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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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

In a browser, open <u>www.vendorportal.dc.gov</u>

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.



Login/Sign Up	Info Center	Quick Links
Email Password Forgot Password Immod a robot Cog in Register Company Supported Browsers Terms of Use	DC Payments Fiscal Year End Invoice Submission Guidelines Quick Payment Act (QPA) DC e-Invoicing Implementation Timeline	View Tutorials FAQ's Contact Us

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.

Login/Sign Up Email	Info Center DC Payments Fiscal Year End Invoice Submission Guidelines Quick Payment Act (QPA)	Quick Links View Tutorials FAQ'S Contact US
Forgot Password	DC e-Invoicing Implementation Timeline	
Log in Register Company Supported Browsers Terms of Use		

Users can search for payments made by selecting the DC Payments link.



Home / DC Payments			
Search Use one of the search criteri	ias to find payments		
Purchase Order Number	Invoice Number	ACH/Check #	Voucher Number
Purchase Order Number	Invoice Number	Check Number	Voucher Number
C Reset Q Search			DC Payment data as of: 6/22/2017
Show 10 \checkmark entries			
Show 10 v entries Agency If PO # If Invo	ice # 🕴 Invoice Date 🕸	Voucher # 📲 ACH/Check #	If Payment Amount If Action
		Voucher # JF ACH/Check #	

- 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)

LogIn/Sign Up Email	Info Center DC Payments Fiscal Year End Invoice Submission Guidelines Quick Payment Act (QPA) DC e-Invoice implementation Timeline	Quick Links View Tutorials FAQ's Contact Us



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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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





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.

	5	•
# Home / Vendor Registration Form		
Vendor Registration Form		
Company Information		
Company name *	FEIN #: * 🔞	
Address: *	DUNS #: 😰	
Address2:	CBE# if any: 😰	
City: *	DC Purchase order # (any recent): * 🕷	0
Postal Code: *	DC Business license #: 🚳	
State: *	Company Email *	



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 jd.

User Information	
First name *	Email *
Last name *	Re-enter email *
Title: *	Password *
Phone number *	Confirm password *

c. Attachments

The vendor must attach their most recent W9 and other supporting documents. The vendor can submit comments (if any).

Attachments	
W9: * 🗊	
Choose File No file chosen	1
Other file: 🕡 Choose File No file chosen	-
Choose File No file chosen	8

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 (<u>www.vendorportal.dc.gov</u>)

Browsers Supported

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

Procedure Steps

In a browser, open <u>www.vendorportal.dc.gov</u>



• Select "Forgot Password" link



• Enter registered email address and select the Submit button

Home Register FAQ Contact Us	Ø
Home / Vorgot password Forgot password To refet your password, enter your email address.You will receive a link to reset your password. Email Submit	

- 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.

Home / Reset Password		
Reset Password		
Reset Password		
Email		
New Password	_	
A		
Re-enter New Password		
a		

• 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 (<u>www.vendorportal.dc.gov</u>)

Browsers Compatible

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- Login from the homepage of the portal with user credentials
- On the top right corner of the home page, select the Account tab



-						Welcon e Lax, Adi	Account 🕶 🛛 Lo
	lome Create Inv	voice Purchase Orde	rs Invoices	Payments		My Acco	
Purcl	10 hase Orders			20 Invoices			
Purchase Orders	s	Invoices		Payments	1		
Purchase Orders	s	Invoices		Payments			Last 30
Purchase Orders		Invoices		Payments]	Search:	
	ries	Invoices	Agency	Payments Ordered Date	PO Amount	-	Last 30
Show 10 💌 entr	ries		Agency OCTO		PO Amount # \$2,300.00	Search:	Last 30
Show 10 💌 entr	ries Title			Ordered Date If		Search: Amount Invoiced to Date	Last 30
PO Number PO PO561461 Req PO561464 GE	ries Title		осто	Ordered Date 6/6/2017	\$2,300.00	Search: Amount Involced to Date \$2,300	Last 30
PO Number PO PO561461 Req PO561464 GE	ries Title for partial receiving n req		осто осто	Ordered Date 11 6/6/2017 6/8/2017	\$2,300.00 \$2,370.00	Search: Amount Invoiced to Date \$2,300 \$2,370	Last 30 a 15 0.00 Fully invoice 0.00 Fully invoice 0.00 Fully invoice

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

DCPORTAL Hom	e Create Invoice	Purchase Orders	Invoices	Payments		8
Home / Change Passwo	ord					
Change Password						
Current Password						
Current Password						
New Password						
New Password						
Re-enter New Password						
Re-enter New Passwo	rd					

c. Company Profile

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

CPORTAL Home Crea	te Invoice Purchase Orders	Invoices	Payments		?
# Home / Company Profile					
Company					
Name	Email		Action		
Adi Lax	Adi.Lax@gmaiLco	m	My User		
Bond Bond	bond1@gmaiLcon	n	Deactivate		
Adi Lak	bond@gmaiLcom	1	Deactivate		



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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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







	Principal COUPORTAL	Home Create Invoice	Purchase On	ders Involces	Payments.	We	Koome PASS Team2 Acc	ount • Log Out	
	Search Purch								
	Purchase	rder Number Order Number 's that are not fully invoiced	Invoice Number Invoice Number	•	Agency 🕑 Select an agen ©Reset Q.Search	a	Ordered Date Last 30 Days Last 60 Days Last 60 Days Last 1 year		
	Show 10	· entries				Search	Custom	Brox Scov	
	PO#	POTHe	<u>. 1</u>	Agency II	Ordered Date 11	PO Amount 11 Am	wunt Invoiced To Date	Action 11	
	P0559890-V5	Req with Zline terrisladding I	ine: Com	OCTO	5/25/2017	\$34,000.00	\$15,000.00	Create Invoice	
	P0559889	Reg with Zine items		OCTO	5/25/2017	\$20,000.00	\$10,000.00	Create Incode	
	P0559885	Copy of test for capital funds-	prg	осто	5/24/2017	\$198,000.00	\$150,000,00	Create Invoice	
	P0559881	test for capital funds-prg		octo	5/24/2017	\$198,000.00	588,500.00	Create Incode	
	P0559720-V2	tsa 123		octo	5/23/2017	5272,810.00	\$235,956.00	Create Invoice	
	P0559725-V3	test tsa0502		осто	5/23/2017	\$150,000.00	\$6,400.00	Create Invoice	
	P0559872	prg3264test hrsbasedpo		OCTO .	5/23/2017	\$85,500.00	\$0.00	Cruite Inclus	
•	Invoice	s can search f Number, Age s can view Pur	ncy or (Ordered	Date.	_			

- 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

	Vendor PORTAL Home Cre	eate Invoice Purchase O	rders Invoices	Payments		PDF	Account Log C
# Ho	ome / Purchase Order / Purch						
	hase Order Details						
	hase Order Number: PO559803			Contract Number:			
	hase Order Amount: \$60,589.00 unt Invoiced To Date: \$59,377.2			Ordered Date: 5/10			
				Supplier: DELL COM	NPUTER CORP		
	unt Remaining to Invoice: \$1,211.	.78					
	unt Remaining to Invoice: \$1,211. ne Items	.78					
≡ Lir	-	.78			Search	د	출PDF 클 CS
≡ Lir	ne Items w 10 v entries	.78		11 Quantity		e Price J†	Line Total
≡ Lir Sho	ne Items ww 10 v entries e# # Part/Description	oft Azure Commercial + Mor	3	Quantity 50			
≡ Lin Sho 1	ne Items ww 10 v entries e# # Part/Description		3			Price 1	Line Total 🌡
≡ Lin Sho 1	e Items w 10 v entries # 11 Part/Description 6QK-00001/ Microso		3			Price 1	Line Total 🌡
≡ Lin Sho 1	e Items w 10 v entries # 11 Part/Description 6QK-00001/ Microso		2 Deliver To		Unit) I1	Price 1	Line Total \$

- 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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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.



be cting							
	AL Home Create	Invoice Purcha	ise Orders Ir	nvoices Payments		Welcome PASS Team2	Account - Log Out
	72 Purchase Orders			223 Invoices		0 Payme	
Purch	ase Orders	Invoices		Payments			
Show 10	▼ entries					Search:	Last 30 days
Agency	1 Invoice#	J† PO# J†	Create Date	11 Invoice Amount 11	Invoice Status	IL DC Comments	11 II
осто	PO559707 rv2 inv	PO559707	5/1/2017	\$1,124.75	Approved	Estimated Payment da	+ More Copy
осто	PO559707 rv3 inv	PO559707	5/1/2017	\$1,461.90	Approved	Estimated Payment da	+ More Copy
	Purch Show 10 Agency	FUCEPORTAL Home Create	Hone Create Invoice Purcha T Purchase Orders Purchase Orders Now 10 • entries Agency Invoice# PO#	Home Create Invoice Purchase Orders Verchase Orders Purchase Orders Now 10 entries Agency Involce# PO#	Home Create Invoice Purchase Orders Invoices Payments Virtual of the order Purchase Orders Payments Purchase Orders Invoices Payments Show 10 entries Po# Create Date Invoices orders	Hone Create Invoice Purchase Orders Payments Voices Payments Purchase Orders Payments Purchase Orders Payments Show 10 entries Agency Invoices Pot Create Date Invoices Invoices	Metcome PASS Tears More Create Invoice Purchase Drivers Invoices Payments Purchase Orders Invoices Payments Payments Purchase Orders Invoices Payments Search Show 10 entries Pod Create Date Invoices Description

- 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.

	for TAL Home Creat	e Invoice Purchase Orders	Invoices Pay	ments			e
# Home /	Invoices						
Search In							
Purcha	se Order Number	Invoice Number		Agency ⑦ Select an agency	-	Invoice Create Date Last 30 Days	Ŧ
			2 Reset	Q Search			
Show 10) • entries				Search		ট PDF 🖻 CSV
Agency 🌡	Invoice #	J↑ PO#	11 Create Date	11 Invoice Amount 💵	Invoice Status	11 DC Comments	Jî Action Jî
осто	A4	PO55969	6 5/2/2017	\$6.93	In Review		Сору
осто	A123	PO55969	5 5/2/2017	\$8.48	In Review		Сору
осто	4567	PO55987	6-V4 5/23/2017	\$10.00	Rejected	+ More PO Changed	duri Edit
0010							Сору
0010							

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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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

			_	_					voice eatec
	Home Create Inv	voice Purchase	Orders	Invoices	Payments	V	Velcome minds, creative		lectir eate
	55 Purchase Orders				156 Invoices		1 Paymen	bu	itton
Purchase O	Orders	Invoices			Payments				/
Purchase O	Orders	Invoices			Payments			Last 30	days
	entries	Invoices			Payments		Search:	/	days CSV
Show 10		Invoices	Agency		Payments Ordered Date	PO Amount 🏨		🖾 PDF 🗉	-
Show 10 •	• entries	ţţ		Jt			Amount Invoiced to Date	🖾 PDF 🗉	∎cSv Jî
Show 10 • PO Number 11	PO Title	it re verfying +More	осто	ţţ	Ordered Date	PO Amount 👃	Amount Invoiced to Dat	PDF	€ CSV Jî ice

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

Invoice can be created by typing at Log Out Welcome minds, creative Account -BC Vendor BC PORTAL least 3 characters of Create Invoice Purchase Orders Invoices Payments 8 a PO in search PO Search P.O Type at least 3 characters 156 Invoices Purch Payments Payments Purchase Orders Last 30 days ▼ entr Search: PDF CSV Show 10 PO TI PO Number Ordered Date PO Amount Amount I ed to Date Req for line items rv to re verfying \$0.00 PO561447 осто 6/5/2017 \$3,850.00 Create Invoice Requisition for contractors fy2016 More OCTO PO561403-V5 6/2/2017 \$3,850.00 \$860.44 Create Invoice

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.



button

elect Create Invoice

Purchase Orders tab on menu bar

from

- Enter the Purchase Order Number
- The "Create Invoice" form will be opened

c. Create invoice from the "Purchase Orders" tab

Welcome minds, creative Account Log Out **≛DC**^{Vendor} Home Create In Purchase O Payments 2 # Home / Purchase Orders Search Purchase Orders Purchase Order Number Invoice Number Agency 🕜 Ordered Date 😰 lect an age Last 30 Days ase Order Numbe Show PO's that are not fully invoiced 21 Show 10 • entries Search: D I≣h CSV PO Title PO # Order O Amount 💵 \$3,850.00 Req for line items rv to re verfying осто 6/5/2017 \$0.00 Create Invoice PO561403-V5 Requisition for contractors fy2016 осто 6/2/2017 \$3,850.00 \$860.44 +More Create Invoice req for line items rv to reduce PO561418 осто 6/2/2017 \$3,850.00 +More \$3,850.00 Fully in PO561371-V2 req for line items rv changing осто 6/1/2017 \$3,850.00 \$6,000.00 Fully invoiced PO561566-V4 6/23/2017 Requisition with 2 line items price +More осто \$4,000.00 \$2,000.00 Create Invoice

- 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.

Home / Create Invoice	eate Invoice Purchase Orders	Invoices Payments		e
reate Invoice			Cancel Sub	mit * Require
Vendor Invoice Number: * 👔		Purchase Order Number:	PO561447	
Contract Number:	56789	PO Amount:	\$3,850.00	
Invoice Create Date:	6/30/2017	Amount Invoiced to Date:	\$0.00	
DC POC Email: 👔	@dc.gov only	Amount Remaining to Invoice:	\$3,850.00	
Tracking Number: 🕡		Invoice Status:	Open	
Payment Note: 🕡		Packing Slip ID: 👔		
Ship Date: 👔				
Ship Date: 🕡 Shipping Documents: (Max: 1	GB) 🝞	Additional Attachments: (Max: 1G	B) 🝞	_
	GB) 👔		B) 🕡	2
Shipping Documents: (Max: 1		Additional Attachments: (Max: 1G	B) 1	2
Shipping Documents: (Max: 1 File(s) to upload		Additional Attachments: (Max: 1G	B) 1	1
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose		Additional Attachments: (Max: 1G	B) 7	Line Total
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items	en t/Description	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen	+ Price	Line Total \$0.00
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Jne # PO Line Reference Par 1 Line	en t/Description 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen Quantity (Unit)	+ Price \$500.00	
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Jne # PO Line Reference Par 1 Line	en t/Description 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen Quantity (Unit) 0 of 10	+ E Price \$500.00 \$1,000.00	\$0.00
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Jne # PO Line Reference Par 1 Line	en t/Description 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen Quantity (Unit) 0 of 10	+ E Price \$500.00 \$1,000.00	\$0.00 \$0.00
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Line # PO Line Reference Par 1 Line 2 2 Line Items	en t/Description 2 2 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen	+ E Price \$500.00 \$1,000.00	\$0.00 \$0.00
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Line # PO Line Reference Par 1 Line 2 2 Line Remit To	en t/Description 2 2 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen Quantity (Unit) 0 of 10 0 of 10	+ E Price \$500.00 \$1,000.00	\$0.00 \$0.00
Shipping Documents: (Max: 1 File(s) to upload Choose File No file chose Line Items Ine # PO Line Reference Par 1 line 2 2 line Remit To Supplier Name:	en t/Description 2 2 2 2	Additional Attachments: (Max: 1G File(s) to upload Choose File No file chosen Quantity (Unit) 0 of 10 0 of 10	+ E Price \$500.00 \$1,000.00	\$0.00 \$0.00

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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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.

DCPOR	TAL Home Ci	reate Invoice	Purchase Orders	Invoices Paymer	nts	Welcome minds, creative Act	count 👻 Log Ou
🖀 Home /	Invoices						
Search In	voices						
Purcha	se Order Number	In	voice Number	Age	ency 🕜	Invoice Create Date 💽	
Purch	nase Order Number		Invoice Number	S	elect an agency	✓ Last 30 Days	•
Show 10		PO # 11	Create Date	Invoice Amount	Invoice Status	Search: If DC Comments If	Action
		PO # 1 PO561435- V3			Invoice Status In Review		
Agency	lî Invoice # 🛛 🖡	PO561435-	6/26/2017		In Review		Action 1
Agency OCTO	It Invoice # IF VIN6549	PO561435- V3 PO561403- V5	6/26/2017	\$10,390.11	In Review In Review		Action Copy
Agency OCTO OCTO	VIN6549 VIN3435	PO561435- V3 PO561403- V5 PO561565	6/26/2017	\$10,390.11 \$200.00	In Review In Review In Review		Action Copy



The following screen appears when the user selects the edit button.

				ount 👻 Log
UPORTAL Home Creat	e Invoice Purchase Orders Invoices	Payments		
ome / Create Invoice				
ate Invoice			Cancel	Submit * Requ
A new version of this invoice will	l be created.			
Vendor Invoice Number: * 🕐	inv to rej and verfysurv-V3	Purchase Order Number:	PO561584-V3	
Contract Number:	cz45678	PO Amount:	\$10,500.00	
Invoice Create Date:	7/5/2017	Amount Invoiced to Date:	\$10,500.00	
DC POC Email: 🕧	@dc.gov only	Amount Remaining to Invoice:	\$0.00	
Tracking Number: 🕡		Invoice Status:	Open	
Payment Note: 🕐		Packing Slip ID: 🕧		
Ship Date: 😰				
Shipping Documents: (Max: 1GB	3) 7	Additional Attachments: (Max: 10	6B) 🕜	
File(s) to upload	•	File(s) to upload		+
Choose File No file chosen	•	Choose File No file chosen		•
Choose File No file chosen • New files have to be uploaded		Choose File No file chosen		•
• New files have to be uploaded		Choose File No file chosen		
New files have to be uploaded ine Items PO Line Reference Part/I	d again to this version. Description	Choose File No file chosen Quantity (Unit)	Price	Line Tr
• New files have to be uploaded	d again to this version. Description		£1,000,00	E Line Tr
New files have to be uploaded ine Items te # PO Line Reference Part/I	d again to this version. Description	Quantity (Unit)	2 \$1,000.00	
New files have to be uploaded ine Items te # PO Line Reference Part/I	d again to this version. Description	Quantity (Unit)	2 \$1,000.00	\$0
New files have to be uploaded ine Items PO Line Reference Part/I 2 line 2 Remit To upplier Name:	d again to this version. Description	Quantity (Unit)	2 \$1,000.00	\$0
New files have to be uploaded ine Items PO Line Reference Part/I 2 line 2 Remit To upplier Name: reative minds rv	d again to this version. Description	Quantity (Unit) 0 of : Comments	2 \$1,000.00	\$0
New files have to be uploaded ine Items PO Line Reference Part/I 2 line 2 Remit To upplier Name:	d again to this version. Description	Quantity (Unit) 0 of : Comments	2 \$1,000.00	\$0
New files have to be uploaded New files have to be uploaded Remit To Upplier Name: reative minds rv Upplier Address: yz	d again to this version. Description	Quantity (Unit) 0 of : Comments	2 \$1,000.00	\$0

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

Solution 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.



DCPORT		eate Invoice	Purchase Ord	ders	Invoices Paym	ents	Welco	me minds, creative	Account 🗸	Log O
Home / I	nvoices									
earch Inv	oices									
Purchase	e Order Number	Ir	voice Number		A	gency 🕜		Invoice Create Da	te 🕐	
Purcha	ase Order Number		Invoice Number	r		Select an agency	Ψ.	Last 30 Days		•
Show 10 Agency 1	entries Invoice #	PO#	Create Date	ţ,	Invoice Amount	1 Invoice Status	Searc			Action
осто	INV55434	PO561481- V2	7/5/2017		\$3,463.	37 Pending				Сору
осто	inv 2	PO561595	7/5/2017		\$6,500.0	00 In Review				Сору
OCTO	inv 1 rv	PO561595	7/3/2017		\$7,500.0	00 In Review				Сору
OCTO	PO561505-V2 inv 1	PO561505- V2	7/3/2017		\$10,000.0	00 In Review				Сору
осто	inv sb2	PO561584-	7/3/2017		\$407.	72 In Review				Сору



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 (<u>www.vendorportal.dc.gov</u>)

Supported Browsers

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

Procedure Steps

- In a browser, open <u>www.vendorportal.dc.gov</u>
- 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



• Vendors can search payments by the following fields: Purchase Order Number, Invoice Number, ACH/Check #, Voucher Number or Payment Date.



🖀 Home 🕖 F	Payments							
Search Pa	yments							
Purchas	e Order Number	r .	Invoice Numb	er	ACH/Check #		Voucher Number	
Purcha	ase Order Numb	er	Invoice Nun	nber	Check Number		Voucher Number	
Paymen	t Date 🕐							
Last 3	80 Days	\sim						
Last 3	30 Days	~			🕫 Reset 🛛 Q Se			
Last 3 Show 10	0 Days → entries	~			27 Reset Q Se		arch:	DPDF 클 CS
		V	11	Invoice Create Date		Sea	arch: Payment Amount	
Show 10	✓ entries			Invoice Create Date 6/21/2017		Sea		1 Action J
Show 10 Agency	<pre>v entries if PO # If</pre>	Invoice #	0-V2-1517032		JT Voucher #	Sea J₹ ACH/Check #	11 Payment Amount 1	Action 0 Details

• By selecting the Details button under Actions, vendor can view payment details as per screen below

🖀 Home / Pa	Payment Details		^	
Search Pay	Agency: OCTO	Invoice number: INVsaku dup inv-V2-1517095		
	Purchase Order number: PO561483-V2	Invoice create date: 6/26/2017		
Purchase	Payment date: 6/26/2017	Voucher number: VOE71492		
Purchas	Payment Amount: \$4,039.32	ACH/Check Number: 65464		
Payment	Payment type: DIRECT DEPOSIT - CTX	Credited ACC number (Last 4 digits): 7465		
Last 30	Estimated payment date: 7/26/2017			
Show 10			DF PDF	∎ CSV
Agency			Action	11
			-	
осто			CLOSE	

- 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.
 - END OF DOCUMENT -