Campus Customers
<table>
<thead>
<tr>
<th>AGENDA</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Module 1</td>
<td>System Introduction</td>
</tr>
<tr>
<td>Module 2</td>
<td>Shopping</td>
</tr>
<tr>
<td>Module 3</td>
<td>Other Shopping Requests &amp; Functions</td>
</tr>
<tr>
<td>Module 4</td>
<td>Approvals</td>
</tr>
<tr>
<td>Module 5</td>
<td>Purchase Orders</td>
</tr>
<tr>
<td>Module 6</td>
<td>Receiving</td>
</tr>
<tr>
<td>Module 7</td>
<td>Reporting</td>
</tr>
</tbody>
</table>
Training Structure & Flow

Each functionality covered today will follow this 2-step process:

- **Content**
- **Demos**

Each functionality covered today will follow the following 3-step process:

- Watch the facilitator’s lead to follow the steps of how the functionality works to accomplish the scenario
- Utilize the scripted example to facilitate a self-guided exercise
- **Collective recap of the scripted scenario focusing on:**
  - Key Takeaways
  - Challenges
  - Q & A
Lessons in This Module

- CSUBUY Overview
- Basic Navigation
- Searching and Reporting
- Search for Suppliers
CSUBUY Introduction

System Introduction
LESSON OBJECTIVES

- Explain the purpose of the CSUBUY system.
- Identify how the CSUBUY system can benefit your role.
- Log in to the CSUBUY system.
- Locate system help and support resources.
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.
Who Uses CSUBUY?
Overview of the user groups that use CSUBUY for purchasing.

- **Shoppers**
  - Shop and Create Carts

- **Requestors**
  - Shop, Create, and Submit Carts

- **Approvers**
  - Review and Approve Requisitions

- **Procurement**
  - Review and Approve Requisitions

- **Accounts Payable**
  - Create Payment for Purchases
How Does This Change My Role?

In CSUBUY, Campus Customers will:

• Shop for items and services.
• Track requests, purchases, and payments.
• Create receipts for goods and services.
How Do I Log In?

CSUBUY

Production Site
• SSO
Where Do I Get Help?

CSUBUY System Help
• Help button within the system

Support Resources
• Local CSU admin
• CSUBUY Training & Resources
Process Overview

Shop → Check Out → Approve Requisition → Create Purchase Order
Basic Navigation

System Introduction
Basic Navigation

LESSON OBJECTIVES

- Navigate the Shopping dashboard.
- Locate your user profile.
- Identify the key features of the notifications center.
- Update your system notification settings to your desired preferences.
- Use the search feature.
• Profile is not changeable
  Note favorites vs. defaults
# Set Up Your Notification Preferences

## User Profile and Preferences

<table>
<thead>
<tr>
<th>Training User</th>
<th>User Profile and Preferences</th>
<th>User's Name, Phone Number, Email, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>User Profile and Preferences</td>
<td>First Name</td>
</tr>
<tr>
<td>User’s Name, Phone Number, Email, etc.</td>
<td>Language, Time Zone and Display Settings</td>
<td>Last Name</td>
</tr>
<tr>
<td></td>
<td>Update Security Settings</td>
<td>Phone Number</td>
</tr>
<tr>
<td></td>
<td>Default User Settings</td>
<td>Mobile Phone Number</td>
</tr>
<tr>
<td></td>
<td>User Roles and Access</td>
<td>Email Address</td>
</tr>
<tr>
<td></td>
<td>Ordering and Approval Settings</td>
<td>Business Unit</td>
</tr>
<tr>
<td></td>
<td>Permission Settings</td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Notification Preferences</td>
<td>Position</td>
</tr>
<tr>
<td></td>
<td>User History</td>
<td>Authentication Method</td>
</tr>
<tr>
<td></td>
<td></td>
<td>User Name</td>
</tr>
</tbody>
</table>

## Notifications Preferences

### Notification Preferences:

<table>
<thead>
<tr>
<th>Shopping, Carts &amp; Requisitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By - Cart Assigned Notice</td>
</tr>
<tr>
<td>Prepared By - PR item(s) rejected</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
</tr>
<tr>
<td>Cart Assigned Notice</td>
</tr>
<tr>
<td>Receive PR and PO notifications for Carts Assigned to Me</td>
</tr>
<tr>
<td>Assigned Cart Processed Notification</td>
</tr>
<tr>
<td>Assigned Cart Deleted Notification</td>
</tr>
</tbody>
</table>
Log in and Notifications

Learn how to log in and access your profile and notification settings.

Log In
1. Open the login page for the site you want to access.
2. Enter your user credentials.
3. Select Sign In.

Update Notifications
1. Select your user icon in the top right corner.
2. Select View My Profile.
3. Update user profile settings.
4. Select Notification Preferences from the side menu.
5. Choose a set of notifications to update.
6. Select Edit Section to update your preferences.
7. Select Save Changes.
Search

System Introduction
Search

LESSON OBJECTIVES

- Locate requests and orders.
- Save a search.
Introduction to Search

Searching and Advanced Search

Saved Searches
## Locate Requests and Orders

### Search Purchase Orders

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2500000061</td>
<td>Cola's Contracting Services</td>
<td>4/3/2023 10:00 AM</td>
<td>Completed</td>
<td>3746008</td>
<td>Robert Parkinson</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>4,400.00 USD</td>
</tr>
<tr>
<td>2500000199</td>
<td>Cola's Contracting Services</td>
<td>3/31/2023 1:37 PM</td>
<td>Completed</td>
<td>3744902</td>
<td>Robert Parkinson</td>
<td>Sent To Supplier</td>
<td>Fully Matched</td>
<td>4,400.00 USD</td>
</tr>
<tr>
<td>2500000197</td>
<td>Acro Group</td>
<td>3/30/2023 10:50 PM</td>
<td>Completed</td>
<td>3744000</td>
<td>Robert Parkinson</td>
<td>Sent To Supplier</td>
<td>Fully Matched</td>
<td>1,081.88 USD</td>
</tr>
<tr>
<td>2500000194</td>
<td>Acro Group</td>
<td>3/30/2023 1:02 PM</td>
<td>Completed</td>
<td>3743003</td>
<td>Robert Parkinson</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>1,081.88 USD</td>
</tr>
<tr>
<td>2500000174</td>
<td>Iris Pelters &amp;</td>
<td>3/25/2023 11:59 AM</td>
<td>Completed</td>
<td>3739982</td>
<td>Deep</td>
<td>Sent To</td>
<td>No Matches</td>
<td>2,163.91 USD</td>
</tr>
</tbody>
</table>
## Save Search

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2300000664</td>
<td>David's Doughnuts</td>
<td>4/28/2023 7:37:20 AM</td>
<td>Completed</td>
<td>3751913</td>
<td>Layla Betar-Makhouli</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>450.65 USD</td>
</tr>
<tr>
<td>2300000663</td>
<td>Acx Group</td>
<td>4/28/2023 7:37:20 AM</td>
<td>Completed</td>
<td>3751913</td>
<td>Layla Betar-Makhouli</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>18,478.42 USD</td>
</tr>
<tr>
<td>2300000595</td>
<td>Hewlett-Packard Company</td>
<td>4/27/2023 3:28:33 PM</td>
<td>Completed</td>
<td>3762860</td>
<td>Chris Jones - Ohco</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>516.18 USD</td>
</tr>
<tr>
<td>2300000564</td>
<td>Acx Group</td>
<td>4/27/2023 3:28:33 PM</td>
<td>Completed</td>
<td>3757546</td>
<td>Layla Betar-Makhouli</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>375.00 USD</td>
</tr>
</tbody>
</table>
Search and Filters

Learn how to search and filter for requests and orders.

1. Navigate to **Orders > Search > Requisitions**.
2. Use **Quick Filters** on the left panel.
3. Use **Add Filter** for additional filters.
4. Add columns.
5. Select **Export** search results.
6. Save **Search**.
Search for Suppliers

Shopping
Search for Suppliers

LESSON OBJECTIVES

- Search for a supplier.
# Search Options

![Search Options](image)

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
<th>Supplier Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Supplier Not Known</td>
<td></td>
<td></td>
<td>Bob Loblaw</td>
</tr>
<tr>
<td>Acedic Search, Inc</td>
<td></td>
<td></td>
<td>Bontch, Nicolas</td>
</tr>
<tr>
<td>Acco Engineered Systems Inc</td>
<td></td>
<td></td>
<td>C Point Assoc LP</td>
</tr>
<tr>
<td>Acs Group</td>
<td></td>
<td></td>
<td>Carolina Biological Supply Co.</td>
</tr>
<tr>
<td>AGB Search LLC</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Find a Supplier

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Supplier Not Known</em></td>
<td></td>
<td></td>
<td><em>Supplier Not Known</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Search, Inc</td>
<td></td>
<td></td>
<td>Bortich, Nicholas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alice Group</td>
<td></td>
<td></td>
<td>C Point Assoc, Inc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADC Partners, LLC</td>
<td></td>
<td></td>
<td>Delinea Biological Supply Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AGB Search LLC</td>
<td></td>
<td></td>
<td>Central CalIF Faculty Med Grp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amazon.com</td>
<td></td>
<td></td>
<td>Central Valley Pumps</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts Car Rental</td>
<td></td>
<td></td>
<td>Chimax Corporation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMH Photo Video</td>
<td></td>
<td></td>
<td>Circuit City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BD Biosciences</td>
<td></td>
<td></td>
<td>Gole's Contracting Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>College Agency LLC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Suppliers

Learn how to search for a supplier.

1. From the Shopping flyout, select **Browse By > Supplier**.
2. Expand the Search for Supplier Filter by selecting the **Plus** icon.
3. Enter the Supplier or choose the Supplier Type from the drop-down menu.
4. Select **Search**.
MODULE 2

Shopping

Lessons in This Module

- Shop from a Punchout
- Check Out
- Shop Using a Form
- Reorder
- Assign a Shopping Cart
Shop from a PunchOut

Shopping
Shop from a PunchOut

LESSON OBJECTIVES

- Locate the PunchOut
- Add items to a cart with a PunchOut.
- Transfer items in PunchOut cart to CSUBUY cart.
Shop from a PunchOut

Learn how to shop from a PunchOut.

1. Locate the Supplier catalog.
2. Search for items.
3. Add items and quantity to your cart.
4. Submit your cart from the PunchOut.
5. Review your cart in CSUBUY.
6. Checkout.
7. Submit request.
Shop Using a Form

Shopping
Shop Using a Form

LESSON OBJECTIVES

- Access shopping forms.
- Submit shopping forms.
- Determine when to use each shopping form.
Available Forms

- Goods and Services Request
- Hospitality
- Independent Contractor
- IT Hardware
- IT Software
- Payment for Unauthorized Purchase
- Facilities and Construction Requests
Request Forms

Learn how to submit request forms listed below.

- Goods and Services
- Hospitality
- Independent Contractor
- IT Hardware
- IT Software
- Payment for Unauthorized Purchase
- Facilities and Construction Requests
Assign a Shopping Cart

Shopping
Assign a Shopping Cart

LESSON OBJECTIVES

- Identify when to assign a cart to another user.
Assign a Shopping Cart

Note assign same or higher role. If you don’t see name, the individual may not be in CSUBUY
### “Prepared By” Versus “Prepared For”

<table>
<thead>
<tr>
<th>Prepared By</th>
<th>Prepared For</th>
</tr>
</thead>
</table>
| 1. Submitted the cart.  
2. Created the requisition. | 1. Created the cart.  
2. Then assigned it to another user. |

**Note:** “Prepared By” and “Prepared For” can be the same user.

- **Prepared By:** The user submitting the cart, creating the requisition
- **Prepared For:** The user who created the cart and then assigned it to another user. This individual owns the requisition

*Note that the Prepared By and Prepared For can be the same user.*
Shopping Cart

Learn how to manage a shopping cart.

1. Create a shopping cart with items.
2. Select Assign Cart.
3. Search for the individual to assign the cart to.
4. Enter their information.
5. Select Search.
6. Enter a note to the assignee.
7. Select Assign.
Check Out

Shopping
Check Out

LESSON OBJECTIVES

- Update accounting fields to check out.
## Chartfields

<table>
<thead>
<tr>
<th>Item</th>
<th>Catalog No.</th>
<th>Size/Package</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>HMK Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black</td>
<td>HMKMYAIR10</td>
<td>EA</td>
<td>281.43</td>
<td>1 EA</td>
<td>281.43</td>
</tr>
</tbody>
</table>

### Item Details
- Manufacturer: HMK
- Manufacturer Part Number: HMKMYAIR10
- Commodity Code: 150007 / Furniture
- Taxable: Yes
- Assort: No

### General Information
- Tax Code: CA
- CA Sales Tax

### Account Info

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Fund</th>
<th>DeptID</th>
<th>Commodity Code</th>
<th>Account</th>
<th>Account Override</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>No value</td>
<td>No value</td>
<td>No value</td>
<td>15059777</td>
<td>No value</td>
<td>No value</td>
<td>No value</td>
<td>No value</td>
<td>No value</td>
</tr>
</tbody>
</table>
Check Out and Submit Order

CSUBUY

1. HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (HONCMY1AUR10)

   Manufacturer: HON COMPANY
   Contact:
   Commodity Code: 110007
   Asset Code: Furniture
   Supplier Part Number: 2729611
   Asset Profile ID: Search
   Prepayment: ✓

   Item Details

   Catalog No: 2729611
   Description: HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black
   Unit Price: 285.43
   Quantity: Qty: 1 EA
   Ext. Price: 285.43

   Total: 1,299.05 USD

Campus Customers
Update Chartfields

Learn how to accurately select accounting fields.

1. Navigate to the shopping cart.
2. Review the accounting fields.
3. Update fields with the correct information.

Show favorites of the charfield
Other Shopping Forms & Functions

Lessons in This Module

- Other Forms
- Request a New Supplier
- Reorder
- Blanket Orders
Other Forms

Shopping
Other Forms

LESSON OBJECTIVES

- Access other forms.
- Submit other forms.
- Determine when to use each form.
## Request to Close/Reopen Purchase Order

<table>
<thead>
<tr>
<th>Questions - Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Details</strong></td>
</tr>
<tr>
<td>Action Needed</td>
</tr>
<tr>
<td>Purchase Order Number</td>
</tr>
<tr>
<td>Supplier Name</td>
</tr>
<tr>
<td>Justification for Request</td>
</tr>
</tbody>
</table>

Form Number: 781777
Purpose: Generic Request
Status: Incomplete

*Response is Required*
Other Forms

Learn how to use form requests in CSUBUY.

- Direct Pay
- Request to Close/Reopen Purchase Order
Request a New Supplier

Shopping
Request a New Supplier

LESSON OBJECTIVES

- Request a new supplier from which to purchase goods or services.
1. User creates and submits request for new supplier
2. Request routes for review/approval by CSU Supplier Management team
3. If approved, supplier profile gets created
4. User gets notified that supplier is available for shopping
New Supplier Process

When to use each process (standard vs emergency)
Request a New Supplier

Request New Supplier

Supplier request form

Cal State Supplier Request

Supplier name ★

* Required

Submit Close
Request a Supplier

Learn how to request a supplier.

1. Select the Supplier Request Form from the Quick Links widget on the home page.
2. Enter in the Supplier name.
3. Select Submit.
4. Complete the supplier request.
Reorder

Shopping
Reorder

LESSON OBJECTIVES

- Find a previous order.
- Update items in the new cart.
Reorder

Learn how to shop for items that were previously purchased.

1. Locate the purchase order that has the items to add to your active cart.
2. Go to the Summary subtab.
3. Scroll down to the list of items in the order.
4. Select the item.
5. Select Add to Active Cart.
Blanket Orders

Shopping
Blanket Orders

LESSON OBJECTIVES

- Determine when to use a blanket order.
- Identify an order as a blanket order.
When to Use Blanket Orders

For goods and services that require multiple payments.
Specify a Blanket Order

Form Fields - Form Fields

General Information
What type of goods or services are you requesting? *

Did you receive one or more quotes for your request? *

○ Yes ○ No

Is this a Blanket Order? *

○ Yes ○ No

Is the request for a renewal of a previous purchase?
Blanket Orders

Learn how to create a Blanket Order.

1. Navigate to **Goods and Services Request Form**.
2. From the Instructions page select **Next**.
3. Complete the supplier information, then select **Next**.
4. Complete the Form Fields information. Be sure to select **Yes** under “Is this a Blanket Order?”.
5. Select **Next**.
6. Review the request, then select **Submit**.
MODULE

Approvals

Lessons in This Module

- Approval Workflow
- Approval Actions
Approval Workflow

Approvals
Approval Workflow

LESSON OBJECTIVES

- Explain the approval workflow.
End users specifically approves vouchers. That’s something we will need to cover but not necessary approving requisitions
End users specifically approves vouchers. That’s something we will need to cover but not necessary approving requisitions
Approval Actions

Approvals
Approval Actions

LESSON OBJECTIVES

- Add comments to a requisition.
- Approve, reject, and return requisitions.
Review a Requisition

- Put a request on hold
- Add comments
- Approve, return, or reject
Purchase Orders

Lessons in This Module

- Distribution
- Order Status
Distribution

Purchase Orders
Distribution

LESSON OBJECTIVES

- Identify the distribution methods for a purchase order.
- Apply the process for error handling with purchase orders during distribution.
Purchase Order Distribution

- cXML
- Email
- Fax
- Manual
Order Status

Purchase Orders
Order Status

LESSON OBJECTIVES

- Search for a purchase order.
- Identify the status of a purchase order.
## Define Order Status

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>25000000001</td>
<td>Colins Contracting Services ©</td>
<td>4/3/2023 10:00 AM</td>
<td>Completed</td>
<td>37450088</td>
<td>Robert</td>
<td>Supplier</td>
<td>No Matches</td>
<td>4,406.00 USD</td>
</tr>
<tr>
<td>25000000119</td>
<td>Colins Contracting Services ©</td>
<td>3/31/2023 1:37 PM</td>
<td>Completed</td>
<td>3744902</td>
<td>Robert</td>
<td>Sent To Supplier</td>
<td>Fully Matched</td>
<td>4,406.00 USD</td>
</tr>
<tr>
<td>25000000197</td>
<td>Acis Group ©</td>
<td>3/30/2023 1:00 AM</td>
<td>Completed</td>
<td>3740000</td>
<td>Robert</td>
<td>Supplier</td>
<td>Fully Matched</td>
<td>1,018.88 USD</td>
</tr>
<tr>
<td>25000000164</td>
<td>Acis Group ©</td>
<td>3/30/2023 1:00 AM</td>
<td>Completed</td>
<td>3743003</td>
<td>Robert</td>
<td>Supplier</td>
<td>No Matches</td>
<td>1,018.88 USD</td>
</tr>
<tr>
<td>25000000174</td>
<td>IRIS Rollers &amp; Wheels ©</td>
<td>3/25/2023</td>
<td>Completed</td>
<td>3739982</td>
<td>Dee</td>
<td></td>
<td>2,163.91 USD</td>
<td></td>
</tr>
</tbody>
</table>
Search for an Order

Learn how to search for an order and check the status of it.

1. Select Orders from the flyout menu.
2. Select Purchase Orders.
3. Use the Quick Filters to view purchase orders with a specific order status.
6

Receiving Goods and Services

Lessons in This Module

- Receiving
End users do not create 3-way good receipt at every campus. Chico/Fresno does not. They would do services receipt. That is what should be demo for them.
Receiving

LESSON OBJECTIVES

- Identify the type of items that need a receipt.
- Determine the locations where items may be received.
- Compare the differences between cost and quantity receipts.
- Apply the process of receiving an order.
What Needs a Receipt?

Goods
- 3-way
- Receipt required
- Created by Central Receiving

Services or Blanket PO
- 2-way
- No Receipt Required – Verification Approval
- Verified by Campus User

Needs to say that services need a 2-way (no receipt) by Campus Users while goods need a 3-way (receipt required) by Central Receiving
Receipt Verification

Learn how to verify services are received:

1. Navigate to the Orders flyout, select Accounts Payable > Vouchers to Approve.
2. Locate the voucher to Verify Services Received.
3. Review and approve or reject the voucher.

This will have to be toggled. Chico/Fresno campus customers does not create receipts. They approve services.
Reporting

Lessons in This Module

- Locate reports using the search function.
- Voucher Payment Information
Search

LESSON OBJECTIVES

- Locate a Requisition.
- Locate a Purchase Order.
- Locate a Receipt.
- Locate a Voucher.
## Find a Requisition

<table>
<thead>
<tr>
<th>Requisition Number</th>
<th>Supplier</th>
<th>Requisition Name</th>
<th>Status</th>
<th>Prepared For</th>
<th>Submitted Date</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3770463</td>
<td>Hewlett-Packard Company</td>
<td>2023-05-10 bgushchov 01</td>
<td>Completed</td>
<td>Bryan G. Bushchov</td>
<td>5/10/2023 7:16:13 AM</td>
<td>$3,870.30 USD</td>
</tr>
<tr>
<td>3770293</td>
<td>Cintas Corporation</td>
<td>TEST E2E03-01 HAZMAT</td>
<td>Completed</td>
<td>CELIA GONZALEZ</td>
<td>5/9/2023 6:25:46 PM</td>
<td>$3,094.90 USD</td>
</tr>
<tr>
<td>3770030</td>
<td>Circuit City</td>
<td>E2E02 - 01 (Relast) EHS &amp; Facilities Review</td>
<td>Completed</td>
<td>Antoinette Castanon</td>
<td>5/9/2023 10:53:46 AM</td>
<td>$15,090.00 USD</td>
</tr>
<tr>
<td>3770121</td>
<td>David's Doughnuts</td>
<td>2023-06-09 2000468860401</td>
<td>Pending</td>
<td>Layla Belar-Mahhouli</td>
<td>5/9/2023 10:50:23 AM</td>
<td>$3,777.00 USD</td>
</tr>
<tr>
<td>3770052</td>
<td>Circuit City</td>
<td>TEST - E2E2-01</td>
<td>Completed</td>
<td>CELIA GONZALEZ</td>
<td>5/9/2023</td>
<td>$14,999.90 USD</td>
</tr>
</tbody>
</table>
## Find a Purchase Order

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>23000000747</td>
<td>Hewlett-Packard Company ©</td>
<td>5/10/2023 7:16:56 AM</td>
<td>Completed</td>
<td>3770463</td>
<td>Bryan</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>$3,076.20 USD</td>
</tr>
<tr>
<td>23000000746</td>
<td>Cias Corporation ©</td>
<td>5/10/2023 7:10:58 AM</td>
<td>Completed</td>
<td>3770293</td>
<td>CELIA</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>$3,004.90 USD</td>
</tr>
<tr>
<td>23000000745</td>
<td>Bob Loblaw ©</td>
<td>5/5/2023 4:58:36 PM</td>
<td>Completed</td>
<td>3770020</td>
<td>Layla</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>$5,636.63 USD</td>
</tr>
<tr>
<td>23000000744</td>
<td>Bartech, Nicolas ©</td>
<td>5/9/2023 11:00:28 AM</td>
<td>Completed</td>
<td>3769481</td>
<td>CELIA</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>$2,008.00 USD</td>
</tr>
</tbody>
</table>
Find a Voucher

Campus Customers
## Voucher Pay Status

<table>
<thead>
<tr>
<th>Voucher Type</th>
<th>Pay Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD Voucher</td>
<td>In Process</td>
<td>56,320.00 USD</td>
</tr>
<tr>
<td>PD Voucher</td>
<td>In Process</td>
<td>1,668.75 USD</td>
</tr>
<tr>
<td>PD Voucher</td>
<td>In Process</td>
<td>3,011.75 USD</td>
</tr>
<tr>
<td>PD Voucher</td>
<td>In Process</td>
<td>314.03 USD</td>
</tr>
<tr>
<td>PD Voucher</td>
<td>Payable</td>
<td>107,250.00 USD</td>
</tr>
<tr>
<td>PD Voucher</td>
<td>Payable</td>
<td>314.50 USD</td>
</tr>
</tbody>
</table>

### Payment Information

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Status</td>
<td>Payable</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Unknown</td>
</tr>
<tr>
<td>Payment Record No.</td>
<td>no value</td>
</tr>
<tr>
<td>Payment Record Date</td>
<td>no value</td>
</tr>
<tr>
<td>Payment ID Ref</td>
<td>no value</td>
</tr>
<tr>
<td>Cancellation Date</td>
<td>no value</td>
</tr>
</tbody>
</table>
Filter Options and Export

Learn how to filter options and export.

1. Navigate to Home > Accounts Payable > Search for Vouchers.
2. Select Add Filter.
4. Select the box beside each voucher.
5. Select Export All or Export Selected Rows.
6. Complete Title and Type.
7. Select Submit.
Voucher Payment Information

Purchase Orders
Voucher Payment Information

LESSON OBJECTIVES

- Locate voucher payment details.
Look Up Payment Information

Included with the Paid Voucher:

• Pay Status
• Payment Method
• Payment Record No.
• Payment Record Date
• Payment ID Ref.
• Payment Partially Paid
• Cancellation Date
• Escheatment Date
• Reconciliation Date
• Total Payment Amount
• Voucher Payment Amount

End users won’t see all of this. First 5-6
Search for Payment Information

Learn how to search for payment information.

- Search to review payment information on the voucher.
- View how a PO is linked to a voucher.
SUPPORT

CSUBUY System Help
• Help button within the system

Support Resources
• Local CSU admin
• CSUBUY Training & Resources