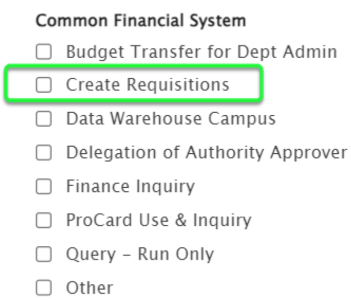
CSUBUY P2P Frequently Asked Questions (FAQ's)

FAQ's related to Requisitions and Purchase Orders

1. **How do I get access to CSUBUY P2P?**
   a. Please work with FSO to complete the Common Financial System Access Form at https://www.csusm.edu/iits/services/idm/forms/finance_form.html to request CFS security access.
      i. You'll need to enter your Department Manager's Name (MPP) so it can be approved
      ii. For CSUBUY access, select Create Requisitions



2. **How do I create a requisition in CSUBUY P2P?**
   a. Make sure that you have access to CSUBUY P2P. If you do not, follow the instructions for question 1 above.
   b. View the End User Training Recording and Presentation, and/or a Requisition "Start to Finish" Training videos at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training

3. **What is a CSU Form Request?**
   a. A form request is simply a form in CSUBUY used to start a requisition.

4. **I started a form request and when I search for my supplier they are not showing. Can I use Supplier Not Known?**
   a. Supplier Not Known should only be used with the Independent Contractor Request form. Please view the Instructions for submitting an Independent Contractor Agreement guide at https://www.csusm.edu/procurement/procurementservices/independentcontractor.html
   b. Before starting a form request, you should search for your Supplier and makes sure they are set up. The Supplier needs to be active for shopping before you start your form request.
   c. Supplier Not Known may be used for IT Software requisitions in coordination with Procurement. If a supplier is not responding or cooperating in the supplier setup after five (5) days and three (3) follow up attempts, the requestor may move forward with Supplier Not Known and include documentation of their setup attempts. Please note that if the purchase does not meet ProCard requirements, Procurement is not able to move forward with the purchase unless the supplier is set up.
   d. For further instructions, see #14 below.

5. **How do I change my business unit when I already have lines in my Shopping Cart?**
    a. You must change your business unit before you start a form request. If a form request has already been started and you have added lines to your Shopping Cart, you will need to delete that Shopping Cart and start over. To change your business unit, go to the CSUBUY home page, click the head icon at the top right corner, and select Change Shopping Persona.
    b. Before starting a form request, ensure you are in the correct Shopping Persona/Business Unit, and make sure you do not have an active cart in progress (create new cart).

6. **What do I need to include for Internal Notes and Attachments on my requisition, and are they required?**
    a. Internal Notes should include your Supplier contact name and email address, and the CSUSM contact name and email address. You should also include any other notes that you feel may be needed by the Procurement and Contracts team.
    b. Internal Attachments should include, at the very least, the quote or proposal provided by the Supplier based on your scope of work. You should also include any other documentation that the Supplier has provided you with. Other documents may be required based on the type of purchase you are making.
    c. Internal Notes and Attachments are required for all requisitions EXCEPT for Punchout supplier requisitions.

7. **How do I add attachments to my requisition after I have submitted it?**
    a. You cannot make changes to a requisition that you have submitted and is in the Workflow. There are two options once you have submitted the requisition:
        i. Locate "who" has the requisition in the workflow and add a Comment asking that they return the requisition to you. Once returned, you can add the attachments to Internal Notes and Attachments and resubmit.
        ii. Add the attachment as a Comment.

8. **How do I add internal notes to the requisition after I have submitted it?**
    a. You cannot make changes to a requisition that you have submitted and is in the Workflow. There are two options once you have submitted the requisition:
        i. Located "who" has the requisition in the workflow and add a Comment asking that they return the requisition to you. Once returned, you can add the notes to Internal Notes and Attachments and resubmit (preferred method).
        ii. Add the notes as a Comment. Be aware that your notes will remain as a comment and not show up as an Internal Note on the requisition.

9. **How will I know if my IT Software purchase is approved for ProCard after the IT review is completed?**
    a. Once the requisition is in Procurement Review, the assigned Procurement Buyer/Analyst will reach out via Comments to let you know if ProCard is an option for your purchase based on the IITS "risk" review and the dollar amount. You may either proceed with ProCard or move forward with a Purchase Order based on the submitted requisition in this situation.
        i. If you decide to move forward using your ProCard the Buyer with "reject" the requisition and indicate further instructions in the Comments.
        ii. If you decide to move forward using a Purchase Order the Buyer will complete Procurement Review and the requisition will transition to a Purchase order. Please note: if you were advised to use Supplier Not Known, Procurement is not able to move forward with the purchase unless the supplier is set up and active in P2P. It is your responsibility to submit the request in P2P (Request New Supplier) and to follow up to make sure the supplier is added. Once the supplier is added, please add a Comment to your requisition letting the Buyer know that they have been added.

10. **Where can I enter my campus Deliver To (the Deliver To list on the requisition is very limited and does not include my location)?**
    a. Choose an official Deliver To Location in the system. Do not attempt to add a new deliver to address. The system will reject it.
    b. If you want to specify your location on campus (suite/room number), you can add it in the Ship To, Attn: field.

11. **How do I search for a Supplier? What if they do not show up?**
    a. Please view the <u>Requesting a New Supplier</u> instructions at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#suppliers
    b. Work with Accounts Payable.

12. **How can I buy gift cards?**
    a. Please reach out to Accounts Payable for more information on compliant options for gift card purchases.

13. **My chartfield won't approve, what do I do?**
    a. Check to make sure you are in the correct Shopping Persona/Business Unit.
    b. If you are under the BU SMXND, make sure you have included a Project code in the appropriate field.
    c. Try to validate the chartfield you have entered. If that does not work, and it is a chartfield you have used previously, please reach out to FSO.

14. **How do I set up a default chartfield that I use all the time?**
    a. Please view the <u>Setting Default Addresses and Chartfield</u> training resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training

15. **How do I update the Supplier Name on a requisition?**
    a. Note: only Independent Contractor requisitions should move forward with "Supplier Not Known" as the supplier without Procurement preapproval.
    b. You cannot make changes to a requisition while it is in the workflow. If it is a submitted requisition, the Buyer can return it to the requestor to edit in their draft cart following the steps listed below.
    c. If the Requestor lets the Buyer know that the supplier is set up and provides the supplier's name, the Buyer can add the supplier during the Procurement Review step. This can be accomplished through the Comments.
    d. If it is a draft cart, follow these steps:
        i. Open the shopping cart
        ii. Click on the request form type from the draft cart
        iii. Click Suppliers
        iv. Search for the Supplier. Once the correct supplier is found, click Select.
        v. Confirm that the Supplier updated. If so, Click Back to Cart
        vi. Proceed to Checkout, then Submit Request.

16. **How do I see why my requisition was returned?**
    a. Go to the Shopping Cart in the flyout, and View Carts. Click on the cart name.
        i. Click History.
        ii. Under the Action column, find the row that shows the requisition was returned/rejected.
        iii. If the requisition was returned by the User "system", check the Note column for the reason.
        iv. If the requisition was returned by an individual, check the Note column for the reason. If you need more information, please reach out to that individual directly.

17. How do I see why my Change Request was returned?

   a. Go to the Orders in the flyout, then My Orders, then My Change Requests. Click on the Change Request.
      i. Click History.
      ii. Under the Action column, find the row that shows the change request was returned/rejected.
      iii. If the change request was returned by the User "system", check the Note column for the reason.
      iv. If the change request was returned by an individual, check the Note column for the reason. If you need more information, please reach out to that individual directly.

18. Where can I see how much money is left on the line(s) of my PO.

   a. Search for the Purchase Order in the quick search field. Click on the Voucher tab. From here you can see all vouchers that have been matched. At the Line Detail you can see the amount that is still open, and the amount that has been invoiced.

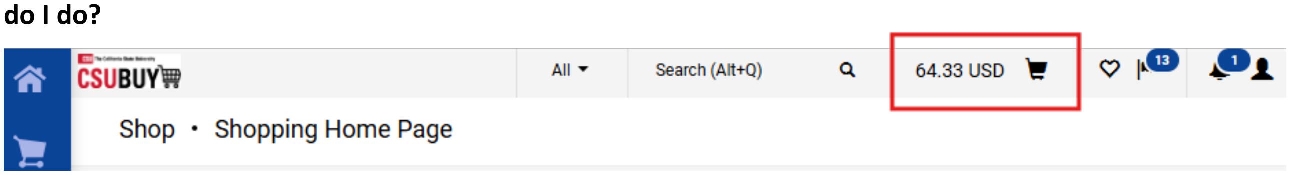
19. I have a default chartfield but I need to use a different one. How can I change it on my current order

   a. Please view the Updating Chartfields training resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training

20. The Account field is grayed out when I try to enter my chartfield. What do I do if I need to change it?

   a. The Account Code is generated from the line item's Commodity Code. The first step it to review the Commodity Code to make sure it is correct. If it is not, change the Commodity Code at the line and see if the Account Code changes. If you still need to change the Account Code, use the Account Code Override field. Note: using the Account Code Override field will generate an additional workflow step before the PO is sent to the supplier. It is suggested that you check with Accounting before proceeding so that your PO is not held up.

21. I have a shopping cart showing on my Home page and need to create a new shopping cart (requisition). What do I do?



   a. If you want to save that active cart and start another:
      i. Go to the Shopping Cart in the flyout, and View Carts.
      ii. The active cart will be noted as "Active" next to the Cart Number.
      iii. To start a new shopping cart/requisition, click Create Cart at the top righthand side of the screen.
   b. If you want to delete that cart entirely and start another:
      i. Click into the cart from the Home page
      ii. Click the trash can.
      iii. The cart will clear from the Home page and now show $0.00. You can start a new shopping cart by selecting the correct CSU Form Request from the home screen.

22. My Bill To address is not showing as an option to select on the Edit Address Information page, what do I do?

   a. Make sure that you are shopping under the correct Shopping Persona for that Bill To address.
      i. While in the Edit Address Information screen, click the magnifying glass in the Search additional field.
      ii. Select the correct Bill To address.

23. How do I add or remove a DOA Approver?

   a. Please visit www.csusm.edu/fso/common-forms and fill out the appropriate form request.
   b. Work with FSO.

24. **How do I add a line to a requisition?**
    a. If the requisition has not yet been submitted to workflow, view the How to Add a Line to a Requisition training resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training
    b. If the requisition is already in workflow, but not yet a PO, send a Comment to the current workflow approver and ask them to return the requisition to you by selecting Return to Requisitioner in the approval menu. Once the requisition is back in your shopping carts, follow the instructions in (a) above.
    c. If the requisition is already a PO, view the Change Request Process for Requesters training resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training

25. **How do I delete a line from a requisition?**
    a. If the requisition has not yet been submitted to workflow, scroll to the line and click the ellipses (…) at the line you want to delete, select Remove.
    b. If the requisition is already in workflow, but not yet a PO, send a Comment to the current workflow approver and ask them to return the requisition to you by selecting Return to Requisitioner in the approval menu. Once the requisition is back in your shopping carts, follow the instructions in (a) above.

26. **There is a discount on my quote, how do I enter that on my requisition lines?**
    a. Enter the discounted amount in the Cost Details on the line(s)
        i. Finish building your shopping cart and Proceed to Checkout.
        ii. In the Item Line box, click the pencil.
            1. Check the box next to Contains Discount.
            2. Click Save.
        iii. Repeat for each line where a discount was applied.

27. **I am leaving the University, what do I need to do to make sure my requisitions (or other roles) are reassigned to someone else?**
    a. Submit a ticket in P2P requesting a change.
        i. For instructions on submitting a ticket in P2P, view the Enter a CSUBUY Support Ticket support resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training
        ii. In the Description field, include your separation date and the name and title of the individual(s) who will serve as your replacement for each of your P2P roles.

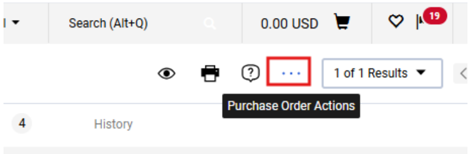
28. **How do I make a change (chartfield, cost, etc.) to a requisition?**
    a. If the requisition is already in workflow, but not yet a PO, send a Comment to the current workflow approver and ask them to return the requisition to you by selecting Return to Requisitioner in the approval menu. Once the requisition is returned it will go back to your Draft Cart for you to make changes and resubmit.
    b. If the requisition is already a PO, view the Change Request Process for Requesters training resource located at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html#training

29. **Is it ok to purchase HP toner from HP or Amazon?**
    a. No. All HP and Xerox toner must be purchased from the IRG punchout. If you try to purchase from another supplier, your requisition will be returned by Procurement.
    b. See the PCBO notices sent 9/11/25 and 11/14/25 for more information.

30. How do I print (or PDF) a copy of a PO?

a. Use the search bar at the top of the CSUBUY P2P home page to find the PO.

b. Click the ellipses, at the top of the page, to view the Purchase Order Actions



c. From the menu, select Print PO

d. This will open a printable screen for you to print or create a PDF.