How to Create a Change Chartfield Requisition

PLEASE DO NOT SUBMIT FURTHER INVOICES DURING THIS CHANGE PROCESS.

1. Check Activity Summary for remaining balance

Take the following steps to navigate to PO Activity Summary page:

Step 1: Log into CFS - [https://ds.calstate.edu/?svc=cfs](https://ds.calstate.edu/?svc=cfs)

Step 2: Click on the NavBar icon

Step 3: Navigate to "Activity Summary"
   (NavBar → Navigator → Purchasing → Purchase Orders → Review PO Information → Activity Summary)

Step 4: Enter "SFCMP" in the "Business Unit" field and the associated PO Number in the "PO Number" field and click "Search"

Step 5: Click on the “Invoice” tab and scroll to the right to see the “Un-invoiced Amount”
   The “Un-invoiced Amount” is your remaining balance.

Step 6: Un-invoiced amount = remaining balance. Write down the remaining balance amount.
   This information is required for the next step.

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2. **Create new requisition for the remaining balance**

   Step 1: Navigate to “Add/Update Requisition”
   (NavBar ➔ Navigator ➔ Purchasing ➔ Requisitions ➔ Add/Update Requisitions)

   Step 2: Create a new requisition how you normally do.

   Step 3: Enter the following information into the “Description” field:
   “Chartfield Change for PO Number, Line Number, Buyer Name”
   (Example: Chartfield Change for PO Number 2201900001, Line Number 5, Nancy Trinh)

   Step 4: Enter the remaining balance from part 1 of this guide into the “Price” field.

   Step 5: Click on the Schedule icon

   ![Schedule Icon](image)

   Step 6: Click on the Distribution icon

   Step 7: Enter the new Chartfield string

   Example:

   ![Chartfield String](image)

   Step 8: Please make sure all necessary fields are accurate

   Step 9: Click OK, Click Return to Main Page Hyperlink, then click Save

   *Approvers will need to review, approve, and budget check requisition ([How to Approve and Budget Check a Requisition User Guide](#))

   *Procurement will process the Chartfield Change Requisition.

   *Please note requesters are not required to complete the PO Close & Decrease Form if an invoice was paid against the original line. The assigned buyer will decrease the original line amount if necessary.*