



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>

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”

PO Activity Summary
Enter any information you have and click Search. Leave fields blank for a list

[Find an Existing Value](#)

Search Criteria

Business Unit

PO Number

Purchase Order Date

Purchase Order Reference

Supplier ID

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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.

Activity Summary

Business Unit SFCMP PO Status Dispatched
Purchase Order 2201800967 Supplier TECHNICAL SAFETY SERVICES LLC
Supplier Location REP

Merchandise Amount	700.00 USD
Merchandise Receipt	0.00 USD
Merchandise Returned	0.00 USD
Merchandise Invoiced	675.12 USD
Merchandise Matched	675.12 USD

Lines [Personalize](#) [Find](#) [View All](#) First of 1 Last

Line	Item	Item Description	UOM	Amt Invoiced	Currency	Un-invoiced Amount	Curr
1		Troubleshoot, Install, and Cal	LOT	675.120	USD	24.880	USD

[Return to Search](#) [Notify](#)

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

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 

Maintain Requisitions

Requisition

Business Unit SFCMP Status Open
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name Chartfield Change 2201800967 Copy From Hold From Further Processing

Header

*Requester 75904588352 Trinh, Nancy
*Requisition Date 09/19/2019 Requisition Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 09/19/2019

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 24.88 USD

Add Items From

Step 3 Purchasing Kit Catalog
Item Search Requester Items

Step 4

Step 5

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	Supplier	Supplier Name
1	Chartfield Change for	1.0000	LOT	93800	24.88000	24.88	Open	0000004847	TECHNICAL SAFETY SERVICES LLC

Step 6: Click on the Distribution icon 

Step 7: Enter the new Chartfield string

Example:

Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Product	Project
24.88	SFCMF	660003	NG001	6075		12345		901234567

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.