

Change Request Process Guide

A Change Request (formally known as a Purchase Order Amendment - POA) allows requestors to make changes to a PO that has already completed workflow.

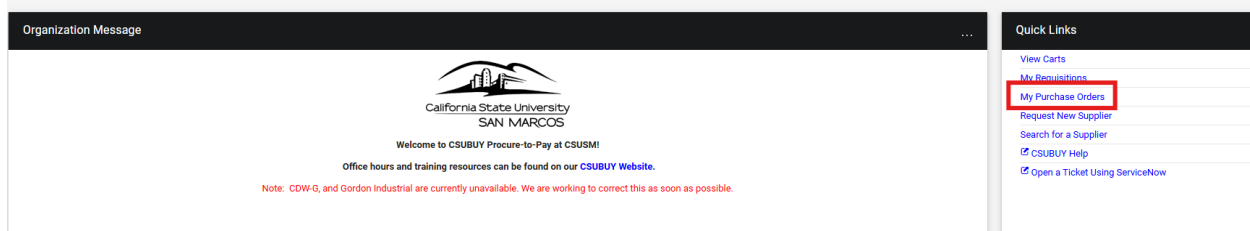
A Requestor can initiate a Change Request to make changes to a PO when the PO is not in a closed status.

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

Follow these steps to create a Change Request.

1. From the P2P home page, make sure that you are in the correct Shopping Persona and navigate to My Purchase Orders in the Quick Links section (or use the flyout menu).

Shop · Shopping Home Page



Organization Message

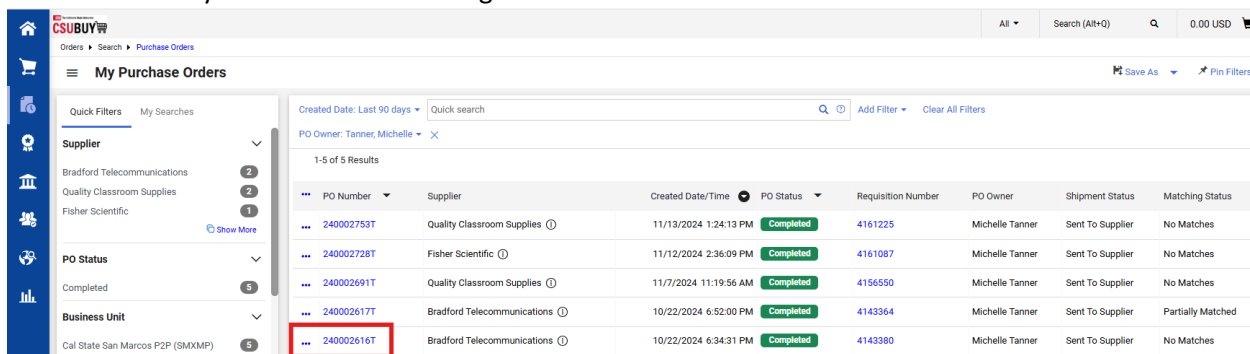
California State University
SAN MARCOS

Welcome to CSUBUY Procure-to-Pay at CSUSM!
Office hours and training resources can be found on our CSUBUY Website.
Note: CDW-G, and Gordon Industrial are currently unavailable. We are working to correct this as soon as possible.

Quick Links

- View Carts
- My Requisitions
- My Purchase Orders**
- Request New Supplier
- Search for a Supplier
- CSUBUY Help
- Open a Ticket Using ServiceNow

2. Select the PO you need to make changes to.



CSUBUY

Orders Search Purchase Orders

My Purchase Orders

Quick Filters My Searches

Supplier

- Bradford Telecommunications 2
- Quality Classroom Supplies 2
- Fisher Scientific 1

PO Status

- Completed 3

Business Unit

- Cal State San Marcos P2P (SMXMP) 3

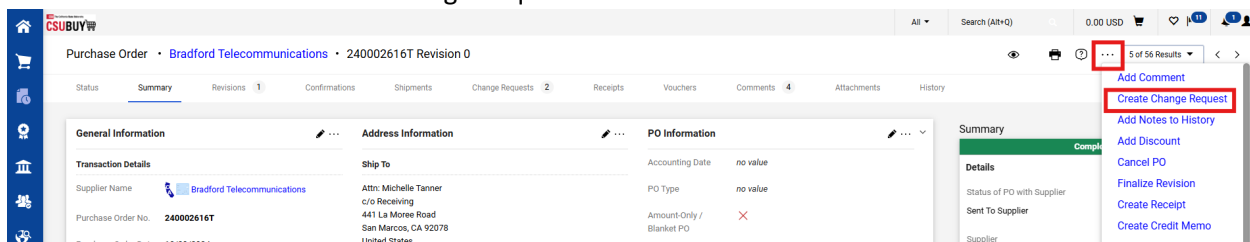
Created Date: Last 90 days Quick search

PO Owner: Tanner, Michelle X

1-5 of 5 Results

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status
240002753T	Quality Classroom Supplies	11/13/2024 1:24:13 PM	Completed	4161225	Michelle Tanner	Sent To Supplier	No Matches
240002728T	Fisher Scientific	11/12/2024 2:36:09 PM	Completed	4161087	Michelle Tanner	Sent To Supplier	No Matches
240002691T	Quality Classroom Supplies	11/7/2024 11:19:56 AM	Completed	4156550	Michelle Tanner	Sent To Supplier	No Matches
240002617T	Bradford Telecommunications	10/22/2024 6:52:00 PM	Completed	4143364	Michelle Tanner	Sent To Supplier	Partially Matched
240002616T	Bradford Telecommunications	10/22/2024 6:34:31 PM	Completed	4143380	Michelle Tanner	Sent To Supplier	No Matches

3. Click the ... and select Create Change Request



CSUBUY

Purchase Order · Bradford Telecommunications · 240002616T Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests 2 Receipts Vouchers Comments 4 Attachments History

General Information Address Information PO Information

Transaction Details

Supplier Name: Bradford Telecommunications

Purchase Order No: 240002616T

Purchase Order Date: 10/22/2024

Ship To

Attn: Michelle Tanner

c/o Receiving

441 La Moree Road

San Marcos, CA 92078

United States

Accounting Date: no value

PO Type: no value

Amount-Only / Blanket PO: X

Summary

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

4. 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.

Enter the Change Request Reason. 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

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](#)

Michelle Tanner (Prepared by, Prepared for) <mtanner@csusm.edu>

Tu McClurg (Approved Requisition) <fbcfspq@calstate.edu>

User with change request permission:

Bernice Choo (Approved) <bchoo@calstate.edu>

Kara Bush (Approved) <fbcfspq@calstate.edu>

Madhuri Dhadge (Approved) <mdhadge@calstate.edu>

Travis Vasceannie (Approved) <travis.Vasceannie@risenow.com>

Vipin Jenraj (Approved) <vjenraj@calstate.edu>

[add email recipient...](#)

Change Request Reason

Change requested to update the \$ amount on line 1. The original quote expired before the requisition was approved.

885 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):

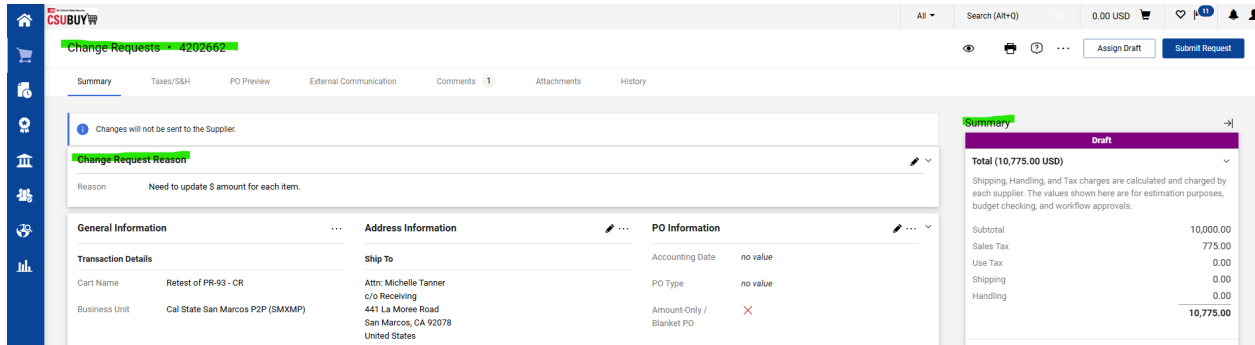
Attachment Type File Link/URL

Create Change Request Close

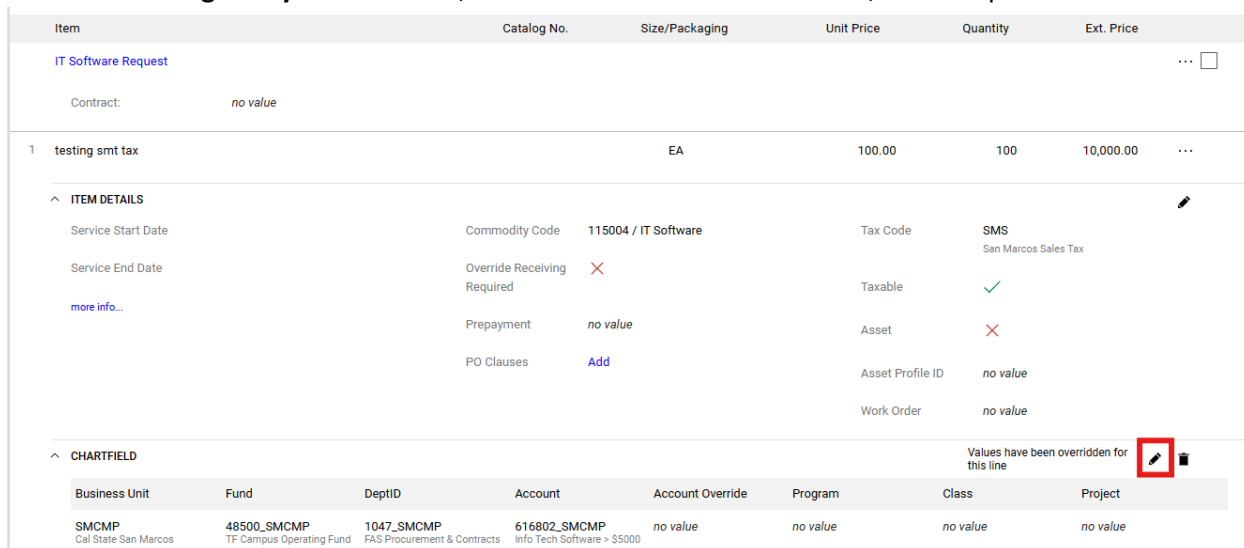
IF YOU ARE ADDING A LINE TO YOUR PO SKIP TO STEP 15. FOR ALL OTHER CHANGES, CONTINUE WITH STEP 5.

5. This will open your original requisition in the Change Request to allow for changes by way of the edit pencils.

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.

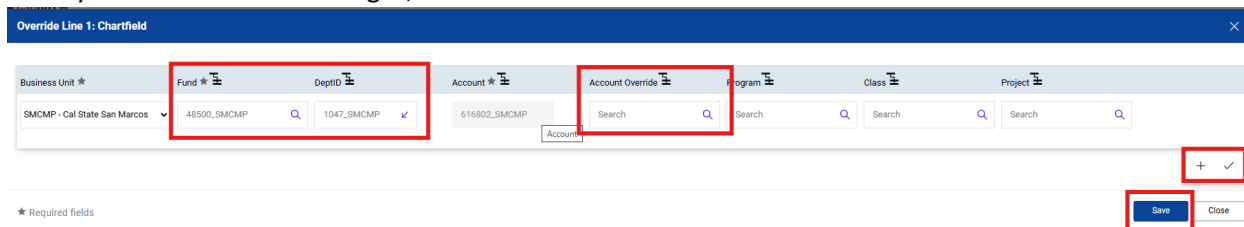


6. To make changes to your chartfield, scroll down to the chartfield lines, click the pencil.



7. 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.



8. To make changes to the \$ amount, quantity, product description, etc., 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: <i>no value</i>		
1 testing smt tax		EA

^ **ITEM DETAILS**

Service Start Date Commodity Code 115004 / IT Software

Service End Date Override Receiving Required ✗

9. Click on Form Fields.

CSUBUY

← Procurement Request • Goods and Services Request

Suppliers **Form Fields** Review And Submit

Suppliers

Selected Supplier

Supplier Name	Doing Business As	Fulfillment Centers
Seven Interpreting LLC		Cal State San Marcos P2P (S)

10. Click on Cost Details.

CSUBUY

← Procurement Request • Goods and Services Request

Suppliers **Form Fields** Review And Submit

General Information Other Goods & Services **Cost Details**

Quotes & Other Attachments

11. Make edits to the Cost Details as applicable then click Save on Change Request at the top right of your screen.


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					

12. Click the left facing arrow (Back to Change Request) to get out of the form.

 Procurement Request • Goods and Services Request

Back to Change Request

Suppliers Form Fields Review And Submit

General Information Other Goods & Services **Cost Details**

13. All Change Requests require Attachments (revised quote, etc.) and/or Internal Notes.

To add Internal Notes, click the pencil, add your notes, then Save.

To add an Attachment, click Add, add your attachments, then 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

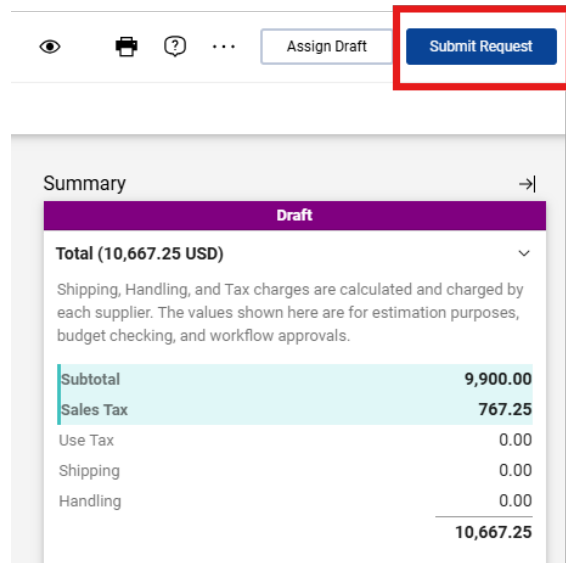
Prepared by: Michelle Tanner
Prepared for: Michelle Tanner
Buyer: 68000117876
Michelle Tanner
Ad-Hoc Approver: Select

Internal Notes and Attachments

Internal Note: no value

Internal Attachments **Add**

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

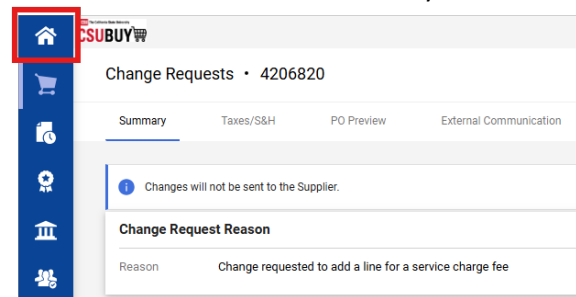


To add line to a PO

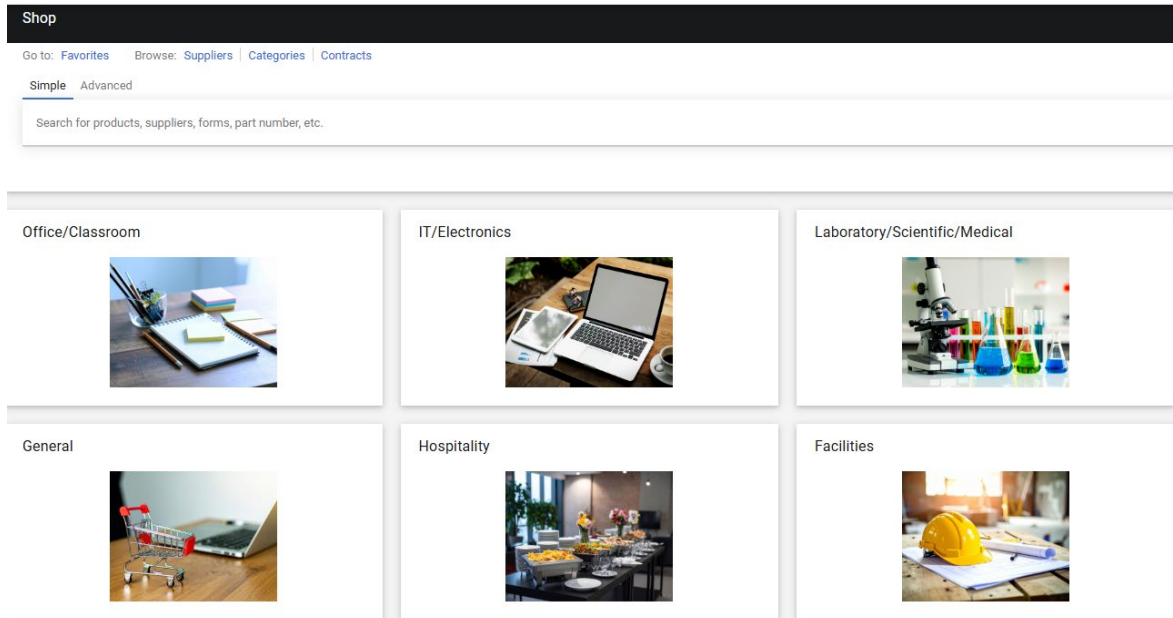
An item (line) can only be added to Purchase Orders that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added. **A Change Request cannot be made for Punchout Supplier Purchase Orders.**

15. Complete steps 1 – 4 above. This will open your original requisition in the Change Request. Take note of the Change Request number as you will need to refer to it in a later step.

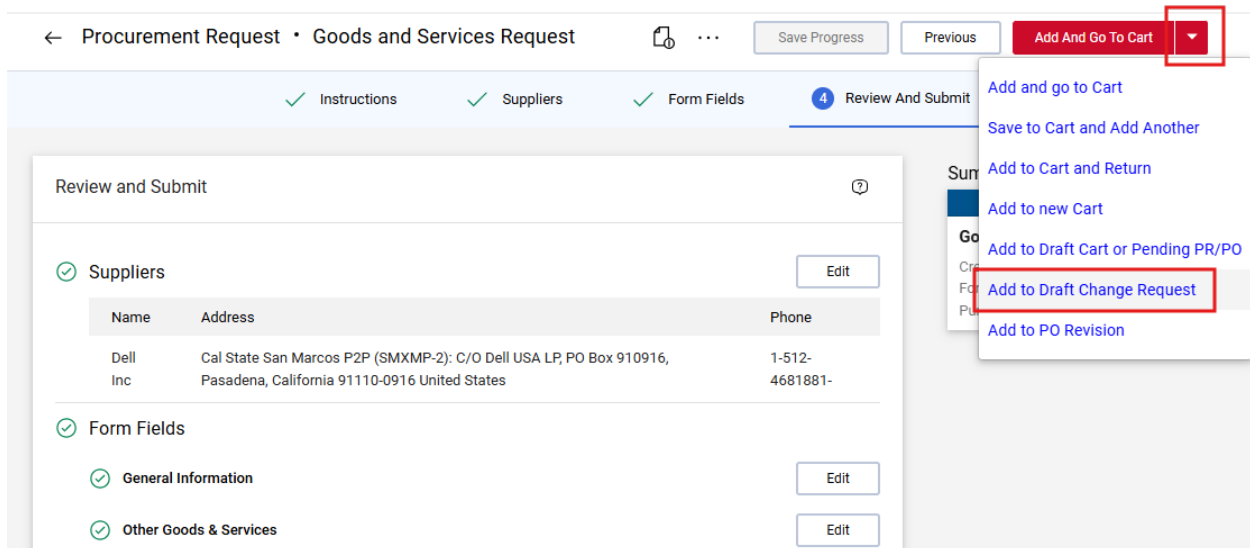
16. Click on the home icon in the flyout to return to the Shopping Home Page.



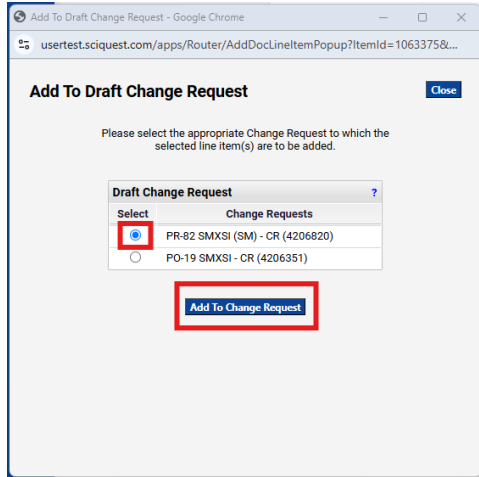
17. Click on the appropriate CSU Form Request type from the Shop menu. The Form Request must align with the Form Request Type of the original Purchase Order (PO), if not, an error message will be displayed.



18. Complete the Suppliers and Form Fields pages (using the red Next button at the top right of your screen to move through the pages). Once on the Review and Submit page, click on the drop down for Add and go to Cart and select Add to Draft Change Request.



19. A list of change requests in Draft status that are owned by the logged-in user, with the same supplier as the item(s) to be added is displayed. Select a change request and click “Add to Change Request”. An error message is displayed if there are no suitable change requests.



20. Return to the Purchase Order you initiated the Change Request for and open it.

The screenshot shows the "My Purchase Orders" page in CSUBUY. A table lists purchase orders with columns for PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, and PO Owner. The PO number 240002413T is highlighted in red.

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	Intech	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

21. Click on the Change Request tab and open the Change Request.

The screenshot shows the "Purchase Order" details page for "Quality Classroom Supplies" and "240002413T Revision 0". The "Change Requests" tab is selected and highlighted in red. Below the tabs, a table shows "Records found: 1" with columns for Status, Number, Owner, and Created. The change request number 4206820 is highlighted in red.

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

22. Review the newly added line and details.

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.

If you need to make changes to the chartfield, follow steps 6-7 above.

23. All Change Requests require Attachments (revised quote, etc.) and/or Internal Notes. To add Internal Notes, click the pencil, add your notes, then Save.

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

CSUBUY
Change Requests • 4202662

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

Bill To

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

Chartfield

Values vary by line.

Other Participant Information Internal Notes and Attachments

Prepared by Michelle Tanner Internal Note no value

Prepared for Michelle Tanner Internal Attachments Add

Buyer 68000117876 Michelle Tanner

Ad-Hoc Approver Select

24. 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