

Quick Reference Guide

Add a New Line to Change Request



A new "Add to Draft Change Request" action allows users to add a line item to a change requests, with the exception of punch out items.

IMPACTED USER GROUPS:

- Shoppers (PO Owner)
- Requesters (PO Owner)
- Buyers
- Accounts Payable

Note: For Shoppers & Requesters, only a PO owner can create a change request. Others can only create a change request comment.

Purchase Order

Open the Purchase Order you would like to change, scroll down on the PO and make note the Supplier and also the Form type (the P2P ordering Form that was utilized). From the Menu option, select "Create Change Request". @ # k k # k

u # # k Don't do anything else to it yet, just keep it as a draft. Remember the Change Request number for

future step. See below.



Please Note: The user must have at least one change request in Draft status to add a new line to it.

Shopping Home Page

3. Go to CSUBUY's "Shopping Home Page"

Create a new Form Request (same form type and same supplier as the PO you are changing). Go through the questions on the Form, but don't add it to a cart. Use the complete, go to the "Review and Submit" section of the Form Request, click on the drop down for "Add and go to Cart", and select "Add to Draft Change Request". See below.

Rev. 3/2025



Goods and Services Requ	Review and Submit			R	equest Actions 🔻 History ?
Form Number 1050342 Purpose Procurement Request Status Incomplete	 Required Fields Complete 				
Purgos Procurement Research Instructions Supplers • • Form Fields • • Other Cools & Benvices • Review and Submit 1	Regard Fields Complete Section Expoles Form Fields	Pregress	¢ Previous	Add to Favorites	2 Add and go to Carl - Add and go to Carl - Same Carl and Add Ander
				3	Add to Cart and Return Add to new Cart Add to Draft Cart or Pending PR/PO Add to Draft Change Request Add to PO Revision

Form Request

4. Selecting the action will open the "Add to Draft Change Request" overlay. A list of change requests in Draft status that are owned by the logged-in user, with the same supplier as the item(s) to be added is displayed. Select a change request (select the Change Request that you created in Step 1) and click "Add to Change Request". An error message is displayed if there are no suitable change requests.

🤳 Add To Draft C	hange Request - Work - Microsoft Edge	-	•	×
https://use	test.sciquest.com/apps/Router/AddDocLin	eltemPopup?lte	emld=	A™
Add To D	raft Change Request		Clos	e.
	Please select the appropriate Change Reques selected line item(s) are to be add	at to which the led.		
	Draft Change Request	7		
1	Select Change Requests			
	 2024-12-17 tmcbride 01 - CR (41 	85393)		
	Add To Change Request	2		

The Item is added to the Draft Change Request.

Please Note: An item can only be added to draft change requests that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added. An error message will be displayed if there are no suitable change requests.

Additionally, the Form Request must align with the Form Request Type of the original Purchase Order (PO), if not, an error message will also be displayed.

Purchase Order

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



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6. Click on the "Change Requests" tab and open the Change Request. See Below.

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Purchase (Order • Acm	e Corporation •	240002832T Rev	vision 0	1					
Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests 1	Receipts	Vouchers	Comments 1	Attachments	
Records	found: 1								+	
Status		Number	2	Owner		Created				
Draft		4185393	2	Tonya McBride		12/17/2024			Ť	

 Review the newly added item/line along with its associated details. Once you are done, click "Submit Request". The Change Request will proceed through the requisition workflow, followed by updates in the PO workflow, and then export to CFS.

hange Reque	sts • 41	85393									۰۰ 🖱 🖷 👁	Assign Draft	Submit Request
Summary	Taxes/S&H	PO Preview	External Com	munication Co	mments (1)	Attachments	History					2	
CHARTFIE	ELD							Values have been overridd	en for () 🖌		Summary		-1
Business	s Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project			Draft	
SMCMP Cal State 5	San Marcoa	10022_SMCMP General Fund Alloc 2022-23	1001_SMCMP FA Acad Resource Office	105001 Instructional Equipment	619804_SMCMP Equip Instructional > \$5000	no value	no value	no value	no value		Total (623.75 USD) Shipping, Handling, and each supplier. The valu	I Tax charges are calc es shown here are for	ulated and charged by estimation purposes.
Goods and t	Services Req	uest								🗆	budget checking, and w	orkflow approvals.	
Contract:		no value									Subtotal Sales Tax		600.00 23.75
This line item has	been added	1									Use Tax Shipping		0.00
2 Line 2					EA		200.00	1	200.00		Handling		0.00
	AILS									1			623.73
Performa	nce Start Dat	le		Commodity Code	150003 / Art		Tax Code	CHC Chico Sales Tax			Related Documents		~
Performa	nce End Date			Override Receiving Required	×		Taxable	~			Purchase Order: 24000 Requisition: 4185411	2832T	-
more info				Prepayment	no value		Asset	×			What's next for my or	der?	- -
				P0 Clauses	Add		Asset Profile	ID no value			Next Step DC Approvers Bo	A Approval - Deptic)
○ CHARTFIELD							;	/alues have been overridd his line	en for 🙆 🌶		Ha	rper, Malachi	
Business U	nit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project		Workflow		
SMCMP Cal State San	Marcos	10022_SMCMP General Fund Alloc	1001_SMCMP FA Acad Resource	150003 Art	660003_SMCMP SupSrv Other	no value	no value	no value	no value		Show skipper	d steps	

Help & Support

Open a Ticket Using <u>ServiceNow</u>.