

# CSUBUY, Procure to Pay (P2P) *End User Training*

# Agenda

Module 1- Introduction

Module 2- Basic Navigation

Module 3- Supplier

Module 4- Punchout Catalogs

Module 5- Form Requests

Module 6- Detailed Functionality

Module 7- Purchase Orders

Module 8- Receiving

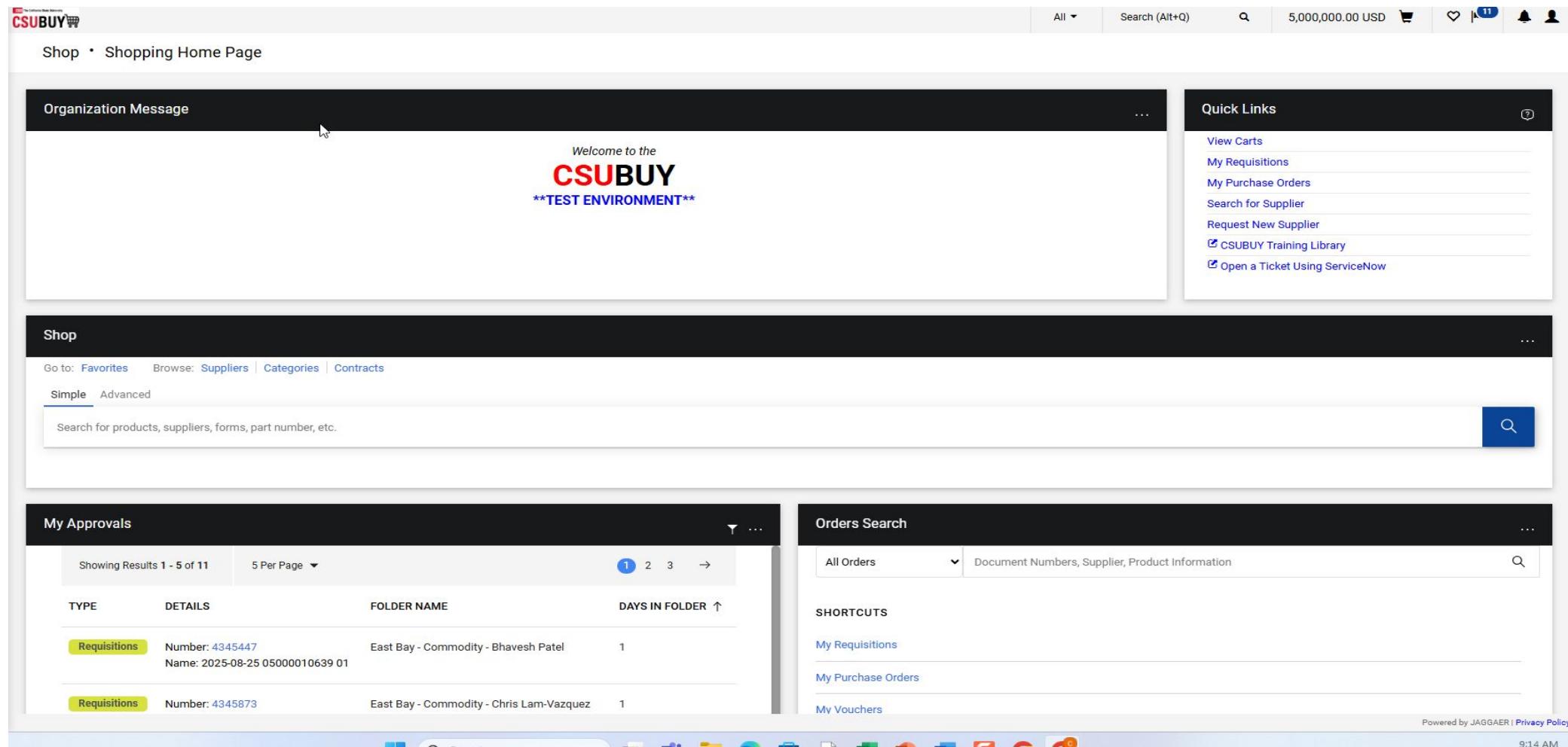
Module 9 - Payment (Voucher)

# Module 1- Introduction

- What is CSUBuy P2P?
- P2P vs. CFS
- Integration
- Roles and Permissions

# What is CSUBUY?

CSUBUY is the implementation of strategic, standardized procurement processes that allows for the elimination of manual touchpoints and steps resulting in efficiencies through automation, risk mitigation and cost savings for the California State University



The screenshot shows the CSUBUY test environment homepage. At the top, there is a navigation bar with a logo, a search bar, and a cart icon showing 11 items. Below the navigation bar is a banner titled "Organization Message" with a "..." button. The main content area features a "Welcome to the CSUBUY" message with "TEST ENVIRONMENT" in blue text. To the right is a "Quick Links" sidebar with links to "View Carts", "My Requisitions", "My Purchase Orders", "Search for Supplier", "Request New Supplier", "CSUBUY Training Library", and "Open a Ticket Using ServiceNow". Below the main message is a "Shop" section with a search bar and links to "Favorites", "Suppliers", "Categories", and "Contracts". The "Simple" tab is selected. A search bar with a magnifying glass icon is present. At the bottom left is a "My Approvals" section showing results for requisitions, and at the bottom right is an "Orders Search" section with a search bar and "SHORTCUTS" links to "My Requisitions", "My Purchase Orders", and "My Vouchers". The bottom of the screen shows a taskbar with various application icons.

Organization Message ...

Welcome to the  
**CSUBUY**  
**\*\*TEST ENVIRONMENT\*\***

Quick Links

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

Shop

Go to: [Favorites](#)   [Browse: Suppliers](#) | [Categories](#) | [Contracts](#)

[Simple](#) [Advanced](#)

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results 1 - 5 of 11   5 Per Page

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER
Requisitions	Number: 4345447 Name: 2025-08-25 05000010639 01	East Bay - Commodity - Bhavesh Patel	1
Requisitions	Number: 4345873	East Bay - Commodity - Chris Lam-Vazquez	1

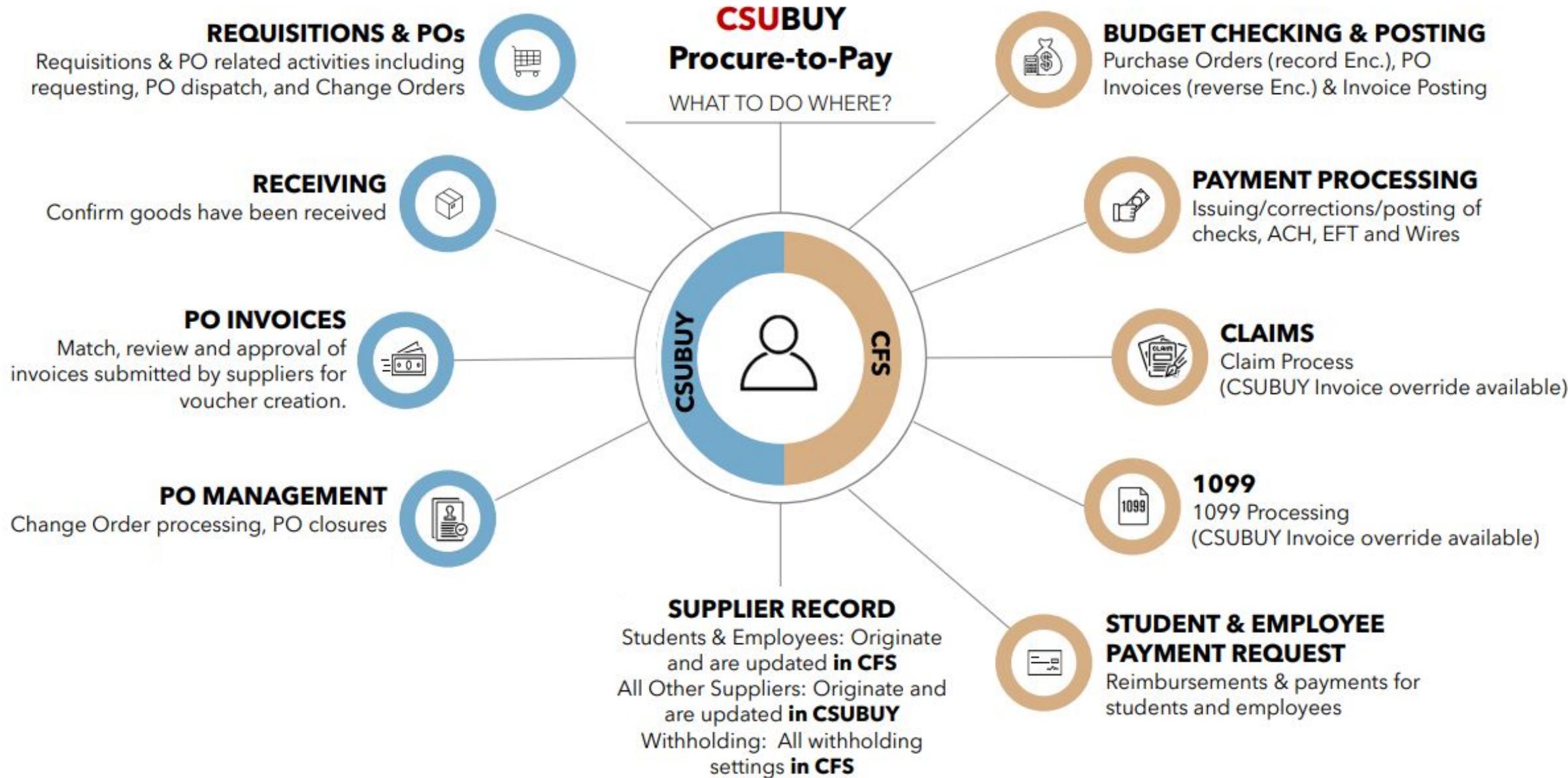
Orders Search

All Orders  Document Numbers, Supplier, Product Information

SHORTCUTS

[My Requisitions](#)  
[My Purchase Orders](#)  
[My Vouchers](#)

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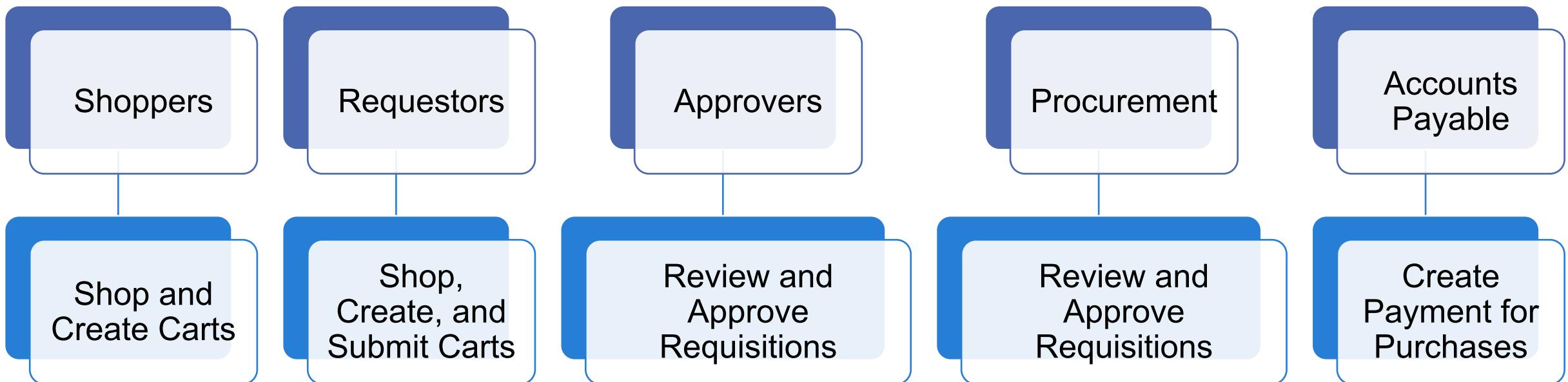


# P2P- Roles and Permissions

- **Shopper**- Ability to create shopping carts and assign to a requestor to submit into workflow.
- **Requestor**- Ability to query, create and submit requisitions.
- **Approver**- Ability to review and approve requisitions (Compliance Review) Examples: HR, IT, Fleet, EH&S....etc
- **DOA Approver**- Ability to review and approve requisitions (Financial Review)

# Who Uses CSUBUY?

- Overview of the user groups that use CSUBUY for purchasing.



# Q&A

# Module 2- Basic Navigation

- Profile Settings
- Bill To/Ship To Set Up
- Notifications
- Default Settings

# CSUBUY P2P Login –Need to update once P2P link is posted on Financial Services Home page and Procurement homepage



# Shopping Home Page

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

CSUBUY

Dashboards • Shopping Home Page

All ▾

Search (Alt+Q)

5,000,000.00 USD

11

Organization Message

Welcome to the  
**CSUBUY**  
**\*\*TEST ENVIRONMENT\*\***

Quick Links

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

Shop

Go to: Favorites Browse: Suppliers | Categories | Contracts

Simple Advanced

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results 1 - 5 of 11

5 Per Page ▾

1 2 3 →

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 4345447 Name: 2025-08-25 05000010639 01	East Bay - Commodity - Bhavesh Patel	1

Orders Search

All Orders

Document Numbers, Supplier, Product Information

SHORTCUTS

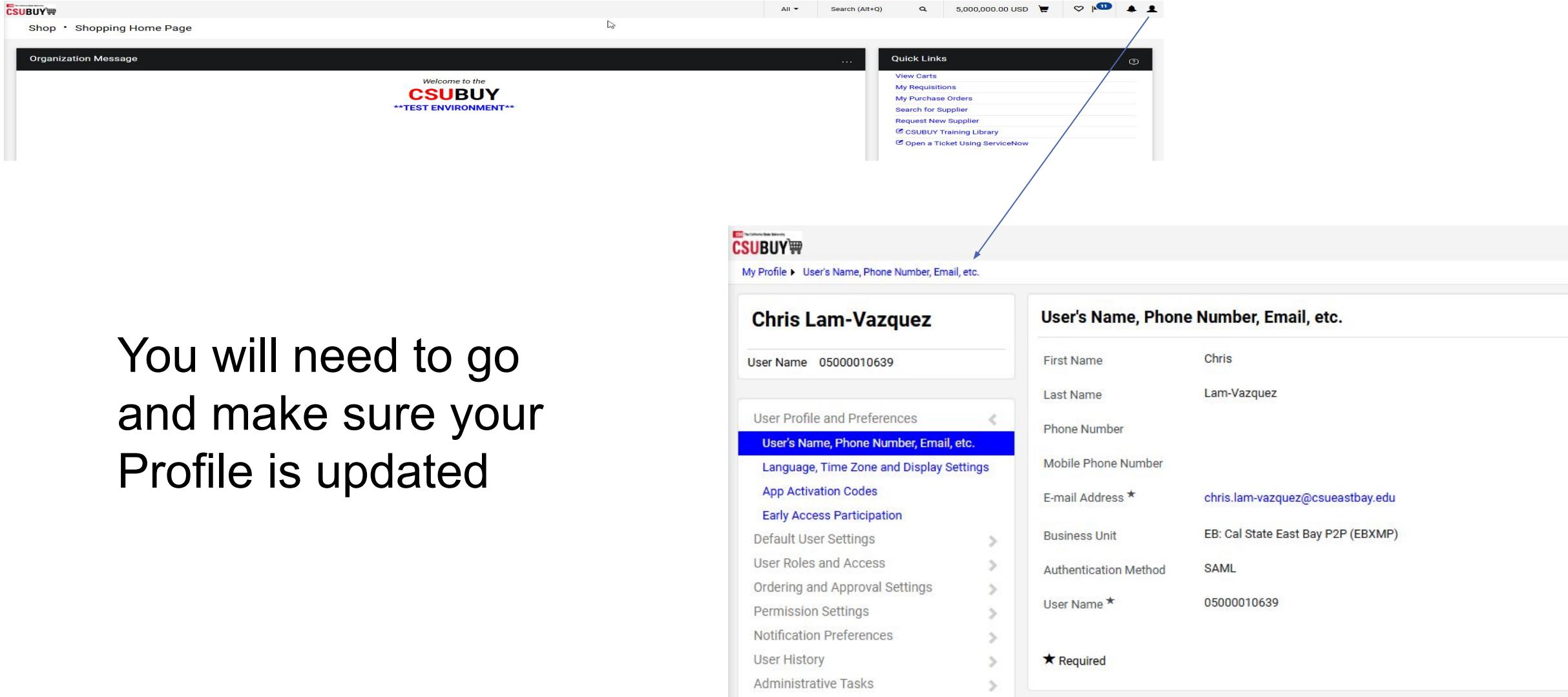
My Requisitions

My Purchase Orders

Menu Search

- Shopping Cart and Total
- Heart – Bookmarks
- Flag- Action Items
- Bell- Notification
- Person- Profile

# How to Access Profile Settings



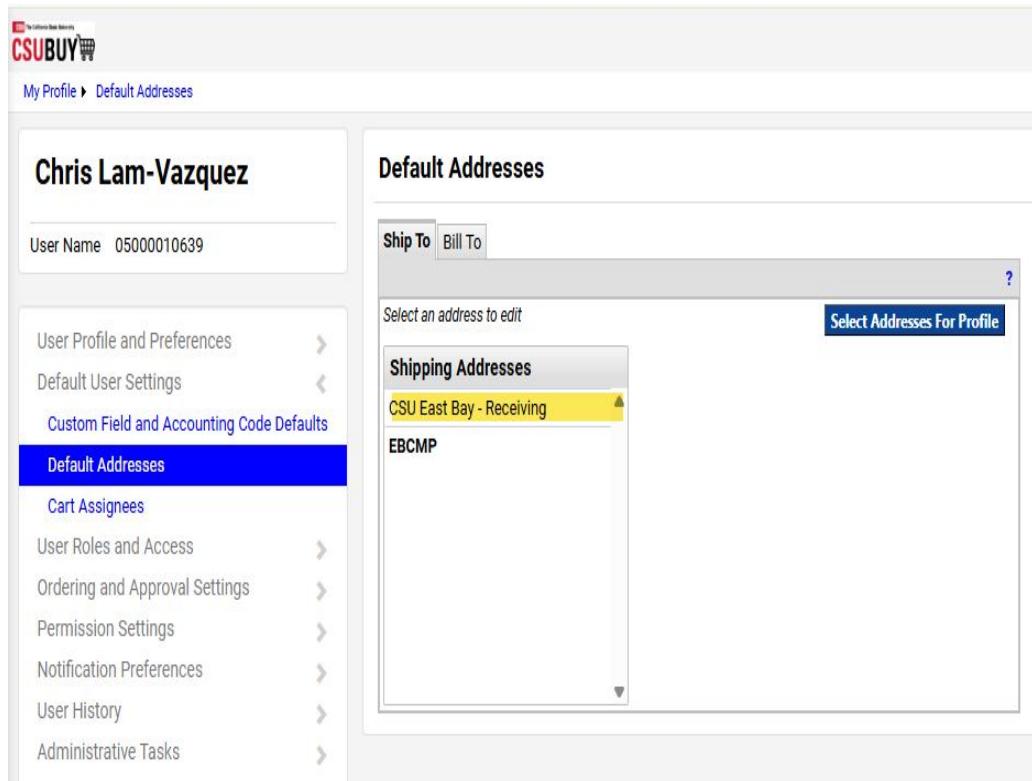
The image shows a screenshot of the CSUBUY test environment. At the top, there is a navigation bar with a shopping cart icon, a search bar, and a user icon. Below the navigation bar, there is an 'Organization Message' and the CSUBUY logo with the text 'Welcome to the CSUBUY \*\*TEST ENVIRONMENT\*\*'. To the right of the logo is a 'Quick Links' menu with options like 'View Carts', 'My Requisitions', 'My Purchase Orders', 'Search for Supplier', 'Request New Supplier', 'CSUBUY Training Library', and 'Open a Ticket Using ServiceNow'. A blue arrow points from the user icon in the top right to the 'User Profile and Preferences' section on the left. The main content area shows a user profile for 'Chris Lam-Vazquez' with a user name of '05000010639'. A blue box highlights the 'User's Name, Phone Number, Email, etc.' link in the 'User Profile and Preferences' menu. To the right, a table displays user information:

User's Name, Phone Number, Email, etc.	
First Name	Chris
Last Name	Lam-Vazquez
Phone Number	
Mobile Phone Number	
E-mail Address *	chris.lam-vazquez@csueastbay.edu
Business Unit	EB: Cal State East Bay P2P (EBXMP)
Authentication Method	SAML
User Name *	05000010639

**★ Required**

**You will need to go and make sure your Profile is updated**

# Update Default Address- Ship to and Bill to



My Profile > Default Addresses

**Chris Lam-Vazquez**

User Name 05000010639

**Default Addresses**

Ship To Bill To

Select an address to edit

**Shipping Addresses**

CSU East Bay - Receiving

EBCMP

User Profile and Preferences

Default User Settings

Custom Field and Accounting Code Defaults

**Default Addresses**

Cart Assignees

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

## Default Addresses

**Ship To** **Bill To**

Select an address to edit

**Select Addresses For Profile** **Delete Address**

**Shipping Addresses**

CSU East Bay - Receiving

EBCMP

**Edit Selected Address**

Nickname: CSU East Bay - Receiving

Default:

Current Default Address: EBCMP

**Address**

Attn: \*★ Chris Lam-Vazquez

Contact Line 2: c/o Shipping and Receiving

Address Line 1: 25800 Carlos Bee Blvd

City: Hayward

State: CA

Zip Code: 94542-3000

Country: United States

**Save**

## Default Addresses

**Ship To** **Bill To**

Select an address to edit

**Select Addresses For Profile** **Delete Address**

**Billing Addresses**

CSU East Bay - Campus Bill To

**Edit Selected Address**

Nickname: CSU East Bay - Campus Bill To

Default:

Current Default Address: CSU East Bay - Campus Bill To

**Address**

Contact Line 1: Accounts Payable, CSU East Bay

Address Line 1: 25800 Carlos Bee Blvd

City: Hayward

State: CA

Zip Code: 94542-3000

Country: United States

**Save**

# Shopping Home Page

CSUBUY

Shop • Shopping Home Page

Organization Message

Welcome to the  
**CSUBUY**  
**\*\*TEST ENVIRONMENT\*\***

Quick Links

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

Shop

Go to: Favorites Browse: Suppliers | Categories | Contracts

Simple Advanced

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results 1 - 5 of 11 5 Per Page

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER
Requisitions	Number: 4345447 Name: 2025-08-25 05000010639 01	East Bay - Commodity - Bhavesh Patel	1
Requisitions	Number: 4345873	East Bay - Commodity - Chris Lam-Vazquez	1

Orders Search

All Orders Document Numbers, Supplier, Product Information

SHORTCUTS

My Requisitions  
My Purchase Orders  
My Vouchers

❖ Quick Links  
❖ Fly out Menu

# Set Up Your Notification Preferences

## • Notifications Preferences

### Notification Preferences: Shopping, Carts & Requisitions

Prepared By - Cart Assigned Notice ⓘ	None
Prepared By - PR line item(s) rejected ⓘ	None
Prepared By - PR rejected/returned ⓘ	None
Cart Assigned Notice ⓘ	None
Receive PR and PO notifications for Carts Assigned to Me ⓘ	None
Assigned Cart Processed Notification ⓘ	None
Assigned Cart Deleted Notification ⓘ	None

- ❖ Notifications are individual
- ❖ You can customize options
- ❖ Turning on/off Email or Notifications per type

*Notifications are globally defaulted and can be modified by the user.*

Home

CSUBUY

Shop (Alt+P)

By Keyword  Search...

Go To

Shopping Home

Advanced Search

View Favorites

View Forms

Browse By

Suppliers

Categories

Contracts

Shopping

My Carts and Orders

Admin

View Carts

My Requisitions

My Purchase Orders

Search for Supplier

Request New Supplier

CSUBUY Training Library

Open a Ticket Using ServiceNow

Welcome to the  
**CSUBUY**  
**\*\*TEST ENVIRONMENT\*\***

...  
...

Shop

Go to: Favorites Browse: Suppliers | Categories | Contracts

Simple Advanced

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results 1 - 5 of 11 5 Per Page

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Requisitions	Number: 4345873	East Bay - Commodity - Chris Lam-Vazquez	1

Orders Search

All Orders  Document Numbers, Supplier, Product Information

SHORTCUTS

My Requisitions

My Purchase Orders

My Vouchers

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<https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1756414524960#>

Note: Shop Fly Out—Browse By Suppliers will give you only CSUEB approved suppliers ready for shopping.

Home  Orders > Search > All Orders

Shop

Orders 

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Menu Search

Search All Orders

Quick search  Date: Last 90 days  Quick search  Add Filter  20 Per Page 

All Orders

Requisitions

Purchase Orders

Change Requests

Procurement Requests

Vouchers

Receipts

1-20 of 73 Results

Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount		
Purchase Order	Pending	Bhavesh Patel	8/27/2025 2:24:42 PM		Acme Corporation 	298.44 USD		
Purchase Order	Complete	Chris Lam-Vazquez	8/27/2025 9:09:09 AM	8/27/2025 9:09:35 AM	Acme Corporation 	429.60 USD		
Requisition	Pending	Chris Lam-Vazquez	8/26/2025 4:34:01 PM		Outstanding Officiating 	5,000.00 USD		
Requisition	Pending	Chris Lam-Vazquez	8/26/2025 4:18:28 PM		Edwin's Equipment New & Refurbished 	3,765.50 USD		
Purchase Order	Pending	Gisella Higgins	8/26/2025 3:44:15 PM		Acme Corporation 	10,000.00 USD		
Requisition	Pending	Chris Lam-Vazquez	8/25/2025 2:17:21 PM		BD Biosciences, Inc 	443.00 USD		
Voucher	Pending	Chris Lam-Vazquez, Sonia Libiran	8/22/2025 3:40:30 PM		Acme Corporation 	450.00 USD		
Patel, Bhavesh		<input type="checkbox"/> 4345063	Requisition	Pending	Lana Lewis	8/22/2025 10:29:47 AM	Acme Corporation 	415.31 USD
Libiran, Sonia		<input type="checkbox"/> 731460	Receipt	-	Chris Lam-Vazquez	8/20/2025 1:05:28 PM	8/20/2025 1:06:44 PM	Academic Recruiting Services 
Lewis, Lana		<input type="checkbox"/> 240003511T	Purchase Order	Pending	Chris Lam-Vazquez	8/20/2025 12:59:35 PM		Acme Corporation 
Higgins, Gisella		<input type="checkbox"/> 4341988	Requisition	Complete	Chris Lam-Vazquez	8/20/2025 12:41:12 PM	8/20/2025 12:59:38 PM	Acme Corporation 
 See More		<input type="checkbox"/> C002430T	Voucher	Pending	Bhavesh Patel	8/20/2025 11:45:12 AM		Acme Corporation 
Approved By		<input type="checkbox"/> 731427	Receipt	-	Bhavesh Patel, Nicole Yu	8/20/2025 10:33:12 AM	8/20/2025 10:33:33 AM	Acme Corporation 
		<input type="checkbox"/> 731435	Receipt	-	Chris Lam-Vazquez, Sonia Libiran	8/20/2025 10:31:47 AM	8/20/2025 10:32:32 AM	BD Biosciences, Inc 
		<input type="checkbox"/> 731397	Receipt	-	Chris Lam-Vazquez, Sonia Libiran	8/20/2025 10:30:26 AM	8/20/2025 10:33:19 AM	Steelcase Distributor 
		<input type="checkbox"/> 731395	Receipt	-	Chris Lam-Vazquez, Lana Lewis	8/20/2025 10:30:23 AM	8/20/2025 10:52:10 AM	Staples 

Home  Accounts Payable ▶ Vouchers ▶ Search For Vouchers 

Shop Orders Contracts Accounts Payable Suppliers Sourcing Reporting

My Drafts Search Quick Filters My Searches Created Date: Last 90 days Quick search  Add Filter Clear All Filters 

**Accounts Payable** 

Vouchers Receipts

AP Home View Draft Vouchers Search For Vouchers Search Direct Pay Requests Create New Voucher, Credit Memo...

20 Per Page

Supplier	PO Number	Voucher Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status	Total Amount
Acme Corporation ①	240003511T	Pending	8/22/2025 3:40:30 PM			0.00 USD	8/22/2025 4:06:32 PM	Manual	PO Voucher	In Process	450.00 USD
Acme Corporation ①	240003497T	Pending	8/20/2025 11:45:12 AM	9/19/2025		0.00 USD	8/20/2025 11:46:08 AM	Manual	PO Voucher	In Process	4,468.00 USD
Acme Corporation ①	240003497T	Pending	8/20/2025 9:57:37 AM	9/19/2025		0.00 USD	8/20/2025 10:02:45 AM	Manual	PO Voucher	In Process	4,468.00 USD
Academic Recruiting Services ①	240003383T	Pending	8/20/2025 9:49:19 AM	9/4/2025		0.00 USD	8/20/2025 9:56:05 AM	Manual	PO Voucher	In Process	12.00 USD
Steelcase Distributor ①	240003473T	Complete	8/20/2025 9:43:53 AM	9/19/2025		0.00 USD	8/20/2025 9:56:03 AM	Manual	PO Voucher	Payable	300.00 USD
Academic Recruiting Services ①	240003498T	Pending	8/20/2025 9:43:51 AM	9/19/2025		0.00 USD	8/20/2025 9:56:01 AM	Manual	PO Voucher	In Process	10,010.00 USD
Acme Corporation ①	240003497T	Pending	8/20/2025 9:43:48 AM	8/20/2025		0.00 USD	8/20/2025 10:05:30 AM	Manual	PO Voucher	In Process	4,840.81 USD
Acme Corporation ①	240003474T	Pending	8/19/2025 4:10:41 PM	8/19/2025		0.00 USD	8/20/2025 11:27:36 AM	Manual	PO Voucher	In Process	1,750.00 USD
Academic Recruiting Services ①	DP0000180T	Pending	8/19/2025 12:18:01 PM	9/18/2025		0.00 USD	8/19/2025 12:18:01 PM	Automated	PO Voucher	In Process	10,000.00 USD

Show More

**Voucher Type** ▾ 10

PO Voucher

**Voucher Source** ▾ 8

Manual

**Business Unit** ▾

EB: Cal State East Bay P2P (EBXMP) 10

**Invoiced By** ▾ 3

Libiran, Sonia

Patel, Bhavesh 3

Menu Search

CSUBUY

Suppliers > Manage Suppliers > Search for a Supplier

All Search (Alt+Q) 5,000,000.00 USD Logout

### Search Suppliers

Relationship: In Network Status: Active for Shop... Quick search

Page 1 of 18 1-20 of 357 Results

Quick Filters My Searches

Approved By

Bush, Kara (91)  
Martin, Margot (45)

Supplier Name

Supplier Classes Last Modified Supplier Number Registration Status Registration Type Registration Date Supplier Type Duns Number Diversity Classification

Suppliers (highlighted)  
Manage Suppliers  
Approvals  
Requests  
Performance

Quick search Supplier Management Home Search for a Supplier

Commodity Code

No Commodity Code (355)  
Show More (2)

Contract Party Type

Supplier (346)  
Customer (7)  
Show More

Country of Origin

United States (337)  
No Country (12)  
Canada (2)  
Antarctica (1)

4.8 Test line 7

4.9 Test supplier line 22

4.9 Test supplier line 26

5.21 control

500 Replication (500) ACH

A-TOWN AV

Academic Recruiting Services \*

7/23/2025 12:29:18 PM 1003736726 Approved Solicited 5/12/2023 Non-Catalog

8/26/2025 3:40:24 PM 1004752210 Approved Solicited 4/8/2025 Non-Catalog

8/28/2025 2:19:33 PM 1004752232 Approved Solicited 4/8/2025 Non-Catalog

8/29/2025 9:26:18 AM 1004752222 Approved Solicited 4/8/2025 Non-Catalog

8/12/2025 4:13:34 PM 1004752492 Approved Solicited 4/9/2025 Non-Catalog

7/31/2025 1:49:59 PM 1004753370 Approved Solicited 4/9/2025 Non-Catalog

8/29/2025 9:13:37 AM 1004819801 Approved Solicited 5/21/2025 Non-Catalog

4/3/2025 10:07:57 AM 1004041955 In Progress Solicited 3/28/2024 Non-Catalog

8/12/2025 12:40:20 PM 1003873861 Approved Solicited 9/14/2023 Non-Catalog

8/26/2025 9:24:06 AM 1004408208 Approved Solicited 8/27/2024 Non-Catalog

❖ Supplier Fly Out- Search for all suppliers in CSUBuy

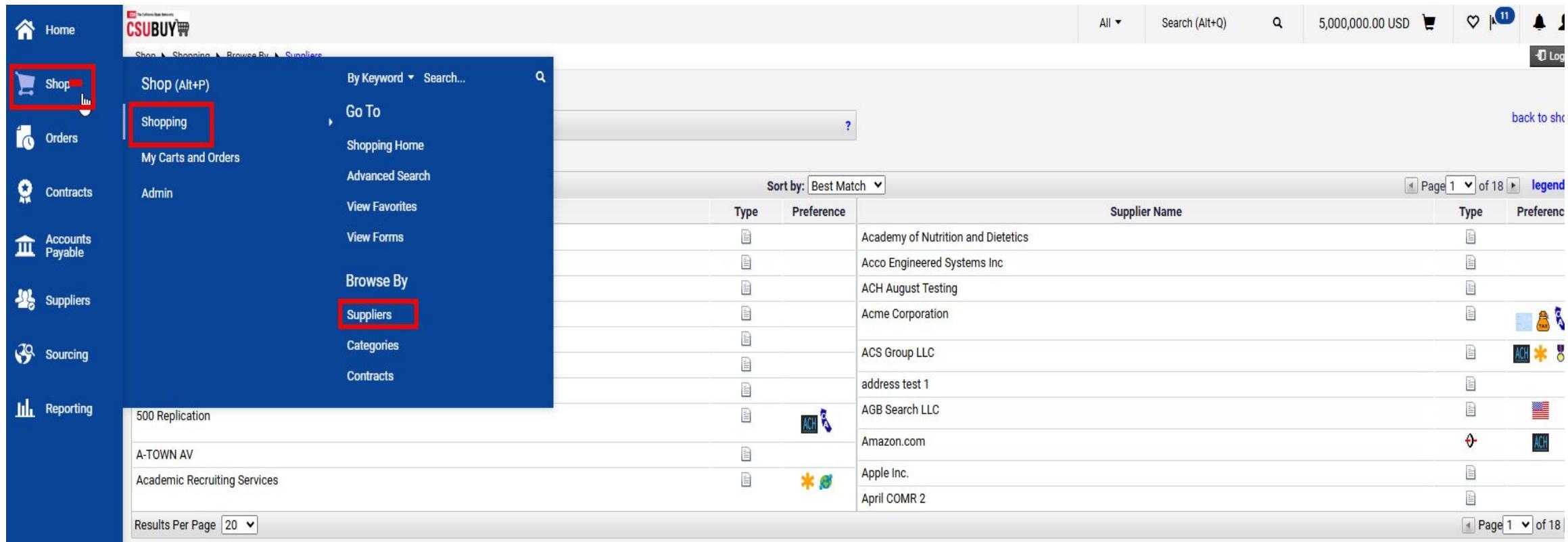
# Q&A

# Module 3- Supplier

## Search for Suppliers

- Two Options for Searching
  - Shop Flyout
  - Supplier Flyout (All Campuses in P2P)
    - Supplier Extension Request Form
    - Request New Supplier Form

# Search for CSUEB Suppliers Shop Flyout



The screenshot shows the CSUEB Suppliers Shop Flyout interface. The left sidebar has the following navigation links:

- Home
- Shop** (highlighted with a red box)
- Orders
- Contracts
- Accounts Payable
- Suppliers
- Sourcing
- Reporting

The main content area shows a search interface with a 'Shop' button, a search bar, and a list of suppliers. The 'Suppliers' link in the sidebar is also highlighted with a red box.

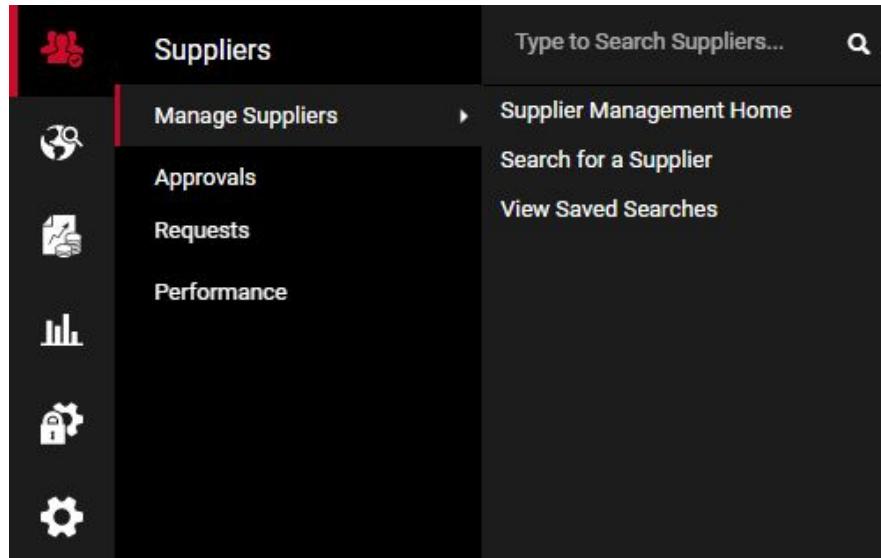
Type	Preference	Supplier Name	Type	Preference
		Academy of Nutrition and Dietetics		
		Acco Engineered Systems Inc		
		ACH August Testing		
		Acme Corporation		
		ACS Group LLC		
		address test 1		
		AGB Search LLC		
		Amazon.com		
		Apple Inc.		
		April COMR 2		

- Check here to see if your supplier is available, if yes, you can select them and move your requisition forward

# Search for Suppliers Flyout- All Campuses

The screenshot shows the CSUBUY supplier search interface. The main page displays a list of suppliers with columns for Company Name, Supplier Classes, Last Modified, Supplier Number, Registration Status, Registration Type, Registration Date, Supplier Type, Duns Number, and Diversity Classification. A flyout menu is open over the 'Suppliers' section, showing options: 'Manage Suppliers' (highlighted with a red box), 'Supplier Management Home', and 'Search for a Supplier' (also highlighted with a red box). The left sidebar contains navigation links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers (highlighted with a blue box), Sourcing, and Reporting. The 'Suppliers' section in the sidebar also has links for 'Manage Suppliers', 'Approvals', 'Requests', and 'Performance'. The 'Manage Suppliers' section in the flyout has sub-links for 'Commodity Code', 'Contract Party Type', and 'Country of Origin'. The 'Commodity Code' section shows 'No Commodity Code' with 355 items and a 'Show More' link. The 'Contract Party Type' section shows 'Supplier' with 346 items and a 'Show More' link. The 'Country of Origin' section shows 'United States' with 337 items and a 'Show More' link. A 'Menu Search' link is also present in the sidebar.

# Suppliers Menu



Manage Suppliers

❖ Search for Suppliers

Approvals

❖ Review Previously Requested Suppliers  
❖ Review and Approve Suppliers

Requests

❖ Search for Previous Requests

Performance

❖ My Evaluations

# Supplier Search

The screenshot shows the 'Search Suppliers' page in the CSUBUY system. The interface includes a sidebar with various filters and a main search results table.

**Callouts:**

- Approved By (1)
- Relationship: In Network (2)
- Status: Active (3)
- Quick search (4)
- Add Filter (5)
- Save As (6)
- Configuration Columns (7)
- Registration Status (8)

**Search Results Table Headers:**

...	Company Name	Supplier Classes	Last Modified	Supplier Number	Registration Status	Registration Type	Registration Date	Supplier Type	Duns Number	Diversity Classification
-----	--------------	------------------	---------------	-----------------	---------------------	-------------------	-------------------	---------------	-------------	--------------------------

**Sample Data:**

...	Supplier Not Known		9/20/2024 7:31:06 AM	1003736726	Approved	Solicited	5/12/2023	Non-Catalog		None (None)
...	500 Replication (500)	ACH	8/6/2024 3:57:42 PM	1004041955	In Progress	Solicited	3/28/2024	Non-Catalog		None (None)
...	A-TOWN AV		9/12/2024 11:52:21 AM	1003873861	Approved	Solicited	9/14/2023	Non-Catalog		None (None)
...	Academic Recruiting Services	AR	9/20/2024 7:26:15 AM	1004408208	Approved	Solicited	8/27/2024	Non-Catalog		None (None)

1. Who Approved the Supplier
2. Should always be In Network
3. Should always be Enabled for Procurement
4. Quick Search Field
5. Add Filter
6. Save As
7. Configuration Columns
8. Registration Status

# Supplier Search

Suppliers ▶ Manage Suppliers ▶ Search for a Supplier

## Search Suppliers

Quick Filters My Searches

Approved By

Martin, Margot	2220
Taylor, Melissa	2004
Albrecht Peterson, Melanie	1790
Bush, Kara	1692
Kuhnert, Kathryn	1451

Relationship: In Network

Status: Active for Shop...

Quick search

Clear All Filters

Page 1 of

All

Active for Shopping

Not Active for Shopping

Company Name

Apply Cancel

Supplier Number	Registration Status	Type
1004350900	Approved	Se
1008873040	Approved	Se
1008951027	Approved	Se

\*Supplier Not Known

10,000 Degrees

101Netlink

ACH

11/18/2024 3:34:31 PM

10/7/2024 3:11:21 PM

11/12/2024 9:02:52 AM

Business Unit

No Business Unit

4735

# Supplier Status

Registration Status #8:	Definition
None	Loaded, not invited
Invited	Registration invitation sent to supplier
In Progress	Supplier has started registration
Registration Complete	Supplier has completed a registration
Approved	Supplier profile has been approved through registration workflow
Status #3:	Definition
Active for Shopping	 Active for Shopping/Requisition
Not Active for Shopping	 Inactive for Shopping/Requisition
CSUBUY Network Relationship #2	
In Network 	Search results should be limited to "In Network"

# \*Is Supplier Available to CSUEB

CSUBUY

Suppliers ▶ Manage Suppliers ▶ Search for a Supplier

All ▾ Search (Alt+Q)  5,000,000.00 USD  11    Logout

## Search Suppliers

Quick Filters My Searches

Relationship: In Network ▾ Status: Active for Shop... ▾ Quick search   Add Filter ▾ Clear All Filters  ?

Page 1 of 18 1-20 of 359 Results   Actions ▾

Company Name	Supplier Classes	Last Modified	Supplier Number	Registration Status	Registration Type	Registration Date	Supplier Type	Duns Number	Diversity Classification
*Supplier Not Known		7/23/2025 12:29:18 PM	1003736726	Approved	Solicited	5/12/2023	Non-Catalog		None (None)
4.8 Control Supplier		8/26/2025 3:40:24 PM	1004752210	Approved	Solicited	4/8/2025	Non-Catalog		None (None)
4.8 Test line 4		8/28/2025 2:19:33 PM	1004752232	Approved	Solicited	4/8/2025	Non-Catalog		None (None)
4.8 Test line 7		8/29/2025 9:26:18 AM	1004752222	Approved	Solicited	4/8/2025	Non-Catalog		None (None)
4.9 Test supplier line 22		8/12/2025 4:13:34 PM	1004752492	Approved	Solicited	4/9/2025	Non-Catalog		None (None)
4.9 Test supplier line 26		7/31/2025 1:49:59 PM	1004753370	Approved	Solicited	4/9/2025	Non-Catalog		None (None)
5.21 control		8/29/2025 9:13:37 AM	1004819801	Approved	Solicited	5/21/2025	Non-Catalog		None (None)
500 Replication (500)	ACH	4/3/2025 10:07:57 AM	1004041955	In Progress	Solicited	3/28/2024	Non-Catalog		None (None)

Approved By

- Bush, Kara (92)
- Martin, Margot (45)
- McClurg, Tu (29)
- Jones, Chris (11)
- Requester, Rocky (9)

Business Unit

- No Business Unit (359)

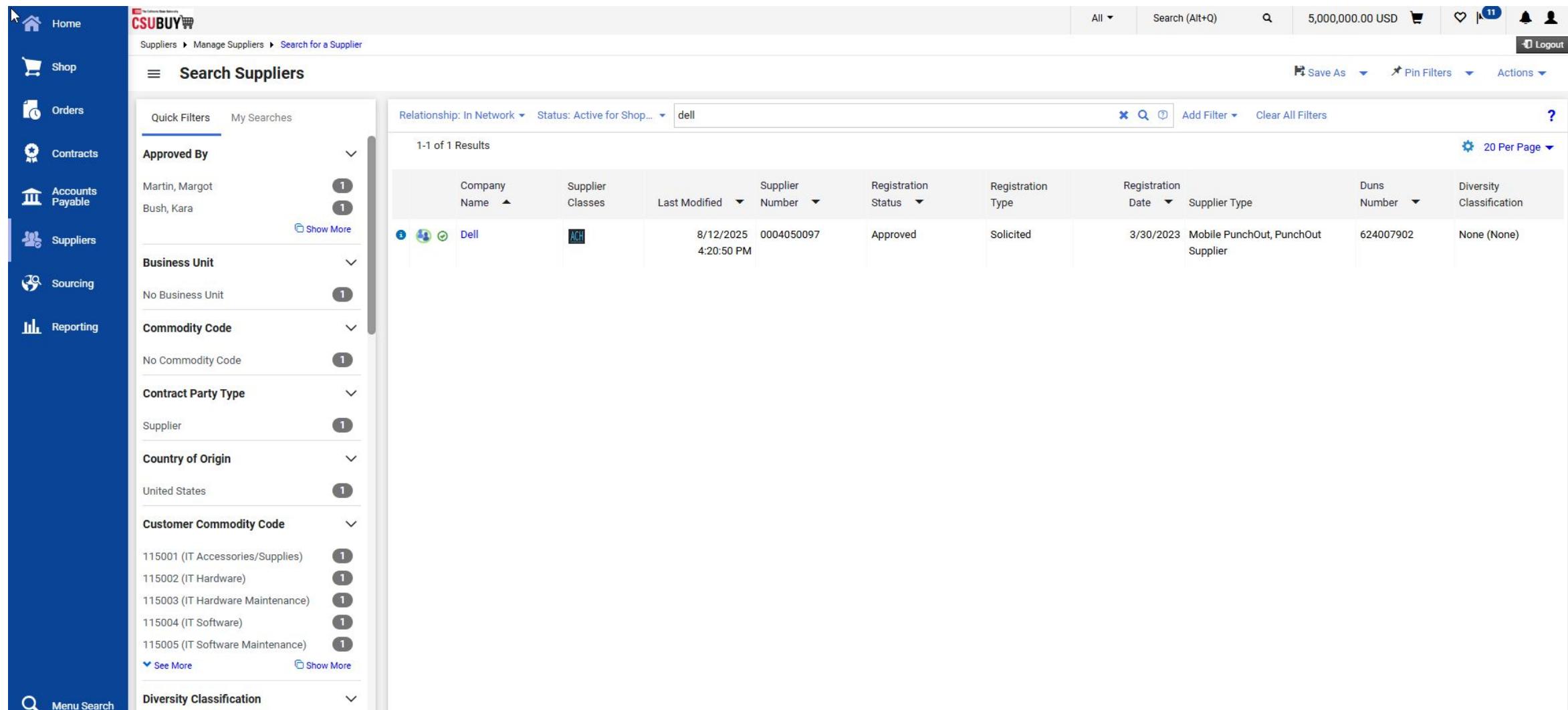
Commodity Code

- No Commodity Code (357, 2)

Contract Party Type

- Supplier (348)
- Customer (7)

# Is Supplier Available to CSUEB



The screenshot shows the CSUBUY supplier search interface. The left sidebar contains navigation links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, and Reporting. The main search interface has a search bar with the query "dell", a filter section with "Relationship: In Network" and "Status: Active for Shop...", and a table showing 1-1 of 1 results. The table columns are: Company Name, Supplier Classes, Last Modified, Supplier Number, Registration Status, Registration Type, Registration Date, Supplier Type, Duns Number, and Diversity Classification. The result for Dell is listed: Company Name: Dell, Supplier Classes: ACH, Last Modified: 8/12/2025 4:20:50 PM, Supplier Number: 0004050097, Registration Status: Approved, Registration Type: Solicited, Registration Date: 3/30/2023, Supplier Type: Mobile PunchOut, PunchOut Supplier, Duns Number: 624007902, and Diversity Classification: None (None).

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Menu Search

CSUBUY

Suppliers > Manage Suppliers > Search for a Supplier

Search Suppliers

Quick Filters My Searches

Approved By

- Martin, Margot (1)
- Bush, Kara (1)

Show More

Business Unit

- No Business Unit (1)

Commodity Code

- No Commodity Code (1)

Contract Party Type

- Supplier (1)

Country of Origin

- United States (1)

Customer Commodity Code

- 115001 (IT Accessories/Supplies) (1)
- 115002 (IT Hardware) (1)
- 115003 (IT Hardware Maintenance) (1)
- 115004 (IT Software) (1)
- 115005 (IT Software Maintenance) (1)

See More Show More

Diversity Classification

All ▾

Search (Alt+Q)

5,000,000.00 USD

11

Logout

Save As ▾

Pin Filters ▾

Actions ▾

Relationship: In Network ▾

Status: Active for Shop...

dell

1-1 of 1 Results

Company Name	Supplier Classes	Last Modified	Supplier Number	Registration Status	Registration Type	Registration Date	Supplier Type	Duns Number	Diversity Classification
Dell	ACH	8/12/2025 4:20:50 PM	0004050097	Approved	Solicited	3/30/2023	Mobile PunchOut, PunchOut Supplier	624007902	None (None)

# Supplier 360 - What BU's that Supplier is Extended to

The screenshot shows the CSUBUY supplier profile page for Dell. The left sidebar includes links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, and Reporting. The main content area displays the supplier details for Dell, including its legal name (Dell), DBA (Dell), and aliases. The 'Supplier Details' section shows that Dell is an active supplier for shopping and has 19 values selected for its active business unit(s). The 'Products and Services' section lists NAICS codes (334111 - Electronic Computer Manufacturing) and commodity codes (115001 through 140001). The 'Contract Alerts' section allows filtering by contract type and alert type. The 'Internal Notes' section indicates there are no internal notes. The 'RSS Feed' section states that no RSS feed is configured.

Home CSUBUY

Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile - Dell

All ▾ Search (Alt+Q)  5,000,000.00 USD   11  Logout

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Supplier 360

Supplier Details

Dell

In Network

Active for Shopping\*

Enabled for Contracts

PunchOut Supplier

Legal Name: Dell

DBA: Dell

Aliases

Supplier No.: 0004050097

3rd Party Ref No.: -

Active Business Unit(s): 19 Values Selected

Date of Last Order: 7/8/2025

Diversity

Registration Status: Approved

Business Description: There is no business description available for this supplier.

Contract Alerts

Filter Contract Alerts

Contracts: All Contracts

Alert Type: All Alerts

Contract Type: Type to filter...

Occurs Within: 0-30 Days

Products and Services

NAICS Codes

Primary: 334111 - Electronic Computer Manufacturing

Secondary: No Secondary NAICS Codes Selected

Commodity Codes

115001 (IT Accessories/Supplies)

115002 (IT Hardware)

115003 (IT Hardware Maintenance)

115004 (IT Software)

115005 (IT Software Maintenance)

140001 (Computer Lease/Rental)

Keywords

Laptop Laptops Notebook Notebooks Printer Printers Dell Computer

Internal Notes

No Internal Notes to display.

RSS Feed

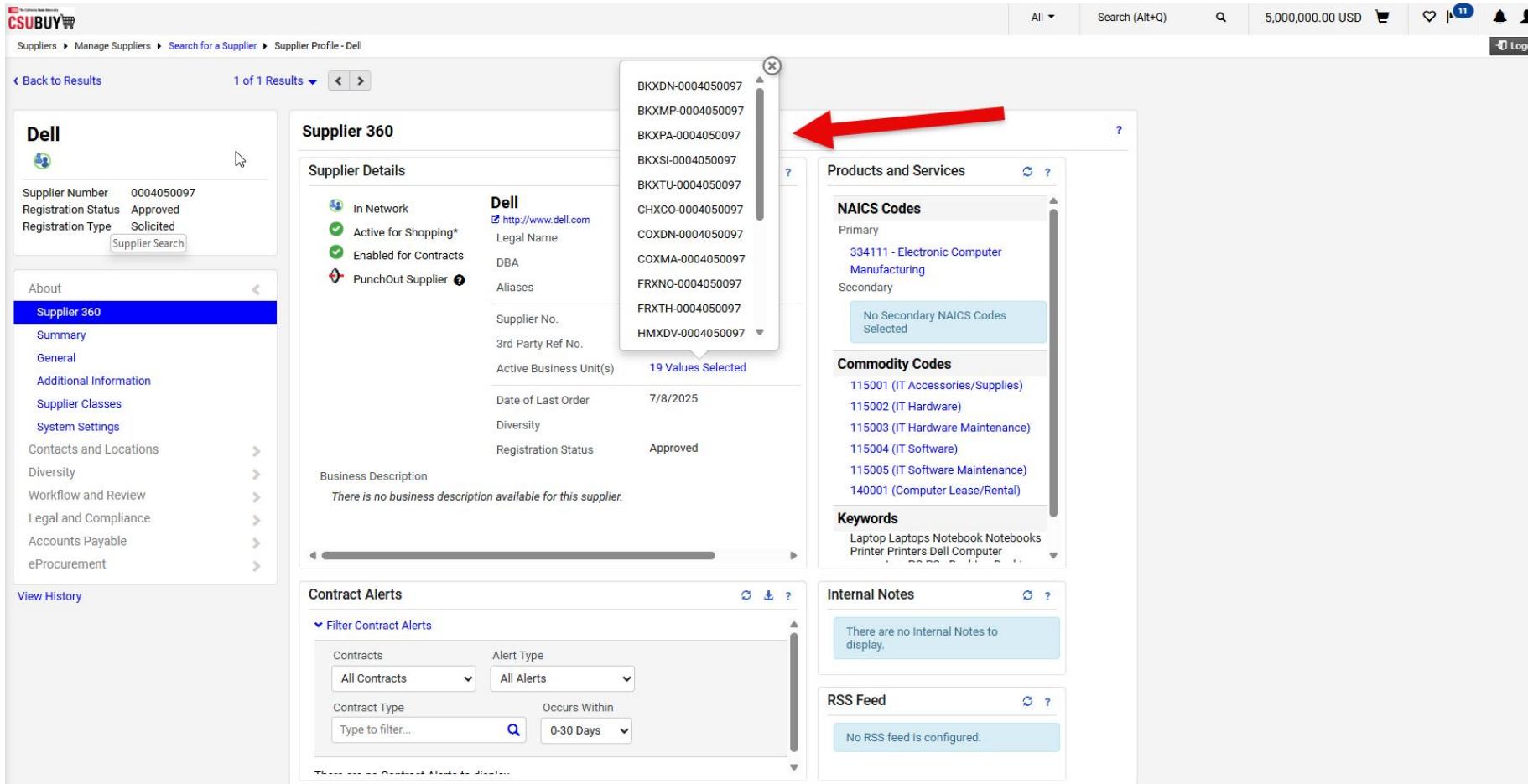
No RSS feed is configured.

View History

Menu Search

MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.

# Supplier 360 - What BU's that Supplier is Extended to

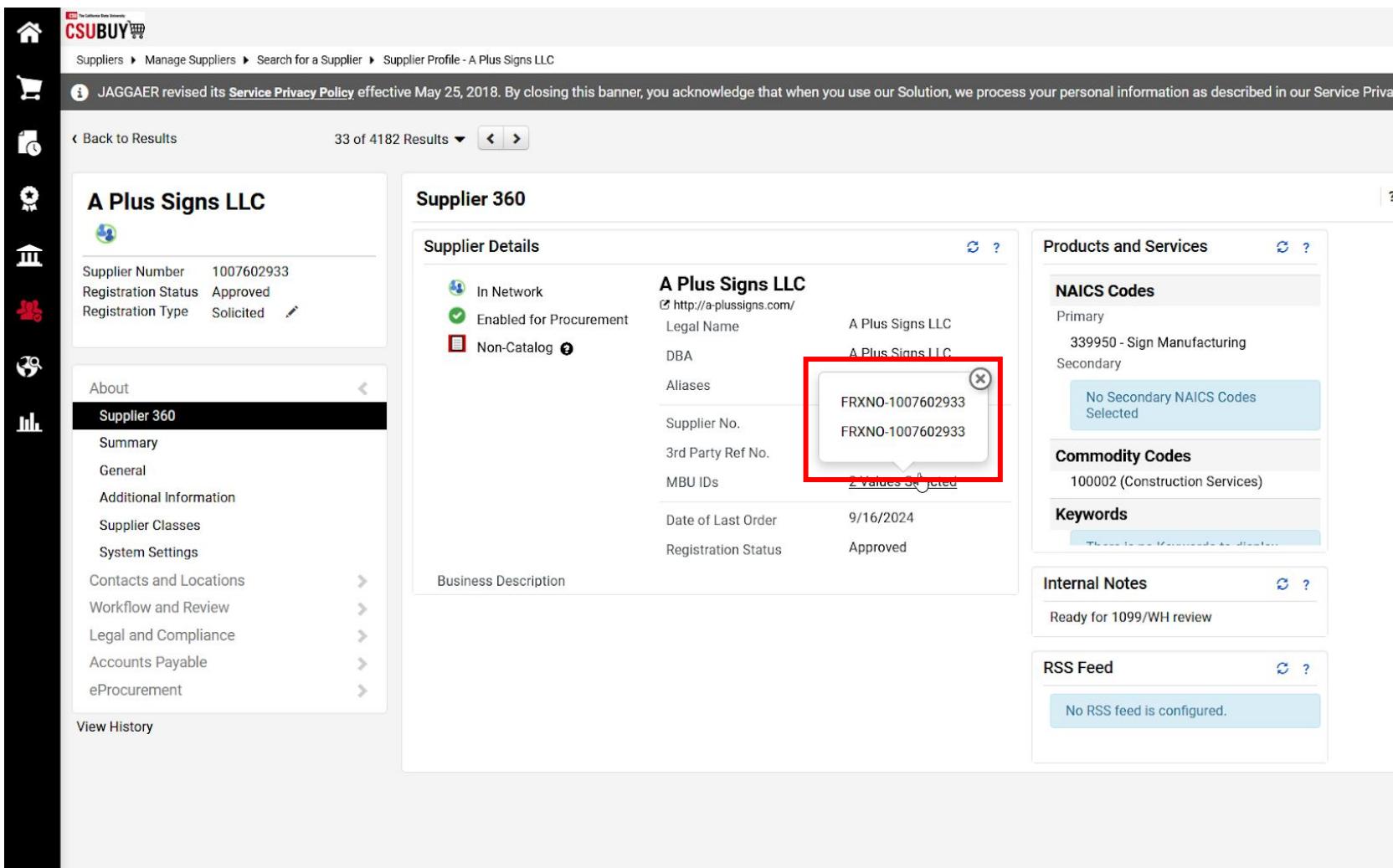


The screenshot shows the Supplier 360 profile for Dell. The 'Products and Services' section is highlighted with a red arrow. It lists several BU IDs: BKKDN-0004050097, BKXMP-0004050097, BKXPA-0004050097, BKXSI-0004050097, BKXTU-0004050097, CHXCO-0004050097, COXDN-0004050097, COXMA-0004050097, FRXNO-0004050097, FRXTH-0004050097, and HMXDV-0004050097. The 'Supplier Details' section shows Dell's legal name, DBA, and aliases. The 'Contract Alerts' section includes filters for contracts and alert types. The 'Internal Notes' and 'RSS Feed' sections are also visible.

CSUEB has 3 Business Units:  
EBXMP (main campus)  
EBXDN (Foundation)  
EBXDF (Ed Foundation)  
\*\*The campus community will use EBXMP.

*MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.*

# Supplier 360 - What BU's that Supplier is Extended to



The screenshot shows the Supplier 360 profile for 'A Plus Signs LLC'. The left sidebar shows navigation links like 'Supplier 360', 'Summary', 'General', 'Additional Information', 'Supplier Classes', 'System Settings', 'Contacts and Locations', 'Workflow and Review', 'Legal and Compliance', 'Accounts Payable', 'eProcurement', and 'View History'. The main content area is titled 'Supplier 360' and contains sections for 'Supplier Details' and 'Products and Services'. In the 'Supplier Details' section, there is a table with columns for 'Supplier Number', 'Registration Status', 'Registration Type', 'Legal Name', 'DBA', 'Aliases', 'Supplier No.', '3rd Party Ref No.', 'MBU IDs', 'Date of Last Order', and 'Registration Status'. The 'MBU IDs' row is highlighted with a red box, showing values 'FRXNO-1007602933' and 'FRXNO-1007602933'. The 'Products and Services' section includes 'NAICS Codes' (Primary: 339950 - Sign Manufacturing, Secondary: No Secondary NAICS Codes Selected), 'Commodity Codes' (100002 (Construction Services)), 'Keywords' (Text input field), 'Internal Notes' (Ready for 1099/WH review), and 'RSS Feed' (No RSS feed is configured).

If EBXMP is not listed but this Supplier should be Extended to CSUEB for use, a Supplier Extension Request should be submitted

*MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.*

# Supplier 360 – Supplier Registration Invitation

The image shows a screenshot of the CSUBUY (California State University) Supplier 360 system. The page is titled "Supplier Profile - 24-7 Software Inc". The left sidebar contains icons for Home, Shopping Cart, Search, and other system functions. The main content area shows the supplier's profile with a summary of general information and registration details.

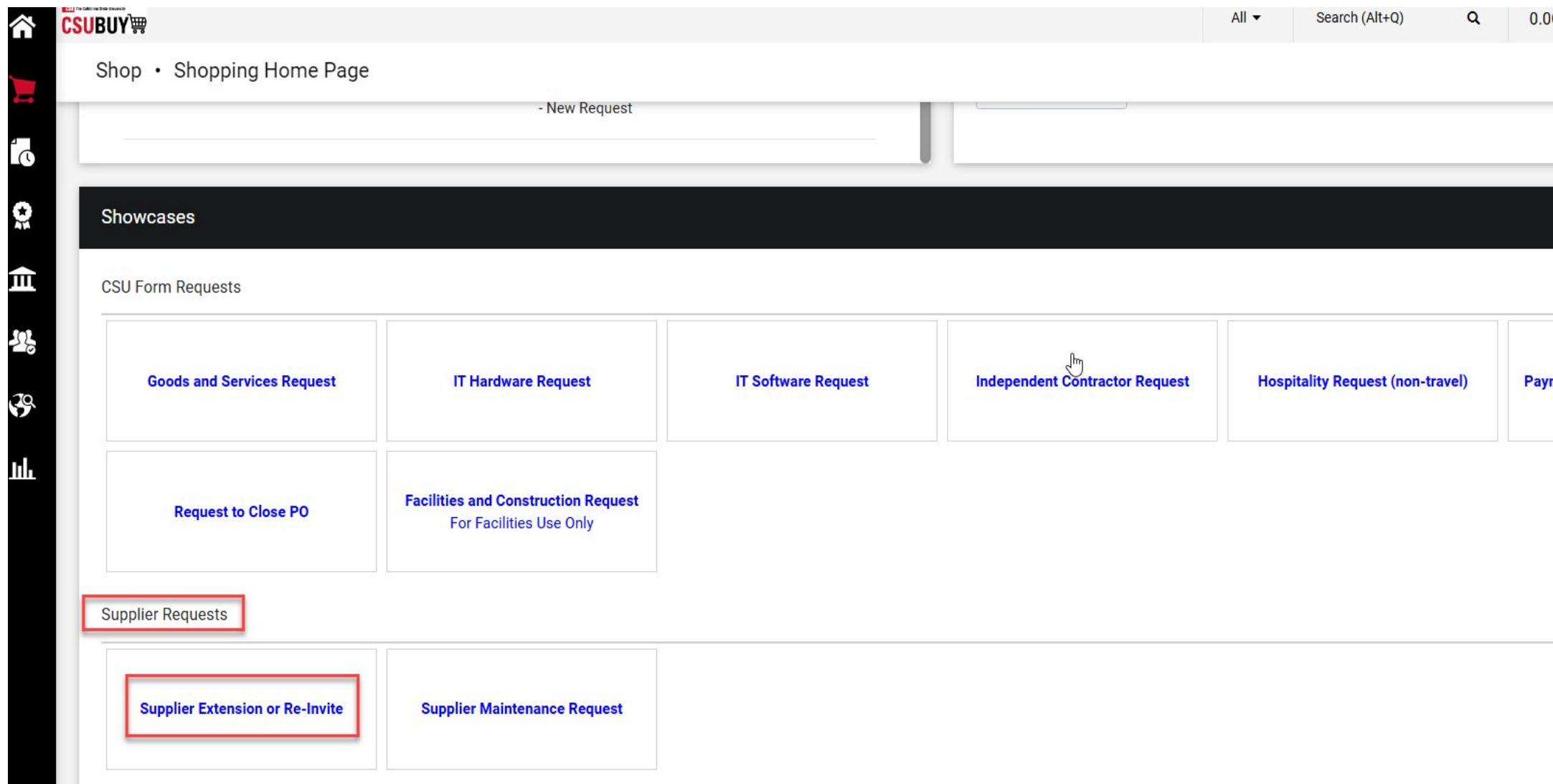
**General Supplier Information:**

Supplier Name	24-7 Software Inc
JAGGAER Indirect Supplier ID	1007466414
Contract Party Types	Supplier
Supplier Number	1007466414
Business Unit Vendor Id(s)	2 Values Assigned.
Active for Shopping	✓
Supplier Classes	ACH
Web Site URL	<a href="http://www.247software.com">http://www.247software.com</a>
Order Acknowledgment	✗
Advanced Ship Notice	✗
e-Invoicing (CXML Invoicing)	✗
Portal Invoicing	✓

**Supplier Registration Information:**

Date Registered	7/11/2023 11:47 PM
Invitation Sent to	pbaid@247software.com on 7/6/2023 6:13 AM
Invitation Sent by	Bryan Grushcow on 7/6/2023 6:13 AM
Last Updated	11/5/2024 4:10 PM
Profile Last Updated by Supplier	4/26/2024 1:06 AM
Registration Method	Solicited
Registration Status	Approved
Registration Type	Solicited

# Supplier Extension or Re-Invite Request



The screenshot shows the CSUBUY Shopping Home Page. The left sidebar contains icons for Home, Shopping Cart, and other navigation. The main header includes the CSUBUY logo, a search bar, and a cart icon showing 0.0. The top navigation bar has a 'New Request' button. Below it, a 'Showcases' section is visible. The 'CSU Form Requests' section contains several buttons: 'Goods and Services Request', 'IT Hardware Request', 'IT Software Request', 'Independent Contractor Request' (with a cursor icon over it), 'Hospitality Request (non-travel)', and 'Payroll Request'. The 'Supplier Requests' section contains 'Supplier Extension or Re-Invite' (highlighted with a red border) and 'Supplier Maintenance Request'. The bottom right corner shows a 'Logout' button.

Shop • Shopping Home Page

- New Request

Showcases

CSU Form Requests

Goods and Services Request

IT Hardware Request

IT Software Request

Independent Contractor Request

Hospitality Request (non-travel)

Payroll Request

Request to Close PO

Facilities and Construction Request  
For Facilities Use Only

Supplier Requests

Supplier Extension or Re-Invite

Supplier Maintenance Request

Logout

# Supplier Extension or Re-Invite Request

CSUBUY The California State University

Shop ▶ Shopping ▶ View Forms

◀ Back to Shopping Home

Supplier Extension or Re-I...

Form Number 15398993      Purpose Generic Request      Status Incomplete

★ Response Is Required

Questions - General

Request Actions ▾ | History | ?

Request Type

What are you requesting? \*

Resend an invitation to an existing CSUBUY supplier

Extend an existing CSUBUY supplier to new campus

Previous Save Progress Next

Instructions

Questions

Review and Submit

Discussion

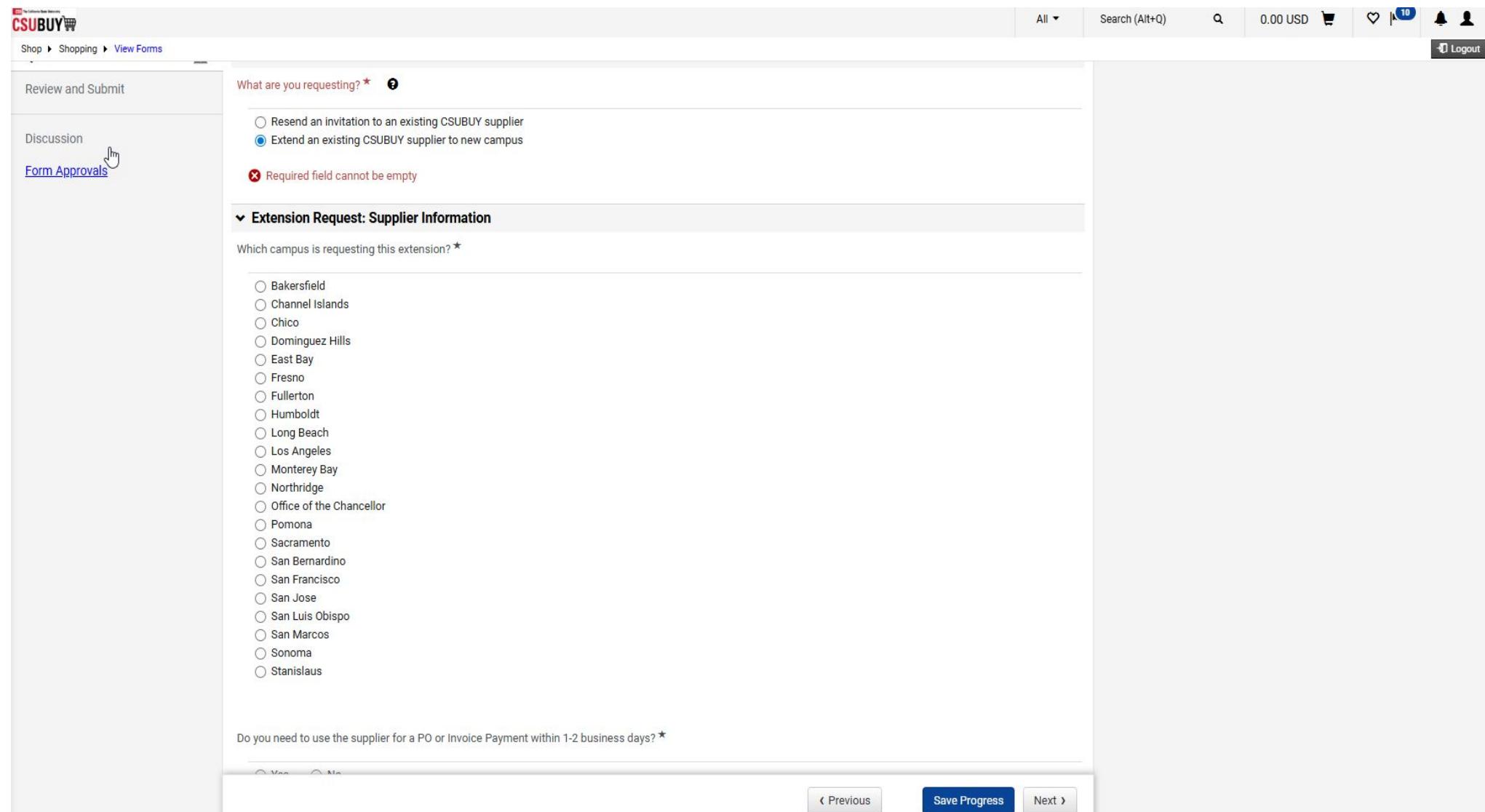
Form Approvals

# Supplier Extension Request

Complete all Questions and  
Submit into Workflow

Helpful Hint:  
Only the \* are Required

If extending please extend  
to all 3 Business Units:  
EBXMP  
EBXDN  
EBXDF



The screenshot shows a web-based form for a 'Supplier Extension Request' on the CSUBUY platform. The form is divided into sections: 'Review and Submit', 'Discussion', and 'Form Approvals'. The 'Review and Submit' section contains a required field 'What are you requesting?' with two options: 'Resend an invitation to an existing CSUBUY supplier' (radio button) and 'Extend an existing CSUBUY supplier to new campus' (radio button, selected). A red error message 'Required field cannot be empty' is displayed below the first option. The 'Discussion' section is collapsed. The 'Form Approvals' section is expanded, showing a list of 34 campuses for selection. The 'Save Progress' button is visible at the bottom.

What are you requesting? \*

Resend an invitation to an existing CSUBUY supplier  
 Extend an existing CSUBUY supplier to new campus

Required field cannot be empty

Extension Request: Supplier Information

Which campus is requesting this extension? \*

Bakersfield  
 Channel Islands  
 Chico  
 Dominguez Hills  
 East Bay  
 Fresno  
 Fullerton  
 Humboldt  
 Long Beach  
 Los Angeles  
 Monterey Bay  
 Northridge  
 Office of the Chancellor  
 Pomona  
 Sacramento  
 San Bernardino  
 San Francisco  
 San Jose  
 San Luis Obispo  
 San Marcos  
 Sonoma  
 Stanislaus

Do you need to use the supplier for a PO or Invoice Payment within 1-2 business days? \*

Save Progress

# Supplier Re-Invite Request

The California State University  
**CSBUY**

All ▾ Search (Alt+Q) 

Shop ▶ Shopping ▶ [View Forms](#)

Form Number **15398993** ★ Response Is Required  
Purpose **Generic Request**  
Status **Incomplete**

Instructions

**Questions** 

Review and Submit

Discussion

Form Approvals

**Request Type**  
What are you requesting? ★   
 Resend an invitation to an existing CSBUY supplier  
 Extend an existing CSBUY supplier to new campus

**Resend Invitation: Supplier Information** 

Suppliers Legal Company Name ★

CSBUY Supplier Number ★

Invitation Email (Please see help text for guidance) ★ 

[◀ Previous](#) [Save Progress](#) [Next ▶](#)

# If Supplier Does Not Exist

The California State University CSBUY

Suppliers ▶ Manage Suppliers ▶ Search for a Supplier

JAGGAER revised its [Service Privacy Policy](#) effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

## Search Suppliers

Relationship: In Network ▾ Status: Enabled for Pro... ▾ Morris Distributing

[Save As](#) [Pin Filters](#) [Actions](#)

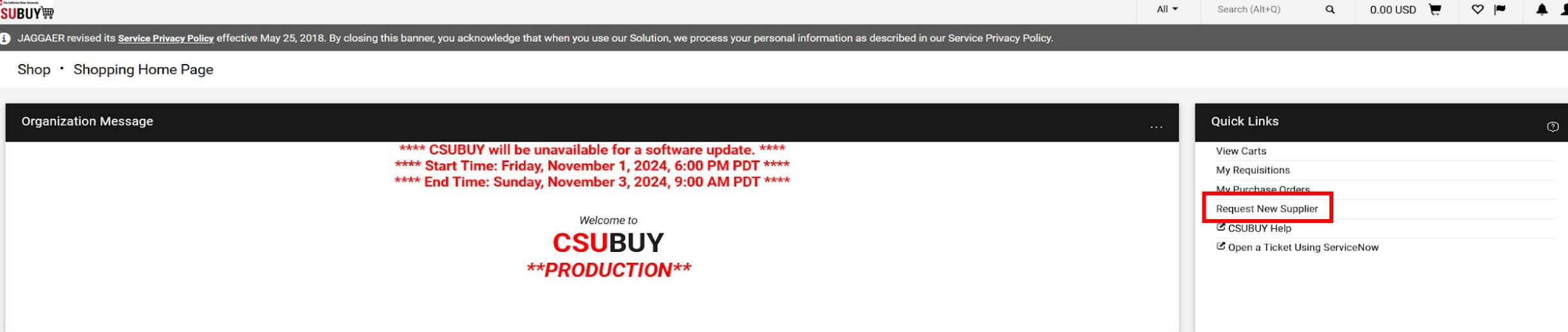
No results were found to match your search

Try modifying your search criteria or removing filters

Request a supplier



# Request New Supplier



The screenshot shows the CSUBUY Shopping Home Page. At the top, there is a banner from JAGGAER about a Service Privacy Policy revision. Below the banner, the page title is "Shop • Shopping Home Page". On the left, there is a sidebar with various icons. The main content area features a "Organization Message" box with a red notice about a software update from November 1 to November 3, 2024. Below this is the CSUBUY logo with the text "Welcome to CSUBUY \*\*PRODUCTION\*\*". To the right, there is a "Quick Links" box with several options, and the "Request New Supplier" link is highlighted with a red box. The bottom section of the page is titled "Shop" and includes tabs for "Simple" and "Advanced", a search bar, and links for "Favorites", "Suppliers", "Categories", and "Contracts".

Organization Message

\*\*\*\* CSUBUY will be unavailable for a software update. \*\*\*\*  
\*\*\*\* Start Time: Friday, November 1, 2024, 6:00 PM PDT \*\*\*\*  
\*\*\*\* End Time: Sunday, November 3, 2024, 9:00 AM PDT \*\*\*\*

Welcome to  
**CSUBUY**  
**\*\*PRODUCTION\*\***

Quick Links

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

Shop

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Go to: Favorites | Browse: Suppliers | Categories | Contracts

Approvals

No results found

Orders Search

All Orders Document Numbers, Supplier, Product Information

SHORTCUTS

My Requisitions

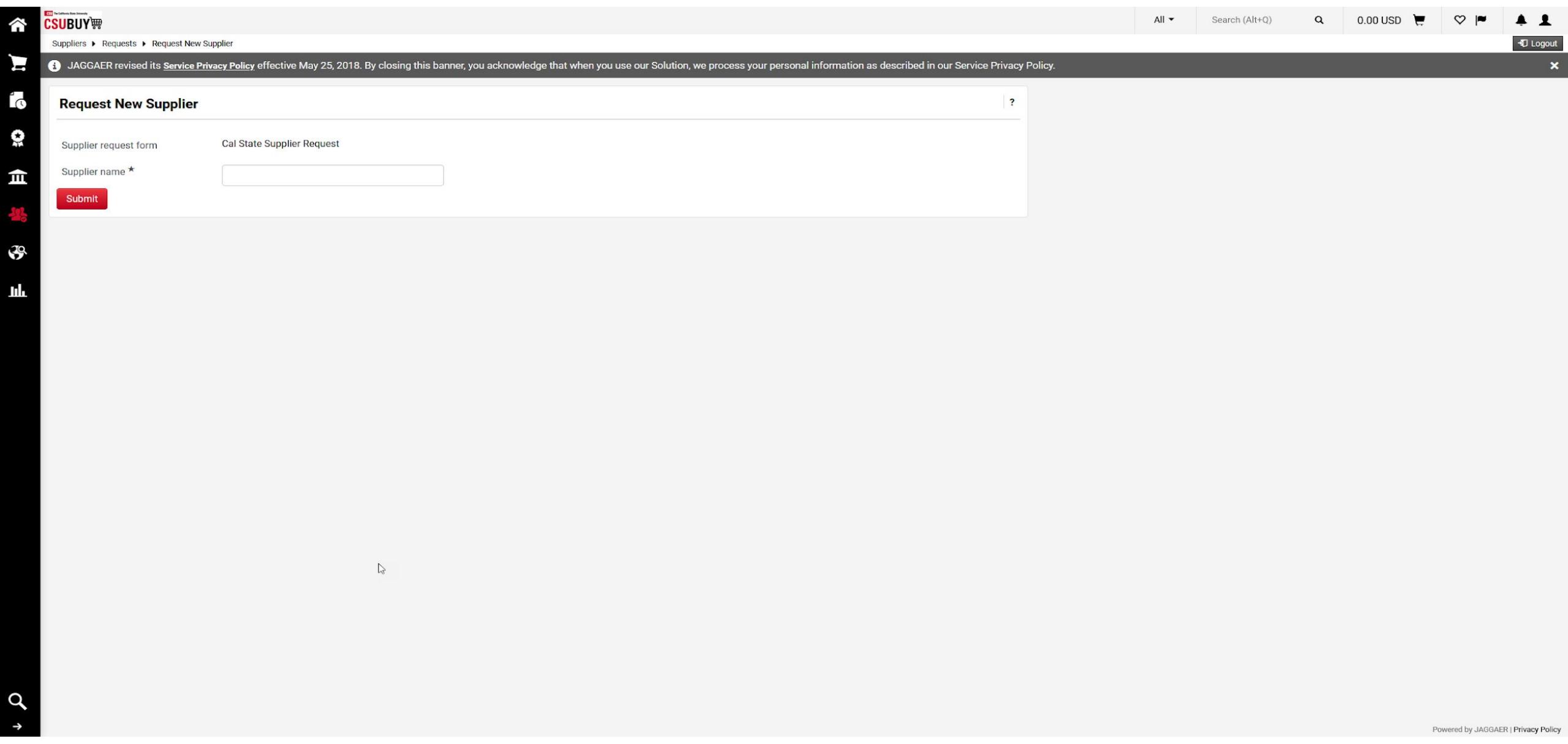
My Purchase Orders

My Vouchers

My Approvals

Powered by JAGGAER | [Privacy Policy](#)

# Request New Supplier



The screenshot shows a web application interface for requesting a new supplier. At the top, there is a navigation bar with icons for Home, Requests, and Logout. The main title is 'Request New Supplier'. Below the title, there is a breadcrumb navigation: Suppliers > Requests > Request New Supplier. A banner at the top states: 'JAGGAER revised its [Service Privacy Policy](#) effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.' The main form area has a title 'Request New Supplier' and two tabs: 'Supplier request form' (selected) and 'Cal State Supplier Request'. A 'Supplier name \*' input field is present, and a 'Submit' button is at the bottom. The left sidebar contains icons for Home, Requests, Logout, and other application features.

The page title is 'Request New Supplier'.

The page URL is 'Suppliers > Requests > Request New Supplier'.

A banner message: 'JAGGAER revised its [Service Privacy Policy](#) effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.'

The main form title is 'Request New Supplier'.

The tabs are 'Supplier request form' (selected) and 'Cal State Supplier Request'.

The input field is 'Supplier name \*'.

The button is 'Submit'.

The sidebar icons include Home, Requests, Logout, and other application features.

# Request New Supplier

The California State University  
**CSUBUY** 

All ▾ Search (Alt+Q)  

Suppliers ▶ Requests ▶ My Supplier Requests

[My Supplier Requests](#)

**JCJ Consultant dba BSS**

Template	CSU New Supplier Request
Request Status	Incomplete

**Instructions**  [Print Request](#) | [History](#) | [?](#)

Use this form to:

- Request the setup of a new supplier for purchases and/or payments.

**DO NOT use this form to register CSU Employees or Students.**

**Additional Information for New Supplier Setup**

Requests to setup a new supplier will require the supplier to complete a registration and provide important information such as legal structure, company financials and tax. **Please provide an email for a supplier contact who can accurately complete these details.** This component is key to expedite the registration process. Please contact your supplier's representative to ensure that they can provide this information. If they can't, they should be able to provide you with the email address of someone who can.

The submitted request will be evaluated to identify whether the supplier should be invited to register into the CSU Supplier Master. The evaluation may result in:

- A recommended alternative CSU Supplier who can provide the goods and/or services requested
- Adding the requested supplier into the CSU Supplier Master
- Rejection of the requested supplier into the CSU Supplier Master if the supplier already exists, if the information provided is not sufficient to evaluate the supplier, or if the validation of the supplier information deems the supplier should not be added.

For questions contact your Campus Supplier Administrator.

**Next >**

# Request New Supplier

CSUBUY

Suppliers > Requests > My Supplier Requests

All ▾ Search (Alt+Q) 0.00 USD Logout

**Questions**

Supplier Name **\***  
JCJ Consultant

Doing Business As (DBA)

Is this request for a full supplier profile to issue payment or for a Contract-only profile? **\*** ⓘ  
 Full Supplier Profile with payment  Contract-Only Profile with no payment

**Full Supplier Profile Information**

Which campus is requesting this new supplier? **\***  
 Bakersfield  Channel Islands  Chico  Dominguez Hills  East Bay  Fresno  Fullerton  Humboldt  Long Beach  
 Los Angeles  Monterey Bay  Northridge  Office of the Chancellor  Pomona  Sacramento  San Bernardino  
 San Francisco  San Jose  San Luis Obispo  San Marcos  Sonoma  Stanislaus

Do you need to use the supplier for a PO or Invoice Payment within 1-2 business days? **\***  
 Yes  No

Select the type of products and/or services the supplier will provide **\***  
 Supplier will provide a service, labor, or installation on campus/in California.  Supplier will provide goods.  Supplier will create custom goods (branded/promotional, commissioned art, floral arrangements, etc.)

Provide additional details of the products and/or services the supplier will provide you. **\***

★ Required

◀ Previous Save Progress Next ▶

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# Request New Supplier

## Requests

Yes  No

### ▼ Additional New Supplier Request Details

#### Important Instructions:

For the Supplier to complete their registration, they must input important information such as legal structure, company financials and tax. **Please provide an email address of the supplier contact who will receive the invitation email, and who can accurately complete the registration.** This contact may not be your regular supplier representative. Invitation emails cannot be forwarded to a different email address. An incorrect email address will cause delays in processing the new supplier request.

Registration Contact First Name



Registration Contact Last Name

Email Address ★

Will transactions with this Supplier need to distinguish between different divisions or departments (operating under the same TIN)?

No  Yes

Please provide name(s) and address(es) for additional Supplier divisions or departments that need to be established in this Supplier's profile

★ Required

◀ Previous

Save Progress

Next ▶

# Q&A

# Module 4- Punchout Catalogs

Showcases

CSU Form Requests >

GENERAL >

INFORMATION TECHNOLOGY >

LABORATORY & SCIENTIFIC, MEDICAL & ATHLETIC >

FACILITIES MANAGEMENT >

BLACK BOX SAFETY

FASTENAL

GRAINGER

irg

LOWE'S PRO

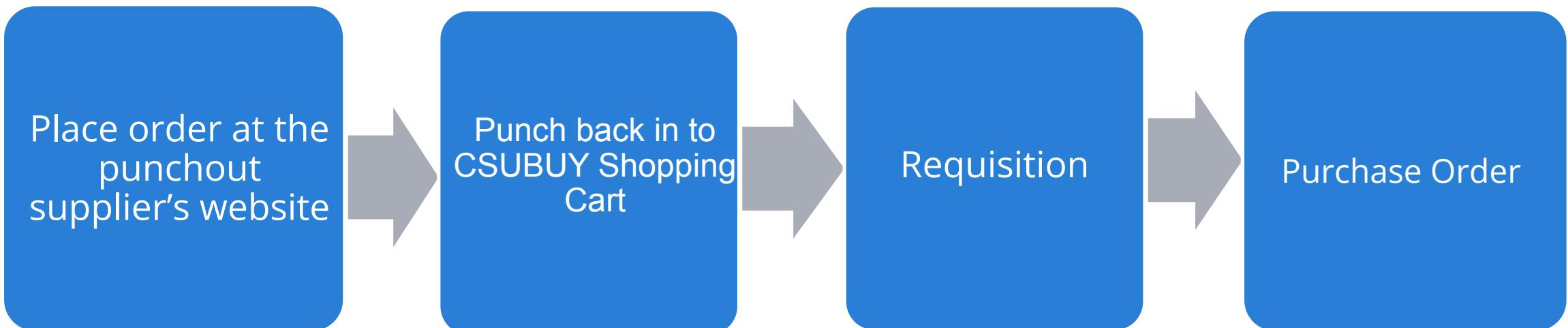
STAPLES

WAXIE

Test Hosted Catalogs >

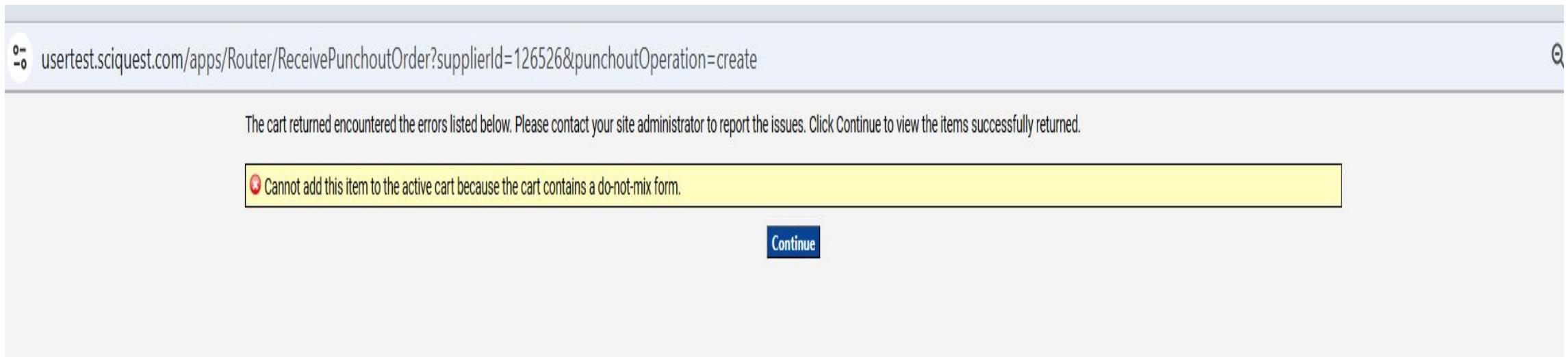
- ❖ Do not have both P2P and Marketplace browsers open at the same time.
- ❖ Do not use punchout catalog (Dell, CDWG...) for IT equipment. See Module 5 IT Hardware Form Request.

# Punchout Catalog Purchase



# Punchout Catalogs

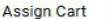
- ❖ Make sure you are in the correct Business Unit--EBXMP (Persona)
- ❖ Make sure your cart is empty before you start shopping otherwise you will have to re do all the shopping again!



The screenshot shows a web browser window with the following details:

- Address Bar:** usertest.sciquest.com/apps/Router/ReceivePunchoutOrder?supplierId=126526&punchoutOperation=create
- Page Content:** The page displays an error message: "The cart returned encountered the errors listed below. Please contact your site administrator to report the issues. Click Continue to view the items successfully returned." Below this message is a yellow box containing the error: "Cannot add this item to the active cart because the cart contains a do-not-mix form." A "Continue" button is located at the bottom of this box.

Home  Purchase Orders  80.32 USD    

Shop  Proceed To Checkout

Orders  Summary

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Shopping Cart • Shopping Cart

Simple Advanced 

Search for products, suppliers, forms, part number, etc. 

Cart Name: 2024-11-05 85000000595 04

Deliver To Location:   

Details

For: Joy Ming-Lan Sun

Total (81.26 USD)

1 Item

Staples • 1 Item • 74.89 USD  

SUPPLIER DETAILS: Sonoma State University P2P (SOXMP) : 7656 Eastland Road, Cleveland, Ohio 44024 United States

Contract: no value

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 11/6/2024 3:53:09 PM

- Perk Ultra Soft Tissue, 2-Ply, 95 Sheets/Box, 6 Boxes/Pack, 6 Packs/Carton (PK57779CT)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1 Perk Ultra Soft Tissue, 2-Ply, 95 Sheets/Box, 6 Boxes/Pack, 6 Packs/Carton (PK57779CT)	24416521	CT	74.89	Qty: 1 CT	74.89	<input type="checkbox"/>

Home  [CSUBUY](#) 

Shop 

Orders 

Contracts 

Accounts Payable 

Suppliers 

Sourcing 

Reporting 

Menu Search 

Requisition • 4156546 

Purchase Orders  Search (Alt+Q)  80.32 USD    

Assign Cart  Submit Request 

Summary Taxes/S&H PO Preview Comments Attachments History

Cart Name	2024-11-05 85000000595 04	Attn: Joy Ming-Lan Sun Receiving-Sonoma State University 1801 East Cotati Ave Rohnert Park, CA 94928 United States	PO Type	no value
Business Unit	Sonoma State University P2P (SOXMP)		Amount-Only / Blanket PO	
			Multi-Year PO	
			Terms/FOB	
			Override Needed	
			Reference ID	no value
			Do Not Distribute	
			 Values vary by line.	
<b>Deliver To</b>				
Deliver To Location	00011001B_SOXMP Stevenson 1001B			
Ship Via	Best Carrier-Best Way			
Due Date	no value			
<b>Bill To</b>				
Accounts Payable, Sonoma State University Sonoma State University 1801 East Cotati Ave Rohnert Park, CA 94928 United States				

**Chartfield**  

 Values vary by line.	Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
  no value	  no value	  no value		 no value	 no value	 no value	 no value	

**Other Participant Information**  

Prepared by Joy Ming-Lan Sun

**Internal Notes and Attachments**  

Internal Note no value

**External Notes and Attachments**  

Note to all no value

**Summary** 

**Draft**

 **Correct these issues.**  
You are unable to proceed until addressed.

**Required: Business Unit**  
**Required: Fund**  
Please add a DeptID to the Chartfield(s) for this requisition.

 **Be aware of these issues.**  
You may review and proceed.

**Empty: DeptID**

**Total (81.26 USD)** 

**What's next for my order?** 

Next Step Wait for Validation 1

Approver Approver (DO NOT DELETE), Workflow

**Workflow** 

**Draft**  
Active  
Joy Ming-Lan Sun

Start - Parallel Steps

Requisition Validation 1  
Future

[Home](#)
[Shop](#)
[Orders](#)
[Contracts](#)
[Accounts Payable](#)
[Suppliers](#)
[Sourcing](#)
[Reporting](#)

CSUBUY

## Requisition • 4156546

[Purchase Orders](#)
[Search \(Alt+Q\)](#)
81.26 USD
63
23

[Assign Cart](#)
[Submit Request](#)

[Summary](#) [Taxes/S&H](#) [PO Preview](#) [Comments](#) [Attachments](#) [History](#)

**General Information**

**Transaction Details**

Cart Name: 2024-11-05 85000000595 04

Business Unit: Sonoma State University P2P (SOXMP)



**Address Information**

**Ship To**

Attn: Joy Ming-Lan Sun  
Receiving-Sonoma State University  
1801 East Cotati Ave  
Rohnert Park, CA 94928  
United States

**Deliver To**

Deliver To: 00011001B\_SOCMP  
Location: Stevenson 1001B

Ship Via: Best Carrier-Best Way

Due Date: no value

**PO Information**

Accounting Date: no value

PO Type: no value

Amount-Only / Blanket PO: X

Multi-Year PO: X

Terms/FOB: X  
Override Needed

Reference ID: no value

Do Not Distribute: X

! Values vary by line.

**Summary**

**Draft**

**Total (81.26 USD)**

**What's next for my order?**

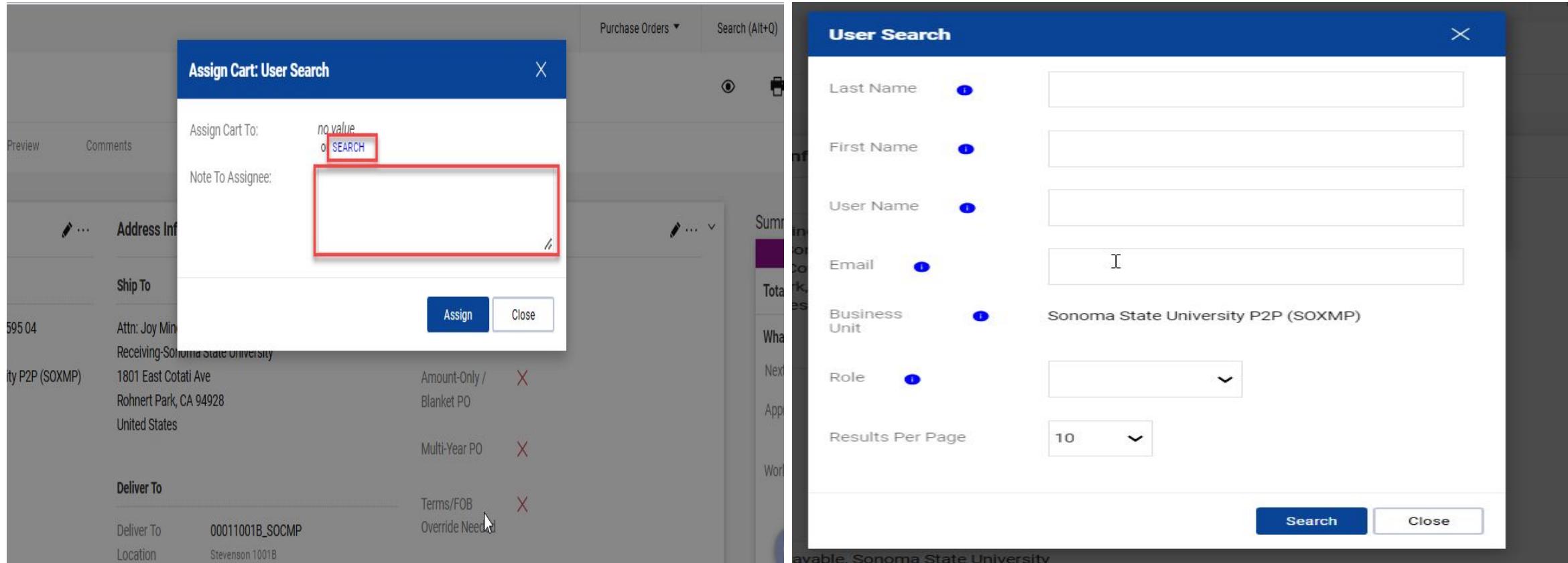
Next Step: Wait for Validation 1

Approver: Approver (DO NOT DELETE), Workflow

**Workflow**

```

graph TD
    Start((Start)) --> Draft((Draft))
    Draft --> Parallel((Start - Parallel Steps))
    Parallel --> Validation1((Requisition Validation 1))
    Parallel --> Validation2((Wait for Validation 1))
    Validation1 --> Future1((Future))
    Validation2 --> Future2((Future))
    
```



- ❖ Assign cart is only applicable to “shopper” role, please work with your department to identify the correct “requestor” in your department.

# “Prepared By” Versus “Prepared For”

## Prepared By

The user that submitted the cart into workflow:

- ❖ May have created the cart.
- ❖ May have been assigned the cart by another user.
- ❖ Must have the Requester role

## Prepared For

User that created the cart:

- ❖ If a Shopper, must assign cart to a Requester
- ❖ Becomes the PO Owner

- ❖ “Prepared By” and “Prepared For” can be the same user.
- ❖ This is applicable to all requisitions.

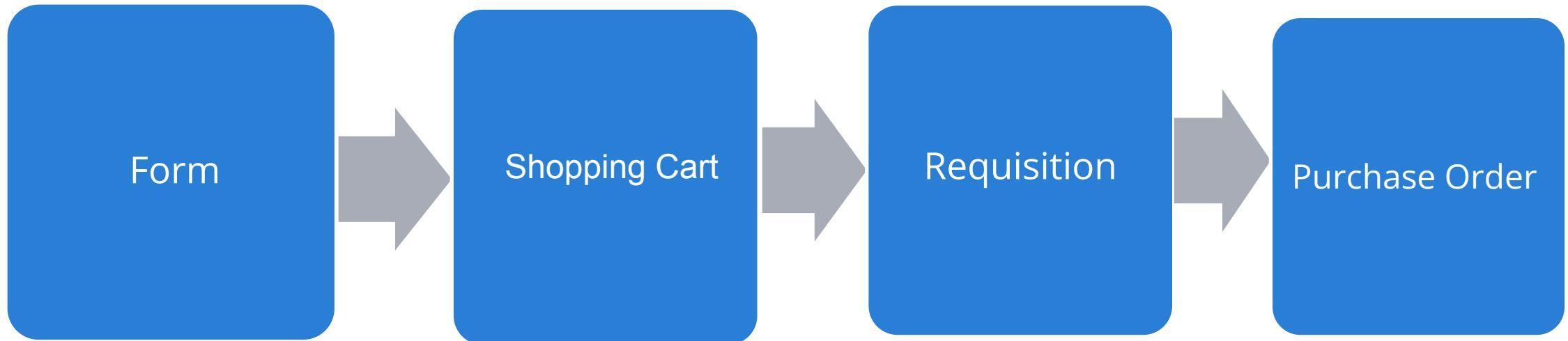
- Shopping cart turn into a “Requisition” and a PO will be issued (Procard will no longer be utilized).
- Since punchouts are managed by the suppliers, each will have a unique look and feel.
- Ensure web browser allows for pop-ups. Punchout supplier's site will appear as a separate browser screen.
- Make sure shopping cart is empty before shopping.
- Receiving is now required on punchout catalogs purchase over \$500.
- Best Practice – keep punchout catalog carts to eight (8) lines/items or less.

# Q&A

# Module 5-Form Requests

- ❖ Goods and Services Request
- ❖ IT Hardware Request-includes Technology Purchase Review (TPR)
- ❖ IT Software Request-includes Technology Purchase Review (TPR)
- ❖ Independent Contract Request- includes the ICR Process
- ❖ Hospitality Form (Non-Travel)- Includes the Hospitality Questions
- ❖ Payment for Unauthorized Purchase

# Requisition Process



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## Shop • Shopping Home Page

Search for products, suppliers, terms, part number, etc.



### Approvals

No results found



### Orders Search

All Orders

Document Numbers, Supplier, Product Information



#### SHORTCUTS

[My Requisitions](#)

[My Purchase Orders](#)

[My Vouchers](#)

[My Approvals](#)

[Advanced Search](#)

### Showcases

CSU Form Requests

[Goods and Services Request](#)

[IT Hardware Request](#)

[IT Software Request](#)

[Independent Contractor Request](#)

[Hospitality Form \(Non-Travel\)](#)

[Payment for Unauthorized Purchase](#)

[Request to Close PO](#)

[Facilities and Construction Request  
For Facilities Use Only](#)

Other CSU Requests



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◀ Back to Shopping Home

## Goods and Services Request

Form Number 14630062

Purpose Procurement Request

Status Incomplete

### Instructions

#### Instructions

Request Actions ▾ | History | ?

Use this form to request goods and/or services that are not available via catalog through the search bar. Examples are:

- Goods - Other
- Services - other
- Classroom or Laboratory Supplies
- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

### Suppliers



### Form Fields



Review and Submit

This form should not be used if the request:

- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

**Note: A supplier must be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this request form.**

Next >

❖ Each Request form will have an Instructions Page and a Suppliers Page

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◀ Back to Shopping Home

## Goods and Services Request

Form Number 14630062  
Purpose Procurement Request  
Status Incomplete

### Instructions

- Suppliers
- Form Fields
- Review and Submit

### Instructions

Use this form to request goods and/or services that are not available via catalog through the search bar. Examples are:

- Goods - Other
- Services - other
- Classroom or Laboratory Supplies
- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

This form should not be used if the request:

- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

**Note: A supplier must be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this request form.**

Request Actions ▾ | History | ?

Next ▶

❖ The Instructions Area will list the forms needed to complete the Request, you can click on them interchangeably

❖ Or you can click Next through the forms required to complete the Request

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◀ Back to Shopping Home

## Goods and Services Request

Form Number 14630062  
Purpose Procurement Request  
Status Incomplete

Instructions

### Suppliers

Request Actions ▾ | History | ?

Supplier Please select a fulfillment center below.

#### Search Registered Suppliers

Supplier

Zip Code

 Within 5 Miles

Clear

Search

◀ Previous

Next ▶

Form Fields

Review and Submit

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◀ Back to Shopping Home

## Goods and Services Request

Form Number 14630022  
Purpose Procurement Request  
Status Incomplete

Instructions

Suppliers

Form Fields

Review and Submit

### Form Fields - Form Fields

Request Actions ▾ | History | ?

Q Field Name Is Searchable  
★ Response Is Required

#### General Information

What type of goods or services are you requesting? \*

Is this a Blanket Order? \*

Yes  No

Is the request for a renewal of a previous purchase?

Yes  No

Does the request include performance terms (start & end date)? \*

Yes  No

Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND? \*

No  
 Yes, Sole Source  
 Yes, Sole Brand

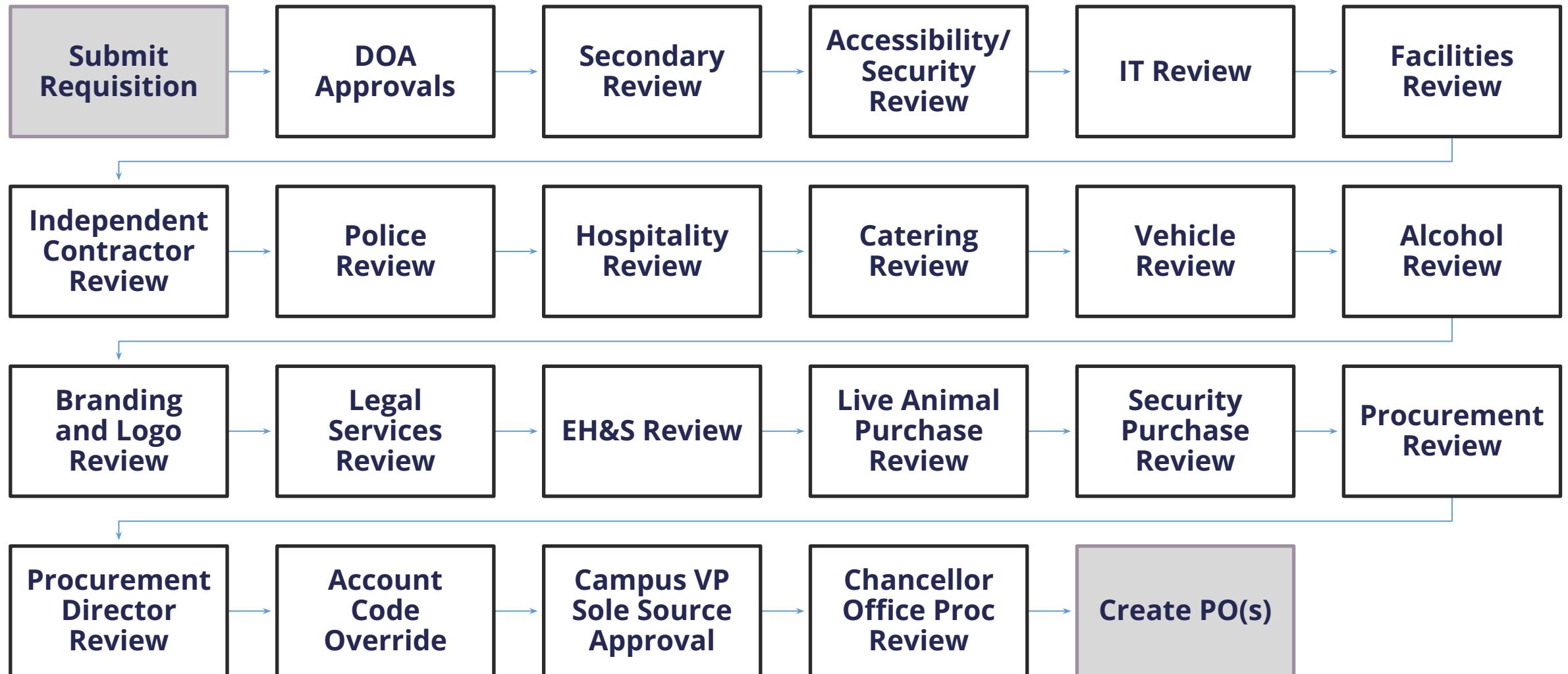
◀ Previous

Save Progress

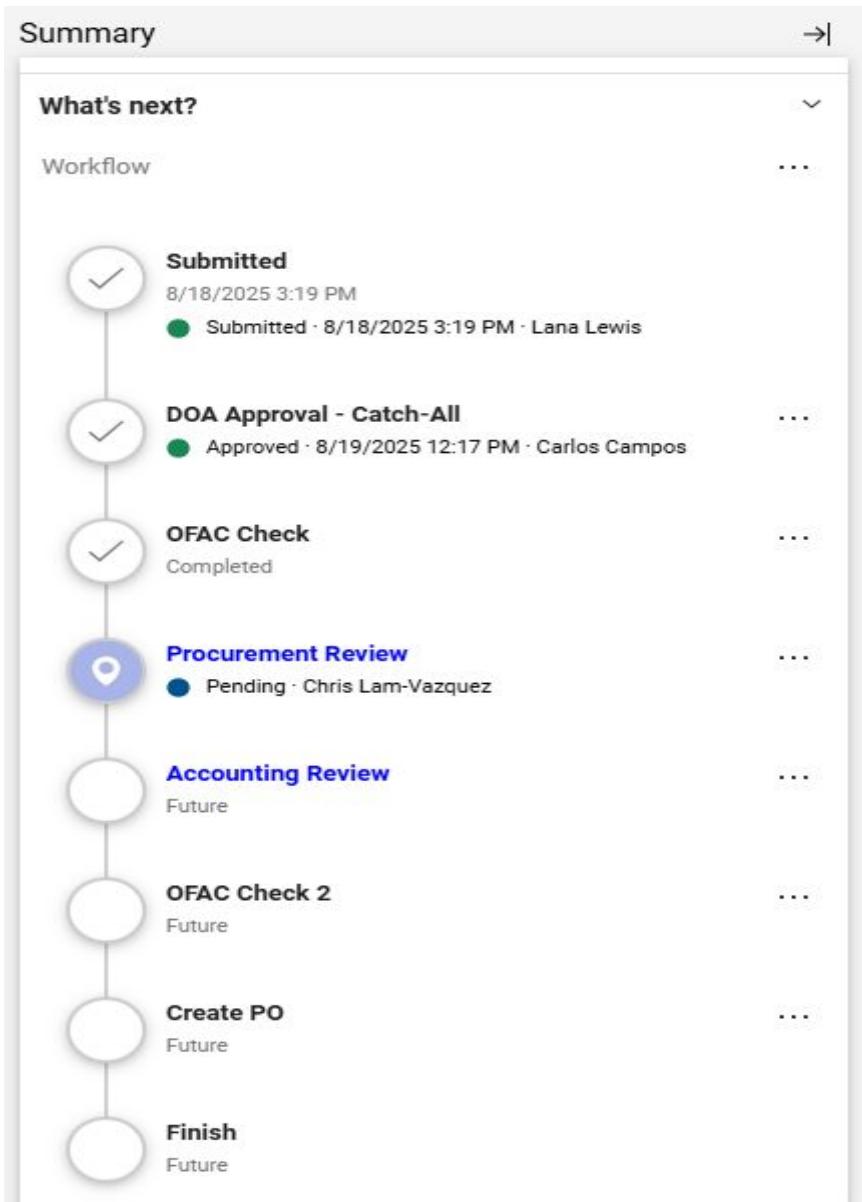
Next ▶

- ❖ Form Fields very depending on the type of Request
- ❖ The questions can be dynamic based on your answers
- ❖ The answer to the Sole Source or Sole Brand Question will always be NO, unless prior approval from Procurement
- ❖ Questions are required to move the form forward
- ❖ Once complete the form can be submitted into workflow
- ❖ Make sure your shopping cart is empty before you start a new requisition

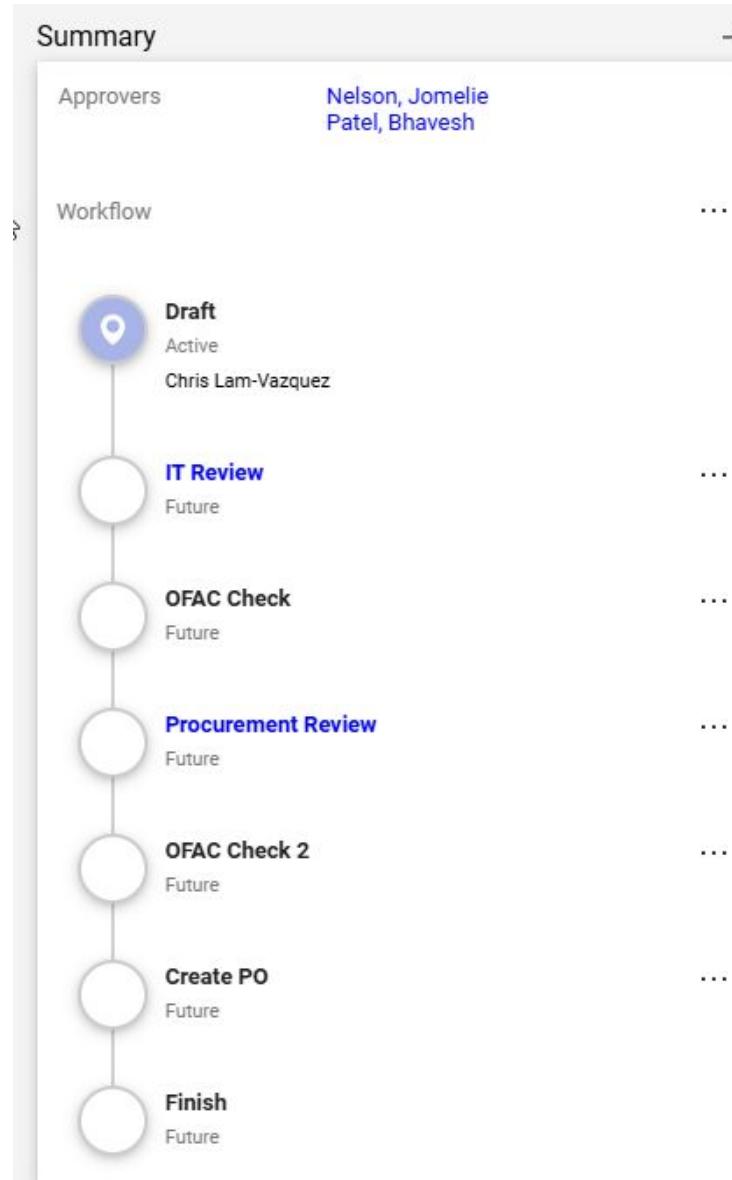
# Workflow Overview



# Workflow Goods/Services



# Workflow IT Hardware



# Workflow IT Software



# IT Hardware/Equipment Purchase Process

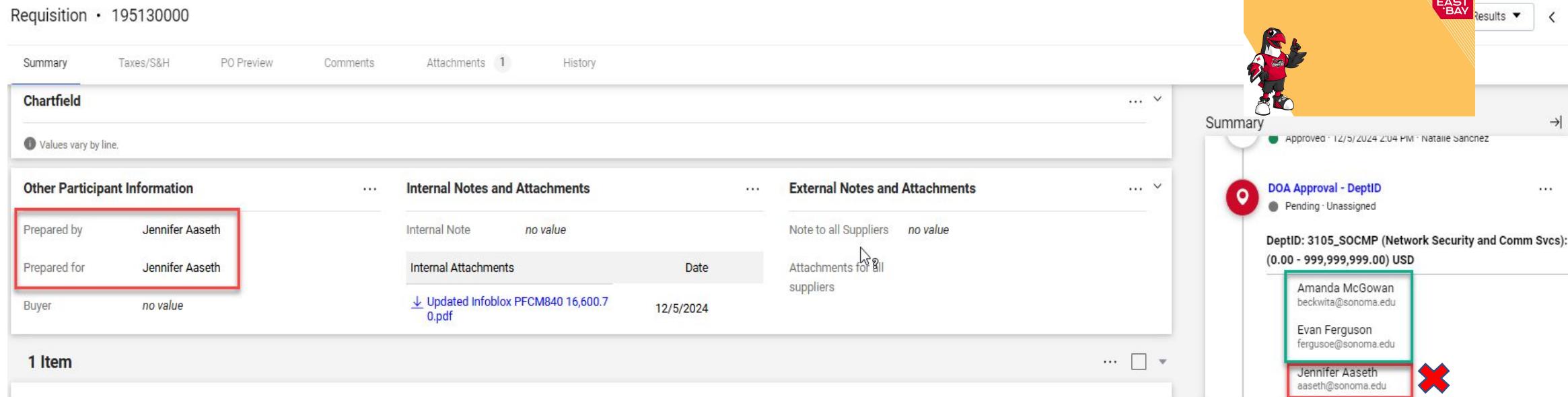
- ❖ Work with IT to obtain a quote.
- ❖ Use IT Hardware Request Form. Do not use punchout catalog.
- ❖ Build the form/cart with information you have, for example -monitor, equipment or laptop/computer description, quantity, special request.....

# Other Workflow Steps

- ❖ Facilities Review
- ❖ Vehicle Review
- ❖ Branding and Logo Review
- ❖ EH&S Review

# Workflow – Segregation of Duties

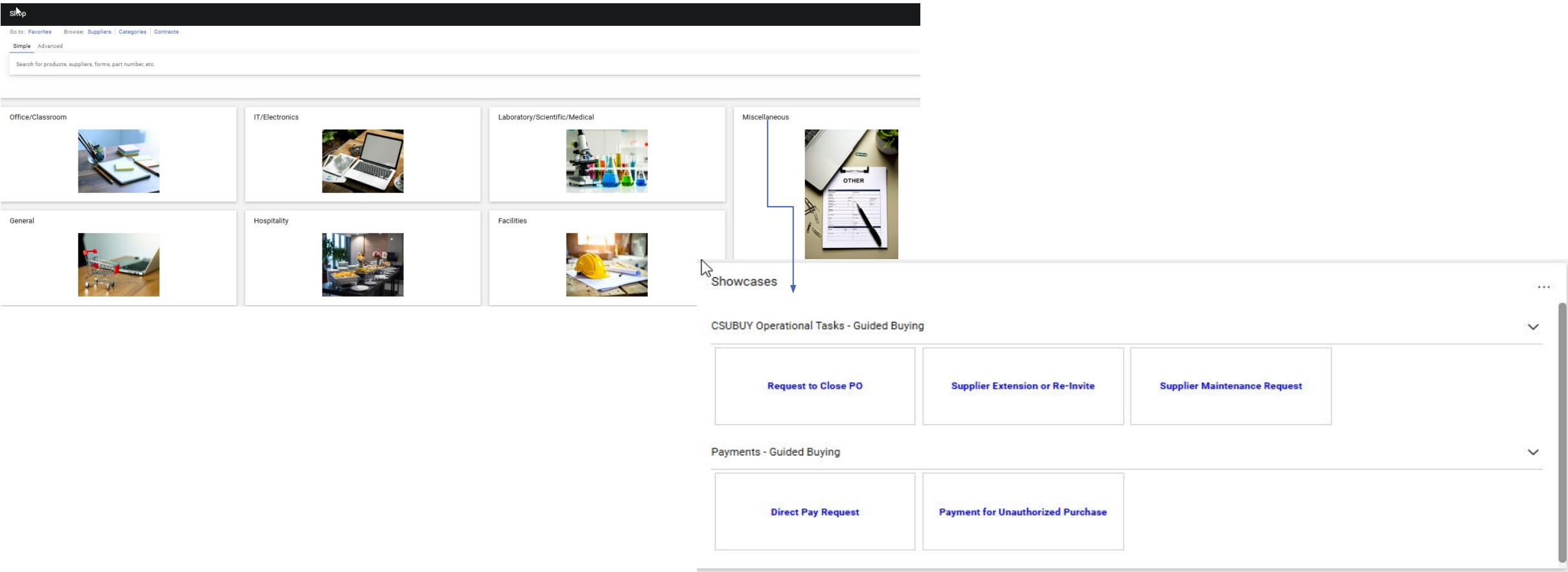
Requestor/Shopper can not approve their own requisition



The image shows two screenshots from a procurement system. The left screenshot is a 'Requisition' detail page for item 195130000. It displays 'Other Participant Information' with 'Prepared by' and 'Prepared for' both listed as 'Jennifer Aaseth', which is highlighted with a red box. The right screenshot shows a 'Workflow' history page for the same requisition. It lists 'DOA Approval - DeptID' with 'DeptID: 3105\_SOCMP (Network Security and Comm Svcs): (0.00 - 999,999,999.00) USD'. Under this, three approvers are listed: 'Amanda McGowan' (approved), 'Evan Ferguson' (pending), and 'Jennifer Aaseth' (pending). The 'Jennifer Aaseth' entry is highlighted with a red box and has a red 'X' icon to its right, indicating she cannot approve her own requisition.

For the purpose of this requisition, Jen Aaseth is the requestor and she is also listed under DOA Approval in the workflow therefore she can not approve this requisition. Amanda or Evan will have to approve this requisition.

# Payment for Unauthorized Purchase



The screenshot shows the CSUBuy platform interface. At the top, there is a navigation bar with links for 'Favorites', 'Suppliers', 'Categories', and 'Contracts'. Below the navigation bar is a search bar with 'Simple' and 'Advanced' search options. The main content area is a grid of categories: 'Office/Classroom' (desk with papers), 'IT/Electronics' (laptop), 'Laboratory/Scientific/Medical' (microscope), 'Miscellaneous' (desk with papers), 'General' (desk with shopping cart), 'Hospitality' (buffet table), and 'Facilities' (construction site). A blue arrow points from the 'Miscellaneous' category to a callout box labeled 'Showcases'. Below the grid, there is a section titled 'CSUBUY Operational Tasks - Guided Buying' containing three buttons: 'Request to Close PO', 'Supplier Extension or Re-Invite', and 'Supplier Maintenance Request'. Another section titled 'Payments - Guided Buying' contains two buttons: 'Direct Pay Request' and 'Payment for Unauthorized Purchase'.

- ❖ Goods and/or services that are not placed on an authorize CSUBuy Form and completed workflow through finalization of Purchase Order, require the Unauthorized Purchase Form to be completed and appropriate documentation must be attached.

[◀ Back to Shopping Home](#)

## Payment for Unauthorized...

Form Number **1034093**Purpose **Procurement Request**Status **Incomplete**

### Instructions

Suppliers Form Fields 

Review and Submit

### Instructions

Request Actions ▾ | History | ?

Use this form to process a payment for a good or service that has already been received without a CSUBUY Purchase Order.

**Note:** Goods and services that are not placed on an authorized CSUBUY Purchase Order, or via the Direct Pay Request, leave the CSU exposed to risk and are not allowed per CSU Policy. In the future, all goods and services should be acquired using an authorized CSUBUY Purchase Order or Direct Pay Request prior to order placement.

This form should not be used if the request:

- Is a payment for a Direct Payment invoice. See the Direct Pay Request Form.
- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Use the Direct Payment form for the following:

- Academic Recruitment Commission/Fee
- Attorney Fee
- Freight / Postage / Shipping
- Legal Settlement
- Local & Federal Government Payment
- Medical Service Payment
- Memberships
- Official/Referee Payment
- Permit / License (non-IT)
- Royalty Payment
- Subscription/Publication (non-IT)
- Utilities

❖ **In order to complete the form, the supplier must have an APPROVED registration status available for shopping.**

[Next ▶](#)

Requisition • 4161425

Summary   Taxes/S&H   PO Preview   Comments   **Attachments**   History

General Information		Address Information		PO Information	
Transaction Details		Ship To		Accounting Date	<i>no value</i>
Cart Name	Testing Unauthorized Purchase Workflow	Attn: Carrie Schmidt Receiving-Sonoma State University 1801 East Cotati Ave Rohnert Park, CA 94928 United States		PO Type	<i>no value</i>
Business Unit	Sonoma State University P2P (SOXMP)			Amount-Only / Blanket	<input checked="" type="checkbox"/>
				PO	<input checked="" type="checkbox"/>
				Multi-Year PO	<input checked="" type="checkbox"/>
				Reference ID	<i>no value</i>
				Do Not Distribute	<input checked="" type="checkbox"/>
		Deliver To Location	00000000_SOCMP LAND SSU	Tax Code	<i>no value</i>
		Ship Via	Best Carrier-Best Way		
		Due Date	<i>no value</i>		
Bill To					
Accounts Payable, Sonoma State University Sonoma State University 1801 East Cotati Ave Rohnert Park, CA 94928 United States					

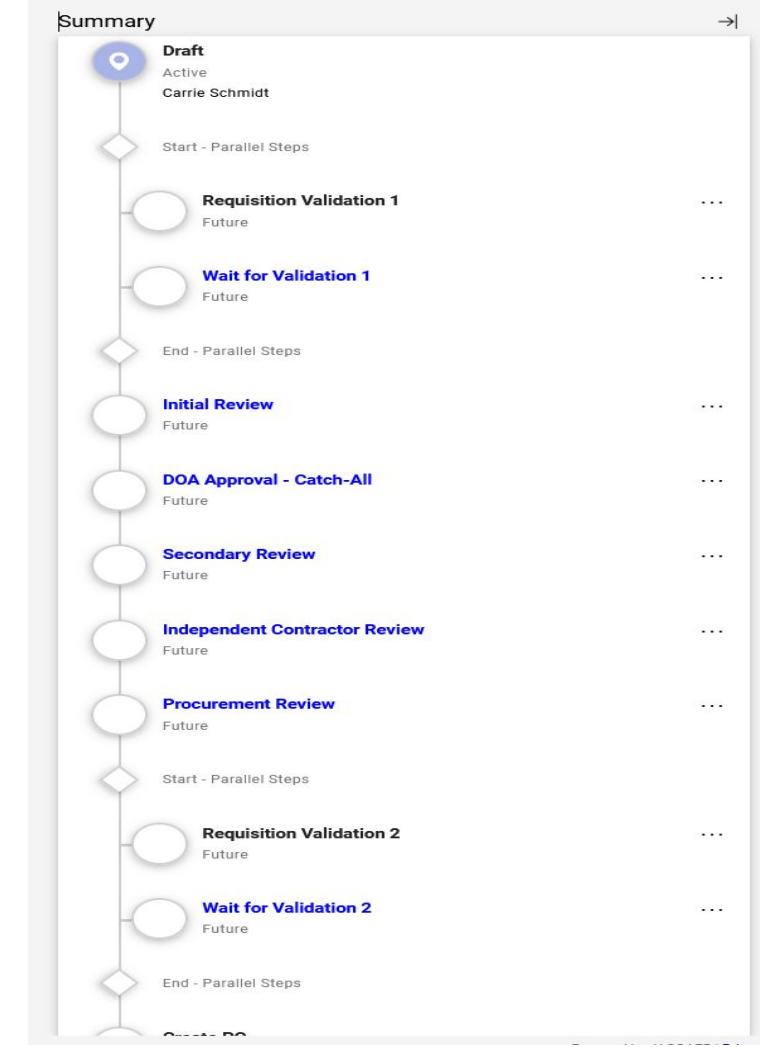
Chartfield

Values vary by line.

Other Participant Information		Internal Notes and Attachments		External Notes and Attachments	
Prepared by	Carrie Schmidt	Internal Note	<i>no value</i>	Note to all Suppliers	<i>no value</i>
Prepared for	Carrie Schmidt	Internal Attachments	<a href="#">Add</a>	Attachments for all suppliers	<a href="#">Add</a>
Buyer	<i>no value</i>				
Ad-Hoc Approver	<a href="#">Select</a>				

15,000 Items

Consultant, David • 15,000 Items • 15,000.00 USD



❖ A requisition and purchase order will be generated but the workflow will be different. Procurement review for these will be the Director of Procurement.

# Q&A

# Module 6-Detailed Functionality

- ❖ Blanket PO
- ❖ Multiple Line PO
- ❖ Ad-Hoc Approver
- ❖ Comments
- ❖ Internal Notes and Attachments
- ❖ External Notes and Attachments
- ❖ Assets
- ❖ Withdraw a Requisition
- ❖ Copy to New Cart
- ❖ Multiple Year PO

# Blanket PO

The screenshot shows a web-based form for a 'Goods and Services Request'. The top navigation bar includes 'Shop', 'Shopping', 'View Forms', and a 'Back to Requisition' link. The main content area is titled 'Form Fields - General Information'.

**Goods and Services Requ...** (highlighted with a red box)

Form Number	1027535
Purpose	Procurement Request
Status	On Document

Instructions

Suppliers ✓

Form Fields ✓

**General Information** ✓

Other Goods & Services ✓

Cost Details ✓

Review and Submit

**Form Fields - General Information**

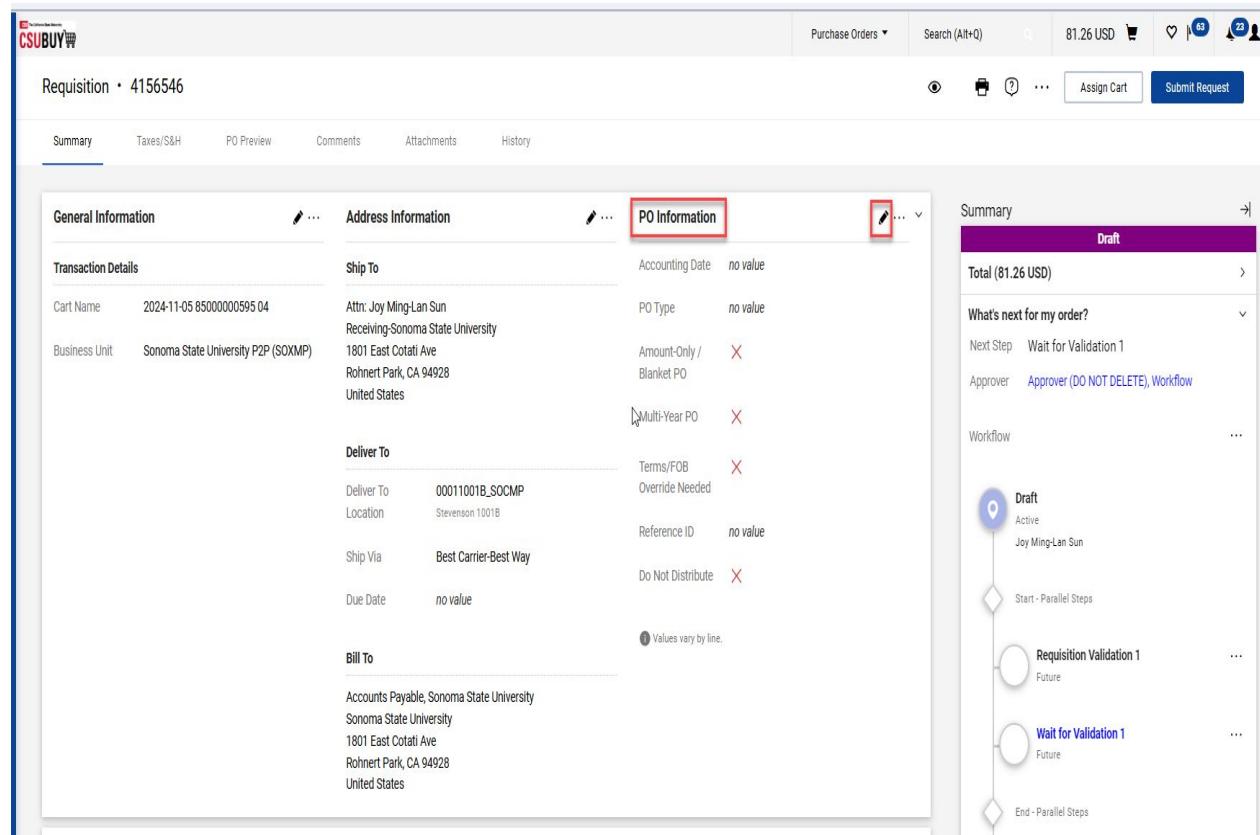
**General Information**

What type of goods or services are you requesting? ★

Is this a Blanket Order? ★

Yes  No

# Blanket PO



Requisition • 4156546

Purchase Orders ▾ Search (Alt+Q) 81.26 USD Cart 43 22

Summary Taxes/S&H PO Preview Comments Attachments History

**General Information**

**Address Information**

**PO Information**

**Transaction Details**

Ship To Accounting Date no value

Cart Name 2024-11-05 85000000595 04 Attr: Joy Ming-Lan Sun

Receiving: Sonoma State University

Business Unit Sonoma State University P2P (SOXMP) 1801 East Cotati Ave

Rohnert Park, CA 94928 United States

PO Type no value

Amount-Only / Blanket PO

Multi-Year PO

Deliver To

Deliver To 00011001B\_SOCMP Terms/FOB Override Needed

Location Stevenson 1001B Reference ID no value

Ship Via Best Carrier-Best Way Do Not Distribute

Due Date no value

Bill To

Accounts Payable, Sonoma State University  
Sonoma State University  
1801 East Cotati Ave  
Rohnert Park, CA 94928 United States

Values vary by line.

**Summary**

**Draft**

Total (81.26 USD)

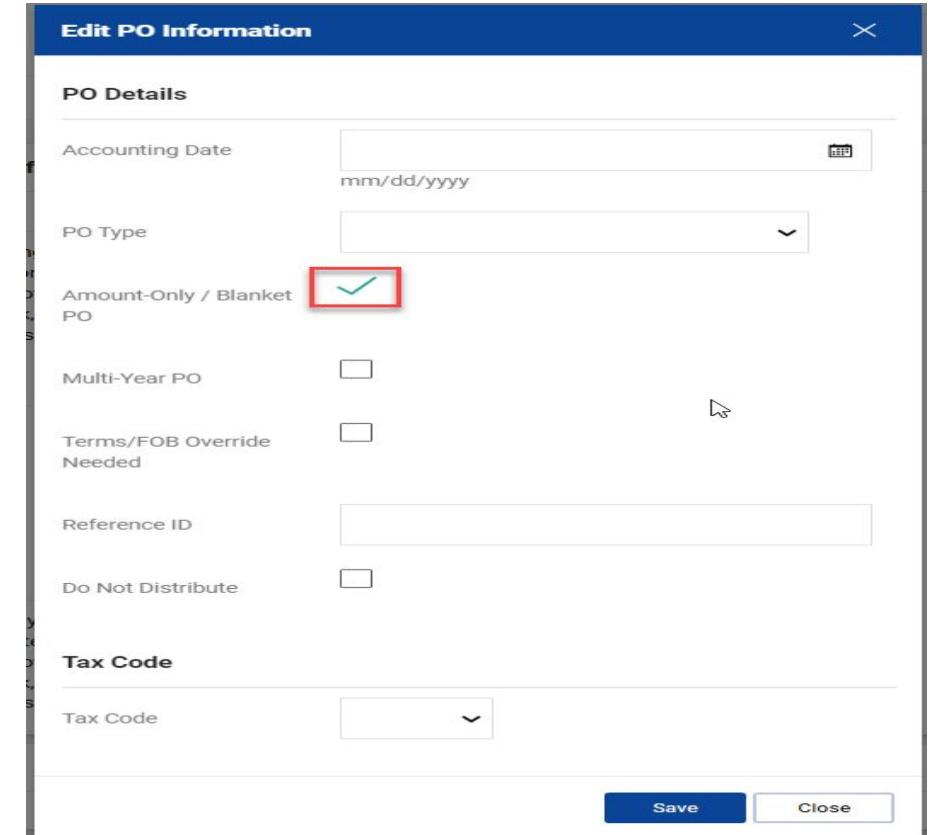
What's next for my order?

Next Step: Wait for Validation 1

Approver: Approver (DO NOT DELETE), Workflow

**Workflow**

```
graph TD; Draft((Draft)) --> Start((Start - Parallel Steps)); Start --> ReqValidation1((Requisition Validation 1)); ReqValidation1 --> WaitValidation1((Wait for Validation 1)); WaitValidation1 --> End((End - Parallel Steps))
```



### Edit PO Information

**PO Details**

Accounting Date mm/dd/yyyy

PO Type

Amount-Only / Blanket PO  ✓

Multi-Year PO

Terms/FOB Override Needed

Reference ID

Do Not Distribute

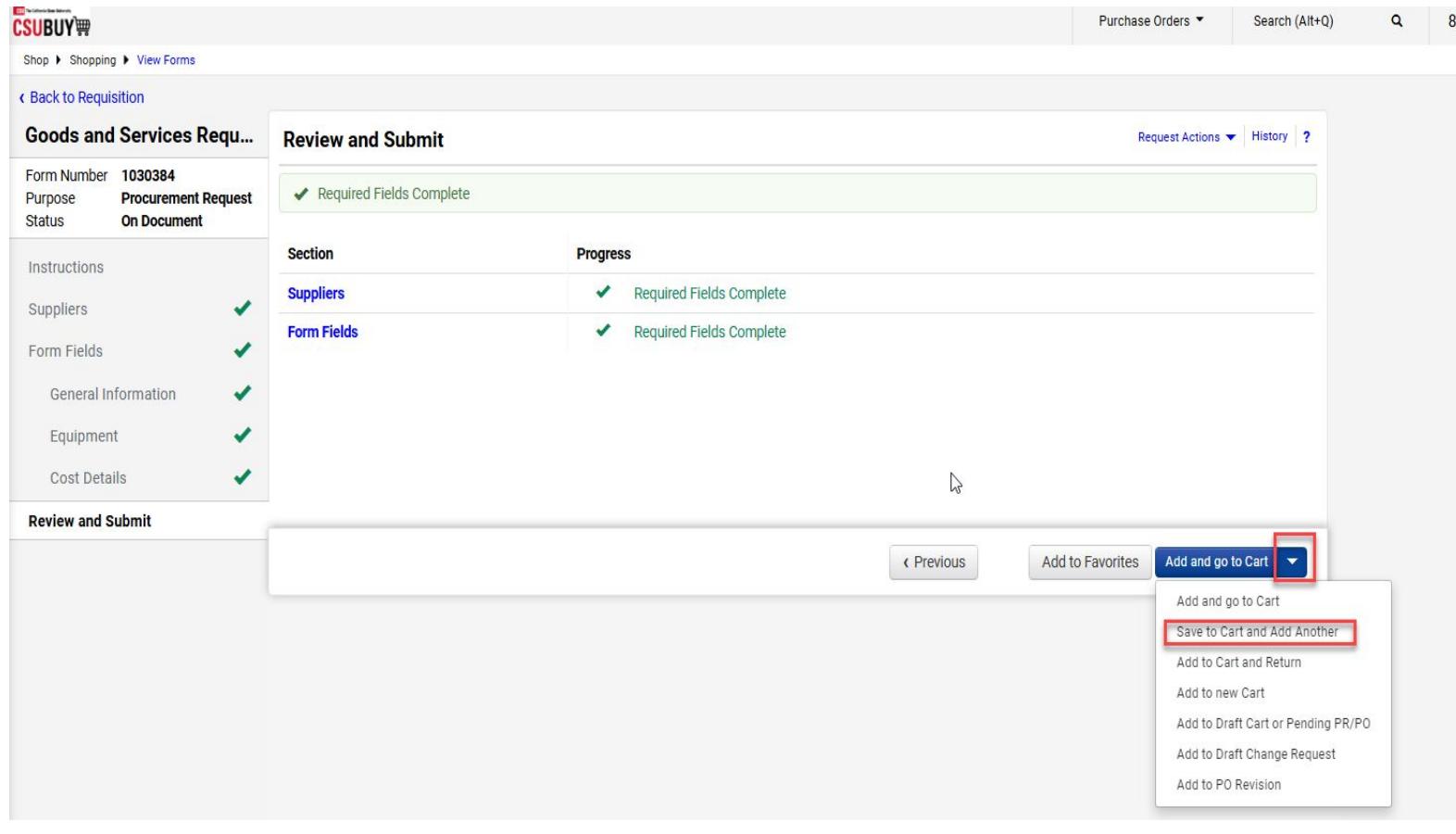
**Tax Code**

Tax Code

**Buttons**

Save Close

# Multiple Line PO



The screenshot shows the 'Review and Submit' page for a 'Procurement Request' with Form Number 1030384. The 'Required Fields Complete' section is highlighted. The 'Progress' table shows 'Suppliers' and 'Form Fields' both as 'Required Fields Complete'. A dropdown menu for 'Add and go to Cart' is open, with the 'Save to Cart and Add Another' option highlighted.

How to create a multiple-line requisition:

1. Complete the first item/line, on the "Review and Submit" page, click on the **down arrow** next to Add and go to Cart, and click **"Save to Cart and Add Another"**.
2. Repeat step 1 for each line.
3. For the last line, on the Review and Submit page, click **"Add and go to Cart"**

- ❖ If the quote/proposal has multiple lines, you must create multiple lines requisition.

# Comments

CSUBUY

Requisition • 4361828

Summary Taxes/S&H PO Preview Comments Attachments History

General Information		Address Information		PO Information	
Transaction Details		Ship To		Accounting Date	
Cart Name	2025-09-18 05000010639 01	Attn: Chris Lam-Vazquez c/o Shipping and Receiving 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States		PO Type	<i>no value</i>
Business Unit	EB: Cal State East Bay P2P (EBXMP)			Amount-Only / Blanket PO	<span style="color: red;">X</span>
				Multi-Year PO	<span style="color: red;">X</span>
		Deliver To		Terms/FOB Override	<span style="color: red;">X</span>
		Deliver To Location	AE0111A_EBCMP OFFICE	Needed	
		Ship Via	Best Carrier-Best Way	Reference ID	<i>no value</i>
		Due Date	<i>no value</i>	Do Not Distribute	<span style="color: red;">X</span>
		Bill To			
		Accounts Payable, CSU East Bay 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States			
Chartfield					
<small>Values vary by line.</small>					

# Comments

Comments become a permanent record and can be viewed by any one.

Requisition • 4361828

Summary Taxes/S&H PO Preview **Comments** Attachments History

Records found: 0 Show comments for Requisition +

**ADD COMMENT** ✓ ×

Procurement, please reach out should you have any question(s). Thank you.

925 characters remaining [expand](#) [clear](#)

This will add a comment to the document.

Attach file (optional)

Attachment Type  File  Link/URL

File Name

File [Choose File](#) PC-Spec-Sheet-CAN-10x10-DP-STEEL-edit-1-1.pdf-2.pdf

No comments have been added

# Internal/External Notes and Attachments

Requisition • 4361828

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

Multi-Year PO 

**Deliver To**

Deliver To Location	AE0111A_EBCMP OFFICE	Terms/FOB Override Needed 
Ship Via	Best Carrier-Best Way	Reference ID no value
Due Date	no value	Do Not Distribute 

**Bill To**

Accounts Payable, CSU East Bay 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States
--

**Chartfield**

Values vary by line.

**Other Participant Information**

Prepared by	Chris Lam-Vazquez
Prepared for	Chris Lam-Vazquez
Buyer	no value
Ad-Hoc Approver	<a href="#">Add</a>

**Internal Notes and Attachments**

Internal Note	no value	
Internal Attachments	Date	<a href="#">Add</a>
<a href="#">Specification</a>	9/18/2025	<a href="#">...</a>

**External Notes and Attachments**

Note to all Suppliers	no value
Attachments for all suppliers	<a href="#">Add</a>

**Summary**

Sales Tax  
Use Tax

**What's next for my order?**

Next Step **Procurement Review**

Approvers [Ballinger, Thomas Jr](#) [Lam-Vazquez, Chris](#) [Patel, Bhavesh](#)

**Workflow**

```
graph TD; Draft((Draft)) --> OFAC1((OFAC Check)); OFAC1 --> ProcReview((Procurement Review)); ProcReview --> OFAC2((OFAC Check 2)); OFAC2 --> CreatePO((Create PO)); CreatePO --> Finish((Finish))
```

Draft  
Active  
Chris Lam-Vazquez

OFAC Check  
Future

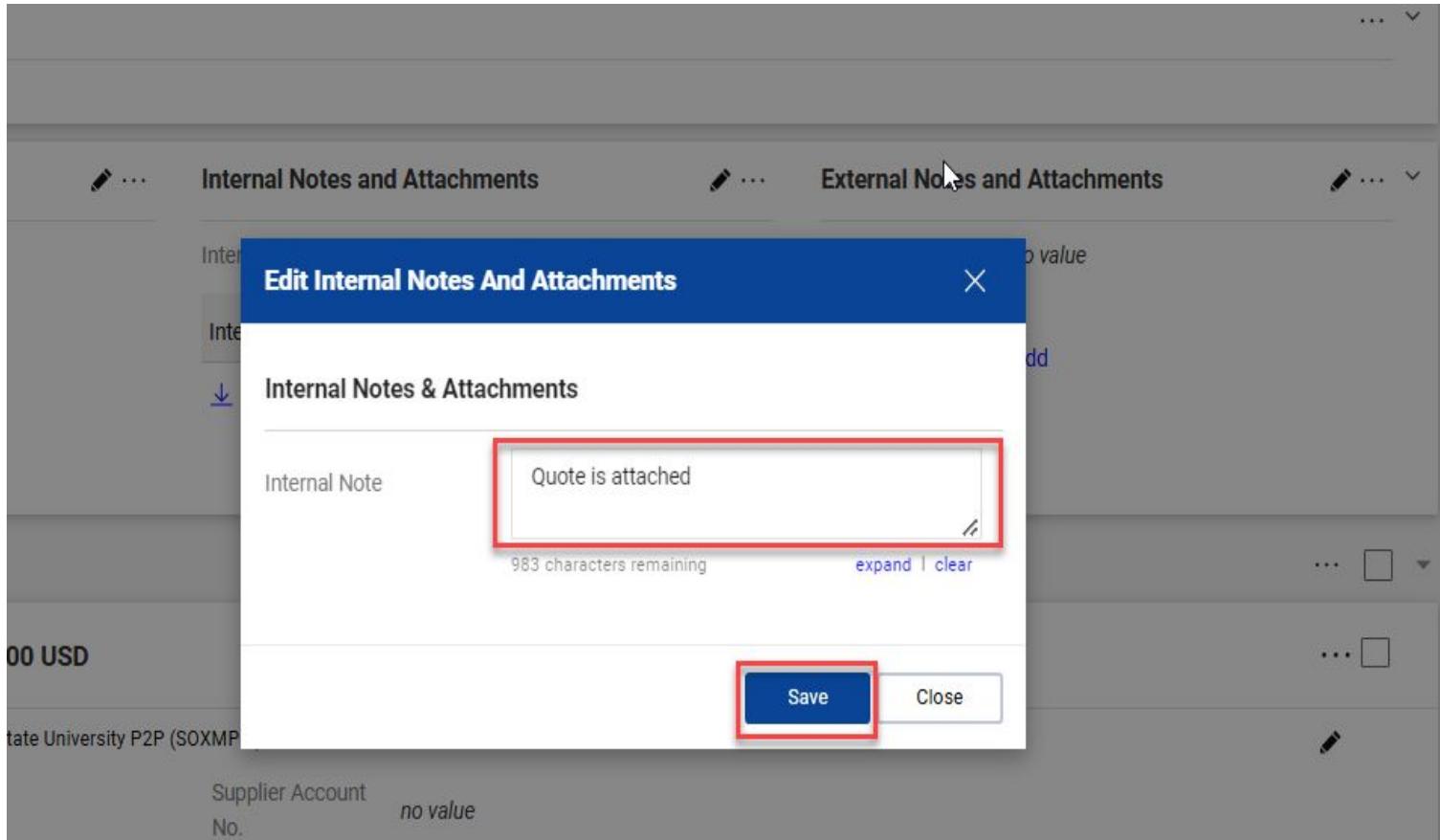
Procurement Review  
Future

OFAC Check 2  
Future

Create PO  
Future

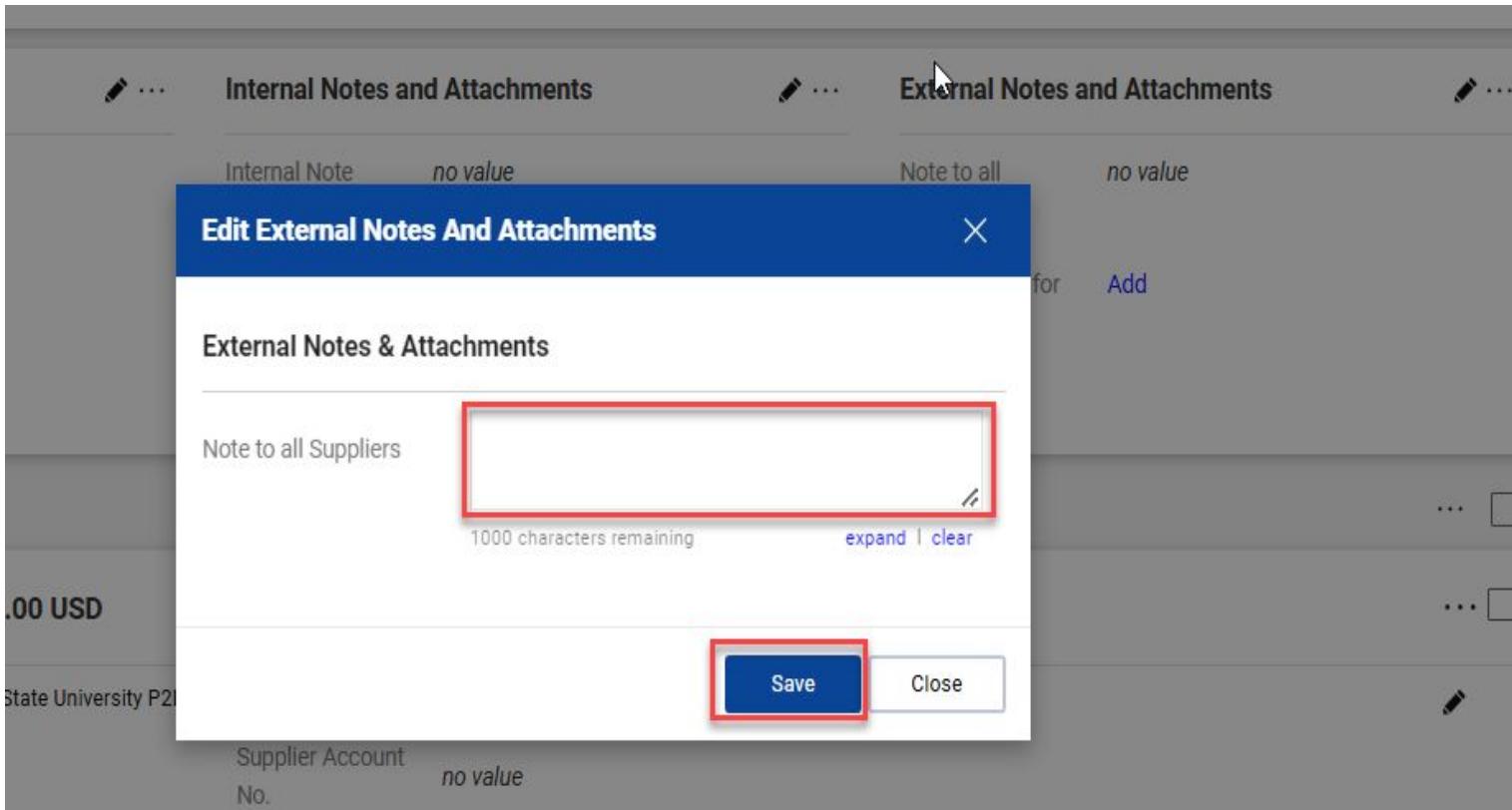
Finish

# Internal/External Notes and Attachments



- ❖ Internal notes and attachments stay within CSUBUY and can be viewed by any one has access to CSUBUY.

# Internal/External Notes and Attachments



- ❖ External notes and attachments can be viewed by any one has access to CSUBUY and Suppliers.

# Withdraw a Requisition

Requisition • 4148303

Approve/Complete & Show Next  52 of 383 Results 

Approve & Next

Approve

Return to Shared Folder

Place on Hold

Return to Requisitioner

Forward to ...

Withdraw Entire Requisition 

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

**SUPPLIER DETAILS**  Sonoma State University P2P (SOXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract no value Supplier Account No. no value

Quote number no value PO Clauses Add/View

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
 Independent Contractor Request						

Withdraw Entire Requisition

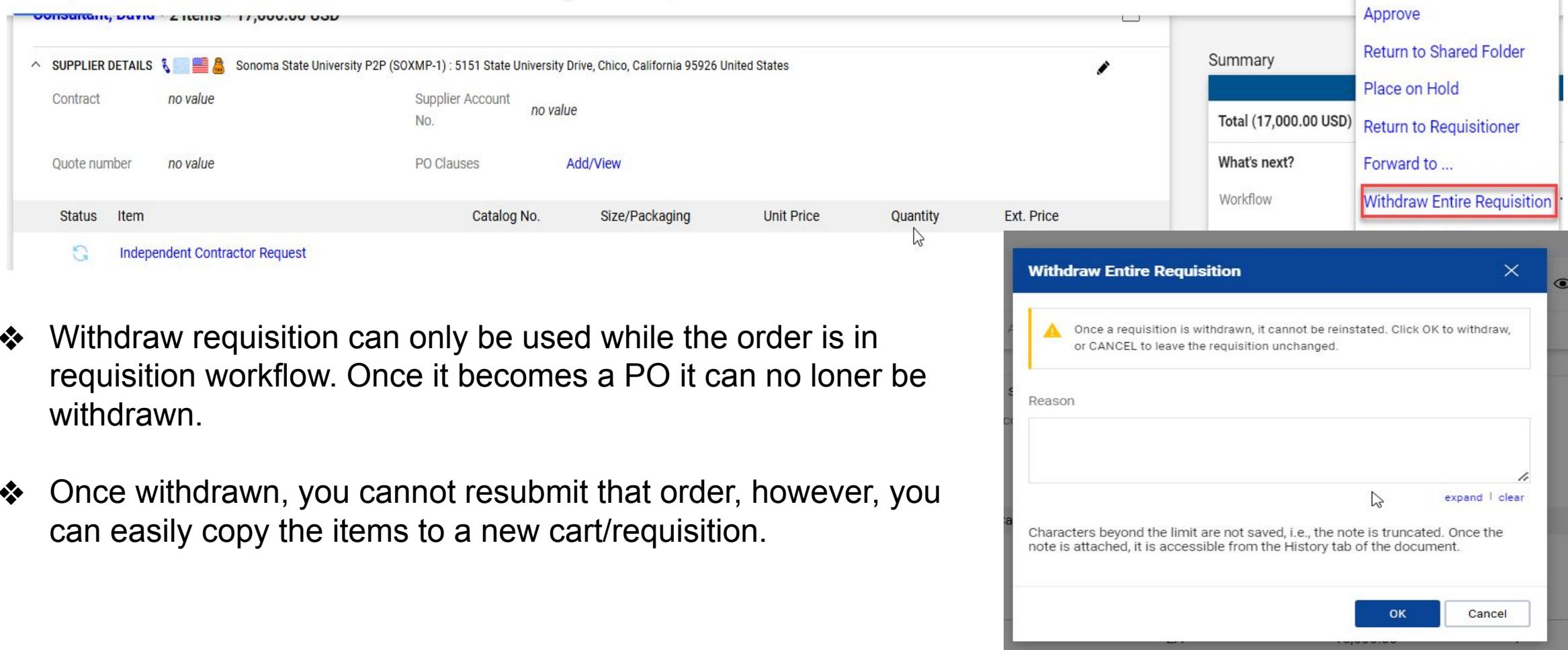
Once a requisition is withdrawn, it cannot be reinstated. Click OK to withdraw, or CANCEL to leave the requisition unchanged.

Reason

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.

OK Cancel



# Copy to New Cart

CSUBUY

Requisition • 4358649

All ▾ Search (Alt+Q) 0.00 USD 50 50

3 of 68 Results ▾

Summary Taxes/S&H PO Preview Comments Attachments History

General Information

Transaction Details

Status Pending  
IT Review

Cart Name 2025-09-12 05000010639 01

Business Unit EB: Cal State East Bay P2P (EBXMP)

Submitted 9/12/2025 3:31 PM

Address Information

Ship To

Attn: Chris Lam-Vazquez  
c/o Shipping and Receiving  
25800 Carlos Bee Blvd  
Hayward, CA 94542-3000  
United States

PO Information

Accounting Date no value

PO Type no value

Amount-Only / Blanket

PO

Multi-Year PO

Terms/FOB Override  
Needed

Reference ID no value

Do Not Distribute

Deliver To

Deliver To Location AE0111A\_EBCMP  
OFFICE

Ship Via Best Carrier-Best Way

Due Date no value

Bill To

Accounts Payable, CSU East Bay  
25800 Carlos Bee Blvd  
Hayward, CA 94542-3000  
United States

Chartfield

Values vary by line.

Other Participant Information

Prepared by Chris Lam-Vazquez

Prepared for Chris Lam-Vazquez

Internal Notes and Attachments

Internal Note no value

External Notes and Attachments

Note to all Suppliers no value

Attachments for all

Withdraw Entire Requisition

Copy to New Cart

Add Comment

Add Notes to History

View My Orders (Last 90 Days)

Continue Shopping

View Carts

Subtotal 10,000.00

Sales Tax 1,075.00

Use Tax 0.00

**11,075.00**

What's next?

Workflow

Submitted 9/12/2025 3:31 PM  
Submitted • 9/12/2025 3:31 PM • Chris Lam-Vazquez

IT Review Pending - Unassigned

OFAC Check Future

Procurement Review Future

OFAC Check 2 Future

# Multiple-Year PO

## 1. Requestor

- ❖ Build multiple lines in the cart. Follow the “Multiple Line PO” instruction.
- ❖ Make sure to label each line with year (Year 1 - 2025, Year 2 – 2026....)and description in Cost Detail.
- ❖ Submit the Requisition. In the PO Information, check “Multiple-Year PO”.

## 2. During Procurement Review (Buyer)

- ❖ Reduce the amount on the subsequent year PO line to \$0.01 so PO will not be closed.

## 3. Requestor

- ❖ Submit “Change Request” each year to encumber the fund

# Multiple-Year PO

CSUBUY

Shopping Cart • Shopping Cart

Quality Classroom Supplies • 3 Items • 90,000.00 USD

All • Search (Alt+Q) • 90,000.00 USD • Assign Cart • Proceed To Checkout

**SUPPLIER DETAILS** Cal State East Bay (EBXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract: no value

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Year 1 of 3: Repair/Maintenance of musical instruments. Procurement Request: Goods and Services Request		YR	30,000.00	Qty: 1	30,000.00
2	Year 2 of 3: Repair/Maintenance of musical instruments. Procurement Request: Goods and Services Request		YR	30,000.00	Qty: 1	30,000.00
3	Year 3 of 3: Repair/Maintenance of musical instruments. Procurement Request: Goods and Services Request		YR	30,000.00	Qty: 1	30,000.00

**ITEM DETAILS**

Performance Start Date: 7/1/2025 Commodity Code: 160001 Taxable:

Performance End Date: 6/30/2026 General Services Asset:

[more info...](#) Receiving Required: No

**ITEM DETAILS**

Performance Start Date: 7/1/2026 Commodity Code: 160001 Taxable:

Performance End Date: 6/30/2027 General Services Asset:

[more info...](#) Receiving Required: No

**ITEM DETAILS**

Performance Start Date: 7/1/2027 Commodity Code: 160001 Taxable:

Performance End Date: 6/30/2028 General Services Asset:

[more info...](#) Receiving Required: No

**Summary**

**Details**

**Total (90,000.00 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	90,000.00
Sales Tax	0.00
Use Tax	0.00
<b>Total</b>	<b>90,000.00</b>

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# Multiple Line PO

Requisition • 4361984

CSBUY

Summary Taxes/S&H PO Preview Comments Attachments History

General Information		Address Information		PO Information	
Transaction Details		Ship To		PO Type	
Cart Name	2025-09-18 05000010639 01	Attn: Chris Lam-Vazquez c/o Shipping and Receiving 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States		Accounting Date	9/18/2025
Business Unit	EB: Cal State East Bay P2P (EBXMP)	Deliver To		Amount-Only / Blanket PO	<input checked="" type="checkbox"/>
		Deliver To Location	MB1577_EBCMP MUSIC EDUCATION LAB	Multi-Year PO	<input checked="" type="checkbox"/>
		Ship Via	Best Carrier-Best Way	Terms/FOB Override Needed	<input type="checkbox"/>
		Due Date	no value	Reference ID	no value
		Bill To		Do Not Distribute	<input type="checkbox"/>
		Accounts Payable, CSU East Bay 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States		PO Type	SB - Service Blanket
				Amount-Only / Blanket PO	<input checked="" type="checkbox"/>
				Multi-Year PO	<input checked="" type="checkbox"/>
				Terms/FOB Override Needed	<input type="checkbox"/>
				Reference ID	<input type="text"/>
				Do Not Distribute	<input type="checkbox"/>

**Edit PO Information**

PO Details

Accounting Date: 9/18/2025

PO Type: SB - Service Blanket

Amount-Only / Blanket PO:

Multi-Year PO:

Terms/FOB Override Needed:

Reference ID:

Do Not Distribute:

Save Close

# Q&A

# Module 7-Purchase Orders

- ❖ Purchase Order Distribution
- ❖ Search for Purchase Orders & Locate Order Status
- ❖ Purchase Order Overview
- ❖ Purchase Order Change Requests
- ❖ Close a Purchase Order

# Purchase Order Distribution

- ❖ There are 2 ways to distribute PO. The supplier's preferred PO distribution method is specified by the supplier during the registration process.
  - Method 1 Email - CSUBUY sends POs to the suppliers automatically. Department will not be copied.  
**or**  
• Method 2 Manual – Buyer will distribute the PO to the supplier.
- ❖ Department can access CSUBUY and view PO.
- ❖ Department should never send PO to supplier.
- ❖ Set your notification preference is set up received notification once PO is distributed by CSUBUY.

# Purchase Order Distribution

Purchase Order • Acme Corporation • 240003542T Revision 0

🖨️ 🌐 ⋮ 2 of 23 Results ⏪ ⏪

Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests	Receipts	Vouchers	Comments	Attachments	History																																								
<div><h3>General Information</h3><table><tbody><tr><td>Supplier Name</td><td colspan="3">Acme Corporation</td></tr><tr><td>Purchase Order No.</td><td colspan="3">240003542T</td></tr><tr><td>Purchase Order Date</td><td colspan="3">8/27/2025</td></tr><tr><td>Revision No.</td><td colspan="3">0</td></tr><tr><td>Revision Date</td><td colspan="3">8/27/2025</td></tr><tr><td>Owner Name</td><td colspan="3">Chris Lam-Vazquez</td></tr><tr><td>Owner Email</td><td colspan="3">chris.lam-vazquez@csueastbay.edu</td></tr></tbody></table><h3>Document Status</h3><table><tbody><tr><td>Requisition Number</td><td>4341509 <a href="#">view</a>   <a href="#">print</a></td></tr><tr><td>Workflow</td><td>✓ Completed (8/27/2025 9:09 AM)</td></tr><tr><td>PO Status</td><td>Open</td></tr><tr><td>Distribution Status</td><td>Sent To Supplier</td></tr></tbody></table><p>The system distributed the purchase order using the method(s) indicated below the last time it was distributed: <a href="#">view</a></p><table><tbody><tr><td>Email (HTML Body)</td><td>somebody@nobody.com</td></tr><tr><td>Distribution Date/Time</td><td>8/27/2025 9:09 AM</td></tr></tbody></table></div>											Supplier Name	Acme Corporation			Purchase Order No.	240003542T			Purchase Order Date	8/27/2025			Revision No.	0			Revision Date	8/27/2025			Owner Name	Chris Lam-Vazquez			Owner Email	chris.lam-vazquez@csueastbay.edu			Requisition Number	4341509 <a href="#">view</a>   <a href="#">print</a>	Workflow	✓ Completed (8/27/2025 9:09 AM)	PO Status	Open	Distribution Status	Sent To Supplier	Email (HTML Body)	somebody@nobody.com	Distribution Date/Time	8/27/2025 9:09 AM
Supplier Name	Acme Corporation																																																	
Purchase Order No.	240003542T																																																	
Purchase Order Date	8/27/2025																																																	
Revision No.	0																																																	
Revision Date	8/27/2025																																																	
Owner Name	Chris Lam-Vazquez																																																	
Owner Email	chris.lam-vazquez@csueastbay.edu																																																	
Requisition Number	4341509 <a href="#">view</a>   <a href="#">print</a>																																																	
Workflow	✓ Completed (8/27/2025 9:09 AM)																																																	
PO Status	Open																																																	
Distribution Status	Sent To Supplier																																																	
Email (HTML Body)	somebody@nobody.com																																																	
Distribution Date/Time	8/27/2025 9:09 AM																																																	
<div><h3>Line Details</h3><table><thead><tr><th>Line</th><th>Status</th><th>Item</th><th>Catalog No.</th><th>Size/Packaging</th><th>Unit Price</th><th>Quantity</th><th>Ext. Price</th></tr></thead><tbody><tr><td>1</td><td>✓</td><td>Desks Procurement Request: Goods and Services Request</td><td></td><td>EA</td><td>129.00</td><td>3</td><td>387.00</td></tr></tbody></table><p>^ DETAILS</p><table><thead><tr><th>Supplier</th><th>Receiving</th><th>Invoicing</th><th>Matching</th></tr></thead><tbody><tr><td>Sent To Supplier</td><td>none</td><td>none</td><td>No Matches</td></tr></tbody></table><table><tbody><tr><td>2</td><td>✓</td><td>test Procurement Request: Goods and Services Request</td><td></td><td>EA</td><td>1.00</td><td>1</td><td>1.00</td></tr></tbody></table></div>											Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	1	✓	Desks Procurement Request: Goods and Services Request		EA	129.00	3	387.00	Supplier	Receiving	Invoicing	Matching	Sent To Supplier	none	none	No Matches	2	✓	test Procurement Request: Goods and Services Request		EA	1.00	1	1.00								
Line	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price																																											
1	✓	Desks Procurement Request: Goods and Services Request		EA	129.00	3	387.00																																											
Supplier	Receiving	Invoicing	Matching																																															
Sent To Supplier	none	none	No Matches																																															
2	✓	test Procurement Request: Goods and Services Request		EA	1.00	1	1.00																																											

### Summary

Completed
Details
Total (429.60 USD)
Related Documents
Requisition: 4341509

### What's next?

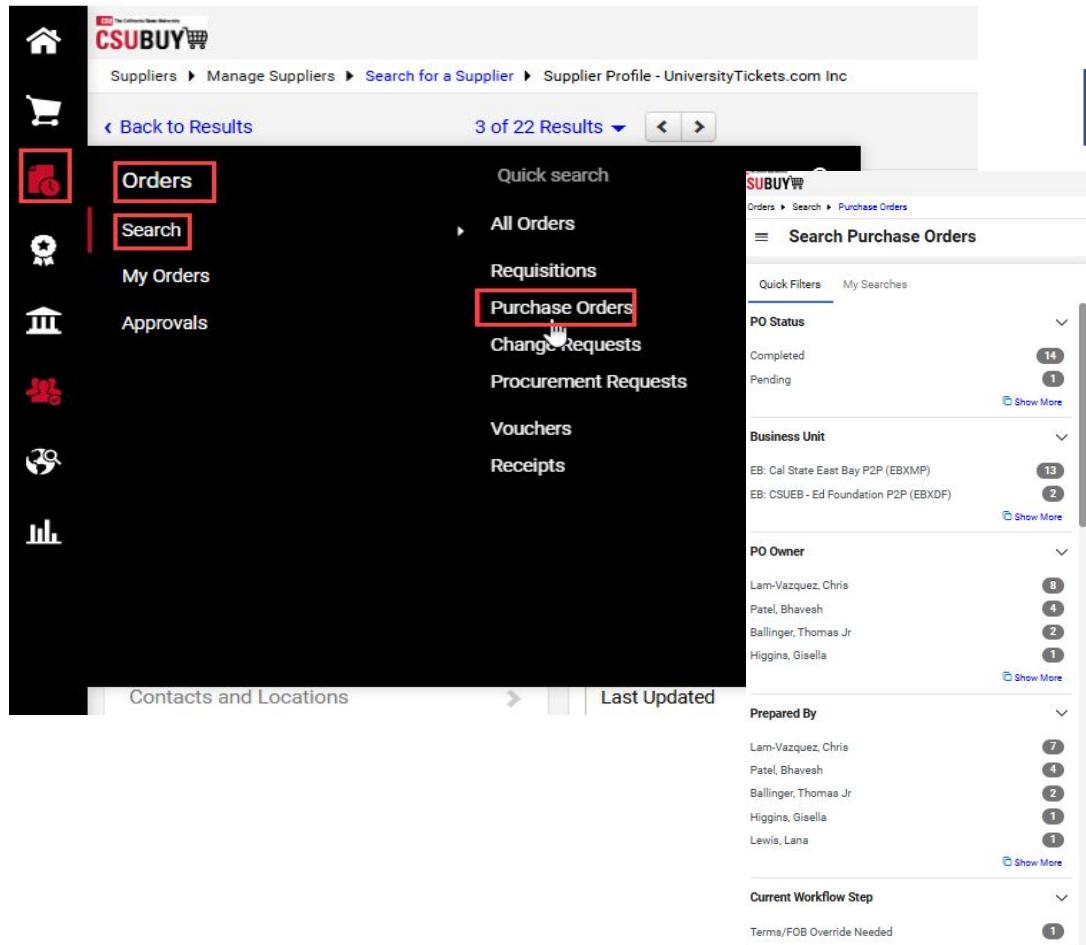
Workflow Status: Completed

Workflow:

- Submitted 8/27/2025 9:09 AM · Submitted · 8/27/2025 9:09 AM · Chris Lam-Vazquez
- Revise PO Completed
- PO Distribution Completed
- Export PO to CFS Completed
- Completed 8/27/2025 9:09 AM

# Search for Purchase Orders

## If you are not the PO Owner



Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile - UniversityTickets.com Inc

Back to Results 3 of 22 Results < >

Orders

Search

My Orders

All Orders

Requisitions

**Purchase Orders**

Change Requests

Procurement Requests

Vouchers

Receipts

Contacts and Locations

Last Updated

Quick search

Quick Filters My Searches

PO Status

- Completed 14
- Pending 1

Business Unit

- EB: Cal State East Bay P2P (EBXMP) 13
- EB: CSUEB - Ed Foundation P2P (EBXDF) 2

PO Owner

- Lam-Vazquez, Chris 8
- Patel, Bhavesh 4
- Ballinger, Thomas Jr 2
- Higgins, Gisella 1

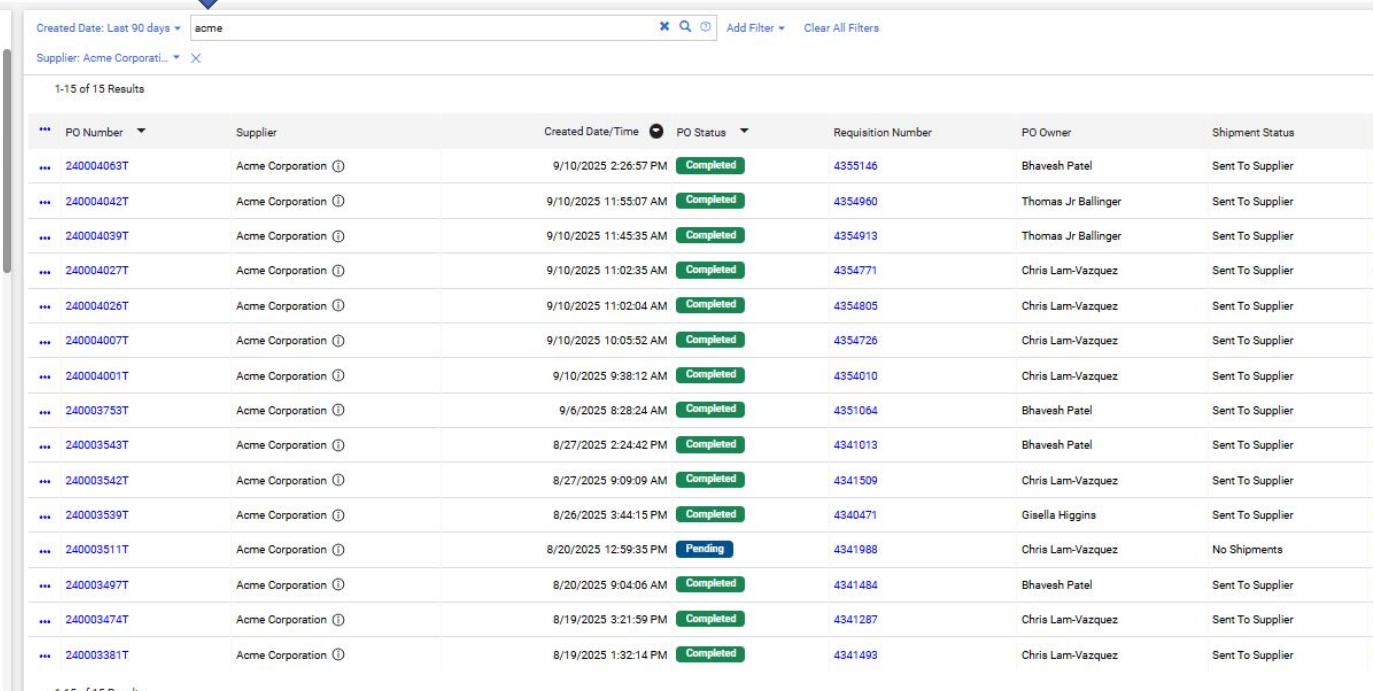
Prepared By

- Lam-Vazquez, Chris 7
- Patel, Bhavesh 4
- Ballinger, Thomas Jr 2
- Higgins, Gisella 1
- Lewis, Lana 1

Current Workflow Step

- Terms/FOB Override Needed 1

Type in PO number, supplier name, PO owner name.....



PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status
240004069T	Acme Corporation	9/10/2025 2:26:57 PM	Completed	4355146	Bhavesh Patel	Sent To Supplier
240004042T	Acme Corporation	9/10/2025 11:55:07 AM	Completed	4354960	Thomas Jr Ballinger	Sent To Supplier
240004039T	Acme Corporation	9/10/2025 11:45:35 AM	Completed	4354913	Thomas Jr Ballinger	Sent To Supplier
240004027T	Acme Corporation	9/10/2025 11:02:35 AM	Completed	4354771	Chris Lam-Vazquez	Sent To Supplier
240004026T	Acme Corporation	9/10/2025 11:02:04 AM	Completed	4354805	Chris Lam-Vazquez	Sent To Supplier
240004007T	Acme Corporation	9/10/2025 10:05:52 AM	Completed	4354726	Chris Lam-Vazquez	Sent To Supplier
240004001T	Acme Corporation	9/10/2025 9:38:12 AM	Completed	4354010	Chris Lam-Vazquez	Sent To Supplier
240003753T	Acme Corporation	9/6/2025 8:28:24 AM	Completed	4351064	Bhavesh Patel	Sent To Supplier
240003543T	Acme Corporation	8/27/2025 2:24:42 PM	Completed	4341013	Bhavesh Patel	Sent To Supplier
240003542T	Acme Corporation	8/27/2025 9:09:09 AM	Completed	4341509	Chris Lam-Vazquez	Sent To Supplier
240003539T	Acme Corporation	8/26/2025 3:44:15 PM	Completed	4340471	Gisella Higgins	Sent To Supplier
240003511T	Acme Corporation	8/20/2025 12:59:35 PM	Pending	4341988	Chris Lam-Vazquez	No Shipments
240003497T	Acme Corporation	8/20/2025 9:04:06 AM	Completed	4341484	Bhavesh Patel	Sent To Supplier
240003474T	Acme Corporation	8/19/2025 3:21:59 PM	Completed	4341287	Chris Lam-Vazquez	Sent To Supplier
240003381T	Acme Corporation	8/19/2025 1:32:14 PM	Completed	4341493	Chris Lam-Vazquez	Sent To Supplier

# Search for Purchase Orders

## If you are the PO Owner

Suppliers ▶ Manage Suppliers ▶ Search for a Supplier ▶ Supplier Profile - UniversityTickets.com Inc

Back to Results 3 of 22 Results

Orders

Search

My Orders

My Purchase Orders

My Vouchers

My Receipts

My Change Requests

Draft Change Requests

My Procurement Requests

Quick search

My Requisitions

My Purchase Orders

Supplier

Acme Corporation

Flooring by Fernando

Academic Recruiting Services

Megan's Marvelous Marketing

Edwin's Equipment New & Refurbished

PO Status

Completed

Pending

Business Unit

EB: Cal State East Bay P2P (EBXMP)

EB: CSUEB - Foundation, Inc. P2P (EBXDN)

EB: CSUEB - Ed Foundation P2P (EBXDF)

Prepared By

Lam-Vazquez, Chris

Lewis, Lana

Libiran, Sonia

Current Workflow Step

Terms/FOB Override Needed

Invalid Distribution

Manual PO Distribution

PO Invoice Status

No Vouchers

Fully Invoiced

Created Date: Last 90 days

Quick search

PO Owner: Lam-Vazquez, ...

Page 1 of 2 1-20 of 23 Results

PO Number Supplier Created Date/Time PO Status Requisition Number PO Owner Shipment Status Matching Status Total Amount

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
240004073T	Flooring by Fernando	9/11/2025 8:26:40 AM	Completed	4356704	Chris Lam-Vazquez	Sent To Supplier	No Matches	54,267.50 USD
240004072T	Flooring by Fernando	9/11/2025 8:25:12 AM	Completed	4356694	Chris Lam-Vazquez	Sent To Supplier	No Matches	166,125.00 USD
240004052T	*Supplier Not Known	9/10/2025 1:40:54 PM	Pending	4354892	Chris Lam-Vazquez	No Shipments	No Matches	443.00 USD
240004033T	Edwin's Equipment New & Refurbished	9/10/2025 11:22:35 AM	Completed	4354841	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	100,000.00 USD
240004032T	Megan's Marvelous Marketing	9/10/2025 11:19:34 AM	Completed	4354795	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	100,000.00 USD
240004027T	Acme Corporation	9/10/2025 11:02:35 AM	Completed	4354771	Chris Lam-Vazquez	Sent To Supplier	No Matches	150,000.00 USD
240004026T	Acme Corporation	9/10/2025 11:02:44 AM	Completed	4354805	Chris Lam-Vazquez	Sent To Supplier	No Matches	100,000.00 USD
240004007T	Acme Corporation	9/10/2025 10:05:52 AM	Completed	4354726	Chris Lam-Vazquez	Sent To Supplier	No Matches	1,550.50 USD
240004003T	Victor's Vehicle & Repair	9/10/2025 9:43:05 AM	Pending	4354575	Chris Lam-Vazquez	No Shipments	No Matches	22,150.00 USD
240004002T	Quality Classroom Supplies	9/10/2025 9:38:43 AM	Completed	4353869	Chris Lam-Vazquez	Sent To Supplier	No Matches	667.82 USD
240004001T	Acme Corporation	9/10/2025 9:38:12 AM	Completed	4354010	Chris Lam-Vazquez	Sent To Supplier	No Matches	2,215.00 USD
240003998T	Megan's Marvelous Marketing	9/10/2025 9:22:13 AM	Completed	4354441	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	2,768.75 USD
240003570T	Outstanding Officiating	9/4/2025 8:51:18 AM	Completed	4345907	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	5,000.00 USD
240003569T	Edwin's Equipment New & Refurbished	9/4/2025 8:49:17 AM	Completed	4345873	Chris Lam-Vazquez	Sent To Supplier	No Matches	3,765.50 USD
240003542T	Acme Corporation	8/27/2025 9:00:09 AM	Completed	4341509	Chris Lam-Vazquez	Sent To Supplier	No Matches	429.60 USD
240003511T	Acme Corporation	8/20/2025 12:59:33 PM	Pending	4341988	Chris Lam-Vazquez	No Shipments	No Matches	525.26 USD
240003498T	Academic Recruiting Services	8/20/2025 9:04:34 AM	Completed	4341450	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	10,000.00 USD
240003474T	Acme Corporation	8/19/2025 3:21:59 PM	Completed	4341287	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	1,803.75 USD
240003473T	Steelcase Distributor	8/19/2025 3:21:41 PM	Completed	4341441	Chris Lam-Vazquez	Sent To Supplier	Fully Matched	332.25 USD
240003471T	BD Biosciences, Inc	8/19/2025 3:16:11 PM	Completed	4341658	Chris Lam-Vazquez	Sent To Supplier	Partially Matched	719.88 USD

# Locate Purchase Order Status

CSU BUY

Orders > Search > Purchase Orders

All | Search (Alt+Q)

## Search Purchase Orders

Quick Filters My Searches

Supplier

Supplier	Count
Acme Corporation	15
Academic Recruiting Services	11
Edwin's Equipment New & Refurbished	8
Consultant, David	6
Jackson Hardware Supply	6
See More	Show More

PO Status

PO Status	Count
Completed	75
Pending	6
See More	Show More

Business Unit

Business Unit	Count
EB: Cal State East Bay P2P (EBXMP)	61
EB: CSUEB - Foundation, Inc. P2P (EBXDN)	10
EB: CSUEB - Ed Foundation P2P (EBXDF)	10
See More	Show More

PO Owner

PO Owner	Count
Lam-Vazquez, Chris	23
Puente, Chris	15
Libiran, Sonia	12
Patel, Bhavesh	11
Ballinger, Thomas Jr	9
See More	Show More

Prepared By

Prepared By	Count
Lam-Vazquez, Chris	21
Puente, Chris	15
Libiran, Sonia	12
Patel, Bhavesh	12
Ballinger, Thomas Jr	9
See More	Show More

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Page 1 of 5 1-20 of 81 Results

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status
240004073T	Flooring by Fernando	9/11/2025 8:26:40 AM	Completed	4356704	Chris Lam-Vazquez	Sent To Supplier
240004072T	Flooring by Fernando	9/11/2025 8:25:12 AM	Completed	4356694	Chris Lam-Vazquez	Sent To Supplier
240004065T	Edwin's Equipment New & Refurbished	9/10/2025 2:36:52 PM	Completed	4355220	Bhavesh Patel	Sent To Supplier
240004063T	Acme Corporation	9/10/2025 2:26:57 PM	Completed	4355146	Bhavesh Patel	Sent To Supplier
240004045T	Globex Co.	9/10/2025 1:20:26 PM	Completed	4355014	Bhavesh Patel	Sent To Supplier
240004042T	Acme Corporation	9/10/2025 11:55:07 AM	Completed	4354960	Thomas Jr Ballinger	Sent To Supplier
240004039T	Acme Corporation	9/10/2025 11:45:35 AM	Completed	4354913	Thomas Jr Ballinger	Sent To Supplier
240004038T	Easy Conference Planning LLC	9/10/2025 11:38:34 AM	Completed	4354889	Thomas Jr Ballinger	No Shipments
240004035T	Consultant, David	9/10/2025 11:25:05 AM	Completed	4354855	Thomas Jr Ballinger	Sent To Supplier
240004036T	Flooring by Fernando	9/10/2025 11:28:38 AM	Completed	4354906	Thomas Jr Ballinger	Sent To Supplier
240004032T	Megan's Marvelous Marketing	9/10/2025 11:19:34 AM	Completed	4354795	Chris Lam-Vazquez	Sent To Supplier
240004033T	Edwin's Equipment New & Refurbished	9/10/2025 11:22:35 AM	Completed	4354841	Chris Lam-Vazquez	Sent To Supplier
240004007T	Acme Corporation	9/10/2025 10:05:52 AM	Completed	4354726	Chris Lam-Vazquez	Sent To Supplier
240004002T	Quality Classroom Supplies	9/10/2025 9:38:43 AM	Completed	4353869	Chris Lam-Vazquez	Sent To Supplier
240004001T	Acme Corporation	9/10/2025 9:38:12 AM	Completed	4354010	Chris Lam-Vazquez	Sent To Supplier
240003998T	Megan's Marvelous Marketing	9/10/2025 9:22:13 AM	Completed	4354441	Chris Lam-Vazquez	Sent To Supplier
240004027T	Acme Corporation	9/10/2025 11:02:35 AM	Completed	4354771	Chris Lam-Vazquez	Sent To Supplier
240004026T	Acme Corporation	9/10/2025 11:02:04 AM	Completed	4354805	Chris Lam-Vazquez	Sent To Supplier
240004010T	Globex Co.	9/10/2025 10:17:02 AM	Completed	4354330	Thomas Jr Ballinger	Sent To Supplier
240004000T	Academic Recruiting Services	9/10/2025 9:32:27 AM	Completed	4353912	Thomas Jr Ballinger	Sent To Supplier

Page 1 of 5 1-20 of 81 Results

# Purchase Order Overview

The California State University (CSU) System Shopping Showcase Home

Status: **Summary** | Revisions: 1 | Confirmations | Shipments | Change Requests | Receipts | Vouchers: 1 | Comments | Attachments | History

**General Information**

**Transaction Details**

Supplier Name: Flooring by Fernando  
 Purchase Order No.: 240004073T  
 Purchase Order Date: 9/11/2025  
 Revision No.: 0  
 Revision Date: 9/11/2025  
 Business Unit Vendor Id: EBXMP-1004408172

**PO Owner Information**

Owner Name: Chris Lam-Vazquez  
 Owner Email: chris.lam-vazquez@csueastbay.edu  
 Owner Business Unit: EB: Cal State East Bay P2P (EBXMP)  
 Owner Department: no value  
 Buyer: 05000111749  
 Bhavesh Patel

**Supplier Information**

Contract: no value  
 Supplier Account No.: no value  
 Quote number: no value  
 Address: 5151 State University Drive  
 Chico, California 95926 United States

**Address Information**

Ship To: Attn: Chris Lam-Vazquez  
 c/o Shipping and Receiving  
 25800 Carlos Bee Blvd  
 Hayward, CA 94542-3000  
 United States

**PO Information**

Accounting Date: no value  
 FY Processing Options: no value  
 PO Type: no value  
 Amount-Only / Blanket PO: X  
 Multi-Year PO: X  
 Deliver To Location: ACCTSREC\_EBCMP  
 ACCOUNTS RECEIVABLE  
 Ship Via: Best Carrier-Best Way  
 Due Date: no value  
 F.O.B.: FOB Destination  
 Bill To: Accounts Payable, CSU East Bay  
 25800 Carlos Bee Blvd  
 Hayward, CA 94542-3000  
 United States

**Notes & Attachments**

Supplier Terms and Conditions: no value  
 Order acceptance instructions: The Purchase Order number shall be referenced on all invoices and on the outside of all packages....  
 PO Clauses: Add

**Summary**

**Completed**

**Details**

Total (54,267.50 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	49,000.00
Sales Tax	5,267.50
Use Tax	0.00
	54,267.50

**Related Documents**

Requisition: 4356704  
 Credit memo: C002925T

**What's next?**

Workflow Status: Completed

Workflow:

- Submitted: 9/11/2025 8:26 AM
- Submitted: 9/11/2025 8:26 AM - Chris Lam-Vazquez
- Revised PO: Completed
- PO Distribution: Completed
- Export PO to CFS: Completed
- Completed: 9/11/2025 8:26 AM

# Purchase Order Change Requests

Search the PO that needs a change and create change request

CSUBUY

Purchase Order • Flooring by Fernando • 240004073T Revision 0

Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests	Receipts	Vouchers 1	Comments	Attachments	History																																																											
<div><table border="1"><tr><td><strong>General Information</strong></td><td><strong>Address Information</strong></td><td><strong>PO Information</strong></td></tr><tr><td><strong>Transaction Details</strong></td><td><strong>Ship To</strong></td><td>Accounting Date no value</td></tr><tr><td>Supplier Name  Flooring by Fernando</td><td>Attn: Chris Lam-Vazquez c/o Shipping and Receiving 25800 Carlos Bee Blvd</td><td>FY Processing Options no value</td></tr><tr><td>Purchase Order No. 240004073T</td><td colspan="3">Purchase Order Change Request</td></tr><tr><td>Purchase Order Date 9/11/2025</td><td colspan="3">United States</td></tr><tr><td>Revision No. 0</td><td><strong>Delivery To</strong></td><td>PO Type no value</td></tr><tr><td>Revision Date 9/11/2025</td><td>Deliver To Location ACCTSREC_EBCMP ACCOUNTS RECEIVABLE</td><td>Amount-Only / Blanket PO </td></tr><tr><td>Business Unit Vendor Id EBXMP-1004408172</td><td>Ship Via Best Carrier-Best Way</td><td>Multi-Year PO </td></tr><tr><td><strong>PO Owner Information</strong></td><td>Due Date no value</td><td>Terms/FOB Override Needed </td></tr><tr><td>Owner Name Chris Lam-Vazquez</td><td>F.O.B. FOB Destination</td><td>Payment Terms Net 30 ( 0% 0, Net 30 )</td></tr><tr><td>Owner Email chris.lam-vazquez@csueastbay.edu</td><td></td><td>Reference ID no value</td></tr><tr><td>Owner Business Unit EB: Cal State East Bay P2P (EBXMP)</td><td></td><td>Do Not Distribute </td></tr><tr><td>Owner Department no value</td><td><strong>Bill To</strong></td><td></td></tr><tr><td>Buyer 05000111749 Bhavesh Patel</td><td>Accounts Payable, CSU East Bay 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States</td><td></td></tr><tr><td><strong>Supplier Information</strong></td><td><strong>PO Terms &amp; Conditions</strong></td><td><strong>Notes &amp; Attachments</strong></td></tr><tr><td>Contract no value</td><td>Supplier Terms and Conditions no value <a href="#">add...</a></td><td>Internal Note no value</td></tr><tr><td>Supplier Account No. no value</td><td>Order acceptance instructions The Purchase Order number shall be referenced on all invoices and on the outside of all packages.... <a href="#">Show more</a></td><td>Internal Attachments <a href="#">Add</a></td></tr><tr><td>Quote number no value</td><td></td><td>Note to Supplier no value</td></tr><tr><td>Address 5151 State University Drive Chico, California 95926 United States</td><td>PO Clauses <a href="#">Add</a></td><td>Attachments for supplier <a href="#">Add</a></td></tr></table></div>											<strong>General Information</strong>	<strong>Address Information</strong>	<strong>PO Information</strong>	<strong>Transaction Details</strong>	<strong>Ship To</strong>	Accounting Date no value	Supplier Name  Flooring by Fernando	Attn: Chris Lam-Vazquez c/o Shipping and Receiving 25800 Carlos Bee Blvd	FY Processing Options no value	Purchase Order No. 240004073T	Purchase Order Change Request			Purchase Order Date 9/11/2025	United States			Revision No. 0	<strong>Delivery To</strong>	PO Type no value	Revision Date 9/11/2025	Deliver To Location ACCTSREC_EBCMP ACCOUNTS RECEIVABLE	Amount-Only / Blanket PO 	Business Unit Vendor Id EBXMP-1004408172	Ship Via Best Carrier-Best Way	Multi-Year PO 	<strong>PO Owner Information</strong>	Due Date no value	Terms/FOB Override Needed 	Owner Name Chris Lam-Vazquez	F.O.B. FOB Destination	Payment Terms Net 30 ( 0% 0, Net 30 )	Owner Email chris.lam-vazquez@csueastbay.edu		Reference ID no value	Owner Business Unit EB: Cal State East Bay P2P (EBXMP)		Do Not Distribute 	Owner Department no value	<strong>Bill To</strong>		Buyer 05000111749 Bhavesh Patel	Accounts Payable, CSU East Bay 25800 Carlos Bee Blvd Hayward, CA 94542-3000 United States		<strong>Supplier Information</strong>	<strong>PO Terms &amp; Conditions</strong>	<strong>Notes &amp; Attachments</strong>	Contract no value	Supplier Terms and Conditions no value <a href="#">add...</a>	Internal Note no value	Supplier Account No. no value	Order acceptance instructions The Purchase Order number shall be referenced on all invoices and on the outside of all packages.... <a href="#">Show more</a>	Internal Attachments <a href="#">Add</a>	Quote number no value		Note to Supplier no value	Address 5151 State University Drive Chico, California 95926 United States	PO Clauses <a href="#">Add</a>	Attachments for supplier <a href="#">Add</a>
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1 of 23 Results

- [Add Comment](#)
- [Create Change Request](#)
- [Add Notes to History](#)
- [Finalize Revision](#)
- [Create Receipt](#)
- [Create Credit Memo](#)
- [Create Voucher](#)
- [Print PO](#)
- [Soft Close PO](#)
- [Cancel/Close PO](#)

**Summary**

<strong>Completed</strong>
<strong>Details</strong>
<strong>Total (54,267.50 USD)</strong>
Shipping, Handling, and Tax charges are calculated and charged values shown here are for estimation purposes, budget charges
Subtotal
Sales Tax
Use Tax

54,267.50

**Related Documents**

- Requisition: 4356704
- Credit memo: C002925T

**What's next?**

Workflow Status Completed
Workflow
Submitted 9/11/2025 8:26 AM
Submitted 9/11/2025 8:26 AM · Chris Lam-Vazquez
Revise PO Completed
PO Distribution Completed
Export PO to CFS Completed
Completed

# Purchase Order Change Requests

**Create Change Request** X

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](#)

Bhavesh Patel (Approved Requisition) <bhavesh.patel@csueastbay.edu>

Chris Lam-Vazquez (Prepared by, Prepared for) <chris.lam-vazquez@csueastbay.edu>

User with change request permission:

Brian Odle (Approved) <Brian.odle@risenow.com>

Chris Lam-Vazquez (Prepared by, Prepared for) <chris.lam-vazquez@csueastbay.edu>

McKinley (Approved) <McKinley.kle@risenow.com>

Paige (Approved) <Paige.vin@risenow.com>

Thomas Miteni (Approved) <Thomas.miteni@risenow.com>

[add email recipient...](#)

Change Request Reason

**Must provide reason/justification**

1000 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

File Name

# Purchase Order Change Request

CSUBUY

Change Requests • 4362201

All | Search (Alt+Q) | 90,000.00 USD | 5

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

Changes will not be sent to the Supplier.

**Change Request Reason**

Reason Test

**General Information**

Transaction Details

Cart Name: 2025-09-11 05000010639 02 - CR

Business Unit: EB: Cal State East Bay P2P (EBXMP)

**Address Information**

Ship To:

Attn: Chris Lam-Vazquez  
c/o Shipping and Receiving  
25800 Carlos Bee Blvd  
Hayward, CA 94542-3000  
United States

PO Information

Accounting Date: no value

PO Type: no value

Amount-Only / Blanket PO:

Multi-Year PO:

Terms/FOB Override Needed:

**Deliver To**

Deliver To Location: ACCTSREC\_EBCMP  
ACCOUNTS RECEIVABLE

Reference ID: no value

Ship Via: Best Carrier-Best Way

Do Not Distribute:

Due Date: no value

**Bill To**

Accounts Payable, CSU East Bay  
25800 Carlos Bee Blvd  
Hayward, CA 94542-3000  
United States

**Chartfield**

Values vary by line.

**Other Participant Information**

Prepared by: Chris Lam-Vazquez

Prepared for: Chris Lam-Vazquez

**Internal Notes and Attachments**

Internal Note: no value

Internal Attachments: [Add](#)

**External Notes and Attachments**

Note to all Suppliers: no value

Attachments for all suppliers: [Add](#)

**Summary**

**Draft**

**Total (54,267.50 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	49,000.00
Sales Tax	5,267.50
Use Tax	0.00
<b>54,267.50</b>	

**Related Documents**

Purchase Order: 240004073T

Requisition: 4356704

**What's next for my order?**

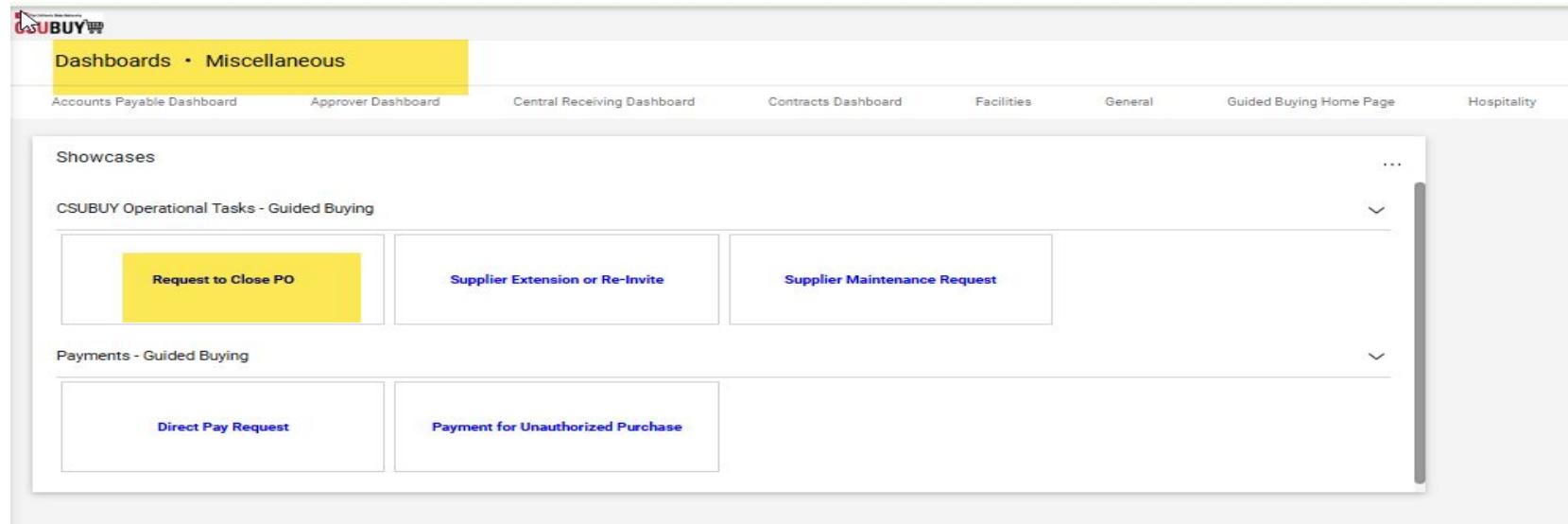
Next Step: Procurement Review

Approvers: Ballinger, Thomas Jr  
Lam-Vazquez, Chris

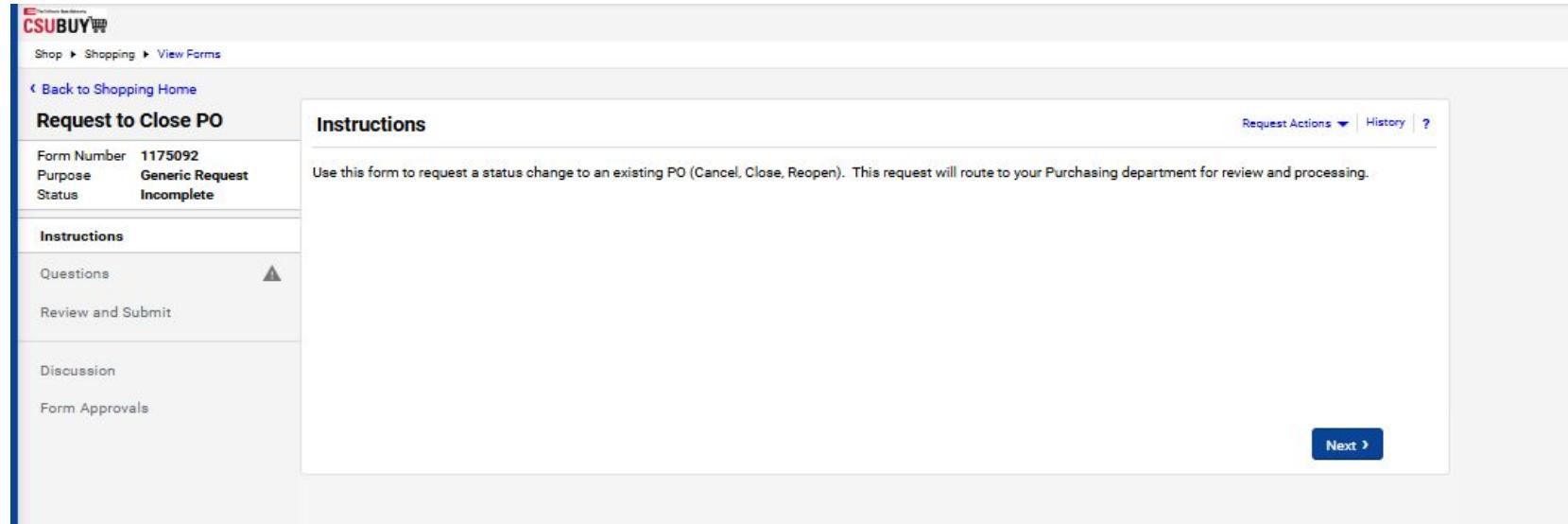
**Workflow**

- Draft** Active Chris Lam-Vazquez
- OFAC Check** Future
- Procurement Review** Future
- OFAC Check 2** Future
- PO Update** Future

# Close a Purchase Order



The screenshot shows the CSBUY Guided Buying Home Page. At the top, there is a navigation bar with links: Accounts Payable Dashboard, Approver Dashboard, Central Receiving Dashboard, Contracts Dashboard, Facilities, General, Guided Buying Home Page, and Hospitality. Below the navigation bar, there is a section titled "Showcases" with a sub-section titled "CSBUY Operational Tasks - Guided Buying". This section contains four buttons: "Request to Close PO" (highlighted with a yellow box), "Supplier Extension or Re-Invite", "Supplier Maintenance Request", "Direct Pay Request", and "Payment for Unauthorized Purchase".



The screenshot shows the "Request to Close PO" form page. At the top, there is a breadcrumb navigation: Shop > Shopping > View Forms. Below that, a link to "Back to Shopping Home". The main form area has a title "Request to Close PO" and a sub-section "Instructions". The "Instructions" section contains the following text: "Use this form to request a status change to an existing PO (Cancel, Close, Reopen). This request will route to your Purchasing department for review and processing." At the bottom right of the form area is a "Next >" button.

# Close a Purchase Order

Questions - Request Details

Request Actions ▾ | History | ?

★ Response Is Required

Request Details

Purchase Order Number \*

2024129875

Supplier Name \*

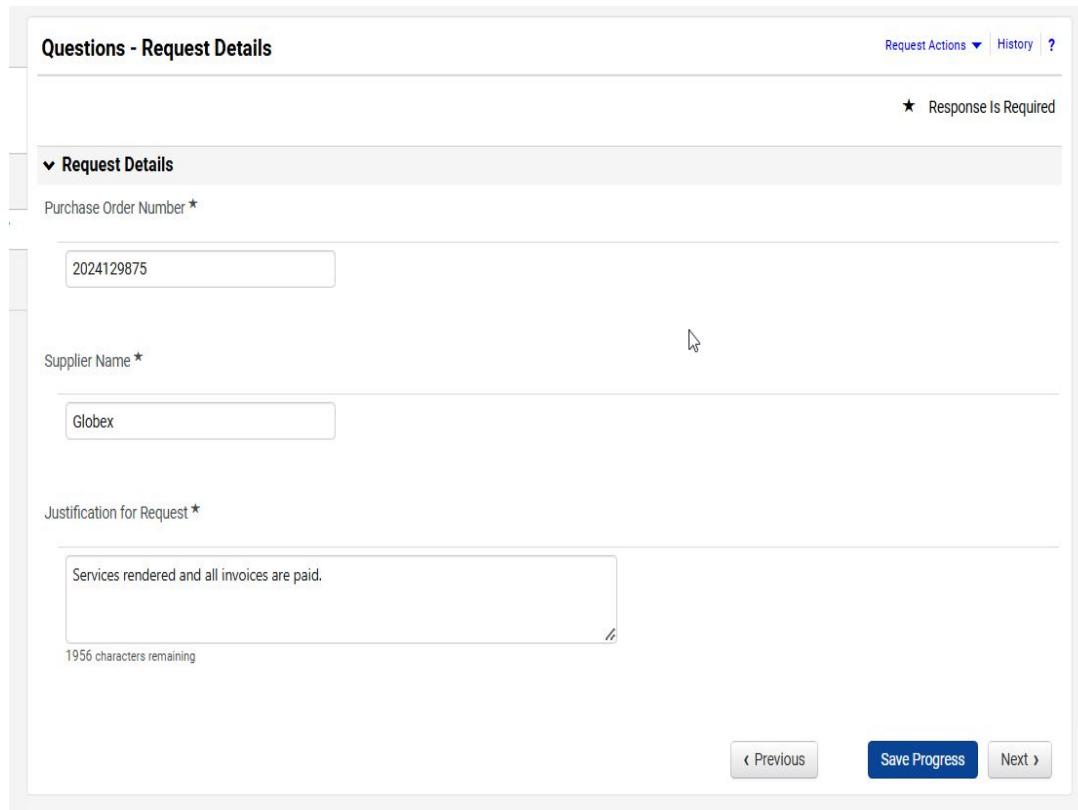
Globex

Justification for Request \*

Services rendered and all invoices are paid.

1956 characters remaining

Previous Save Progress Next



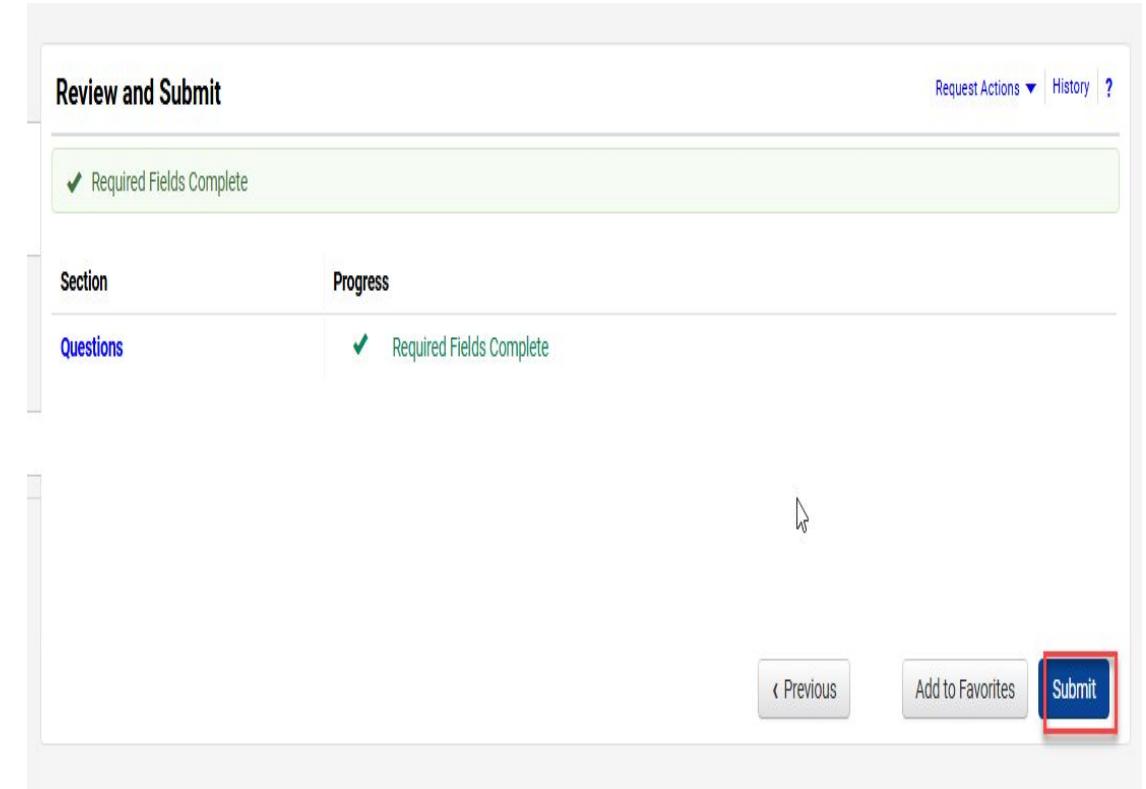
Review and Submit

Request Actions ▾ | History | ?

Required Fields Complete

Section	Progress
Questions	✓ Required Fields Complete

Previous Add to Favorites Submit



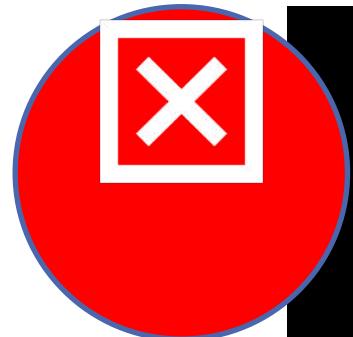
# Q&A

# Module 8 – Receiving



## Goods

- 3-Way
- Receipt Required



## Services or Blanket POs

- 2-Way
- No Receipt Required

# 3-Way Goods Receiving

Department to search  
the PO in P2P



Department to notify  
Receiving by using  
“Comment” tab. Add  
[bryan.hill@csueastbay.edu](mailto:bryan.hill@csueastbay.edu)  
as recipient

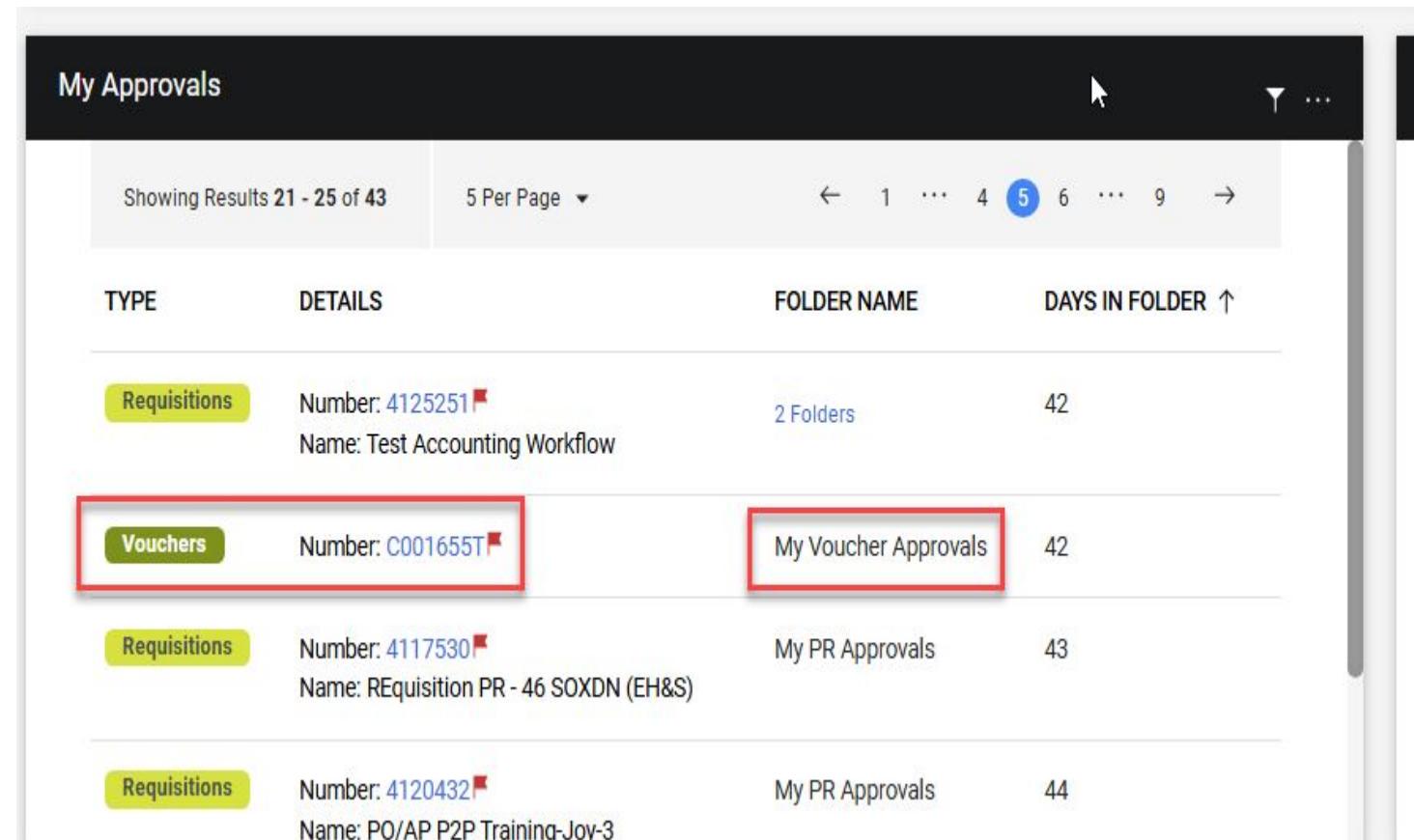


Receiving will create  
the receipt

Not required for purchase under \$500

# 2-Way Service Receipt

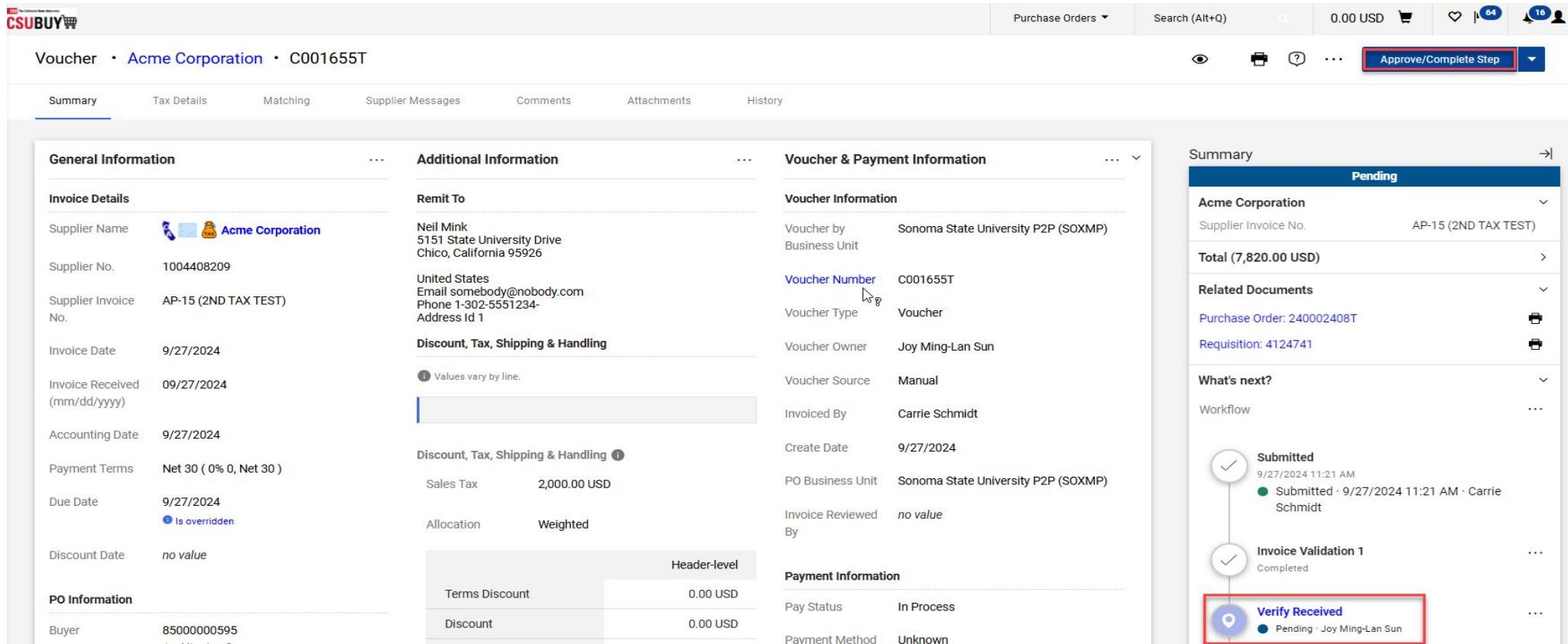
- ❖ Invoices will stop in workflow with the PO Owner.
- ❖ This person will have to approve before payment will move forward to Accounts Payable.
  - Service was complete
  - Service was satisfactory



TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER
Requisitions	Number: 4125251 	2 Folders	42
Vouchers	Number: C001655T 	My Voucher Approvals	42
Requisitions	Number: 4117530 	My PR Approvals	43
Requisitions	Number: 4120432 	My PR Approvals	44

# 2-Way Service Receipt

- ❖ PO Owner must open and review the invoice in the Attachment field.



The screenshot shows the CSUBUY software interface for a Voucher. The top navigation bar includes 'Purchase Orders', 'Search (Alt+Q)', '0.00 USD', and various user icons. The main content area is divided into three main sections: 'General Information', 'Additional Information', and 'Voucher & Payment Information'. The 'General Information' section contains details like Supplier Name (Acme Corporation), Supplier No. (1004408209), and Supplier Invoice No. (AP-15 (2ND TAX TEST)). The 'Additional Information' section includes Remit To details (Neil Mink, 5151 State University Drive, Chico, California 95926) and a 'Discount, Tax, Shipping & Handling' table. The 'Voucher & Payment Information' section shows the Voucher Number (C001655T), Voucher Type (Voucher), Voucher Owner (Joy Ming-Lan Sun), and Payment Terms (Net 30 (0%, Net 30)). The right side of the screen displays a 'Pending' status summary for the voucher, showing a workflow with 'Submitted' and 'Invoice Validation 1' steps, and a 'Verify Received' step which is currently pending. The 'Attachments' tab in the top navigation bar is highlighted with a red box.

# Q&A

# Module 9-Payment (Voucher)

- ❖ Invoice and Credit Memo Require PO
- ❖ Invoice Submission Options
- ❖ Voucher Process and Approval Workflow
- ❖ Payment Status

# Invoice and Credit Memo Require PO

- ❖ Voucher creation is done when the supplier invoice is submitted into workflow.

## Process Overview

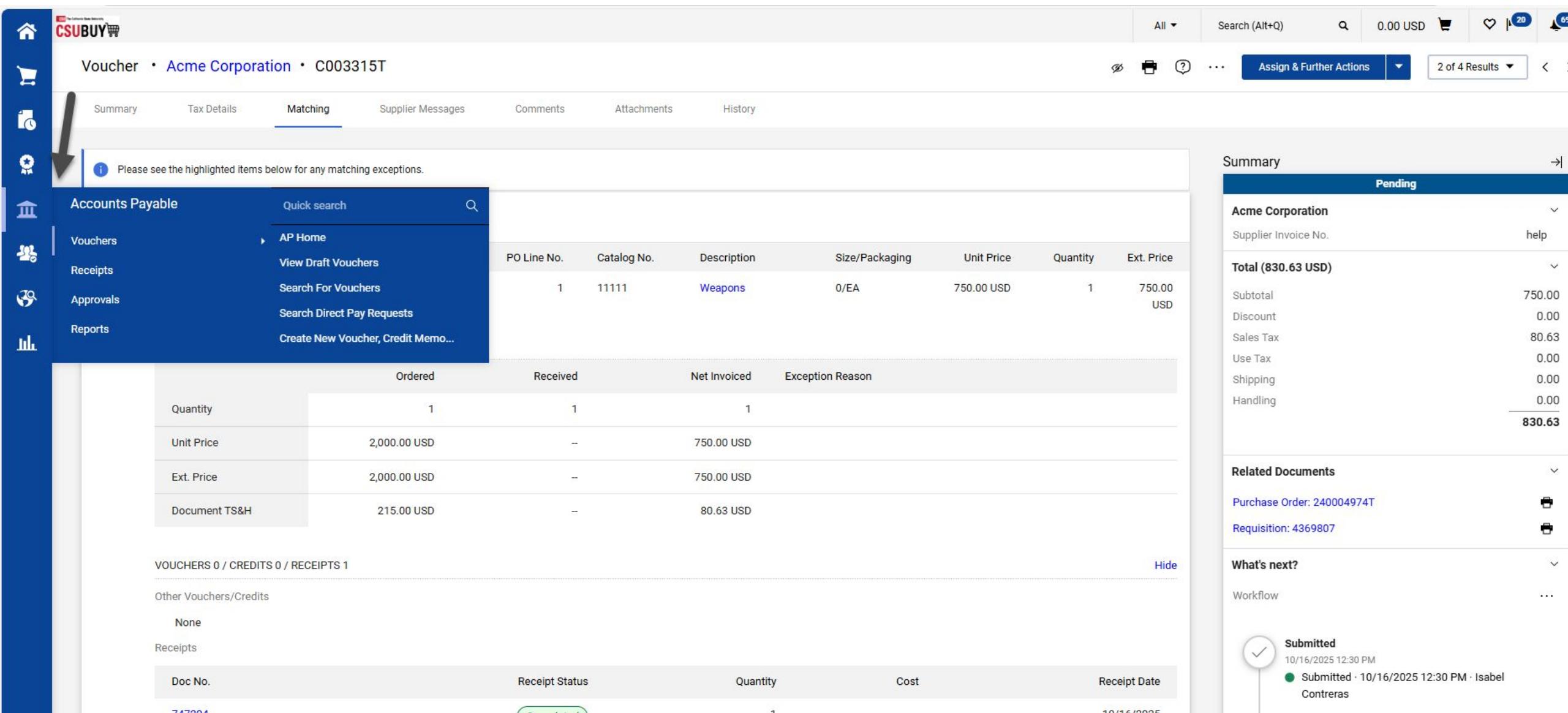
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# Submission Of Invoice

- Supplier uploads its invoice(s) directly through their online portal
- For invoices that are not able to be uploaded by the supplier directly, such as PG&E invoices, those invoices can be routed to [P2Pinvoice@csueastbay.edu](mailto:P2Pinvoice@csueastbay.edu) as a separate attachment and will be uploaded by the AP Technician that handles that account.

# Look up payment status in CSUBuy



The screenshot shows the CSUBuy Voucher page for Acme Corporation (C003315T). The Matching tab is selected. A modal window titled "Accounts Payable" is open, showing a list of matching items. The main page displays the Voucher details, including the PO Line No., Catalog No., Description, Size/Packaging, Unit Price, Quantity, and Ext. Price. The total amount is 830.63 USD. The page also includes sections for Related Documents and What's next?.

**Voucher • Acme Corporation • C003315T**

**Matching**

Please see the highlighted items below for any matching exceptions.

PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
1	11111	Weapons	0/EA	750.00 USD	1	750.00 USD

Ordered	Received	Net Invoiced	Exception Reason
Quantity	1	1	
Unit Price	2,000.00 USD	--	750.00 USD
Ext. Price	2,000.00 USD	--	750.00 USD
Document TS&H	215.00 USD	--	80.63 USD

VOUCHERS 0 / CREDITS 0 / RECEIPTS 1

Other Vouchers/Credits

None

Receipts

Doc No.	Receipt Status	Quantity	Cost	Receipt Date
747204				10/16/2025

**Summary**

**Pending**

**Acme Corporation**

Supplier Invoice No. help

**Total (830.63 USD)**

Subtotal	750.00
Discount	0.00
Sales Tax	80.63
Use Tax	0.00
Shipping	0.00
Handling	0.00
	<b>830.63</b>

**Related Documents**

Purchase Order: 240004974T

Requisition: 4369807

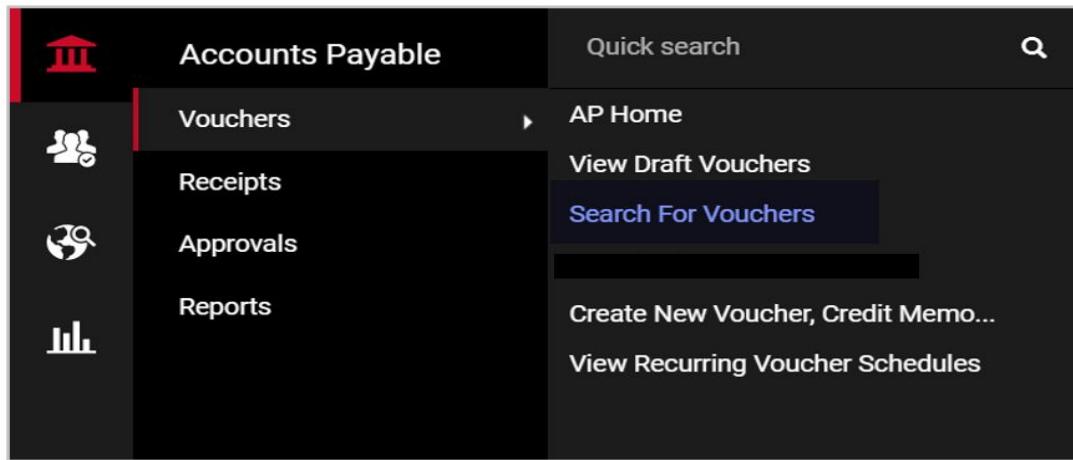
**What's next?**

Workflow

**Submitted**  
10/16/2025 12:30 PM

Submitted · 10/16/2025 12:30 PM · Isabel Contreras

# Voucher Process and Approval Workflow



## Vouchers

- Search for Vouchers

## Receipts

- View Match Status in Voucher

## Approvals

- View Vouchers Approval Workflow

## Payment Status

- Locate Payment Status

# Search for Vouchers

Capability to search invoice status through a variety of ways: Invoice #, Voucher #, Supplier Name, PO#

The screenshot shows the 'Vouchers' search interface in the CSUBUY system. The interface includes a sidebar with filters for Supplier, Voucher Status, Voucher Type, Voucher Source, and Business Unit. The main area shows a list of 280 results with columns for Voucher Number, Supplier Invoice Number(s), Supplier, PO Number, Voucher Status, Created Date/Time, Due Date, Discount Date, Discount Amount, Submitted Date, Voucher Source, Voucher Type, Pay Status, and Total Amount. A blue arrow points from the text 'Capability to search invoice status through a variety of ways' to the search bar at the top of the list.

1. Quick Filters

2. Search Date Range

3. Quick Search

4. Add Filters

5. Pin Filters

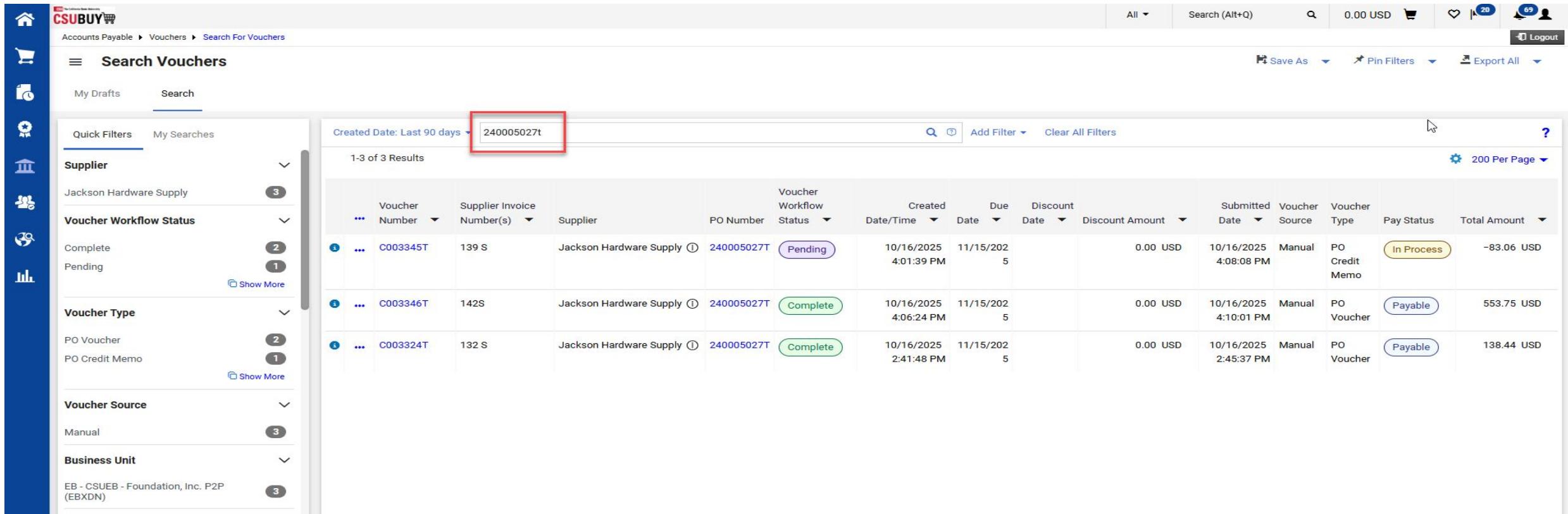
6. Save Search

7. Change View/Configure Column Display

8. Pay Status

1. Quick Filters
2. Search Date Range
3. Quick Search
4. Add Filters
5. Pin Filters
6. Save Search
7. Change View/Configure Column Display
8. Pay Status

# In the Quick Search, you can note the PO# to review the voucher



CSUBUY

Accounts Payable > Vouchers > Search For Vouchers

All | Search (Alt+Q) | 0.00 USD | Logout

Save As | Pin Filters | Export All

### Search Vouchers

My Drafts | Search

Quick Filters | My Searches

Supplier: Jackson Hardware Supply (3)

Voucher Workflow Status: Complete (2), Pending (1) | Show More

Voucher Type: PO Voucher (2), PO Credit Memo (1) | Show More

Voucher Source: Manual (3)

Business Unit: EB - CSUEB - Foundation, Inc. P2P (EBXDN) (3)

Created Date: Last 90 days | 240005027t

1-3 of 3 Results | Add Filter | Clear All Filters | 200 Per Page

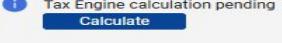
Voucher Number	Supplier Invoice Number(s)	Supplier	PO Number	Voucher Workflow Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status	Total Amount
C003345T	139 S	Jackson Hardware Supply	240005027T	Pending	10/16/2025 4:01:39 PM	11/15/2025 5		0.00 USD	10/16/2025 4:08:08 PM	Manual	PO Credit Memo	In Process	-83.06 USD
C003346T	142S	Jackson Hardware Supply	240005027T	Complete	10/16/2025 4:06:24 PM	11/15/2025 5		0.00 USD	10/16/2025 4:10:01 PM	Manual	PO Voucher	Payable	553.75 USD
C003324T	132 S	Jackson Hardware Supply	240005027T	Complete	10/16/2025 2:41:48 PM	11/15/2025 5		0.00 USD	10/16/2025 2:45:37 PM	Manual	PO Voucher	Payable	138.44 USD

- ❖ Once you identify the voucher, for more detail, click Voucher Number

# Voucher Details

Voucher • Edwin's Equipment New & Ref... • C002684T

53 of 76 Results

Summary	Matching	Supplier Messages	Comments 1	Attachments	History												
<div> <div> <p><b>General Information</b></p> <p><b>Invoice Details</b></p> <p>Supplier Name: <b>Edwin's Equipment New &amp; Refurbished</b></p> <p>Supplier No.: <b>1004408278</b></p> <p>Supplier Invoice No.: <b>test script3</b></p> <p>Invoice Date: <b>9/10/2025</b></p> <p>Accounting Date: <b>9/25/2025</b></p> <p>Payment Terms: <b>Net 30 ( 0% 0, Net 30 )</b></p> <p>Due Date: <b>10/10/2025</b></p> <p>Discount Date: <b>no value</b></p> <p><b>PO Information</b></p> <p>Buyer: <b>05000017768</b> Thomas Ballinger</p> <p>F.O.B.: <b>FOB Destination</b></p> <p>Multi-Year PO: <b>✗</b></p> <p>PO Type: <b>no value</b></p> <p>Reference ID: <b>no value</b></p> <p><b>Match Details</b></p> <p>Match Status: <b>Matched</b></p> </div> <div> <p><b>Additional Information</b></p> <p><b>Remit To</b></p> <p>Edwin Agricolae 5151 State University Drive Chico, California 95926</p> <p>United States Email: somebody@nobody.com Phone: 1-302-5551234- Address Id: 1</p> <p><b>Discount, Tax, Shipping &amp; Handling</b></p> <p> <b>Calculate</b></p> <p><b>Discount, Tax, Shipping &amp; Handling</b></p> <p>Sales Tax: <b>0.00 USD</b></p> <p>Allocation: <b>Weighted</b></p> <table border="1"> <thead> <tr> <th colspan="2">Header-level</th> </tr> </thead> <tbody> <tr> <td>Terms Discount</td> <td><b>0.00 USD</b></td> </tr> <tr> <td>Discount</td> <td><b>0.00 USD</b></td> </tr> <tr> <td>Use Tax</td> <td><b>0.00 USD</b></td> </tr> <tr> <td>Shipping</td> <td><b>0.00 USD</b></td> </tr> <tr> <td>Handling</td> <td><b>0.00 USD</b></td> </tr> </tbody> </table> <p>Total: <b>16,650.00 USD</b></p> </div> <div> <p><b>Voucher &amp; Payment Information</b></p> <p><b>Voucher Information</b></p> <p>Voucher by Business: <b>EB - Cal State East Bay P2P (EBXMP)</b></p> <p>Unit:</p> <p>Voucher Number: <b>C002684T</b></p> <p>Voucher Type: <b>Voucher</b></p> <p>Voucher Owner: <b>Chris Puente</b></p> <p>Voucher Source: <b>Manual</b></p> <p>Invoiced By: <b>Sonia Libiran</b></p> <p>Invoice Received (mm/dd/yyyy): <b>no value</b></p> <p>Create Date: <b>9/10/2025</b></p> <p>PO Business Unit: <b>EB - Cal State East Bay P2P (EBXMP)</b></p> <p>Invoice Reviewed By: <b>05000758883</b> Isabel Contreras</p> <p>Voucher Comment: <b>no value</b></p> <p><b>Payment Information</b></p> <p>Pay Status: <b>Paid</b></p> <p>Payment Method: <b>Check</b></p> <p>Payment Record No.: <b>1050181</b></p> </div> </div>						Header-level		Terms Discount	<b>0.00 USD</b>	Discount	<b>0.00 USD</b>	Use Tax	<b>0.00 USD</b>	Shipping	<b>0.00 USD</b>	Handling	<b>0.00 USD</b>
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<div> <p><b>Summary</b></p> <p>Handling: <b>16,650.00</b></p> <p><b>Related Documents</b></p> <p>Purchase Order: <b>240003647T</b></p> <p>Requisition: <b>4352813</b></p> <p><b>What's next?</b></p> <p><b>Workflow</b></p> <p>Submitted: 9/10/2025 2:47 PM · Sonia Libiran</p> <p>Verify Received: Approved · 9/10/2025 2:54 PM · Lana Lewis</p> <p>AP Review - E: Approved · 9/10/2025 2:55 PM · Sonia Libiran</p> <p>AP Manager Review: Approved · 9/10/2025 2:57 PM · Lana Lewis</p> <p>Secondary Signature Review: Approved · 9/10/2025 2:58 PM · Lana Lewis</p> <p>OK to Pay: Completed</p> </div>																	

- ❖ Summary
- ❖ Remit to Information
- ❖ Workflow Status
- ❖ Payment Status
- ❖ Matching Status
- ❖ Comments
- ❖ Attachments (including invoice)
- ...and much, much more

# View Match Status in Voucher

Voucher • Quality Classroom Supplies • C001660T

3-Way Example

Hold for Receiving:

- Unmatched
  - No Receipt has been entered
- Matched
- Matching Exceptions
  - Variety of reasons based on why it's a match exception

The screenshot shows the Voucher matching interface. At the top, it says 'Voucher • Quality Classroom Supplies • C001660T'. The 'Matching' tab is selected. Below it, there are two voucher lines. The first line is 'Unmatched' with '3 Way' matching method. It has a matching exception: 'No receipt has been entered'. The second line is also 'Unmatched' with '3 Way' matching method. The right side of the interface shows a summary table with totals and a detailed breakdown of costs. On the far right, there is a 'Summary' section and a 'Pending' status indicator. Below that, there is a 'Related Documents' section listing a purchase order and a requisition. At the bottom, there is a 'What's next?' section showing a workflow timeline with several steps: 'Submitted', 'Invoice Validation 1', 'Hold for Receiving' (which is highlighted with a yellow box), and 'AP Review'. The 'Hold for Receiving' step is currently 'Pending - Automated'.

# View Match Status in Voucher

Verify Received:

- ❖ Unmatched
- ❖ Matched
- ❖ Matching Exceptions

**2-Way Example**

Summary    Matching    Supplier Messages    Comments    Attachments    History

Please see the highlighted items below for any matching exceptions.

**240001935T**

Match Status	Matching Method	Voucher Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
Matched	2 Way PO/ Vouchers	1	1	AP-22 AND AP-30		0/EA	4,000.00 USD	1	4,000.00 USD

**MATCHING SUMMARY**

	Ordered	Received	Net Invoiced	Exception Reason
Quantity	1	-	1	
Unit Price	4,000.00 USD	-	4,000.00 USD	
Ext. Price	4,000.00 USD	-	4,000.00 USD	
Document DTS&H	0.00 USD	-	0.00 USD	

VOUCHERS 0 / CREDITS 0 / RECEIPTS 0

Summary    Complete

Megan's Marvelous Marketing

Supplier Invoice No. AP-22 AND AP-30

Total (4,000.00 USD)

Subtotal	4,000.00
Discount	0.00
Sales Tax	0.00
Use Tax	0.00
Shipping	0.00
Handling	0.00
	4,000.00

Related Documents

Purchase Order: 240001935T

Requisition: 4106241

What's next?

Workflow

Submitted 9/5/2024 2:24 PM  
Submitted - 9/5/2024 2:24 PM - Carrie Schmidt

Invoice Validation 1 Completed

Verify Received Approved - 9/18/2024 12:35 PM - Carrie Schmidt

AP Review Approved - 9/18/2024 12:43 PM - Carrie Schmidt

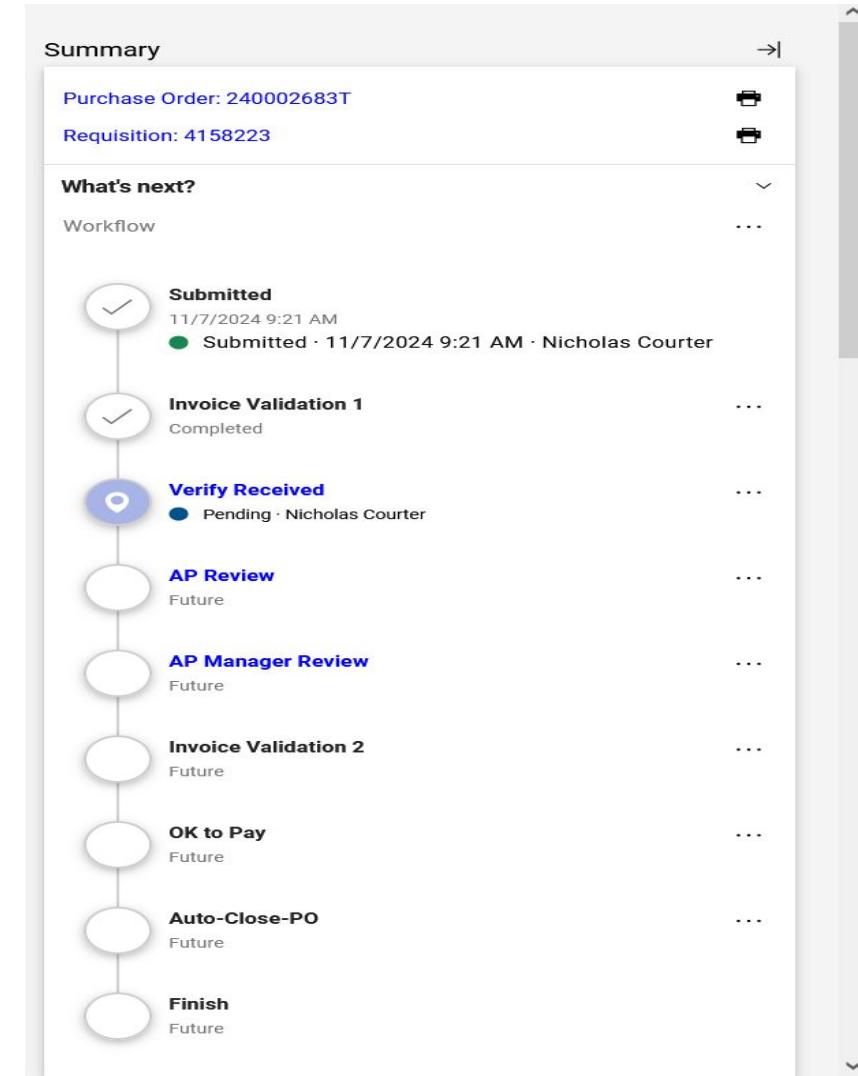
# View Voucher Approval Workflow

## Voucher Hold for Receiving

- ❖ 3-Way - Holds for 30 days, then goes to match exception, AP will reach out to the department for resolution before payment.
- ❖ 2-Way - A reminder is sent out to the requester for their approval before it moves forward for the AP Review

## AP Review

- ❖ Assigned to AP Team to review by alphabet
- ❖ AP Manager Reviews
  - ❖ AP Actions:
    - Approve
    - Return Voucher (internal comments)
    - Place Voucher on Hold (internal comments)
    - Forward (internal comment)
    - Reject Voucher (internal comments)



# Payment Status

Created Date: Last 90 days  🔍 ? Add Filter  ?

Accounting Date: 09/04/2025 - 0...

1-25 of 25 Results 100 Per Page

**Payment Details Viewable in Voucher**

Voucher Number	Supplier Number(s)	Supplier	PO Number	Voucher Workflow		Created Date/Time	Due Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status	Total Amount
				Status	Date/Time	Date	Date	Discount Amount	Date	Source	Type	Pay Status	Total Amount
... C003026T	test09252025	Flooring by Fernando ①	240004073T	Pending	9/25/2025 2:50:57 PM	10/25/2022 5		0.00 USD	9/25/2025 2:51:52 PM	Manual PO Voucher	In Process	49,000.00 USD	
... C003020T	13790	Quality Classroom Supplies ①	240004002T	Pending	9/25/2025 12:40:38 PM	10/1/2025		0.00 USD	9/25/2025 12:45:49 PM	Manual PO Voucher	In Process	667.82 USD	
... C003019T	testAC1	Acme Corporation ①	240004042T	Pending	9/25/2025 12:21:45 PM	10/25/2022 5		0.00 USD	9/25/2025 12:30:41 PM	Manual PO Voucher	In Process	110.75 USD	
... C003018T	test	Flooring by Fernando ①	240004073T	Pending	9/25/2025 12:13:28 PM	10/25/2022 5		0.00 USD	9/25/2025 12:14:15 PM	Manual PO Voucher	In Process	16,000.00 USD	
... C003012T	TESTSL	Amazon.com ①	240004519T	Complete	9/25/2025 10:47:46 AM	10/25/2022 5		0.00 USD	9/25/2025 10:59:23 AM	Manual PO Voucher	Payable	33.91 USD	
... C002925T	testcm	Flooring by Fernando ①	240004073T	Pending	9/18/2025 9:37:50 AM	10/15/2022 5		0.00 USD	9/18/2025 9:39:09 AM	Manual PO Credit Memo	In Process	-4,000.00 USD	
... C002753T	Draft 1	Globex Co. ①	240004045T	Pending	9/15/2025 11:22:57 AM	10/15/2022 5		0.00 USD	9/15/2025 11:48:46 AM	Manual PO Voucher	In Process	7,500.00 USD	
... C002741T	TEST141	BD Biosciences, Inc ①	240003471T	Complete	9/11/2025 10:50:17 AM	10/11/2022 5		0.00 USD	9/11/2025 10:52:49 AM	Manual PO Voucher	Paid	664.50 USD	
... C002740T	test138	Edwin's Equipment New & Refurbished ①	240003885T	Pending	9/11/2025 10:43:17 AM	10/11/2022 5		0.00 USD	9/11/2025 10:43:39 AM	Manual PO Voucher	In Process	18,800.00 USD	

**Payment Information**

Payment Method

Payment Record No.

Payment Record Date

Payment ID Ref

Voucher Payment Amount

Total Payment Amount

Payment Partially Paid

Cancellation Date

Escheatment Date

Reconciliation Date



# Payment Status

Created Date: Last 90 days		Flooring				Add Filter		Clear All Filters		?	
1-3 of 3 Results											
...	Business Unit	Supplier	Voucher Number	Supplier Invoice Number(s)	Total Amount	Matching Status	Pay Status	My Workflow Steps	My Approval Date/Time	Invoiced By	Payment ID Ref
...	Sonoma State University P2P	Flooring by Fernando	C001821T	1234	9,147.50 USD	Matched	In Process			Trudee Herman	
...	Associated Students of SSU P2P	Flooring by Fernando	C001772T	RETEST(SRVS)-ASIE2E2.8-E2E4.4	1,400.00 USD	Matched	Paid	AP Manager Review	10/18/2024 12:04:55 PM	Carrie Schmidt	118077
...	Associated Students of SSU P2P	Flooring by Fernando	C001771T	RETEST(C-ASI-E2E2.8-E2E4.4	1,292.95 USD	Matched	Paid	AP Manager Review	10/18/2024 12:05:03 PM	Carrie Schmidt	118077

- ❖ Payment ID Ref is the check/ACH number assigned to the voucher.
- ❖ This number is displayed after payment is issued.
- ❖ Suppliers receiving payment via check may receive a consolidated single check which includes multiple invoices.
- ❖ P2P functionality allows departments to search a variety of ways including: supplier name, invoice number, PO#.
- ❖ Once supplier located, departments can view all invoices associated with the check number.

# Q&A

**Thank You**

**&**

**Happy Shopping**

Office hours information are available at Procurement website.