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.

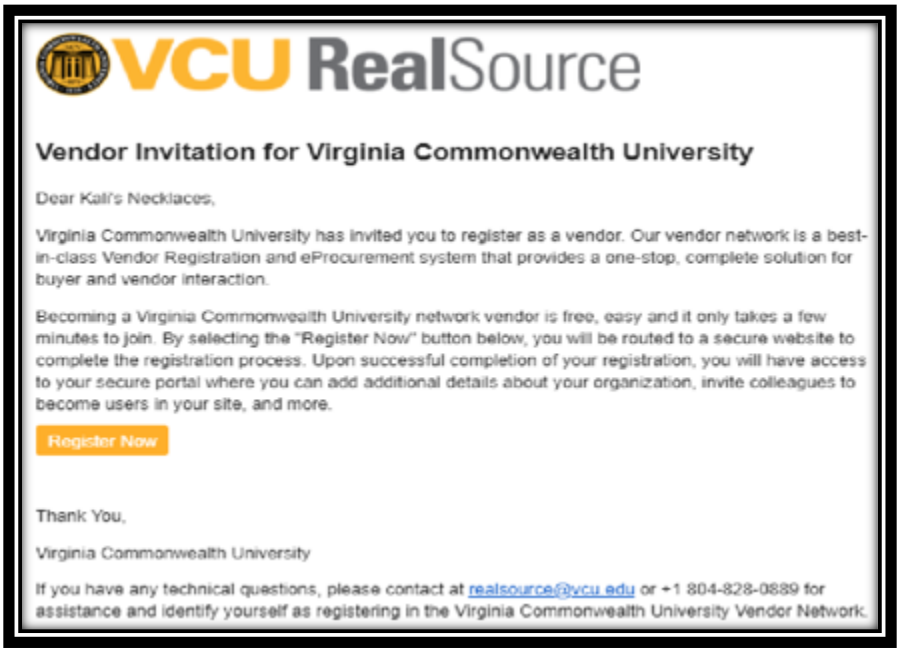
2. Browser Compatibility

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.



VCU RealSource

Vendor Invitation for Virginia Commonwealth University

Dear Kali's Necklaces,

Virginia Commonwealth University has invited you to register as a vendor. Our vendor network is a best-in-class Vendor Registration and eProcurement system that provides a one-stop, complete solution for buyer and vendor interaction.

Becoming a Virginia Commonwealth University network vendor is free, easy and it only takes a few minutes to join. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more.

Register Now

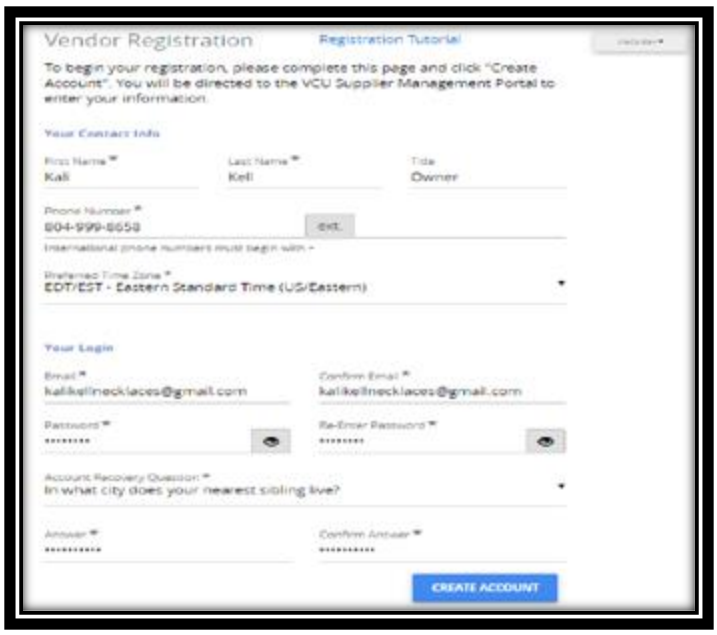
Thank You,

Virginia Commonwealth University

If you have any technical questions, please contact at realsource@vcu.edu or +1 804-828-0889 for assistance and identify yourself as registering in the Virginia Commonwealth University Vendor Network.

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.)



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

<u>Contact Information:</u>

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

<u>Login Information:</u>

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

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

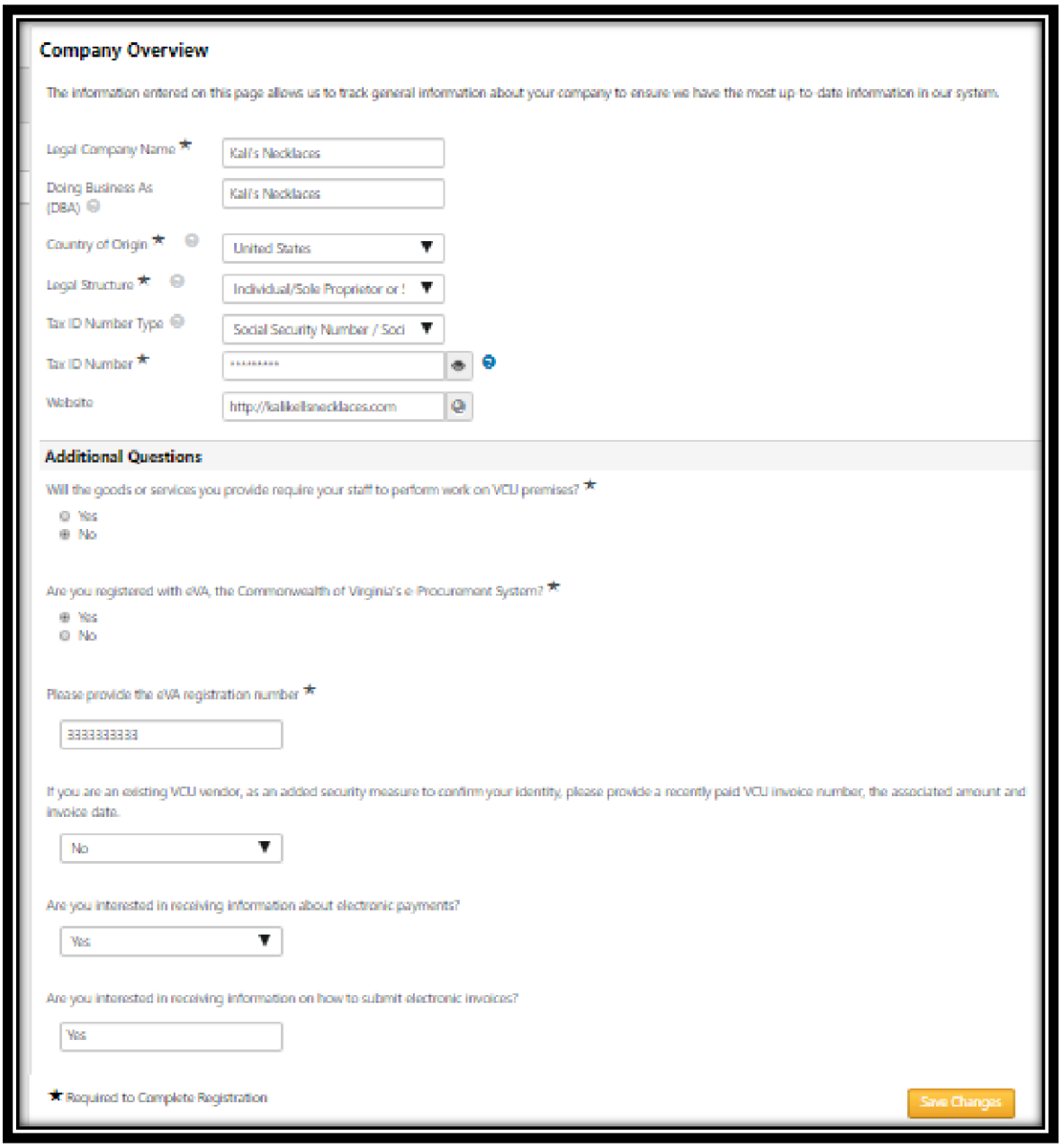
Begin verifying and entering the following information.

- 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 receiver, 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

- 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

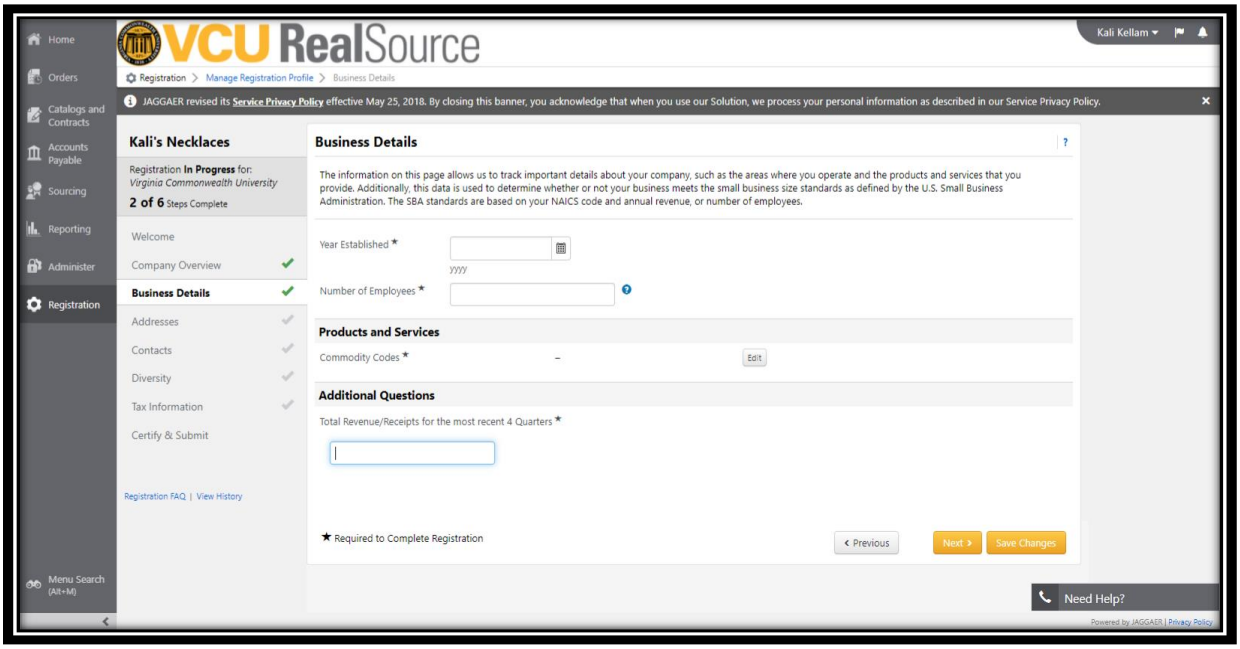
then become optional.
- Tax ID Number (*)
- Website

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.



Business Details

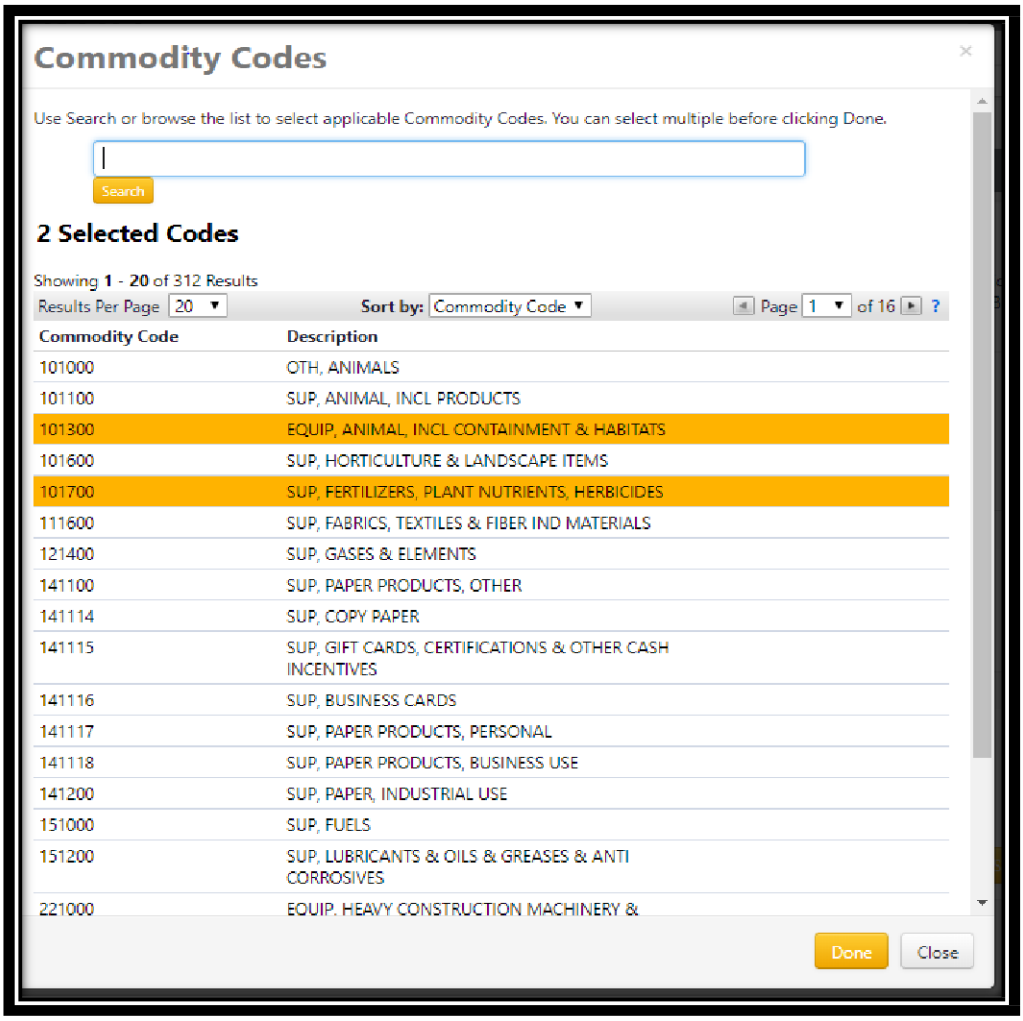
- Enter the year your firm was established (*)
- Enter the correct number of employees (*)

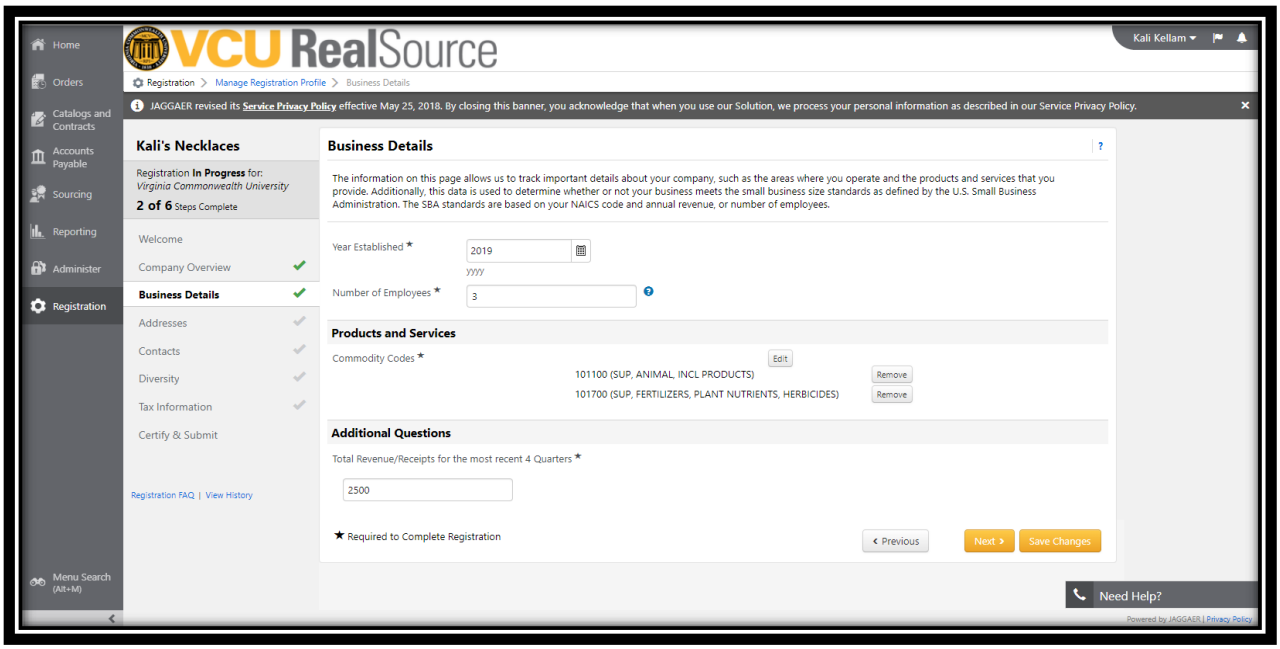
Additional Questions

- 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.





- Select **Next**

4. Addresses

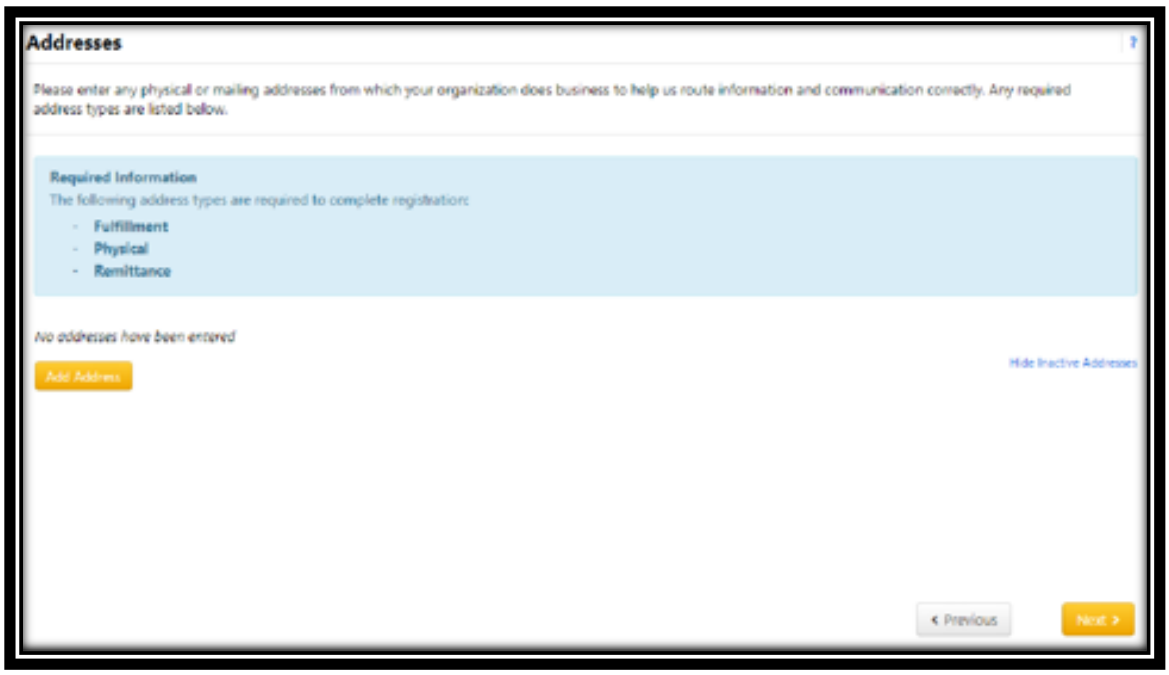
Enter the following addresses for the organization. Vendors are required to enter fulfillment, physical and remittance addresses.

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**

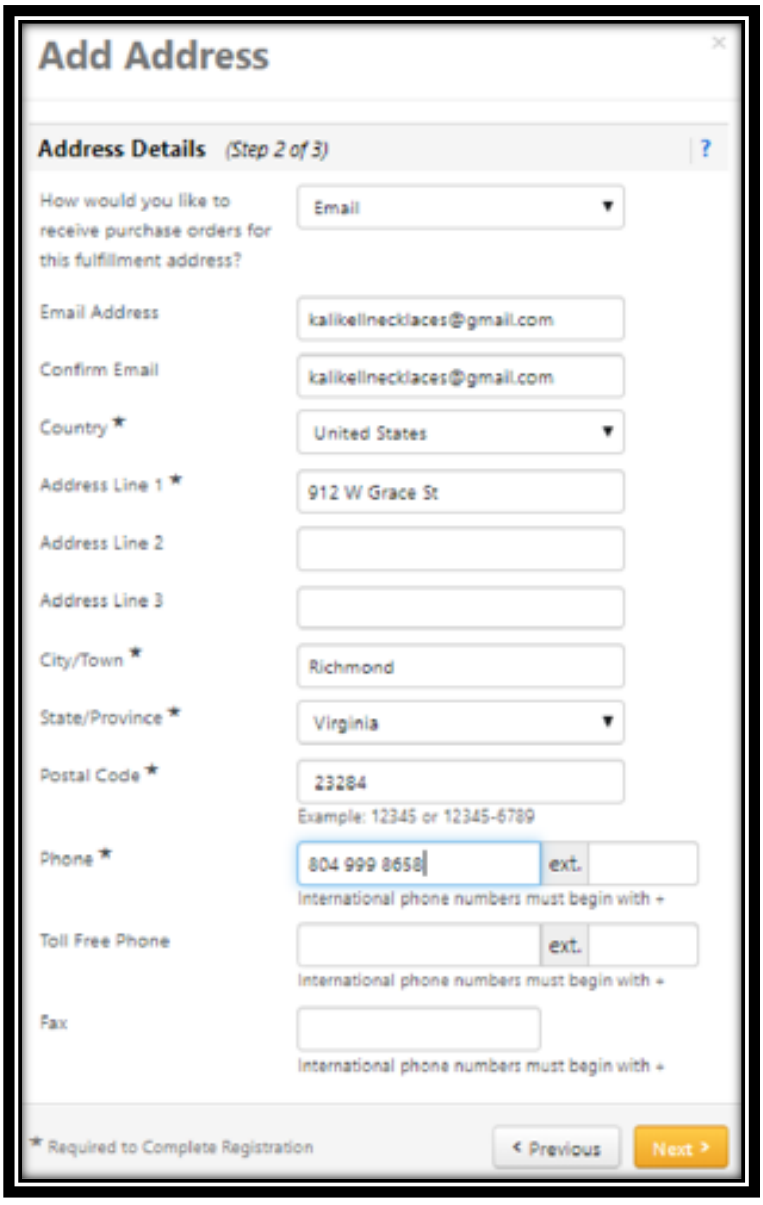
Basic Information

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.



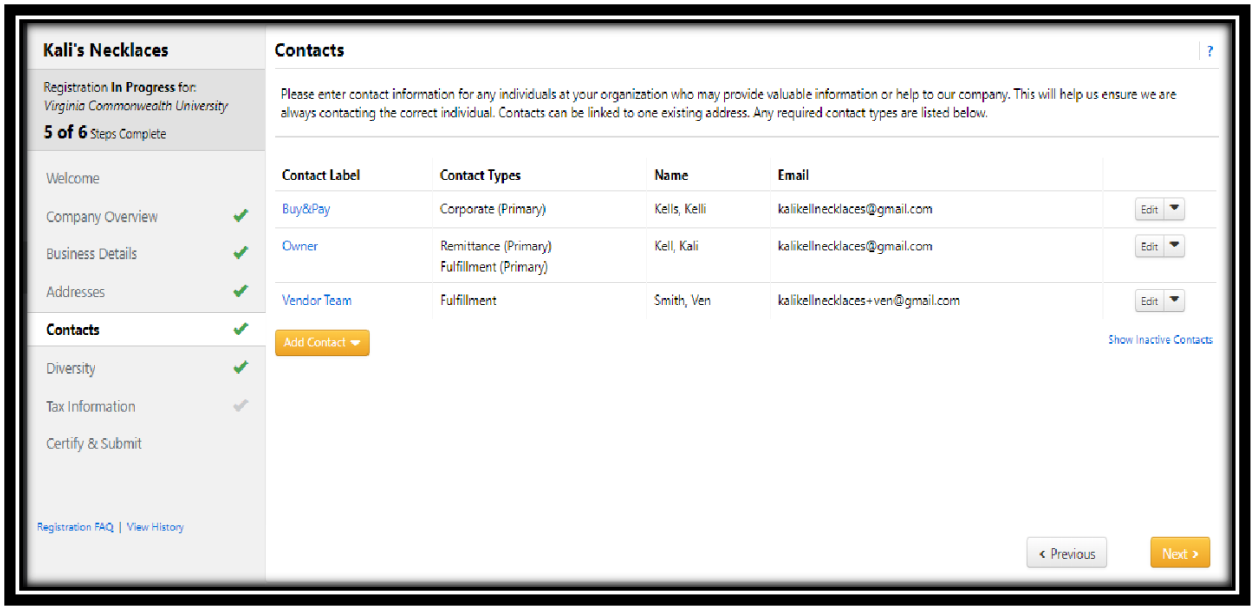
- Primary Contact For This Address
  - Enter the following address information. Complete all applicable fields, required fields are noted with an asterisk (*) as seen below.
  - Contact Labels are the naming preference for the contact. If the contact added is the Owner or President, add that information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

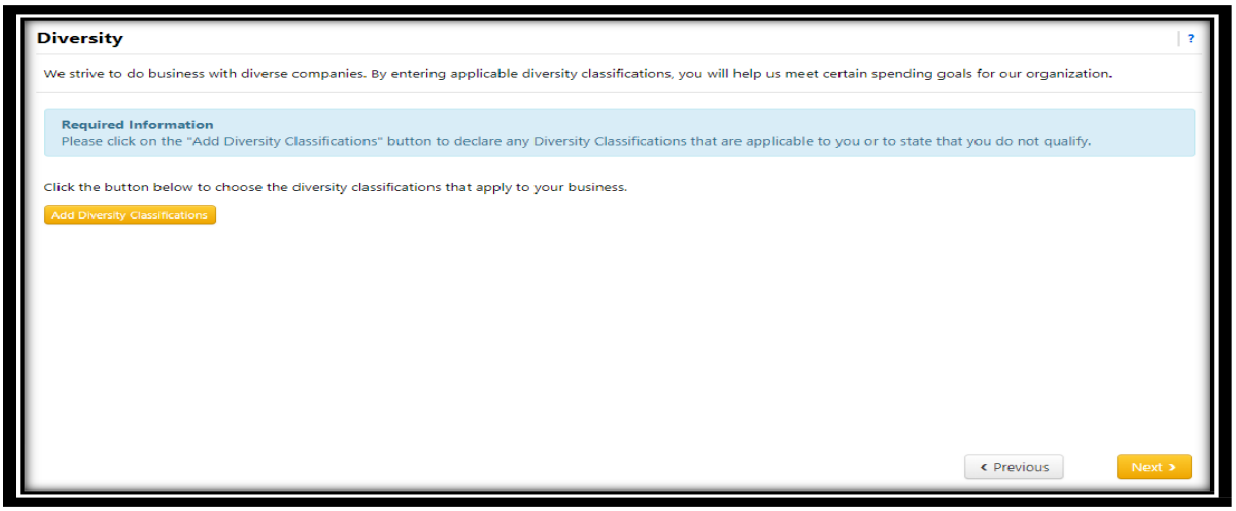


- Select Add Contact
- Select Next

6. Diversity

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

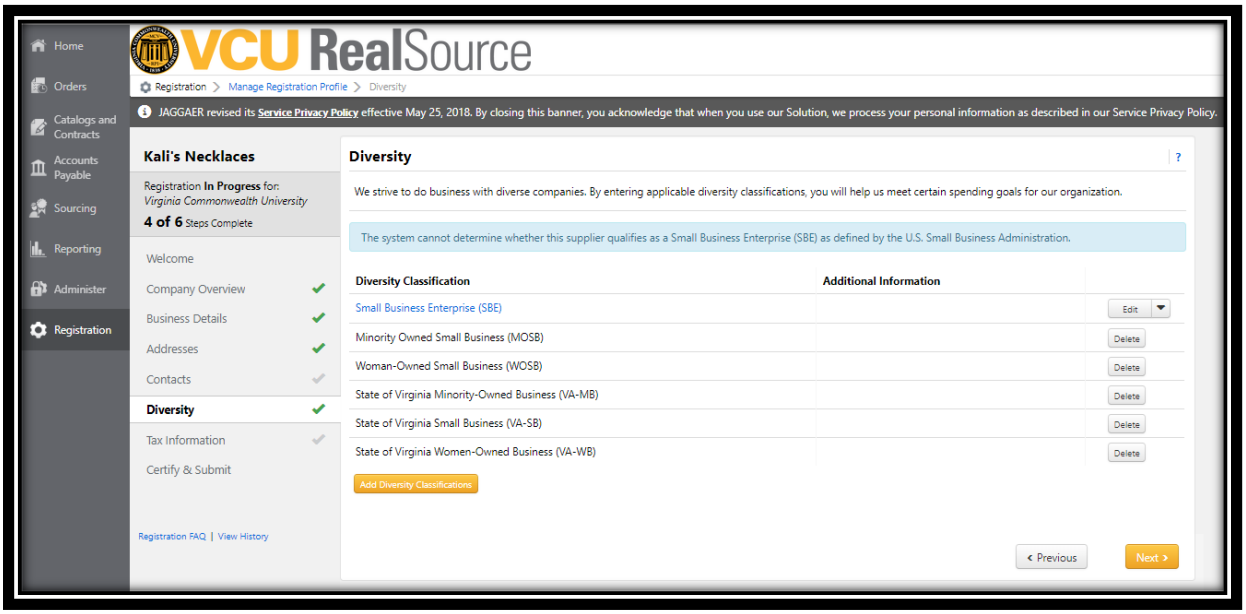
- Diversity
- Select **Add Diversity Classifications**
- If the firm is not a diverse vendor, this may also be indicated in this section.



- If your firm does not hold any of these certifications, please indicate this by selecting "Not a state-certified supplier."
- **Foreign vendors** must also chose this option as this classification only applies to domestic vendors.

<u>Federal and Diversity Classifications</u>

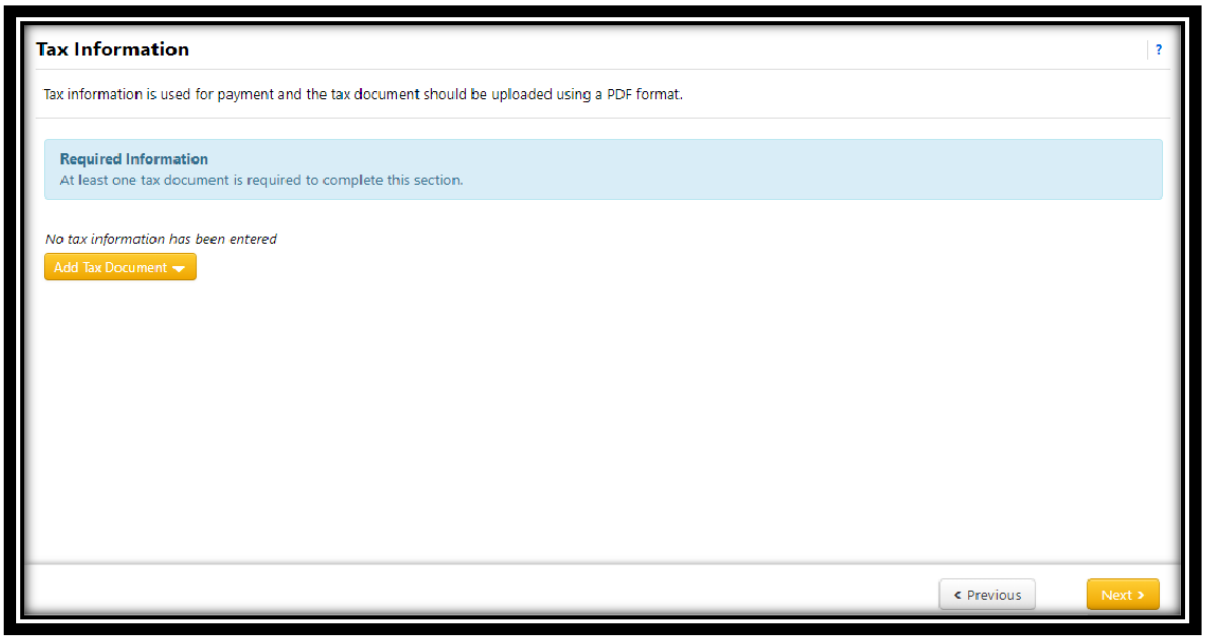
- Select the Federal and State Diversity Classifications that applies to your organization



- Select **Next**

7. Tax Information

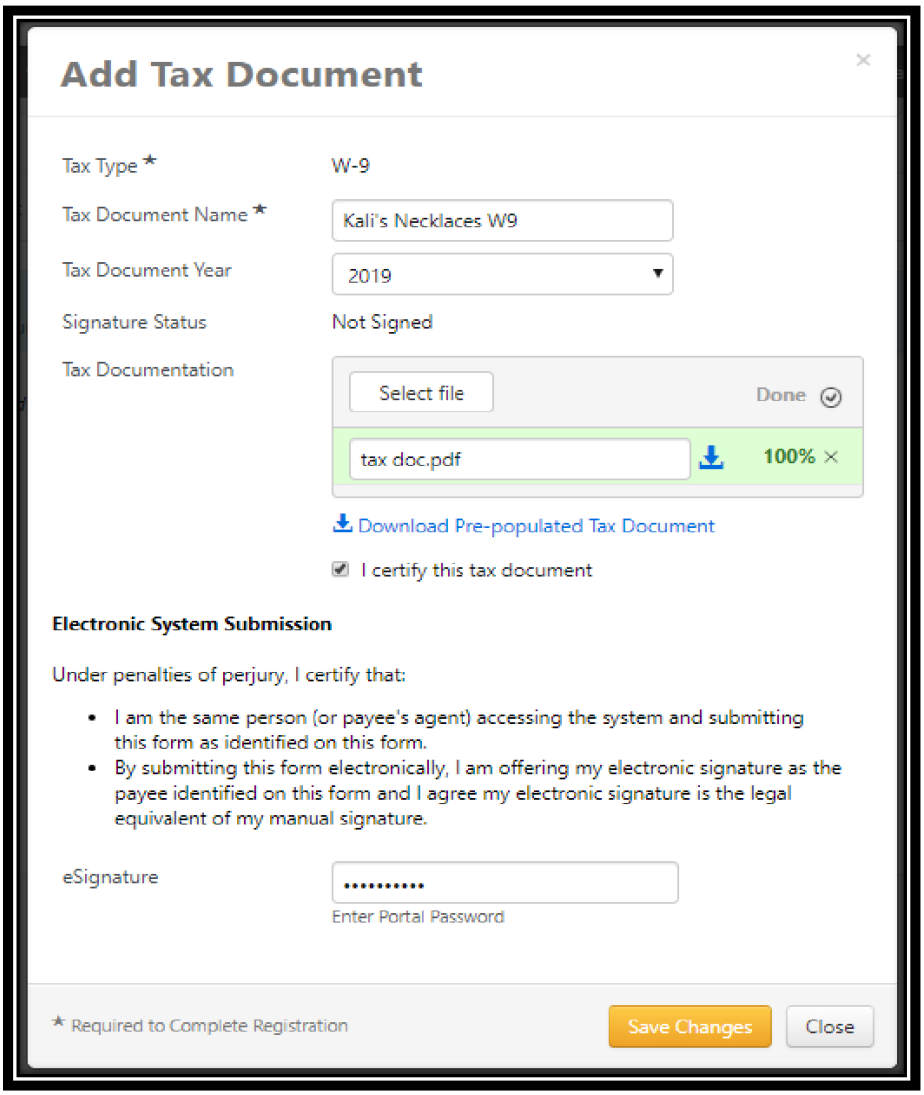
As a vendor, your business is required to provide a copy of your tax document (W9, W8, etc.). You may choose to use the pre-populated document that has been completed by RealSource based on the information you have provided in the registration.



Tax Information

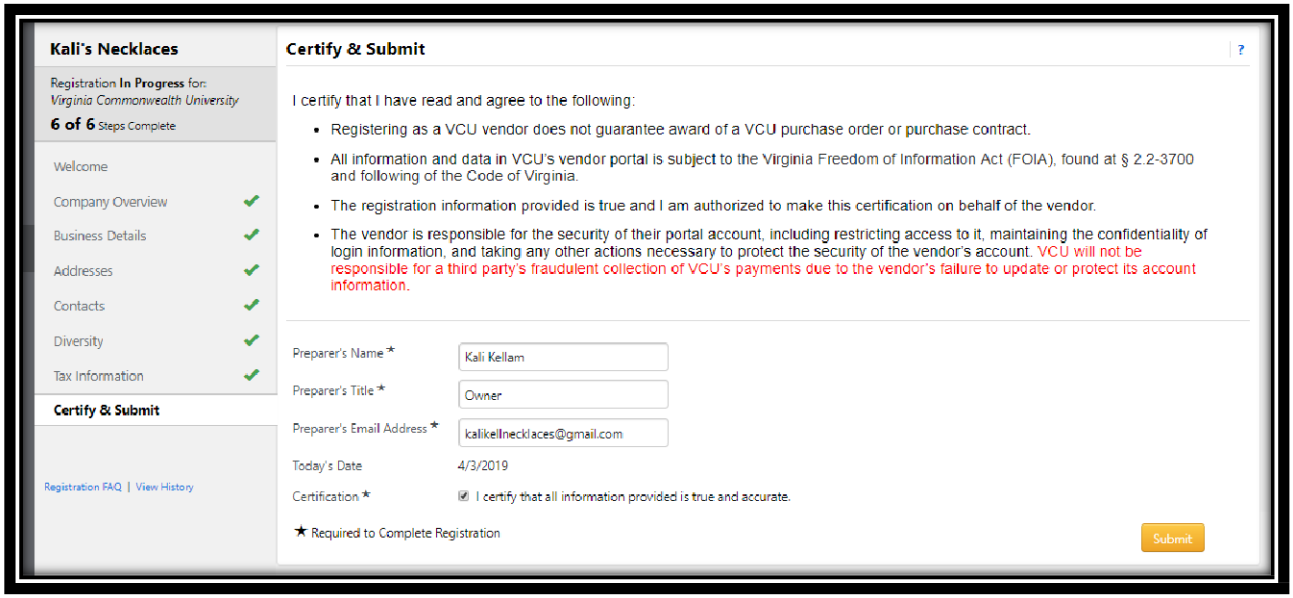
- Select **Add Tax Document**
- Complete the form

Add Tax Document Screen



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

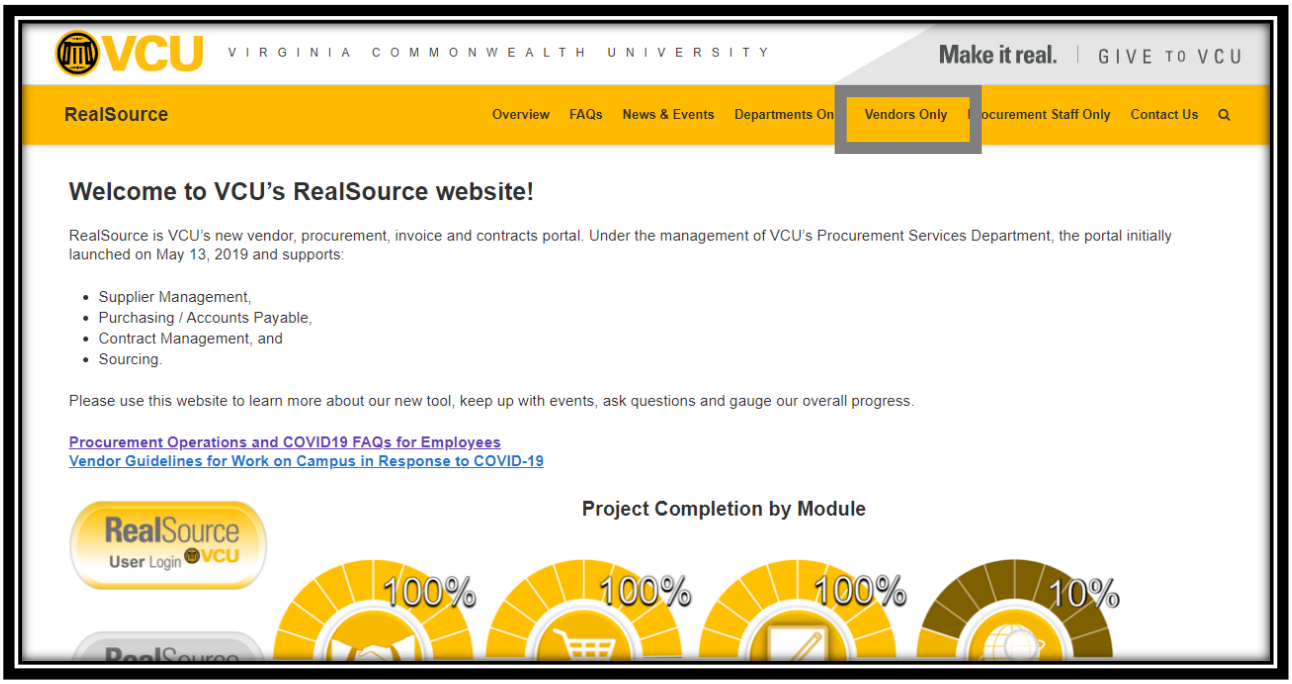
8. Certify & Submit



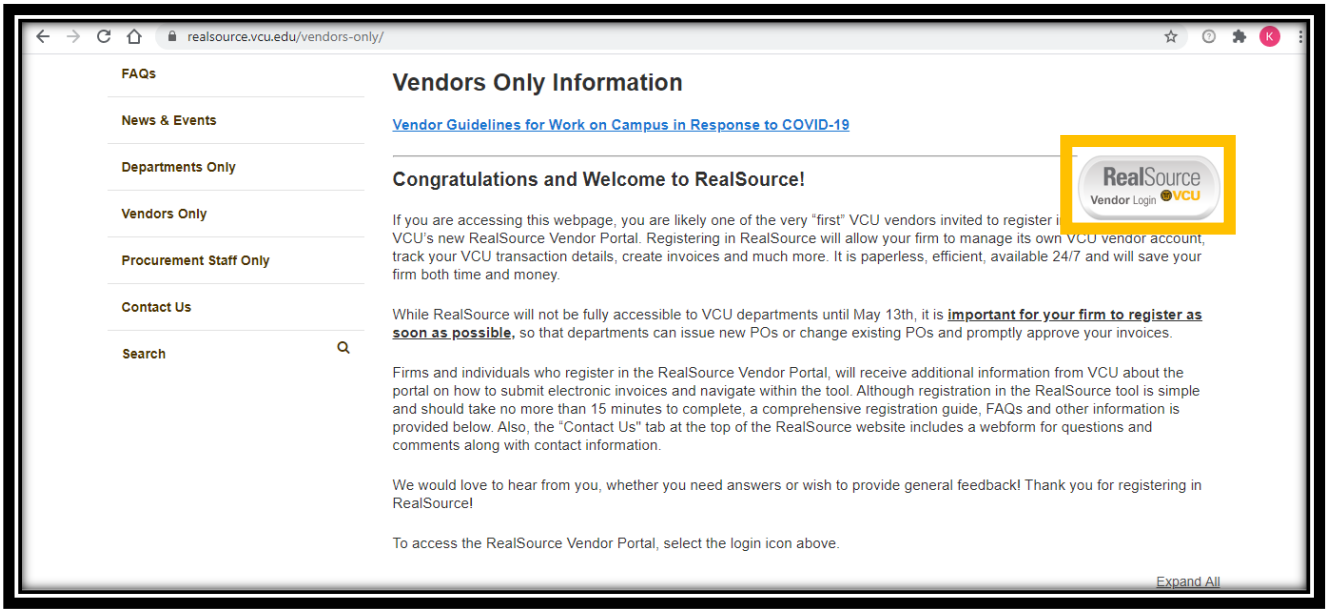
- Please carefully read all of the information presented above.
- If all information looks "ok," check (✓) the Certification* field to certify that all information provided is accurate for your organization.
- Select **Submit**
- You will receive a confirmation email from VCU RealSource notifying your 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

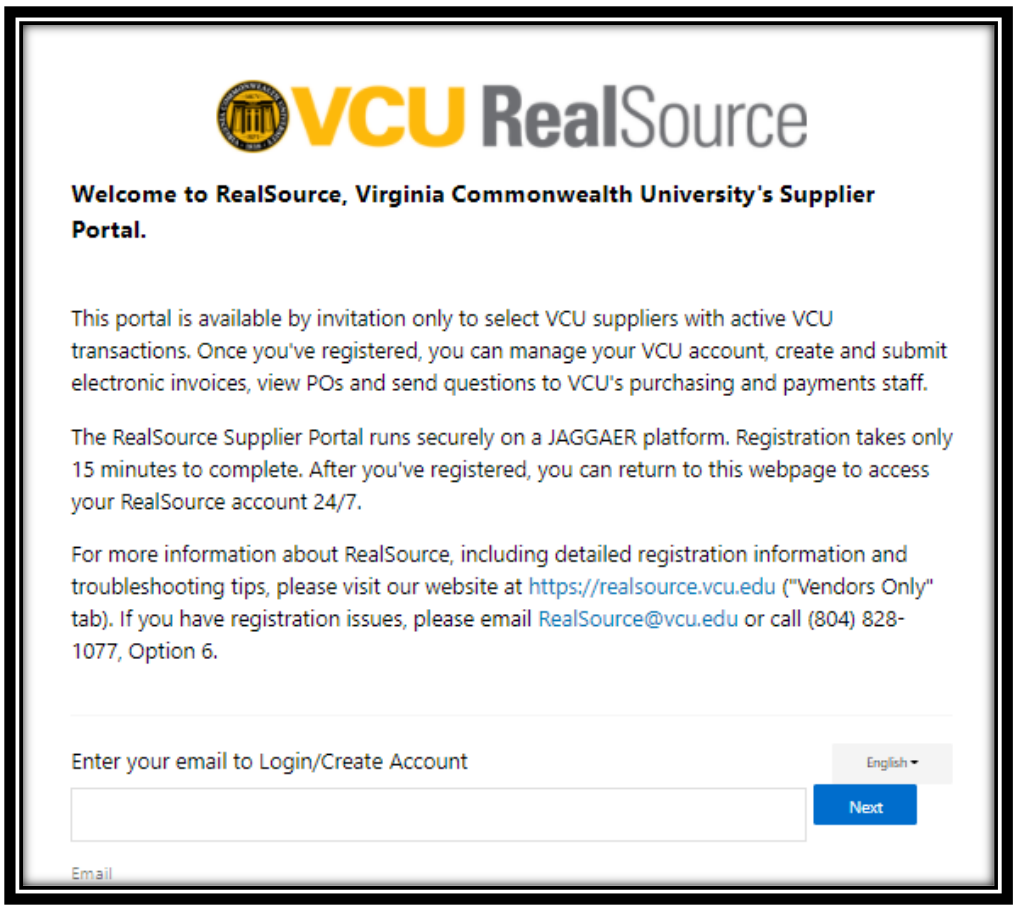
This login link is for active and fully registered vendors only.



- Visit the RealSource Website, and select the Vendors Only tab.

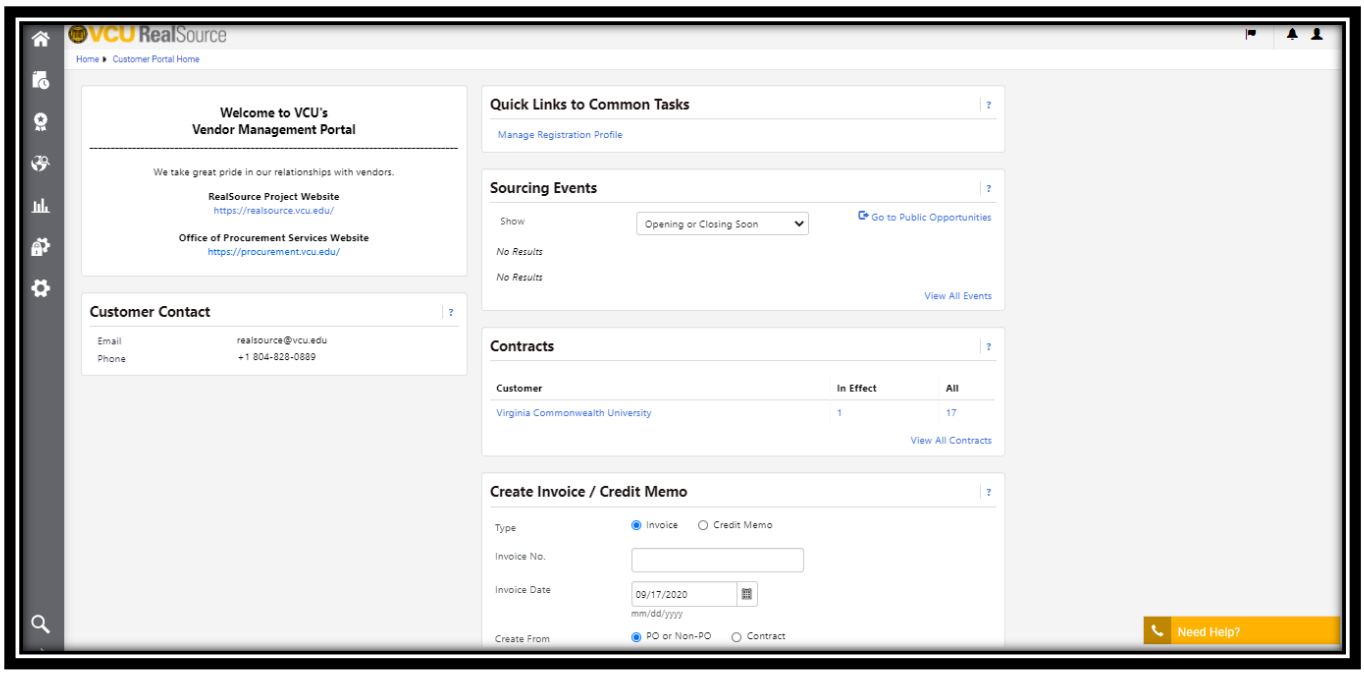


- Once you have selected the Vendors Only tab, select the login button shown above. From there, you will be redirected to the RealSource login screen.



- 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.



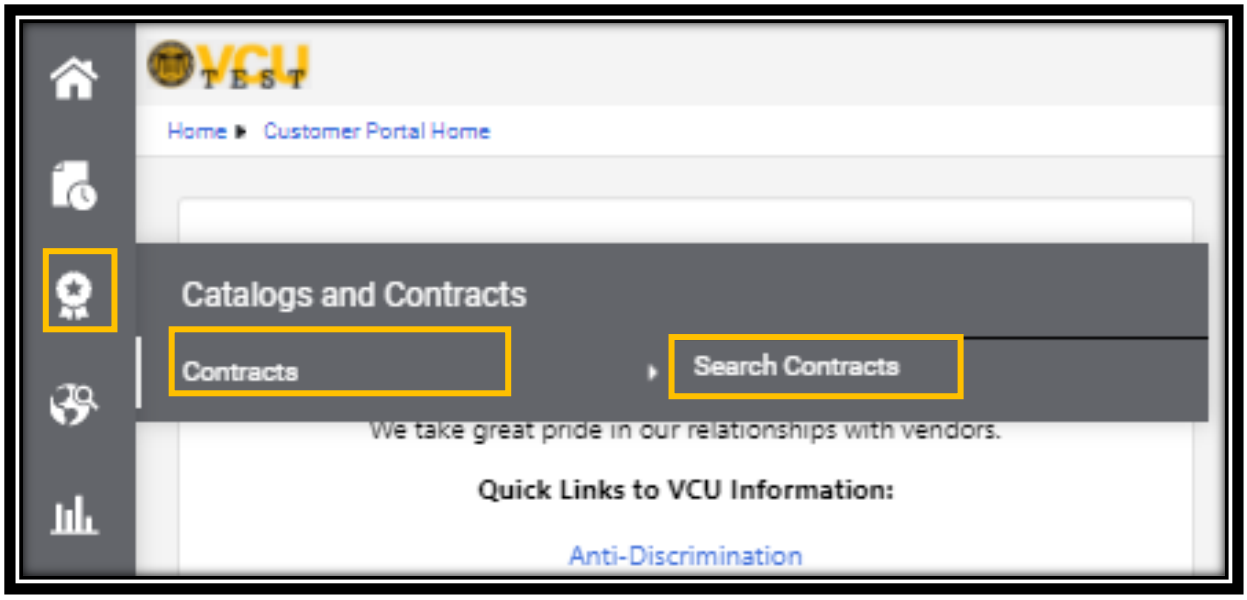
- By logging in to RealSource, you can view and comment on sales orders, review contract information, create invoices and credit memos.

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.

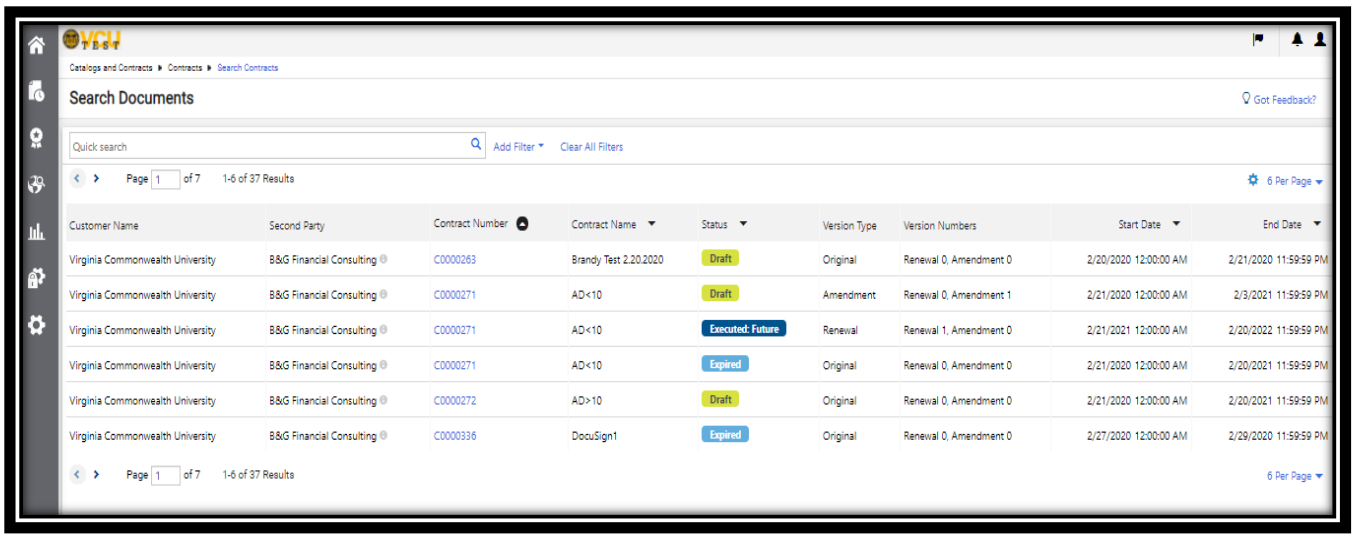
Further, Contracts+ serves as the university's system of record for all purchase contracts and agreements.

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 Secord 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.



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

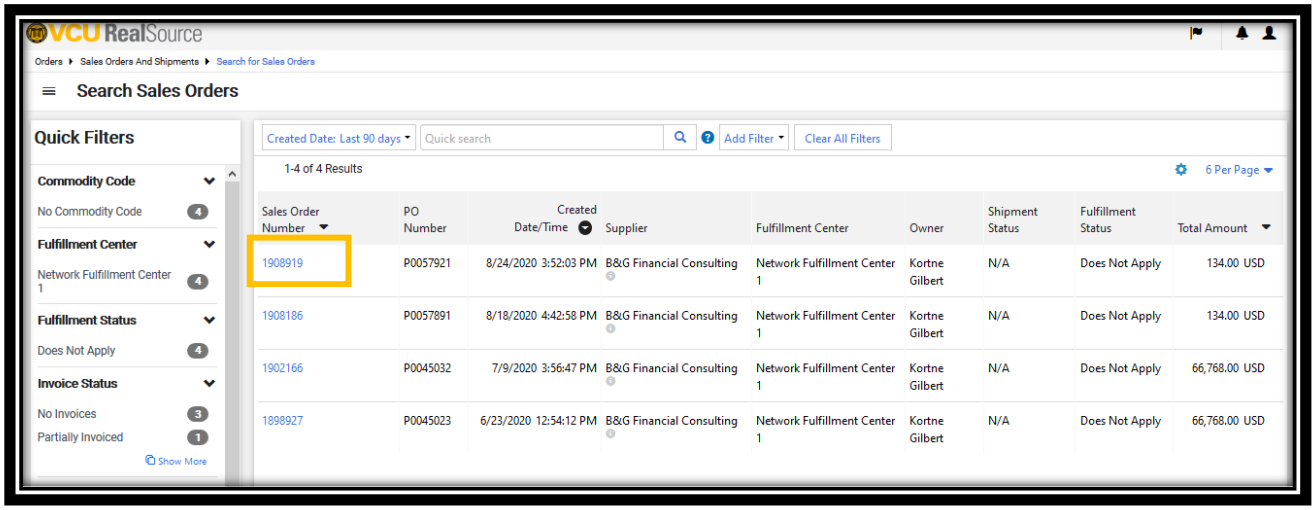
- Contract Number
- Contract Name
- Summary
- Start Date
- End Date
- Attachments include the main contract with your company's signature and any additional attachments that VCU has attached for you to view. You may also download these attachments.
- The Communication Center is not used by VCU.

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.



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 is 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, than they must be submitted to the Bill To address on the Sales Order (PO). The Bill To address is:

PO BOX 3985

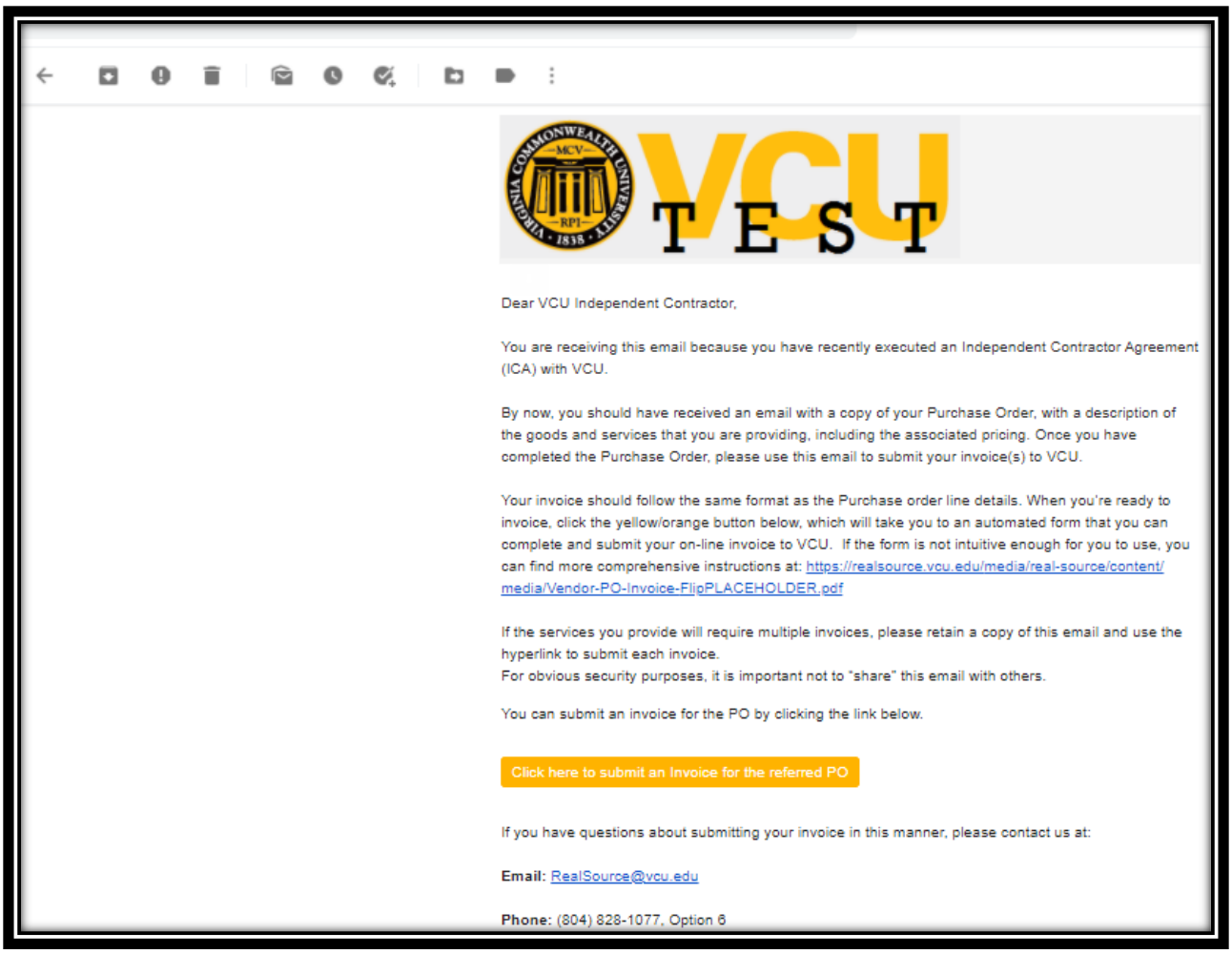
Scranton, PA 18585

3. PO to Invoice Email Flip (ICAs Only)

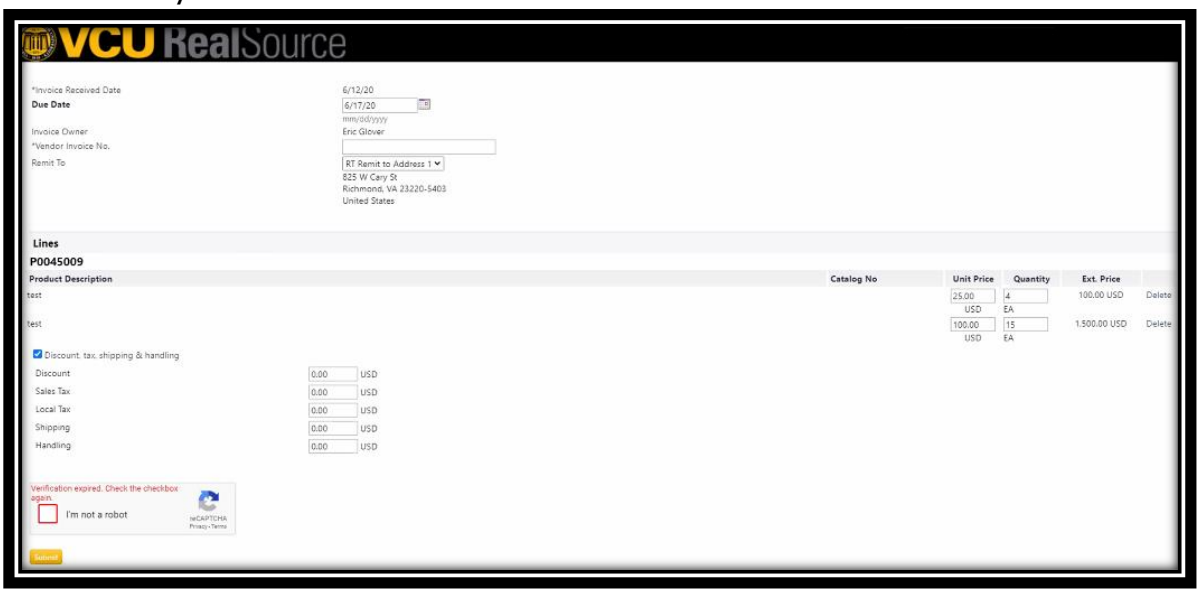
The email is triggered to be sent to you because a VCU department has issued a VCU Purchase Order. RealSource will also send you a special Sales Order number and alert. The following steps apply:

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.

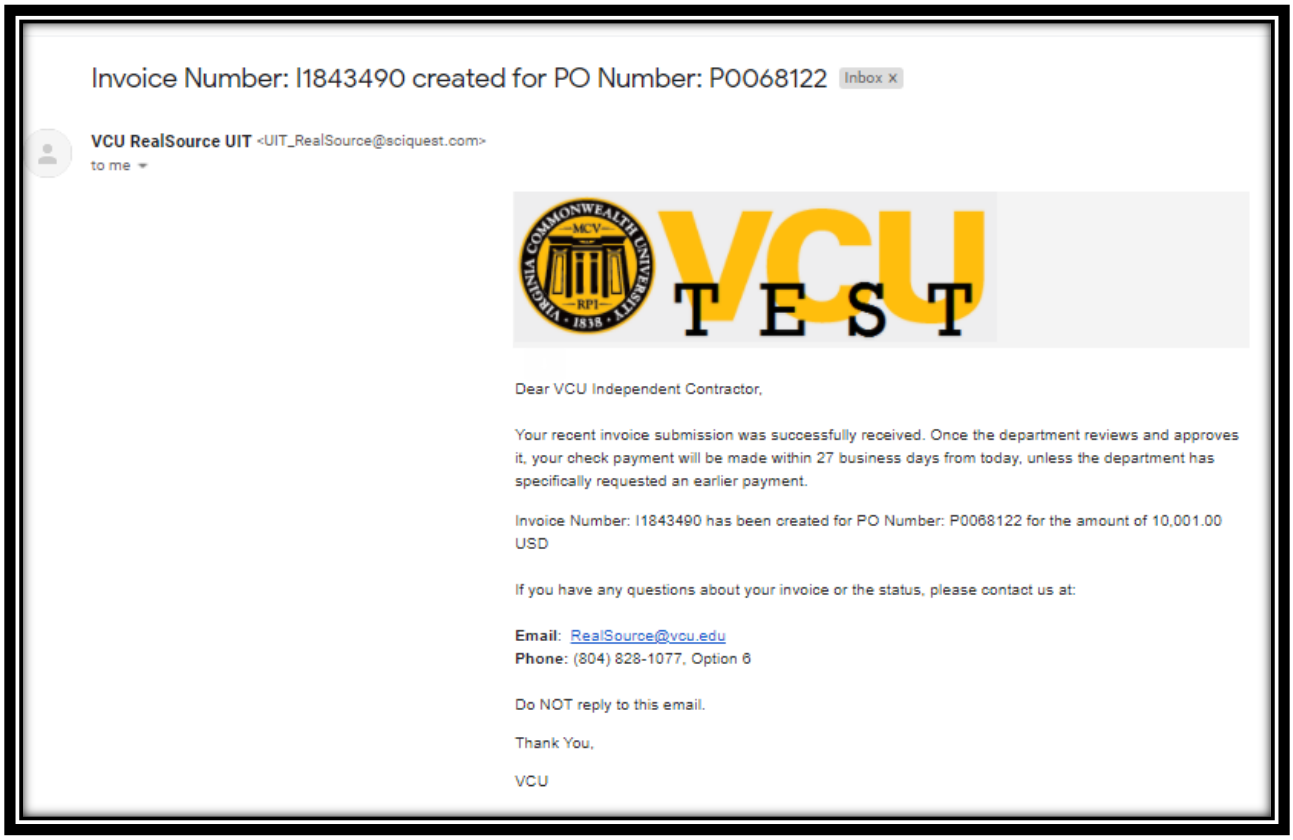
If you intend to submit multiple invoices to VCU against your Purchase Order, the hyperlink can be used to submit multiple invoices. Please safeguard and "do not" share the email; it may only be used by you to submit invoices to VCU.



- 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.



Invoice Number: I1843490 created for PO Number: P0068122 Inbox ×

VCU RealSource UIT <UIT_RealSource@sciquest.com>
to me

VCU TEST

Dear VCU Independent Contractor,

Your recent invoice submission was successfully received. Once the department reviews and approves it, your check payment will be made within 27 business days from today, unless the department has specifically requested an earlier payment.

Invoice Number: I1843490 has been created for PO Number: P0068122 for the amount of 10,001.00 USD

If you have any questions about your invoice or the status, please contact us at:

Email: RealSource@vcu.edu
Phone: (804) 828-1077, Option 6

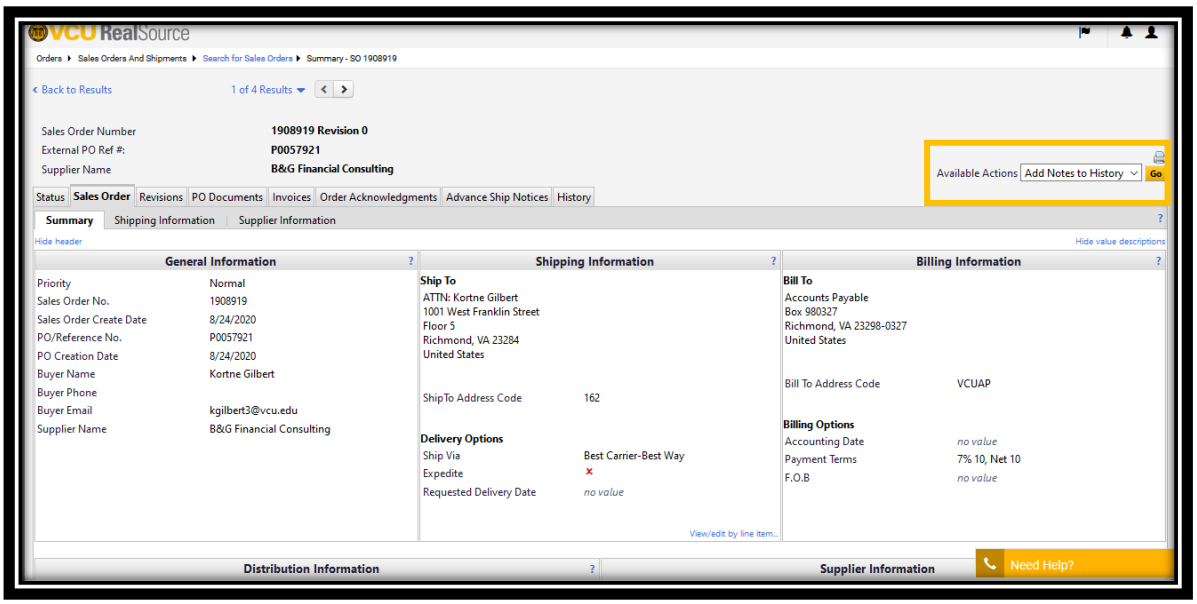
Do NOT reply to this email.

Thank You,

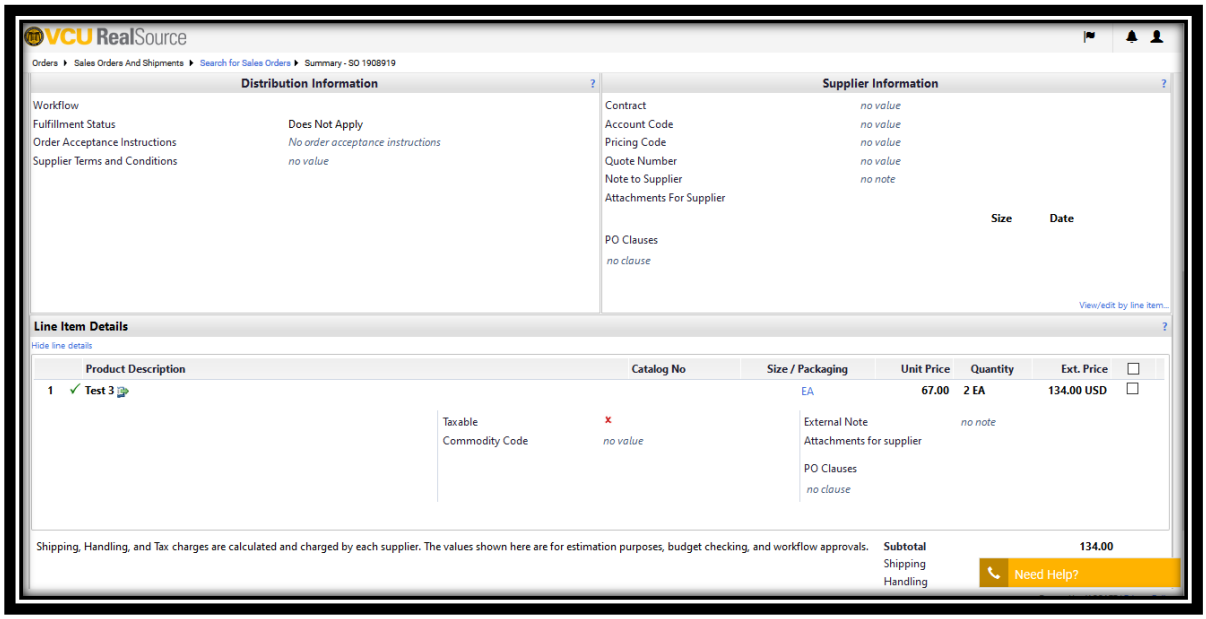
VCU

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.

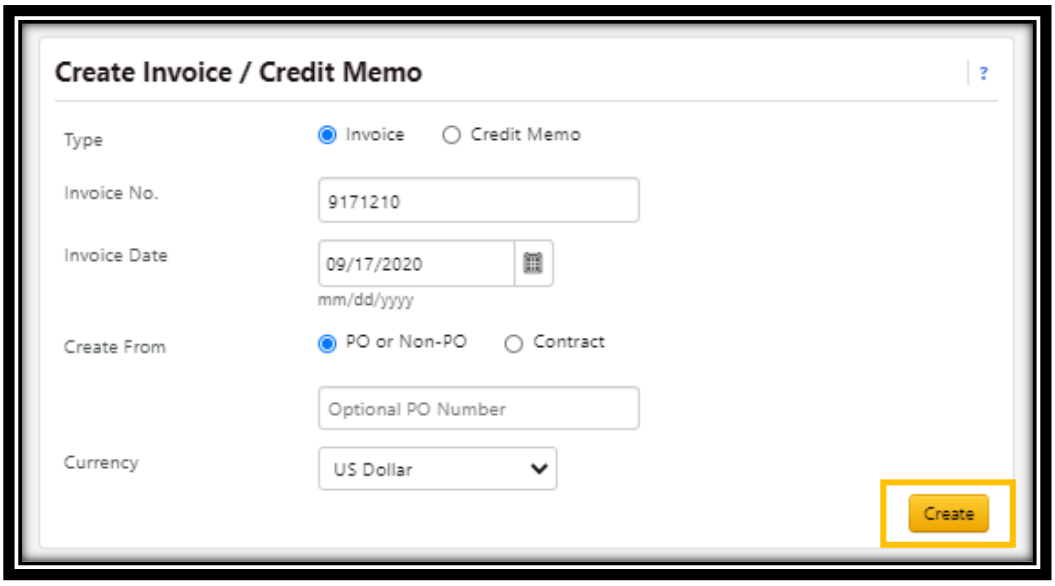


Cont. (Same Screen)



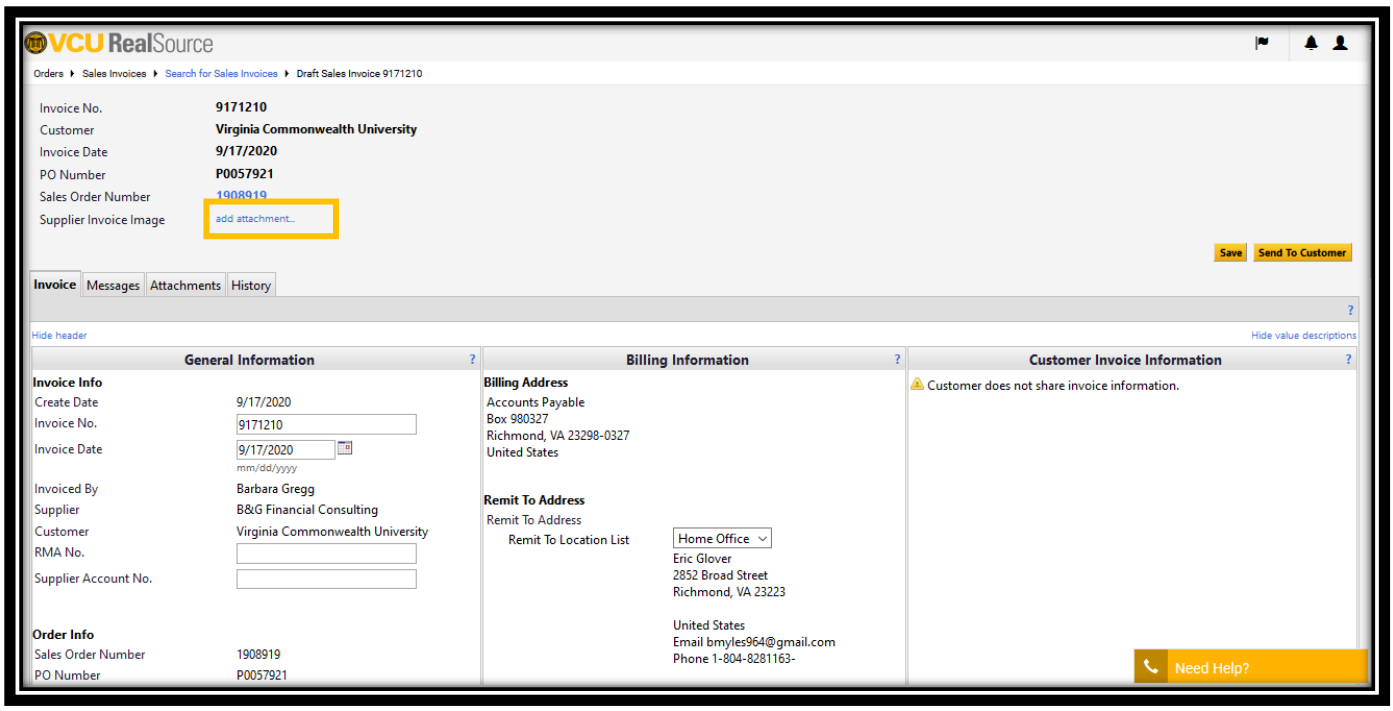
- From the Available Actions drop-down, choose "Create Invoice", then select **Go**.

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

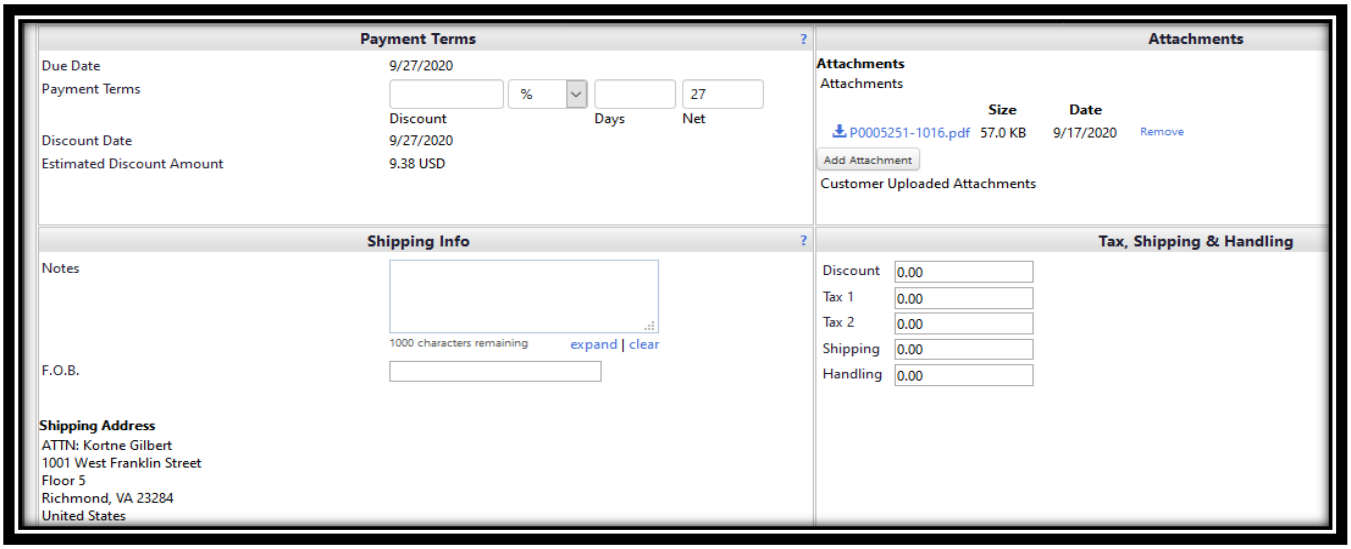


- Type
- Invoice No.
- Invoice Date
- Create From PO or Non- PO Contract
- Optional PO Number – this is required
- Enter your own **Invoice No.**
- Enter the **Invoice Date**
- Select PO or Non-PO
    - Do not select create from "Contract," this field should not be used even if there is a contract associated 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**

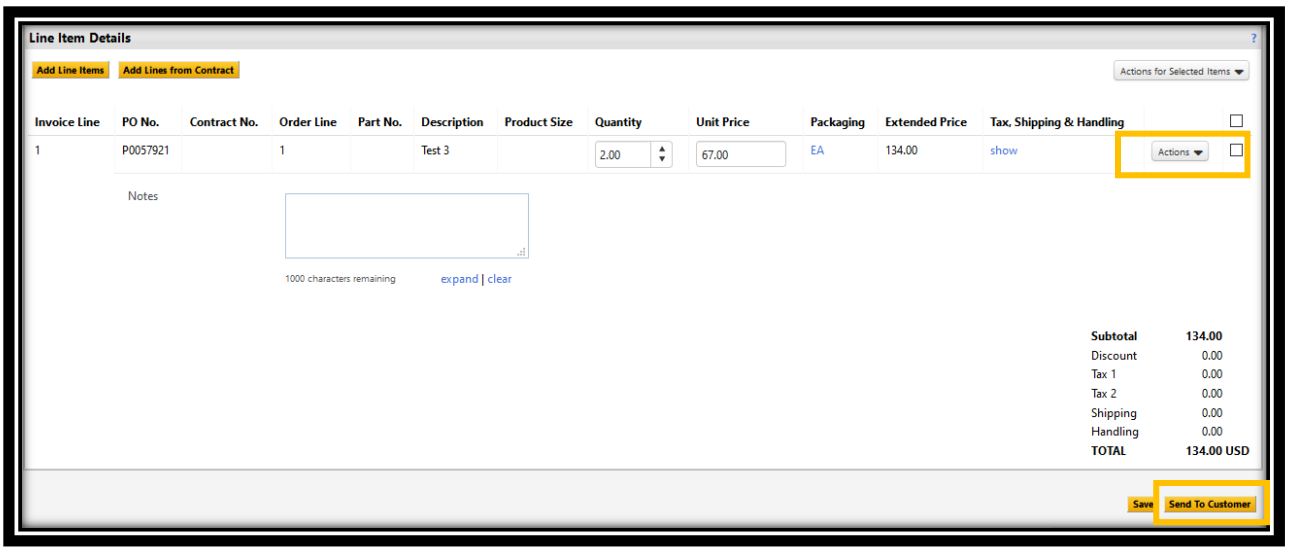
From here, you can begin entering your Sales Invoice. Since you entered the PO number, the PO information will populate.



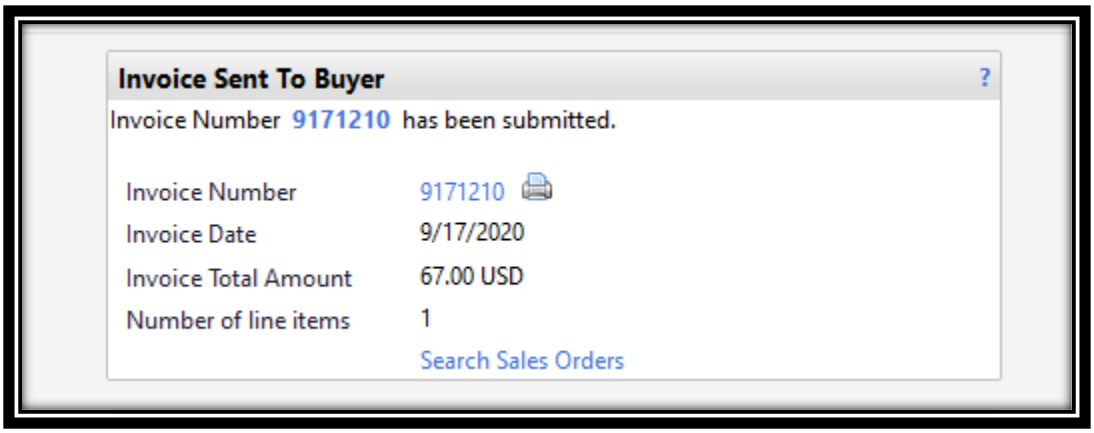
- If you have an Attachment select, **Add Attachment**.
- Start reviewing the pre-populated information, if necessary update the field.
- **Note:** If the *Remit To Address* is incorrect, please update your vendor registration.



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

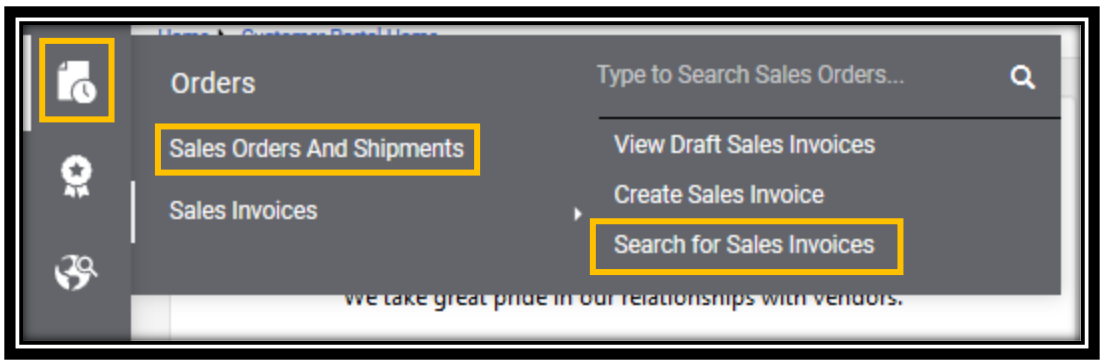


- To update the line items, select **Actions**
- Choose **Edit**
- If the Invoice, is less than what has populated in the Quantity or Unit Price field you should edit that field.
    - **Note:** Do NOT enter a Quantity or Unit Price that is greater than the Sales Order amount. This will cause an error. 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**.



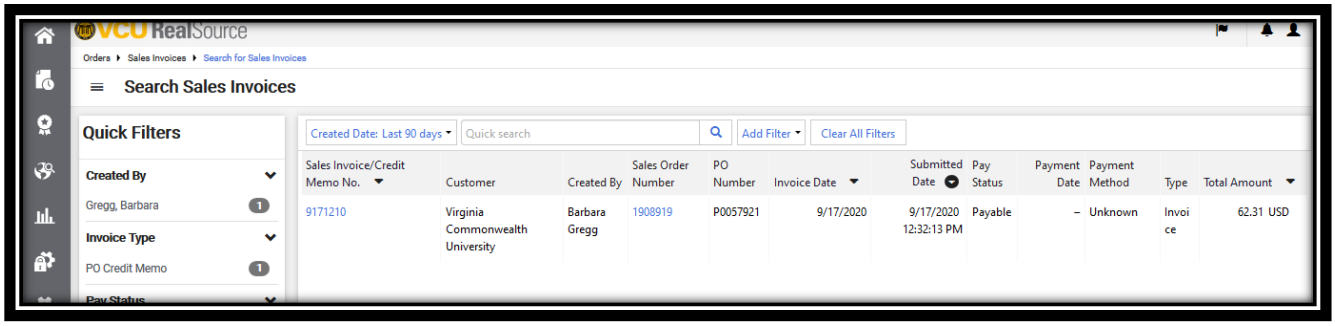
5. Searching for Sales Invoices

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 <u>three</u> 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.

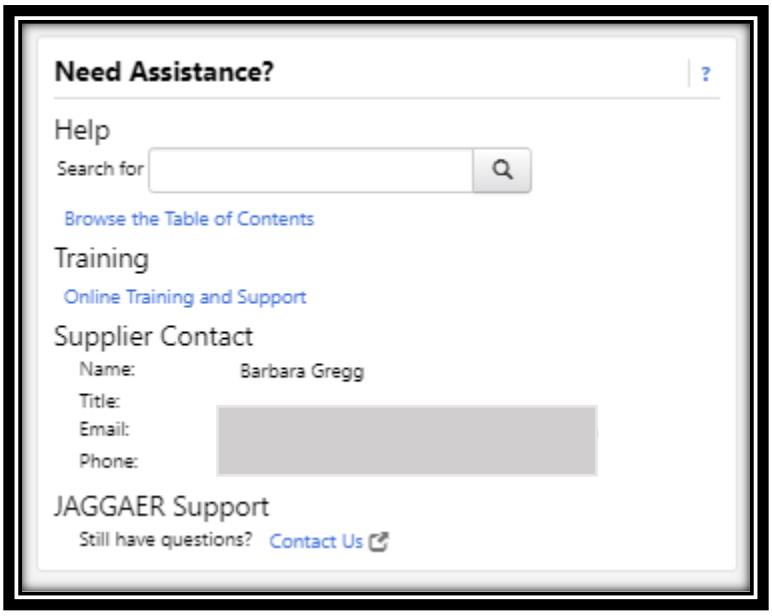
- Accounts Payable will coordinate approvals of the invoice with the VCU department. Provided the invoice you submitted appropriately matches to your VCU PO and the department has approved the invoice, you will be paid within 27 calendar days of your invoice submission unless the department has requested 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.