BearBuy – Receiving Process

Effective April 2014, the department process for receiving in BearBuy and backup collection is changing. The end user is required to complete receiving process in BearBuy. Per UCOP policy, it is mandatory to retain records for six years. **The original packing slips must be sent to the appropriate reconciler.** For more details, please refer to the link to the University of California Records Retention Schedule: http://recordsretention.ucop.edu/

Friendly tips:
- **Please complete the BearBuy receiving process daily, upon receipt of the order**.
- When possible, ask lab shoppers to assist with the receiving process
- Alternative instructions can be accessed here: https://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/BearBuy_Receiving_Quick_Reference.pdf

When reconciling, we look at the PO first to see if the information in the **red box** is completed (see below). When all items are received each line should confirm that the item was **"Fully Received"**. In order for that message to appear in the box, you **"Create a Quantity Receipt"** or **"Create a Cost Receipt"**, under the receipt tab. *You can only create a Quantity/Cost Receipt if the PO is still open.* If the **PO is closed attach a comment** with the packing slip (if available) to the PO or Requisition (see instructions below).

Creating a Quantity Receipt in BearBuy:

1. **Click on "Receipts" tab at the top**

2. **To the right, there is a drop down menu labeled "Available Actions." Click, "Create Quantity Receipt."**

3. **Fill in the appropriate information: "Receipt Name", "Receipt Date", etc. To attach an electronic copy of a physical receipt, click "Attach/Link." Click, "Chose File" to browse for the correct file and then click "Attach Document".** (NOTE: you can still create a quantity receipt even if you do not have a physical packing slip, etc. The quantity receipt is just an easier way to confirm that you have received your items without leaving a comment after the PO is closed. In order to keep up with your received orders, please create a quantity receipt as soon as you receive the orders)

4. **When you are done with filling out the necessary information, click "Complete" and the receipt will attach to the PO. To check if the receipt process was completed, click the "Status" tab on the PO; all lines under the Receiving column will indicate that the items are "Fully Received" (in the red box above).**

Creating a Cost Receipt in BearBuy:

- This entails a similar process to creating a quantity receipt, except this is used for service orders, where you do not have a quantity but an amount given on a packing slip. (ex: Labor/Project Management – Pivot Interiors)

1. **As in directions above, click the "Receipts" tab. To the right of the screen, there is a drop down menu labeled "Available Actions." Click, "Create Cost Receipt"**

2. **Fill in the appropriate information: "Receipt Name", "Receipt Date", etc. To attach an electronic copy of a physical packing slip, click "Attach/Link." Click, "Chose File" to browse for the correct file and then click "Attach Document".**

3. **Click "Complete" when all information is properly entered.**

Creating a Receipt when the PO is CLOSED:

- In the event that you have not created a quantity receipt or cost receipt while the PO is still open, you can create insert a comment in the PO (with packing slip, if available) confirming that all items on the order were received.

1. **When PO is closed, click "Comment" tab.**

2. **To the right, under the "Available Actions" drop down menu, click "Add Comment"**

3. **A pop up will appear, attach a "File" with the packing slip and a brief note indicating that you have received all items.**

4. **Once you have clicked, "Add Comment" your comment will appear in the comment section:**