

# ERSO BearBuy Cart Authorizer Quick-Start

1. Log in to BearBuy from *Blu.berkeley.edu* with your CalNet ID; click on *Finance > BearBuy* (link in left sidebar).

**2. Check Action Items; under Approvals click on Carts Assigned to Me**

**3. View a Draft Cart**

Active Cart	Shopping Cart Name	Date Created
<a href="#">PR</a>	<a href="#">2011-11-15 ray 03</a>	11/15/2011
<a href="#">PR</a>	<a href="#">2011-11-17 ray 01</a>	11/17/2011
<a href="#">PR</a>	<a href="#">2011-11-18 ray 01</a>	11/18/2011

**Click Button to View Cart Details**

**4. Click PO Line Preview Tab to Review Cart Contents, totals**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Comb, Multichannel Pipet-Compatible	1704450	1PC EA	51.00	5 EA	255.00 USD
<b>PO subtotal</b>					<b>255.00 USD</b>

**5. Click *Requisition>Summary* tab to check Org Node (EERCT); edit if needed**

Using Profile Values

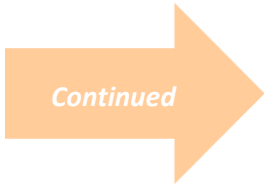
Select Unit to process this cart

**6. Click on *Requisition>Accounting Codes* Tab**

Click any 'Empty Field' link

ACCOUNT field value can be left blank

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1 (Project)	Chartfield2 (Flex)
General Supplies	none	no value Empty field	no value	no value Empty field	44 Organized & Sponsored Research	no value	no value



**7. Click SPEEDTYPE Field 'Profile Values' link**

**Select project Nickname from drop-down**

**Fields populate with the full chartstring; SAVE**

**Click to FINAL REVIEW step**

**8. SUBMIT Cart for Processing<sup>A</sup>**

**What's Next**

The **Requisition Creator<sup>B</sup>** prepares the purchase/payment, then forwards the requisition to your RSO for fund authorization and final review. The order is then sent to the vendor for fulfillment. Refer to the [ERSO BearBuy Process Map](#) on the [ERSO website](#) for further detail.

<sup>A</sup> **SUBMIT** the Cart if ready for purchase; if not, you can either **REVISE** the cart contents then submit; **ASSIGN** the cart back to the shopper with a comment; or **DELETE** the cart from the system (Under *Draft Carts* tab, click *Delete* button at far right.)

<sup>B</sup> The **Requisition Creator** is a department buyer who prepares the order for purchase with the vendor via PO or a direct voucher for payment. This role corresponds to the **"Purchasing Agent"** or **"Processor"** in the ERSO Intranet.