Welcome to IPP!

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

How to Log into IPP

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.

New to IPP?

- Look for two e-mails from IPP (stls.ipphelpdesk@stls.frb.org). These emails notify you of your access to the IPP Collector module. The first email contains your IPP User ID. The second (which you will receive within 12 hours of receiving your User ID) contains your temporary password.
- Remember to log in within 90 days! It is important to log in within 90 days of receiving your User ID and password to ensure your initial password is not deactivated.
- Update your password. To ensure the security and ongoing activation of your account, you are required to log in and update your password regularly.
- Security Reminder. As an IPP Collector, you acknowledge that access to IPP is restricted by IPP Credentials, which the holder will not divulge to anyone.

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. From here, you can make edits and take action as your permissions allow.

Common How-Tos

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.
The steps in this document explain the quickest way to perform a task.

**How to Find and View Purchase Orders**

1. Click the **Orders** tab. By default, open POs for the last 30 days appear.
2. To see the purchase orders entered by the agency, from the Quick Search box on the left sidebar, do one of the following:
   - Click **Go** to return all your POs.
   - Type all of the PO number or part of the number plus % and click **Go** to search for specific POs.
   
   **Note:** Click **Advanced Search** to enter refine search results.

3. On the PO Search Results page, locate the PO you want to view.
4. From the PO # column, click the PO link or click the **View** button.

The selected PO appears.

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

**Creating Invoices**

There are several ways to create an invoice. The preferred method is to create an invoice from a purchase order. For more information on other methods, including using an eFile upload, see the IPP Collector User Guide available from the Home page > News and Training.

On the Home tab, check the Quick Links section to see if you have the **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 your Collector Administrator to request the permission.
How to 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 of the page), 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.
   - Select the lines you want to invoice.
   - Review the QTY and Unit Price fields and update accordingly.
   - Complete any line comments or custom field information, if needed.

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. When you have 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.

How to 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:
   - From the Invoice Status column on the left, click one of the statuses (such as, Draft, Pending Submission, Approved to Pay). These default to a 30-day view of information.
   - In the **Invoice #** search box, click **Go** (or type a partial value with % and click **Go**). **Note:** Use 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.

How to 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 a partial value with %). Note: Use 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.

You can also view Paid invoices 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).

Email us at IPPCustomerSupport@fiscal.treasury.gov.

Have your IPP User ID on hand when you contact IPP Customer Support.