Shopping - CA Partial Sales Tax Exemption Orders BearBUY UC Berkeley

NAME OF PURCHASER University of California, Berkeley Reminders! PRINTED NAME OF PERSON SI Effective July 1, 2014 through June 30, 2022, the California State Board of John Doe ADDRESS OF PURCHA Equalization (SBOE) is offering a reduced sales/use tax rate on equipment purchased 1995 University Avenue, Suite 325 for research and development in biotechnology, physical engineering, and life PERMIT NUM 12345 C sciences. EMAIL ADO nobody@berkeley.edu To determine if a product qualifies for exemption, please visit the Supply Chain Management -CA Partial Sales Tax Rate Exemption webpage. It is the Department's responsibility to ensure the product being purchased gualifies for partial sales tax exemption. If it is later determined that the purchase does not qualify for the sales tax exemption, the department will be responsible for the additional tax assessment, fines, and interest. a. Enter Supplier Name. UC Berkeley permit number is SR-CH-21-135302 A Partial Exemption Certificate for Manufacturing, Research and Development Equipment (BOE-230-M) is required to be completed for every product and attached to every BearBuy cart. All gualifying catalog and non-catalog products, with the exception of Sole Source orders, must be Available Actions: Add and go to Cart ordered on the Non-Catalog form. 3. Qualifying Sole Source orders must be placed on the Sole Source Over \$100K form and follow the same process and program requirements. Users cannot mix gualifying and non-gualifying products on the same cart. The cart will not be My Cart accepted if submitted with both product types. Partial Sales tax purchase. Tax related questions should be sent to Accounts Payable (disburse@berkeley.edu) Price: 7,000.00 USD Contact the BearBuy Help Desk for all other questions (bearbuyhelp@berkeley.edu) Completing the Partial Exemption Certificate for Manufacturing, Research and **Development Equipment** Approvals PO Line Preview Summary 1. Access the Partial Exemption Certificate for Manufacturing, Research and Development Equipment by going to: https://controller.berkeley.edu/sites/default/files/ Additional Additional edit cdtfa-230-m-uc-berkeley.pdf Authorizer 2 SELLER'S/LESSOR'S NAME 2. Enter Supplier name and order/fulfillment address in the Seller/Lessor name section. If you do not know the SELLER'S/LESSOR'S ADDRESS (street, city, state, zip code) 5. Supplier address, you can leave the address section blank. **Buyer Info** uver Name Buver Email Buyer Phone Buyer 3. Identify how the product will be used by is qualified tangible personal property and will be used by me primarily (please check one Interventio Needed 1. for manufacturing, processing, refining, fabricating, or recycling selecting the appropriate checkbox 2. If for research and development;

3. I to maintain, repair, measure, or test any property being used for (1) or (2) above; or

(check only one). 4. as a special purpose building and/or foundation. 4. Enter a precise description of the product being purchased. If you require additional space, please attach a separate sheet.



- Read and review the purchaser section. Enter: 5.
 - a. University of California, Berkeley as the Purchaser
 - b. The Shopper's name, title, address, and telephone number.
 - SR-CH-21-135302 as UC Berkeley's permit number (reseller number) C.
 - d. Date the document was signed.



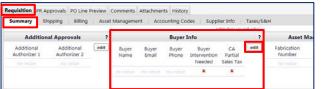
6. Print and sign the certificate.

Placing Your Qualifying Order in BearBuy

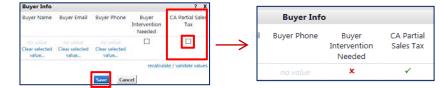
- 1. Locate the Non-Catalog Form from the Frequently Used Forms section and:
 - b. Enter appropriate Expense Information (Product description, qty, estimated unit price, etc). c. Attach quote/estimate and sales tax exemption certificate as an External Attachment.
- 2. From the Available Actions drop-down menu, select Add and go to Cart, and press Go. Go Close
- Select the Shopping Cart icon on the top right banner. From there select Checkout. Carla Prado 🔻 🔺 Action Items Notifications 🍹 7.000.00 USD 🔍



4. Navigate to the Buyer Info section within Requisition - Summary and select edit.



Select the CA Partial Sales Tax checkbox and click Save.



Continue to add the sales tax exemption certificate and/or additional comments, navigate 6. to the Comments tab, and select Add comment.

Click the browse button to select the partial sales tax exemption certificate. Select the Add Comment button.

Complete the shopping process: Populate the remaining requisition fields (e.g. ship to, 7. Org Node, etc) and when ready, Assign or Submit the cart. Instructions on completing a BearBuy requisition can be found on the Supply Chain Management BearBuy Instructional Resources site (http://supplychain.berkeley.edu/bearbuy/instructional-resources-0).