



DOING BUSINESS WITH BERKELEY LABORATORY

GUIDELINES FOR ECOMMERCE SUPPLIERS (NON CXML)

June 9, 2016

V5



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Preface

The Lawrence Berkeley National Lab (Berkeley Lab) is a member of the national laboratory system supported by the U.S. Department of Energy through its Office of Science. It is managed by the University of California (UC) and is charged with conducting unclassified research across a wide range of scientific disciplines. Located on a 200-acre site in the hills above the UC Berkeley campus that offers spectacular views of the San Francisco Bay, Berkeley Lab employs approximately 4,200 scientists, engineers, support staff, and students.

At Berkeley Lab we realize the strategic importance and value of our suppliers as contributing to our overall success. The “Doing Business with Berkeley Lab: Guidelines for eCommerce Supplier” documents the standards, guidelines and expectations for establishing and maintaining a supplier relationship with Berkeley Lab’s ecommerce program, eBuy.



Sales or Use Tax

Items purchased by the University are treated as for resale, per the University's California State Resale Permit No. SR-CH 21-835970 for LBNL, and shall not be subject to any California or other State sales or use tax if shipped to California. Any items furnished for rentals or leases are subject to California State sales or use tax, and such tax is included in the fixed prices/rates.

The University of California State Resale Permit No. SR-CH 21-835970 for LBNL is available at: <http://procurement.lbl.gov/supplier-forms/>

Purchase Orders

Subcontractor must provide a valid email address for receipt of Purchase Orders (“Orders”). Orders shall be sent by email in PDF format direct from LBNL to the Subcontractor at the completion of a valid Order in the eCommerce purchasing system. The “subject” line of the email will state “Dispatched Order”.

Managing Orders

Once an Order has been transmitted to the Subcontractor through the eProcurement System, the Subcontractor’s customer service department is prohibited from assisting Users with:

- Order changes, including increasing or decreasing Order quantities
- Order cancellations
- Shipment method changes

Only an authorized LBNL Procurement customer service representative may assist Users with:

- Order changes, including increasing or decreasing Order quantities
- Order cancellations
- Shipment method changes

The authorized LBNL Procurement customer service representative will communicate Order changes to the Subcontractor. Subcontractor is responsible for responding to the authorized



LBNL Procurement customer service representative within two business hours and updating Order records within one business day.

The Subcontractor shall immediately contact an LBNL Procurement Customer Service Representative should it receive an Order with incorrect pricing. Any Orders accepted by an authorized representative of the Subcontractor shall be deemed accurate and shall be binding. Subcontractor shall provide email confirmation to Users (including LBNL Order number and Subcontractor Order number) upon:

- Order confirmation, with item(s) ordered and the delivery due date(s)
- Notification of backordered item(s), with item(s) backordered and the updated delivery due date(s)
- Notification of Order shipment, with item(s) shipped and shipment tracking number(s)
- Receipt of Order return / return merchandise authorization (RMA), with item(s) returned, amount of credit due, and date Order will be credited

Submittal of Invoices

Invoices must be submitted within ten business days from shipment of ordered items or delivery of ordered services by email directly to the LBNL Accounts Payable Office at APInvoice@lbl.gov. The "subject" line of the email shall state the Subcontractor's name and the Agreement number.

Invoices shall clearly state the following information:

- Purchase order number
- Subcontractor name (including business heading or logo)
- Invoice date
- Unique invoice number
- Remittance address
- Items being invoiced
- Any separately payable overnight shipping (if requested by the Lab customer)
- Any separately payable freight charges



Invoices in a spreadsheet format are not acceptable, but a spreadsheet can be used to support an invoice. The Subcontractor shall maintain records which support all invoiced amounts, and provide them to the University Procurement Representative upon request.

If an invoice has incorrect information, i.e. wrong quantities, the supplier is to correct and resubmit it to the LBNL Accounts Payable Office. To process payment, the invoice must match the contents of the PO. Incorrect information shown on the invoice can lead to match exceptions, payment delays or freight reimbursements.

If an Order is over 60 days, and the products have been delivered, the Subcontractor will be notified of any Orders that are pending an invoice. Upon this notification, the Subcontractor shall send the invoice within five business days.

Submittal of Credit Memos

Credits must be submitted within ten business days after receiving the returned item by an email directly to the LBNL Accounts Payable Office at APInvoice@lbl.gov. The "subject" line of the email shall state the Subcontractor's name and the Agreement number.

Credit Memos should clearly state the following information:

- Purchase order number
- Subcontractor name (including business heading or logo)
- Invoice date
- Unique invoice number
- Remittance address
- Items being credited
- Any separately payable overnight shipping (if requested by the Lab customer)
- Any separately payable freight charges

The quantity should be negative and the price remains positive.



Payment Terms

The terms of payment shall be 30 days (or 15 days if the Subcontractor is a designated small business for the Agreement) after receipt of a proper invoice; provided, however, that payments made thereafter shall not be subject to any penalty, interest, or late charges. Only those items/services identified in the Order will be considered for payment. Payment amounts may be adjusted for any applicable credits, offsets, or withholds. Payment of an invoice shall not constitute final acceptance of the supplies or services. Payments shall be made to the subcontractor using the automated clearing house (ach) network.

Shipping Requirements

Shipping Terms. The shipping terms are F.O.B. Destination, standard freight included. All shipments shall be shipped via the Subcontractor's vehicles or a licensed common carrier selected by the Subcontractor, at the Subcontractor's expense.

Delivery Addresses. Deliveries shall be limited to the following addresses. Deliveries to any other addresses than those listed below require authorization from the University Procurement Representative.

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|---|---|
| Lawrence Berkeley National Laboratory One Cyclotron Rd. Building 69 Central Receiving, Room 150 Berkeley, CA 94720 | Joint Genome Institute 2800 Mitchell Drive Building 400 Walnut Creek, CA 94598 |
|---|---|

Delivery Requirements

Deliveries must be made by 9:00 a.m. Pacific Time, Monday through Friday to the delivery address denoted above; 10:00 a.m. by common courier (UPS, FedEx) is acceptable.

Optional accelerated next business day shipping shall be available to the University as required, freight pre-paid/added and reimbursed at the University's expense. Orders requiring next



business day delivery shall be issued no later than 9 a.m. Pacific Time to ensure next day delivery.

Delivery Package Information

Subcontractor shall affix the Order number, detailed name and location information, including building and room number or mailstop, for the person placing the Order and other information as directed by the University on all delivery packages, which will be used by the University to receive and deliver packages to University requesters.

An example of the shipping label format is:

UC Lawrence Berkeley Lab
Attn: Ukena, Amy / PO 7200000
One Cyclotron Road, Building 69
M/S 011-0123A
Berkeley, CA 94720-0001 US

eBuy Program Team

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Questions regarding orders, invoices and payment should be directed to the LBNL Procurement Help Desk. The Help Desk hours are 8:00 am to 5:00 pm PT, Monday through Friday. Their contact information is (510) 486-6400 and by email ProcurementHelp@lbl.gov.