Contents

How to navigate the Vendor Portal.................................................................3
Vendor Registration Process...........................................................................6
Resetting the Password..................................................................................9
Accessing User Account and Changing the Password.................................11
How to view Purchase Orders........................................................................14
How to view Invoices on Vendor Portal......................................................18
How to create and submit invoices...............................................................20
How to view rejected invoices and edit the invoices....................................25
How to view payments..................................................................................29
How to navigate the Vendor Portal

Standard Process
How to navigate the Home page of the DC Vendor Portal

Overview

Performed by
Any User

Interface Used
DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps
In a browser, open www.vendorportal.dc.gov
Home page is divided into 3 sections

a. Login/Sign up section

This section allows all registered vendors to use their login credentials to access the portal. New users can register by selecting “Register Company” button.
Note: The supported browsers and terms for use of the portal can be viewed by selecting the related button.

b. Info Center Section (No login required)

This section provides a list of DC payments made by the District to vendors starting in FY 2017.

Users can search for payments made by selecting the DC Payments link.
• Users may search by Purchase Order Number, Invoice Number, Check Number or Voucher Number.
• The Info center also provides fiscal year-end submission guidelines, link to Quick Payment Act (QPA) and other vendor communications.

c. Quick Links section

This section provides quick links to:
• View Tutorials
• Frequently Asked Questions (FAQs)
• Contact Us (Helpdesk information)
Vendor Registration Process

Purpose
To register on the DC Vendor Portal and to create a vendor account.

Overview
Vendors require an account to submit electronic invoices to District of Columbia.

Performed by
District of Columbia Vendors

Interface Used
DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- From the Homepage, select the Register company button or Select the Register tab from the main menu.
- The vendor must read and agree to the terms of registration to begin the registration process and select the “Begin Registration Here” button.

The registration form is divided into three sections:

a. Company Information
b. User Information
c. Attachments
Note:

If a user tries to re-register using the same email address, following alert messages will appear:

For fully approved Registrations: “An account is already registered with this email address, please login or reset your password.”

For registrations in processing or rejected registrations: “Your account registration is already in process; you will be notified soon via Email.”

Creating a user account on DC Vendor Portal is a free of cost service.

Up to 10 user accounts can be registered for each vendor.

a. Company Information

The vendor must provide the following information: Company Name, Address, City, Postal Code, State, FEIN Number, DUNS #, a recent DC Purchase Order Number (if applicable). The CBE (Certified Business Enterprise) number and DC Business License fields should be provided (if applicable).

The vendor must also provide company email address and phone number. All required fields are marked with asterisk (*) symbol next to the field must be completed.
b. User Information

The vendor must provide the user’s information and they all are mandatory fields. It contains First and Last Name, Title, Phone Number, Email address and Password. User email address will be the login id.

![User Information Form]

<table>
<thead>
<tr>
<th>User Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Phone number</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Re-enter email</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Confirm password</td>
<td></td>
</tr>
</tbody>
</table>

![Attachments Form]

<table>
<thead>
<tr>
<th>Attachments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>W9: Choose File</td>
<td>No file chosen</td>
</tr>
<tr>
<td>Other file: Choose File</td>
<td>No file chosen</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
</tr>
<tr>
<td>I'm not a robot</td>
<td></td>
</tr>
</tbody>
</table>

Once all required documents and fields have been attached and completed, select the “Register” button to complete the registration process.

Once the registration form is submitted, the vendor will receive the email confirmation about the submission. The registration will be processed by DC Government within 2 business days.

After the registration is approved, users will receive an email with an activation link. Click on the activation link will activate the account. Vendor account is created. If the registration is rejected, the vendor will receive an email with reasons for rejection. In this case, vendor must make necessary changes and resubmit the application.
Resetting the Password

Standard Process
How to reset your password by using Forgot Password feature on the DC Vendor Portal

Overview

Performed by
Registered DC Vendor

Interface Used
DC Vendor Portal (www.vendorportal.dc.gov)

Browsers Supported
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps
In a browser, open www.vendorportal.dc.gov

- Select “Forgot Password” link
• Enter registered email address and select the Submit button

• A confirmation email will be sent to the registered email address with a link to reset the password.
• Select the reset password link in the email which then opens the Reset Password page.

• Vendor needs to enter registered email and choose a new password to secure credentials by selecting “Reset” button.

---

Tip: Password must be at least 8 characters, and include a lower-case letter, one capital letter, and one number.
Accessing User Account and Changing the Password

Standard Process
How to view and access the user profile on the DC Vendor Portal

Overview

Performed by
Registered DC Vendor

User Interface
DC Vendor Portal (www.vendorportal.dc.gov)

Browsers Compatible
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- Login from the homepage of the portal with user credentials
- On the top right corner of the home page, select the Account tab
The following options appear in the menu:

a. My Account
b. Change Password
c. Company Profile

---

Note: User information is view only

---

a. My Account

Users can view their information. For any profile changes, please contact the help desk. (see Contact Us tab under Quick links)
b. Change Password

Users can change their password by entering current password and new password.

![Change Password](image)


c. Company Profile

- Users can view list of other users associated with their organization.
- Users can deactivate any user by selecting the “Deactivate” button.

![Company Profile](image)
How to view Purchase Orders

Standard Process

How to view purchase orders on the DC Vendor Portal

Overview

Performed by

Registered DC Vendor

Interface Used

DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers

The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- Login from the home page of portal with user credentials

There are 2 ways to view purchase orders issued in the last 30 days:
a) By selecting the Purchase Orders button or Purchase Orders and,
b) By selecting Purchase Order tab on the menu bar
a. Purchase Orders button or Purchase Orders on the Dashboard

PO’s can be found by clicking the select tab.
b. Purchase Order Tab on the Menu Bar

- Vendors can search for purchase orders by following fields: Purchase Order Number, Invoice Number, Agency or Ordered Date.
- Vendors can view Purchase Orders that are not fully invoiced (i.e. purchase orders with balances in the “Amount invoiced to date” field) by checking the box next to “Show PO’s that are not fully invoiced”.
- Selecting a Purchase Order Number opens the Purchase Order Details page
- The purchase order details can be exported to PDF or CSV formats.

Purchase Order Details

Vendors can select the Purchase Order Number to view the details.
Tip: An invoice can be created for this purchase order by selecting the “Create Invoice” tab at top of the screen.

- All the fields on Purchase Order details page are pre-populated from DC procurement system (PASS) and are not editable.
- This page can be printed or exported to PDF or CSV format.
- Section 1 contains Purchase Order Number, Purchase Order Amount, Amount Invoiced To Date, Amount Remaining to Invoice, Contract Number, Ordered Date and Supplier name.
- Section 2 contains Line Item details such as Line Number, Part/Description, Quantity, Price and Line Total of the purchase order.
- Section 3 contains Ship To, Bill To, Deliver To, Point of Contact (POC), Comments and Invoices tabs.
Note: The invoices tab in section 3 allows the vendor to obtain a list of invoices related to the purchase order.

How to view Invoices on Vendor Portal

Standard Process

How to view invoices on the DC vendor portal

Overview

Performed by

Registered DC Vendor

Interface Used

DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers

The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- Login from the home page of the portal with user credentials

There are two ways to view the invoices:

a. By selecting the Invoice button or Invoices on the Dashboard.
b. By selecting the Invoice tab on the Menu bar.
a. Invoice button or Invoices on the Dashboard

- Dashboard will display details of invoices for the last 30 days
- Vendor can sort by Agency, Invoice Number, PO Number, Create Date, Invoice Amount, Invoice Status (Approved, Rejected, Pending and, In Review).
- Details can be exported into PDF or CSV formats.
- Vendor can search historical data of invoices by Purchase Order Number, Invoice Number, Agency and Invoice Create Date.

b. By clicking the Invoice tab on Menu bar (to view historical invoices)
How to create and submit invoices

Standard Process
How to create and submit an invoice on the DC Vendor Portal

Overview

Performed by
Registered DC Vendor

Interface Used
DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

• In a browser, open www.vendorportal.dc.gov
• Login to the home page of portal with user credentials obtained from the vendor registration process
• Vendor can create an invoice
• Three ways to create an invoice. (A) from the home page, (B) from the “Create Invoice” tab, and (C) from the “Purchase orders” tab.
A. Create Invoice from the Home page

- Select “Create Invoice” from any purchase order listed on the Dashboard
- The “Create Invoice” form will be opened

B. Create Invoice from “Create Invoice” tab

- Select the “Create Invoice” from the Menu bar
- The user will be prompted to enter the Purchase Order Number.
• Enter the Purchase Order Number
• The “Create Invoice” form will be opened

C. Create invoice from the “Purchase Orders” tab

- Select the “Purchase Orders” tab from the Menu bar
- Identify the Purchase Order for which an invoice is to be created.
- Then select the “Create Invoice” button
- The “Create Invoice” form will be opened
- The create invoice form is divided into three parts: Invoice Details, Line Items, and Remit to/Bill to.
Invoice Details:

- Vendors must enter a unique Vendor Invoice Number (which is a mandatory field. All other fields may be required). Supporting shipping documents and other documents can be uploaded by clicking on “browse” and selecting the file.
- Pre-populated fields from DC procurement system (PASS) include Contract number, Invoice Create Date, Purchase Order Number, Purchase Order Amount, Amount Invoiced to Date and Amount Remaining to Invoice.
Line Items:

- Portal will display all the line items from purchase order. Vendor must enter the quantities per line item. Portal automatically updates the total amount based on line item quantities entered.

Remit to / Bill to:

- Remit to and Bill to sections are pre-populated from DC procurement system (PASS). The vendor can enter comments in the “Comments” section. Once the invoice is submitted, portal will generate a message of its successful submission and processing.

---

💡 Tip: System will not allow duplicate invoice numbers

---

✍ Note:

Invoices must be submitted upon creation; they cannot be saved for later submission.

Vendors cannot create an invoice if the “amount to be invoiced to date” is equal to $0.00
How to view rejected invoices and edit the invoices

Standard Process
How to view and edit the rejected invoices and re-submit on vendor portal

Overview

Performed by
Registered DC Vendor

User Interface
DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- Login from the home page of portal with user credentials.
- Select Invoices tab on menu bar at top of the page.
- Identify the rejected invoice by using Purchase Order Number, Invoice Number, Agency or Invoice Create Date.

The results can be sorted by the following field names: Agency, Invoice number, Purchase Order number, Create Date, Invoice Amount, Invoice Status by selecting the up/down arrow buttons next to the field names.

- Users can view comments for the rejection reasons.
- Select the “Edit” button in the Action column to resubmit the rejected invoices.
Tip: Only rejected invoices can be edited.

Invoices must be submitted upon creation; they cannot be saved for later submission.
The following screen appears when the user selects the edit button.

- A new version of the invoice will be created.
- Users must complete all the mandatory fields and make necessary changes to address the comments.

---

Note: When re-submitting the invoices, please attach all the supporting documents. Earlier submitted supporting documents will not be available in the system.

---

- Comments can be added in the vendor “Comments” section.
- After comments, have been made, select submit button.
- Once submitted, a new version of invoice will appear on the dashboard with the invoice status as “Pending” as highlighted in the screen below.
<table>
<thead>
<tr>
<th>Agency</th>
<th>Invoice #</th>
<th>PO #</th>
<th>Create Date</th>
<th>Invoice Amount</th>
<th>Invoice Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCTO</td>
<td>INV55434</td>
<td>PO561481-V2</td>
<td>7/5/2017</td>
<td>$3,463.37</td>
<td>Pending</td>
<td>Copy</td>
</tr>
<tr>
<td>OCTO</td>
<td>Inv 2</td>
<td>PO561595</td>
<td>7/5/2017</td>
<td>$6,500.00</td>
<td>In Review</td>
<td>Copy</td>
</tr>
<tr>
<td>OCTO</td>
<td>Inv 1 rv</td>
<td>PO561595</td>
<td>7/3/2017</td>
<td>$7,500.00</td>
<td>In Review</td>
<td>Copy</td>
</tr>
<tr>
<td>OCTO</td>
<td>PO561505-V2, Inv 1</td>
<td>PO561505-V2</td>
<td>7/3/2017</td>
<td>$10,000.00</td>
<td>In Review</td>
<td>Copy</td>
</tr>
<tr>
<td>OCTO</td>
<td>Inv 1b2</td>
<td>PO561584-V2</td>
<td>7/3/2017</td>
<td>$407.72</td>
<td>In Review</td>
<td>Copy</td>
</tr>
</tbody>
</table>
How to view payments

Standard Process
How to view the payments on the DC vendor portal

Overview

Performed by
Registered DC Vendor

Interface Used
DC Vendor Portal (www.vendorportal.dc.gov)

Supported Browsers
The following Internet browsers: IE, Chrome, Edge, Firefox or Safari

Procedure Steps

- In a browser, open www.vendorportal.dc.gov
- Login from the home page of the portal with user credentials

Vendors can view payments made in the last 30 days.
(a) by selecting the payments button or payments on dashboard, and
(b) by selecting the payments tab on the menu bar
a. Payments button or Payments on the Dashboard

b. Payments tab on the Menu bar

- Vendors can search payments by the following fields: Purchase Order Number, Invoice Number, ACH/Check #, Voucher Number or Payment Date.
• By selecting the Details button under Actions, vendor can view payment details as per screen below.

• Vendors can view the Agency Name, Purchase Order Number, Invoice Number, Invoice Create Date, Voucher Number, ACH/Check #, last 4 digits of bank account for ACH payments.
• Vendor can export the details to PDF or CSV formats.