
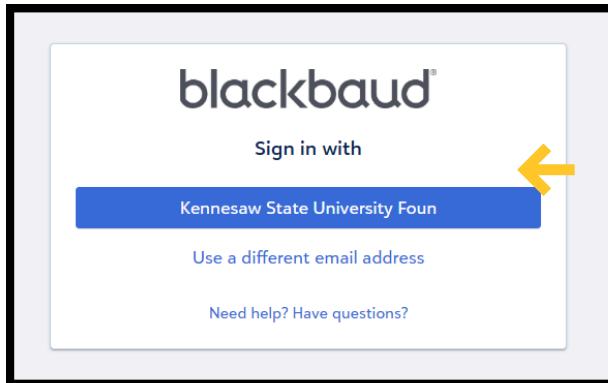




Expense Management Financial Edge NXT How to Login

Login

- New users will receive an invitation from Blackbaud with instructions on how to sign in.
- Go to <https://app.blackbaud.com/signin/> to access the sign-in page.
- Select Kennesaw State University Foundation.
- Log in using your Kennesaw State email address.
- Confirm your login through the Authenticator App.

**KENNESAW STATE
UNIVERSITY**


Sign in with your organizational account

Sign in

Please use your **Kennesaw State University** email address
[Forgot password?](#)

[Need help?](#)

This is a Kennesaw State University information system, the use of which is governed by University System of Georgia and KSU Policies and Procedures. Unauthorized access is prohibited.

**KENNESAW STATE
UNIVERSITY**

For security reasons, we require additional information to verify your account.

Open your Microsoft Authenticator app and tap the number you see below to sign in.

28

...

[Use a different verification option](#)



Expense Management Financial Edge NXT

Invoice Request Submission Guide

Creating a New Request

- Click the **Expenses** tab on the left side of the home screen.
- Under My Invoice Request, select **New Request**

The screenshot displays the Financial Edge NXT interface. On the left, a sidebar contains navigation links: Home, General ledger, Allocations, Budgets, **Expenses** (highlighted with a yellow background and a large black arrow pointing to it), Payables, Treasury, Fixed assets, Analysis, and Settings. The main content area is titled 'Expense management' and is divided into two columns. The left column, 'My credit card transactions', shows 6 Open charges and credits, 1554 Submitted charges, and 0 Rejected charges, with a link to 'Work with my charges'. The right column, 'My invoice requests', features a 'New request' button (highlighted with a yellow background and a large black arrow pointing to it), 1 Open request, 809 Approved requests, and 1 Rejected request, with a link to 'Work with my invoice requests'. Below this, there is an 'Edit my settings' section with an 'Edit settings' button and an email notification section for 'Purchase request notifications' which shows 'None found'.



Expense Management Financial Edge NXT Invoice Request Submission Guide

Add Invoice Request

Complete the highlighted fields:

- **Payee Information:** Auto-populates if the payee is already set up as a vendor with the Foundation. If not, refer to New Vendor Setup.
- **Invoice Number:** Enter the invoice or receipt number. If there are multiple receipts, use the oldest dated transaction for the invoice number (e.g., mmddyyyy).
- **Invoice Date:** If the date on the Invoice falls in the current month, use that date. If it's from the previous month, use the first day of the current month.
- **Description:** Give a brief description of the expense.
- **Approval Rule:** Select the approval rule for the department you intend to use.
- **Expense Detail and Purpose:** Provide a brief explanation of the purchase and the purpose of the event.

Add invoice request

Payee *

Enter or search for Payee



Field is required.

Invoice number

If there is no invoice or receipt number, use the oldest transaction date instead.

Invoice date *

If the invoice date falls in the current month, enter that date. If it's from the previous month, use the first day of the current month.



Description *

Brief description

Approval rule *

Select the approval rule for the department you intend to use



Expense detail and purpose

Detailed description:
Provide a detailed explanation for each expense describing how the expenditure directly benefits the University, college, or department, and how it aligns with the donor's original intent (if applicable).

Approval rule *

Select approval rule

00.00.NV - New Vendor Request
01.02.00.00 BCOE - Deans
02.00.00.00 President's Office
02.01.00.00 - Staff Senate
03.04.00.00 University Events
04.02.170.00 - Ofc of the VP
04.02.171.00 - Ofc of Dev
04.02.172.00 - AAACE
04.02.172.01 - Annual Giving
04.02.174.00 - Adv Services
04.02.176.00 - Adv Bus Ofc
04.02.178.00 - Adv Operations
08.00.00.00 - Com & Marketing
09.00.00.00 - Legal Affairs
13.00.00.00 - VP for Research
14.03.00.00 - Other RE
Delete Request Rule
Foundation
Foundation General



Expense Management

Financial Edge NXT

Invoice Request Submission Guide

Distribution

Complete the highlighted fields:

- **Expense Category:** Select Foundation General Exp from the dropdown menu.
- **Rate:** Enter the total amount of the invoice or reimbursement. Note: Tips are reimbursable up to 20%.
- **Date:** Enter the actual invoice date or, if there are multiple transactions, use the date of the oldest one.
- Confirm that Distributions Displayed is selected.



Distribution

Expense category * Select a value ↓

Description *

Quantity *

Rate * Total Amount

Line item total \$0.00

Date Invoice date 📅

☒ Distributions displayed

Foundation Gen Exp

General Expenses to be paid by the Foundation
030-5000

After you select the expense category, the description and quantity will auto populate.

Distribution

Expense category * Foundation Gen Exp ✕ ↓

Description * General Expenses to be paid by the Fo ↓

Quantity * 1.0000

Rate * \$1.0000

Line item total \$1.00

... More ↓

Line	Account	Debit	Split	Project	Class	University Impact Code	College Impact Code
1	030-5000 - WI - General Exp...	\$1.00		Select Project	With Donor Restrictions		



- **Account:** All departments use 030-5000
- **Project:** Select the project code for the department you intend to use.

Find in this list

10ADV-BUSOFF
Advancement Business Office

10AGIV-GENRL
Annual Giving - General



Expense Management Financial Edge NXT Invoice Request Submission Guide

Custom Fields

Complete the highlighted fields:

- **Value:** Enter the invoice or receipt number.
- **Date:** If the receipt date is from a prior month, enter the first day of the current month. Ensure this matches the date entered under distributions.
- **Payment Type:** Select either, Check – Mail to Vendor, or Check - Hold for Pickup.

Custom fields

Field	Value *	Date	Comment
Invoice Number	<input type="text" value="Text value"/>	<input type="text" value="Date"/> <small>Use the format MM/DD/YYYY.</small>	<input type="text" value="Comment"/>
Changes Required to Vendor Record	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="Date"/> <small>Use the format MM/DD/YYYY.</small>	<input type="text" value="Comment"/>
Payment Type	<input type="text" value="-- Select value -- -- Select value --"/>	<input type="text" value="Date"/> <small>Use the format MM/DD/YYYY.</small>	<input type="text" value="Comment"/>
Check requires a Remittance Advice	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="Date"/> <small>Use the format MM/DD/YYYY.</small>	<input type="text" value="Comment"/>

+ Add another custom field

Receipts *

Drag a file here
or click to browse

↑

-- Select value --
Check - Mail to Vendor
Check - Hold for Pick-up
Bank Draft - Wire
Bank Draft - Other
Credit Memo
Requisition to trustee
Credit Card

Link to a file

Done



Expense Management Financial Edge NXT

Invoice Request Submission Guide

Attachments

Combine all documents into a single PDF before uploading. Photos or screenshots in JPG, PNG, or any other image format are not acceptable

- **Receipts:** Upload the following based on the payment or reimbursement type:
 - Receipts/Invoices: Scanned copies of the detailed, itemized receipt showing the total transaction (including a tip of 20% or less), or a detailed vendor invoice with sales tax included.
 - Reimbursements: If the cardholder's name is not on the receipt, provide either:
 - A photo of the card showing only the name and last four digits, OR
 - A bank statement showing only the relevant transaction(s), cardholder's name, and last four digits.
- **Events/Meetings:** Attach an agenda, itinerary, brochure, calendar invite, or announcement that shows the purpose and details of the activity.
- **Attendee List:** Include all attendees and indicate their relationship to KSU (e.g., Faculty, Staff, Student, Donor, Board Member, Consultant). You may also provide an email invitation listing all recipients or a calendar invite showing the invited guests
- **Vendor Agreements:** Provide a copy of any agreement or contract between the University and an outside vendor for goods or services rendered.
- **Brand Approval:** Include documentation for items featuring the KSU logo.
- **How to Upload:** Click "Drag a file here or click to browse" to upload your PDF.

[+ Add another custom field](#)

Receipts *



Drag a file here
or click to browse



[Link to a file](#)

Done

- **Click Submit**

Submit

Save draft

Cancel

\$0.00

Distributed

\$0.00

Remaining

\$0.00

Transaction amount