

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 <u>invoice@iu.edu</u>. Additional invoice submissions details are available on our <u>Accounts Payable page</u>.

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. <u>Click here for instructions on locating PO numbers in the portal</u>.
- 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.

ñ	/^[3 <i>G^=</i> 5		Hoosier Speaker ▼ ★ = ¹ ▲	Search (Alt+Q) Q
	Home > Supplier Portal Ho	ome 🔻 > JAGGAER Supplier Network Hor	ne		
	Hoosier Speaker		?	J∧GG∧ ΞΠ •	
Ĩ	JAGGAER Network ID View Your Company's N Manage Customer Regis			Find Invoice	?
يُ الل	Send New User Registra			To check payment status of an invoice or send a me an invoice, please enter the invoice number then cli	
	Create Invoice / C	Credit Memo	Import Invoice ?	Invoice Number(s)	Q an be separated by a comma(,).
⊁	Туре	Invoice O Credit Memo		Multiple Values c	an be separated by a comma(,,).
C);	Invoice No.			Need Assistance?	2
۵	Invoice Date	11/26/2019 III		Help Search for	Q
	Customer	Indiana University	T	Browse the Table of Contents	
	PO Number	Optional PO Number		Training Online Training and Support	
	Currency	US Dollar 🔻	Create	Supplier Contact Name: Hoosier Speaker Title: Email: hoosierspeaker@gmail.com	
	Customer Portal	Access	?	Phone: +1 812-855-1234 JAGGAER Support	
	Customer	Registration Status	Customer Contact	Still have questions? Contact Us 🕑	
	Indiana University	Complete	Indiana University		
			View All Registrations	Benchmarking	?



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

0	Orders		Type to S	iearch S	iales Orders Q		
e e	Sales Orders And	d Shipments 🔹 🔸	Search for	Sales	Vrders	Common Tasks	1
	Supplier Invoices					• Profile	
B							
հ	Form.					5	1
					Show	Opening or Closing Soon 🐱	C Go to Public Opportunitie
₽	Customer	Contact		?	No Results No Results		
	Name	Indiana Universit	-		no neeve		View All Event
	Title Email	Supplier Data Ma buylu.noreply@in					
	Phone	+1 812-855-372			Contracts		

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.

ñ	ψ								
	Orders								
-	Sear	ch Sales Orders							
1	_	ed Date: Last 90 days ▼	Quick search	Q 3 Add Filter •	Clear All Filters				
<u>.</u>		Sales Order Number ⊽	Purchase Order Number	Creation Date/Time 🔻	Supplier	Fulfillment Center	Owner	Shipment Status	
\$	÷	1864738	PO0005676	11/26/2019 12:54:37 PM	Hoosier Speaker 🖲	Network Fulfillment Center 1	Sarah Chavez	N/A	
C t	+	1864386	PO0005670	11/25/2019 7:39:00 AM	Hoosier Speaker 🕲	Network Fulfillment Center 1	Sarah Chavez	N/A	
٥									



Select Invoice from the Create... drop-down menu.

KANA UNIVERSITY								0 1*		٠
ales Order • 204704	47 Revision 00				≡ ∞ ⊕ 0 …	Add Note Create	• 1 of 3 Re	uits 🕶	<)
Status Summary R	evisions I PO Documents involo	s 1 Order Acknowled	dyments Advance Dillo Notice	e History	_	Invoice				
General Information		200	Shipping Information		Billing Information					•
Priority	Normal		Ship To		Bill To					
Sales Order No.	2047047		ATTN: Amanda Coats Building 123		Contact Line 1 AP Billing 1000 Waterway Blvd					
Sales Order Create Date	1/16/2028		Room# 123 1000 N INDIANA AVE		Suite 101 Indianapolis, IN 46202					
PO/Reference No.	PT0007991		BLOOMINGTON, IN 47408-20 United States	41	United States					
PO Creation Date	1/16/2023		ShipTo Address Code	BL402N	BIII To Address Code	BIETO1				
Buyer Name	Amanda Coats		Subto vender Cape	BPartu	Billing Options					
Buyer Phone	+1 812-856-0369		Delivery Options		Accounting Cade	no value				
Buyer Email	johnsoag@indiana.edu		Ship Via	Best Carrier-Best Way	Payment Terms	0, Net 50				
Supplier Name	Plovesan, All		Expedite	×	FOB	no value				
			Requested Delivery Date	no value						

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.

INDIANA UNIVERSITY				0 M 4 1
Invoice • 2271215 Entry Summary Messages	Attachments History		E Brok	Add theoice image Complete Saw
Buyer Invoice Number	no value		Remit To	/
Invoice Date *	3/24/2023 www.48/bypr	-	Al Provean 400 E 7th Street Room 532	
Oue Date	3/26/2023 🔲 Override		Bloomington, Indiana 47405 United States	
invoice Owner	Amanda Coats		Email optovesa+Ciĝiu odu Phone 1.812-889000-	
Supplier Name	Plovetan, Ali			
Coreliar Account Kin				

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	Invoice • 2271537								
Entry Summary Messages Attack	hments History								
Buyer Invoice Number	no value								
Invoice Date *	2/25/2023								
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.

Orders > Sales Invoices >	Search for Sales Invoices 👻 > Draft	Sales Invoice Unassigned	
Customer Invoice Date PO Number Sales Order Number Supplier Attachments	Indiana University 11/26/2019 P00005676 1864738 Invoice IU112619 remove add attachment		Save Send To Custom
Hide header			Hide value descripti
Gen	eral Information	? Billing Information	? Customer Invoice Information
Invoice Info Create Date Invoice No.	11/26/2019 IU112619 11/26/2019	Billing Address Contact Line 1A PP Billing 1000 Wateway Blvd Suite 101 Indianappart 202	Customer invoice information unavailable.
Invoice Date Invoiced By	mm/dd/yyyy Hoosier Speaker	United State	
		Remit To Address Remit To Address Remit To Location List Address V eaker St	

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

NDIANA UNIVERSITY	
Invoice • 2271661	
Entry Summary Messages Attachme	ents History
Buyer Invoice Number	no value
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 *	
	O Required
Currency	US Dollar
Sales Order Number	2047047
Customer	Indiana University TEST SITE
Paid Date	no value
Payment Cancel Date	no value
Discount, Tax, Shipping & Handling	

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



Discount, Tax, Shipping & Handling

Allocation	Weighted	~		
			Неа	der-level
Terms Discount			c	0.00 USD
Discount		\longrightarrow	0.00	
Sales Tax		\rightarrow	0.00	
VAT		\longrightarrow	0.00	
Shipping			0.00	
Handling			0.00	

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.

1 Line						
PT0007991						
Status PO Line Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 🗸 1 Widget 1		EA	100.00	5	500.00	ii.



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

1 Line						
PT0007991						
Status PO Line Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	_
1 🖌 1 Widget 1		EA	100.00	5	500.00	1

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.

				-	0	≈
	\equiv	Simple 🔵	8	 Add Invoice Image	Complete	Save
>						<i></i>

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		Create Invoice / Credit Memo						
Invoice number	IT0009103	Туре	Invoice O Credit Memo					
Invoice Status	Pending							
Supplier Invoice No.	5465	Invoice No.						
Invoice name	2023-02-25 epiovesa+Cl@iu.edu 03	Invoice Date	2/25/2023					
Invoice date	2/25/2023		mm/dd/yyyy					
Invoice total	5,000.00 USD	P0 Number	Optional PO Number					
Number of line items	1							
		Currency	US Dollar 🗸					
		Create						