



VCU RealSource

Vendor Help-Guide

VIRGINIA COMMONWEALTH UNIVERSITY

Procurement Services

Version 1, January 26, 2021

Table of Contents

A. GENERAL	2
1. Audience	2
2. Browser Compatibility	2
B. VENDOR REGISTRATION.....	3
1. General Information	3
2. Company Overview	6
3. Business Details.....	7
4. Addresses	9
5. Contacts	12
6. Diversity	13
7. Tax Information.....	14
8. Certify & Submit.....	16
C. LOGGING IN.....	17
D. CONTRACTS.....	20
E. SALES ORDERS.....	22
F. INVOICES	23
1. General.....	23
2. Mail	23
3. PO to Invoice Email Flip (ICAs Only)	23
4. Portal Invoices.....	25
5. Searching for Sales Invoices	29
6. Invoice Statuses	30
7. Invoice Table	31
G. WHERE TO GET HELP?.....	33

A. GENERAL

1. Audience

This is a manual for VCU Vendors. Vendors are on-boarded to the RealSource portal only **after they have been selected to receive a VCU contract or purchase order or need to submit invoices to VCU.**

Vendors who wish to do future business with VCU must register instead in the Commonwealth of Virginia's vendor master portal via the "Register Now" tab [here](#).

2. Browser Compatibility

RealSource has no known web-browser compatibility issues. However, if you experience web-browser issues, please try to first access the tool using another web-browser before contacting the university.

B. VENDOR REGISTRATION

1. General Information

To register as a Vendor you must receive an invitation to register, because the registration is limited to people transacting with VCU. You will need to have several pieces of information available described below. Here is an example of the invitation email you should have received by email.



Before registering, please have the following information accessible:

- Addresses (Fulfillment, Remittance, Physical)
- Phone Number, Emails, Any contact information
- Tax information (Tax ID Number)
- Basic Business Information (Legal Structure, Number of Employees, etc.)

Vendor Registration [Registration Tutorial](#)

To begin your registration, please complete this page and click "Create Account". You will be directed to the VCU Supplier Management Portal to enter your information.

Your Contact Info

First Name* Last Name* Title

Phone Number*

International phone numbers must begin with -

Preferred Time Zone*

Your Login

Email* Confirm Email*

Password* Re-Enter Password*

Account Recovery Question*

Answer* Confirm Answer*

Enter the appropriate information in each field (*= required field)

Contact Information:

- First Name*
- Last Name*
- Phone Number*
- Preferred Time Zone*

Login Information:

- Email*
- Confirm Email*
- Password*
- Re-enter Password*
- Account Recovery Question*
- Answer*
- Confirm Answer*

Once each required field is completed, select **Create Account**.

Begin verifying and entering the following information.



- Verify your legal company name
 - This is the business name that will appear on all solicitation responses, purchase orders and payments. If your company's legal name is different from the one displayed in the email invitation you receive, please correct it here.
- Select **Next**

2. Company Overview

Enter the following company information. Complete all applicable fields, required fields are noted with an asterisk (*) as seen below.

Company Overview

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Legal Company Name *	<input type="text" value="Kali's Necklaces"/>
Doing Business As (DBA) ⓘ	<input type="text" value="Kali's Necklaces"/>
Country of Origin * ⓘ	<input type="text" value="United States"/> ▼
Legal Structure * ⓘ	<input type="text" value="Individual/Sole Proprietor or !"/> ▼
Tax ID Number Type ⓘ	<input type="text" value="Social Security Number / Soci"/> ▼
Tax ID Number *	<input type="text" value="*****"/> ⓘ ⓘ
Website	<input type="text" value="http://kalisnecklaces.com"/> ⓘ

Additional Questions

Will the goods or services you provide require your staff to perform work on VCU premises? *

Yes
 No

Are you registered with eVA, the Commonwealth of Virginia's e-Procurement System? *

Yes
 No

Please provide the eVA registration number *

If you are an existing VCU vendor, as an added security measure to confirm your identity, please provide a recently paid VCU invoice number, the associated amount and invoice date.

▼

Are you interested in receiving information about electronic payments?

▼

Are you interested in receiving information on how to submit electronic invoices?

★ Required to Complete Registration

[Save Changes](#)

Company Overview

- Doing Business As (DBA)
- Country of Origin (*)
- Legal Structure (*) If you are an international supplier, please choose Non- US Based Entity from the **Legal Structure** menu. The Tax ID Number field will

then become optional.

- Tax ID Number (*)
- Website

Additional Questions

- Respond to each of the additional questions
- Select **Next**

3. Business Details

The information you provide on this page will be used to help determine the size and goods your company provides.

The screenshot shows the 'Business Details' page in the VCU RealSource system. The user is 'Kali Kellam'. The page is titled 'Kali's Necklaces' and shows the registration progress as '2 of 6 Steps Complete'. The 'Business Details' section includes fields for 'Year Established *' (with a calendar icon and 'YYYY' placeholder) and 'Number of Employees *'. Below this is the 'Products and Services' section with a 'Commodity Codes *' field and an 'Edit' button. The 'Additional Questions' section has a 'Total Revenue/Receipts for the most recent 4 Quarters *' field. At the bottom, there are navigation buttons: '< Previous', 'Next >', and 'Save Changes'. A 'Need Help?' link is also present.

Business Details

- Enter the year your firm was established (*)
- Enter the correct number of employees (*)

Additional Questions

- Enter the Total Revenue/Receipts for the most recent 4 Quarters for your organization (*)

Products and Services

- Commodity codes (*): Commodity codes are used to determine, what goods or services a company provides. Select all commodity codes by choosing the **Search** icon. More than one commodity code may be added to the field. An example of the search function for commodity codes is below.



Commodity Codes

Use Search or browse the list to select applicable Commodity Codes. You can select multiple before clicking Done.

Search

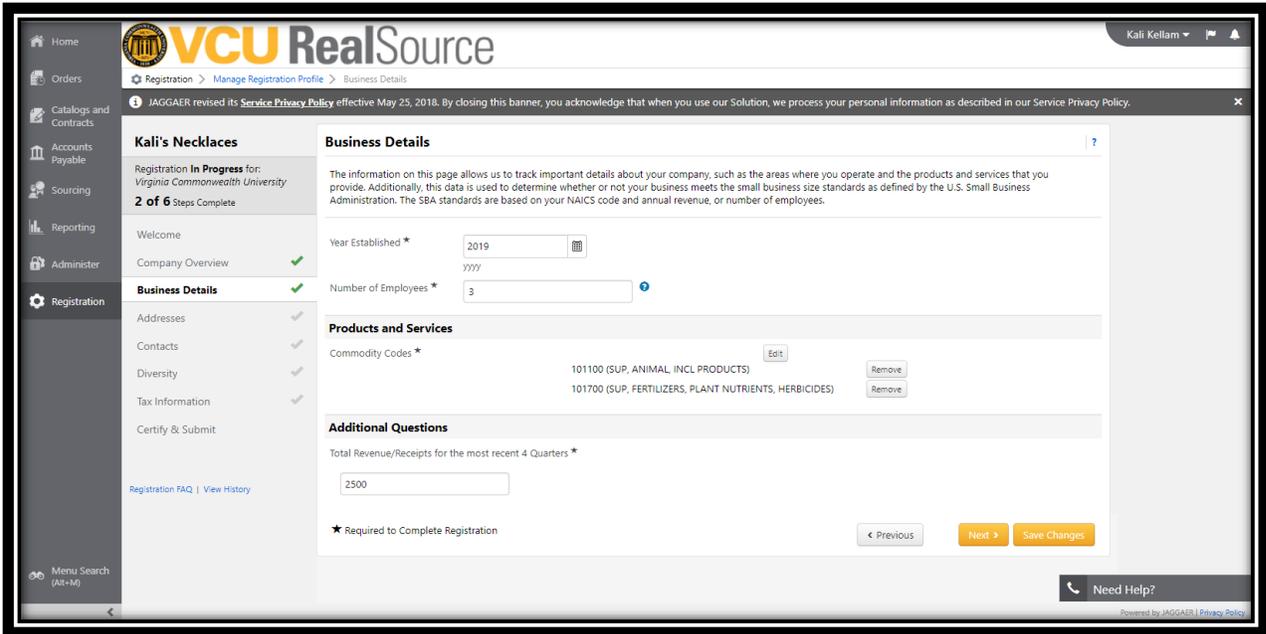
2 Selected Codes

Showing 1 - 20 of 312 Results

Results Per Page 20 Sort by: Commodity Code Page 1 of 16 ?

Commodity Code	Description
101000	OTH, ANIMALS
101100	SUP, ANIMAL, INCL PRODUCTS
101300	EQUIP, ANIMAL, INCL CONTAINMENT & HABITATS
101600	SUP, HORTICULTURE & LANDSCAPE ITEMS
101700	SUP, FERTILIZERS, PLANT NUTRIENTS, HERBICIDES
111600	SUP, FABRICS, TEXTILES & FIBER IND MATERIALS
121400	SUP, GASES & ELEMENTS
141100	SUP, PAPER PRODUCTS, OTHER
141114	SUP, COPY PAPER
141115	SUP, GIFT CARDS, CERTIFICATIONS & OTHER CASH INCENTIVES
141116	SUP, BUSINESS CARDS
141117	SUP, PAPER PRODUCTS, PERSONAL
141118	SUP, PAPER PRODUCTS, BUSINESS USE
141200	SUP, PAPER, INDUSTRIAL USE
151000	SUP, FUELS
151200	SUP, LUBRICANTS & OILS & GREASES & ANTI CORROSIVES
221000	EQUIP. HEAVY CONSTRUCTION MACHINERY &

Done Close



- Select **Next**

4. Addresses

Enter the following addresses for the organization. Vendors are required to enter fulfillment, physical and remittance addresses.

Fulfillment address: Address where the Purchase Order (PO) will be received.

Physical address: The firm's main street location.

Remittance address: Address in which the payment will be received. This must also match the address on the invoice.

If for any reason the remittance address changes, vendors *must* update their vendor profile within RealSource before any payments will be processed.

- Select **Add Address**

Basic Information

The address “label” is the naming preference (as shown in the example). If the address added is the Main Office, add that information here.

- Select **Next**

Address Details

Enter the following address information. Complete all applicable fields, required fields are noted with an asterisk (*) as seen below. Once completed, the form should look similar to the screen below.

Add Address [Close]

Address Details (Step 2 of 3) [Help]

How would you like to receive purchase orders for this fulfillment address?

Email Address

Confirm Email

Country *

Address Line 1 *

Address Line 2

Address Line 3

City/Town *

State/Province *

Postal Code *
Example: 12345 or 12345-6789

Phone * ext.
International phone numbers must begin with +

Toll Free Phone ext.
International phone numbers must begin with +

Fax:
International phone numbers must begin with +

* Required to Complete Registration

< Previous Next >

- Primary Contact For This Address
 - Enter the following address information. Complete all applicable fields, required fields are noted with an asterisk (*) as seen below.
 - Contact Labels are the naming preference for the contact. If the contact added is the Owner or President, add that information here

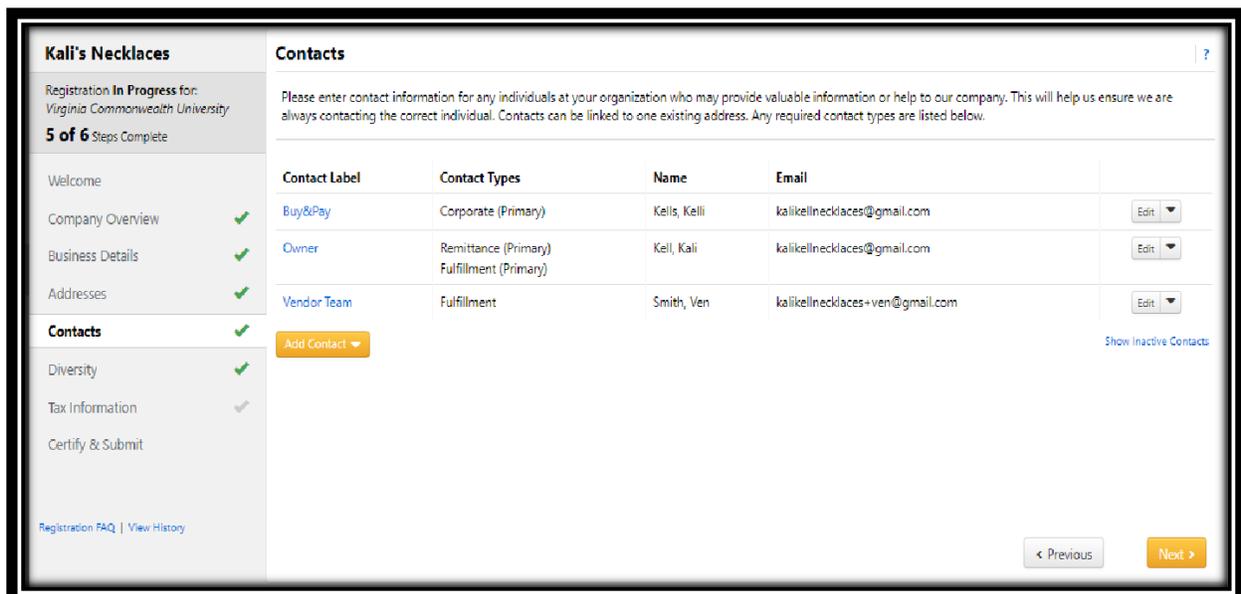
- Select **Save Changes**



If needed, add any additional addresses by selecting the Add Address, then repeat steps 1-4 for STEP 3: ADDRESSES. Once all addresses are visible in the portal, select the **Next**.

5. Contacts

Enter the following contact information. Complete all applicable fields, required fields are noted with an asterisk (*) as seen below



- Select Add Contact
- Select Next

6. Diversity

VCU is committed to the establishment, preservation and strengthening of small, women, and minority-owned businesses. If your firm has been certified with any of the federal or Commonwealth of Virginia certification designations below, please select each.

- Diversity
- Select **Add Diversity Classifications**
- If the firm is not a diverse vendor, this may also be indicated in this section.

Diversity | ?

We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.

Required Information
Please click on the "Add Diversity Classifications" button to declare any Diversity Classifications that are applicable to you or to state that you do not qualify.

Click the button below to choose the diversity classifications that apply to your business.

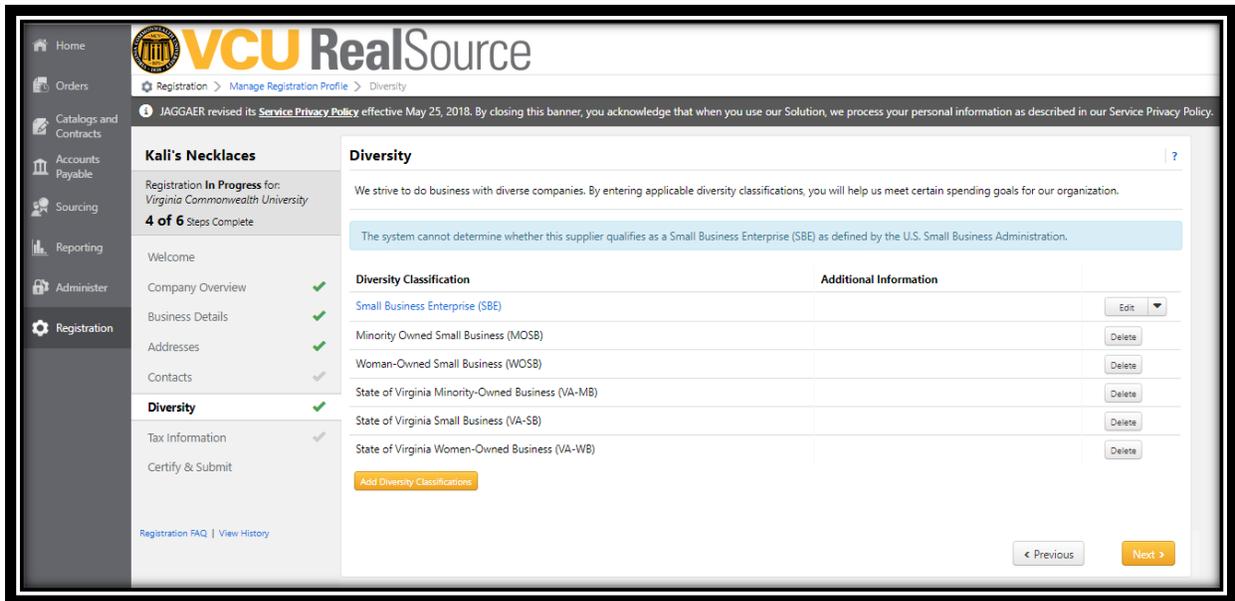
Add Diversity Classifications

< Previous Next >

- If you are not a diverse vendor, please indicate this by selecting the "Does Not Qualify As A Diverse Supplier."
- **Foreign vendors** must also chose this option as this classification only applies to domestic vendors.

Federal and Diversity Classifications

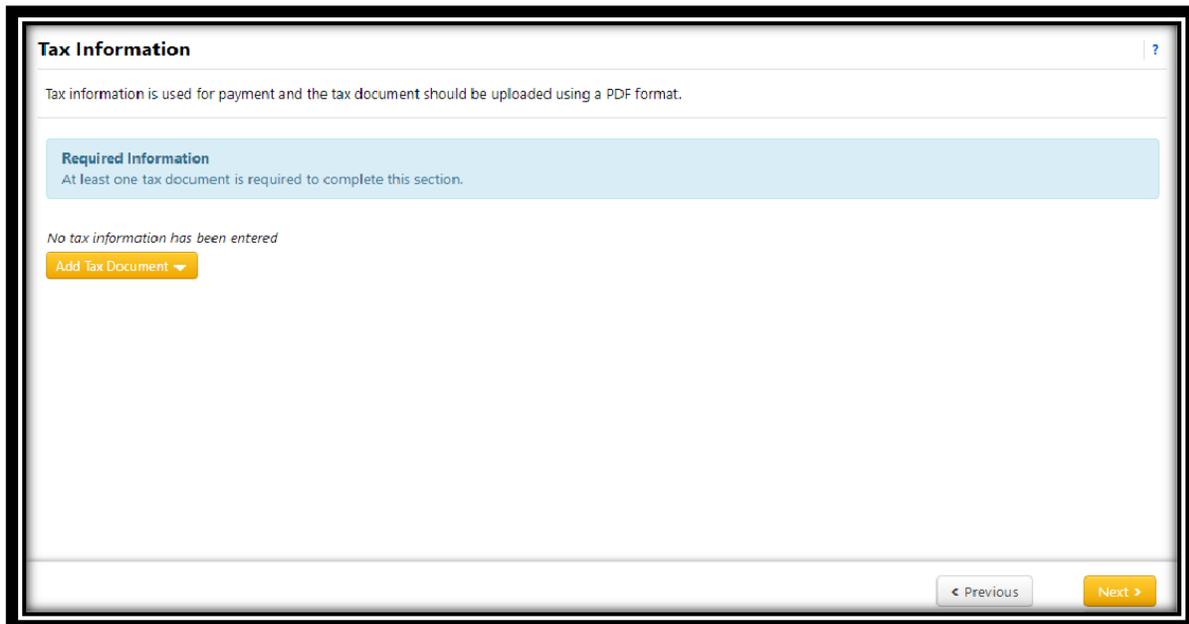
- Select the Federal and State Diversity Classifications that applies to your organization



- Select **Next**

7. Tax Information

As a vendor, your business is required to provide a copy of your tax document (W9, W8, etc.). You may choose to use the pre-populated document that has been completed by RealSource based on the information you have provided in the registration.



Tax Information

- Select **Add Tax Document**
- Complete the form

Add Tax Document Screen

Add Tax Document

Tax Type * W-9

Tax Document Name * Kali's Necklaces W9

Tax Document Year 2019

Signature Status Not Signed

Tax Documentation

Select file Done ✓

tax.doc.pdf 100% ×

[Download Pre-populated Tax Document](#)

I certify this tax document

Electronic System Submission

Under penalties of perjury, I certify that:

- I am the same person (or payee's agent) accessing the system and submitting this form as identified on this form.
- By submitting this form electronically, I am offering my electronic signature as the payee identified on this form and I agree my electronic signature is the legal equivalent of my manual signature.

eSignature

Enter Portal Password

* Required to Complete Registration

Save Changes Close

- Select **Save Changes**
- Select **Proceed to Certify and Submit**

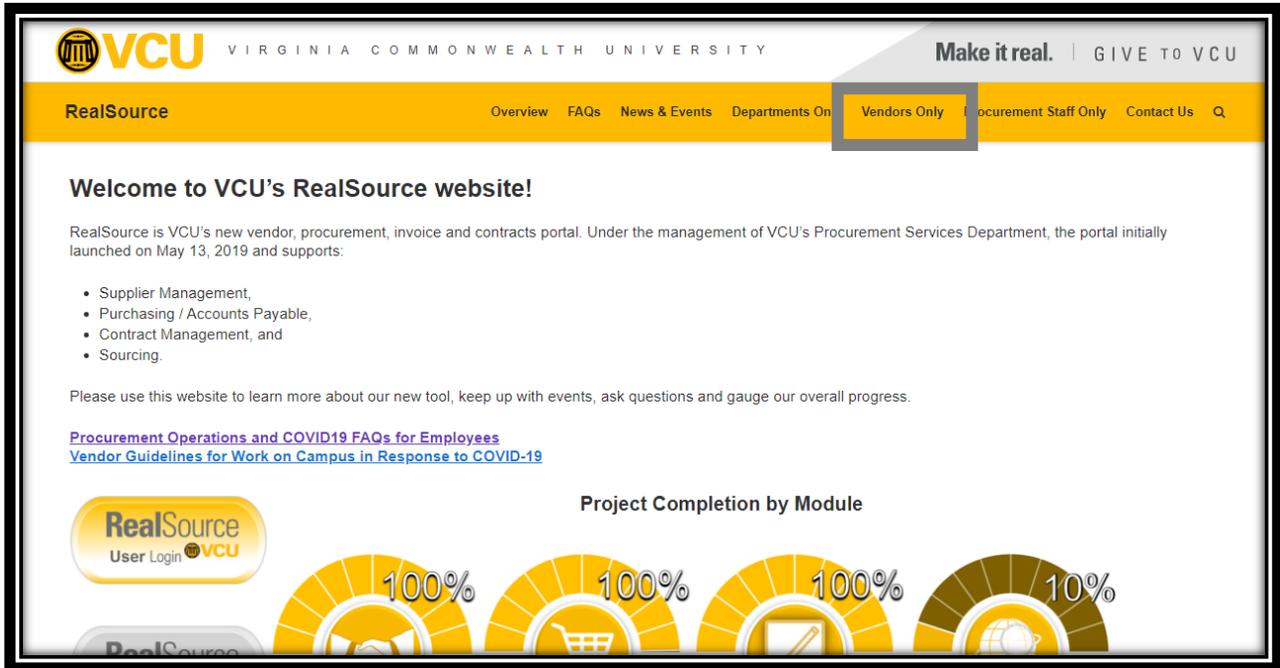
8. Certify & Submit

The screenshot shows a web interface for a vendor registration process. On the left, a sidebar titled 'Kali's Necklaces' indicates the user is '6 of 6 Steps Complete'. The sidebar lists several steps: 'Welcome', 'Company Overview' (checked), 'Business Details' (checked), 'Addresses' (checked), 'Contacts' (checked), 'Diversity' (checked), and 'Tax Information' (checked). The main content area is titled 'Certify & Submit' and contains a certification statement: 'I certify that I have read and agree to the following:'. Below this are four bullet points: 1) 'Registering as a VCU vendor does not guarantee award of a VCU purchase order or purchase contract.' 2) 'All information and data in VCU's vendor portal is subject to the Virginia Freedom of Information Act (FOIA), found at § 2.2-3700 and following of the Code of Virginia.' 3) 'The registration information provided is true and I am authorized to make this certification on behalf of the vendor.' 4) 'The vendor is responsible for the security of their portal account, including restricting access to it, maintaining the confidentiality of login information, and taking any other actions necessary to protect the security of the vendor's account. VCU will not be responsible for a third party's fraudulent collection of VCU's payments due to the vendor's failure to update or protect its account information.' Below the certification are input fields for 'Preparer's Name *' (Kali Kellam), 'Preparer's Title *' (Owner), and 'Preparer's Email Address *' (kalkellnecklaces@gmail.com). There is also a 'Today's Date' field showing 4/3/2019 and a 'Certification *' checkbox which is checked with the text 'I certify that all information provided is true and accurate.' A note at the bottom left states '★ Required to Complete Registration'. A yellow 'Submit' button is located at the bottom right.

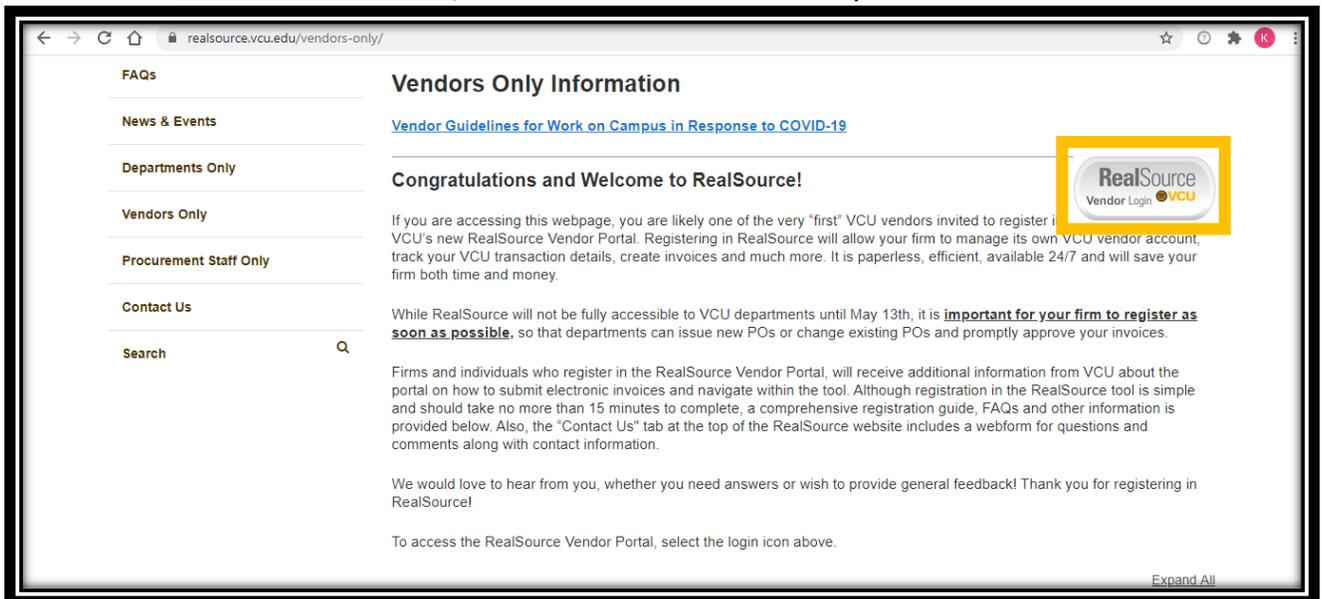
- Please carefully read all of the information presented above.
- If all information looks "ok," check (✓) the Certification* field to certify that all information provided is accurate for your organization.
- Select **Submit**
- You will receive a confirmation email from VCU RealSource notifying your organization that the registration profile is now complete. The Vendor Support team at VCU will review your registration profile and contact your organization if any additional information is needed.

C. LOGGING IN

This login link is for active and fully registered vendors only.



- Visit the [RealSource Website](#), and select the Vendors Only tab.



- Once you have selected the Vendors Only tab, select the login button shown above. From there, you will be redirected to the RealSource login screen.



Welcome to RealSource, Virginia Commonwealth University's Supplier Portal.

This portal is available by invitation only to select VCU suppliers with active VCU transactions. Once you've registered, you can manage your VCU account, create and submit electronic invoices, view POs and send questions to VCU's purchasing and payments staff.

The RealSource Supplier Portal runs securely on a JAGGAER platform. Registration takes only 15 minutes to complete. After you've registered, you can return to this webpage to access your RealSource account 24/7.

For more information about RealSource, including detailed registration information and troubleshooting tips, please visit our website at <https://realsource.vcu.edu> ("Vendors Only" tab). If you have registration issues, please email RealSource@vcu.edu or call (804) 828-1077, Option 6.

Enter your email to Login/Create Account

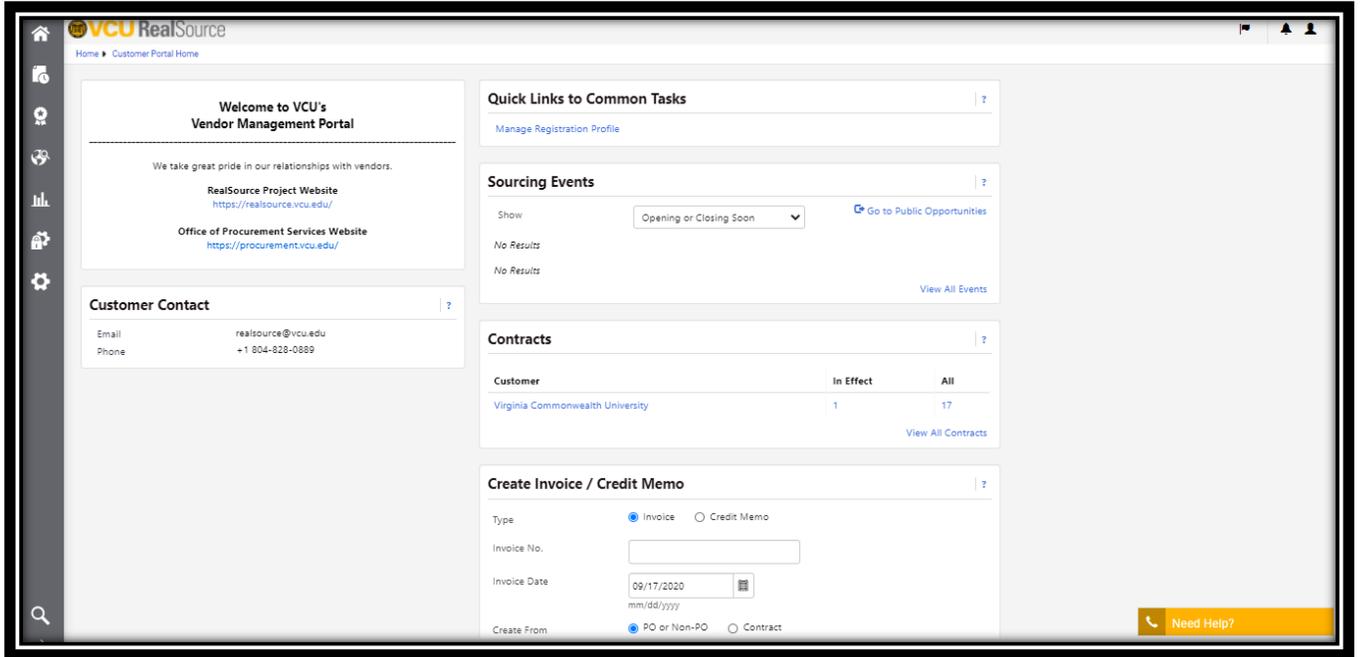
English ▾

Next

Email

- Enter the **Email Address**
- Select **Next**
- Proceed to entering in your Password, if you have lost or forgotten the password; please call JAGGAER Supplier Support at 1-800-233-1121 and select option 2. JAGGAER will be able to help reset your password, VCU does not have access to this information for your security.

Now, you can see the RealSource Vendor Portal Homepage.



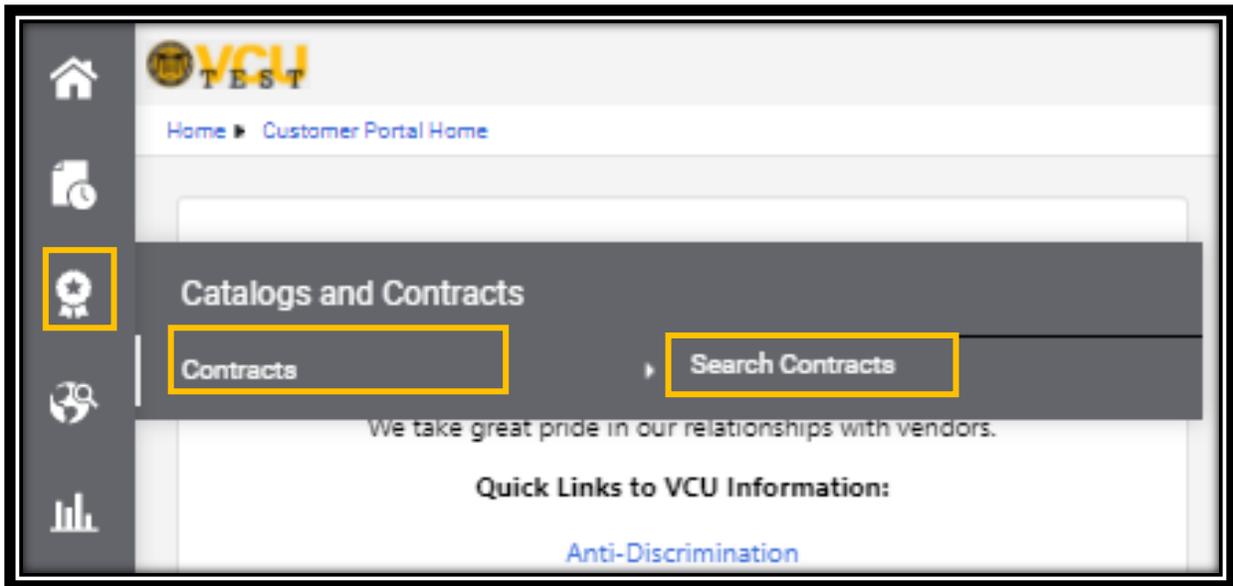
- By logging in to RealSource, you can view and comment on sales orders, review contract information, create invoices and credit memos.

D. CONTRACTS

Vendor Contracts are submitted by review or new university-written contracts are requested using the RealSource Contracts+ module. Once all relevant data, information and pre-requisites have been satisfied by the department and vendor, a contract can be awarded.

Further, Contracts+ serves as the university's system of record for all purchase contracts and agreements.

To view your contracts within the Contracts+ module in any status, select the **Catalogs and Contracts Icon** on the Homepage.



Below, you can see all contracts where you serve as the Second Party. You can see all contract and their statuses. Contract Statuses are listed below.

Contract Status	Description
Draft	Contract Manager has begun creating the contract and will soon submit it.
Pending Signature	Contract has been submitted, but is still awaiting signatures from either or both parties.
Executed: Future	The contract has been signed by both parties, but will not be In Effect until the official start date.
Executed: In Effect	The contract has been signed by both parties, and is In Effect and available for use.
Expired	Contract end date has passed.

Customer Name	Second Party	Contract Number	Contract Name	Status	Version Type	Version Numbers	Start Date	End Date
Virginia Commonwealth University	B&G Financial Consulting	C0000263	Brandy Test 2.20.2020	Draft	Original	Renewal 0, Amendment 0	2/20/2020 12:00:00 AM	2/21/2020 11:59:59 PM
Virginia Commonwealth University	B&G Financial Consulting	C0000271	AD<10	Draft	Amendment	Renewal 0, Amendment 1	2/21/2020 12:00:00 AM	2/3/2021 11:59:59 PM
Virginia Commonwealth University	B&G Financial Consulting	C0000271	AD<10	Executed: Future	Renewal	Renewal 1, Amendment 0	2/21/2021 12:00:00 AM	2/20/2022 11:59:59 PM
Virginia Commonwealth University	B&G Financial Consulting	C0000271	AD<10	Expired	Original	Renewal 0, Amendment 0	2/21/2020 12:00:00 AM	2/20/2021 11:59:59 PM
Virginia Commonwealth University	B&G Financial Consulting	C0000272	AD>10	Draft	Original	Renewal 0, Amendment 0	2/21/2020 12:00:00 AM	2/20/2021 11:59:59 PM
Virginia Commonwealth University	B&G Financial Consulting	C0000336	DocuSign1	Expired	Original	Renewal 0, Amendment 0	2/27/2020 12:00:00 AM	2/29/2020 11:59:59 PM

- Click the blue contract number, the contract will open and you can see the fields below.

Executed: Future This contract will be in effect on the start date of 2/21/2021 at 12:00 AM EST.

C0000271
AD<10

Dates: 2/21/2021 - 2/20/2022
Version: Renewal 1, Amendment 0

Header

Attachments 2
Communication Center 1

Header

Contract Number * C0000271
Contract Name * AD<10
Summary Financial services
Start Date * 2/21/2021 12:00 AM EST
Update Start Date Upon Execution
End Date * 2/20/2022 11:59 PM EST

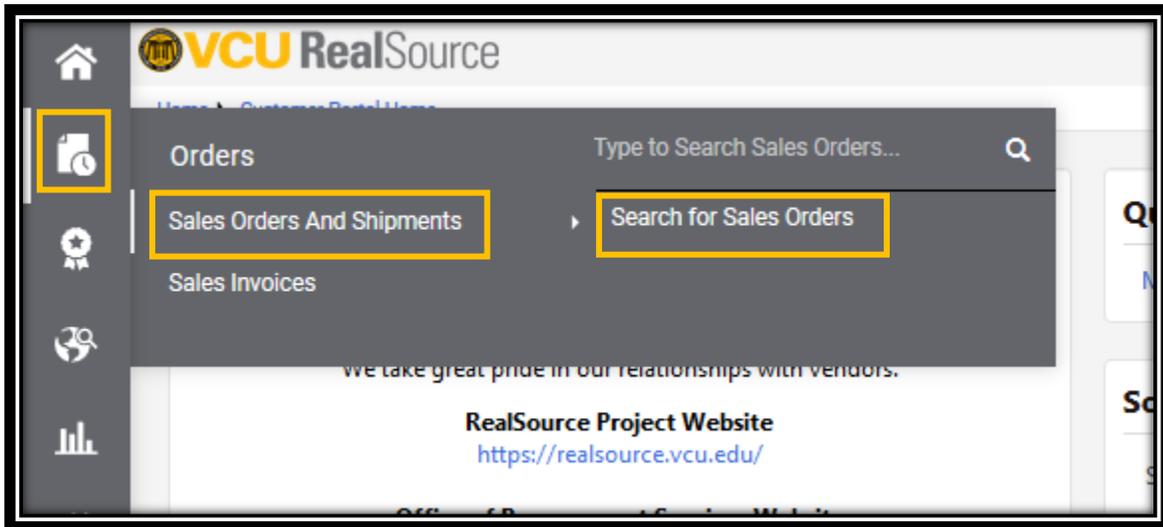
★ Required

Next >

- Contract Number
- Contract Name
- Summary
- Start Date
- End Date
- Attachments include the main contract with your company's signature and any additional attachments that VCU has attached for you to view. You may also download these attachments.
- The Communication Center is not used by VCU.

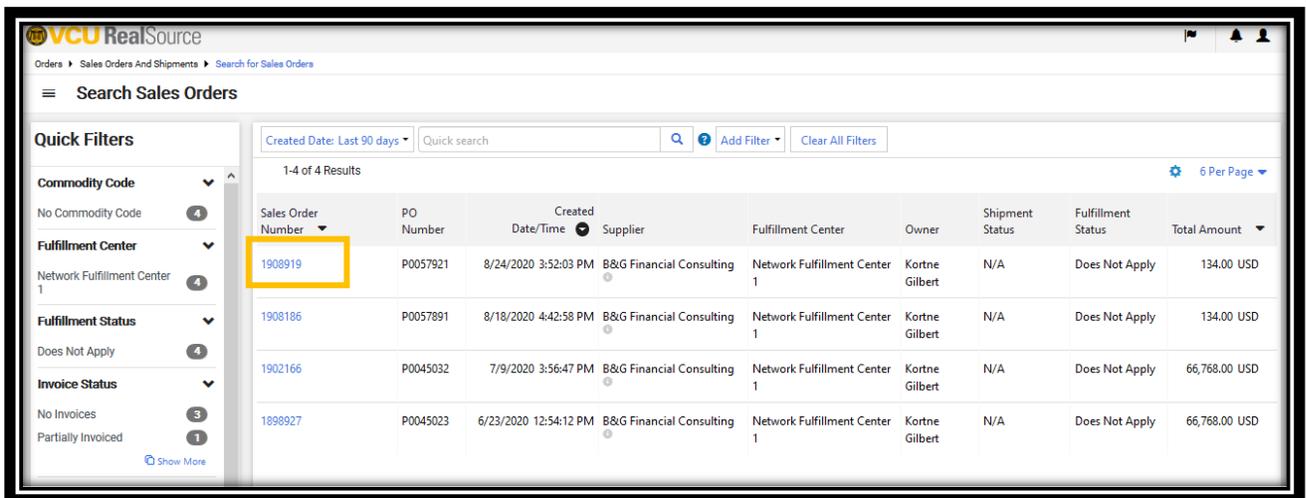
E. SALES ORDERS

Select the **Orders Icon** on the Homepage



- Select **Sales Orders and Shipments**
- Select **Search for Sales Orders**

From here, you can see all Sales Orders (POs) received from VCU within the past 90 dates. If necessary, you can filter the search to see more information about past Sales Orders.



Sales Order Number	PO Number	Created Date/Time	Supplier	Fulfillment Center	Owner	Shipment Status	Fulfillment Status	Total Amount
1908919	P0057921	8/24/2020 3:52:03 PM	B&G Financial Consulting	Network Fulfillment Center 1	Kortne Gilbert	N/A	Does Not Apply	134.00 USD
1908186	P0057891	8/18/2020 4:42:58 PM	B&G Financial Consulting	Network Fulfillment Center 1	Kortne Gilbert	N/A	Does Not Apply	134.00 USD
1902166	P0045032	7/9/2020 3:56:47 PM	B&G Financial Consulting	Network Fulfillment Center 1	Kortne Gilbert	N/A	Does Not Apply	66,768.00 USD
1898927	P0045023	6/23/2020 12:54:12 PM	B&G Financial Consulting	Network Fulfillment Center 1	Kortne Gilbert	N/A	Does Not Apply	66,768.00 USD

The Sales Order is the document number that you can use to help track orders placed by VCU with your company.

F. INVOICES

1. General

All businesses, including Independent Contractors, are required to submit invoices to VCU for payment. There are three main methods to submitting invoices:

- Submitting invoices to our Bill To address via mail,
- Submitting invoices via PO to Invoice Email Flip (Independent Contractors Only),
- Submitting invoice via the RealSource vendor portal, and
- Submitting invoices via CXML (eCatalog vendors only).

2. Mail

If invoices will not be submitted in the portal, then they must be submitted to the Bill To address on the Sales Order (PO). The Bill To address is:

PO BOX 3985

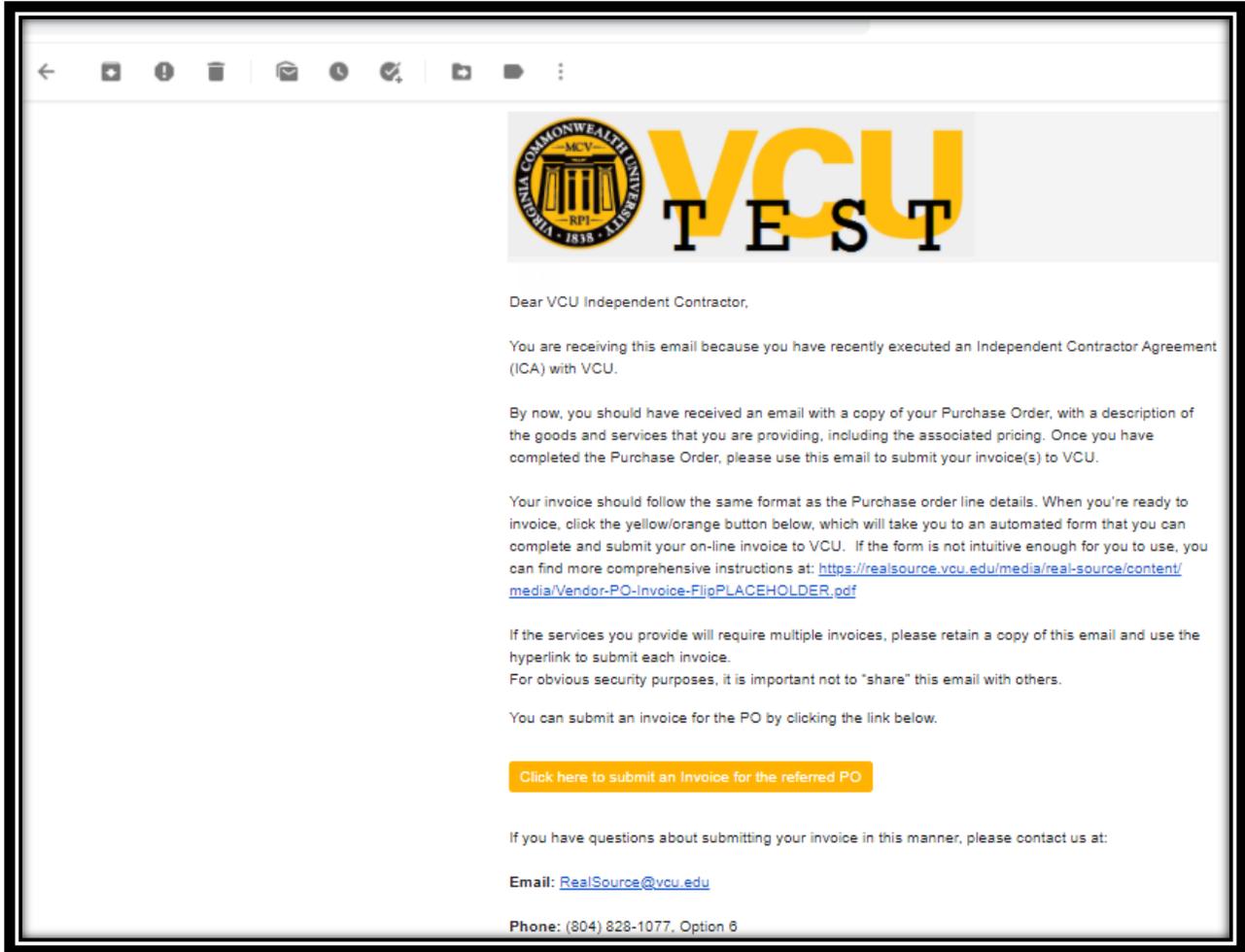
Scranton, PA 18585

3. PO to Invoice Email Flip (ICAs Only)

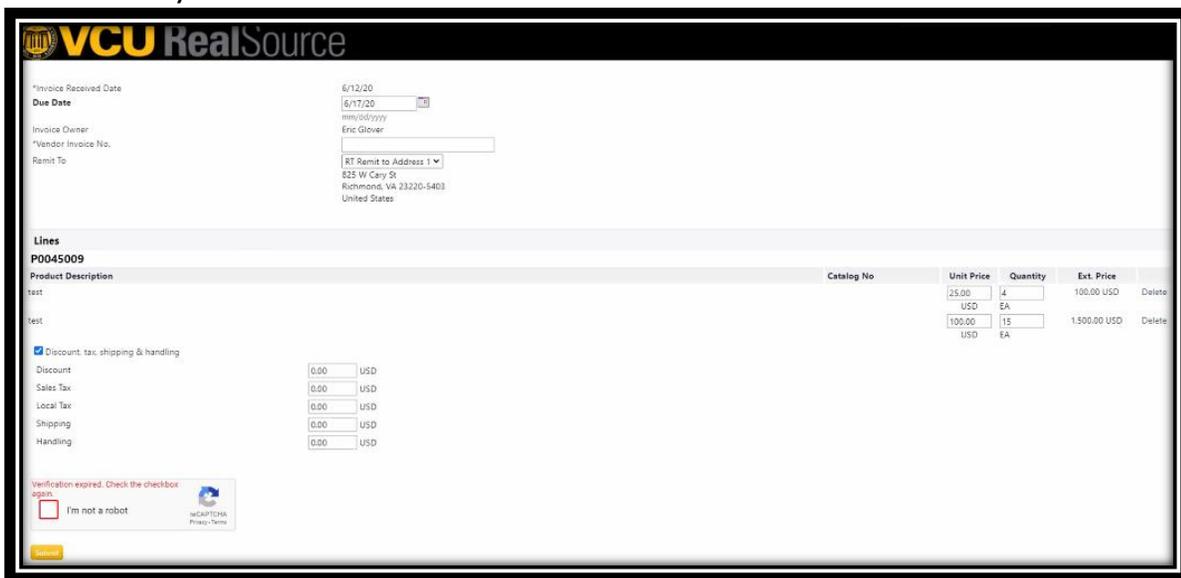
The email is triggered to be sent to you because a VCU department has issued a VCU Purchase Order. RealSource will also send you a special Sales Order number and alert. The following steps apply:

- a. Execute ICA with Department
- b. Receive Your PO
- c. Receive Your Email Invitation to Invoice
- d. Complete the work
- e. Open the Email Invitation and Click the Hyperlink to Start the Invoicing Process
- f. Complete and submit the invoice
- g. Receive confirmation of your invoice
- h. How and when you will be paid
- i. Questions.

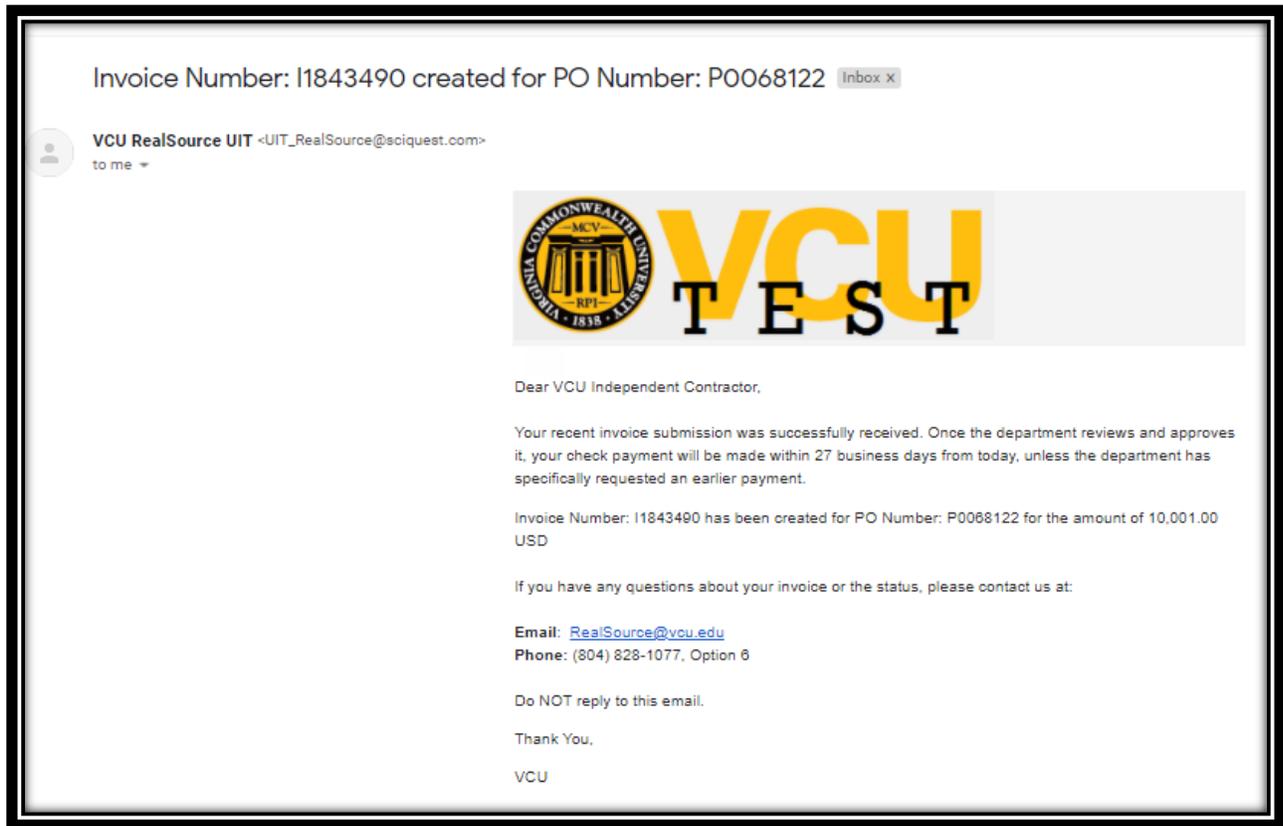
If you intend to submit multiple invoices to VCU against your Purchase Order, the hyperlink can be used to submit multiple invoices. Please safeguard and “do not” share the email; it may only be used by you to submit invoices to VCU.



- Once you access the hyperlink, a fillable invoice form will appear that matches the detail of your Purchase Order.



- Once you have completed the work specified on your PO, complete and submit the form.
- You will receive a confirmation email like the one below.



4. Portal Invoices

Portal Invoices are created by logging in to the system. To get started creating your invoice, select the sales order number in blue. This will open the sales order and its details.

VCU RealSource
 Orders > Sales Orders And Shipments > Search for Sales Orders > Summary - SO 1908919
 1 of 4 Results

Sales Order Number: 1908919 Revision 0
 External PO Ref #: P0057921
 Supplier Name: B&G Financial Consulting

Available Actions: Add Notes to History Go

Status: Sales Order Revisions PO Documents Invoices Order Acknowledgments Advance Ship Notices History

Summary Shipping Information Supplier Information

General Information		Shipping Information		Billing Information	
Priority	Normal	Ship To		Bill To	
Sales Order No.	1908919	ATTN: Kortne Gilbert		Accounts Payable	
Sales Order Create Date	8/24/2020	1001 West Franklin Street		Box 980327	
PO/Reference No.	P0057921	Floor 3		Richmond, VA 23298-0327	
PO Creation Date	8/24/2020	Richmond, VA 23284		United States	
Buyer Name	Kortne Gilbert	United States			
Buyer Phone		ShipTo Address Code	162	Bill To Address Code	VCUAP
Buyer Email	kgilbert3@vcu.edu	Delivery Options		Accounting Date	no value
Supplier Name	B&G Financial Consulting	Ship Via	Best Carrier-Best Way	Payment Terms	7% 10, Net 10
		Expedite	X	F.O.B	no value
		Requested Delivery Date	no value		

Distribution Information Supplier Information Need Help?

Cont. (Same Screen)

VCU RealSource
 Orders > Sales Orders And Shipments > Search for Sales Orders > Summary - SO 1908919

Distribution Information Supplier Information

Workflow
 Fulfillment Status: Does Not Apply
 Order Acceptance Instructions: No order acceptance instructions
 Supplier Terms and Conditions: no value

Contract: no value
 Account Code: no value
 Pricing Code: no value
 Quote Number: no value
 Note to Supplier: no note
 Attachments For Supplier

PO Clauses: no clause

Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Test 3		EA	67.00	2 EA	134.00 USD

Taxable: X
 Commodity Code: no value

External Note: no note
 Attachments for supplier
 PO Clauses: no clause

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 134.00
 Shipping
 Handling

Need Help?

- From the Available Actions drop-down, choose "Create Invoice", then select **Go**.

You may also Create Invoices from the homepage. For more details about descriptions of each field, see [Invoice Table 1](#).

The screenshot shows a web form titled "Create Invoice / Credit Memo". It has several input fields and radio buttons. The "Type" field has "Invoice" selected. The "Invoice No." field contains "9171210". The "Invoice Date" field contains "09/17/2020" with a calendar icon and the format "mm/dd/yyyy" below it. The "Create From" field has "PO or Non-PO" selected. There is an "Optional PO Number" field. The "Currency" field is set to "US Dollar". A yellow "Create" button is located in the bottom right corner of the form.

- Type
- Invoice No.
- Invoice Date
- Create From PO or Non- PO Contract
- Optional PO Number – this is required
- Enter your own **Invoice No.**
- Enter the **Invoice Date**
- Select PO or Non-PO
 - Do not select create from "Contract," this field should not be used even if there is a contract associated with the PO.
- Enter the PO number, if you are not sure of the PO number, open the Sales Order and copy the PO number.
- The Currency will populate to US Dollars.
- Select **Create**

From here, you can begin entering your Sales Invoice. Since you entered the PO number, the PO information will populate.

VCU RealSource

Orders > Sales Invoices > Search for Sales Invoices > Draft Sales Invoice 9171210

Invoice No. **9171210**
 Customer **Virginia Commonwealth University**
 Invoice Date **9/17/2020**
 PO Number **P0057921**
 Sales Order Number **1908919**
 Supplier Invoice Image [add attachment...](#)

[Save](#) [Send To Customer](#)

Invoice Messages Attachments History

Hide header Hide value descriptions

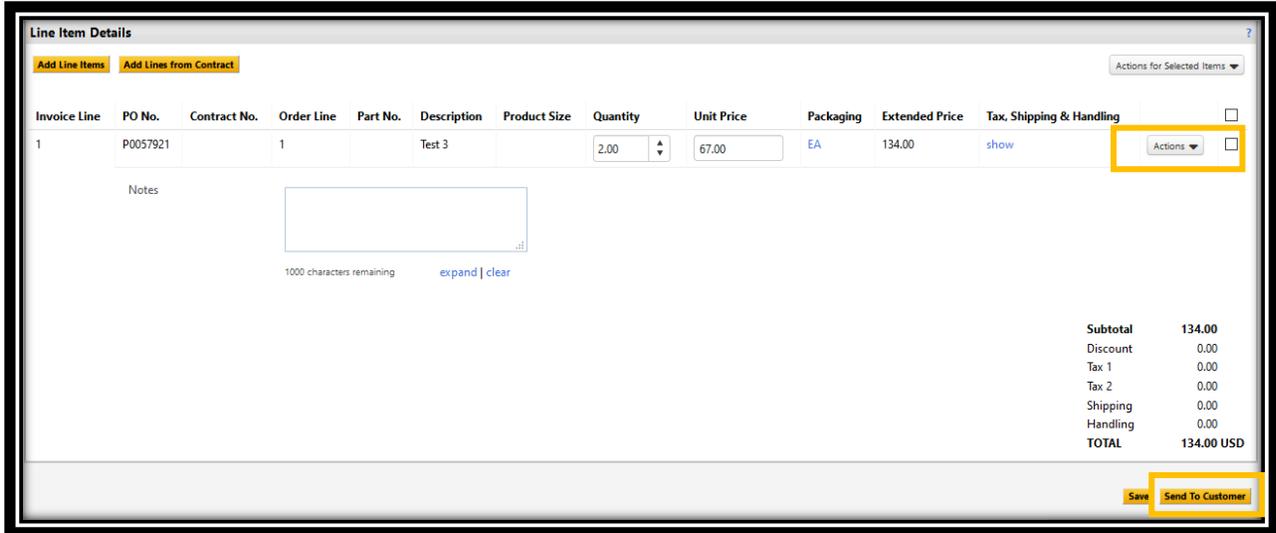
General Information	Billing Information	Customer Invoice Information
<p>Invoice Info</p> <p>Create Date 9/17/2020</p> <p>Invoice No. <input type="text" value="9171210"/></p> <p>Invoice Date <input type="text" value="9/17/2020"/> <small>mm/dd/yyyy</small></p> <p>Invoiced By Barbara Gregg</p> <p>Supplier B&G Financial Consulting</p> <p>Customer Virginia Commonwealth University</p> <p>RMA No. <input type="text"/></p> <p>Supplier Account No. <input type="text"/></p> <p>Order Info</p> <p>Sales Order Number 1908919</p> <p>PO Number P0057921</p>	<p>Billing Address</p> <p>Accounts Payable Box 980327 Richmond, VA 23298-0327 United States</p> <p>Remit To Address</p> <p>Remit To Address <input type="text" value="Home Office"/></p> <p>Remit To Location List</p> <p>Eric Glover 2852 Broad Street Richmond, VA 23223 United States Email bmyles964@gmail.com Phone 1-804-8281163-</p>	<p>⚠ Customer does not share invoice information.</p>

[Need Help?](#)

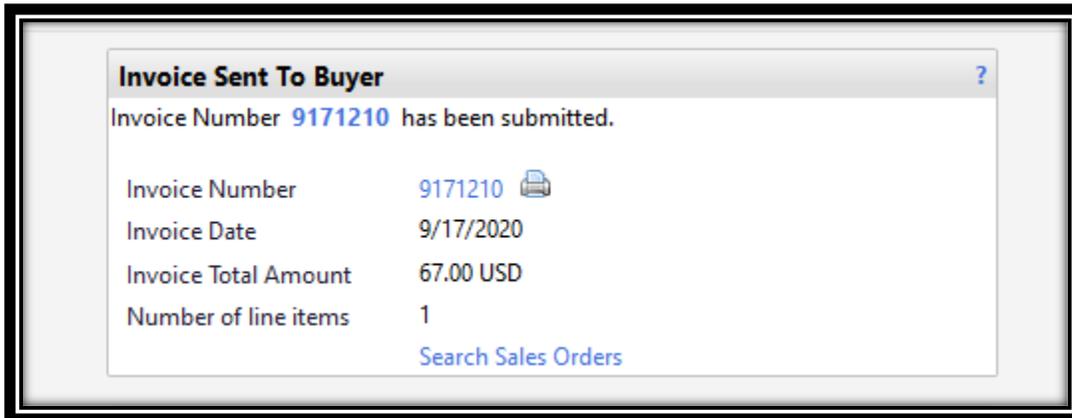
- If you have an Attachment select, **Add Attachment**.
- Start reviewing the pre-populated information, if necessary update the field.
- **Note:** If the *Remit To Address* is incorrect, please update your vendor registration.

Payment Terms	Attachments								
<p>Due Date 9/27/2020</p> <p>Payment Terms <input type="text"/> % <input type="text"/> Days <input type="text"/> 27 Net</p> <p>Discount 9/27/2020</p> <p>Estimated Discount Amount 9.38 USD</p>	<p>Attachments</p> <p>Attachments</p> <table border="1"> <thead> <tr> <th></th> <th>Size</th> <th>Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>P0005251-1016.pdf</td> <td>57.0 KB</td> <td>9/17/2020</td> <td>Remove</td> </tr> </tbody> </table> <p>Add Attachment</p> <p>Customer Uploaded Attachments</p>		Size	Date		P0005251-1016.pdf	57.0 KB	9/17/2020	Remove
	Size	Date							
P0005251-1016.pdf	57.0 KB	9/17/2020	Remove						
Shipping Info	Tax, Shipping & Handling								
<p>Notes <input type="text"/></p> <p>1000 characters remaining expand clear</p> <p>F.O.B. <input type="text"/></p> <p>Shipping Address</p> <p>ATTN: Kortne Gilbert 1001 West Franklin Street Floor 5 Richmond, VA 23284 United States</p>	<p>Discount <input type="text" value="0.00"/></p> <p>Tax 1 <input type="text" value="0.00"/></p> <p>Tax 2 <input type="text" value="0.00"/></p> <p>Shipping <input type="text" value="0.00"/></p> <p>Handling <input type="text" value="0.00"/></p>								

For Shipping, you may enter any notes in the "Shipping Info" section of the draft Sales Invoice.

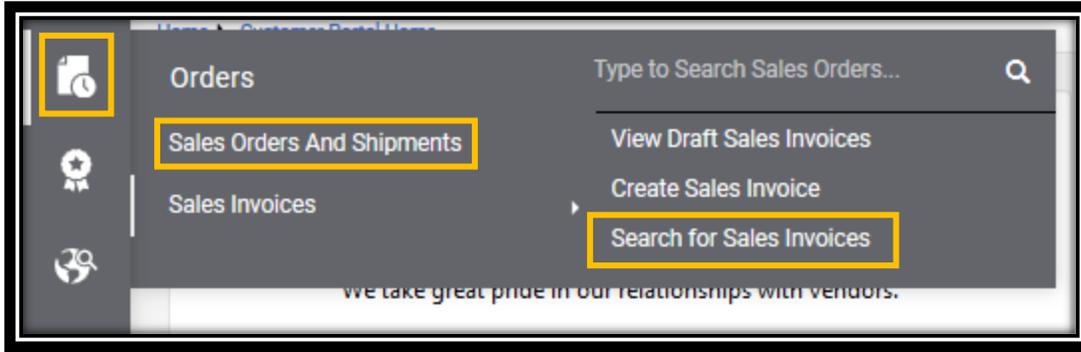


- To update the line items, select **Actions**
- Choose **Edit**
- If the Invoice, is less than what has populated in the Quantity or Unit Price field you should edit that field.
 - **Note:** Do **NOT** enter a Quantity or Unit Price that is greater than the Sales Order amount. This will cause an error. Instead, contact the [RealSource HelpDesk](#) or the Department who placed the order with your company.
- Once you have updated the Invoice, select **Save**
- Review the invoice in it's entirety. If the invoice reflects the correct information, select **Send To Customer**.



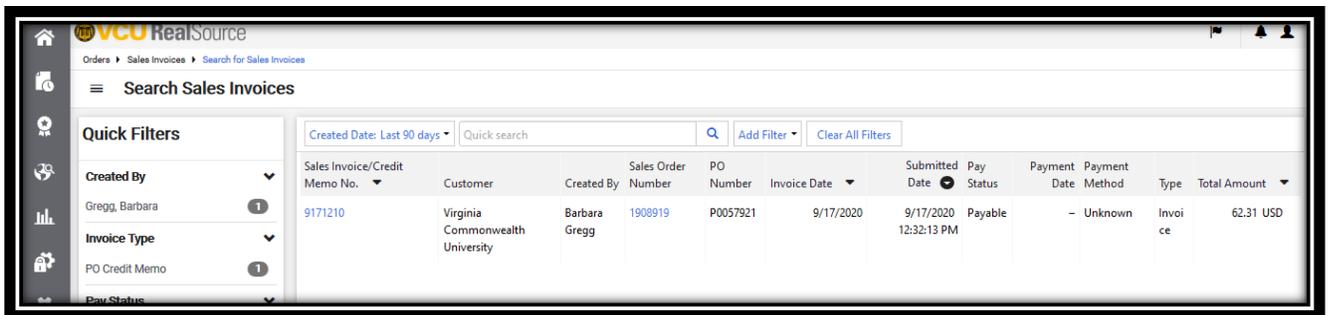
5. Searching for Sales Invoices

From the RealSource Homepage, choose the **Orders** Icon



- Select **Sales Invoices**
- Select **Search for Sales Invoices**

From here, you can see the Sales Invoices submitted by your company. VCU does not share certain information such as the Payment Method. However, they do share the Pay status. There is three main payment statuses; In Process, Payable and Paid.



6. Invoice Statuses

In Process	Invoices in this status lack information that is needed from the Department. The Department will receive a daily reminder to take action on this invoice.
Payable	Invoices in this status have received the required action from the Department, but their payment date is still in the future.
Paid	Invoices in this status have been paid and issued to the company/payee.

7. Invoice Table

Invoice Received Date(*)	This date will auto-populate and is a Required field.
Due Date	This date can be altered, but you must select a date from the calendar in a MM/DD/YYYY format.
Invoice Owner	This field will auto-populate to the VCU point of contact (person who created the PO).
Vendor Invoice Number(*)	This is the invoice number that should be used solely by you.
Remit To	This address is listed in RealSource as the payment address. If there is more than one address in the system, you may select the dropdown.
Line Items	This is entered exactly as the department has entered it. You may update the Unit Price/ Quantity only after you have discussed this with the department first before submitting an invoice. While this can be done before discussing with the department, this should not be done and can result in late payments.
Discount	If there is a discount it will be prepopulated. This is an early payment discount and should not be changed.
Sales Tax	
Local Tax	
Shipping	
Handling	

- You can attach your own internal invoice to the record or other related documentation.
- It is important to follow the format of the form, without changing the Unit Price. If the Unit Price or quantities are wrong, you must first coordinate with the VCU department to correct your PO.
- Once you have completed filling out the form and attaching documents, you can submit it. Once submitted the invoice will be routed to VCU's Accounts Payable department for processing.

- If you have submitted your invoice appropriately, you will receive an email for verification (see below). If you do not receive the email verification or have questions about completing/filling out the form, contact the [RealSource HelpDesk](#).



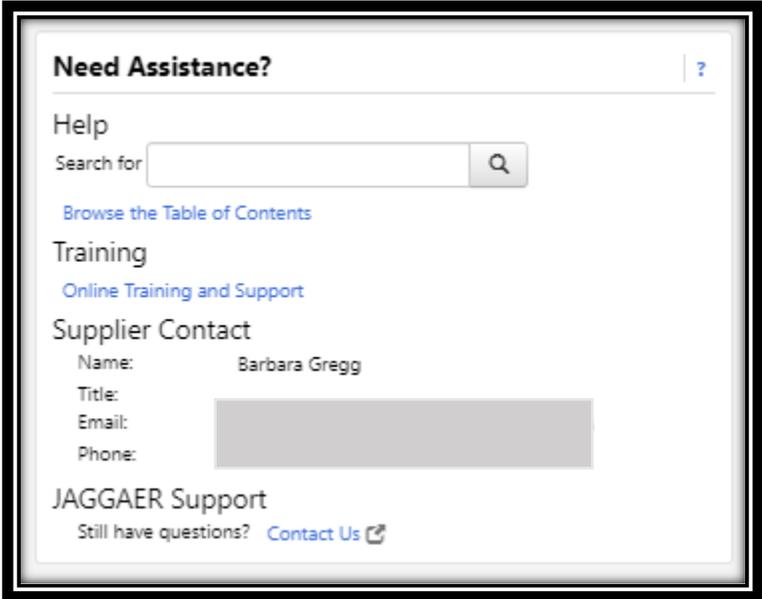
- Accounts Payable will coordinate approvals of the invoice with the VCU department. Provided the invoice you submitted appropriately matches to your VCU PO and the department has approved the invoice, you will be paid within 27 calendar days of your invoice submission unless the department has requested expedited payment.
- Payments are generally made by check and sent via the USPS and can take from 7-10 days to receive.
- If you have questions about creating the invoice, contact the [RealSource HelpDesk](#).

G. WHERE TO GET HELP?

Email: RealSource@vcu.edu

Phone: 804-828-1077, option 6

JAGGAER Help: From the JAGGAER homepage you can request help. You can enter topic into the search bar or, Browse the Table of Contents for the JAGGAER manuals. You can also request online support/training.



If you would like to speak with someone, you can select Contact Us. You will be able to fill the form for additional questions or can give JAGGAER a call at 1-800-233-1121.

Department: For direct questions about the Contract, PO or Invoice status, please reach out to the VCU Department who has contacted you to do business with VCU for help.