

## 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.

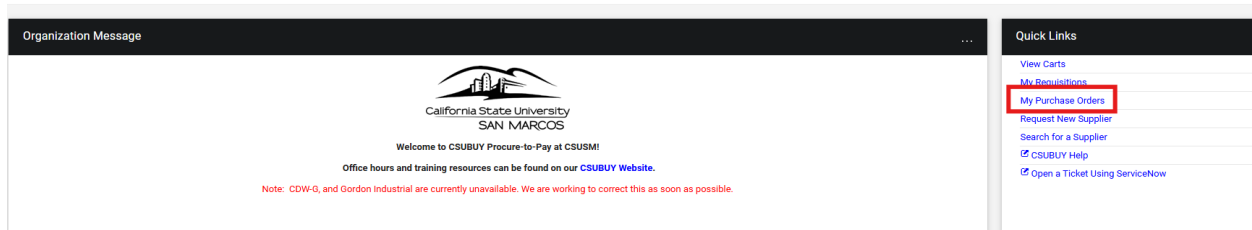
### It is important to note:

- A Requestor can initiate a Change Request to make changes to a PO when the PO is not in a closed status.
- If the 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.
- Change Requests should not be submitted for any Purchase Order that has a pending voucher (the Change Request will have errors). Before making changes, check to see if there are any pending (unpaid) vouchers. Voucher(s) need to be backed out (if appropriate) by Accounts Payable, before a Change Request can be made.
- Change Requests to change a Commodity Code or Chartfield should not be submitted for any Purchase Order that has vouchers matched and paid. Before making changes, check to see if there are any matched and paid vouchers.
- 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



## 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

Show More

PO Status

- Completed 5

Business Unit

- Cal State San Marcos P2P (SMXMP) 5

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

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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

Details

Status of PO with Supplier

Sent To Supplier

Supplier

5 of 56 Results

- 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) <fbcfspqr@calstate.edu>

User with change request permission:

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

☐ Kara Bush (Approved) <fbcfspqr@calstate.edu>

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

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

☐ Vipin Jenraj (Approved) <vjjenraj@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.

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Change Requests - 4202662

Summary

Taxes/SGH

PO Preview

External Communication

Comments

Attachments

History

Changes will not be sent to the Supplier.

Change Request Reason

Reason: Need to update \$ amount for each item.

General Information

Address Information

PO Information

Transaction Details

Ship To

Accounting Date

PO Type

Amount-Only / Blanket PO

Cart Name

Business Unit

Attn: Michelle Tanner

441 La Moree Road

San Marcos, CA 92078

United States

Summary

Draft

Total (10,775.00 USD)

Subtotal

Sales Tax

Use Tax

Shipping

Handling

10,000.00

775.00

0.00

0.00

0.00

10,775.00

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

| 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 115004 / IT Software</div> <div>Tax Code SMS</div> <div>San Marcos Sales Tax</div> </div> <div> <div>Service End Date</div> <div>Override Receiving Required</div> <div>Prepayment no value</div> <div>PO Clauses Add</div> </div> <div> <div>Taxable</div> <div>Asset</div> <div>Asset Profile ID no value</div> <div>Work Order no value</div> </div> |                 |                |            |          |            |     |

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.

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

8. To make changes to the \$ amount, quantity, product description, etc., click on the form name.

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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             |
| <div>ITEM DETAILS</div> <div> <div>Service Start Date</div> <div>Commodity Code 115004 / IT Software</div> <div>Service End Date</div> <div>Override Receiving Required</div> </div> |                 |                |

## 9. Click on Form Fields.

The screenshot shows the CSU BUY portal interface. At the top, there is a breadcrumb trail: "← Procurement Request • Goods and Services Request". Below this, there is a navigation bar with three tabs: "Suppliers", "Form Fields" (which is highlighted with a red box), and "Review And Submit". The main content area is titled "Suppliers" and contains a section for "Selected Supplier". This section has a table with three columns: "Supplier Name", "Doing Business As", and "Fulfillment Centers". The table contains one row with the following data: "Seven Interpreting LLC", "Cal State San Marcos P2P (S)", and an empty cell.

## 10. Click on Cost Details.

The screenshot shows the CSU BUY portal interface. At the top, there is a breadcrumb trail: "← Procurement Request • Goods and Services Request". Below this, there is a navigation bar with three tabs: "Suppliers", "Form Fields", and "Review And Submit". The "Form Fields" tab is selected, and within it, there are three sub-tabs: "General Information", "Other Goods & Services", and "Cost Details" (which is highlighted with a red box). The main content area is titled "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.

The screenshot shows the CSU BUY portal interface. At the top, there is a breadcrumb trail: "← Procurement Request • Goods and Services Request". Below this, there is a navigation bar with three tabs: "Suppliers", "Form Fields", and "Review And Submit". The "Form Fields" tab is selected, and within it, there are three sub-tabs: "General Information", "Other Goods & Services", and "Cost Details". The "Cost Details" sub-tab is selected, and within it, there are three sub-sections: "General Information", "Other Goods & Services", and "IT Software or Maintenance Details" (which is highlighted with a red box). The "IT Software or Maintenance Details" section contains a form with the following fields: "Unit Price" (100.00), "Unit of Measure" (EA - Each), "Quantity" (100), "Total" (10,000.00), "Product Description" (testing smt tax), "Taxable" (Yes), "Catalog No." (empty), and "Commodity Code" (115004 - IT Software).

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

The screenshot shows the CSU BUY portal interface. At the top, there is a breadcrumb trail: "← Procurement Request • Goods and Services Request". Below this, there is a navigation bar with three tabs: "Suppliers", "Form Fields", and "Review And Submit". The "Form Fields" tab is selected, and within it, there are three sub-tabs: "General Information", "Other Goods & Services", and "Cost Details". The "Cost Details" sub-tab is selected, and within it, there are three sub-sections: "General Information", "Other Goods & Services", and "IT Software or Maintenance Details". The "IT Software or Maintenance Details" section contains a form with the following fields: "Unit Price" (100.00), "Unit of Measure" (EA - Each), "Quantity" (100), "Total" (10,000.00), "Product Description" (testing smt tax), "Taxable" (Yes), "Catalog No." (empty), and "Commodity Code" (115004 - IT Software). A red box highlights the "Back to Change Request" button at the top left of the form.

**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.

CSU BUY

Change Requests • 4202662

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

**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.

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.

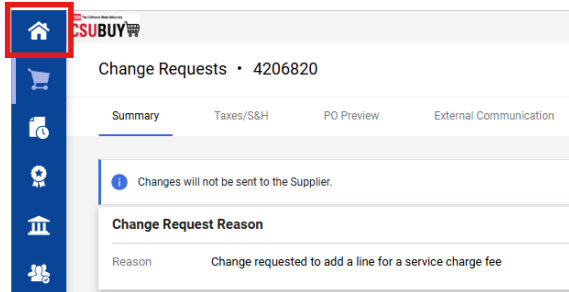
|              |                  |
|--------------|------------------|
| Subtotal     | 9,900.00         |
| Sales Tax    | 767.25           |
| Use Tax      | 0.00             |
| Shipping     | 0.00             |
| Handling     | 0.00             |
| <b>Total</b> | <b>10,667.25</b> |

## To add line to a PO

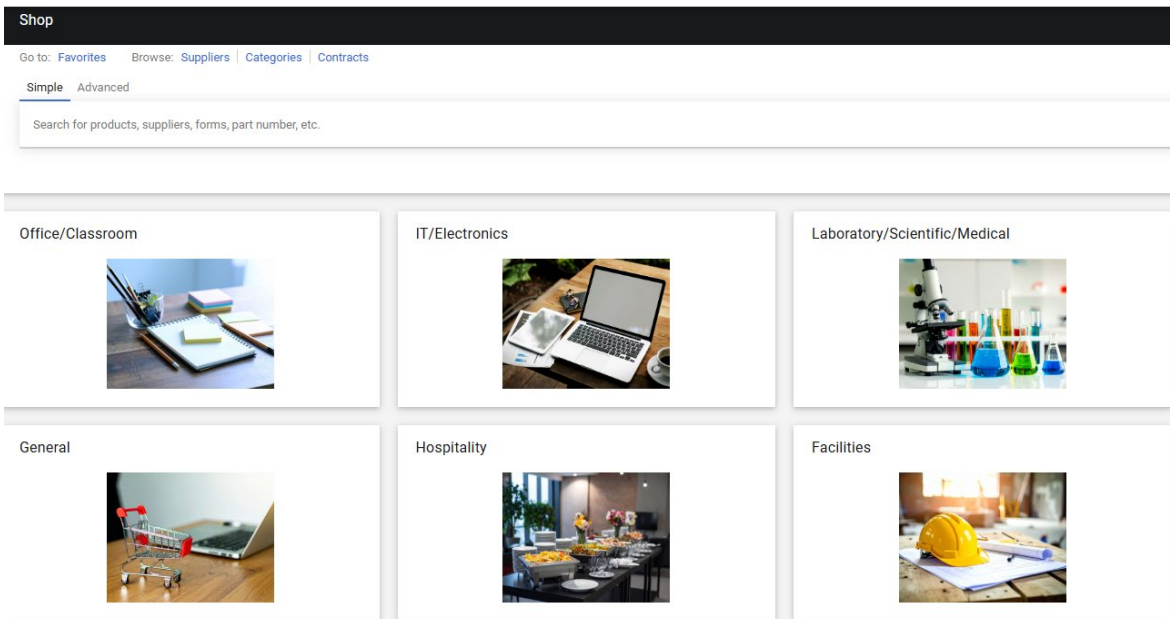
An item (line) can only be added to Purchase Orders that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added. **A Change Request cannot be made for Punchout Supplier Purchase Orders.**

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.

← Procurement Request • Goods and Services Request

Save Progress Previous Add And Go To Cart

Instructions Suppliers Form Fields 4 Review And Submit

Review and Submit

Suppliers Edit

| Name     | Address                                                                                                           | Phone          |
|----------|-------------------------------------------------------------------------------------------------------------------|----------------|
| Dell Inc | Cal State San Marcos P2P (SMXMP-2): C/O Dell USA LP, PO Box 910916, Pasadena, California 91110-0916 United States | 1-512-4681881- |

Form Fields

General Information Edit

Other Goods & Services Edit

Add and go to Cart  
Save to Cart and Add Another  
Add to Cart and Return  
Add to new Cart  
Add to Draft Cart or Pending PR/PO  
Add to Draft Change Request  
Add to PO Revision

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.

Add To Draft Change Request - Google Chrome

usertest.sciquest.com/apps/Router/AddDocLineItemPopup?ItemId=1063375&...

Add To Draft Change Request Close

Please select the appropriate Change Request to which the selected line item(s) are to be added.

Draft Change Request ?

| Select                           | Change Requests                 |
|----------------------------------|---------------------------------|
| <input checked="" type="radio"/> | PR-82 SMXSI (SM) - CR (4206820) |
| <input type="radio"/>            | PO-19 SMXSI - CR (4206351)      |

Add To Change Request

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

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Orders > Search > Purchase Orders

My Purchase Orders (Modified)

Created Date: All Quick search

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 |

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

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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 |

22. Review the newly added line and details.

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.

Change Requests • 4202662

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

Bill To

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

Chartfield

Values vary by line.

Other Participant Information

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](#)

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 |