

Baylor  
College of  
Medicine



# Portal Invoicing Reference Guide

# Supplier Portal Invoicing



## Portal Invoicing ('PO Flip')

This guide outlines the Purchase Order (PO) Flip process.

## What is Supplier Portal Invoicing?

This allows you, the supplier, to create an invoice from a Baylor College of Medicine (BCM) purchaser's purchase order (PO). It automatically pulls all the information from each line of the PO to pre-populate a draft invoice. You can then edit the invoice to add information like your own invoice number. When complete, you can submit the invoice directly through the Supplier Portal. You can then monitor all orders and invoice statuses within the portal.

The screenshot shows the Supplier Portal interface. In the upper left navigation menu, the 'Search for Sales Orders' button is highlighted with a green box. Below the navigation menu, there is a table with the following data:

Title	Customer Service
Email	suppliers@bcm.edu
Phone	+1 713-798-4812

Below the table, there is a 'Create Invoice / Credit Memo' form, also highlighted with a green box. The form includes the following fields:

- Type:  Invoice  Credit Memo
- Invoice No.:
- Invoice Date: 01/30/2023 (calendar icon)
- PO Number: Optional PO Number
- Currency: US Dollar (dropdown menu)

A 'Create' button is located at the bottom right of the form. Below the form, there is a 'Find Invoice' section with a search bar and a 'Search' button.

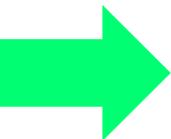
**Note:** In order for new invoices to be received and processed for payment, your organization will need to submit them through the JAGGAER portal.

To begin, go to the **Baylor College of Medicine Supplier Management Portal** via the **Customer Portal Login Link** that was provided in the supplier registration completion confirmation email.

Navigate to the **Create Invoice / Credit Memo** section.

You will need a **PO Number**, if needed use the **Search for Sales Orders** feature in the upper left navigation menu.

**Continued**



# Create an Invoice



Home Customer Portal Home

Welcome to Baylor College of Medicine Supplier Management Portal

**Customer Contact**

Name	Supply Chain Management
Title	Customer Service
Email	suppliers@bcm.edu
Phone	+1 713-798-4812

**Quick Links to Common Tasks**

[Manage Registration Profile](#)

**Contracts**

No Results

[View All Contracts](#)

**Create Invoice / Credit Memo**

Type  Invoice  Credit Memo

Invoice No.

Invoice Date

mm/dd/yyyy

PO Number

Currency

[Create](#)

**Find Invoice**

[Advanced Search](#)

To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" button.

Invoice Number(s)

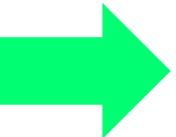
Multiple values can be separated by a comma(,).

In the **Create Invoice / Credit Memo** section enter an **Invoice Number** and **PO Number**.

Adjust other fields as needed.

Select **Create**.

**Continued**



# Verify and Submit Invoice



Verify/adjust **Invoice Entry** and **Line Item** information as needed to make sure all the details, including quantity and price, are captured correctly.

BCM also requests that you attach a PDF version of your invoice(s), to do that please select the **Add Invoice Image** button, upload the image(s) and **Save Changes**.

Once you're ready, select **Complete** and the Invoice will be submitted. Confirmation of the details will then appear.

For more information on this process, check out this video from the JAGGAER Supplier Network:

[JSN - Creating an Invoice from a Sales Order](#)

Invoice • 12345

Entry Summary Messages Attachments History

Buyer Invoice Number: no value  
Invoice Date: 1/30/2023  
Due Date: 1/30/2023  
Supplier Name: Rob's Portal Test  
Invoice Number \*: 12345  
Currency: US Dollar  
Sales Order Number: 2048185  
Customer: Baylor College of Medicine  
Paid Date: no value  
Payment Cancel Date: no value

Remit To  
test test  
123 Main St  
Durham, North Carolina 27713  
United States  
Email test@test.com  
Phone 1-919-5555555

Baylor College of Medicine

Total (1.00 USD)  
Subtotal: 1.00  
Discount: 0.00  
Tax1: 0.00  
Tax2: 0.00  
Shipping: 0.00  
Handling: 0.00  
Total: 1.00

Related Documents  
Sales Order: 2048185

1 Line

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓	1 test		EA	1.00	1	1.00

Add Invoice Image

File(s) \*  Drop file to attach, or browse.  
Maximum upload file size: 5.0 MB

★ Required fields

Invoice Submitted

Summary

Invoice number: 1000000159  
Invoice Status: Pending  
Supplier Invoice No.: 12345  
Invoice name: 2023-01-30 jaggaerwdemo+5@gmail.com 02  
Invoice date: 1/30/2023  
Invoice total: 1.00 USD  
Number of line items: 1

Create Invoice / Credit Memo

Type:  Invoice  Credit Memo  
Invoice No.:  
Invoice Date: 1/30/2023  
PO Number: Optional PO Number  
Currency: US Dollar