From the Financial Edge NXT home screen, hover over **Expenses** and click on **manage expenses**.

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|---|---------------------------|
| Arge Control Logie NXT Home General Jedger * Expenses * Psyables * Treasury * Reporting Analysis * Control panel * | the University Foundation |
| Welcome to Financial Edge NXT! Settings | |
| EFT Resources | |
| To get the most out of EFT, we suggest you get familiar with all the EFT resources available to you. | |
| Financial Edge NXT Customer Success Resources | |
| Oreck out the product adoption videos Customer Success has for Financial Edge NXT. New videos added monthly/ Blackbaud Customer Success appartnew escausers | |
| Electronic Funds Transfer (Video) | |
| Watch this video for an overview of the EFT process in Financial Edge NKT. | |
| New Blackbaud Marketplace applications for Financial Edge NXT Backbaud Marketplace 02/01/2021 | |
| Learn about new apps that aim to help with budgeting, automation, and fund allocations. | |
| Upgrade Your Training Subscription Online | |
| man there there are improved and the instruments in the instruction of the instruction of the instruction led CPE eligible courses. | - |

Under My invoice requests, click on New request to enter requests.

| D Financial Edge NXT × + | | | | | – ø × |
|--|------------------|--|---|--|----------------------------|
| ← → C 🔒 fenxt.blackbaud.com/expenses/workcenter?svcid=fenxt&envid=p-HxIMs0CiQkyRIpJELFYYUg&tenantid=5ec78e4b-2e | 16-4c7e-a510-6 | 7ac0b704bd8 | | | 🖈 🕕 E |
| 🔢 Apps 💿 Blackbaud - Sign in 🏮 Office of the KSU F 🌼 Campus Directory 🏦 USG Faculty and St 🗅 Optum 🔲 Formstack 🔲 G | Charge Back Form | 🗱 Campus Intranet 🛛 💿 Raiser's Edge NXT | 🏦 PeopleSoft 🔤 My Sling TV | @ Payment Express Seattle Blackboard Reporti | >> 📰 Reading list |
| Einancial Edge NXT Home General ledger * Expenses * Payables * Treasury * Reporting | Analysis 🔻 | Control panel 🔻 | | Kennesaw S | tate University Foundation |
| Expense management | | | | | |
| My credit card transactions | ~ = | My invoice requests | | | ~ = |
| In order to see card activity, your credit cards must be connected to Financial Edge NXT. | | New request A 1 Open | | | |
| My approvals | ^ II | 44 Approved | | | |
| 0 Pending charges | | Work with my invoice requests | | | |
| A 1 Pending request | | My settings | | | ~ 11 |
| | | Edit | | | |
| | | Email Invoice request notifications Out of office forwarding | lharr187@kennesaw.edu Requires my approval Disabled | Instantly | |
| | | | | | |
| | | | | | |
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Fill in the Payee information

| Financial Edge NXT | × + | | | | | | | | | | | | – ø × |
|------------------------------|------------------|---------------------------|-----------------------|----------------|-----------------------|--------------|-------------------|-------------------|-------------|----------------|--------------------|--------------------|------------------|
| ← → C 🔒 fenxt.blackba | aud.com/expense | s/workcenter?svcid=fenxt& | envid=p-HxIMs0CiQkyR | lpJELFYYUg&ten | antid=5ec78e4b-2e16-4 | 4c7e-a510-67 | ac0b704bd8 | | | | | | ☆ 🕕 E |
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| Add invoice request | | | | | | | | | | | | | Θ× |
| Payee * | | | | | | _ | | | | | | | |
| Enter or search for a Payee | | | | | | ٩ | | | | | | | |
| Field is required | | | | | | _ | | | | | | | |
| Invoice number | Invoice dat | e * | | | | | | | | | | | |
| | MM/dd/yy | /// 🛍 | | | | | | | | | | | |
| Description * | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Approval rule * | | | | | | | | | | | | | |
| Approvariate | | | | | × 0 | | | | | | | | |
| | | | | | | | | | | | | | |
| Expense detail/purpose | | | | | | | | | | | | | |
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| Distribution | | | | | | | | | | | | | |
| Expense category * | | Description * | Quantity | | Rate * | | Line item tota | I Date | | | | | |
| Select a value | \$ | | | | | \$0.00 | \$0.00 | MM/dd/yyyy | | | | | |
| | | | | | | | | | | | | | |
| Add expense category | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Custom fields | | | | | | | | | | | | | |
| Field | | Value * | Date | Comm | ient | | | | | | | | |
| mvoice number | Ŷ | Text Value | Date | Comn | nemus | | | | | | | | |
| Submit Save Draft | Cancel | | | | | | | | | | | | |
| | | | | | | | | | | | | | - |

Payee: Enter vendor name

Invoice number: Enter invoice/receipt number

Note: If there is no number on the receipt to use enter the transaction date as the invoice number, MMDDYYYY

Invoice date: Enter invoice/receipt date

Note: If receipt date is from prior months, enter the <u>current date</u> in this section

Approval rule: Enter department's approval rule

Expense detail/purpose: Write brief explanation of purchase and purpose of event

Fill in Distribution

| b Financial Edge NXT × + | | | | | | | | | | - o × |
|--|-----------------------------|--------------------|------------------------|-----------------------|-----------------|----------------------|----------------|--------------------|--|------------------|
| ← → C 🔒 fenxt.blackbaud.com/expense | s/workcenter?svcid=fenxt&en | vid=p-HxIMs0CiQkyR | IpJELFY | Ug&tenantid=5ec78e4b- | 2e16-4c7e-a510 | -67ac0b704bd8 | | | | x 🚺 🗄 |
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| Add invoice request | | | | | | | | | | Θ× |
| Expense talegory Description quadratic Foundation Gen Exp X \$ General Expenses to be pa 1 | | | | | atc | \$1.00 \$ | | | | |
| Apply account distribution set Distri | bute evenly Delete all o | distributions | | | | | | | | |
| Account * Debit * 030-5000 Q | t * Project Class | | Donor Restrictions 🗸 🗸 | University In | npact Code 🗸 | College Impa | ct Code V | Management Fee | | |
| • Add account distribution | | | | | | | | | | |
| Add expense category | | | | | | | | | | |
| Custom fields Field | Value * | Date | | Comment | | | | | | |
| Invoice Number 🗸 🗸 | Text value | Date | m | Comments | | | | | | |
| Changes Required to Vendor Record 🔹 | Yes No | Date | | Comments | | | | | | |
| Payment Type 🗸 🗸 | Select value 🗸 | Date | m | Comments | | | | | | |
| Check requires a Remittance Advice 💙 | ◯ Yes ◯ No | Date | m | Comments | | | | | | |
| Add another custom field Attach receipt(s) * | | | | | | | | | | |
| Drag a file here or click to browse | | | | | | | | | Paste a link to a file | |
| | | | | | | http://www.some | thing.com/file | | | |
| a | | | | | | | | | Done | |
| Submit Save Draft Cancel | | | | | | | | | | |

Expense category: Select "Foundation Gen Exp" from dropdown

Rate: Enter dollar payment/reimbursement amount (\$)
Note: Confirm tips for meal reimbursements are no more than 20%

Account: 030-5000 is your default, do not change

Project: Enter selected project ID, which will auto populate (DO NOT CLICK ON THE HOURGLASS)

Class, University Impact Code, College Impact Code, and Management Fee can be left blank

Fill in Custom fields

Value: Re-enter invoice number, then tab over to Date and enter the actual invoice date

Change Required to Vendor Record: Select "No"

Payment Type: "Check – Mail to Vendor" or "Check – Hold for Pick-up"

Check requires a Remittance Advice: Select "No"

Upload (or drag) all supporting documents needed to fulfill payment

Click Submit