

JAGGAER RETURNED INVOICE TRAINING GUIDE

March 2026

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How to access a Returned Invoice:

1. The first method is to select the “flag” at the top right corner of Jaggaer. It will display a list of your Returned Invoices.

HINT: Selecting the flag will display any and all Jaggaer Actions Items in your queue to complete this may include Returned Invoices, Invoice Approvals, Returned Requisitions etc.

The screenshot displays the Jaggaer shopping homepage. At the top right, a notification flag icon is highlighted with a red box. A dropdown menu titled 'Action Items' is open, showing a list of items: 'Invoices' and 'My Returned Invoices'. The 'My Returned Invoices' item is highlighted with a red box and has a yellow badge with the number '1' next to it. The main content area includes an 'Organization Message' with sections for 'Good Friday Jaggaer Update' and 'Jaggaer 26.1 System Upgrade'. A 'Quick Links' sidebar on the right lists various actions like 'Request New Supplier', 'View Carts', and 'My Invoices'. The bottom of the page features a 'Contract Search' bar.

After selecting My Returned Invoices, a list of returned invoice will be visible:

1. Click on the specific Invoice name/number to open in order to “Action” that specific Entry.

The screenshot displays a web application interface for managing invoices. At the top, there is a navigation bar with a home icon, a 'TCU' logo, a dropdown menu set to 'All', a search bar with the text 'Search (Alt+Q)', a currency indicator '0.00 USD', and notification icons. Below the navigation bar, the main content area is titled 'Invoices' and includes a 'Create Invoice' button. A sub-section labeled 'My Drafts' is visible, with a search bar. The main table shows 'Showing Results 1 - 1 of 1' and contains one invoice entry. The invoice number 'JINV000147956' is highlighted with a red box. The table columns include Invoice Name, Supplier Invoice No., Supplier Name, PO No., Status, Invoice Create Date, Invoice Date, Invoice Type, Invoice Total, and Actions.

INVOICE NAME	SUPPLIER INVOICE NO.	SUPPLIER NAME	PO NO.	STATUS	INVOICE CREATE DATE ↓	INVOICE DATE	INVOICE TYPE	INVOICE TOTAL	ACTIONS
JINV000147956	501234	Smith Temporaries dba CornerStone Staffing	P00120016	• Returned	3/12/2026	3/8/2026	Invoice	50,000.00 USD	 

Once you have selected the specific invoice:

1. Go to the Comments tab for the reason that your invoice was returned.
2. Instructions on what to fix/correct will be found here.
3. After reading, then select the Entry tab to return to the invoice form to correct.

The screenshot displays the TCU invoice system interface. The top navigation bar includes a search bar, currency (0.00 USD), and user profile. The main header shows the invoice details: "Invoice • Smith Temporaries dba Corne... • 196427515". Below this, a series of tabs are visible: "Entry", "Summary", "Matching", "Supplier Messages", "Comments 2", "Attachments 1", and "History". The "Entry" and "Comments 2" tabs are highlighted with red boxes. The "Entry" tab is currently active, showing a form with fields for Voucher Number (JINV000147956), Invoice Date (3/9/2026), Due Date (3/9/2026), Invoice Owner (Mary Grace Held), Supplier Name (Smith Temporaries dba CornerStone Staffing), and Supplier Invoice No. (501234). The "Remit To" section includes the address: PO Box 226724, Dallas, Texas 75222-6724, United States, Address Id 3. A "Summary" panel on the right shows a "Draft" status with a warning: "Be aware of these issues. You may review and proceed. Extended Price is outside the allowed tolerance." Below this, a table lists the invoice details: "Smith Temporaries dba CornerStone Sta...", "Supplier Invoice No. 501234", and a "Total (50,000.00 USD)" section with a breakdown of Subtotal (50,000.00), Discount (0.00), Tax1 (0.00), Tax2 (0.00), Shipping (0.00), and Handling (0.00). A "Related Documents" section lists "Purchase Order: P00120016" and "Requisition: 210570413".

The screenshot displays the TCU invoice system interface, focusing on the "Comments" tab. The top navigation bar is the same as in the previous screenshot. The main header shows the invoice details: "Invoice • Smith Temporaries dba Corne... • 196427515". Below this, a series of tabs are visible: "Entry", "Summary", "Matching", "Supplier Messages", "Comments 2", "Attachments 1", and "History". The "Comments 2" tab is highlighted with a red box. The "Comments" section shows "Records Found: 2" and a dropdown menu for "Show comments for" set to "Invoice". Two comment records are displayed:

- Johnny Trevino** - 3/12/2026 9:15:35 AM: This is a test. Delete entry. (Invoice - JINV000147956, Invoice Returned)
- Mary Grace Held** - 3/12/2026 9:09:00 AM: Test return invoice for demo. (Invoice - JINV000147956, Comment Added)

Once you have read the instructions on why/how to “fix” the Returned Invoice, the following fields are available to edit and correct:

1. Invoice Date.
2. Invoice Number.
3. Amount of the invoice.
4. Remit Address (by selecting the “pencil” icon).
5. Last, once any and all edits are completed, select “Save”.

The screenshot displays the TCU invoice management interface. The top navigation bar includes a search bar, currency (0.00 USD), and a 'Save' button. The main content area shows the invoice details for 'Smith Temporaries dba CornerStone Staffing' with invoice number 196427515. The 'Entry' tab is selected, showing fields for Voucher Number (JINV000147956), Invoice Date (3/9/2026), Due Date (3/9/2026), Invoice Owner (Mary Grace Held), Supplier Name (Smith Temporaries dba CornerStone Staffing), and Supplier Invoice No. (501234). The 'Remit To' field is highlighted, showing the address: PO Box 226724, Dallas, Texas 75222-6724, United States, Address Id 3. The 'Summary' section shows a total of 50.00 USD. The 'Related Documents' section lists Purchase Order: P00120016 and Requisition: 210570413. The 'What's next?' section shows the next step as Matching Exceptions and the approver as Trevino, Johnny. The '1 Line' section shows a table with columns for Line, Status, PO Line, Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. The first line item is 'Finance & Administrations temporary staffing' with a unit price of 10.00, a quantity of 5, and an extended price of 50.00.

Line	Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓	1	Finance & Administrations temporary staffing			10.00	5	50.00

Please ensure that a copy of the Invoice that you are paying is attached. To accomplish follow:

1. Select the Attachments tab.
2. Select Add Internal Attachments.
3. Last, select Complete to submit invoice for payment.

The screenshot displays a web interface for managing an invoice. At the top, the header includes the TCU logo, a search bar, and a currency indicator (0.00 USD). The main content area shows the invoice details: "Invoice • Smith Temporaries dba Corne... • 196427515". A navigation bar below the header contains tabs for "Entry", "Summary", "Matching", "Supplier Messages", "Comments 2", "Attachments 1", and "History". The "Attachments" tab is selected and highlighted with a red box. Below this, a section titled "Attachments found: 1" contains a table with one entry: "TCULogo_purple_5X7-01.jpg" (73k, File, Document, Internal, 3/12/2026 9:09 AM). A "Select Invoice Image" button and an "Add Internal Attachment" button (highlighted with a red box) are located above the table. On the right side, a "Summary" panel shows the invoice status as "Draft" and lists the following items:

Summary	
Draft	
Smith Temporaries dba CornerStone Sta...	
Supplier Invoice No.	501234
Total (1,500.00 USD)	
Subtotal	1,500.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	1,500.00

Below the summary, a "Related Documents" section lists "Purchase Order: P00120016" and "Requisition: 210570413". A yellow "Complete" button is located in the top right corner of the interface, also highlighted with a red box.

Once your Invoice is submitted, this green box will appear and a JINV number will be assigned.

✓ Invoice Submitted

Summary		Create Invoice	
Invoice number	JINV000147956	Type	Invoice ▾
Invoice Status	Pending	From	PO ▾
Supplier Invoice No.	501234	PO numbers	<input type="text"/> 🔍
Invoice name	2026-03-12 108018342 01	<input type="button" value="Create"/>	
Invoice date	3/9/2026		
Invoice total	1,500.00 USD		
Number of line items	1		
Created for the PO No(s)	P00120016		



QUESTIONS?

Submit to

procurement@tcu.edu

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