

# 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](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

The screenshot shows the BearBuy interface for a Purchase Order (PO) with reference number B000669389. The 'Receipts' tab is highlighted in yellow. The 'Available Actions' menu is visible, containing options like 'Add Comment', 'Create Quantity Receipt', and 'Create Cost Receipt'. The 'Line Item Status' table below shows three items: HP LJ PRO 400 M451 YELLOW, QUANTUM AA 20/PK, and CERAMIC MINI-TOWER HEATER. The 'Supplier Receiving' column for these items shows 'Fully Received', 'none', and 'none' respectively.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓ HP LJ PRO 400 M451 YELLOW	S1545-12A	EA	88.26	1 EA	88.26 USD	Supplier	Fully Received	Fully Invoiced	Fully Matched
2 ✓ QUANTUM AA 20/PK	L9QU1500B20Z10	PK	16.91	2 PK	33.82 USD	Supplier	none	Fully Invoiced	Fully Matched
3 ✓ CERAMIC MINI-TOWER HEATER	M5BCH9212R-NU	EA	64.05	1 EA	64.05 USD	Supplier	none	Fully Invoiced	Fully Matched
<b>Total</b>									<b>186.13 USD</b>

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

The screenshot shows the 'Receipts' page for the same PO. The 'Available Actions' menu is open, and the 'Create Quantity Receipt' option is highlighted in yellow. Below the menu, a receipt is shown with number 10060246, dated 6/17/2015, for quantity received. The 'Receipt Line Details' table shows the three items from the previous screenshot, with their status: 'Net Received', 'Open', and 'Open'.

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	HP LJ PRO 400 M451 YELLOW	S1545-12A	88.26 USD	1 EA	88.26 USD	1		Net Received
2	QUANTUM AA 20/PK	L9QU1500B20Z10	16.91 USD	2 PK	33.82 USD			Open
3	CERAMIC MINI-TOWER HEATER	M5BCH9212R-NU	64.05 USD	1 EA	64.05 USD			Open

- 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)

**Header Information**

Receipt Name: 2015-06-17 SF847834 02      Receipt Create Date: 6/17/2015 9:59:00 AM      Source: Manual

Receipt No: To Be Assigned      Receipt Date: 6/17/2015 (mm/dd/yyyy)      Packing Slip No.:      Supplier Name: OFFICEMAX INCORPORATED      Received by: DESIREE POWERS

Location:      RECEIPT ADDRESS:      Carrier:      DELIVERY: Other

Tracking No.:      Flexible Text Field:      Flexible Text Field 2:      Flexible Drop Down:      Attachments: Attach/Link

**Receipt Lines**

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
	2	QUANTUM AA 20/PK	L9QU1500B20Z10	2 PK		2		Received	Remove Line, Receive & Return
	3	CERAMIC MINI-TOWER HEATER	M5BCH9212R-NU	1 EA		1		Received	Remove Line, Receive & Return

Buttons: Delete, Add PO, Save Update, Complete

- 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)

- 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”

The screenshot shows the BearBuy interface for a purchase order from PIVOT INTERIORS INC. The 'Receipts' tab is selected in the navigation bar. The 'Available Actions' dropdown menu is open, showing options: Add Comment, Add Notes to History, Create Quantity Receipt, Create Cost Receipt (highlighted), and Print Fax Version. A message below the menu states: '1 draft receipts exist for this PO view' and 'There are no receipts for this PO.' The total amount is 48,039.51 USD.

- 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”.

The screenshot shows the 'Header Information' and 'Receipt Lines' sections of the BearBuy interface. In the 'Header Information' section, the 'Receipt Name' is 2015-06-22 SF847834 02, the 'Receipt Create Date' is 6/22/2015 9:54:19 AM, and the 'Supplier Name' is PIVOT INTERIORS INC. The 'Receipt Date' is 6/22/2015. In the 'DELIVERY' section, the 'Attach/Link' button is highlighted. The 'Receipt Lines' section shows three lines with details: PO No., PO Line No., Product Name, Catalog No., Qty/Cost Ordered, Previous Receipts, Cost, Line Status, and Actions. The 'Complete' button is highlighted at the bottom right.

PO No.	PO Line No.	Product Name	Catalog No.	Qty/Cost Ordered	Previous Receipts	Cost	Line Status	Actions
	1	For technical ancillary specs and Project Management		43,765.51		43,765.51	Cost Received	Remove Line Receive/Cancel
	2	For technical ancillary specs and Project Management		799.00		799.00	Cost Received	Remove Line Receive/Cancel
	3	For service west labor, receive, deliver & install product in two phases.		3,475.00		3,475.00	Cost Received	Remove Line Receive/Cancel

- 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.

The screenshot shows the PO system interface for OFFICEMAX INCORPORATED. The 'Comments (2)' tab is highlighted in yellow. The 'Document Status' section shows 'Closed' and 'Completed' in a red box. The 'Line Item Status' table lists 9 items with their descriptions, catalog numbers, sizes, unit prices, quantities, and extended prices. The total value is \$819.49 USD.

Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	ADHESIVE STICKY BACK BK	A191137	RO	43.14	1 RO	43.14 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
2	POUCH LAM LTR	L252040	PK	45.22	2 PK	90.44 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
3	POUCH LAM LTR 10MIL 50 PK	L252042	PK	63.35	1 PK	63.35 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
4	12PK TAPEW/BLACK SHE DISPENSER	A8810K12C30B	EA	23.04	2 EA	46.08 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
5	LP DRYLINE CORRECTION 5PK	A95032315	PK	7.41	2 PK	14.82 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
6	ASPEN 30 20# 8.5X11 CS	P1054901-CTN	CT	33.94	4 CT	135.76 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
7	ADVIL REFILL 2/PACK	W315000	BX	17.35	2 BX	34.70 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
8	CUP HOT 12OZ 600/CT INSUL	A7EPBNHC12WD	CT	149.23	2 CT	298.46 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
9	SUPERWARE PLATES 4/125	A75X11PLPATH	CT	92.74	1 CT	92.74 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
<b>Total</b>						<b>819.49 USD</b>				

### 2. To the right, under the “Available Actions” drop down menu, click “Add Comment”

The screenshot shows the PO system interface with the 'Add Comment' button highlighted in yellow in the 'Available Actions' menu. The 'Comments (2)' tab is selected. The 'Records found: 2' section shows a comment added on 6/3/2015 at 11:49 AM, stating that the PO has been received and a delivery receipt is attached.

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

The screenshot shows the 'Add Comment' pop-up window. The 'Attach file to this document (optional):' section is highlighted, showing a 'File Name' field and a 'Choose File' button. The 'Add Comment' button is also visible at the bottom.

### 4. Once you have clicked, “Add Comment” your comment will appear in the comment section:

The screenshot shows the PO system interface with the comment section. The comment text is: 'PO # [redacted] has been received. Please see attached copy of delivery receipt.' The attachment is 'OfficeMax-[redacted].pdf (381k)'. The 'Add Comment' button is highlighted in yellow.