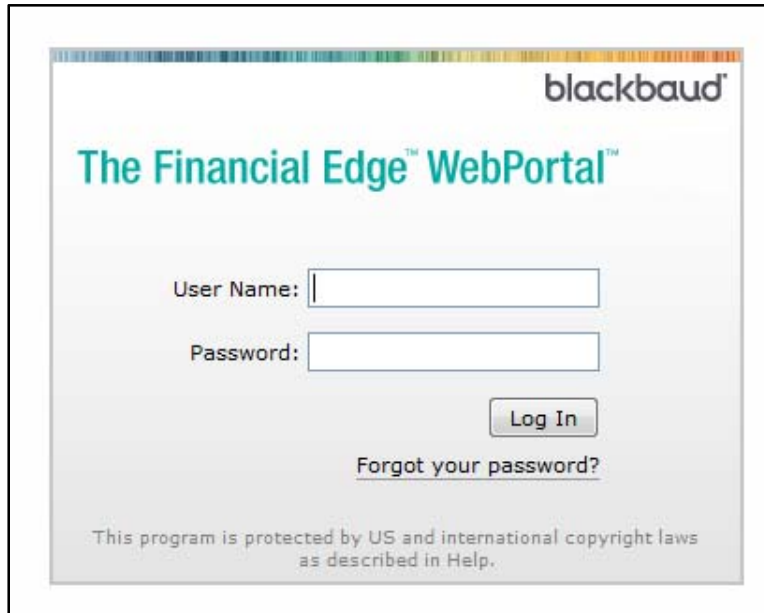


Web Invoice

Creating a New Vendor

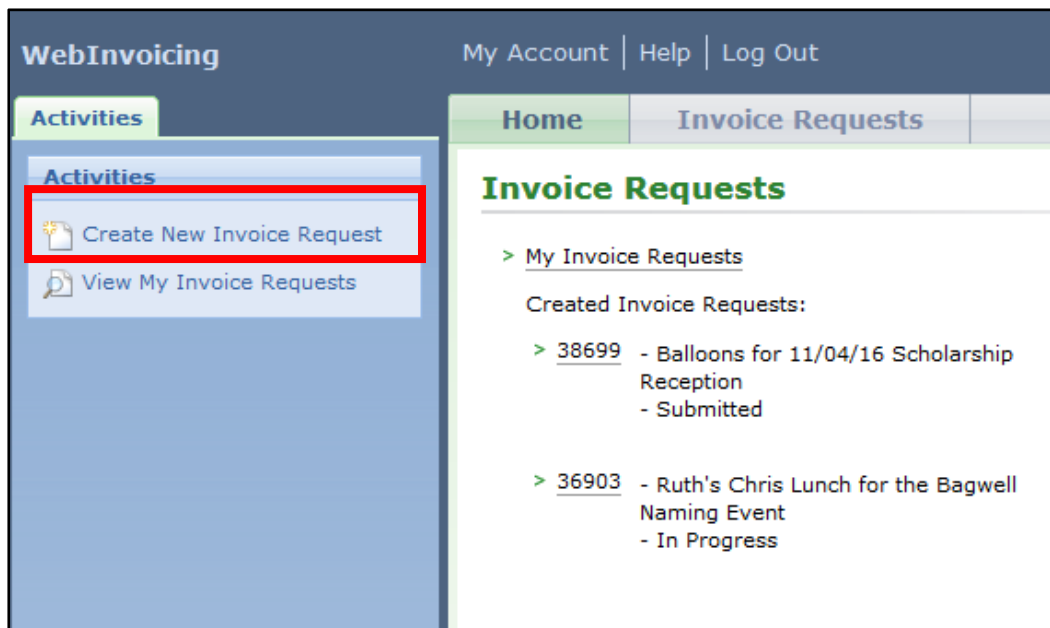
1. Sign In

Link: <https://fewebin.v.kennesaw.edu>



The screenshot shows the login page for Blackbaud's The Financial Edge WebPortal. At the top right is the Blackbaud logo. Below it, the title "The Financial Edge™ WebPortal™" is displayed in green. The login form consists of two input fields: "User Name:" and "Password:". Below the password field is a "Log In" button. A link for "Forgot your password?" is positioned below the button. At the bottom of the page, a small disclaimer states: "This program is protected by US and international copyright laws as described in Help."

2. Select **Create New Invoice** under the **Activities** tab





The screenshot displays the WebInvoicing user interface. The top navigation bar includes "WebInvoicing" on the left and "My Account | Help | Log Out" on the right. Below the navigation bar, there are two main tabs: "Activities" (highlighted in green) and "Invoice Requests". Under the "Activities" tab, there are two options: "Create New Invoice Request" (highlighted with a red box) and "View My Invoice Requests". The "Invoice Requests" tab is also visible, showing a list of "Created Invoice Requests" with details such as "38699 - Balloons for 11/04/16 Scholarship Reception" and "36903 - Ruth's Chris Lunch for the Bagwell Naming Event".

Web Invoice

Creating a New Vendor

3. Requestor:

- a. Select  (Search) next to *Requestor*

Requestor: 

- b. Select **Search** then select *****New Vendor*****

Find a Vendor... X

Vendor Name: City:

Vendor ID: State:

Purchase Order #:

More than 100 Records Found.

Search

Vendor Name	Vendor ID	City	State/Province
NEW VENDOR	5453		
<u>1st Coast Printing</u>	4809	Ponte Vedra Beach	Florida
<u>21st Century Leaders Inc.</u>	7051	Decatur	Georgia
<u>360 Media Inc.</u>	7308	Atlanta	Georgia
<u>A Courteous Communications</u>	6003	Orlando	Florida
<u>A Delightful Bitefull Catering LLC</u>	5852	Marietta	Georgia
<u>A Step Ahead LTD</u>	6779	Mableton	Georgia
<u>A&D Painting Inc.</u>	7433	Tucker	Georgia
<u>AAA Security Shredding Inc.</u>	6314	Woodstock	Georgia
<u>Dr. Samuel Abaidoo</u>	1680	Kennesaw	Georgia
<u>Hussein Abaza</u>	7284	Marietta	Georgia

Web Invoice

Creating a New Vendor

4. Approval Rule:

- a. Select **00.00.NV – New Vendor** Approval Rule

The screenshot shows the 'New Invoice Request' form in a web application. The 'Approval Rule' dropdown menu is open, displaying a list of options. The selected option is '00.00.NV - New Vendor Request'. Other options include '17.119 ADV/DEV Major Gifts', '17.120 ADV/DEV Donor Relations', '17.121 ADV/DEV Annual Giving', '17.142 ADV/DEV Communication', '17.143 - Adv/Dev - Trustee Rel', '17.73 ADV/DEV Office of VP', '17.80 ADV/DEV Corporate Develo', '17.87 ADV/DEV Alumni Affairs', '17.87.A10 Alumni Affairs (AF)', and 'Delete Request Rule'. The form also shows 'Created By: kbelang1', 'Requestor: ***NEW VENDOR***', 'Status: Open', and 'Document Date: [empty]'. There are 'Submit Invoice Request' and 'Save' buttons.

5. Enter **Document Date** and **Description** for the expense from the New Vendor

The screenshot shows the 'New Invoice Request' form with the 'Document Date' and 'Description' fields highlighted in red. The 'Approval Rule' is now '17.120 ADV/DEV Donor Rel'. The 'Created By' is 'kbelang1' and the 'Requestor' is an empty field. The 'Status' is 'Open'. The 'Document Date' and 'Description' fields are empty and highlighted in red.

6. Document Date:


- a. When the request is made in the same month as the invoice date, the document date is the actual invoice date.
- b. When the request is created using multiple receipts, the document date is the latest date.
- c. When the request is made in a different month than the invoice being submitted, the document date is the first date of the current month.

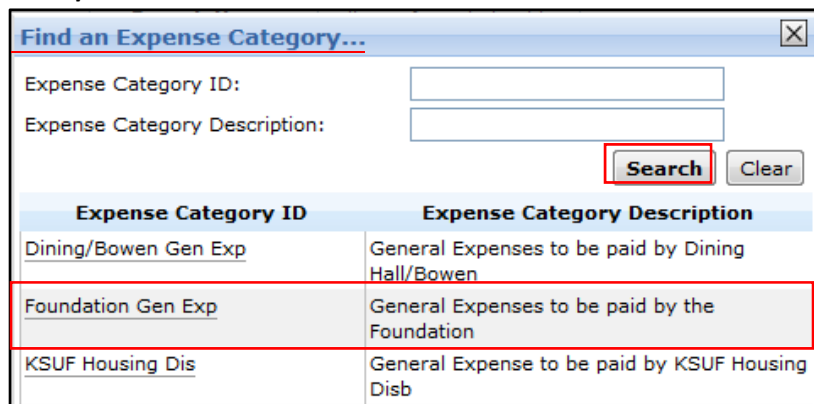
Web Invoice

Creating a New Vendor

7. **Description Header:**
- Describe the expense in as much allowable detail capturing the essence of the request.

8. **Add Attachments:**
- New Vendor: W9 Form

9. **Expense Category:**
- Select  under *Expense Category*
 - Select *search* under *find an expense category* and then select *Foundation General Expense*



Expense Category ID	Expense Category Description
Dining/Bowen Gen Exp	General Expenses to be paid by Dining Hall/Bowen
Foundation Gen Exp	General Expenses to be paid by the Foundation
KSUF Housing Dis	General Expense to be paid by KSUF Housing Disb

- Leave *date* blank

Line #	Expense Category	Description
1	Foundation Gen Exp	General Expenses to be paid by the Foundation
	Date: Leave blank	

- Type the total amount in the *rate* field

Quantity	Rate
1.0000	\$76.0100

- Select the *Not Distributed* link

Quantity	Rate	Line Item Total
1.0000	\$76.0100	
		<u>Not Distributed</u>


Web Invoice


Creating a New Vendor


- f. Select  under **Project**

Edit Distribution

Detail View

 Amount: GL Account:

<input type="button" value="Add"/>	Amount	Project
	<input type="text" value="\$76.01"/>	<input type="text"/> 

Once you select  under **Project**, the below screen will appear. Click the **search** button to bring up a list of all projects listed under your login.

Find a Project...

Project ID: Division:

Project Description: Department:

Type: Location:

Status:

ID	Description	Status	Type	Division	Department	Location
----	-------------	--------	------	----------	------------	----------

- g. Once the list of **projects** appears, select the appropriate **Project ID** and then select **OK**.

Find a Project...

Project ID: Division:

Project Description: Department:

Type: Location:

Status:

ID	Description	Status	Type	Division	Department	Location
10UEGRECOGN	Development - Donor Recognition	Active	06 - Unrestricted Budget	17 - University Development	73 - Vice President for University Advancement and Developme	02 - President's Cabinet
10UEGSOLICIT	Development - Donor Solicitation	Active	06 - Unrestricted Budget	17 - University Development	73 - Vice President for University Advancement and Developme	02 - President's Cabinet
A10ALUMEVENT	Alumni Events (Alumni)	Active	06 - Unrestricted Budget	17 - University Development	87 - Alumni Affairs	05 - University Support
A10BOARDS	Alumni Boards (Alumni)	Active	06 - Unrestricted Budget	17 - University Development	87 - Alumni Affairs	05 - University Support

Select the appropriate **Project ID**

Web Invoice





Creating a New Vendor

10. Expense Detail:

- a. Describe in detail the expense. Be sure to address **who, what, why, when and where**. If the request appears vague, ambiguous or not clearly related to an institutional purpose, it will be returned for additional justification.

11. Attributes: DO NOT CHANGE ANY OF THE 'ATTRIBUTE TYPE' QUESTIONS

- a. Invoice Number:
 - i. The number from the attached invoice. If there is no invoice number, you must assign it an identifier using letters and/or numbers. The only requirement to creating an invoice number is that you are consistent with the formatting. For instance, if you choose to use 3 letters and 2 numbers, please use this same format for all future invoices that do not have an invoice number.
- b. Change Required to Vendor Record:
 - i. Most of the time, you will select **no**. In the instance a change of address is submitted with the invoice, you would select **yes**.
- c. Payment Type:
 - i. Select the proper payment type from the drop-down list. The preferred method is **Check – Mail to Vendor**. If **Check – hold for pick-up** is selected, please provide a phone number in the **expense detail/purpose** for the vendor picking up the check.
- d. Check Requires a Remittance Advice:
 - i. Again, most of the time you will select **no**. However, in the instance the vendor requests a copy of the invoice, select **yes**.

Attributes		
Add	Attribute Type	Description
	A Invoice Number ▼	<input type="text"/>
	B Changes Requir ▼	<input type="text"/> ▼
	C Payment Type ▼	<input type="text"/> ▼
	D Check requires ▼	<input type="text"/> ▼

12. Final Step

- a. Submit your request