Web Portal Vendor Entry & New Vendor Request

Suggested Resource:

- Mobile App Vendor Entry & New Vendor Request – Quick Reference

Vendor Entry – Web Portal

1. Log in to the DCI Web Portal
2. Click **Employer** on the main menu
3. Select **Vendors** on the submenu
4. Type and select the Vendor Name in the filter
5. Click the blue **Search** button
6. **Click anywhere in the vendor row** to open the details page
7. On the Vendor Details page, click **Actions**.
8. Select **New Vendor Payment Entry** from the drop-down menu
9. Complete the **Add New Vendor Payment Entry** form wizard
    a. Entry Type: Auto-populates
    b. Account Type: Select **Hourly**
    c. Client: Type and select the **client**
    d. Service Code: Select **service code** from the drop-down
        1. If the appropriate code is not available in the drop-down menu, please contact your local office or support coordinator.
    e. Dollar Amount: Enter the **total amount** for the invoice for all dates of service
    f. Invoice Number: Enter the **invoice number** *along with the client's name*
    g. Vendor Payment Reference fields 1-5: Optionally add any additional information regarding the vendor payment
    h. Date(s) of Service: This may be one date or multiple dates. **Enter the date** and the **amount** for that date then click the blue **plus sign (+)** to add more as needed.
        1. **Please note:** The sum of the dates of service must match the dollar amount entered in the Dollar Amount field
    i. Notes (optional)
    j. Invoice Attachment: Click the **Choose Files** button. Attachment must be in PDF, JPG, or PNG format.
10. Click the blue **Save** button when all fields are complete
11. Click the blue **Yes** button to confirm

New Vendor Request – Web Portal

1. Log in to the DCI Web Portal
2. Click **Employer** on the main menu
3. Select **Vendors** on the submenu
4. Click **Actions**
5. Select **New Vendor Request** from the drop-down menu
6. Complete the **Add New Vendor Request** form wizard
    a. Vendor Name: Enter the name of the new vendor on the invoice along with the DBA Name (Doing Business As)
    b. Vendor Address: Enter the address of the new vendor on the invoice
    c. Phone: Enter the new vendor's main company phone number
    d. Alternate Phone (optional)
    e. W9 Attachment: Click the Choose File button to upload the W9 completed by the vendor. Must be in PDF, JPG, or PNG format.
7. Click the blue **Save** button when all fields are complete
8. Click the blue **Yes** button to confirm