Submit an Invoice via the Supplier Portal

The supplier portal provides a more direct way to invoice Indiana University for goods or services you provided. Invoicing via the supplier portal, also known as a "PO Flip," results in faster processing.
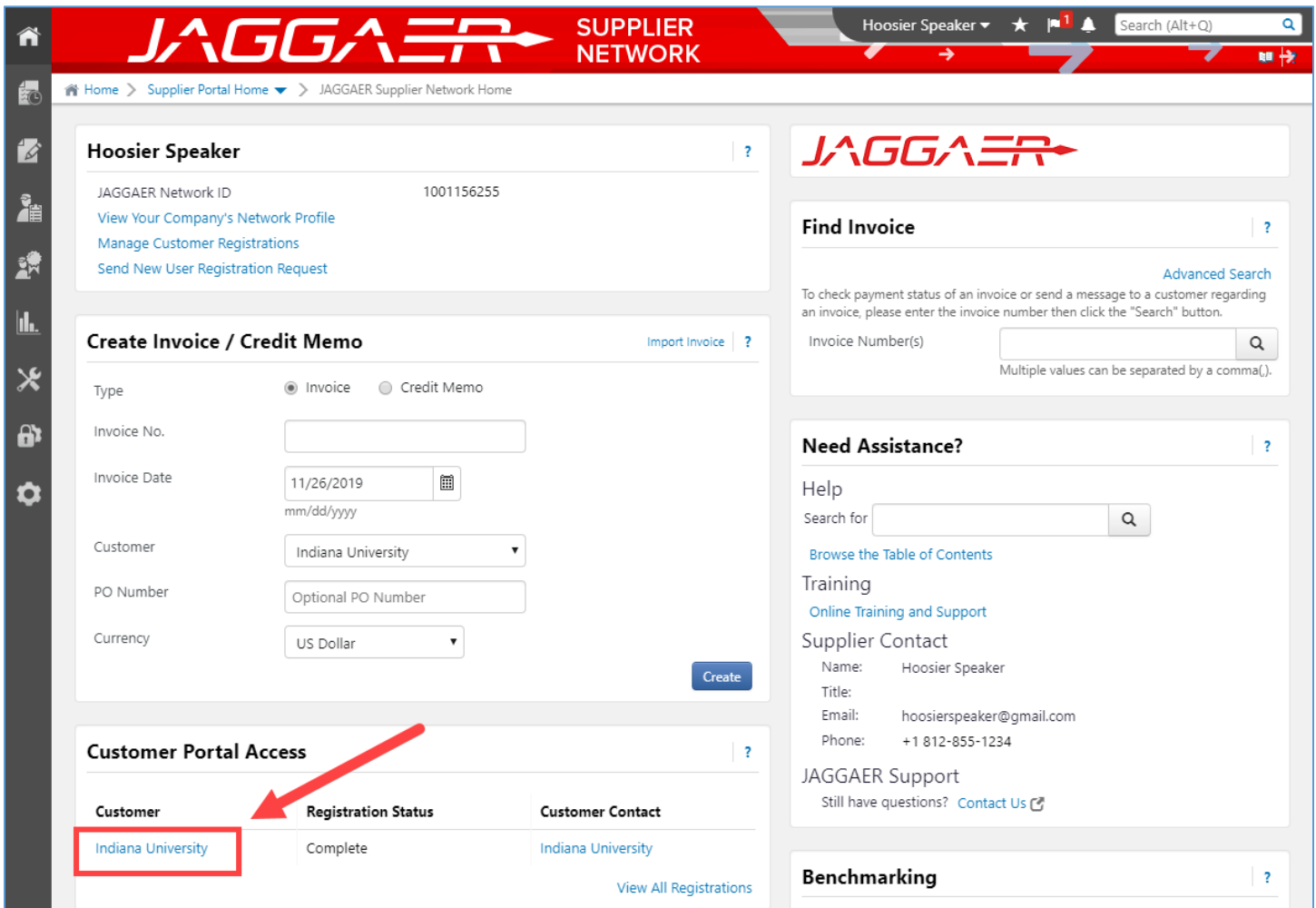
This invoice submission method is optional, but IU's preferred method. You may also submit invoices to our partner, TrustFlow, for processing via email to invoice@iu.edu. Additional invoice submissions details are available on our Accounts Payable page.

> The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets.
>
> It must be accessed from a desktop computer.

Before you follow the steps in this document, locate the following items:

- Jaggaer portal username and password.
- IU purchase order (PO) number. Click here for instructions on locating PO numbers in the portal.
- *Optional, but encouraged: scanned image of prepared invoice document.*

First, log in to your Jaggaer supplier portal. Once logged in, navigate to your Indiana University portal by clicking **Indiana University** in the **Customer Portal Access** section.

First, locate the order you wish to invoice. Navigate to **Search for Sales Orders**, located within the **Orders** module in the left-hand menu.
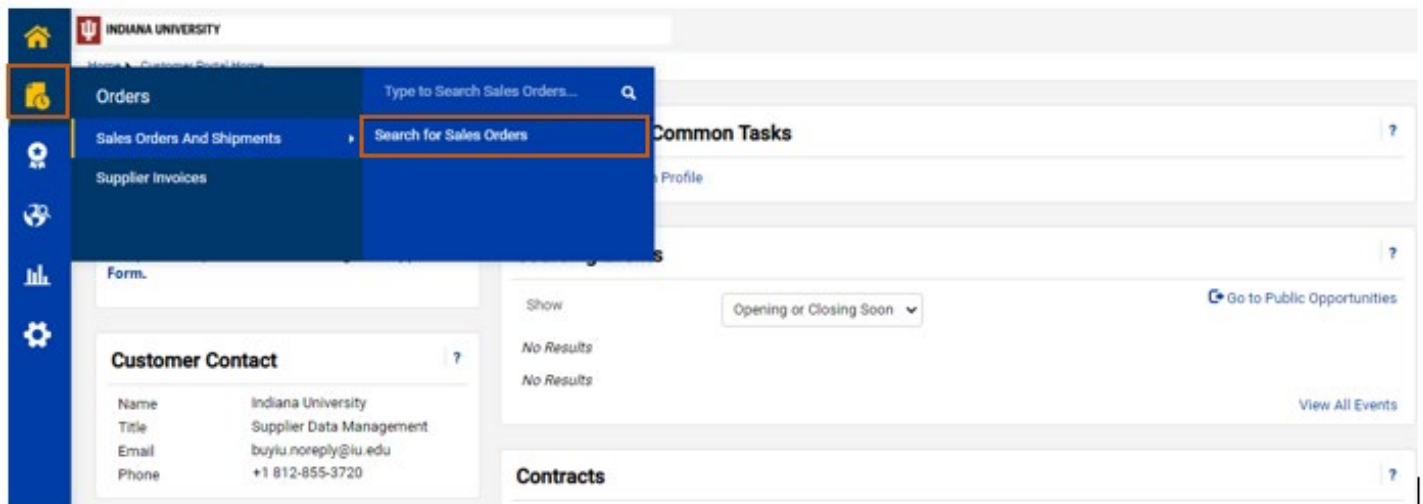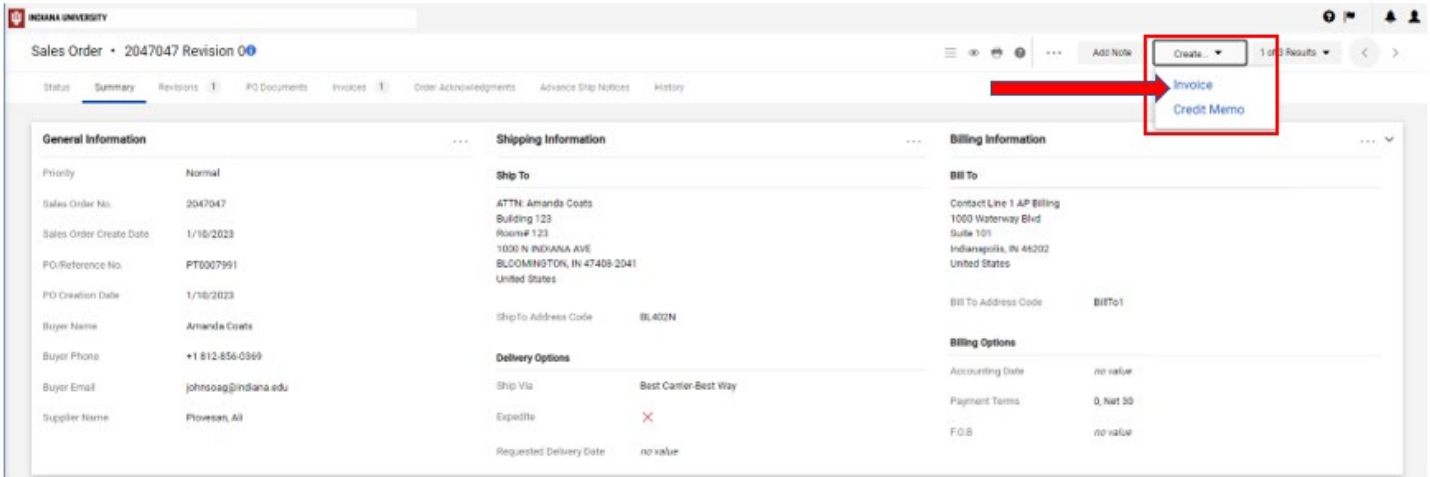

Jaggaer returns a list of POs you have received from IU. Use the **search field** at the top of the page to search for your PO number, or locate it in the list.

Jaggaer will automatically show POs created in the last 90 days.

Click the **Sales Order Number** to view the PO details and start the invoicing process.
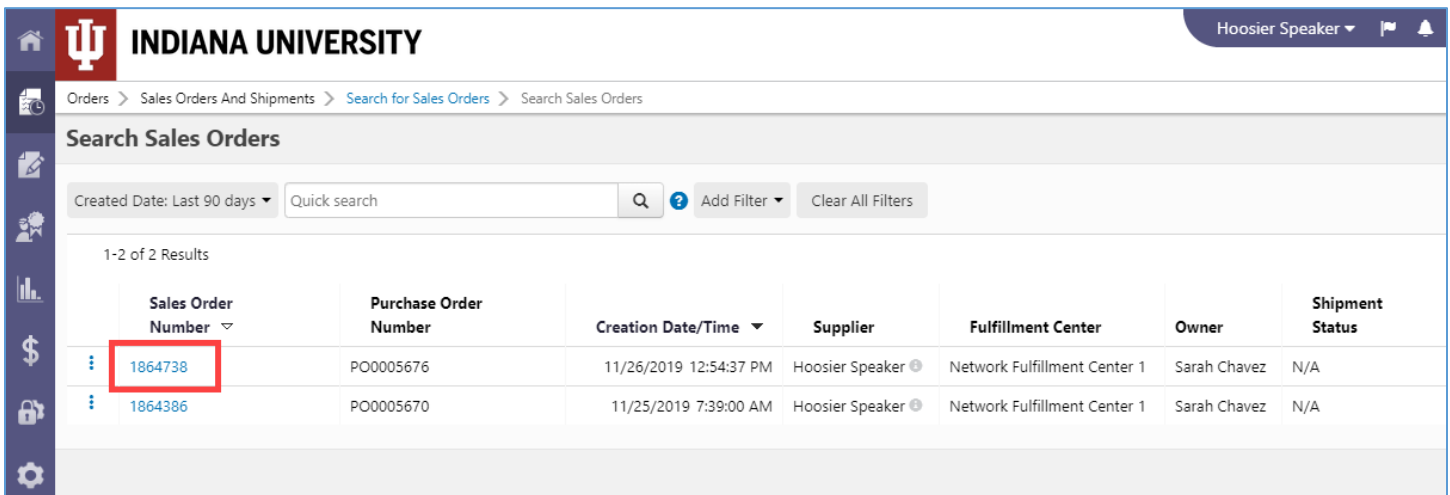
Select **Invoice** from the **Create…** drop-down menu.

We strongly encourage you to add an attachment to your invoice. An attachment could consist of a scanned image of a prepared invoice, invoice itemization, or other documentation. This helps IU staff during their review process.

Do not upload documents which contain critical information such as social security numbers or passport information.

Navigate to the **Entry** tab then click **Add Invoice Image** to upload an attachment.
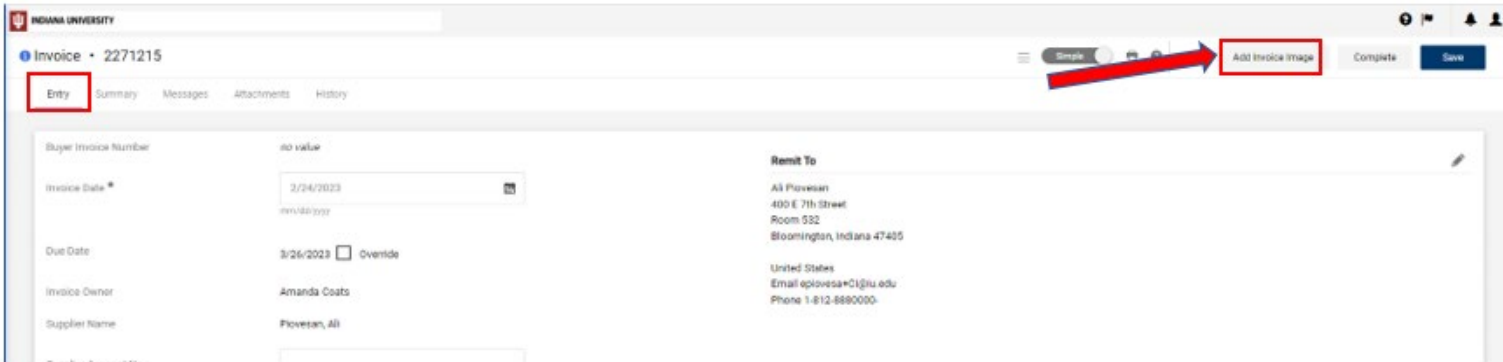
Add your file and click **Save Changes.**

Add Invoice Image ✕

File(s) ★

Drop File or Browse
Max. File Size: 19.77 MB

★ Required fields   **Save Changes**   Close

Enter your invoice number in the **Invoice No.** field and adjust the **Invoice Date**, if needed.

Click **Save** in the upper right-hand corner to save your progress.

If you are invoicing a subaward or grant account, enter the award, subaward, or grant number in the **Supplier Account No.** field.

ⓘ Invoice • 2271537

Entry   Summary   Messages   Attachments   History

Buyer Invoice Number	*no value*
Invoice Date ★	2/25/2023 📅
	mm/dd/yyyy
Due Date	3/27/2023 ☐ Override
Invoice Owner	Amanda Coats
Supplier Name	Piovesan, Ali
Supplier Account No.	
Invoice Number ★	
	⊗ Required

Changes made in the Billing Information section do not impact where payment is sent.

If a discount applies to the invoice, enter that information in the **Payment Terms** section. In the example below, a 5% discount will be applied to the invoice if it is paid within 10 days. Full payment is due within 30 days.

A discount may be added in the **Discount** field in the **Tax, Shipping & Handling** section. To open this section, click the **Discount, Tax, Shipping & Handling** box

Enter any applicable taxes or shipping and handling fees in the appropriate fields. These fields are optional and may not apply to your invoice.

Finally, review the **Line Item Details** section. Here, enter what the goods or services to be billed.

By default, all lines will be fully invoiced. If your invoice represents a partial shipment or partial bill, be sure to update the **Quantity** or **Unit Price** fields as appropriate.

In this example, we will invoice IU for 5 items on line one. The extended, or invoice, price adjusts based on the changes you make.

If you are submitting a partial invoice, remove the unused lines by clicking on the **Trashcan** icon next to the line.

This action cannot be undone so be sure you've selected the correct lines!

Review your invoice one final time, then click **Complete**, available at the top of the page, to submit the invoice for review.

You are not able to edit an invoice once it is submitted. Be sure to double check your work!

Jaggaer displays a confirmation screen upon submission and quick links to submit another invoice or credit memo.

Invoice Submitted

Summary

Invoice number	IT0009103
Invoice Status	Pending
Supplier Invoice No.	5465
Invoice name	2023-02-25 epiovesa+CI@iu.edu 03
Invoice date	2/25/2023
Invoice total	5,000.00 USD
Number of line items	1

Create Invoice / Credit Memo

Type	⦿ Invoice ◯ Credit Memo
Invoice No.	
Invoice Date	2/25/2023 📅 mm/dd/yyyy
PO Number	Optional PO Number
Currency	US Dollar ⌄

Create