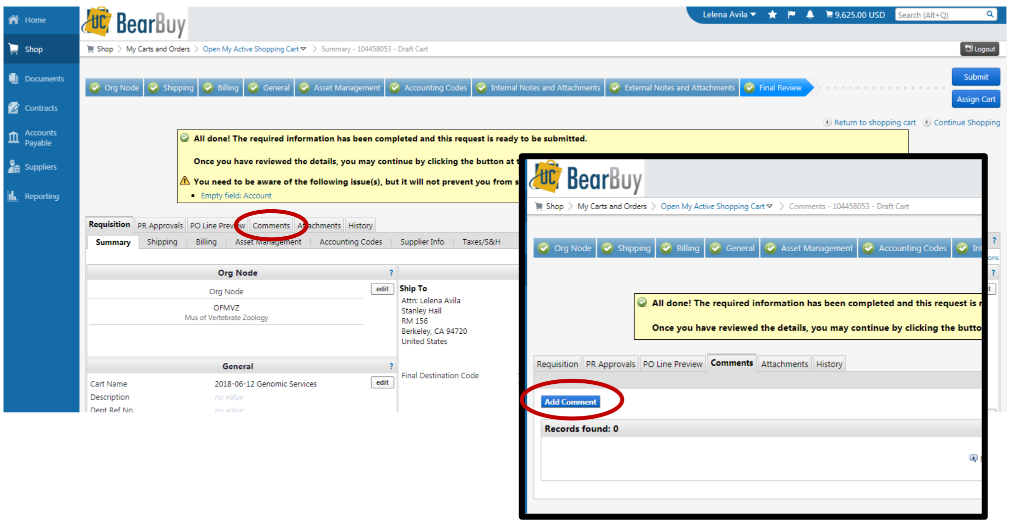
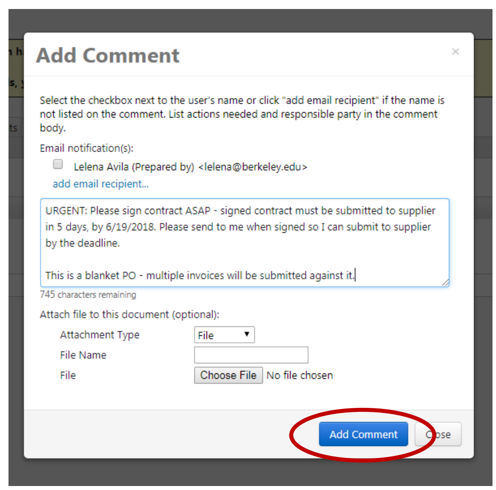
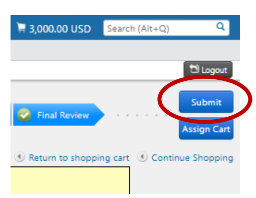
- Add comment(s)
  - Click the “Comments” tab at the top of the page
  - Then click the blue “Add Comment” button



  - Add your comments in the pop-up window, add email recipients (optional), then click the blue “Add Comment” button
    - **Contract Signature** – be sure to note if there is a contract that needs signature, timeframe or deadline to obtain it (if applicable), and any other instruction (i.e. return signed contract to you, etc.)
  - Once you add your comment it cannot be edited



- Submit Cart
  - Click the blue “Submit” button (top right of cart) when all info is added and verified



Follow-up

- Receive email from BearBuy
  - When a PO has been created, you should receive an email from bearbuyadmin@berkeley.edu with subject "Purchase Order #: [PO number] has been sent to the following supplier: [Supplier name]"
  - The PO number begins with "BB"
- Send email to Supplier (optional)
  - To make sure there is no communication error, I prefer to email my contact at the supplier, let them know the PO has been issued by the university, and give them the PO number for reference so they can include it on their invoices
- Check on Contract (if applicable)
  - Best Practice: Once you receive the PO number it is a good time to check on the status of the contract (if you submitted on for signature)

Submit Invoice for Payment

E-mail invoice

When you receive an invoice from the supplier, you will email the invoice to central campus for payment. E-mail and attachments will interface automatically with the campus imaging system.

Follow their instructions ***exactly*** (scroll down to "How to send us an invoice":

https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors

You will NOT receive a confirmation that they have received your invoice

Follow-up

You can view the progress of your invoice in BearBuy. It usually takes a day or two for your invoice to show up in the system.

How to Find the Status of your Order: https://supplychain.berkeley.edu/procurement/how-find-status-your-order