Getting Started with the IPP Collector Module

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,** so we can automatically link you IPP account to your ID.me or Login.gov account. If you use a different email address, we will not be able to link your account.
- **If an existing ID.me account will be used,** users must ensure that their IPP account email address is added to the account as the primary email address

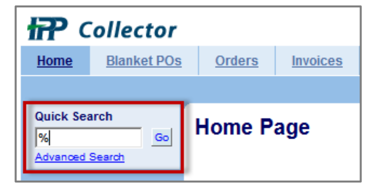
Log in to IPP

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

3. On the log-in screen, select ID.me or Login.gov.

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

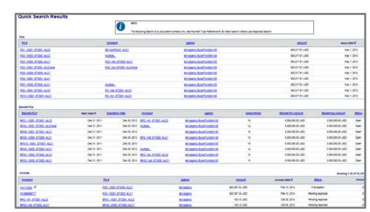
See below for instructions on performing common tasks (ex: find and view POs, turn a PO into an invoice, check invoice status, and review payment information).

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**.

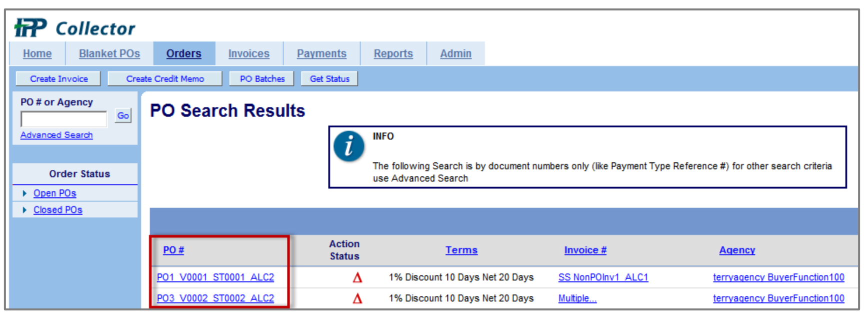


Note: *To familiarize you with the IPP interface, the following procedures describe how to complete tasks from the Orders, Invoices, and Payments tabs. You can also complete these tasks from the Home tab by conducting a Quick Search, viewing a specific item (purchase order, invoice, etc.), and completing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

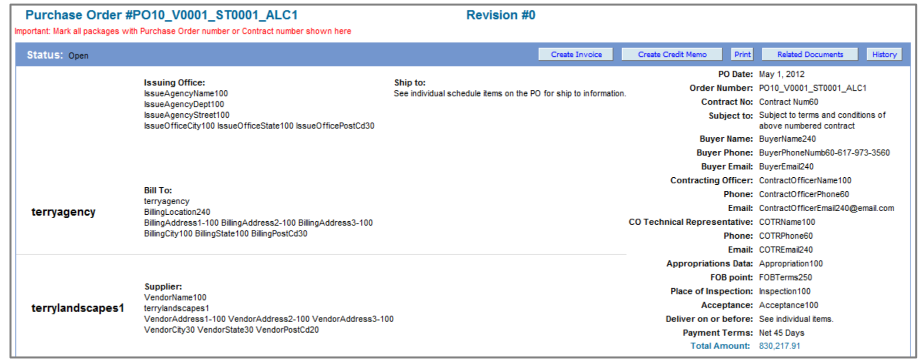
Find and View Purchase Orders

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.*

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.

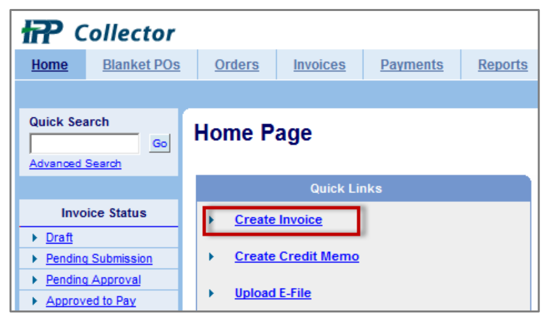


Note: *If there is only one PO on file, it will open by default.*

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.*



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.
2. 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.*

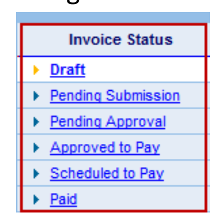
A new invoice page appears with information pre-filled based on the content of the PO.

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.

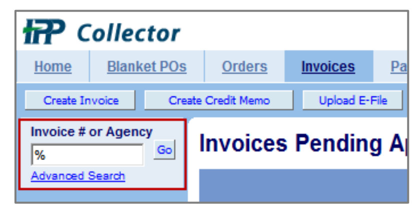
8. Once finished entering information for the invoice, do one of the following:
   - Click **Save as Draft** to view the invoice before submitting it. *Saving as draft **does not** submit the invoice to the agency.*
   - Click **Submit.** The submission confirmation pop-up will appear. Acknowledge by checking the box and click **Confirm.**

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.

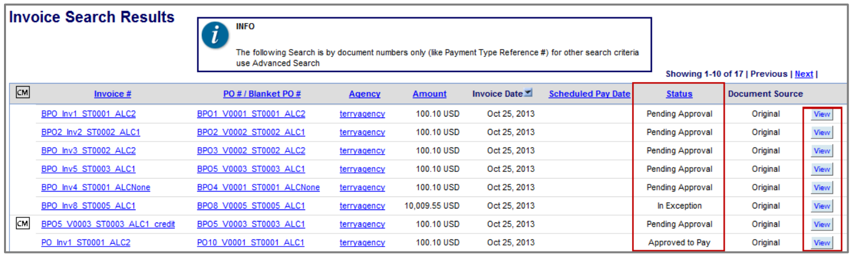


   - **For all invoices**: In the **Invoice # or Agency** search box, click **Go** (or type **%** and click **Go**). ***Note****: Click Advanced Search to enter specific search criteria.*



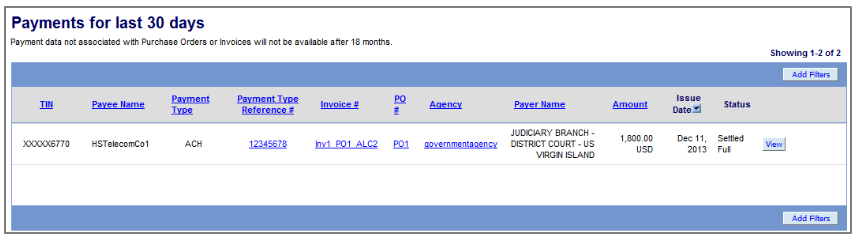
The Invoice Search Results page appears. The Status column indicates the invoice status (ex: Pending Approval, Approved to Pay, In

Exception, etc.). For more information about the invoice, go to the last column and click **View**.



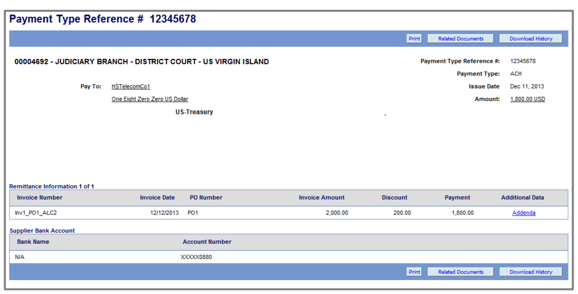
View Payment Information

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

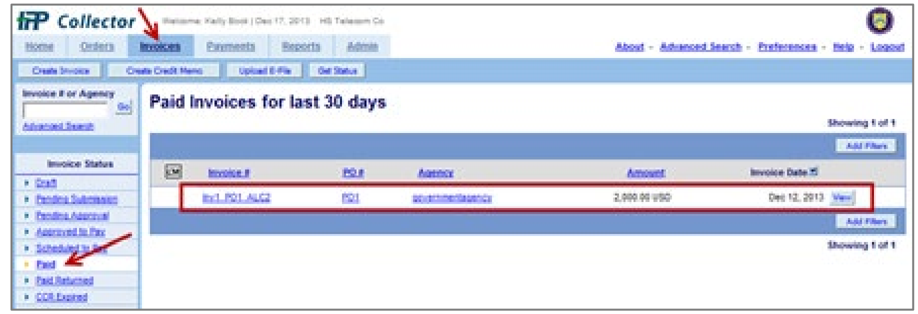


2. To view all your payments, in the **Payment Type Reference #** search box, click **Go** (or type **%** and click **Go**). ***Note***: *Click Advanced Search to enter specific search criteria.*

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



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.*



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).

Submit a request using the Customer Support Form.