

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.

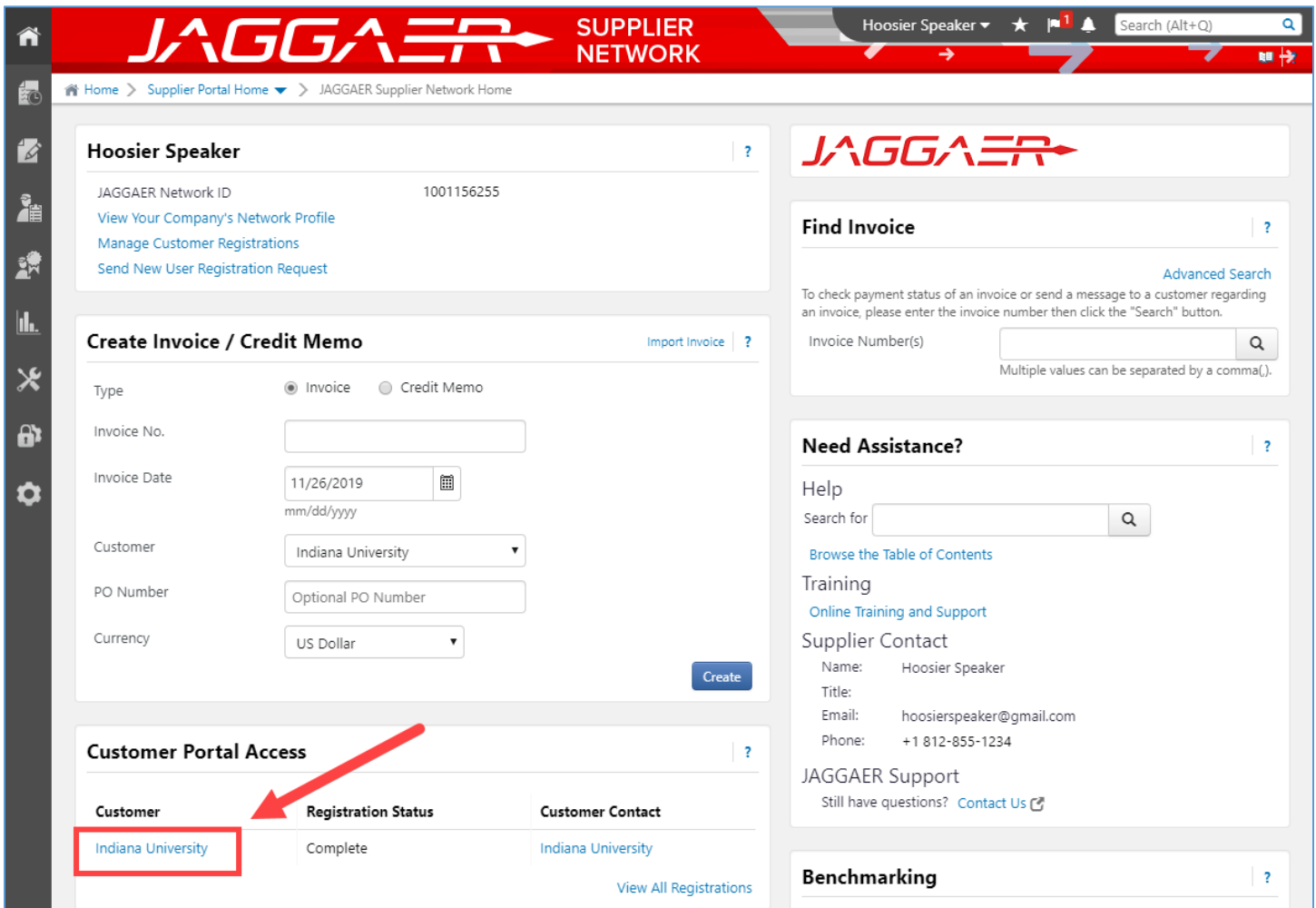
This invoice submission method is optional, but IU’s preferred method. You may also submit invoices to our partner, TrustFlow, for processing via email to invoice@iu.edu. Additional invoice submissions details are available on our [Accounts Payable page](#).

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:

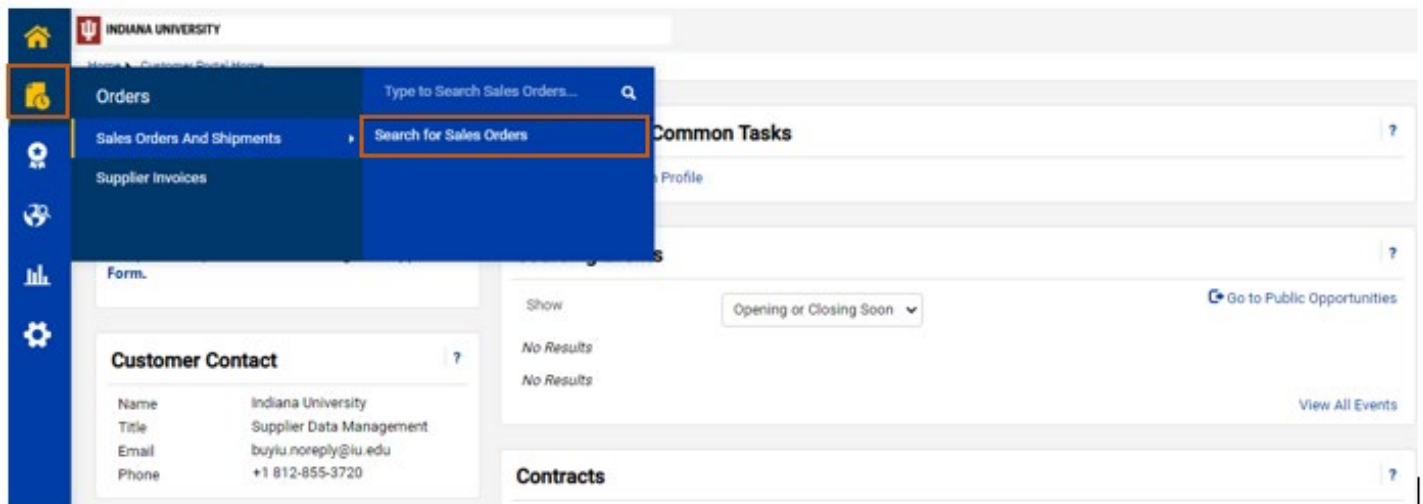
- Jaggaer portal username and password.
- IU purchase order (PO) number. [Click here for instructions on locating PO numbers in the portal.](#)
- *Optional, but encouraged: scanned image of prepared invoice document.*

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.



Customer	Registration Status	Customer Contact
Indiana University	Complete	Indiana University

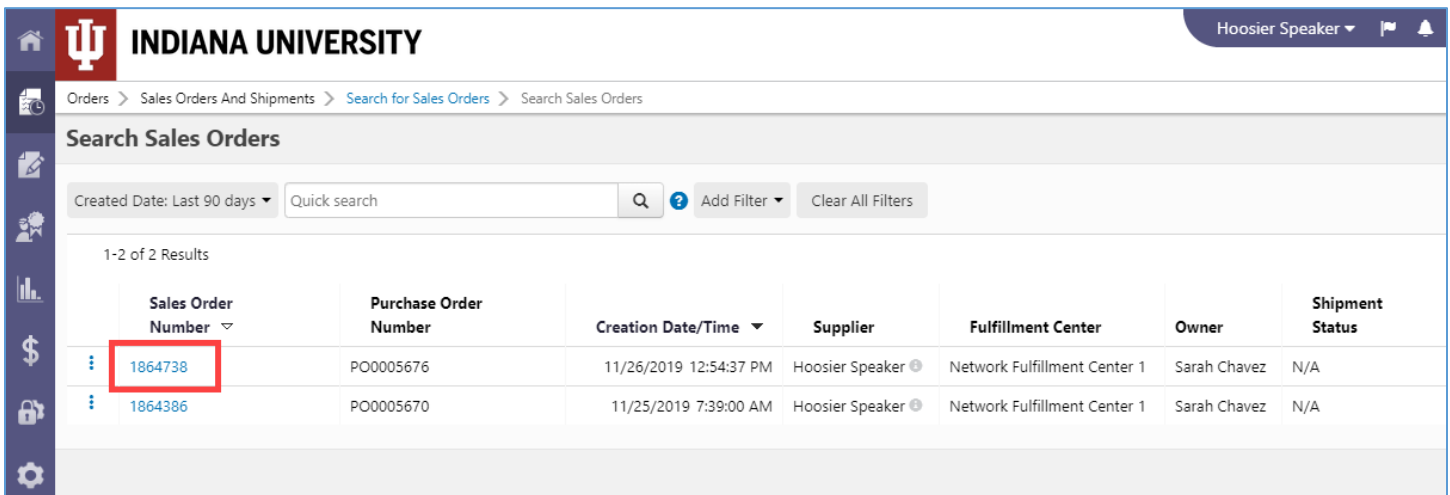
First, locate the order you wish to invoice. Navigate to **Search for Sales Orders**, located within the **Orders** module in the left-hand menu.



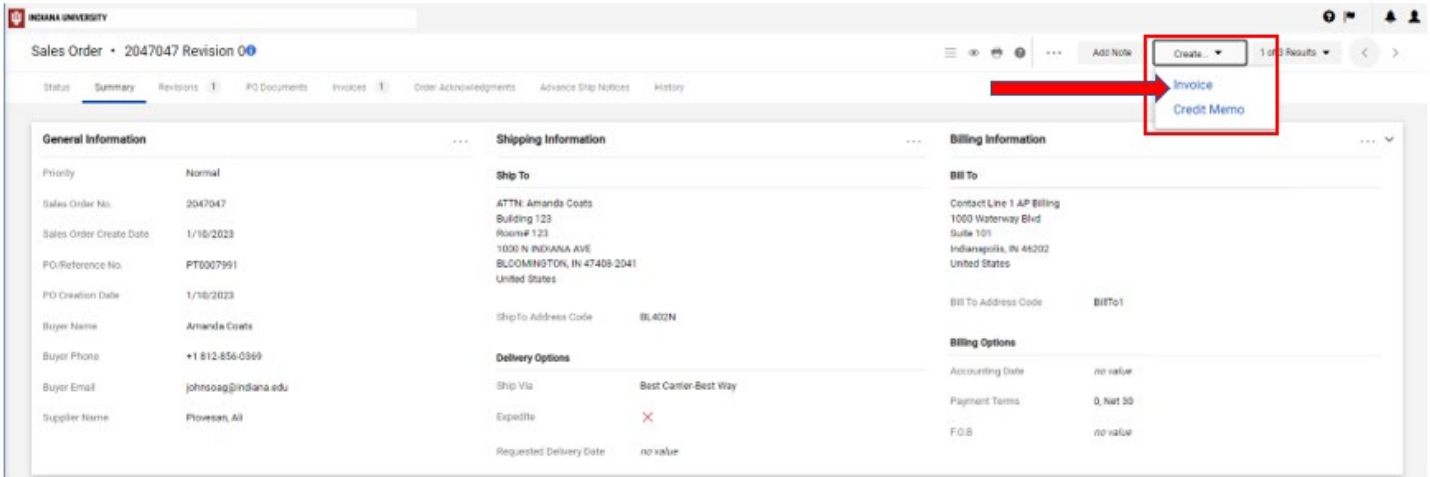
Jaggaer returns a list of POs you have received from IU. Use the **search field** at the top of the page to search for your PO number, or locate it in the list.

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.



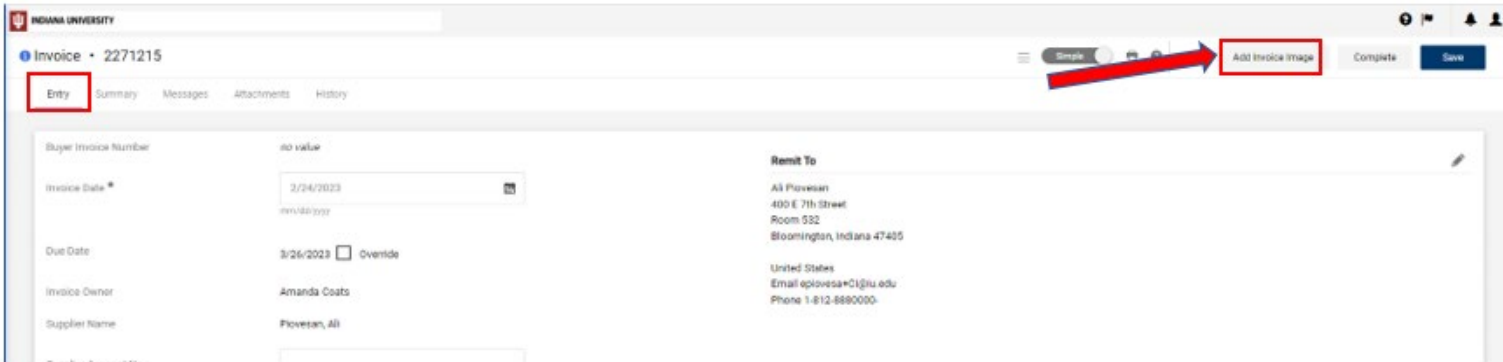
Select **Invoice** from the **Create...** drop-down menu.



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**.

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.

INDIANA UNIVERSITY

Hoosier Speaker

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

Customer: Indiana University
 Invoice Date: 11/26/2019
 PO Number: PO0005676
 Sales Order Number: 1864738
 Supplier Attachments: Invoice IU112619 (remove... add attachment...)

Save Send To Customer

Invoice Messages History

Hide header Hide value descriptions


General Information	Billing Information	Customer Invoice Information
Invoice Info Create Date: 11/26/2019 Invoice No.: IU112619 Invoice Date: 11/26/2019 Invoiced By: Hoosier Speaker Supplier: Hoosier Speaker Customer: Indiana University RMA No.: Supplier Account No.: Invoice Owner: Sarah Chavez Order Info Sales Order Number: 1864738 PO Number: PO0005676	Billing Address Contact Line 1 AP Billing 1000 Waterway Blvd Suite 100 Indianapolis, IN 46202 United States Remit To Address Remit To Address: Remit To Location List: Address Hoosier Speaker 1234 St Bloomington, IN 47405 United States Email: hoosiersupplier@gmail.com Phone: 1-812-855-1234 Toll Free Phone: 1-812-8551234-	⚠ Customer invoice information unavailable.

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

Invoice • 2271661

- Entry
- Summary
- Messages
- Attachments
- History

Buyer Invoice Number	no value
Invoice Date *	<input type="text" value="2/25/2023"/>  <small>mm/dd/yyyy</small>
Due Date	3/27/2023 <input type="checkbox"/> Override
Invoice Owner	Amanda Coats
Supplier Name	Plovesan, Ali
Supplier Account No.	<input type="text"/>
Invoice Number *	<input type="text"/> <small>Required</small>
Currency	US Dollar
Sales Order Number	2047047
Customer	Indiana University TEST SITE
Paid Date	no value
Payment Cancel Date	no value
<input type="checkbox"/>	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

		Header-level
Terms Discount		0.00 USD
Discount	→	<input type="text" value="0.00"/>
Sales Tax	→	<input type="text" value="0.00"/>
VAT	→	<input type="text" value="0.00"/>
Shipping	→	<input type="text" value="0.00"/>
Handling	→	<input type="text" value="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	<input type="text" value="100.00"/>	<input type="text" value="5"/>	500.00

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

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

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.

Navigation bar with icons for help, chat, notifications, and user profile.


Buttons: **Simple** (toggle), **Add Invoice Image**, **Complete**, **Save** (highlighted with a red box).

Below the buttons is a large empty text area with a pencil icon in the top right corner, indicating that the invoice content is read-only.

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	Type <input checked="" type="radio"/> Invoice <input type="radio"/> Credit Memo
Invoice Status Pending	Invoice No. <input type="text"/>
Supplier Invoice No. 5465	Invoice Date 2/25/2023  <small>mm/dd/yyyy</small>
Invoice name 2023-02-25 epiovesa+Cl@iu.edu 03	PO Number <input type="text"/> Optional PO Number
Invoice date 2/25/2023	Currency US Dollar ▼
Invoice total 5,000.00 USD	
Number of line items 1	

Create