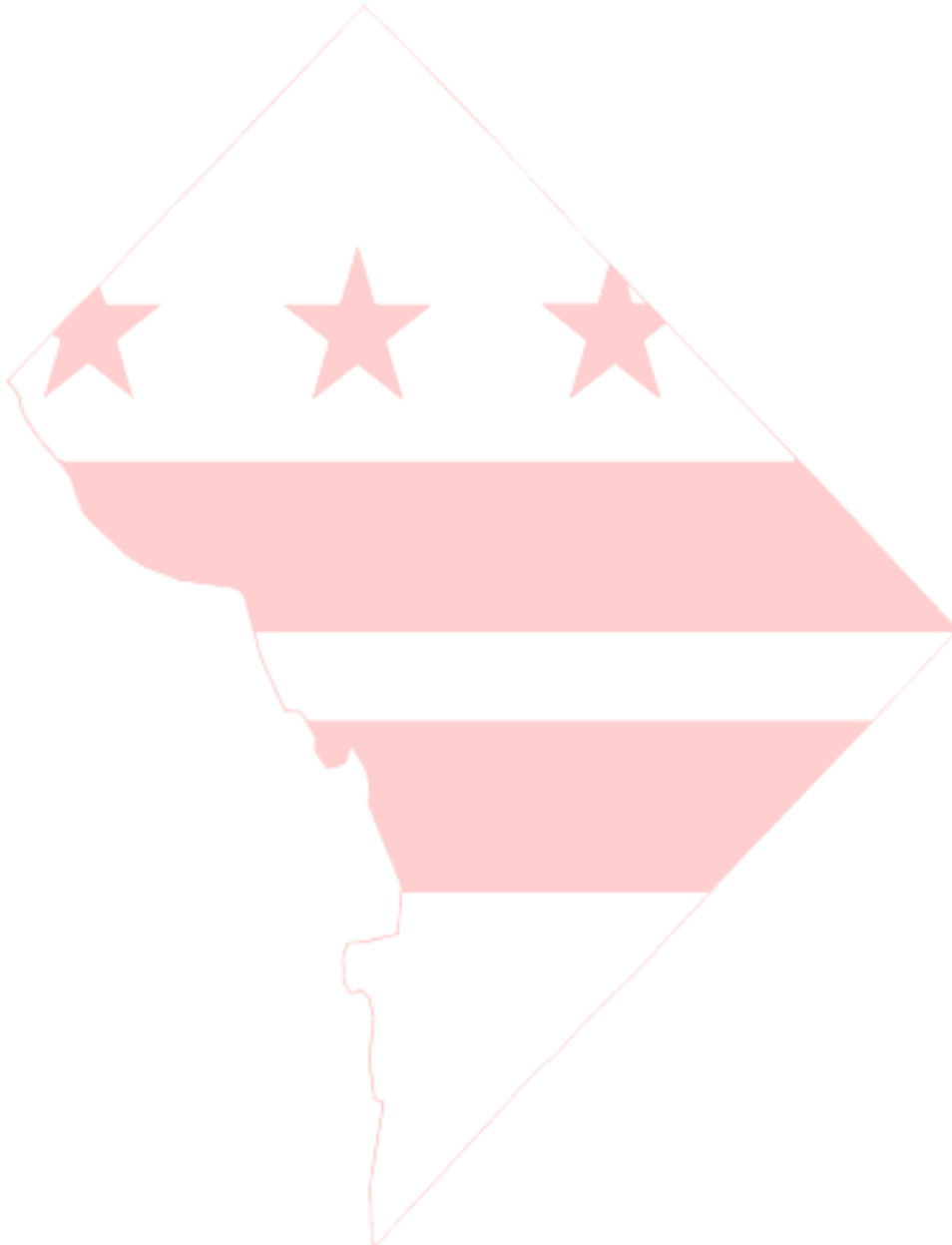


# Vendor Manual





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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 ( [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov) )

### Supported Browsers

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

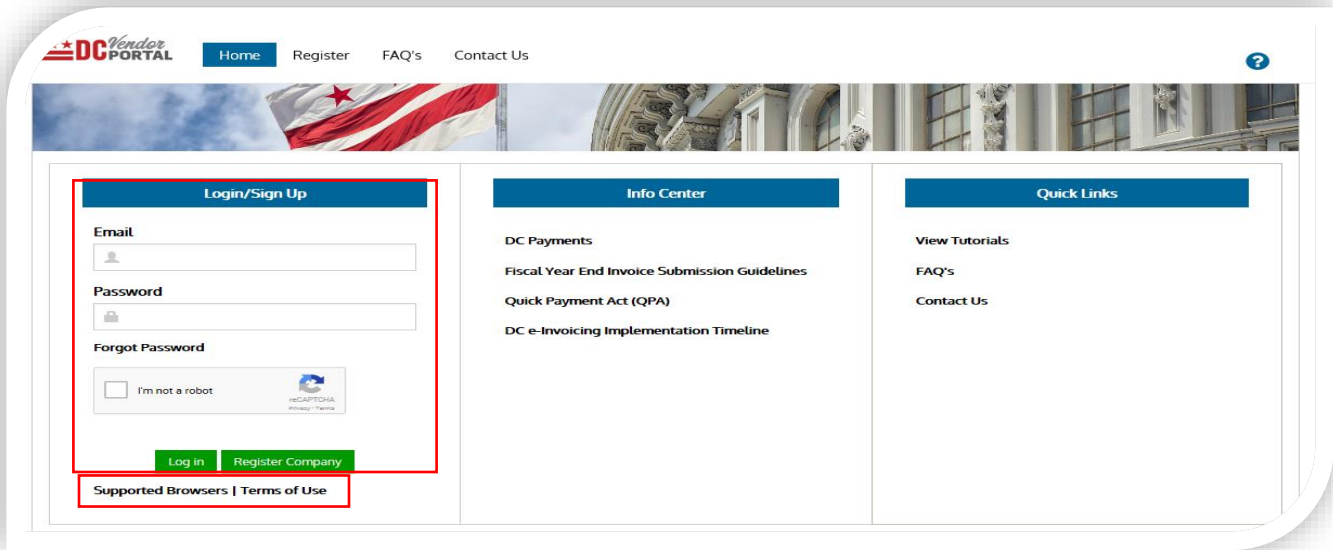
### Procedure Steps

In a browser, open [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov)

Home page is divided into 3 sections

#### a. Login/Sign up section

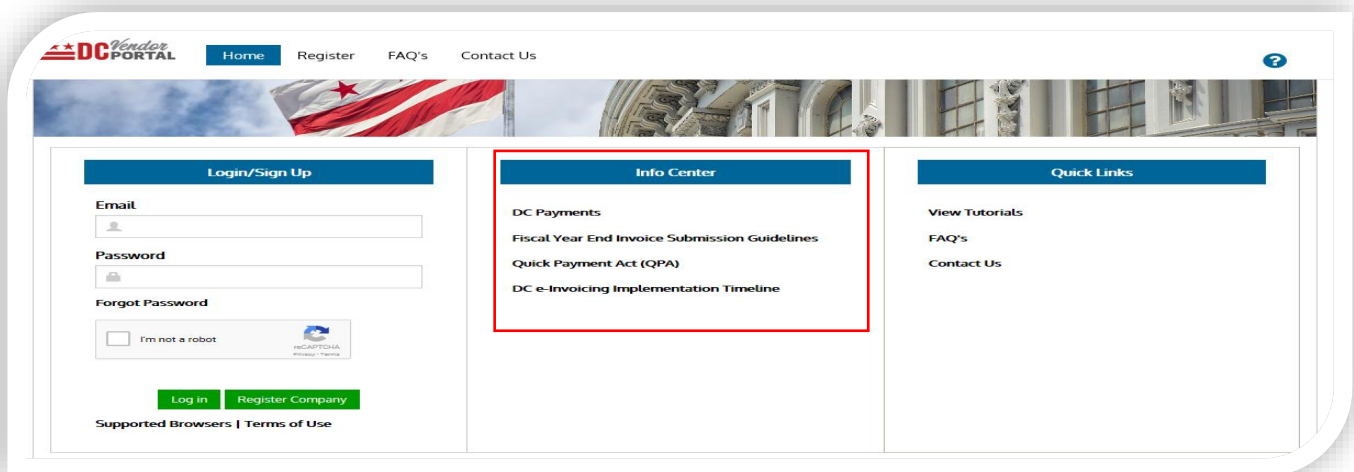
This section allows all registered vendors to use their login credentials to access the portal. New users can register by selecting “Register Company” button.



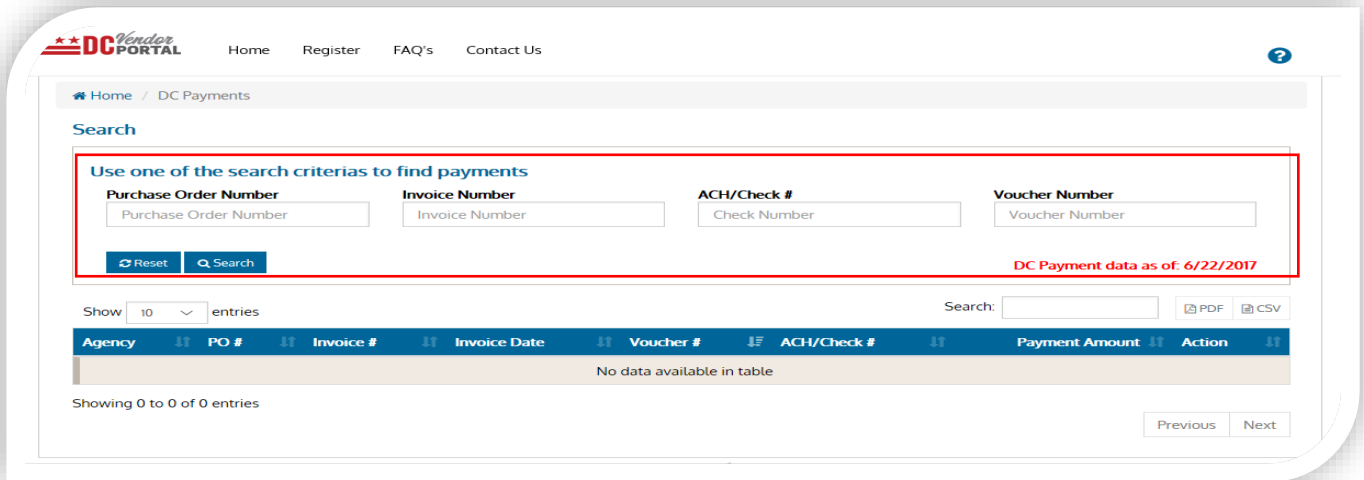
Note: The supported browsers and terms for use of the portal can be viewed by selecting the related button.

## 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.

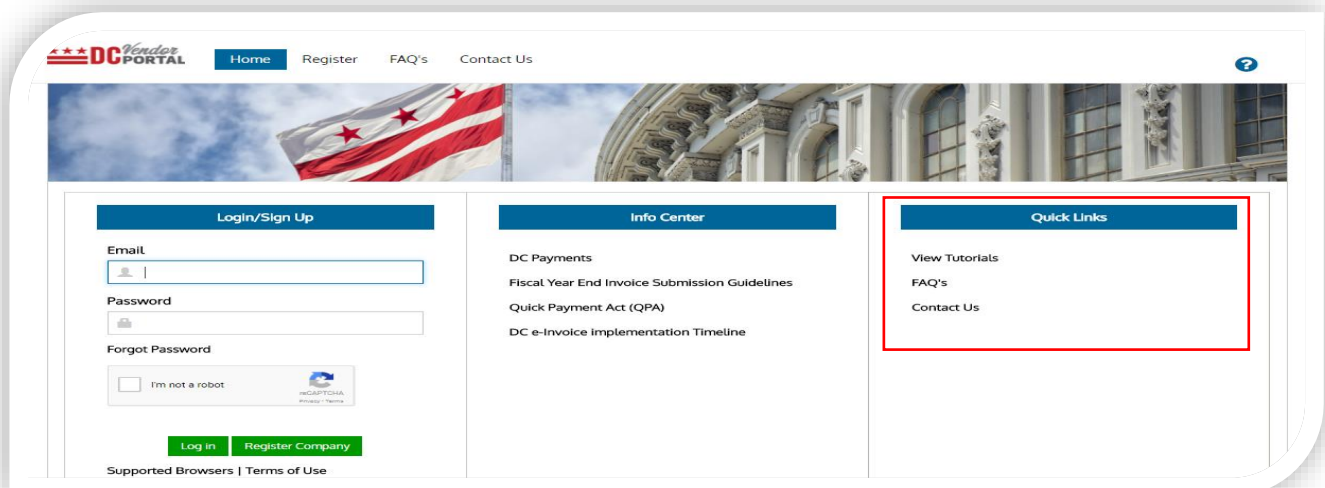


- Users may search by Purchase Order Number, Invoice Number, Check Number or Voucher Number.
- The Info center also provides fiscal year-end submission guidelines, link to Quick Payment Act (QPA) and other vendor communications.

### 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](http://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](http://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.”***

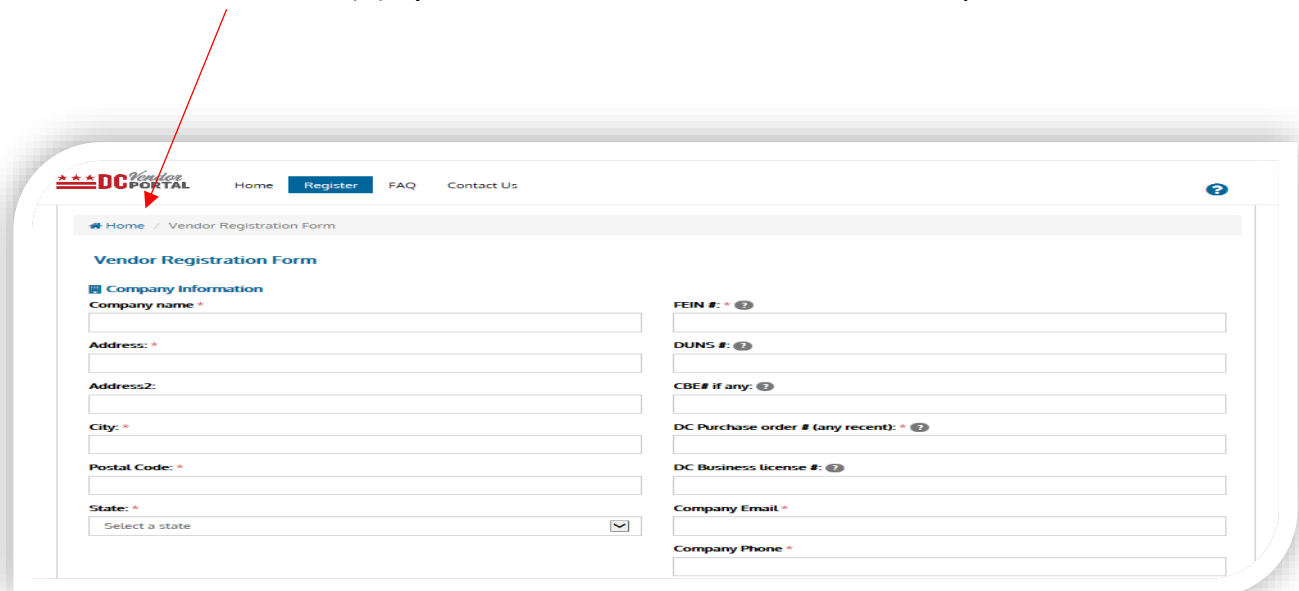
**Creating a user account on DC Vendor Portal is a free of cost service.**

**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).

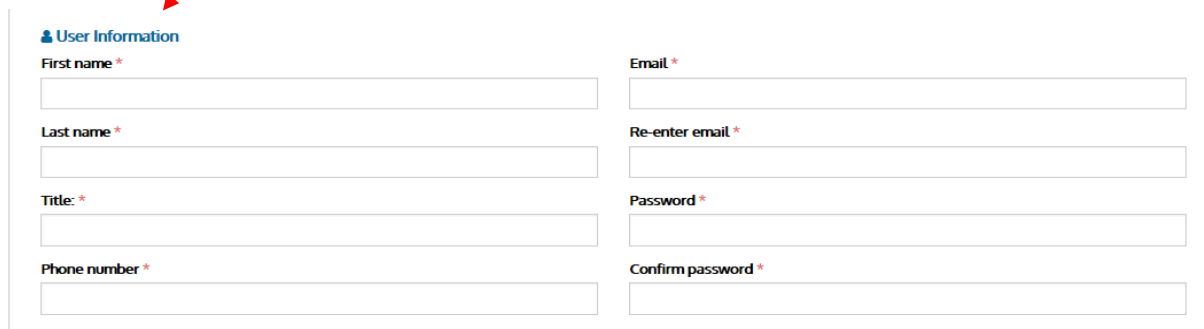
The vendor must also provide company email address and phone number. All required fields are marked with asterisk (\*) symbol next to the field must be completed.



The screenshot shows the 'Vendor Registration Form' on the DC Vendor Portal. The form is divided into two columns. The left column contains fields for 'Company name', 'Address', 'Address2', 'City', 'Postal Code', and 'State' (with a dropdown menu). The right column contains fields for 'FEIN #', 'DUNS #', 'CBE# if any', 'DC Purchase order # (any recent)', 'DC Business license #', 'Company Email', and 'Company Phone'. All required fields are marked with an asterisk (\*). The 'Register' button in the top navigation bar is highlighted with a red arrow.

## 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.

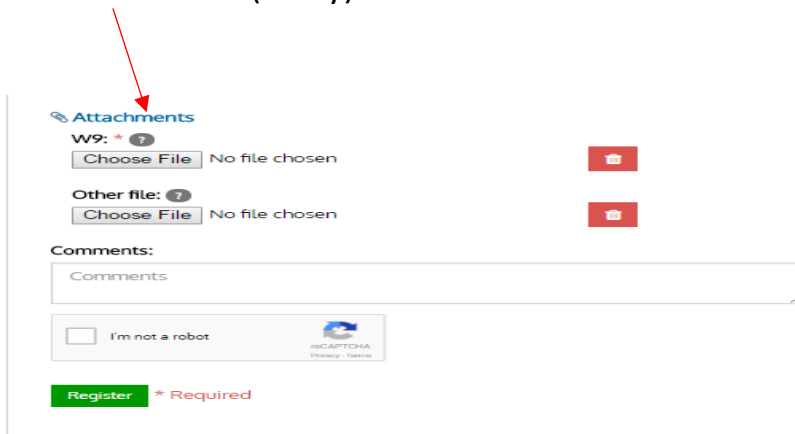


The screenshot shows a form titled "User Information" with a blue header and a person icon. The form contains the following fields:

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

## c. Attachments

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



The screenshot shows a form titled "Attachments" with a blue header and a document icon. The form contains the following fields:

- W9: \* (with a question mark icon) - Choose File button, No file chosen, and a trash icon.
- Other file: (with a question mark icon) - Choose File button, No file chosen, and a trash icon.
- Comments: A text area for entering comments.
- I'm not a robot: A checkbox and a CAPTCHA image.
- Register \* Required: A green button.

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

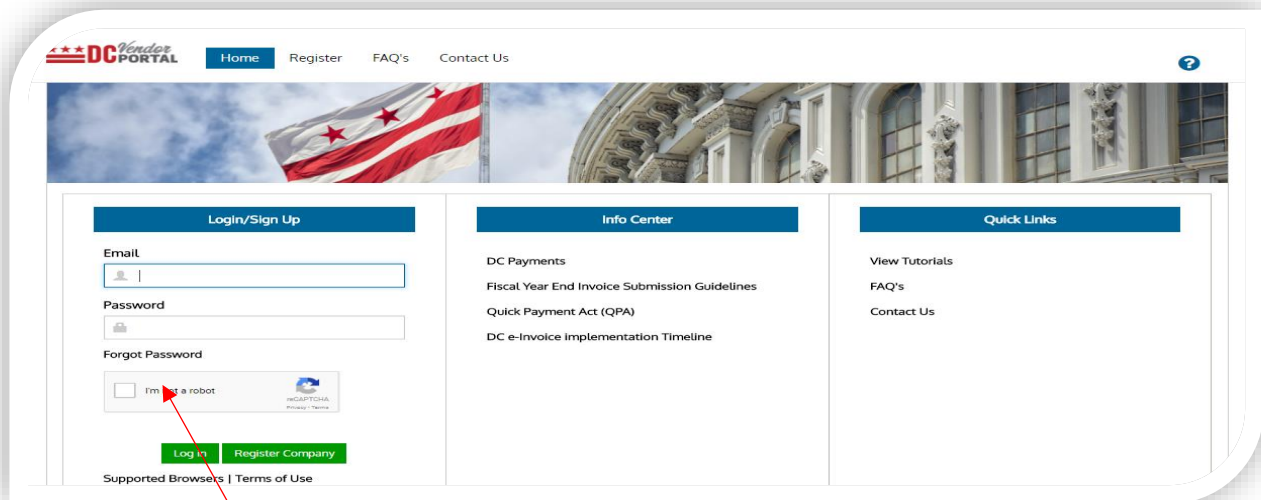
DC Vendor Portal ( [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov) )

### Browsers Supported

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

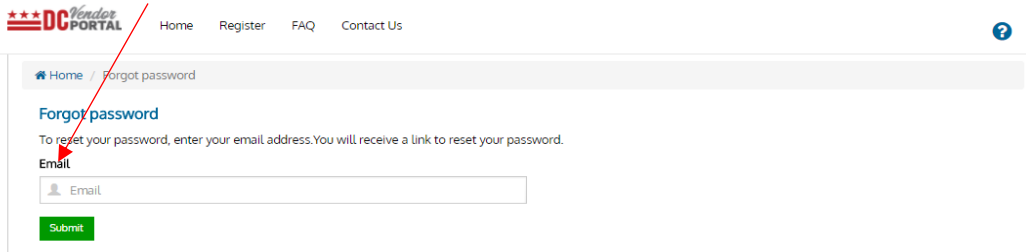
### Procedure Steps

In a browser, open [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov)

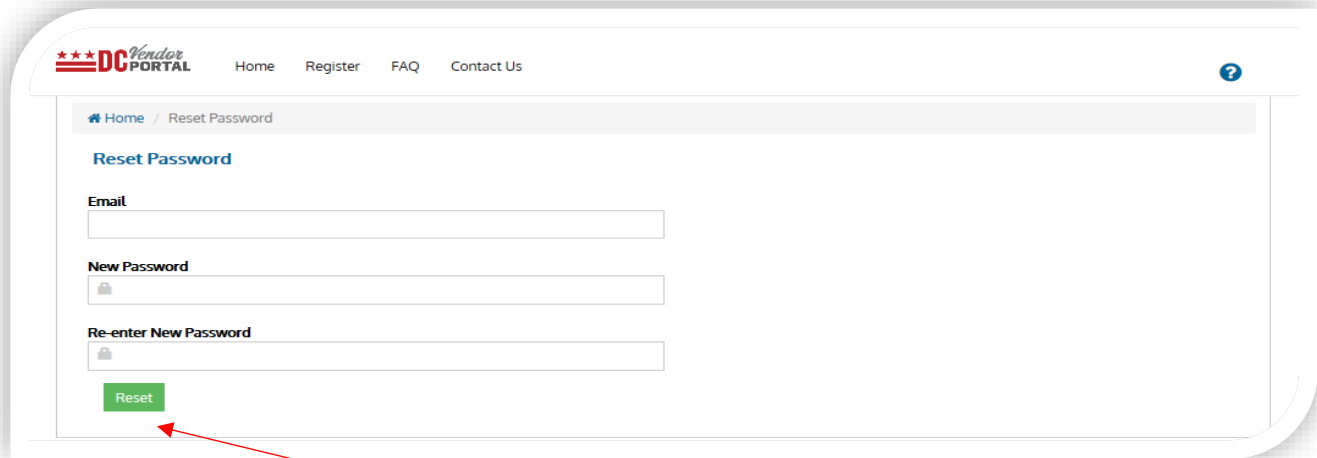


- Select “Forgot Password” link

- 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

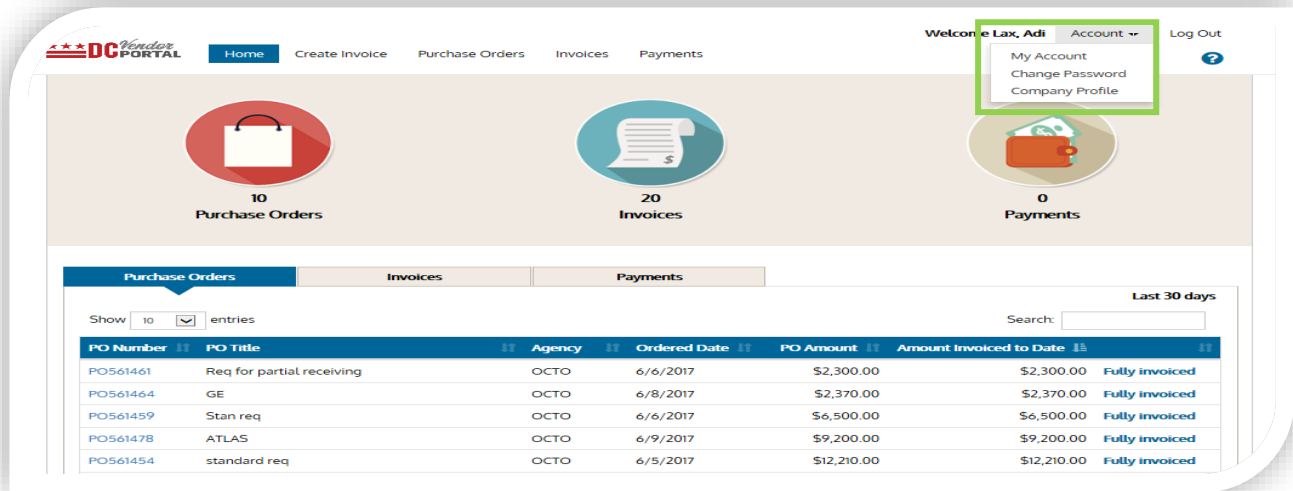
DC Vendor Portal ( [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov) )

### Browsers Compatible

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

### Procedure Steps

- In a browser, open [www.vendorportal.dc.gov](http://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:

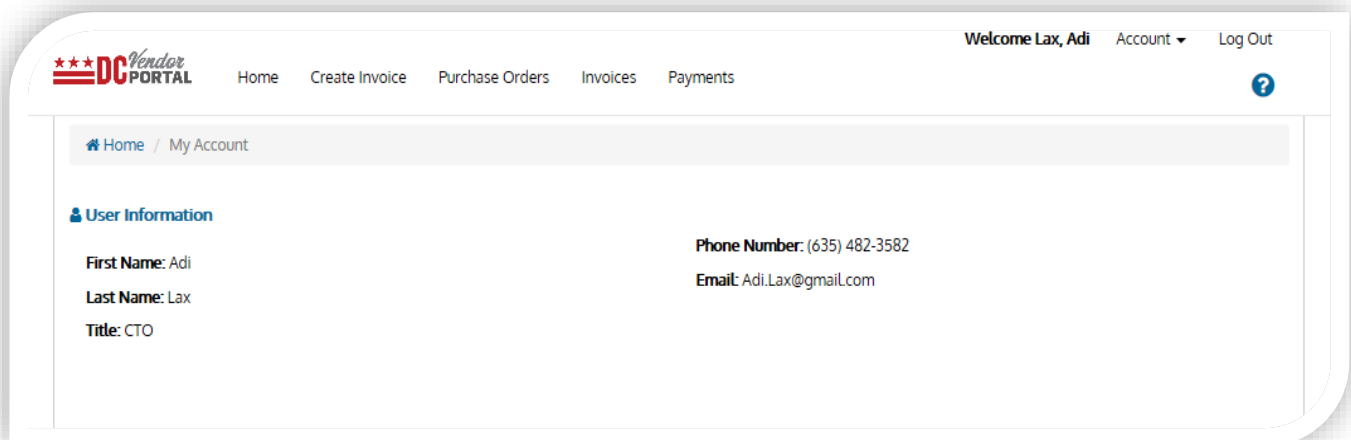
- a. My Account
- b. Change Password
- c. Company Profile



**Note: User information is view only**

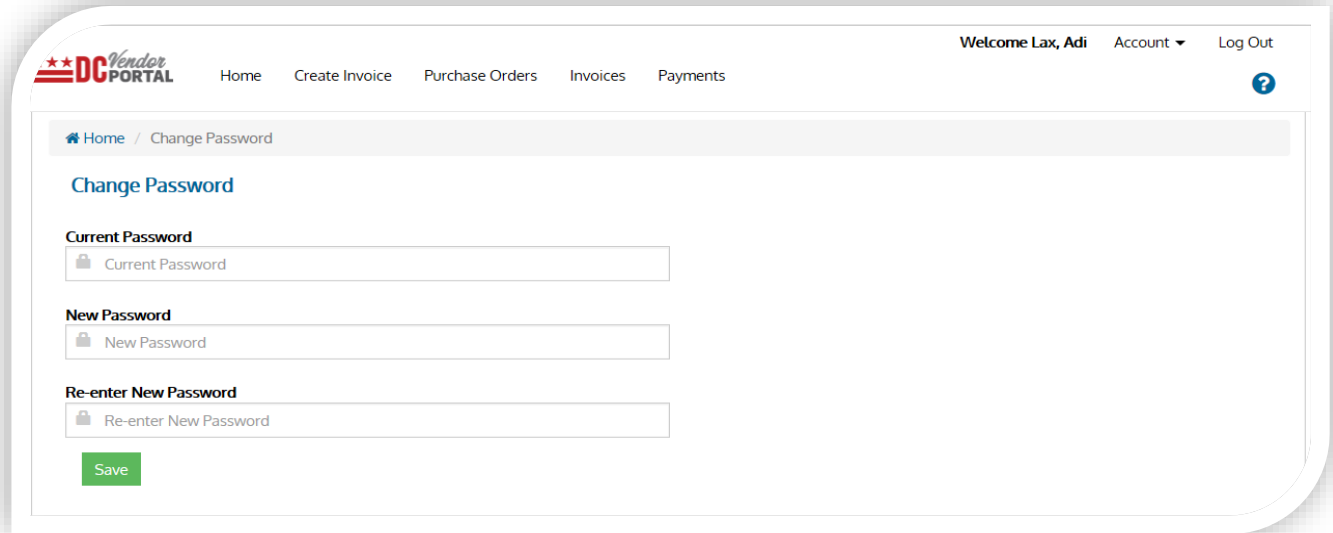
### a. My Account

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



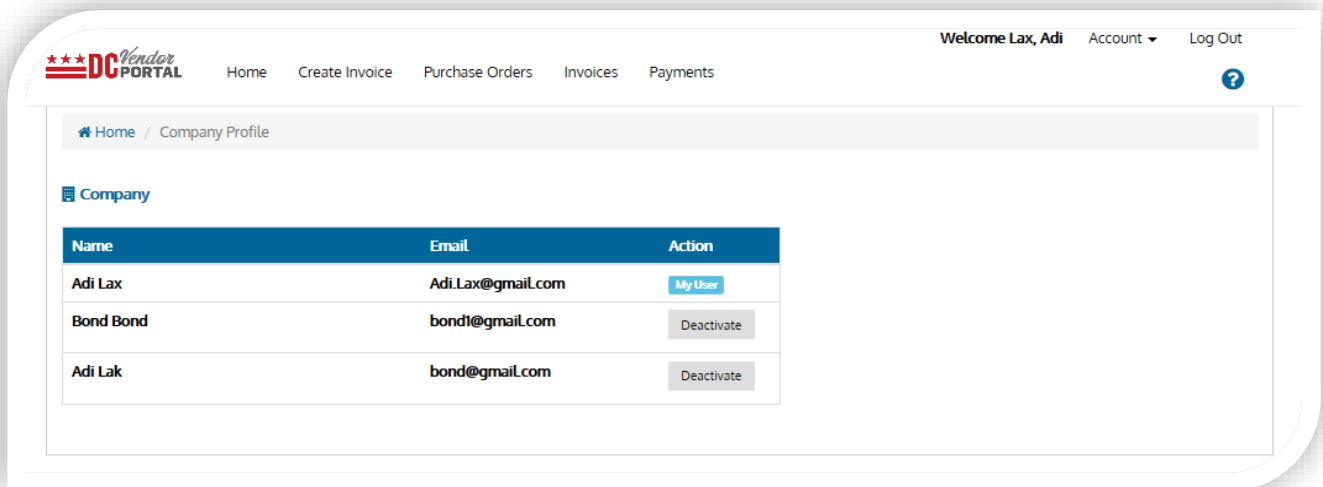
## b. Change Password

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



## c. Company Profile

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



## 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](http://www.vendorportal.dc.gov) )

#### Supported Browsers

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

### Procedure Steps

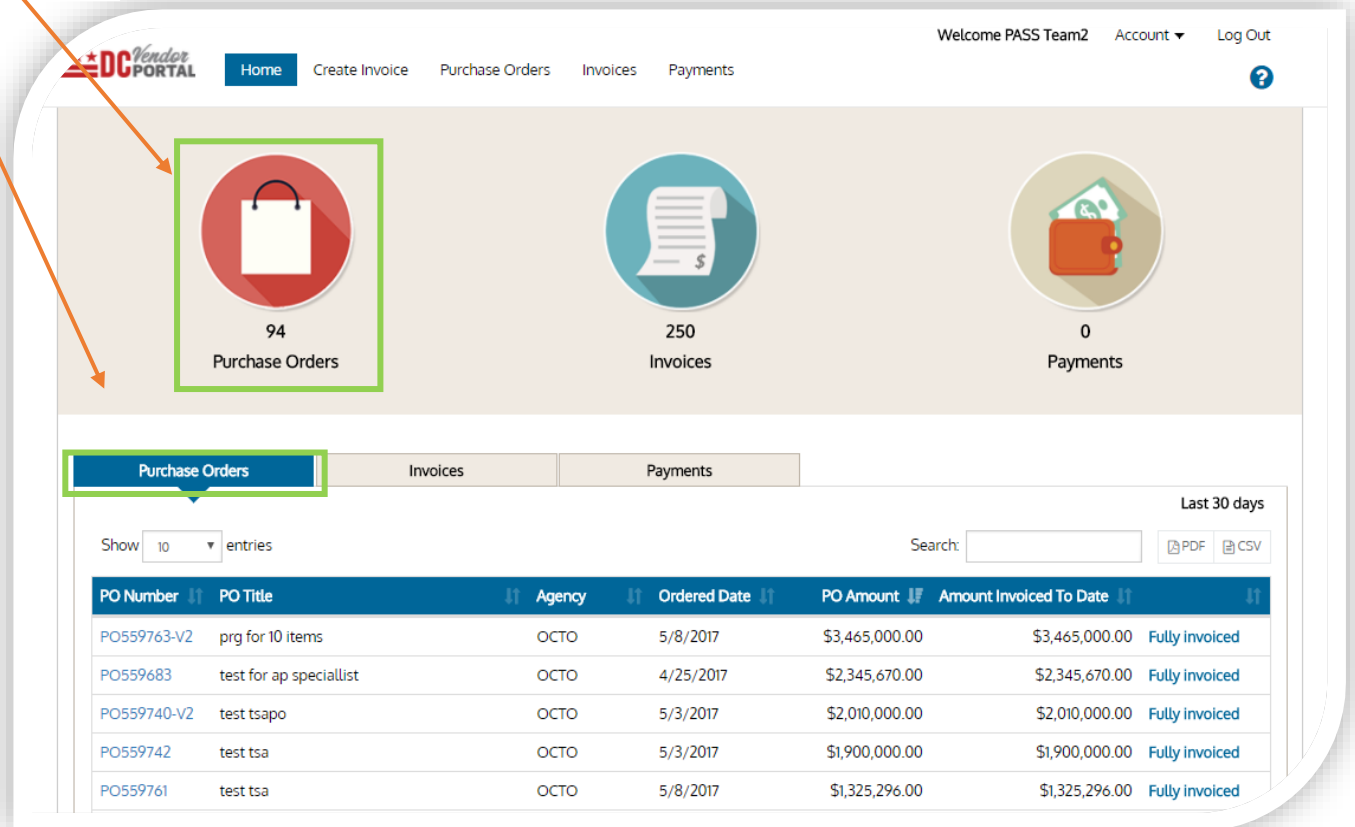
- In a browser, open [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov)
- Login from the home page of portal with user credentials

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

PO's can be found by clicking the select tab

## a. Purchase Orders button or Purchase Orders on the Dashboard

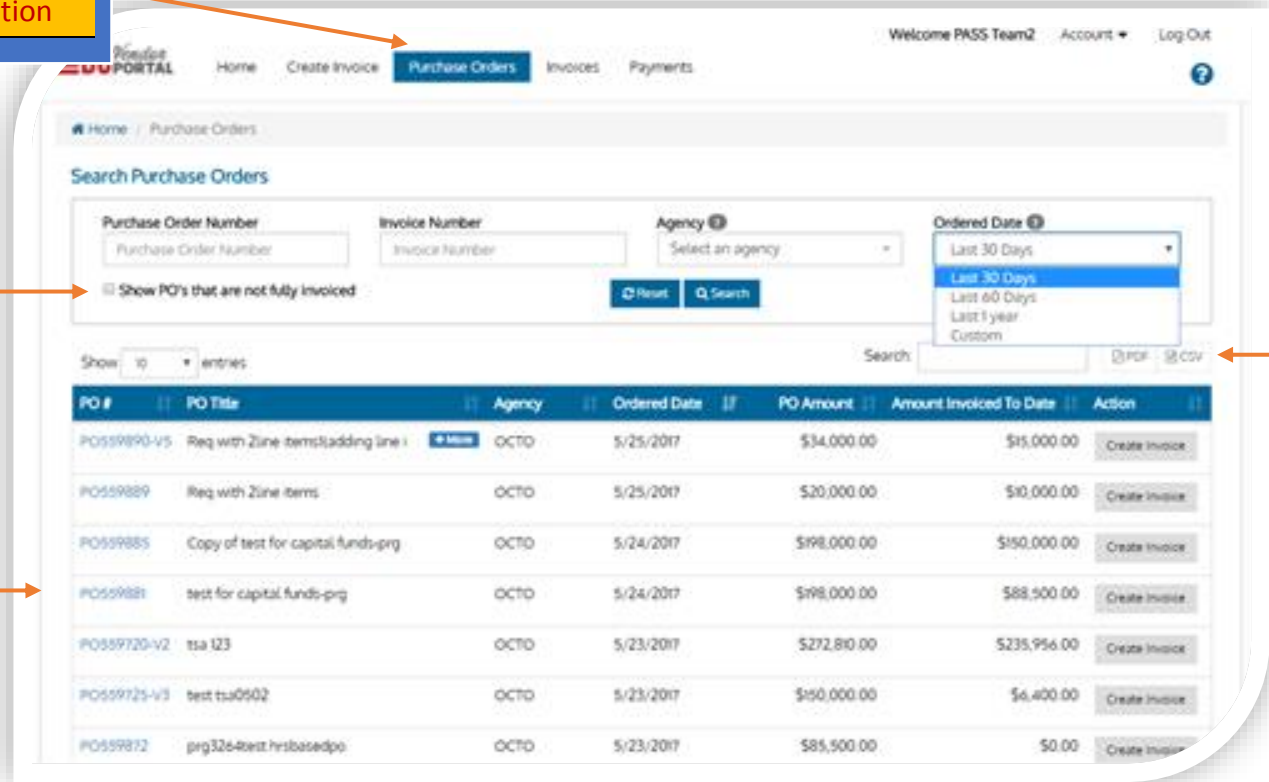


The screenshot shows the DC Vendor Portal dashboard. At the top, there is a navigation bar with the DC Vendor PORTAL logo, a 'Home' button, and links for 'Create Invoice', 'Purchase Orders', 'Invoices', and 'Payments'. The user is logged in as 'Welcome PASS Team2' with an 'Account' dropdown and a 'Log Out' link. The dashboard features three main cards: '94 Purchase Orders' (highlighted with a green box), '250 Invoices', and '0 Payments'. Below these cards is a tabbed interface with 'Purchase Orders', 'Invoices', and 'Payments' tabs. The 'Purchase Orders' tab is active and highlighted with a green box. The main content area shows a table of purchase orders with columns for PO Number, PO Title, Agency, Ordered Date, PO Amount, and Amount Invoiced To Date. The table lists five entries, all of which are 'Fully invoiced'. There are also search and filter options at the top right of the table area.

| PO Number   | PO Title               | Agency | Ordered Date | PO Amount      | Amount Invoiced To Date | Status         |
|-------------|------------------------|--------|--------------|----------------|-------------------------|----------------|
| PO559763-V2 | prg for 10 items       | OCTO   | 5/8/2017     | \$3,465,000.00 | \$3,465,000.00          | Fully invoiced |
| PO559683    | test for ap specialist | OCTO   | 4/25/2017    | \$2,345,670.00 | \$2,345,670.00          | Fully invoiced |
| PO559740-V2 | test tsapo             | OCTO   | 5/3/2017     | \$2,010,000.00 | \$2,010,000.00          | Fully invoiced |
| PO559742    | test tsa               | OCTO   | 5/3/2017     | \$1,900,000.00 | \$1,900,000.00          | Fully invoiced |
| PO559761    | test tsa               | OCTO   | 5/8/2017     | \$1,325,296.00 | \$1,325,296.00          | Fully invoiced |

**b. Purchase Order Tab on the Menu Bar**

Purchase Orders tab will open search option



- 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.

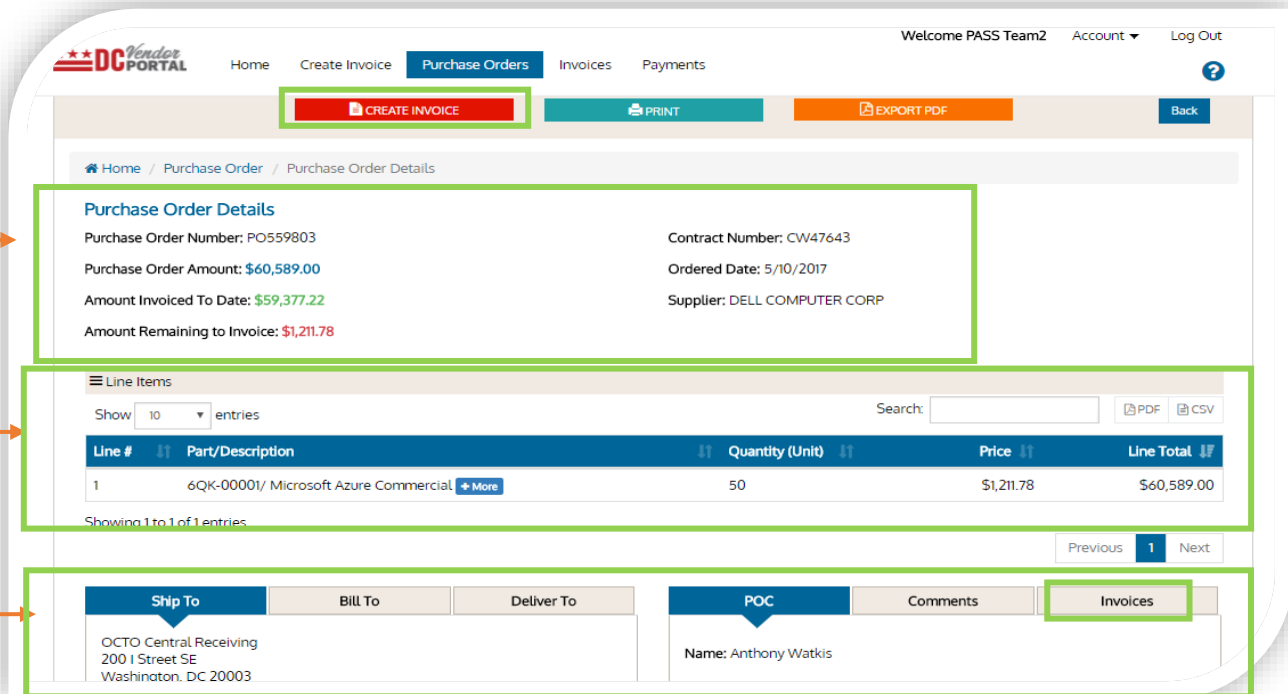
**Purchase Order Details**

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](http://www.vendorportal.dc.gov) )

#### Supported Browsers

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

### Procedure Steps

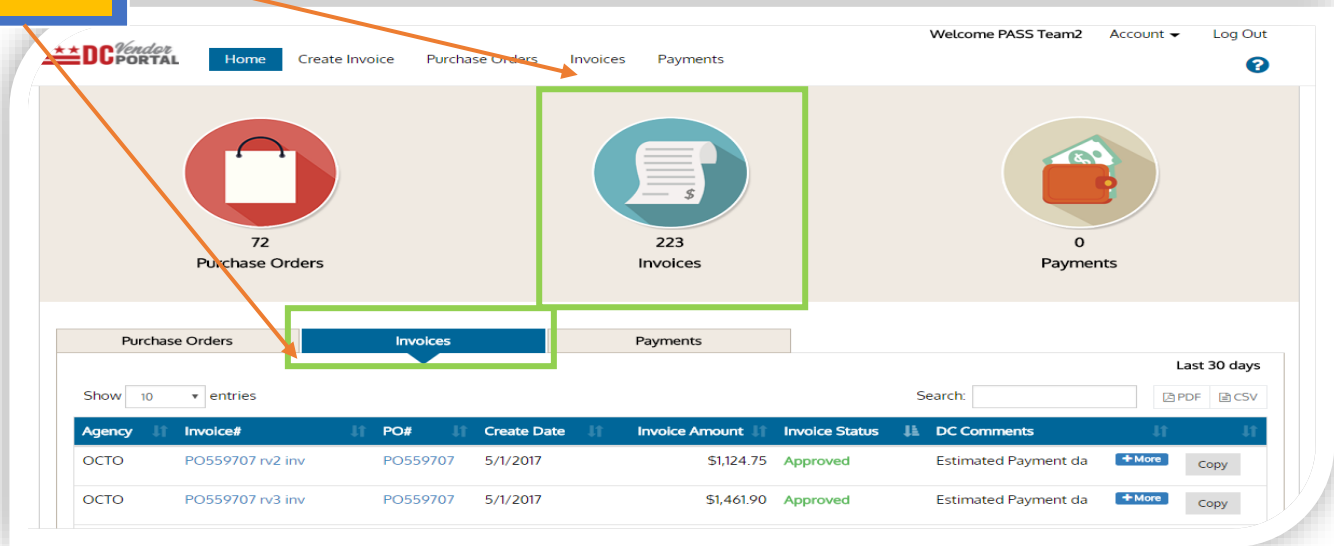
- In a browser, open [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov)
- Login from the home page of the portal with user credentials

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.

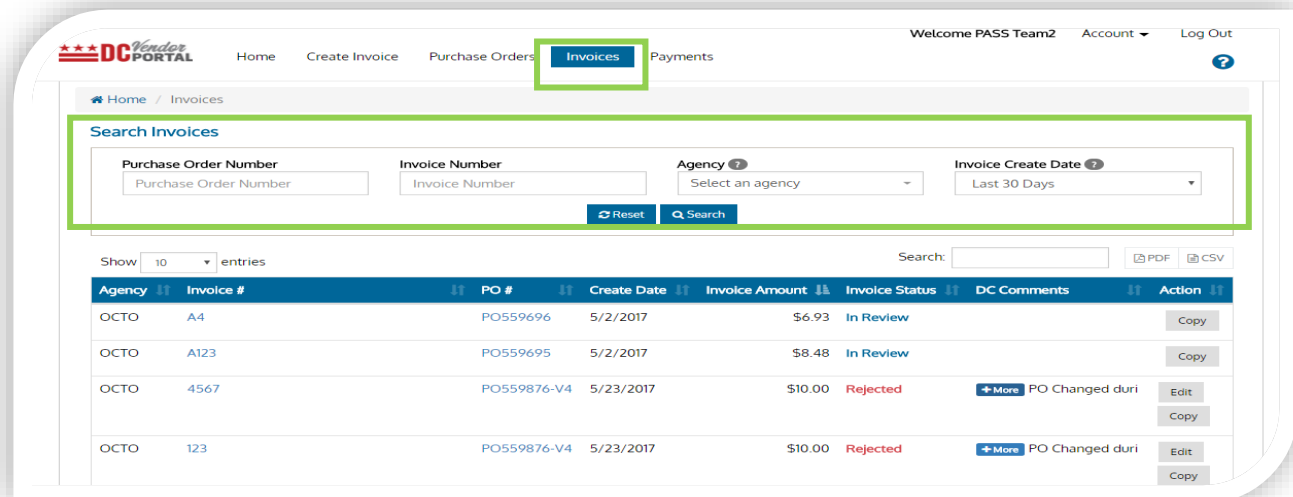
Invoices can be found by selecting any tab

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](http://www.vendorportal.dc.gov) )

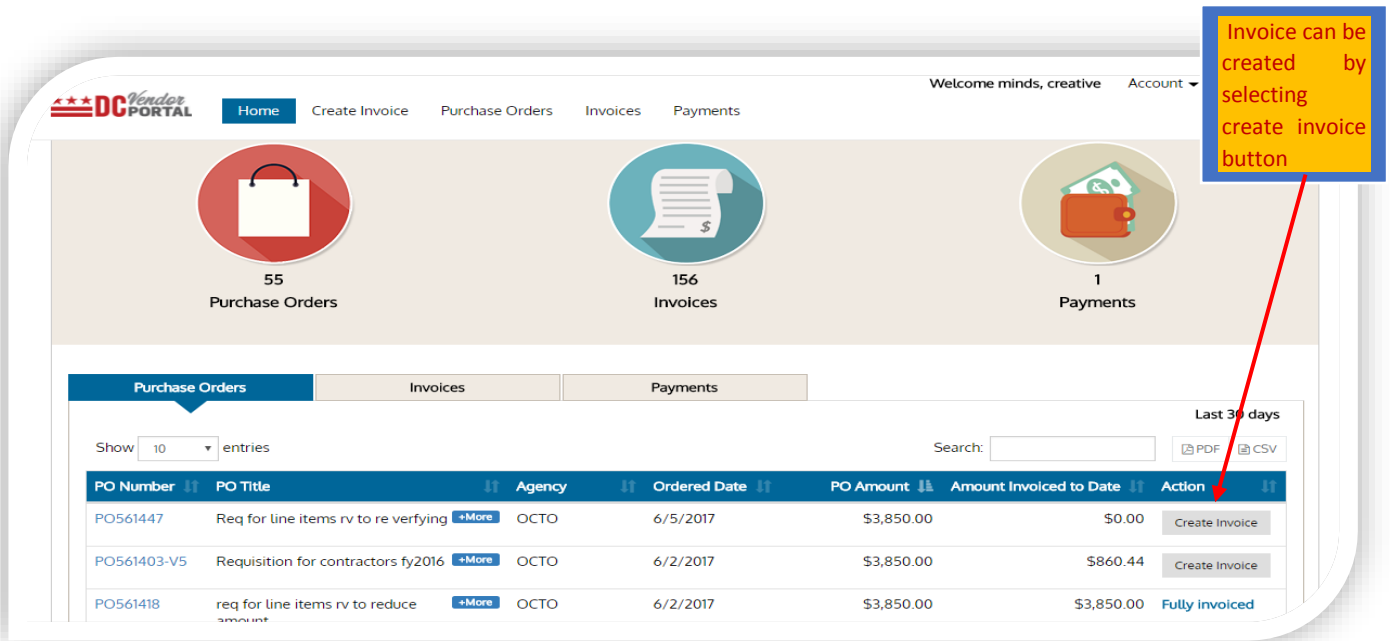
#### Supported Browsers

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

### Procedure Steps

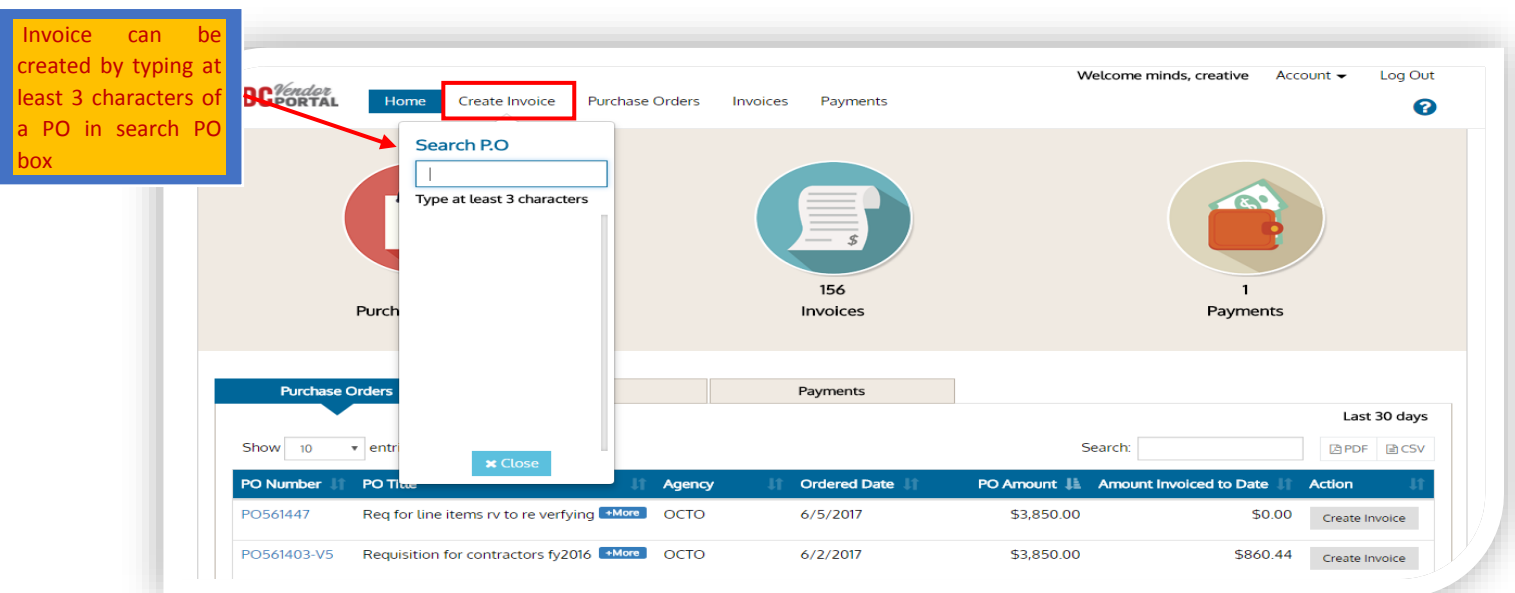
- In a browser, open [www.vendorportal.dc.gov](http://www.vendorportal.dc.gov)
- Login to the home page of portal with user credentials obtained from the
- vendor registration process
- Vendor can create an invoice
- Three ways to create an invoice. (A) from the home page, (B) from the “Create Invoice” 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

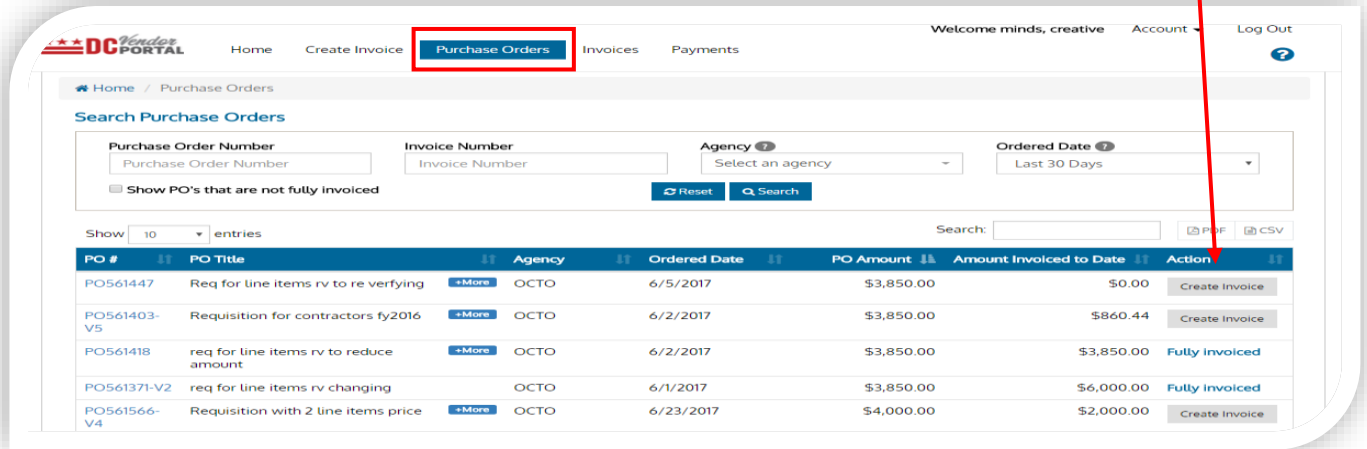


- Select the “Create Invoice” from the Menu bar
- The user will be prompted to enter the Purchase Order Number.

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

### c. Create invoice from the “Purchase Orders” tab

Select Create Invoice button from Purchase Orders tab on menu bar



- 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

## Create Invoice

Cancel Submit \* Required

|                                  |                                                                                                            |                              |                      |
|----------------------------------|------------------------------------------------------------------------------------------------------------|------------------------------|----------------------|
| Vendor Invoice Number: * ?       | <input type="text"/>                                                                                       | 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: ?                  | <input type="text" value="@dc.gov only"/>                                                                  | Amount Remaining to Invoice: | \$3,850.00           |
| Tracking Number: ?               | <input type="text"/>                                                                                       | Invoice Status:              | Open                 |
| Payment Note: ?                  | <input type="text"/>                                                                                       | Packing Slip ID: ?           | <input type="text"/> |
| Ship Date: ?                     | <input type="text"/>                                                                                       |                              |                      |
| Shipping Documents: (Max: 1GB) ? | <input type="button" value="File(s) to upload"/> <input type="button" value="Choose File"/> No file chosen |                              |                      |
|                                  | <input type="button" value="File(s) to upload"/> <input type="button" value="Choose File"/> No file chosen |                              |                      |

### Line Items

| Line # | PO Line Reference | Part/Description | Quantity (Unit)                      | Price      | Line Total |
|--------|-------------------|------------------|--------------------------------------|------------|------------|
| 1      | 1                 | line 2           | <input type="text" value="0"/> of 10 | \$500.00   | \$0.00     |
| 2      | 2                 | line 2           | <input type="text" value="0"/> of 10 | \$1,000.00 | \$0.00     |

Total amount: \$0.00

| Remit To                                                                                           | Bill To |
|----------------------------------------------------------------------------------------------------|---------|
| <p>Supplier Name:<br/>creative minds rv</p> <p>Supplier Address:<br/>xyz<br/>herndon, va 56789</p> |         |

| Comments                                                               |
|------------------------------------------------------------------------|
| <p>Comments</p> <p><input type="text"/></p> <p>255 characters left</p> |

Cancel Submit \* Required

## 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**

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**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](http://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](http://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 screenshot displays the 'Invoices' page in the DC Vendor Portal. At the top, there is a navigation bar with 'Home', 'Create Invoice', 'Purchase Orders', 'Invoices', and 'Payments'. A search filter section includes fields for 'Purchase Order Number', 'Invoice Number', 'Agency' (with a dropdown), and 'Invoice Create Date' (with a dropdown). Below the search filter, there is a table of invoice records. The table has columns for Agency, Invoice #, PO #, Create Date, Invoice Amount, Invoice Status, DC Comments, and Action. The 'Invoice Status' column is highlighted with a green box. The 'Action' column contains 'Copy' and 'Edit' buttons. The 'Edit' button for the 'Rejected' invoice is also highlighted with a green box.

| Agency | Invoice #         | PO #        | Create Date | Invoice Amount | Invoice Status | DC Comments                             | Action    |
|--------|-------------------|-------------|-------------|----------------|----------------|-----------------------------------------|-----------|
| OCTO   | VIN6549           | PO561435-V3 | 6/26/2017   | \$10,390.11    | In Review      |                                         | Copy      |
| OCTO   | VIN3435           | PO561403-V5 | 6/26/2017   | \$200.00       | In Review      |                                         | Copy      |
| OCTO   | split2chand rv-V3 | PO561565    | 6/22/2017   | \$700.62       | In Review      |                                         | Copy      |
| OCTO   | split 2 invprud   | PO561524    | 6/22/2017   | \$2,431.00     | Rejected       | rejecting second <a href="#">+More</a>  | Edit Copy |
| OCTO   | saku dup inv-V2   | PO561483-V2 | 6/26/2017   | \$4,039.32     | Approved       | Estimated Payment <a href="#">+More</a> | Copy      |

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.



Home / Invoices

### Search Invoices

|                                                                             |                                                               |                                                                      |                                                                               |
|-----------------------------------------------------------------------------|---------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Purchase Order Number<br><input type="text" value="Purchase Order Number"/> | Invoice Number<br><input type="text" value="Invoice Number"/> | Agency <sup>?</sup><br><input type="text" value="Select an agency"/> | Invoice Create Date <sup>?</sup><br><input type="text" value="Last 30 Days"/> |
| <input type="button" value="Reset"/>                                        |                                                               | <input type="button" value="Search"/>                                |                                                                               |

Show  entries

Search:

| Agency | Invoice #        | PO #        | Create Date | Invoice Amount | Invoice Status | DC Comments | Action                              |
|--------|------------------|-------------|-------------|----------------|----------------|-------------|-------------------------------------|
| OCTO   | INV55434         | PO561481-V2 | 7/5/2017    | \$3,463.37     | Pending        |             | <input type="button" value="Copy"/> |
| OCTO   | inv 2            | PO561595    | 7/5/2017    | \$6,500.00     | In Review      |             | <input type="button" value="Copy"/> |
| OCTO   | inv 1 rv         | PO561595    | 7/3/2017    | \$7,500.00     | In Review      |             | <input type="button" value="Copy"/> |
| OCTO   | PO561505-V2 inv1 | PO561505-V2 | 7/3/2017    | \$10,000.00    | In Review      |             | <input type="button" value="Copy"/> |
| OCTO   | inv sb2          | PO561584-V2 | 7/3/2017    | \$407.72       | In Review      |             | <input type="button" value="Copy"/> |

## 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](http://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](http://www.vendorportal.dc.gov)
- Login from the home page of the portal with user credentials

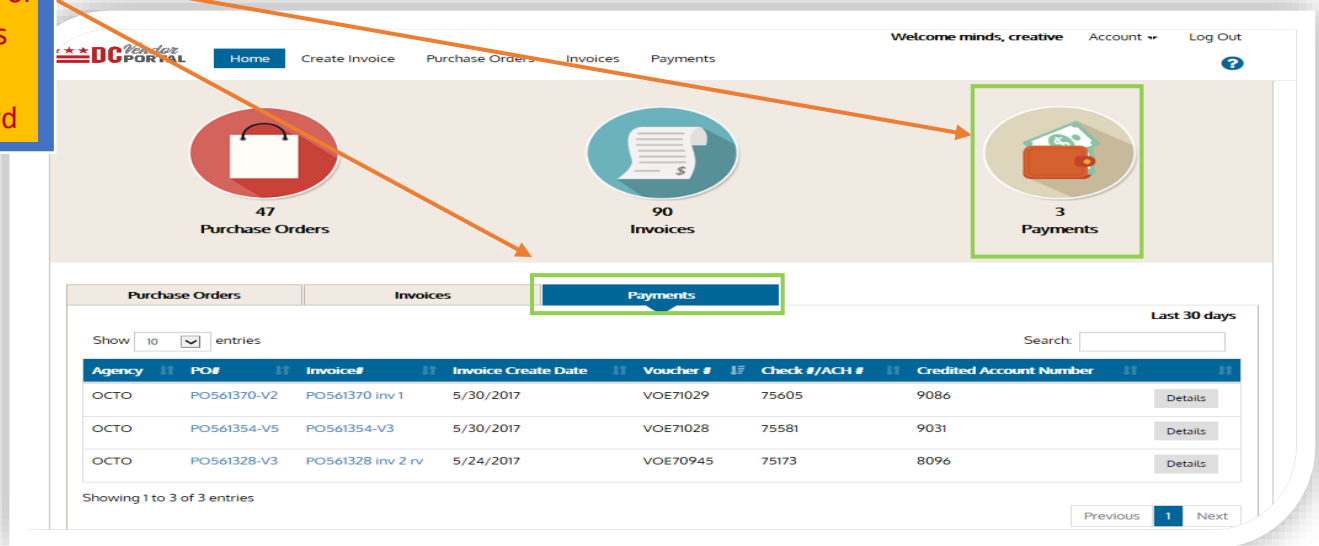
Vendors can view payments made in the last 30 days.

(a) by selecting the payments button or payments on dashboard, and

(b) by selecting the payments tab on the menu bar

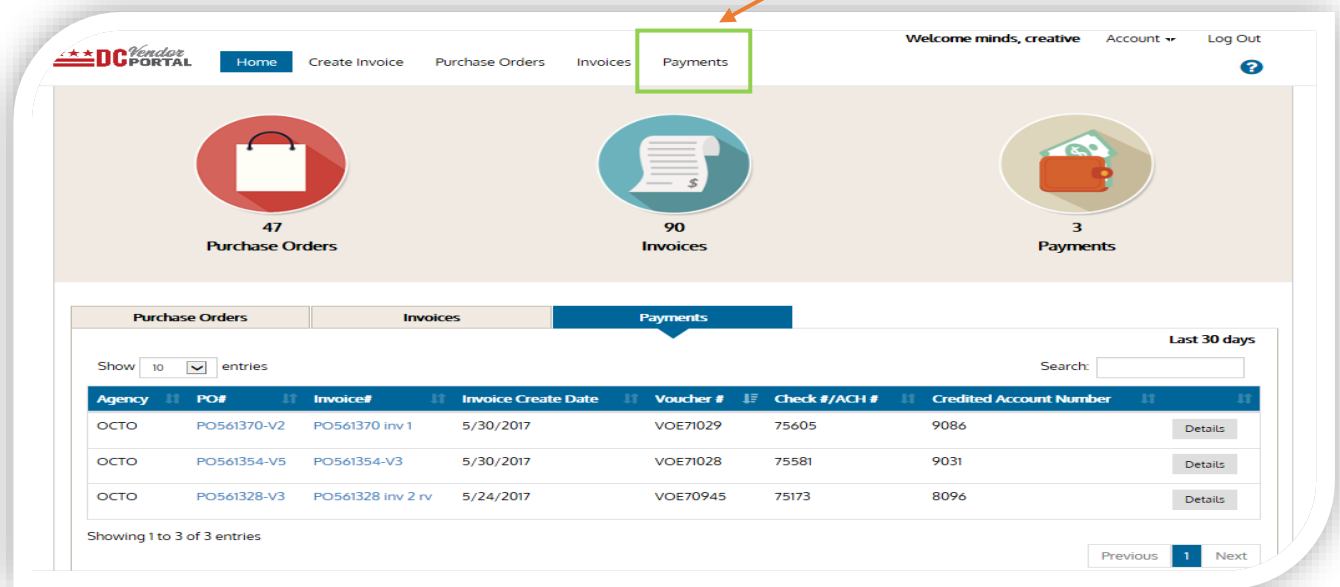
a. Payments button or Payments on the Dashboard

Payment button or payments on dashboard

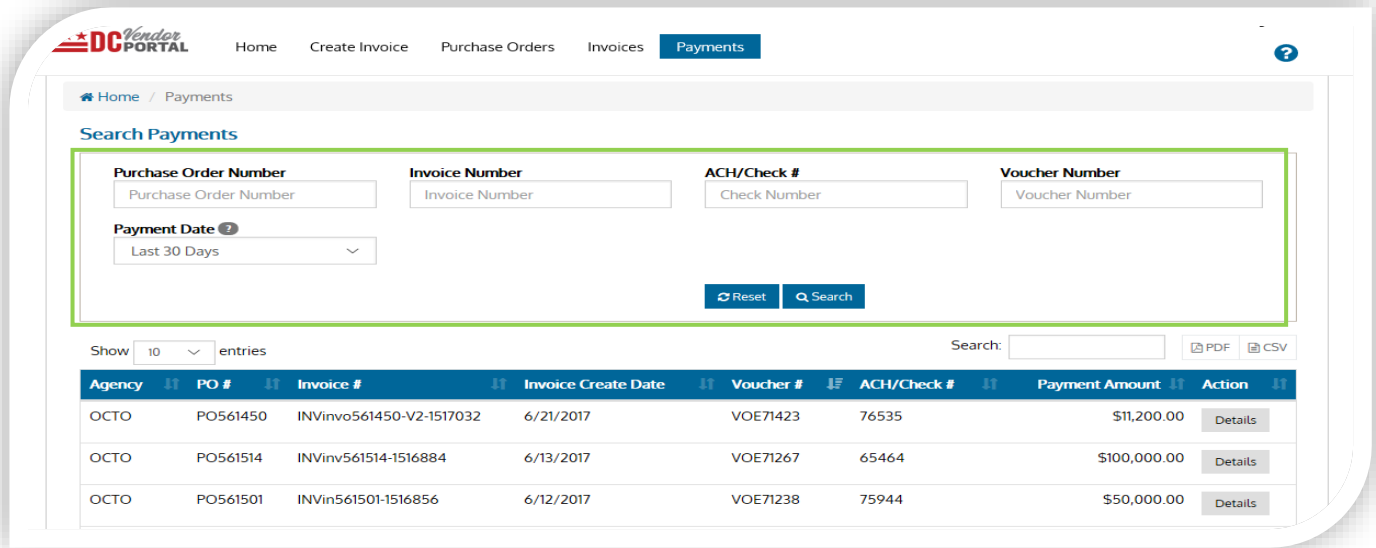


b. Payments tab on the Menu bar

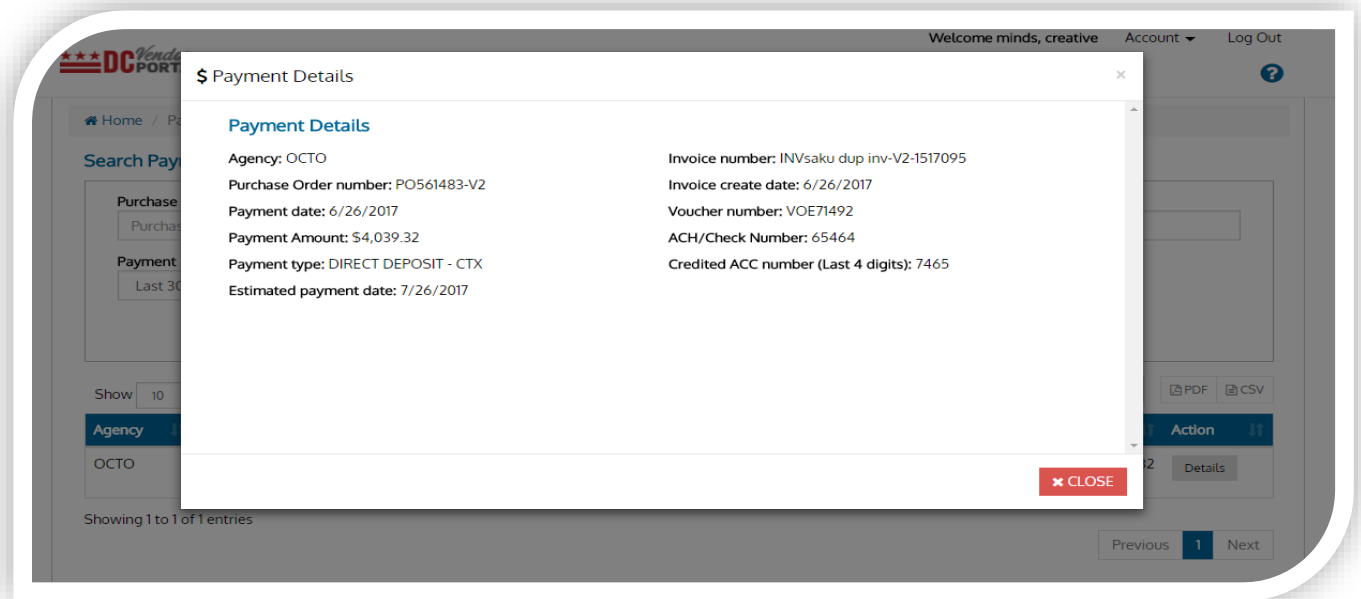
Payments tab from menu bar



- 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.