
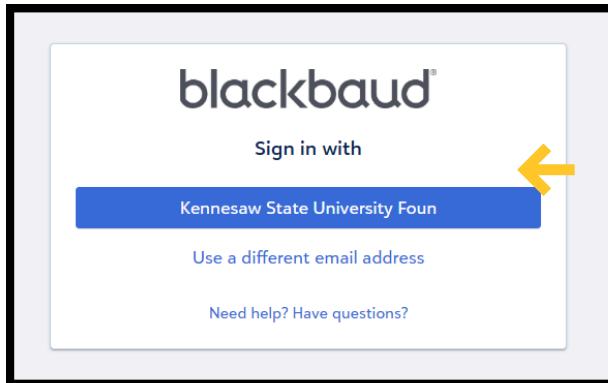




## Expense Management Financial Edge NXT How to Login

### 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.

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...

[Use a different verification option](#)



# Expense Management Financial Edge NXT New Vendor Request

## 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 large black arrow), 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 large black arrow), 1 Open request, 809 Approved requests, and 1 Rejected request, with a link to 'Work with my invoice requests'. Below this, an 'Edit my settings' section includes an 'Edit settings' button and an email notification status for 'Purchase request notifications' which is 'None found'.



## Expense Management Financial Edge NXT New Vendor Request

### Add Invoice Request

Complete the highlighted fields:

- **Payee Information:** Enter and select \*\*\*NEW VENDOR\*\*\* - 5453
- **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).
- **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:** Enter and select 00.00.NV - New Vendor Request
- **Expense Detail and Purpose:** Provide a brief explanation of the purchase and the purpose of the event.

#### Add invoice request

Payee *	Payee *
<input type="text" value="Enter or search for Payee"/>	<div>***NEW VENDOR*** ***NEW VENDOR*** - 5453</div>
⚠ Field is required.	
Invoice number	Invoice date *
<input type="text" value="If there is no invoice or receipt number, use the oldest transaction date instead."/>	<input type="text" value="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 *	
<input type="text" value="Brief description"/>	
Approval rule *	Approval rule *
<input type="text" value="00.00.NV - New Vendor Request"/>	<div>Select approval rule 00.00.NV - New Vendor Request</div>
Expense detail and purpose	
<input type="text" value="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)."/>	



# Expense Management

## Financial Edge NXT

### New Vendor Request

#### 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 \*  Description \*  Quantity \*  Rate \*  Line item total \$0.00 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 \*  Description \*  Quantity \*  Rate \*  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	<input type="checkbox"/>	Select Project	With Donor Restrictions		

Find in this list

- 10ADV-BUSOFF  
Advancement Business Office
- 10AGIV-GENRL  
Annual Giving - General
- 10ANLRETREAT  
Foundation Annual Retreat
- 10ANNLDINNER  
Annual Dinner

- **Account:** All departments should use 030-5000.
- **Project:** Enter your department's project ID.



# Expense Management

## Financial Edge NXT


### New Vendor Request

## 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.
- **Changes Required to Vendor Record:** Select Yes.
- **Date:** Enter current date
- **Comment:** Type New Vendor
- **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 checked="" type="radio"/> Yes  <input type="radio"/> No	<input type="text" value="Date"/> <small>Use the format MM/DD/YYYY.</small>	<input type="text" value="New Vendor"/>
Payment Type	<input type="text" 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 New Vendor Request

### Attachments

- **Attachment name:** Provide the vendor's W-9 in PDF format, uploaded separately.
- **Attachment type:** Select W-9

**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, 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.
- **Click Submit**

Drag a file here  
or click to browse

irs-form-w9.pdf  
(89 KB)

Word  
Excel  
PowerPoint  
Adobe  
Scanned Image  
W-9  
W-9

Submit Save draft Cancel

\$0.00 \$0.00 \$0.00  
Distributed Remaining Transaction amount



# Expense Management Financial Edge NXT

## New Vendor Request - Rejected

### Notifications to keep you updated on your submissions.

- Under Edit my settings, select **Edit settings**

Financial Edge NXT

Kennesaw State University Foundation

Expense management

My credit card transactions

- 6 Open charges and credits
- 1554 Submitted charges
- 0 Rejected charges
- Work with my charges

My invoice requests

- New request
- 1 Open
- 809 Approved
- 1 Rejected
- Work with my invoice requests

Edit my settings

- Edit settings
- Email
- Purchase request notifications



# Expense Management Financial Edge NXT

## New Vendor Request - Rejected

### Edit my settings

Complete the highlighted fields:

- **Invoice request notifications:** Check the Active box
- **Frequency:** Select Instantly. You'll receive an email notification when your New Vendor Request submission is rejected.

#### Edit my settings

Email \*

Invoice request - Default approval rule

Purchase request - Default approval rule

Distribution

... More ▾

Line	Account	Percent	Split	Project

#### Credit card notifications

Select which notifications you want to receive and how frequently.

Active	Notification	Frequency
<input checked="" type="checkbox"/>	Credit card charge received final approval	Weekly
<input checked="" type="checkbox"/>	Credit card charge rejected	Instantly

#### Invoice request notifications

Select which notifications you want to receive and how frequently.

Active	Notification	Frequency
<input checked="" type="checkbox"/>	Invoice request received final approval	Weekly
<input checked="" type="checkbox"/>	Invoice request rejected	Instantly







# Expense Management Financial Edge NXT

## New Vendor Request - Rejected

### Rejected

- After you receive the email about the rejected submission, click the link in the email to access the expense.
- Click the **Expenses tab** on the left side of the home screen.
- Under My Invoice Request, select **Rejected**

Financial Edge NXT

Home

General ledger

Allocations

Budgets

**Expenses**

Payables

Treasury

Fixed assets

Analysis

Settings

Expense management

My credit card transactions

6 Open charges and credits

1554 Submitted charges

0 Rejected charges

Work with my charges

My invoice requests

New request

1 Open

809 Approved

1 Rejected

Work with my invoice requests

Edit my settings

Edit settings

Email

Purchase request notifications



# Expense Management

## Financial Edge NXT

### New Vendor Request - Rejected


## Rejected


Change the highlighted fields:

- **Payee Information:** Change the Payee name to the new vendor.
- **Approval Rule:** Update the approval rule to the department you intend to use.

### Add invoice request

Payee \*


 Field is required.

Invoice number

Invoice date \*

Description \*

Approval rule \* 



# Expense Management

## Financial Edge NXT

### New Vendor Request

#### Custom Fields

- **Changes Required to Vendor Record:**
  - **Change to:** No
- **Date:** Remove the date
- **Comment:** Delete the comment
- **Click Submit**

#### Custom fields

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

[+ Add another custom field](#)

#### Receipts \*

<div>Drag a file here or click to browse</div> <div>↑</div>	<div>Link to a file</div> <div><input type="text"/></div> <div>Done</div>
---	---



<b>Submit</b>	Save draft	Cancel	\$0.00 Distributed	\$0.00 Remaining	\$0.00 Transaction amount
---------------	------------	--------	-----------------------	---------------------	------------------------------