## Team 2 (ERSO) BearBuy Blucard Reconcile Process

<table>
<thead>
<tr>
<th>BFS BC Staging</th>
<th>Blucard Purchaser</th>
<th>Shipping / Receiving</th>
<th>Financial Analyst II</th>
<th>RSO</th>
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</thead>
</table>
| Prior to Staging | 1. Receives non-catalog requisition\(^1\); assigns to a Req Creator (RC)  
2. RC Purchases item with BluCard Selects Supplier: ‘BluCard Tracking’ | | | |
| | 3. Uploads to BearBuy Attachments Tab, following Team 2 (ERSO) naming convention\(^3\)  
   • Invoice (if available)  
   • Order confirmation / receipt showing payment  
4. Matches transaction in BFS Reconcile Screen with BearBuy CC#, applying Description per Team 2 (ERSO) BC Reconcile naming convention\(^2\) | Receives in BearBuy  
   • Looks up PO by reference on Packing Slip / other POR  
   • Creates quantity receipt in BearBuy Receipts screen; records POR following Team 2 (ERSO) Receiving process and naming convention\(^3\) | | |
| Prior to Day 7 | | | | |
| Prior to Day 10 | | | | |
| Prior to Day 15 | | | | |

1. Only the Non-Catalog form can be used for BC Purchases. If requisition contains a different form, Purchasing staff replaces it with non-catalog form, or returns cart with request to change the form.

2. **Naming Convention for BFS Reconcile Statement Description Field**: BearBuy CC# / Initial (e.g. CCXXXX / AW)

3. **Naming Conventions for back-up files uploaded to BearBuy**
   - Invoices: BearBuy CC#_Inv (e.g., CCXXXX_Inv1, CCXXXX_Inv2…);
   - Packing slip/Receipt: BearBuy CC#_POR (e.g., CCXXXX_POR1, CCXXXX_POR2…) OR Shipping/Receiving Log format: MMDDYYBuildingName
   - Entire back-up file (e.g., packing slip with invoice): BearBuy CC#_backup (e.g., CCXXXX_backup)

4. **Best Practices for RSO approvals**:
   - **RSO should approve transaction without POR if necessary**, prior 15th day of staging. Shipping/Receiving continues a back-end review process to attach POR after staging. RSO should work through Shipping/Receiving rather than requester, to secure POR.
   - Team 2 (ERSO) **Blucard After-the-Fact approval process** should be followed on transactions not approved within BFS staging period.

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\(^2\) **Naming Convention for BFS Reconcile Statement Description Field**: BearBuy CC# / Initial (e.g. CCXXXX / AW)

\(^3\) **Naming Conventions for back-up files uploaded to BearBuy**
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   - Entire back-up file (e.g., packing slip with invoice): BearBuy CC#_backup (e.g., CCXXXX_backup)