

# VIRGINIA COMMONWEALTH UNIVERSITY

# **Procurement Services**

Version 1, January 26, 2021

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# A. <u>GENERAL</u>

### 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 <u>here.</u>

### 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.)

To begin your registry	ation, please co	molete this	page and click "C	reate	
Account". You will be enter your informatio	directed to the	VCU Suppl	er Management	Portal to	
Your Contact Info					
First Name *	Last Native *	C	Title		
Kali	Kell		Owner		
Prione Humber * 604-999-6653		ext.			
International prione numb	ers must begin wit	P5.+			
Preferred Filtre Zone *	The second se				
EDI/EST - Lastern Sta	RIGHTD TITLE (G)	2/Fattellu)			
EDT/EST - Eastern Sta	NIGHTO TITLE (G.	S-Fezzellu)			
EDT/EST - Eastern Sta	none intero	2-Cesseria)			
Your Legin	and an interest	2-Castern)			
Your Login	aloaro nine (o.	a castern)			
Tour Legin Drail <sup>18</sup> Kalikelineckiaces/Ben	nail.com	Control E katikelin	nal * ecklace:@email.c		
Teur Legin Brad * Kalikelinecklaces@gn	nail.com	Contion E katiketin	nai * ecklaces@gmail.c	om	
Your Login Broad * Kalikelinecklaces@gm Passnors *	nail.com	Contron E katikpiin Re-Emar I	mai* ocklaces@gmail.c lassacro≭	om	
Your Login Ernst * Kalikelinecklaces@gm Pastwors *	nail.com	Control 6 kalikelin Re-Erner 1	mai* ocklaces@gmail.c lassacro≭	om	
Yaur Engin Broat * Kalikelinecklaces@gm Patroats*	nail.com	Control E kalikalin Re-Emiri	est * ecklaces@gmail.c latescro*	om	
Year Legin Brust * Kalikelinecklaces@gn Passuers * Account Recovery Questio In what City does you	nait.com	Control E kalikelin Referent south	nai * ecklaces@gmail.c lassacrd *	om •	
Teur Legin Brust * Hall Auffmecklaces @gm Pastruces * Account Recovery Oversio In what city does you	nail.com	Contron E katikelin Referent stores	nai * ecklacez@gmail.c lassocro *	om O	
Your Legin Brail * Kalikelinecklaces@gm Passions * ****** Account Recovery Quesio In what city does you Account *	nat.com 	Control E Reference Reference g Isve?	ngi * ecklaces@gmail.c assuurd * nouar *	om O	
Tour Engin Brust * Kalikelinecklaces@gm Pattoors * Account Recovery Oversio In what city does you Annuar *	nal.com	Contine E Ratikelin Re-Error I Marcon State g Isve?	nat* ecklaces@gmail.c lastaord*	om e	
Your Legin Brust * Kalikelinecklaces@gm Passuors * Account Recovery Questio In what city does you Anouse *	nail.com	Control 6 kalikelin Re-Error 1 g Ive?	nai * ecklaces@gmail.c lassaord * maar *	•	

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\*
- $\circ$  Password\*
- Re-enter Password\*
- Account Recovery Question\*
- $\circ$  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									
The information entered on th	is page allows us to track general into	mation about your company to ensure we have the most up to date information in our system.							
Legal Company Name 🖈	Kali's Necklaces								
Doing Business As (DBA)	Kali's Necklaces								
Country of Origin * 😐	United States								
Legal Structure 🖈  😔	Individual/Sole Proprietor or !								
Tax ID Number Type 🔍	Social Security Number / Soci 🛛 🔻								
Tax ID Number *		• •							
Website	http://kalikellsnecklaces.com	@							
Additional Questions									
© Yes ⊕ No Are you registered with eVA, ti ⊕ Yes © No	Will the goods or services you provide require your staff to perform work on VCU premises? ★      ① Yes      No  Are you registered with eVA, the Commonwealth of Virginia's e Procurement System? ★      ④ Yes      ④ Yes      ⑥ No								
333333333									
If you are an existing VCU ven invoice date.	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 Yes	Are you interested in receiving information about electronic payments?           Yes         Y								
Are you interested in receiving Yes	; information on how to submit electro	inic Invoices?							
* Required to Complete Reg	istration	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.

🎢 Home	<b>OVCU</b>	R	<b>eal</b> Sour	ce						Kali Kellam 🔻	P .
Orders	Registration > Manage Regist	ration Profi	le > Business Details								
🚛. Catalogs and	<ol> <li>JAGGAER revised its <u>Service</u></li> </ol>	Privacy Po	olicy effective May 25, 2018. By	losing this banner, yo	u acknowledge	e that when you use o	ur Solution, we process yo	ur personal informatior	as described in our Service	e Privacy Policy.	×
Contracts	Kali's Necklaces		Business Details							2	
Payable	Registration In Progress for: Virginia Commonwealth Univer 2 of 6 Steps Complete	sity	The information on this page provide. Additionally, this dat Administration. The SBA stan	allows us to track imp a is used to determine dards are based on you	ortant details a whether or no ur NAICS code	bout your company, s t your business meets and annual revenue, o	uch as the areas where you the small business size star or number of employees.	operate and the produ ndards as defined by the	cts and services that you e U.S. Small Business		
Reporting	Welcome Company Overview	-	Year Established *								
Registration	Business Details	1	Number of Employees *			0					
	Addresses	1	Products and Services								
	Contacts	~	Commodity Codes *		-		Edit				
	Diversity	~									
	Tax Information	~	Additional Questions								
	Certify & Submit		Total Revenue/Receipts for th	e most recent 4 Quarte	ers ā						
	Registration FAQ   View History										
			★ Required to Complete Re	istration				< Previous	Next > Save Cha	inges	
Menu Search (Ait+M)									1	Need Help?	
<		_								Powered by JAGGAER   Pr	rivacy Policy

#### **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.								
Results Per Page 20 V	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	EOUIP. HEAVY CONSTRUCTION MACHINERY &							
	Done Close							

🎢 Home	<b>OVCU</b>	R	ealSour	се							Kali Kellam 🔻	₩ ♠
orders	Registration > Manage Registrat	ion Profil	<ul> <li>Business Details</li> </ul>									
ے Catalogs and	i JAGGAER revised its Service Pr	ivacy Po	l <u>icy</u> effective May 25, 2018. By o	closing this banner, yo	u acknowledge t	hat when you use our Solution, we pr	rocess your pe	ersonal information	as described in our Servi	ce Privacy I	Policy.	×
Contracts	Kali's Necklaces		Business Details							?		
Payable	Registration <b>In Progress</b> for: Virginia Commonwealth Universit <b>2 of 6</b> Steps Complete	v	The information on this page provide. Additionally, this dat Administration. The SBA stan	allows us to track imp ta is used to determine dards are based on you	ortant details abo whether or not y ur NAICS code ar	out your company, such as the areas w your business meets the small business d annual revenue, or number of emplo	vhere you ope is size standari loyees.	erate and the produc ds as defined by the	ts and services that you U.S. Small Business			
IL. Reporting	Welcome		Year Established *	2019								
Administer	Business Details	* *	Number of Employees *	3		θ						
• Acgistration	Addresses	1	Products and Services									
	Contacts Diversity		Commodity Codes *		101100 (SUP,	Edit ANIMAL, INCL PRODUCTS)		Remove				
	Tax Information	~			101700 (SUP,	FERTILIZERS, PLANT NUTRIENTS, HERE	BICIDES)	Remove				
	Certify & Submit		Additional Questions									
	Registration FAQ   View History		Total Revenue/Receipts for th	e most recent 4 Quarte	ers *							
			★ Required to Complete Re	gistration				< Previous	Next > Save Ch	nanges		
Menu Search (Alt+M)										S No	eed Help?	
<		_								_	Powered by JAGGAEF	R   Privacy Policy

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.

Add Address	×						
Basic Information (Step 1 of 3)	?						
What would you like to label this address? *							
Headquarters							
Example: Headquarters, Houston Office							
Which of the following business activities take place at this address? (select all that apply) *							
Takes Orders (fulfillment) Receives Payment (remittance)							
Other (physical)							
* Required to Complete Registration	Next >						
l'age	10 01 33						

• 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 ×								
Address Details (Step 2	Address Details (Step 2 of 3) ?							
How would you like to receive purchase orders for this fulfillment address?	Email		•					
Email Address	kalikelinecklaces@gm	ail.com						
Confirm Email	kalikelinecklaces@gm	ail.com						
Country *	United States		•					
Address Line 1 *	912 W Grace St							
Address Line 2								
Address Line 3								
City/Town *	Richmond							
State/Province *	Virginia		•					
Postal Code *	23284							
	Example: 12345 or 12345-	-6789						
Phone *	804 999 8658	ext.						
	International phone numb	bers must beg	in with +					
Toll Free Phone		ext.						
	International phone numb	bers must beg	in with +					
Fax								
	International phone numb	bers must beg	in with +					
* Required to Complete Registrat	ion	< 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

Kali's Necklaces		Contacts				?
Registration <b>In Progress</b> for: Virginia Commonwealth University <b>5 of 6</b> Steps Complete		Please enter contact in always contacting the o	formation for any individuals at your correct individual. Contacts can be lin	organization who may pro Iked to one existing addres	vide valuable information or help to our company s. Any required contact types are listed below.	/. This will help us ensure we are
Welcome		Contact Label	Contact Types	Name	Email	
Company Overview	1	Buy&Pay	Corporate (Primary)	Kells, Kelli	kalikellnecklaces@gmail.com	Edit
Business Details	1	Owner	Remittance (Primary) Fulfillment (Primary)	Kell, Kali	kalikellnecklaces@gmail.com	Edit 💌
Addresses	1	Vendor Team	Fulfillment	Smith, Ven	kalikellnecklaces+ven@gmail.com	Edit 💌
Contacts	1	Add Contact 🗢				Show Inactive Contacts
Diversity	1					
Tax Information	×.					
Certify & Submit						
Registration FAQ   View History						< Previous Next >

- 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.



- 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

	panner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Pri npanies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.	rivacy Policy.
Contracts     AGGAER revised its <u>Service Privacy Policy</u> effective May 25, 2018. By closing this bank     Contracts     Accounts     Poyable     Registration In Progress for     Registration In Progress for     Registration In Progress for	panner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Pri apanies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.	rivacy Policy.
Accounts Registration In Progress for: We strive to do business with diverse compare	npanies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.	?
Payable Registration In Progress for: We strive to do business with diverse compar	npanies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.	
Sourcing Virginia Commonwealth University		_
4 of 6 Steps Complete The system cannot determine whether this s Misicome	his supplier qualifies as a Small Business Enterprise (SBE) as defined by the U.S. Small Business Administration.	
Administer Company Overview	Additional Information	_
Business Details Small Business Enterprise (SBE)	Edit	-
Addresses Minority Owned Small Business (MOSB)	Delete	_
Contacts Woman-Owned Small Business (WOSB)	Delete	_ 1
State of Virginia Minority-Owned Business (V	Delete	
State of Virginia Small Business (VA-SB)	Delete	_
State of Virginia Women-Owned Business (V	Delete	
Certify of Submit Add Diversity Classifications Registration FAQ.   View History	< Previous Next	3

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	Do	ne 🥥				
	tax doc.pdf	10	00% ×				
	L Download Pre-populated Tax Docum	ent					
	I certify this tax document						
Electronic System Submissi	on						
Under penalties of perjury, I o	certify that:						
<ul> <li>I am the same person (or payee's agent) accessing the system and submitting this form as identified on this form.</li> <li>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.</li> </ul>							
eSignature	Enter Portal Password						
* Required to Complete Registr	ation Save C	hanges	Close	]			

- Select Save Changes
- Select Proceed to Certify and Submit

## 8. Certify & Submit

Kali's Necklaces	Certify & Submit	?				
Registration In Progress for: Virginia Commonwealth University	I certify that I have read and agree to the following:					
6 of 6 Steps Complete	<ul> <li>Registering as a VCU vendor does not guarantee award of a VCU purchase order or purchase contract.</li> </ul>					
Welcome	<ul> <li>All information and data in VCU's vendor portal is subject to the Virginia Freedom of Information Act (FOIA), found at § 2.2-370 and following of the Code of Virginia.</li> </ul>	0				
Company Overview 🗹	The registration information provided is true and I am authorized to make this certification on behalf of the vendor.					
Business Details 🗸	<ul> <li>The vendor is responsible for the security of their portal account, including restricting access to it, maintaining the confidentiality login information, and taking any other actions necessary to protect the security of the vendor's account. VCLI will not be</li> </ul>	y of				
Addresses 🗸	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.					
Contacts 🗸						
Diversity 🗸	Preparer's Name * Kali Kellam					
Tax Information 🗸	Preparer's Title *					
Certify & Submit	Cwner					
	Preparer's Email Address * kalikelInecklaces@gmail.com					
	Today's Date 4/3/2019					
Registration FAQ   View History	Certification * 🕢 I certify that all information provided is true and accurate.					
	★ Required to Complete Registration Subm	it				

- 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 <u>RealSource Website</u>, and select the Vendors Only tab.

$\leftrightarrow$ $\rightarrow$ G $\cdot$	realsource.vcu.edu/vendors-onl	y/ ☆ © <b>≱</b>	K :
F	AQs	Vendors Only Information	
N	lews & Events	Vendor Guidelines for Work on Campus in Response to COVID-19	
C	Departments Only	Congratulations and Welcome to RealSource!	
v	/endors Only	If you are accessing this webpage, you are likely one of the very "first" VCU vendors invited to register i	
F	Procurement Staff Only	track your VCU transaction details, create invoices and much more. It is paperless, efficient, available 24/7 and will save your firm both time and money.	
c	Contact Us	While RealSource will not be fully accessible to VCU departments until May 13th, it is <u>important for your firm to register as</u> soon as possible, so that departments can issue new POs or change existing POs and promptly approve your invoices	
s	Search Q	Firms and individuals who register in the RealSource Vendor Portal, will receive additional information from VCU about the portal on how to submit electronic invoices and navigate within the tool. Although registration in the RealSource tool is simple and should take no more than 15 minutes to complete, a comprehensive registration guide, FAQs and other information is provided below. Also, the "Contact Us" tab at the top of the RealSource website includes a webform for questions and comments along with contact information.	
		We would love to hear from you, whether you need answers or wish to provide general feedback! Thank you for registering in RealSource!	
		To access the RealSource Vendor Portal, select the login icon above.	
		Expand All	_

• 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 VC transactions. Once you've registered, you can manage your VCU account, creat electronic invoices, view POs and send questions to VCU's purchasing and pay	U te and submit ments staff.					
The RealSource Supplier Portal runs securely on a JAGGAER platform. Registrat 15 minutes to complete. After you've registered, you can return to this webpag your RealSource account 24/7.	ion takes only ge to access					
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 <del>-</del>					
Email	Next					

- 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.

~			<b>■</b> ▲ 1
	Home > Customer Portal Home		
6			
•	Welcome to VCU's	Quick Links to Common Tasks	7
-	Vendor Management Portal	Manage Registration Profile	
- €	We take great pride in our relationships with vendors.		
ы	RealSource Project Website	Sourcing Events	2
ш	https://realsource.vcu.edu/	Show Opening or Closing Soon	Co to Public Opportunities
<b>a</b> ?	Office of Procurement Services Website https://procurement.vcu.edu/	No Results	
8		No Results	
*	Customer Contact ?		View All Events
	Email realsource@vcu.edu Phone +1 804-828-0889	Contracts	2
		Customer	In Effect All
		Virginia Commonwealth University	1 17
			View All Contracts
		Create Invoice / Credit Memo	?
		Type   Type  Credit Memo	•
		Invoice No.	
		Invoice Date	
		mm/dd/yyyy	
4		Create From   PO or Non-PO  Conti	ract Need Help?

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

# D. <u>CONTRACTS</u>

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.

~	€ VESU						
	Home  Customer Portal Home						
Ĩ.							
<b>Q</b>	Catalogs and Contracts						
29.	Contracts , Search Contracts						
v	We take great pride in our relationships with vendors.						
	Quick Links to VCU Information:						
Шь	Anti-Discrimination						

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.

â	⊛γ <del>c</del> u								F 4 1	
	Catalogs and Contracts + Contracts + Search Co	ontracts								
Í0	Search Documents								Q Got Feedback?	
0	Quick search	Quick search Q Add Filter * Clear All Filters								
3	<ul> <li>Page 1 of 7 1-6 of 3</li> </ul>	37 Results							🔅 6 Per Page 👻	
հր	Customer Name	Second Party	Contract Number	Contract Name 🔹	Status 💌	Version Type	Version Numbers	Start Date 💌	End Date 🔻	
ഷ	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	
	<ul> <li>Page 1 of 7 1-6 of 3</li> </ul>	37 Results							6 Per Page 🔻	

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

1	<mark>⊛}£</mark> µ			
	Catalogs and Contracts  Contracts  Search	Contracts		
Ĩ0	< Back to Results	3 of 37 Results 🗸 🔪		
e	Executed: Future This contract will	be in effect on the start date	of 2/21/2021 at 12:00 AM EST.	Actions 🔻
₿	<b>C0000271</b> AD<10	Header		0
ш	Dates: 2/21/2021 - 2/20/2022 Version: Renewal 1, Amendment 0	Contract Number *	C0000271	
<u>ค</u> ว-	Header	Contract Name *	AD<10	
	Attachments (2)	Summary	Financial services	
\$	Communication Center 1	Start Date *	2/21/2021 12:00 AM EST X 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

<	<b>WCU Real</b> Source				
6	Orders Type to Search Sales Orders C	x			
S.	Sales Orders And Shipments Search for Sales Orders Sales Invoices	Q			
~	we take great pride in our relationships with vehdors.				
յու	RealSource Project Website https://realsource.vcu.edu/				

- 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.

<b>VCU Real</b> Source									<b>⊨ + T</b>	
Orders  Sales Orders And Shipments  Search 1 Search Sales Orders	E Search Sales Orders									
Quick Filters	Created Date: Last 90 da	<b>ys</b> ▼ Quick se	earch	Q 3 Add	Filter  Clear All Filters					
Commodity Code 🗸 ^	1-4 of 4 Results								🔅 6 Per Page 🔻	
No Commodity Code	Sales Order Number 🔻	PO Number	Created Date/Time 오	Supplier	Fulfillment Center	Owner	Shipment Status	Fulfillment Status	Total Amount 🔻	
Network Fulfiliment Center	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	
Fulfillment Status	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	
Does Not Apply 4 Invoice Status 🗸	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	
No Invoices 3 Partially Invoiced 1 Show More	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 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.

<b>VCU</b> Real	Source				
"Invoice Received Date Due Date Invoice Dumer "Vender Invoice No. Ramit To	6/12/20 6/17/20 mmod/drywy Enc Glover ET Ramit to Address 1 v 83.5 W Cary 38 Rothanana, W 23/20-5403 United States				
Lines					
P0045009					
Product Description		Catalog No	Unit Price Quantity	Ext. Price	
test			25.00 4 USD EA 100.00 15 USD EA	100.00 USD 1.500.00 USD	Delete Delete
Discount, tax, shipping & handling					
Discount	0.00 USD				
Sales Tax	0.00 USD				
Local lax	0.00 USD				
Handling	0.00 USD				
Verification expred. Check the checkbox again. I'm not a robot Margi-tem					

• Once you have completed the work specified on your PO, complete and submit the form.





### 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.

des → Sales Orders And Shipments → Search for Sales Orders → Summary - 50 1908919 Sack to Results 1 of 4 Results Sales Order Number 1908919 Revision 0 External PO Ref #: P0057921 B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to 1	+ ▲ History ∨ Go
ders + Sales Orders And Shipments + Search for Sales Orders + Summary - 50 1908919       Sack to Results     1 of 4 Results -        Sales Order Number     1908919 Revision 0       External PO Ref #:     P0057921       Supplier Name     B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to 1	listory ∨ <mark>Go</mark>
Back to Results 1 of 4 Results  → Sales Order Number 1908919 Revision 0 External PO Ref #: P0057921 B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to I	History ~ Go
Sales         Order Number         1908919 Revision 0           External PO Ref #:         P0057921           Supplier Name         B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to I	 History ∨ <mark>Go</mark>
ixternal PO Ref #: P0057921 Bupplier Name B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to I	listory ∼ <mark>Go</mark>
Supplier Name B&G Financial Consulting	nents Advance Ship Notices Hist	tory		Available Actions Add Notes to I	History ~ Go
	nents Advance Ship Notices Hist	tory			
sture Fales Order Devisions DO Deventer Investore Order Ashan deday	nents Advance ship Notices His	tory			
atus Sales Order Revisions PO Documents Invoices Order Acknowledge					2
Summary Shipping Information Supplier Information					1
de header	Chinada		D:	Hide	a value descriptions
General Information :	Shippir	ng information	DI	ling information	
riority Normal	Ship Io		Bill Io		
ales Order No. 1908919	1001 West Franklin Street		Box 980327		
ales Order Create Date 8/24/2020	Floor 5		Richmond, VA 23298-0327		
U/Reference No. P005/921	Richmond, VA 23284		United States		
O Creation Date 8/24/2020	United States				
uyer Name Kortne Gilbert			Bill To Address Code	VCUAP	
uyer Phone	ShipTo Address Code	162			
uyer Email kgilbert3@vcu.edu			Billing Options		
upplier Name B&G Financial Consulting	Delivery Options		Accounting Date	no value	
	Ship Via	Best Carrier-Best Way	Payment Terms	7% 10, Net 10	
	Expedite	×	F.O.B	no value	
	Requested Delivery Date	no value			
		View/edit by line item			
				t Mandalater	
Distribution Information		?	Supplier Informatio	on Need Help?	

# Cont. (Same Screen)

<b>WCU Real</b> Source							<b>*</b>	<b>Å 1</b>
Orders + Sales Orders And Shipments + Search for Sa	les Orders 🕨 Summary - SO 1908919							
Di	istribution Information	?		Supplier	nformation			?
Workflow			Contract	no	value			
Fulfillment Status	Does Not Apply		Account Code	no	value			
Order Acceptance Instructions	No order acceptance instruction	5	Pricing Code	no	value			
Supplier Terms and Conditions	no value		Quote Number	no	value			
			Note to Supplier	no	note			
			Attachments For Supplier					
						Size	Date	
			PO Clauses					
			no clause					
							View/edit	t by line item
Line Item Details								?
Hide line details								
Product Description			Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 √ Test 3 🍺				EA	67.00	2 EA	134.00 USD	
		laxable	<b>^</b>	External Note		no note		
		Commodity Code	novalue	Attachments to	or supplier			
				PO Clauses				
				no clause				
Shipping, Handling, and Tax charges are calcu	ilated and charged by each supplier. Th	e values shown here are for estima	ation purposes, budget checking	g, and workflow approvals.	Subtotal		134.00	
					Shipping	S. N		
1					Handling		ood Holp.	

• 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 <u>Invoice Table 1</u>.

Туре	Invoice O Credit Memo	
Invoice No.	9171210	
Invoice Date	09/17/2020 🗰 mm/dd/yyyy	
Create From	PO or Non-PO O Contract	
	Optional PO Number	
Currency	US Dollar 🗸	

- 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.

<b>WCU Real</b> Source				in Ť	1
Orders + Sales Invoices + Search for	Sales Invoices + Draft Sales Invoice 9171210				
Invoice No. Customer Invoice Date PO Number Sales Order Number Supplier Invoice Image	9171210 Virginia Commonwealth University 9/17/2020 P0057921 1908919 add attachment.			Save Send To Custor	mer
Invoice Messages Attachment	s History				_
Hide header				Hide value descrip	f ptions
Gene	ral Information ?	Billing	Information ?	Customer Invoice Information	?
Invoice Info Create Date Invoice Date Invoice Date Supplier Customer RMA No. Supplier Account No.	9/17/2020 9171210 9/17/2020 mm/dd/yyyy Barbara Gregg B&G Financial Consulting Virginia Commonwealth University	Billing Address Accounts Payable Box 980327 Richmond, VA 23298-0327 United States Remit To Address Remit To Address Remit To Location List	Home Office v Eric Glover 2625 Broad Street Richmond, VA 23223	Customer does not share invoice information.	
<b>Order Info</b> Sales Order Number PO Number	1908919 P0057921		United States Email bmyles964@gmail.com Phone 1-804-8281163-	Seed 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
Due Date Payment Terms Discount Date Estimated Discount Amount	9/27/2020 % V 27 Discount Days Net 9/27/2020 9.38 USD	A 2	Attachments Attachments Size Date P0005251-1016.pdf 57.0 KB 9/17/2020 Remove Add Attachment Customer Uploaded Attachments
Notes	Shipping Info	?	Tax, Shipping & Handling
F.O.B.	.:: 1000 characters remaining expand   clear	:	Image: Non-Image: Non
Shipping Address ATTN: Kortne Gilbert 1001 West Franklin Street Floor 5 Richmond, VA 23284 United States			

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

Line Item Deta	Line Item Details ?														
Add Line Items	Add Lines fro	om Contract											Actions	for Selected Ite	ems 🔻
Invoice Line	PO No.	Contract No.	Order Line	Part No.	Description	Product Size	Quantity		Unit Price	Packaging	Extended Price	Tax, Shipping & Han	dling		
1	P0057921		1		Test 3		2.00	+	67.00	EA	134.00	show		Actions 🗢	
	Notes														
						.4									
			1000 characters	remaining	expand   c	lear									
												S	ubtotal	134.0	0
												Ti D	ax 1	0.0	o I
												т	ax 2	0.0	0
												S	hipping	0.0	0
												H	landling	0.0	0
												т	OTAL	134.0	0 USD
															-
													Save	Send To Cu	ustomer

- 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.
  - <u>Note</u>: Do NOT enter a Quantity or Unit Price that is greater than the Sales Order amount. This will cause an error. Instead, contact the <u>RealSource</u> <u>HelpDesk</u> 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.

Invoice Sent To Buyer		?
Invoice Number 9171210	has been submitted.	
Invoice Number	9171210 🖨	
Invoice Date	9/17/2020	
Invoice Total Amount	67.00 USD	
Number of line items	1	
	Search Sales Orders	

### 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.

Â	WCU RealSource	ie In Salas Innia												<b>► ↓ 1</b>
ío	≡ Search Sales I	nvoices												
Ö	Quick Filters		Created Date: Last 90 day	vs 🕶 Quick search			<b>Q</b> Add	Filter 🔹 Clear All Fil	ters					
&	Created By	~	Sales Invoice/Credit Memo No. 🔻	Customer	Created By	Sales Order Number	PO Number	Invoice Date 🗢	Submitted Date 🗢	Pay Status	Payment Date	Payment Method	Туре	Total Amount 🔻
հղ	Gregg, Barbara	0	9171210	Virginia Commonwealth	Barbara Gregg	1908919	P0057921	9/17/2020	9/17/2020 12:32:13 PM	Payable	-	Unknown	Invoi ce	62.31 USD
ā,	PO Credit Memo	O		University	35									
-	Pay Status	~											_	

### 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 <u>RealSource HelpDesk</u>.

Invoice Number: 11783934 created for PO Number: PO	045009 lindox x			9 2
VCU RealSource UIT <uit_realsource@solquest.com> to me +</uit_realsource@solquest.com>		10:16 AM (1 minute ago)	÷ +	. :
	VCU RealSource			
	Do NOT reply to this mail.			_
	Invoice Number: 11783934 has been created for PO Number: P0045009 for the amount of 1,600.00 USD			
1	Thank You,			_
	VCU			_
				_
the Roply the Forward				_

- 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 <u>RealSource HelpDesk</u>.

# G. WHERE TO GET HELP?

Email: <u>RealSource@vcu.edu</u>

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.

Need Assista	ance?		?
Help			
Search for		Q	
Browse the Table	of Contents		
Training			
Online Training a	nd Support		
Supplier Con	tact		
Name:	Barbara Gregg		
Title: Email: Phone:			
JAGGAER Sup Still have quest	oport ions? Contact Us 🗹		

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.