



MARCH 27, 2026

CSULB - CSUBUY USER GUIDE





CSULB CSUBUY USER GUIDE FOR END USERS

(FOR SHOPPER, REQUESTER, AND DOA APPROVER)

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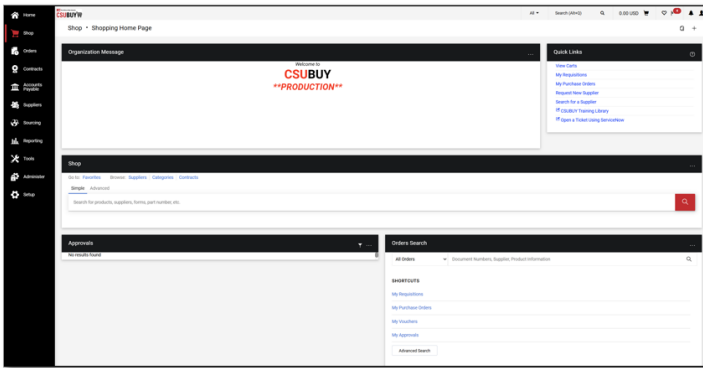
INTRO: INTRODUCTION

Please note, The CSUBUY User Guide is intended for Shoppers, Requesters and DOA/Fiscal Approvers. It was created using training materials from other campuses and the CSUBUY test environment. Therefore, some screenshots may differ from the live system. We welcome your feedback on additional content or changes that would improve this guide. To share your thoughts, please contact us at fishelp@csulb.edu or FM-Training@csulb.edu.

1-WHAT IS CSUBUY?

CSUBUY is a system for purchasing and the payment of goods and services.

CSUBUY is the implementation of strategic, standardized procurement processes that allows for the elimination of manual touchpoints and steps resulting in efficiencies through automation, risk mitigation and cost savings for the California State University.

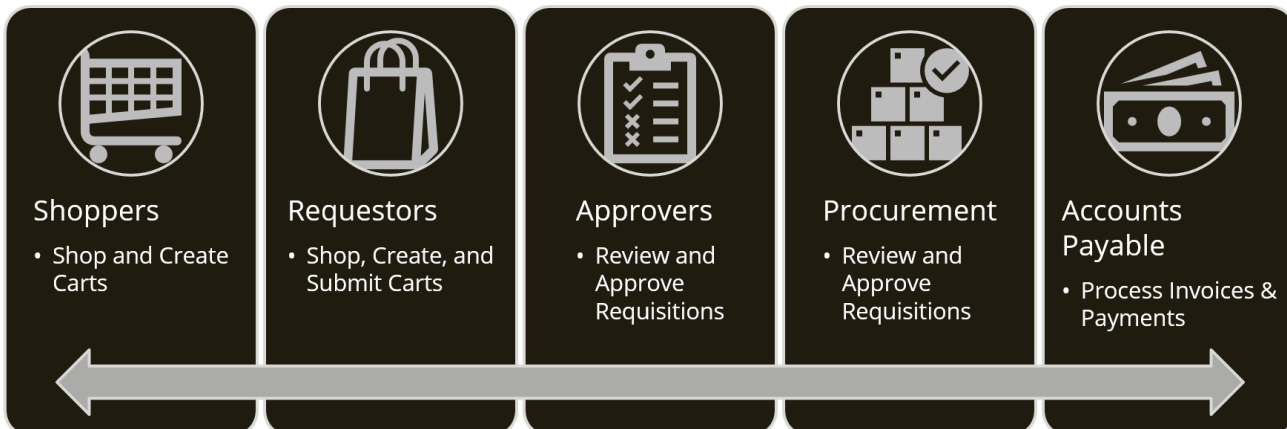


In simple terms, we aim to make things easier, more efficient, and standardized.

2-WHO USES CSUBUY?

Anyone involved in the process of purchasing, invoicing, and paying for goods and services are users of CSUBUY.

Below are the User Groups or Roles and what they do in CSUBUY:



The primary difference between a Shopper and Requester is that a Requester can submit a Shopping Cart to workflow, turning the Cart into a Requisition. A Shopper does not have this ability. Therefore, the Shopper must assign or send their Cart to a Requester for it to be submitted to workflow. A Shopper is not required to enter chartfields. A Requester must ensure a chartfield is entered before submitting a Shopping Cart to workflow.

Shopper vs Requester Users

Shopper

- Can browse catalogs, PunchOuts, and forms to build shopping carts.
- Cannot submit requisitions for approval.
- Sends carts to a Requester for review and submission.
- Ideal for departmental users who identify needs but do not manage budgets.

Requester

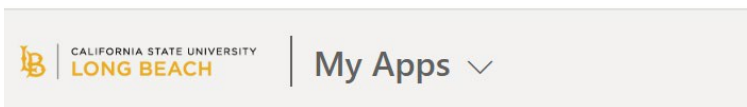
- Can shop for goods and services **and** submit requisitions for approval.
- Reviews and edits carts received from Shoppers.
- Responsible for entering chartfields, verifying funding, and ensuring compliance.
- Acts as the main point of contact for procurement processing.

Access to CSUBUY is obtained by being assigned a role in CSUBUY. Log into CSUBUY via the CSUBUY Procure to Pay (P2P) tile in CSULB Apps.

3-HOW TO ACCESS CSUBUY

To access CSUBUY, you must be assigned a CSUBUY Role by your manager and/or ASM. After receiving appropriate approvals, the CMS Team will then provide access.

You log in to CSUBUY by going to CSULB Apps in SSO:



Make sure you select the tile with the shopping cart below and not the Test site or Marketplace site.

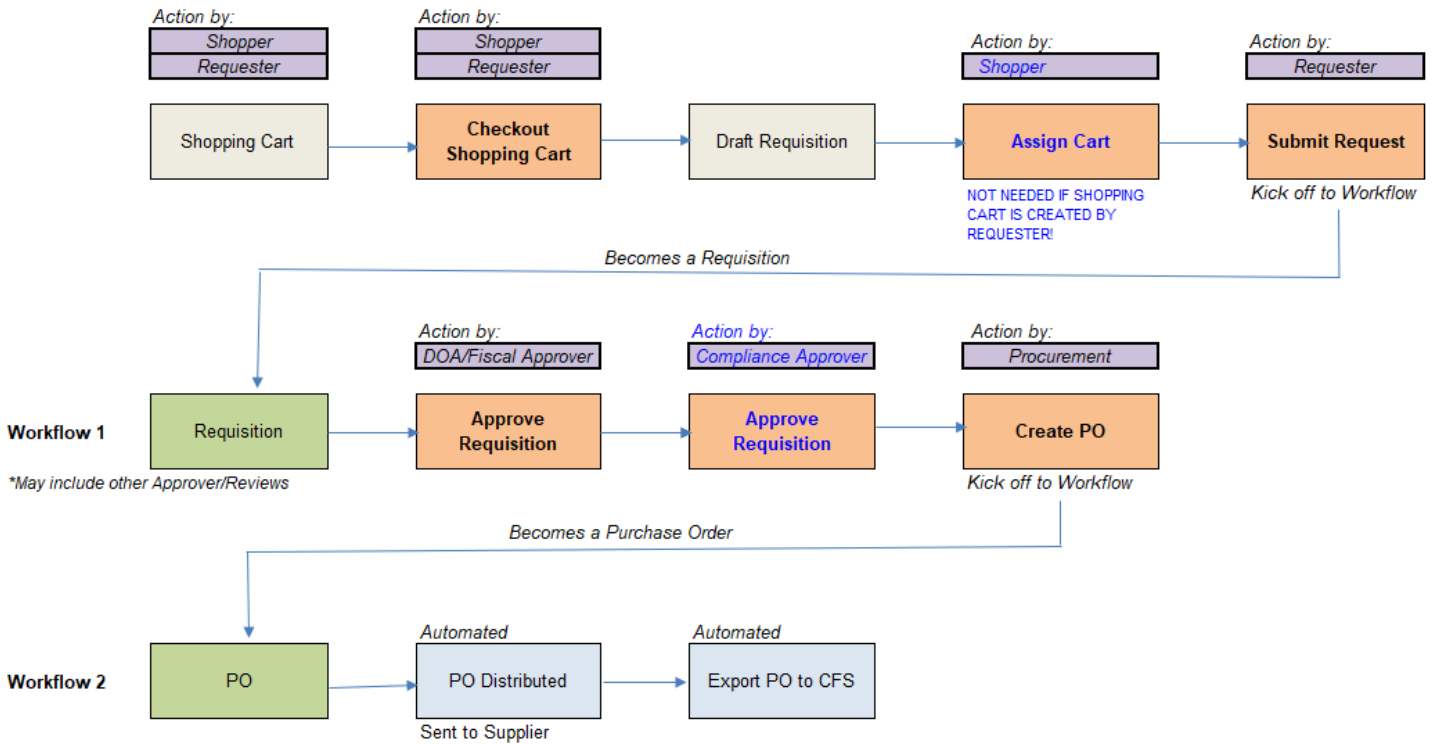


4-WORKFLOW: LIFECYCLE OF A PURCHASE

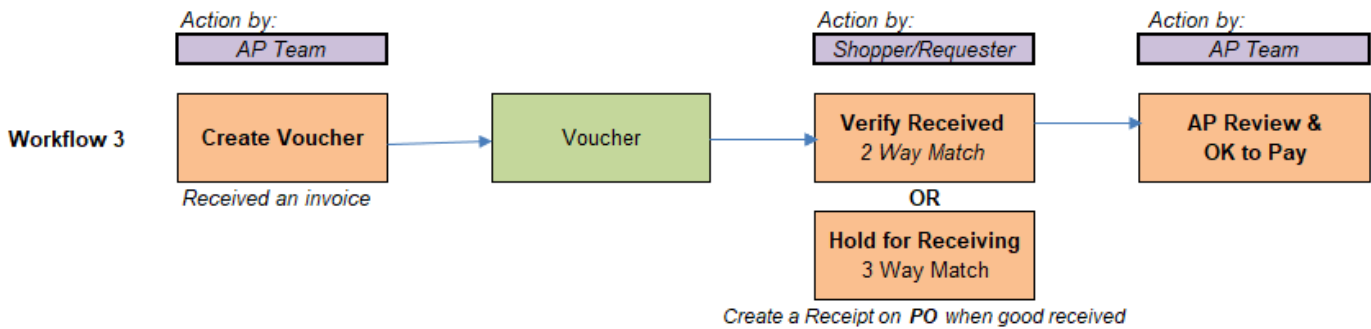
Once the Shopping Cart is submitted to Workflow by the Requester, the Shopping Cart becomes a Requisition and goes through approvals to become a Purchase Order. All three workflows are visible in CSUBUY.

Key:

Role
Action Taken
Document in Workflow
Blue Font: Based on the Situation

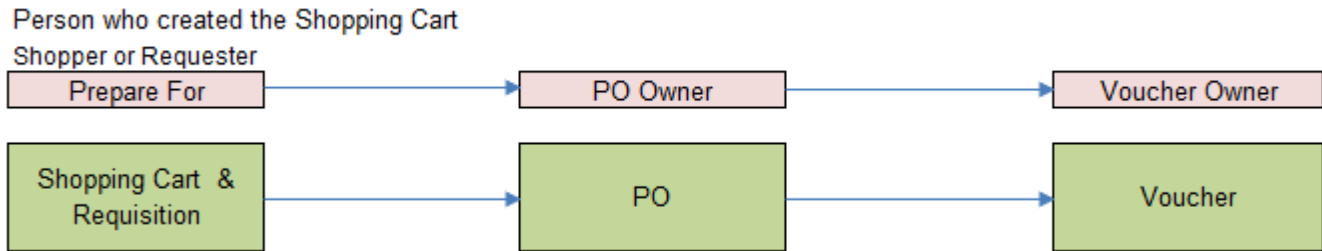


Finally, an invoice is received so that a voucher is created kicking off Workflow 3. Once verification of the receipt of goods or service has been completed, payment is made.



ONE PERSON BUT MULTIPLE IDENTITIES

The *Requisitioner* becomes the Prepared for and By, PO and Voucher Owner if they initiated the cart and completed the PO Process. If a *Shopper* initiated the cart and assigned it to the requisitioner, the shopper becomes the Prepared for, PO and Voucher Owner and the requisitioner becomes the Preparer (Prepared by). Important Note: The Prepared For person is responsible for verifying the receipt of the good or service.

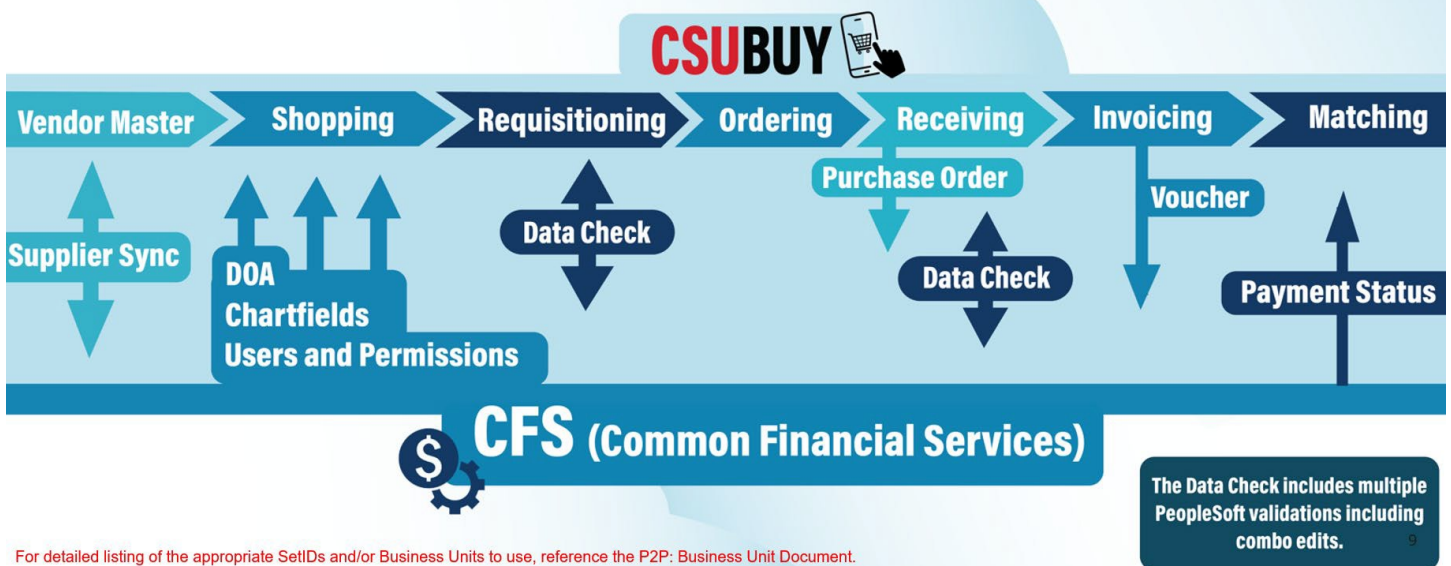


5-CFS AND CSUBUY

Some changes in process include the following:

1. Requisitions and Purchase Orders will no longer be created/initiated in CFS.
2. Requisitions in CSUBUY do not carry over to CFS or Data Warehouse. There will not be a corresponding Pre-Encumbrance.
3. The Purchase Order will carry over into CFS and the Data Warehouse.
4. CFS will still hold historical information on Purchase Orders created prior to the CSUBUY implementation.
5. Suppliers are set up in CSUBUY.

HOW DOES DATA FLOW BETWEEN CSUBUY AND CFS?



For detailed listing of the appropriate SetIDs and/or Business Units to use, reference the P2P: Business Unit Document.

CHAPTER 1: PROFILE SETUP – PERSONAL, DEFAULTS, AND NOTIFICATIONS

1-PERSONA

Before shopping, please ensure you are in the correct Persona.

Your Profile includes a Persona setting. A Persona indicates the Business Unit from which you are shopping. CSULB has the following Persona available:

- LBXMP – CA State University Long Beach
- LBX49 – Long Beach State Foundation (restricted use)
- LBXDN – CSULB Research Foundation

If you shop for multiple Business Units, always ensure that you are in the correct Persona before shopping.

- Personas allow users to shop from different business units.
- Personas are assigned in CFS and pass through the CSUBUY through an automated system integration.
- All users will have all Assigned Shopping Personas, however, all persona may not be used by everyone.

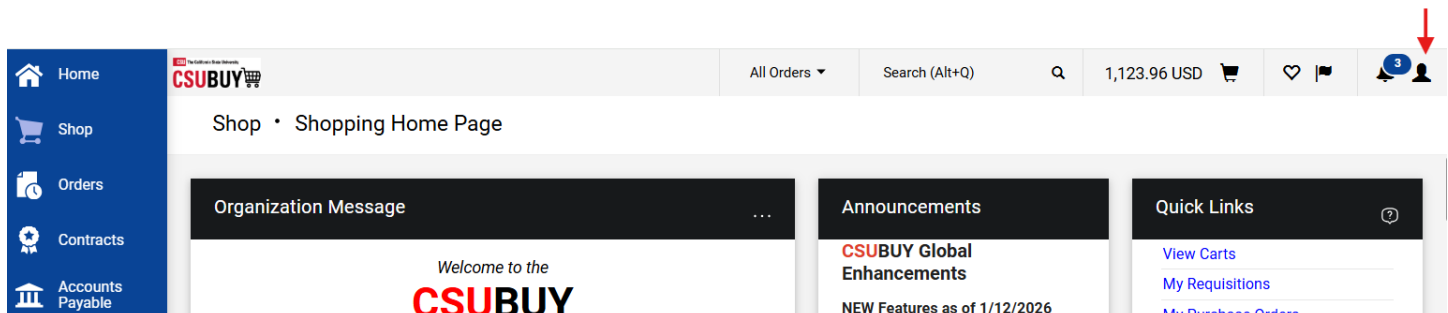
Warning, if the end user places orders on behalf of multiple Business Units (Personas), do not set default addresses or ChartFields in your profile. CSULB is not supporting the setup of default Personas or Chartfields as this time. Doing so may cause incorrect information to populate during checkout. If the wrong Business Unit is selected and the order makes it through the checkout process, it cannot be changed and the order will have to be rejected and started over using the correct Business Unit. Other ChartFields can be corrected via the requisition return process, just not Business Unit.

You may view your Persona in your Profile as shown below:

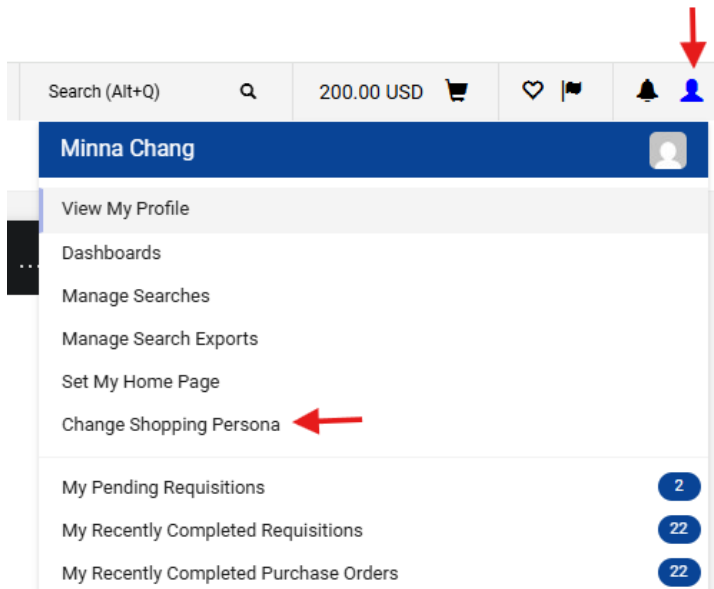
To navigate to this page simply click on your Profile Icon

Note:

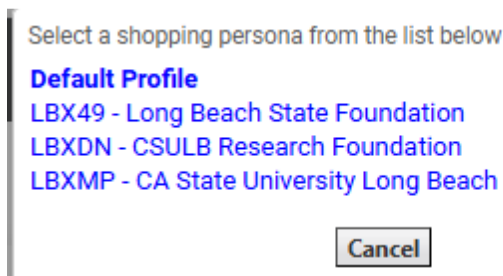
- **Heart icon** to the right contains your Bookmarked Pages.
- **Flag icon** has pending Action Items. A number will appear on the flag if there are pending items.
- **Bell icon** is the Notifications Page. A number will appear on the bell if there are unopened notifications.
- **Person icon** is your User Profile, where you can access your profile settings.



To change your Persona go to your **Profile** and select **Change Shopping Persona** as shown:

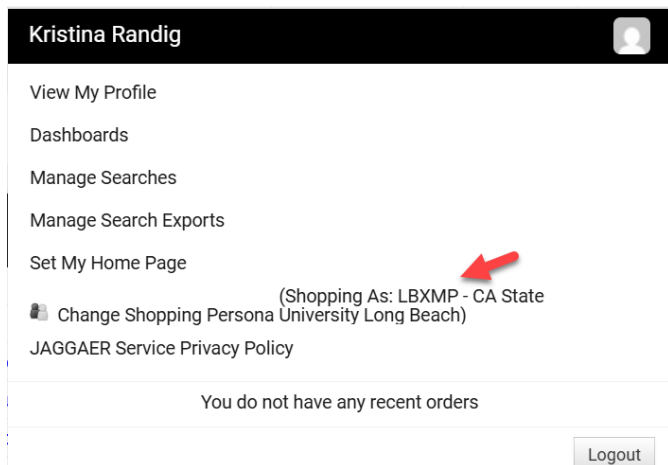


Then the following box pops up. Select the Persona you are purchasing for:



Note: only in rare instances is the LBX49 – Long Beach State Foundation Persona utilized. If you are shopping using LB49R funds, you would still select the LBXMP Person, later in the process you would use LB49R as the Business Unit when entering the ChartFields. In this instance, it is ok that the Persona and the ChartField Business Unit do not match. If you do use the LBX49 Persona and should have used LBXMP, the accounts payable department will be notified and they will contact you and you will be asked to resubmit your requisition using the correct Persona.

Once you make the selection, you will see the Persona appear as shown:



Important Note regarding Persona:

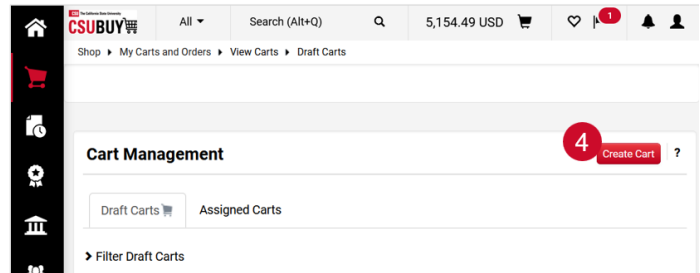
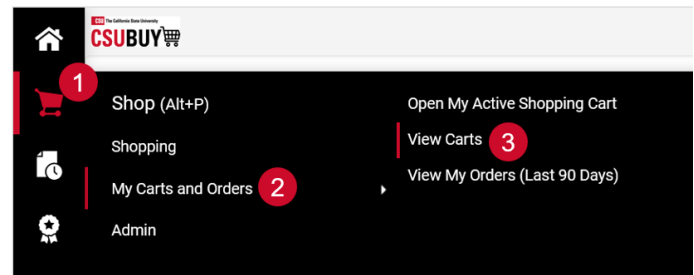
When you **change your shopping persona**, always create a new cart.

- If you don't, it can cause errors in your requisition.

Before You Start:

- Go to **Shop**.
- **My Carts and Orders**
- **View Carts**.
- Select **Create Cart** to start fresh.
 - Or **empty your current cart** before shopping.

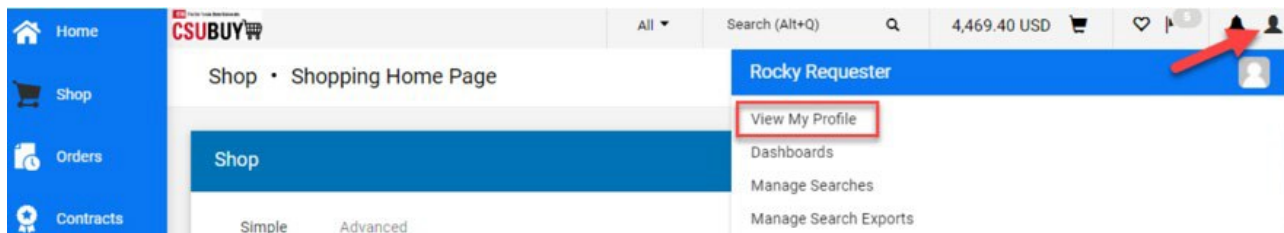
CSU The California State University



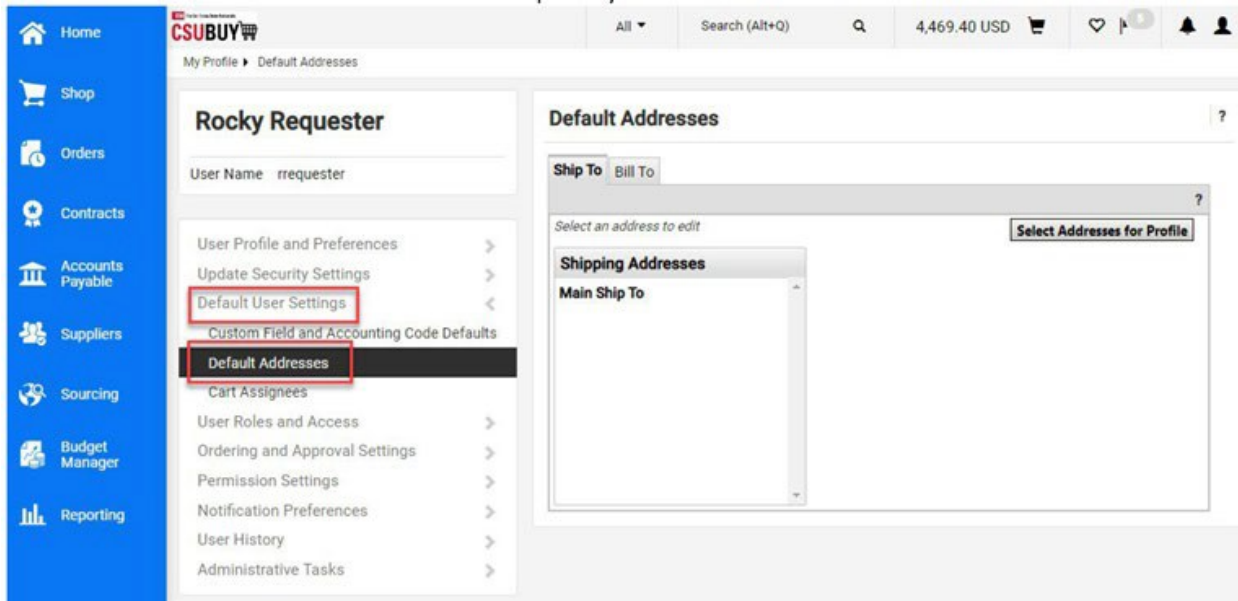
2-SHIP TO AND BILL TO ADDRESS DEFAULT SET UP

When you Checkout the shopping cart, you are required to select a Ship To and Bill To address. (the checkout action creates a Draft Requisition.) When setting a default, these addresses will automatically populate at Checkout. You could also change the addresses on the Draft Requisition, if needed.

1. From the Shopping Home Page, click on User Profile icon.

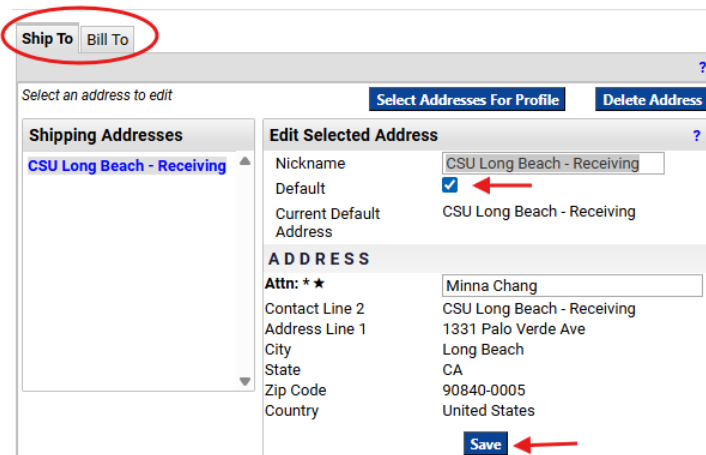


2. Once you click on User Profile, the following appears. Navigate to Default User Setting: **Default Addresses**



3. Select the **Ship To** tab or the **Bill To** tab as shown below.
4. Select the address you want as your default address.
5. Click on the **Default** check off box.
6. Click on **Save**

Default Addresses



For LBXCMP and for LBX49, the default address should be CSU Long Beach – Receiving. For LBXND, only if you are an employee of the Foundation (receiving a Foundation paycheck) and work in the foundation building would you select the Research Foundation delivery address. The use of LBXND would be very limited and used by a select few.

It is within the shopping cart, using the **Deliver To** Location where you specify a building and room on campus. You may search by clicking on the magnifying glass.

There is **no default** available for Deliver To but in most cases, the Deliver to Location will populate **based on what you used last**.

Shopping Cart • Shopping Cart

Go to: [Favorites](#) | [Forms](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#)

Simple [Advanced](#)

Search for products, suppliers, forms, part number, etc.

Cart Name

2025-11-12 40000961994 01

Deliver To Location

BH-155_LBCMP



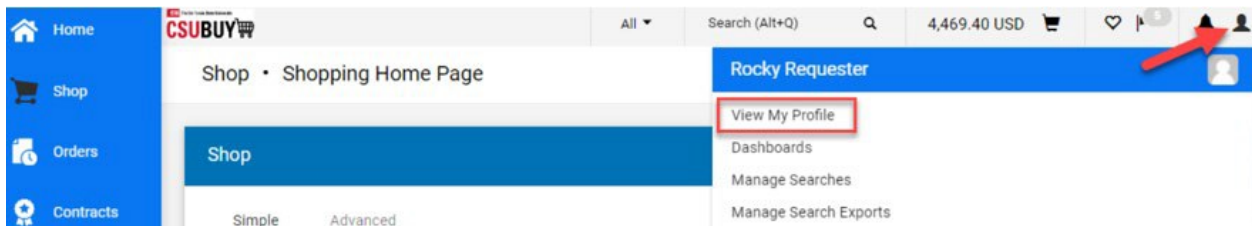
3-CART ASSIGNEES

A Shopper must assign their Shopping Cart to a Requester when they have completed shopping so that the Requester can submit the Shopping Cart to workflow.

A Shopper or Requester may also assign a Shopping Cart to another Shopper or Requester. This is useful, for example, when the original Shopper/Requester plans to be out of the office and would like someone else to have access to the cart so they can complete the checkout when the purchase is ready.

To make it easier to find the person to assign the Shopping Cart, set up the Cart Assignees.

1. From the Shopping Home Page, click on View My Profile icon.



2. Navigate to Default User Setting: Cart Assignee

Minna Chang

User Name 40000961994

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

User's Name, Phone Number, Email, etc.

First Name Minna

Last Name Chang

Phone Number

Mobile Phone Number

E-mail Address * minna.chang@csulb.edu

Business Unit LB - CA State University Long Beach P2P (LBXMP)

Authentication Method SAML

User Name * 40000961994

★ Required

3. Click the Add Assignees box.
4. A User Search box will pop up to enter a search criterion to locate the cart assignee, click Search.
5. Locate the user from the list and click the select link from the Action column.
6. To designate a preferred approver, click the Set as Preferred button to make the user the default approver for your orders.

Cart Assignees


Add Assignee... ←


My Cart Assignees ?


Name	Action
Michael Pruitt	<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>
Mel(MaryEllen) Castillo	<input type="button" value="Set as Preferred"/> ← <input type="button" value="Remove"/>


BONUS INFORMATION: To find a list of individuals in a role, select the role, such as Approver, and then select Search. You will see a list of all those in that role.


User Search




Last Name 


First Name 


User Name 

Email 

Business Unit  LB: CA State University Long Beach P2P (LBXMP)

Role   

Results Per Page 



4-SETTING UP NOTIFICATION PREFERENCES

The recommendation is to keep the current default notifications EXCEPT the Shopper/Requester should ensure Verify Receipt and Create a Receipt Notifications are ON. (See instructions below to turn ON Verify Receipt and Create a Receipt.)

If you feel you are receiving too many notifications, please reach out to us to assist you in adjusting your notifications.

Notifications are available via email and/or within CSUBUY's Notifications "bell."



To adjust Notifications:

1. Click on View My Profile
2. Navigate to **Notification Preferences**
3. Select **Shopping, Carts & Requisitions**
You may also select any of the other options shown below to set notifications.
4. Click on the blue **Edit Sections** at the right corner.
5. Click on **Override** on the field you want to update.
6. Select the type of notification you would like to receive in the dropdown.
7. Click Save Changes.

Minna Chang
User Name 40000961994

User Profile and Preferences >
Default User Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences <
Administration & Integration
Shopping, Carts & Requisitions
Change Requests
Purchase Orders
Accounts Payable
Receipts
Contracts
Sourcing Director
Supplier Management
Form Requests
User History >
Administrative Tasks >

Notification Preferences: Shopping, Carts & Requisitions

Prepared By - Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Processed Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	Email
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Ad-Hoc Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Sourcing Event created from Requisition	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
PR created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
Cart created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification

Save Changes **Cancel**

Notification Preferences for Shopper/Requester to Verify Receipt & Create a Receipt

The Shopper/Requester are required to Verify Receipt or Create a Receipt for every purchase indicating that the good or service has been received. Turning on notifications for these actions is a reminder and notification for the Shopper/Requester.

For **Verify Receipt**, the Shopper/Requester must turn on the following notification to receive an email as a reminder that a particular action is needed to keep the process moving forward.

Select Notification Preferences>Accounts Payable. Then click on Edit Section (pencil icon in the right corner).

Minna Chang
User Name 40000961994

User Profile and Preferences >
Default User Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences <
Administration & Integration
Shopping, Carts & Requisitions
Change Requests
Purchase Orders
Accounts Payable
Receipts

Notification Preferences: Accounts Payable

Voucher submitted into Workflow	None
Voucher Workflow Notification available	None
Voucher pending Workflow approval	Email & Notification
Voucher Workflow complete	None
Voucher line item(s) rejected	Email & Notification
Voucher rejected	Email & Notification
Voucher returned	None
New Message - Payment	None
New Message - Voucher	None

Select Override for Voucher Requires Receipt notice.

In the drop-down menu, select Email & Notification. Then click on Save Changes.

NOTE: Emails will be generated daily until the action is resolved.

Notification Preferences: Accounts Payable

Voucher submitted into Workflow ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Voucher Workflow Notification available ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Voucher pending Workflow approval ?	<input type="radio"/> Default	<input checked="" type="radio"/> Override	Email & Notification ▾
Voucher Workflow complete ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None

For **Create a Receipt**, the Shopper/Requester must turn on the following notification to receive an email as a reminder the action is needed.

Select Notification Preferences>Receipts. Then click on Edit Section.

Minna Chang
User Name 40000961994

User Profile and Preferences >
Default User Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences <
Administration & Integration
Shopping, Carts & Requisitions
Change Requests
Purchase Orders
Accounts Payable
Receipts

Notification Preferences: Receipts [Edit Section](#) ?

PO Requires Receipt notice ?	None
Voucher Requires Receipt notice ?	None
Receipt reminder notification ?	None

Select Override for Voucher Requires Receipt notice.

In the drop-down menu, select Email & Notification. Then click on Save Changes.

This will be a reminder in your email that when you receive the product, you must create a receipt.

Notification Preferences:

Receipts

PO Requires Receipt notice Default Override None

Voucher Requires Receipt notice Default Override Email & Notification

Receipt Requires Receipt notice Default Override None

Email notification that the voucher requires a receipt

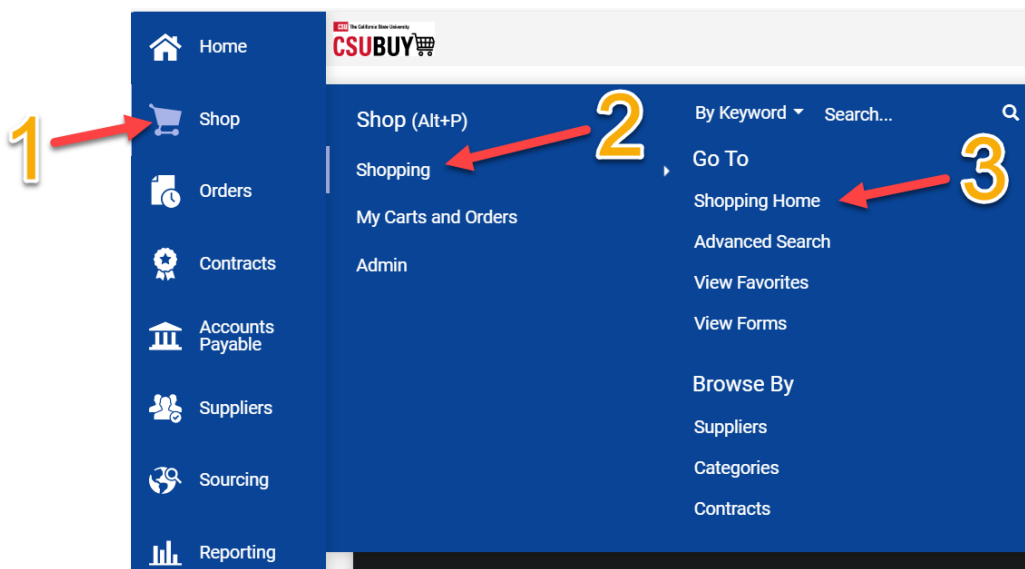
[Save Changes](#) [Cancel](#)

CHAPTER 2: SHOPPER/REQUESTER

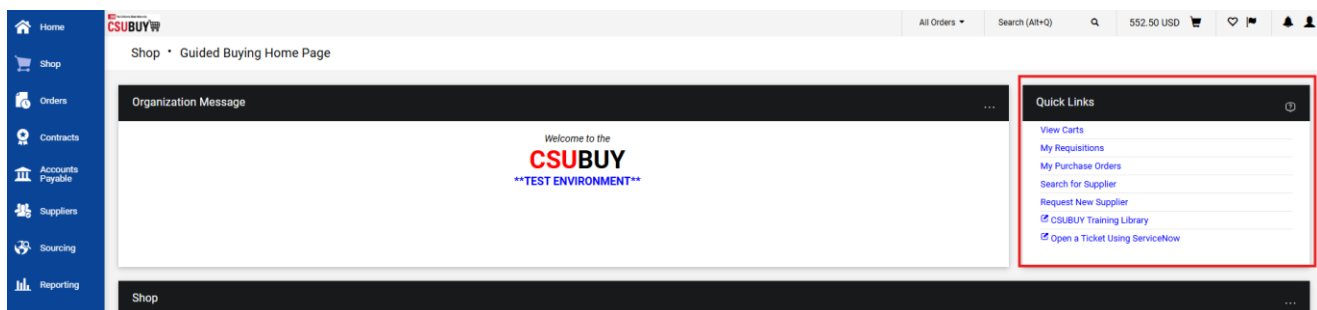
1-SHOPPING HOME PAGE NAVIGATION

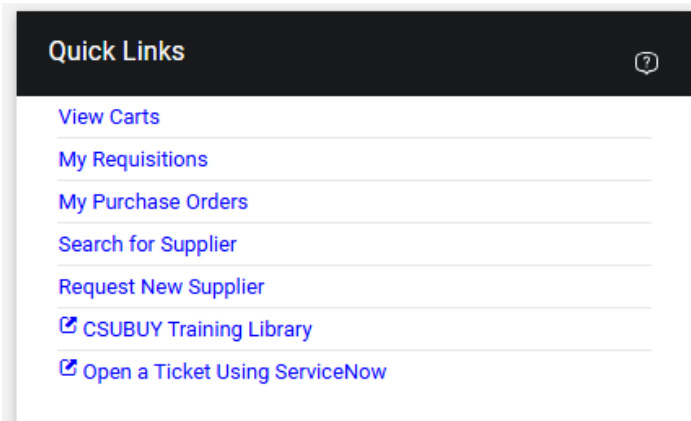
The CSUBUY Home Page differs depending on your role. A Shopper/Requester's Home Page will be the Shopping Home Page.

If you need to navigate to the Shopping Home Page, go to Shop > Shopping > Shopping Home



To the right, there is a Quick Links section. This provides links that could be described as "My Stuff" along with other useful links.

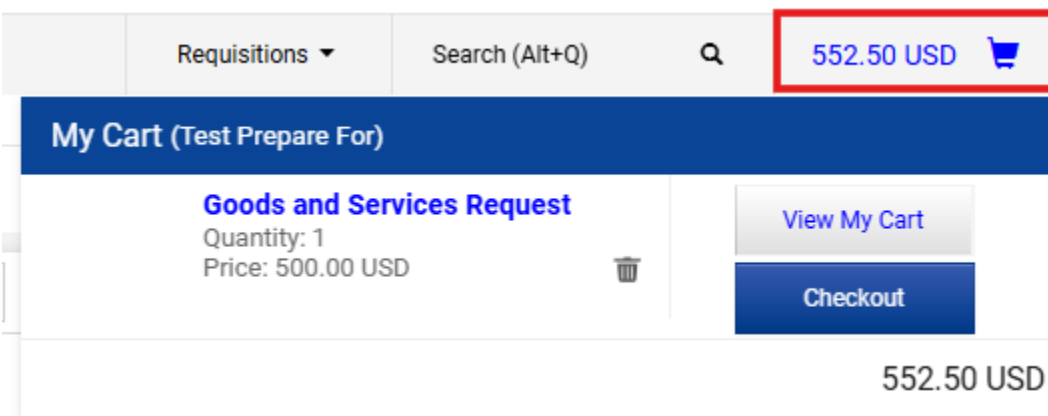




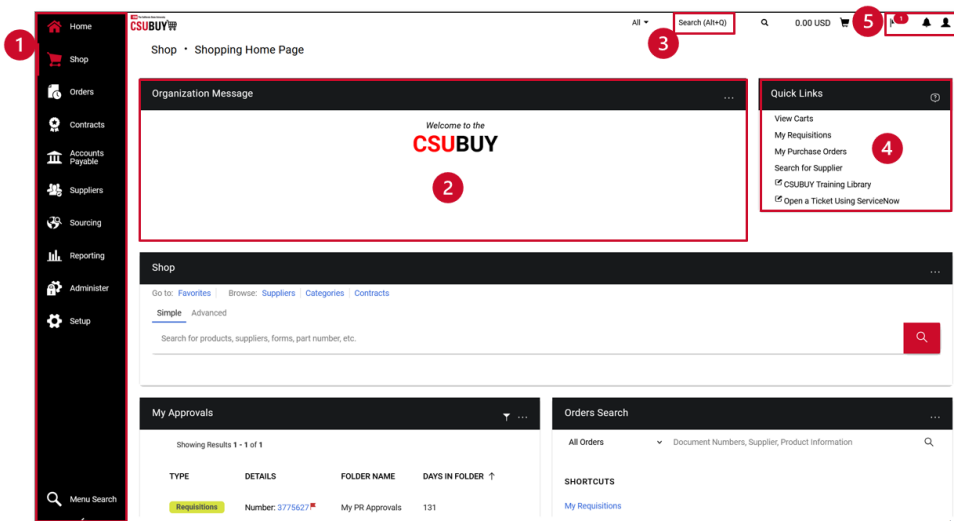
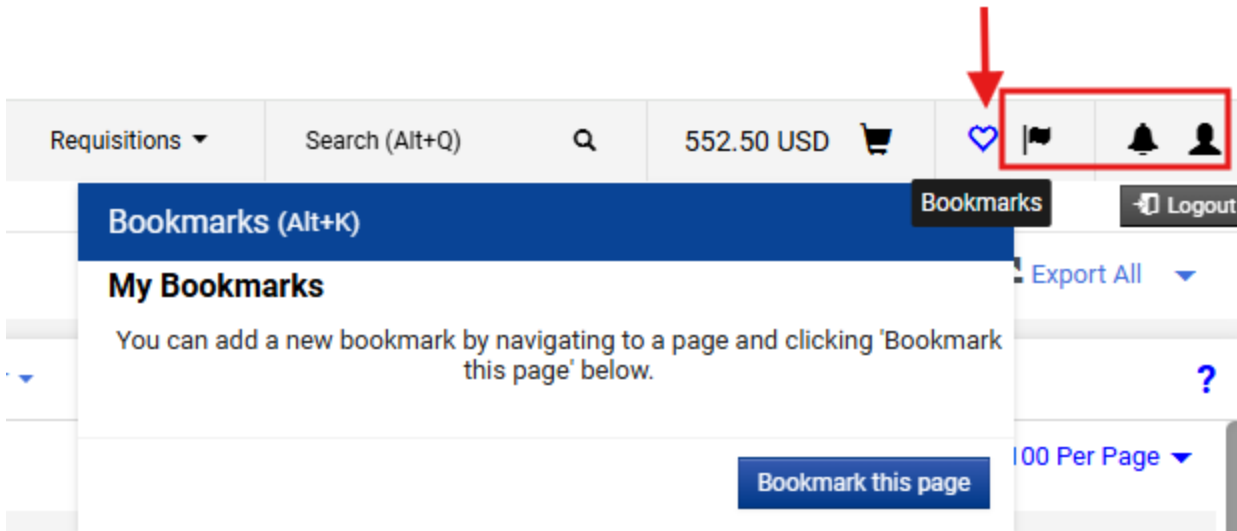
At the top right corner, you will notice the following icons and search bars. The drop down has selections similar to the flyouts. Select the type of document you are searching for and then enter a search criterion such as number, supplier name, prepare for, etc.



Shopping Cart icon: where you can view your Shopping Carts.



- **Heart icon** to the right is your Bookmarked Pages.
- **Flag icon** has pending Action Items. A number will appear on the flag if there are pending items.
- **Bell icon** is the Notifications Page. A number will appear on the bell if there are unopened notifications.
- **Person icon** is your User Profile, where you can access your profile settings.



1. Flyout
 - Full **CSUBUY** Navigation
2. Organization Message
 - A dashboard widget that contains both campus specific messages and system wide updates
3. Quick Search
 - Can be used as a quick search for documents and suppliers
4. Quick Links
 - A navigation widget with links to frequently used areas of **CSUBUY**
5. Action Items
 - Notifications And access to the user profile.

2-BEFORE SHOPPING: VERIFY PERSONA AND EMPTY SHOPPING CART

Verify Persona

Confirm that you are in the correct Persona for the entity for which you are shopping.

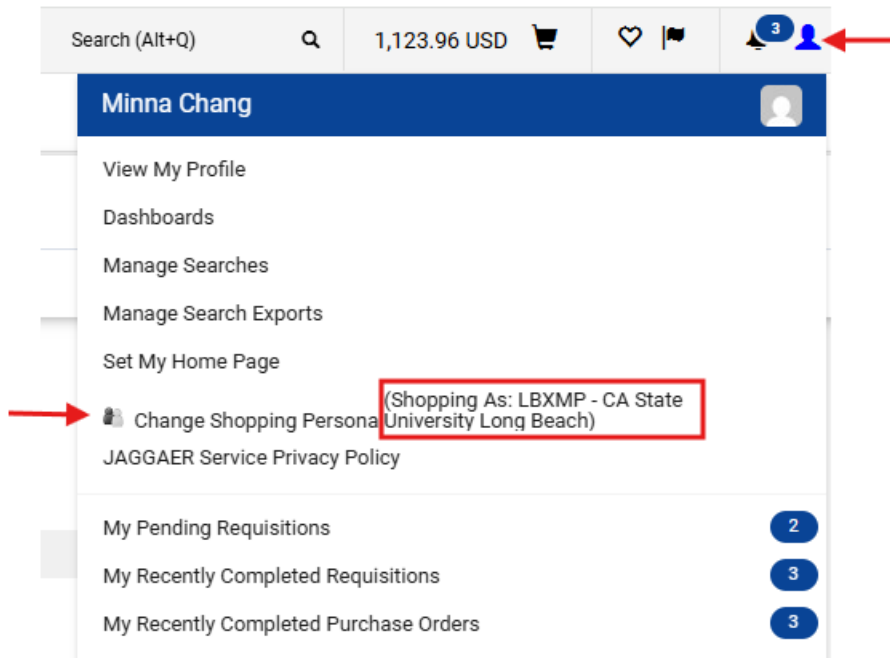
Entity	Persona
CSULB Campus	LBXMP – CA State University Long Beach Persona
Research Foundation	LBXFD – CSULB Research Foundation
Long Beach State Foundation	LBX49 - (restricted use)

For all transactions related to Business Units LBCMP and LB49R, use LBXMP persona to make your purchase.

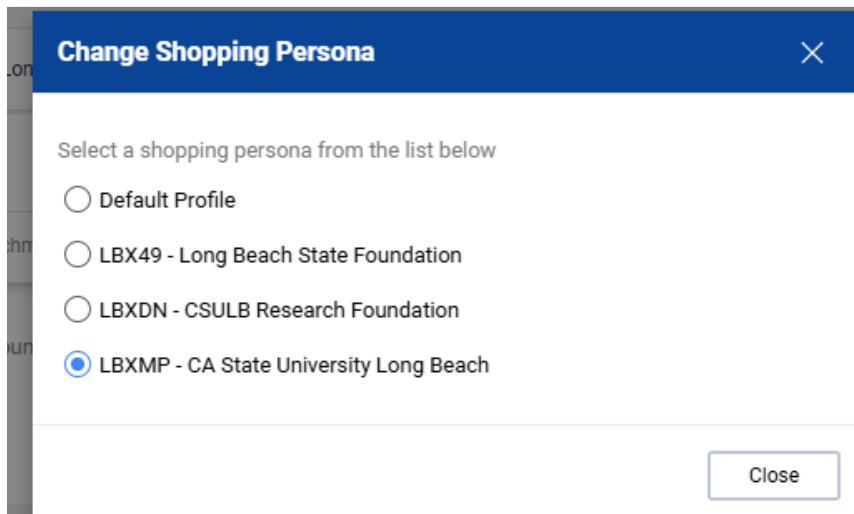
If your Business Unit in the ChartFields for funding purposes is a LBX49, your persona should still be LBXMP.

Verify that you are in the correct Business Unit in your User Profile.

Note: First question to always ask yourself is “What Business Unit am I in?” This is the only point where the Business Unit can be corrected. If the wrong business unit is selected and the shopping cart is generated, the shopper will have to have the cart rejected and will have to start the order all over. The Persona drives who is responsible for tasks further in the process, i.e., reviewer and approver.



If you need to change the entity you are shopping for, click on Change Shopping Persona and select the correct Shopping Persona.

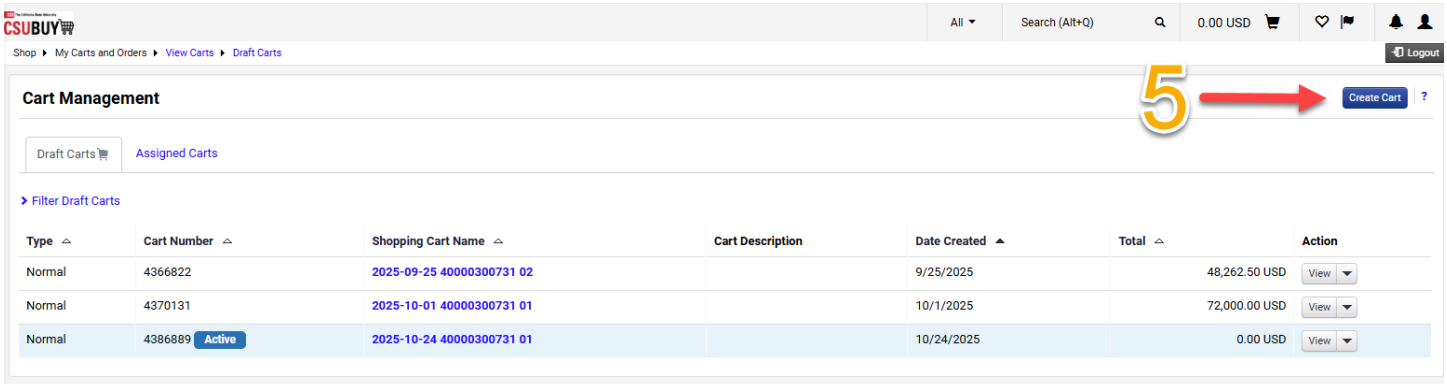
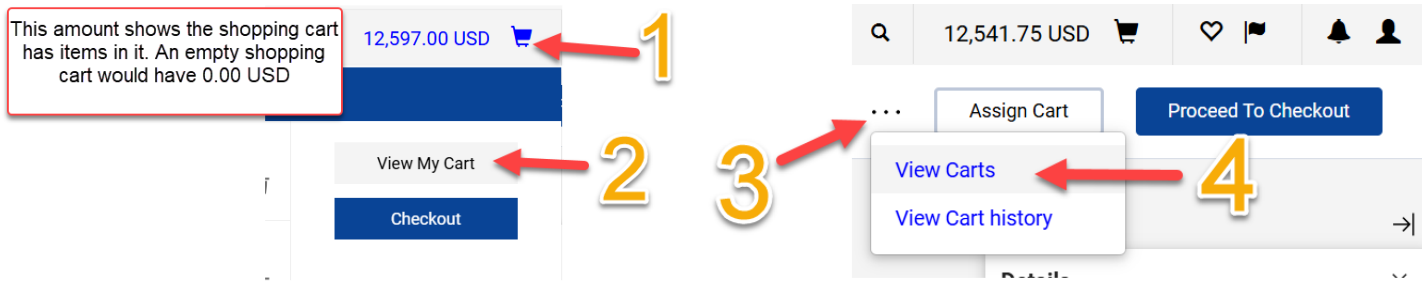


Confirm Your Shopping Cart is EMPTY

Your cart must be empty before you begin shopping.

1. Click on the shopping cart icon in the top right corner.
2. Select **View My Cart**. If the cart has items in it, you must save it as a draft to start a new shopping cart.
3. Click the 3 dots in the upper right corner.
4. Select **View Carts**. Then select the Draft Carts tab.

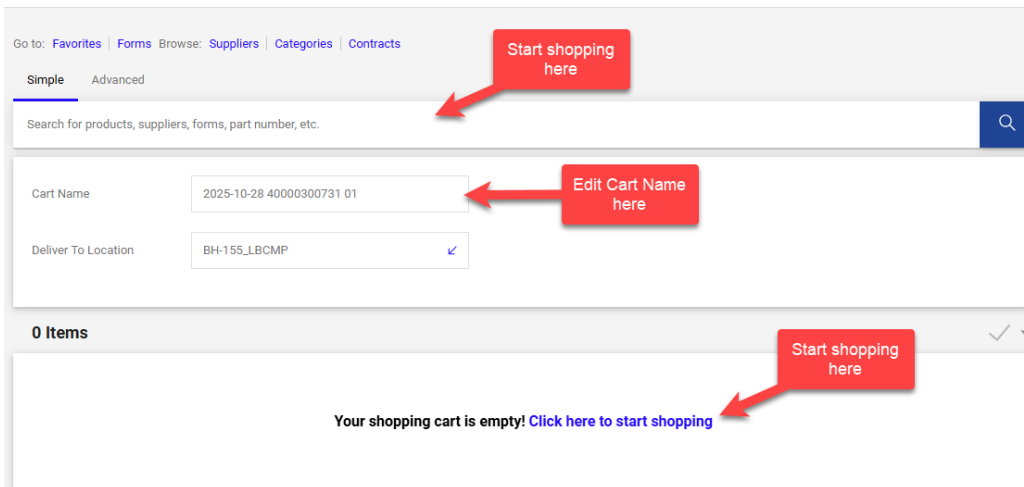
5. To the right of the page select **Create Cart**.



Now you have an empty cart and can start shopping!

To see your drafted carts, go to Shop > My Carts and Orders > View Carts > Draft Carts.

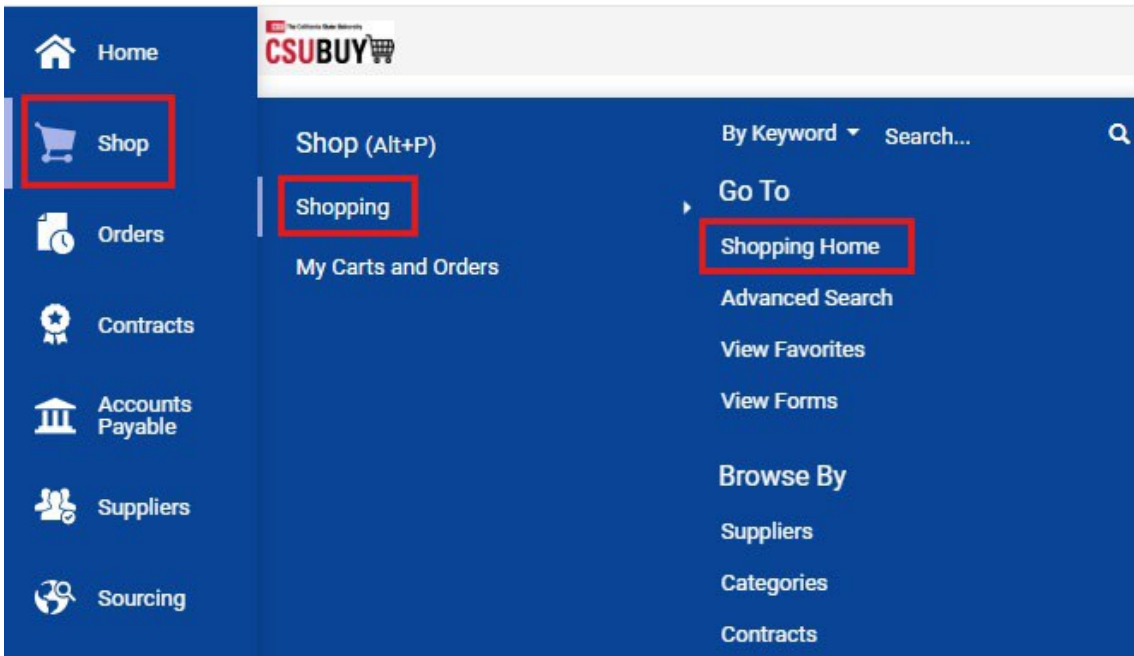
Shopping Cart · Shopping Cart



3-PRODUCT SEARCH

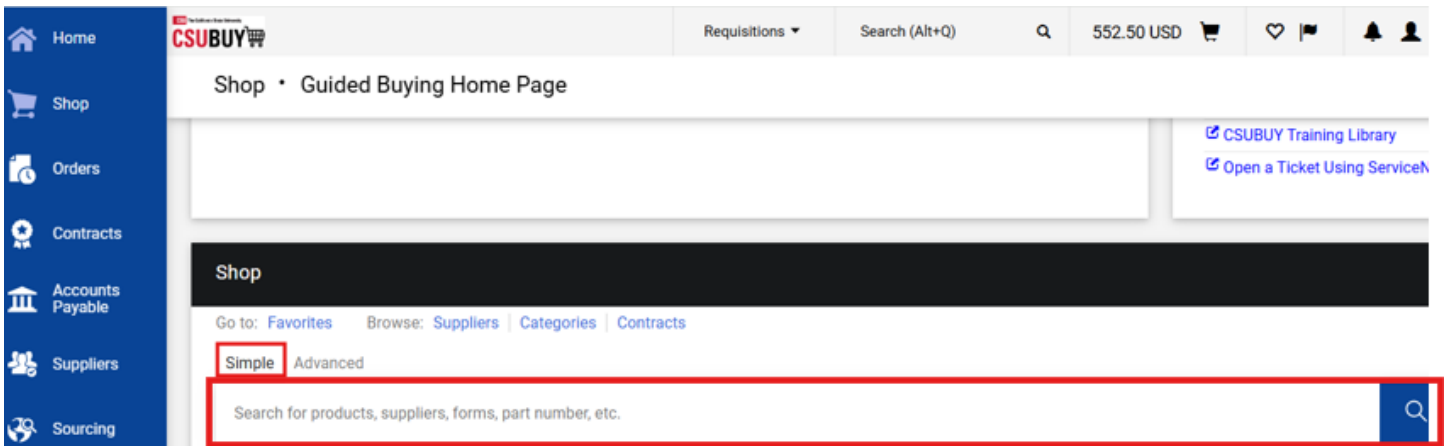
To begin shopping, you may start with a product search. This will provide products options and prices to compare. There are some PunchOut Catalogs items (such as Amazon and Staples) that DO NOT appear when using the Product Search feature in CSUBUY. You must go to the PunchOut Catalog and search in the catalog separately.

Navigate to the Shopping Home Page.

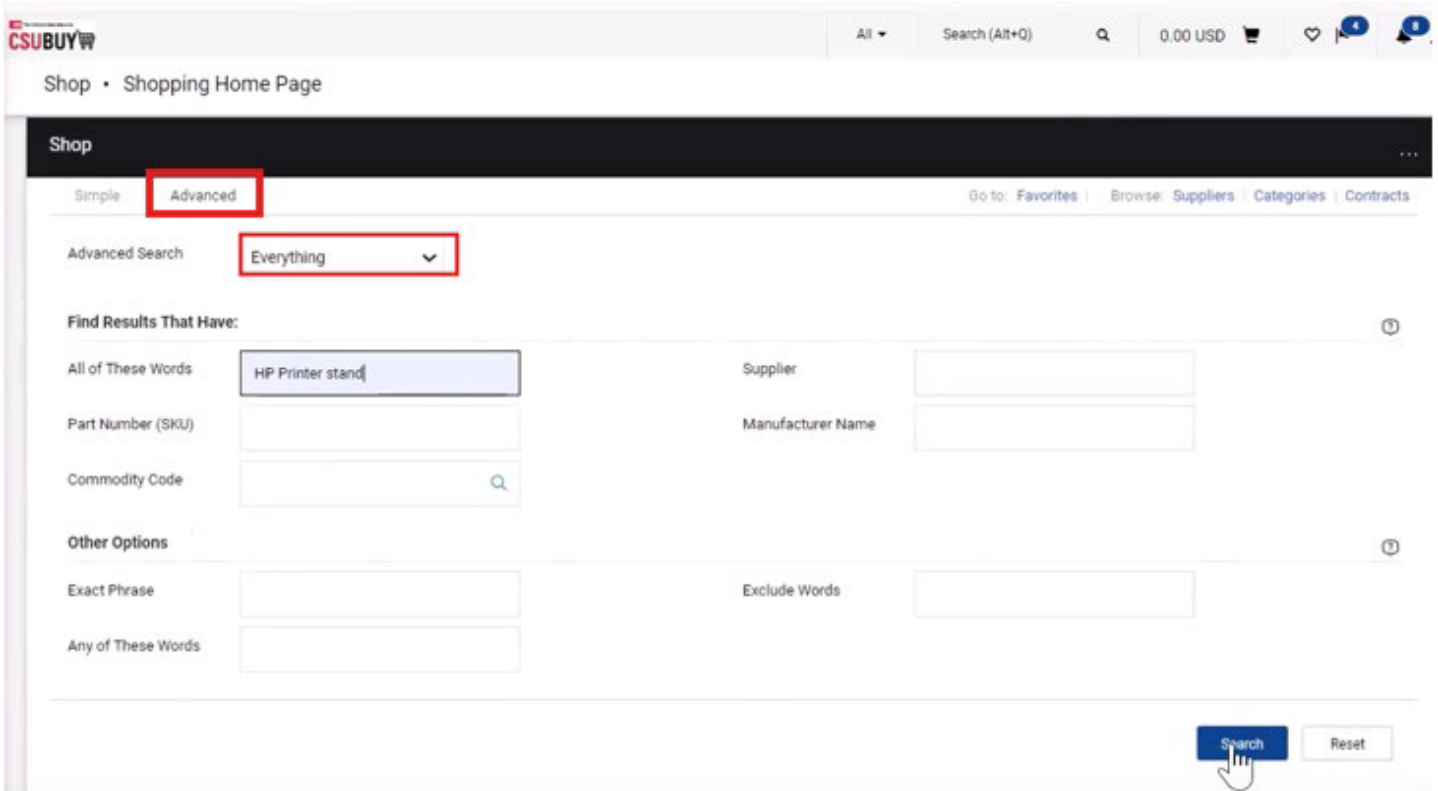


Simple and Advanced Product Search

Simple search is useful if you have minimal specific information and would like a general search for a product. Type the product in the search bar.



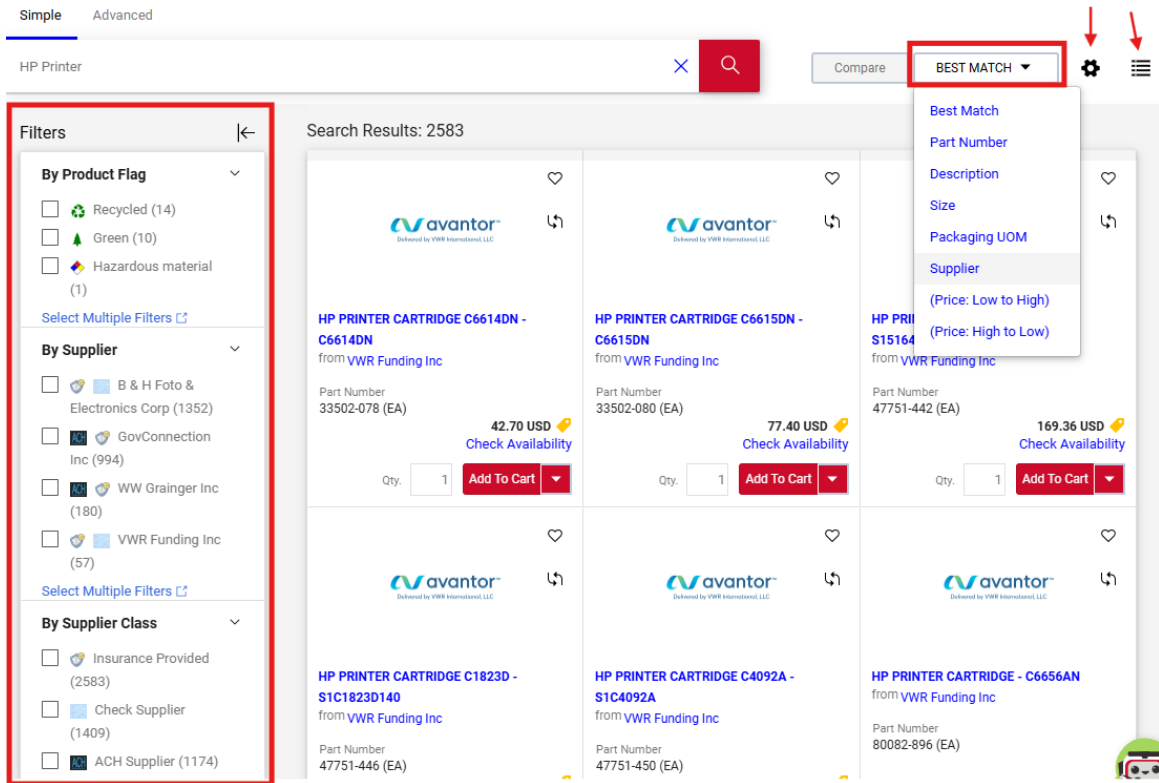
Advanced search is useful if you have information regarding a product and would like to narrow your search by adding search criteria. The drop-down menu allows you to search by a product type such as furniture.



Filtering Search Results

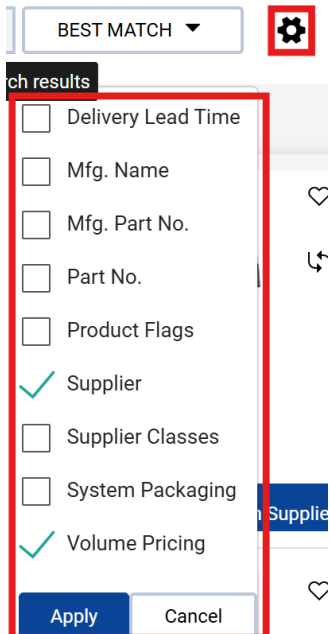
The Search Results appear as shown below.

- **Filters** – Seen on the left, allows you to narrow your search.
- **Drop-down menu** – Allows you to sort the search results according to the criteria you select.
- **List icon** – Allows you to select if you would like to see the search result as tiles (shown below) or as a list.



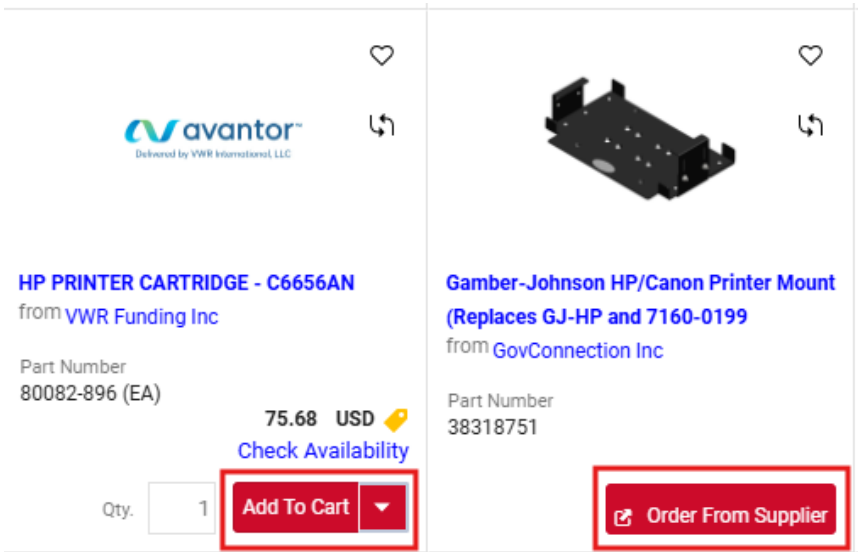
*Staples appeared in the test environment but not in production (live CSUBUY)

Gear icon – Allows you to select what information you would like to see in the Product Search results.



Search Results & Ways to Add to Shopping Cart

The search results will provide three separate ways the product is added to the Shopping Cart depending on the Supplier.



Order from Supplier – When clicking on the box, you will be punched out to the Supplier website. You would then search for the product and add it to the Supplier cart. Once you check out, you will then be punched back into CSUBUY with the item in your Shopping Cart. This type of Supplier is known as a PunchOut Supplier. PunchOut Suppliers also have a PunchOut Catalog in CSUBUY. PunchOut Catalog is covered in [Section 4-Adding Items to a Shopping Cart: PunchOut Catalog](#)

Add to Cart – When clicking on the box, the item will be added to your Shopping Cart.

4-ADDING ITEMS TO A SHOPPING CART: USING PUNCHOUT CATALOGS

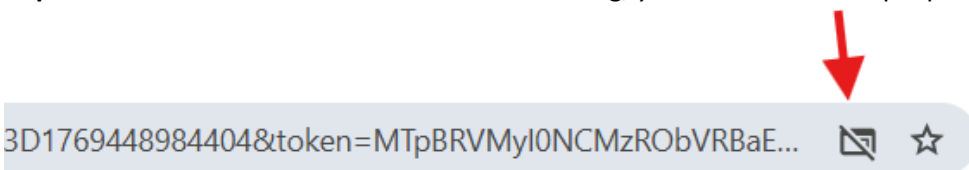
There are catalogs from different suppliers (PunchOut suppliers) such as Staples and Amazon, which you access by clicking on their tile found in the Shopping Home Page. When clicking on their tile, you will be “punchedout” to their site and are then able to search for the product and add to the Shopping Cart.

Benefits to using a PunchOut catalog:

- User receives the latest pricing and availability.
- No need to maintain the catalogue in CSUBUY, the catalogues are maintained by the vendors.
- Provides for a faster and easier ordering experience.
- Items are pushed into CSUBUY for approval and payment.
- Eliminates the need to reconcile the purchase on your PCard.
- Purchase will show up sooner in the Data Warehouse, first as an encumbrance and then actuals once the item has been vouchered.

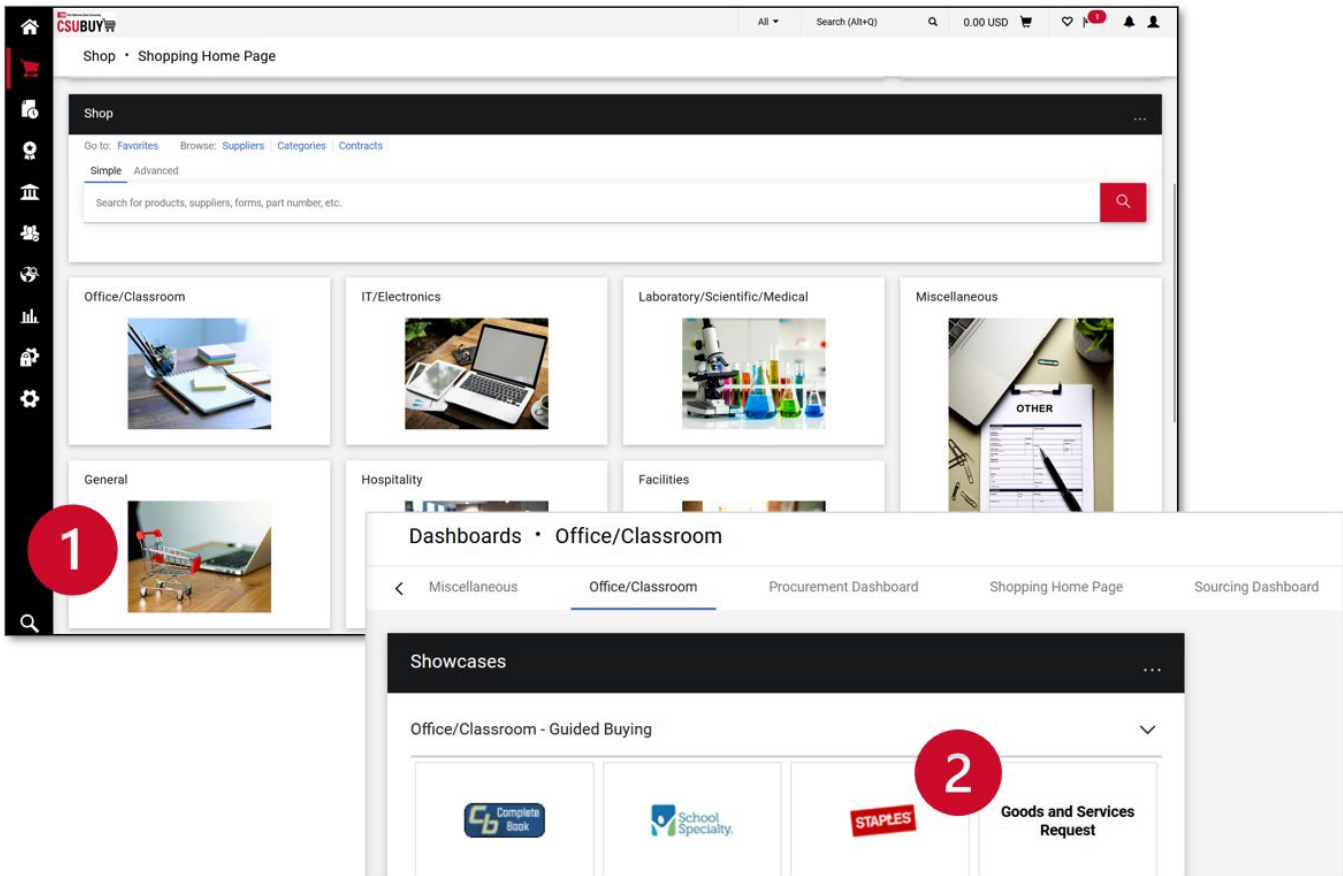
BEFORE USING AMAZON PUNCHOUT, please see Chapter 6, Section 4-Amazon Accounts and Access.

Important Note: For the Amazon PunchOut Catalog, you must remove Pop-Up Blockers as seen below.



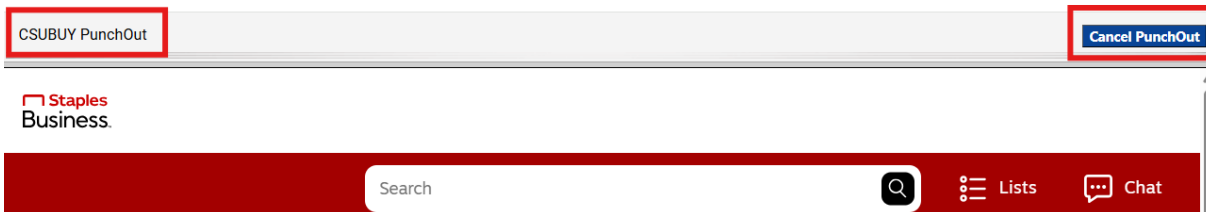
Click on the Pop-Up Blocker and then select Allow.

To shop using a PunchOut Catalog, go to the (1) Shopping Home Page and go to the (2) Showcase section to select from the PunchOut Catalog.



After selecting a supplier, you will be redirected or punched out to the supplier's website.

You will notice at the top of the site, you are in a CSUBUY PunchOut. You could click on Cancel PunchOut if you do not want to add any items to your cart and this will take you back to CSUBUY.




Here, you can search for the items and then click **Add to Cart**.



You will then have an opportunity to add more items or Review and Checkout. **Make sure your order is correct as you will not be able to make adjustments to the order once you Submit Order.** Also, in a PunchOut, the quantities cannot be changed, user will be directed back to CSUBUY. Once back in CSUBUY, you can increase the quantity by adding another line of the item you want (or deleting the line and re-entering the line for the correct quantity). If you want to decrease the quantity, you will have to delete the line in the shopping cart and then add a line for the correct quantity you want to have.

At Checkout you would review and then submit the order.

Review & Checkout


[Print Cart](#)
[Print Quote](#)

Order Summary

Items (2)	\$103.83
<hr/>	
Total	\$103.83

✔ You're saving \$76.70 on this order!

Delivery to: [Long Beach, CA 90808](#)

Submit Order

You will then be punched back into CSUBUY with the item in your Shopping Cart. If you realize you need to adjust the order, you may delete the line item in your Shopping Cart and then go back to the Supplier PunchOut and select the correct item and add it to your Shopping Cart. (See Section 7-Shopping Cart Fields & Shopping Cart Management for instructions on deleting a line item.)

Note that each Supplier's site will be slightly different but the process of submitting an order and being punched back to CSUBUY is the same.

5-ADDING ITEMS TO A SHOPPING CART: USING FORMS

When you are unable to locate the Product from the PunchOut/Catalog Supplier, you would need to use a Form. Depending on the item you are purchasing, you would use one of the following Forms:

Note: User cannot mix forms due to the fact that workflow is driven by the form that is selected. Also, before selecting a form, make sure your cart is cleared and you have the correct Business Unit selected.

Goods and Services Request

- Goods – Other
- Services – other
- Classroom or Laboratory Supplies

- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

Facilities and Construction Request

- Utilize this form to initiate Facilities or Public Works Project

Hospitality Request

- Award or Service Recognition
- Farewell Event
- Venue
- Catering
- Morale Function
- Entertainment Services
- Participation Incentive
- Farewell Award
- Promotional Items
- Other

Independent Contractor Request

Utilize this form to initiate a request for services provided by an individual who is self-employed, guest speaker or guest lecturer. Note: If an independent contractor was established in CFS, and they are not in CSUBUY, you will need to submit a supplier request to re-establish them in CSUBUY.

IT Hardware Request

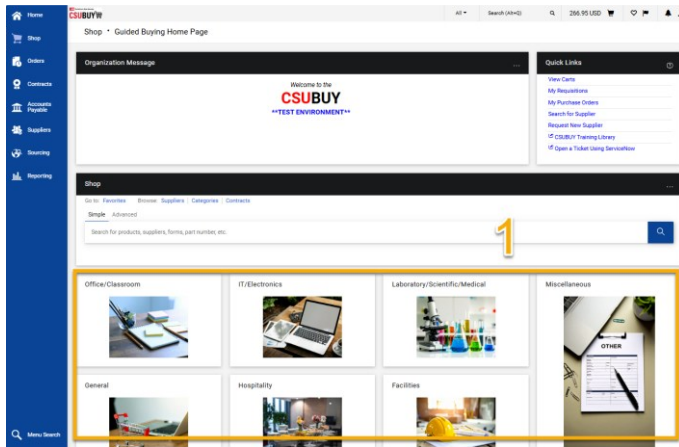
Utilize this form to initiate a request for IT Hardware and Accessories.

IT Software Request

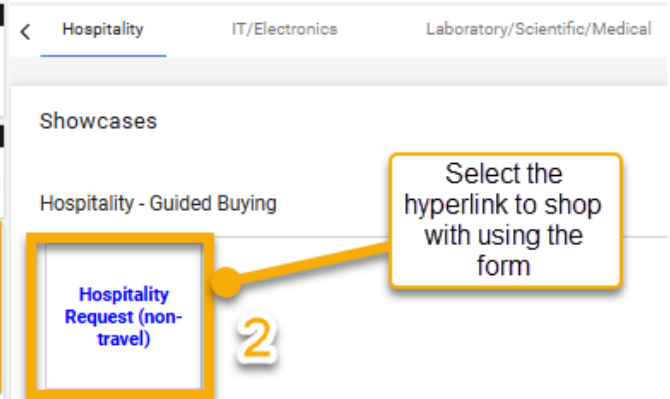
Utilize this form to initiate a request for IT Software or Cloud Services.

Finding the Form

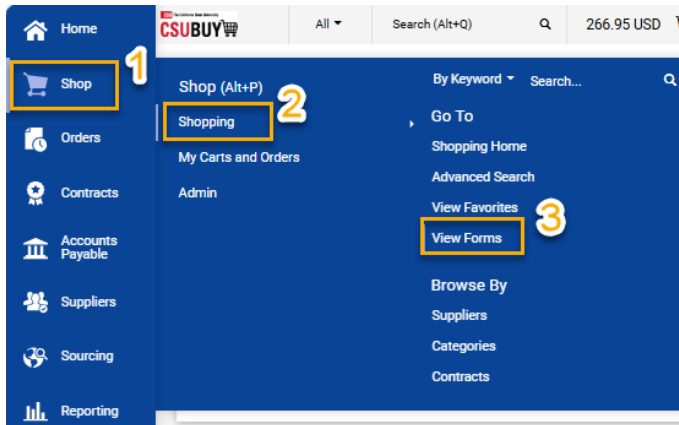
1. Go to the Shopping (1) Home Page and in the (2) Showcase section, select the Category of your product. Then go to the Form as shown.



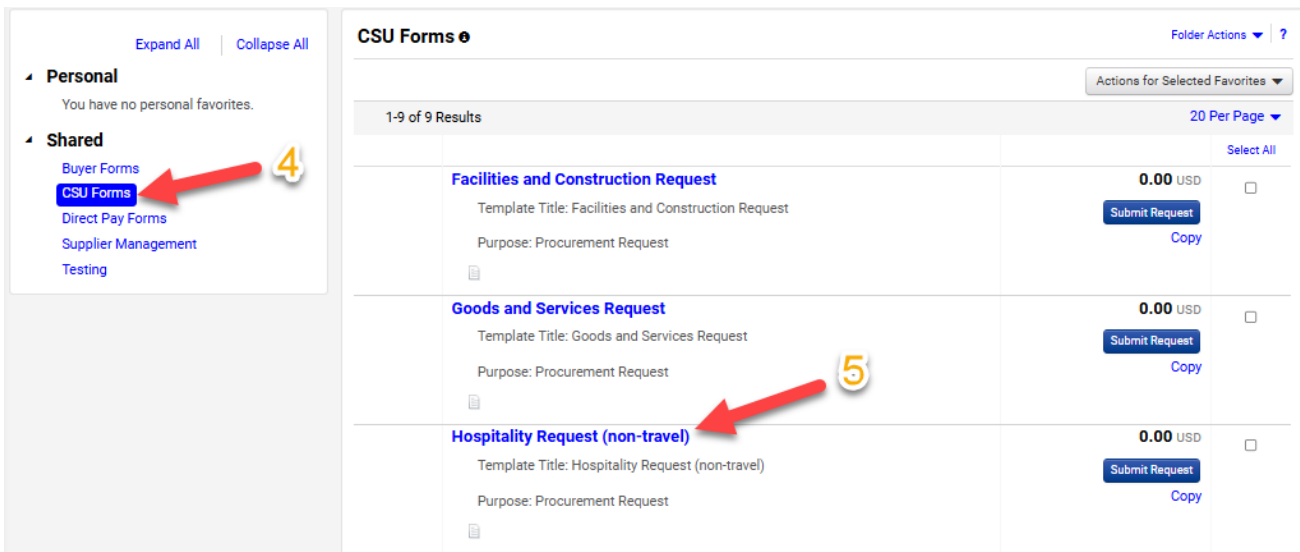
Dashboards • Hospitality



2. To quickly find a list of all the Forms available, use the flyouts and select View Forms.



You will then see the Forms available. Either click on the blue hyperlink or click on Submit Request.



Completing the Form

The Form will open, and you will see instructions on how to complete the Form as shown below.

Hospitality Request (non-t...

Form Number 1201566
Purpose Procurement Request
Status **Incomplete**

Instructions

Utilize this form to initiate a request for Hospitality (non-travel). Examples are:

- Award or Service Recognition
- Farewell Event
- Venue
- Catering
- Morale Function
- Entertainment Services
- Participation Incentive
- Farewell Award
- Promotional Items
- Other

This form should not be used if the request:

- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for Goods and Services (non-IT). See Goods & Services Request Form.
- Is for services provided by an individual who is self-employed, guest speaker, or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice.
 - Note: only applicable to campuses with Direct Pay.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Note: A supplier must be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this.

1 This area outlines the required information

2 Fill out each section and select 'Next' to complete the form

Request Actions | History | ?

Follow through the workflow, entering all necessary information. As you follow the prompt, you will have the opportunity to enter the Supplier, Item, and additional information about the product you would like to purchase.

Hospitality Request (non-t...

Form Number 1201566
Purpose Procurement Request
Status **Incomplete**

Review and Submit

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

2 When each section has been completed, it will display green check marks. You are ready to submit as a requisition!

3 If this is a recurring purchase, you can add to your Favorites for faster checkout

Request Actions | History | ?

< Previous Add to Favorites Add and go to Cart

Supplier

You may Search for Registered Suppliers and select the Supplier you would like to purchase from. If you are unable to locate the Supplier, the Supplier is not active for CSULB business units to shop from. **See Section 14-Suppliers** for additional information regarding steps to take to add the Supplier.

Add Lines to the Shopping Cart Order a Form

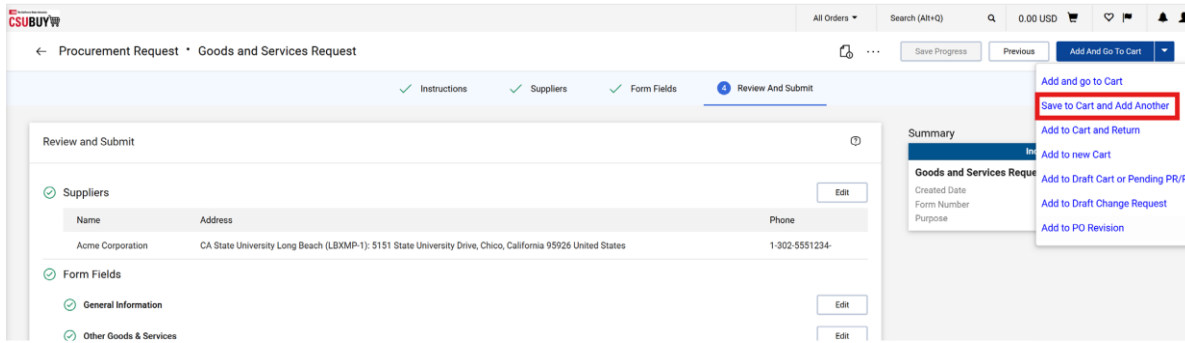
Important note: All lines must include a separate Form, but they must be the SAME Form. In other words, you cannot have a Goods and Services Form and an IT Hardware Form in the same Shopping Cart. No mixing Forms in the Shopping Cart.

There are three ways to add a line to the Shopping Cart when using Forms.

When Your First Form/Item is not yet Added to the Shopping Cart and You Want to Use the Same Filled Out Form for Another Item:

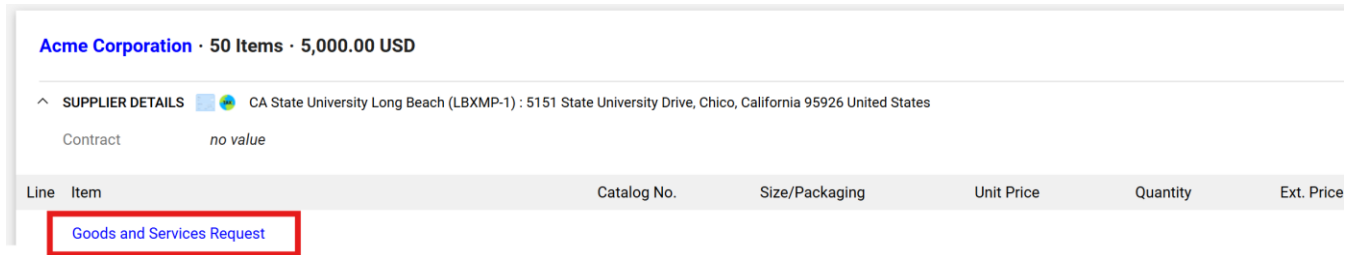
When you are still in the Form select **Save to Cart and Add Another**

This will take you through the form you are currently utilizing, allowing you to change fields such as items, price, quantity, commodity codes, etc.

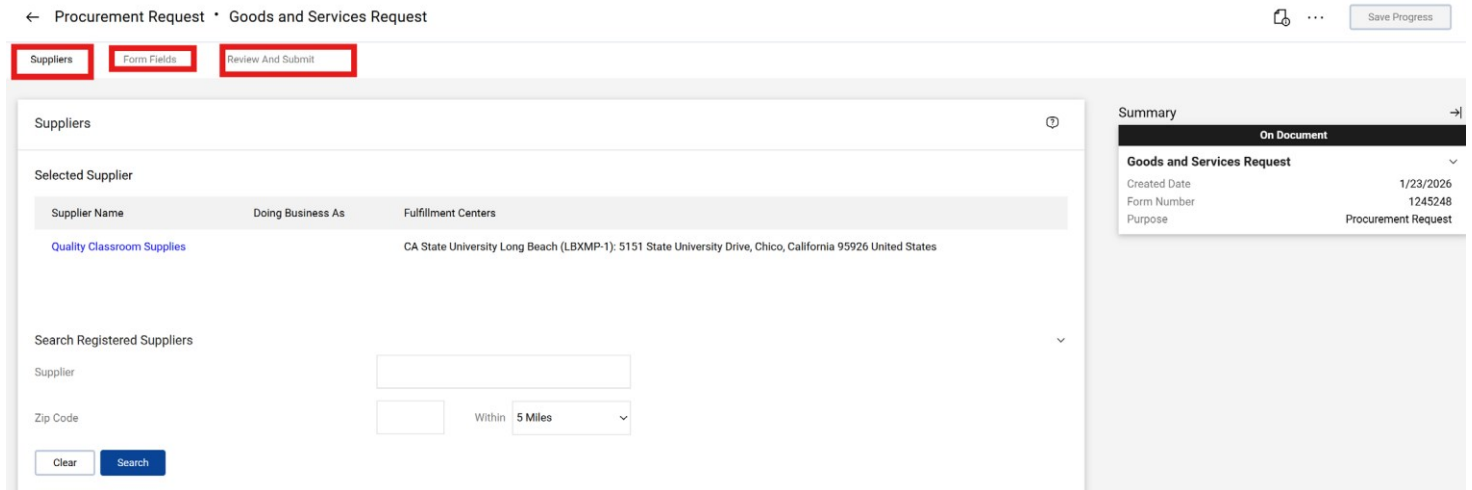


When your First Form/Item is Already in the Shopping Cart and You want to Use the Same Filled Out Form for Adding Another Item:

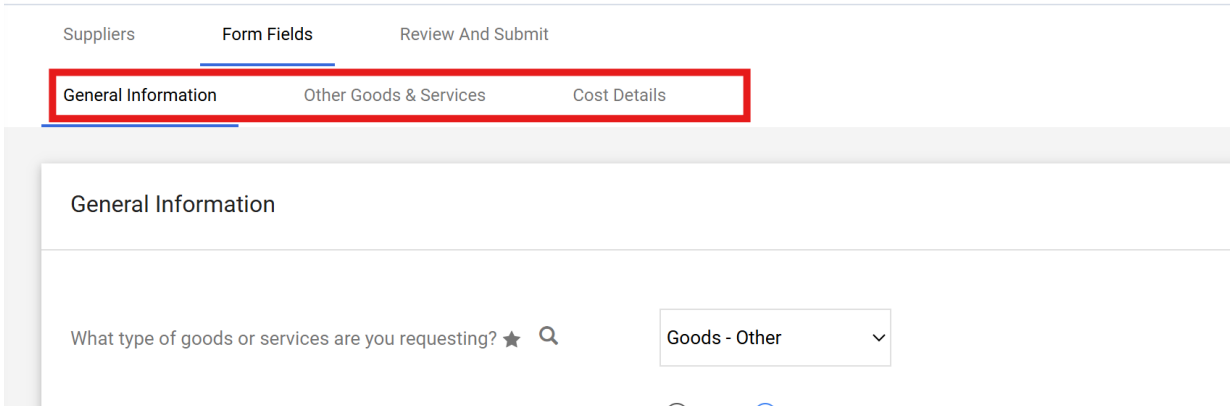
Click on the Form under Item in your Cart.



Make updates as needed by clicking on each of the tabs below.



Make sure you review each tab under Form Fields and edit it as needed:

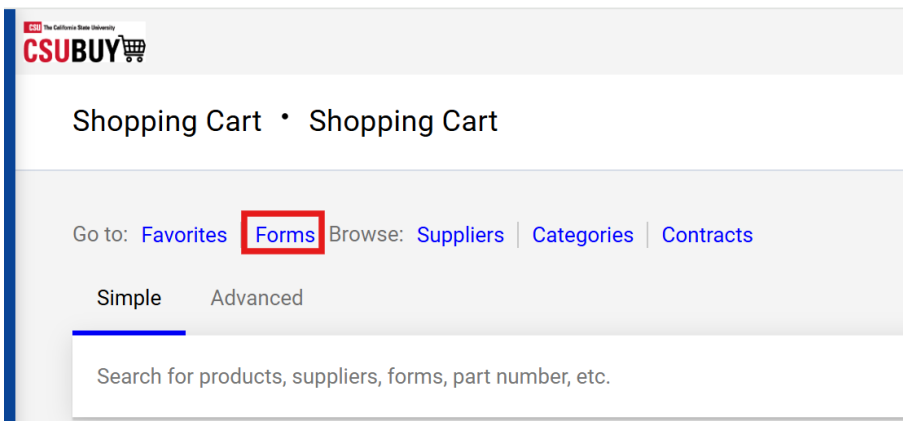


As a last step, click on **Review and Submit** and then **Add And Go to Cart**.



When your First Form/Item is Already in the Shopping Cart and You want to Start with a BLANK Form

From the Shopping Cart, select Forms and make sure you select the same exact Form as the one already in your Shopping Cart. For example, if you have an IT Hardware Form, you must select the IT Hardware Form. If you need to use a different Form, please start with a new empty Shopping Cart.




Then proceed to complete it and Add to your Cart.


Note on Blanket PO

When completing a Form in the General Information section, indicate if the purchase is related to a Blanket PO. A Blanket PO is a Purchase Order for goods or services with multiple payments not based on quantities being delivered.

- By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
- Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.

▼ General Information

What type of goods or services are you requesting? * 

Goods - Other 

Is this a Blanket Order? *

Yes No

Is the request for a renewal of a previous purchase?

Yes No

For FY 2025, if the request equals “Yes” for a renewal of a PO originally created in CFS, in the comments section of the PO, make a note of the previous PO number from CFS. For additional information regarding Blanket Pos, see **Chapter 6 – Other Topics & References – 7 – Blanket PO Guide**.

Multi-Year PO

This should never be selected for our campus.

Once the Form is complete, a line is created in the Shopping Cart with the Form. You may add additional Forms in the same Shopping Cart as long as it is the same Form. Do not mix Forms in the Shopping Cart.

6-ADDITIONAL FORMS

There are additional Forms available that are not used to purchase a product:

- Payment for Unauthorized Purchase
- Request to Close PO
- Supplier Extension or Re-Invite

Payment for Unauthorized Purchase

A purchase that does not require a PO. Examples include:

- Academic Recruitment Commission/Fee
- Attorney Fee
- Freight / Postage / Shipping
- Legal Settlement
- Local & Federal Government Payment
- Medical Service Payment
- Memberships
- Official/Referee Payment
- Permit / License (non-IT)
- Royalty Payment
- Subscription/Publication (non-IT)
- Utilities

When opening the form, follow the prompts and submit the form.

Request to Close PO

A PO may need to be manually closed if the order is complete, but the system still shows an open status due.

When opening the Form, complete the fields click Next and on the next screen click Submit.

Request to Close PO

Form Number 1233156
Purpose Generic Request
Status **Incomplete**

Instructions

Questions

Review and Submit

Discussion

Form Approvals

Questions - Request Details

Request Actions | History | ?

★ Response Is Required

Request Details

Purchase Order Number *

Supplier Name *

Justification for Request *

2000 characters remaining

Previous Save Progress Next

Supplier Extension or Re-Invite

A supplier extension or re-invitation may be necessary when a supplier needs to be added to a different business unit or when reactivating a supplier who is currently inactive in the system. Please see Section 14-Supplier for detailed information.

When opening the form, select the correct option and answer the questions on the Form. Then click **Next** and on the next screen click **Submit**.

Supplier Resend Invitation...

Form Number 1233186
Purpose Generic Request
Status **Incomplete**

Instructions

Questions

Review and Submit

Discussion

Form Approvals

Questions - General

Request Actions | History | ?

★ Response Is Required

On This Page

Request Type (1)
Resend Invitation: Supplier Information (2)

Request Type

What are you requesting? *

Resend an invitation to the same email address that was previously invited
 Extend an existing CSUBUY supplier to new campus

Resend Invitation: Supplier Information

Suppliers Legal Company Name *

CSUBUY Supplier Number

Previous Save Progress Next

7-SHOPPING CART FIELDS & SHOPPING CART MANAGEMENT

This section will provide guidance on the following:


- Description of fields in a Shopping Cart
- Creating a new Shopping Cart
- View Draft Shopping Carts
- Deleting a Shopping Cart
- Copy a Shopping Cart
- Other Actions in a Shopping Cart (including removing an item)

Shopping Cart Fields

The first section includes **Cart Name** where you may edit the Shopping Cart name.

Note: The Cart Name does not flow through to the Data Warehouse. If you rename the cart, rename the cart to something that works for your internal process. For example, if you process multiple Staples Orders for different areas, you could use some logic in the cart name – Staples - Dean’s Office.

Add the **Deliver To Location** which is the **Campus building and room number** you would like your product delivered. **DO NOT** enter **CSULB Receiving** since this is the Ship To location. You may search for available places using the magnifying glass icon.

Cart Name	<input type="text" value="2025-12-12 40000961994 01"/>
Deliver To Location	<input type="text" value="AS-112_LBCMP"/> 

The next sections provide Supplier Details and the Line Items for the Products in your Shopping Cart.

In the Shopping Cart, you may:

1. Confirm the **Commodity Code** and adjust, if needed. The Commodity Code is automatically entered based on the Supplier. The Supplier is assigned a Commodity Code. However, the Commodity Code may need to be adjusted. **THIS IS THE ONLY PLACE YOU MAY ADJUST THE COMMODITY CODE.** If a Shopper is assigning the Cart to a Requester, the Requester can return to the cart by clicking on the shopping cart and then selecting “View My Cart.” Then the Requester can update the Commodity Code. Please see **Chapter 6-Section 1 for a list of Commodity Codes and Section 12** for more information on Commodity Codes.
2. Do not adjust **Receiving Required**. This is automatically checked based on commodity code and will trigger the requirement to Create a Receipt for when you receive the product or service.
3. Indicate if the product is an **Asset** that should be capitalized (must be at least \$5,000). This will also trigger the requirement to Create a Receipt when you receive the product.

ITEM DETAILS

Performance Start Date

Performance End Date

[more info...](#)

Commodity Code 170003
General Supplies

Taxable

Receiving Required

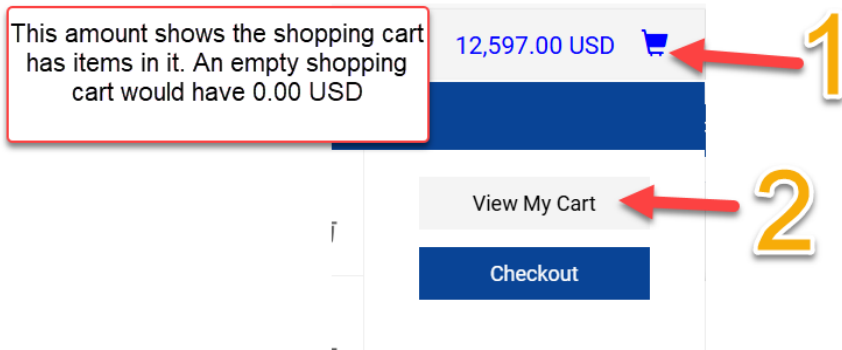
Asset

Creating a New Shopping Cart

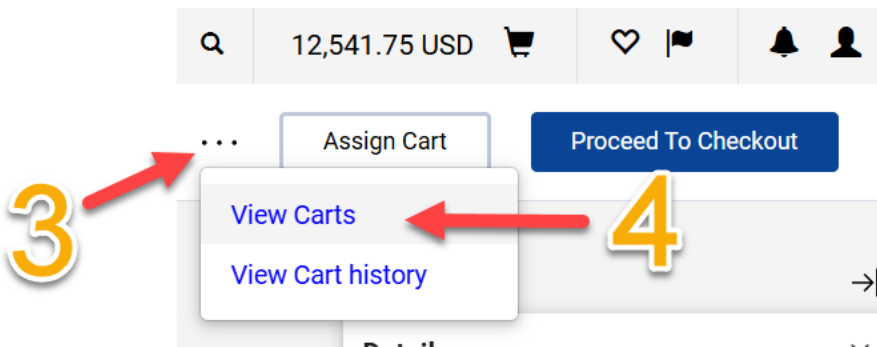
You may save your current Shopping Cart with items in it as a draft and create a new Shopping Cart by following these instructions:

Click on the shopping cart icon in the top right corner and select **View My Cart**.

This takes you inside your shopping cart.



Click the 3 dots in the upper right corner and select **View Carts**



This takes you to the Cart Management screen with all the Draft Carts. The Cart Number is your DRAFT Requisition number.

Click on **Create Cart**

CSUBUY

Shop > My Carts and Orders > View Carts > Draft Carts

Cart Management

Draft Carts **Assigned Carts**

> Filter Draft Carts

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	4366822	2025-09-25 40000300731 02		9/25/2025	48,262.50 USD	View
Normal	4370131	2025-10-01 40000300731 01		10/1/2025	72,000.00 USD	View
Normal	4386889 Active	2025-10-24 40000300731 01		10/24/2025	0.00 USD	View

Viewing Draft Carts

To see your draft carts, go to Shop > My Carts and Orders > View Carts > Draft Carts.

CSUBUY

Shop (Alt+P)

- Shop
- Shopping
- My Carts and Orders
- Admin

Open My Active Shopping Cart

- View Carts
- View My Orders (Last 90 Days)

Cart Management

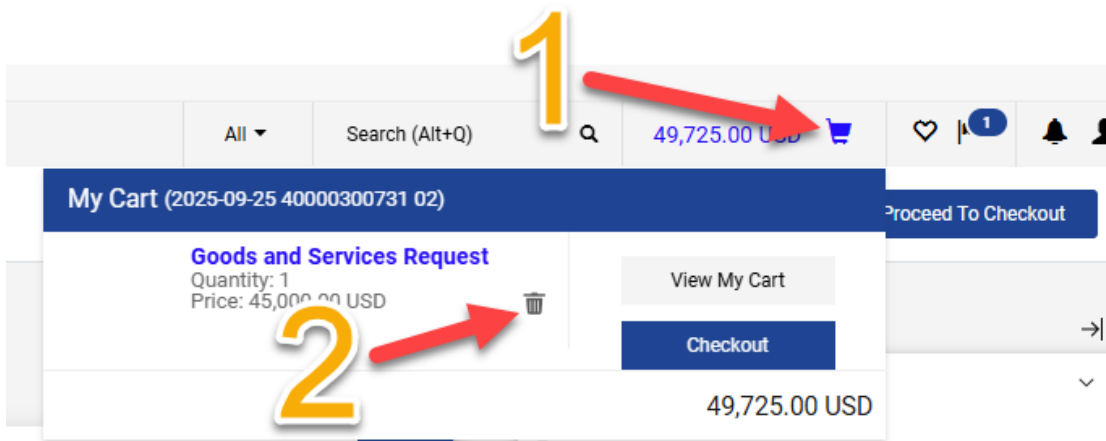
Draft Carts Assigned Carts

> Filter Draft Carts

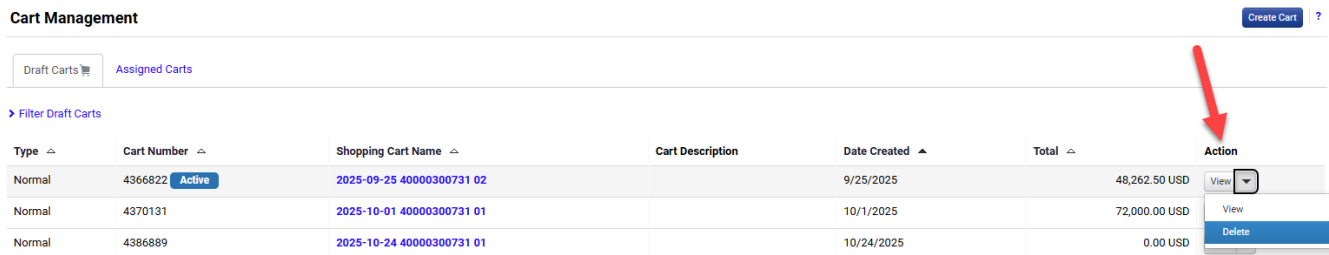
Type	Cart Number	Shopping Cart Name
Normal	4366822	2025-09-25 40000300731 02
Normal	4370131	2025-10-01 40000300731 01
Normal	4386889 Active	2025-10-24 40000300731 01

Delete a Shopping Cart

The Active Cart Number indicates the Shopping Cart you are currently in. To delete a Shopping cart you are currently in, select the cart icon, then the trash icon to delete. Note, this action deletes the item; therefore, if you have more than one item, you must delete them all.



Alternatively, from your Cart Management page, in the Draft Carts tab, select the dropdown from the Action column and select **Delete**.



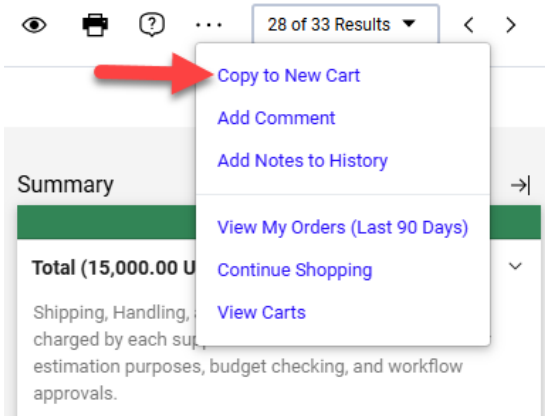
Copy to a Shopping Cart (For Forms ONLY; not for PunchOut Orders)

You may copy a previous order to a new Shopping Cart. This is helpful if you have items that you purchase frequently. You are able to save a draft of the Shopping Cart for future purchases and/or repurchase the previous order. Go to **My Requisitions** as shown below.



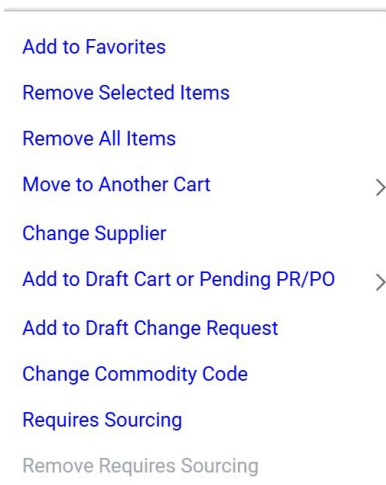
Select the requisition number with the items you would like to repurchase.

In the upper right corner of the requisition, select **Copy to New Cart**. This will create a new cart with the same items you have previously purchased.



Actions in a Shopping Cart

You can perform the following actions in the Shopping Cart.



By clicking on the arrow, the actions become available. You may select one, more than one or all items in the Shopping Cart in which the action will apply. The selected items are indicated by the green check mark. In this example only one item in the Shopping Cart was selected.

Shopping Cart • Shopping Cart

Search for products, suppliers, forms, part number, etc.

Cart Name: 2025-12-12 40000961994 01

Deliver To Location: AS-112_LBCMP

Summary

Details

For: Minna Chang

Total (3,315.00 USD)

Shipping, Handling, and Tax charges by each supplier. The values are for estimation purposes, budget checking, and workflow approvals.

6 Items

Acme Corporation • 6 Items • 3,000.00 USD

SUPPLIER DETAILS: CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States

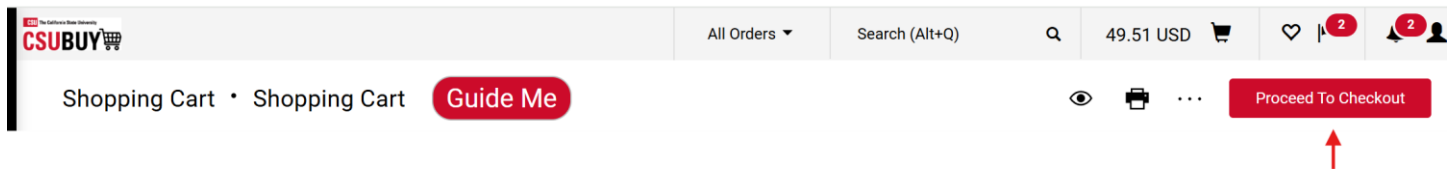
Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Test Procurement Request: Goods and Services Request		EA	500.00	Qty: 3 EA	1,500.00

Actions for 1 selected item:

- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Change Supplier
- Add to Draft Cart or Pending PR/PO
- Add to Draft Change Request
- Change Commodity Code
- Requires Sourcing
- Remove Requires Sourcing

8-PROCEED TO CHECKOUT & DRAFT REQUISITION OVERVIEW

Once your Shopping Cart is complete, you will click on **Proceed to Checkout**.



This action will create a DRAFT Requisition with a number. Please keep in mind, at this stage this is a DRAFT Requisition. It is not considered a Requisition until it is submitted to workflow by the Requester.

You may also click on the cart icon and go back to the Shopping Cart stage. The following is the Summary tab.

Reviewing the Summary of the DRAFT Requisition

There are essential elements in the Summary of the DRAFT Requisition to be reviewed. Updates may be made by clicking on the pencil icon, which indicates a field that can be edited.

The screenshot shows a summary form for a DRAFT Requisition. The form is divided into several sections, each with a numbered callout:

- 1** General Information: Transaction Details. Cart Name: Demo Order. Business Unit: Cal State Univ, Chico P2P (CHXC0).
- 2** Address Information: Ship To. Attn: Rocky Requester, c/o Receiving, 940 West 1st Street, Chico, CA 95929, United States. Deliver To: 100A_CHICO, Arts and Humanities 100A. Ship Via: Best Carrier-Best Way. Due Date: no value. Bill To: Accounts Payable, Chico, California State University, Chico, 400 West 1st Street, Chico, CA 95929, United States.
- 3** PO Information: Accounting Date: no value. PO Type: no value. Amount-Only / Blanket PO: X. Multi-Year PO: X. Reference ID: no value.
- 4** Other Participant Information: Prepared by: Rocky Requester. Prepared for: Rocky Requester. Buyer: no value. Ad-Hoc Approver: Select.
- 5** External Notes and Attachments: Note to all Suppliers: no value. Attachments for all suppliers: Add.

1. Cart Name / Business Unit
2. Ship To / Deliver To / Bill To

3. PO Information

Amount-Only/Blanket PO

- Purchase Order for goods or services with multiple payments not based on quantities being delivered. By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
- Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.

4. Multi-Year PO

This should never be selected for our campus.

5. Other Participant Information

Prepare By: The user that submitted the cart into workflow which is the Requester.

Prepare For: The user that created the cart, which is either the Shopper or Requester. They are also the PO Owner, Voucher Owner, and the user responsible for Verify Receipt or Create a Receipt when the product or service is received.

6. Notes and Attachments

You may add a note to the Draft Requisition as well as attach a file or link. Notes and Attachments are useful to let others know additional information regarding the order.

Internal: These are only visible to all users that are internal, within the CSU

External: These are visible to both external and internal users. External users would be suppliers.

Supplier Details and Item Details

The next section includes information on the Supplier and the Item purchased.

Amazon.com · 1 Item · 8.89 USD

SUPPLIER DETAILS CA State University Long Beach (LBXMP-4) : 6400 Valley View Street, Buena Park, California 90620 United States

Contract *no value* Supplier Account No. *no value*

Quote number *no value* PO Clauses *no clause*

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Avery Hi-Liter Desk-Style Highlighters, Smear Safe Ink, Chisel Tip, 12 Fluorescent Yellow Highlighters (24000)	B0013L7ECW	EA	8.89	Qty: 1 EA	8.89

ITEM DETAILS

Manufacturer Name: Avery Contract: *no value* Tax Code: LBC Long Beach Sales Tax

Manufacturer Part Number: 24000 Commodity Code: 170003 / General Supplies Taxable: ✓

Supplier Part Auxiliary ID: asid-cdJHWi4ddv06YUf Receiving Required: *no value* Asset: ✗

Contains Discount: ✗ Asset Profile ID: *no value*

Prepayment: *no value* Work Order: *no value*

PO Clauses: *no clause*

CHARTFIELD Values have been overridden for this line

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
LBCMP	<i>no value</i>	<i>no value</i>	660003_LBCMP	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>

1. Supplier Detail

2. Item Detail

Performance Start/End Date (if available): Please include these dates if you are receiving a service

Commodity Code: Ensure the correct commodity code is entered. The commodity code will then create a default account entry. See Section 12 regarding Commodity Codes and Chapter 6, Section 1-List of Commodity Codes to Account Codes

Receiving Required: Leave this as blank. Receiving Required will be triggered based on the Commodity Code for the item being purchased.

Asset: Please mark YES if you know the item is an asset that will be capitalized, typically assets over \$5,000.

3. **Chartfield**

Shoppers may complete the Chartfields but are not required. They may assign the cart to the Requester to complete the Chartfields.

Requesters are required to complete the Chartfields before submitting the Requisition to workflow.

See Section 9-Draft Requisition: Chartfields

Comment, Attachments, and History

CSUBUY

Requisition • 211592313 [Guide Me](#)

Summary Taxes/S&H PO Preview **Comments** Attachments History

General Information		Address Information		PO Information	
Transaction Details		Ship To		Accounting Date	no value
Cart Name	2026-01-28 40000961994 01	Attn: Minna Chang CSU Long Beach - Receiving 1331 Palo Verde Ave Long Beach, CA 90840-0005 United States		PO Type	no value
Business Unit	LB - CA State University Long Beach P2P (LBXMP)	Deliver To		Amount-Only / Blanket PO	✗
		Deliver To Location	AS-112_LBCMP Academic Services	Multi-Year PO	✗
		Ship Via	Best Carrier-Best Way	Reference ID	no value
				Do Not Distribute	✗

Comment Tab



Allows you to enter Comments as well as Attachments that may be helpful to the Reviewer or Approver. You may select from the drop-down menu if you would like your comment and attachment to appear on the Requisition, Purchase Order, Voucher, Receipt or ALL of these documents for this order.



When the box below appears, type your comment. **Once you click on the check mark, you cannot edit or delete it.** Click the **X** if you decide you do not want to add a comment. You may also add an attachment or link.

Requisition • 4433102

Summary Taxes/S&H PO Preview **Comments** Attachments History

Records found: 0

Show comments for Requisition  

ADD COMMENT  

This will add a comment to the document.

Attach file (optional)

Attachment Type File Link/URL

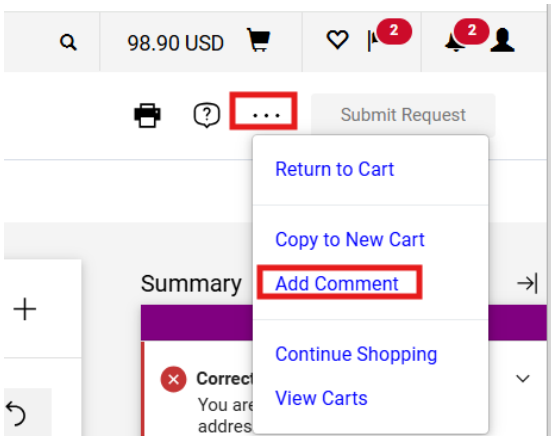
File Name

File

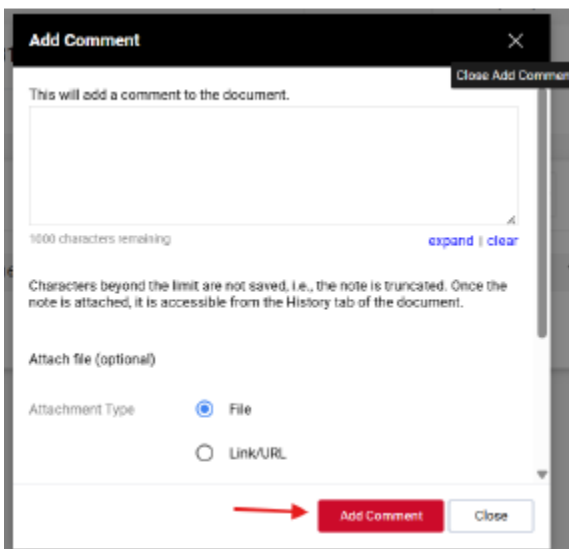
1000 characters remaining [expand](#) [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

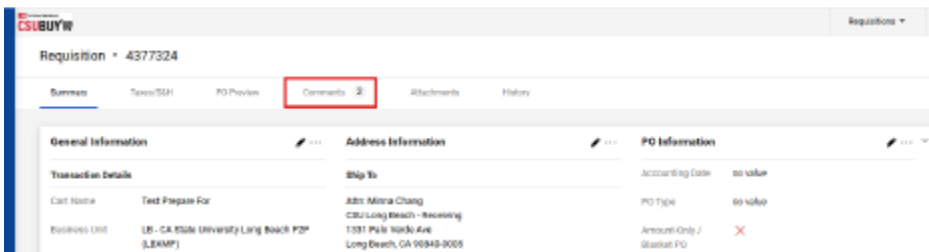
You may also add a comment by clicking on the three dots and selecting Add Comment



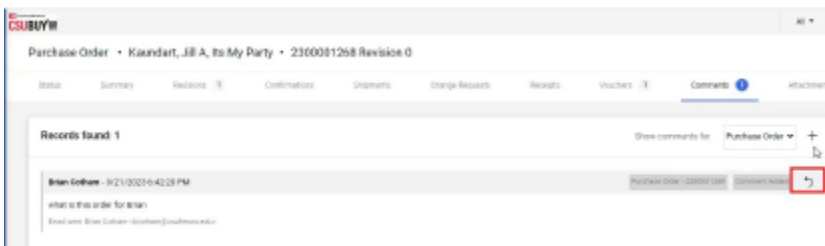
The pop-up will appear where you may type your comment. You also have the option to add an attachment.



When a comment is added, it is indicated as shown below:



A user can reply to a comment by clicking on the arrow as shown below:



Attachments Tab

You may add an internal or external attachment here. Internal attachments are only viewed by CSU users and external attachments can be viewed by those outside the CSU such as Suppliers.

History Tab

This allows you to see all the changes made to the document, who made the change and the day/time of the change. This is extremely helpful for troubleshooting any issues.

The screenshot shows the History Tab interface. At the top, there are search filters for Start date, End date, and User. Below the filters are buttons for Filter and Clear All Filters, and an Export CSV button. The main area displays a table of changes with columns: Line No, Date/Time, User, Step(s), Action, Field Name, From, To, and Note. The table contains four rows of data.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/22/2025 10:58:18 AM	Minna Chang		Comment Added				Test
Line 1	12/22/2025 10:34:09 AM	Minna Chang		Requisition modified	Commodity CF	115001	157002	The Custom Field Value is changed/populated based on the commodity code: 157002
Line 1	12/22/2025 10:34:09 AM	Minna Chang		Requisition modified	Account	660940_LBCMP	605002_LBCMP	The Custom Field Value is changed/populated based on the commodity code: 157002
Line 1	12/22/2025 10:34:09 AM	Minna Chang		Requisition modified	Commodity Code	115001	157002	

9-DRAFT REQUISITION: CHARTFIELDS

Chartfields for each item must be entered before the Requester submits the Requisition to workflow.

Shoppers may complete the Chartfields but are not required. They may assign the cart to the Requester to complete the Chartfields.

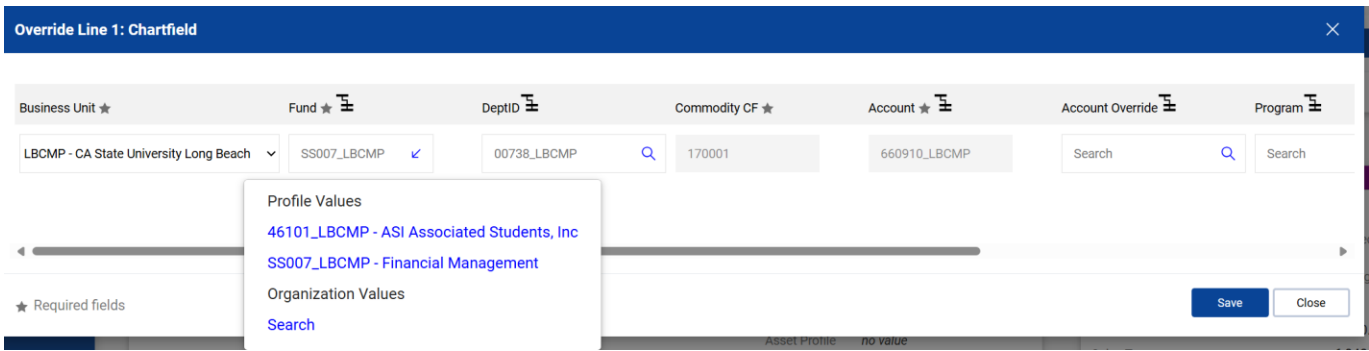
Requesters are required to complete the Chartfields before submitting the Requisition to workflow.

The chartfields can also be edited by clicking on the pencil icon.

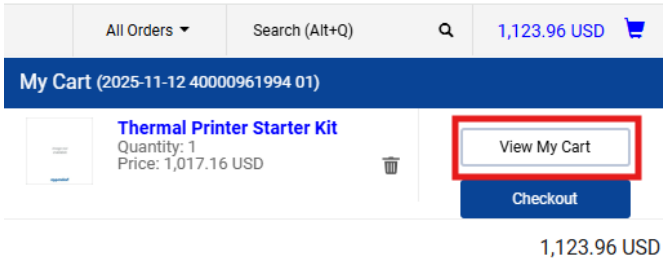
The screenshot shows a table with the following columns: Business Unit, Fund, DeptID, Commodity CF, Account, Account Override, Program, Class, and Project. The table contains one row of data. Above the table, there is a note: "Values have been overridden for this line" and a pencil icon.

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State	GF001_LBCMP CSU Operating	00732_LBCMP CMS Financial	170003 General	660003_LBCMP Supplies and	no value	no value	no value	no value

You may edit the Business Unit, Fund, and Department ID. The Commodity Code and Account is automatically populated. **If the auto populated Account is not correct, you may override the Account by entering the updated Account in the Account Override field.** (Please note, an Account Override entry will trigger an Accounting Review to be added to the workflow.) You may also add a Program, Class, and Project ID in the fields.

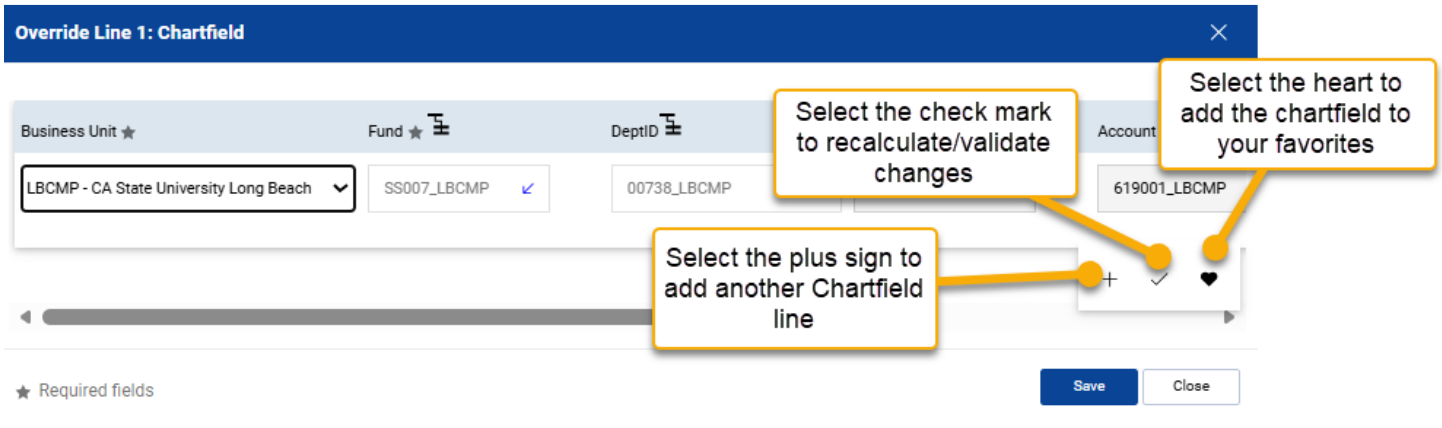


Commodity Code could only be edited in the Shopping Cart by View My Cart. Edit and then Proceed to Check Out again.

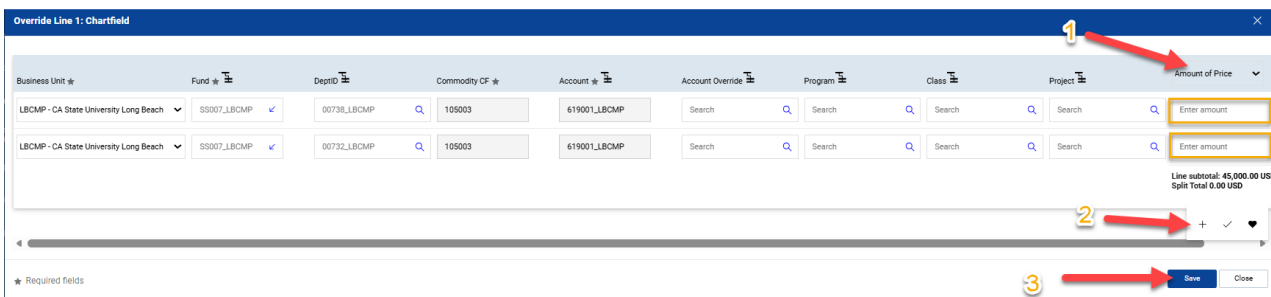


Split Chartfields

If the item should be charged to separate funds or departments, select the plus sign in the bottom right corner of the Chartfield Override line and insert the information.



After adding a new line, enter the chartfields in the field. Scroll to the last column and select the dropdown and select how the split should be made. Confirm the split amounts for payment and **Save**.



Copying Chartfields to Lines

Chartfields can be copied from the header to individual lines.

Values have been overridden for this line

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
SLCMP Cal Poly, San Luis Obispo	60022_SLCMP M E Project Based Learning Lab	100300_SLCMP CAFES-Agribusiness	660003_SLCMP Supplies and Services	no value	no value	no value	no value

Copy To Other Lines: Chartfield

Select code values to be copied and the line(s) they will be copied to.

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
SLCMP Cal Poly, San Luis Obispo	60022_SLCMP M E Project Based Learning Lab	100300_SLCMP CAFES-Agribusiness	660003_SLCMP Supplies and Services	no value	no value	no value	no value

Amazon.com

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
2 Pilot G2 Retractable Gel Pens, Fine Point, 0.7 mm, Black Barrel, Black Ink, Pack Of 36 Pens	B000CPFK4	EA	39.47	1 EA	39.47

Copy Close

ChartField Combination Edit Errors

Just as in CFS, if the wrong set of chartfields are used or a Chartfield String is incorrect, the user will receive a combination edit error and the requisition will be stopped from further processing until the error is corrected. This validation occurs when the "Submit Requisition" is selected.

Shopping as: LBXMP - CA State University Long Beach, Business Unit: LB - CA State University Long Beach P2P

Requisition: 213094809

Submit Request

General Information	Address Information	PO Information
Transaction Details Cart Name: XMP TEST COMBO EDIT Business Unit: LB - CA State University Long Beach P2P (LBXMP)	Ship To Attn: Mei(MaryEllen) Castillo CSU Long Beach - Receiving 1331 Palo Verde Ave Long Beach, CA 90840-0005 United States Deliver To Deliver To Location: BH-300_LBCMP Brozman Hall Ship Via: Best Carrier Best Way Due Date: no value Bill To Accounts Payable, CSULB ap@csulb.edu 6300 E. State University Dr., Ste 332 Long Beach, CA 90815-4670 United States	Accounting Date: no value PO Type: no value Amount-Only / Blanket PO: X Multi-Year PO: X Reference ID: no value Do Not Distribute: X

Chartfield

Values vary by line.

Other Participant Information	Internal Notes and Attachments	External Notes and Attachments
Prepared by: Mei(MaryEllen) Castillo Prepared for: Mei(MaryEllen) Castillo Buyer: no value	Internal Note: no value Internal Attachments: Add	Note to all Suppliers: no value Attachments for all suppliers: Add

Summary

Total (500.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	500.00
Sales Tax	0.00
Use Tax	0.00
Shipping	0.00
Handling	0.00
Total	500.00

What's next for my order?

Next Step: Wait for Validation 1

Approver: Approver (DO NOT DELETE), Workflow

Workflow:

- Draft (Active) - Mei(MaryEllen) Castillo
- Start - Parallel Steps
- Requisition Validation 1 (Future)
- Wait for Validation 1 (Future)
- End - Parallel Steps

Some examples of combination edit errors are as follows:

Using a Research Foundation “G” Fund without including a project number or using Lottery funds for construction. Neither of these combinations are allowable.

Combination edits help ensure that the expenditure is an allowable expense against the funds being used and/or ensure that the data flows properly from CSUBUY into the general ledger.

Example of “combo edit” errors for Business Unit LBXDN and LBCMMP are shown below:

LBXDN – Research Foundation – showing attempt of using a “G” Fund without a project number.

Shopping as: LBCMMP - CA State University Long Beach, Business Unit: LB - CA State University Long Beach P2P

Requisition 211833175 [Guide Me](#)

Summary Taxes/SSH PO Preview Comments Attachments History

General Information Address Information PO Information

Chartfield

Other Participant Information Internal Notes and Attachments External Notes and Attachments

1 Item

*Supplier Not Known · 1 Item · 500.00 USD

SUPPLIER DETAILS CSULB Research Foundation (LBXDN-1) · 401 Golden Shore, Long Beach, California 90802 United States

Contract no value Supplier Account No. no value

Quote number no value PO Clauses no clause

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	TEST COMBO EDIT		EA	500.00	1 EA	500.00

ITEM DETAILS

Performance Start Date Commodity Code 170003 / General Supplies Tax Code LBC Long Beach Sales Tax

Performance End Date Receiving Required no value Taxable ✓

more info... Contains Discount ✗ Asset ✗

Prepayment no value Asset Profile ID no value



PO Clauses no clause Work Order no value

CHARTFIELD Values have been overridden for this line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBFON CSULB Research Foundation	G3019_LBFDN Affirm+Equine+EthnicStudies	00738_LBCLMP Financial Management	170003 General Supplies	660003_LBCLMP Supplies and Services	no value	no value	no value	no value

Email received to confirm that requisition has been submitted.

Your Requisition has Been Submitted for Approval-Requisition#: 211833175

 noreply@jaggaer.com
To:  Mary Ellen Castillo

 This sender noreply@jaggaer.com is from outside your organization.

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.



Re: REQUISITION SUBMITTED FOR APPROVAL #: 211833175
Cart Name: TEST COMBO EDIT
Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

[View Requisition](#)



If you have any questions with regard to your requisition, please contact your Support Team.

Support Team Contact Information:
csubuy@calstate.edu


Thank you,
The California State University (CSU)

Email for returned Requisition:

Your requisition has been returned. Requisition#: 211833175

 CSUBUY <noreply@jaggaer.com>
To:  Mary Ellen Castillo

 This sender noreply@jaggaer.com is from outside your organization.

 If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.



Re: Requisition Returned For Requisition #: 211833175

Cart Name: TEST COMBO EDIT

Prepared for: Mel(MaryEllen) Castillo

Prepared by: Mel(MaryEllen) Castillo

Returned by:

Dear Mel(MaryEllen) Castillo,

The requisition listed above has been returned by an approver. You can review a read only version of this requisition by selecting the URL below.

[View Requisition](#)

Workflow Validation step 1 (Chartfield combo and validation):

Draft (returned)

Total (552.50 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	500.00
Sales Tax	52.50
Use Tax	0.00
Shipping	0.00
Handling	0.00
Total	552.50

What's next for my order?

Next Step: **Wait for Validation 1**

Approver: [Approver \(DO NOT DELETE\), Workflow](#)

Workflow

```

graph TD
    Draft((Draft)) --> Start[Start - Parallel Steps]
    Start --> RV1((Requisition Validation 1))
    Start --> W1((Wait for Validation 1))
    RV1 --> End[End - Parallel Steps]
    W1 --> End
    End --> DOA((DOA Approval - Fund))
    DOA --> PR((Procurement Review))
    PR --> SNK((Supplier Not Known))
  
```

Cart Management

[Draft Carts](#) [Assigned Carts](#)

[Filter Draft Carts](#)

Type	Cart Number	Shopping Cart Name
Normal - Returned	211833175	TEST COMBO EDIT

Requisition History

Requisition • 211833175

Summary Taxes/S&H PO Preview Comments Attachments **History**

⚠ This is not your active cart.

Start date: mm/dd/yyyy End date: mm/dd/yyyy User: [Search] Filter Clear All Filters Export CSV

Page 1 of 2 1-20 of 25 Results 20 Per Page

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	3/4/2026 9:43:27 AM	System		Requisition returned		System	Mel(MaryEllen) Castillo	Line: 1, Split: 1 - Invalid ChartField combination FUND_CODE/ACCOUNT/ PROJECT_ID in combo group FUND_PRJ Show less
	3/4/2026 9:43:18 AM	System	Requisition Validation 1	Message transmission to external system was successful.				
	3/4/2026 9:43:08 AM	System		Successful use tax callout to tax engine.	Sales Tax			
	3/4/2026 9:43:08 AM	Mel(MaryEllen) Castillo		Requisition submitted				Submitted using the persona for Mel(MaryEllen) Castillo, LBXDN - CSULB Research Foundation (LBXDN)
Line 1	3/4/2026 9:40:58 AM	Mel(MaryEllen) Castillo		Requisition modified	Fund	GF100_LBFDN	G3019_LBFDN	
Line 1	3/4/2026 9:37:13 AM	Mel(MaryEllen) Castillo		Requisition modified	DeptID	empty	00738_LBCMP	
Line 1	3/4/2026 9:37:13 AM	Mel(MaryEllen) Castillo		Requisition modified	Fund	empty	GF100_LBFDN	
Line 1	3/4/2026 9:37:13 AM	Mel(MaryEllen) Castillo		Requisition modified	Business Unit	LBCMP	LBFND	

XMP Chartfield example showing the attempted use of Lottery Funds (48101) for construction:

Shopping as: LBXMP - CA State University Long Beach, Business Unit: LB - CA State University Long Beach P2P

Requisition • 213094809 **Guide Me**

Summary Taxes/S&H PO Preview Comments Attachments History

Values may vary:

Other Participant Information	Internal Notes and Attachments	External Notes and Attachments
Prepared by: Mel(MaryEllen) Castillo	Internal Note: no value	Note to all Suppliers: no value
Prepared for: Mel(MaryEllen) Castillo	Internal Attachments: Add	Attachments for all suppliers: Add
Buyer: no value		
Ad-Hoc Approver: Add		

1 Item

*Supplier Not Known - 1 Item - 500.00 USD

Supplier Details: CA State University Long Beach (LBXMP-1) : 401 Golden Shore, Long Beach, California 90802 United States

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	XMP COMBO EDIT TEST		EA	500.00	1 EA	500.00

Item Details:



Performance Start Date	Commodity Code	100007 / Capital-State Agency Costs	Tax Code	no value
Performance End Date	Receiving Required	no value	Taxable	×
more info...	Contains Discount	×	Asset	×
	Prepayment	no value	Asset Profile ID	no value
	PO Clauses	no clause	Work Order	no value

Chartfield: Values have been overridden for this line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State University Long Beach	48101_LBCMP Lottery Discretionary	00715_LBCMP BBS Mgmt	100007 Capital State Agency Costs	607032_LBCMP Construction Management	no value	no value	no value	no value

Once the submit Request is selected, email is sent to requester to confirm that REQ has been submitted.

Your Requisition has Been Submitted for Approval-Requsition#: 213094809

 noreply@jaggaer.com
To  Mary Ellen Castillo

 This sender noreply@jaggaer.com is from outside your organization.

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.



Re: REQUISITION SUBMITTED FOR APPROVAL #: 213094809
Cart Name: XMP TEST COMBO EDIT
Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

[View Requisition](#)

If you have any questions with regard to your requisition, please contact your Support Team.

Support Team Contact Information:

csubuy@calstate.edu

Thank you,
The California State University (CSU)

“Submit Request” automatically initiates the combo validation workflow. If it fails, it returns the requisition to the requisitioner within CSUBUY and also sends an email notification to the requestor.

Your requisition has been returned. Requisition#: 213094809

 CSUBUY <noreply@jaggaer.com>
To  Mary Ellen Castillo

 This sender noreply@jaggaer.com is from outside your organization.

 If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.



Re: Requisition Returned For Requisition #: 213094809

Cart Name: XMP TEST COMBO EDIT

Prepared for: Mel(MaryEllen) Castillo

Prepared by: Mel(MaryEllen) Castillo

Returned by:

Dear Mel(MaryEllen) Castillo,

The requisition listed above has been returned by an approver. You can review a read only version of this requisition by selecting the URL below.

[View Requisition](#)

If you have any questions with regard to this requisition, please contact the assignee who returned the requisition or your SelectSite Support Team.

Support Team Contact Information:

csubuy@calstate.edu

Thank You,

The California State University (CSU)

The following note was attached to this requisition during the return:

3/4/2026 9:58 AM - System
Line: 1, Split: 1 - Invalid ChartField combination FUND_CODE/ACCOUNT in combo group CSU_LGLEDT

Requisition • 213094809

Summary Taxes/S&H PO Preview Comments Attachments History

⚠ This is not your active cart.

Start date End date Action User Filter Clear All Filters Export CSV

1-15 of 15 Results 20 Per Page

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	3/4/2026 9:58:59 AM	System		Requisition returned		System	MeI(MaryEllen) Castillo	Line: 1, Split: 1 - Invalid ChartField combination FUND_CODE/ ACCOUNT in combo group CSU_LGLEDT
	3/4/2026 9:58:49 AM	System	Requisition Validation 1	Message transmission to external system was successful.				
	3/4/2026 9:58:47 AM	System		Successful use tax callout to tax engine.	Sales Tax			
	3/4/2026 9:58:47 AM	MeI(MaryEllen) Castillo		Requisition submitted				Submitted using the persona for MeI(MaryEllen) Castillo, LBXMP - CA State University Long Beach (... Show more
Line 1	3/4/2026 9:57:32 AM	MeI(MaryEllen) Castillo		Requisition modified	DeptID	empty	00715_LBCMP	
Line 1	3/4/2026 9:57:32 AM	MeI(MaryEllen) Castillo		Requisition modified	Fund	empty	48101_LBCMP	
	3/4/2026 9:56:36 AM	MeI(MaryEllen) Castillo		Requisition modified	Cart Name	2026-03-04 40000326311 01	XMP TEST COMBO EDIT	
	3/4/2026 9:56:36 AM	MeI(MaryEllen) Castillo		Requisition modified	Cart Name	2026-03-04 40000326311 01	XMP TEST COMBO EDIT	

When reviewing your draft carts, the cart will be noted as “returned.” This means something needs to be fixed within the REQ.

Shop ▶ My Carts and Orders ▶ View Carts ▶ Draft Carts

Shopping As: LBXMP - CA State University Long Beach Business Unit: LB - CA State University Long Beach P2P

Cart Management

Draft Carts Assigned Carts

Filter Draft Carts

Type	Cart Number	Shopping Cart Name
Normal - Returned	211833175 Active	TEST COMBO EDIT
Normal	212025291	PROD TEST - MULTI FORMS
Normal	212337341	GST MULT LINES IT HARDWARE REQ - TEST
Normal	213036307	TEST: GST -- MAYRA LOPEZ
Normal - Returned	213094809	XMP TEST COMBO EDIT

To correct the error, the Shopper or requisitioner will have to go back into the cart/requisition and update the chartfields to a valid combination.

If you need assistance with this type of error, please contact the fishhelpdesk@csulb.edu.

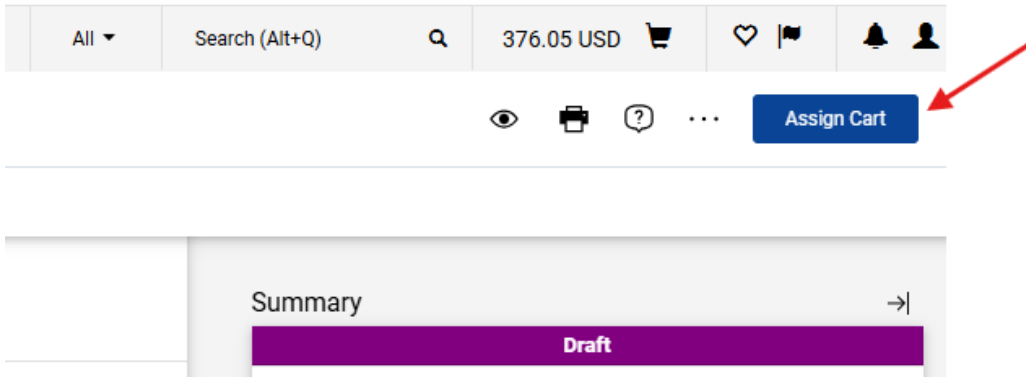
10-ASSIGN CART & SUBMIT REQUEST

Once the DRAFT Requisition has been completed, the next step:

- For a **Shopper**, **Assign Cart** to the Requester, who would then review and **Submit Request**
- For a **Requester**, **Submit Request**

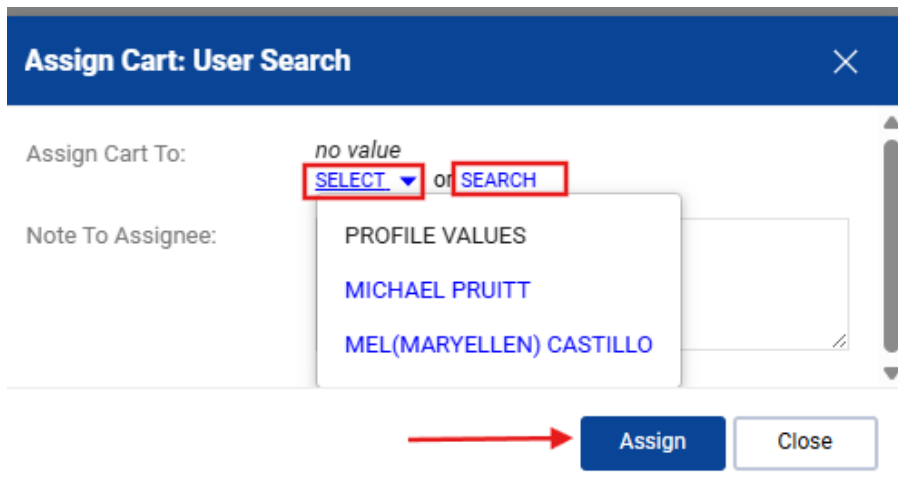
Submit Request kicks off the Requisition (no longer a draft) to workflow with the Requisition going to the DOA Approver for review and approval.

Assign Cart if you are a Shopper.



You will then be able to select a Requester. If you set up a list of Requesters in your default setting, the individual will appear when clicking on **SELECT**. Or you could click on **SEARCH** to find a Requester. You may also write a **Note To Assignee** in the field if there is any information you would like to communicate to the Requester.

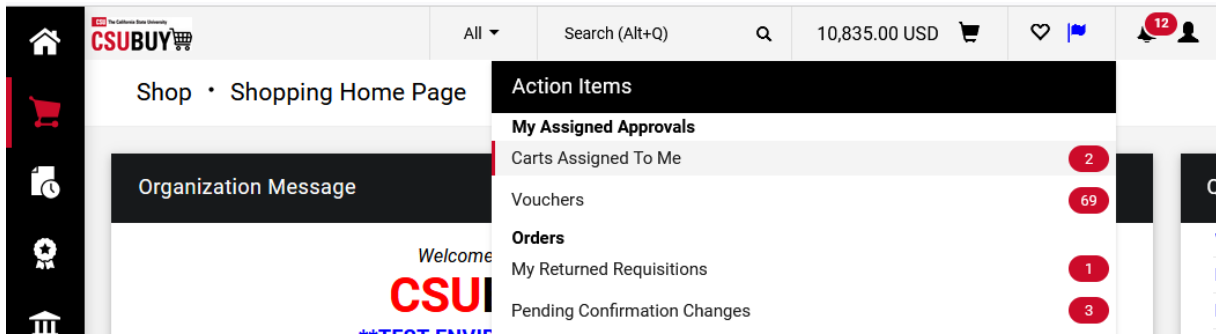
Then click on **Assign**.



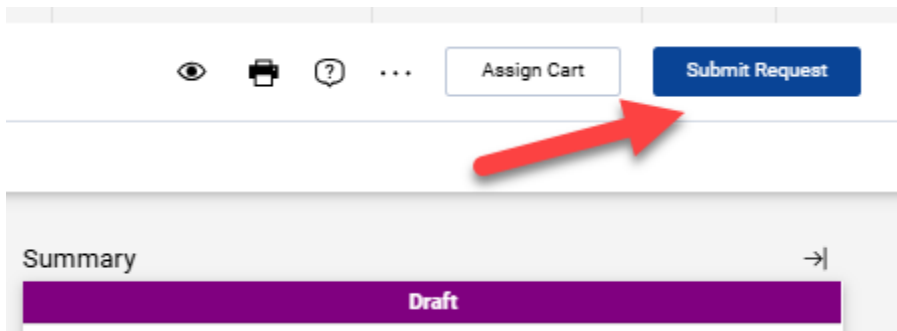
Receiving Cart from a Shopper & Submit Request

The Requester would receive a notification by email or within CSUBUY notification bell icon indicating there is a DRAFT Requisition to review.

In CSUBUY, the Requester can go to the flag icon and click on **Cart Assigned to Me**



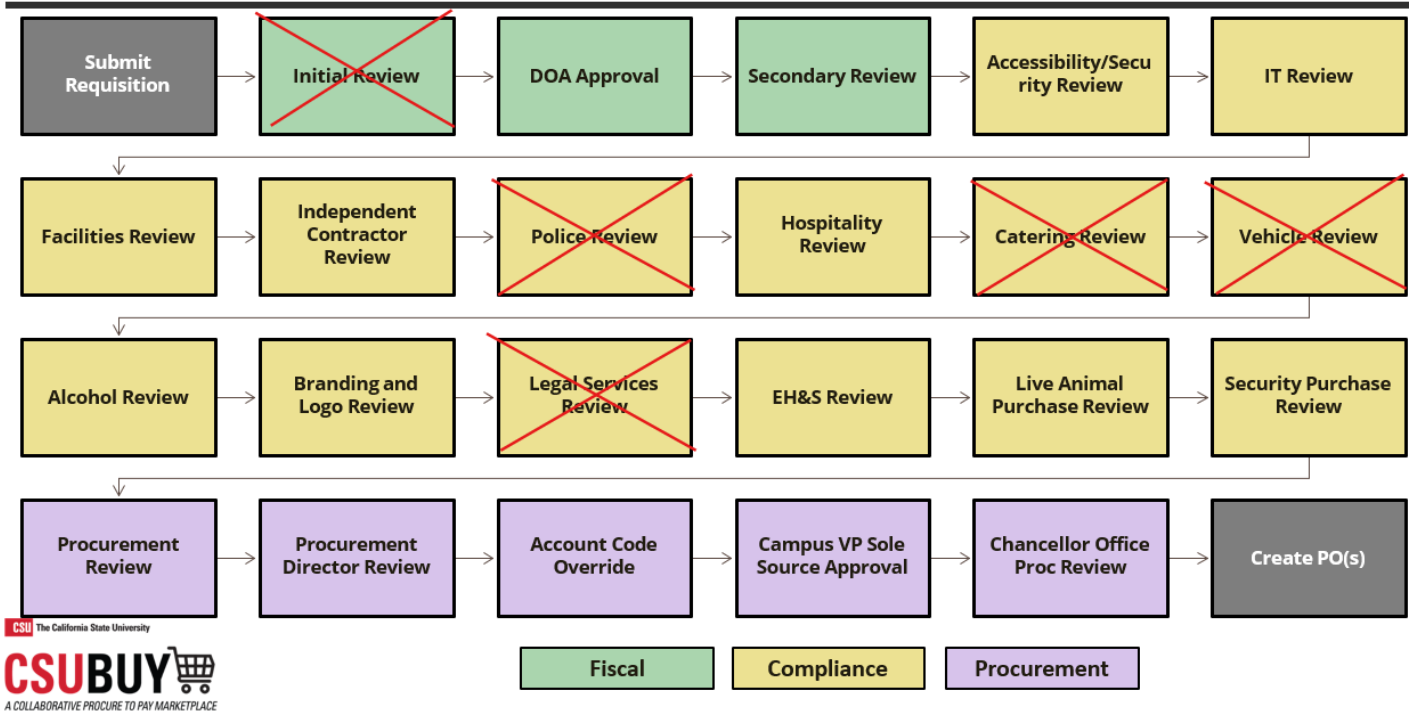
The Requester would then review the DRAFT Requisition. The Requester can edit any field with the pencil icon. The Requester may adjust the commodity code only by selecting "View My Cart." Once making the correction, the Requester could Proceed to Checkout. The Requester would then **Submit Request**.



11-REQUISITION WORKFLOW

This is an overview of all the possible reviews available in CSUBUY once the Requisition is in Workflow. Not all purchases will require each review. It depends on the product purchased. Note: CSULB does not have all Review.

CSUBUY P2P: Requisition Workflow Steps are Grouped



Requester Notification Email: Requisition Submitted to Workflow

Once the Requester submits the requisition, the Requester will receive the following email notifying them that the Requisition was submitted and a PO will be generated.



Re: REQUISITION SUBMITTED FOR APPROVAL #: 212088795
 Cart Name: TEST MULT VENDOR
 Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

[View Requisition](#)

If you have any questions with regard to your requisition, please contact your Support Team.

Support Team Contact Information:
csubuy@calstate.edu

Thank you,
 The California State University (CSU)



Re: WORKFLOW ROUTING COMPLETED FOR REQUISITION#: 212088795
 Cart Name: TEST MULT VENDOR
 Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

The requisition listed above has completed workflow routing. Purchase Order(s) will be generated from this requisition. You can update and track the status of purchase orders on line by using "Document Search" or by selecting the URL below.

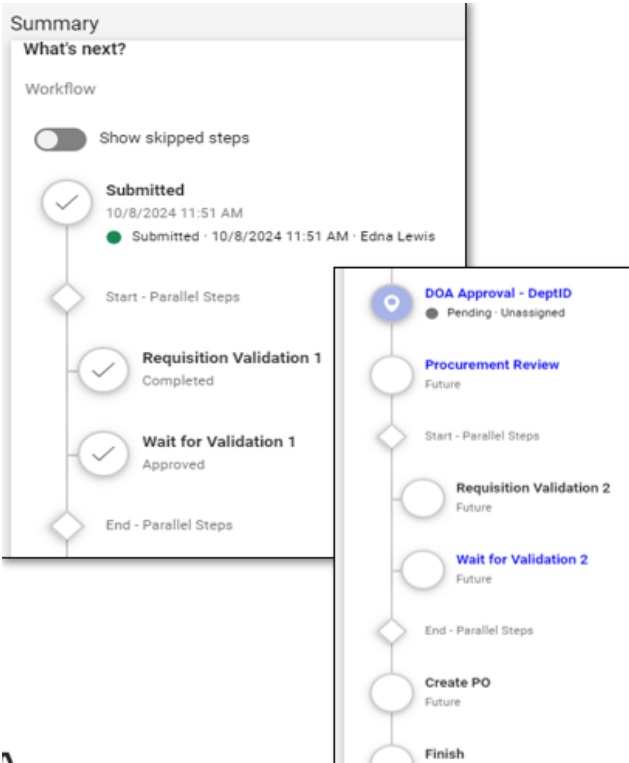
[View Requisition](#)

If you have any questions with regard to this requisition, please contact your Support Team.

Support Team Contact Information:
csubuy@calstate.edu

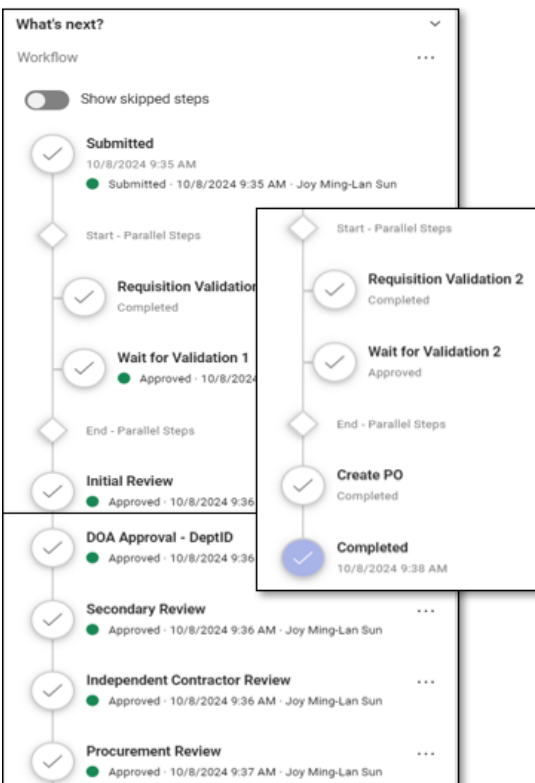
Thank you,
 The California State University (CSU)

Workflow in CSUBUY: Pending at DOA Approval



Workflow in CSUBUY: Completed

The following show the Requisition through PO Created. At this point, the PO is distributed to the Supplier.



Bypass DOA Approver

If the Requester is also the DOA Approver (Level 5) for the chartfield, any orders below \$5,000 will auto-approve, by passing the DOA Approver workflow.

Bypass Procurement Review

The following are circumstances when a Procurement Review is bypassed due to low dollar and minimal risk.

Low Risk Commodity Codes are ONLY: 145009, 145010, 145011, 145012, 170001, 170002, 170002, 170003, 170004.

Low Dollar/Low Risk Criteria	Concept Examples
<p>All three criteria must be met to bypass Procurement Review:</p> <ul style="list-style-type: none"> • Requisitions <\$5,000 • Punchout or catalog items • Low Risk Commodities <ul style="list-style-type: none"> <li style="width: 50%;">• Lab/Scientific Supplies <li style="width: 50%;">• Custodial Supplies <li style="width: 50%;">• Medical Supplies <li style="width: 50%;">• Facilities Supplies <li style="width: 50%;">• Office Supplies <li style="width: 50%;">• Housing Supplies <li style="width: 50%;">• Photography Supplies <li style="width: 50%;">• Industrial Supplies 	<p>Low Dollar/Low Risk Examples</p> <ul style="list-style-type: none"> • Staples punchout order for paper with total of \$2,800 • Fisher punchout order for beakers with total of \$4,999 <p>non-Low Dollar/Low Risk Examples</p> <ul style="list-style-type: none"> • Staples punchout order paper with total of \$5,002 • Staples punchout order for computer printer with total of \$1,000 • Staples G&S Form order for furniture with total of \$500

12-COMMODITY CODES & COMPLIANCE REVIEW/CREATE A RECEIPT

Commodity Code and Compliance Reviews

There are certain goods and services that require additional compliance reviews. The compliance review requirements are tied to the Commodity Code. Therefore, it is important to ensure the correct Commodity Code is entered into the Shopping Cart/Draft Requisition so that the appropriate review is done.

In addition, the Commodity Code indicates whether a Receipt (a confirmation the good is received) is required.


The list provides the Commodity Codes that require the Compliance Review and requirement to Create a Receipt for the good.

Commodity Code	Commodity Code - Description	Compliance Review	Receiving Type	Account Code	LB Account Description
100004	Group II Capital Assets		Create Receipt	607009	Group II Equipment - Cap Proj
105002	Equipment		Create Receipt	619001	Other Equipment
105003	Vehicles	Vehicle Review	Create Receipt	619001	Other Equipment
105004	Farm Equipment		Create Receipt	619001	Other Equipment
115002	IT Hardware	IT Review	Create Receipt	616002	I/T Hardware
115003	IT Hardware Maintenance	IT Review		616801	I/T Hardware Maintenance
115004	IT Software	IT Review & Accessibiliy/Security Review		616003	I/T Software
115005	IT Software Maintenance	IT Review & Accessibiliy/Security Review		616003	I/T Software
140004	Vehicle Lease/Rental Services	Vehicle Review		660937	Vehicle Lease
145007	Vehicle Maint/Repair Services	Vehicle Review		660932	Motor Vehicle Expense
145008	Chemical Supplies	EH&S Review		660003	Supplies and Services
150003	Works of Art		Create Receipt	660003	Supplies and Services
150006	Controlled Substances	EH&S Review	Create Receipt	660003	Supplies and Services
150007	Furniture	Facilities Review		619804	Furniture
150019	Weapons	Safety & Security Review	Create Receipt	619001	Other Equipment
160002	Legal Services	Legal Services		613803	Legal Services
160007	HazMat/Chemical Services	EH&S Review		605006	Hazardous Waste
160009	Safety/Security Services	Safety & Security Review		660003	Supplies and Services
170006	HazMat/Chemical Supplies	EH&S Review		605006	Hazardous Waste
170007	Safety/Security Supplies	Safety & Security Review		660003	Supplies and Services
180002	Library Books (Library Only)		Create Receipt	608001	Library Books (Lbry use only)
180003	Library Serials (Library Only)		Create Receipt	608003	Library Serials/Periodicals
180004	Library Periodicals (Library Only)		Create Receipt	608004	Periodicals
700004	Legal Settlement	Legal Services Review		660090	Expenses-Other

In most cases, the good that requires a Compliance Review will typically be purchased using a Form. The Form includes information that satisfies the Compliance Review. However, if a product is purchased from a PunchOut, the Compliance Reviewer may reach out to you for more information.

13-VERIFY RECEIPT OR CREATE RECEIPT


Once the Purchase Order is distributed to the Supplier/Vendor and the goods are received, the **Prepare For/Voucher Owner/PO Owner** (typically, the same person) must either **Verify Receipt** of the good or service or **Create a Receipt** for the good in CSUBUY.



2-Way Match
Receipt NOT Required.

PO Owner Approval (Verify Goods Received)

- The PO Owner approves the voucher **IF**:
 - It is NOT an Asset Item
 - It is NOT a High-Risk Commodity (below)
 - It is NOT identified as “Receiving Required”



3-Way Match
Receipt Required.

Receipt Requirement

- A receipt is required **IF** the item falls into any of these categories:
 - Asset Item
 - High-Risk Commodity (below)
 - Identified as “Receiving Required”
- Hold for Receiving will remain at 30 days

High Risk Commodities

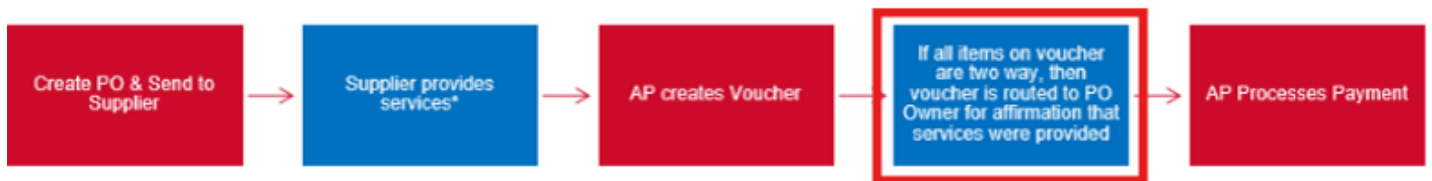
100004 Group II Capital Assets	105002 Equipment	105003 Vehicles	105004 Farm Equipment
115002 IT Hardware	150003 Works of Art	150006 Controlled Substances	150019 Weapons
180002 Library Books (Library Only)	180003 Library Serials (Library Only)	180004 Library Periodicals (Library Only)	

Important Note: The **Prepare For** person is usually the Shopper or Requester, that is, the person who created the Shopping Cart. In CSUBUY, the person who creates the Shopping Cart is the default **Prepare For** person. The Requester can edit this field and change the **Prepare For** to another person but only another Shopper or Requester role should be selected. The **Prepare For** person is also the **PO Owner** and the **Voucher Owner**.

Verify Receipt

Verify Receipt is part of the Voucher Workflow and is a means for Accounts Payable to know the good or service was received and therefore it is a confirmation that the vendor/supplier could be paid. Accounts Payable initiates the Voucher Workflow process by submitting an invoice from the supplier/vendor for the good. (Note, in some cases, an Auto Invoice is created without AP for certain types of POs.)

Verify Receipt is required for a good or service that requires a 2-way match.



The Voucher Owner, usually the Shopper/Requester (or Prepare For person) will receive a notification that a Voucher needs their Verify Receipt approval. If you are not receiving notifications, please go to your profile and turn Receipt notifications on. **Refer to Section 5 – Setting Up Notifications Preferences** in this guide. You may identify the Voucher that needs your receipt approved by going to Quick Links on the Home Page and click on My Vouchers.

As seen in the Workflow, the Voucher Owner is responsible to Verify Receipt confirming the good or service was received.


What's next? ▾

Workflow ...

- Submitted
9/25/2025 1:26 PM
Submitted · 9/25/2025 1:26 PM · Tu McClurg
- Calculate Tax
Completed
- Verify Received**
Pending · Michael McNairn-Chico
- AP Review
Future
- OK to Pay
Future
- Auto-Close-PO
Future
- Finish
Future

The Voucher Owner would open the Voucher.

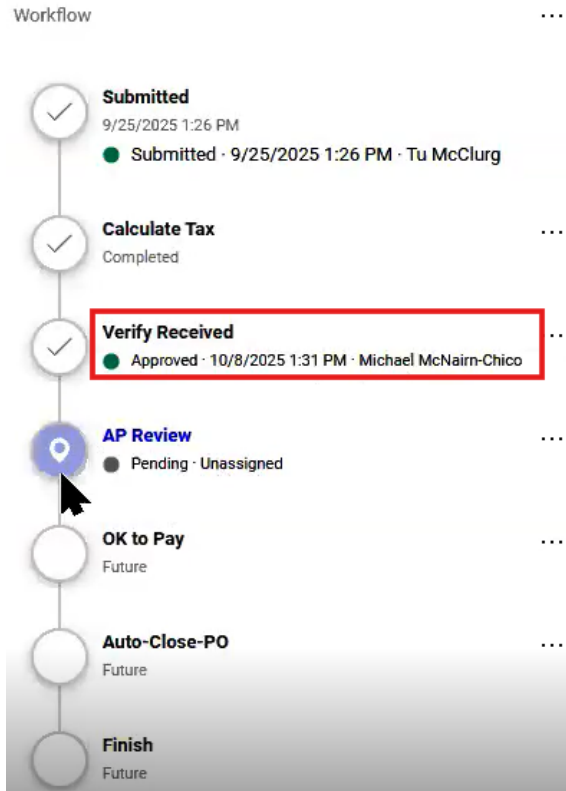
Voucher • [Acme Corporation](#) • C003024T

Summary	Tax Details	Matching	Supplier Messages	Comments 1	Attachments	History
Supplier Name	 Acme Corporation	Neil Mink 5151 State University Drive Chico, California 95926	Voucher by Business Unit	CH - Cal State Univ, Chico P2P (CHXCO)		
Supplier No.	1004408209	United States Email somebody@nobody.com Phone 1-302-5551234- Address Id 1	Voucher Number	C003024T		
Supplier Invoice No.	InvoiceAmountOnly	Discount, Tax, Shipping & Handling	Voucher Type	Voucher		
Invoice Date	9/25/2025	Discount, Tax, Shipping & Handling	Voucher Owner	Michael McNairn-Chico		
Accounting Date	9/25/2025	Discount, Tax, Shipping & Handling	Voucher Source	Manual		
Payment Terms	Net 30 (0% 0, Net 30)	Sales Tax 0.00 USD	Invoiced By	Tu McClurg		
Due Date	10/25/2025	Allocation Weighted	Invoice Received (mm/dd/yyyy)	no value		
Discount Date	no value					

The Voucher Owner would then click on Approve/Complete Step button in the Voucher as shown below:



When returning to the Voucher, the Workflow shows the Verify Received is approved:

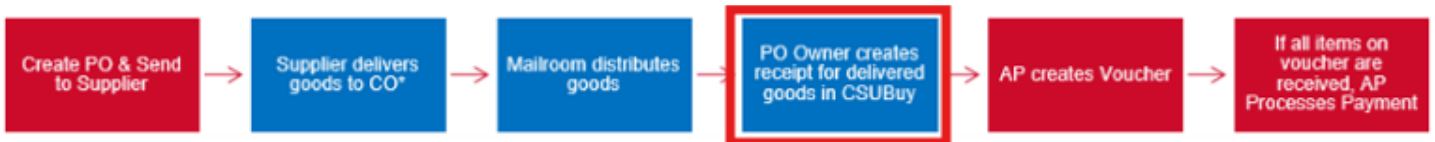


Create a Receipt

The Create a Receipt action is needed for certain goods which require a 3 Way Match.

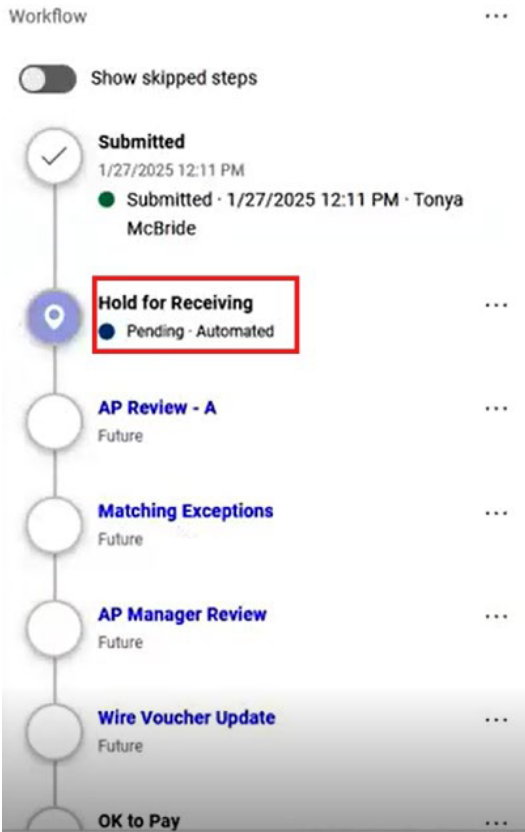
Create a Receipt action is taken when the good is received. Note that you can Create a Receipt even if the Voucher Workflow process has not been kicked off. This is because the Create a Receipt occurs in the Purchase Order and not the Voucher. However, the Voucher Workflow identifies whether the Receipt was created or not.

Below shows the process in which the PO Owner creates the receipt before the Voucher is created.



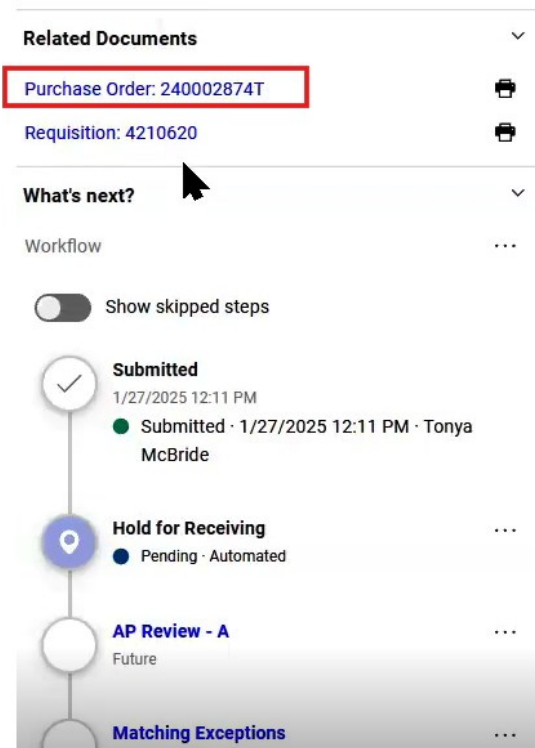
When creating a receipt, you may create a quantity receipt entering the number of items received or a cost receipt entering the cost of the service. Cost receipts are only for Amount-Only/Blanket PO. An example would be a PO for 100 hours of legal services in which the cost of the service would be entered into the receipt.

Examples of goods that require a Create a Receipt action are equipment, furniture, gasoline, etc. These goods have a commodity code that triggers the Hold for Receiving in the Voucher Workflow. Please see **Section 12 – Commodity Code and Compliance Review** for a list of all Commodity Codes that require a Receipt.



The Prepare For/Voucher Owner/PO Owner should create a receipt when the good is received.

To Create a Receipt, go to the Purchase Order. If you are in the Voucher Workflow, you could also find the Purchase Order under Related Documents:



In the Purchase Order, go to **Receipts**.

Purchase Order • [Acme Corporation](#) • 240006341T Revision 0

Navigation: Status | Summary | Revisions 1 | Confirmations | Shipments | Change Requests | **Receipts** | Vouchers | Comments | Attachments | History

General Information		Document Status	
Supplier Name	Acme Corporation	Requisition Number	4406630 view print
Purchase Order No.	240006341T	Workflow	✓ Completed (12/8/2025 4:46 PM)
Purchase Order Date	12/8/2025	PO Status	Open
Revision No.	0	Distribution Status	Sent To Supplier
Revision Date	12/8/2025	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view	
Owner Name	Minna Chang	Email (HTML Body)	somebody@nobody.com
Owner Email	minna.chang@csulb.edu	Distribution Date/Time	12/8/2025 4:46 PM

Then click on the **PLUS** sign:

Purchase Order • [Acme Corporation](#) • 240006341T Revision 0

Navigation: Status | Summary | Revisions 1 | Confirmations | Shipments | Change Requests | **Receipts** | Vouchers | Comments | Attachments | History

Records found: 0 +

There are no receipts for this PO.

The following box will pop up. Click on **Create Quantity Receipt** or a Cost Receipt may come up for Amount-Only/Blanket PO.

240006341T: Create Receipt ✕

Line	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	✓
1	--	--	Test Procurement Request: IT Hardware Request		EA	500.00	10 EA	5,000.00	✓

Create Quantity Receipt Cancel

Then the receipt document will appear. Enter information as needed in the document.

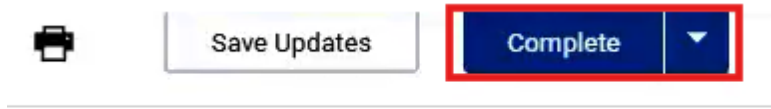
Go to the following section and confirm quantity and status and click on the check box as shown below:

PO • [240006341T](#) 🖨️ ☐

Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status	⊗ 🗑️ ☐
1	Test		10 0/EA	10	Received	☐

There is the option for Received, Returned, Cancelled

Then click on **Complete**:



The confirmation box then appears:

✔ Receipt Created

Summary	Next Steps
Receipt No 761895 	Create Qty Receipt
Created for the PO No(s) 240006341T 	


If the good needs to be **Returned**, communicate and coordinate the return directly with the supplier.

- **Things to keep in mind:**
 1. Reason for return:
 - Didn't want it
 - Ordered the wrong thing
 - Supplier shipping the wrong item
 - Broken/arrived damaged
 2. Shipping
 - Ship back the item
 - No need to ship back
 - Enter Receipts/Returns to match method of return
 3. Billing
 - Replaced at no charge
 - Credited, then rebilled
 4. Enter comments on PO to communicate: AP, Procurement, Shipping & Receiving and Requester
 5. Each supplier handles returns a little differently

If the Order was cancelled, please select **Cancel** in the Receipt.

You will notice that there is a Receipt in the PO (note in this example, there is no Voucher created yet).

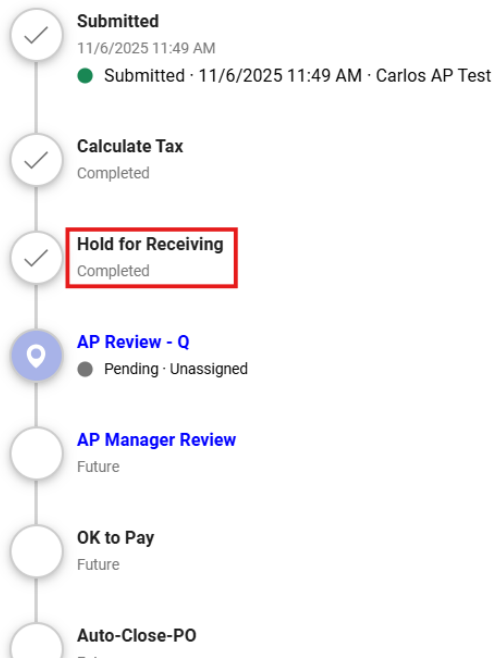
Purchase Order • [Acme Corporation](#) • 240006341T Revision 0

Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests	Receipts 1	Vouchers	Comments
General Information				Document Status				
Supplier Name	 Acme Corporation			Requisition Number	4406630 view print			
Purchase Order No.	240006341T			Workflow	✔ Completed <small>(12/8/2025 4:46 PM)</small>			
Purchase Order Date	12/8/2025			PO Status	Open			
Revision No.	0			Distribution Status	Sent To Supplier			

If there is a Voucher, when going back to the Voucher Workflow, the Hold for Receiving is completed.

What's next?

Workflow



NOTES:

Create a Receipt is always done by a person who has a **Receiving Role**. **ALL Shoppers and Requesters have been given the Receiving Role** at CSULB so that it is the Shoppers and Requester's responsibility to Create a Receipt when the good or goods are received.

A 3-Way PO will remain in "Hold for Receiving" for 30 days in AP Voucher workflow. After 30 days the Voucher will move to AP Review automatically.

A 2-Way PO will stay in "Verify Received" in AP Voucher workflow indefinitely.

Note: Documents such as the packing slip, etc., do not need to be uploaded into CSUBUY. Your indication that the item has been received is all that is required. You are welcome to attach any receiving related document you would like at your discretion.

Only a portion of the order has arrived.

Example: 10 items were ordered, 8 items arrived, 2 items were backordered.

Wait to receive items once all items have arrived and then input a quantity of 10 items were received. However, the vendor may want to be paid for the 8 items that were delivered. A receipt would need to be created for the 8 items received. The PO will stay open, showing there are 2 more items to be received. Accounts Payable will process the payment and will not close the PO. Once the other 2 items arrive, you will add another receipt line for the 2 remaining items. If you decide that you no longer want the remaining 2 items as it may take too long to receive them, then you will initiate a change request to modify the quantity to 8, from 10, providing an explanation for the change.

14-SUPPLIERS

To do business with and make purchases from a New or Existing Supplier in **CSUBUY**, they must be registered, approved, and extended to CSULB Campus and one of its **Business Units: LBXMP, LBXDN, LBX49**.

If an approved Supplier exists in **CSUBUY** although **not** active for shopping with any of our Campus Business Units, an **“Invitation Extension”** is required.

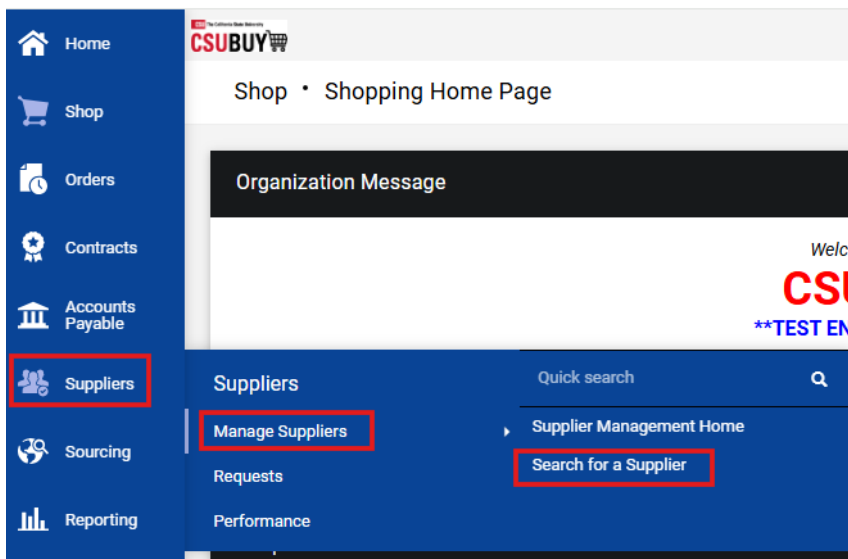
To determine if a Supplier is **extended** to Cal State Long Beach or a specific Business Unit:

1. Identify if a Supplier is Approved and Active in **CSUBUY**
2. Identify if a Supplier is Active for CSULB Campus and its Business Units

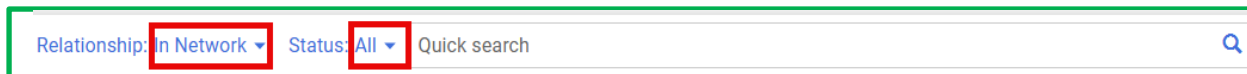
Search for a Supplier

Navigate to the Suppliers Flyout.

Select: **Suppliers > Manage Suppliers > Search for a Supplier**



Set Search Filters as follows. **Relationship: In Network** and **Status: All**.



Enter the Supplier name in the Quick Search Field.

A List of **‘In Network’** Suppliers will appear displaying their **current registration status**.

Note: In the drop-down, never choose Out of Network – this takes you to all suppliers within Jaggaer, by using In Network, you are only seeing suppliers available for use by the CSU.

Note: Not all vendors in CFS are in CSUBUY. With the implementation of CSUBUY, a vetted list of suppliers was sent to the Chancellor’s Office CSUBUY team to be reviewed and added into CSUBUY.

		17th & Montgomery LLC		11/7/2025 3:37:14 PM	1010006587	Approved	Solicited	10/1/2025	Non-Catalog
--	--	-----------------------	--	----------------------	------------	----------	-----------	-----------	-------------

Registration Status: “Invited” indicates the Supplier has **not started** the onboarding process. “In Progress” indicates the Supplier has not completed the onboarding process.

The following illustrates the definition for each Registration **Status**.

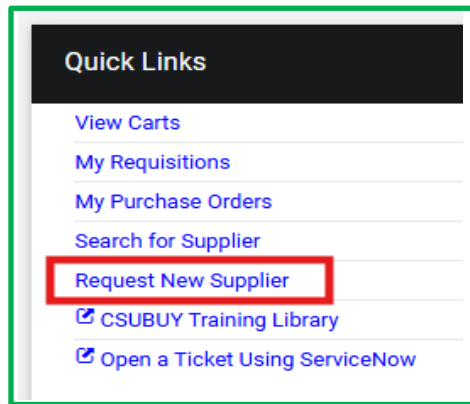
Registration Status	Definition
None	Loaded, not invited
Invited	Registration invitation sent to supplier
In Progress	Supplier has created a login and may or may not have started registration
Profile Complete	Supplier has submitted registration
Approved	Supplier profile has been approved through registration workflow
Status:	Definition
Enabled for Procurement	Active for Shopping
Not Enabled for Procurement	Inactive for Shopping
CSUBUY Network Relationship	
In Network	Search results should be limited to “In Network”

Tips:

1. Do **NOT** resend an invitation to a Supplier with a status that still reads “In Progress.” (Instead, follow up directly with the Supplier).
2. Resend an invitation to a **different email address IF:**
 - a. **Requested by** the Supplier
 - b. **AND** status is still listed as “Invited”
3. If a Supplier has registration questions or concerns beyond the scope of the Campus Supplier Team, they should email: CSUBUY-suppliersupport@calstate.edu for additional support.
4. If they cannot access their profile and/or have forgotten their login credentials and need to reset their password, they should contact: [Jaggaer Support](#)

Supplier Not Listed - Request a New Supplier:

Complete a “Request a New Supplier” Form when a Supplier does **not** exist in **CSUBUY**. Navigate to the Shopping Home Page. Select: **Suppliers > Requests > Request New Supplier**. Or click on the **Quick Link** located at the top right of Shopping Home Page:



Supplier Approved but Not Active for CSULB Business Unit(s) - Extend Invitation to Supplier:

Confirm if they are Active for Cal State Long Beach Business Units **Before** proceeding.

Click on the Company Name for details:

		17th & Montgomery LLC		11/7/2025 3:37:14 PM	1010006587	Approved	Solicited	10/1/2025	Non-Catalog
--	--	---	--	-------------------------	------------	----------	-----------	-----------	-------------

To determine if a Supplier is active for **Business Units LBXMP, LBXDN, and/or LBX49 (restricted use)** Generally, vendors request should be done in LBXMP when using LB49R funding. You want to use the Persona that you will be using to shop in.

Supplier 360 - Click on the **Active Business Unit(s) Hyperlink**. All Business Units associated with such Supplier will appear.

The example demonstrated below lists only a single **Business Unit (SOXMP)**.

To add **LBXMP**, please note the following information as it is required to complete the extension invitation:

Legal Name and Supplier Number

Supplier 360

Supplier Details

- In Network
- Active for Shopping
- Enabled for Contracts
- Non-Catalog

17th & Montgomery LLC

Legal Name: 17th & Montgomery LLC

DBA: 17th & Montgomery LLC

Aliases:

Supplier No.: 1010006587

3rd Party Ref No.: -

Active Business Unit(s): SOXMP-1010006587

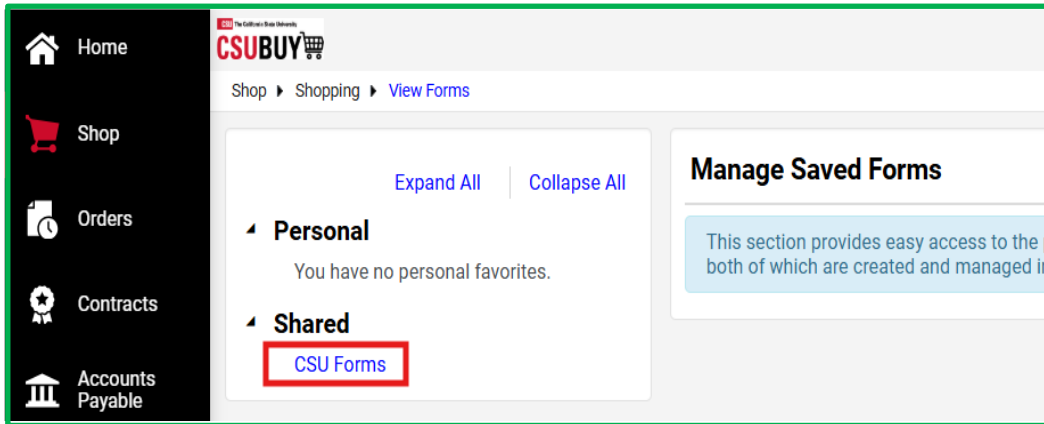
Date of Last Order: 11/14/2025

Registration Status: Approved

Extending an Invitation for an Approved Supplier Not Yet Active for CSULB Business Units:

Navigate to the Flyout and select: **Shop > Shopping > View Forms**

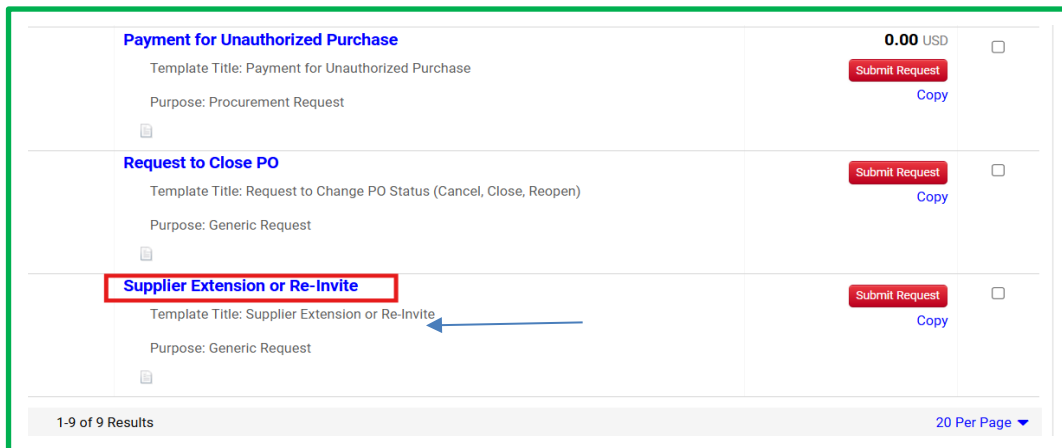
Select **CSU Forms**.



Select **Supplier Extension or Re-Invite**

Use this Form to:

1. Extend a Business Unit for an Approved Supplier.
2. Resend a registration invitation to the **same** email address used in the initial invitation.



Select the following option:

What are you requesting? ★ ⓘ

Resend an invitation to the same email address that was previously invited

Extend an existing CSUBUY supplier to new campus

Enter the noted **Legal Name** and **CSUBUY Supplier Number** and answer the remaining questions. Submit.

Required Fields are designated with a **Star ***

Which Long Beach business unit needs to use this extended supplier? ★ LBXMP - CA State University Long Beach P2P LBXDN - CSULB Research Foundation P2P LBX49 - Long Beach State Foundation P2P

Do you need to use the supplier for a PO or Invoice Payment within 1-2 business days? ★ Yes No

Suppliers Legal Company Name ★

CSUBUY Supplier Number ★

Select the type of products and/or services the supplier will provide. ★ Vendor will provide a service, labor, or installation on campus/in California. Vendor will provide a service remotely. Vendor will provide goods. Vendor will create custom goods (branded/promotional, commissioned art, floral arrangements, etc.)

Provide additional details of the products and/or services the supplier will provide you.

2000 characters remaining

Will the extension require additional addresses? Fulfillment Remit

Fulfillment: Purchase Order Delivery Address

Remit: Check Remittance Address

To Resend a registration invitation to the **same** email address, select the following option:

Request Type

What are you requesting? ★ ⓘ

Resend an invitation to the same email address that was previously invited

Extend an existing CSUBUY supplier to new campus

Enter the noted **Legal Name** and **CSUBUY Supplier Number**. Submit.

Resend Invitation: Supplier Information

Suppliers Legal Company Name ★

CSUBUY Supplier Number

The request for a supplier may be rejected. If that were to occur, the requester must view the reason for rejection to determine next steps.

A. Requesters can view the details by navigating to the Supplier Flyout > Requests > My Supplier Requests:

My Supplier Requests

Filter Supplier Requests

Requested Supplier, Template Name

Request Status *

- Approved
- Returned
- Incomplete
- Under Review
- Rejected
- Completed

Include public Supplier

Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	Actions
	-	1/22/2026 8:30 AM	1/20/2026 2:55 PM		-	Actions
Impex Technologies Inc.	CSU New Supplier Request	Rejected	10/28/2025 12:12 PM	10/28/2025 11:57 AM	-	Actions
Sunpower Corp LLC	CSU New Supplier Request	Rejected	10/28/2025 3:51 PM	10/28/2025 3:07 PM	-	Actions

Click on View in the Actions dropdown menu:

Actions

- View

Click on the three dots to view dropdown menu and select History:

Supplier Request • Impex Technologies Inc.

Instructions Questions Requester Contact Information

Instructions

Use this form to:

- Request the setup of a new supplier for purchases and/or payments.
- Request the setup of a Contract-only profile when no payment will be issued.

DO NOT use this form to register CSU Employees or Students, or reimbursement-only suppliers.

Additional Information for New Supplier Setup

FULL SUPPLIER PROFILE TO ISSUE PAYMENT:

Requests to setup a new supplier will require the supplier to complete a registration and provide important information such as legal structure, company financials and tax. **Please provide an email for a supplier contact who can accurately complete these details.** This component is key to expedite the registration process. Please contact your supplier's representative to ensure that they can provide this information. If they can't, they should be able to provide you with the email address of someone who can.

The submitted request will be evaluated to identify whether the supplier should be invited to register into the CSU Supplier Master. The evaluation may result in:

- A recommended alternative CSU Supplier who can provide the goods and/or services requested.

Summary

Rejected

Impex Technologies Inc.

Template CSU New Supplier Request

Request Status Rejected

What's next?

Workflow

- Submitted 10/28/2025 12:02 PM
- CSU Supplier Mgmt. Review Rejected - 10/28/2025 12:12 PM - Kathryn Kuhnert

View Notes:

Impex Technologies Inc. • History

Export

mm/dd/yyyy

Start Date

mm/dd/yyyy

End Date

All Actions

Action

Filter

Clear

1-16 of 16 Results

40 Per Page

Date ↓	User	Action	Section	SubSection	Context	Field	Old Value	New Value	Note
10/28/2025 12:12:06 PM	Kathryn Kuhnert	Request Rejected			Supplier Registration Workflow: CSU Supplier Mgmt. Review				Hello! This supplier is already invited with the same email. I have initiated a reinvite of the existing supplier in the network. Thank you!
10/28/2025 12:12:06 PM	System	Request Rejected			Supplier Registration Workflow				
10/28/2025 12:10:39 PM	Kathryn Kuhnert	Request Assigned			Supplier Registration Workflow: CSU Supplier Mgmt. Review				
10/28/2025 12:02:44 PM	System	Request Submitted			Supplier Registration Workflow				
10/28/2025 12:02:44 PM	Norma Rothman	Modified			CSU New Supplier Request	Review and Complete	Incomplete	Under Review	
10/28/2025 12:02:33 PM	Norma Rothman	Modified	Company Overview	Additional New Supplier Request Details	Email Address		empty	tgalleano@impextechnologies.com	

B. Or, click on the **red** link within the email they receive from CSUBUY to view details:

CSUBUY <noreply@jaggaer.com>
To Norma Rothman



1/16/2026

- This sender noreply@jaggaer.com is from outside your organization.
- Follow up. Start by Tuesday, January 20, 2026. Due by Tuesday, January 20, 2026.
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.



RE: Form Request Workflow for Supplier Extension or Re-Invite has been Rejected

Dear Norma Rothman,

Your request for Supplier Extension or Re-Invite has been rejected.

Note: To view the reason for the rejection, click the link below to open your request form, then click the blue "History" link in the top right corner of the form. For New Supplier Request forms, a rejection does not always mean that the supplier was not invited to join CSUBUY.

[Click here to view the request in your organization's site](#)



Click on either the message icon or three dots to view details under History:

View Notes for details:

1-10 of 10 Results 40 Per Page

Date ↓	User	Action	Section	SubSection	Context	Field	Old Value	New Value	Note
1/16/2026 3:17:12 PM	Margot Martin	Request Rejected			Form Request Workflow: SM System Admin Review				Hello! This supplier cannot be re-invited because their profile is already in In-Progress status. This indicates that the original invitation has already been accepted by the supplier, and they have created sign-in credentials. If they need to reset their password, they can do so at https://solutions.sciquest.com/apps/Router/SupplierPasswordReset?CustOrg=CalStateUniv&GSPSupplier_PasswordReset . If they need assistance recovering or updating their CSUBUY credentials, they can contact Jaggaer Supplier Support at 800-233-1121. Thank you!

Quick Summary:

Send an invitation if:

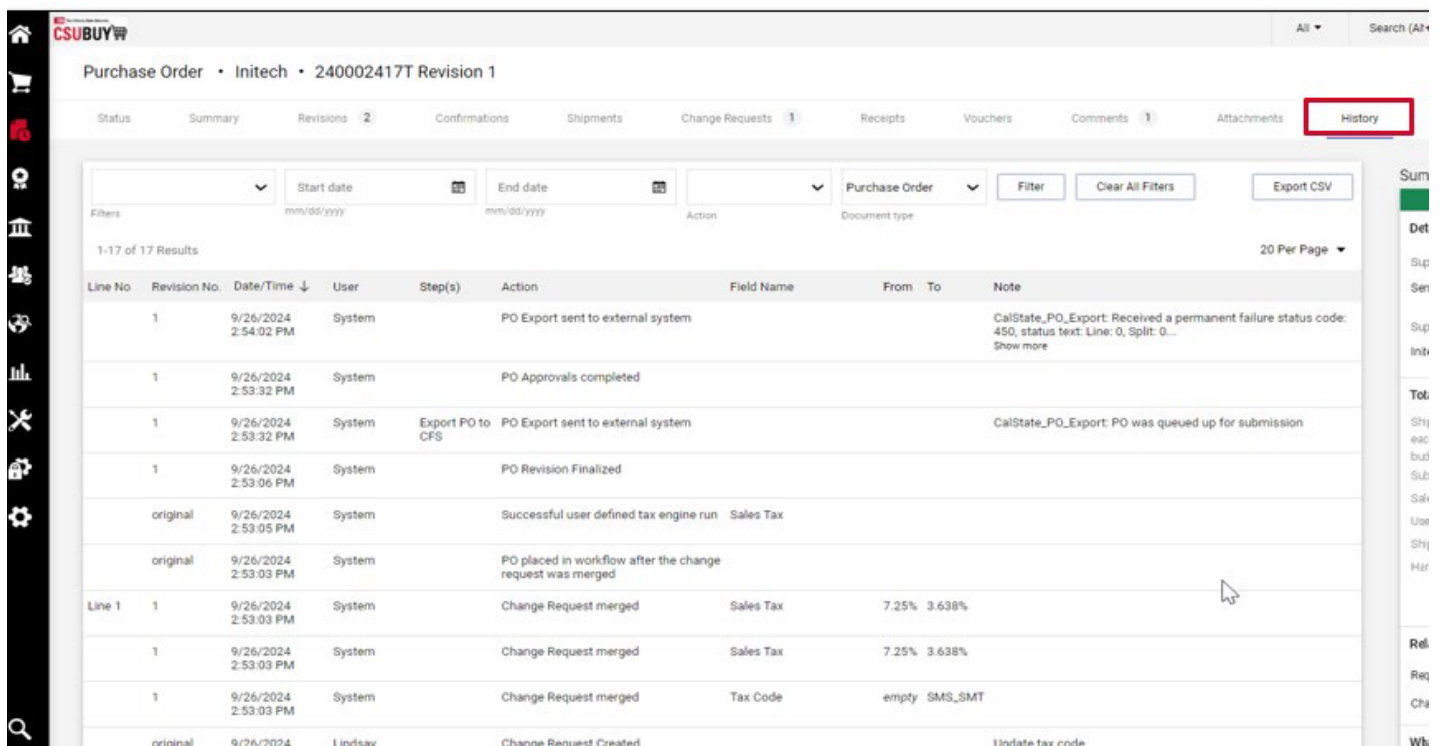
- Supplier is using a different email address than the one for a supplier already listed in CSUBUY.
- Supplier does not exist in CSUBUY.
- Supplier exists but not in Network.

Use the CSU Form for:

- Extensions
- Invitation and has the same email address you were provided with by the supplier.

15-HISTORY AND RESOLVING RETURNED REQUISITION

The History tab provides a detailed log of all actions and events related to the Requisition/Purchase Order.



Purchase Order • Initech • 240002417T Revision 1

Status Summary Revisions 2 Confirmations Shipments Change Requests 1 Receipts Vouchers Comments 1 Attachments History

Filters: Start date (mm/dd/yyyy), End date (mm/dd/yyyy), Action, Document type, Purchase Order, Filter, Clear All Filters, Export CSV

1-17 of 17 Results 20 Per Page

Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
1		9/26/2024 2:54:02 PM	System		PO Export sent to external system				CalState_PO_Export: Received a permanent failure status code: 450, status text: Line: 0, Split: 0... Show more
1		9/26/2024 2:53:32 PM	System		PO Approvals completed				
1		9/26/2024 2:53:32 PM	System	Export PO to CFS	PO Export sent to external system				CalState_PO_Export: PO was queued up for submission
1		9/26/2024 2:53:06 PM	System		PO Revision Finalized				
original		9/26/2024 2:53:05 PM	System		Successful user defined tax engine run	Sales Tax			
original		9/26/2024 2:53:03 PM	System		PO placed in workflow after the change request was merged				
Line 1	1	9/26/2024 2:53:03 PM	System		Change Request merged	Sales Tax	7.25%	3.638%	
	1	9/26/2024 2:53:03 PM	System		Change Request merged	Sales Tax	7.25%	3.638%	
	1	9/26/2024 2:53:03 PM	System		Change Request merged	Tax Code	empty	SMS_SMT	
original		9/26/2024	Lindsay		Change Request Created				Update tax code.

Information includes Date/Time stamp, User, Action, and Notes along with the ability to export the information. You could then make the corrections in the draft cart and resubmit.

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	12/10/2025 2:03:57 PM	System		Requisition returned		System	Juanito Compras	Line: 1, Split: 0 - Requestor does not have access to GL BU: FRSNO Line: 1, Split: 1 - Invalid Ch... Show more
	12/10/2025 2:03:48 PM	System	Requisition Validation 1	Message transmission to external system was successful.				
	12/10/2025 2:03:47 PM	System		Successful use tax callout to tax engine.	Sales Tax			
	12/10/2025 2:03:45 PM	Juanito Compras		Requisition submitted				
Line 1	12/10/2025 2:03:16 PM	Juanito Compras		Requisition modified	DeptID	empty	10000_FRSNO	

Resolve a Returned Requisition

The History tab is useful to resolve a returned requisition that has been kicked back by CFS.

A returned requisition is located in your draft carts. You will also receive an email indicating that the requisition was returned.

Cart Management											
Draft Carts	Assigned Carts										
<p>Filter Draft Carts</p> <table border="1"> <thead> <tr> <th>Type ▲</th> <th>Cart Number ▲</th> <th>Shopping Cart Name ▲</th> </tr> </thead> <tbody> <tr> <td>Normal - Returned</td> <td>4429672 Active</td> <td>2025-12-10 ccampostest 01</td> </tr> <tr> <td>Normal</td> <td>4429709</td> <td>2025-12-10 ccampostest 02</td> </tr> </tbody> </table>			Type ▲	Cart Number ▲	Shopping Cart Name ▲	Normal - Returned	4429672 Active	2025-12-10 ccampostest 01	Normal	4429709	2025-12-10 ccampostest 02
Type ▲	Cart Number ▲	Shopping Cart Name ▲									
Normal - Returned	4429672 Active	2025-12-10 ccampostest 01									
Normal	4429709	2025-12-10 ccampostest 02									

When opening the draft cart for the returned requisition, see the History tab. In the Note, you will see the reason why the requisition was returned.

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	12/10/2025 2:03:57 PM	System		Requisition returned		System	Juanito Compras	Line: 1, Split: 1 - Invalid ChartField combination FUND_CODE/ ACCOUNT in combo group CSU_LGLEDI Show less

For this type of error, which is a combo edit error, see **Section 9 – Draft Requisitions: Chartfields, Sub Section – Chartfield Combination Edit Errors.**

You could then make the correction in the draft cart and resubmit.

CHAPTER 3: MAKING CHANGES BY SHOPPER/REQUESTER

1-CHANGING PERSONAS IN A SHOPPING CART

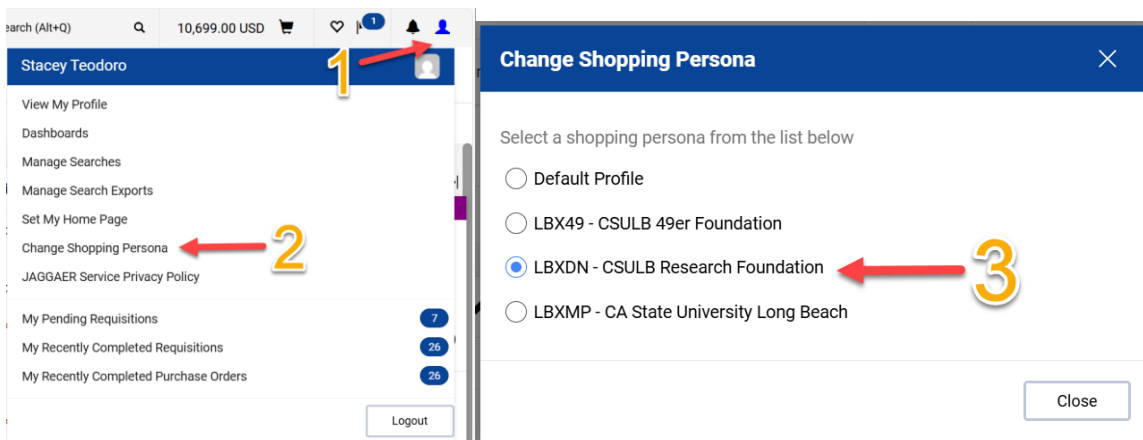
Your Profile includes a Persona setting. A Persona indicates the Business Unit from which you are purchasing. CSULB has the following Persona available:

- LBXMP – CA State University Long Beach
- LBX49 – Long Beach State Foundation (restricted use only)
- LBXDN – CSULB Research Foundation

If you are shopping and realize you are not in the correct business unit, you may change Personas before checking out your cart.

Use LBXMP Persona when using LB49R Business Unit funding.

In your shopping cart, or in the draft requisition, select the Profile User Icon. Select **Change Shopping Persona**. Select the correct shopping persona.



The Workflow of the draft requisition may notify you of issues that need to be addressed, such as changing the billing address or funds. Update all necessary information and submit or assign the draft requisition as normal. You can verify your persona by clicking the User Icon again.

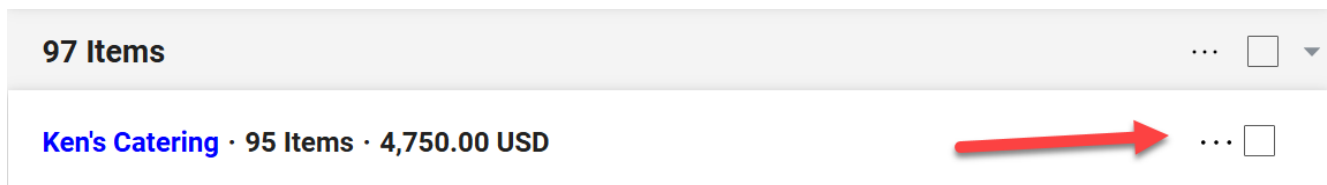
NOTE: This is the only time the user can change the Business Unit. Once you check out your cart, the Business Unit cannot be updated, and the end user will have to cancel the cart and start over using the correct Business Unit.

2-SHOPPING CART (DRAFT REQUISITION) CHANGES

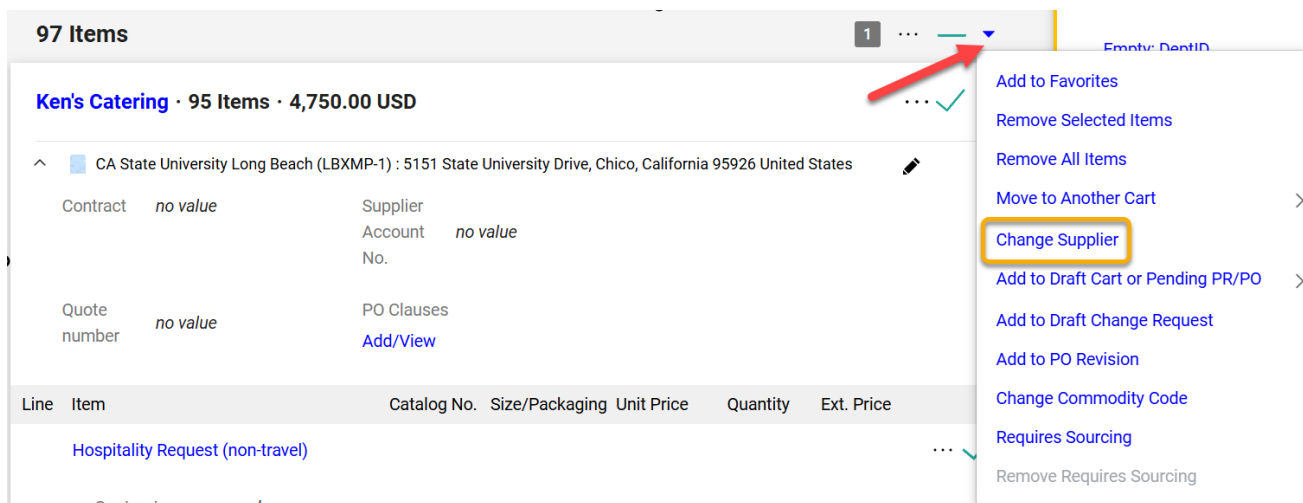
Before you submit your shopping cart, you can make changes in the shopping cart (draft requisition) such as changing the supplier, removing items, changing the quantity, and moving items to another cart.

Changing a Supplier

If you prefer to shop with a different supplier, you can change suppliers even after you have items in your cart. From the Draft Requisition page, select the check box next to the supplier's name.



Select the dropdown carrot next to the checkbox and select **Change Supplier**



Search for a supplier in the search bar and select a new supplier.
Keep in mind that selecting a new supplier may change products and costs.

Change Supplier ✕

Existing Supplier

Select Supplier

★ Required fields

Removing Line Items from the Shopping Cart (Draft Requisition)

From your draft requisition, before assigning your cart or submitting the request, scroll down to the item you want to remove. Select the checkbox of the item you want to remove.

Steller Services · 2 Items · 6,500.00 USD ...

CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States ✎

Contract *no value* Supplier Account *no value*
No.

Quote number *no value* PO Clauses
[Add/View](#)

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	Hospitality Request (non-travel)					
	Contract:	<i>no value</i>				

1 →

Scroll to the top where the total amount of items in your cart is listed. Select the dropdown carrot. Click **Remove Selected Items**.

97 Items Scroll to the top of the cart 1 ... ▾ Required: Fund

Ken's Catering · 95 Items · 4,750.00 USD ...

CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States ✎

Contract *no value* Supplier Account *no value*
No.

Quote number *no value* PO Clauses
[Add/View](#)

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	Hospitality Request (non-travel)					

2 →

- Add to Favorites
- Remove Selected Items** 3
- Remove All Items
- Move to Another Cart >
- Change Supplier
- Add to Draft Cart or Pending PR/PO >
- Add to Draft Change Request
- Add to PO Revision
- Change Commodity Code
- Requires Sourcing
- Remove Requires Sourcing

Your cart will be updated to show that you removed items from your cart.

Changing Quantities in the Shopping Cart (Draft Requisition)

From your draft requisition go to the line item to change.

Select the Hyperlinked form.

CSUBUY

All Search (Alt+Q)

Requisition • 4419442

Summary Taxes/S&H PO Preview Comments Attachments History

Ad-Hoc Approver [Add](#)

97 Items

Ken's Catering • 95 Items • 4,750.00 USD

CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract *no value* Supplier Account No. *no value*

Quote number *no value* PO Clauses [Add/View](#)

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	lunches for summer picnic		EA	50.00	95 EA	4,750.00

This will redirect you to the Request Form.

Select the 'Cost Details' tab to the left and adjust the amount you intend to purchase.

CSUBUY

All Search (Alt+Q) 11,748.75 USD

Shop Shopping View Forms Logout

Back to Requisition

Hospality Request (non-t...

Form Number 1213273
Purpose Procurement Request
Status On Document

Instructions

Suppliers ✓
Form Fields ✓
General Information ✓
Cost Details ✓
Review and Submit

Instructions

Utilize this form to initiate a request for Hospality (non-travel). Examples are:

- Award or Service Recognition
- Farewell Event
- Venue
- Catering
- Morale Function
- Entertainment Services
- Participation Incentive
- Farewell Award
- Promotional Items
- Other

This form should not be used if the request:

- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for Goods and Services (non-IT). See Goods & Services Request Form.
- Is for services provided by an individual who is self-employed, guest speaker, or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice.
 - Note: only applicable to campuses with Direct Pay.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Note: A supplier must be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this.

Next >

Review (4), save progress (5), and select **Back to Cart** (6).

Form Fields - Cost Details

On This Page: Quotes & Other Attachments (4), Cost Details (6)

Quotes & Other Attachments: Please upload the quote(s) you received along with all required documentation for this request.

Do you have documentation to attach? * Yes No

Please upload quote(s) and all required documentation as internal attachments on the Requisition.

Cost Details

Catering Cost

Unit Price *	50.00	USD	Quantity *	76	Total	3,800.00 USD
--------------	-------	-----	------------	----	-------	--------------

Unit of Measure * EA - Each

Product Description * lunches for summer picnic (975 characters remaining)

Taxable Yes

Catalog No.

Commodity Code * 158001 - Catering Services

Buttons: < Previous, Save Progress, Next >

Your cart will update with the new number of items.

Shopping Cart • Shopping Cart



Go to: Favorites | Forms Browse: Suppliers | Categories | Contracts

Simple | Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name: 2025-11-21 40000300731 02

Deliver To Location: BH-155_LBCMP

78 Items

Ken's Catering · 76 Items · 3,800.00 USD

SUPPLIER DETAI... 7 ... CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract no value

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Hospitality Request (non-travel)						

Notice that the cart amount has changed from 95 to 76. From here, review your cart and chartfield and submit or assign your shopping cart.

Add to Favorites

Before assigning your cart or submitting the request, scroll down to the items you want to Favorite and select the checkbox.

The screenshot shows a shopping cart summary for 'Steller Services' with 2 items and a total of 6,500.00 USD. Below the summary is a header for 'CA State University Long Beach (LBXMP-1)'. The main content area contains a table with columns: Line, Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. The first row is for 'Hospitality Request (non-travel)'. A red arrow points from the 'Quantity' column to a dropdown menu icon (three dots in a square) at the end of the row. A yellow number '1' is placed above the arrow.

Scroll to the top where the total amount of items in your cart is listed and select the dropdown carrot. Click **Add to Favorites**.

The screenshot shows a shopping cart summary for 'Ken's Catering' with 95 items and a total of 4,750.00 USD. Below the summary is a header for 'CA State University Long Beach (LBXMP-1)'. A dropdown menu is open, showing options: 'Add to Favorites', 'Remove Selected Items', 'Remove All Items', 'Move to Another Cart', 'Change Supplier', 'Add to Draft Cart or Pending PR/PO', 'Add to Draft Change Request', 'Add to PO Revision', 'Change Commodity Code', 'Requires Sourcing', and 'Remove Requires Sourcing'. A red arrow points from a dropdown icon (labeled with a yellow '2') to the 'Add to Favorites' option (labeled with a yellow '3'). A yellow '1' is also present near the top of the cart summary.

A pop up will appear where you can edit the Nickname and location of the save items. Select **Save Changes**.

Move to Another Cart

If you would like to move a line item to another cart to make a separate purchase, select the check box next to the supplier's name.

From the dropdown carot next to the checkbox and select **Move to Another Cart**.

You can move to an existing draft cart or to a new cart entirely.

You can view all your Draft Carts from the 'Shop' flyout.



Select 'My Carts and Orders' > 'View Carts' > Draft Carts'

Cart Management

Draft Carts Assigned Carts

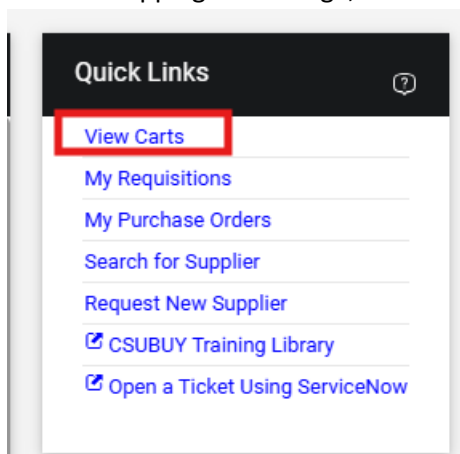
> Filter Draft Carts

Type ^	Cart Number ^	Shopping Cart Name ^	Cart Description	Date Created ^	Total ^
Normal	4366822 Active	2025-09-25 40000300731 02		9/25/2025	48,262.50 USD
Normal	4370131	2025-10-01 40000300731 01		10/1/2025	72,000.00 USD
Normal	4386889	2025-10-24 40000300731 01		10/24/2025	0.00 USD

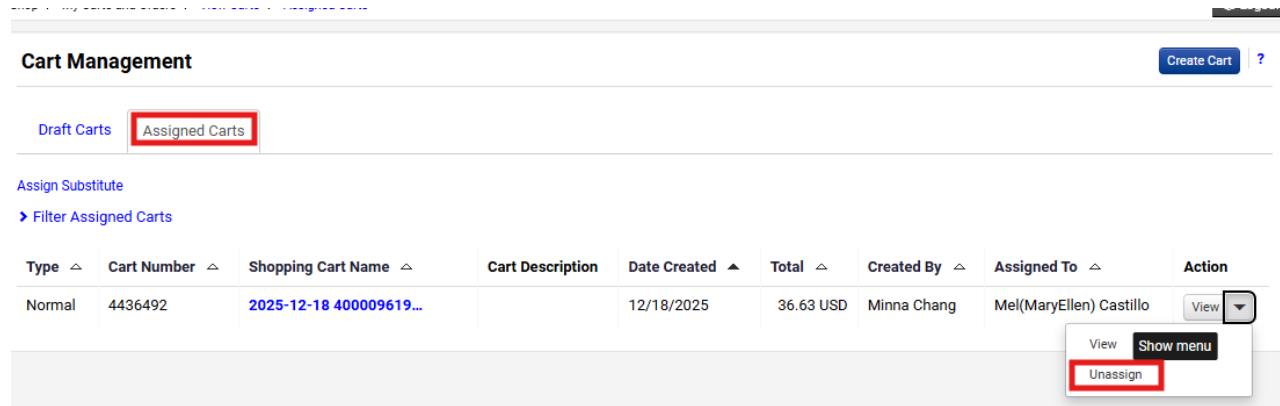
3-MAKING CHANGES AFTER SHOPPING CART IS ASSIGNED OR SUBMITTED

If a Shopper has already assigned the Shopping Cart to a Requester or a Requester submitted the Shopping Cart to workflow, there are options available to make adjustment to your order. You must first identify where your order is in the workflow process.

1. If you are a Shopper, review your Assigned Carts list to see if your order is still an Assigned Cart. On the Shopping Home Page, in the Quick Links section, select View Carts.

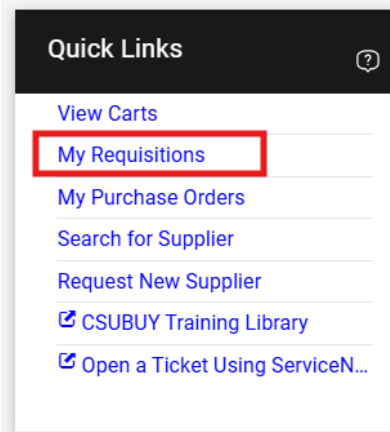


Click on the Assigned Carts tab. If you see the Shopping Cart you would like to make change in, then select Unassign. This will then revert back to a Shopping Cart in which you could make changes.



- If a Shopper is unable to see the order in the Assigned Carts tab, the Requester has already submitted the Shopping Cart to workflow. The order is now a Requisition. To amend the order, you must first locate the Requisition.

From the Shopping Home Page, go to the Quick Links and select My Requisitions.



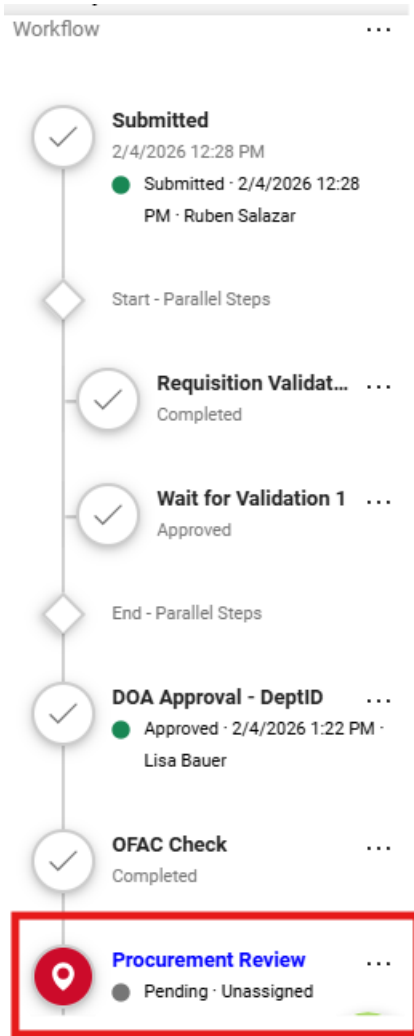
From the list, identify the Requisition in which you would like to make changes and click on the blue hyperlink.

Prepared For: Chang, Minna

1-3 of 3 Results

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For
4377324	Acme Corporation	Test for Receiving Required Checked Off	Completed	Minna Chang
4406630	Acme Corporation	IT Hardware Commodity Code- Test Receiving Role	Completed	Minna Chang
4419441	Acme Corporation	Test for Verify Receipt for Shopper	Completed	Minna Chang

When you open the Requisition, you will be able to see where it is in the workflow process. In the example below, the Requisition is at Procurement Review.



At this stage of the process, your only course of action is to add/send a comment informing Procurement of the need to make a change in the order. Please send the comment to the Requester, Approver, and the Procurement Reviewer (if not unassigned) to inform all regarding the need for the correction in the order. If unassigned, Procurement will be able to read the comment during review. Procurement will determine the best course of action to make the needed change. They may also send the Requisition back to the Approver and/or Requester from them to make the needed change.

If the Requisition is with the DOA Approver, add a comment to be sent to the Requester and DOA Approver informing them of the need to make a change to the order. The DOA Approver could then send the Requisition back to the Requester to make the change.



Summary Taxes/S&H PO Preview **Comments** Attachments History

Records found: 0 Show comments for: All

ADD COMMENT ✓ ✕

1000 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Lisa Bauer (Approved) <lisa.bauer@csulb.edu>

Ruben Salazar (Prepared by, Approved) <ruben.salazar@csulb.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name:

File:

- When you open the Requisition and see that the workflow is complete, your order now has a PO and/or Voucher. If your order only has a PO, you may request a change in the PO (see next Section for instructions). If your order has a Voucher, you may no longer make any changes. The order has been fulfilled.

On the Requisition, you could see the related documents and click on the blue hyperlink to open the document. In this example, because there is a Voucher for the order, no change can be made to the order.

Summary →

Completed

Total (11,050.00 USD) ▾

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	10,000.00
Sales Tax	1,050.00
Use Tax	0.00
	11,050.00

Related Documents ▾

[Purchase Order: 240006340T](#)

[Voucher: C004080T](#)

What's next? ▾

Workflow ...

Submitted

11/24/2025 10:25 AM

● Submitted - 11/24/2025 10:25 AM - Mel(MaryEllen) Castillo

On behalf of: Minna Chang

4-CHANGE REQUEST ON A PO FOR CHARTFIELD AND ITEMS

This section will focus on a Change Request for adjusting the following:

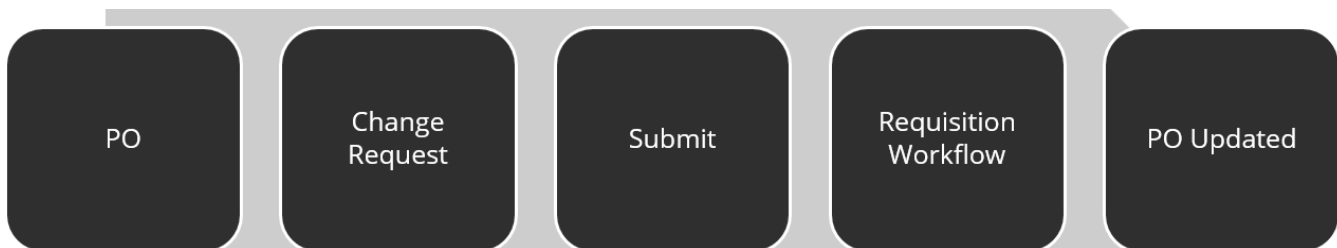
1. Chartfield (all chartfields except for Business Unit)
2. Dollar, Quantity, Product Description of Items on a PO

A Change Request (formally known as a Purchase Order Amendment – POA) allows the Prepare For person, typically the Requester (who is also the PO Owner) to amend an order that has already completed workflow and is now a PO.

A change to the PO can be made only when the PO is **NOT** in a closed status.

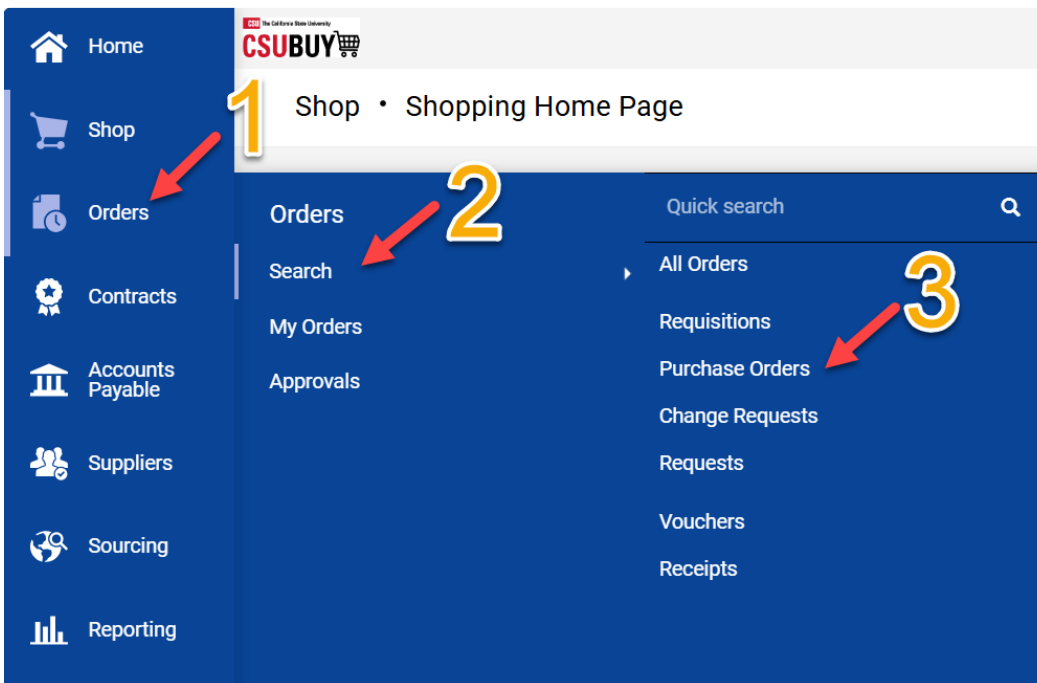
A Change Request CANNOT be made for PunchOut Supplier Purchase Orders.

The Change Request updates a Purchase Order by resubmitting it through the requisition approval workflow for review and approval before the revised PO is finalized. Important Note: a Change Request cannot be made on a PO that has a voucher, payment, or receipt; therefore, it is important to check the status of the PO first.



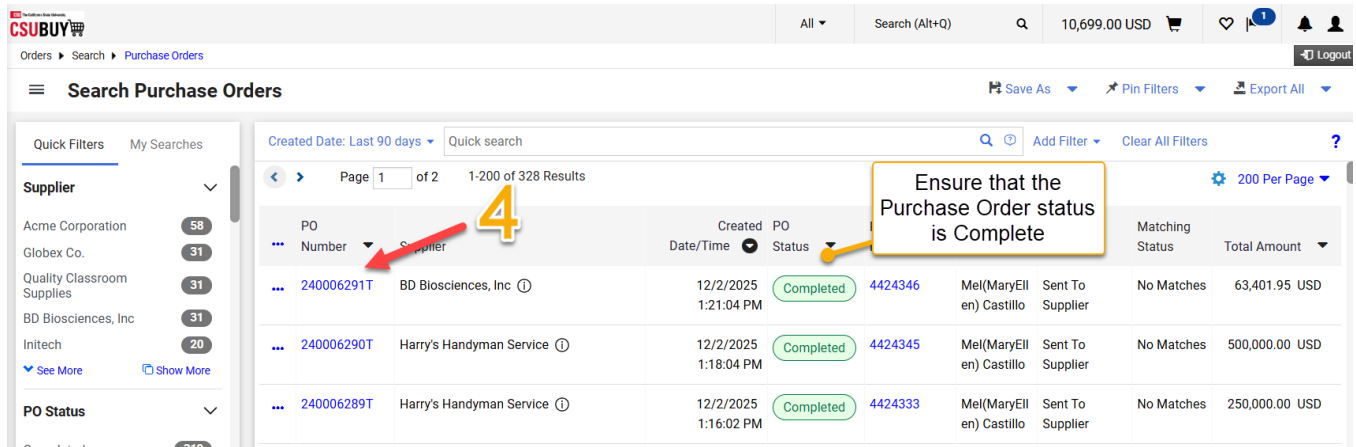
A Change ORDER is only done by Buyers and is different from a Change Request because it does not go through the requisition approval workflow process for the change.

From the flyout, select Orders>Search>Purchase Orders

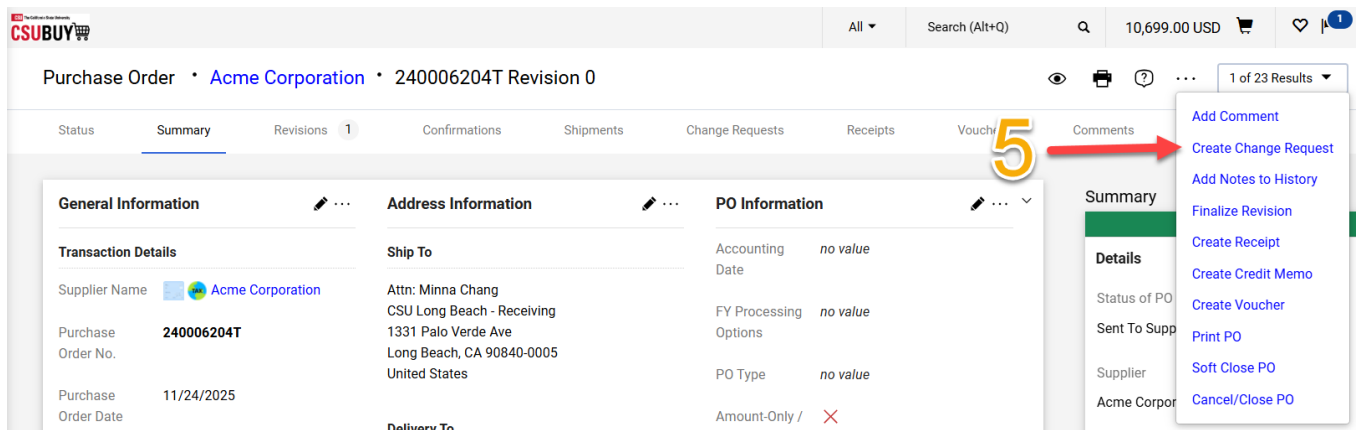


Search for the Purchase Order and select the PO that needs a Change Request.

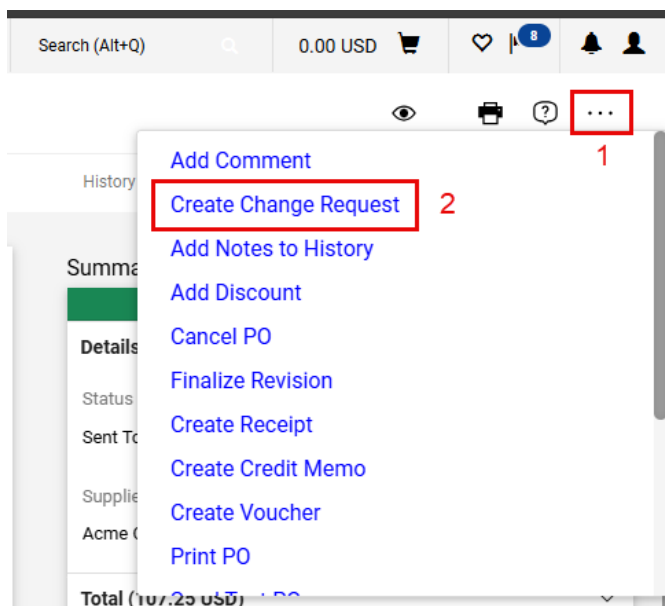
Verify that the Purchase Order's status is Completed. If it is pending, request the Buyer to return the requisition.



After finding the Purchase Order, click the three dots to the rights and select 'Create Change Request' from the list.



Here is a closer view of 5.



The below pop-up will appear for the change request. Select the users that you want to notify. If the recipient is not listed, click **Add recipient** to add them. Note: it is suggested (not required) that you select your approver(s) as a recipient so they know a change request will be coming for approval. It is not necessary to add the Buyer.

Scroll down to type in the reason for the change request and any necessary documents that need to be attached. Be very specific about what changes you are requesting to the Requisition/PO and attach supporting documents for the change.

Click **Create Change Request**

You will now be redirected to a draft requisition. Use the pencil icon on the right side of each section to make changes and save.

Change Requests • 4424603

Summary Taxes/SSH PO Preview External Communication Comments 2 Attachments History

30 Items

Acme Corporation • 30 Items • 750.00 USD

SUPPLIER DETAILS CA State University Long Beach

Contract no value

Quote number no value

Line Item Catalog No. Size/Packaging

Goods and Services Request

Contract: no value

1 Test BX 25.00 30 BX 750.00

ITEM DETAILS

Performance Start Date Commodity 170003 / General Supplies Tax Code LBC

Performance End Date Commodity Code Long Beach Sales Tax

Receiving Required no value Taxable ✓

Contains Discount ✗ Asset ✗

Prepayment no value Asset Profile ID no value

PO Clauses Add Work Order no value

Values have been overridden for this line

CHARTFIELD

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State University Long Beach	GFD01_LBCMP CSU Operating Fund	00738_LBCMP Financial Management	170003 General Supplies	660003_LBCMP Supplies and Services	no value	no value	no value	no value

Total (\$28.75 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 750.00

Sales Tax 78.75

Use Tax 0.00

828.75

Related Documents

Purchase Order: 240006204T

Requisition: 4419441

What's next for my order?

Next Step Wait for Validation 1

Approver Approver (DO NOT DELETE), Workflow

Workflow

Draft Active

Stacey Teodoro
On behalf of: Minna Chang

Start - Parallel Steps

Requisition Validation 1 Future

Wait for Validation 1

Note: if your original requisition was submitted during a different Accounting Period (month), and the G/L for that month is closed, you will need to remove the Accounting Date, or your Change Request will be returned by the system. To remove the Accounting Date, click the pencil under PO Information so that you may edit the Accounting Date.

General Information Address Information PO Information

Transaction Details

Cart Name: Repeat of PR-99 - CS

Business Unit: Cal State San Marcos PDP (2300MP)

Ship To: Attn: Michelle Tanner
c/o Receiving
441 La Morice Road
San Marcos, CA 92876
United States

Accounting Date: no value

PO Type: no value

Amount-Only / Basket PO: ✗

Chartfield Changes

To make changes to the chartfield, scroll down to the chartfield lines and click the pencil to edit.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
IT Software Request						
Contract:		no value				
1	testing smt tax	EA	100.00	100	10,000.00	...
ITEM DETAILS						
Service Start Date	Commodity Code	115004 / IT Software		Tax Code	SMS San Marcos Sales Tax	
Service End Date	Override Receiving Required	✗		Taxable	✓	
more info...	Prepayment	no value		Asset	✗	
	PO Clauses	Add		Asset Profile ID	no value	
				Work Order	no value	
CHARTFIELD						
						Values have been overridden for this line
Business Unit	Fund	DeptID	Account	Account Override	Program	Class
SMCMP - Cal State San Marcos	48500_SMCMP TF Campus Operating Fund	1047_SMCMP FAS Procurement & Contracts	616802_SMCMP Info Tech Software > \$5000	no value	no value	no value

You can change the Fund, Dept ID, add an Account Code Override, or split the fund (+). Once you have made the changes, click on the checkmark to validate then click Save.

Override Line 1: Chartfield

Business Unit *	Fund *	DeptID *	Account *	Account Override *	Program *	Class *	Project *
SMCMP - Cal State San Marcos	48500_SMCMP	1047_SMCMP	616802_SMCMP	Search	Search	Search	Search

+ ✓

Save Close

* Required fields

Item Changes

To make changes to the dollar amount, quantity, product description, and other line changes, click on the form name.

CSUBUY

Change Requests • 4202662

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments History

Ad-Hoc Approver [Select](#)

100 Items

Bradford Telecommunications · 100 Items · 10,000.00 USD

SUPPLIER DETAILS Cal State San Marcos P2P (SMXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract no value Supplier Account No. no value

Quote number no value PO Clauses

Item	Catalog No.	Size/Packaging
IT Software Request		
Contract: no value		
1	testing smt tax	EA
ITEM DETAILS		
Service Start Date	Commodity Code	115004 / IT Software
Service End Date	Override Receiving Required	✗

Click on **Cost Details** to get to the cost information.

The screenshot shows the CSUBUY interface for an IT Software Request. On the left is a vertical navigation menu with icons for Home, Shopping, View Forms, Back to Change Request, and various request steps. The main content area is titled "IT Software Request" and shows form details: Form Number 1061003, Purpose Procurement Request, and Status On Document. Below this is a list of steps: Suppliers, Form Fields, General IT Software Information, Information Security, Additional Supplier Information, Cost Details (highlighted with a red box), and Review and Submit. To the right, an "Instructions" section provides guidance on when to use the form, listing criteria like "is for IT Hardware" and "is for general goods". A red note states: "Note: A supplier must..."

Make edits to the Cost Details as applicable then click **Save on Change Request**.

This screenshot shows the "IT Software or Maintenance Details" form. At the top, a note asks the user to review campus procurement policy. The form is divided into sections: "Software Details" and "Taxable". The "Software Details" section contains fields for Unit Price (100.00 USD), Quantity (100), Total (10,000.00 USD), Unit of Measure (EA - Each), and Product Description (testing smt tax). The "Taxable" section has a "Yes" checkbox, a "Catalog No." field, and a "Commodity Code" (115004 - IT Software). At the bottom right, there are navigation buttons: "Previous", "Save on Change Request" (highlighted with a red box), and "Next".

Click **Back Arrow** to get out of the form and to your shopping cart.

The screenshot shows the CSUBUY breadcrumb navigation at the top of the page. It includes the CSUBUY logo and the text "Procurement Request • IT Hardware Request". A red box highlights a left-pointing arrow icon. Below the breadcrumb, there are three tabs: "Suppliers", "Form Fields", and "Review And Submit".

Change Request Process Completion

All Change Requests require an Internal Note or an Attachments.

- To add Internal Notes, click the pencil, add your notes, then click Save.
- To add an Attachment, click Add, add your attachments, then click Save. Note: If you have multiple files to attach you will need to repeat this step for each attachment.

CSUBUY

Change Requests • 4202662

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments Histor

Bill To

Accounts Payable, CSU San Marcos
accountspayable@csusm.edu
San Marcos, CA 92096
United States

Chartfield

Values vary by line.

Other Participant Information Internal Notes and Attachments

Prepared by Michelle Tanner Internal Note no value

Prepared for Michelle Tanner Internal Attachments **Add**

Buyer 68000117876 Michelle Tanner

Ad-Hoc Approver [Select](#)

Once all changes are made, click **Submit Request**. Once the Change Request is submitted, it will be routed through the original workflow again.

Assign Draft **Submit Request**

Summary →

Draft

Total (10,667.25 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	9,900.00
Sales Tax	767.25
Use Tax	0.00
Shipping	0.00
Handling	0.00
	10,667.25

You will receive a notification that the Change Request has been submitted, and the Purchase Order owner will be notified of the changes.

✔ Change Request 4424603 Submitted

Summary	Options
Change Request number: 4424603	Print
Change Request status: Pending	Recent orders
Cart name: Test for Verify Receipt for Shopper - CR	Return to your home page
Change Request date: 12/3/2025	
Change Request total: 828.75 USD	
Number of line items: 1	

5-ADDING AND REMOVING A LINE ON A PURCHASE ORDER (PO)

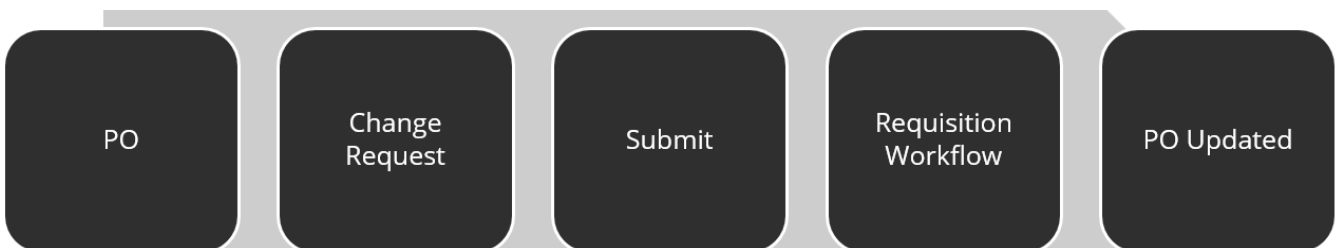
This section will focus on a Change Request to add or delete a line on a PO. This means you are adding or removing items from the PO. The item to be added must have the **same Supplier** and the **same Form** as the other items on the PO. Please consider putting in another requisition instead as it may be easier than following this process.

A Change Request (formally known as a Purchase Order Amendment – POA) allows the Prepare For person, typically the Requester (who is also the PO Owner) to make changes to an order that has already completed workflow and is now a PO.

A change to the PO can be made only when the PO is NOT in closed status.

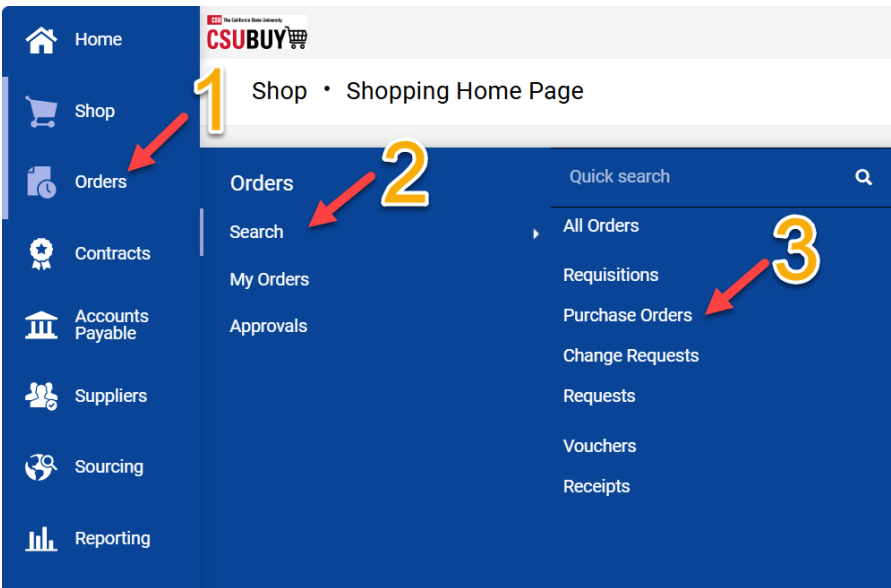
A Change Request CANNOT be made for PunchOut Supplier Purchase Orders.

The Change Request updates a Purchase Order by resubmitting the order through the requisition approval workflow for review and approval before the revised PO is finalized. It brings the order back to a draft requisition. Important Note, that a Change Request cannot be made on a PO that has a voucher, payment, or receipt; therefore, it is important to check the status of the PO first.



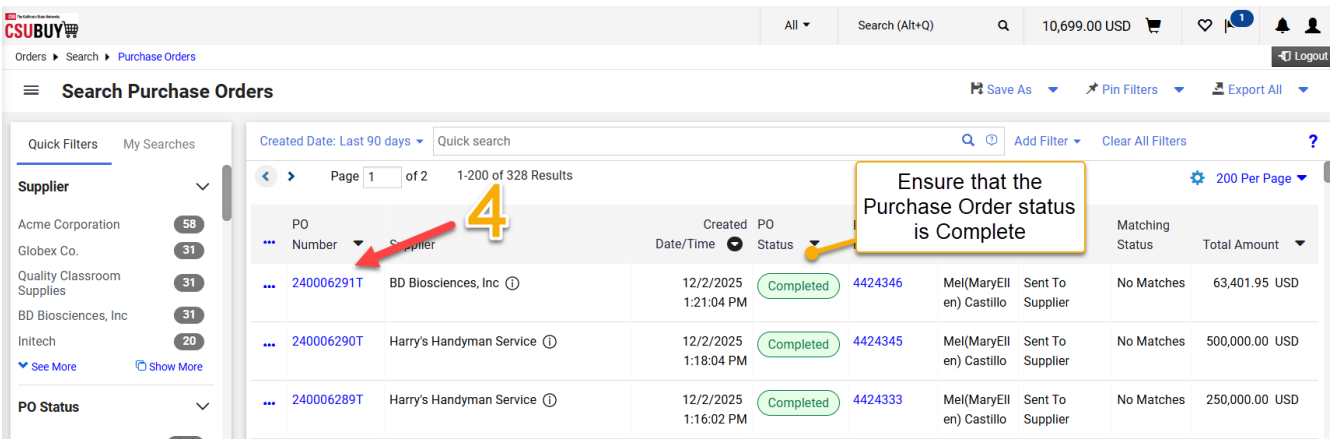
A Change ORDER is only done by Buyers and is different from a Change Request because it does not go through the requisition approval workflow process for the change.

To make a Change Request, first locate the Purchase Order.
From the flyout, select Orders>Search>Purchase Orders

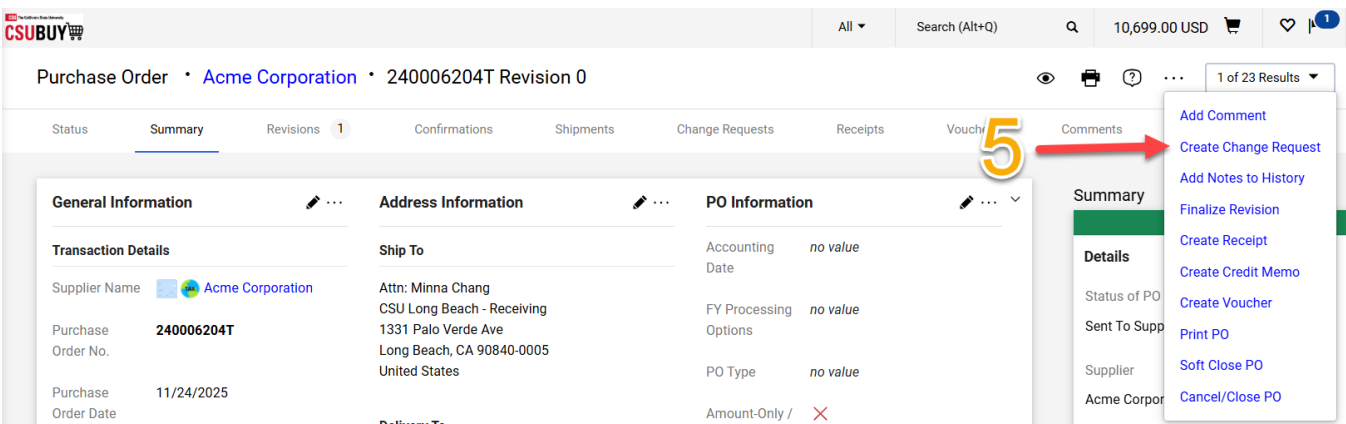


Search for the Purchase Order and select the PO that needs a Change Request.

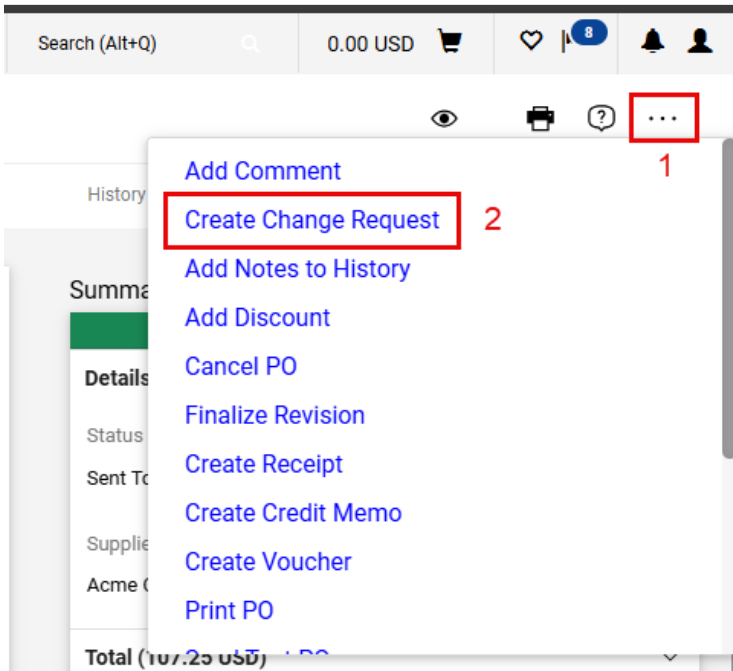
Verify that the Purchase Order's status is Completed. If the Purchase Order is pending, you may request the Buyer return the requisition to you.



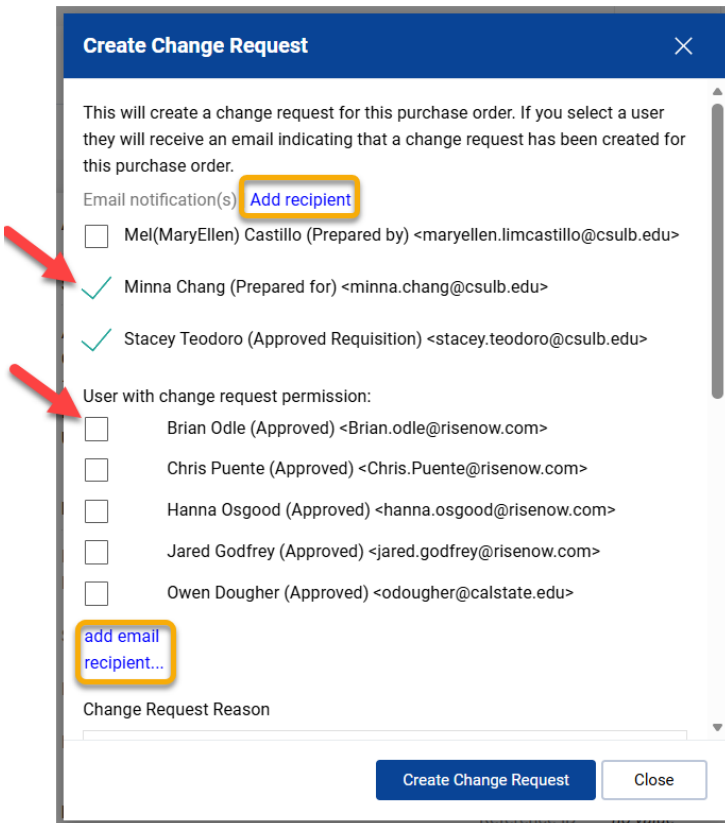
After finding the Purchase Order, click the three dots to the rights and select **Create Change Request** from the list.



Here is a closer view of 5.



The below pop-up will appear for the change request. Select the users that you want to notify. If the recipient is not listed, click **Add recipient** to add them. Note: it is suggested (not required) that you select your approver(s) as a recipient so they know a change request will be coming for approval. It is not necessary to add the Buyer.



Scroll down to type in the reason for the change request and any necessary documents that need to be attached. Be very specific about what changes you are making to the Requisition/PO and attach supporting documents for the change.

Click **Create Change Request**

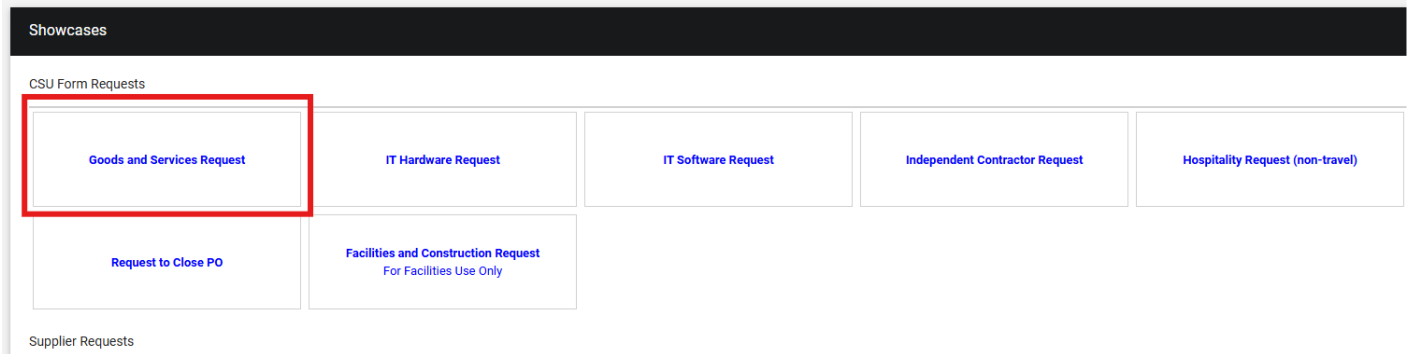
The screenshot shows a 'Create Change Request' dialog box. At the top, there are links for 'add email' and 'recipient...'. Below is a text area for 'Change Request Reason' with a callout box that says 'Add reason for change request here'. Underneath the text area, it says '1000 characters remaining' and has 'expand | clear' links. A note states: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.' Below this is the section 'Attach file to this change request (optional):'. It has two radio buttons for 'Attachment Type': 'File' (selected) and 'Link/URL'. Below that is a 'File Name' input field with a callout box that says 'Search and attach files here with change request'. At the bottom, there are two buttons: 'Create Change Request' (highlighted with a red arrow) and 'Close'.

Make sure you note the Change Request number since you will need it in a later step. Then click on the Home icon in the flyout to return to the Shopping Home Page.

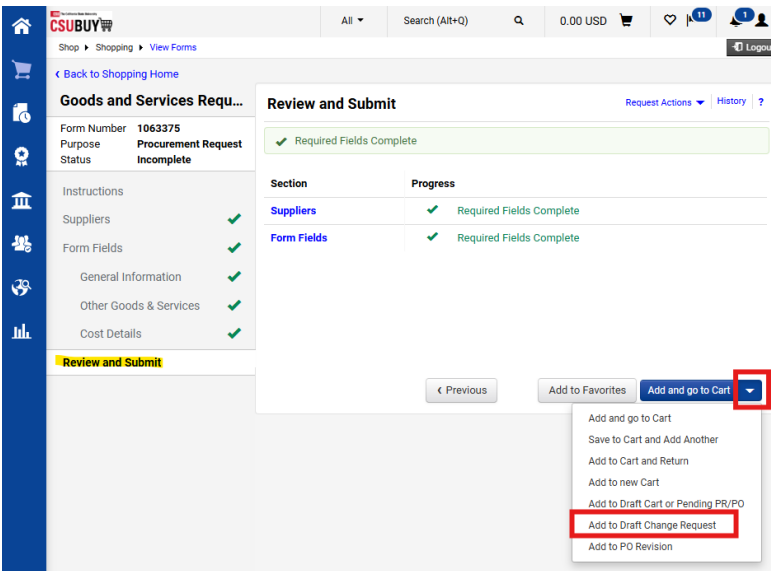
The screenshot shows the CSUBUY system interface. On the left is a blue navigation flyout with icons for Home, Shopping Cart, Home, Settings, and Help. The Home icon is highlighted with a red box. The main content area shows 'Change Requests' with the number '4206820' highlighted in a red box. Below this are tabs for 'Summary', 'Taxes/S&H', 'PO Preview', and 'External Communication'. The 'Summary' tab is active, showing a message: 'Changes will not be sent to the Supplier.' Below that is the 'Change Request Reason' section with a table:

Reason
Change requested to add a line for a service charge fee

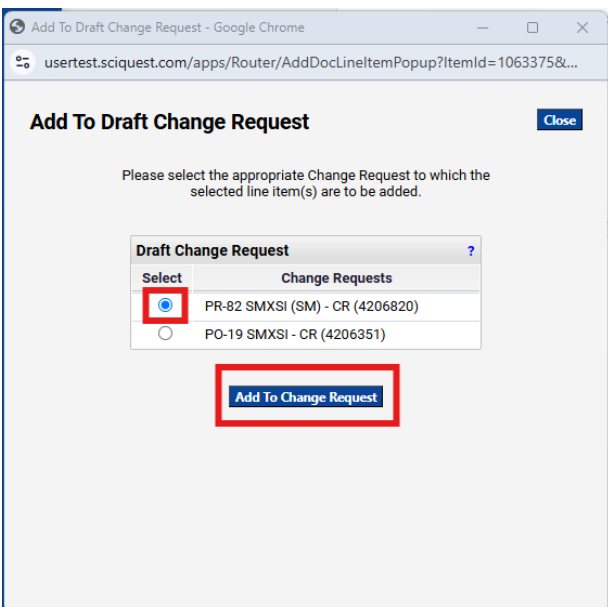
Find the Form for the item you are adding. Again, the Form must be the same Form as the other items on the PO. If it is not, you will receive an error message.



Complete the form fields. Once on the **Review and Submit** page of the Form, click on the drop down and select **Add to go to Cart** and then select **Add to Draft Change Request**.



A list of your change requests in Draft status with the same supplier as the item to be added is displayed. Select the correct change request and click Add to Change Request.



Now, return to the Purchase Order you initiated the Change Request for and open it.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner
240002753T	Quality Classroom Supplies	11/13/2024 1:24:13 PM	Completed	4161225	Michelle Tanner
240002728T	Fisher Scientific	11/12/2024 2:36:09 PM	Completed	4161087	Michelle Tanner
240002691T	Quality Classroom Supplies	11/7/2024 11:19:56 AM	Completed	4156550	Michelle Tanner
240002617T	Bradford Telecommunications	10/22/2024 6:52:00 PM	Completed	4143364	Michelle Tanner
240002616T	Bradford Telecommunications	10/22/2024 6:34:31 PM	Completed	4143380	Michelle Tanner
240002418T	Quality Classroom Supplies	9/26/2024 2:48:03 PM	Completed	4124873	Michelle Tanner
240002417T	Initech	9/26/2024 2:47:02 PM	Completed	4124869	Michelle Tanner
240002416T	Victor's Vehicle & Repair	9/26/2024 2:44:33 PM	Completed	4124804	Michelle Tanner
240002415T	Victor's Vehicle & Repair	9/26/2024 2:42:59 PM	Completed	4124806	Michelle Tanner
240002414T	Edwin's Equipment New & Refurbished	9/26/2024 2:41:59 PM	Completed	4124865	Michelle Tanner
240002413T	Quality Classroom Supplies	9/26/2024 2:40:59 PM	Completed	4124788	Michelle Tanner

Go to the Change Request tab and open the Change Request.

Status	Number	Owner	Created
Draft	4206820	Michelle Tanner	1/22/2025

Review the newly added line and details to confirm or edit, as needed.

Note: if your original requisition was submitted during a different Accounting Period (month), and the G/L for that month is closed, you will need to update the Accounting Date, or your Change Request will be returned by the system. To update the Accounting Date, click the pencil under PO Information

All Change Requests require an Internal Note or Attachment.

To add an Attachment, click Add, add your attachments, then click Save. If you have multiple files to attach you will need to repeat this step for each attachment.

Change Requests • 4202662

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments Histor

Bill To

Accounts Payable, CSU San Marcos
 accounts payable@csusm.edu
 San Marcos, CA 92096
 United States

Chartfield

● Values vary by line.

Other Participant Information Internal Notes and Attachments

Prepared by Michelle Tanner Internal Note no value

Prepared for Michelle Tanner Internal Attachments [Add](#)

Buyer 68000117876 Michelle Tanner

Ad-Hoc Approver [Select](#)

Click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again. You may search for the Change Request Number to see where it is in workflow.

Assign Draft **Submit Request**

Summary →

Draft

Total (10,667.25 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	9,900.00
Sales Tax	767.25
Use Tax	0.00
Shipping	0.00
Handling	0.00
	10,667.25

Removing a Line from a Purchase Order

Once you selected Create Change Request, you may navigate to the line or item you would like to remove.

32 Items

Acme Corporation · 32 Items · 15,400.00 USD

CA State University Long Beach (LBXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract no value Supplier Account no value

Quote number no value PO Clauses no clause

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	IT Hardware Request					

Actions for 1 selected item

Cancel Selected Items

Total (17,017.0)

Shipping, Handl calculated and
The values sho purposes, budg approvals.

Subtotal
Sales Tax
Use Tax

Use Tax

3

Remove Selected Items

Cancel Selected Items

Purchase Order: 241

"Remove" is deleting the line from the change request and can only be done on a line that was added on a change request. You cannot remove a line on the original PO. You can cancel the line.

"Cancel" is leaving the line on the PO, but marking it as cancelled. Select this if you no longer wish to purchase the item from the original PO.

Withdraw Change Request

After submitting the Change Request, you may navigate back to the Change Request and select Withdraw Change Request. If this option is not available, it means the Change Request was approved. See the History tab to confirm.

Change Requests · 4424603

Withdraw Change Request

Summary Taxes/S&H PO Preview External Communication Comments 2 Attachments History

Withdraw Change Request

6-WITHDRAW A REQUISITION

A Requisition in workflow could be cancelled and prevented from progressing. However, once it becomes a PO it can no longer be withdrawn.

Once withdrawn, you cannot resubmit that order, but you may copy the items to a new cart and resubmit the order.

Go to the Requisition and select **Withdraw Entire Requisition**.

The screenshot shows a requisition page for ID 3846591. The page has tabs for Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The main content area is divided into sections: General Information, Shipping Information, Billing Information, Transaction Details, Ship To, and PO Details. A modal dialog box titled "Withdraw Entire Requisition" is open, containing a warning message: "Once a requisition is withdrawn, it cannot be reinstated. Click OK to withdraw, or CANCEL to leave the requisition unchanged." Below the message is a text input field labeled "Reason" and buttons for "OK" and "Cancel".

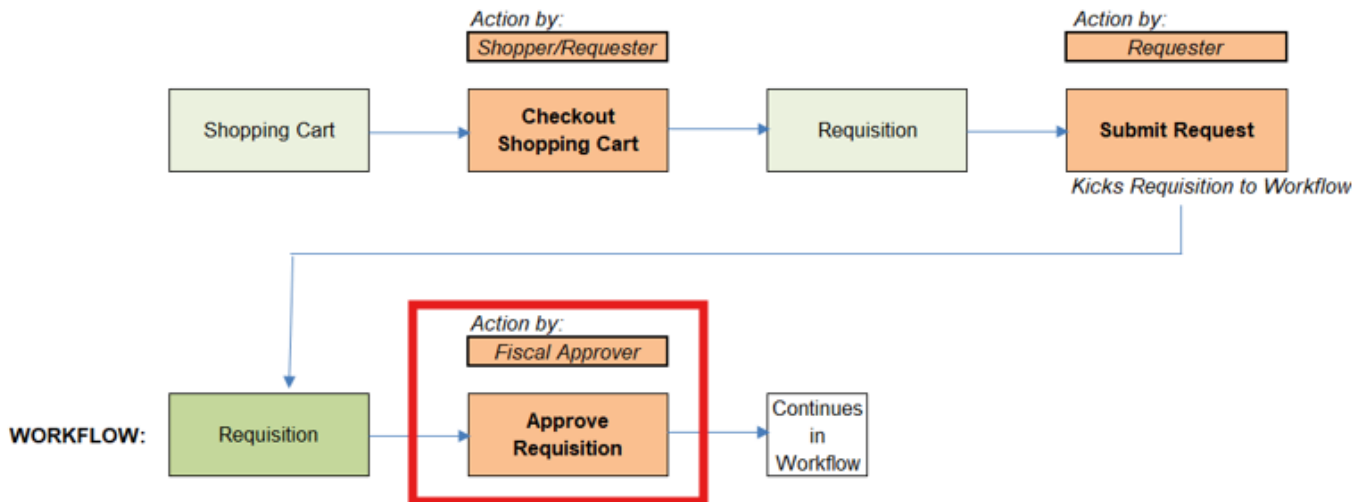
Note: At any point in the process the submitter can withdraw a requisition

CSU The California State University

CHAPTER 4: DOA APPROVER

1-APPROVAL WORKFLOW FOR REQUISITION

The DOA Approver is notified of a Requisition to be reviewed. When the Requisition is approved, it will continue to the next step in the Workflow.



2-LOCATE REQUISITIONS AND ASSIGN FOR YOUR APPROVAL

As a DOA Approver, you are designated to approve purchases in CSUBUY based on your DOA level for specific Fund(s) and Department ID(s). The requisition dollar amount determines the DOA level the approver is required to be in.

There are several ways to be notified of and locate a requisition you may approve. Keep in mind that a requisition may have multiple DOA Approvers; however, only one DOA Approver is required to approve the requisition. Please note that once you locate a requisition to be approved, you must first assign the requisition to yourself before you are able to approve the requisition. An internal process may be developed to manage who will approve which requisitions.

Additionally, departments may have their own internal processes external to CSUBUY for approvals of certain transactions within CSUBUY.

1. Email

If you set up your notifications to receive an email and if a requisition needs your approval, you will receive an email from CSUBUY. Scroll down and click on View Requisition Approval, which will take you to a list of requisitions you may approve.

Requisition#: 211644640 awaiting your approval in Requisition Approval Workflow



CSUBUY <noreply@jaggaer.com>
To Minna Chang



Thu 1/29/2026 1:25 PM

- This sender noreply@jaggaer.com is from outside your organization.
- If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email was sent from an external source.

DeptID: 00738_LBCMP (Financial Management): (0.00 - 5,000.00) USD Approval Request for Requisition# 211644640

Dear Minna Chang,

The requisition listed below has been submitted for your approval.

Summary

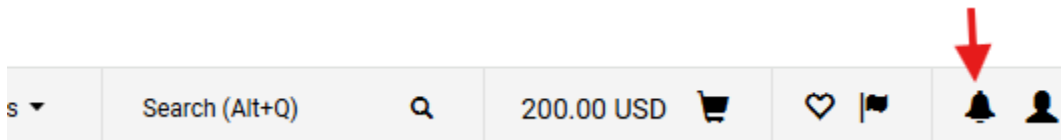
Attn: Mel(MaryEllen) Castillo
CSU Long Beach - Receiving
1331 Palo Verde Ave
Long Beach, CA 90840-0005
United States

[View Requisition Approvals](#)



2. Notifications

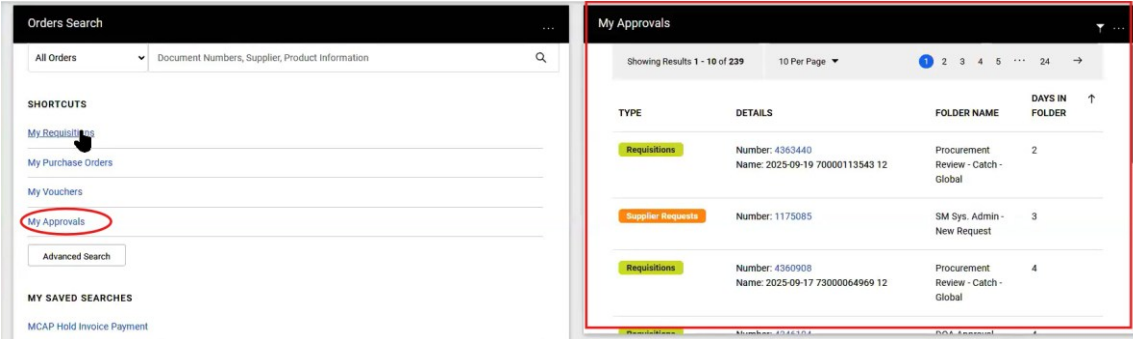
You will be notified there is a requisition to be approved by email and/or via the CSUBUY notification bell alert, depending upon how your preferences were set up.



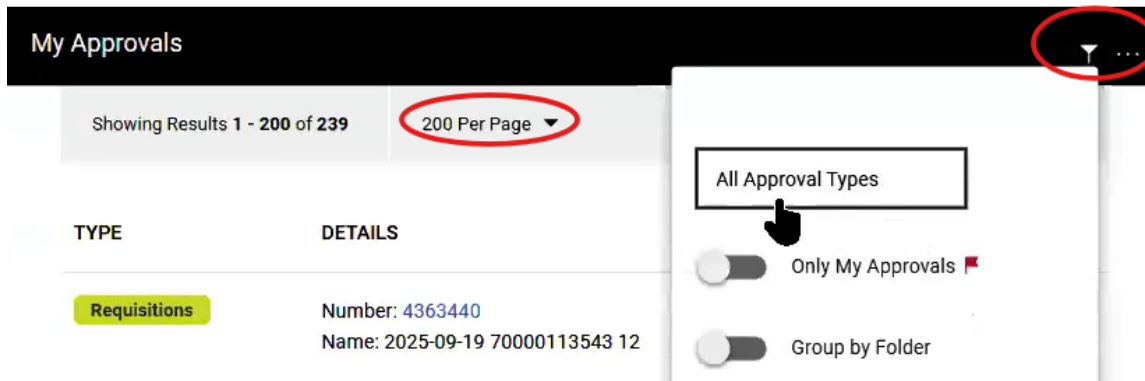
NOTE: The end user will continue to receive daily email notifications regarding the pending approval, until the approval has been entered into CSUBUY.

3. Home Page: My Approvals

Requisitions to be approved appear on the Home Page in two areas as highlighted below:



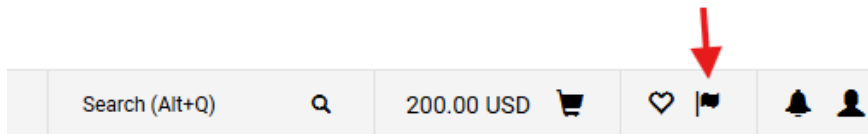
In My Approvals, adjust the number of documents to view per page and use the filter. (See the Section on **Filtering My Approvals on Home Page** for more details.)



4. Home Page: Action Item Flag

Click on the Flag on the Home Page to locate requisitions to approve.

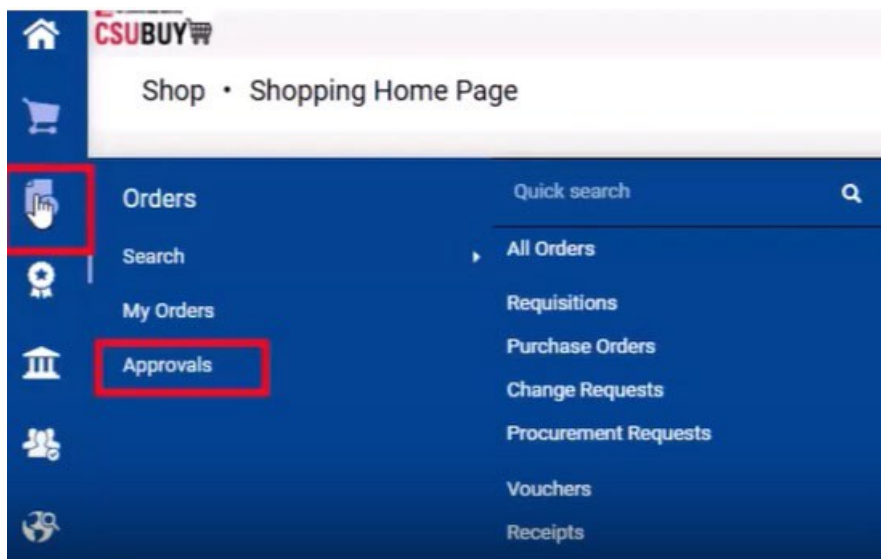
Once you click there, you will see Action Items split between My Assigned Approvals, which are requisition assigned to you and Unassigned Approvals, which are requisitions that have not yet been assigned to an Approver.



Action Items	
My Assigned Approvals	
Requisitions To Approve	6
Vouchers	1
Unassigned Approvals	
Requisitions	63
Purchase Orders	3
Supplier Registrations	23
Change Request	27
Procurement Request Approvals	9
Supplier Request Approvals	104

5. Search

You may search for Requisition to be approved by selecting from the Home Page flyout:
Orders>Approvals>Requisition to Approve



Assigning Yourself a Requisition:

When identifying a requisition in the Approval queue, you may:

1. Select the Requisition by clicking on the box to the left of the Requisition.
2. Click on the "Select an Action" drop down.
3. Select Assign

The screenshot shows the CSUBUY Approvals interface. On the left, there are filters for Date Range (All Dates), Assigned Approver (Barbara Buyer), and various categories like SUPPLIER, SUPPLIER CLASS, BUSINESS UNIT, and CURRENT WORKFLOW STEP. The main table displays requisition details for 'MY PR APPROVALS' and 'SAN MARCOS - COMMODITY - SUPPLIES'. A context menu is open over the table, listing actions: Assign, Approve/Complete, Forward..., Return to Shared Folder, Place PR On Hold, Add Notes to History, and Select an action. Red callouts 1, 2, and 3 point to the requisition row, the context menu, and the 'Assign' option respectively.

This is a close-up of the context menu from the previous screenshot. Callout 3 points to the 'Assign' option, and callout 2 points to the 'Select an action' dropdown at the bottom of the menu.

You may also open the requisition by clicking on the blue hyperlink.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	ACT
211476131	4imprint Inc	Not Assigned	1/26/2026 4:21 PM	Mel(MaryEllen) Castillo	2,500.00 USD	
Requisition Name		2026-01-26 40000326311 01		Folders	0 Days in folder [DeptID: 00738_LBCMP (Financial Management): (0.00 - 5,000.00) USD]	

Then select Assign & Further Action

The screenshot shows the CSUBUY Requisition 211476131 page. The 'Assign & Further Actions' menu is open, showing the 'Assign & Further Actions' option. The page displays various tabs like Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The main content area is divided into sections: General Information (Status: Pending), Address Information (Ship To: Attn: Mel(MaryEllen) Castillo), PO Information (Accounting: no value), and a Summary table showing a Total of 2,500.00 USD.

Requisition Approval Queue View of Assigned and Unassigned

The screenshot shows a table of requisitions with the following columns: REQUISITION NO., SUPPLIERS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, AMOUNT, and ACTIONS. Two requisitions are listed:

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	ACTIONS
211648370	*Supplier Not Known	Not Assigned	1/29/2026 2:07 PM	Mel(MaryEllen) Castillo	1,657.50 USD	[Edit] [Info]
211644640	AAA Flag & Banner Mfg Co Inc	Minna Chang	1/29/2026 1:24 PM	Mel(MaryEllen) Castillo	2,210.00 USD	[Edit] [Info]

3-REVIEWING A REQUISITION FOR APPROVAL

The DOA Approver cannot make any changes to the Requisition EXCEPT, change the Chartfield (excluding Business Unit), add Comments & Attachments, and add a PO Reference ID. Note: When you see a pencil icon, you may make an edit.

These are the key elements to review in a requisition. Click on each section to view details.

The screenshot shows the CSUBUY interface for requisition 4360900. A navigation bar at the top includes Home, Shop, and Orders. Below the requisition number, there are five tabs: Summary, Taxes/S&H, Comments, Attachments, and History. The Summary tab is currently selected and highlighted with a red box.

Summary

This is the most important section to review.

General Information

Make sure the Business Unit is correct. If it is incorrect, the requisition must be returned to the requisitioner. The approver cannot change this chartfield.

The screenshot shows the 'General Information' section of a requisition. It includes a 'Transaction Details' section with the following information:

- Status: ✓ Completed (1/22/2026 4:25 PM)
- Cart Name: 2026-01-22 40000271673 03
- Business Unit: LB - CA State University Long Beach P2P (LBXMP) - This row is highlighted with a red box.
- Submitted: 1/22/2026 4:24 PM
- Purchase Order: 2400072410 [view](#) | [print](#)

Address Information

- **Ship To** is typically the address for our Campus Receiving
- **Deliver To** is the building and room within Campus the product will be delivered to
- **Bill To** is the AP Dept address.

PO Information

PO Information

Accounting Date	<i>no value</i>
PO Type	<i>no value</i>
Amount-Only / Blanket PO	✗
Multi-Year PO	✗
Reference ID	<i>no value</i>
Do Not Distribute	✗

Accounting Date is usually blank unless there is a reason to specify this field such as a Change Request after the closing of the accounting period.

Amount-Only/Blanket PO – These are Purchase Order for goods or services with multiple payments not based on quantities being delivered.

- By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
- Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.
- Multi-Year PO - This should never be selected for our campus.

Other Participants

Provides information on the Requisition

Prepare by – Requester, who is the person who kicked off the Requisition to workflow

Prepare for – The person who created the Shopping Cart, usually the Shopper or Requester

Other Participant Information		...	Internal Notes and Attachments		...	External Notes and Attachments		...	▼
Prepared by	Michael Pruitt		Internal Note	<i>no value</i>		Note to all Suppliers	<i>no value</i>		
Prepared for	Michael Pruitt		Internal Attachments			Attachments for all suppliers			
Buyer	<i>no value</i>								

Internal Notes & Attachments can only be viewed by a person in the CSU who has access to CSUBUY.

External Notes & Attachments can be viewed by a person in the CSU who have access to CSUBUY and by Suppliers

Supplier Detail

Information on the supplier is provided.

Item Detail

If the Item listed provides an item description, this Requisition is from a PunchOut Catalog.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	Avery Hi-Liter Desk-Style Highlighters, Smear Safe Ink, Chisel Tip, 12 Fluorescent Yellow Highlighters (24000)	B0013L7ECW	EA	8.89	Qty: 1 EA	8.89	<input type="checkbox"/>

If the item listed is titled with **Request**, this Requisition is using a **Form**. You may click on the blue hyperlink and review that the Form has been completed appropriately.

Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓	Test Procurement Request: Goods and Services Request		BX	25.00	Qty: 30 BX	750.00	...

You may click on Click on each **Form** field (green check marks) to review details.

CSUBUY

Shop > Shopping > View Forms

[Back to Requisition](#)

Independent Contractor R...

Form Number: 1173861
Purpose: Procurement Request
Status: On Document

Suppliers

Supplier: [Acme Corporation](#)
CA State University Long Beach (LBXMP-1): 5151 State University Drive, Chico, California 95926 United States

- Suppliers ✓
- Form Fields ✓
 - Request Information ✓
 - Independent Contractor D... ✓
 - Questionnaire ✓
 - Cost Details ✓

All Requisitions include the following fields to be reviewed:

Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓	BoostCharge Braided USB-C Cable 6 6 , Black BECB14BT2MBK	BECB14BT2MBK	EA	9.52	Qty: 1 EA	9.52	...

ITEM DETAILS

Manufacturer Name	Belkin	Contract:	no value	Tax Code	LBC Long Beach Sales Tax
Manufacturer Part Number	CAB014BT2MBK	Commodity Code	170003 / General Supplies	Taxable	✓
Supplier Part Auxiliary ID	1959460	Receiving Required	no value	Asset	✗
more info...		Contains Discount	✗	Asset Profile ID	no value
		Prepayment	no value	Work Order	no value
		PO Clauses	no clause		

Commodity Code - Confirm commodity code is correct for the item being purchased. Please note this is an important field because the commodity code is what triggers a requirement to Create a Receipt when the goods arrive or a Compliance Review. Please see **Chapter 2 Shopper/Requester; Section 12 Commodity Code and Compliance Reviews**

for a list of Commodity Codes that require a Create a Receipt and Compliance Reviews and **Chapter 6, Section 1** for a complete list of Commodity Codes.

Receiving Required – This is automatically checked based on commodity code and will trigger the requirement to Create a Receipt when the product or service is received. The Shopper/Requester has been instructed not to adjust this field.

Asset - Mark “yes” if you know the item is an asset that will be capitalized, typically assets over \$5,000. This also triggers the requirement to Create a Receipt.

Chartfields - Review and ensure the Chartfields are correct. If the Account is incorrect, you can update the Account by entering an Account Override. Note: using account override will add an accounting review step into the workflow and will require another step in the approval process, delaying the purchase.

^ CHARTFIELD								Values have been overridden for th line	
Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project	
LBCMP CA State University Long Beach	GF001_LBCMP CSU Operating Fund	00738_LBCMP Financial Management	170003 General Supplies	660003_LBCMP Supplies and Services	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	

Taxes/S&H

Review of Sales and Use Tax for item.

Comments

Review for comments from individuals involved in the purchase of the item. You may also add comments.

Attachments

Review attachments associated with the Requisition. It could be a quote, email, or other information.

History

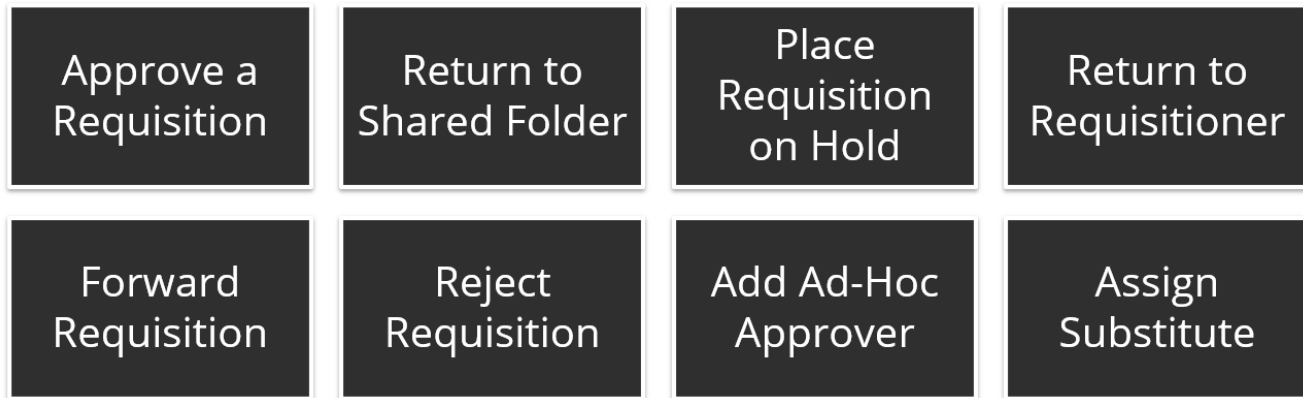
This provides a history of all those who took any action on the requisition. Since this is extensive, you may opt not to review in detail unless you are searching for specific information regarding the requisition.

Approver Checklist Tips

1. Verify account, fund, department, and project number, program, and class, if applicable.
2. Verify shipping address, contract number and price, or bid, as applicable.
3. Verify business purpose/appropriateness of allow-ability of purchase.
4. Verify the correct form was used, if applicable. Note that non-catalog suppliers are those suppliers who do not have a catalog in CSUBUY. Direct Payment Request forms are used to pay an invoice for purchases already made such as utilities.
5. Verify required documents are attached such as quotes/bids, invoices, if applicable.
6. Review order for accuracy and reasonableness – amount and price.

4-APPROVER ACTION

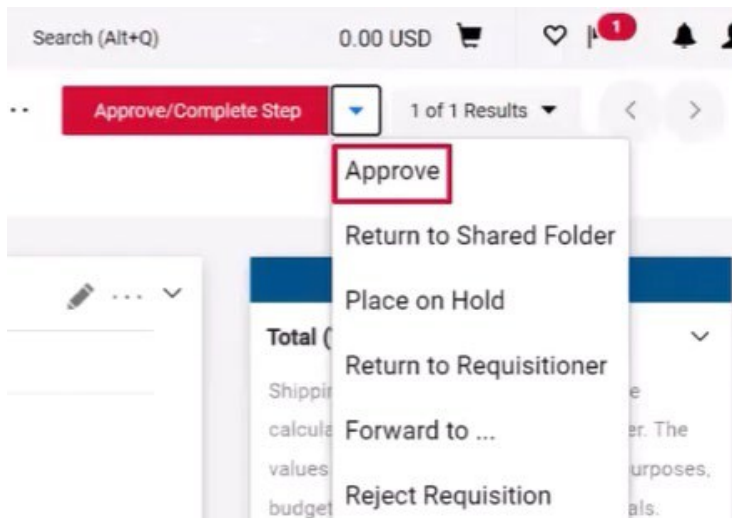
Once you locate the Requisition for your review, assign the Requisition to yourself and review the Requisition, there are multiple actions available for you to take as DOA Approver.



Open the Requisition and choose Approve if everything is correct and it can move to the next step or select **Approve & Further Actions**.



Approve & Further Actions provides additional options including Approve as shown:



Below are a list and description of approver's actions available:

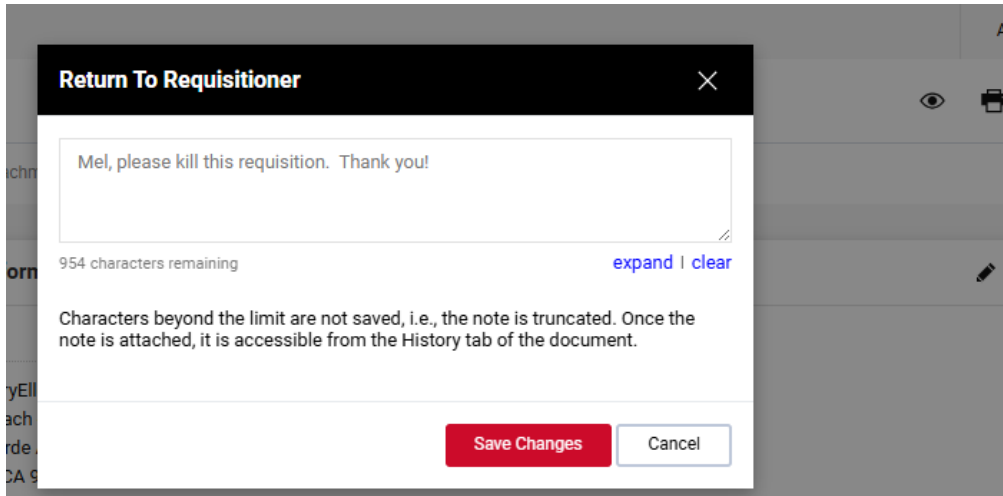
Approve: Everything looks good, completes the current step, and authorizes it to proceed to the next step in the process.

Return to Share Folder: You unassign yourself and return the requisition to the shared folder and allow access to other approvers. It is important to note that no notification occurs when this action is taken, however, status pending notifications will continue to be sent to all DOA approvers.

Place on Hold: Requisitions may be put on hold to resolve issues or gather more information before approval. This lets the Requester know that you have viewed the requisition and are working on it.

Return to Requisitioner: An approver may return the requisition back to the requester for edits and/or corrections.

- In the pop-up window, enter the reason for the return.
The note will be available via the Comments and recorded in the History tab with the Requester being notified. When you Save Changes, the Requisition will be sent back.



- The Requester can access the requisition from the Draft Carts screen (Shop>My Carts and Order>View Carts>Draft Carts).
- The Type column will indicate the requisition was returned. The cart can be opened, updated, and resubmitted to workflow.

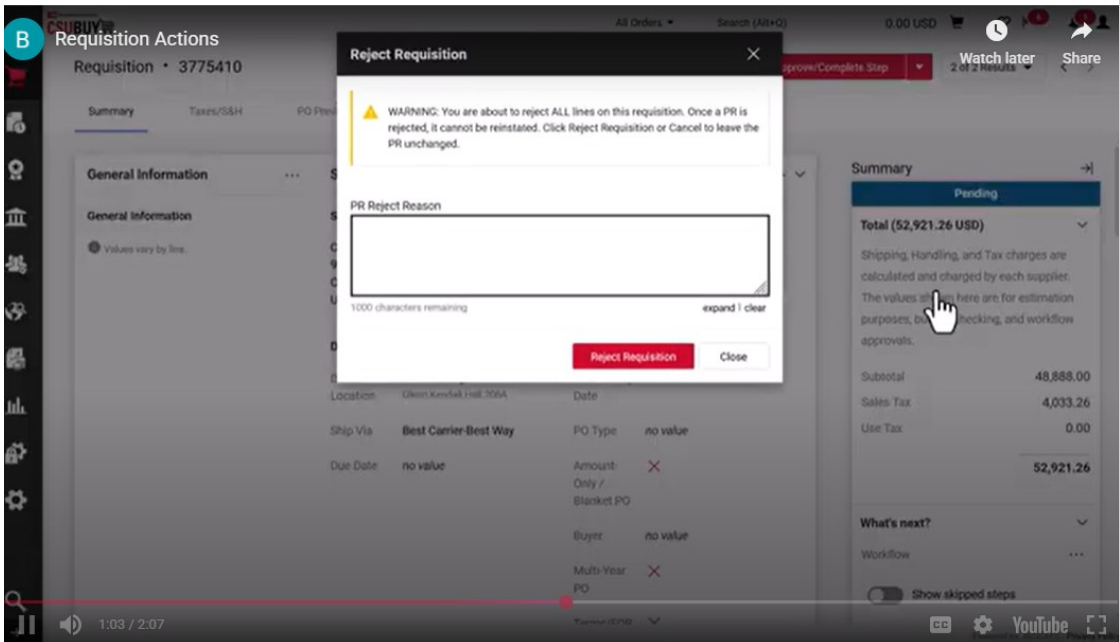
Forward to: You may forward the requisition to another approver to review and approve the requisition. Forward to an approver who has the same DOA level authority as yourself. Keep in mind that when forwarding, you are forwarding your authority.

Reject a Requisition: This action terminates the requisition from workflow. The action is not reversible and kills the requisition so no further action can be taken on it.

NOTE: If this was done in error, this will cause the shopper or requester to start the process all over again, as if the original request never existed. Use this action with caution.

- Enter the reason for the rejection in the pop-up window and select Reject Requisition to save the comment and reject. Requester will be notified it is rejected.

APPROVE, RETURN, OR REJECT A REQUISITION

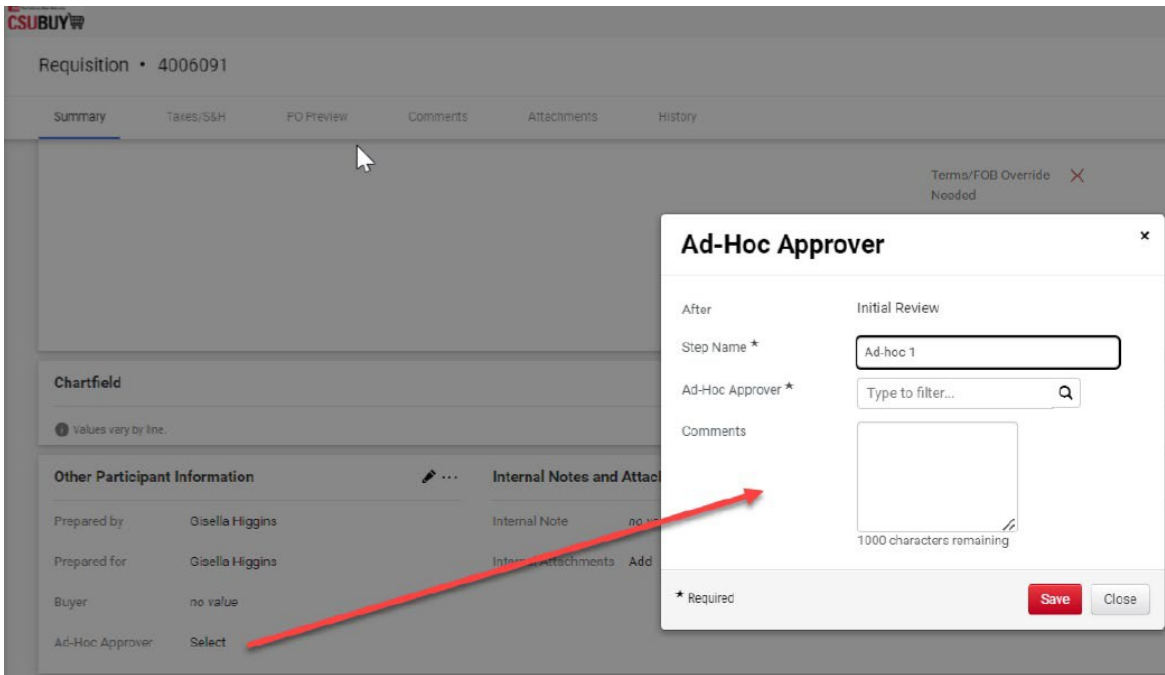


CREATE AND SEND COMMENTS

Other Additional Actions:

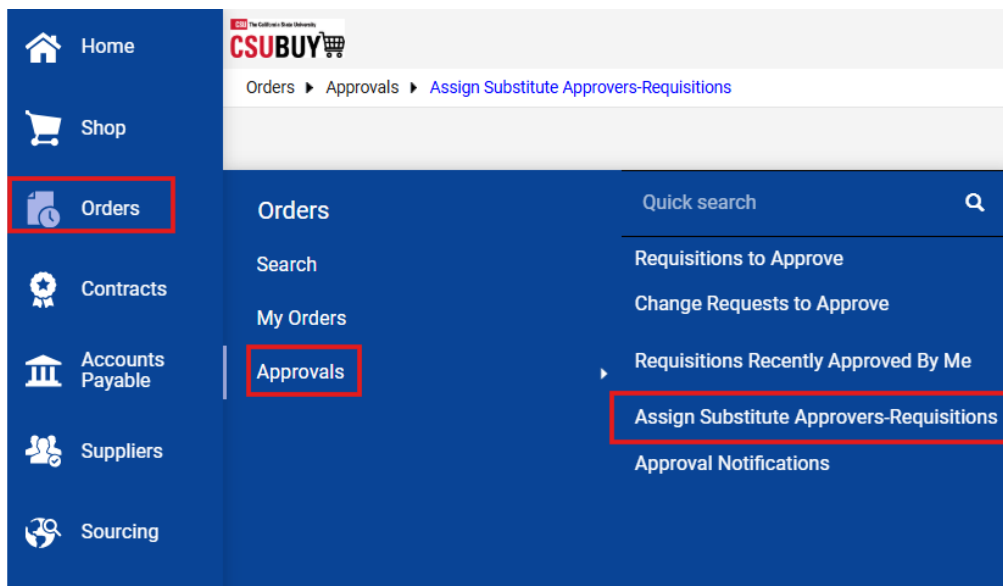
Ad-Hoc Approver: You may add another Approver, if needed. This action adds the approver in workflow after your approval step and does not replace you or return to your approval step. Please consider if adding a Comment would be sufficient for your needs since adding an Ad-Hoc Approver will slow down the workflow.

1. Go to the Requisition to be approved.
2. Scroll down to Other Participant Information
3. Go to Ad-Hoc Approver
4. Select the person.
5. Add a Comment, if needed.

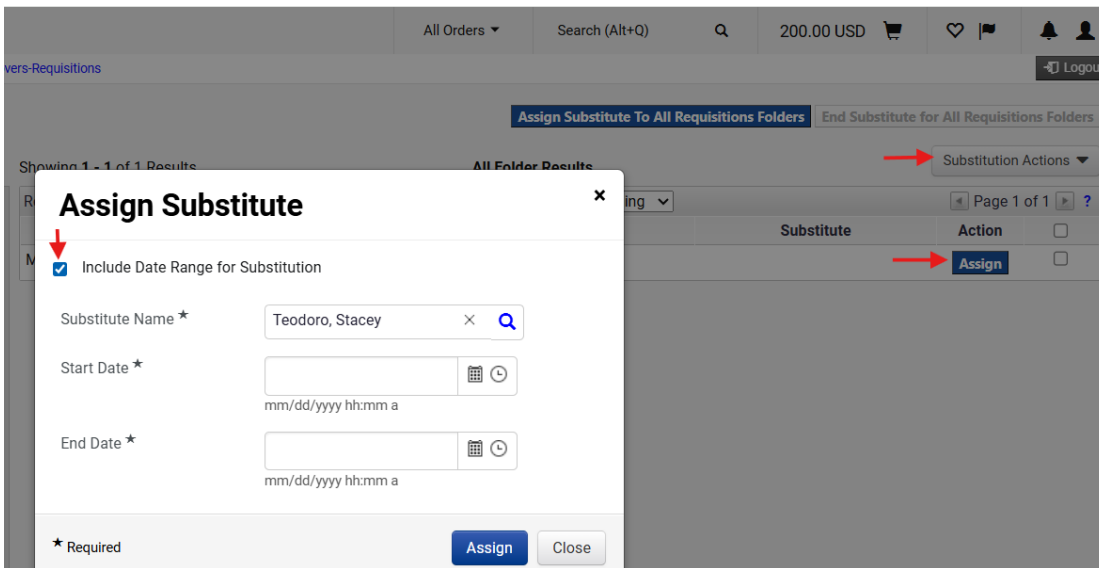


Assign Substitute Approver: This action replaces yourself as the Approver. You may use this action if you are going on vacation and need someone to cover for you. Please **make sure the Substitute Approver has the same or higher DOA level authority**. Although the substitute approver may approve the requisition, you are ultimately responsible for the requisition so ensure your substitute approver is trustworthy.

1. Go to Shop Home page and Orders fly out.
2. Select Approvals and then Assign Substitute Approvers-Requisitions



3. Click on either "Assign" or "Substitute Actions."
4. Select the name.
5. Enter a date range for the substitute by clicking on the check box and select the date range in which the substitute approver period begins and ends.

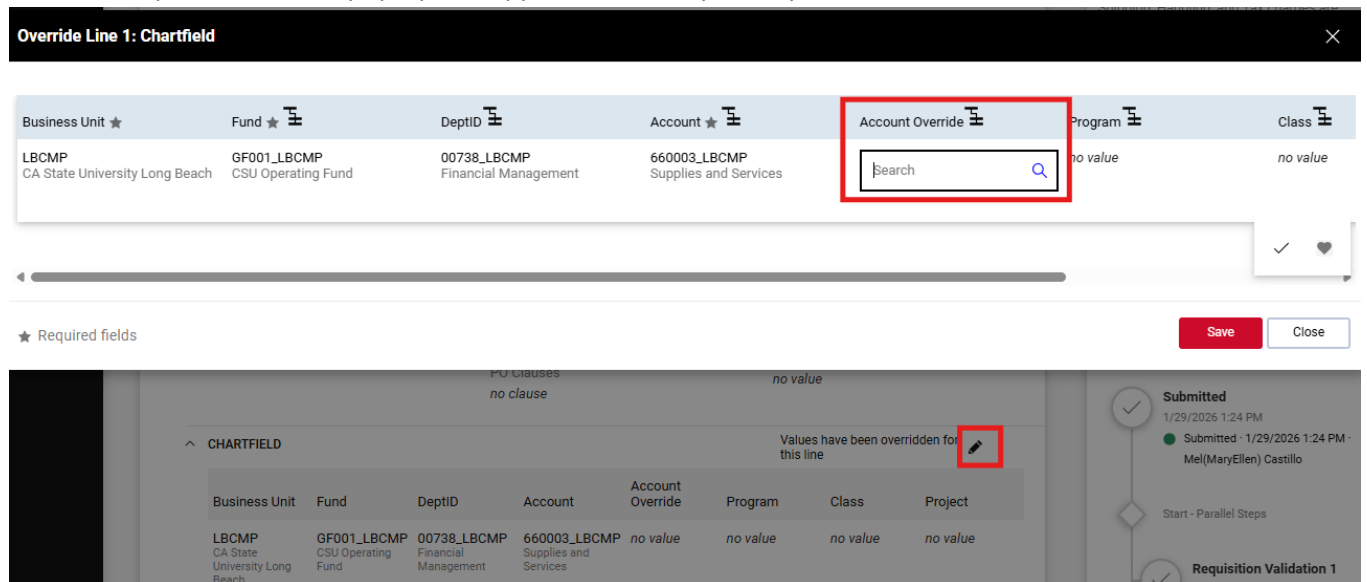


Making Changes to the Requisition

As the assigned Approver, the only changes you could make on the Requisition are the following:

1. Chartfield: Account Override

Click on the pencil icon. The pop-up box appears in which you may enter an Account Override.



2. PO Information: Reference ID

Click on the pencil icon. Edit or add the Reference ID. This field populates in the CFS PO as Reference ID. If left blank the CFS PO Reference ID will automatically populate the Requisition number + Order Owner (usually the Shopper or Requester). Therefore, it may be left blank here.

The image shows two overlapping screenshots. The foreground screenshot is a modal titled "Edit PO Information" with a close button (X) in the top right. It contains a form with the following fields:

- Accounting Date: no value
- PO Type: no value
- Amount-Only / Blanket PO: X
- Multi-Year PO: X
- Reference ID:
- Do Not Distribute: X

At the bottom of the modal are "Save" and "Close" buttons. The background screenshot shows the "PO Information" section of a requisition page. A red box highlights a pencil icon in the top right corner of the "PO Information" header, indicating where to click to edit the information.

3. Add Comment and Internal Note

- The comments become a permanent part of the document history.
- The recipient of the comment will receive an email that includes the comment as well as a link to the specific document, so they do not have to search for the document.
- You are able to select any user in CSUBUY to be the recipient.
- Attachments can also be included in the comments.

To add a Comment:

The image shows a screenshot of the CSUBUY requisition page for requisition 3761916. The page has a navigation bar with "Summary", "Taxes/S&H", "Comments", "Attachments", and "History". The "Comments" tab is selected. The main content area is divided into three columns: "General Information", "Shipping Information", and "Billing Information". A dropdown menu is open over the "Comments" tab, showing the following options:

- Copy to New Cart
- Add Comment (highlighted with a red box)
- Add Notes to History
- View My Orders (Last 90 Days)
- Continue Shopping
- View Carts
- View Cart return message(s)
- See configuration for this requisition

ADD COMMENT

1 Adding text for comments on a requisition

959 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

2

3

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

Terri L Kelly (Prepared by, Prepared for) <fbcfspqrq@calstate.edu>

Attach file (optional)

Attachment Type

File

Link/URL

File Name

File

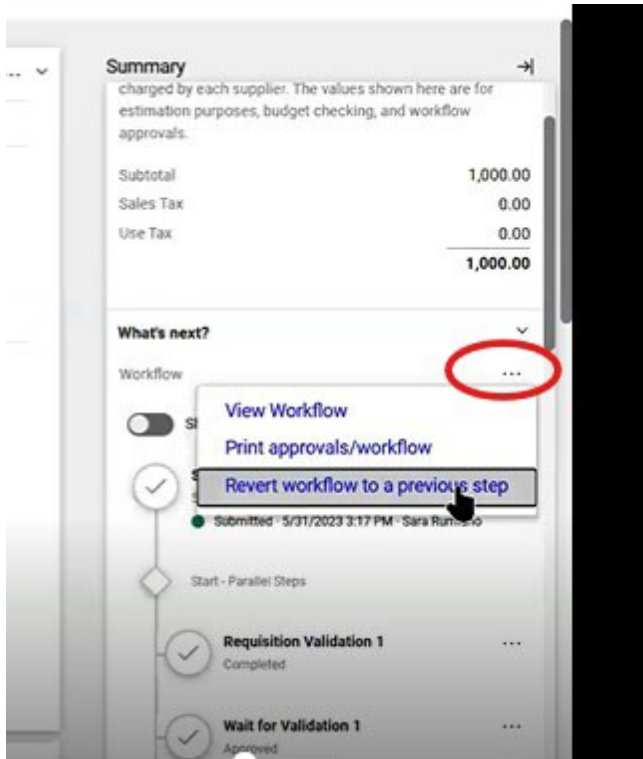
No comments have been added

Revert Workflow to Previous Step

This sends any document to a previous step in the Workflow. You may use this action if you have not approved the requisition but would like to revert the requisition back to the Requester. (Note: Return to Requester is another way to do the same thing.) The Requester may then edit the requisition and submit the requisition again to workflow. When reverting to a previous step, you would like the person in the previous step to review and/or make edits and then submit the requisition again to workflow.

To revert the requisition,

1. Open the requisition.
2. On the right, locate the Workflow panel.
3. Click on the three dots.
4. Select Revert workflow to previous step.
5. Select the step in the workflow to send the document back to



6. Add a reason for the reversion. Please note that the reason entered is only visible in the History tab.

Revert Reason Note
✕

Add reason for reverting to **DOA Approval - Catch-All**

500 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Back
Revert

In order to notify the person in the previous step of the revision, please add a comment.

1. Click back to open the requisition.
2. Go the Comments tab.
3. Add your message and tag the person to receive the email.
4. Return to Revert screen and complete action.

Summary Taxes/S&H PO Preview **1** Comments Attachments History

Records found: 0 Show comments for Requisition

ADD COMMENT **2** **4** ✓ ✕

Workflow reverted.

982 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient **3**

✓ Brian Cotham (Prepared by, Approved) <fbcfspqr@calstate.edu>

Attach file (optional)

Attachment Type

File

Link/URL

File Name

File

No comments have been added

Once reverted, the document will re-enter workflow starting at the step you selected.

Using History to View all Action Taken on the Requisition

You could always go back to the Requisition by searching for the Requisition Number, opening it, and reviewing the History. This allows you to view every action taken on the Requisition.

CSUBUY All Orders

Requisition **211476131**

Summary Taxes/S&H PO Preview Comments **1** Attachments **History**

Start date End date User Action Filter Clear All Filters Export CSV

1-18 of 18 Results 20 Per Page

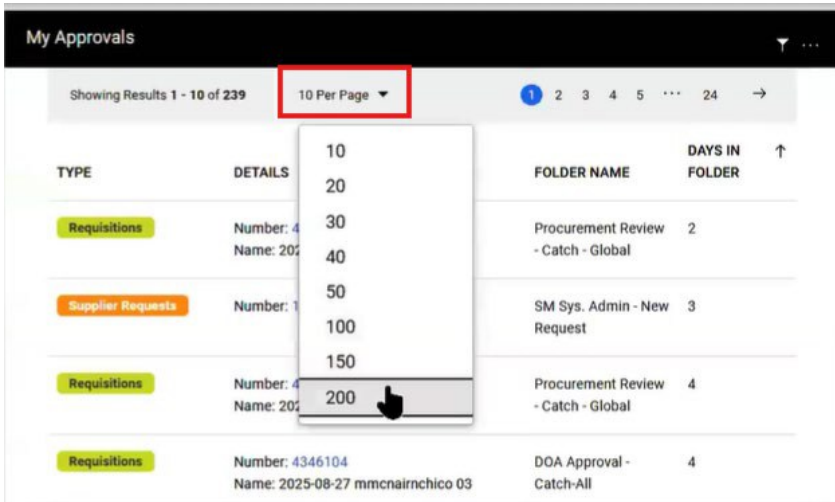
Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	1/26/2026 5:03:47 PM	Minna Chang	DOA Approval - DeptID	Requisition returned		Minna Chang	Mel(MaryEllen) Castillo	Mel, please kill this requisition. Thank you!
	1/26/2026 4:58:29 PM	System		Successful use tax callout to tax engine.	Sales Tax			
	1/26/2026 4:58:28 PM	Minna Chang	DOA Approval - DeptID	Requisition modified	Reference ID	empty	Test	

5-FILTERING MY APPROVALS ON HOME PAGE

To customize how you view the My Approval section, please see the available filter options.

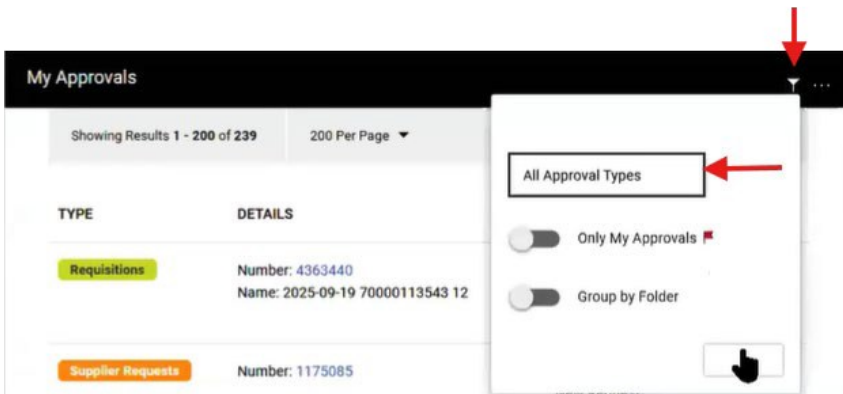
Number of Approvals on My Approval

You may adjust how many approvals you would like to see per page by going to the drop-down menu.

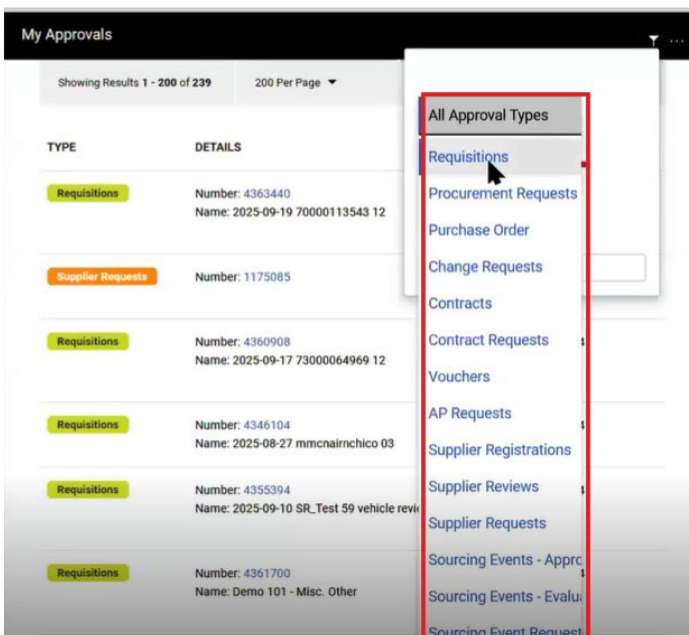


Filter for Type of Approvals

Use the filter icon and click on the box.



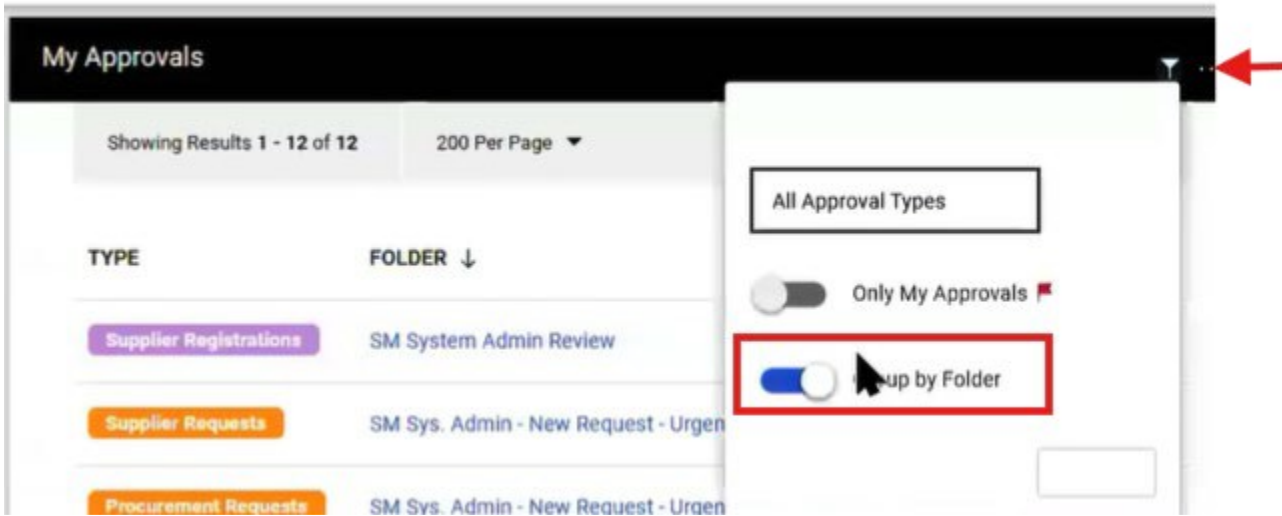
Select the type of approvals you would like to see:



Filter by Folder

Click on the filter icon and then move the switch to the right for **Group by Folder**.

Now, rather than seeing each document (requisition, voucher, etc), you see them grouped in folders.



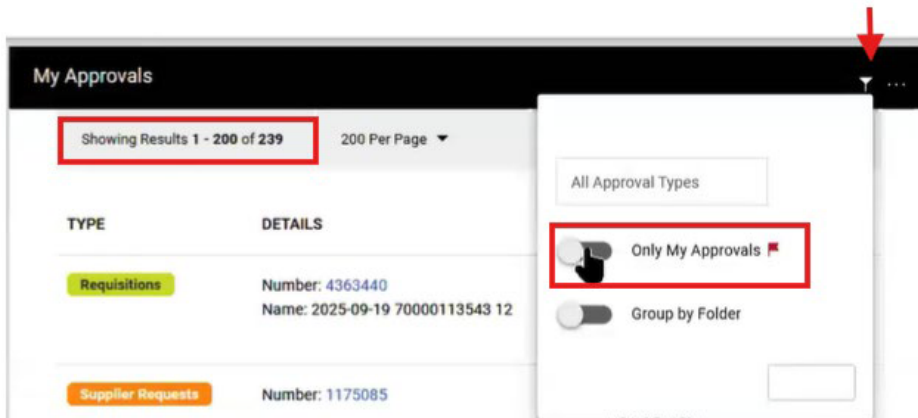
You will see that you can now filter by Folder.

The screenshot shows the 'My Approvals' page with the main table. The 'FOLDER' column header is highlighted with a red box. The table displays various approval types grouped by folder, with columns for 'TOTAL', 'ASSIGNED TO ME', 'OTHER', and 'NONE'.

TYPE	FOLDER ↓	TOTAL	ASSIGNED TO ME	OTHER	NONE
Supplier Registrations	SM System Admin Review	5	0	1	4
Supplier Requests	SM Sys. Admin - New Request - Urgent	28	0	0	28
Procurement Requests	SM Sys. Admin - New Request - Urgent	2	0	0	2
Supplier Requests	SM Sys. Admin - New Request	76	0	0	76
Procurement Requests	SM Sys. Admin - Extension - Urgent	7	0	0	7
Requisitions	Procurement Review - Catch - Global	16	0	1	15
Purchase Order	New FY - Hold For Distribution POs	3	0	0	3
Vouchers	My Voucher Approvals	1	1	0	0
Requisitions	My PR Approvals	6	6	0	0

Filter by My Approval

In My Approvals, you will see a list of all approvals needed. Below there are 239 approvals needed. To only see items that have been sent for your Approval, click on the **filter icon** and then move the switch to the right for **Only My Approvals**.



You now view only the 12 items assigned to you.

The screenshot shows the 'My Approvals' page with a header bar. Below the header, it says 'Showing Results 1 - 12 of 12' and '200 Per Page'. The table below shows the following data:

TYPE ↑	FOLDER	TOTAL	ASSIGNED		
			TO ME	OTHER	NONE
Change Requests	DOA Approval - Catch-All	27	0	0	27
Procurement Requests	SM Sys. Admin - New Request - Urgent	2	0	0	2
Procurement Requests	SM Sys. Admin - Extension - Urgent	7	0	0	7
Purchase Order	New FY - Hold For Distribution POs	3	0	0	3
Requisitions	DOA Approval - Catch-All	51	1	1	49
Requisitions	Procurement Review - Catch - Global	16	0	1	15

CHAPTER 5: ORDER SEARCHES

1-ORDER SEARCHES

There are multiple ways to search for orders or documents in CSUBUY. The first thing to keep in mind is that a complete order has the following documents associated with it: Requisition, Purchase Order, and Voucher.

Below reflects the documents associated with an order or purchase.

If you click on any of the blue hyperlink as shown below, you will be able to see the related documents in the workflow section.

<input type="checkbox"/>	4385371	Requisition	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:03:33 PM	10/23/2025 2:10:18 PM	Acme Corporation ⓘ	62,000.00 USD
<input type="checkbox"/>	DP0000392T	Purchase Order	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:10:17 PM	10/23/2025 2:10:47 PM	Acme Corporation ⓘ	62,000.00 USD
<input type="checkbox"/>	C003515T	Voucher	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:10:42 PM	10/23/2025 2:19:02 PM	Acme Corporation ⓘ	62,000.00 USD

For example, if clicking on the blue hyperlink number for Requisition, the below is provided on the workflow section. You may click on the blue hyperlink to bring up the Purchase Order and Voucher.

Summary
→|

Completed

Total (62,000.00 USD) ▼

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

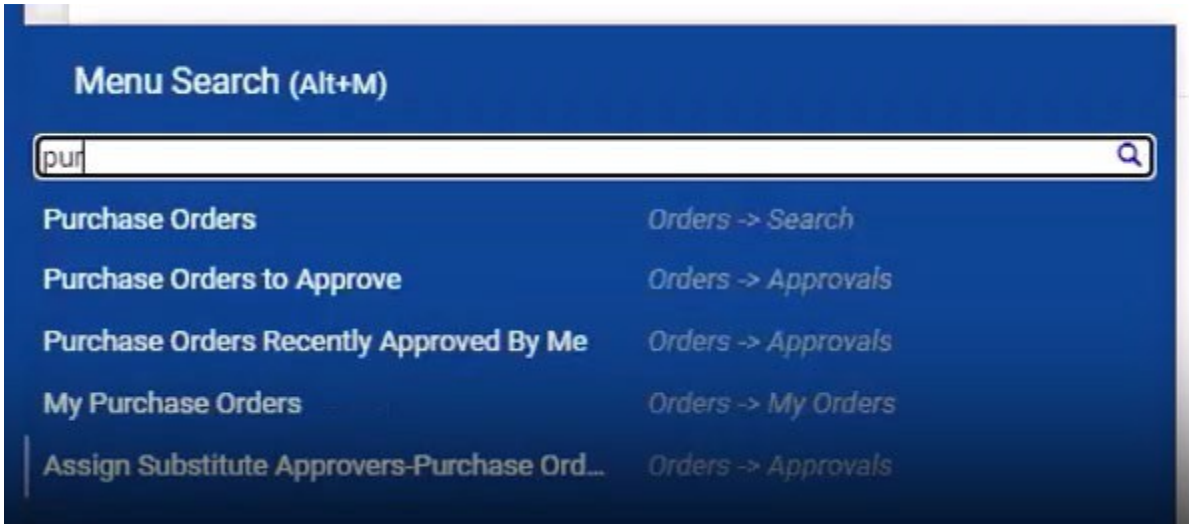
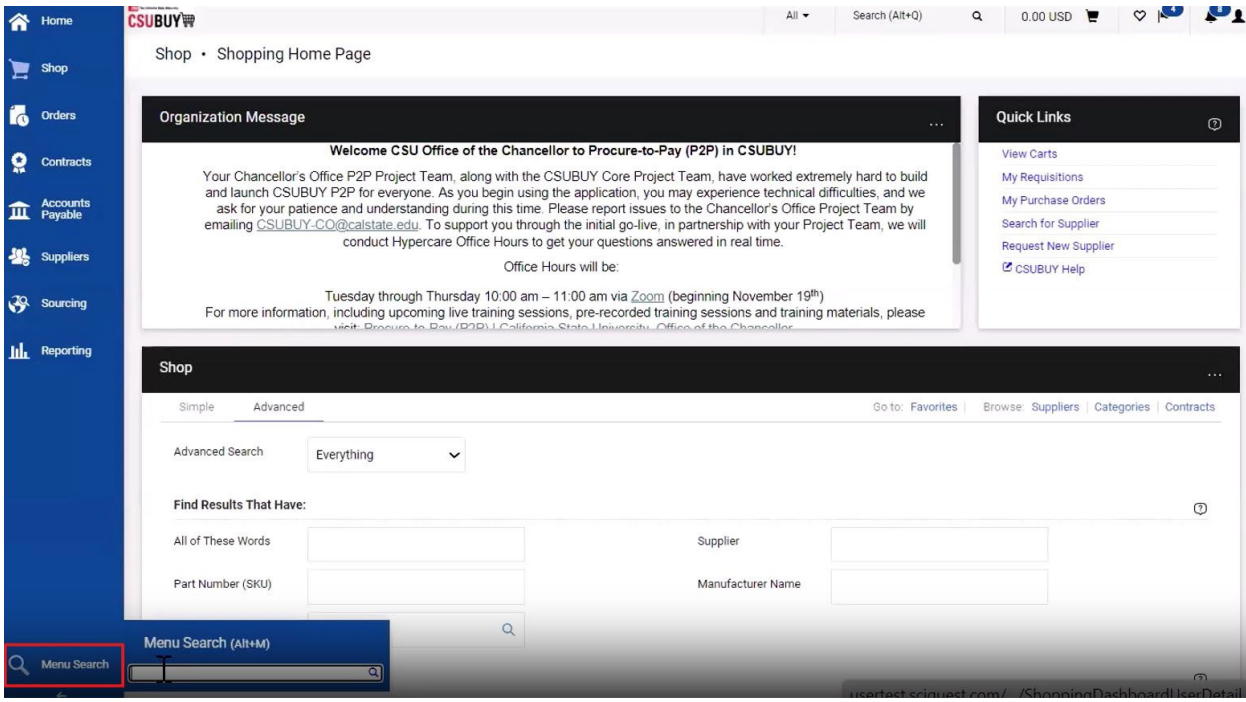
Subtotal	62,000.00
Sales Tax	0.00
Use Tax	0.00
	62,000.00

Related Documents ▼

- [Purchase Order: DP0000392T](#)
- [Voucher: C003515T](#)

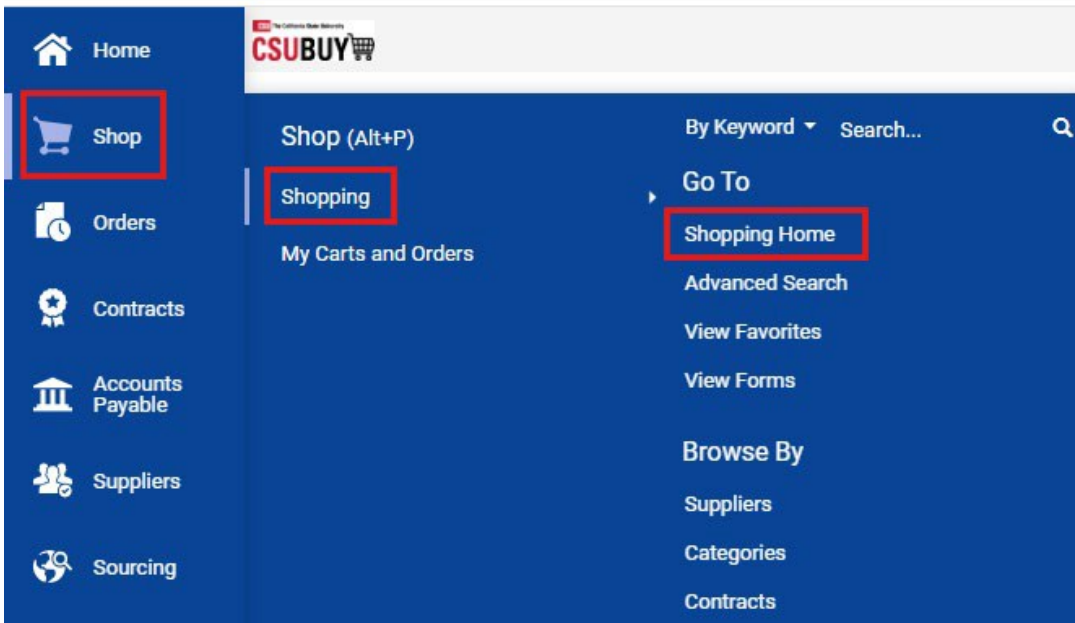
Navigation Menu Search

Typing in the Menu Search field brings up other specific areas to search as shown below. Note: this is not for Product Searches, which is used for Shopping.

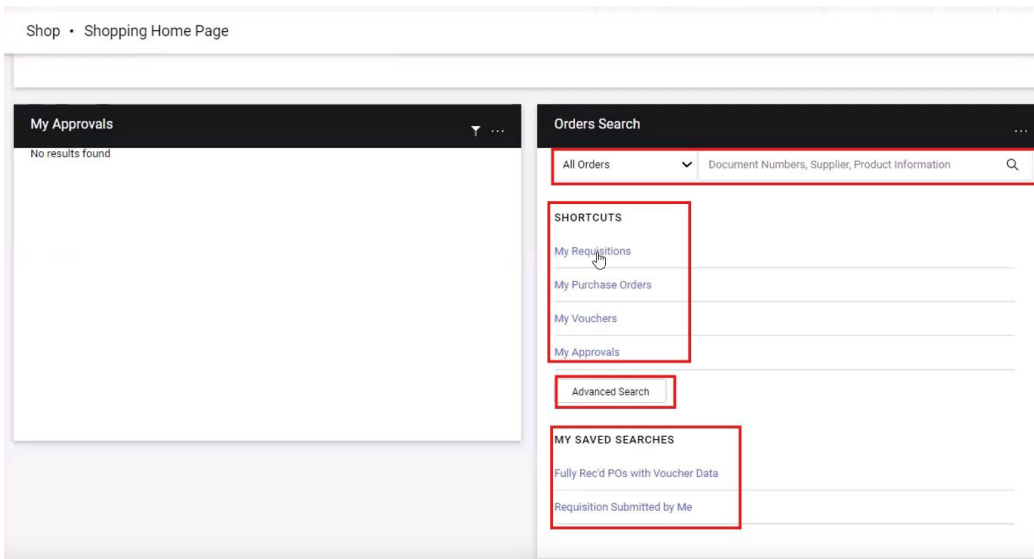


Order Search on the Shopping Home Page

You may perform an Order Search from the Shopping Home Page. Navigate to the Shopping Home Page by going to Shop>Shopping >Shopping Home. Then go to the Order Search section.

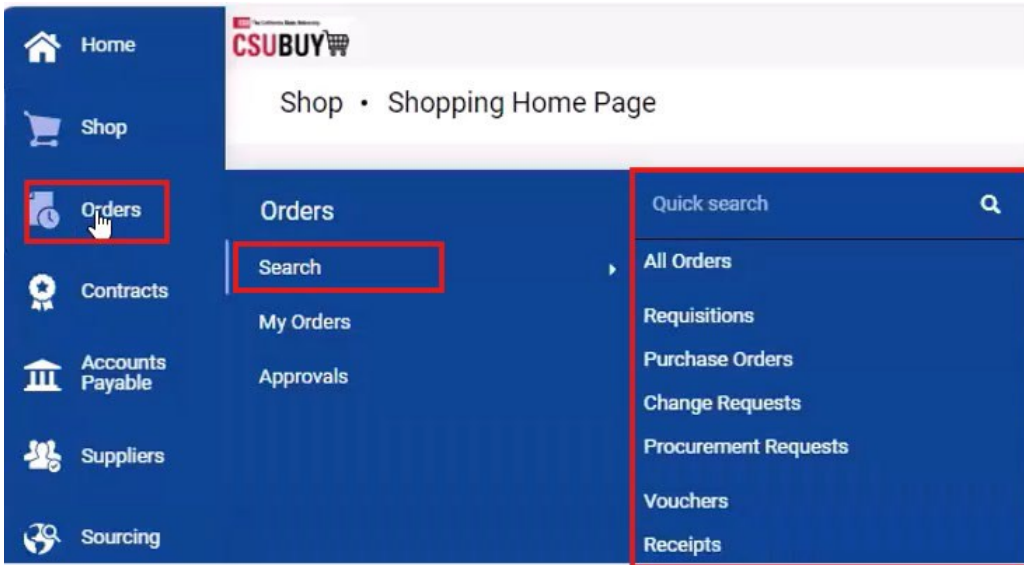


1. The top section with a drop-down menu allows you to search based on specific information including individuals with roles in CSUBUY.
2. **Shortcut** – Search for specific types of documents in which **you are the owner**.
3. **Advanced Search** – Clicking on this takes you to All Orders search results and includes Quick Filters to choose a supplier, business unit, order owner, approved by, commodity code, contract type, participant, pending approver, product flags, status flags, or supplier class.
4. **My Saved Searches** – These are the searches that you have created and saved.



Order Search using Fly Outs

In the Orders Fly Outs, type in a Quick Search (similar to the Home Page) with the magnifying glass, or you may select a search by specific type of document such as Requisitions and Purchase Orders. Note these searches return documents owned by others besides you.

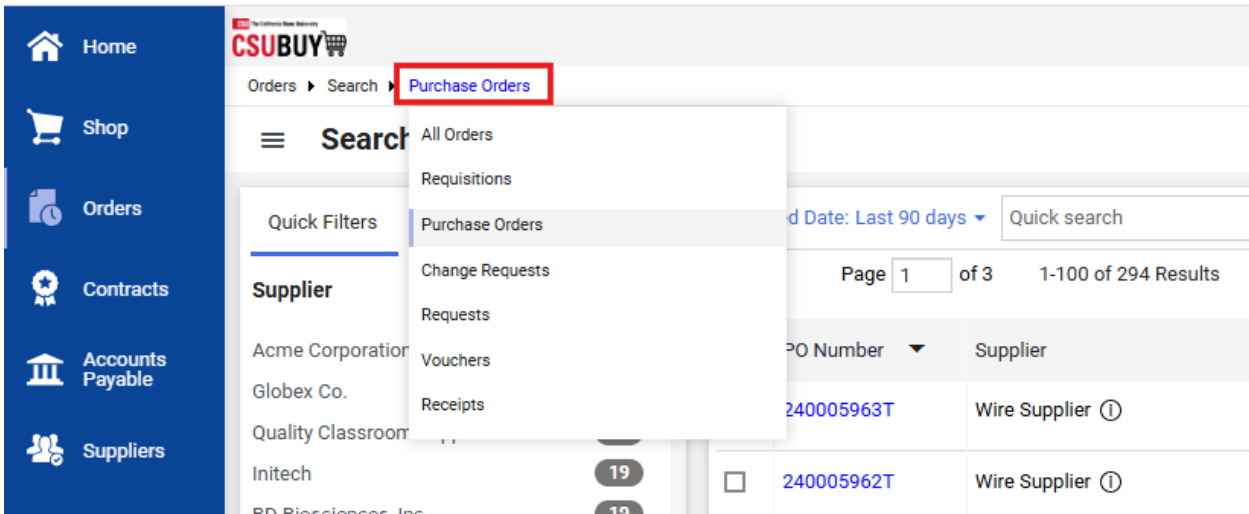


The search result will return the type of document you select created in the last 90 days.

For example, if you select Purchase Orders, you will receive the following results. You may adjust the **Create Date** by clicking on the drop-down. You may type a **Quick search** from the Purchase Orders. You may also **Add Filters** to narrow your search further. (See Section 2 for how to Filter)

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
240005896T	Chelsea's Construction Company	10/28/2025 4:14:46 PM	Completed	4389030	Michael Pruitt	Sent To Supplier	No Matches	55,000.00 USD
240005892T	Chelsea's Construction Company	10/28/2025 4:12:48 PM	Completed	4389026	Michael Pruitt	Sent To Supplier	No Matches	41,000.00 USD
240005869T	BD Biosciences, Inc	10/28/2025 3:49:47 PM	Completed	4386823	Mel(MaryEllen) Castillo	Sent To Supplier	Partially Matched	27,625.00 USD
240005801T	Quality Classroom Supplies	10/28/2025 2:20:54 PM	Completed	4388831	Kimberly Mowl	Sent To Supplier	No Matches	552.50 USD

If you click on the blue Purchase Order hyperlink, the drop-down menu will appear to change your search to other types of documents, such as All Order or Requisitions.

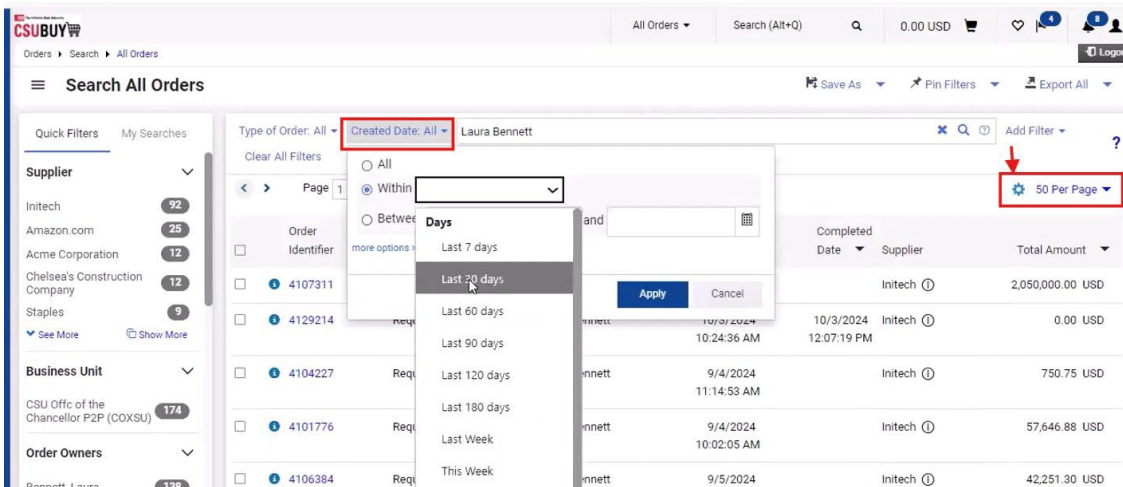


2-FILTERING ORDER SEARCHES

When search results come up, you can filter the results to narrow down the data returned.

You may adjust the **number of results** you would like to see per page by clicking on the gear and selecting number per page.

You may also filter by **Create Date** of the document by entering a date range or by entering the search by past days, week, month as shown below.



Quick Filters

On the left side of your search results, Quick Filters have multiple predefined filters.

CSUBUY

Orders > Search > Purchase Orders

Search Purchase Orders

Quick Filters My Searches Created Date

Supplier

- Acme Corporation 52
- Globex Co. 29
- Quality Classroom Supplies 26
- Initech 19
- BD Biosciences, Inc 19
- See More Show More

PO Status

- Completed 283
- Pending 6
- Show More

Business Unit

- LB - CA State University Long Beach P2P (LBXMP) 205
- LB - CSULB Research Foundation P2P (LBXDN) 46
- LB - Long Beach State Foundation P2P (LBX49) 38
- Show More

PO Owner

- Mowl, Kimberly 100
- Kelly, Connor 32
- Teodoro, Stacey 30
- Castillo, Mel(MaryEllen) 25

PO Numb 24000

NOTE: Different filters are available based on the document being searched. Purchase Order Searches will have different filters from All Order searches.

You may also add filters and clear all filters:

Search All Orders

Quick Filters My Searches

Type of Order: All Created Date: Last 60 days

Add Filter Clear All Filters

Find search filters

Identifiers

- Order Id

Dates

- Approved Date
- Completed Date
- Last Modified

General Information

- Approved By
- Bill To
- Business Unit
- Contract Type

Supplier

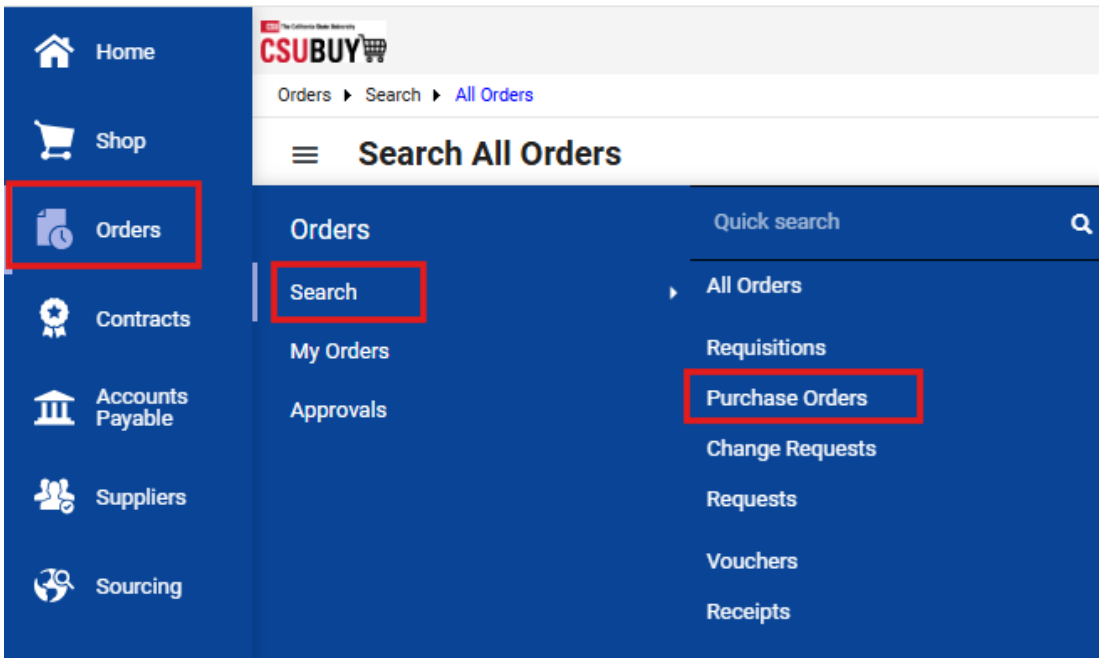
- Initech 63
- Amazon.com 19
- Staples 9
- Acme Corporation 8
- Chelsea's Construction Company 8
- See More Show More

Business Unit

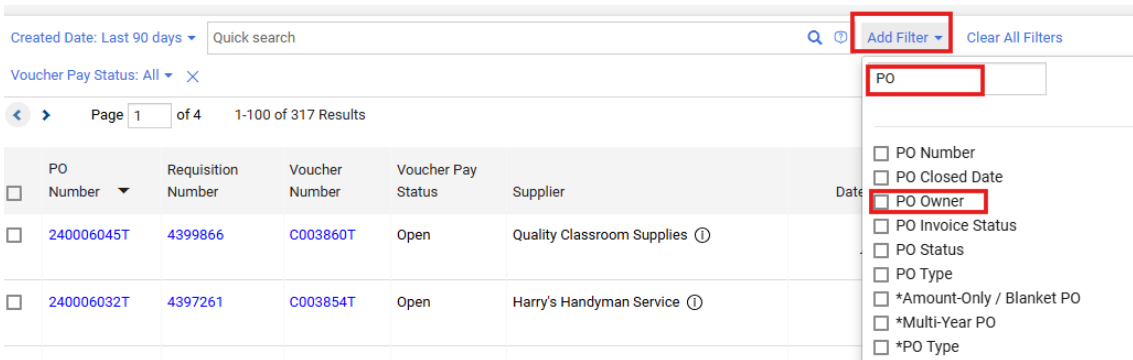
- CSU Offc of the Chancellor P2P (COXSU) 117

Order Owners

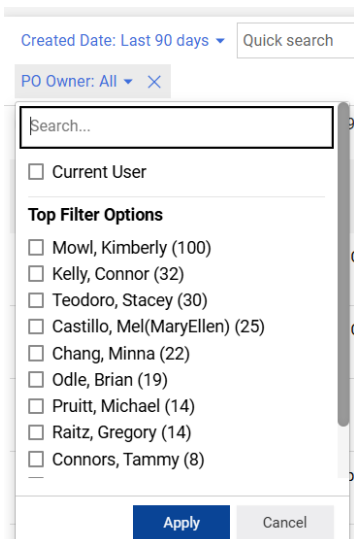
For example, when searching Purchase Orders



Add a PO Owner filter.



The following filter appears:



Another example is adding a filter for **Voucher Pay Status**.

The following filter appears. Check the desired boxes and then click Apply.

The screenshot shows a search results interface. At the top, there is a search bar with 'Created Date: Last 90 days' and a 'Quick search' field. To the right of the search bar are 'Add Filter' and 'Clear All Filters' buttons. Below the search bar, a filter dropdown is open for 'Voucher Pay Status: All'. The dropdown menu contains three options: 'No Pay Status', 'Open', and 'Paid', each with an unchecked checkbox. Below the dropdown are 'Apply' and 'Cancel' buttons. The main table below shows search results with columns for PO Number, Requisition Number, Status, Supplier, Created Date/Time, PO Status, PO Owner, and Shipments. Two rows are visible, both with 'Completed' status.

You may also Pin Filters, which will keep the Filter whenever you go to that particular Search. See **Section 3-Customizing Search Results** for more information.

The screenshot shows a search results page with a 'Pin Filters' button highlighted in a red box. The page displays a table of search results with columns for PO Number, Requisition Number, Voucher Number, Voucher Pay Status, Supplier, Created Date/Time, PO Status, PO Owner, Shipment Status, Matching Status, and Total Amount. The table shows two rows of results, both with 'Completed' status and 'No Matches'.

The screenshot shows the 'Pin Filters' dropdown menu. The menu is titled 'Pin Filters Additional options' and contains two items: 'Pin Columns' and 'Remove Pinned Columns'. The 'Pin Filters' button is also visible in the background.

3-CUSTOMIZING SEARCH RESULTS

When search results come up, you may customize the information appearing on the Search Result page.

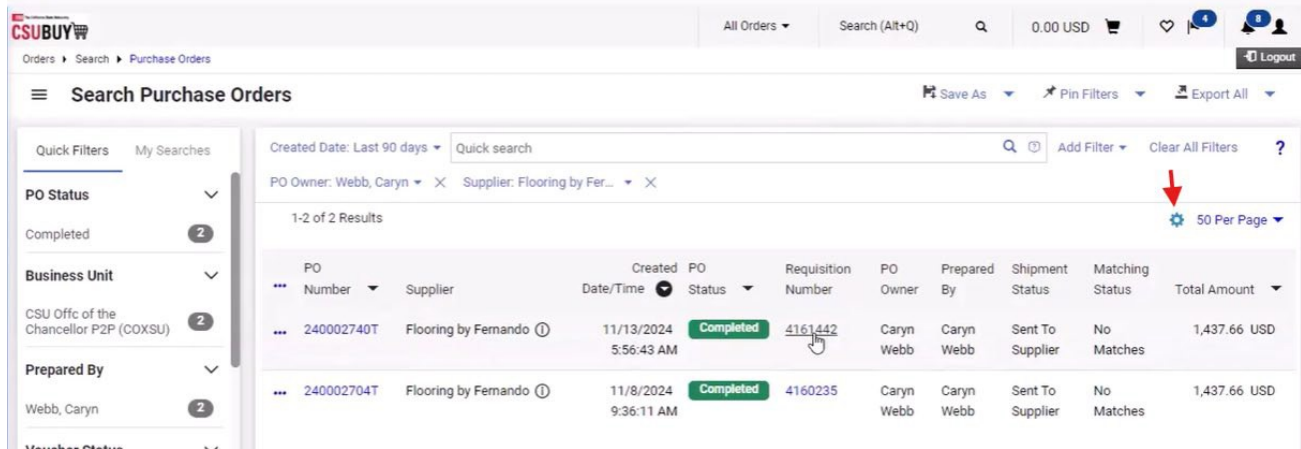
Please note that each Search Page must be customized separately. For example, the Purchase Order and Requisition search results each require their own customization.

Search Purchase Orders and My Purchase Orders in the Order Search section share the same customization settings. The only difference is that My Purchase Orders displays only the purchase orders assigned to you.

Customize Columns

Please follow these steps to customize the information your search results display:

Click on the gear:



The screenshot shows the CSUBUY Purchase Orders search interface. The top navigation bar includes the CSUBUY logo, 'All Orders', a search bar (Alt+Q), '0.00 USD', and a 'Logout' button. The main search area is titled 'Search Purchase Orders' and includes a 'Save As' button, 'Pin Filters', and 'Export All'. The search criteria are 'Created Date: Last 90 days' and 'Quick search'. The results are filtered by 'PO Owner: Webb, Caryn' and 'Supplier: Flooring by Fer...'. The results table shows two entries:

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Prepared By	Shipment Status	Matching Status	Total Amount
240002740T	Flooring by Fernando	11/13/2024 5:56:43 AM	Completed	4161442	Caryn Webb	Caryn Webb	Sent To Supplier	No Matches	1,437.66 USD
240002704T	Flooring by Fernando	11/8/2024 9:36:11 AM	Completed	4160235	Caryn Webb	Caryn Webb	Sent To Supplier	No Matches	1,437.66 USD

When clicking on the gear, the below pop-up window appears.

You may **select the information** you would like to appear by clicking on the check box next to the item (section on left). When you click the checkbox, the item will appear on the right. The items on the right are information that will appear on your Search Results.

You may **change the order** up or down or drag the item to where you would like the item to appear.

Finally, make sure you **check off Pin Columns as my defaults**.

(If you do not check the box, the column configuration will disappear the next time you go into the Search)

Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...

Pin Columns as my defaults

- Account *
- Account Override *
- Accounting Date
- Amount-Only / Blanket PO *
- AP Status
- Approval Actions
- Approval Steps
- Asset *
- Asset Profile ID *
- Bill To
- Business Unit
- Business Unit *
- Buyer *
- Cancellation Date *
- Change Request No.

PO Number	↑ ↓
Supplier	↑ ↓ 🗑️
Created Date/Time	↑ ↓ 🗑️
Requisition Number	↑ ↓ 🗑️
PO Status	↑ ↓ 🗑️
PO Owner	↑ ↓ 🗑️
Shipment Status	↑ ↓ 🗑️
Matching Status	↑ ↓ 🗑️
Total Amount	↑ ↓ 🗑️
Voucher Number	↑ ↓ 🗑️
Voucher Pay Status	↑ ↓ 🗑️

Customize Filters on Search Result

You could also customize the filters you would like to have on your Search Results. Please note that you would need to customize each document Search separately. The example below is for **Search Product Orders**.

Click on **Add Filter**. A list of items will appear. Check the box for information you would like to filter. You may add more filters as you need them.

In the below example, the Voucher Pay Status filter was already added but you may add more filters.

Subbuy

Orders > Search > Purchase Orders

Search Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search

Voucher Pay Status: All

Page 1 of 4 1-100 of 302 Results

PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Supplier	Created Date/Time	PO Status
<input type="checkbox"/>	240005983T	4391514	No Pay Status	Quality Classroom Supplies	10/30/2025 1:22:49 PM	Corr
<input type="checkbox"/>	240005982T	4391593	No Pay Status	Acme Corporation	10/30/2025 1:09:02 PM	Corr

Save As Pin Filters Export All

Add Filter Clear All Filters

Find search filter...

- Voucher Pay Status
- Change Request No.
- Contract Number
- Ext. Requisition Number
- PO Number
- Packing Slip Number(s)
- Receipt Name
- Receipt Number

100 Per Page

Total Amount

The filter appears, and I may select which status I want to appear.

The screenshot shows a search interface with a filter dropdown menu open. The dropdown menu is titled "Voucher Pay Status: All" and contains three options: "No Pay Status", "Open", and "Paid". The "Add Filter" button is highlighted with a red box. The main table shows search results with columns for PO Number, Requisition Number, Supplier, Created Date/Time, PO Status, PO Owner, and Shipment Status.

PO Number	Requisition Number	Supplier	Created Date/Time	PO Status	PO Owner	Shipment Status
240004331T	43609	Acme Corporation	9/17/2025 2:59:19 PM	Completed	Minna Chang	Sent To
DP0000295T	43605	Globex Co.	9/17/2025 11:34:30 AM	Completed	Minna Chang	No Shi

To keep the filter so that it always appears on the **Search Product Orders**, click on the Pin Filters icon.

The screenshot shows the same search interface, but now the "Pin Filters" icon is highlighted with a red box. The filter "Voucher Pay Status: All" is now pinned to the top of the search results. The table shows search results with columns for PO Number, Requisition Number, Voucher Number, Voucher Pay Status, Supplier, Created Date/Time, PO Status, PO Owner, Shipment Status, Matching Status, and Total Amount.

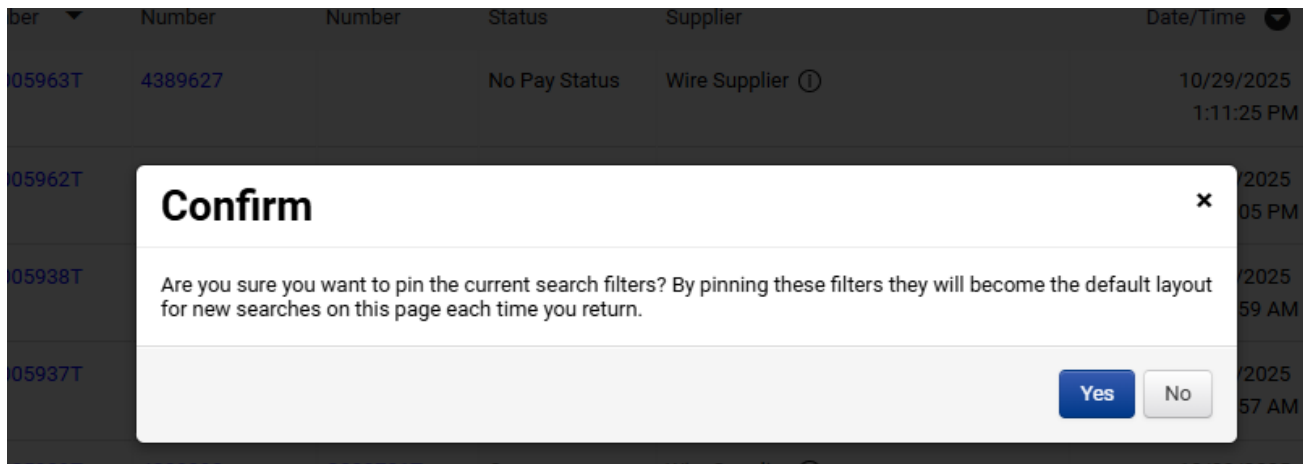
PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Supplier	Created Date/Time	PO Status	PO Owner	Shipment Status	Matching Status	Total Amount
240005963T	4389627		No Pay Status	Wire Supplier	10/29/2025 1:11:25 PM	Completed	Mel(MaryEllen) Castillo	Sent To Supplier	No Matches	50,000.00 USD
240005962T	4389632		No Pay Status	Wire Supplier	10/29/2025 12:54:05 PM	Completed	Mel(MaryEllen) Castillo	Sent To Supplier	No Matches	50,000.00 USD

The drop-down menu allows you to Pin Filters, Pin Columns and Remove Pinned Columns

The close-up shows the "Pin Filters" dropdown menu with three options: "Pin Filters", "Pin Columns", and "Remove Pinned Columns". The "Pin Filters" option is highlighted with a black box.

- Pin Filters
- Pin Columns
- Remove Pinned Columns

Click Yes:

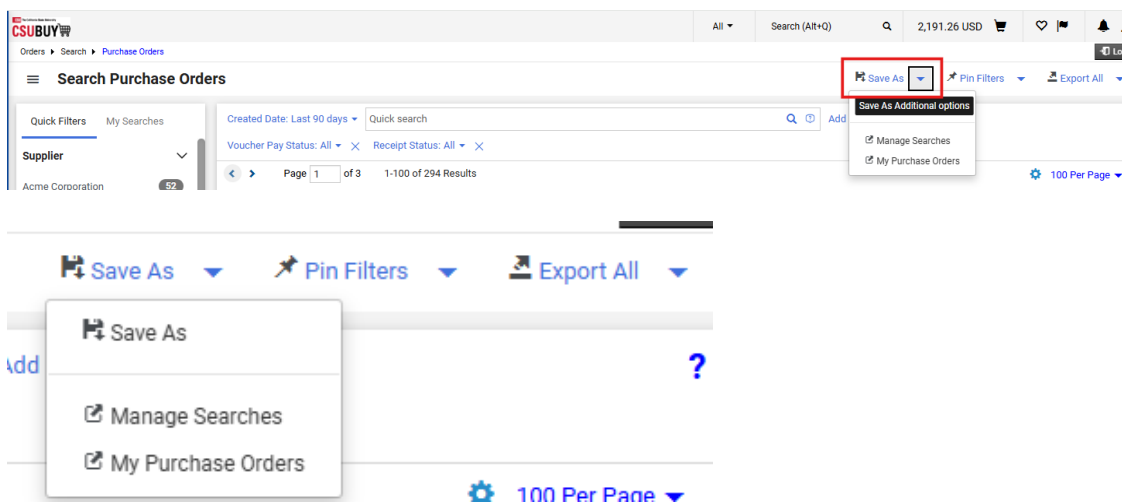


4-SAVING SEARCHES

Once you have customized a Search, you may save the search.

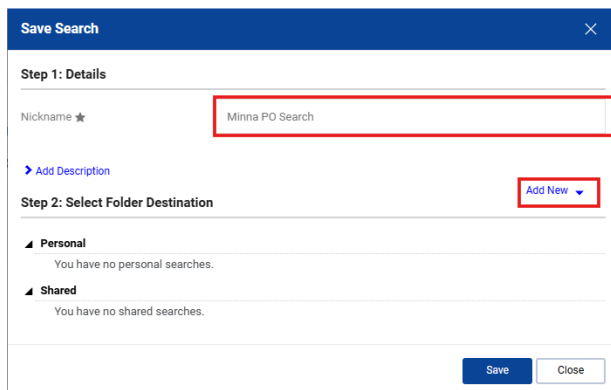
Creating a Saved Search

After customizing a search, click on **Save As**.



Create the name of the Search in the Nickname field.

Click on Add New to create a Folder if you would like to create a new folder for your search.



The **Create Personal Folder** box will come up. Add the name of the folder you would like in the Name field and a Description, as needed. Then click **Save Changes**.

Create Personal Folder [X]

Name ★

Description

254 characters remaining

★ Required

Select the folder and **Save**.

Save Search [X]

Step 1: Details

Nickname ★

[Add Description](#) [Add New](#) ▾

Step 2: Select Folder Destination

▲ **Personal**

Minna's Searches

▲ **Shared**

You have no shared searches.

The saved search now displays your Search Name.

CSUBUY The Customer Store

Orders ▸ Search ▸ Purchase Orders

Minna PO Search

Quick Filters My Searches

Supplier ▾

Acme Corporation 52

Globex Co 29

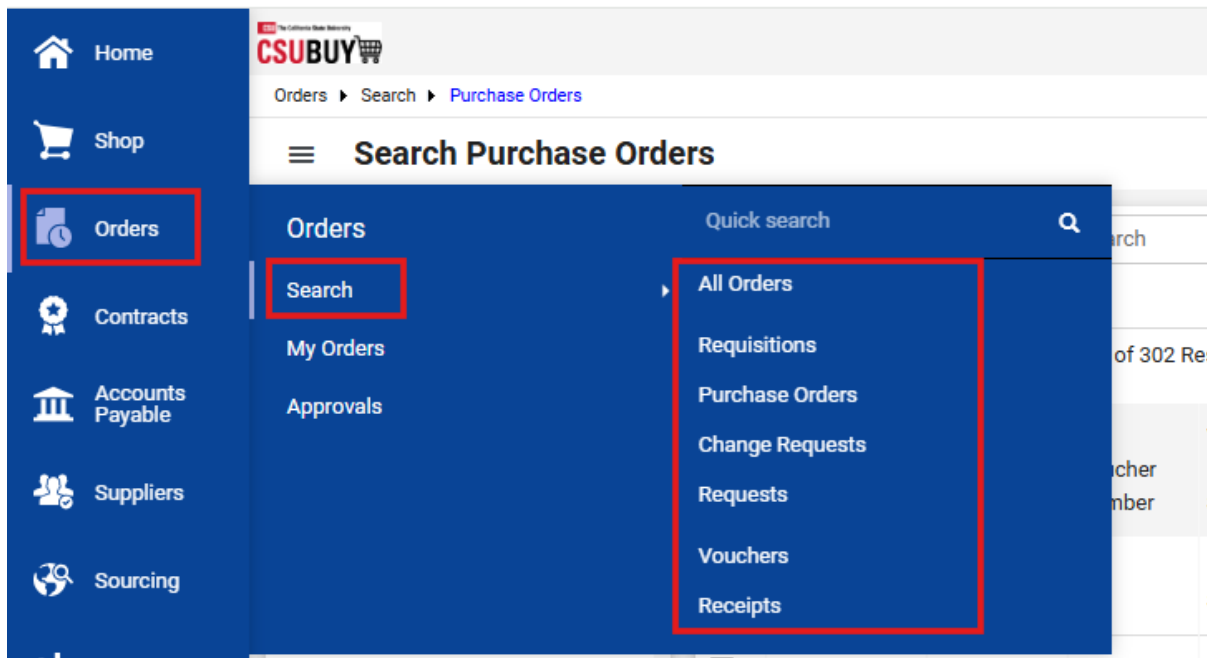
Created Date: Last 90 days ▾ Quick search

Voucher Pay Status: All ▾ X Receipt Status: All ▾ X

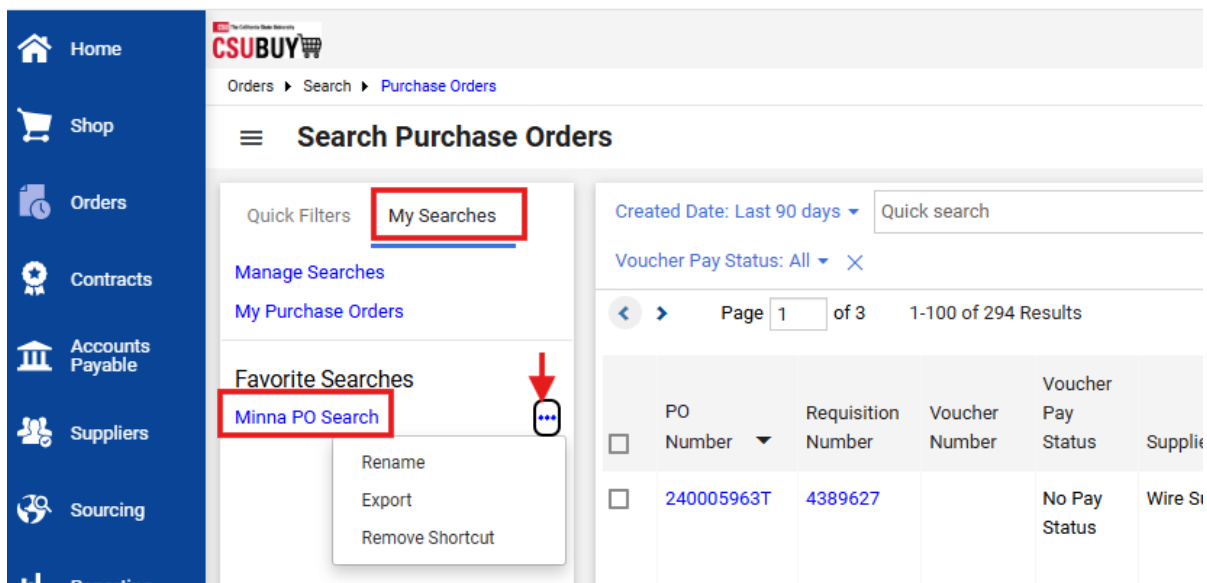
Page 1 of 3 1-100 of 294 Results

Finding Your Saved Search

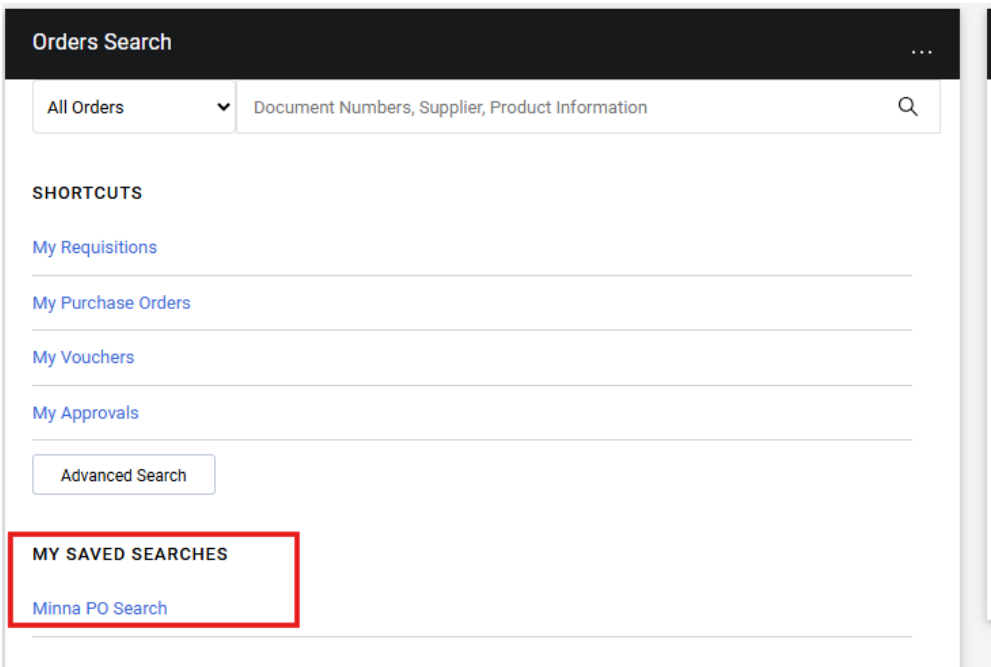
You may locate your saved search by going to the Fly Out and selecting the document for your saved search. Since the example is a saved search for Purchase Order, Purchase Orders below should be selected below.



Then click on the My Searches tab and the saved search will be under Favorite Searches. The three dots below also allow you to **rename, export, or remove the search**.



You may also locate your Saved Search on the Home Page in the Orders Search section.

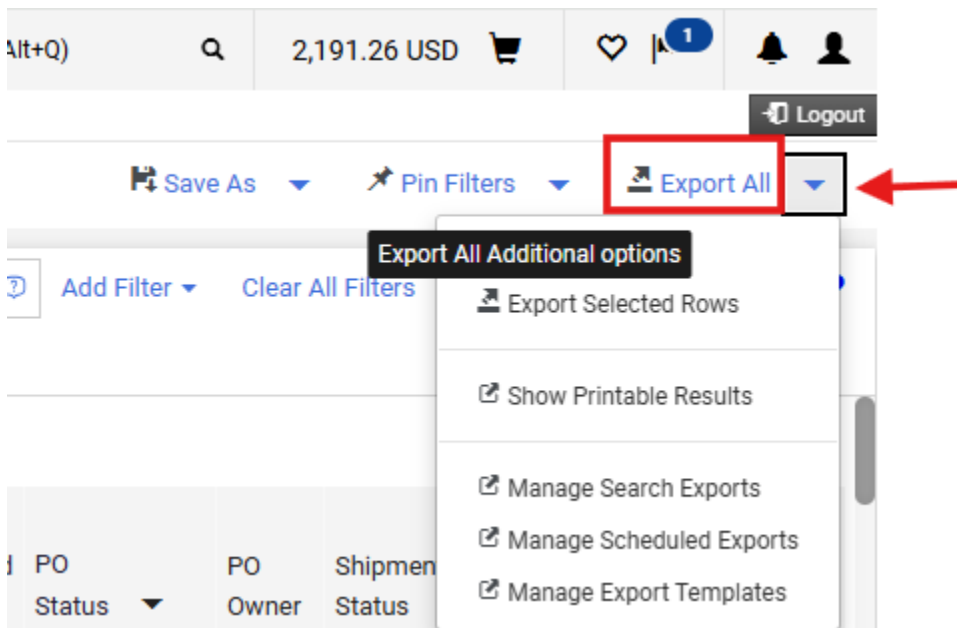


5-EXPORTING SEARCH RESULTS TO A REPORT

You can export your search results to a report.

Click on Export All to export the entire search results.

Or you may click on the arrow, which provides other options.



- Export All – To export all your search results.
- Export Selected Rows – Check off the box for rows you would like to export.
- Show Printable Results – Creates a report that you may print or save as a pdf.

- Manage Search Export – Takes you to all your exports.
- Manage Scheduled Export – Takes you to all your scheduled exports.
- Manage Export Templates – Takes you to all your export templates.

Export All

When Click Export All and/or selecting Export All, the pop-up box appears.

You may change the Title in the field below:

You may also change the Type of export. In most cases, you would select Screen Layout.

When you click Submit, the following pop-up window appears. Click on the blue hyperlink, which will take you to a screen with all your search exports.



Click on the blue hyperlink with your title as shown below and then the file will export.

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for All Orders	Completed	All Orders	Screen Layout (Excel)	10/30/2025 2:22:09 PM	10/30/2025 2:22:14 PM	11/6/2025	Total Records: 487	Delete

Export Selected Rows

When selecting Export Selected Rows, only the rows that you check off as shown below will be exported. Note: Only Screen Layout is available

<input type="checkbox"/>	Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
<input checked="" type="checkbox"/>	C003782T	Voucher	Pending	Kimberly Mowl, Mai Luu	11/3/2025 3:25:48 PM		Scoops Food Truck
<input checked="" type="checkbox"/>	C003780T	Voucher	Pending	Eric Murakami, Kimberly Mowl	11/3/2025 3:25:38 PM		Harry's Handyman Service
<input checked="" type="checkbox"/>	C003776T	Voucher	Complete	Eric Murakami, Kimberly Mowl	11/3/2025 3:03:12 PM	11/3/2025 3:27:49 PM	Harry's Handyman Service
<input type="checkbox"/>	C003774T	Voucher	Complete	Kimberly Mowl, Mai Luu	11/3/2025 2:55:02 PM	11/3/2025 3:35:46 PM	Quality Classroom Supplies
<input type="checkbox"/>	C003783T	Voucher	Pending	Kimberly Mowl, Ronald Soth	11/3/2025 2:40:29 PM		Acme Corporation
<input type="checkbox"/>	C003773T	Voucher	Complete	Kimberly Mowl, Susie Lopez	11/3/2025 2:38:32 PM	11/3/2025 3:56:06 PM	Flooring by Fernando
<input type="checkbox"/>	C003770T	Voucher	Pending	Eric Murakami, Kimberly Mowl	11/3/2025 2:36:48 PM		Ken's Catering

Show Printable Results

This is helpful if you need a hard or soft copy of your search results. When selecting this option, a new screen will appear as shown below. Click on Print to receive your report.

PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Receipt Status	Supplier	Created Date/Time	PO Status	PO Owner	Shipment Status	Matching Status	Total Amount
240005983T	4391514		No Pay Status	No Receipts	Quality Classroom Supplies	10/30/2025 1:22:49 PM	Completed	Kimberly Mowl	Sent To Supplier	No Matches	55.25 USD
240005982T	4391593		No Pay Status	No Receipts	Acme Corporation	10/30/2025 1:09:02 PM	Completed	Connor Kelly	Sent To Supplier	No Matches	55.25 USD
240005975T	4391610		No Pay Status	No Receipts	Acme Corporation	10/30/2025 12:49:05 PM	Completed	Connor Kelly	Sent To Supplier	No Matches	55.25 USD

Type (not available)

- The drop-down menu for Type in the Export window has the following selections:
 - Screen Layout – Export will appear as shown on the screen.
 - Full Export – Exports every information available providing a folder with multiple reports. This is not recommended.
 - Transaction Export – Exports search results for rows checked off.
 - User Defined Template

CHAPTER 6: OTHER TOPICS & REFERENCES

1-LIST OF COMMODITY CODES TO ACCOUNT CODES (USE ACCOUNT OVERRIDE TO UPDATE ACCOUNT YOU NEED)

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT
Capital Projects	100001	Capital-Preliminary Plans	607022	Capital De
Capital Projects	100002	Capital-Construction	607031	Capital-Co
Capital Projects	100004	Group II Capital Assets	607009	Group II E
Capital Projects	100005	Real Estate Acquisition	607002	Acquisitio
Capital Projects	100006	Capital-Pollution Remediation Costs	607043	Capital - P
Capital Projects	100007	Capital-State Agency Costs	607032	Construct
Capital Projects	100008	Capital-Construction Other	607033	Construct
Capital Projects	100009	Capital-Master Plan	660066	Cap-Strat
Equipment	105002	Equipment	619001	Other Equ
Equipment	105003	Vehicles	619001	Other Equ
Equipment	105004	Farm Equipment	619001	Other Equ
IT	115001	IT Accessories/Supplies	660940	Computer
IT	115002	IT Hardware	616002	I/T Hardw
IT	115003	IT Hardware Maintenance	616801	I/T Hardw
IT	115004	IT Software	616003	I/T Softwa
IT	115005	IT Software Maintenance	616003	I/T Softwa
IT	115006	Telecommunications Supplies	616001	I/T Comm
IT	115007	Telecommunications Services	616001	I/T Comm
IT	115008	IT Professional Services	613001	Contractu
IT	115009	IT Consulting	613800	Consultin
Leases/Rentals	140001	IT Lease/Rental Services	616002	I/T Hardw
Leases/Rentals	140002	Equipment Lease/Rental Services	660822	Equipmen
Leases/Rentals	140003	Real Estate & Space Lease/Rental Services	660041	Space Ren
Leases/Rentals	140004	Vehicle Lease/Rental Services	660937	Vehicle Le
Maintenance, Repair, and Operations	145001	Building Maint/Repair Services	660061	Building M
Maintenance, Repair, and Operations	145002	Custodial Maint/Repair Services	660003	Supplies a
Maintenance, Repair, and Operations	145003	Elevator Maint/Repair Services	660061	Building M
COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT
Maintenance, Repair, and Operations	145004	Equipment Maint/Repair Services	660003	Supplies a
Maintenance, Repair, and Operations	145006	Landscape Maint/Repair Services	660064	Rep & Ma
Maintenance, Repair, and Operations	145007	Vehicle Maint/Repair Services	660932	Motor Ve
Maintenance, Repair, and Operations	145009	Custodial Supplies	660812	Custodial
Maintenance, Repair, and Operations	145010	Facilities Supplies	660003	Supplies a
Maintenance, Repair, and Operations	145011	Housing Supplies	660003	Supplies a
Maintenance, Repair, and Operations	145013	Vehicle Parts/Accessories	660932	Motor Ve
Maintenance, Repair, and Operations	145014	Utilities Maint/Repair Services (Co-Generation Plants)	660003	Supplies a
Maintenance, Repair, and Operations	145015	Housing Maint/Repair Services	660061	Contractu

Misc. Other	150003	Works of Art	660003	Supplies a
Misc. Other	150006	Controlled Substances	660003	Supplies a
Misc. Other	150007	Furniture	619804	Furniture
Misc. Other	150008	Official Guest	660003	Supplies a
Misc. Other	150009	Official Guest Travel	660003	Supplies a
Misc. Other	150011	Insurance	660010	Insurance
Misc. Other	150012	Memberships	660816	Dues and
Misc. Other	150015	Subscription/Publication (non-IT)	660816	Dues and
Misc. Other	150018	Training/Professional Dev	660009	Profession
Misc. Other	150019	Weapons	619001	Other Equ
Misc. Other	150021	Shipping/Freight (Non-Taxable)	660001	Postage a
Misc. Other	150022	Shipping/Freight & Handling (Taxable)	660001	Postage a
Misc. Other	150025	Accreditation Services	660043	Accredita
Non-Recycled Items	156001	Antifreeze - Non-Recycled	660003	Supplies a
Non-Recycled Items	156002	Mulch/Compost - Non-Recycled	660003	Supplies a
Non-Recycled Items	156003	Glass Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156004	Lubricating Oils - Non-Recycled	660003	Supplies a
Non-Recycled Items	156005	Paint - Non-Recycled	660003	Supplies a
Non-Recycled Items	156006	Paper - Non-Recycled	660003	Supplies a
Non-Recycled Items	156007	Plastic - Non-Recycled	660003	Supplies a
Non-Recycled Items	156008	Metals - Non-Recycled	660003	Supplies a
COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT
Non-Recycled Items	156009	Tire Derived Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156010	Tires Larger 15in - Non-Recycled	660003	Supplies a
Non-Recycled Items	156011	Tires Smaller 15in - Non-Recycled	660003	Supplies a
Non-Recycled Items	156012	Building Finishes - Non-Recycled	660003	Supplies a
Non-Recycled Items	156013	Carpet - Non-Recycled	660003	Supplies a
Non-Recycled Items	156014	Erosion Control Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156015	Pavement Surfacing - Non-Recycled	660003	Supplies a
Non-Recycled Items	156016	Printing & Writing Paper - Non-Recycled	660003	Supplies a
Non-Recycled Items	156017	Soil Amendments & Soil Toppings - Non-Recycled	660003	Supplies a
Non-Recycled Items	156018	Textiles - Non-Recycled	660003	Supplies a
Fuel	157001	Diesel	605002	Gas
Fuel	157002	Gasoline	605002	Gas
Fuel	157003	Dyed Diesel	605002	Gas
Hospitality	158001	Catering Services	660922	Hospitalit
Hospitality	158002	Hospitality Space Rental	660922	Hospitalit
Hospitality	158003	Food and Beverage (Non-Taxable)	660922	Hospitalit
Hospitality	158004	Food and Beverage (Taxable)	660922	Hospitalit
Recycled Items	159001	Antifreeze - Recycled	660003	Supplies a
Recycled Items	159002	Mulch/Compost - Recycled	660003	Supplies a
Recycled Items	159003	Glass Products - Recycled	660003	Supplies a
Recycled Items	159004	Lubricating Oils - Recycled	660003	Supplies a
Recycled Items	159005	Paint - Recycled	660003	Supplies a

Recycled Items	159006	Paper - Recycled	660003	Supplies a
Recycled Items	159007	Plastic - Recycled	660003	Supplies a
Recycled Items	159008	Metals - Recycled	660003	Supplies a
Recycled Items	159009	Tire Derived Products - Recycled	660003	Supplies a
Recycled Items	159010	Tires Larger 15in - Recycled	660003	Supplies a
Recycled Items	159011	Tires Smaller 15in - Recycled	660003	Supplies a
Recycled Items	159012	Building Finishes - Recycled	660003	Supplies a
Recycled Items	159013	Carpet - Recycled	660003	Supplies a
Recycled Items	159014	Erosion Control Products - Recycled	660003	Supplies a
COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT
Recycled Items	159016	Printing & Writing Paper - Recycled	660003	Supplies a
Recycled Items	159017	Soil Amendments & Soil Toppings - Recycled	660003	Supplies a
Recycled Items	159018	Textiles - Recycled	660003	Supplies a
Services	160001	General Services	660003	Supplies a
Services	160002	Legal Services	613803	Legal Serv
Services	160004	Printing Services	660002	Printing
Services	160005	Advertising/Promotional/Media Services	660017	Advertisin
Services	160006	Bus Charter Services	606001	Travel-In
Services	160007	HazMat/Chemical Services	605006	Hazardou
Services	160008	Professional Services	613001	Contractu
Services	160009	Safety/Security Services	660003	Supplies a
Services	160011	State Fire Marshal Services	617002	Services f
Services	160012	Employee Recruitment Services	660042	Recruitme
Services	160013	Auxiliary Organization Services	660003	Supplies a
Supplies	170001	Lab/Scientific Supplies	660910	Laborator
Supplies	170002	Medical Supplies	660003	Supplies a
Supplies	170003	General Supplies	660003	Supplies a
Supplies	170005	Advertising/Promotional Supplies	660017	Advertisin
Supplies	170006	HazMat/Chemical Supplies	605006	Hazardou
Supplies	170007	Safety/Security Supplies	660003	Supplies a
For Library Use Only	180001	Bookbinding (Library Only)	660003	Supplies a
For Library Use Only	180002	Library Books (Library Only)	608001	Library Bo
For Library Use Only	180003	Library Serials (Library Only)	608001	Library Bo
For Library Use Only	180004	Library Periodicals (Library Only)	608001	Library Bo
For Library Use Only	180005	Library Subscriptions (Library Only)	608005	Library Su
Direct Purchase	700002	Attorney Fee	660019	Litigation
Direct Purchase	700003	Freight/Postage/Shipping	660001	Postage a
Direct Purchase	700004	Legal Settlement	660090	Expenses
Direct Purchase	700005	Local/Federal Gov. Payment	660090	Expenses
Direct Purchase	700006	Medical Service Payment	660003	Supplies a
Direct Purchase	700007	Memberships	660816	Dues and
COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT
Direct Purchase	700009	Official/Referee Payment	613001	Contractu

Direct Purchase	700010	Permits/Licenses (non IT)	660003	Supplies a
Direct Purchase	700011	Credit Card Bank Payment	107003	Expense A
Direct Purchase	700012	Royalty Payment	660003	Supplies a
Direct Purchase	700013	Utilities - Electricity	605001	Electricity
Direct Purchase	700014	Utilities - Gas	605002	Gas
Direct Purchase	700015	Utilities - Oil	605003	Oil
Direct Purchase	700016	Utilities - Water	605004	Water
Direct Purchase	700017	Utilities - Sewage	605005	Sewage
Direct Purchase	700019	Utilities - Telecommunication	604001	Telephon
Direct Purchase	700020	Direct Pay Other	660090	Expenses
Direct Purchase	700021	Student Union Return of Surplus	660045	Student U

2-LIST OF ACCOUNT CODES

ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION
604001	Telephone Usage	616004	I/T Infrastructure	660047	C
604090	Other Communications	616005	Misc Info Tech Costs	660049	In
604808	Mobile Phone Charges	616101	Interagency I/T Software	660061	Bu
604809	IT Voice & Data Charges	616801	I/T Hardware Maintenance	660064	Re
605001	Electricity	616803	I/T Hardware Other	660066	Ca
605002	Gas	617001	Services fr Oth Funds/Agencies	660089	Of
605003	Oil	617002	Services fr State Fire Marshal	660090	Ex
605004	Water	617090	Services from Auxiliary Org	660091	De
605005	Sewage	617101	Service frm bet. Campuses & CO	660095	De
605006	Hazardous Waste	617103	Services fr Office Fire Safety	660096	De
605800	Non-Hazardous Waste	617800	Accounting Service Charges	660105	In
606001	Travel-Domestic, In California	617801	Fingerprinting	660804	At
ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION
606002	Travel-Domestic, Out of State	619001	Other Equipment	660807	W
606803	Travel - International	619800	Instructional Equip Misc	660810	Pr
607002	Real Estate Acquisition	619803	Equipment Other	660811	Fu
607008	Service Districts Assessments	619804	Furniture	660812	Cr
607009	Group II Equipment - Cap Projt	620001	SP-Subrecipient - 25K & Under	660813	Gr
607010	Lease Purchase	620002	SP-Subrecipient - Over 25K	660815	Ex
607022	Capital Design	622001	SP-Participant Support -w/F&A	660816	De
607026	Capital-Working Drawings (W)	622002	SP-Participant Support -No F&A	660820	Te
607031	Capital-Construction Contract	622801	SP-Research Incentives-w/F&A	660821	Pa
607032	Construction Management	623001	SP-Materials, Suppl & Services	660822	Ec
607033	Construction Other	623801	SP-Laboratory/Resrch Supplies	660830	Sp

607037	Capital-Insurance Premiums	624001	SP-Scholarships-w/F&A	660833	M
607043	Capital - Pollution Remed Exp	624002	SP-Scholarships-NO/F&A	660834	Ac
608001	Library Books (Lbry use only)	624801	SP-Scholarships-Tuition w/ F&A	660835	Le
608005	Library Subscriptions	624803	SP-Scholarships-Tuition NO F&A	660837	At
609001	State E.O.P. Grant Program	624804	SP-Scholarships-Books NO F&A	660838	St
609002	State University Grant	660001	Postage and Freight	660839	Sp
609003	State Grants-Other	660002	Printing	660840	Gr
609004	State Graduate Fellowship	660003	Supplies and Services	660887	Pr
609005	Other Student Scholar/Grants	660004	Interfund Interest Expense	660902	Ot
609007	Scholarships/Grants - Private	660005	Interest Expense-Finance Lease	660910	La
609008	Scholarships/Grants - Institut	660006	Interest on Bonds and Notes	660919	Ta
609009	Fin Aid - CSU Educ Doctorate	660007	Principle on Bonds and Notes	660922	He
609010	DPT Financial Aid-Non SUG	660008	Interest Charges-Others	660923	Cr
609011	DNP Financial Aid Non-SUG	660009	Professional Development	660927	In
609013	Summer Enrollment Grant FA Exp	660010	Insurance Expense	660930	Co
ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DI
609099	Scholarship Allow Tuition Disc	660014	State Service Charges for SRB	660937	Ve
609800	Student Grants Awarded	660016	Property Insurance Premium Exp	660940	Co
610001	Federal Financial Aid	660017	Advertising & Promotion	660942	Pa
610002	Federal Fin Aid Loan Disb	660019	Litigation Cost	660955	Fo
612001	State Pro Rata Charges-Admin	660024	Overhead - Other	660981	Im
613001	Contractual Services	660025	Overhead-Chancellor's Office	660982	De
613800	Consulting Contract Services	660027	Pollution Remed Exp (non-cap)	660983	Co
613801	Non-Credit Instructr Pay (001)	660040	Bad Debt Expense	660987	Bi
613802	UCES-Field Trips-Test (001)	660041	Space Rental	660989	Fe
613803	Legal Services	660042	Recruitment	662001	F&
613804	Audit Services	660043	Accreditation Expense	662003	Pr
616001	I/T Communications	660044	Loan Cancellation and Defaults	662004	Pr
616002	I/T Hardware	660045	Student Union Return Surplus	662801	F&
616003	I/T Software	660046	Wells Fargo Bank Charges	662802	F&
				662803	F&

3-CSUBUY FIELDS TO CFS DATA WAREHOUSE FIELDS

Most fields in CFS Data Warehouse are populated by CSUBUY. As shown Doc ID in Data Warehouse is Voucher # in CSUBUY. Doc Ln Descr in Data Warehouse is Item in CSUBUY.

Business Unit	Fiscal	Period	Accounting Date	Doc ID	Doc Src Fdescr	Doc Ln Descr	Amount
LBCMP - CA State University	2025	7	01/23/2026	C0140855	VCH - AP Voucher Accounting	FB NITRILE GLV PF LF L 100/PK	8.34
LBCMP - CA State University	2025	7	01/24/2026	C0140789	VCH - AP Voucher Accounting	FGO Organic Jasmine Green Tea	16.40

Purchase Order	Supplier ID	Supplier Name	Invoice ID	Jrnl ID	Jrnl Descr	CSU Descr	CSU Ref 1	CSU Ref 2	Ledger Fdescr
2400072409	0003825401	FISHERSCIE-001	6264644Y	AP02682181	-	JAG	-	-	ACTUALS - Actuals
2400072402	0000126526	AMAZONBUSI-001	1X9T-336T-NLYX	AP02682182	-	JAG	-	-	ACTUALS - Actuals

From CSUBUY:

Fisher Scientific Company LLC · 1 Item · 7.55 USD

^ SUPPLIER DETAILS CA State University Long Beach (LBXMP-3) : 6722 Bickmore Avenue, Chino, California 91708 United States

Contract *no value* Supplier Account No. *no value*

Quote number *no value* PO Clauses *no clause*

Need to make changes? [VIEW ITEMS](#) Item(s) was retrieved on: 1/22/2026 4:18:17 PM

- FB NITRILE GLV PF LF L 100/PK

Line	Status	Item	Catalog No.	Size/Packaging
1	✓	FB NITRILE GLV PF LF L 100/PK	191301597D	PK

Voucher · Fisher Scientific Company LLC · C0140855

Summary Tax Details Matching Supplier Messages Comments 10

General Information

Invoice Details

Supplier Name Fisher Scientific Company LLC

Supplier No. 0003825401

Additional Information

Remit To

PO Box 50129
Los Angeles, California 90074-0129

United States
Address Id 5

4-AMAZON ACCOUNTS AND ACCESS

To access Amazon Business and start shopping through CSUBUY, create or convert your Amazon account.

Amazon PunchOut

The CSU has a central Amazon Business account. To shop in CSU's Amazon Business account properly, you must understand how it is set up.

- Every user will have their own unique Amazon Business profile, which is tied to an email address.
- Email addresses can only be used once across any Amazon account.
- Punching out to the Amazon Business account from CSUBUY lands you into the correct shopping group.
- The email address used for CSUBUY purchases on Amazon will be the one listed in your CSUBUY user profile.

RECOMMENDATION: BEFORE punching out from CSUBUY to Amazon, check your existing Amazon account to see what email address is used (log in directly to Amazon without punching out from CSUBUY).

If you did not check beforehand, that is OK, it is still possible to shop in Amazon through CSUBUY. The initial setup may be a little different. See below for additional details on each and how to properly get connected.

Scenarios

1. If you are already using CSU's Amazon Business account with this email address, you are all set! (Scenario 0)
2. Email address is new to Amazon (Scenario 1)
3. Email address is being used for an Amazon retail account
 - A. You want purchase history to merge (Scenario 2)
 - B. You want purchase history kept separate (Scenario 3)
4. Email address is being used for another Amazon Business account (Scenario 4)

If you are having difficulty accessing Amazon, it may be due to the email address and one of the scenarios listed above.

Scenario 0: Email Address is in the CSU Amazon Business account

You are already using CSU's Amazon Business account with this email address. This is most likely from using the CSU Pro-Card Marketplace. No additional setup is required in this scenario. Just click on the Amazon Business tile from CSUBUY to PunchOut to Amazon Business account and start shopping.

Scenario 1: Email Address is New to Amazon

If your email address is not used on any Amazon account, PunchOut and start shopping in Amazon Business:

1. Click on the Amazon Business tile in CSUBUY.
2. Amazon may start you with a registration wizard. If prompted, enter your first and last name.
3. Complete the registration process.
4. You will have an Amazon profile set up, and your email address will be tied to CSU's Amazon Business account.
5. Click "Start Shopping" to access Amazon Business.

Scenario 2: Email Address is Being Used for Retail Account (Want to Merge)

This scenario is for users who purchased items on a regular, individual Amazon retail account, which was not tied to any Amazon Business account. Purchases in this situation were not made through the CSU Pro-Card Marketplace or any other CSU-related account.

If you used Amazon for work purchases and have your work email as the main email address in your Amazon profile, the Amazon account will need to be changed to tie in with the CSU Amazon Business account. There are some options in this conversion process. This scenario lists how to merge your account. Merging will transfer all purchase history.

IMPORTANT: After merging, your individual retail account will no longer be active, and you will lose access to any subscriptions or Prime benefits that were tied to that account. You will use the same email to sign in to CSU's shared Amazon Business account.

WARNING: Merging transfers ALL purchase history – personal and work-related. If you made any personal purchases in the Amazon retail account, you may want to choose Scenario 3 below to separate out work vs. personal.

To merge an Amazon retail account with the CSU Amazon Business account:

1. Click on the Amazon Business tile in CSUBUY.
2. Sign into your existing Amazon account when prompted.
3. When asked, select "Yes, add to my organization's shared account".
4. Click "Next"
5. Click "Start Shopping" to access Amazon Business.

Result: Your Amazon account is now part the CSU's Amazon Business account.

Purchase history should have migrated over. To shop, always PunchOut from the tile in CSUBUY.

Scenario 3: Email Address is Being Used for Retail Account (Want to Keep Separate)

This scenario is like Scenario 2 above, but you want to keep it a separate and personal account.

This is for users who purchased items on a regular, individual Amazon retail account, which was not tied to any Amazon Business account. Purchases in this situation were not made through the CSU Pro-Card Marketplace or any other CSU-Related account.

If you used Amazon for work purchases and have your work email as the main email address in your Amazon profile, the Amazon account will need to be changed. This scenario lists how to keep the personal account separate.

RECOMMENDATION: BEFORE punching out from CSUBUY, log into Amazon and change the account email address.

*** Update the email address in your Amazon retail account to a non-CSU email to avoid additional conversion steps.**

*** If the email address is updated before starting, the CSU email is no longer being used on the personal account. The resulting initial CSUBUY PunchOut will be an easy setup using Scenario 1 above.**

If the email was not changed beforehand, then follow the steps below.

To separate an Amazon retail account to a non-CSU email address:

1. Click on the Amazon Business tile in CSUBUY.
2. Sign in to your existing Amazon account
3. Select "No, I want to keep this account personal"
4. Enter a DIFFERENT email address for your Amazon Business account. Use a personal, non-CSU email address that is not used on any Amazon account. A new email address may need to be created.
5. Verify the new email by entering the OTP (One Time Password) sent to that address.
6. Enter your full name and create a password for your new Amazon Business account
7. Click "Create your Business account"
8. Click "Start Shopping" to access Amazon Business.

Result: Your personal Amazon account remains separate with its order history and subscriptions intact. The personal account is tied to a personal email address. Your CSU email address is now tied to the CSU Amazon Business account.

Scenario 4: Email Address is Being Used for Another Amazon Business Account

Having a separate Amazon Business account is the most complex conversion scenario. This is a business account different than the central CSU Amazon Business account. There are several options and variables to consider.

- Is the other business account a single-user or multi-user?
- Is your email address in the other business account profile identified as an admin or non-admin?
- When converting, do you want purchase history in the other business account merged or not merged?

Setup may require deregistering your email from the other business account. You may need an invitation email sent.

RECOMMENDATION: Contact Amazon Business help line or account rep for assistance.

Registration Support: (844) 428-3060 or use this [LINK](#) to get a phone call from an agent on a pre-authenticated line.

CSU's account representative: Rachel Kaizoji, kaizoji@amazon.com

Also use [CSU-Amazon Business Resource Hub](#)

Tips, Tricks & FAQ

1. Pop up blocker – When punching out to Amazon Business the first time, it may appear that it is not connecting. Most likely it is your browser blocking a pop-up window. Since Amazon opens in a new browser window, you will need to set your browser to always allow pop-ups for Amazon.

2. When checking out for the first time in Amazon. It may require you to select your campus address. This is a placeholder address only, and it is not the final address where the product will be shipped. The final delivery address is the ship-to address listed on the CSUBUY requisition/purchase order.

3. When ready to checkout in Amazon, the button may say "Submit order for approval". Another place on the checkout page may say "This order requires approval." This is Amazon's way of saying "send the cart back to CSUBUY." Click the button to return the cart to CSUBUY.

Like all PunchOut suppliers, shopping is 2-step process:

- a. PunchOut to the supplier, shop and put items in the cart.
- b. Return the cart to CSUBUY then submit the requisition to place the final order.

4. PunchOut agreement – after returning the cart to CSUBUY, Amazon will hold the item inventory quantity and price. After 7 days, it may still go through, but there is no guarantee that the price will be the same or quantity available. There is risk that some or all the order will be cancelled. Process the order timely.

5. After returning the cart to CSUBUY, do not make changes. Do not add or delete lines. There is risk that some or all the order will be cancelled because the final order placed does not match the cart returned from Amazon. If you need to make changes, it is recommended to delete that cart and start over.

Remember: Before you start, check your cart (in CSUBUY).

6. Passwords set up in Amazon are not tied to SSO campus credentials. It is the password you set up directly with Amazon. Performing an action in the Amazon PunchOut other than shopping and checking out may require you to enter your password. This includes checking on order status or reviewing past purchases.

7. For Amazon purchases to process correctly, it is important to always PunchOut from the CSUBUY page. Punching out from CSUBUY to get into the correct Amazon purchasing/PunchOut group. If you see a warning that says that the order cannot be placed and must go through your eprocurement system, it is likely that you went directly to Amazon. Start with CSUBUY and click on the Amazon Business tile to PunchOut to Amazon. It will get you in the correct PunchOut Group “CSUBUY P2P PROD”.

8. To meet CSU’s strategic sourcing requirements, some items may be restricted or blocked from purchasing.

9. Like all orders in CSUBUY, purchases made through Amazon Business will be processed on a PO and will be billed by invoice, not on your procurement credit card.

Help & Resources

- **[CSU-Amazon Business Resource Hub](#)**

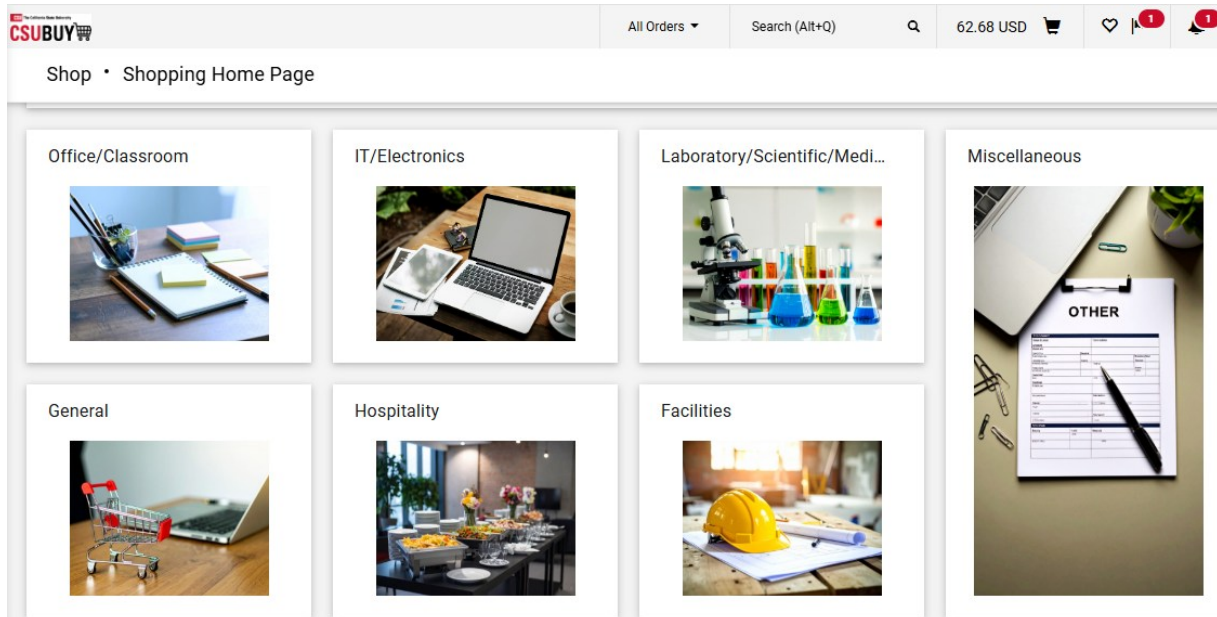
- Amazon Business help line: (844) 428-3060 or use this [LINK](#) to get a phone call from an agent on a pre-authenticated line.

- CSU’s Amazon account representative: Rachel Kaizoji, kaizoji@amazon.com

- Open a ticket using <https://csu.service-now.com/CSUBUY>

5-PUNCHOUT CATALOG GUIDANCE

The following is a list of PunchOut Catalogs in CSUBUY. You may locate these PunchOut Catalogs in the tiles of the Shopping Home Page.



We have been informed that the PunchOut Catalogs highlighted in yellow are not yet working. In addition, the PunchOut Catalog **Suppliers** highlighted in salmon are not available when using Forms.

NOT WORKING		
NO FORMS		
Office/Classroom	Laboratory/Scientific/Medical	Facilities
Staples	Carolina	Black Box Safety
School Specialty	Fisher Scientific	Lowe's
Complete Book	Henry Schein	Maxie
	Medline	Grainger
IT/Electronics	Thomas Scientific	Grainger
B&H	VWR	Graybar
CDWG	Millipore Sigma	Gordon Industrial
Dell		
Connection	General	
HP	Amazon	
IRG		
SHI		

Updates or changes to the above list are included in the Organization Message and General Announcement on the home page in CSUBUY. See below for examples. It is helpful to review this information each time you log in.

Organization Message

We are excited for **CSULB** to join the enhanced Procure-to-Pay (P2P) process in CSUBUY. Your Campus Team Members along with the CSUBUY Core Project Team have worked extremely hard to build and launch CSUBUY P2P for your campus. As you begin using the application, you may encounter areas that are not functioning as you expect. We ask for your patience and understanding during this time.

For CSUBUY P2P support, please attend the post launch office hours or weekly user labs which will provide the fastest opportunity for issue resolution and additional training opportunities.

- Post Launch Office Hours/Weekly User Labs Fridays through April 9:00 am to 11:00 am: <https://csulb.zoom.us/j/3711822019?omn=82833375611&from=addon>
- If you need assistance or support after training, you may also reach out to fishelpdesk@csulb.edu
- For training resources, training schedule, and general information, visit <https://www.csulb.edu/financial-management/procurement-services/csubuy-procure-to-pay-p2p>

Lastly, we have engaged with your Suppliers to get them registered and activated in CSUBUY with as up to date information as possible. However, some Suppliers may not have completed this process yet, and any additional encouragement you can offer will be extremely beneficial. If you do not see your supplier available, please help us by encouraging them to register through the previously provided invite, or request them through the Request New Supplier Quick Link on the CSUBUY home page.

Punchout that are unavailable due to integration issues: [CDWG](#), [Grainger](#), [Henry Schein](#), [IRG](#), [School Specialty](#)

General Announcements

CSUBUY GENERAL ANNOUNCEMENTS:

****PLEASE READ****: It has been identified, that after the Mar COMR (CFS update), there are intermittent issues related to integrating inactivation of existing or addition of new chartfields. It is anticipated that the solution will be in place within the next one to two weeks. Additional communication will occur once the solution is in place. Sorry for the inconvenience. Please submit a ticket if anything emergent, related to a new chartfield, arises during this timeframe.

NOTE: **CSUBUY Production will be unavailable from Friday, March 27 at 6:00 PM PT through Sunday, March 29 at 9:00 AM PT due to the JAGGAER 26.1 release.**

[3/16/26] **Lowe's** P2P ordering in **CSUBUY** is now enabled for all campuses.

[2/5/26] **CDWG's punchout** is only available to the original LIVE campuses for now. We are working with CDW to resolve the punchout issue with the Acceleration campuses.

6-IT PURCHASES GUIDANCE

When making IT related purchases in CSUBUY, you may make the purchase using a PunchOut Catalog or using a Form.

The chart below provides additional guidance on the commodity code, type of form and account code to use. Currently, one shopping cart can only contain one type of form. Even if the purchase is from the same supplier for IT hardware and IT software, please use different shopping carts since different forms must be used. IT maintenance associated with the IT hardware and IT software may be in the same Shopping Cart using the same Form but as separate items.

For example, when purchasing IT hardware such as a laptop and there is an IT hardware maintenance plan with the purchase, you would use the IT Hardware Form for both. One line item in the shopping cart would be for the laptop and a second line item in the shopping cart would be the maintenance plan. If you also have IT software, please create a new shopping cart for the IT software.

Folder	Commodity Code	Commodity Code Description	CSUBUY Form	Detailed Description	Account	Account Code Description
IT	115001	IT Accessories/Supplies	Goods & Services Form	Used for IT-related accessories and supplies, such as mouse, keyboard, cables, etc. when more detailed object codes (see 616001 to 616004) are not appropriate.	660940	Computer Supplies
IT	115002	IT Hardware	IT Hardware Form	Used to record expenditures for non-communication equipment, including laptops/desktops, printers, monitors, servers, etc., and related initial maintenance costs. If used for IT infrastructure, override to object code 616004.	616002	I/T Hardware
IT	115003	IT Hardware Maintenance	IT Hardware Form	Used to record on-going maintenance expenditures for non-communication equipment, including laptops/desktops, printers, monitors, servers, etc. If used for IT infrastructure, override to object code 616004.	616801	I/T Hardware Maintenance
IT	115004	IT Software	IT Software Form	To record expenditures for IT software or software as a service, including initial maintenance costs related to the use of the software.	616003	I/T Software
IT	115005	IT Software Maintenance	IT Software Form	To record on-going maintenance expenditures for IT software, related to the use of the software.	616003	I/T Software
IT	115006	Telecommunications Supplies	Goods & Services Form	Used to record costs for communications equipment, such as telephone equipment, routing equipment and network software. It may also include tax, initial maintenance and related training costs.	616001	I/T Communications
IT	115007	Telecommunications Services	Goods & Services Form	Used to record costs for communications services, and on-going maintenance and related training costs.	616001	I/T Communications
IT	115008	IT Professional Services	Independent Contractor Form	Payments for IT expenditures made pursuant to a formal agreement executed between the CSU and the provider of services. A formal agreement is used when detailed specifications are required, where there is a deviation from the CSU's standard contract provisions, where issues of risk need to be addressed and/or where services will be provided over an extended period of time. The value of any individual contract is generally significant (such as for a major project). Reimbursement of vendor travel costs, if a provision of the agreement, is also charged to this object code.	613001	Contractual Services
IT	115009	IT Consulting	Independent Contractor Form	Payments for IT expenditures made pursuant to a formal agreement executed between the CSU and the provider of services. A formal agreement is used when detailed specifications are required, where there is a deviation from the CSU's standard contract provisions, where issues of risk need to be addressed and/or where services will be provided over an extended period of time. The value of any individual contract is generally significant (such as for a major project). Reimbursement of vendor travel costs, if a provision of the agreement, is also charged to this object code.	613800	Consulting Contract Services

7-BLANKET PO GUIDE

A Blanket PO is a purchase order for the same goods and services used repeatedly over a set period of time. The purchase order remains open until either the total dollar amount on the purchase order has been fully vouchered or the PO Owner initiates the PO to be closed.

In CSUBUY, a Blanket PO must be entered by a Shopper/Requester (who is then the PO Owner). From the Shopping Home Page:

1. Select the appropriate Form for the goods and services.
2. In the General Information section enter:
 - a. Yes, for Blanket PO
 - b. Performance start and end dates for the PO.

← Procurement Request • Goods and Services Request

✓ Instructions ✓ Suppliers 3 Form Fields 4 Review And Submit

General Information

What type of goods or services are you requesting? ★

Is this a Blanket Order? ★ Yes No

Is the request for a renewal of a previous purchase? Yes No

Does the request include performance terms (start & end date)? ★ Yes No

Performance Start Date

Performance End Date

3. In Cost Details,
 - a. Unit Price – Enter the total PO amount
 - b. Quantity – Enter ONE
 - c. Unit of Measure – Enter LOT

✓ Instructions ✓ Suppliers 3 Form Fields 4 Review And Submit

General Information Other Goods & Services Cost Details

Services - Other Cost Details

Unit Price ★	<input type="text"/>	USD	Quantity ★	<input type="text"/>	Total	0.00 USD
Unit of Measure ★	<input type="text"/>					
Product Description ★	<input type="text"/>					

1000 characters remaining

- After completing the Form and clicking Proceed to Check, edit the PO Information section, and click the check box for Amount-Only/Blanket PO

PO Information ✎ ... ▾

Accounting *no value*

Date

PO Type *no value*

Amount-Only / ✓
Blanket PO

Multi-Year PO ✗

Reference ID *no value*

Do Not ✗
Distribute

- Enter the chartfield for the PO.
If you have multiple chartfields in which the charges will be split by percentage for every invoice, please add the additional chartfields and indicate the percentage split. If you enter amounts instead, please note that each invoice received will be split according to the percentage split of those amounts.

If you have more than one department that needs to be charged that is NOT BASED ON PERCENTAGE, please see the next section for instructions.

Multiple Chartfields (with invoice not split based on percentage) for a Blanket PO

If you have a blanket PO charged to different departments NOT based on a percentage split, below are the options.

- Create separate Blanket POs for each department.

This will allow the invoice to be charged against the department that needs to be charged. The supplier must invoice the correct department and PO. Note that one invoice cannot be for multiple departments or POs.

2. Create a Blanket PO with ONE chartfield. **(PREFERRED)**

If an invoice comes through that needs to be charged to multiple departments, the recommendation is to record a manual journal entry to reclass to the appropriate department. This is the best option for those who receive one invoice that should be charged to multiple departments.

Once the Blanket PO is set up, the supplier could then send an invoice through CSUBUY for the goods or service that would go against the Blanket PO. AP receives the invoice and creates a voucher. The PO owner would **Verify Receipt** in the voucher process indicating the goods or service was received. Then payment is made to the supplier.

8-RESOURCES

Please find below various resources to support this guide and other aspects of CSUBUY.

[Procurement Services – Procure-to-Pay](#)



[CSUBUY User Guide for End Users](#)

General Training Resources

The CSULB User Guide is for Shoppers, Requesters and DOA/Fiscal Approvers and has been developed based on trainings from other campuses and the test environment. Therefore, please keep in mind that screenshots of the system may not be exactly the same as the live environment. We welcome any feedback you could provide regarding material you would like included and adjustments needed to improve the [CSULB CSUBUY User Guide \(PDF\)](#). For feedback, please contact fishelp@csulb.edu.

Long Beach [Quick Reference Guides](#)


CSUBUY Documents > **Shopper-Requestor Role Quick Reference Guide**

All Documents

Name	Modified	Modified By
CSUBuy QRG - Add a New Line to a Change Request.pdf	January 30	John Balarosan
CSUBuy QRG - Basic and Advanced Searches.pdf	January 30	John Balarosan
CSUBuy QRG - Create a Receipt.pdf	January 30	John Balarosan
CSUBuy QRG - Forms.pdf	January 30	John Balarosan
CSUBuy QRG - How to Shop and Checkout.pdf	January 30	John Balarosan


[Chartfields: Commodity Codes & Account List](#)

Commodity Code Folder	Commodity Code	Commodity Code Description	Account Code	Account Code Description
Services	160002	Legal Services	613803	Legal Services
Services	160004	Printing Services	660002	Printing
Services	160005	Advertising/Promotional/Media Services	660017	Advertising & Promotion
Services	160006	Bus Charter Services	606001	Travel-In State
Services	160007	HazMat/Chemical Services	605006	Hazardous Waste
Services	160008	Professional Services	613001	Contractual Services
Services	160009	Safety/Security Services	660003	Supplies and Services
Services	160011	State Fire Marshal Services	617002	Services fr State Fire Marshal
Services	160012	Employee Recruitment Services	660042	Recruitment


[DOA and Signature Levels Search](#)



CMS Financial Services Community

Signature Levels and Delegation of Authority (DOA) Search

Select by Division

- Select all
- AA-AP
- AA-ARSP
- AA-ATS
- AA-CED
- AA-CHHS
- AA-CIE
- AA-CLA
- AA-CNSM

Select by ASM

- Select all
- Candy Nguyen
- Carrie Hernandez
- Chanel Patrick
- Claudia Plaza
- Crystal Trocadero
- DeeDee Green
- Dominique Dupuy
- Elyana Campos

Search by Business Unit

- Select all
- LB49R
- LBCMP
- LBFDFN

ChartField (CF)

- Select all
- DEPT
- FUND

Select CF Value

- Select all
- 00001
- 00002
- 00003
- 00004
- 00005
- 00006
- 00007
- 00008

Select by ChartField (CF) Name

- Select all
- MA Dance
- MS in Info Syst
- 100 Women Strong
- 100+ Women Strong Scholarship
- 2016-17 SRB Cap Outlay Taxable
- 2019-20 SRB Cap Outlay Tax Ex
- 2019B SRB Cap Outlay Taxable
- 2020B SRB Cap Outlay Taxable

Function ID

- Select all
- CSUBUY
- OTHER

Approver Level

- Select all
- 1
- 2
- 3
- 4
- 5

Select by Approver Name

- Select all
- Abbey,Alyssa
- Achola,Edwin
- Agbay,Drew
- Aguliar,David
- Ahland,Michael
- Ahmed,Aftab
- Ahmed,Shariq
- Ahrar,Sivavash

Keyword Filter by keyword

Note: LBFDFN funds beginning with G, C, and RS are assigned to Office of Research & Economic Development (ORED). Hold down the "Shift" and "Ctrl" keys together to sort multiple columns.

Division	College Name	ASM	Bus Unit	ChartField	CF Value	ChartField (CF) Name	Function ID	Level	Approver Name	Count
DSA	Enrollment Services	Candy Nguyen	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	1	Apel,Scott	1
DSA	Enrollment Services	Candy Nguyen	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	1	Jones,Andrew	1
DSA	Enrollment Services	Candy Nguyen	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	2	Lesen,Beth	1
DSA	Enrollment Services	Candy Nguyen	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	3	Green,Donna	1
DSA	Enrollment Services	Candy Nguyen	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	3	Plaza,Claudia	1
DSA	Enrollment Services	Candy Nauven	LBCMP	DEPT	00132	Univ Outrch and Schl Reltns	CSUBUY	3	Shaffer,Tim	1

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AI-Empowered CSU

Basic Needs Initiative Conference

Cal State Apply Project

Cal State Online

Common Human Resources System (CHRS)

Common Management Systems (CMS)

Common Network Initiative

CSUBUY

Sourcing

Contracts

Marketplace

Spend Analytics

Procure-to-Pay

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Search

Find documents entering a keyword in the search box below.

Sort

Find documents by filtering by categories below.

Title	Category	Year	Module	User Group	Keywords
Accounts Payable Processing	QRG	2026-01	Procure-to-Pay	Accounts Payable	
Add a New Line to a Change Request	QRG	2025-03	Procure-to-Pay	All Users	Purchase Orders,Requisitions

REVISION CONTROL

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