



CSU Monterey Bay Operations Support & Innovation Office

Purchase Requisition Process Guide

Overview:

This document is a guide to create a purchase requisition in the Common Finance System (CFS). A requisition will be the initial request from your department to procurement to identify a supplier for goods or services you need. Before creating a purchase requisition, please review the [Business Support Services Procurement](#) website for current campus' policies and procedures.

Once the requisition has been created it must be approved by the appropriate authority. A copy of the requisition (before approved) can be printed and routed through appropriate channels, if additional approvals are needed. Once the requisition has been approved the Procurement Office will convert the requisition into a purchase order.

Note: Access to CFS requires the completion of a [CFS Data Access Request Form](#). Please complete and forward to osi@csumb.edu via Adobe Sign.



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Step 1: Accessing CFS/Purchase Requisition Module

1. Access CFS via the CSUMB Dashboard. If you do not see the CFS Finance icon in your Dashboard, you may not need to submit a [CFS Data Access Request Form](#).

2. Access the Purchasing Module: Click on the NavBar icon  to navigate to Menu

Menu > Purchasing > Requisitions > Add/Update Requisitions

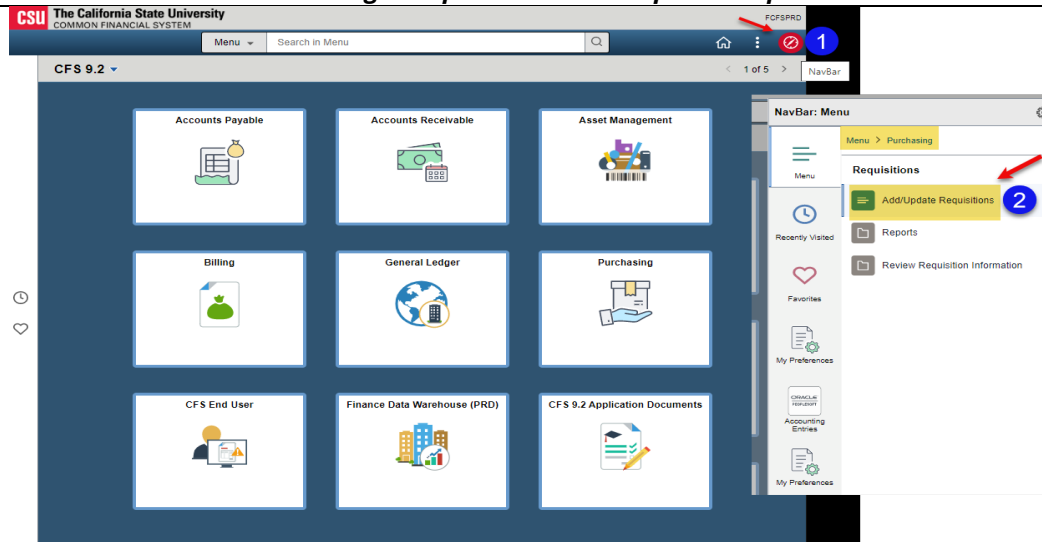


Figure 1: Navigate to Add/Update Requisitions Page

3. **Optional:** Adding page to your Home Page. Click the 'Add to Homepage' link to create a tile on your designated Homepage.

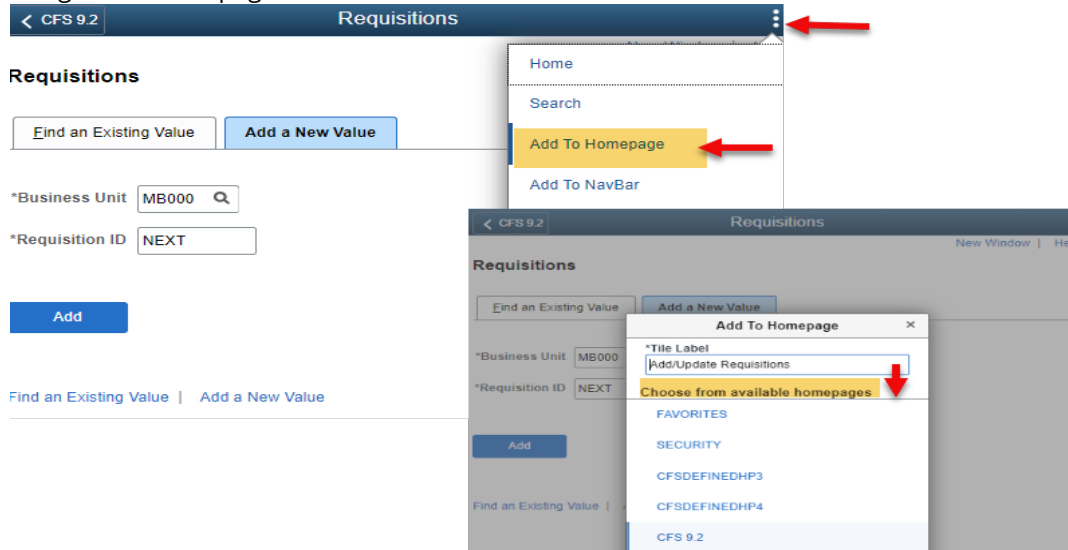


Figure 2: Home Page option



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Step 2: Create Requisition - Add a New Value

1. Select the **Add New Value** Tab.
2. **Business Unit** – use look up and select appropriate value.
3. **Requisition ID** – **DO NOT CHANGE** leave “NEXT” – system will create a new value when record is saved.
4. Click **Add**.

Requisitions

Business Unit: MB000

Requisition ID: NEXT

Figure 3: Add a New Requisition

Step 3: Maintain Requisitions Page - Header Section

Maintain Requisitions

Requisition

Business Unit: MB000 Status: Approved

Requisition ID: NEXT Budget Status: Not Chk'd

Requisition Name: Copy From

▼ Header ⓘ

*Requester: 06000001234 Monte Rey

*Requisition Date: 07/26/2023 Requester Info

Origin: ONL Online

*Currency Code: USD Dollar

Accounting Date: 07/26/2023

Amount Summary ⓘ

Total Amount: 0.00 USD

Requisition Defaults

Requisition Activities

Add Items From ⓘ

Figure 4: Maintain Requisitions Page - Header Section

1. **Business Unit** – accept default.
2. **Requisition ID** – will be assigned when saved.
3. **Requisition Name** - leave blank
4. **Status** "Open" – defaults to "Approved".
5. **Budget Status** – will be "Not Chk'd" until Saved or icon is clicked.
6. **Requester** – ID of person creating the Requisition will default automatically.
7. **Requisition Date** – date created, accept default.
8. **Origin** – accept default (ONL = online).
9. **Accounting Date** – accept default.
10. **Add Comments** link – used to enter standard comments for the order, e.g., enter end-users name, phone and building, quote number, suppliers contact name, etc. Check **Send to Vendor**, **Shown at Receipt** and **Shown at Voucher** (all three). Attach a copy of the quote. Note: if the total purchase is over \$50K three quotes are required. Click **OK**
11. Click on the **Requisition Defaults** link [Requisition Defaults](#)



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Step 4: Requisition Defaults

A. Line Section

The screenshot displays the 'Requisition Defaults' form for a 'Line' section. At the top, it shows 'Business Unit: MB000', 'Requisition ID: NEXT', 'Requisition Date: 07/26/2021', and 'Status: Approved'. Below this, there are fields for 'Buyer' (06000008033, Salas, Eva L), 'Supplier' (0000002686, CHRONICLE OF HIGHER EDUCATION), 'Category' (71500), 'Unit of Measure' (EA), and 'Supplier Location' (MAIN). A 'Supplier Lookup' link is also present. The form includes sections for 'Distribution' (SpeedChart) and 'Distributions' (Details, Asset Information). A table at the bottom lists 'Dist', 'Percent', 'GL Unit', 'Account', 'Oper Unit', 'Fund', 'Dept', and 'Program'.

Figure 5: Line Section

1. **Buyer** – select buyer name
2. **Supplier (Vendor)**–Look up using short description to select supplier name or use Supplier Lookup link
3. **Category** – select category code –
 - Category codes are established by the National Institute of Government Purchasing (NIGP) and are used universally to describe different commodities.
 - The Chancellor's office requires all CSU's to use the category code so that expenditures among campuses can be compared. It is important that you take the time select the correct category codes. If in doubt, please contact your Buyer.
 - In CFS, each **Category Code is linked to corresponding Account**; the account is auto-populated when the category code is selected. If needed the account can be later changed in the Header Defaults > Distributions Section.
 - Click [here](#) for a link to **Category Codes** and their corresponding expense accounts
4. **Unit of Measure (UOM)** – Use **EA** for all orders. Use **LOT** for contracts/services (including Blanket Purchase Orders).
5. **Supplier Location** – accept default (MAIN).



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B. Schedule Section - Distribute by AMT or QTY

6. Ship to – accept default (RECEIVING).

NOTE: All goods should be shipped to receiving without exception. No items should be delivered directly to the department or individual. (see Figure 12).

7. Due date – leave blank

8. Ultimate Use Code & Attention Code –leave blank

9. Distribute by (see discussion to the right)

10. Liquidate by – accept default. This value will default from the value used in the “distribute by” field.

Schedule

Figure 6: Distribute by and Liquidate by fields in Schedule section.

Data selected in the “distribute by” field applies to each distribution line.

When to use Quantity (QTY):

Use QTY when ordering one or more than one (1) any tangible item on any line.

When to use Amount (AMT):

For contracts and services (including Blanket Purchase Orders – See Figure 7) that have a not to exceed amount, enter AMT. This enables the system to pay for orders with any number of Line Items (list of services) with various costs for each until the total contract amount is reached (or until you indicate FINAL PAYMENT on the invoice).

A purchase requisition may have more than one line, but each line must use 1 EA; if you attempt to enter 2 EA using the Distribute by= AMT, you will get an ERROR.

C. Blanket Purchase Orders Sample

A blanket or open purchase order is created when you want to make multiple purchases of the same item/service from the same vendor throughout the fiscal year

The following fields are handled differently for BPO's:

Requisition Defaults:

1. **UOM** = LOT
2. **Distribute by** = Amount
3. **Quantity** = 1
4. **Price** = Total dollar amount of the requisition.

NOTE: Liquidate by field will become inactive when Amount is selected.

Requisition Defaults

Side the default values found in the default hierarchy

Figure 7: For Blanket Purchase Requisitions, distribute by Amount



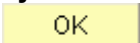
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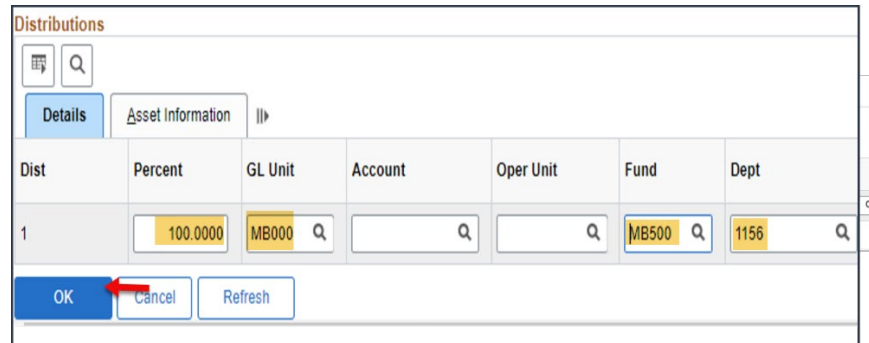
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D. Distributions Section – Single Chart String

This section describes how the item(s) will be paid for.

- If the item (or majority of items) is to be charged to one chart string, complete details at this time. This will populate the Distribution sections for all items.
- If you are paying for any item from more than one source, create a separate Line for each chart string to be charged (**Line > Schedule > Distribution**). **DO NOT** use the Distributions Section on the Requisition Header. See [Split Distributions](#) section for details on **how to split charges** between multiple funding sources.

1. **Percent** – leave blank.
2. **GL Unit** – use look up.
3. **Account** – will default from category code – leave blank.
4. **Fund** – use look up.
5. **Dept** – enter dept ID.
6. Other fields, enter if applicable or leave blank
 - **Oper Unit**
 - **Program**
 - **Class**
 - **Bud Ref**
 - **Product**
 - **Project**
7. Click . This will take you back to the **Maintain Requisitions** page



Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept
1	100.0000	MB000			MB500	1156



Figure 8: Requisition Defaults - Distribution Section (Example with one char string)

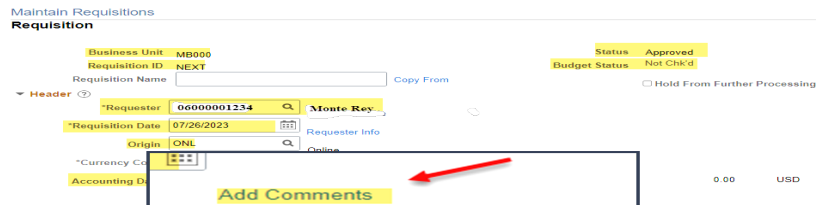


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Step 5: Comments Link

1. **Maintain Requisitions** page, click the Add Comments Link
2. **Comments Section:**
Enter comments in the following format:
 - Name (of person creating the requisition)
 - Shipping address
 - Telephone number and extension/email
 - Total \$ Amount
 - ChartstringCheck boxes for Send to Supplier, Receipt and at Voucher.
3. **Attachment section:**
Attach quote and/or any documents for Procurement office to review. **If total purchase is over \$50K, three quotes are required.**
4. **Note:** Use the  to enter additional comment rows if needed.
5. Click  when you have finished entering information on this page. This will take you back to the **Requisition Form** page.



The screenshot shows the 'Maintain Requisitions' page. At the top, there are fields for Business Unit (MB000), Requisition ID (NEXT), and Requisition Name. Below these, there are fields for Requester (06000001234), Requester Date (07/26/2023), and Origin (ONL). A red arrow points to the 'Add Comments' link located below the 'Accounting D' field.

Figure 9: Add Comments link from the Requisition page

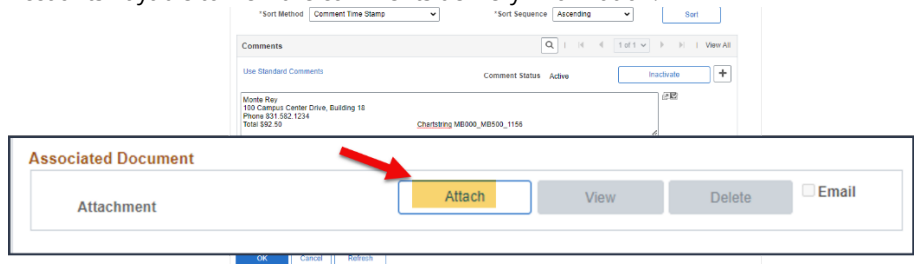


The screenshot shows the 'Header Comments' section. It includes a 'Use Standard Comments' button and a 'Comment Status' dropdown set to 'Active'. A comment entry form is shown with the following fields: Name (Monte Rey), Address (5410 Butler Street, Seaside, CA 93955), Phone (831.582.1234), Total (\$ 592.50), and Chartstring (MB000_MB500_1156). Below the form, there are checkboxes for 'Send to Supplier' and 'Show at Receipt', both of which are checked. A red arrow points to the 'Show at Receipt' checkbox.

Figure 10: Line Comments

Please use the CSUMB Shipping & Receiving address
5410 Butler Street
Seaside CA 93955

NOTE: Sender, Voucher and Receipt boxes must be checked for Receiving and Accounts Payable to view the comments delivery information.



The screenshot shows the 'Associated Document' section. It includes a table with columns for 'Attachment', 'View', 'Delete', and 'Email'. A red arrow points to the 'Attach' button in the 'Attachment' column.

Figure 11: Attachment Document area - **QUOTE IS REQUIRED**
If total purchase is over \$50K, three quotes are required.




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Step 6: Maintain Requisitions Page

A. Line Details Section

Figure 12: Line Details Section

- Item** – leave blank
- Description** - This description will be carried through the audit trail, make it precise. Click  this will bring up a pop-up that allows you to see the entire description (limit 254 characters). Note: Line Comments section may be used for additional descriptions
- Quantity** – Enter number or items: * **UOM** – enter either **EA** or **LOT** for contracts and services.
- Category** – Value defaults from requisition header. Accept default.
- Price** – Enter price for each item or service. **Do not include sales tax in this line section.**
- If you are ordering **more than one item** from this supplier, you may add it at this point. Otherwise, proceed to comments link (Figure 9, Page 8).



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B. Additional Requisition Lines

cfs.fsdev.cmsdc.calstate.edu says

Enter number of rows to add:

OK

Cancel

Figure 13: Add an Additional Item to your Requisition

- If you have more than one-line item in this Requisition, click at the end of the last line to add a line.
- You will be prompted for the number of rows to add. Enter the number of rows and click

OK

.
- To delete a line item from the Requisition, click at the end of the line you wish to delete.
- You can click the Save button to save your requisition on this screen. In order to save a requisition, you must have filled out all of the line details. Click

Save

Note: Upon successfully saving, you will notice a Requisition ID has been assigned. At this point in time, you can still **modify** any part of the requisition including adding additional lines, changing quantities, etc.



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C. Split Distributions

If you are **splitting the source of funding** for any item (s), you will need to create a **separate** Line for each item so that the **Line Distribution** will reflect the different source of funding, Mandatory fields include Account, Fund, and Department ID, but you may also need to include Program, Class, or Project codes for your order.

If more than one department or account is to be charged for an order (multiple distributions) go to the Distributions section. If not, proceed to Step 7 (Budget Check Section).

Lines (cont.):

10. Ensure that a separate line is created for each item to be split.

11. Click the Schedule  icon for each line. This will open the **Schedule** page.

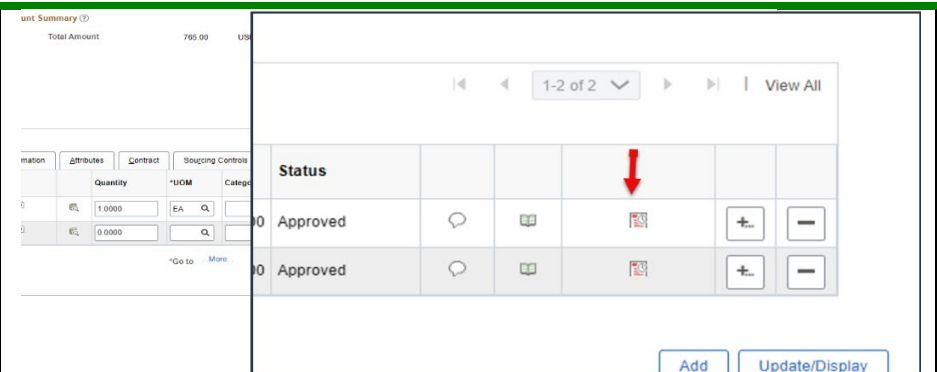



Figure 14: Schedule link on Line Section

D. Schedule Page

Schedule Page:

12. Click  (icon with 3 small black errors) on the schedule page to open **Distribution** page.

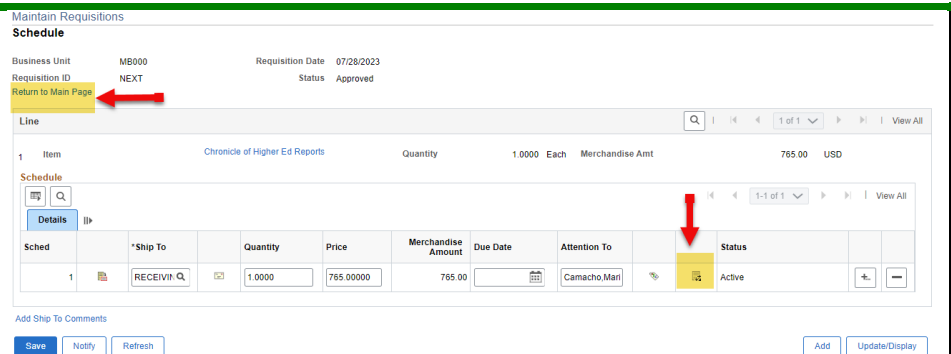


Figure 15: From the Schedule page, select the Distribution icon



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E. Distribution Section

If the initial settings for "Distribute By" and "Liquidate By" are configured as "Quantity" (defaulted from Requisition defaults - section - page 6), and there is a need to distribute the quantities in a way that does not allow them to be divided into precise whole numbers, then the option for "Distribute By" and "Liquidate By" can be switched to use the "Amount" instead.

13. Verify Chartstring for the specific line.
14. Percent – defaults 100% from requisition line. See Step 15 to split distribution. If not proceed to Step 16.
15. **ONLY IF APPLICABLE:** If split distribution is needed, click on the plus sign and adjust the percent field per line. (see Figure 24)

16. Click **OK**.
17. Click **Save** and Return to Main Page

The process for splitting the costs between two or more chartfields is the same. However, you have to first choose if you want to split by quantity (which is the default) or by amount.

Split by quantity example: You are purchasing 10 laptops. One chartfield will cover the cost of 5 laptops and a second chartfield will cover the cost of the other 5 laptops.

Split by amount example: You are purchasing 10 laptops. One chartfield will cover 75% of the cost of the 10 laptops and a second chartfield will cover the remaining 25%. Or one chartfield will contribute \$500 towards the cost of the 10 laptops and the second chartfield will cover the remaining cost.

Figure 16 Line 1 Distribution page – No split

Figure 17: Distribution Split Example (50/50)

Figure 18: Save and navigate to Main Page




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Step 7: Budget Check


On the **Maintain Requisition** page, you have one last chance to verify information entered before it is saved and printed. Once you print it, only the Purchasing Office can make changes to the information entered.

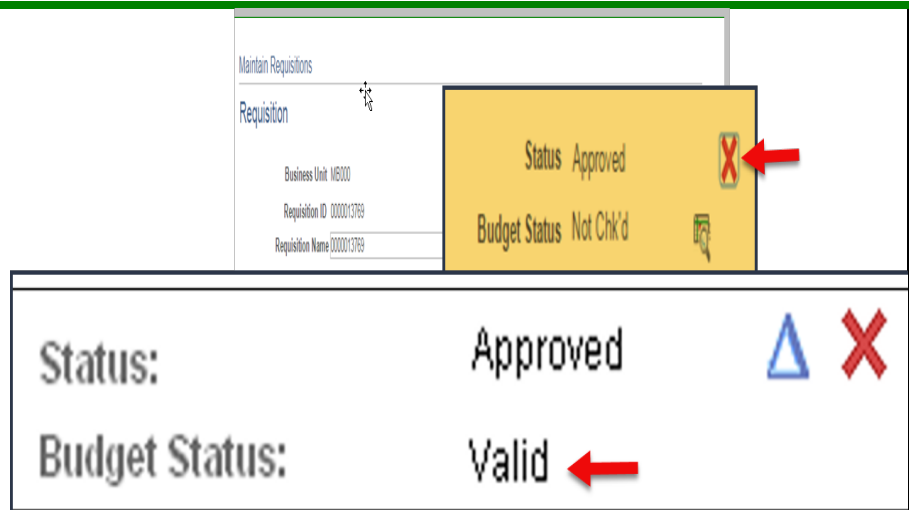
20. Status – status will default to Approved.

21. Cancel  - click [here](#) for procedures on how to Cancel a Requisition.

22. Budget Status – if status is **Not Chk'd**, click the  to begin the process.

23. Once completed you will have an **“Approved”** status and a **“Valid”** budget check

 **Note:**
Write down the Requisition number for future reference.



Maintain Requisitions
Requisition
Business Unit: 145000
Requisition ID: 000013769
Requisition Name: 000013769

Status: Approved
Budget Status: Not Chk'd

Status: Approved
Budget Status: Valid

Figure 19: Budget Check, this will update the Budget Status = Valid when budget check is successful




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Step 8: Print Requisition

A. Option 1- View Printable Version Link

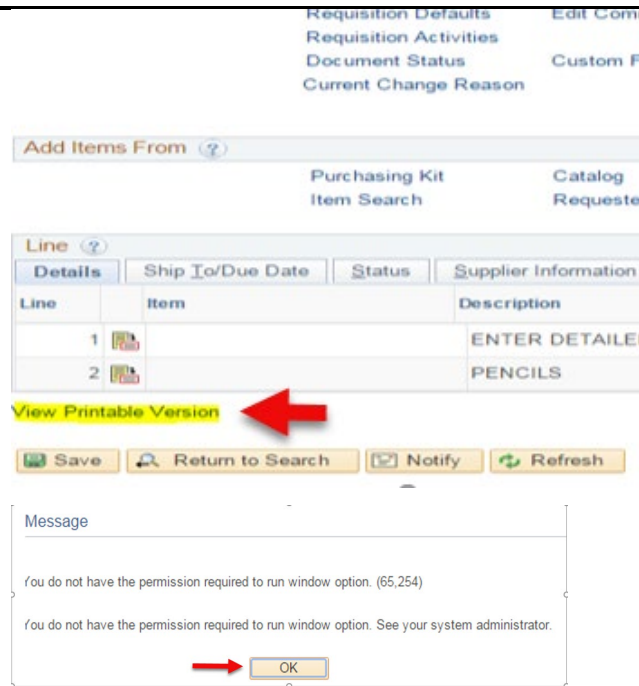
 **Note:** Write any required changes on the printed Requisition and your Purchasing Agent will make the necessary change in the Purchase Order.

From the Maintain Requisitions page:

1. Scroll to the bottom of the page.
2. Click [View Printable Version link](#) (Figure 20). This will trigger the print process.

3. Ignore the error message, click OK.
4. Navigation: Go to the Main Menu: Reporting Tools > Report Manager > Administration Tab (Figure 21).

5. Click Details link and retrieve PDF



Requisition Defaults Edit Com
Requisition Activities
Document Status Custom F
Current Change Reason

Add Items From (?)

Purchasing Kit Catalog
Item Search Requeste

Line (?)

Line	Item	Description
1		ENTER DETAILE
2		PENCILS

[View Printable Version](#)

Save Return to Search Notify Refresh

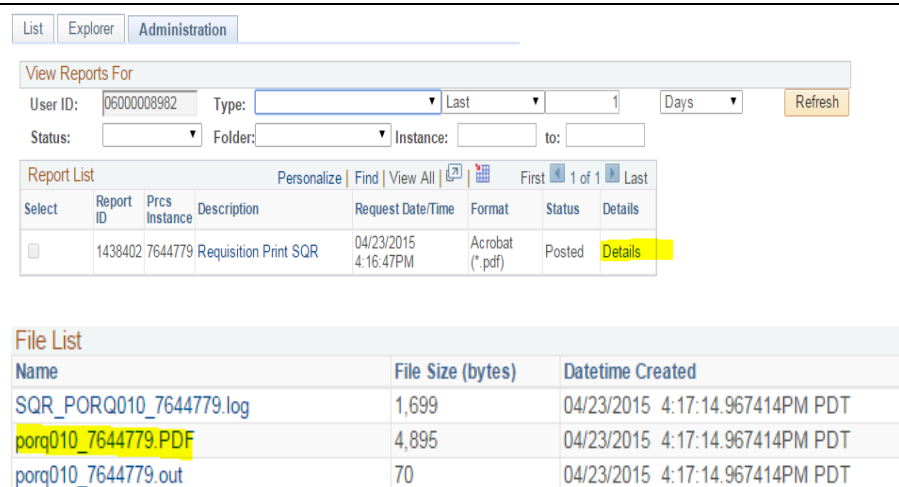
Message

You do not have the permission required to run window option. (65,254)

You do not have the permission required to run window option. See your system administrator.

OK

Figure 20: View Printable Version and Click OK and open Reporting Tools link.



List Explorer Administration

View Reports For

User ID: 06000008982 Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1438402	7644779	Requisition Print SQR	04/23/2015 4:16:47PM	Acrobat (*.pdf)	Posted	Details

File List

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_7644779.log	1,699	04/23/2015 4:17:14.967414PM PDT
porq010_7644779.PDF	4,895	04/23/2015 4:17:14.967414PM PDT
porq010_7644779.out	70	04/23/2015 4:17:14.967414PM PDT

Figure 21: Administration Tab: Select Details link and retrieve PDF



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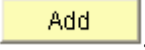
B. Option 2 – Requisition Print Page

This report can be run for a one or a range of requisitions.


1. Navigation: Main Menu > Purchasing > Requisitions > Reports > Print Requisition

2. If this is the first time you have run this report, create a new Run Control ID. Enter a Run Control ID (e.g. Print Requisition)

Select **Add a New Value** Tab.

Click .

If you have already set up a Run Control ID:

1. Select Find an Existing Value Tab.
2. Click .
3. Select the correct ID from the list (if this is the only Run Control, the page will open directly).

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

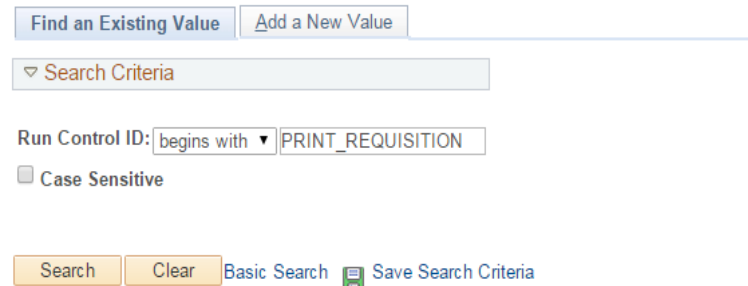


Figure 22: Create a new Run Control ID if necessary

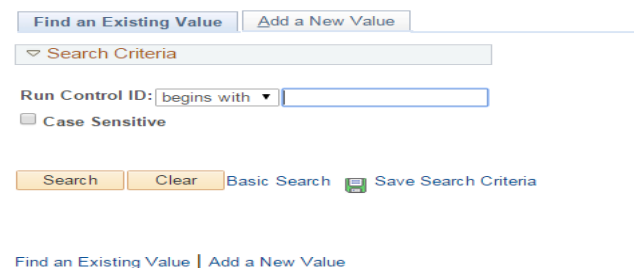
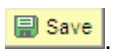



Figure 23: Find an Existing Value

4. **Business Unit** – use look up to select correct business unit code.

5. **Requisition ID** – enter the Requisition ID or use the look up to select the correct ID.

6. **Statuses to Include** – click .

7. Click . And click .

Print Requisition

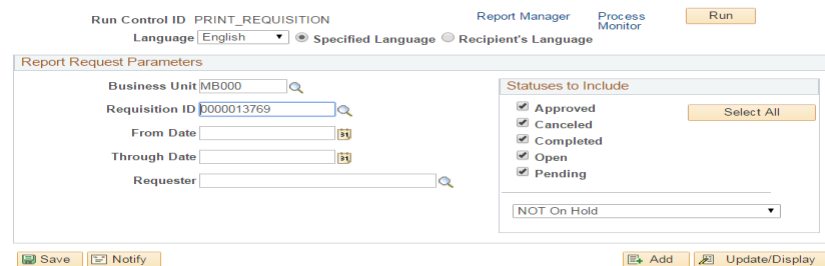


Figure 24: Run Control Set up



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8. **Select** – make sure the current report is selected.
9. **Type** – select **Web**.
10. **Format** – select **PDF**.
11. Click **OK**.
12. A **Process Instance** number will display on the top right of the Run Control Page.
13. Click the [Process Monitor](#) link.
14. The Process List will display (Figure 33).
15. Click the **Refresh** until:
Run Status = Success
Distribution status = “Posted”
16. Click [Details](#) link followed by [View Log/Trace](#).
17. Click on the Report Name ending with **.PDF**.
18. The report will open.

Process Scheduler Request

User ID: 06000008982 Run Control ID: PRINT_REQUISITION

Server Name: Run Date: 04/23/2015

Recurrence: Run Time: 4:57:20PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

Figure 25: Process Scheduler Request page (PDF format)

[Process List](#) | [Server List](#)

View Process Request For

User ID 06000008982 Type Last 1 Days

Server Name Instance to

Run Status Distribution Status ☒ Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7644786		SQR Report	PORQ010	06000008982	04/23/2015 4:57:20PM PDT	Success	Posted	Details
<input type="checkbox"/>	7644779		SQR Report	PORQ010	06000008982	04/23/2015 4:16:46PM PDT	Success	Posted	Details

Figure 26: Process List Tab

View Log/Trace

Report

Report ID: 1438407 Process Instance: 7644786 [Message Log](#)

Name: PORQ010 Process Type: SQR Report

Run Status: Success

Requisition Print SQR

Distribution Details

Distribution Node: FBCFSPSA Expiration Date: 06/07/2015

File List

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_7644786.log	1,673	04/23/2015 4:58:41.177245PM PDT
porq010_7644786.PDF	4,895	04/23/2015 4:58:41.177245PM PDT
porq010_7644786.out	70	04/23/2015 4:58:41.177245PM PDT

Figure 27: Open PDF Report File



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C. Report Output

Ship To: Receiving
100 Campus Center 35
Seaside CA 93955-8001

Requisition
Cal State Univ - Monterey Bay

Business Unit:	MB000	APPROVED
Req ID	0000013746	Date 04/13/2015 Page 1
Requester	Telephone 831/582-4169	Entered By

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgrm	Class	Project		Dist Amt	
1-1	CBV2 Park A Bike Composite Bicycle Vault			78500	4.0000	EA	1,425.00	5,700.00	
1-1-1	619800	MB500	1111			1111A			5,700.00
						<u>Line Total:</u>		5,700.00	
2-1	DV211-GV1-1 Park A Bike Varsity Bike Dock			78500	20.0000	EA	215.00	4,300.00	
2-1-1	619800	MB500	1111			1111A			4,300.00
						<u>Line Total:</u>		4,300.00	
3-1	DVK1 DV211 Varsity Dock Concrete Anchor Kit			78500	20.0000	EA	12.00	240.00	
3-1-1	619800	MB500	1111			1111A			240.00
						<u>Line Total:</u>		240.00	
						<u>Total Requisition Amount:</u>		10,240.00	

Figure 28: Printed Purchase Requisition

19. Route the requisition to the appropriate parties for signatures. Note: Adobe Sign is preferred.

20. **Email the completed requisition to the Procurement Department: procurement@csumb.edu**

NOTE: After appropriate signatures are obtained, route to the Procurement Office procurement@csumb.edu.



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Appendix

A. Find an Existing Requisition

1. Select the **Find and Existing Value** Tab.
2. **Business Unit** – use look up and select appropriate value.
3. Enter additional search criteria such as:
 - **Requisition ID** – enter requisition ID number.
4. Click Search for results to display.
5. Select correct Requisition ID to open the record.

Requisitions

Use the following search to look for an existing Requisition.

Business Unit:

Requisition ID:

Requisition Name:

Requisition Status:

Origin:

Requester:

Requester Name:

Hold From Further Processing ☐

☐ Case Sensitive

Search Results

View All First 1-2 of 2 Last

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
MB000	0000012446	(blank)	Approved	ONL	06000047787	Lasnik, Mark W	N
MB000	0000012300	(blank)	Approved	ONL	06000047787	Lasnik, Mark W	N

Figure 29: Find an Existing Requisition



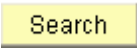
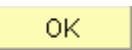
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B. Copy Requisitions

You have the option of copying the details from a previous requisition, if desired. You may copy any requisition, not just those that you've created in the past.

1. Create a new Purchase Requisition ([Steps 1 - 4](#)).
2. Click the [Copy From](#) link.
3. The Copy Requisition page will display.
4. **Requisition ID** – enter the Requisition ID or use the look up to find the requisition that you would like to copy.
5. Click .
6. Check the box to the left of the Requisition that you want to copy.
7. Click  and Budget Check when ready.

NOTE: All requisition information will be copied, but you can **make changes and additions before you save it as a new purchase requisition.**

Maintain Requisitions

Requisition

Business Unit MB000
Requisition ID NEXT

Status Approved
Budget Status Not Chk'd

Requisition Name [Copy From](#)

☐ Hold From Further Processing

Figure 30: Header default has "Copy From" link when creating a NEW Requisition

Maintain Requisitions

Copy Requisition

Header

Business Unit MB000
Requisition ID 0000013768
Requisition Name
Req Status
Requester
Requester Name
Requisition Date
Supplier SetID MB000
Supplier ID
Item SetID MB000
Item Description
Department
Origin
Card Number
To
Supplier Name
Item ID
Direct Ship ☐

Search

Set	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	0000013768	0000013768	Approved	ONL	06000008982

OK Cancel Refresh

Figure 31: Copy Requisition Page

Maintain Requisitions

Requisition

Business Unit MB000
Requisition ID NEXT

Status Approved
Budget Status Not Chk'd

Requisition Name [Copy From](#)

☐ Hold From Further Processing

Header

*Requester 06000008982 Camacho, Marie
*Requisition Date 04/23/2015
Origin ONL Online
*Currency Code USD Dollar
Accounting Date 04/23/2015

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	Personalize	Find
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	St	
1		post it notes	25.0000	EA	61500	2.00000	50.00	Ar	

Figure 32: Copied (Imported) requisition



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C. CFS Inquiry Pages:

To follow up on the status of a completed Purchase Requisition, you may use one or more of the following inquiry pages (see separate job aids for details):

1. **Requisition Document Status** – Main Menu > Purchasing > Requisitions > Review Requisition Information > Document Status Requisition
2. **Requisition Inquiry** - Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions
3. **CSU PO Remaining Balance Inquiry** – Main Menu > Purchase Orders > Review PO Information > CSU PO Remaining Balance Inq
4. **PO Inquiry** - Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders
5. **CSU PO Activity Detail Report** –
6. **CSU PO Life Cycle Report** – Main Menu > Purchasing > Requisitions > Reports > CSU PO Life Cycle Report Requires Requisition, PO or Voucher ID.

D. CSUMB Procurement Site

- a. Category Codes
- b. Direct Payment Requests
- c. New Vendor Onboarding (New Supplier) – [Payment Works Quick Guide](#)
- d. [Payment Matrix](#)
- e. ProCard Documents

E. Checking an Invoice Status

Submit Invoice to Accounts Payable: If Accounts Payable receives the invoice, they will forward it to the department.

The department is responsible for the following:

Verify that the invoice matches the Purchase Order by looking in the Purchase Order Inquiry: Main Menu > Purchasing > Purchase Orders > **Purchase Orders**

Search by Supplier Name or other available search criteria. Verify the following pieces of information in order to avoid an exception to the check generating process: amount, unit price, distribution amount (Amt or Qty), Sales Tax, Receiving.

1. If goods were shipped directly to the department send packing slip to Receiving so that the system is updated to "Received" status.
2. If receiving is required the receipt must be transacted in CFS in order for A/P to process payment.
3. If invoice does not match the PO, contact the supplier for clarification. If the PO needs to be altered, contact the Buyer. Note: To make changes to a PO, please submit a PO Alteration form to Procurement.



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4. Ensure that the signature of the approving official, who has the authority to sign on behalf of the department, is included.
5. Finally ensure that the invoice has the following information:
 - Received by
 - Date
 - P.O. number
 - Account #
 - Amount
 - Final Bill (Y/N)