

P2P Updates and Reminders

- **Berti the P2P Bot!**
- **Requisition Tracking**
- **How to Copy a Requisition**
- **P2P Reminders**
- **Questions and Resources**

BERTI

Don't have time to sift through the P2P information on our website? Ask Berti to do it for you! Berti will even let you know where it found the information.

- Instructions on how to use Berti:

https://www.csusm.edu/bfs/pcbo/archive_notices/berti_p2p_support.pdf

10/1 10:33 AM

Hi Berti, how do I copy a past requisition to a new requisition?



P2P Support Bot (Berti) AI generated 10/1 10:33 AM



Copying a Past Requisition to a New Requisition in CSUBUY

To copy a past requisition to a new requisition (cart) in the CSUBUY system, follow these steps:

Step-by-Step Instructions:

- Locate the requisition you would like to order again.
- Go to the ellipses ("Three dots") next to the requisition.
- Click on "Copy to New Cart."
- Follow the process as if you are creating the cart through shopping.
- Proceed to checkout as usual.

Important Note:

- Chartfields will not copy to the new cart, so you may need to re-enter this information before submitting the new requisition.

This process allows you to efficiently reorder items or replicate a previous requisition without starting from scratch, streamlining your procure-to-pay workflow ¹.



P2P CSUBUY – REQUISITION TRACKING

Did you know that you can use reports in P2P to track all of your requisitions? A guide is at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/export-reports.pdf.

How does it help?

- Track requisitions from the past year to determine which ones need to be renewed
- You can copy the past year's requisition to a new requisition for this year (don't forget to update the form info).
- This will help identify PO's that need to be closed.
- This will help identify PO's that require an invoice be submitted to AP.
- This is especially helpful with knowing when to start the IT review for an annual renewal.

P2P CSUBUY – REQUISITION TRACKING

Created Date: All ▾		Quick search		Q ⓘ	Add Filter ▾	Clear All Filters								?
PO Owner: Nance-Sotelo, ... ▾		×	Voucher Status: Partially Invoice... ▾		×	Voucher Pay Status: Paid, No Pay St... ▾								
◀ ▶		Page 2	of 3	21-40 of 56 Results				⚙ 20 Per Page ▾						
PO Number ▾	Supplier	Created Date/Time ⌚	PO Status ▾	Voucher Status	Voucher Pay Status	Voucher Payment Amount	Voucher Total	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▾		
... 2400041116	KLATU Networks Inc ⓘ	5/21/2025 8:28:05 AM	Completed	No Vouchers	No Pay Status		0.00 USD	201817815	Courtney Nance-Sotelo	Sent To Supplier	No Matches	1,566.00 USD		
... 2400040301	Fisher Scientific Company LLC ⓘ	5/15/2025 7:59:59 AM	Completed	Fully Invoiced	Paid		8,254.13 USD	201460817	Courtney Nance-Sotelo	Fully Shipped	Fully Matched	8,254.13 USD		
... 2400040217	Fisher Scientific Company LLC ⓘ	5/14/2025 12:25:51 PM	Completed	Partially Invoiced	Open		1,174.16 USD	201562176	Courtney Nance-Sotelo	Partially Shipped	Partially Matched	4,003.43 USD		
... 2400038897	VWR Funding Inc ⓘ	5/6/2025 2:57:19 PM	Completed	No Vouchers	No Pay Status		0.00 USD	201210696	Courtney Nance-Sotelo	Sent To Supplier	No Matches	921.60 USD		
... 2400038799	VWR Funding Inc ⓘ	5/6/2025 11:24:14 AM	Completed	No Vouchers	No Pay Status		0.00 USD	201190721	Courtney Nance-Sotelo	Sent To Supplier	No Matches	4,551.02 USD		
... 2400037848	Amazon.com ⓘ	4/30/2025 8:18:56 AM	Completed	Fully Invoiced	Paid		9.99 USD	200928743	Courtney Nance-Sotelo	Fully Shipped	Fully Matched	9.99 USD		

P2P CSUBUY – HOW TO COPY A REQUISITION

- See previous question to Berti!
- This is also in the CSUBUY End User Training presentation and recording on our website.
- Come to Office Hours for a live demo or assistance!
- You can copy from any requisition, not just your own!
- Double check that you are using the correct form type and update the information in the form (dates of service, updated pricing, updated details or information).

Copy to New Cart and Reorder

Learn how to Reorder items not in a PunchOut. (For Requests that contain **Forms** only.)

Copy to New Cart (entire requisition)

1. Locate the **requisition** you would like to order again
2. Go to the **ellipses ("Three dots")**.
3. Click "Copy to New Cart".
4. Follow process as if you created the cart through shopping
5. **Checkout**

Reorder (form or line from requisition)

1. Locate the **requisition** containing the form you wish to add to your active cart.
2. Go to the **ellipses ("Three dots")**.
3. Click Add to Active Cart.
4. **Checkout**

P2P CSUBUY – REMINDERS

1. Please see the PCBO Notice and information on how to handle a \$0 line on a requisition.
2. Please see FAQ's (item 4) on how to handle IT Software requisitions when a supplier is not responsive to the supplier invite.
3. How to click on the workflow step to see who the potential approvers are and see your requisition status.
4. What to do when someone leaves CSUSM? Please put in a ticket with their replacement.
5. Requisition Comments. All communications regarding a requisition should be done via req comments. Please be sure to add the intended recipient on the requisition comment. Remember to check comments!

Question Topic	Subject Matter Expert	Contact Info
Supplier Setup Issues	Accounts Payable	Check P2P or email suppliersetup@csusm.edu
DOA Issues	Financial Systems Operations	fso@csusm.edu
Invoices/Payment Status	Accounts Payable	Check P2P or email accountspayable@csusm.edu
IT Review	IITS	Message the IT reviewer on the requisition in P2P.

P2P CSUBUY – QUESTIONS

Questions?

Available Resources at: <https://www.csusm.edu/procurement/procurementservices/index.html>:

1. Training Videos
2. BERTI
3. Appointment Booking
4. Office Hours