

# What Forms Should I Use For Each Transaction?



*Learn what forms to use for various transactions within CSUBUY.*

## **CSU FORM REQUESTS**

The form requests for CSUBUY are used to create complex requests for the purchase of goods and services. These forms are located on the **Shopping Home Page** under **Showcases**. Open a request form and complete the required information before submitting your request. Review the different forms that are available to determine which to use.

### **Goods and Services Request**

Use to request goods and/or services that are not available via any catalogs.

Examples include:

- Classroom or Laboratory Supplies
- Drone
- Equipment
- Furniture
- Legal Services
- Marketing or Branded Items
- Transportation Charters
- Vehicles
- Goods - Other
- Services - Other

### **IT Hardware Request**

Use to initiate a request for IT Hardware and Accessories.

### **IT Software Request**

Use to initiate a request for IT Software, Website or Software Maintenance, or Cloud Services.

### **Hospitality Form (Non-Travel)**

Use to initiate a request for non-travel Hospitality, such as:

- Award or Service Recognition
- Catering
- Entertainment Services
- Farewell Award or Event
- Morale Function
- Participation Incentive
- Promotional Items
- Venue

**Payment for Unauthorized purchase**

Use to process a payment for a good or service that was not authorized through the appropriate purchasing channels. A reason or justification is required.

**Request to Close/Reopen PO**

Use to request to reopen or close an existing PO. Note that this request will be routed to the campus Purchasing department for review and processing.

**Facilities and Construction Request**

Use to initiate a Facilities or Public Works Project. Note that this form request is for Facilities use only.

Examples include:

- Construction
- General Services / Installation and Supply
- Maintenance of State Facility or Property
- Professional Services (related to Public Works)
- Other

**Supplier Extension Request**

Use to request a supplier that exists within CSUBUY but for another campus.

**Emergency Supplier Request**

Use to request a supplier if (1) the supplier doesn't exist in CSUBUY, and (2) this is a valid emergency. This form will route to Purchasing or AP for approval before routing to supplier management.