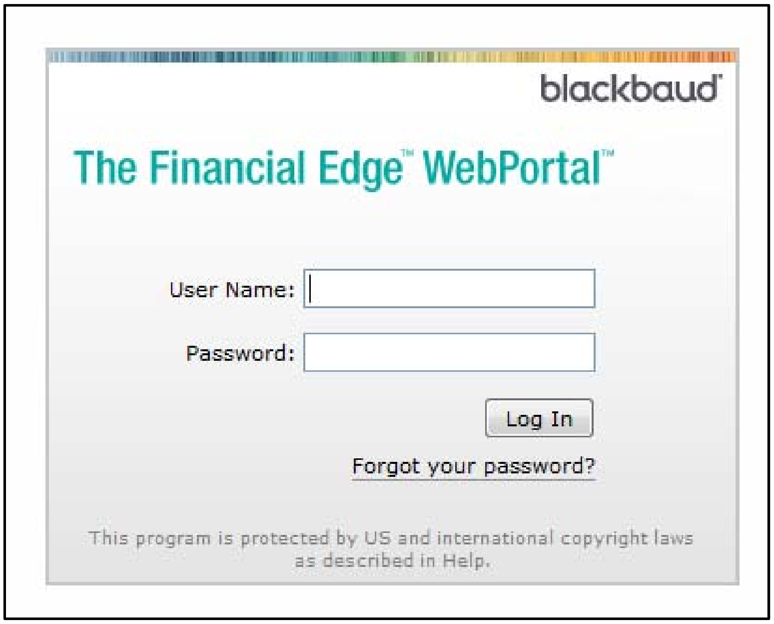
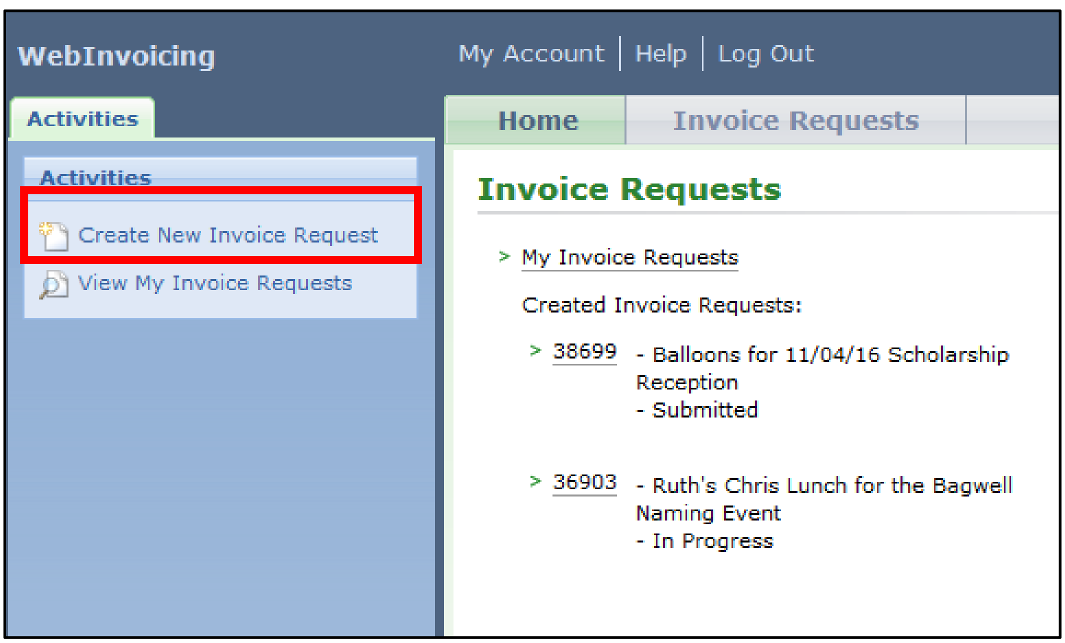
Web Invoice
A Guide to Submitting Requests

1. **Sign In**
   Link: https://fewebinv.kennesaw.edu



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



Note: When creating a request for a vendor, only **one** invoice can be included in each request. However, when submitting for reimbursement, **multiple** receipts can be included in a single request.

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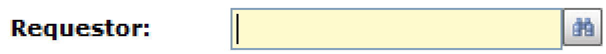
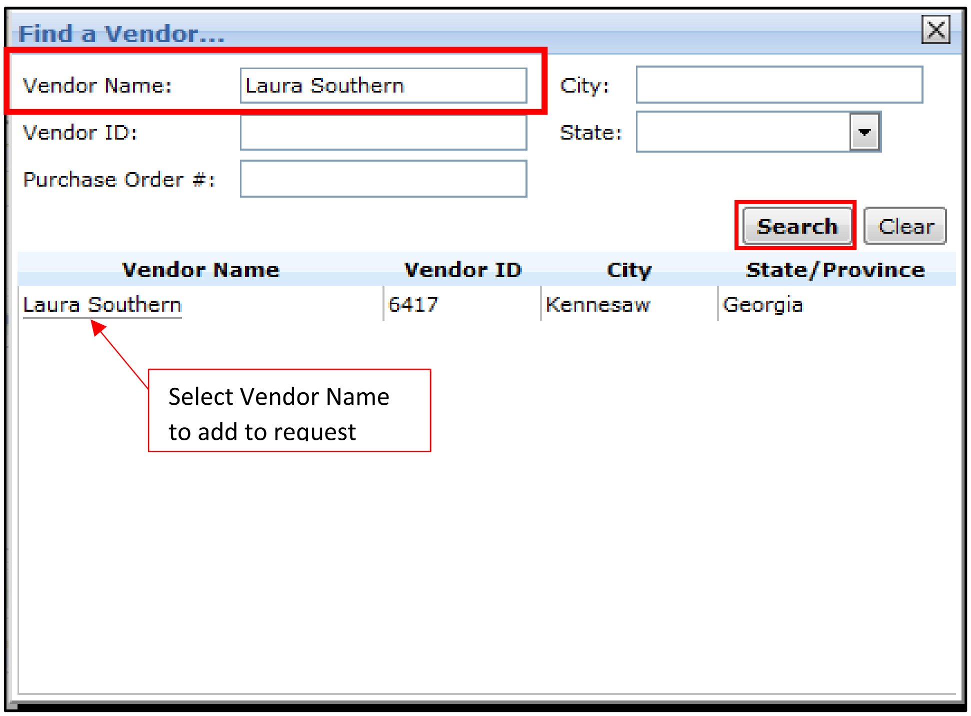
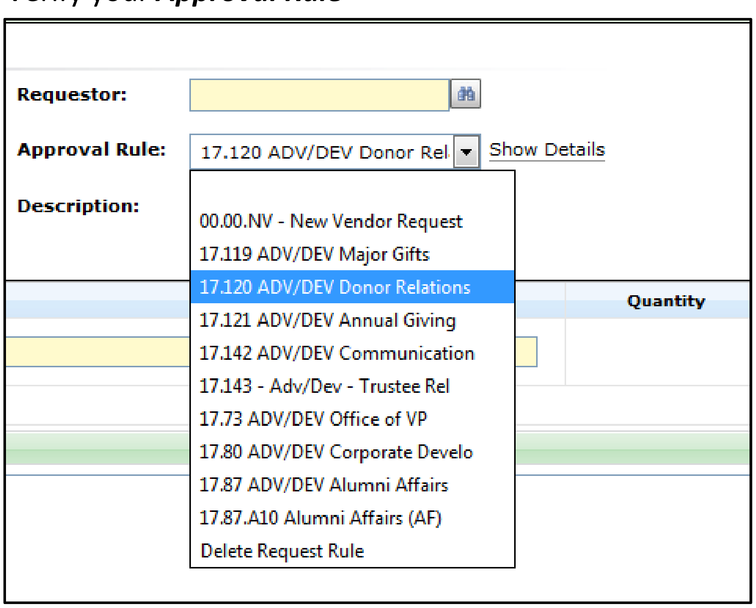
3. **Requestor:**
   a. Select (Search) next to ***Requestor***



   b. Type in the ***Vendor Name***, select ***search*** and then select the vendor to add them to the request



4. **Approval Rule:**
   a. Verify your ***Approval Rule***



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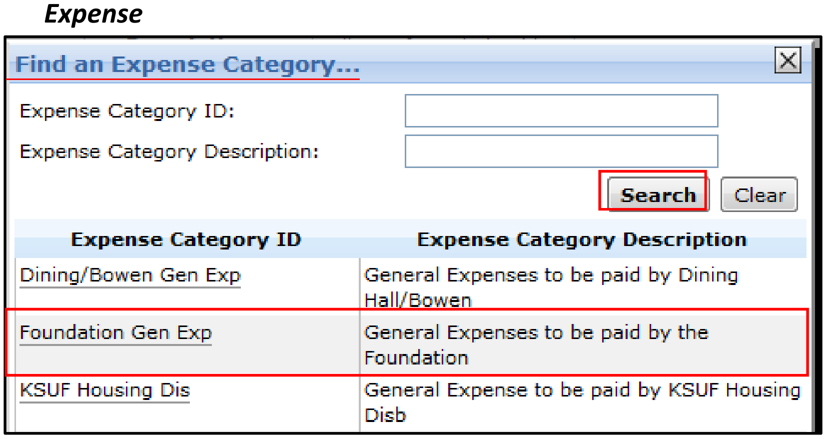
5. **Document Date:**
    a. When the request is made in the **same month** as the invoice date, the **document date** is the **actual invoice date**.
    b. When the request is created using **multiple receipts**, the **document date** is the **latest date.**
    c. When the request is made in a **different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

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

7. **Add Attachments:**
    a. New Vendor: W9 Form
    b. Meetings: Provide agenda and list of attendees
    c. Lectures: Provide a flyer or announcement
    d. Events: Flyer, invite and list of attendees
    e. Original Invoice – Remember the Foundation is not exempt from taxes. Therefore, any invoice submitted for payment must include the Georgia Sales Tax of 6%. Invoices submitted to the Foundation that do not apply Sales Tax should not be processed and are a violation of the State Law.
    f. Food: detailed restaurant receipt

8. **Expense Category:**
    a. Select under ***Expense Category***
    b. Select ***search*** under ***find an expense category*** and then select ***Foundation General Expense***



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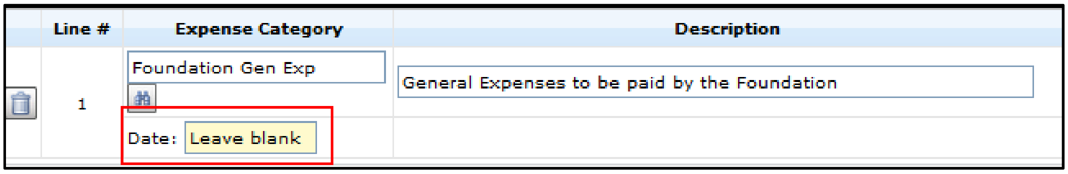
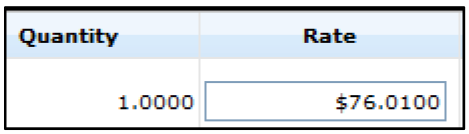
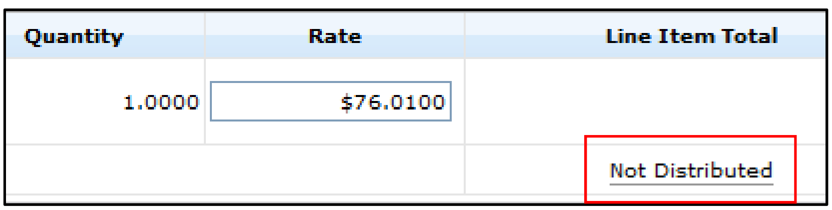
c. Leave ***date*** blank



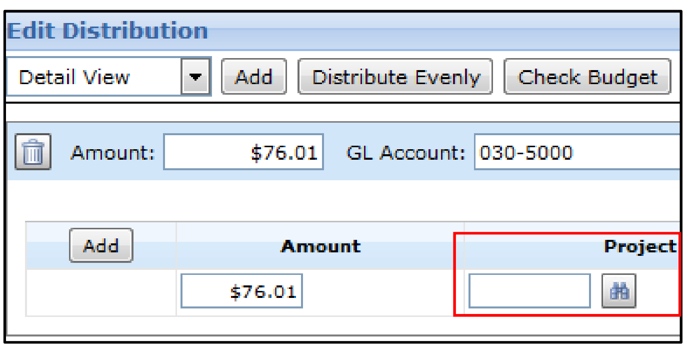
d. Type the total amount in the ***rate*** field



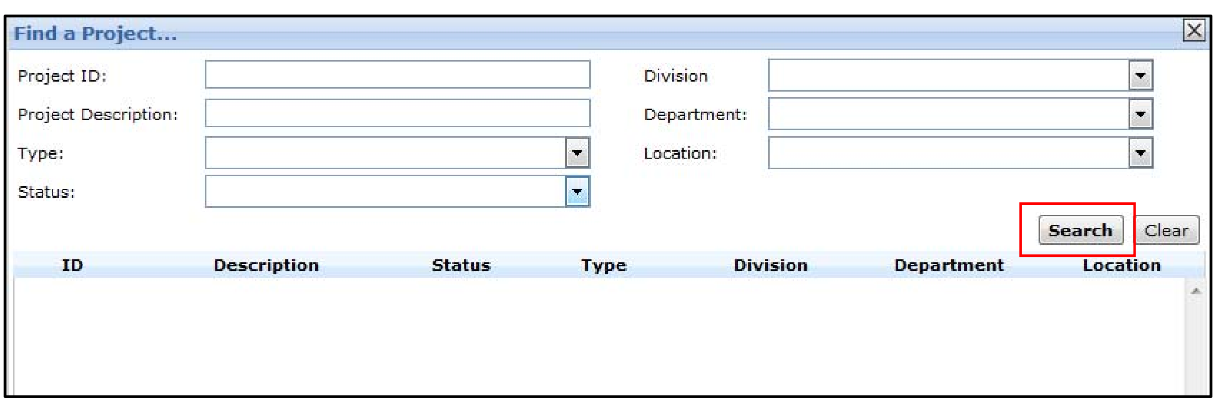
e. Select the ***Not Distributed*** link



f. Select under ***Project***



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.



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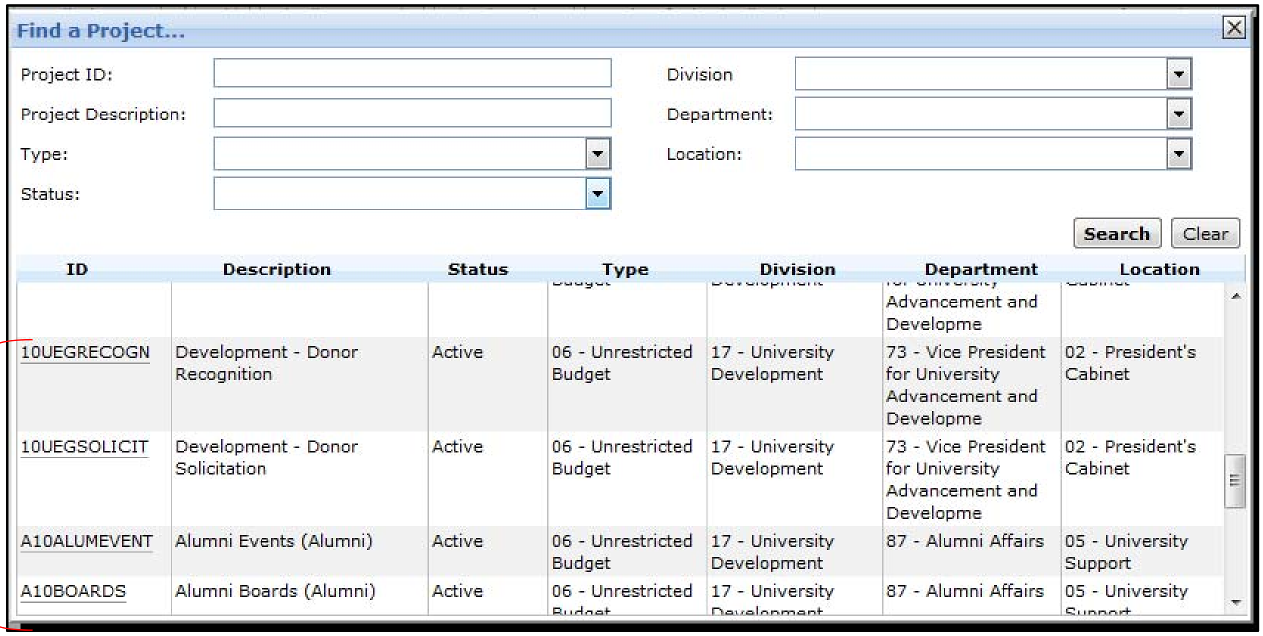
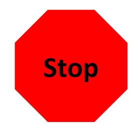
g. Once the list of ***projects*** appears, select the appropriate ***Project ID*** and then select ***OK.***

Select the appropriate ***Project ID***



IMPORTANT: If you are submitting for reimbursement and have multiple receipts allocated to different projects, please see appendix A for different instructions for steps f-g.



9. **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.

10. **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:

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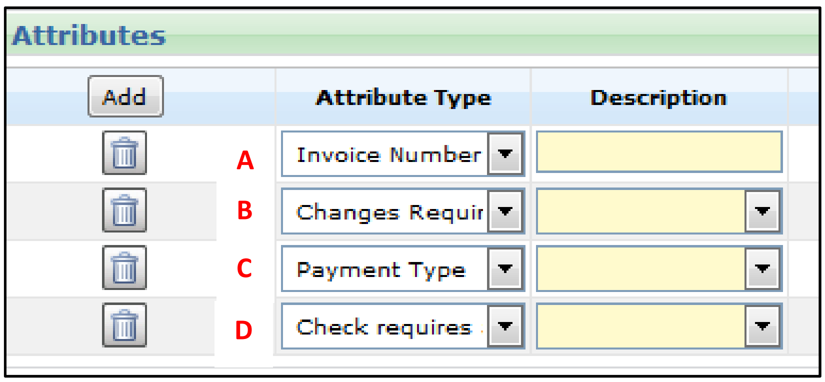
   i. Most of the time, you will select ***no***. In the instance a change of address is submitted with the invoice, you would select ***yes.***

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.***



11. **Final Step**

    a. Submit your request

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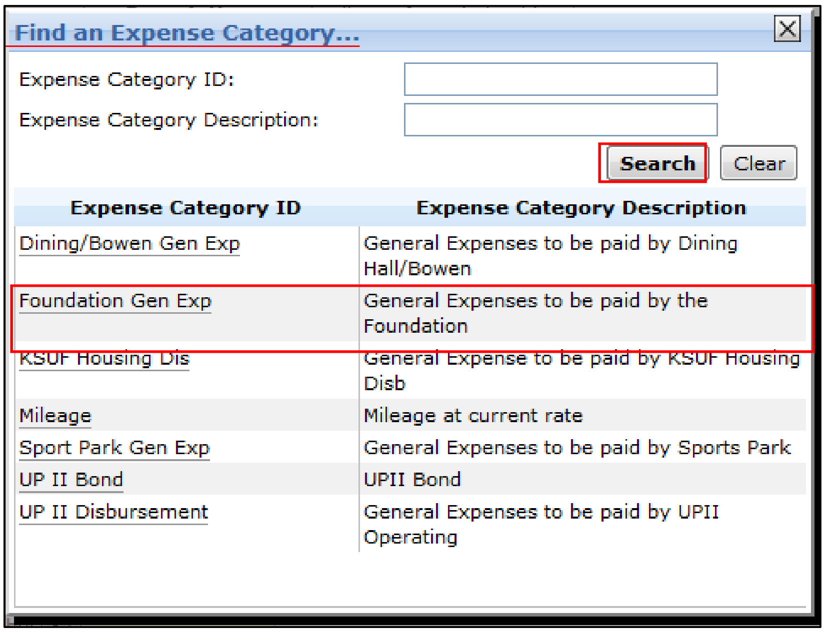
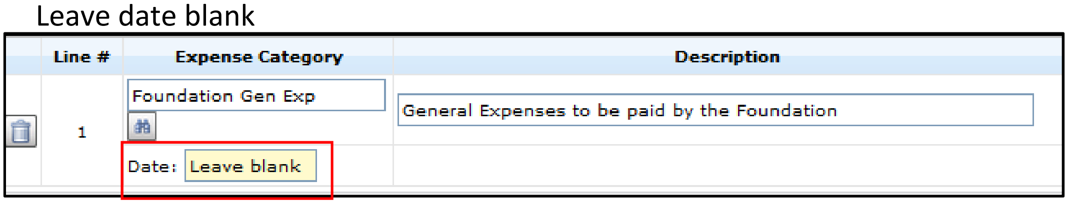
Appendix A – Submitting Multiple Receipts for Reimbursement

Instructions for Submitting a Reimbursement Through Web Invoice with **Multiple Receipts**

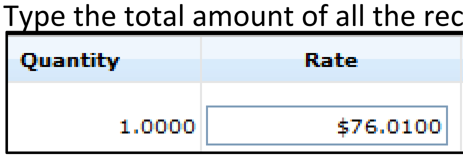
1. Follow steps 1-7 from ***Web Invoicing- A Guide to Submitting Requests***
8. Expense Category:
   a. Select under ***Expense Category***
   b. Select ***search*** under ***find an expense category*** and then select ***Foundation General Expense***



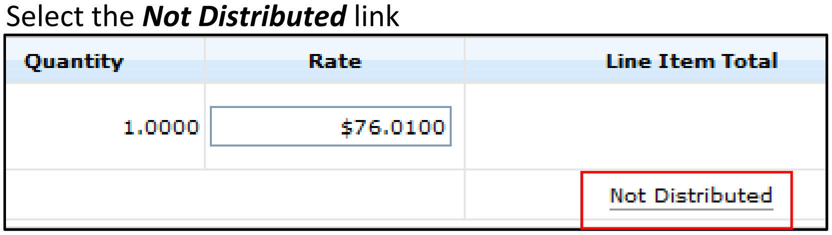
   c. Leave date blank



   d. Type the total amount of all the receipts in the ***rate*** field.



   e. Select the ***Not Distributed*** link



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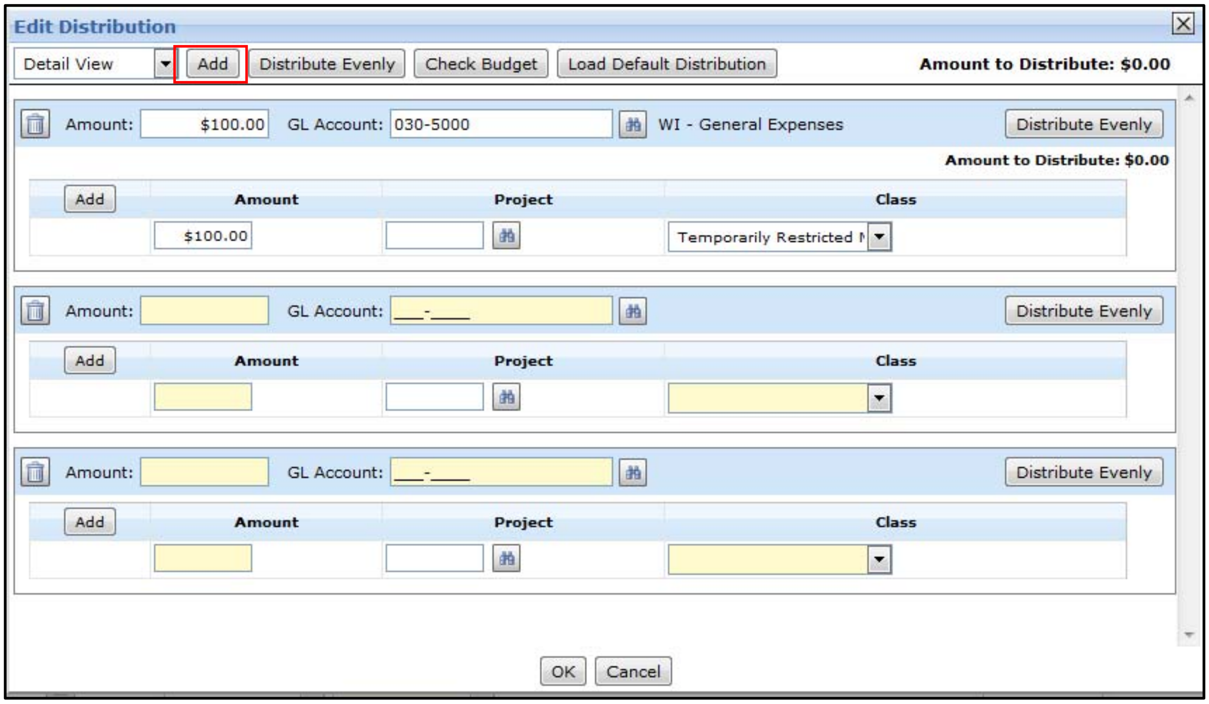
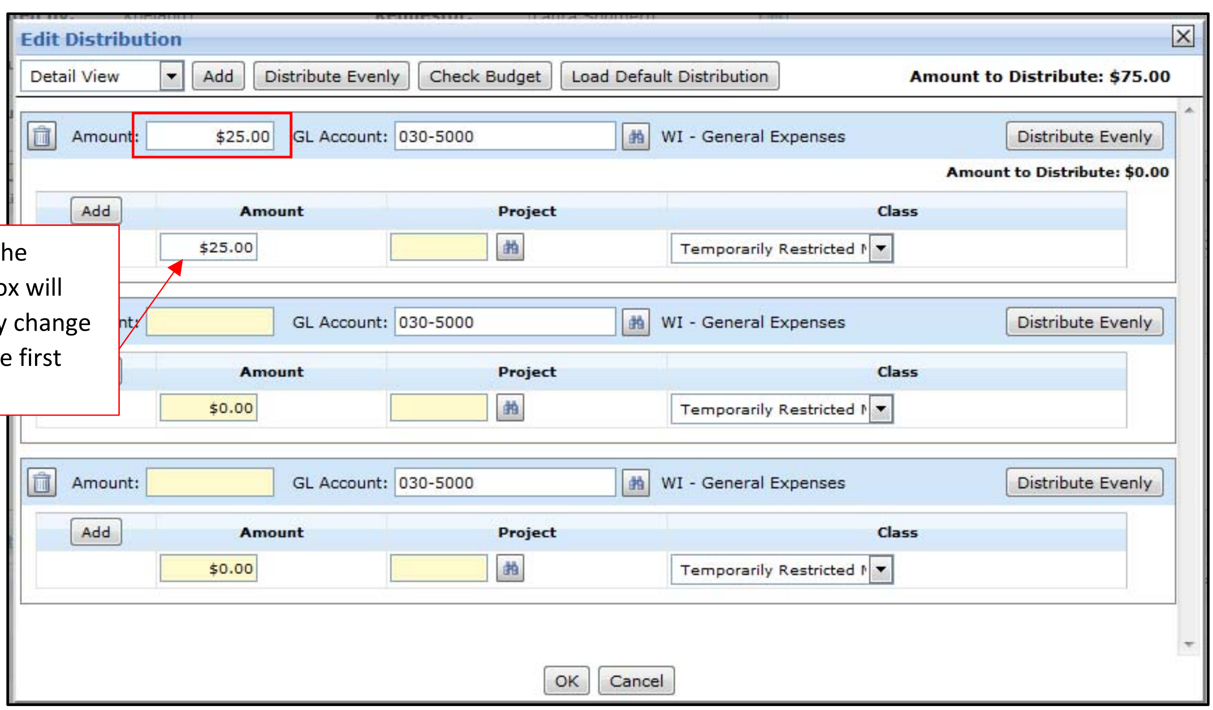
Appendix A – Submitting Multiple Receipts for Reimbursement

f. If there are **multiple receipts** assigned to different projects, select ***Add*** under ***Edit Distribution.*** Continue to select ***Add*** to create a line for each project needing to be entered.



g. In the ***Amount*** box on the first line, enter the total amount associated with your first project. Changing the amount will not affect the ***Line Item Total*** on the first page. Repeat this for each ***added*** line – entering the amount associated with its ***project.*** Additionally, enter the same ***GL Account*** for each line.



Note: Changing the amount in this box will not automatically change the amount in the first line.

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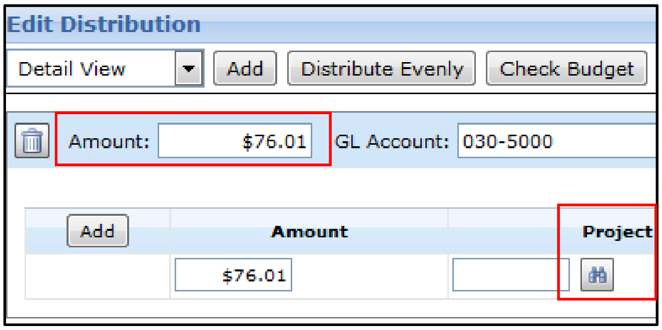
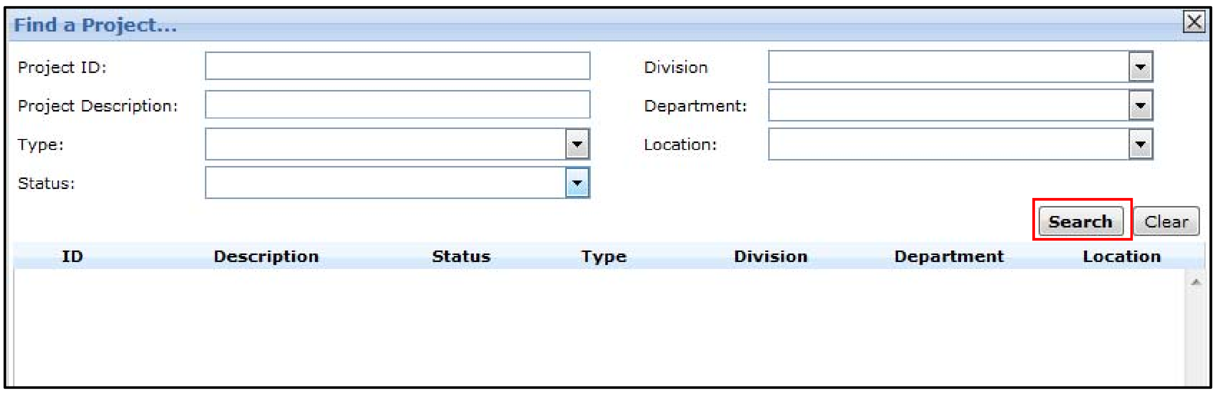
Appendix A – Submitting Multiple Receipts for Reimbursement

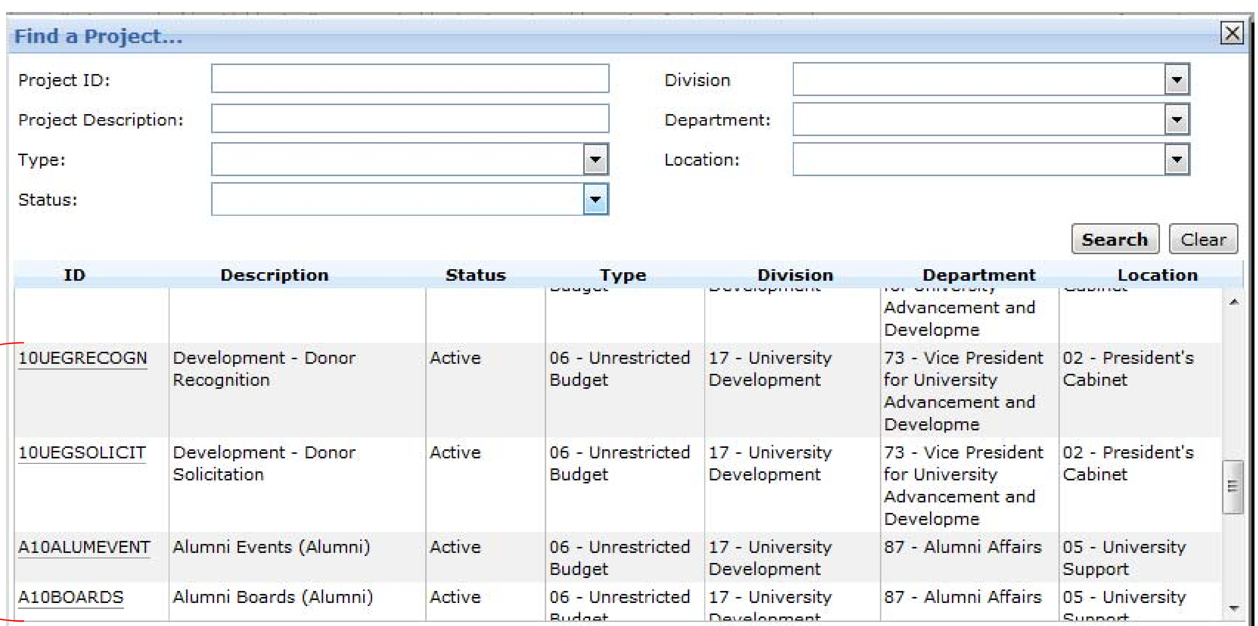
h. Once the ***Amount*** is entered, select  under ***Project***



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.



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



Select the appropriate ***Project ID***

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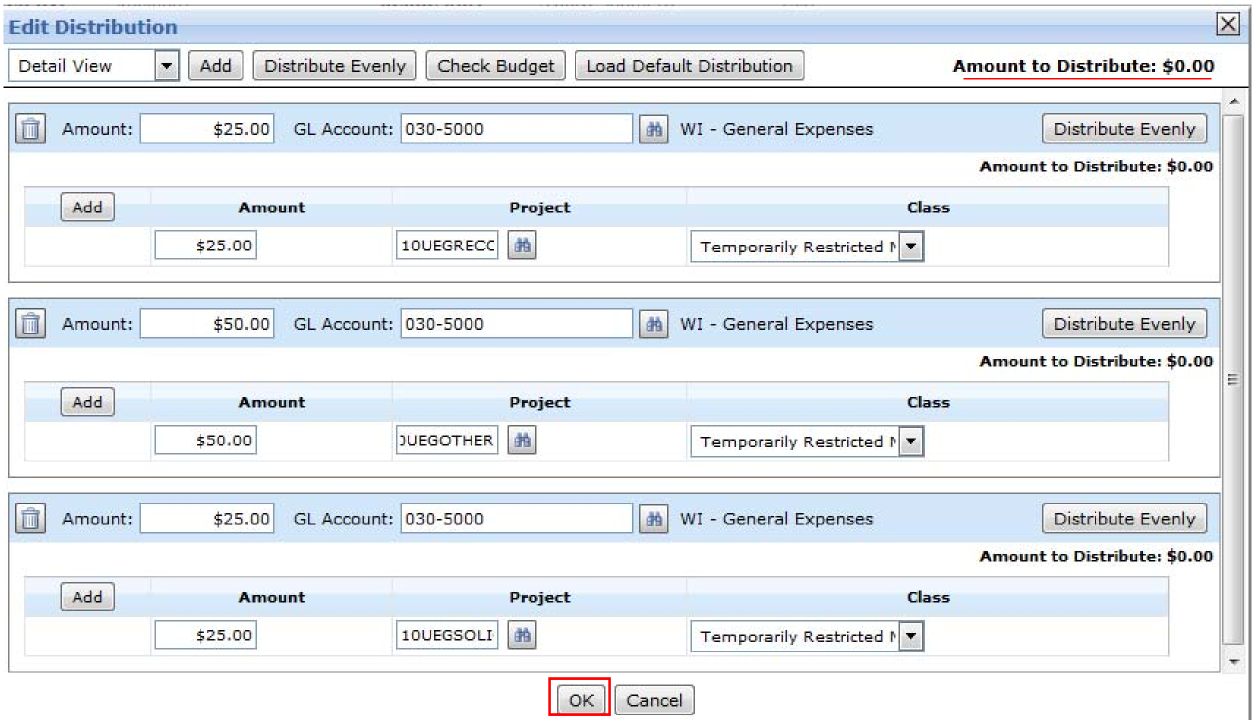
Appendix A – Submitting Multiple Receipts for Reimbursement

j. Once a ***project*** and ***amount*** has been entered for each line, select ***OK.***
   Note: The ***Amount to Distribute*** should equal 0



9. Follow the remaining steps from ***Web Invoicing- A Guide to Submitting Requests*** to complete your request