

## America To Go Post Event Process

This guide serves as a supplement to the [America To Go Punch-out Quick Reference Guide](#). Please refer to the main guide for standard instructions about placing America To Go orders.

### When should I use the Post Event Process?

If you placed an on-campus catering order directly with an America To Go (ATG) caterer outside of the BearBuy ATG Punch-out, follow the post event process outlined in this guide. This guide contains instructions for processing the order in the ATG Punch-out so the order can go through the proper approvals and the caterer can be paid.

This post event process should only be used in limited cases where you were not able to place an order in advance using the ATG Punch-out and instead you ordered directly with an ATG caterer.

The preferred ATG caterer ordering method is to place your order using the ATG Punch-out (not directly with the caterer) prior to the event so the order can go through the proper approvals before being sent to the caterer. Review the [America To Go Punch-out Quick Reference Guide](#) for instructions on how to place ATG orders in advance of your event.

### How does the Post Event Process work?

After you place an order directly with an ATG caterer, the caterer/ATG will upload your order to the ATG Punch-out. You will receive an email from ATG when your order is ready for processing. Your order will appear on the main ATG Punch-out page as an "Order Request". You will click on the order then process it in the same manner you would with any other ATG order, only that you will add a special delivery instruction indicating this order has been fulfilled so the caterer knows this order is completed. Please follow the step-by-step instructions in this guide to complete the process.

### What should I do if the ATG caterer already sent me an invoice for an on-campus order? Do I still have to process my order through the ATG Punch-out?

If the caterer sent you an invoice for an order, you will need to process the order through the ATG Punch-out. Ask the caterer/ATG to upload your order in ATG so the caterer can be paid. ATG Customer Service can be reached at (866) 284-8646 for assistance on uploading the order.

### How do I navigate to the ATG Punch-out in BearBuy?

From the UCSF [MyAccess](#) portal, select the link for BearBuy. The default homepage in BearBuy is the Shopping Homepage. If your homepage is not the Shopping Homepage, click on the

Shopping Cart icon in the BearBuy left navigation menu. In the pop-up window, hover your cursor over "Shopping" and click on the link for "Shopping Home".

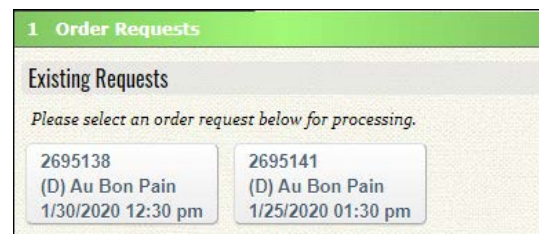
Scroll down the page until you see the America To Go icon, under the heading "Meeting and Entertainment (Special Approval Required)". Click on the America To Go Punch-out. The Punch-out will open in a new window.



## Step-by-Step Instructions for processing your Order in the ATG Punch-out

### 1. Order Requests

In the upper left under **Order Requests**, orders available for processing appear. Click on your order to load the order.



**TIP:** Each order has a unique request number to help you identify orders if you have multiple. This number is included in the email you received from ATG about the order.

The order opens and appears on the main page. Review the order to ensure it is correct. Click the **Accept** button to begin checkout (you can edit the order in the cart once loaded, if needed).

If your order is incorrect, you can click the **Reject** button. If you click this button, you cannot place your order. Contact the caterer/ATG to revise the order and have them upload the order again.

**Request 2695141**

Select accept to load this order to your cart for editing and checkout. Select reject if this order is invalid.

accept reject

866-ATG-TOGO (866-284-8646) AMERICA TO GO customerservice@americatogo.com

**ATG ORDER ID: [TBD]**

Customer	Vendor
<b>Sam Shopper</b> <b>UC San Francisco</b> 500 Parnassus Avenue San Francisco, CA 94143 Tel: (000) 000-0000 Email: sam.shopper@ucsf.edu	(D) Au Bon Pain 19 Fid Kennedy Avenue Boston, MA 02210 Tel: (212) 555-8745 Fax:

**DELIVERY Sat, 1/25/20 01:30 pm**

Qty	Category	Item Description	Unit Price	Line Total
1	L.S. 1.25.20 #85478	Food and Beverage for 50 Guests	800.00	800.00
1	L.S. 1.25.20 #85478	Linens and Staff	250.00	250.00

Payment		Subtotal	1,050.00
ATG ACCOUNT	1,155.00	Tax	105.00
		<b>Total</b>	<b>\$1,155.00</b>

Order placed: Wed, 1/15/20 04:42 pm by Sam Shopper  
 This order is for 50 people  
 \$23.10 per person

The order, time, and location will automatically load in a few seconds. Please allow the order to fully load this information.

2.

## 4 Order

Once your order has loaded, enter the **Tip** amount that was paid. The maximum allowable tip is 18% of your order. Please consider delivery and service fee charges when determining the tip amount. If the tip amount entered exceeds 18%, the tip will auto-adjust to the maximum amount (18%). Then, click the **Check Out** button.

Subtotal	1,050.00
Tax	105.00
Tip (max: 18%; \$189.00)	<input type="text" value="120.00"/>
<b>Total</b>	<b>\$1,275.00</b>

**For Later** **Check Out**

3.

## 5 Check Out

**Payment**

Select the number of people, and the method of payment

Number of People

Amount	Method
1275.00	atg account

**next**

**Number of People:** The number of guests loads. If this number is not accurate, please adjust the number of people. This number is used to calculate the per person cost of food in compliance with entertainment policy. Click the **next** button.

**Expense Order:** Using the dropdown menus, select the meal and activity type and indicate if alcohol was included in the order. Enter the host name and business purpose. Click the **next** button.

**Expense Order**

Please complete these fields. Be sure to add a guest list to the order when you return to BearBuy.  
 (\* indicates a required field)

Meal Type:

Activity Type:

Alcohol?:

Host Name:

Business Purpose:

**prev** **next**

Your order exceeds the per person campus dollar limits as seen in the table below. Please review and edit your order to be within limits. If your event has a specific business requirement which necessitates an exception to campus limits, you may complete this page and click the next button to proceed with this order. However, you will need to obtain exceptional approval for this request and include that approval on the requisition before the event date.

Meal Type	Campus Limit
Breakfast	\$27.00
Lunch	\$47.00
Dinner	\$81.00
Light Refreshments	\$19.00

**TIP:** If your event cost was higher than the policy limits, you will receive a warning notice as illustrated to the right. This does not prevent you from proceeding with the order, but additional approval for policy exceptions using the [Supplemental Form\\*](#) must be obtained in for your order. See the **"Requisition Approvals for Meeting & Entertainment Approvers"** section of this guide for guidance if there is a need to exceed policy limits.

**Instructions:** For post event orders, always enter a message indicating that this order was placed outside of ATG and was delivered. An example message is: "Called and placed order with John. Do not fulfill. Order was delivered on December 1."

**Instructions for Delivery**

Use this space to provide any special pick-up or delivery instructions that are necessary to fulfill your order. This field is optional.

Note: Do not specify your shipping address below. You must select your actual delivery address in the Ship-To section of your BearBuy cart.

instructions

cell number for delivery

**prev** **next**

**Favorite Order:** There is no need to save this order as a favorite. Click the **next** button to navigate to the next page.

**Confirm Information:** The address that appears is the address of the general campus area (step 2) that the order was delivered or where event was held. The actual address of where the catering order was delivered/event was held must be added in the Ship-to location in your BearBuy cart.

The note you added previously in the Instructions for Delivery page are carried over to this page.

**Confirm Information**  
Check the information for your order and click Next when you are done.

Name: Sam Shopper  
Location: Parnassus Heights, 500 Parnassus Avenue, San Francisco, CA 94143  
Phone: (000) 000-0000  
Cell/Alt Phone: v@llemulo phone  
Time: 01/25/2020 01:30 PM  
Service: delivery  
Instructions: [text area]

prev next

On the right side of your screen, you will see a summary of your order information along with the Meeting and Entertainment information that you previously entered.

To print the America To Go order information, select the **print** icon in the upper right corner of this screen.

Once you have confirmed your information, click the **next** button.

AMERICA TO GO  
ATG ORDER ID: 15829601

**Customer:** Sam Shopper, UC San Francisco, 500 Parnassus Avenue, San Francisco, CA 94143  
**Vendor:** (D) Au Bon Pain, 10 Fl Kennedy Avenue, Boston, MA 02210

**DELIVERY Sat, 1/25/20 01:30 pm**  
**\*\*Delivery Instructions\*\***  
Called and placed order with John. Do not fulfill. Order was delivered on January 25.

Qty	Category	Item Description	Unit Price	Line Total
1	L.S. 1.25.20 #85478	Food and Beverage for 50 Guests	800.00	800.00
1	L.S. 1.25.20 #85478	Linens and Staff	250.00	250.00

Subtotal: 1,050.00  
Tax: 105.00  
Tip: 130.00  
Total: \$1,275.00

Expenses: 100% (\$1,275.00) Business Purpose: [text area]

Order placed Thu, 1/22/20 08:18 AM by Sam Shopper  
This order is for 50 people  
\$25.50 per person

- Send the Order to BearBuy:** ATG asks you to review your order one last time. It is **extremely important** that you carefully review your order for accuracy. Click the **submit now** button to return your order to BearBuy as a draft shopping cart.

**Send the Order**

Check your order information to the right and click **SUBMIT NOW** to send your order BearBuy for approval. Once your order is approved, a PO will be assigned and your order will be sent to the vendor.

To go back and modify the order, click **PREV**.

submit now

prev

- Your ATG order is now in your BearBuy cart.** After the past order has been returned to BearBuy, Shoppers or Requesters must complete the Requisition by providing the final guest list, the event address, as well as financial information.

Shopping Cart for Buyer Requester 1  
4 item(s) for a total of 4,018.15 USD

Proceed to Checkout or Assign Cart

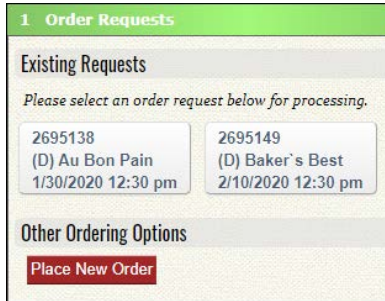
Product Description: 01/25/2020 (D) Au Bon Pain 50 ppl 525.5 each Breakfast | Business Meeting - Conference | Yes | Sam Shopper | Food and Beverage for 50 Guests | Linens and Staff  
Unit Price: 1,050.00  
Quantity: 1  
Total: 1,050.00

**TIP:** The order subtotal will be the total order amount not including tax, tip, or delivery fees. Tax, tip, and delivery fees will be visible on the Voucher, not on the Requisition or PO.

- Completing a BearBuy Requisition:**
  - Guest lists must be attached to the Requisition using the comments tab or internal notes to upload the list of guests or by typing in guest names.
  - The ship to address will be the address that the caterer used for DELIVERY. If this order was picked up, this is the address where the event was held.
  - From this point forward, orders should be completed as a standard Requisition in BearBuy. Instructions for completing a BearBuy Requisition can be found on the [Supply Chain Management Training site](#).
- Requisition Approvals for Meeting & Entertainment Approvers:**
  - ATG Requisitions are routed to Meeting and Entertainment approvers for review even if the requisition was created after the event occurred.
  - If the order requires exceptional approval, a copy of the paper [Supplemental Form\\*](#) signed by the Exceptional Approver should be attached to the Requisition in BearBuy. Approvers are responsible for reviewing the Requisition and validating that the purchase is in compliance with entertainment policy:
    - Documentation is complete and correct.
      - Guest List attached, Host Name provided and Business Purpose visible.
    - Allowable funding sources are used.

### Placing a regular Order with Custom Orders

1. If you want to place a regular order from caterer menus without placing an available custom order that appears for you in ATG, you can click the [Place New Order](#) button instead of clicking an order.



**1 Order Requests**

Existing Requests

*Please select an order request below for processing.*

2695138 (D) Au Bon Pain 1/30/2020 12:30 pm	2695149 (D) Baker's Best 2/10/2020 12:30 pm
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Other Ordering Options

[Place New Order](#)

This will bring up the regular ordering process where you can create an order from caterer standard menus.

Be sure to remember to come back into ATG to place your custom order as well. Once these orders are placed, they disappear from your ATG account.

\*NOTE: some schools have their own exceptional approval process. Please check with your school on their processes.