



CSULB CSUBUY USER GUIDE FOR END USERS

(FOR SHOPPER, REQUESTER, AND DOA/FISCAL APPROVER)

CONTENTS

Table of Contents	1
Intro: Introduction	3
1-What is CSUBUY?	3
2-Who uses CSUBUY?.....	3
3-How to Access CSUBUY.....	4
4-Workflow: Lifecycle of a Purchase	4
5-CFS and CSUBUY	6
Chapter 1: Profile setup – Personal, Defaults, and Notifications	6
1-Persona	6
2-Ship To and Bill To Address Default Set Up	9
3-Cart Assignees.....	10
4-Account Code Defaults & Favorites	12
5-Setting Up Notification Preferences	18
Chapter 2: Shopper/Requester	21
1-Shopping Home Page Navigation	21
2-Before Shopping: Verify Persona and Empty Shopping Cart	23
3-Product Search.....	25
4-Adding Items to a Shopping Cart: Using PunchOut Catalogs.....	28
5-Adding Items to a Shopping Cart: Using Forms	30
6-Additional Forms.....	35
7-Shopping Cart Fields & Shopping Cart Management	37
8-Proceed to Checkout & DRAFT Requisition Overview	41
9-DRAFT Requisition: Chartfields	46
10-Assign Cart & Submit Request	48
11-Requisition Workflow	50
12-Commodity Codes & Compliance Review/Create a Receipt	52
13-Verify Receipt or Create Receipt.....	52

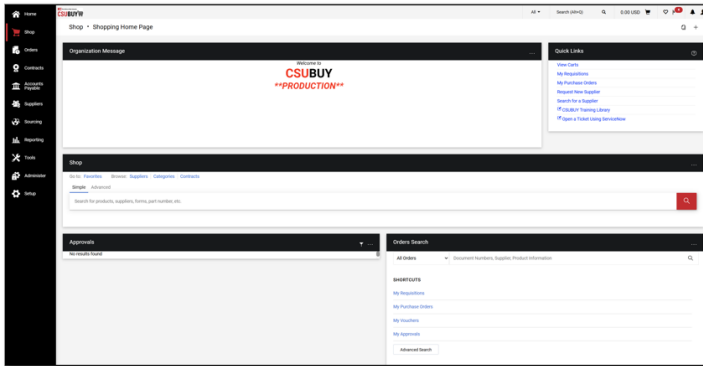
14-Suppliers	59
15-History and Resolving Returned Requisition	64
Chapter 3: Making Changes By Shopper/Requester.....	65
1-Shopping Cart (Draft Requisition) Changes	65
2-Changing Personas in a Shopping Cart	71
3-Change Request for Chartfield and Items on the PO.....	73
4-Adding and Removing a Line on a PO	80
5-Withdraw a Requisition	87
Chapter 4: FISCAL/DOA Approver	88
1-Approval Workflow for Requisition	88
2-Locate Requisitions and Assign for Your Approval	88
3-Reviewing a Requisition for Approval.....	93
4-Approver Action.....	97
5-Filtering My Approvals on Home Page	104
Chapter 5: Order Searches.....	107
1-Order Searches	107
2-Filtering Order Searches	111
3-Customizing Search Results	115
4-Saving Searches.....	118
5-Exporting Search Results to a Report	121
Chapter 6: Other Topics & References	124
1-List of Commodity Codes to Account Codes.....	124
2-List of Account Codes.....	128
3-CSUBUY Fields to CFS Data Warehouse Fields.....	130

INTRO: INTRODUCTION

1-WHAT IS CSUBUY?

CSUBUY is a system for purchasing and 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.

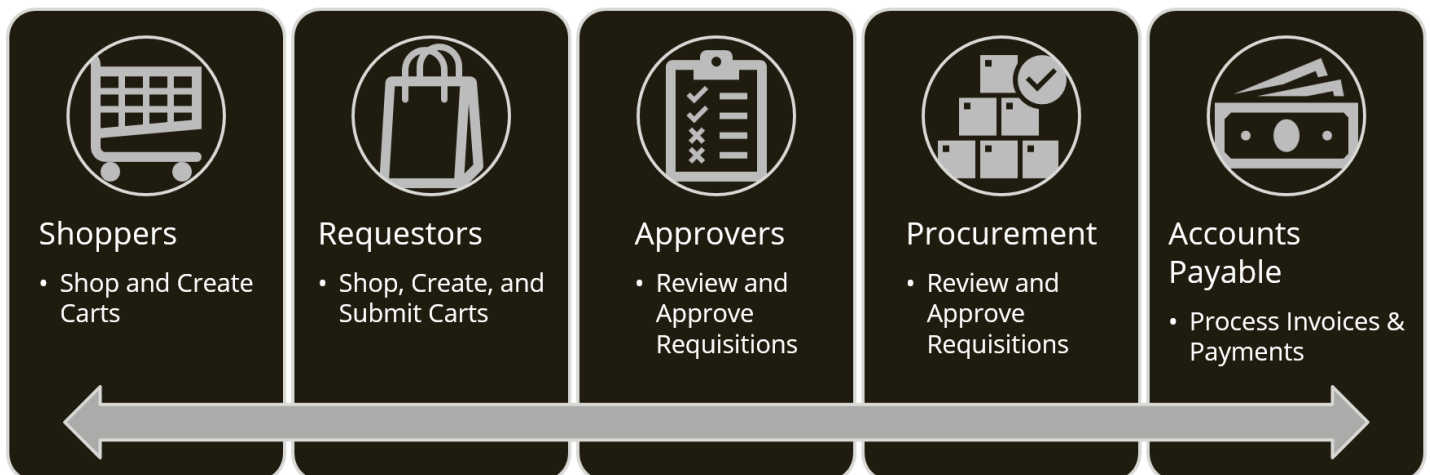


In simple terms, we aim to make things easier, more efficient, and standardized.

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.

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

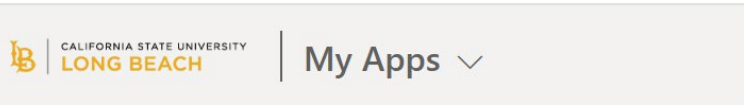
- Can shop for goods and services **and** submit requisitions for approval.
- Reviews and edits carts received from Shoppers.
- Responsible for entering chartfields, verifying funding, and ensuring compliance.
- Acts as the main point of contact for procurement processing.

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 management and/or your ASM. After receiving appropriate approvals, the CMS Team would then provide access.

You could log in by going to CSULB Apps:



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

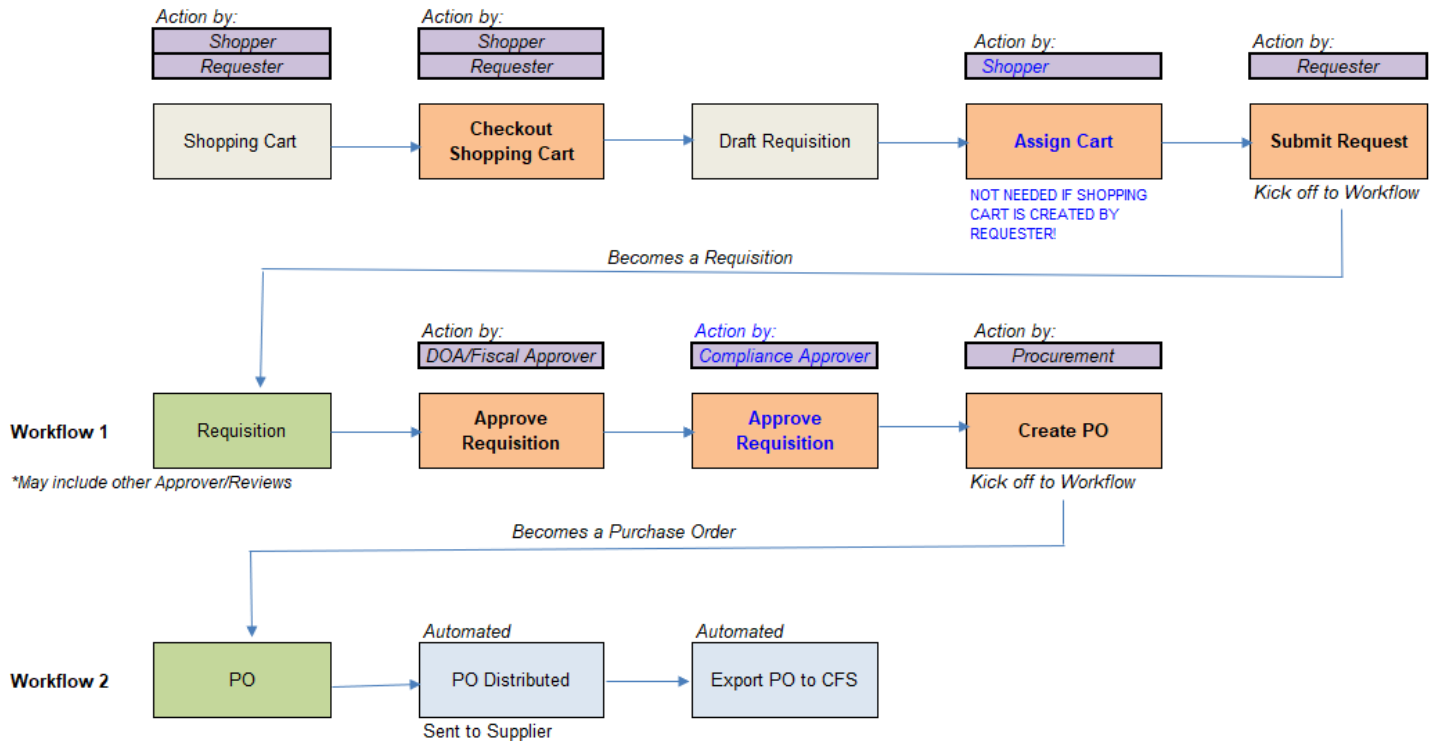


4-WORKFLOW: LIFECYCLE OF A PURCHASE

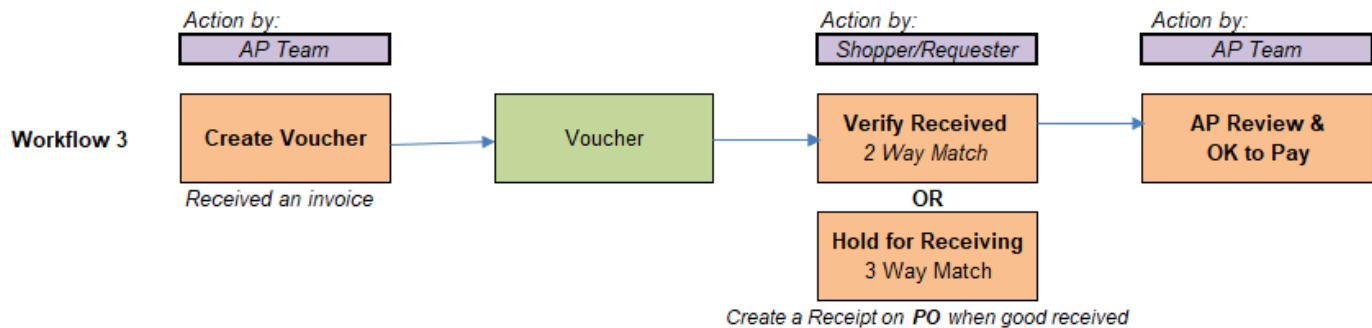
Once the Shopping Cart is submitted to Workflow by the Requester, the Shopping Cart becomes a Requisition and goes through approvals to become a PO. All three workflows are visible in CSUBUY.

Key:

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

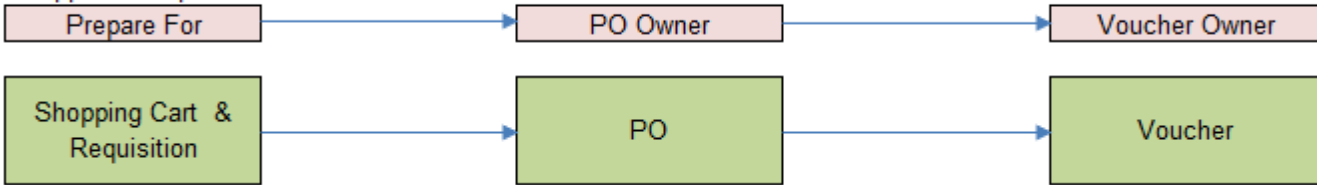


Finally, an invoice is received so that a voucher is created kicking off Workflow 3. Once verification of the receipt of goods or service has been completed, payment is made.

**ONE PERSON BUT MULTIPLE IDENTITIES**

The person who created the Shopping Cart, either the Shopper or Requester, is also known as the person indicated as Prepare For who then becomes the PO Owner and Voucher Owner. Important Note: The Prepare For person is responsible for verifying the receipt of the good or service.

Person who created the Shopping Cart
Shopper or Requester

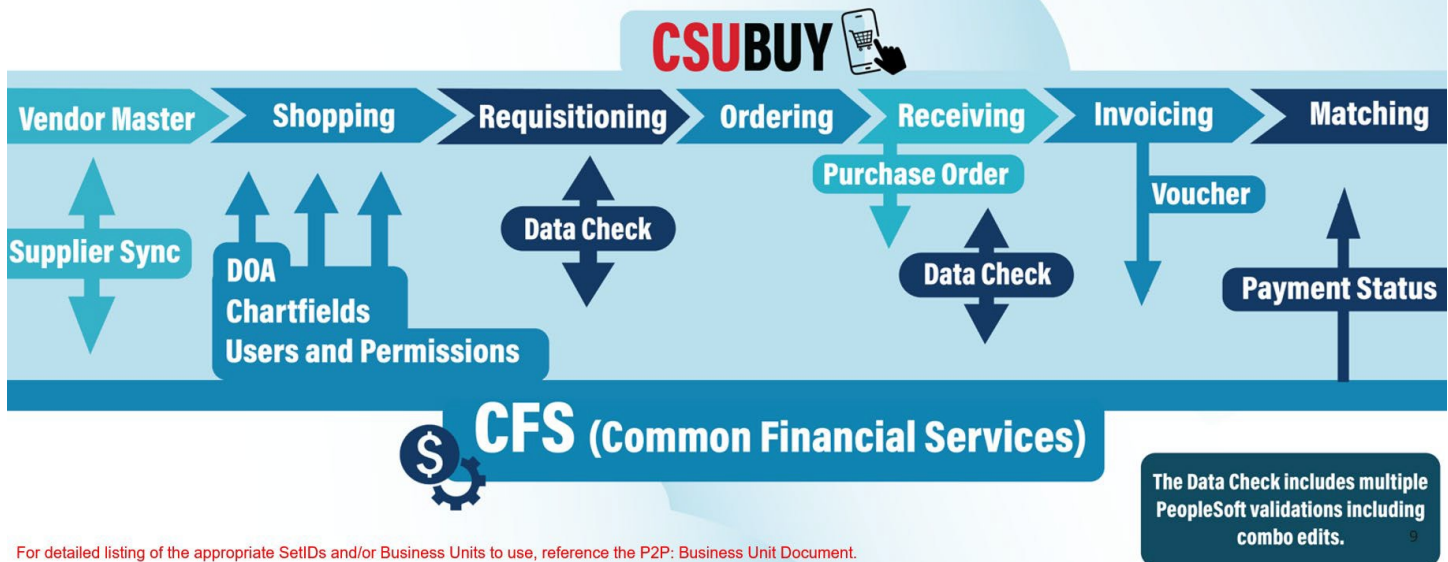


5-CFS AND CSUBUY

Some changes in process include the following:

1. Requisitions and Purchase Orders will no longer be made in CFS. Requisition do not carry over to CFS or Data Warehouse. However, CFS will still hold information on Purchase Orders.
2. Suppliers are set up in CSUBUY. However, CFS will hold information on Suppliers.

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
- LBXDN – CSULB Research Foundation

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

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

Sally Shopper
User Name sshopper

Assigned Shopping Personas

Personas

Personas
CalPoly Foundation (CalPoly Foundation)

Edit Persona

Name * CalPoly Foundation
Internal Name * CalPoly Foundation
Active ☒

Configuration Details
Business Unit Cal Poly Foundation P2P (SLXDN)
Save

- Personas allow users to shop from different business units
- Personas are assigned in CFS and passed to **CSUBUY** through an integration
- Not all users will have Assigned Shopping Personas

To navigate to this page simply click on your Profile Icon

Home Shop Orders Contracts Accounts Payable

Shop • Shopping Home Page

Organization Message

Welcome to the **CSUBUY**

Announcements
CSUBUY Global Enhancements
NEW Features as of 1/12/2026

Quick Links
[View Carts](#)
[My Requisitions](#)
[My Purchase Orders](#)

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

Search (Alt+Q) 200.00 USD

Minna Chang

- View My Profile
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page
- Change Shopping Persona
- My Pending Requisitions 2
- My Recently Completed Requisitions 22
- My Recently Completed Purchase Orders 22

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

Select a shopping persona from the list below

Default Profile

LBX49 - Long Beach State Foundation

LBXDN - CSULB Research Foundation

LBXMP - CA State University Long Beach

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

Search (Alt+Q) 200.00 USD

Minna Chang



View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

 **Change Shopping Persona**  (Shopping As: LBX49 - Long Beach State Foundation)

My Pending Requisitions 2

My Recently Completed Requisitions 22

My Recently Completed Purchase Orders 22

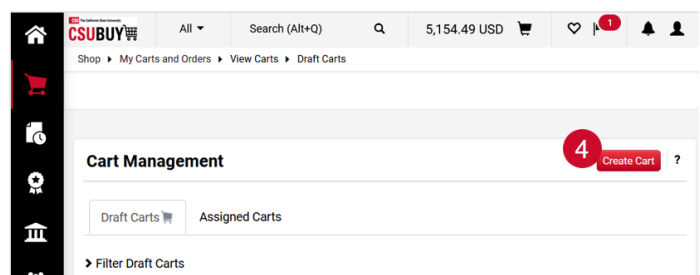
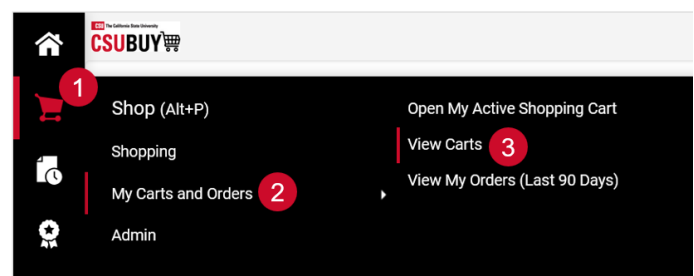
Important Note regarding Persona:

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:

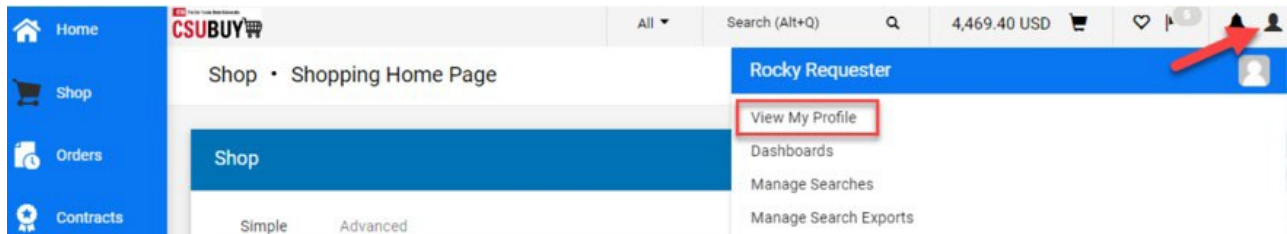
- Go to **Shop**.
- **My Carts and Orders**
- **View Carts**.
- Select **Create Cart** to start fresh.
 - Or **empty your current cart** before shopping.



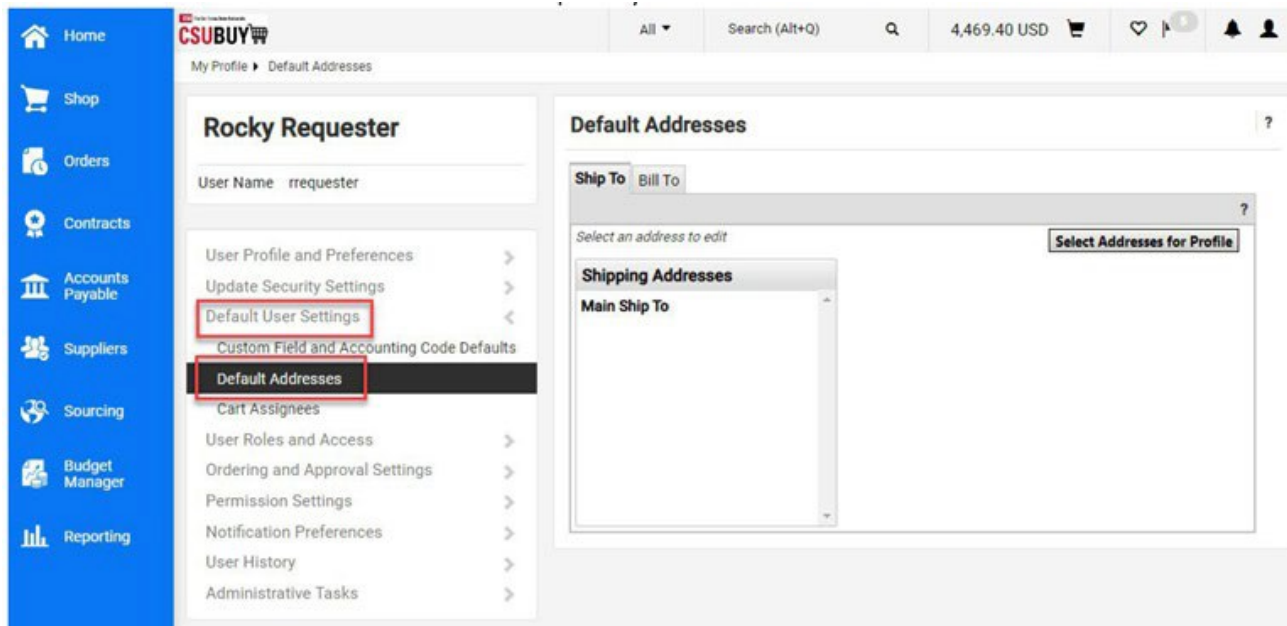
2-SHIP TO AND BILL TO ADDRESS DEFAULT SET UP

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

Shipping Addresses

CSU Long Beach - Receiving

Edit Selected Address

Nickname: CSU Long Beach - Receiving

Default: ☒ (highlighted with red arrow)

Current Default Address: CSU Long Beach - Receiving

ADDRESS

Attn: *★: Minna Chang

Contact Line 2: CSU Long Beach - Receiving

Address Line 1: 1331 Palo Verde Ave

City: Long Beach

State: CA

Zip Code: 90840-0005

Country: United States

Save (highlighted with red arrow)

Deliver To Location found in the Shopping Cart specifies 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 

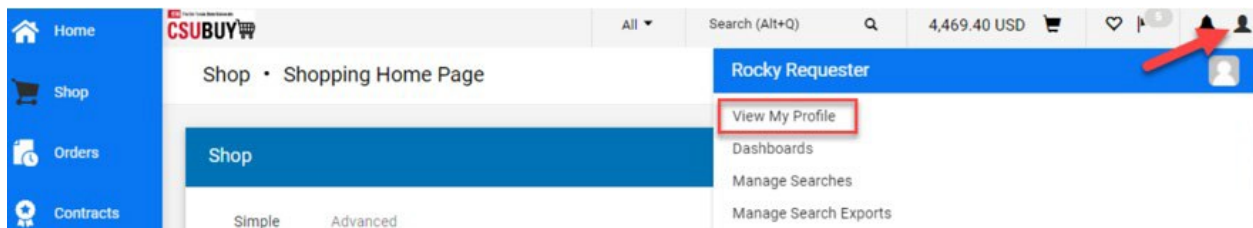
3-CART ASSIGNEES

A Shopper must assign their Shopping Cart to a Requester when they have completed shopping so that the Requester could 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 NameMinna

Last NameChang

Phone Number

Mobile Phone Number

E-mail Address ★minna.chang@csulb.edu

Business UnitLB - CA State University Long Beach P2P (LBXMP)

Authentication MethodSAML

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	<div>Set as PreferredRemove</div>
Mel(MaryEllen) Castillo	<div>Set as PreferredRemove</div>

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 ?

Approver

▼

Results Per Page

10 ▼

Search

4-ACCOUNT CODE DEFAULTS & FAVORITES

DO NOT SET UP CODE DEFAULTS AND FAVORITES AT THIS TIME. THERE IS A SYSTEM ISSUE.

When you have items in the Shopping Cart and then click Proceed to Check out, you are required to enter the Chartfield. (Note the Shopping Cart is now a DRAFT Requisition.)

[Home](#)
[Shop](#)
[Orders](#)
[Contracts](#)

CSUBUY

All Orders ▼

Search (Alt+Q)

200.00 USD

[Heart](#)
[Flag](#)
[Bell](#)
[User](#)

Shopping Cart • Shopping Cart

[Assign Cart](#)
[Proceed To Checkout](#)

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

Simple

Advanced

Summary

Details ▼

Snapshot of DRAFT Requisition: Chartfield Section

^

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	no value	00738_LBCMP Financial Management	115004 IT Software	616003_LBCMP I/T Software	no value	no value	no value	no value

By setting default or favorite Chartfield you use the most, the Chartfield section will be easier to

complete. You are also able to update the Chartfield in your Draft Requisition, if needed.

Defaults vs Favorites

Default auto populates fields. Favorites provides a drop-down list for quick selection

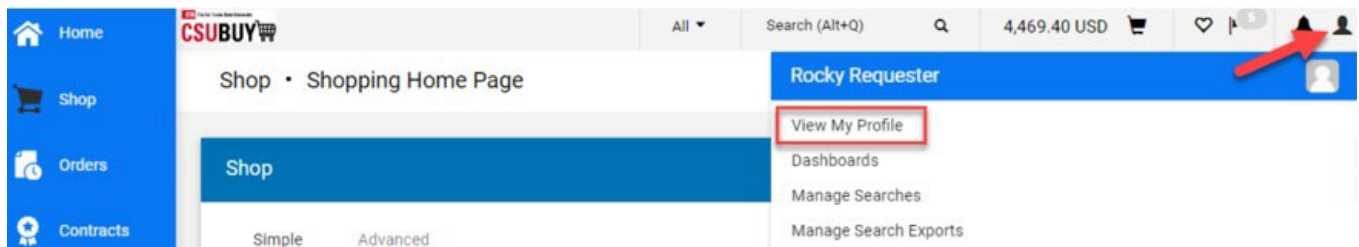
Defaults are preferred for users who consistently use the same Chartfield. Default will always populate regardless of the Business Unit/Persona you are shopping for. Therefore, we do not recommend setting Default Chartfield for those who shop for different Business Unit/Persona frequently.

Favorites are recommended for those who shop for different Business Units/Persona and/or uses various Chartfield.

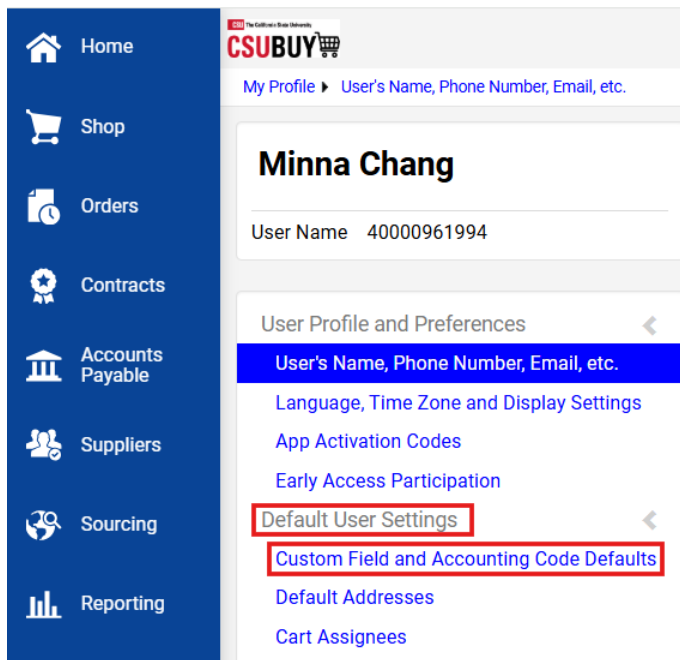
Setting Default Chartfield

To set a default Chartfield:

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: Custom Field and Accounting Code**.



3. Then go to the **Code** tab.
4. Click on **Edit** for the Field Names to set a default.

Custom Field and Accounting Code Defaults

Header (int.)	Codes	Code Favorites	Internal Information	Cart
Custom Field Name	Default Value	Description	Edit Values	
Business Unit	LBCMP	CA State University Long Beach	Edit	
└ Fund	No Default Value		Edit	
└ DeptID	No Default Value		Edit	
└ Account Override	No Default Value		Edit	
└ Program	No Default Value		Edit	
└ Class	No Default Value		Edit	

- Click on **Create New Value** if the value you need doesn't appear. You may use * as a wildcard.
- Enter the value and hit **Search**.

Custom Field and Accounting Code Defaults

Header (int.)	Codes	Code Favorites	Internal Information	Cart
---------------	--------------	----------------	----------------------	------

Custom Field Name	Default Value	Description	Edit Values
DeptID	No Default Value		Edit

Edit Values [Close](#)

Business Unit LBCMP ▾

Create New Value

Value	Description

Search For Value ?

Field Name DeptID

Value 00738

Description

Results Per Page 5 ▾

[Search](#)

7. Select the **check box** next to the Value you want and then click **Add Values**

Custom Field and Accounting Code Defaults

Header (int.) **Codes** Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
DeptID	No Default Value		Edit

Edit Values Close

Business Unit LBCMP

Create New Value

Value	Description
00738_LBCMP	Financial Management

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results Per Page 5

Values Found 1 Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	00738_LBCMP	Financial Management

Add Values Back To Search

8. Click on the Value you want and then the **Default checkbox**. Then click **Save**.

Custom Field and Accounting Code Defaults

Header (int.) **Codes** Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
DeptID	No Default Value		Edit

Edit Values Close

Business Unit LBCMP

Create New Value

Value	Description
00738_LBCMP	Financial Management

Edit Existing Value

Value 00738_LBCMP

Description Financial Management

Default ☒

Status active

Save Remove

- Then click **Close**.
- Repeat process for each Chartfield you want to add a default.

Setting Chartfield Favorites

Code Favorites are tied to a Business Unit/Persona. Therefore, if you select Business Unit LBCMP as shown below, you must be shopping in the LBCMP Persona for this Code Favorite Chartfield to appear on the Draft Requisition.

Minna Chang
User Name 40000961994

User Profile and Preferences >
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 >

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information Cart

Business Units: **LB - CA State University Long Beach P2P (LBCMP)**

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Chartfield

FM

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State University Long Beach	GF001_LBCMP CSU Operating Fund	00732_LBCMP CMS Financial Services	no value	no value	no value	no value	no value	no value

Be careful to **Add** your Chartfield in the section on TOP for your Chartfield to appear on a Draft Requisition and NOT under Code Favorites for Check Requests & Vouchers.

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information Cart

Business Units: **LB - Long Beach State Foundation P2P (LBX49)**

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Chartfield

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
no value	no value	no value	no value	no value	no value	no value	no value	no value

Code Favorites for Check Requests & Vouchers

Add

Chartfield

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
no value	no value	no value	no value	no value	no value	no value	no value	no value

When you Click on Add, you would then add a Nickname and enter the Chartfield string.

Chartfield ? X

Nickname ☐ Default

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP <small>Select from profile values... Select from all values...</small>	GF001_LBCMP <small>Select from profile values... Select from all values...</small>	00732_LBCMP <small>Select from profile values... Select from all values...</small>	no value	no value	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>

add split

Save Cancel

You may add additional Chartfield Code Favorites.

Repeat this process for other Business Units/Personas you shop for and would like a Chartfield Code Favorite.

Seeing your Chartfield Code Favorites in a Draft Requisition

When you Checkout the Shopping Cart, it becomes a Draft Requisition. You will then review the Chartfield and enter or adjust to the correct Chartfield by clicking on the pencil icon.

Requisition • 4406590

Summary Taxes/S&H PO Preview Comments Attachments History

SUPPLIER DETAILS Fulfillment Address 1

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	Thermal Printer Starter Kit	P1293-0930	1 EA	1,017.16	1 EA	1,017.16

ITEM DETAILS

Manufacturer Name	Eppendorf	Contract:	no value	Tax Code	LBC Long Beach Sales Tax
Manufacturer Part Number	P1293-0930	Commodity Code	170003 / General Supplies	Taxable	✓
More Information URL	https://www.eppendorf.com/us-en/...	Receiving Required	Yes	Asset	✗
MSDS URL	https://www.eppendorf.com/us-en/...	Contains Discount	✗	Asset Profile ID	no value
more info...		Prepayment	no value	Work Order	no value
		PO Clauses	no clause		

CHARTFIELD Values have been overridden for this line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
---------------	------	--------	--------------	---------	------------------	---------	-------	---------

Then the Chartfield box pops up:

Override Line 1: Chartfield X

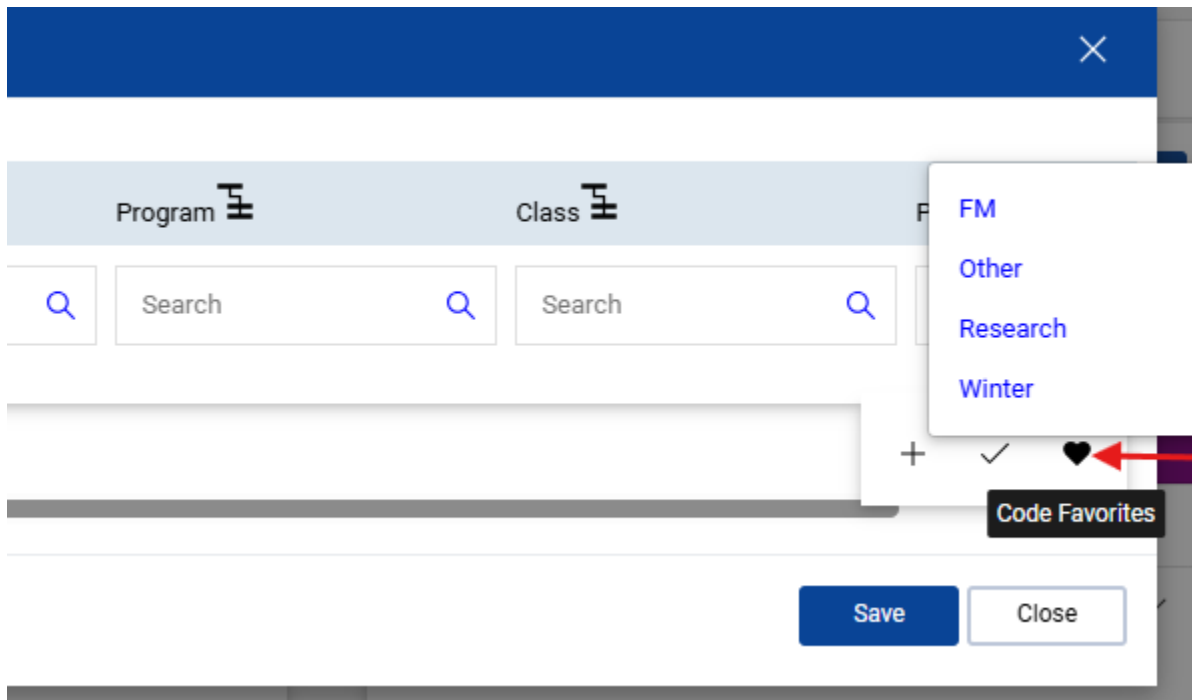
Business Unit ★	Fund ★	DeptID	Commodity CF ★	Account ★	Account Override	Program	Class	Project
LBCMP - CA State University Long Beach	GF001_LBCMP ✓	00732_LBCMP ✓	170003	660003_LBCMP	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>

★ Required fields

Save Close

When hovering over the box you will notice the box on the lower right with the plus, check and heart.

When you click on the heart, you will see the Nickname of your Code Favorites. Selecting the Nickname and the Chartfield will populate.



5-SETTING UP NOTIFICATION PREFERENCES

The recommendation is to keep the current default notifications EXCEPT for the Shopper/Requester should ensure Verify Receipt and Create a Receipt Notifications are ON.

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 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 the action is needed.

Select Notification Preferences>Accounts Payable. Then click on Edit Section.

Minna Chang

Jser 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

Notification Preferences: Accounts Payable

Voucher submitted into Workflow ?

None

Voucher Workflow Notification available ?

None

Voucher pending Workflow approval ?

None

Voucher Workflow complete ?

None

Voucher line item(s) rejected ?

Email & Notification

Voucher rejected ?

Email & Notification

Voucher returned ?

None

New Message - Payment ?

None

Edit Section

Select Override for Voucher Requires Receipt notice.

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

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

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 reminder notification ?

☐ Default

☐ Override

None

Email notification that the voucher requires a receipt

Save Changes

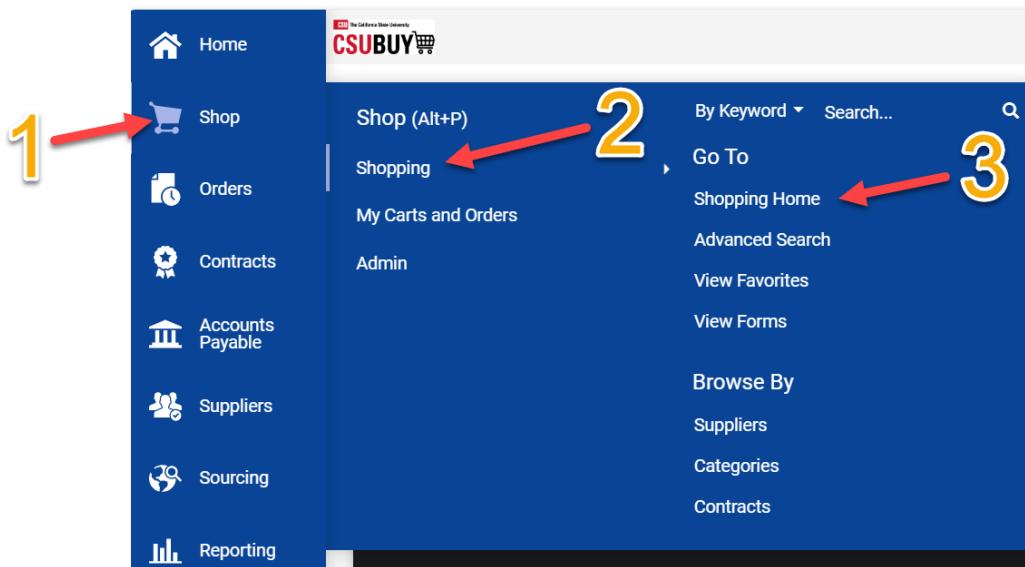
Cancel

CHAPTER 2: SHOPPER/REQUESTER

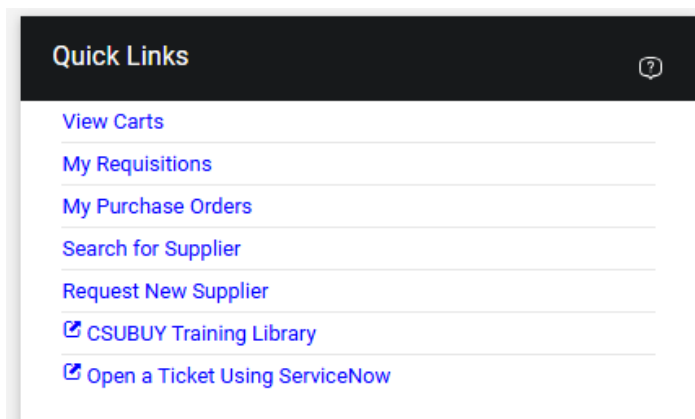
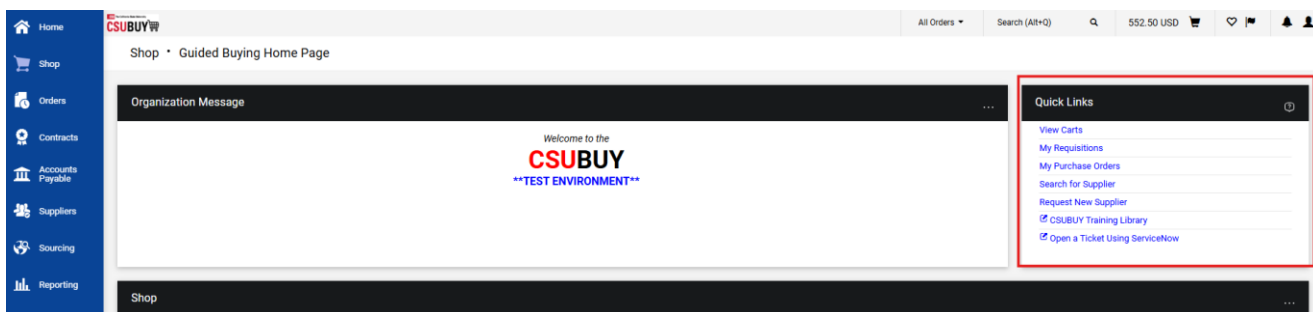
1-SHOPPING HOME PAGE NAVIGATION

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



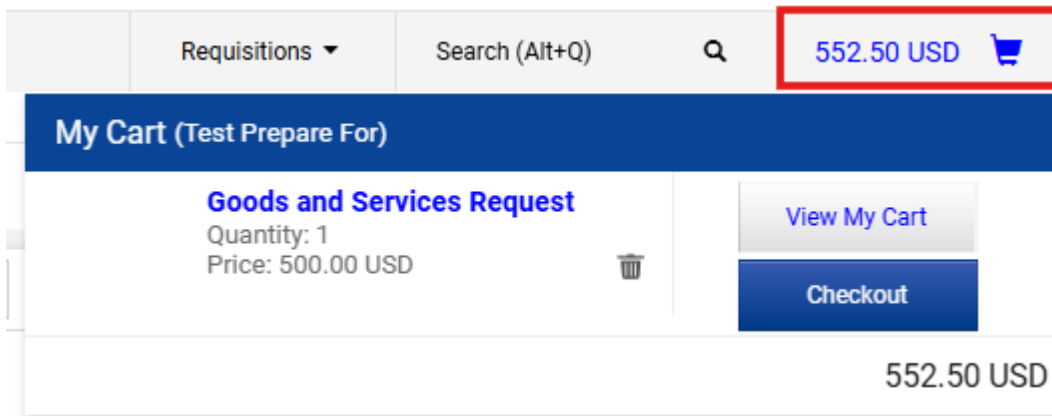
To the right, there is a Quick Links section. This provides links that could be described as “My Stuff” along with other useful links.



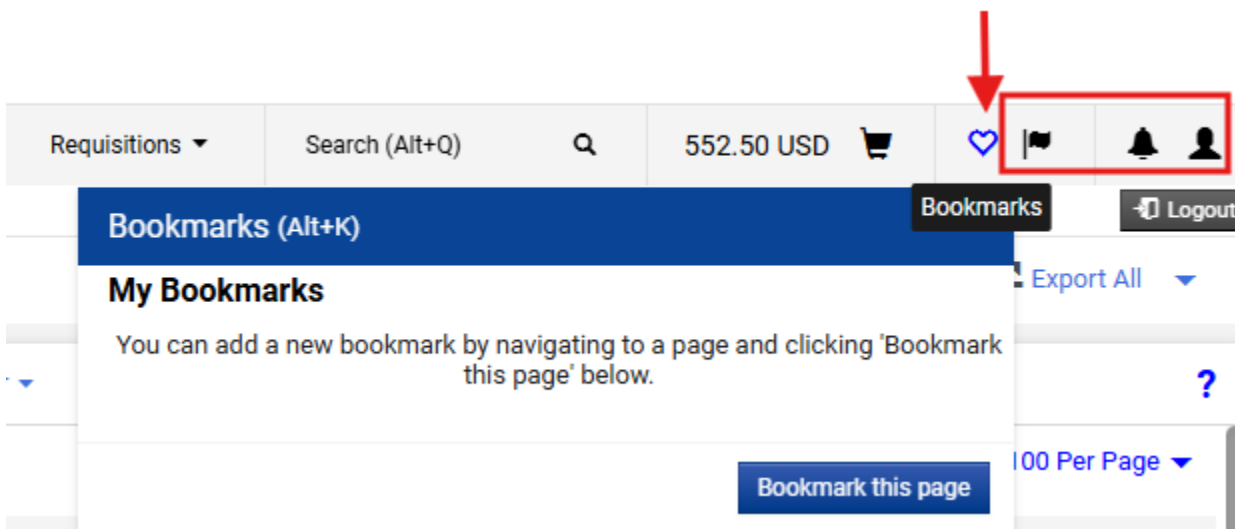
At the top right corner, you will notice the following icons and search bars. The drop down has selections similar to the flyouts. Select the type of document you are searching for and then enter a search criterion such as number, supplier, name, prepare for, etc.

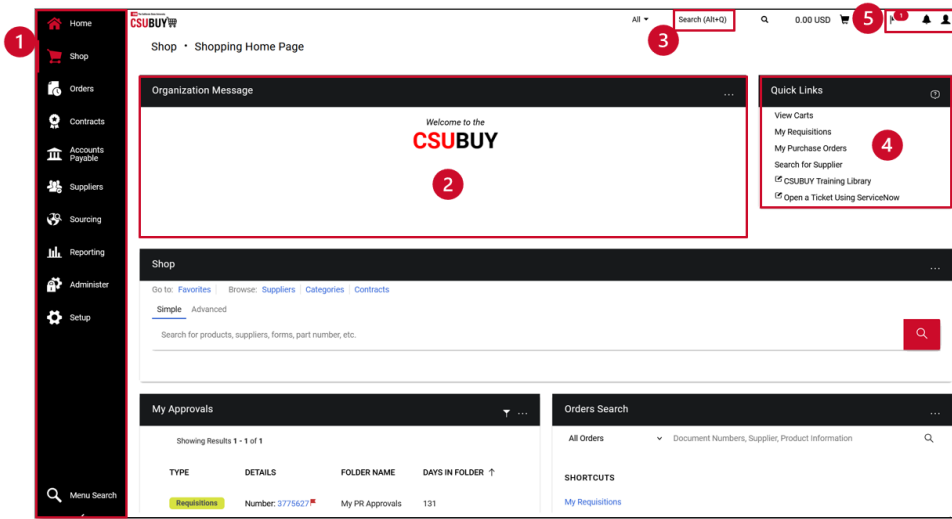


Shopping Cart icon: where you can view your Shopping Carts.



- **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

A Persona is similar to a Business Unit. Confirm that you are in the correct Persona for the entity you are shopping for.

Entity

Persona

CSULB Campus

LBXMP – CA State University Long Beach Persona

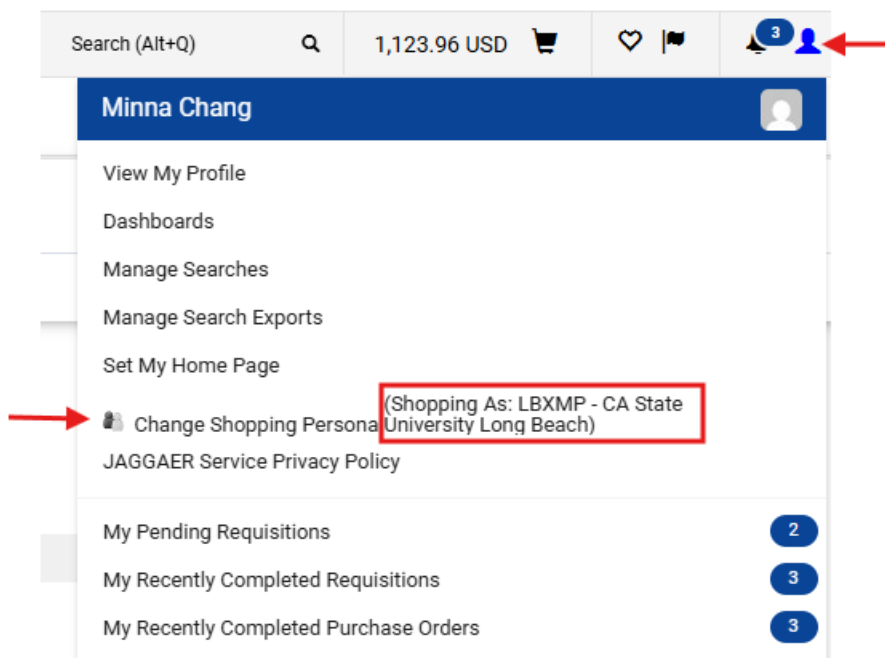
Research Foundation

LBXFD – CSULB Research Foundation

Long Beach State Foundation

LBX49 – Long Beach State Foundation

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



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

Change Shopping Persona

Select a shopping persona from the list below

☐ Default Profile

☐ LBX49 - Long Beach State Foundation

☐ LBXDN - CSULB Research Foundation

☒ LBXMP - CA State University Long Beach

Close

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**.

This amount shows the shopping cart has items in it. An empty shopping cart would have 0.00 USD

12,597.00 USD

1

View My Cart

2

3

...

Assign Cart

Proceed To Checkout

View Carts

4

View Cart history

CSUBUY

All Search (Alt+Q)

0.00 USD

Logout

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	2025-10-24 40000300731 01		10/24/2025	0.00 USD	View

5

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.

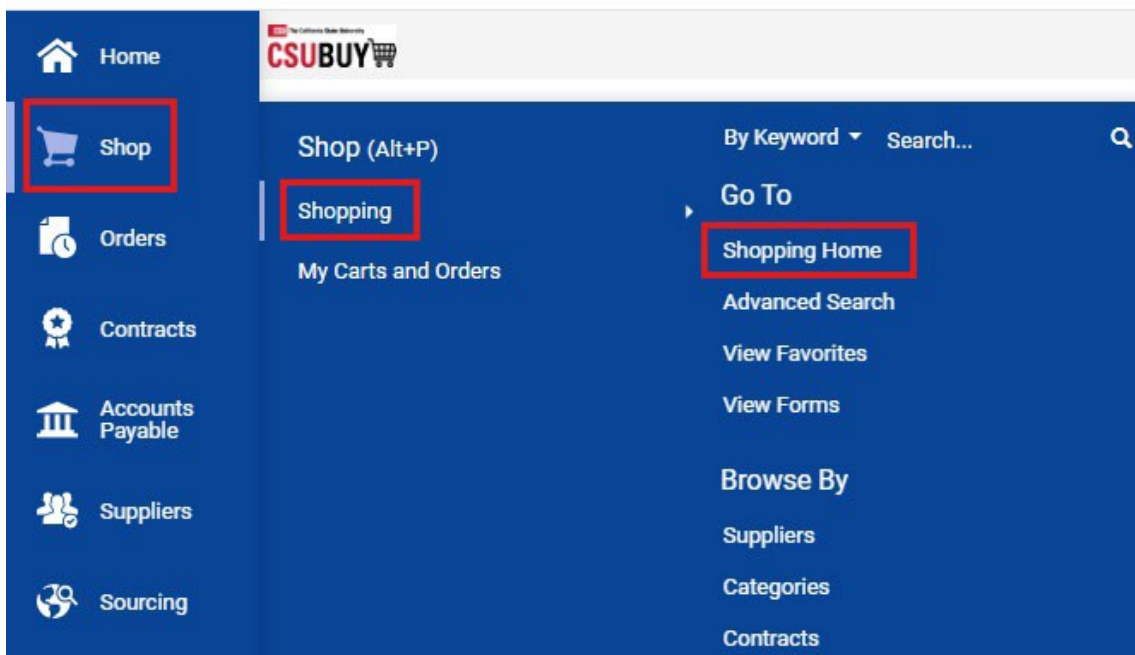
Shopping Cart • Shopping Cart

The screenshot shows the 'Shopping Cart' page. At the top, there are tabs for 'Simple' and 'Advanced', with 'Simple' selected. Below the tabs is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a magnifying glass icon. To the right of the search bar, a red callout box with an arrow pointing to it says 'Start shopping here'. Below the search bar, there are two input fields: 'Cart Name' with the value '2025-10-28 40000300731 01' and 'Deliver To Location' with the value 'BH-155_LBCMP'. A red callout box with an arrow pointing to the 'Cart Name' field says 'Edit Cart Name here'. Below the input fields, it says '0 Items' and 'Your shopping cart is empty! Click here to start shopping'. A red callout box with an arrow pointing to the 'Click here to start shopping' link says 'Start shopping here'.

3-PRODUCT SEARCH

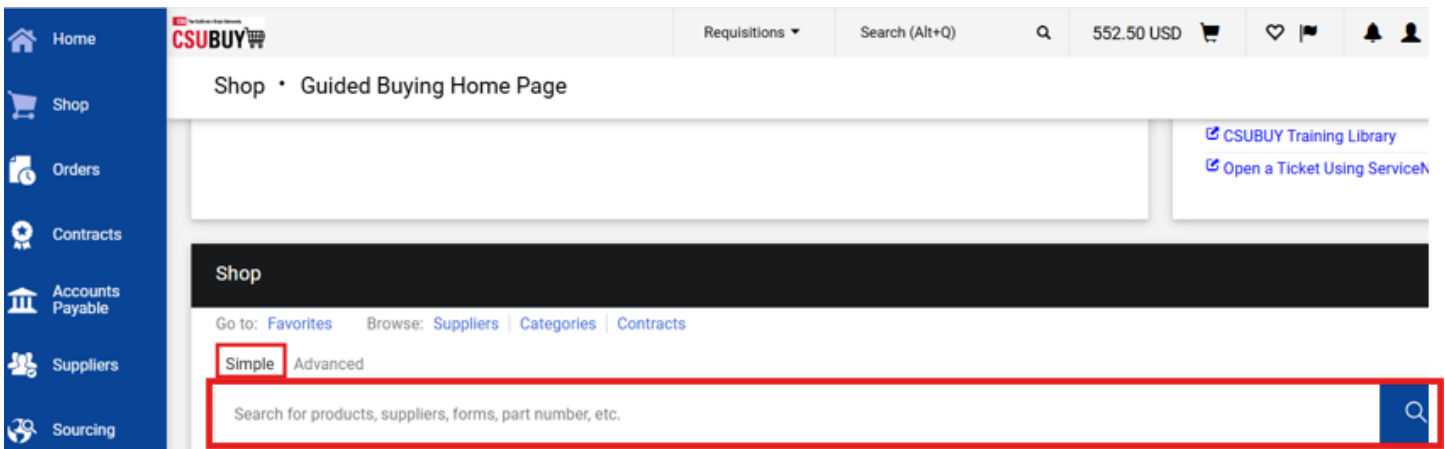
To begin shopping, you may start with a product search. This will provide products options and prices to compare.

Navigate to the Shopping Home Page.

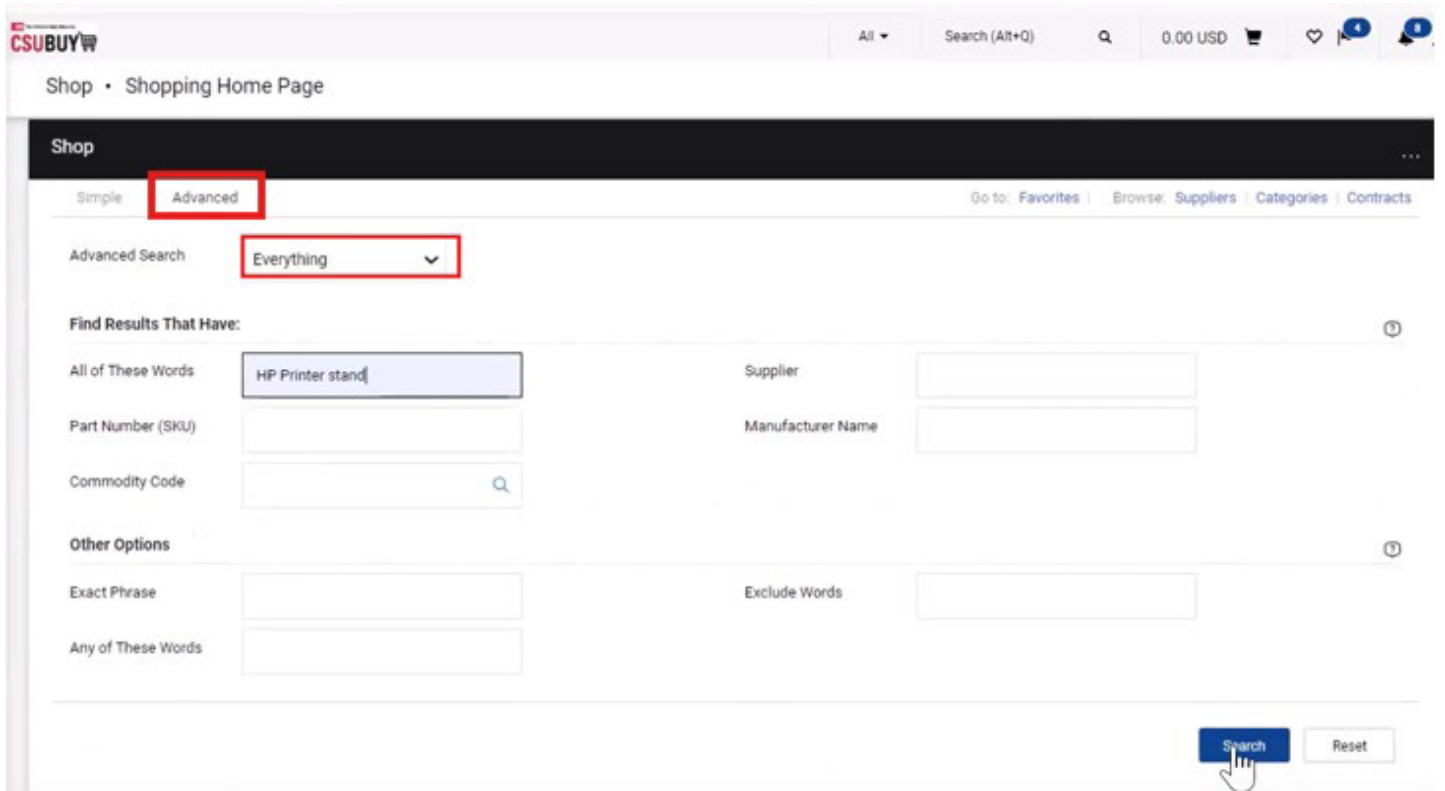


Simple and Advanced Product Search

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'd like to see the search result as tiles (shown below) or as a list.

Simple Advanced

HP Printer

Compare BEST MATCH

Search Results: 1744

Filters

By Product Flag

☐ Recycled (5)

By Supplier

☐ Staples (884)

☐ GovConnection (854)

☐ Fisher Scientific (6)

[Select Multiple Filters](#)

By Category

☐ Printer or facsimile toner (1393)

☐ Printer and photocopier and facsimile accessories (150)

☐ Laser printers (39)

☐ Ink cartridges (35)

☐ Printer or copier paper

Printer HP PS AIO C309G
from Staples
Part Number HEW-CD055A
[Order From Supplier](#)

HP PRINTER CLJ CP4525N
from Staples
Part Number 846844
[Order From Supplier](#)

HP Q75
from Staples
Part Number 633154
[Order From Supplier](#)

Printer HP DJ T7100 COLOR
from Staples

PRINTER HP DESIGNJET 130R
from Staples

PRINTER HP OFFICEJET 7000
from Staples

Best Match

Part Number

Description

Size

Packaging UOM

Supplier

(Price: Low to High)

(Price: High to Low)

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

BEST MATCH

Search results

☐ Delivery Lead Time

☐ Mfg. Name

☐ Mfg. Part No.

☐ Part No.

☐ Product Flags

☒ Supplier

☐ Supplier Classes

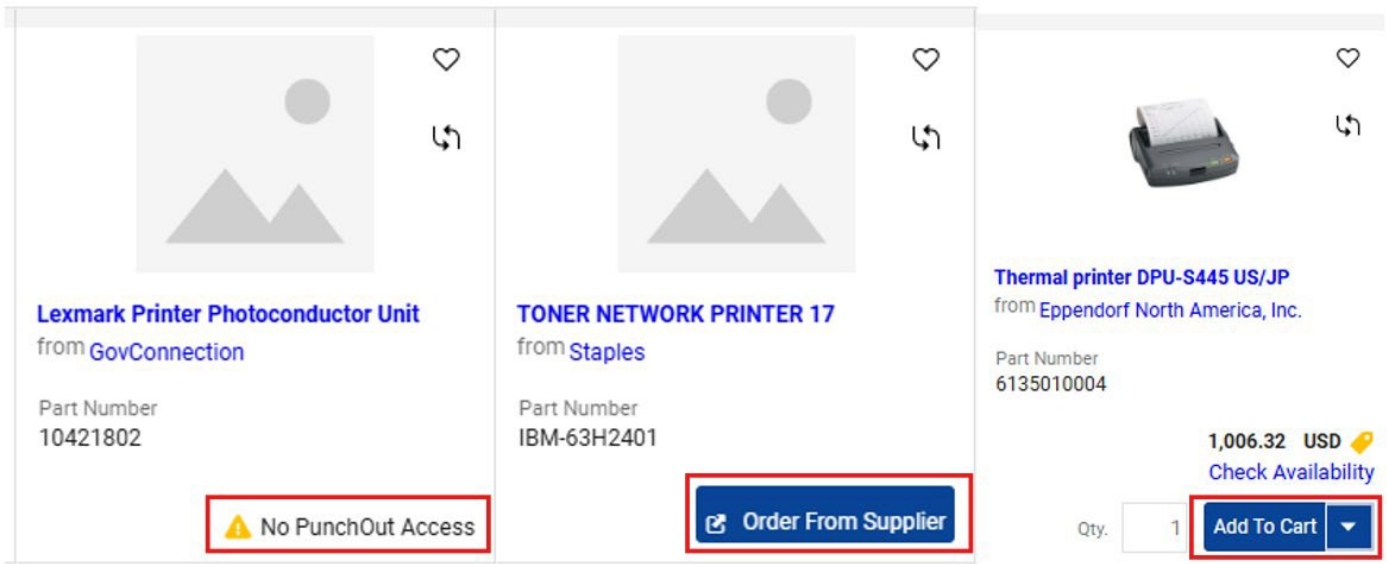
☐ System Packaging

☒ Volume Pricing

[Apply](#) [Cancel](#)

Search Results & Ways to Add to Shopping Cart

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



No Punchout Access – You need to go to the supplier website and search for the product to obtain the price. You would then need to use a **Form** to input the product information for purchase. Forms are covered in Section 5-Adding Items to a Shopping Cart: Forms

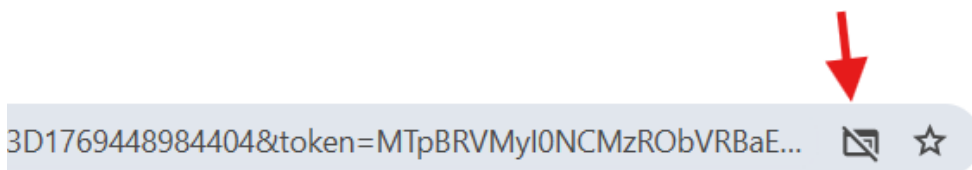
Order from Supplier – When clicking on the box, you will be punched out to the Supplier website. You would then search for the product and add it to the Supplier cart. Once you check out, you will then be punched into the CSUBUY with the item in your Shopping Cart. This type of Supplier is known as a 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

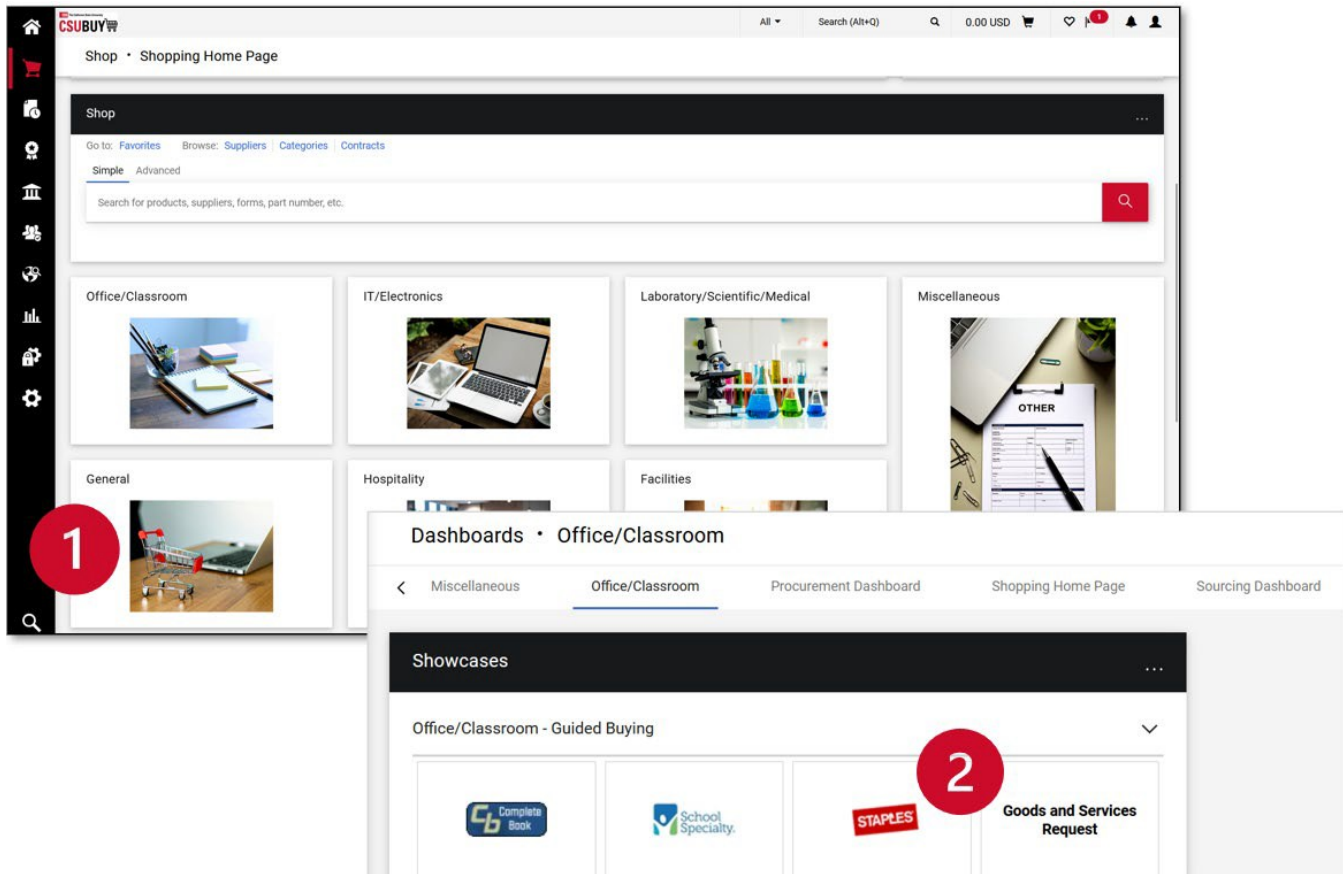
There are catalogs from different suppliers (PunchOut suppliers) such as Staples and Amazon, which you access by clicking on their tile found in the Shopping Home Page. When clicking on their tile, you will be “punched out” to their site and are then able to search for the product and add to the Shopping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

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



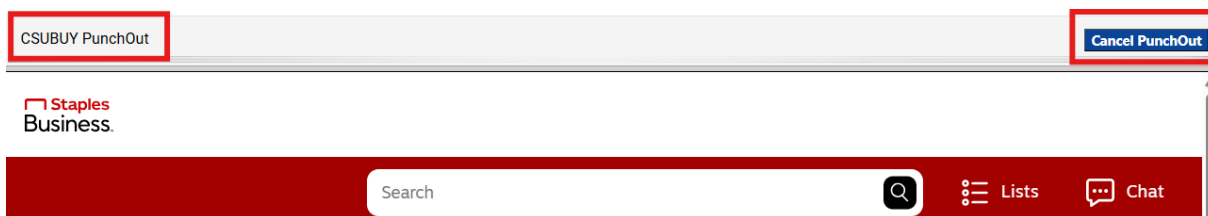
Click on the Pop-Up Blocker and then select Allow.

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.

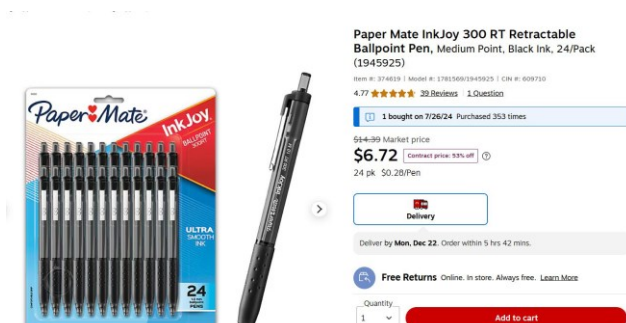


After selecting a supplier, you will be redirected or punched out to the supplier's website.

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.

At Checkout you would review and then submit the order.

Review & Checkout



Order Summary	
Items (2)	\$103.83
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 to 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 Punch Out 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 processes 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:

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.

IT Hardware Request

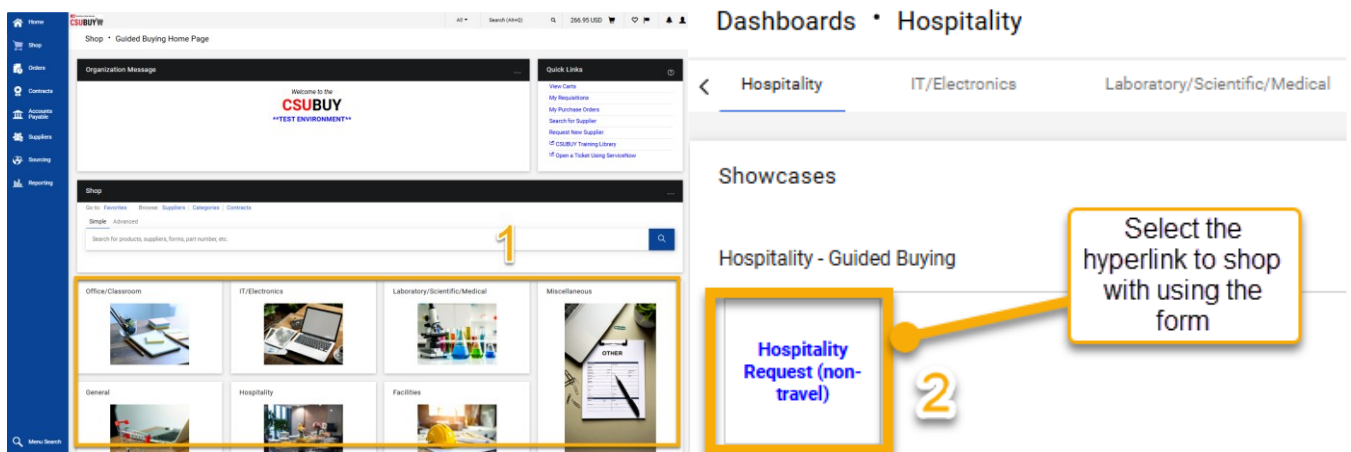
Utilize this form to initiate a request for IT Hardware and Accessories.

IT Software Request

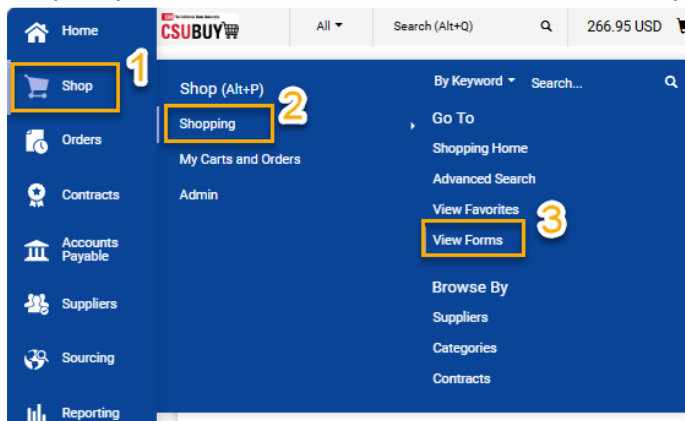
Utilize this form to initiate a request for IT Software or Cloud Services. 33

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.



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.

The screenshot shows the 'CSU Forms' page. On the left, a sidebar lists 'Personal' and 'Shared' categories. Under 'Shared', 'CSU Forms' is highlighted with a red arrow and the number 4. The main area displays a table of forms with 1-9 of 9 results. The forms listed are 'Facilities and Construction Request', 'Goods and Services Request', and 'Hospitality Request (non-travel)'. The 'Hospitality Request (non-travel)' form is highlighted with a red arrow and the number 5. Each form entry includes a 'Submit Request' button and a 'Copy' link.

Completing the Form

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

The screenshot shows the 'Hospitality Request (non-travel)' form. The left sidebar contains a navigation menu with 'Instructions', 'Suppliers', 'Form Fields', 'General Information', 'Cost Details', and 'Review and Submit'. The main area displays the 'Instructions' section, which includes a list of examples and a note about when not to use the form. A red note at the bottom states: '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.' A yellow callout box with the number 1 points to the 'Suppliers' section, stating: 'This area outlines the required information'. Another yellow callout box with the number 2 points to the 'Next' button, stating: 'Fill out each section and select 'Next' to complete the form'.

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.

The screenshot shows the 'Hospitality Request (non-travel)' form in the 'Review and Submit' section. The left sidebar shows the progress of each section: 'Suppliers' (checked), 'Form Fields' (checked), 'General Information' (checked), and 'Cost Details' (checked). The main area displays a table with the progress of each section. A green banner at the top indicates 'Required Fields Complete'. A yellow callout box with the number 2 points to the 'Suppliers' section, stating: 'When each section has been completed, it will display green check marks. You are ready to submit as a requisition!'. A green callout box with the number 3 points to the 'Add and go to Cart' button, stating: 'If this is a recurring purchase, you can add to your Favorites for faster checkout'.

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.

The screenshot shows the 'Review and Submit' stage of a 'Goods and Services Request' form. The 'Add And Go To Cart' dropdown menu is open, showing options: 'Add and go to Cart', 'Save to Cart and Add Another' (highlighted with a red box), 'Add to Cart and Return', 'Add to new Cart', 'Add to Draft Cart or Pending PR/PO', 'Add to Draft Change Request', and 'Add to PO Revision'. The form fields include 'Suppliers' (Acme Corporation, CA State University Long Beach), 'Form Fields' (General Information, Other Goods & Services), and a 'Summary' sidebar on the right.

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.

The screenshot shows a shopping cart entry for 'Acme Corporation' with 50 items for a total of 5,000.00 USD. Below the supplier details, there is a table with columns: Line, Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. The 'Item' column contains a link labeled 'Goods and Services Request' which is highlighted with a red box.

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

The screenshot shows the 'Suppliers' tab selected in the 'Review and Submit' stage. The 'Suppliers' tab is highlighted with a red box. The 'Review and Submit' tab is also highlighted with a red box. The 'Suppliers' section shows 'Selected Supplier' (Quality Classroom Supplies) and 'Search Registered Suppliers' (Supplier, Zip Code, Within 5 Miles). The 'Summary' sidebar on the right shows 'Goods and Services Request' details.

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

The screenshot shows the 'Form Fields' tab selected in the 'Procurement Request' process. The breadcrumb trail is 'Procurement Request • Goods and Services Request'. Below the breadcrumb, there are three tabs: 'Suppliers', 'Form Fields' (which is active and highlighted with a red box), and 'Review And Submit'. Under the 'Form Fields' tab, there are three sub-tabs: 'General Information', 'Other Goods & Services', and 'Cost Details'. The 'General Information' sub-tab is active and highlighted with a red box. The main content area shows a form with a label 'What type of goods or services are you requesting?' followed by a search icon and a dropdown menu currently set to 'Goods - Other'.

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

This screenshot shows the 'Review And Submit' tab selected in the 'Procurement Request' process. The breadcrumb trail is 'Procurement Request • Goods and Services Request'. Below the breadcrumb, there are three tabs: 'Suppliers', 'Form Fields', and 'Review And Submit' (which is active and highlighted with a red box). In the top right corner, there is a 'Save Progress' button and an 'Add And Go To Cart' button, which is highlighted with a red box.

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.

The screenshot shows the CSUBUY Shopping Cart page. The breadcrumb trail is 'Shopping Cart • Shopping Cart'. Below the breadcrumb, there is a navigation bar with 'Go to: Favorites', 'Forms' (highlighted with a red box), and 'Browse: Suppliers | Categories | Contracts'. Below this, there are two tabs: 'Simple' and 'Advanced'. The 'Simple' tab is active and highlighted with a red box. Below the tabs, there is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.'

Then proceed to complete it and Add to your Cart.

Note on Blanket PO

When completing a Form in the General Information section, you will need to indicate if the purchase is related to a Blanket PO. 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

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.

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. Example 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.

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.

You may also adjust the **Deliver To Location** which is typically the building and room number you would like your product delivered. You may search for available places using the magnifying glass icon.

Cart Name

2025-12-12 40000961994 01

Deliver To Location

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. 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.

1	Test Procurement Request: Goods and Services Request	EA	500.00	Qty: 3 EA	1,500.00
---	---	----	--------	-----------	----------

ITEM DETAILS

Performance Start Date

Performance End Date

[more info...](#)

Commodity Code

170003

General Supplies

Receiving Required

▼

Taxable

Asset

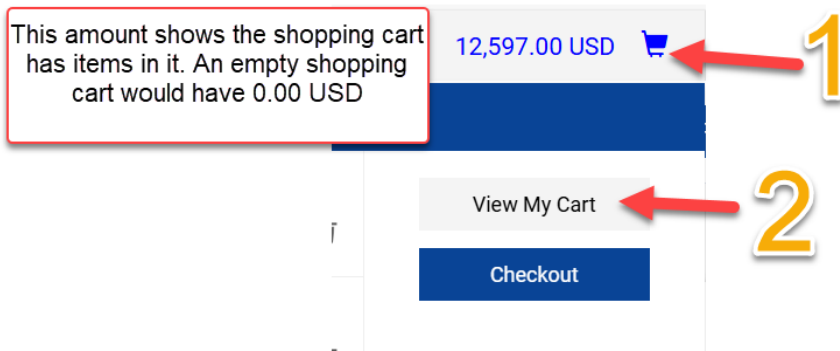
☐

Creating a New Shopping Cart

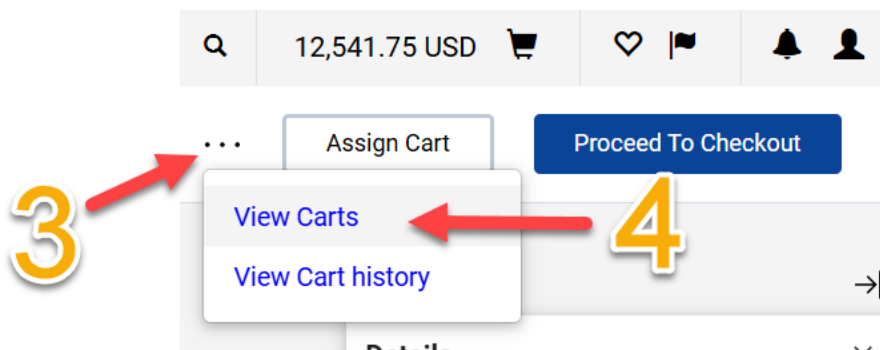
You may save your current Shopping Cart with items in it as a draft and create a new Shopping Cart by following these instructions:

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

This takes you inside your shopping cart.

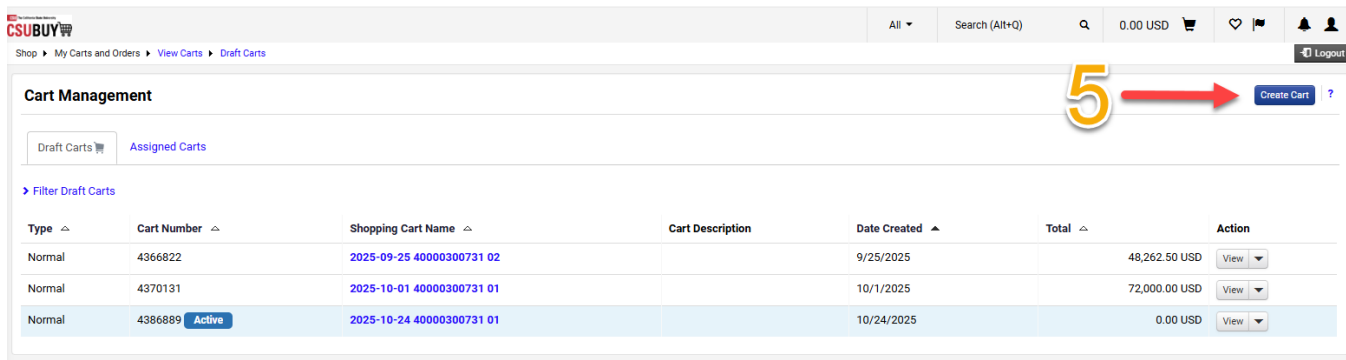


Click the 3 dots in the upper right corner and select **View Carts**



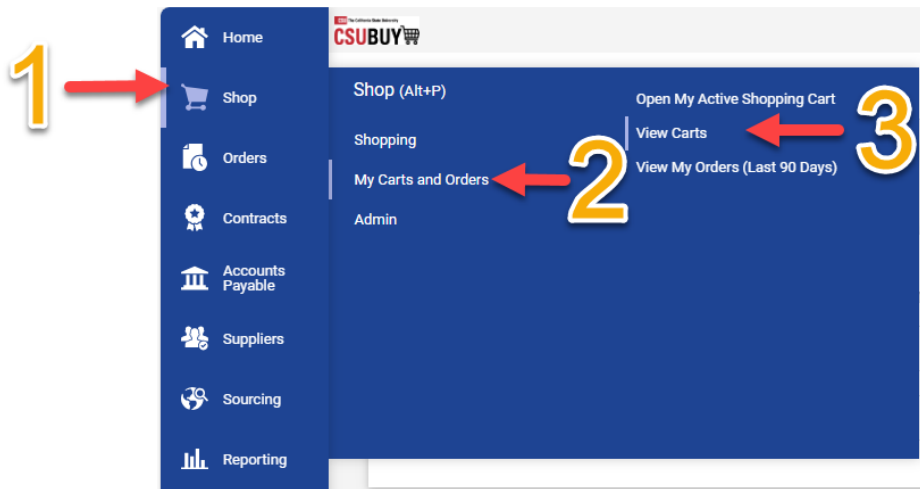
This takes you to the Cart Management screen with all the Draft Carts. The Cart Number is actually your DRAFT Requisition number.

Click on **Create Cart**



Viewing Draft Carts

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



Cart Management

Draft Carts

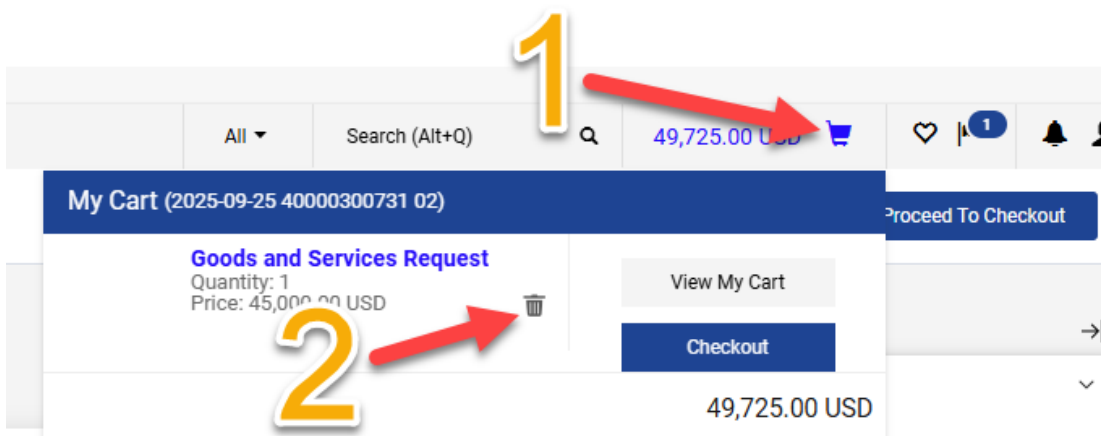
Assigned Carts

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	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**.

Cart Management Create Cart ?

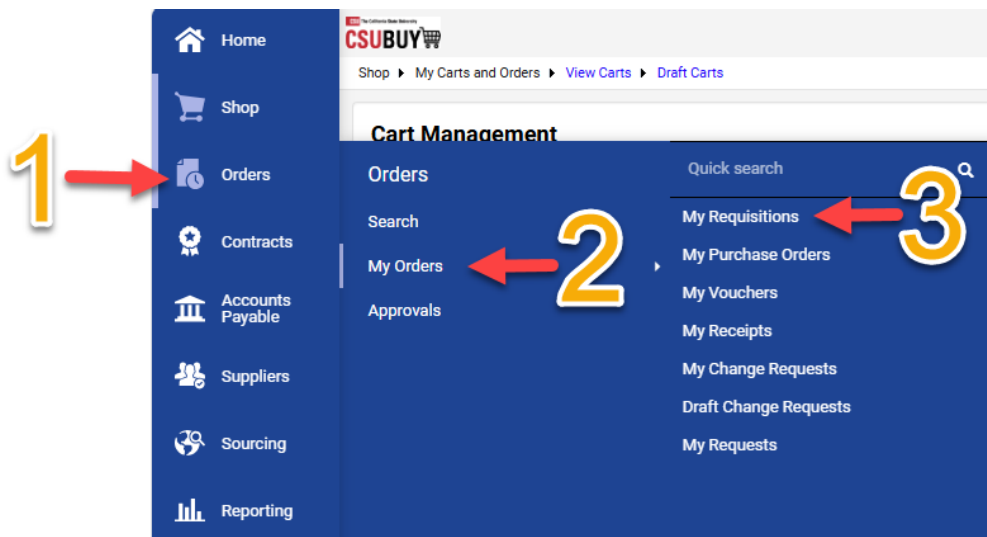
Draft Carts Assigned Carts

> Filter Draft Carts

Type ^	Cart Number ^	Shopping Cart Name ^	Cart Description	Date Created ^	Total ^	Action
Normal	4366822 Active	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	2025-10-24 40000300731 01		10/24/2025	0.00 USD	Delete

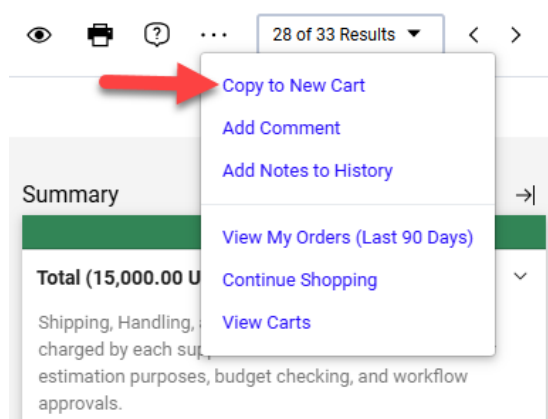
Copy to a Shopping Cart (For Forms ONLY; not for PunchOut Orders)

You may copy a previous order to a new Shopping Cart. This is helpful if you have items that you purchase frequently. You could 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 have the ability to perform the following actions in the Shopping Cart.

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

Change Commodity Code

Requires Sourcing

Remove Requires Sourcing

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 Name2025-12-12 40000961994 01

Deliver To LocationAS-112_LBCMP

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

Contractno value

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

Summary

Details

ForMinna Chang

Total (3,315.00 USD)

Shipping, Handling, and Tax charged by each supplier. The va estimation purposes, budget che

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**.

CSUBUY

All Orders ▾

Search (Alt+Q)

49.51 USD

2

2

Shopping Cart • Shopping Cart

Guide Me

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 important 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 displays the 'Summary' tab of a DRAFT Requisition. It is divided into several sections, with five specific areas highlighted by red circles and numbers:

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

Additional sections visible include 'Bill To' (Accounts Payable, Chico, California State University, Chico, 400 West 1st Street, Chico, CA 95929, United States) and 'Chartfield' (Values vary by line).

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.

Multi-Year PO

This should never be selected for our campus.

4. 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.

5. 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

✗

more info...

Contains Discount

✗

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	Account	Account Override	Program	Class	Project
LBCMP	no value	no value	660003_LBCMP	no value	no value	no value	no value

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


For each item, a Chartfield entry is required.


See Section 9-Draft Requisition: Chartfields

Comment, Attachments, and History

 Requisition • **211592313** **Guide Me**

[Summary](#) [Taxes/S&H](#) [PO Preview](#) [Comments](#) [Attachments](#) [History](#)

General Information 

Address Information 

PO Information

Transaction Details

Cart Name2026-01-28 40000961994 01

Business UnitLB - CA State University Long Beach P2P (LBXMP)

Ship To

Attn: Minna Chang
CSU Long Beach - Receiving
1331 Palo Verde Ave
Long Beach, CA 90840-0005
United States

Deliver To

Deliver To LocationAS-112_LBCMP
Academic Services

Ship ViaBest Carrier-Best Way

Accounting Dateno value

PO Typeno value

Amount-Only / Blanket PO✗

Multi-Year PO✗

Reference IDno 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  

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.

Attach file (optional)

Attachment Type

☒ File

☐ Link/URL

File Name

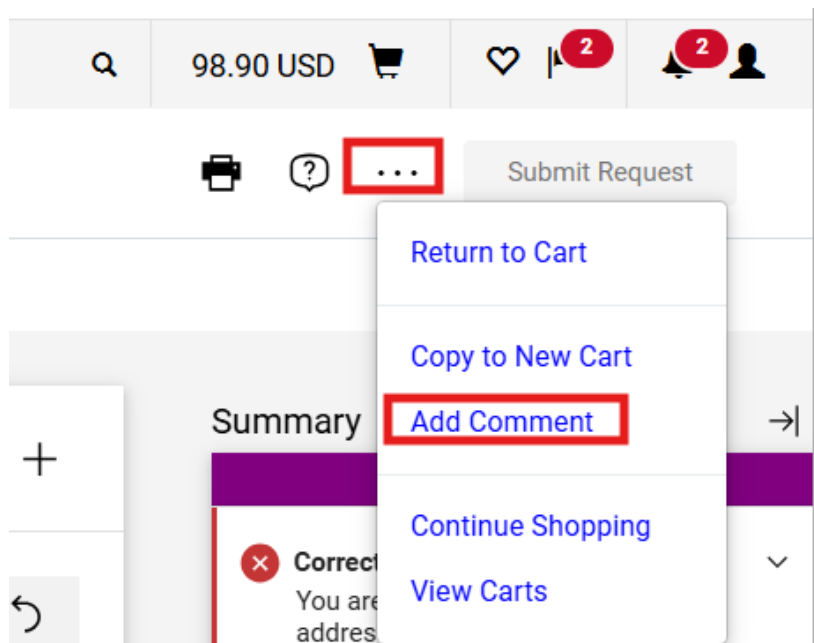
File

Choose File

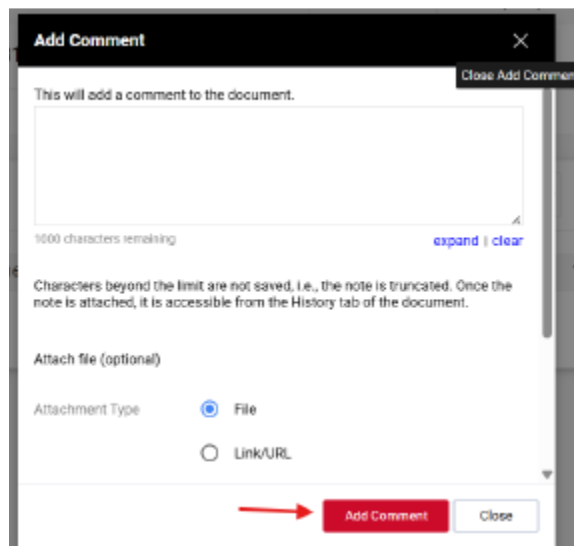
Upload your file

44

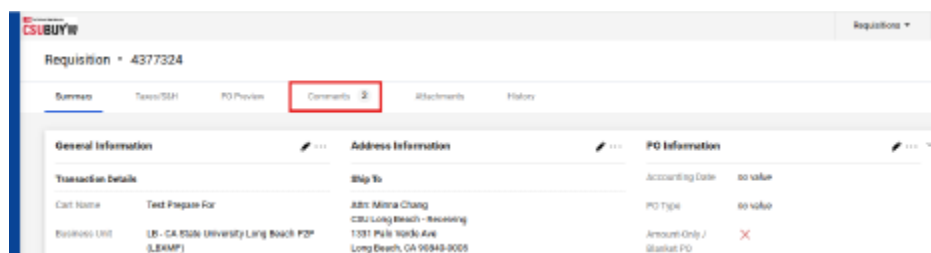
You may also add a comment by clicking on the three dots and selecting Add Comment



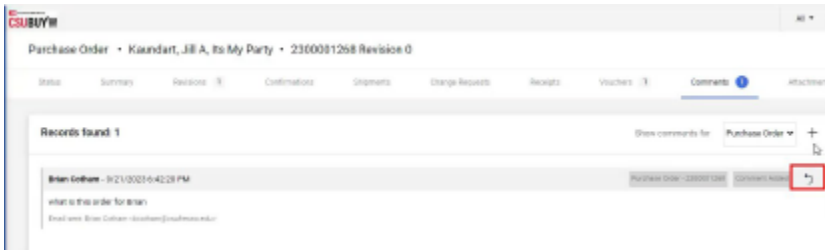
The pop-up will appear where you may type your comment. You also have the option to add an attachment.



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 attachment 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.

Start date
mm/dd/yyyy

End date
mm/dd/yyyy

▼

Action

User 🔍

Filter

Clear All Filters

Export CSV

◀
▶
Page

1

of 2
1-20 of 23 Results

20 Per Page ▼

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 ensuring the purchase is recorded in the ledger appropriately.

Enter Chartfields

The values in the chartfield will be automatically populated if you set up your Code Defaults. (See Chapter1 Profile Set Up, Section 4 Setting Account Code Defaults) The Account is populated automatically based on the Commodity Code.

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

^ CHARTFIELD

Values have been overridden for this line
✎
🗑

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Progr
LBCMP CA State University Long Beach	SS007_LBCMP Financial Management	00738_LBCMP Financial Management	105003 Vehicles	619001_LBCMP Other Equipment	no value	no val

46

You may edit the Business Unit, Fund, and Department ID. The Commodity Code and Account is automatically populated. 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.

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.

^ CHARTFIELD

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.

1

✓

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

2

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	B00OCPPFK4	EA	39.47	1 EA	39.47	

3

Copy

Close

10-ASSIGN CART & SUBMIT REQUEST

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

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

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

Assign Cart if you are a Shopper.

All ▾

Search (Alt+Q) 🔍

376.05 USD 🛒

🍷

📖

🔔

👤

👁️

🖨️

❓

⋮

Assign Cart

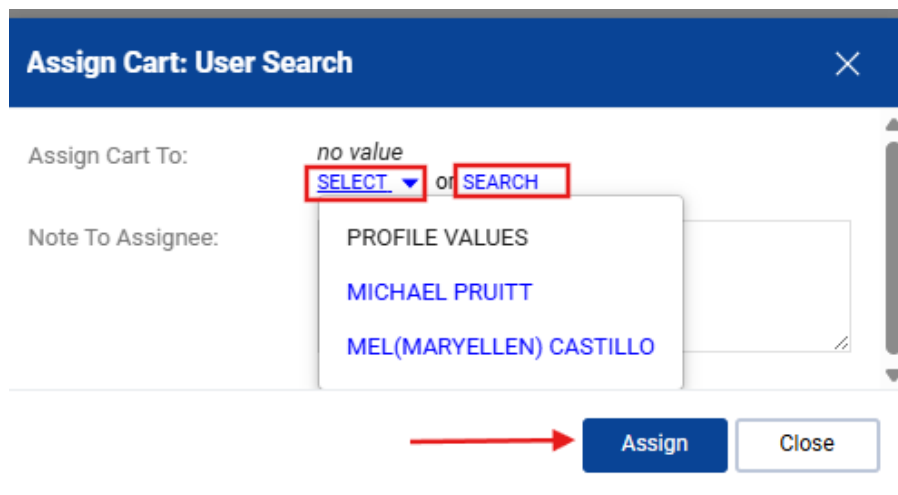
Summary →

Draft

48

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**.

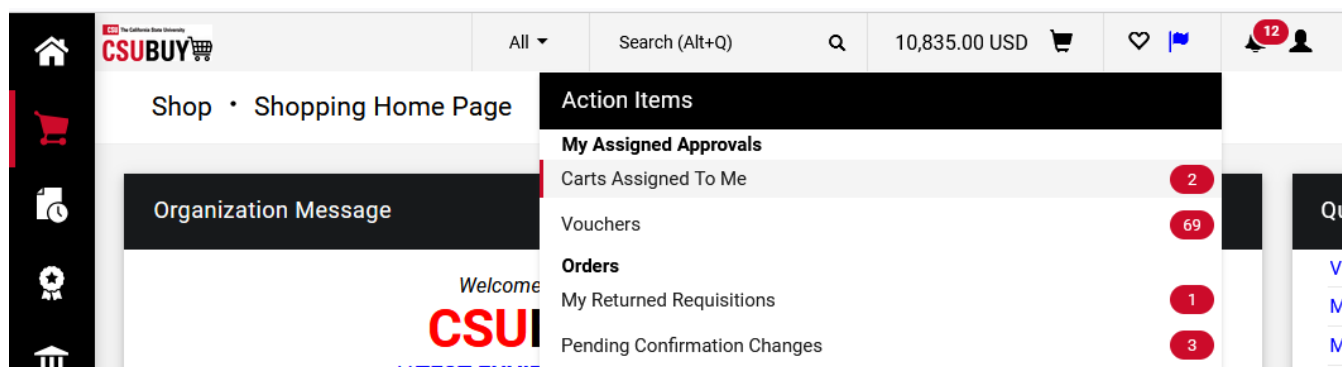


The image shows a dialog box titled "Assign Cart: User Search". It has a close button (X) in the top right corner. Below the title, there are two fields: "Assign Cart To:" and "Note To Assignee:". The "Assign Cart To:" field has a dropdown menu with "no value" selected, and a "SELECT" button next to it. The "Note To Assignee:" field is empty. Below the "Assign Cart To:" field, there is a list of profile values: "MICHAEL PRUITT" and "MEL(MARYELLEN) CASTILLO". A red arrow points to the "Assign" button at the bottom right of the dialog box.

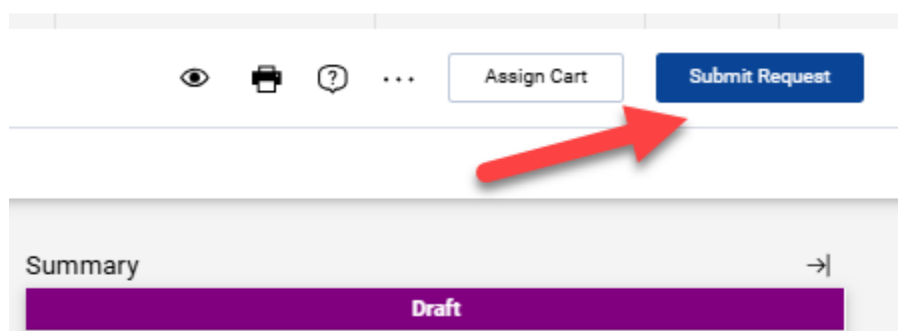
Receiving Cart from a Shopper & Submit Request

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 has the ability to edit any field with the pencil icon. The Requester would then **Submit Request**.

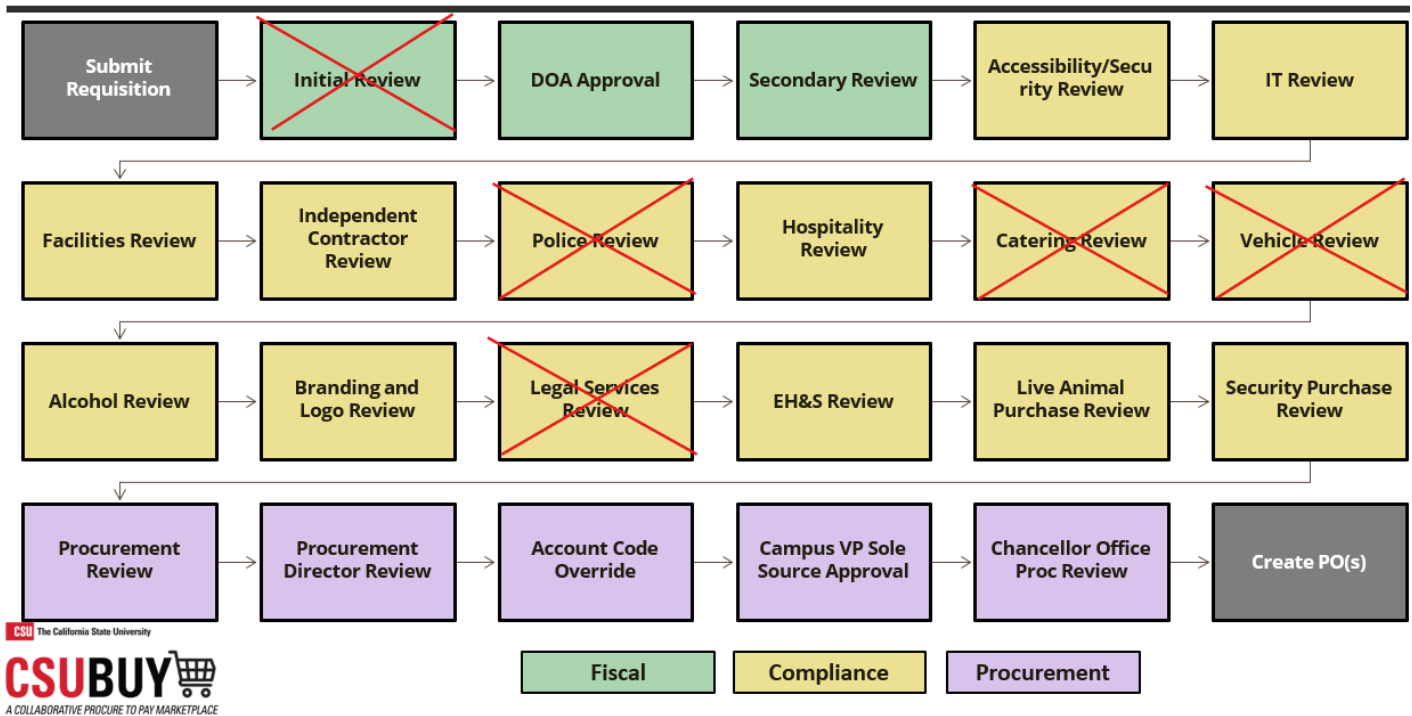


The image shows a button labeled "Submit Request" with a red arrow pointing to it. Below the button, there is a section titled "Summary" with a "Draft" status bar.

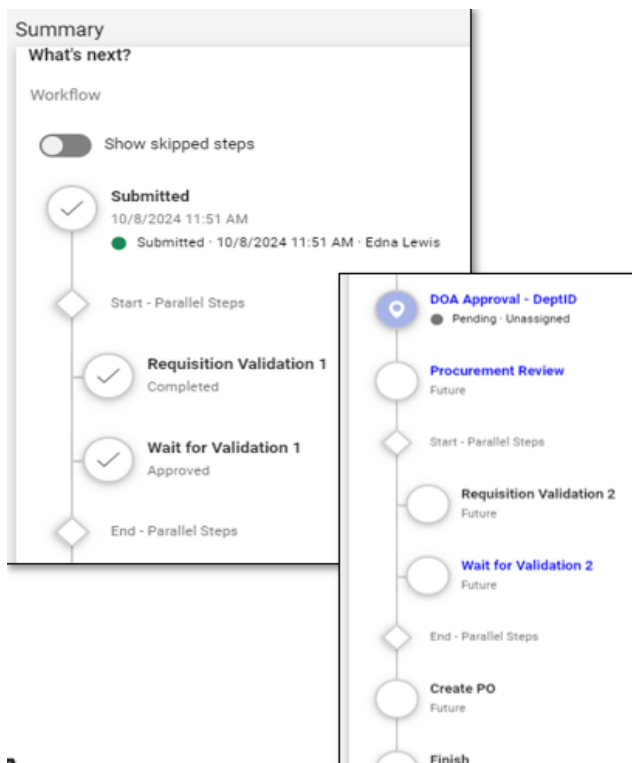
11-REQUISITION WORKFLOW

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

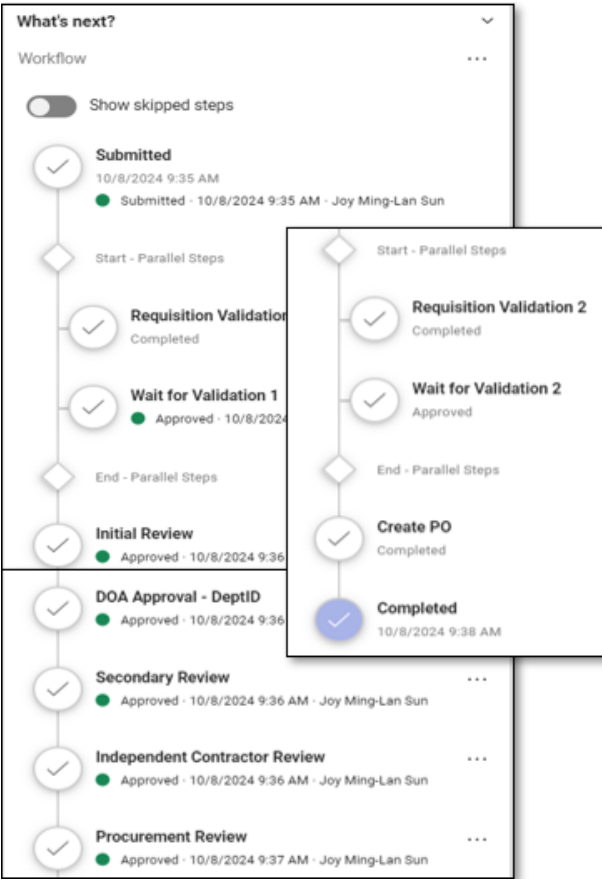


Workflow in CSUBUY: Pending at DOA Approval



Workflow in CSUBUY: Completed

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



Bypass Procurement Review

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

Low Risk Commodity Codes are ONLY: 145009, 145010, 145011, 145012, 170001, 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">• Lab/Scientific Supplies• Medical Supplies• Office Supplies• Photography Supplies• Custodial Supplies• Facilities Supplies• Housing Supplies• 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 Triggers

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

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

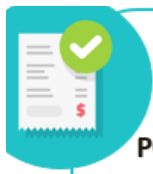
The list provides the Commodity Code that triggers the Compliance Review and requirement to Create a Receipt for the good.

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 & Accessibility/Security Review		616003	I/T Software
115005	IT Software Maintenance	IT Review & Accessibility/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 (Libry 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

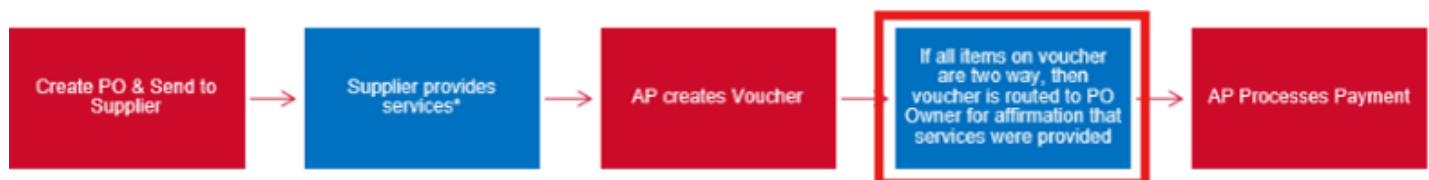
100004 Group II Capital Assets	105002 Equipment	105003 Vehicles	105004 Farm Equipment
115002 IT Hardware	150003 Works of Art	150006 Controlled Substances	150019 Weapons
180002 Library Books (Library Only)	180003 Library Serials (Library Only)	180004 Library Periodicals (Library Only)	

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 has the ability to 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

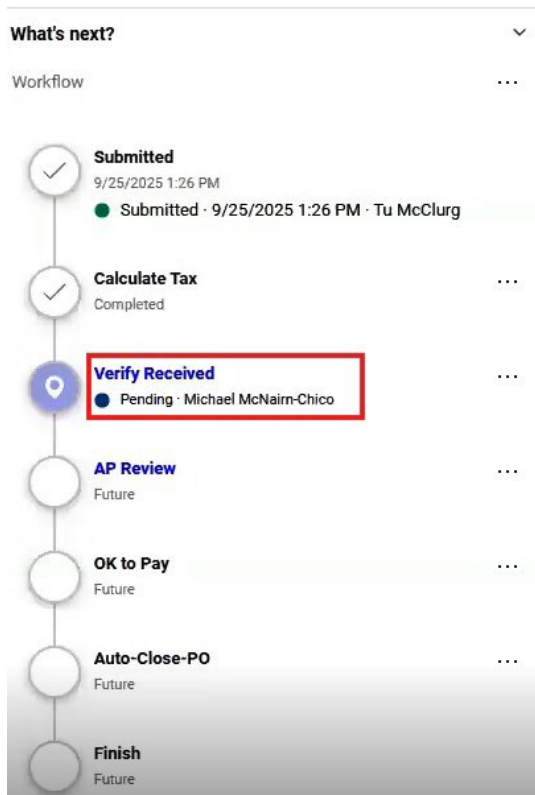
Verify Receipt is part of the Voucher Workflow and is a means for AP to know the good or service was received and therefore it is a confirmation that the vendor/supplier could be paid. AP initiates the Voucher Workflow process by submitting an invoice from the supplier/vendor for the good. (Note, in 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. 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.



The Voucher Owner would open the Voucher.

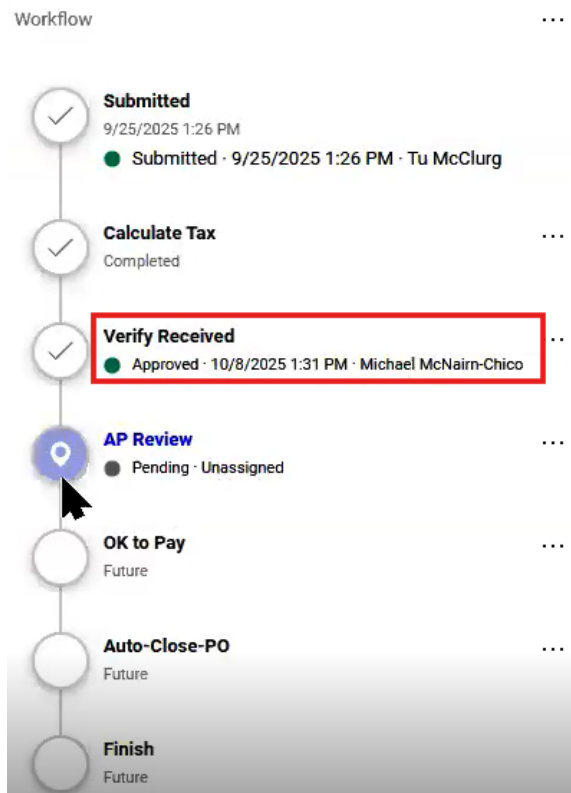
Voucher • [Acme Corporation](#) • C003024T

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							Voucher Owner		Michael McNair-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		no value (mm/dd/yyyy)			
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 and is considered a 3 Way Match.

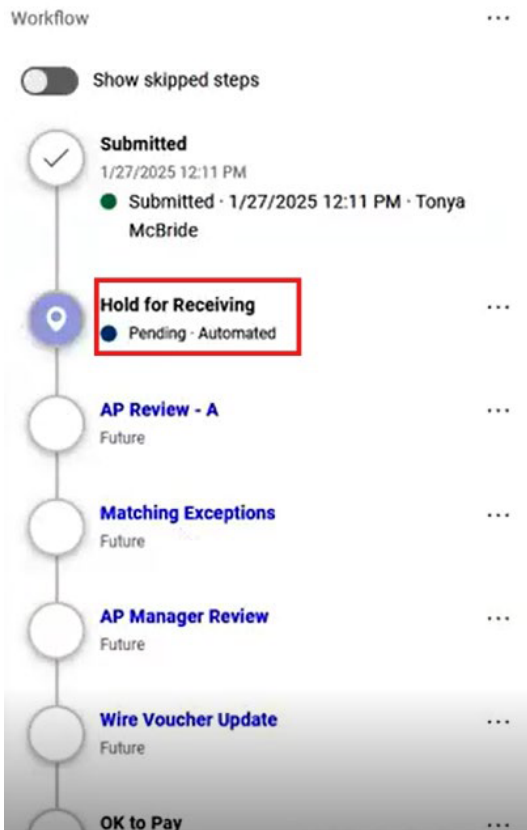
Create a Receipt action is taken when the good is received. Note that you can Create a Receipt even if the Voucher Workflow process has not been kicked off. This is because the Create a Receipt occurs in the Purchase Order and not the Voucher. However, the Voucher Workflow identifies whether the Receipt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

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



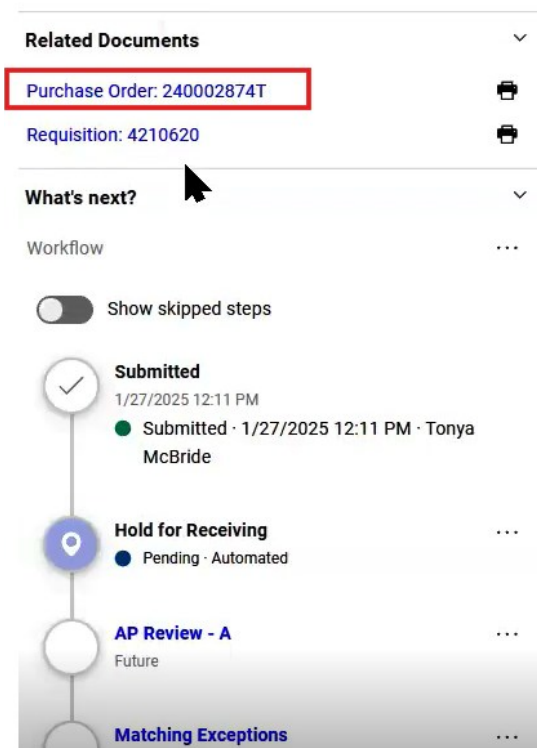
When creating a receipt, you may create a quantity receipt entering the number of items received or a cost receipt entering the cost of the service. Cost receipts are only for Amount-Only/Blanket PO. An example would be a PO for 100 hours of legal services in which the cost of the service would be entered in 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. 63

In order 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

StatusSummaryRevisions1ConfirmationsShipmentsChange RequestsReceiptsVouchersCommentsAttachmentsHistory

General Information

Supplier Name

Acme Corporation

Purchase Order No.

240006341T

Purchase Order Date

12/8/2025

Revision No.

0

Revision Date

12/8/2025

Owner Name

Minna Chang

Owner Email

minna.chang@csulb.edu

Document Status

Requisition Number

4406630 view | print

Workflow

✓ Completed
(12/8/2025 4:46 PM)

PO Status

Open

Distribution Status

Sent To Supplier

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view

Email (HTML Body)

somebody@nobody.com

Distribution Date/Time

12/8/2025 4:46 PM

Then click on the **PLUS** sign:

Purchase Order • Acme Corporation • 240006341T Revision 0

StatusSummaryRevisions1ConfirmationsShipmentsChange RequestsReceiptsVouchersCommentsAttachmentsHistory

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	<input checked="" type="checkbox"/>

There is the option for Received, Returned, Cancelled

Then click on **Complete**:



Save Updates

Complete

▼

The confirmation box then appears:

✓ Receipt Created

Summary

Receipt No761895

Created for the PO No(s)240006341T

Next Steps

Create Qty Receipt

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

StatusSummaryRevisions1ConfirmationsShipmentsChange RequestsReceipts1VouchersComments

General Information

Supplier Name

 [Acme Corporation](#)

Purchase Order No.

240006341T

Purchase Order Date

12/8/2025

Revision No.

0

Document Status

Requisition Number

4406630 [view](#) | [print](#)

Workflow

✓ Completed
(12/8/2025 4:46 PM)

PO Status

Open

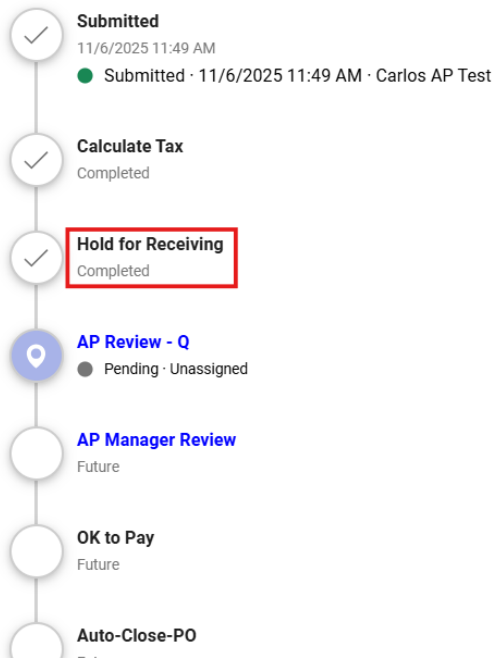
Distribution Status

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



NOTE:

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 is 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.

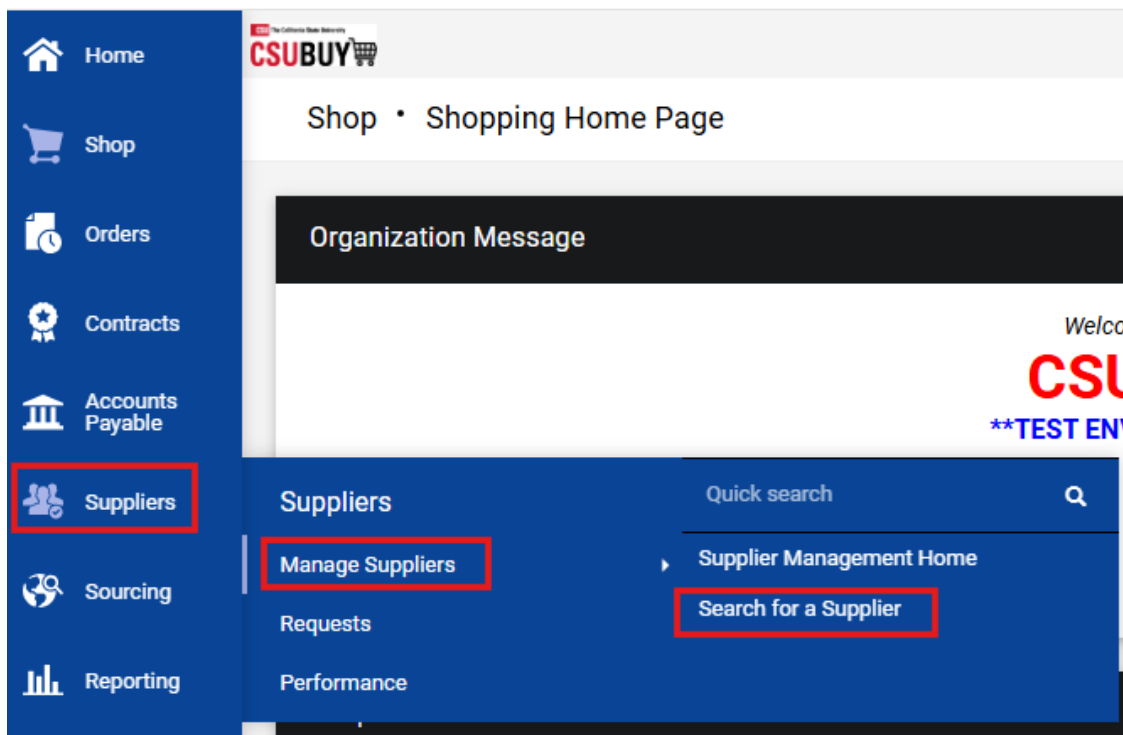
14-SUPPLIERS

In order to purchase from a Supplier, the Supplier must be onboarded to CSUBUY. If a Supplier has onboarded to CSUBUY but has not been used by our campus, an invitation must be extended to the Supplier so that our campus could purchase from them.

Searching for a Supplier

Searching for a specific supplier can be done using the Supplier Flyout.

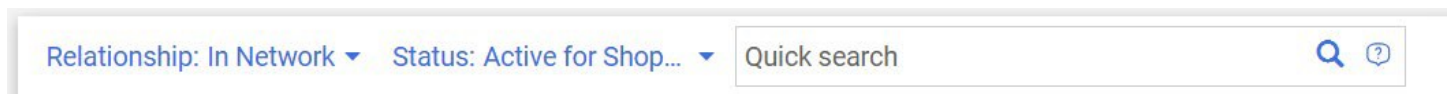
From the flyouts to the left of the home page, select Suppliers> Manage Suppliers> Search for a Supplier





To search for only active suppliers set the search filters for **Relationship: In Network** and **Status: Active for Shopping**. If you would like to search for all suppliers, set the Status to All.

Not Active for Shopping means the suppliers on-boarding process to CSUBUY is not complete. You may contact the Supplier Manager for CSULB if you would like more details.

Before selecting a supplier, always verify that you are shopping for suppliers within network.




The suppliers' registration status when you have your search status set to 'All' will display 'None', 'Invited', 'In Progress', 'Profile Complete', 'Rejected' or 'Approved' **For you to be able to purchase from an Approve Supplier, the Supplier must be active for the Business Unit you are shopping from.**

	Company Name ▲	Supplier Classes	Last Modified ▼	Supplier Number ▲	Registration Status ▼	Registration Type	Registration Date ▼	Supplier Type
 	QIAGEN, Inc (QIAGEN)		9/18/2024 9:15:40 AM	0000001645	Approved	Solicited	4/3/2023	Hosted Catalog, Mobile PunchOut

Select the supplier for additional information and more importantly to determine if the Supplier is active for **CSULB Business Units** so that you can purchase from them. If not, you must extend an invitation to the supplier. In the example below, only SOXMP Business Unit can purchase from this supplier. If you would like LBXMP to be added, please note the **Legal Name** and **Supplier number** which is needed to invite this supplier to be a LBXMP supplier.

17th & Montgomery LLC



Supplier Number 1010006587
Registration Status Approved
Registration Type Solicited

Supplier 360

Supplier Details

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

Business Description

Products and Services

NAICS Codes

Primary
711510 - Independent Artists, Writers, and Performers

Secondary
611430 - Professional and Management Development Training

Commodity Codes

115009 (IT Consulting)
150018 (Training/Professional Dev)

Keywords

There is no Keywords to

Internal Notes






10/1/25 (KK) Ran Manual GIACT

Verification Results

How to Extend an Invitation to a Supplier Not Yet Active for CSULB Business Units

In the Homepage, go to the sidebar Flyout and select Shop>Shopping>View Forms

Then select CSU Forms.

 Home
  Shop
  Orders
  Contracts
  Accounts Payable

CSUBUY

Shop > Shopping > View Forms

Expand All | Collapse All

Personal

You have no personal favorites.

Shared

CSU Forms

Manage Saved Forms

This section provides easy access to the both of which are created and managed in

Scroll down to the bottom and select Supplier Extension or Re-Invite. 69

You would use this Form to extend an invitation to a Supplier so that a CSULB Business Unit may shop from the Supplier.

Payment for Unauthorized Purchase Template Title: Payment for Unauthorized Purchase Purpose: Procurement Request	0.00 USD Submit Request Copy	<input type="checkbox"/>
Request to Close PO Template Title: Request to Change PO Status (Cancel, Close, Reopen) Purpose: Generic Request	Submit Request Copy	<input type="checkbox"/>
Supplier Extension or Re-Invite Template Title: Supplier Extension or Re-Invite Purpose: Generic Request	Submit Request Copy	<input type="checkbox"/>

1-9 of 9 Results 20 Per Page

Once you open the Form, please complete including the Legal Name CSUBUY Supplier Number.

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.

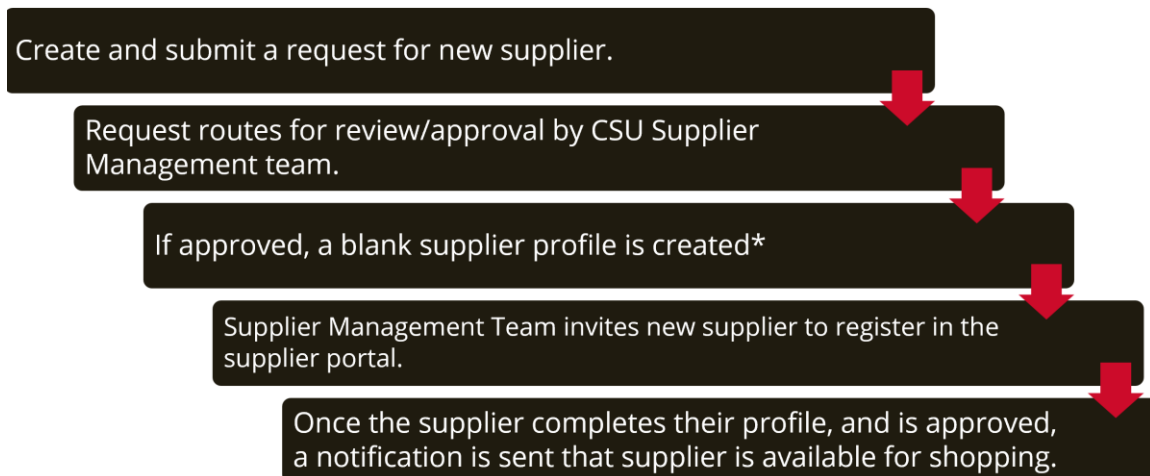
2000 characters remaining

Will the extension require additional addresses? ☐ Fulfillment ☐ Remit

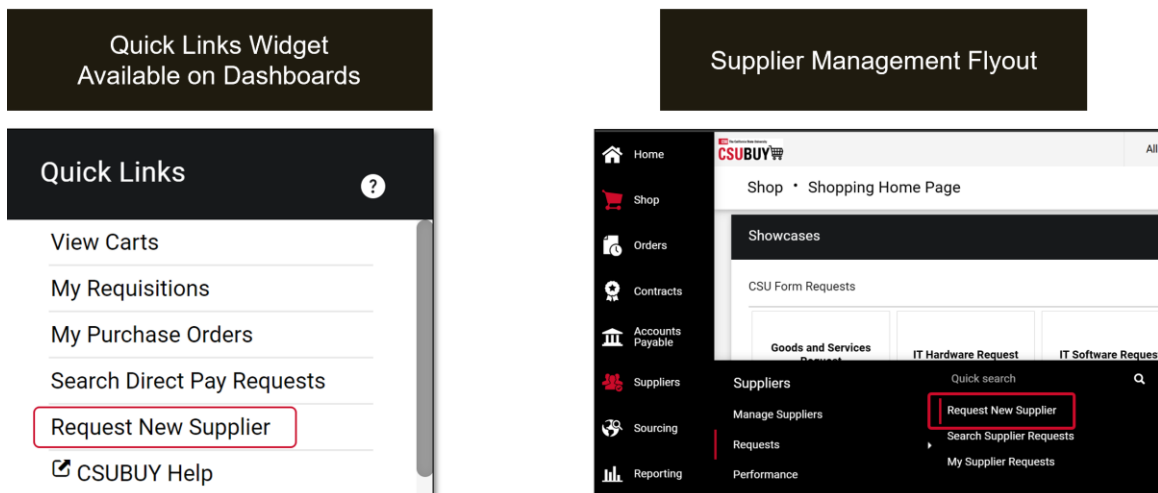
Fulfillment: Address where supplier would like to receive the Purchase Order

Remit: Address where supplier would like to checks to be sent.

Request a New Supplier: Process



Request for a New Supplier: Two Ways to Get There



The new supplier creation process begins by entering the supplier’s name and clicking Submit to launch the request form.

Request New Supplier

Supplier request form

CSU New Supplier Request

Supplier name ★

Submit

Navigation in Search Supplier

Building and saving a supplier search or report allows users to quickly access frequently used data, streamline analysis, and support ongoing tracking or decision-making without reapplying criteria each time.

The screenshot shows the CSUBUY Search Suppliers page. Numbered callouts point to various features: 1. Quick Filters/Saved Searches (left sidebar), 2. Network Status (top filter), 3. Active for Shopping Status (top filter), 4. Quick Search (top search bar), 5. Add Filter (top button), 6. Save Search (top button), 7. Configure Column Gear (top button), 8. Registration Status (table column header).

1. Quick Filters/Saved Searches

2. Network Status

3. Active for Shopping Status

4. Quick Search

5. Add Filter

6. Save Search

7. Configure Column Gear

8. Registration Status

Supplier 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"

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

15-HISTORY AND RESOLVING RETURNED REQUISITION

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

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	Lindsav		Change Request Created				Update tax code.

Information include 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		
<div> <div>Draft Carts</div> <div>Assigned Carts</div> </div>		
Filter Draft Carts		
Type	Cart Number	Shopping Cart Name
Normal - Returned	4429672 Active	2025-12-10 ccamptest 01
Normal	4429709	2025-12-10 ccamptest 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.

Requisition • 4429672

Summary

Taxes/S&H

PO Preview

Comments

Attachments

History

Start date

mm/dd/yyyy

End date

mm/dd/yyyy

Action

User

Filter

Clear All Filters

Export CSV

1-11 of 11 Results

20 Per Page

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_LGLED I Show less

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

CHAPTER 3: MAKING CHANGES BY SHOPPER/REQUESTER

1-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. If a change needs to be made after the shopping cart has been submitted, you will need to submit a **Change Request** (refer to Section 3 & 4)

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.

97 Items	...	<input type="checkbox"/>
Ken's Catering · 95 Items · 4,750.00 USD	→	... <input type="checkbox"/>

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

The screenshot shows a shopping cart header for 'Ken's Catering' with 95 items and a total of 4,750.00 USD. Below the header, there is a section for 'CA State University Long Beach (LBXMP-1)' with details like Contract, Supplier, Account, and Quote number. A dropdown menu is open, showing options like 'Add to Favorites', 'Remove Selected Items', and 'Change Supplier', which is highlighted with a red box. A red arrow points to the dropdown carrot next to the checkbox.

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.

The 'Change Supplier' dialog box has a search bar labeled 'Select Supplier' with a magnifying glass icon. Below the search bar, there is a '★ Required fields' section. At the bottom right, there are 'Save' and 'Close' buttons.

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.

The screenshot shows a shopping cart header for 'Steller Services' with 2 items and a total of 6,500.00 USD. Below the header, there is a section for 'CA State University Long Beach (LBXMP-1)' with details like Contract, Supplier, Account, and Quote number. A table lists line items, including 'Hospitality Request (non-travel)'. A red arrow points to the dropdown menu next to the item, which is highlighted with a red box.

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

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)					

- 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
- 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

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 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	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

1

Logout

Shop > Shopping > View Forms

[Back to Requisition](#)

Hospitality 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 Hospitality (non-travel). Examples are:

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

You have now been redirected back to the request form.

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).

Back to Cart

6

Hospitality Request (non-t...

Form Number 1213273

Purpose Procurement Request

Status On Document

Instructions

Suppliers

Form Fields

General Information

Cost Details

Review and Submit

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

Taxable Yes

Catalog No.

Commodity Code 158001 - Catering Services

5

Save Progress

Your cart will update with the new amount 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

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.

78 Items

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

^

SUPPLIER DETAIL...

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
<div>Hospitality Request (non-travel)</div>						

Add to Favorites

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

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
<div>Hospitality Request (non-travel)</div>						<div>1</div> <div></div>

Contract:

no value

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

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
	Hospitallity Request (non-travel)					

Context Menu 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
- Remove Requires Sourcing

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

Add Favorite

Edit Item Details

Item Nickname ★

Description

Rename your favorited line items for quick reference

500 characters remaining

Select Destination Folder

Personal

Favorites

Shared

You have no shared favorites.

★ Required

Save Changes Close

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 carrot next to the checkbox and select **Move to Another Cart**.

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

78 Items 1 Stacey Teodoro

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

^ SUPPLIER DETAIL... 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)						
Contract: Select price or contract...						
1	lunches for summer picnic Procurement Request: Hospitality Request (non-travel)		EA	50.00	Qty: 76 EA	3,800.00

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
- Add to PO Revision
- Change Commodity Code
- Requires Sourcing
- Remove Requires Sourcing

1

2

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

1

→

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Open My Active Shopping Cart

View Carts

View My Orders (Last 90 Days)

3

←

2

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

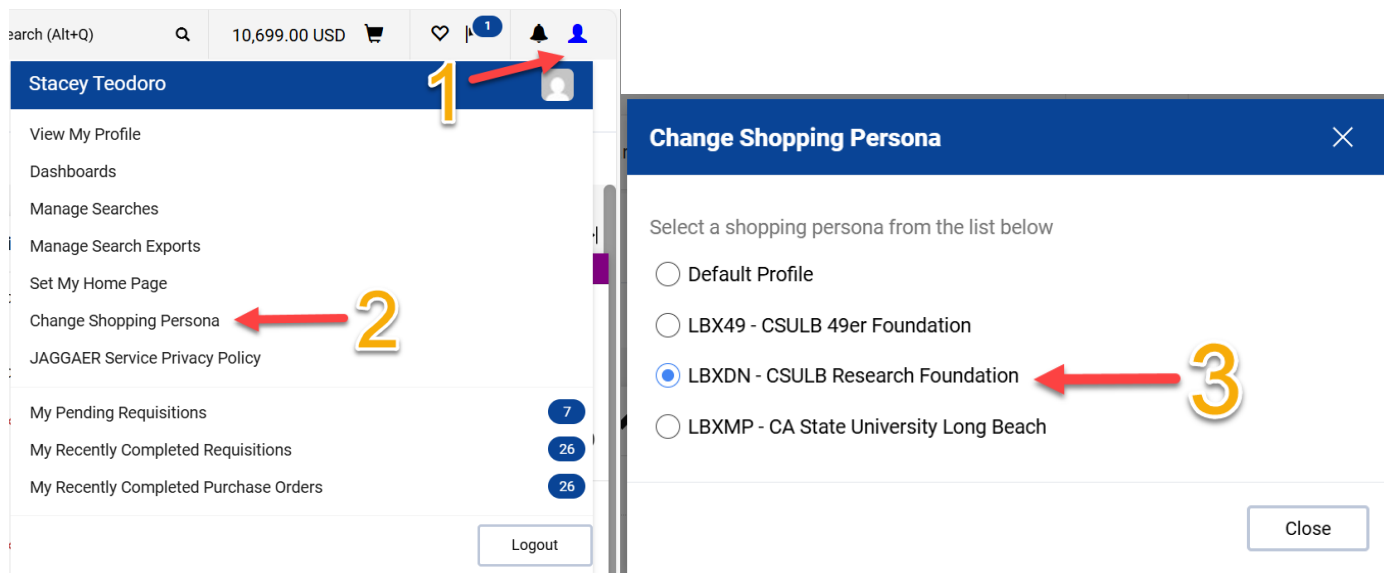
2-CHANGING PERSONAS IN A SHOPPING CART

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

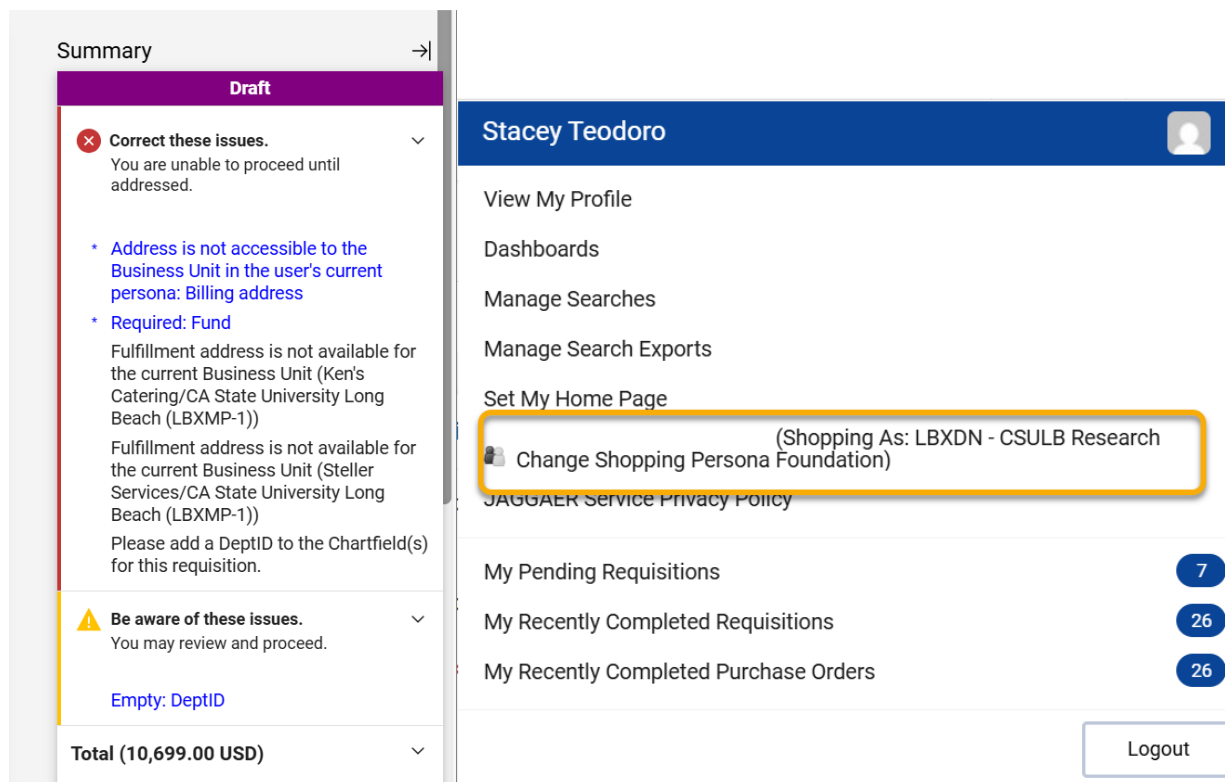
- LBXMP – CA State University Long Beach
- LBX49 – Long Beach State Foundation
- LBXDN – CSULB Research Foundation

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

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.



3-CHANGE REQUEST FOR CHARTFIELD AND ITEMS ON THE PO

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

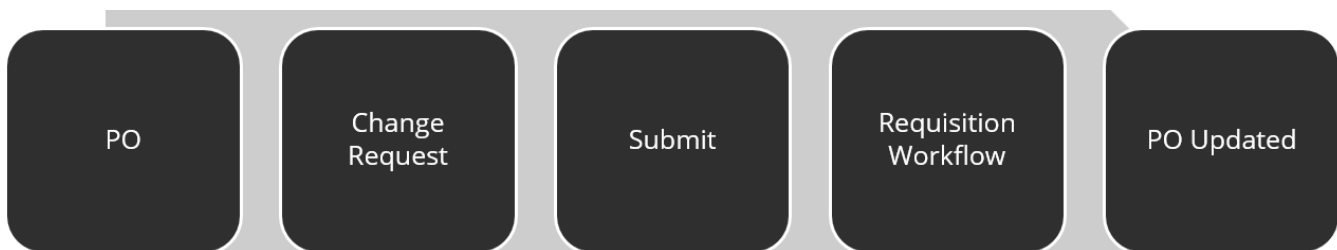
1. Chartfield
2. Dollar, Quantity, Product Description of Items on a PO

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 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 a closed status.

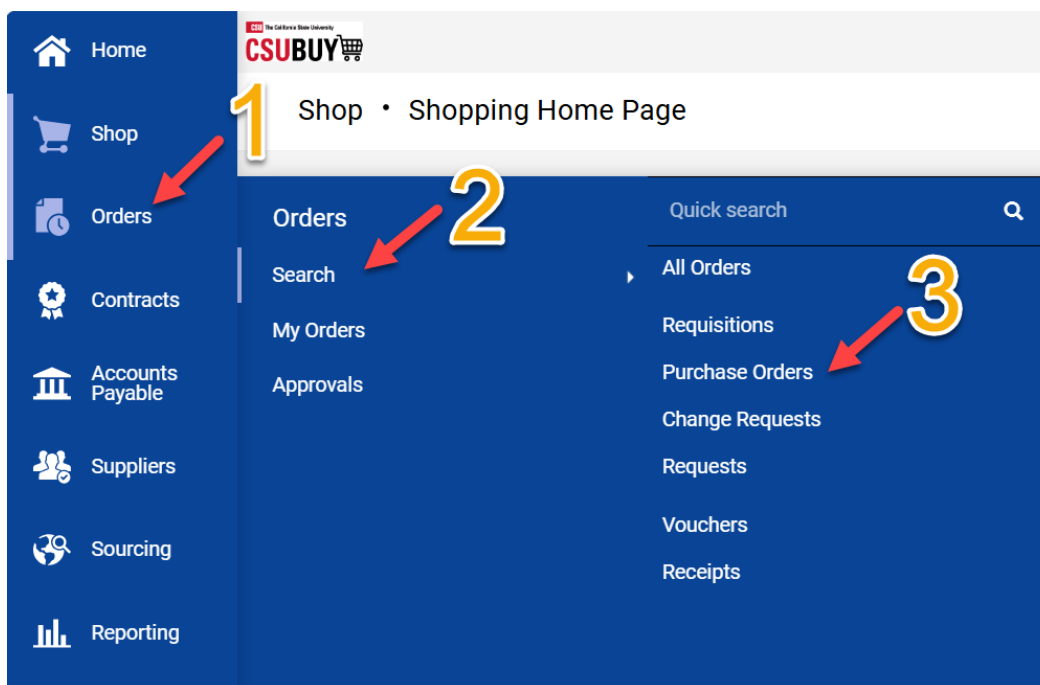
A Change Request CANNOT be made for Punchout Supplier Purchase Orders.

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, 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.

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.

CSUBUY

Orders Search Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search

Page 1 of 2 1-200 of 328 Results

PO Number Supplier Created Date/Time PO Status Matching Status Total Amount

240006291T	BD Biosciences, Inc	12/2/2025 1:21:04 PM	Completed	4424346	Mel(MaryEllen) Castillo	Sent To Supplier	No Matches	63,401.95 USD
240006290T	Harry's Handyman Service	12/2/2025 1:18:04 PM	Completed	4424345	Mel(MaryEllen) Castillo	Sent To Supplier	No Matches	500,000.00 USD
240006289T	Harry's Handyman Service	12/2/2025 1:16:02 PM	Completed	4424333	Mel(MaryEllen) Castillo	Sent To Supplier	No Matches	250,000.00 USD

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

CSUBUY

Purchase Order Acme Corporation 240006204T Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Voucher Comments

General Information Address Information PO Information

Transaction Details

Supplier Name Acme Corporation

Purchase Order No. 240006204T

Purchase Order Date 11/24/2025

Ship To

Attn: Minna Chang

CSU Long Beach - Receiving

1331 Palo Verde Ave

Long Beach, CA 90840-0005

United States

Deliver To

Accounting Date no value

FY Processing Options no value

PO Type no value

Amount-Only / X

Summary Details

Status of PO

Sent To Supplier

Supplier Acme Corporation

1 of 23 Results

- Add Comment
- Create Change Request
- Add Notes to History
- Finalize Revision
- Create Receipt
- Create Credit Memo
- Create Voucher
- Print PO
- Soft Close PO
- Cancel/Close PO

Here is a closer view of 5

Search (Alt+Q)

0.00 USD

1

2

- Add Comment
- Create Change Request
- Add Notes to History
- Add Discount
- Cancel PO
- Finalize Revision
- Create Receipt
- Create Credit Memo
- Create Voucher
- Print PO

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.

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s): **Add recipient**

- ☐ Mel(MaryEllen) Castillo (Prepared by) <maryellen.limcastillo@csulb.edu>
- ☒ Minna Chang (Prepared for) <minna.chang@csulb.edu>
- ☒ Stacey Teodoro (Approved Requisition) <stacey.teodoro@csulb.edu>

User with change request permission:

- ☐ Brian Odle (Approved) <Brian.odle@risenow.com>
- ☐ Chris Puente (Approved) <Chris.Puente@risenow.com>
- ☐ Hanna Osgood (Approved) <hanna.osgood@risenow.com>
- ☐ Jared Godfrey (Approved) <jared.godfrey@risenow.com>
- ☐ Owen Dougher (Approved) <odougher@calstate.edu>

add email recipient...

Change Request Reason

Create Change Request **Close**

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**

Create Change Request

add email recipient...

Change Request Reason

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.

Attach file to this change request (optional):

Attachment Type ☒ File ☐ Link/URL

File Name

Create Change Request **Close**

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/S&H 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

Performance End Date

more info...

Commodity Code 170003 / General Supplies

Tax Code LBC 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

Any changes made will be highlighted

Business Unit Fund DeptID Commodity CF Account Account Override Program Class Project

LBCMP GF001_LBCMP 00738_LBCMP 170003 660003_LBCMP no value no value no value no value

CA State University Long Beach CSU Operating Fund Financial Management General Supplies Supplies and Services

Change Requests • 4424603

Summary Taxes/S&H PO Preview External Communication

Resend to...

☐ Suppliers on Change Request

☒ ERP System Connections on Change Request

☒ CalState_PO.Export

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

Contract Name Request of PO-442 - CR

Business Unit Cal State San Marcos PDP (33400MP)

Ship To

Attn: Michelle Tanner

c/o Receiving

441 La Marlee Road

San Marcos, CA 92079

United States

Accounting Date no value

PO Type no value

Amount-Only / Blanket 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	...	
<div>ITEM DETAILS</div> <div> <div>Service Start Date</div> <div>Commodity Code</div> <div>115004 / IT Software</div> <div>Tax Code</div> <div>SMS</div> <div>San Marcos Sales Tax</div> </div> <div> <div>Service End Date</div> <div>Override Receiving Required</div> <div>×</div> <div>Taxable</div> <div>✓</div> </div> <div> <div>more info...</div> <div>Prepayment</div> <div>no value</div> <div>Asset</div> <div>×</div> </div> <div> <div>PO Clauses</div> <div>Add</div> <div>Asset Profile ID</div> <div>no value</div> </div> <div> <div>Work Order</div> <div>no value</div> </div>							
<div>CHARTFIELD</div> <div>Values have been overridden for this line</div> <div>✎</div>							
Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
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	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.

CSUBUY The California State University

Shop ▶ Shopping ▶ View Forms

◀ Back to Change Request

IT Software Request

Form Number **1061003**
Purpose **Procurement Request**
Status **On Document**

Instructions

Suppliers ✓
Form Fields ✓
General IT Software Infor... ✓
Information Security ✓
Additional Supplier Infor... ✓
Cost Details ✓
Review and Submit

Instructions

Utilize this form to init
This form should not l

- is for IT Hardw
- Is for general g
- Is for goods an
- Is a request for
 - Note: or
- Is for services

Note: A supplier mus

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

Please review your campus Procurement policy for any required quotes or documentation to accompany this Requisition.

IT Software or Maintenance Details

Software Details

Unit Price ★	100.00	USD	Quantity ★	100	Total	10,000.00 USD
Unit of Measure ★	EA - Each					
Product Description ★	testing smt tax 985 characters remaining					
Taxable	Yes					
Catalog No.						
Commodity Code ★	115004 - IT Software					

◀ Previous **Save on Change Request** Next ▶

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

CSUBUY The California State University

◀ Procurement Request • IT Hardware Request

Suppliers Form Fields 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

Prepared by Michelle Tanner

Prepared for Michelle Tanner

Buyer 68000117876
Michelle Tanner

Ad-Hoc Approver [Select](#)

Internal Notes and Attachments

Internal Note no value

Internal Attachments [Add](#)

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

Change Request number

4424603

Change Request status

Pending

Cart name

Test for Verify Receipt for Shopper - CR

Change Request date

12/3/2025

Change Request total

828.75 USD

Number of line items

1

Options

Print

Recent orders

Return to your home page

4-ADDING AND REMOVING A LINE ON A PO

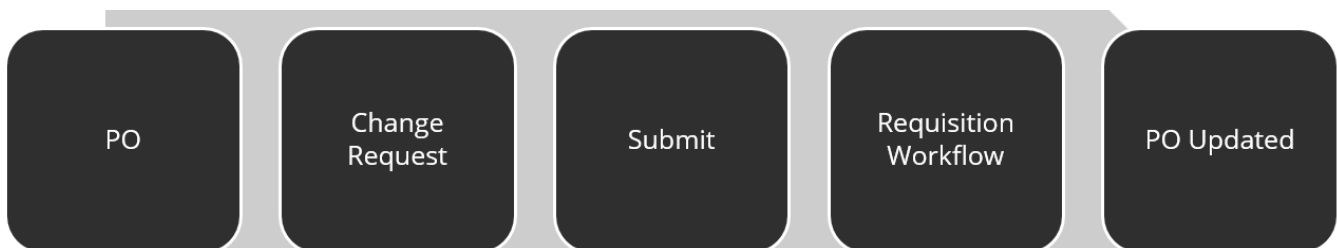
This section will focus on a Change Request adding and deleting a line on a PO. This means you are adding or removing items from the PO. The item to be added must have the **same Supplier** and the **same Form** as the other items on the PO. Please consider putting in another requisition instead as it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

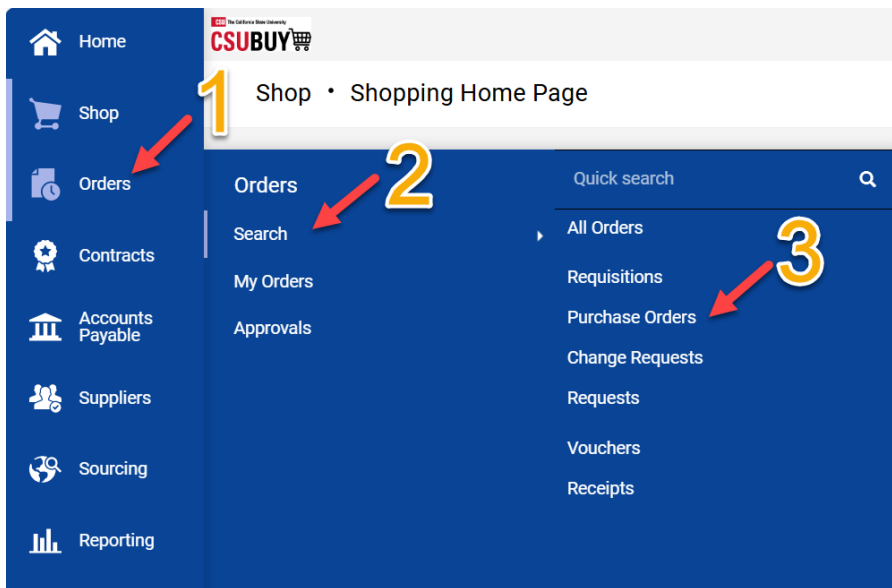
A Change Request CANNOT be made for Punchout Supplier Purchase Orders.

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.



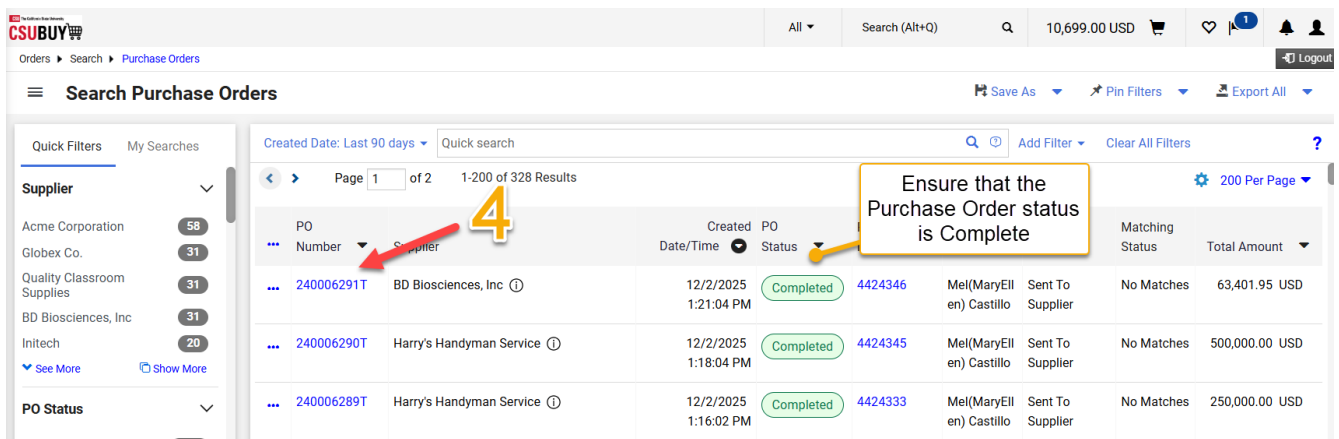
A Change ORDER is only done by Buyers and is different from a Change Request because it does not go through the requisition approval workflow process for the change.

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

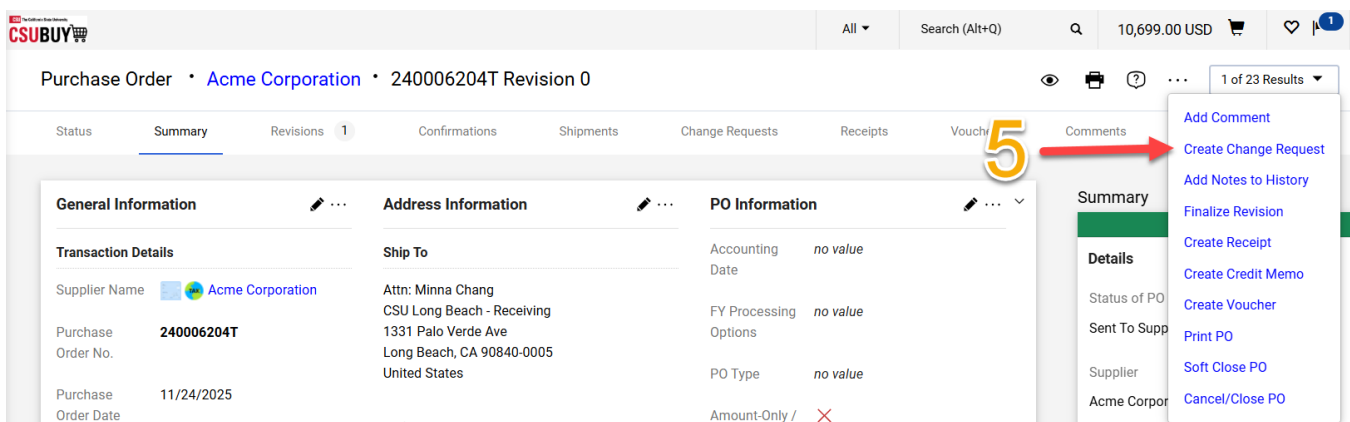


Search for the Purchase Order and select the PO that needs a Change Request.

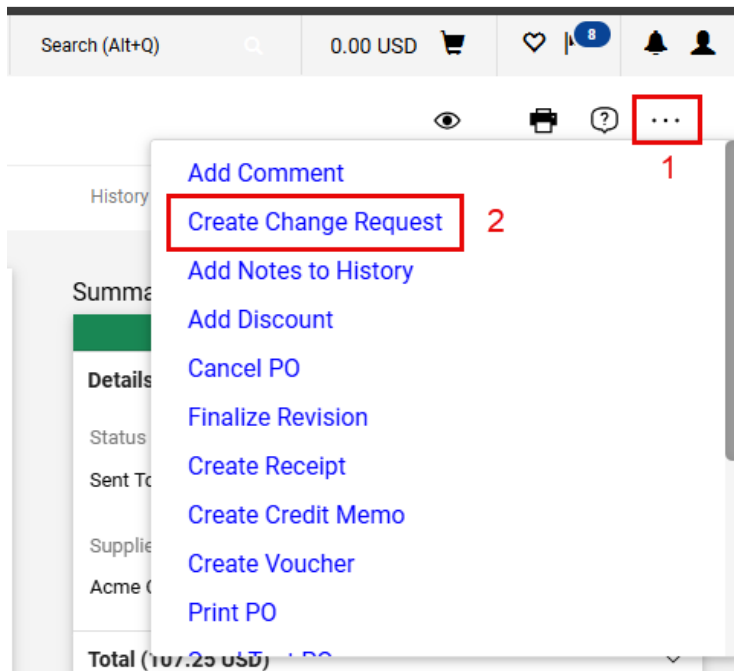
Verify that the Purchase Order's status is Completed. If the Purchase Order is pending, you may request the Buyer return the requisition to you.



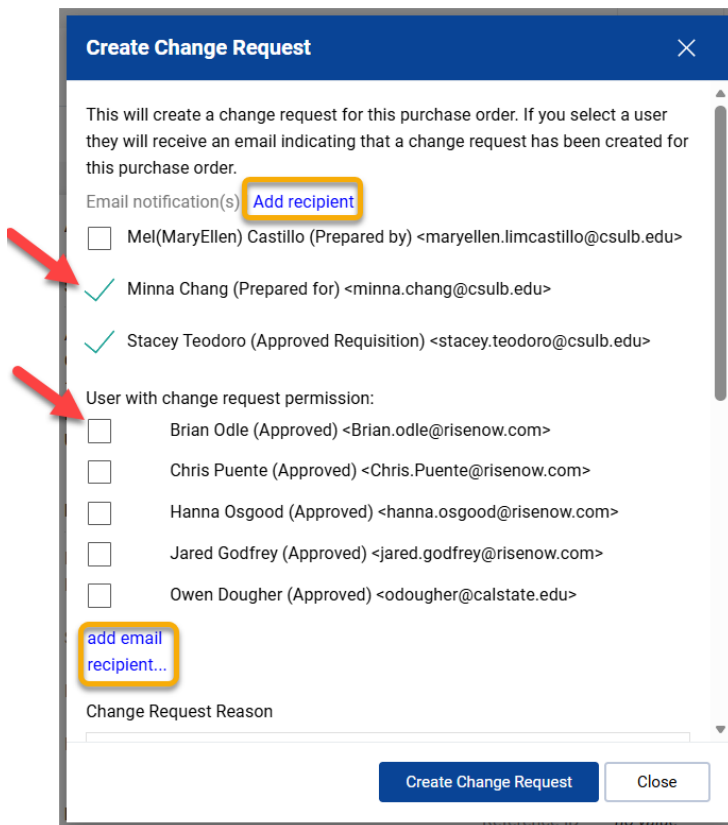
After finding the Purchase Order, click the three dots to the rights and select **Create Change Request** from the list.



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.

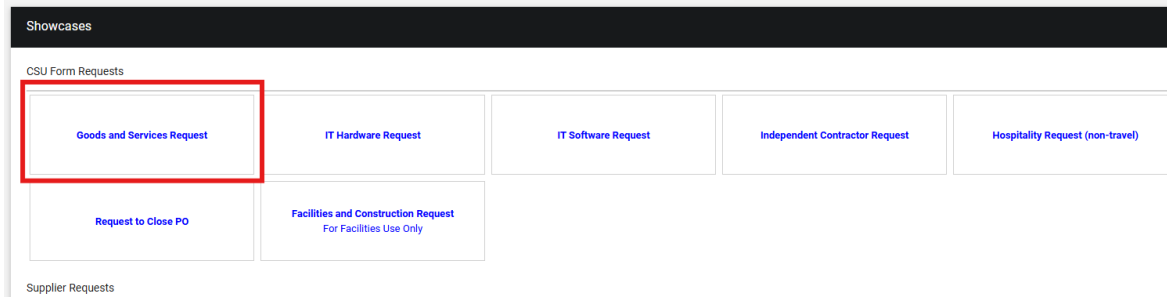
Click **Create Change Request**

The screenshot shows the 'Create Change Request' form. At the top, there are links for 'add email' and 'recipient...'. Below these is the 'Change Request Reason' section, which has a large text area. A yellow callout box with an arrow points to this area, containing the text 'Add reason for change request here'. Below the text area, it says '1000 characters remaining' and has 'expand' and 'clear' links. A note below 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 'Attach file to this change request (optional):' section. It has 'Attachment Type' with two radio buttons: 'File' (selected) and 'Link/URL'. Below this is a 'File Name' input field. A yellow callout box with an arrow points to this field, containing the text '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'.

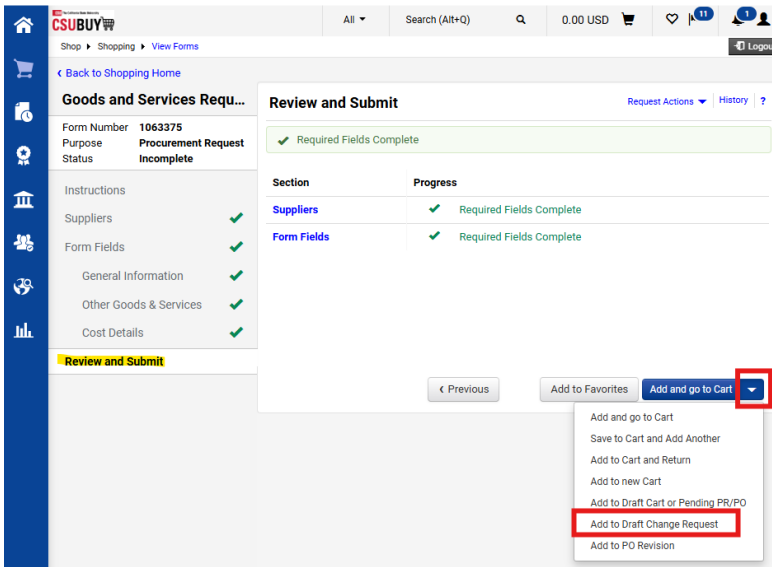
Make sure you note the Change Request number since you will need it in a later step. Then click on the Home icon in the flyout to return to the Shopping Home Page.

The screenshot shows the CSUBUY interface. On the left is a vertical navigation bar with icons. The top icon, a house, is highlighted with a red box. To the right of the navigation bar, the text 'Change Requests' is followed by the number '4206820', which is also highlighted with a red box. Below this, there 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 this is the 'Change Request Reason' section, which has a 'Reason' field containing the text 'Change requested to add a line for a service charge fee'.

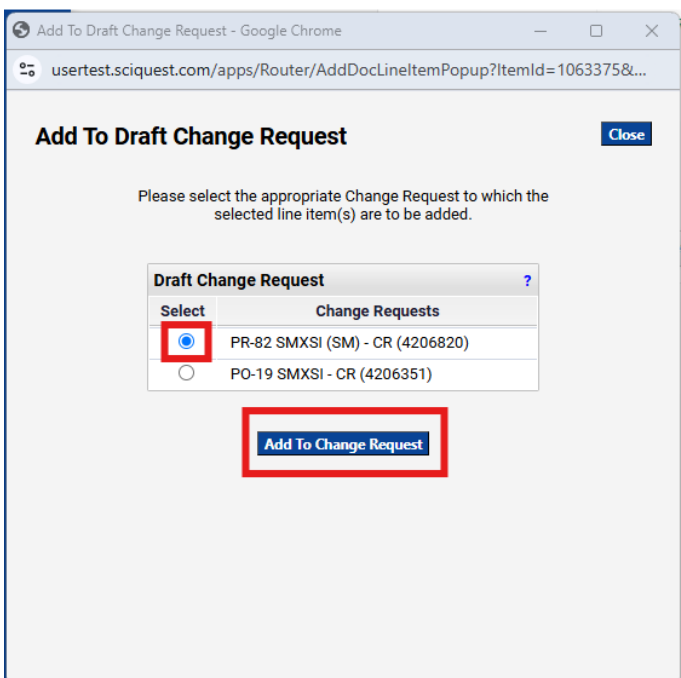
Find the Form for the item you are adding. Again, the Form must be the same Form as the other items on the PO. If it is not, you will receive an error message.



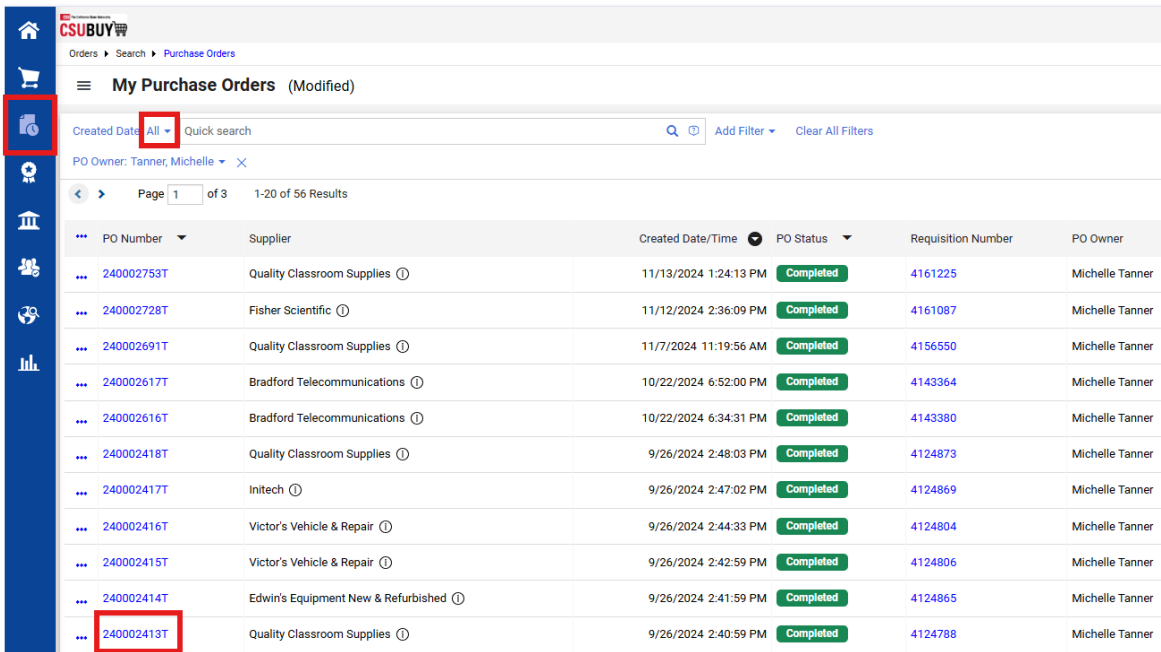
Complete the form fields. Once on the **Review and Submit** page of the Form, click on the drop down and select **Add to go to Cart** and then select **Add to Draft Change Request**.



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.



CSUBUY

Orders ▸ Search ▸ Purchase Orders

My Purchase Orders (Modified)

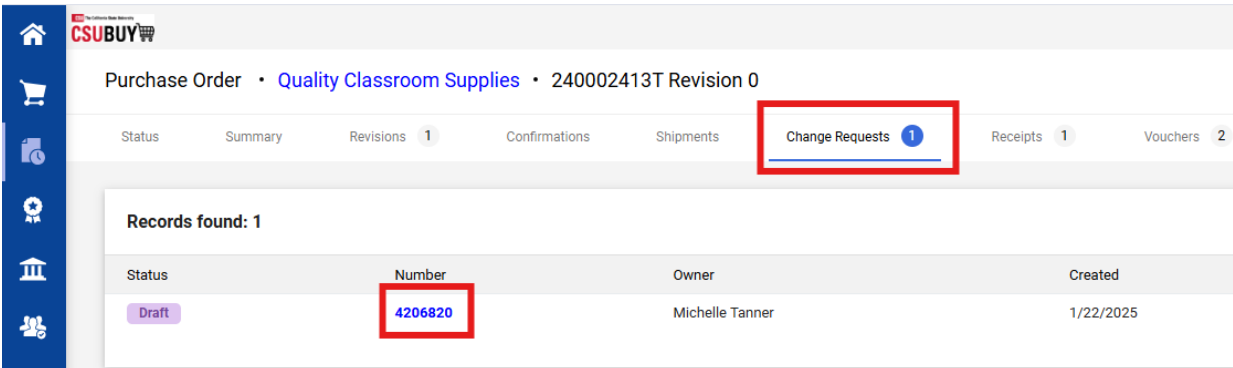
Created Date: All ▾ Quick search Q Add Filter ▾ Clear All Filters

PO Owner: Tanner, Michelle ▾ X

Page 1 of 3 1-20 of 56 Results

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.



CSUBUY

Purchase Order • Quality Classroom Supplies • 240002413T Revision 0

Status Summary Revisions 1 Confirmations Shipments **Change Requests 1** Receipts 1 Vouchers 2

Records found: 1

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.

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

Click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again. You may search 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 No.

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, Handling calculated and

The values shown for purposes, budget 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

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

Withdraw Change Request

Withdraw Change Request

5-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**.

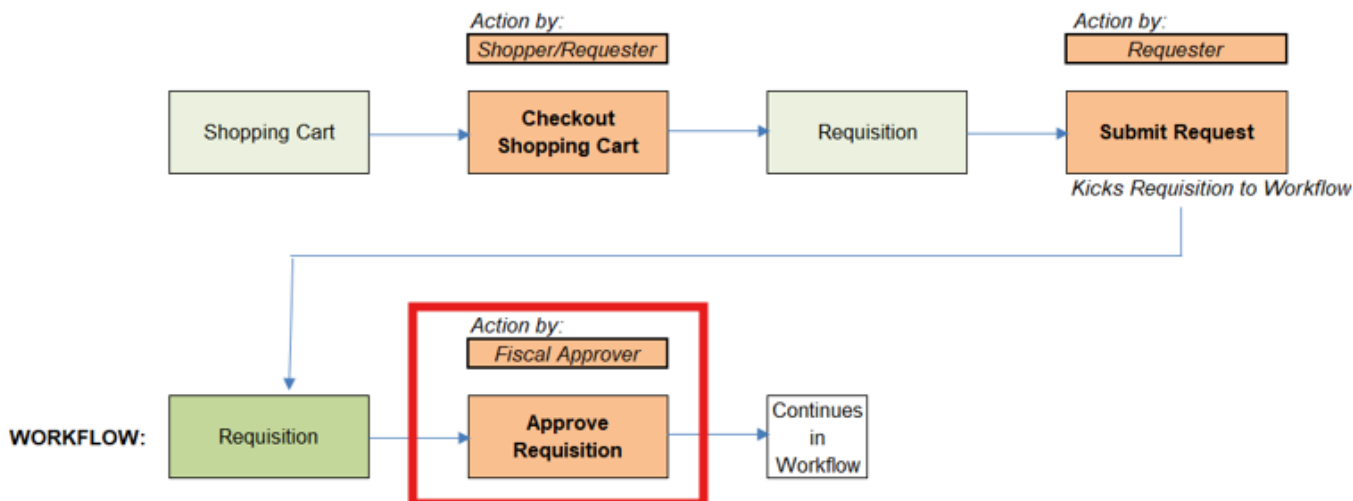
The screenshot shows the Requisition 3846591 interface. The 'Withdraw Entire Requisition' option is highlighted in the dropdown menu. The modal form for 'Withdraw Entire Requisition' is displayed, showing a warning message: 'Once a requisition is withdrawn, it cannot be reinstated. Click OK to withdraw, or CANCEL to leave the requisition unchanged.' Below this is a 'Reason' text area with a character limit of 1000. The modal also includes 'OK' and 'Cancel' buttons.

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

CHAPTER 4: FISCAL/DOA APPROVER

1-APPROVAL WORKFLOW FOR REQUISITION

The DOA/Fiscal 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 Fiscal/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 Fiscal/DOA Approvers; however, only one Fiscal/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.

1. Email

If you set up your notifications to receive an email if a requisition needs your approval, you will receive an email from CSUBUY. You can scroll all the way 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

Reply Reply All Forward

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

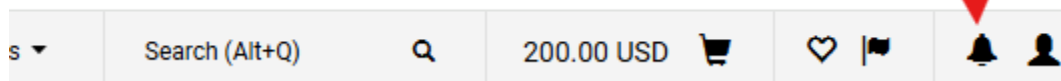
Attn: Mel(MaryEllen) Castillo
CSU Long Beach - Receiving
1331 Palo Verde Ave
Long Beach, CA 90840-0005
United States

[View Requisition Approvals](#)



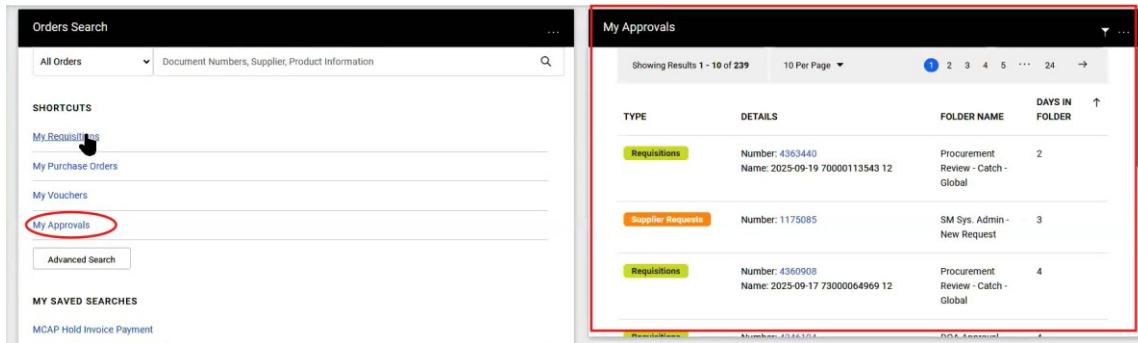
2. Notifications

You will be notified there is a requisition to be approved either by email or in CSUBuy notification bell alert.

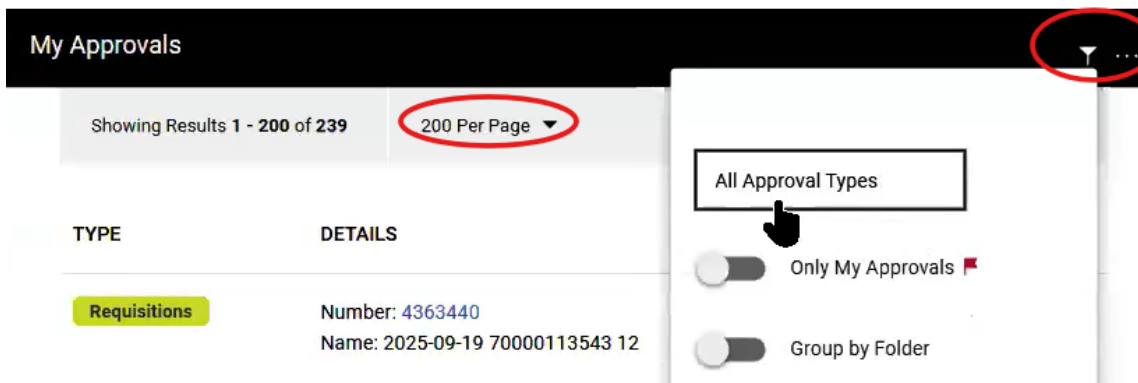


3. Home Page: My Approvals

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



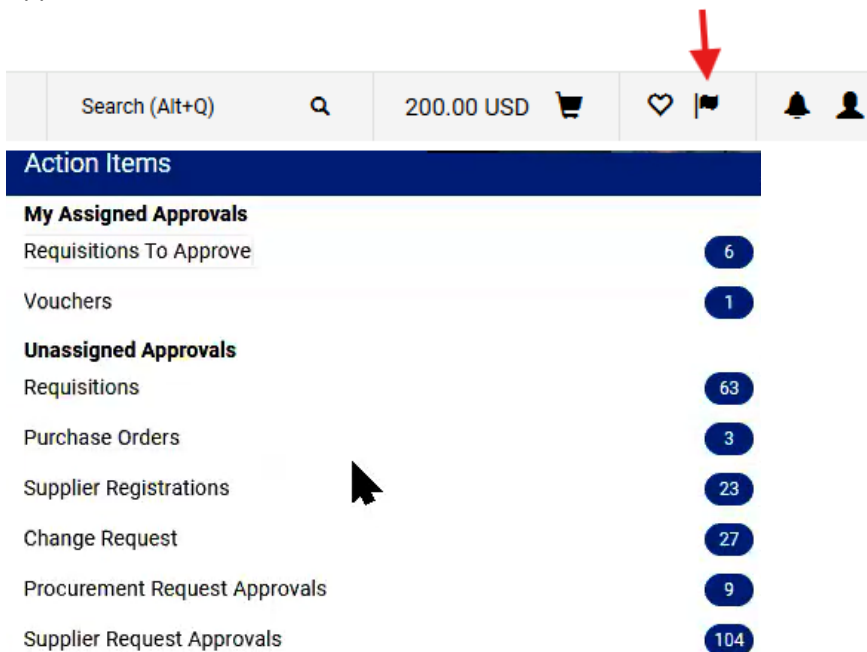
In My Approvals, adjust the number of documents to view per page and use the filter.
(See the Section on **Filtering My Approvals on Home Page** for more details.)



4. Home Page: Action Item Flag

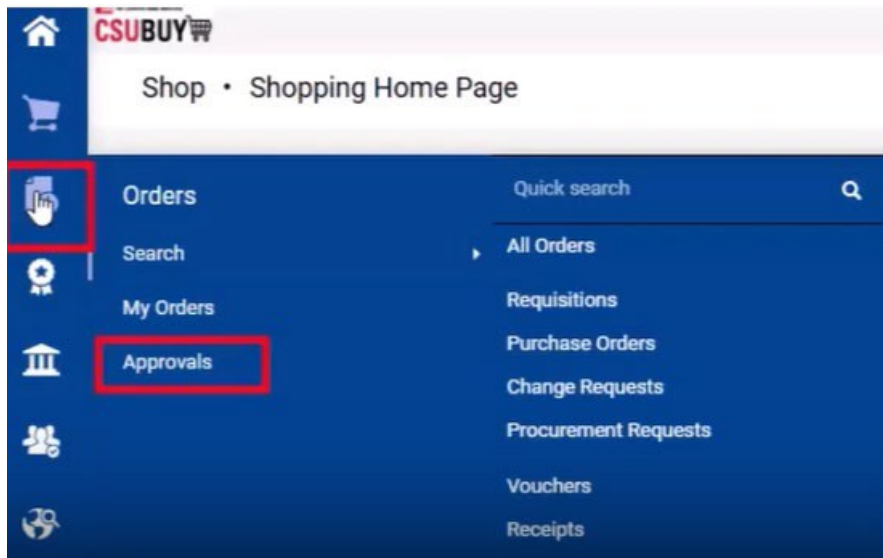
Click on the Flag on the Home Page to locate requisitions to approve.

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.



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

Approvals

Requisitions 1 | Purchase Order | Change Requests | Vouchers | Sourcing Events Evaluation | Sourcing Events | Procurement Requests | Contract Requests | AP Requests

Your Selections

Date Range: All Dates

Assigned Approver: Barbara Buyer

Filters

- SUPPLIER**
 - Jackson Hardware Supply (2)
- SUPPLIER CLASS**
 - CA Supplier (2)
 - Check Supplier (2)
 - Select Multiple C2
- BUSINESS UNIT**
 - Cal State San Marcos P2P (SMXMP) (2)
- CURRENT WORKFLOW STEP**
 - Procurement Review (1)

MY PR APPROVALS 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
4106344	Jackson Hardware Supply	Barbara Buyer	9/4/2024 4:14 PM	Lindsay Swensen	20,377.50 USD

1 Requisition Name: PR 39 SMXMP
No. of line items: 2
Folders: 0 Days in folder [My PR Approvals]
28 Days in folder [San Marcos - Commodity - Supplies]

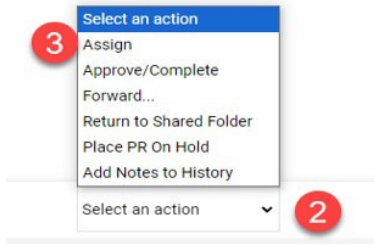
SAN MARCOS - COMMODITY - SUPPLIES 1

3 select an action
Assign
Approve/Complete
Forward...
Return to Shared Folder
Place PR On Hold
Add Notes to History

2 Select an action

1 ITEMS SELECTED

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

DEPTID: 00738_LBCMP (FINANCIAL MANAGEMENT): (0.00 - 5,000.00) USD 1						
<input type="checkbox"/>	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
<input type="checkbox"/>	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

Home
Shop
Orders
Contracts
Accounts Payable
Suppliers
Sourcing
Reporting

All
Search (Alt+Q)
0.00 USD

Requisition • 211476131

Assign & Further Actions
1 of 1 Results

Summary
Taxes/S&H
PO Preview
Comments
Attachments
History

General Information
Address Information
PO Information

Transaction Details
Status: Pending
Cart Name: 2026-01-26 40000326311 01
Business Unit: LB - CA State University Long Beach P2P (LBXMP)
Submitted: 1/26/2026 4:21 PM

Ship To
Attn: Mel(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 Broman Hall
Ship Via: Best Carrier-Best Way

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

Summary
Pending
Total (2,500.00 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: 2,500.00
Sales Tax: 0.00
Use Tax: 0.00
Shipping: 0.00
Handling: 0.00
2,500.00

Requisition Approval Queue View of Assigned and Unassigned

Approvals
Requisitions 2
Change Requests
Vouchers

Date Range: All Dates

Suppliers:
AAA Flag & Banner Mfg Co Inc (2)
Supplier Not Known (1)

Supplier Class:
Check Supplier (2)
CA/Local Supplier (2)
Internally Managed Supplier (1)

MY PR APPROVALS 1

DEPTID: 00732_LBCMP (CMS FINANCIAL SERVICES): (0.00 - 5,000.00) USD 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	ACTIONS
<input type="checkbox"/> 211648370	*Supplier Not Known	Not Assigned	1/29/2026 2:07 PM	Mel(MaryEllen) Castillo	1,657.50 USD	
Requisition Name: DOA TEST_STACEY, No. of line items: 1, Folders: 0 Days in folder [DeptID: 00732_LBCMP (CMS Financial Services): (0.00 - 5,000.00) USD]						

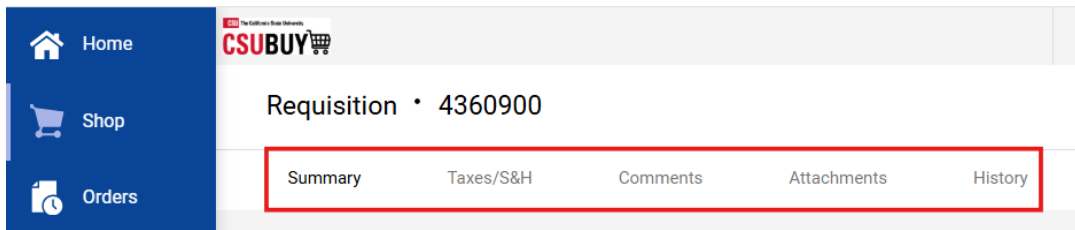
DEPTID: 00738_LBCMP (FINANCIAL MANAGEMENT): (0.00 - 5,000.00) USD 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	ACTIONS
<input type="checkbox"/> 211644640	AAA Flag & Banner Mfg Co Inc	Menna Chang	1/29/2026 1:24 PM	Mel(MaryEllen) Castillo	2,210.00 USD	
Requisition Name: DOA TEST_MINNA, No. of line items: 1, Folders: 0 Days in folder [My PR Approvals], 0 Days in folder [DeptID: 00738_LBCMP (Financial Management): (0.00 - 5,000.00) USD]						

3-REVIEWING A REQUISITION FOR APPROVAL

The DOA/Fiscal Approver cannot make any changes to the Requisition EXCEPT, change the Chartfield, 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.

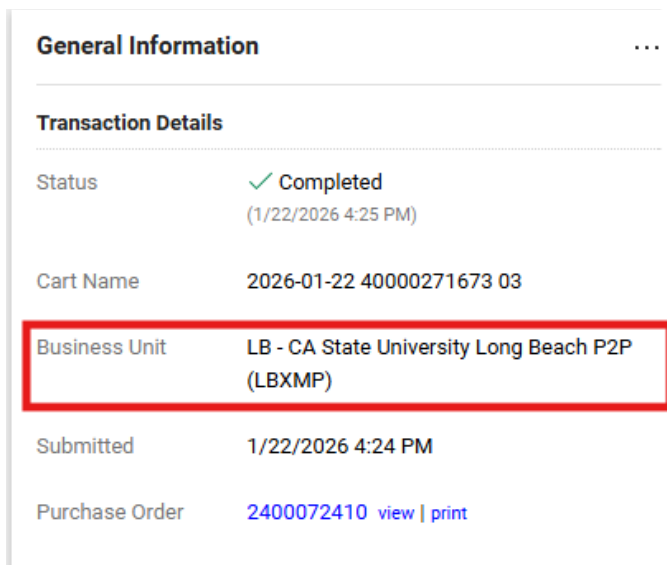


Summary

This is the most important section to review.

General Information

Make sure the Business Unit is correct.



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 to the AP Dept address

PO Information

PO Information

Accounting Date *no value*

PO Type *no value*

Amount-Only /
Blanket PO *✗*

Multi-Year PO *✗*

Reference ID *no value*

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
		Goods and Services Request					
Contract:		no value					
1	✓	Test Procurement Request: Goods and Services Request		BX	25.00	Qty: 30 BX	750.00 ...

You may 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 ✓

Form Fields ✓

- Request Information ✓
- Independent Contractor D... ✓
- Questionnaire ✓
- Cost Details ✓

Suppliers

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

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	✗
			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 trigger a requirement to 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.

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	no value	no value	no value	no value	

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, 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 for 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

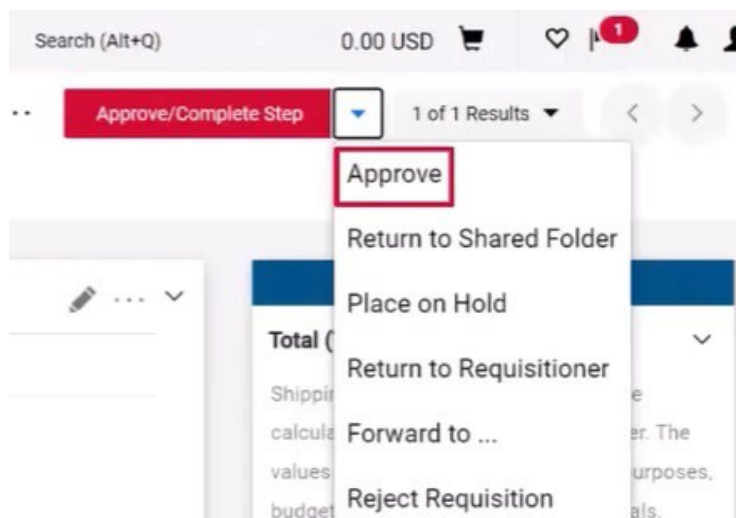
Once you locate the Requisition for your review, assign the Requisition to yourself and review the Requisition, there are multiple actions available for you to take as Fiscal/DOA Approver.



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:

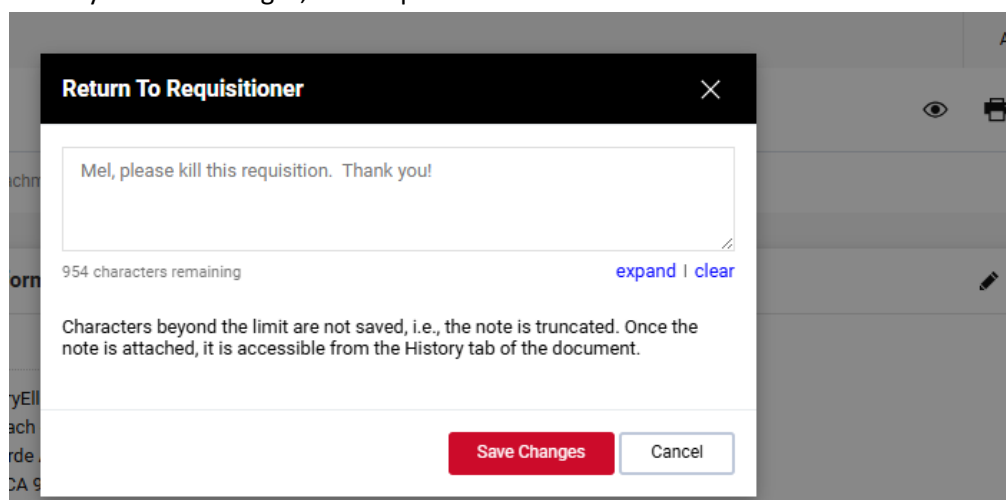
Approve: Everything looks good and completes the current step and authorizes it to proceed to the next step in the process.

Return to Share Folder: You unassign yourself and return the requisition to the share folder and allow access to other approvers. It is important to note that no notification occurs when this action is taken.

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 with 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 essentially kills the requisition so no further action can be taken on it.

- 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.

Other Additional Actions:

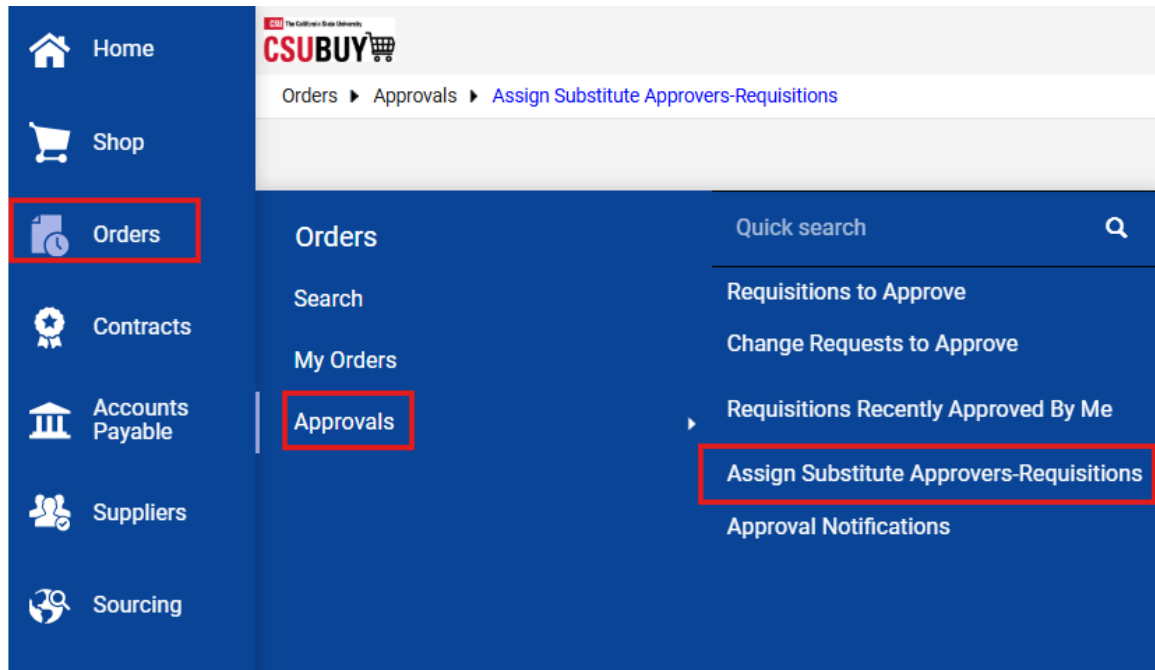
Ad-Hoc Approver: You may add another Approver, if needed. This action adds the approver in workflow after your approval step and does not replace you or return to your approval step. Please consider if adding a Comment would be sufficient for your needs since adding an Ad-Hoc Approver will slow down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

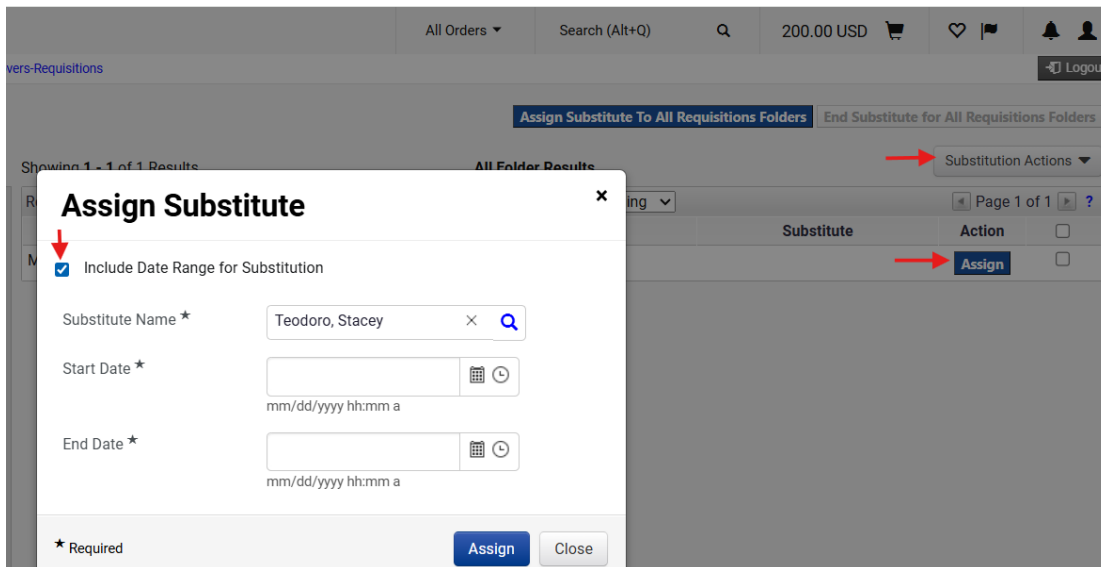
The screenshot displays the CSUBUY requisition system interface. At the top, the requisition number 4006091 is shown. Below this, there are tabs for Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The 'Other Participant Information' section is visible, showing fields for Prepared by, Prepared for, Buyer, and Ad-Hoc Approver. The 'Ad-Hoc Approver' field is currently set to 'Select'. A red arrow points from this field to the 'Ad-Hoc Approver' field in the 'Ad-Hoc Approver' pop-up window. The pop-up window has a title bar 'Ad-Hoc Approver' and a close button. It contains fields for Step Name (Ad-hoc 1), Ad-Hoc Approver (Type to filter...), and Comments (1000 characters remaining). There are 'Save' and 'Close' buttons at the bottom of the pop-up window.

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 same 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 change you could make on the Requisition is the following:

1. Chartfield. You will see the pencil, which means you may edit a field.

Requisition • 4336383

Summary Taxes/S&H PO Preview Comments Attachments History

BG Supplies Plus! • 251 Items • 251,000.00 USD

^ **SUPPLIER DETAILS** Cal Poly San Luis Obispo (SLXMP-1) : 123 Main Street, Lakewood, Ohio 44107 United States

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

Quote number *no value* PO Clauses *Add/View*

Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Goods and Services Request							
Contract: <i>no value</i>							
1		Big Time Consulting Services		EA	1,000.00	251	251,000.00

^ **ITEM DETAILS**

Performance Start Date *Commodity Code* 160008 / Professional Services *Tax Code* *no value*

Performance End Date *Receiving Required* *no value* *Taxable* X

more info... *Contains Discount* X *Asset* X

Prepayment *no value* *Asset Profile ID* *no value*

PO Clauses *Add/View* *Work Order* *no value*

^ **CHARTFIELD** Values have been overridden for this line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project

2. 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 don't 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:

Requisition • 3761916

Summary Taxes/S&H Comments Attachments History

General Information ... **Shipping Information** ... **Billing Information**

General Information

Values vary by line.

Ship To

Contact: Melissa Taylor
940 West 1st Street
Chico, CA 95929
United States

Delivery Information

Deliver To Location **KNDL210_CHICO**
Glenn Kendall Hall 210

Ship Via **Best Carrier-Best Way**

Due Date *no value*

Bill To

Accounts Payable
400 West 1st St.
Chico, CA 95929
United States

PO Details

Accounting Date *no value*

PO Type *no value*

Amount-Only / Blanket PO X

1 of 1 Results

Copy to New Cart
Add Comment
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

Choose File

Upload your file

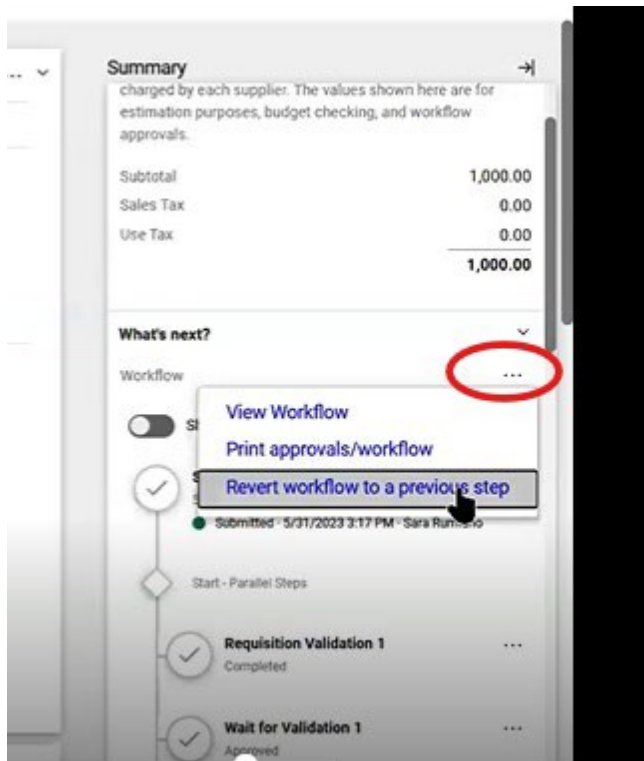
No comments have been added

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.

Requisition • 4323932

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

Records found: 0 Show comments for Requisition +

ADD COMMENT **2**

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) <bcbfprq@calstate.edu>

Attach file (optional)

Attachment Type

☒ File

☐ Link/URL

File Name

File

Choose File Upload your file

4 ✓ ✕

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

Requisition **211476131** All Orders ▾

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

Start date End date User Filter Clear All Filters Export CSV

mm/dd/yyyy mm/dd/yyyy Action

1-18 of 18 Results 20 Per Page ▾

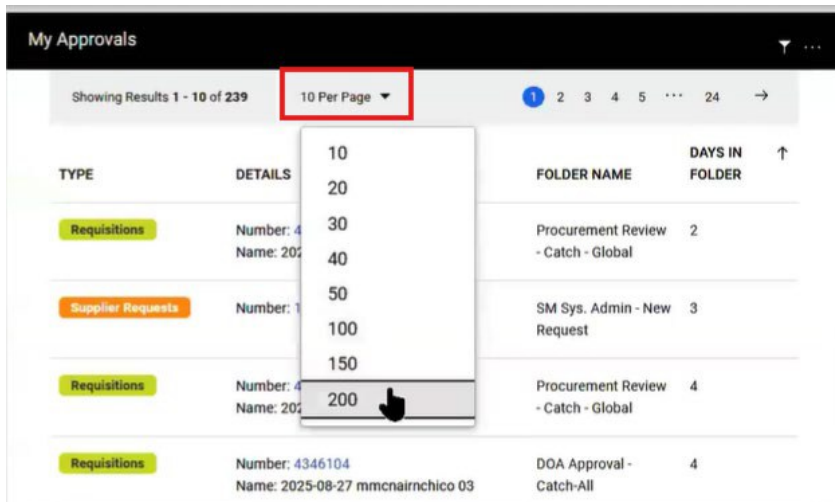
Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	1/26/2026 5:03:47 PM	Minna Chang	DOA Approval - DeptID	Requisition returned		Minna Chang	Mel(MaryEllen) Castillo	Mel, please kill this requisition. Thank you!
	1/26/2026 4:58:29 PM	System		Successful use tax callout to tax engine.	Sales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

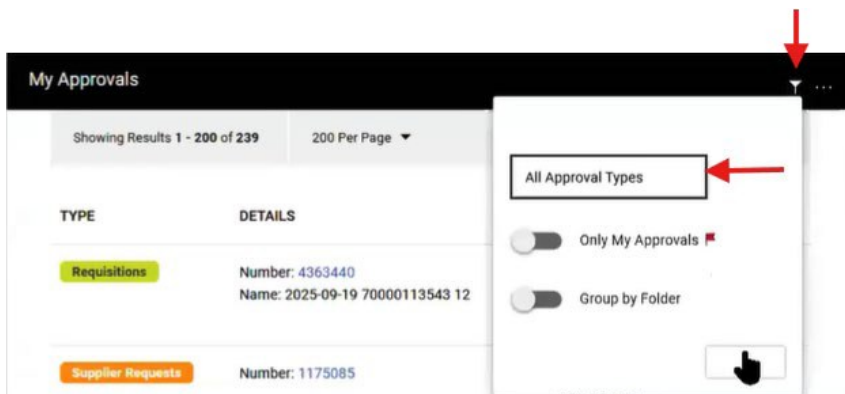
Number of Approvals on My Approval

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

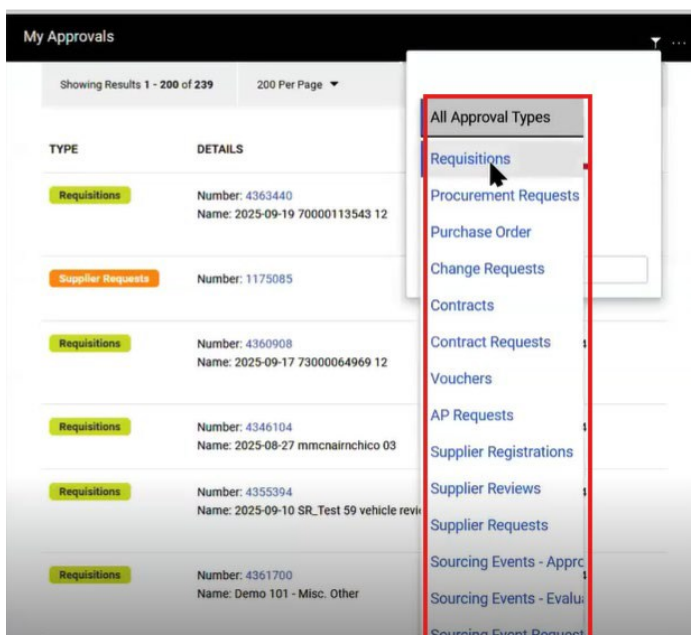


Filter for Type of Approvals

Use the filter icon and click on the box



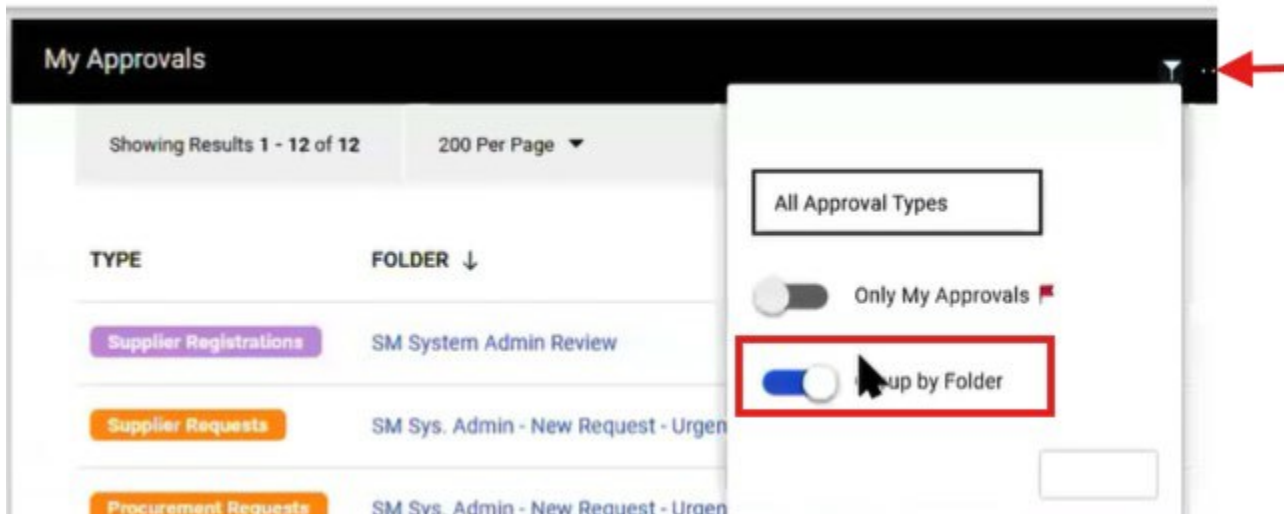
Select the type of approvals you would like to see:



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.



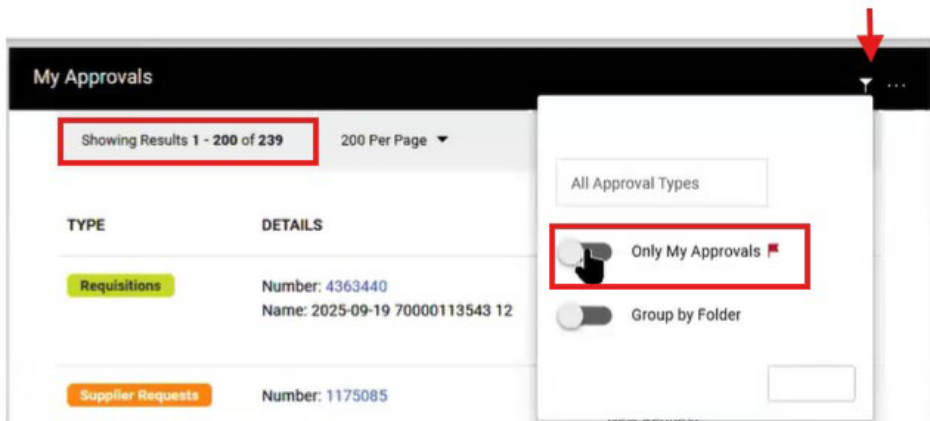
You will see that you can now filter by Folder.

The screenshot shows the 'My Approvals' interface with the 'Group by Folder' filter applied. The table has columns: 'TYPE', 'FOLDER', 'TOTAL', 'ASSIGNED TO ME', 'OTHER', and 'NONE'. The 'FOLDER' column is highlighted with a red box. The table lists various approval types grouped by folder.

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 approval 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 12 items assigned to you.

My Approvals					
Showing Results 1 - 12 of 12		200 Per Page			
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

Printer icon

Voucher: C003515T

Printer icon

Navigation Menu Search

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

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

CSUBUY

All

Search (Alt+Q)

0.00 USD

Shop • Shopping Home Page

Organization Message

Welcome CSU Office of the Chancellor to Procure-to-Pay (P2P) in CSUBUY!
Your Chancellor's Office P2P Project Team, along with the CSUBUY Core Project Team, have worked extremely hard to build and launch CSUBUY P2P for everyone. As you begin using the application, you may experience technical difficulties, and we ask for your patience and understanding during this time. Please report issues to the Chancellor's Office Project Team by emailing CSUBUY-CO@calstate.edu. To support you through the initial go-live, in partnership with your Project Team, we will conduct Hypercare Office Hours to get your questions answered in real time.
Office Hours will be:
Tuesday through Thursday 10:00 am – 11:00 am via [Zoom](#) (beginning November 19th)
For more information, including upcoming live training sessions, pre-recorded training sessions and training materials, please visit [Procure-to-Pay \(P2P\) | California State University, Office of the Chancellor](#)

Quick Links

[View Carts](#)
[My Requisitions](#)
[My Purchase Orders](#)
[Search for Supplier](#)
[Request New Supplier](#)
[CSUBUY Help](#)

Shop

Simple Advanced

Go to: Favorites Browse: Suppliers Categories Contracts

Advanced Search Everything

Find Results That Have:

All of These Words

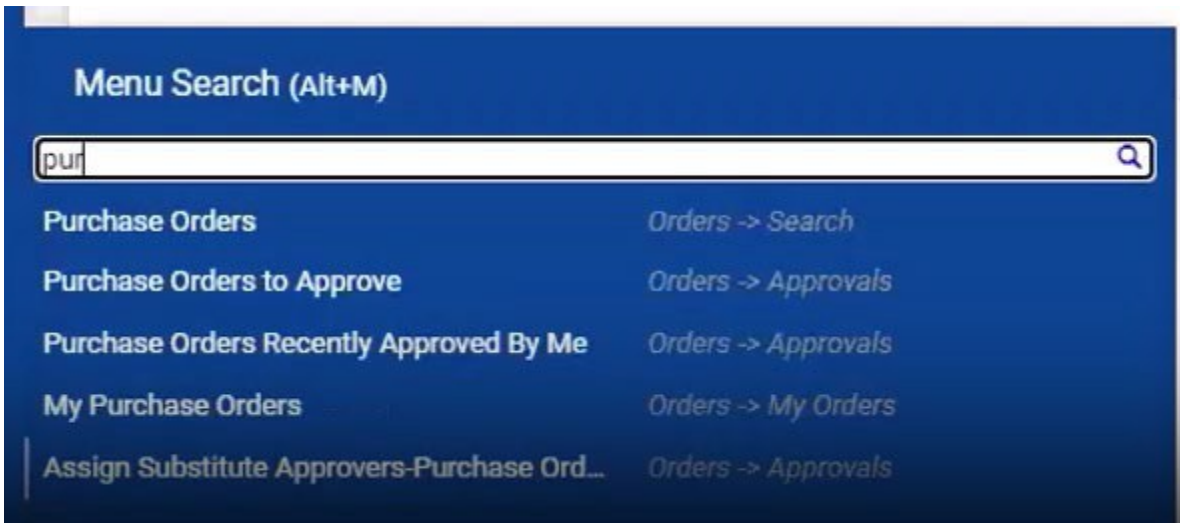
Supplier

Part Number (SKU)

Manufacturer Name

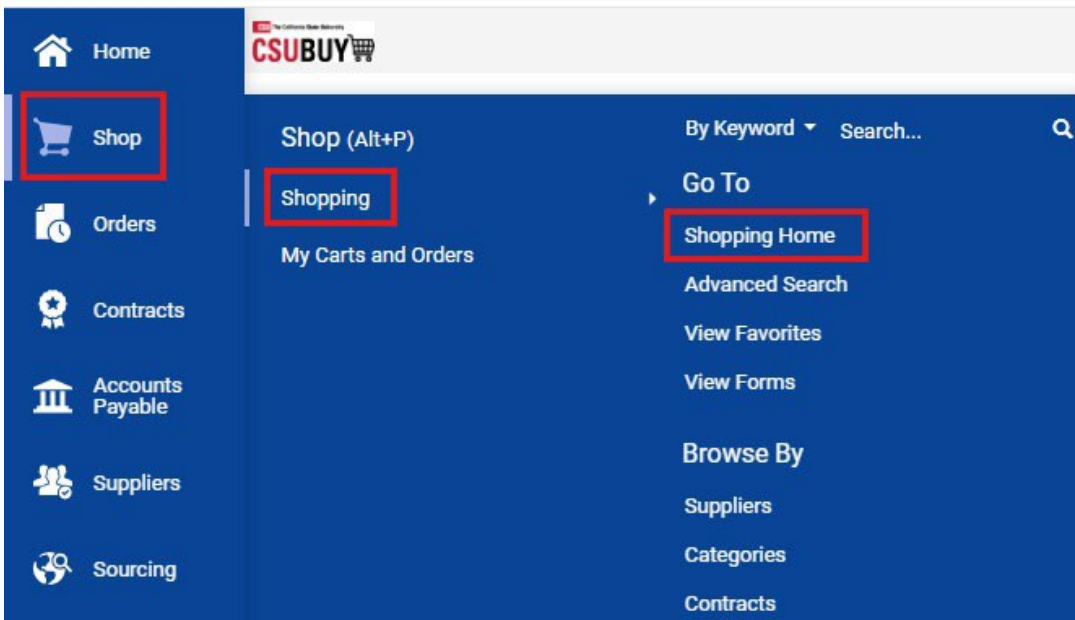
Menu Search (Alt+M)

Menu Search

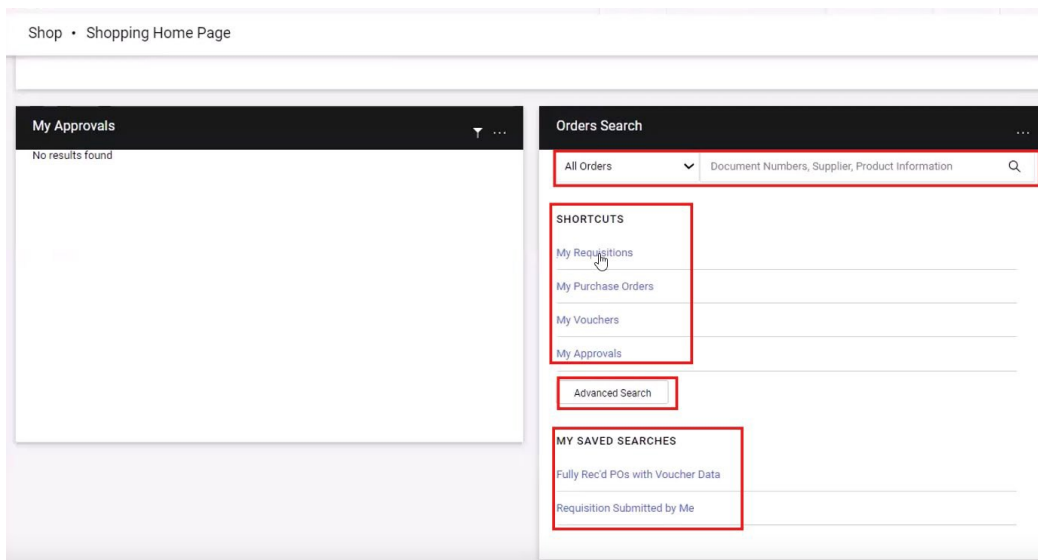


Order Search on the Shopping Home Page

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.

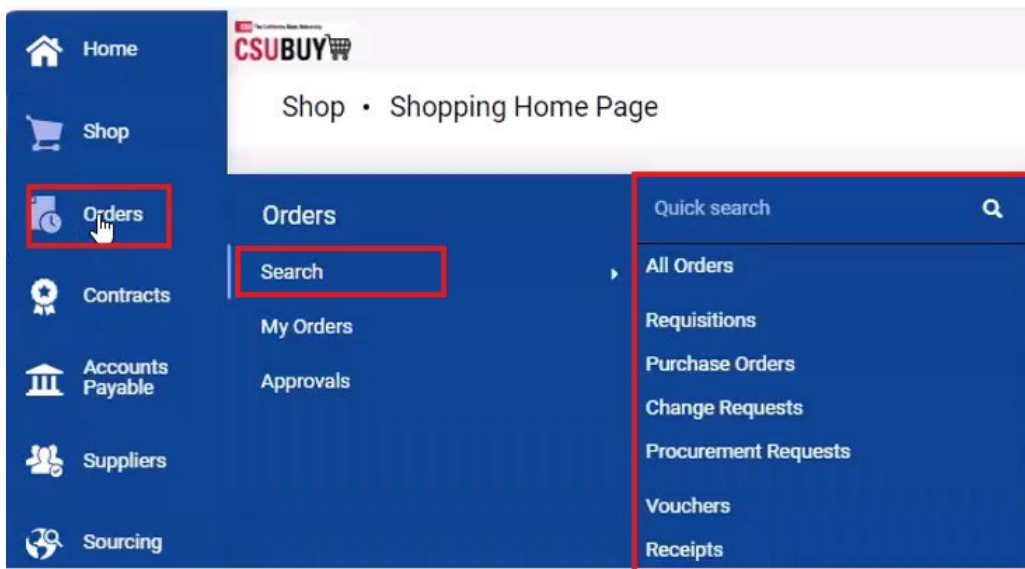


1. The top section with a drop-down menu allows you to search based on specific information including individuals with roles in CSUBuy.
2. **Shortcut** – Search for specific types of documents in which **you are the owner**.
3. **Advanced Search** – Clicking on this takes you to All Orders search results 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 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)

CSUBUY

Orders ▸ Search ▸ Purchase Orders

Search Purchase Orders

Created Date: Last 90 days ▾ Quick search

Page 1 of 3 1-100 of 289 Results

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.

CSUBUY

Orders ▸ Search ▸ Purchase Orders

Search

Quick Filters

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

Created Date: Last 90 days ▾ Quick search

Page 1 of 3 1-100 of 294 Results

PO Number Supplier

240005963T Wire Supplier ⓘ

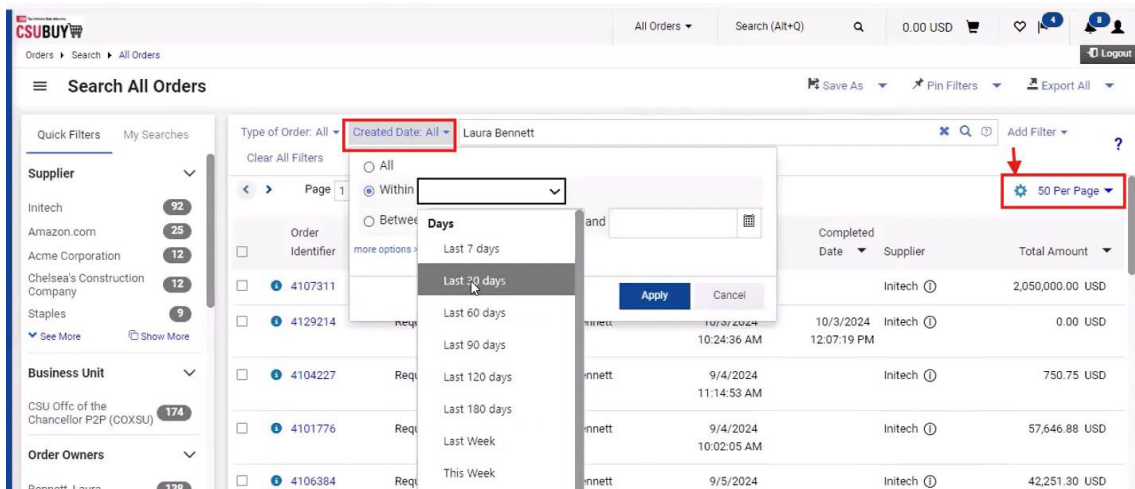
240005962T Wire Supplier ⓘ

2-FILTERING ORDER SEARCHES

When search results come up, you have the ability to filter the results to narrow down the results.

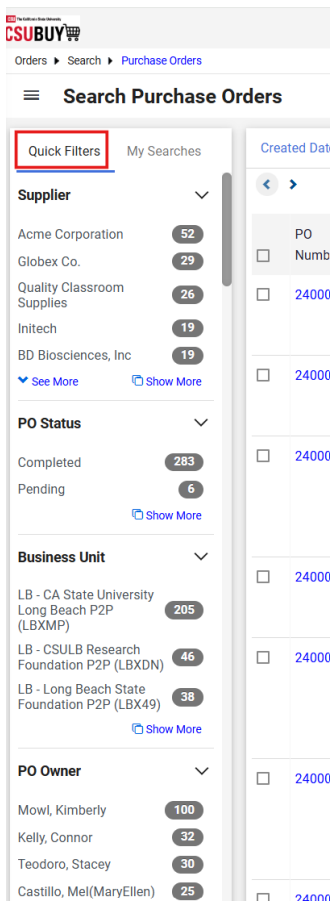
You may adjust the **number of results** you would like to see per page by clicking on the gear and selecting number per page.

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.



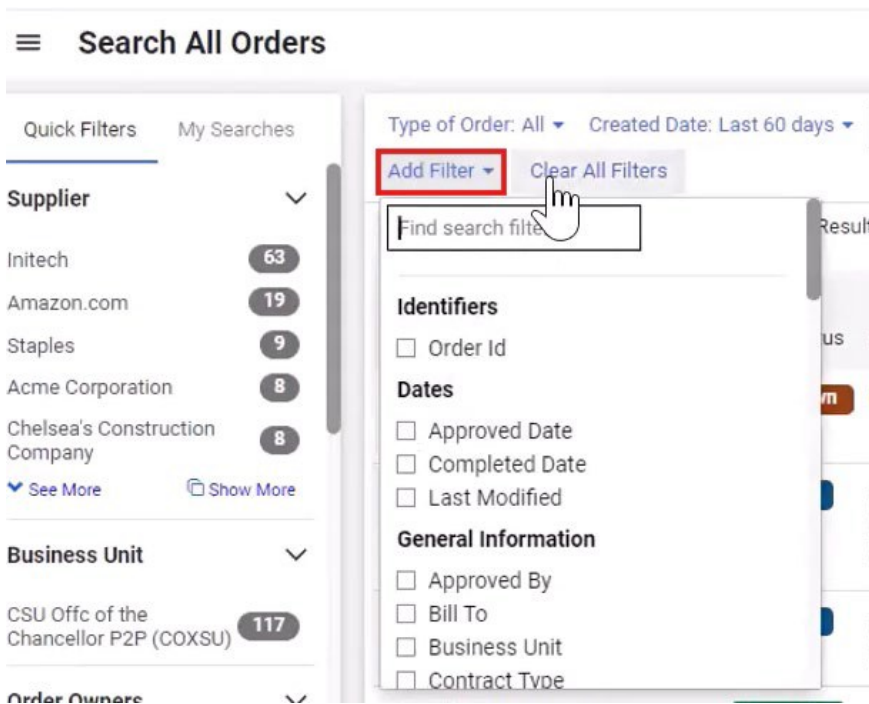
Quick Filters

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

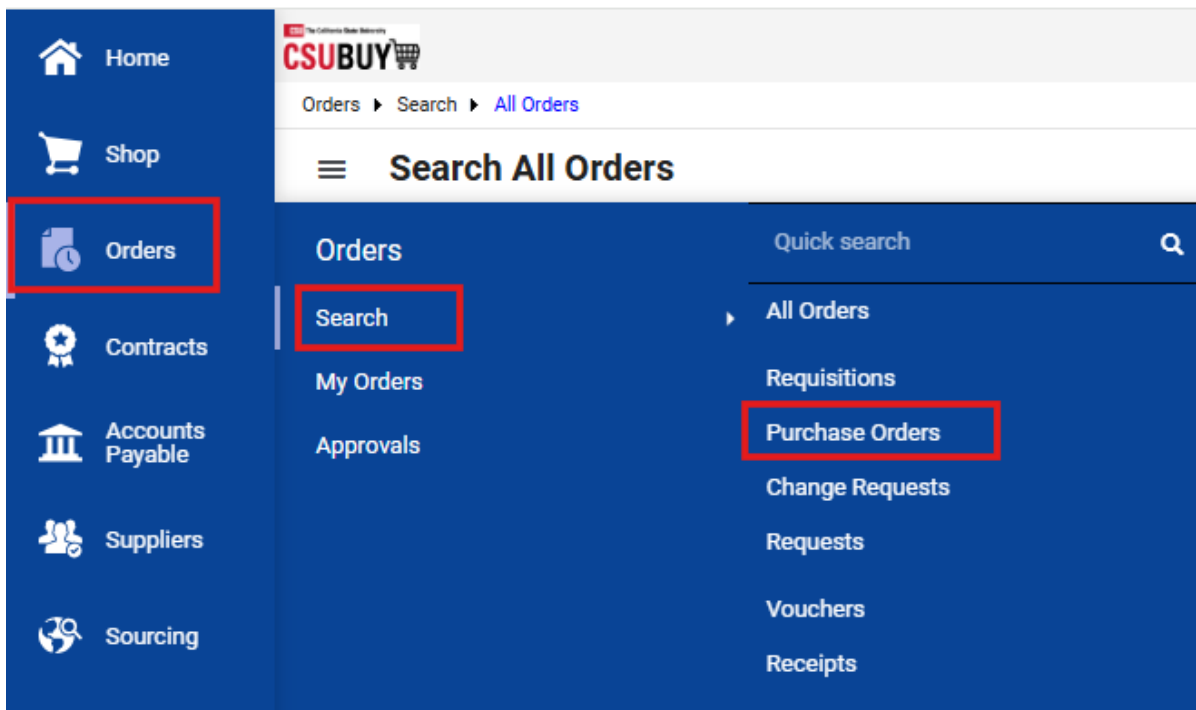


NOTE: Different filters are available based on the document being searched. Purchase Order Searches will have different filters from All Order searches.

You may also add filters and clear all filters:



For example, when searching Purchase Orders



Add a **PO Owner** filter.

Created Date: Last 90 days

Quick search

Add Filter

Clear All Filters

Voucher Pay Status: All

Page 1 of 4

1-100 of 317 Results

<input type="checkbox"/>	PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Supplier	Date
<input type="checkbox"/>	240006045T	4399866	C003860T	Open	Quality Classroom Supplies	
<input type="checkbox"/>	240006032T	4397261	C003854T	Open	Harry's Handyman Service	

PO

☐ PO Number
☐ PO Closed Date
☒ PO Owner
☐ PO Invoice Status
☐ PO Status
☐ PO Type
☐ *Amount-Only / Blanket PO
☐ *Multi-Year PO
☐ *PO Type

The following filter appears:

Created Date: Last 90 days

Quick search

PO Owner: All

Search...

☐ Current User

Top Filter Options

☐ Mowl, Kimberly (100)
☐ Kelly, Connor (32)
☐ Teodoro, Stacey (30)
☐ Castillo, Mel(MaryEllen) (25)
☐ Chang, Minna (22)
☐ Odle, Brian (19)
☐ Pruitt, Michael (14)
☐ Raitz, Gregory (14)
☐ Connors, Tammy (8)

ApplyCancel

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

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

Created Date: Last 90 days

Quick search

Add Filter

Clear All Filters

PO Owner: Chang, Minna

Voucher Pay Status: All

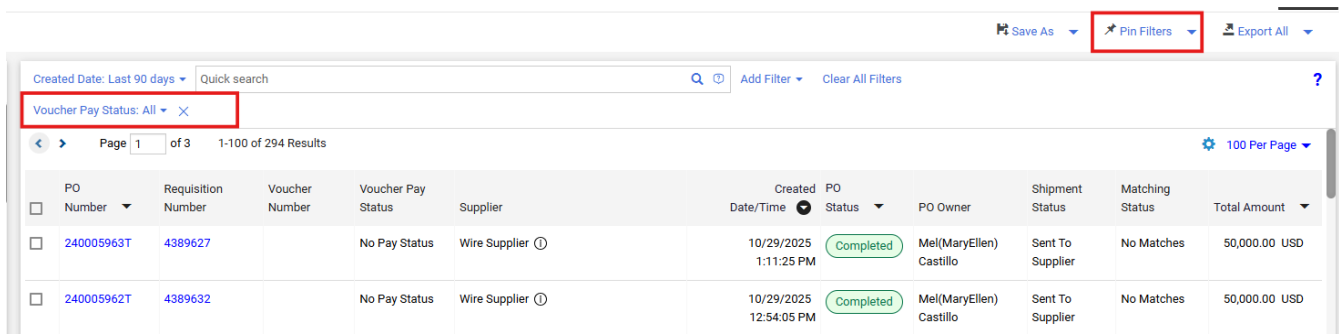
1-22 of 22 Results

☐ No Pay Status
☐ Open
☐ Paid

ApplyCancel

<input type="checkbox"/>	PO Number	Requisition Number	Status	Supplier	Created Date/Time	PO Status	PO Owner	Shipme
<input type="checkbox"/>	240004331T	436090		Acme Corporation	9/17/2025 2:59:19 PM	Completed	Minna Chang	Sent To
<input type="checkbox"/>	DP0000295T	436054		Globex Co.	9/17/2025 11:34:30 AM	Completed	Minna Chang	No Shi

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

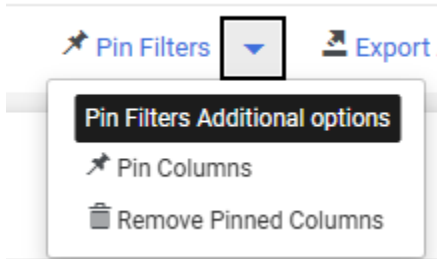


Created Date: Last 90 days Quick search Add Filter Clear All Filters

Voucher Pay Status: All X

Page 1 of 3 1-100 of 294 Results 100 Per Page

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



3-CUSTOMIZING SEARCH RESULTS

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

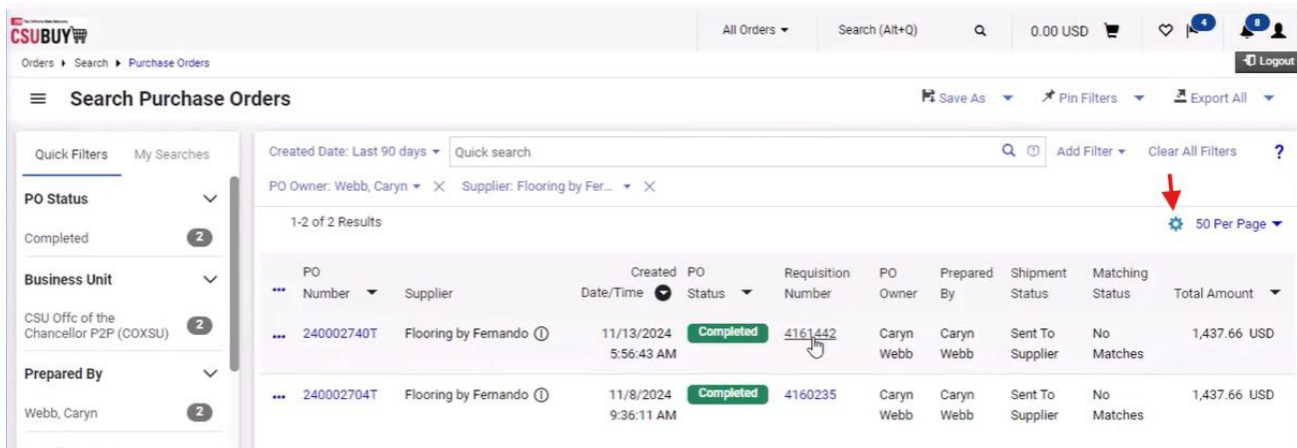
Please note that each Search Page must be customized separately. For example, the Purchase Order and Requisition search results each require their own customization.

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 displays:

Click on the gear:



CSUBUY

Orders Search Purchase Orders

Save As Pin Filters Export All

Created Date: Last 90 days Quick search Add Filter Clear All Filters

PO Owner: Webb, Caryn X Supplier: Flooring by Fer... X

1-2 of 2 Results 50 Per Page

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 don't 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...

☐ 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

↑

↓

↕

☒ Pin Columns as my defaults

Apply

Cancel

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.

116

Subbuy

Orders > Search > Purchase Orders

Search Purchase Orders

Quick Filters My Searches

Supplier

Acme Corporation 55

Globex Co. 29

Quality Classroom Supplies 28

Initech 19

BD Biosciences, Inc. 19

See More Show More

PO Status

Completed 295

Created Date: Last 90 days

Quick search

Add Filter Clear All Filters

Find search filter...

✓ Voucher Pay Status

Identifiers

☐ Change Request No.

☐ Contract Number

☐ Ext. Requisition Number

☐ PO Number

☐ Packing Slip Number(s)

☐ Receipt Name

☐ Receipt Number

PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Supplier	Created Date/Time	PO Status	Total Amount
<input type="checkbox"/> 240005983T	4391514		No Pay Status	Quality Classroom Supplies	10/30/2025 1:22:49 PM	Completed	55.25 USD
<input type="checkbox"/> 240005982T	4391593		No Pay Status	Acme Corporation	10/30/2025 1:09:02 PM	Completed	55.25 USD

The filter appears, and I may select which status I want to appear.

Created Date: Last 90 days

Quick search

Add Filter Clear All Filters

PO Owner: Chang, Minna

Voucher Pay Status: All

1-22 of 22 Results

☐ No Pay Status

☐ Open

☐ Paid

Apply Cancel

PO Number	Requisition Number	Status	Supplier	Created Date/Time	PO Status	PO Owner	Shipments
<input type="checkbox"/> 240004331T	43609		Acme Corporation	9/17/2025 2:59:19 PM	Completed	Minna Chang	Sent To
<input type="checkbox"/> 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.

Save As Pin Filters Export All

Created Date: Last 90 days

Quick search

Add Filter Clear All Filters

Voucher Pay Status: All

Page 1 of 3 1-100 of 294 Results

100 Per Page

PO Number	Requisition Number	Voucher Number	Voucher Pay Status	Supplier	Created Date/Time	PO Status	PO Owner	Shipment Status	Matching Status	Total Amount
<input type="checkbox"/> 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
<input type="checkbox"/> 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

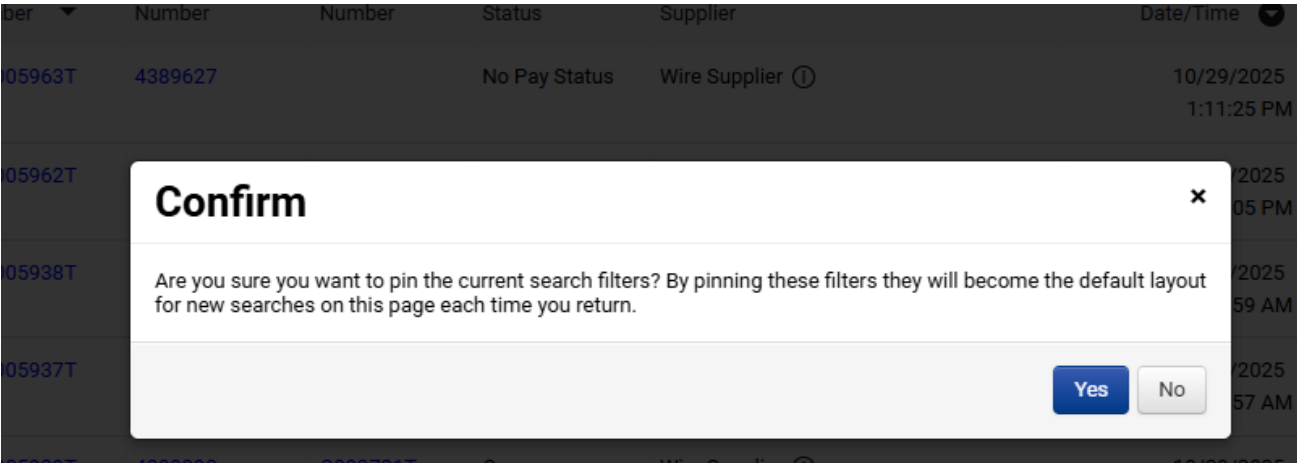
Pin Filters Export

Pin Filters Additional options

Pin Columns

Remove Pinned Columns

Click Yes:

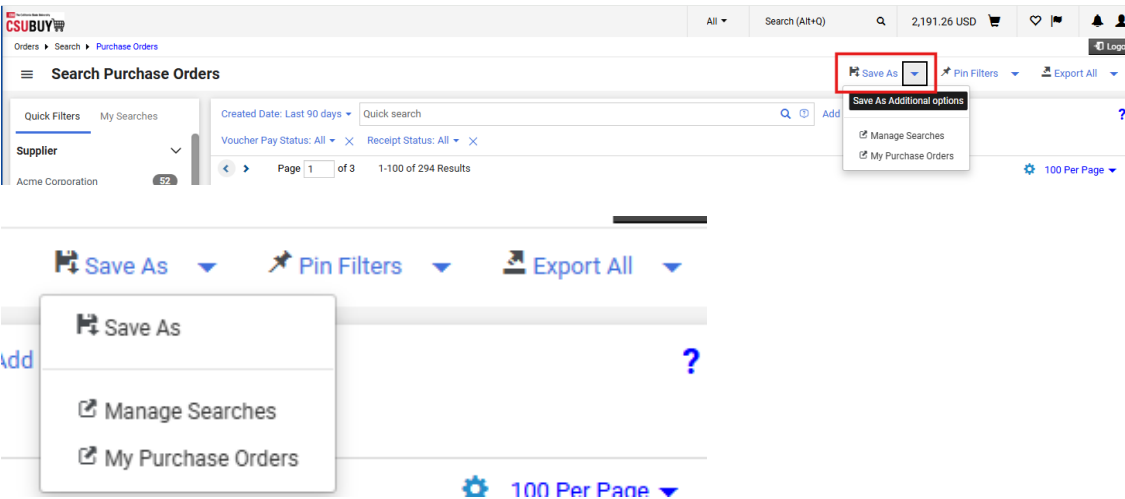


4-SAVING SEARCHES

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.

Save Search

Step 1: Details

Nickname

Minna PO Search

Add Description

Step 2: Select Folder Destination

Add New

Personal

You have no personal searches.

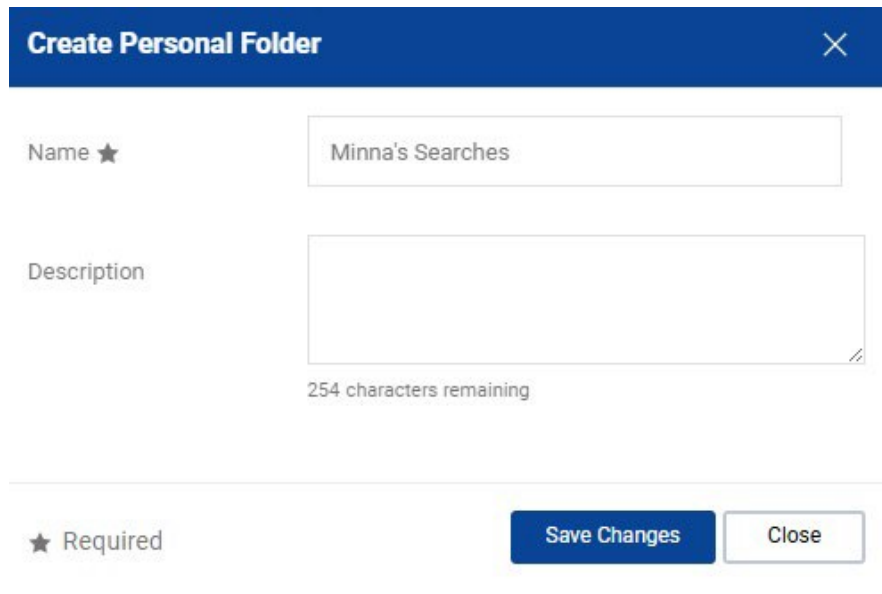
Shared

You have no shared searches.

Save

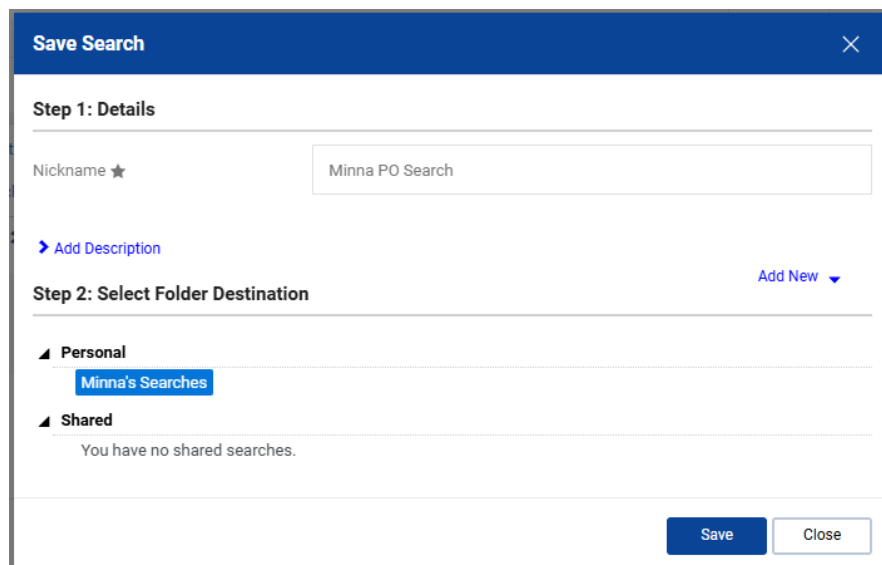
Close

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**.



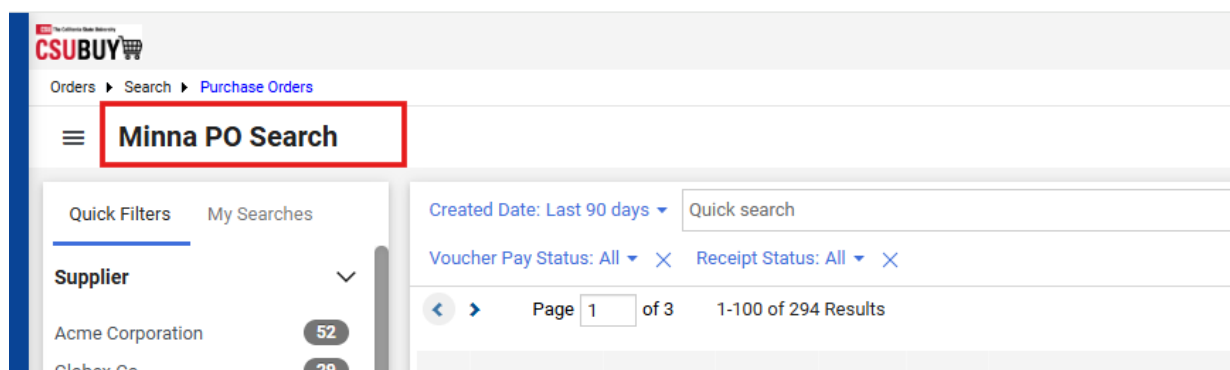
The 'Create Personal Folder' dialog box has a blue header with the title and a close button. It contains two input fields: 'Name' with a star icon and 'Description'. The 'Name' field contains the text 'Minna's Searches'. Below the 'Description' field, it says '254 characters remaining'. At the bottom, there is a 'Required' label with a star icon, and two buttons: 'Save Changes' and 'Close'.

Select the folder and **Save**.



The 'Save Search' dialog box has a blue header with the title and a close button. It is divided into two steps. 'Step 1: Details' has a 'Nickname' field with a star icon containing 'Minna PO Search' and a link to 'Add Description'. 'Step 2: Select Folder Destination' has a section for 'Personal' with a button 'Minna's Searches' and a section for 'Shared' with the text 'You have no shared searches.' and an 'Add New' link. At the bottom are 'Save' and 'Close' buttons.

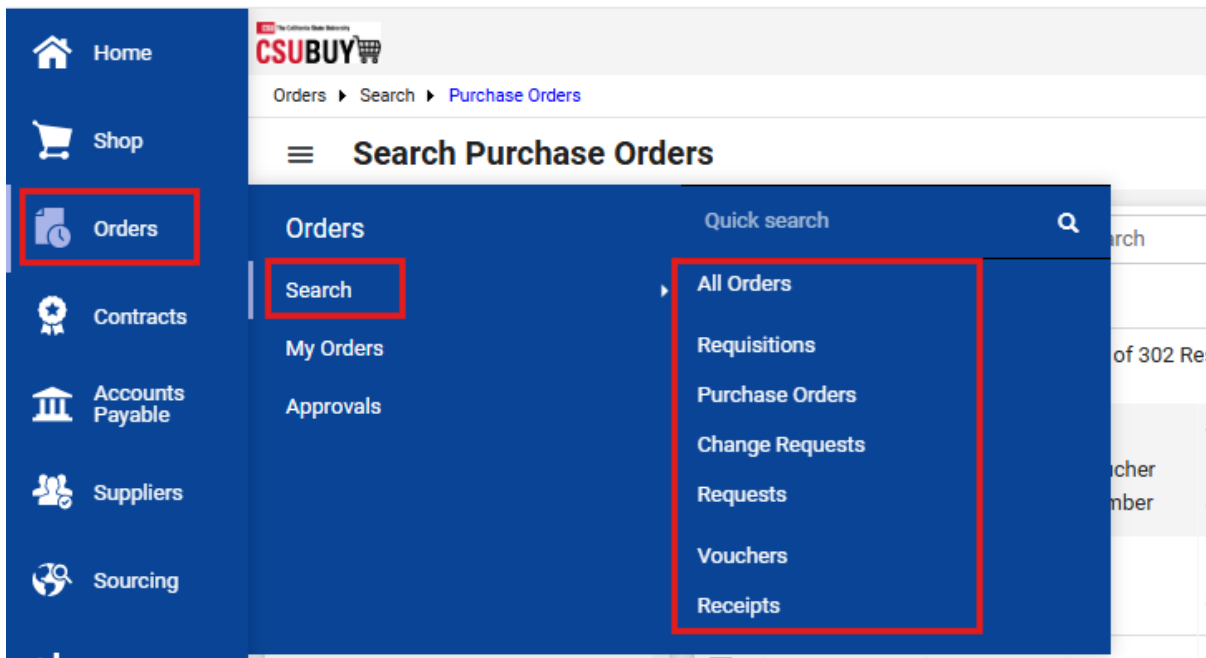
The saved search now displays your Search Name.



The CSUBUY search results page shows a breadcrumb trail: 'Orders > Search > Purchase Orders'. A red box highlights the search name 'Minna PO Search'. Below this, there are 'Quick Filters' and 'My Searches' tabs. The 'Supplier' filter is expanded, showing 'Acme Corporation' with 52 results and 'Glohex Co' with 29 results. On the right, there are filters for 'Created Date: Last 90 days', 'Voucher Pay Status: All', and 'Receipt Status: All'. At the bottom, it shows 'Page 1 of 3' and '1-100 of 294 Results'.

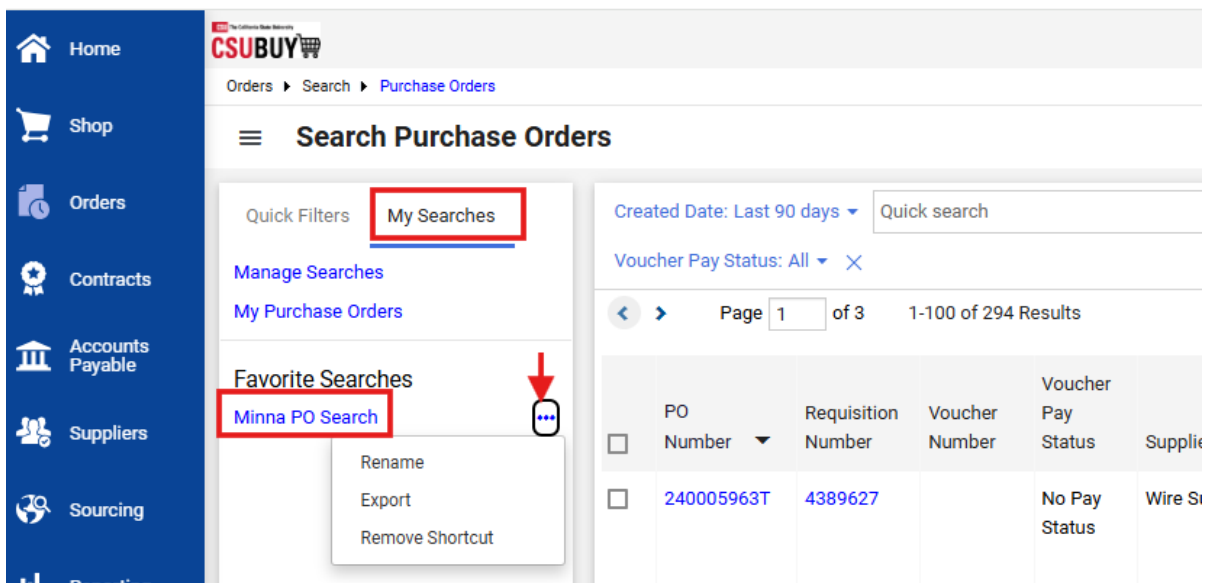
Finding Your Saved Search

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.

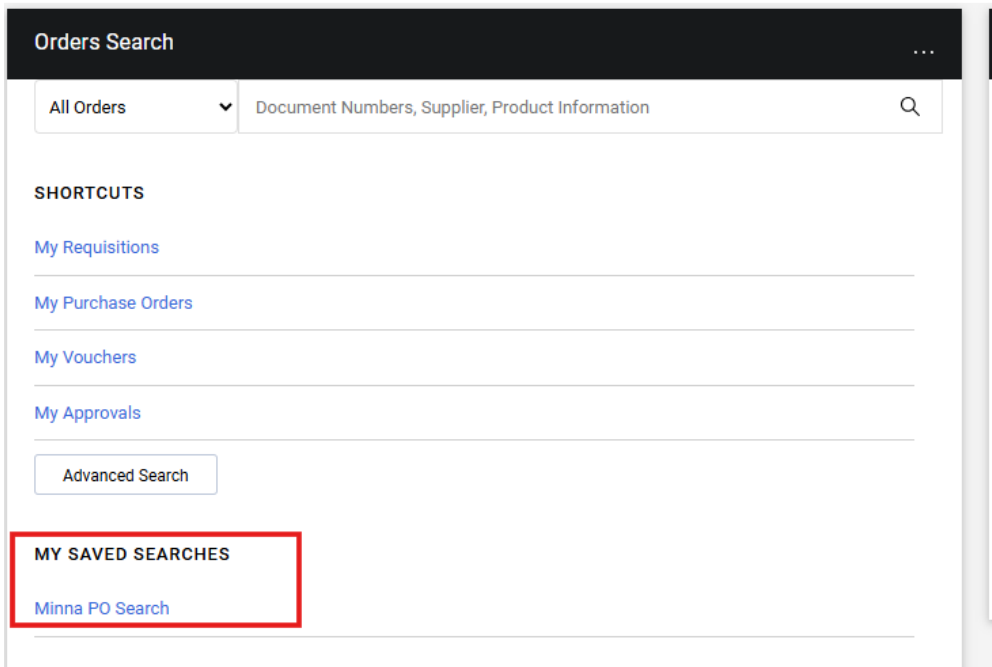


Then click on the My Searches tab and the saved search will be under Favorite Searches.

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.

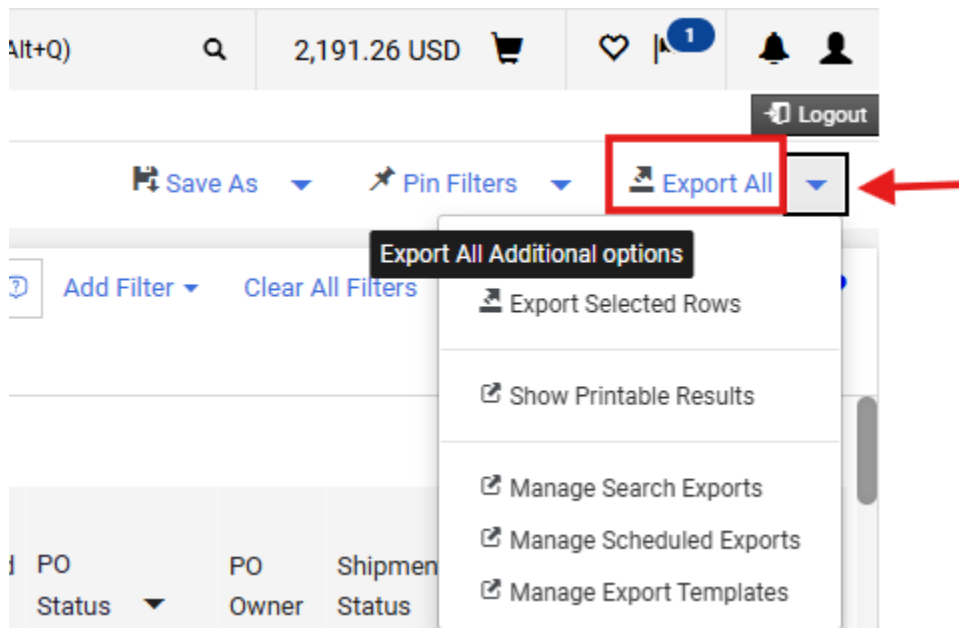


5-EXPORTING SEARCH RESULTS TO A REPORT

You have the ability to 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

Export Purchase Orders

Export Request Options (Step 1 of 1)

Title ★

Export request for Purchase Order

67 characters remaining

Type

Screen Layout

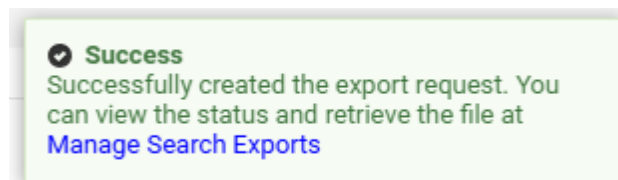
Format

Excel

Submit

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.

Manage Exports

Export Requests

Export Schedules

Export Templates

Click to Filter

Refresh this Page

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

Type of Order: All		Created Date: Last 90 days		Quick search		Add Filter		Clear All Filters	
Page 1		of 10		1-100 of 990 Results					
<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

Print

Close

Minna PO Search

Search Criteria

Created Date: Last 90 days

Page 1 of 4

100 Per Page

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 selection:
- 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

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT CODE DESCRIPTION
Capital Projects	100001	Capital-Preliminary Plans	607022	Capital Design
Capital Projects	100002	Capital-Construction	607031	Capital-Construction Contract
Capital Projects	100004	Group II Capital Assets	607009	Group II Equipment - Cap Projt
Capital Projects	100005	Real Estate Acquisition	607002	Acquisition
Capital Projects	100006	Capital-Pollution Remediation Costs	607043	Capital - Pollution Remed Exp
Capital Projects	100007	Capital-State Agency Costs	607032	Construction Management
Capital Projects	100008	Capital-Construction Other	607033	Construction Other
Capital Projects	100009	Capital-Master Plan	660066	Cap-Strategic & Master Plan
Equipment	105002	Equipment	619001	Other Equipment
Equipment	105003	Vehicles	619001	Other Equipment
Equipment	105004	Farm Equipment	619001	Other Equipment
IT	115001	IT Accessories/Supplies	660940	Computer Supplies
IT	115002	IT Hardware	616002	I/T Hardware
IT	115003	IT Hardware Maintenance	616801	I/T Hardware Maintenance
IT	115004	IT Software	616003	I/T Software
IT	115005	IT Software Maintenance	616003	I/T Software
IT	115006	Telecommunications Supplies	616001	I/T Communications
IT	115007	Telecommunications Services	616001	I/T Communications
IT	115008	IT Professional Services	613001	Contractual Services
IT	115009	IT Consulting	613800	Consulting Contract Services
Leases/Rentals	140001	IT Lease/Rental Services	616002	I/T Hardware
Leases/Rentals	140002	Equipment Lease/Rental Services	660822	Equipment Rental
Leases/Rentals	140003	Real Estate & Space Lease/Rental Services	660041	Space Rental
Leases/Rentals	140004	Vehicle Lease/Rental Services	660937	Vehicle Lease
Maintenance, Repair, and Operations	145001	Building Maint/Repair Services	660061	Building Maintenance
Maintenance, Repair, and Operations	145002	Custodial Maint/Repair Services	660003	Supplies and Services
Maintenance, Repair, and Operations	145003	Elevator Maint/Repair Services	660061	Building Maintenance

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT CODE DESCRIPTION
Maintenance, Repair, and Operations	145004	Equipment Maint/Repair Services	660003	Supplies and Services
Maintenance, Repair, and Operations	145006	Landscape Maint/Repair Services	660064	Rep & Maint Landscape & Ground
Maintenance, Repair, and Operations	145007	Vehicle Maint/Repair Services	660932	Motor Vehicle Expense
Maintenance, Repair, and Operations	145009	Custodial Supplies	660812	Custodial Supplies
Maintenance, Repair, and Operations	145010	Facilities Supplies	660003	Supplies and Services
Maintenance, Repair, and Operations	145011	Housing Supplies	660003	Supplies and Services
Maintenance, Repair, and Operations	145013	Vehicle Parts/Accessories	660932	Motor Vehicle Expense
Maintenance, Repair, and Operations	145014	Utilities Maint/Repair Services (Co-Generation Plants)	660003	Supplies and Services
Maintenance, Repair, and Operations	145015	Housing Maint/Repair Services	660061	Contractual Services
Misc. Other	150003	Works of Art	660003	Supplies and Services
Misc. Other	150006	Controlled Substances	660003	Supplies and Services
Misc. Other	150007	Furniture	619804	Furniture
Misc. Other	150008	Official Guest	660003	Supplies and Services
Misc. Other	150009	Official Guest Travel	660003	Supplies and Services
Misc. Other	150011	Insurance	660010	Insurance Expense
Misc. Other	150012	Memberships	660816	Dues and Subscriptions
Misc. Other	150015	Subscription/Publication (non-IT)	660816	Dues and Subscriptions
Misc. Other	150018	Training/Professional Dev	660009	Professional Development
Misc. Other	150019	Weapons	619001	Other Equipment
Misc. Other	150021	Shipping/Freight (Non-Taxable)	660001	Postage and Freight
Misc. Other	150022	Shipping/Freight & Handling (Taxable)	660001	Postage and Freight
Misc. Other	150025	Accreditation Services	660043	Accreditation Expense
Non-Recycled Items	156001	Antifreeze - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156002	Mulch/Compost - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156003	Glass Products - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156004	Lubricating Oils - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156005	Paint - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156006	Paper - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156007	Plastic - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156008	Metals - Non-Recycled	660003	Supplies and Services

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT CODE DESCRIPTION
Non-Recycled Items	156009	Tire Derived Products - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156010	Tires Larger 15in - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156011	Tires Smaller 15in - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156012	Building Finishes - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156013	Carpet - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156014	Erosion Control Products - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156015	Pavement Surfacing - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156016	Printing & Writing Paper - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156017	Soil Amendments & Soil Toppings - Non-Recycled	660003	Supplies and Services
Non-Recycled Items	156018	Textiles - Non-Recycled	660003	Supplies and Services
Fuel	157001	Diesel	605002	Gas
Fuel	157002	Gasoline	605002	Gas
Fuel	157003	Dyed Diesel	605002	Gas
Hospitality	158001	Catering Services	660922	Hospitality Expense
Hospitality	158002	Hospitality Space Rental	660922	Hospitality Expense
Hospitality	158003	Food and Beverage (Non-Taxable)	660922	Hospitality Expense
Hospitality	158004	Food and Beverage (Taxable)	660922	Hospitality Expense
Recycled Items	159001	Antifreeze - Recycled	660003	Supplies and Services
Recycled Items	159002	Mulch/Compost - Recycled	660003	Supplies and Services
Recycled Items	159003	Glass Products - Recycled	660003	Supplies and Services
Recycled Items	159004	Lubricating Oils - Recycled	660003	Supplies and Services
Recycled Items	159005	Paint - Recycled	660003	Supplies and Services
Recycled Items	159006	Paper - Recycled	660003	Supplies and Services
Recycled Items	159007	Plastic - Recycled	660003	Supplies and Services
Recycled Items	159008	Metals - Recycled	660003	Supplies and Services
Recycled Items	159009	Tire Derived Products - Recycled	660003	Supplies and Services
Recycled Items	159010	Tires Larger 15in - Recycled	660003	Supplies and Services
Recycled Items	159011	Tires Smaller 15in - Recycled	660003	Supplies and Services
Recycled Items	159012	Building Finishes - Recycled	660003	Supplies and Services
Recycled Items	159013	Carpet - Recycled	660003	Supplies and Services
Recycled Items	159014	Erosion Control Products - Recycled	660003	Supplies and Services

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT CODE DESCRIPTION
Recycled Items	159016	Printing & Writing Paper - Recycled	660003	Supplies and Services
Recycled Items	159017	Soil Amendments & Soil Toppings - Recycled	660003	Supplies and Services
Recycled Items	159018	Textiles - Recycled	660003	Supplies and Services
Services	160001	General Services	660003	Supplies and Services
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
Services	160013	Auxiliary Organization Services	660003	Supplies and Services
Supplies	170001	Lab/Scientific Supplies	660910	Laboratory/Research Supplies
Supplies	170002	Medical Supplies	660003	Supplies and Services
Supplies	170003	General Supplies	660003	Supplies and Services
Supplies	170005	Advertising/Promotional Supplies	660017	Advertising & Promotion
Supplies	170006	HazMat/Chemical Supplies	605006	Hazardous Waste
Supplies	170007	Safety/Security Supplies	660003	Supplies and Services
For Library Use Only	180001	Bookbinding (Library Only)	660003	Supplies and Services
For Library Use Only	180002	Library Books (Library Only)	608001	Library Books (Lbry use only)
For Library Use Only	180003	Library Serials (Library Only)	608001	Library Books (Lbry use only)
For Library Use Only	180004	Library Periodicals (Library Only)	608001	Library Books (Lbry use only)
For Library Use Only	180005	Library Subscriptions (Library Only)	608005	Library Subscriptions
Direct Purchase	700002	Attorney Fee	660019	Litigation Cost
Direct Purchase	700003	Freight/Postage/Shipping	660001	Postage and Freight
Direct Purchase	700004	Legal Settlement	660090	Expenses-Other
Direct Purchase	700005	Local/Federal Gov. Payment	660090	Expenses-Other
Direct Purchase	700006	Medical Service Payment	660003	Supplies and Services
Direct Purchase	700007	Memberships	660816	Dues and Subscriptions

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUNT CODE DESCRIPTION
Direct Purchase	700009	Official/Referee Payment	613001	Contractual Services
Direct Purchase	700010	Permits/Licenses (non IT)	660003	Supplies and Services
Direct Purchase	700011	Credit Card Bank Payment	107003	Expense Advance
Direct Purchase	700012	Royalty Payment	660003	Supplies and Services
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	Telephone Usage
Direct Purchase	700020	Direct Pay Other	660090	Expenses-Other
Direct Purchase	700021	Student Union Return of Surplus	660045	Student Union Return Surplus

2-LIST OF ACCOUNT CODES

ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION
604001	Telephone Usage	616004	I/T Infrastructure	660047	CO Cash Management Overhead
604090	Other Communications	616005	Misc Info Tech Costs	660049	Investment Service Charges
604808	Mobile Phone Charges	616101	Interagency I/T Software	660061	Building Maintenance
604809	IT Voice & Data Charges	616801	I/T Hardware Maintenance	660064	Rep & Maint Landscape & Ground
605001	Electricity	616803	I/T Hardware Other	660066	Cap-Strategic & Master Plan
605002	Gas	617001	Services fr Oth Funds/Agencies	660089	Other Non-Operating Expenses
605003	Oil	617002	Services fr State Fire Marshal	660090	Expenses-Other
605004	Water	617090	Services from Auxiliary Org	660091	Depr Bldg & Bldg Improvements
605005	Sewage	617101	Service frm bet. Campuses & CO	660095	Depreciation on Equipment
605006	Hazardous Waste	617103	Services fr Office Fire Safety	660096	Deprec Expense-Finance Leases
605800	Non-Hazardous Waste	617800	Accounting Service Charges	660105	Interfund Pension Loan Repayme
606001	Travel-Domestic, In California	617801	Fingerprinting	660804	Athletic Game Guarantees

ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION
606002	Travel-Domestic, Out of State	619001	Other Equipment	660807	Worker's Compensation Premium
606803	Travel - International	619800	Instructional Equip Misc	660810	Printing Other
607002	Real Estate Acquisition	619803	Equipment Other	660811	Fund Raising Expense
607008	Service Districts Assessments	619804	Furniture	660812	Custodial Supplies
607009	Group II Equipment - Cap Projt	620001	SP-Subrecipient - 25K & Under	660813	Gifts and Awards
607010	Lease Purchase	620002	SP-Subrecipient - Over 25K	660815	Exhibits and Shows
607022	Capital Design	622001	SP-Participant Support -w/F&A	660816	Dues and Subscriptions
607026	Capital-Working Drawings (W)	622002	SP-Participant Support -No F&A	660820	Technology Work Order Charges
607031	Capital-Construction Contract	622801	SP-Research Incentives-w/F&A	660821	Parking
607032	Construction Management	623001	SP-Materials, Suppl & Services	660822	Equipment Rental
607033	Construction Other	623801	SP-Laboratory/Resrch Supplies	660830	Space Rental Other
607037	Capital-Insurance Premiums	624001	SP-Scholarships-w/F&A	660833	Master Teacher Contr
607043	Capital - Pollution Remed Exp	624002	SP-Scholarships-NO/F&A	660834	Accreditation
608001	Library Books (Lbry use only)	624801	SP-Scholarships-Tuition w/ F&A	660835	Lectures & Performances
608005	Library Subscriptions	624803	SP-Scholarships-Tuition NO F&A	660837	Athletics bks/course materials
609001	State E.O.P. Grant Program	624804	SP-Scholarships-Books NO F&A	660838	Student Athlete Meals nontrav
609002	State University Grant	660001	Postage and Freight	660839	Sprts Equip, Uniforms and Supp
609003	State Grants-Other	660002	Printing	660840	Gift Card Expense
609004	State Graduate Fellowship	660003	Supplies and Services	660887	Princ Can-Other Adj
609005	Other Student Scholar/Grants	660004	Interfund Interest Expense	660902	Other Coll Costs
609007	Scholarships/Grants - Private	660005	Interest Expense-Finance Lease	660910	Laboratory/Research Supplies
609008	Scholarships/Grants - Institut	660006	Interest on Bonds and Notes	660919	Taxes - Property
609009	Fin Aid - CSU Educ Doctorate	660007	Principle on Bonds and Notes	660922	Hospitality Expense
609010	DPT Financial Aid-Non SUG	660008	Interest Charges-Others	660923	Credit Card Fees
609011	DNP Financial Aid Non-SUG	660009	Professional Development	660927	Instructional Materials
609013	Summer Enrollment Grant FA Exp	660010	Insurance Expense	660930	Copier Program

ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION
609099	Scholarship Allow Tuition Disc	660014	State Service Charges for SRB	660937	Vehicle Lease
609800	Student Grants Awarded	660016	Property Insurance Premium Exp	660940	Computer Supplies
610001	Federal Financial Aid	660017	Advertising & Promotion	660942	Parking Citation County Surchg
610002	Federal Fin Aid Loan Disb	660019	Litigation Cost	660955	Food Services Uncollectable
612001	State Pro Rata Charges-Admin	660024	Overhead - Other	660981	Improvements / Mods (non-cap)
613001	Contractual Services	660025	Overhead-Chancellor's Office	660982	Design Srvs-D Phase (non-cap)
613800	Consulting Contract Services	660027	Pollution Remed Exp (non-cap)	660983	Construction Services (non-cap)
613801	Non-Credit Instructr Pay (001)	660040	Bad Debt Expense	660987	Billing Clearing Account
613802	UCES-Field Trips-Test (001)	660041	Space Rental	660989	Feasibility Study Constr Proj.
613803	Legal Services	660042	Recruitment	662001	F&A Cost - Federal
613804	Audit Services	660043	Accreditation Expense	662003	Project Facility/Space Costs
616001	I/T Communications	660044	Loan Cancellation and Defaults	662004	Project Admin Costs/Fees
616002	I/T Hardware	660045	Student Union Return Surplus	662801	F&A Cost - State
616003	I/T Software	660046	Wells Fargo Bank Charges	662802	F&A Cost - Local
				662803	F&A Cost- Non-Governmental

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.

		CSUBUY:		CSUBUY:	CSUBUY:		CSUBUY:
		Accounting Date		Voucher #	Item in Shopping Cart		
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	YCH - 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	

CSUBUY:		CSUBUY:	CSUBUY:	JAG indicates the transaction came from CSUBUY					
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

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 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		Additional Information		
Invoice Details		Remit To		
Supplier Name				PO Box 50129
Supplier No.	0003825401			Los Angeles, California 90074-0129
				United States
				Address Id 5