Procurement Services

Quick Reference Guide: RealSource

1. Getting Started

LOGIN to RealSource

- Click the RealSource Staff Login on the RealSource Home page
- Login using your eID credentials
- New users login and start step 2

2. Profile Setup

UPDATE PERSONAL INFORMATION

- Click the user icon in the top right of the screen, then View My Profile
- On the left, click on what you'd like to edit (i.e. phone number)
- Review/Edit any information
- Click Save before clicking on another tab

3. Vendor Search

SEARCH FOR AN EXISTING VENDOR

- Click the Vendor Icon on the left side of the screen
- Hover over Manage Vendors
- Click on Search for a Vendor or enter the Vendor name in the search bar and click the magnifying glass
- A new screen will show, you will see the vendor(s) there

UPDATE AN EXISTING VENDOR

- Scroll to the bottom of the Shopping Dashboard and click the *Existing Vendor Request* form
- Complete the form and submit. You will be able to update vendor information that is out of date or incorrect.

ADD A NEW VENDOR

- Click the Vendors icon on the left side of the screen
- Hover over Requests
- Click Request New Vendor
- Choose whether your request Is for a company of individual
- Complete all of the fields and submit the form

4. Contract Search

SEARCH FOR AN EXISTING CONTRACT

- Click on the Contracts badge on the left side of the screen
- Hover over Contracts
- Click Search Contracts
- View the list there or you can add filters to help you search

REQUEST A NEW CONTRACT

- Click on the Contracts badge on the left side of the screen
- Hover over Requests
- Click Request Contract
- DO NOT change the Contract Request Template
- Enter a Contract Request Name
- Complete the form and submit

UPDATE A CONTRACT

- If an update is needed, reach out to the contract manager via eMail

5. Shopping – Creating a Cart

eCATALOGS

- From the Shopping Home page
- In the punch-out catalogs area, click supplier's icon to begin session
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the items to your cart
- Follow Submit Active Cart instructions below (#5)

VCU FORMS

- From the Shopping Home page
- In the Forms section (bottom under punch out supplier icons), click on the appropriate form icon
- READ the form's instructions
- Select from Available Actions, Add and Go to Cart to enter one item
- Select Add to Cart if you have more than one line item and continue adding items using the same form. After the last item, select Add and Go to Cart
- Click Go

6. Modifying an Active Cart (not all steps in this section are required)

REMOVE ITEMS FROM CART

- Open Active Cart by clicking on the Cart at the top right of the home page
- Click the check box to the right of the line item that you want to remove
- Then click the down arrow action icon to the right of the Number Line
- Select Remove Selected Items from the drop-down menu

APPLY CONTRACT # TO ITEM(S)

- When using a form
    - After selecting a supplier
    - Click select contract
    - Choose applicable contract #, then OK
- For punch-out items, catalog or non-catalog items in your cart
    - Click select price or contract before clicking proceed to checkout
    - Choose applicable contract #
    - Click OK, then Save

CHANGE PRODUCT QUANTITY

For Catalog items only already in cart

- Modify number in Quantity field
- Click Save

For Form Quantities and Amounts Already Added to Cart

- Click on the product description of item to open the form
- Modify the quantities and/or amounts
- Select Save in the drop-down menu and click GO
- Close the form window

For Punch-out items – changes can not be made on punch-out item orders

MODIFY ACCOUNTING CODES AT THE HEADER

- Click Proceed to Checkout
- Find the Account Codes section
- Click Edit in the Accounting Codes box (pencil icon)
- Enter the appropriate code in the corresponding box OR click edit, then select profile values, select CU value or select from your favorites (heart) for pre saved values.
- Click Save

SPLITTING ACCOUNTING CODES AT LINE

- Click Proceed to Checkout
- Click on the pencil to the left on the box at the line
- Choose Override Accounting Codes at line (this will apply to the line and override the Header value)
- Enter correct % or amount beneath the price/quantity drop down menu for each chart string
- Click Save to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS

- Click Proceed to Checkout
- In the Internal Notes and Attachments section, click Edit button
- Add note, click save
- OR add attachment
- Click browse to find attachment
- Choose attachment and save

ADD EXTERNAL NOTES (TO SUPPLIERS)

- External notes and attachments are for VCU forms or non-catalog items only
- Click add attachment
- Click Browse to find attachment
- Choose attachments and save

7. Submit or Assign an Active Cart

- Once lines/items have been added to cart and modified if necessary
- Click Proceed to Checkout button above order and review order for accuracy
- Change the Prepared For and Prepared By. The Prepared For should have the name of the person who is creating the cart and the Prepared By should have the Requesters name
- Click Assign Cart and select assignee, add note to the Requester if needed or just click assign

For Requesters – skip previous step, click Submit Req for Approval

8. Tracking a Requisition

FIND A REQUISITION

- Click Orders Icon (at the left)
- Click Search select type of document
- Choose My Requisitions, All Records, etc.
- Select a date range at the left
- You can filter the search by Supplier, Participant, Approved By, etc.
- Click the Requisition Number link
- View the summary detail, approval status of history and add comments if needed

9. Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION

- Click Orders icon (to the left)
- Click My Orders, then My Requisitions
- Click the Requisition Number link
- In the Available Actions drop-down, select Withdraw Entire Requisition
- In message box, type your reason
- Click Withdraw Entire Requisition

WITHDRAW A LINE

- Click Orders icon (to the left)
- Click Search Documents, then My Requisitions
- Click the Requisition Number link
- Click on the pencil to the right of the line price
- Click Withdraw Item

10. Receiving – Creating a Receipt

CREATING A RECEIPT

- Click on the Notifications tab at top right to see all notifications
- Click on PO Number that you want to receipt
- From the PO menu, choose Create Quantity or Cost Receipt, then Go
- The receipt will automatically be populated with the PO information
- Enter Packing Slip # (required) and/or notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select Complete at the top or bottom of the page

CREATING A PARTIAL RECEIPT

- Click on the Notifications tab at top right to see all notifications
- Click on PO number that you want to receipt
- From the PO menu, choose Create Quantity or Cost Receipt, then Go
- Review and modify pre-populated quantity or amount
- If line item(s) have not been received, click Remove Line (Trashcan)
- Enter Packing Slip # (required) and/or notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select Save Updates and Complete at the top or bottom of the page

CREATING A RECEIPT WITH RETURN/CANCELLED

- Click on the Notifications tab at top right to see all notifications
- Click on PO number that you want to receipt
- From the PO menu, choose Create Quantity or Cost Receipt, then Go
- For one of the lines that was previously received, enter a quantity and change Line Status to Returned or Cancelled
- Review line level data
- Select Complete at the top or bottom of the page
- Contact Supplier for directions on physically retuning items

DELETING A DRAFT RECEIPT

- Click Accounts Payable icon (at left), click Receipts, then click View Draft Receipts
- Click Delete box beside the drafts you want to delete

INCREASE QTY OR PRICE ON PO

- Option 1 – follow cancel instructions above and create a new PO to increase total purchase price
- Option 2 – create a new order for the difference

11. Approve/Reject a Pending Requisition

APPROVE via EMAIL (Guide in News and Announcements section of home page)

- Set up Email Approval Code under My Profile, User's Name, Phone, etc, enter approval code and click Save. (Must be set up prior to receiving email notice)
- Open Approval Email
- Review Requisition details, click Take action, select an Action
- Enter Email Approval Code, Click Submit

APPROVE IN RealSource

- Click on Action Items, at top right
- Click on Requisitions to Approve
- If multiple folders, click on the one you want to take action on
- Review the items, ship to address, accounting codes, notes, etc.
- Select Approve or select check box, then choose Approve/Complete Step and Go in the Available Actions drop down menu

REJECT A REQUISITION

- Click on Action Items at the top right
- Click on Requisitions to Approve
- Click on requisition number to view the complete requisition
- From Available Actions, select assign to myself, click Go
- From Available Actions, select Reject Requisition, click Go
- Reject Line Reason box appears – enter reason for rejecting
- Click Reject Line Items
- Select Approve/Complete Step in the Available Actions drop-down menu
- Click Go

When placing orders in RealSource use the yellow star ★ badges available throughout the system. These badges provide helpful click-through guides or short videos to assist you in completing different processes