CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

How to Enter a Purchase Requisition

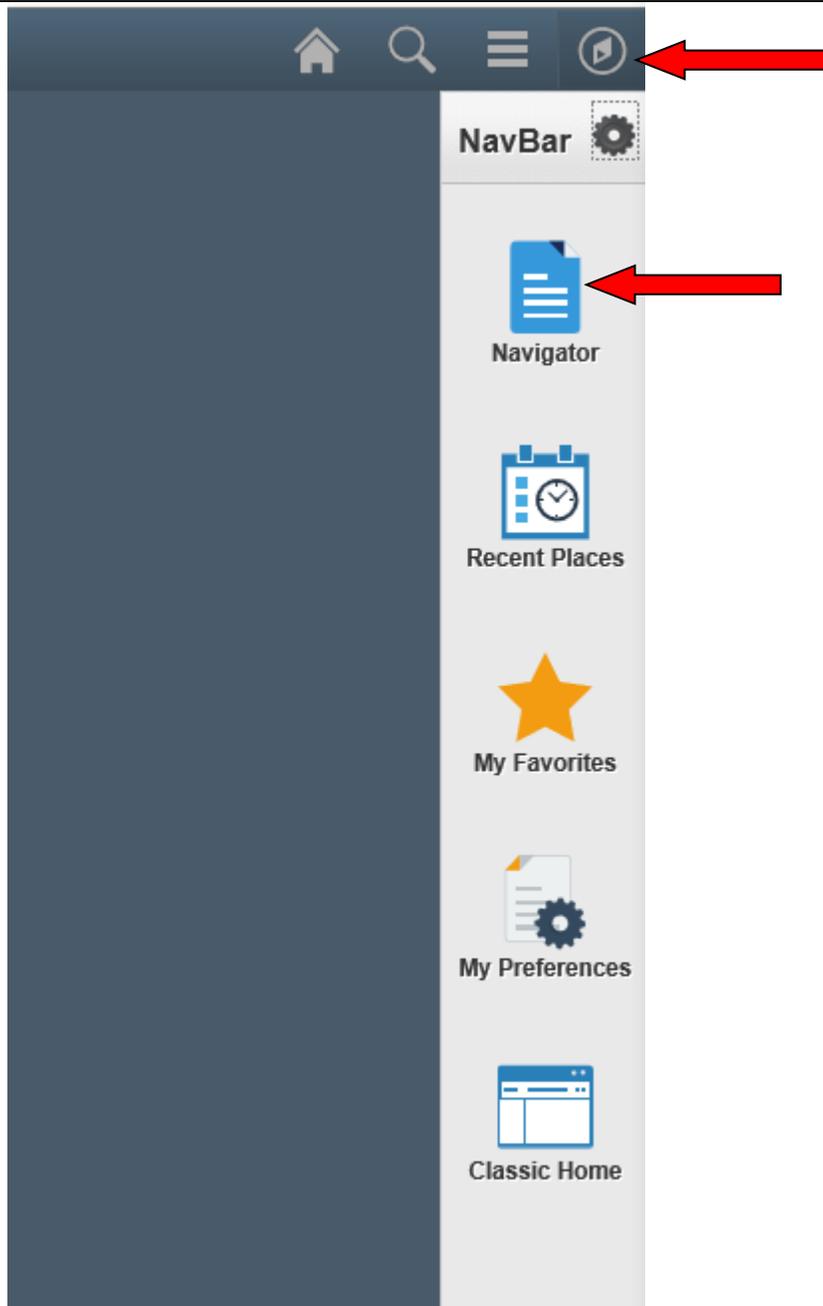|	
On the Cal Poly Portal click **CSU Portal-Financial Administration** Continue with your 2-Step Verification sign-in process. **Pro Tip:** Chrome is the recommended web browser for optimal system function. **Pro Tip:** Do not use the "Back" or "Forward" buttons in your web browser. Navigate within the system by using system buttons, hyperlinks, and/or NavBar icons and lists.	**CAL POLY** | My Portal Home Money Matters Personal Info Library Staff ar My Apps Cal Poly Canvas Email & Calendar Cal Poly OneDrive HR Administration Student Administration CSU Portal- Financial Administration ← PolyData Dashboards Campus Wiki Electronic Workflow Technical Service Request Facilities Requests CSYou Portal **Directory Information** Search this directory for Cal Poly student, faculty, and s **Simple Search** Switch to Advanced Search Category All **Single Click Access** Cal Poly Canvas Email & Calendar Cal Poly OneDrive HR Administration

Once in the CFS system, first click on the diamond in a circle icon at the top right of the homepage, then follow this path on the NavBar:

Navigator

Purchasing	

Requisitions	
	NavBar: Navigator
	Navigator
	Recent Places
	My Favorites
	Purchasing
	Requisitions
	Request for Quotes
	Purchase Orders
	Receipts
	Return To Vendor / Supplier

Add/Update Requisitions

This is the **Add/Update Requisitions** page. **Pro Tip:** To find this page easily next time, use this menu ⋮ found at the top right of this screen and choose **Add to Homepage** or **Add to Favorites**. On the **Add a New Value** tab click on **Add** (Do Not change the Business Unit or Requisition ID fields)	**CSU** The California State University COMMON FINANCIAL SYSTEM < Michele's Homepage Requisitions **Requisitions** [Find an Existing Value] [**Add a New Value**] Business Unit SLCMP 🔍 Requisition ID NEXT [Add] ⬅ Find an Existing Value	Add a New Value
Click **OK** through this message	Default comment added for Ship To Code 0820. Verify on Ship to comments page. (10100,142) The comment defaulted can be found in the Ship To Comments secondary page. To review the comments, select the Ship To Comments hyperlink found under the Schedule page. [OK]

This is the main requisition page.

Pro Tip:
Click on this icon and **Personalize** to show only what you need to see here. On the pop-up **Grid Customization** screen, click on **Item** and check the **Hidden** box in the divider. The **Item field** is not used, so it is best to hide it. **You will only have to Personalize once.** Scroll down and click **OK**.

Back on the main requisition page click the **Requisition Defaults** hyperlink to begin entering the required information.

Maintain Requisitions
Requisition

Business Unit	SLCMP	Status	Open
Requisition ID	NEXT	Budget Status	Not Chk'd

Requisition Name [   ] Copy From ☐ Hold From Further Processing

▼ Header ⑦

*Requester [15010982071] 🔍 Winterfeldt,Michele L
*Requisition Date [07/22/2022] 📅 Requester Info
Origin [ONL] 🔍 Online Entry
*Currency Code [USD] Dollar
Accounting Date [07/22/2022] 📅

Amount Summary ⑦
Total Amount   0.00   USD

Requisition Defaults
Requisition Activities   Add Comments

Add Items From ⑦
~~rchasing Kit~~   Catalog
~~arch~~   Requester Items

Line ⑦

Pro Tip

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | ‖▶ |

Grid Customization

Help

Line

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order
Tab Details (frozen)
Line (frozen)
Details (frozen)
Item (hidden)
Description
Item Search
Quantity
*UOM
Category
Price
Merchandise Amount
Status
Line Comments
Defaults...
Schedule...
Tab Ship To/Due Date
Due Date
Ship To
Price

Sort Order

☑ Hidden
☐ Frozen

☐ Descending

Pro Tip

▼ Header ⑦

*Requester [15010982071] 🔍 Winterfeldt,Michele L
*Requisition Date [07/22/2022] 📅 Requester Info
Origin [ONL] 🔍 Online Entry
*Currency Code [USD] Dollar
Accounting Date [07/22/2022] 📅

Requisition Defaults   Add Comments
Requisition Activities

7

Complete the highlighted fields using the magnifying glasses and the pop-up screens.

Pro Tips:

1. Your Buyer (Procurement Specialist) is easily found by typing **15** in the **Buyer begins with** field and then clicking **Look Up.**

2. When in doubt choose **No Vendor** in the **Supplier** field (it is the first one listed).

3. In the **Category** search, services begin with a 9 and all other numbers (1-8) designate a physical item.

4. Only enter a **Due Date** if a certain date is important.

Once this page is completed click **OK**.

Requisition Defaults

Important! Change from Default to Override here

Business Unit   SLCMP   Requisition Date   07/22/2022
Requisition ID   NEXT   Status   Open

Default Options ⓘ
○ Default   If you select ... applied if no ... and the valu... page are treated as part of the defaulting logic and are only ... If default values already exist in the hierarchy, they are used,

◉ Override   If you select ... only non-bla... page override the default values found in the default hierarchy

Enter your assigned Procurement Specialist here for fastest processing by the correct person.

Common Units of Measure are **LOT** or **EA**

Line
Buyer _____ 🔍   Unit of Measure _____ 🔍
Supplier _____ 🔍   Supplier Location _____ 🔍
Category _____ 🔍   Supplier Lookup

Enter no more than **four** letters or characters when searching for a Supplier

Schedule
Ship To 0820 🔍 Distributio...   *Distribute By Quantity
Due Date _____ 📅   *Liquidate By Amount
Ultimate Use Code _____ 🔍   Ship Via UPSGROUND 🔍
Attention To _____   Freight Terms DA 🔍

Distribution
SpeedCha...

You can click on this icon to Personalize and reorder the fields to match the ones below. You'll only have to do this once. In the pop-up screen select Fund, Dept, etc. on the left side and use the up and down arrows to rearrange their order, then click OK.

Distributions
🔢 🔍

Details   Asset Information   ‖▶

Dist	Percent	GL Unit	Fund	Dept	Account	Program	Project	Class	Oper Unit
1		SLCMP 🔍	🔍	🔍	🔍	🔍	🔍	🔍	🔍

OK   Cancel   Refresh

You MUST enter a Fund and Dept here. Account is optional and will default to 660003.
If your funding source has an optional Program, Project or Class number, enter them here.

Note: These requisition defaults will be applied to all lines you enter on the requisition

You will be back on the main requisition page.

After populating the fields highlighted in red, click **Refresh**. This will auto-populate the remaining fields.

Maintain Requisitions

Requisition

Business Unit SLCMP
Requisition ID NEXT
Requisition Name _____ Copy From

Status Open
Budget Status Not Chk'd

☐ Hold From Further Processing

▽ Header ?

*Requester 15006137231 Paolucci,Jeanette
*Requisition Date 03/30/2016 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ?
Total Amount   0.00 USD

Add Items From ?

> Enter a short description of what is being purchased here

Catalog
Requester Items

> Press Enter on your keyboard after filling in the Price

Line ?   Personalize | Find | View All | First 1 of 1 Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

View Printable Version   *Go to ...More...

Save   Notify   Refresh ◀   Add

This is the minimum amount of information to click **Save** and obtain a **Requistion number.**

Pro Tip:
The system times out often so it is important to save at this point.

Maintain Requisitions

Requisition

Business Unit SLCMP
Requisition ID NEXT
Requisition Name _____ Copy From

> The word NEXT will be replaced with the requisition number. Requisition numbers begin with the number 1. For example - 1000025555. Please make note of your requisition number.

Open
Not Chk'd

☐ Hold From Further Processing

▽ Header ?

*Requester 15006137231 Paolucci,Jeanette
*Requisition Date 03/30/2016 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ?
Total Amount   0.00 USD

Add Items From ?

Purchasing Kit   Catalog
Item Search   Requester Items

Line ?   Personalize | Find | View All | First 1 of 1 Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

View Printable Version   *Go to ...More...

Save   Notify   Refresh   Add

You can add more lines to the requisiton by selecting the + at the far right side.

Maintain Requisitions

Requisition

Business Unit SLCMP
Requisition ID NEXT

Status Open
Budget Status Not Chk'd

Requisition Name _____ Copy From

☐ Hold From Further Processing

▽ Header ⑦

*Requester 15006137231 🔍 Paolucci,Jeanette
*Requisition Date 03/30/2016 📅 Requester Info
Origin ONL 🔍 Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016 📅

Requisition Defaults   Add Comments   Amount Summary ⑦
Requisition Activities   Total Amount   0.00 USD

Add Items From ⑦
Purchasing Kit   Catalog
Item Search   Requester Items

Line ⑦   Personalize | Find | View All | 🖽 | 🏢   First ◀ 1 of 1 ▶ Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	···

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1 📇	_____ 🗗	🔍 0.0000	___ 🔍	___ 🔍	0	0.00	Open	🗨 📖 📷 ⊞ ⊟

View Printable Version   *Go to ...More... ▾

💾 Save   📧 Notify   🔄 Refresh   📑 Add   📝

In the pop-up screen enter in the number of lines you would like to add then click **OK**.

Pro Tip:
Use a minimal number of lines, but enough to be clear and also reflect the vendor's quote. Use separate lines for unique types of items such as **goods** vs. **services** vs. **shipping**.

cfs.calstate.edu says

Enter number of rows to add:

1

OK   Cancel

You do not need to add a line for sales tax.
Sales tax will be reviewed and assigned by your Procurement Specialist to applicable lines.

The lines will be added. Continue populating the required fields and clicking **Refresh** to auto-populate the remaining fields.

When finished adding lines, click **Save**.

Add Items From ?

| Purchasing Kit | Catalog |
| Item Search | Requester Items |

Line ?   Personalize | Find | View All | | First ◄ 1-2 of 2 ► Last

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1		0.0000			0	0.00	Open					
2		0.0000			0	0.00	Open					

/iew Printable Version   *Go to ...More... ▼

[Save] [Notify] [Refresh]   [Add] [Update/Display]

For a line with a different category type than you entered in Requisition Defaults (e.g., a line for services or freight instead of goods), change the category number on that specific line at this time.

Click on the **Add Comments** hyperlink to attach backup paperwork.

Pro Tips:
1. Backup paperwork includes items such as: the vendor's quote, other quotes you received for comparison, an approved building permit, or new vendor form/W-9.

2. Do <u>not</u> use line comments.

Maintain Requisitions

Requisition

Business Unit	SLCMP		Status	Open
Requisition ID	NEXT		Budget Status	Not Chk'd
Requisition Name		Copy From		

☐ Hold From Further Processing

▽ Header ?

*Requester	15006137231		Paolucci,Jeanette
*Requisition Date	03/30/2016		Requester Info
Origin	ONL		Online Entry
*Currency Code	USD		Dollar
Accounting Date	03/30/2016		

Requisition Defaults   [Add Comments]   Amount Summary ?

Requisition Activities   Total Amount   0.00 USD

Add Items From ?

| Purchasing Kit | Catalog |
| Item Search | Requester Items |

Line ?   Personalize | Find | View All | | First ◄ 1 of 1 ► Last

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		0.0000			0	0.00	Open				

View Printable Version   *Go to ...More... ▼

[Save] [Notify] [Refresh]   [Add]

Use the blank space to type anything you would like your Procurement Specialist to know about your purchase.

Pro Tips:
1. This is a great location for the vendor contact name, email address and phone number.

2. It is not necessary to select the Send/Show checkboxes.

Click **Attach** to add your backup.

Header Comments

Business Unit SLCMP
Requisition ID NEXT

Requisition Date 03/30/2016
Status Open

*Sort Method Comment Time Stamp ▼
*Sort Sequence Ascending ▼
Sort

Comments   Find | View All   First ◄ 1 of 1 ► Last
Use Standard Comments   Comment Status Active   Inactivate   ＋

☐ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment   Attach   View   Delete   ☐ Email

From -> REQ SLCMP-NEXT

OK   Cancel   Refresh

Click **Browse** first to find your file and once the file is selected, click **Upload.**

Find | View All   First ◄ 1 of 1 ► Last

File Attachment

Help

Upload   Cancel   Browse...

12

Header Comments

Business Unit SLCMP	**Requisition Date** 03/30/2016
Requisition ID NEXT	**Status** Open

If you have another file to attach Click the + at the right side to add another comment box.

Pro Tip:
If **View All** displays as a hyperlink, there is more than one comment box. Click the **View All** hyperlink to show all boxes.

*Sort Method Comment Time Stamp

*Sort Sequence Ascending

Sort

Comments

Find | View All   First ◀ 1 of 1 ▶ Last

Use Standard Comments

Comment Status Active   Inactivate   ✚

☐ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment   Attach   View   Delete   ☐ Email

From -> REQ SLCMP-NEXT

OK   Cancel   Refresh

If you are finished attaching all backup documentation, click **OK**.

You will now be back on the main requisition page. Click **Save**.

Your requisiton is complete.

Pro Tip:
If you need to update something specific later in the requisition, select the **Hold From Further Processing** checkbox. If you do, the requisition will <u>not</u> be made available to your approving official and you will be able to come back and make the update. Once you are finished with the update, unselect **Hold From Further Processing** and click **Save**. The requisition will now be available to your approving official.

Maintain Requisitions

Requisition

Business Unit	SLCMP	Status	Open
Requisition ID	NEXT	Budget Status	Not Ch'k'd
Requisition Name		Copy From	

☐ Hold From Further Processing

▽ Header ?

*Requester 15006137231   Paolucci,Jeanette
*Requisition Date 03/30/2016   Requester Info
Origin ONL   Online Entry
*Currency Code USD   Dollar
Accounting Date 03/30/2016

Requisition Defaults   Add Comments   Amount Summary ?
Requisition Activities   Total Amount   0.00 USD

Add Items From ?

    Purchasing Kit   Catalog
    Item Search   Requester Items

Line ?   Personalize | Find | View All | | First ◄ 1 of 1 ► Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls

Line▲	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1		0.0000			0	0.00	Open	☐	📖	🗓	＋	－

View Printable Version   *Go to ...More...   ▼

Save   Notify   Refresh   Add

Communicate the requisition number to your approving official with your approval request. They will not receive any automatic notifications.

Your approving official must **approve** and **budget check** the requisition before your Procurement Specialist can see it in their workflow.

If you do not know who your approving official is call Valerie Maijala at 6-1187.

Please allow 10 business days for processing.

Call your assigned Procurement Specialist or 6-2232 with any questions.

Status   Approved

Budget Status   Valid

☐ Hold Fro

> When the requisition is fully approved the Status will show as **Approved** and the Budget Status as **Valid**.

Status   Open

Budget Status   Not Chk'd

☐ Hold From Further Processing

> If the requisition shows Status **Open** and/or Budget Status **Not Chk'd**, it is not fully approved by the approving official.

*Requester   15010982071   🔍   Winterfeldt,Michele L

*Requisition Date   07/22/2022   📅   Requester Info

Origin   ONL   🔍   Online Entry

*Currency Code   USD   Dollar

Accounting Date   07/22/2022   📅

Requisition Defaults   Add Comments

Requisition Activities

> If you or your approving official receive an error message when accessing a requisition, you might need to update the Accounting Date on the main page before proceeding. The Accounting Date must always be a date within the current month.

Bonus Pro Tips:

1. Requisition numbers start with a 1, and Purchase Order numbers start with a 2.

2. Once a requisition is saved, you can search for it from the **Add/Update Requisitions** page on the **Find an Existing Value** tab. Search by **Requester Name** (last name), or by **Requisition ID**. To avoid typing all of the digits of the requisition number in the **Requisition ID** field, type a **%** and only the **last 5 digits** of the requisition number. Note: This is also where your approving official will search to approve the requisition.

Requisition ID
1000021671

PO ID
2000024231

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value	Add a New Value

▼ Search Criteria

Business Unit	= ⌄	SLCMP 🔍
Requisition ID	begins with ⌄	%21606
Requisition Name	begins with ⌄	
Requisition Status	= ⌄	⌄
Origin	begins with ⌄	🔍
Requester	begins with ⌄	🔍
Requester Name	begins with ⌄	🔍

Hold From Further Processing ☐

☐ Case Sensitive

Search   Clear   Basic Search 🔲 Save Search Criteria

Once you have searched for a requisition, click anywhere along the blue hyperlinked text in the Search Results line to view the requisition.	**Requisition ID** begins with ∨ %21606 **Requisition Name** begins with ∨ **Requisition Status** = ∨ **Origin** begins with ∨ 🔍 **Requester** begins with ∨ 🔍 **Requester Name** begins with ∨ 🔍 **Hold From Further Processing** ☐ ☐ Case Sensitive [Search] [Clear] Basic Search 📇 Save Search Criteria Search Results View All ◁ ◀ 1-1 of 1 ∨ ▶ ▷ | Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
---	---	---	---	---	---	---	---
SLCMP	1000021606	1000021606	Approved	ONL	15017354085	Chionuma,Makenzie	N	
Click **OK** through this message, if it pops up.	Message Default comment added for Ship To Code 0820. Verify on Ship to comments page. (10100,142) The comment defaulted can be found in the Ship To Comments secondary page. To review the comments, click on the Ship To Comments hyperlink found under the Schedule page. [OK]

3. You can also search for any requisition in **Requisition Inquiry** using this path on the NavBar: **Purchasing -> Requisitions -> Review Requisition Information-> Requisitions.** Once your approving official views/approves your requisition, this will be the only place for you to view it.

Searchable fields include: **Requisition ID**, **Requester Name**, or **Supplier Name**.

Please note, this is <u>not</u> where your approving official approves your requisition. It is for inquiries only and contains limited information.

ORACLE

Requisition Inquiry

Business Unit SLCMP

Requisition ID   To Req

Requisition Name

Req Status   Origin

Requester

Requester Name

Requisition Date   To

Supplier SetID SLCMP   Supplier Lookup

Supplier ID   Supplier Details   Supplier Name

Item SetID SLCMP   Item ID

Item Description
254 characters remaining   ☐ Direct Ship

Department

OK   Cancel

4. To cancel a requisition, click on the red X in the upper right-hand corner of the main requisition page. Click **Yes** at the pop-up message.

Note: You may not be able cancel a requisition if your approving official has already accessed or approved the requisition. They may be able to cancel it using these instructions. If your approving official is also unable to cancel the requisition, your assigned Procurement Specialist has pulled the requisition over for processing. Contact your Procurement Specialist to cancel the requisition.

Maintain Requisitions

Requisition

Business Unit SLCMP

Requisition ID 1000013851

Requisition Name 1000013851

Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

▼ Header ?

*Requester 15010982071   Winterfeldt,Michele L

*Requisition Date 05/14/2018   Requester Info

Origin ONL   Online Entry

*Currency Code USD   Dollar

Accounting Date 05/14/2018

Requisition Defaults

Requisition Activities

Document Status

Add Comments

Amount Summary ?

Total Amount   50.00 USD

Add Items From ?

Purchasing Kit   Catalog

Item Search   Requester Items

Select Lines To Display ?

Search for Lines

Line ___   To ___   Retrieve

Line ?

Personalize | Find | View All | |

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | |

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	TEST	1.0000	LOT	96200	50.00000	50.00	Open

View Printable Version   Delete Requisition   *Go to ...More...

Save   Return to Search   Notify   Refresh

Message

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

Yes   No

5. To update the chartfield on a specific requisition line, click the **Schedule** icon on the main requisition page for the line you want to update.

On the **Schedule** page click the **Distribution** icon.

Make any desired updates to the chartfield on the **Distributions** screen. This only affects the chartfield for the selected line.

Requisition

Business Unit	SLCMP
Requisition ID	1000021606
Requisition Name	1000021606

Status Approved
Budget Status Valid

☐ Hold From Further Processing

▼ Header ⑦

*Requester 15017354085 Chionuma,Makenzie
*Requisition Date 06/24/2022 Requester Info
Origin ONL Online Entry
Currency Code USD Dollar
Accounting Date 06/24/2022

Amount Summary ⑦

Total Amount 7,322.40 USD
Pre-Encumbrance Balance 0.00 USD

Requisition Defaults
Requisition Activities
Document Status

Edit Comments

Add Items From ⑦

Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display ⑦

Search for Lines
Line [ ] To [ ] Retrieve

Line ⑦

1-2 of 2

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line	Description	Category	Quantity	*UOM	Price	Merchandise Amount	Due Date	Status
1	Wilson Classic Game FB -Custom Logo	57800	60.0000	LOT	115.99000	6,959.40	06/30/2022	Approved

Schedule

1-1 of

| Details | |

Sched		*Ship To		Quantity	Price	Merchandise Amount	Due Date	Attention To		Status	
1		0820		60.0000	115.99000	6,959.40	06/30/2022	Chionuma,Make		Active	Δ

Add/Edit Comments

[Save] [Return to Search] [Notify] [Refresh]

Use this icon to Personalize on this page to rearrange the order of the fields here. You'll only need to do this once.

Distributions

| Chartfields | Details | Asset Information | Budget Information |

	Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Fund	Dept	Account	Program
	1	Open	100.0000	1.0000	39,000.00	SLCMP	MO007	120107	613001	

[OK] [Cancel] [Refresh]

6. To split a line amount to two or more chartfields, first navigate to its **Distributions** (see previous page).

On the **Distributions** page, use the + at the far right of the screen to add one or more rows at the prompt. Then add the other chartfield(s) you would like to use, and specify the Percent.

If you would like to split by dollar amount rather than a percentage, click on the **Distribute By** drop down. Change from **Quantity** to **Amount**. Adjust the **Merchandise Amount** fields to reflect the desired split.

Personalize | Find | View All | ⧉ | 🖩   First ◀ 1 of 1 ▶ Last

Oper Unit	Product	Affiliate	Fund Affiliate	Oper Unit Affil	Bud Ref	

calstate.edu needs some information   ✕

Script Prompt:
Enter number of rows to add:

[OK]
[Cancel]

1

Line 1   Status Active
Schedule 1

Ship To 0820   Dist Svcs   Quantity   1.0000 LOT
*Distribute By Quantity   Open Quantity   1.0000
*Liquidate By Amount   Merchandise Amt 5,000.00 USD
SpeedChart [   ] 🔍 Multi-SpeedCharts

Distributions

| Chartfields | Details | Asset Information | Budget Information | |

For example, split by assigning 50% to one chartfield and 50% to another

Distrib Status	Percent	Quantity	Merchandise Amount				
1 Open	100.0000	1.0000	5,000.00	SLCMF 🔍	🔍	🔍	660003
2 Open		0.0000	0.00	SLCMF 🔍	🔍	🔍	

[OK] [Cancel] [Refresh]

Note: If you are kicked out of this screen while making these changes, just go back in again through the Distribution icon to finish.

Distribution

Requisition ID NEXT   Item   test
Line 1   Status Active
Schedule 1

Ship To 0820   Dist Svcs   Quantity   1.0000 LOT
*Distribute By Amount   Open Amount   5,000.000
*Liquidate By Amount
SpeedChart [   ] 🔍 Multi-SpeedCharts

For example, split by assigning $4,000 to one chartfield and $1,000 to another

Distributions

| Chartfields | Details | Asset Information | Budget Information | |

Distrib Status	Percent	Merchandise Amount	GL Unit	Fund	Dept	Account	Progr
1 Open	100.0000	5,000.00	SLCMF 🔍	🔍	🔍	660003 🔍	
2 Open		0.00	SLCMF 🔍	🔍	🔍	🔍	

[OK] [Cancel] [Refresh]