

Welcome to IPP!

The Invoice Processing Platform (IPP) is a secure, Web-based service for federal agencies and their vendors that manages government invoicing from purchase order (PO) through payment notification.

New to IPP?

- Enrollment will be initiated by the agency with which you are doing business. Once an agency has enrolled you, as the initial vendor administrator, you will receive an email from IPP asking to either use an existing ID.me or Login.gov account or create a new one to log in to IPP.
- Remember to use your IPP account email address, to automatically link your IPP account to your ID.me or Login.gov account. If you use a different email address, IPP will not be able to link your account.
- If an existing ID.me account is used, you must ensure that your IPP account email address is added to the account as the *primary email address*.

Log in to IPP

- 1. Using a Web browser, go to the IPP Web site at <u>http://www.ipp.gov</u>.
- 2. On the top right, select Collector from the Sign in as a: list.



3. On the log-in screen, enter your User ID and password. Click **Submit**.

Tips

- Search: The % symbol acts as a search wildcard on each of the tabs in the Collector module. When you type % in a search box and click Go, the search results display all content.
- Quick Search: From the Home tab, you can view your purchase orders, invoices, and payment activity on one screen. To do this,

click the **Go** button next to the Quick Search box (or type % in the Quick Search box and click **Go**). From here, you can make edits and take action as your permissions allow.



Common How-Tos

See below for instructions on performing common tasks (ex: find and view POs, turn a PO into an invoice, check invoice status, and review payment information).

Conduct a Quick Search for POs, Invoices, and Payments

To view your purchase orders, invoices, and payment activity from the Collector module Home tab, do one of the following:

- In the Quick Search box on the top left, click Go.
- Or type % in the Quick Search box and click Go.

A snapshot of all the activity associated with your profile appears. To view an individual item, click the link in the first column or scroll to the far right and click **View**.

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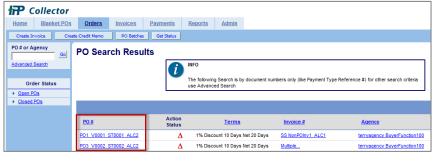
Note: To familiarize you with the IPP interface, the following procedures describe how to complete tasks from the Orders, Invoices, and Payments tabs. You can also complete these tasks from the Home tab by conducting a Quick Search, viewing a specific item (purchase order, invoice, etc.), and completing the subsequent steps in the instructions that follow.

Find and View Purchase Orders

- 1. Click the **Orders** tab. By default, open POs for the last 30 days appear.
- 2. To view all your purchase orders, find the PO # or Agency search box on the top left and do one of the following:
 - Click Go.
 - Type % in the PO # or Agency box and click **Go** to use the wildcard symbol to search for all POs. *Note: Click Advanced Search to enter specific search criteria.*

fP c	ollec	tor			
Home	Blank	tet POs	Orders	Invoices	Payments
Create Inv	voice	Create	Credit Memo	PO Batches	Get Status
PO # or Ag		Go	Open PO	Ds for las	st 30 days

3. On the PO Search Results page, locate the PO you want to view. From the PO # column, click the PO or scroll to the right and click **View**.



The PO selected appears.

Note: If there is only one PO on file, it will open by default.

	PO10_V0001_ST0001_ALC1 h Purchase Order number or Contract number shown here	Revision #0		
Status: Open		Create Invoice	Create Credit Memo Print	Related Documents Histo
	Issuing Office:	Ship to:	PO Date:	May 1, 2012
	Issuing Office: IssueAgencyName100	Ship to: See individual schedule items on the PO for ship to information.	Order Number:	P010_V0001_ST0001_ALC1
	IssueAgencyDept100	bee individual denedule items of the Fortion ship to information.	Contract No:	Contract Num60
	IssueAgencyStreet100 IssueOfficeCity100 IssueOfficeState100 IssueOfficePostCd30		Subject to:	Subject to terms and conditions of above numbered contract
			Buyer Name:	BuyerName240
			Buyer Phone:	BuyerPhoneNumb60-617-973-3560
			Buyer Email:	BuyerEmail240
			Contracting Officer:	ContractOfficerName100
	Bill To:		Phone:	ContractOfficerPhone60
terryagency	terryagency BilingLocation240		Email:	ContractOfficerEmail240@email.com
terr jugene)	BillingAddress1-100 BillingAddress2-100 BillingAddress3-100		CO Technical Representative:	COTRName100
	BillingCity100 BillingState100 BillingPostCd30		Phone:	COTRPhone60
			Email:	COTREmail240
			Appropriations Data:	Appropriation100
			FOB point:	FOBTerms250
	Supplier: VendorName100		Place of Inspection:	Inspection100
terrylandscapes1	terrylandscapes1		Acceptance:	Acceptance100
,	VendorAddress1-100 VendorAddress2-100 VendorAddress3-10	0	Deliver on or before:	See individual items.
	VendorCity30 VendorState30 VendorPostCd20		Payment Terms:	Net 45 Days
			Total Amount:	830,217.91

Creating Invoices

There are several ways to create an invoice. Here we will show you how to create an invoice from a purchase order. For more information on other methods of creating invoices (including via an eFile upload or by copying an invoice from another invoice), see the IPP Collector User Guide.

Note: On the Home tab, check the Quick Links section to see if you have a Create Invoice link. If you see this link, you have the ability to create and edit invoices. If you do not see this link and need to create an invoice, contact the Collector Administrator for your organization to request the appropriate permissions.

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Home	Blanket POs	Orders	Invoices	Payments	Reports						
	Quick Search Go Home Page										
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Invo	ice Status	Create	Invoice	1							
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Create an Invoice from a Purchase Order

- 1. Click the **Orders** tab. Find and view the PO you want to invoice using the previous procedure.
- On the top right of the Purchase Order detail page, click Create Invoice. Note: Do not use the Create Invoice buttons outside of the PO (on the top and bottom left) for this procedure as doing so will create invoices from a blank form.

Purchase Order #PO10_V0001_ST0001_ALC1 Important: Mark all packages with Purchase Order number or Contract number shown here	Revision #0	
Status: Open	Create Invoice	Create Credit Memo Print
Issuing Office: IssueAgencyName100 IssueAgencyOrep1100 IssueAgencyStreef100	Ship to: See individual schedule items on the PO for ship to information.	PO Date: Order Number: Contract No: Subject to:
IssueOfficeCity100 IssueOfficeState100 IssueOfficePostCd30		

A new invoice page appears with information pre-filled based on the content of the PO.

- 3. Enter the information requested for the invoice.
 - Complete all required fields marked with an asterisk (*).
 - Type an invoice number. Be sure to adhere to any invoice numbering guidelines provided by your agency.
 - Use the format mm/dd/yyyy for date fields (if required).
- 4. Review the different PO lines at the bottom of page.
 - Enter information for the lines being invoiced (ex: dates).
 - Review the QTY and Unit Price fields and update accordingly.
 - If you are not invoicing for all the items in the PO, deselect the lines you do not want to include. To do this, uncheck the boxes to the left of the line item.
- 5. Enter comments (up to 240 characters) if required.
- 6. If required, add attachments to the invoice.
 - On the top or bottom right, click **Attachments**.
 - In the pop-up box, click Browse and select your file attachment.
 - Click **Open** to select the attachment.

7. On the Attachments page, click **Attach** (top right). Then click **Back** to return to the Invoice page.



- 8. Once finished entering information for the invoice, do one of the following:
 - Click **Save as Draft** to view the invoice before submitting it. *Saving as draft does not submit the invoice to the agency.*
 - Click **Submit.** This locks the invoice and sends it to the agency for approval.

Check Invoice Status

- 1. Click the **Invoices** tab. By default, invoices pending approval for the last 30 days appear.
- 2. To view the status of your invoices, do one of the following:
 - For invoices from the last 30 days: From the Invoice Status column on the left, click one of the statuses (ex: Draft, Pending Submission, Approved to Pay, etc.). These default to a 30-day view of information.

	Invoice Status
Þ	<u>Draft</u>
÷	Pending Submission
×	Pending Approval
×	Approved to Pay
×	Scheduled to Pay
•	Paid

 For all invoices: In the Invoice # or Agency search box, click Go (or type % and click Go). Note: Click Advanced Search to enter specific search criteria.



The Invoice Search Results page appears. The Status column indicates the invoice status (ex: Pending Approval, Approved to Pay, In Exception, etc.). For more information about the invoice, go to the last column and click **View**.

Invo	vice Search Results	The following Search is b use Advanced Search	y document numb	ers only (like Paym	ent Type Reference	#) for other search criteri		of 17 Previous N	lext
CM	Invoice #	PO # / Blanket PO #	Agency	Amount	Invoice Date 🗹	Scheduled Pay Date	<u>Status</u>	Document Source	e
	BPO Inv1 ST0001 ALC2	BP01 V0001 ST0001 ALC2	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	BPO2 Inv2 ST0002 ALC1	BP02 V0002 ST0002 ALC1	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	BPO hv3 ST0002 ALC2	BP03 V0002 ST0002 ALC2	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	BPO Inv5 ST0003 ALC1	BP05 V0003 ST0003 ALC1	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	BPO Inv4 ST0001 ALCNone	BPO4 V0001 ST0001 ALCNone	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	BPO Inv8 ST0005 ALC1	BP08 V0005 ST0005 ALC1	terryagency	10,009.55 USD	Oct 25, 2013		In Exception	Original	View
см	BPO5 V0003 ST0003 ALC1 credit	BP05 V0003 ST0003 ALC1	terryagency	100.10 USD	Oct 25, 2013		Pending Approval	Original	View
	PO Inv1 ST0001 ALC2	P010 V0001 ST0001 ALC1	terryagency	100.10 USD	Oct 25, 2013		Approved to Pay	Original	View

View Payment Information

1. Click the **Payments** tab. By default, payments for the last 30 days appear.

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											Add Filters
TIN	Payee Name	Payment Type	Payment Type Reference #	Invoice #	<u>₽0</u> #	Agency	Payer Name	Amount	Issue Date 🗹	Status	
0000006770	HSTelecomCo1	ACH	12345678	Inv1 PO1 ALC2	<u>P01</u>	governmentagency	JUDICIARY BRANCH - DISTRICT COURT - US VIRGIN ISLAND	1,800.00 USD	Dec 11, 2013	Settled Full	View

2. To view all your payments, in the **Payment Type Reference #** search box, click **Go** (or type % and click **Go**). *Note: Click Advanced Search to enter specific search criteria.*

 Locate the line containing the payment data you want to display and click View. Payment information for the item selected appears.

				Print	Related Documents	Download History
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					Payment Ty	ype: ACH
Pay To:	HSTelecomCo1				Issue (Date Dec 11, 2013
	One Eight Zero Zero US Dol	ac.			Amo	unt: 1.800.00 USD
	05	Treasury				
sittance information 1 of 1						
	Invoice Date	P0 Number	Invoice Amount	Discount	Payment	Additional Data
nvoice Number	Invoice Date 12/12/2013	P0 Number P01	Invoice Amount 2,900.00	Discount 200.00	Payment 1,000.00	Additional Data
woice Number v1_P01_ALC2						
Nitance Information 1 of 1 nvoice Rumber r1_P01_ALC2 piler Bank Account lank Name	12/12/2013					

Note: Paid invoices can also be displayed from the Invoices tab by clicking the **Paid** link on the left side. Click **View** to display payment data for a specific invoice.

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Contact IPP

Have questions?

Call IPP Customer Support at (866) 973-3131. We're available 8 am to 6 pm (ET) Monday through Friday (except federal holidays).

Email us at IPPCustomerSupport@fiscal.treasury.gov.