Line Item Options

This guide outlines the process for all options relating to the line item itself. The list below will help reference where in the document contents appear.

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Purchasing > Requisition > Add/Update Requisitions

1. Enter the Business Unit; STCMP
2. Enter the Requisition ID OR enter the Requestor User ID
3. Click on the Search button
4. Select the requisition from the Search Results

5. Select the icon to add an additional line item to a requisition

6. Click the OK button
7. Enter the item description - Descriptions must begin with a word that describes what you are purchasing; for example: computer, plants, etc.

8. Enter the quantity.

9. Enter the UOM; Unit of Measure.

10. Enter the Category.

11. Enter the price per unit.

12. Select the icon to delete a line from the requisition.
ADD LINE ITEM COMMENTS

13. Select the Line Comments icon to enter comments pertaining to this line only.

**NOTE:** Line Comments are used specifically for the item you are ordered. Comments can be directed towards the Vendor, Shipping & Receiving, or Accounts Payable.

**NOTE:** Attachments should entered on Header Comments.

14. Type the comments.

15. Select who the comments are for:
- Send to Vendor; if the comment need to be viewed by the vendor
- Shown at Receipt; if the comment needs to be viewed by receiving
- Shown at Voucher; if the comment needs to be viewed by Accounts Payable

16. Click the OK button.
SPLITTING CHARTFIELD DISTRIBUTION

17. Click Requisition Defaults

18. Select the Default radio button

19. Click the OK button
20. Click the Mark All link

21. Click the OK button

NOTE: The retrofit message comes up anytime you make any changes to the Defaults page.

22. Click on the Schedule icon

NOTE: Splitting distributions must be done on each line item that needs to be split between funding sources.
23. Click on the Distribution icon

24. Enter the percentage amount for the default chartfield string

25. Tab

26. Select the icon to add an additional chartfield line

27. Enter the number of lines to add; i.e. if adding 2 more chartfield strings type in 2

28. Click the OK button
29. Change the Fund, Dept, Program, and Project

30. Repeat Steps #17-24 to enter more than one line distribution.

31. Click the OK button

**NOTE:** Once the Ok button is selected the screen will return to the schedule page.

32. Click the Return to Main Page link

**NOTE:** PeopleSoft will return back to maintain requisition screen.
33. Click on the Supplier Information tab

34. Verify that the Vendor Name is populated on all line items; if not copy and paste vendor number into empty fields
35. Click on the Attributes tab

36. If this is a service order, select Services from the drop down menu under Physical Nature

37. Check the Amount Only box if the order is to be distributed by amount rather than quantity. For example—Blanket Orders
38. If this is a line item that does not have a price attached to it, select the Zero Price Indicator box.

**NOTE:** If the Zero Price Indicator is selected, Services and the amount only box CANNOT be checked.

39. Click the Save button.
NOTIFICATION

40. Select the Notify button

NOTE: Notify is used to let the next individual know this is ready for review.

41. Enter the full email address of the recipient in the To: field
OR
Click the link for Lookup Recipient

**NOTE:** If you use the lookup recipient feature the requisition will appear in the recipient’s worklist. Although worklist is not functional at this time it may be in the future.
CFS Purchasing

Send Notification

Lookup Address

Recipients Search

Name: Reviewer

Search

Search Results

<table>
<thead>
<tr>
<th>To</th>
<th>cc</th>
<th>bcc</th>
<th>Recipient</th>
<th>Email Address</th>
<th>UserID</th>
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<tbody>
<tr>
<td></td>
<td></td>
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<td><a href="mailto:reviewer1@csustan.edu">reviewer1@csustan.edu</a></td>
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<td>900000000997</td>
</tr>
</tbody>
</table>

Add to Recipient List

Recipient List

To: Reviewer1 / 900000000988

CC: Reviewer2 / 900000000997

Add to Recipient List

OK Cancel

Send Notification

Notification Details

To: Reviewer1 / 900000000988

CC: 

BCC: 

Priority: 2: Med

Subject: Requisition #0000002512 - Please see item (1) below

Template: Requisition Notification for STCMP #0000002512. Detail messages are listed below.

1. This is a request to approve the Requisition

Message: 

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page.

OK Cancel Apply

42. Enter partial last name in Name: field

43. Click the Search button

44. Select the To box to select the individual

45. Click the Add to Recipient List button

46. Click the OK button

47. Change the Priority if necessary

48. Type the message to the recipient

SAMPLE MESSAGE: Dear Reviewer, please review the requisition and forward to the next approving authority.

49. Click the OK button

NOTE: Notification is automatic.
50. Select the Requisition Activities link

51. Enter comments that the requisition has been sent on and add initials

SAMPLE COMMENT: Sent to Reviewer for review. REQ

52. Click the OK button

53. Click the Save button one last time