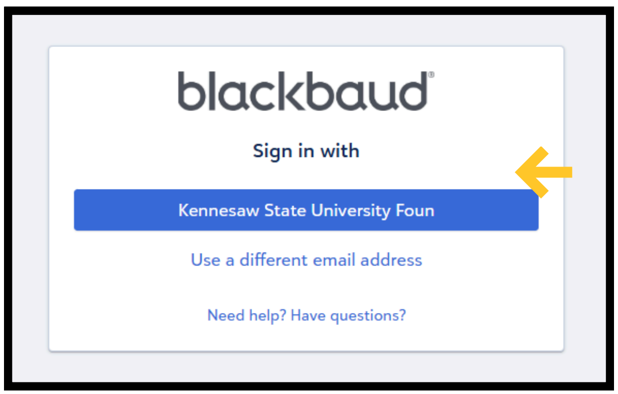
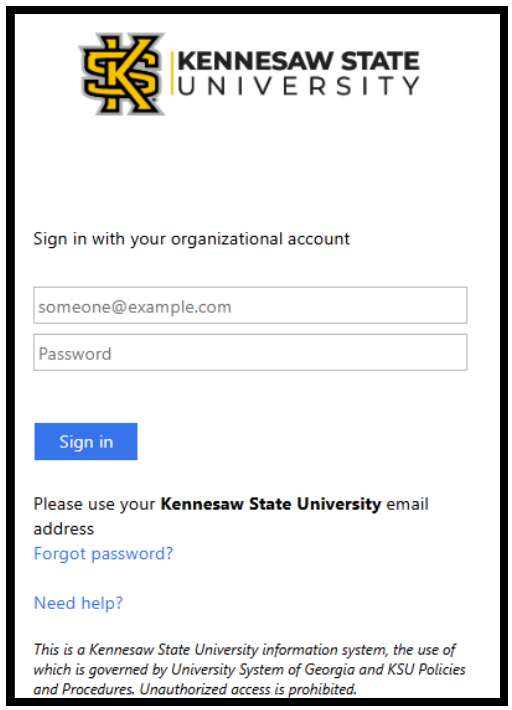
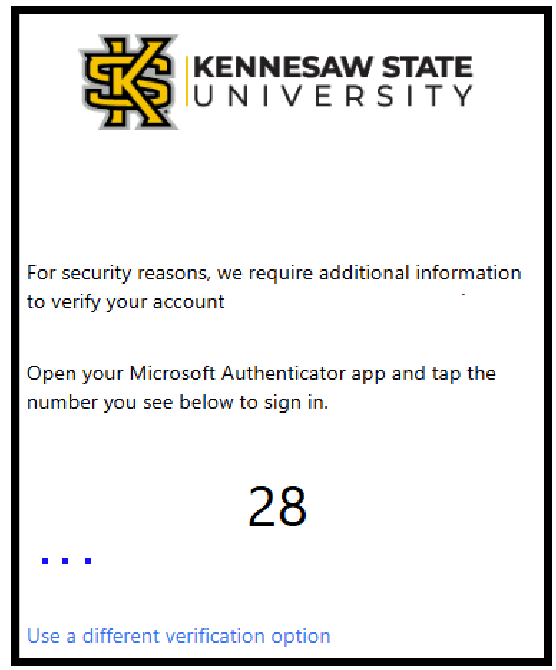
Expense Management
Financial Edge NXT
How to Login

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.



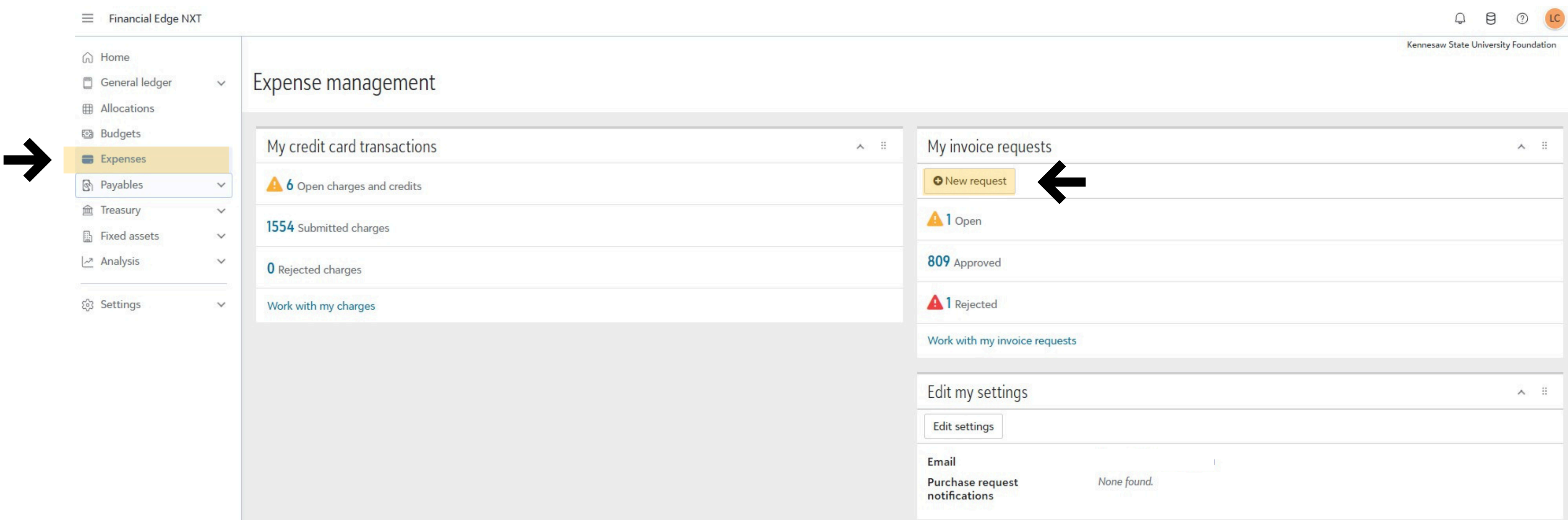




Expense Management
Financial Edge NXT
New Vendor Request

Creating a New Request

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



Expense Management
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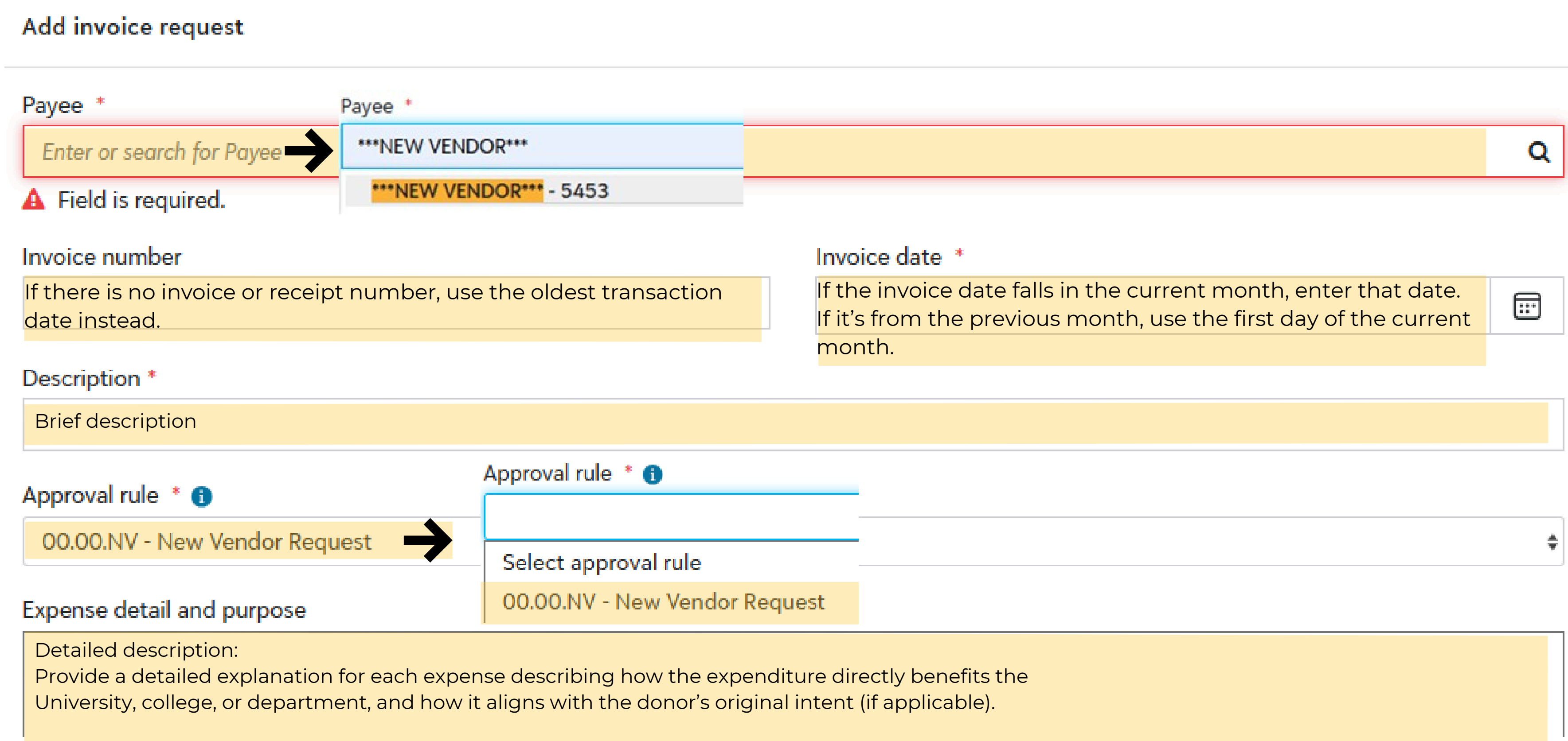
New Vendor Request

Add Invoice Request

Complete the highlighted fields:

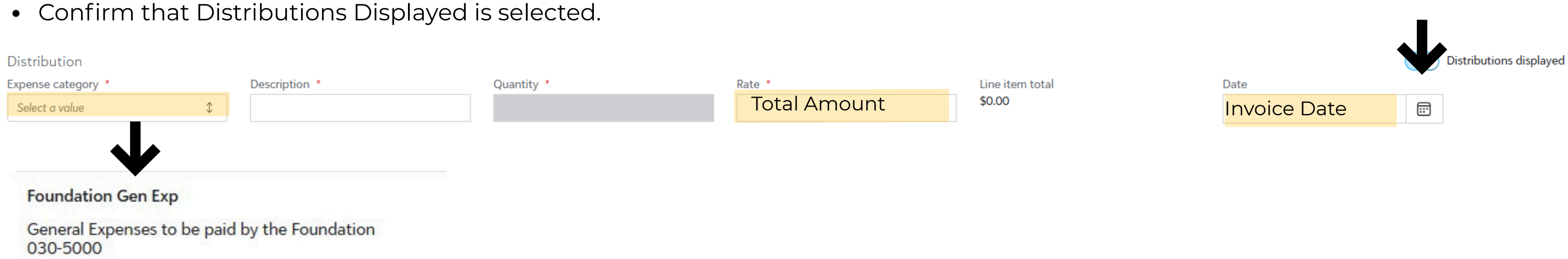
- **Payee Information:** Enter and select ***NEW VENDOR*** - 5453
- **Invoice Number:** Enter the invoice or receipt number. If there are multiple receipts, use the oldest dated transaction for the invoice number (e.g., mmddyyyy).
- **Date:** If the date on the Invoice falls in the current month, use 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.



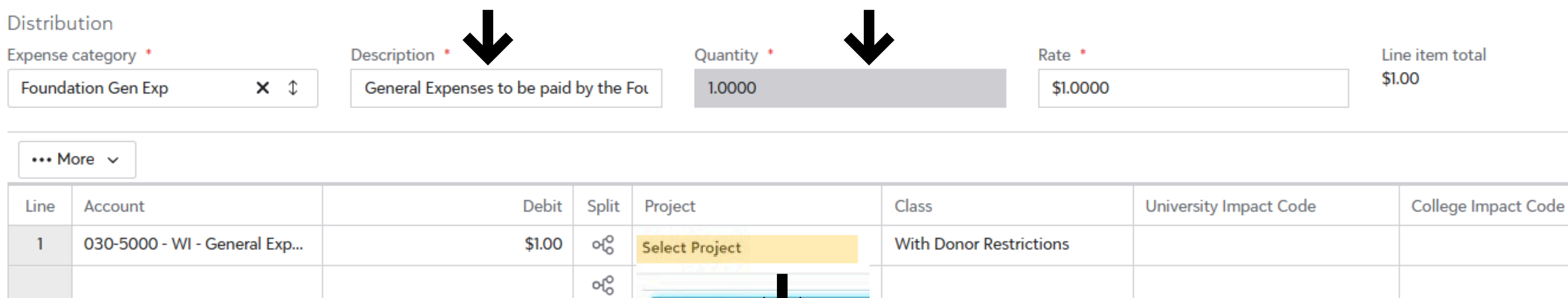
Distribution

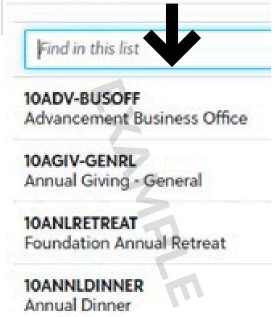
Complete the highlighted fields:

- **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.



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





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

Expense Management
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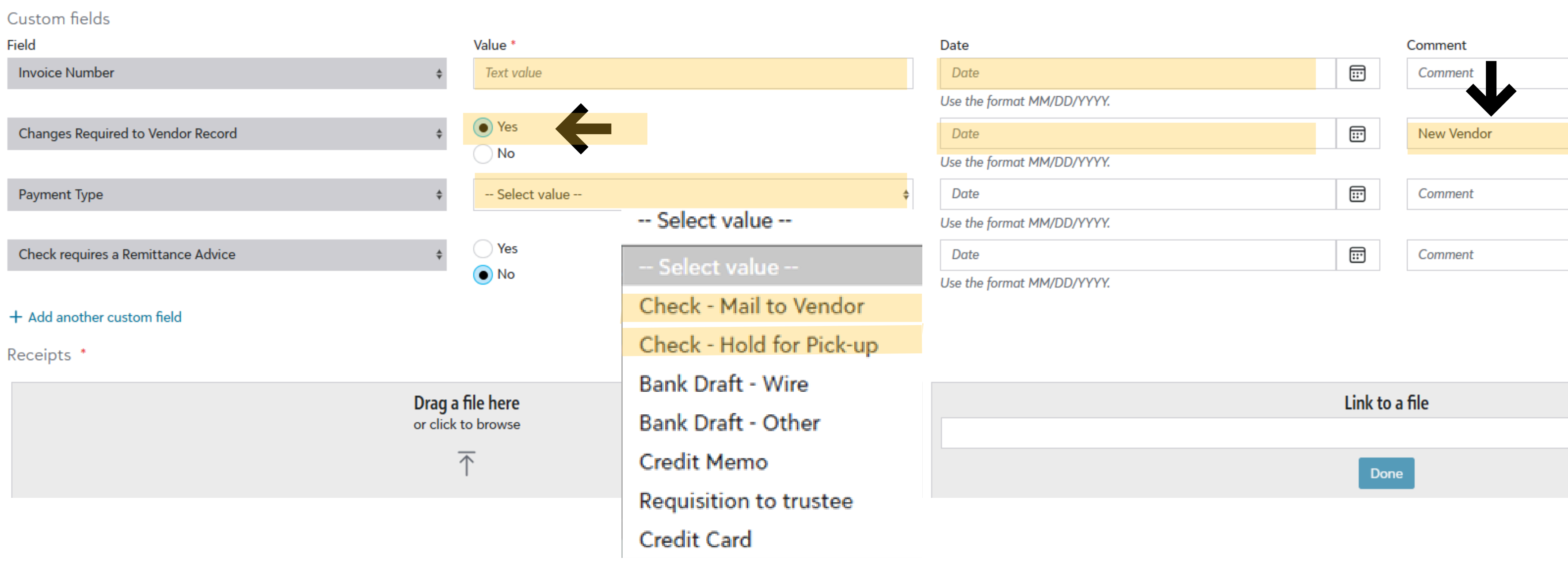
New Vendor Request

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.

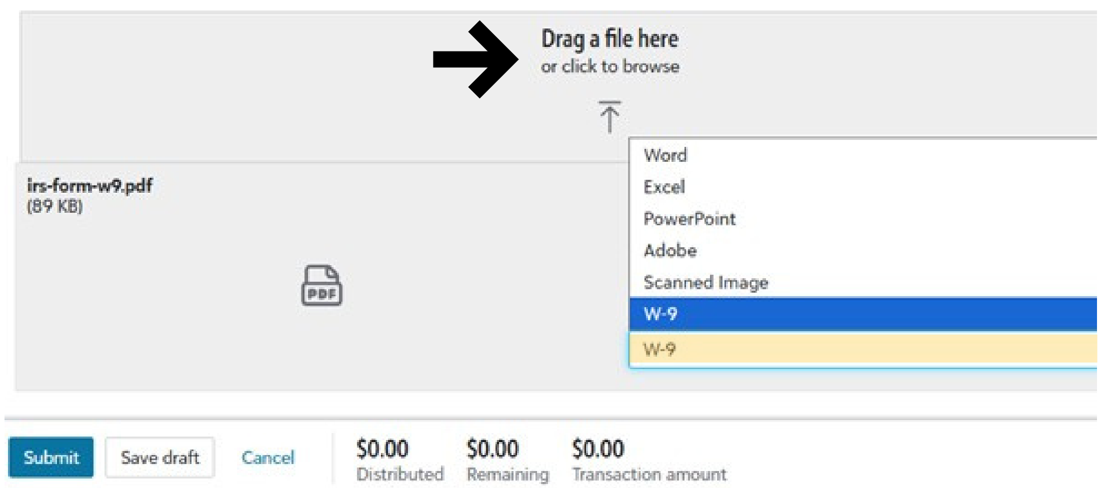


Attachments

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

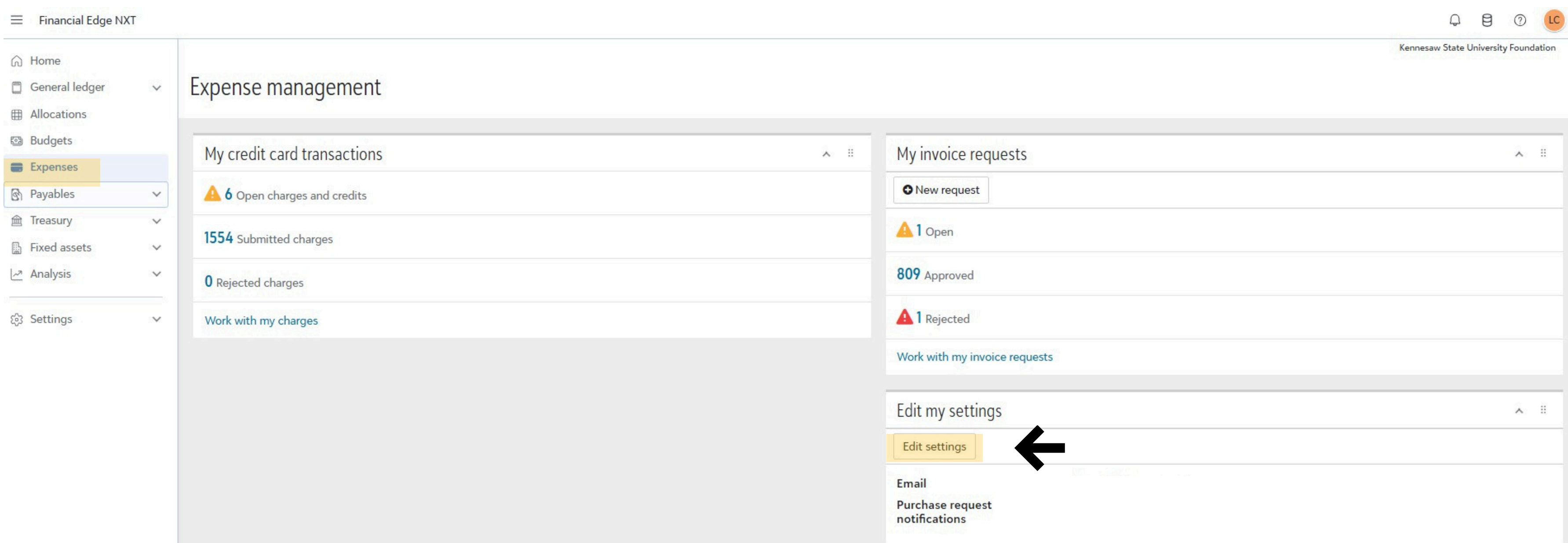
Combine all documents into a single PDF before uploading. Photos or screenshots in JPG, PNG, or any other image format are not acceptable.

- **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**



Notifications to keep you updated on your submissions.

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



Expense Management
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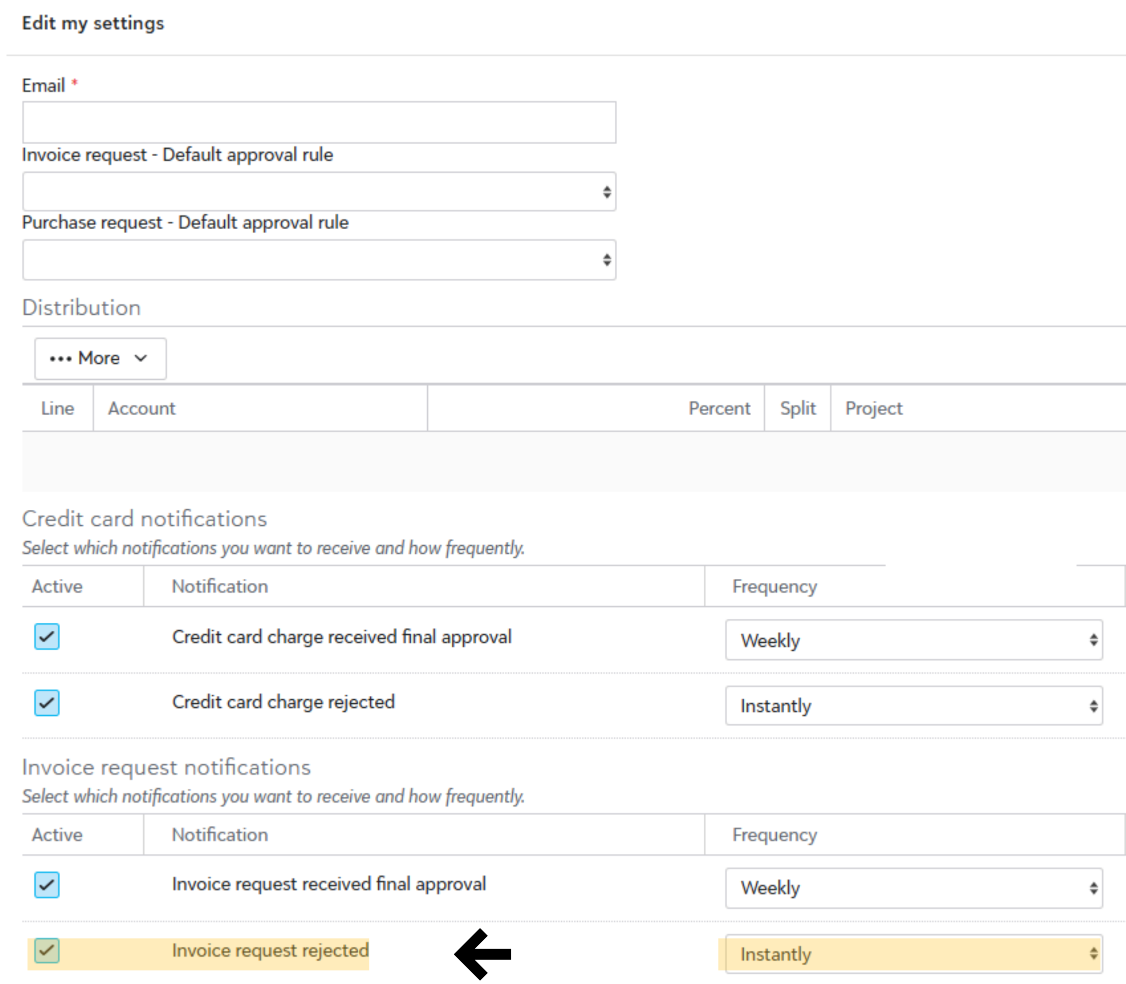
New Vendor Request - Rejected

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.



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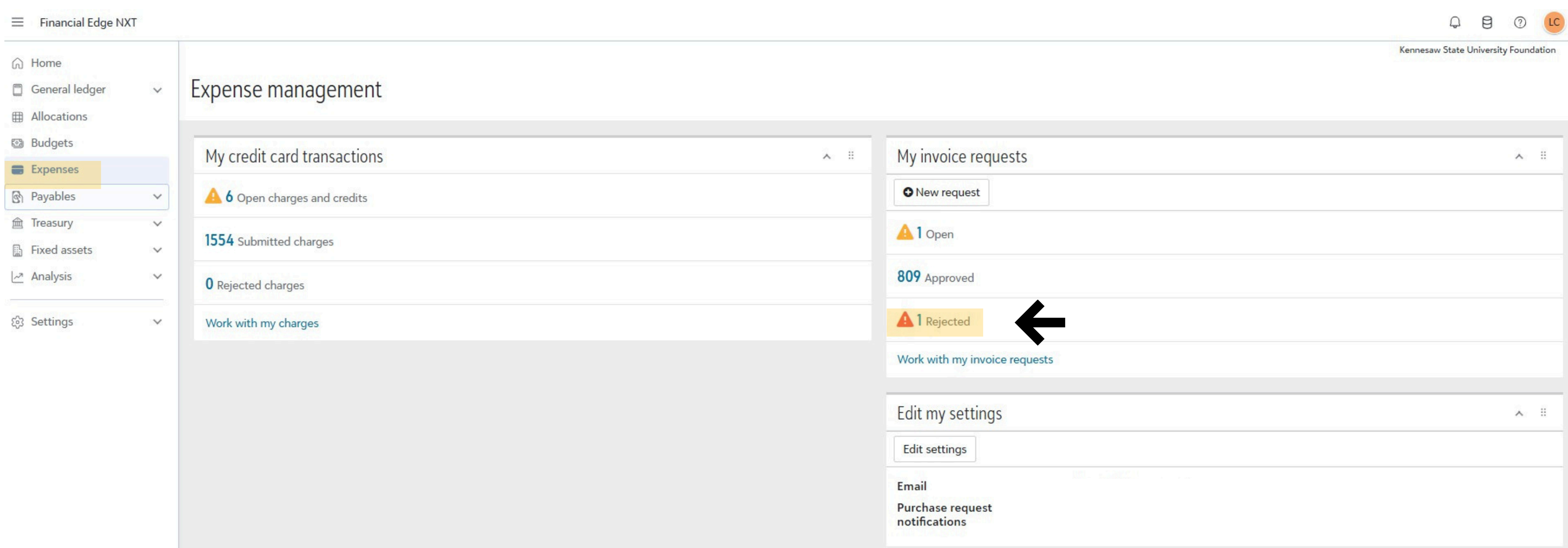
New Vendor Request - Rejected

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**



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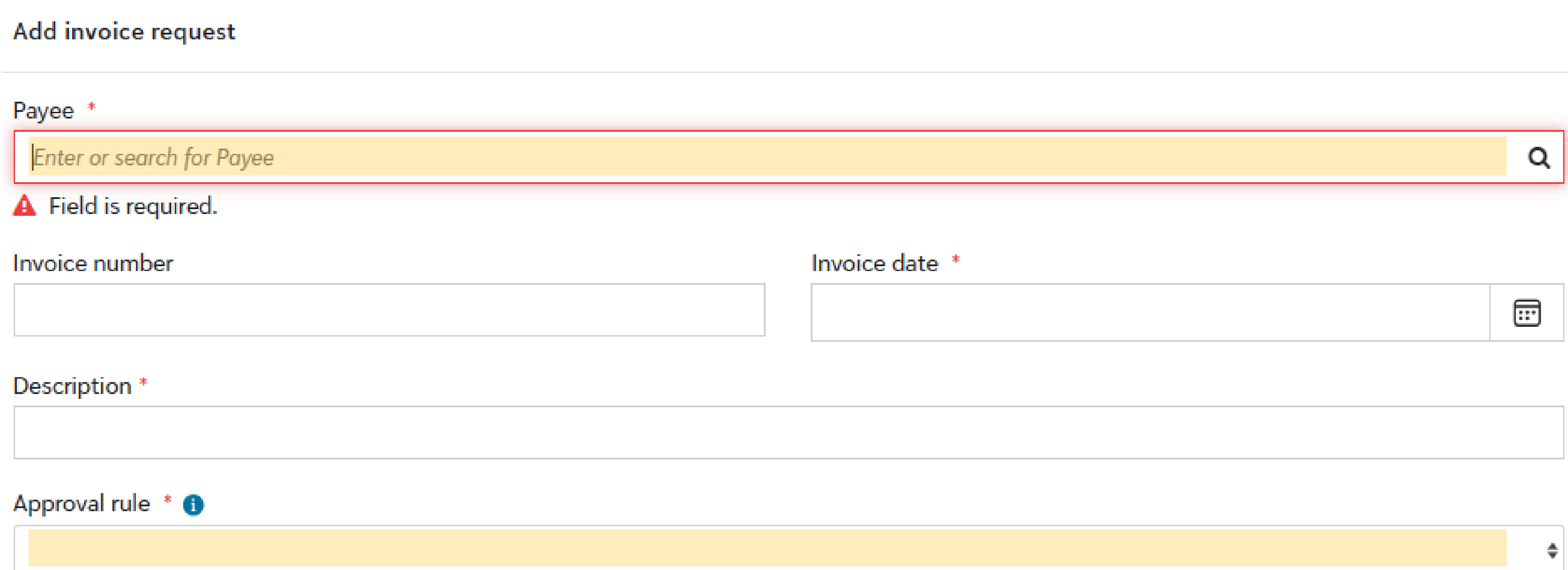
New Vendor Request - Rejected

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.



Custom Fields

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