FIRE DEPARTMENT OF NEW YORK

VENDORCONNECT
USER GUIDE

For support related issues, go to: https://fdny.vendorconnect.nyc/contact.html

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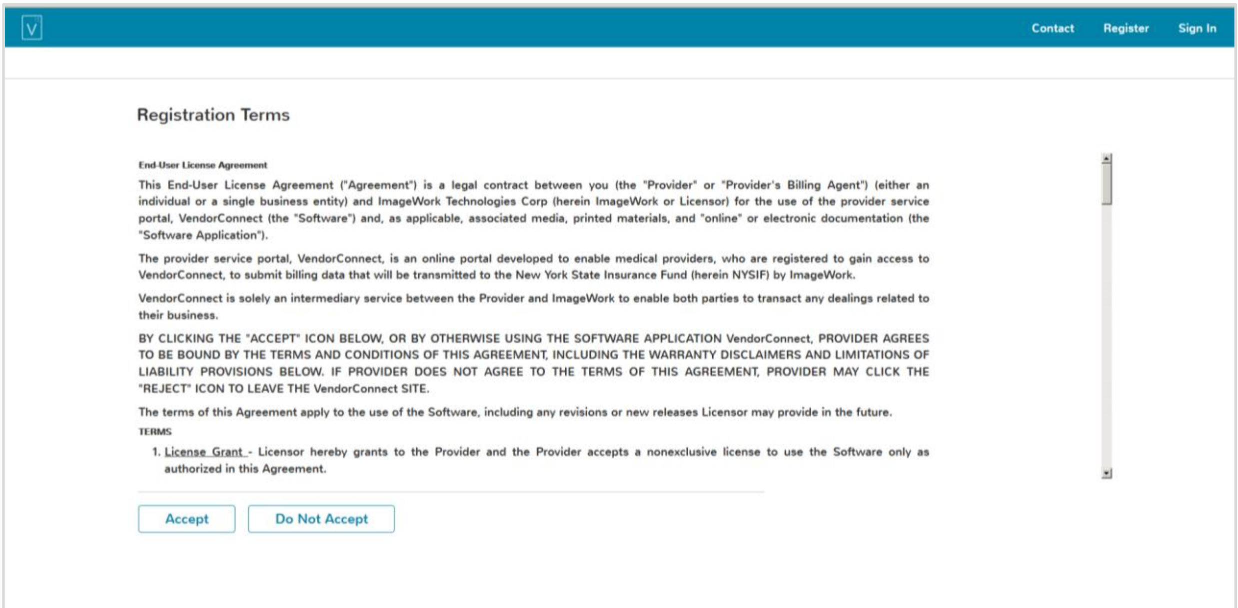
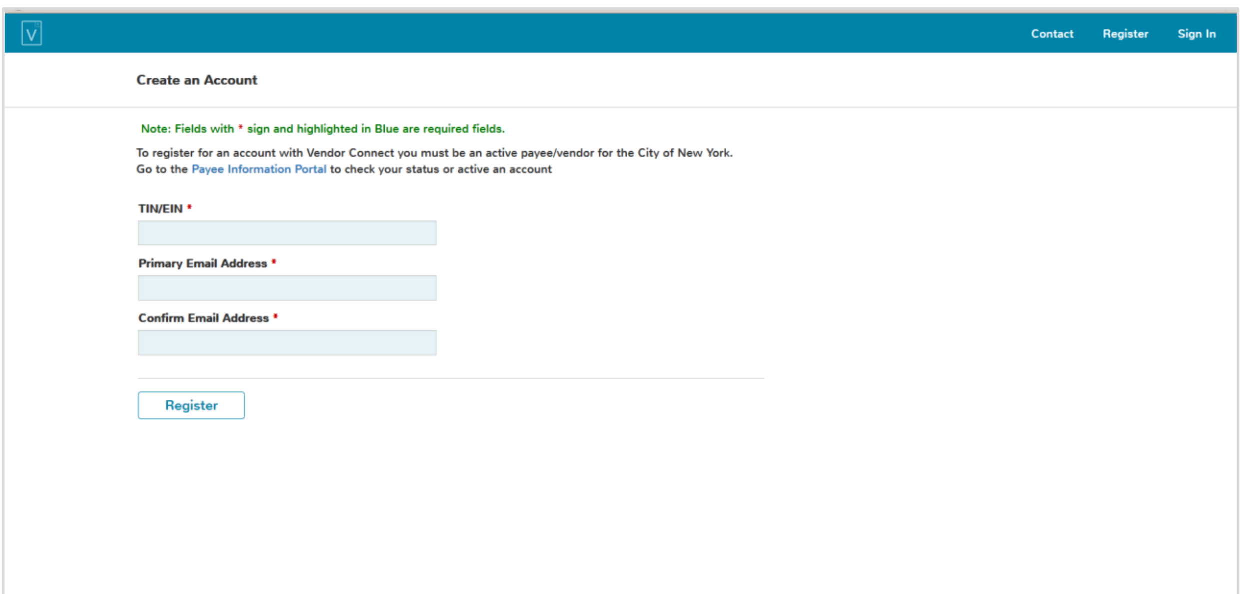
REGISTRATION: PRIMARY ACCOUNT

1. You must select **Accept** to create a Primary Account and use VendorConnect.





2. Enter your **Tax ID Number** (TIN) **or Employer ID Number** (EIN). This is the number your company used to register as a NYC Vendor.

3. Enter and confirm Primary Email Address.

4. Select **Register**.

5. You will see Confirmation message:

   Thank you. Your registration has been submitted and confirmation link has been sent to your contact email.

6. Check your email for the confirmation link regarding registration.

7. The e-mail will indicate:

   Your account request has been granted.

   Please click here to complete your account setup.

8. Click as indicated and you will be brought to the **Create Account** screen.

9. Create a **User Name** and **Password**; enter the password twice. The password should meet the following rules:

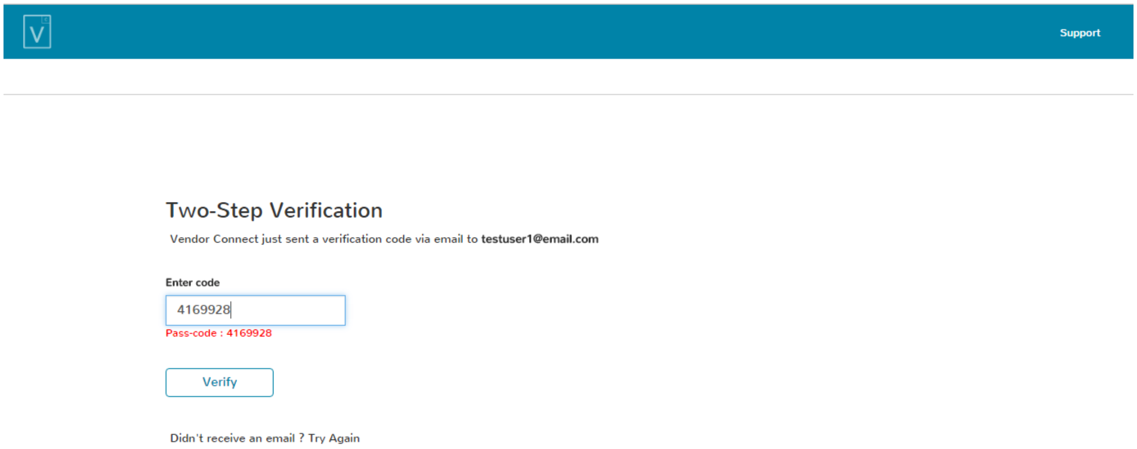
   - Minimum of 8 characters long
   - At least one uppercase letter
   - At least one number or special character such as! $ # %
   - New password should not be same as old password
   - Required to reset password every 90 days

   You will receive a Confirmation message:
   Thank You. Your registration has been successfully completed. Please click here to sign in.

10. Click as indicated and you will be routed to the **Sign In** screen.

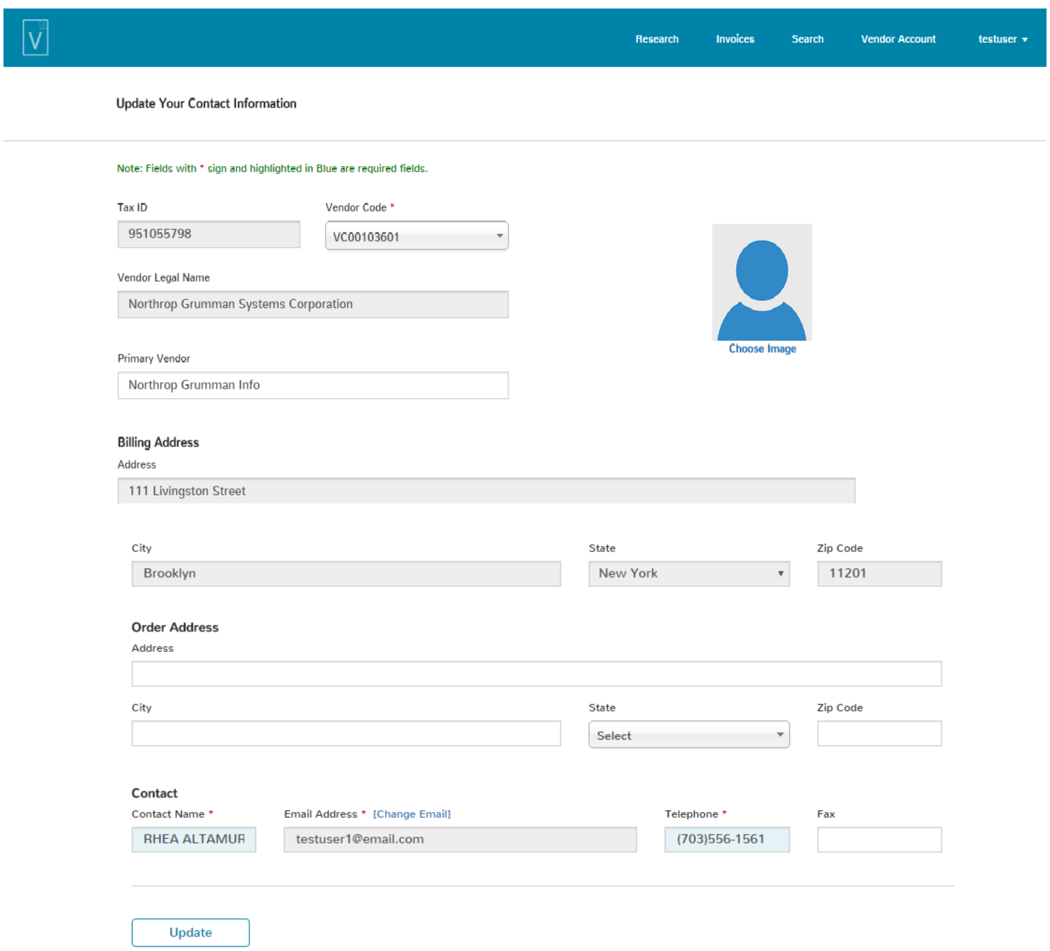
11. Sign in using your new **User Name** and **Password** and you will be directed to a **Passcode Delivered** screen indicating that a Passcode has been sent to your e-mail address. (Please note that the passcode process is only required upon initial registration but you may occasionally be prompted to enter the code for security purposes).

12. Retrieve the Passcode from your e-mail. Enter the Passcode from the email in the Passcode field in VendorConnect, and click on **Verify**. See the screenshot below.



13. You will be brought to the Update your **Contact Information** screen.

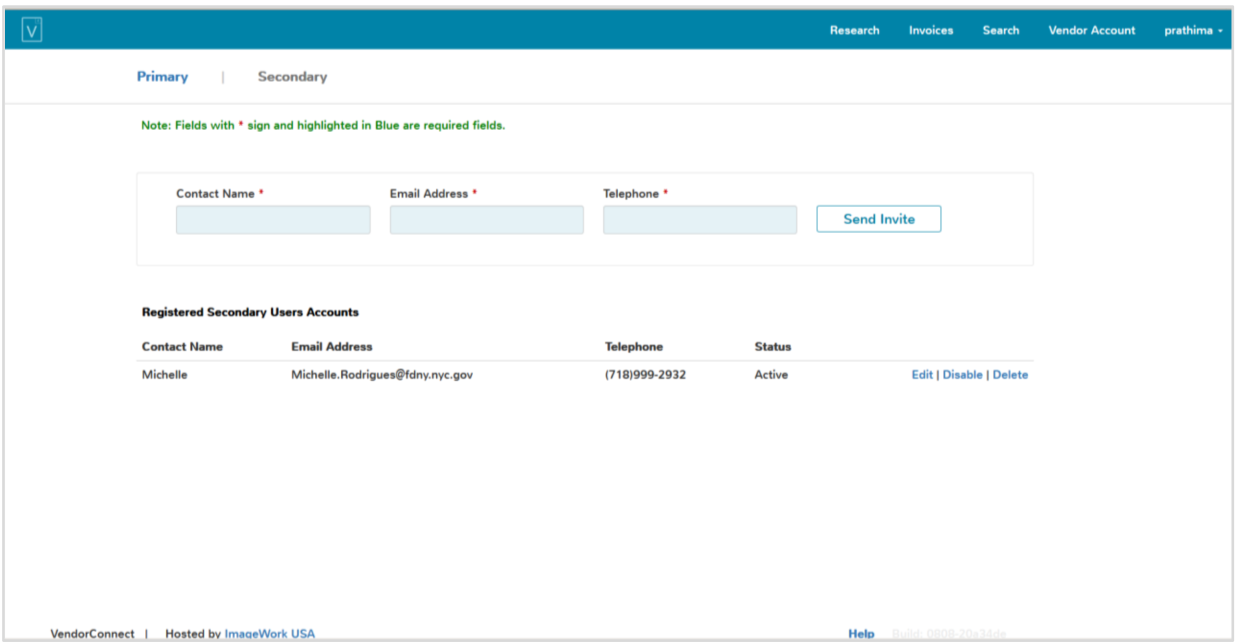
14. Click **Update** after making necessary changes to the contact information. See screenshot below.



15. You are now brought to the **Invoices** screen.

16. From the Invoices screen, you can either begin entering invoices using the **New Invoice** button, or create one or more Secondary Accounts by clicking the **Secondary** link. See instructions below.

REGISTRATION: SECONDARY ACCOUNTS



1. Select the Vendor **Account** Tab at the top of the screen.

2. Select the **Secondary** link to create additional secondary accounts.

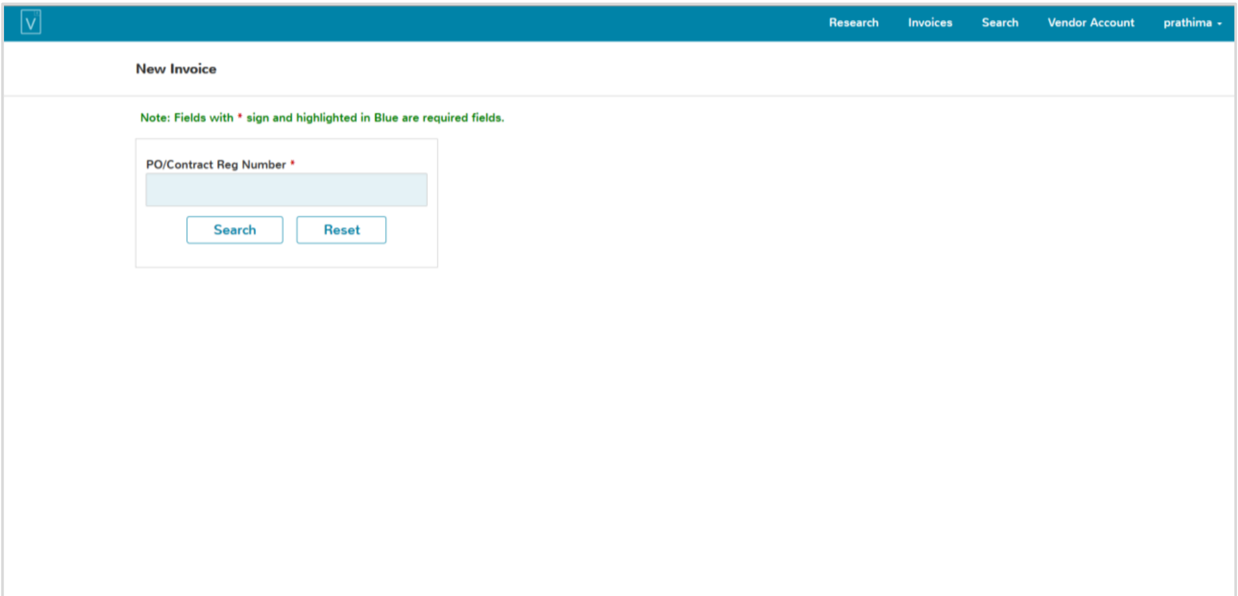
3. Enter the secondary account holder's Contact Name, E-Mail and Telephone Number.

4. Select **SendInvite** to send out the account invitation.

5. The Contact you have added will appear on the screen where the primary account holder can manage it using the **Edit/Disable/Delete** actions.

6. If you need to add another **Contact** repeat steps 3-5 or exit to the Invoice Entry screen by selecting **Invoices** at the top of the screen.

ENTERING NEW INVOICE



1. Invoices are filed using a Contract or Purchase Order (PO/Contract) number that is provided by the agency.

2. Enter the **PO/Contract** number of the invoice.

3. Select **Search**.

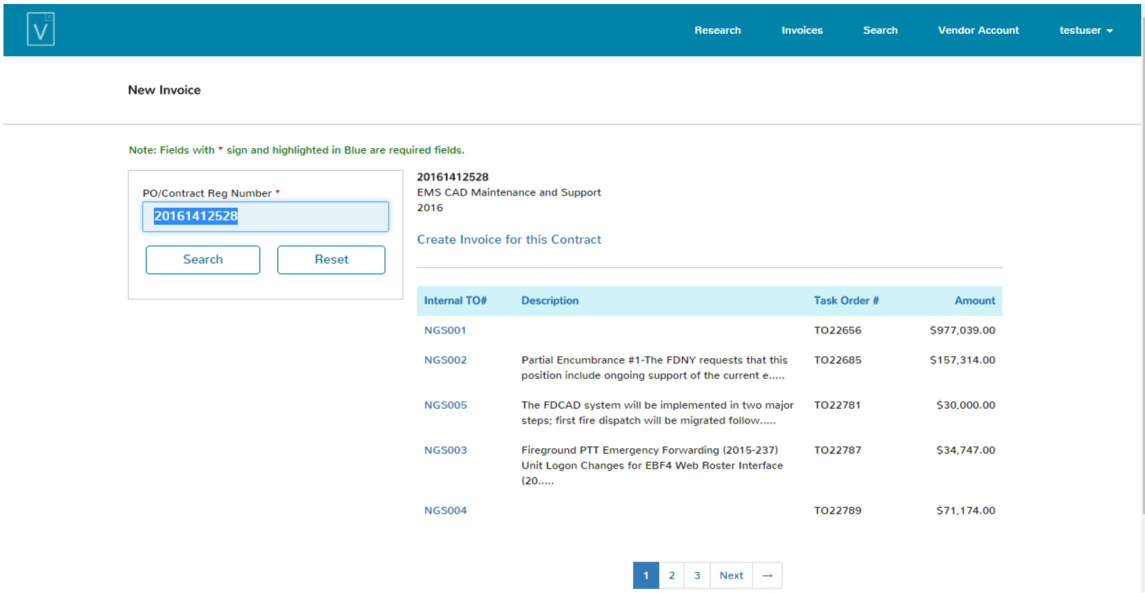
4. If the PO/Contract is found, you will be shown the PO/Contract#, Description, Fiscal year and the amount to verify that you have the correct PO/Contract. If not found, please check the PO/Contract number to make sure it is correct and then re-enter the correct PO/Contract number.

5. Select **PO/Contract#** from the results grid.

6. There are two options to file invoices.

   - Option 1: Enter the invoice for the Contract by Selecting Create invoice for this Contract.

   - Option 2:Enter the invoice for the Task order by Selecting Internal TO# from the grid.



7. You will be brought to a **New Invoice** screen with required Data entry fields highlighted in Blue along with an asterisk sign.

8. If there is a **Task order,** the information with project description will appear on top of the screen for verification.

9. Enter Vendor Invoice Number, Service Commence/Ship Date, Service Complete Date, Vendor Order No, Order Date and Vendor Invoice Amount.

10. Next, specify the line items for the invoice.

11. Select the type of line items like Goods, Services or Both. There are two options to specify line items.

    - Option 1: Select Item(s) from Order. Select the line items and Click on **Copy Selected** button at the bottom of the screen.

    - Option 2: Enter Item No, Description, QTY, and Unit Price and click **Add** after each entry to include the line in the grid. The entry will be listed in the middle of the screen and can be Edited or Deleted as necessary.

12. Enter Shipping and Handling, Discounts or Discount %, if applicable.

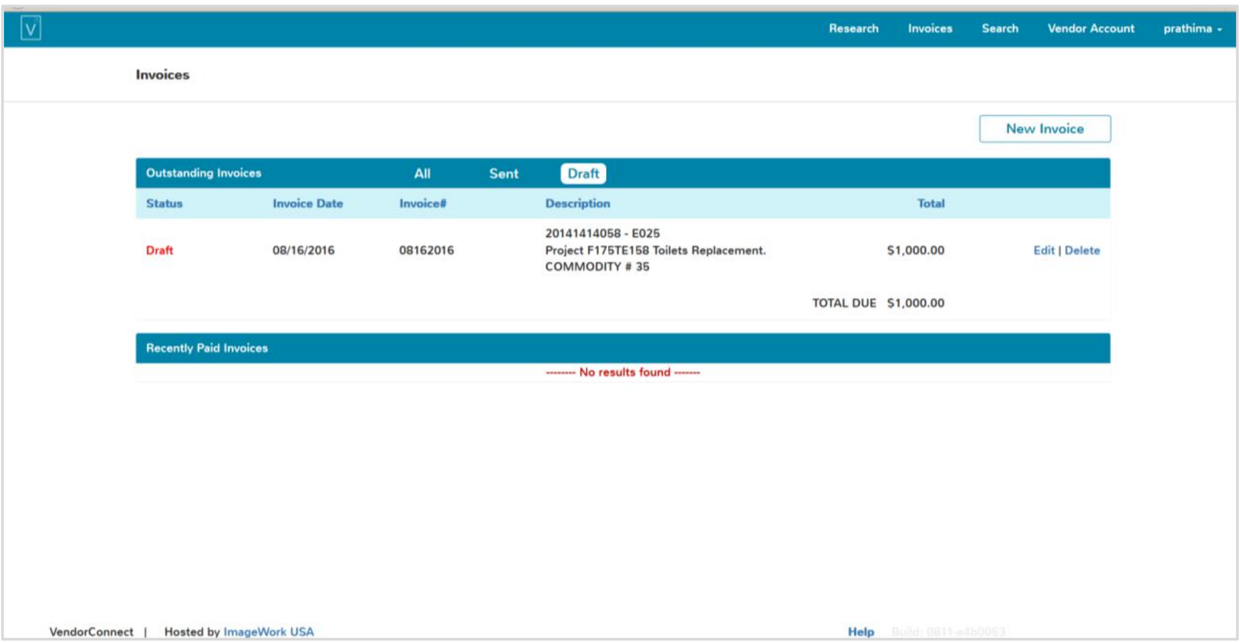
13. Enter any additional information in **Notes,** if needed.

14. Under **Attachments**, select the Document Type that you will be attaching from the drop down list.

15. With a document type selected, click the **Choose Files** button to browse your computer file folders and select a file to attach to this invoice.

16. At this point, you may **Submit**the invoice or click on **Save Draft** to save the invoice for later submission. If a draft has been saved, it will be found in the '**Draft'** queue.

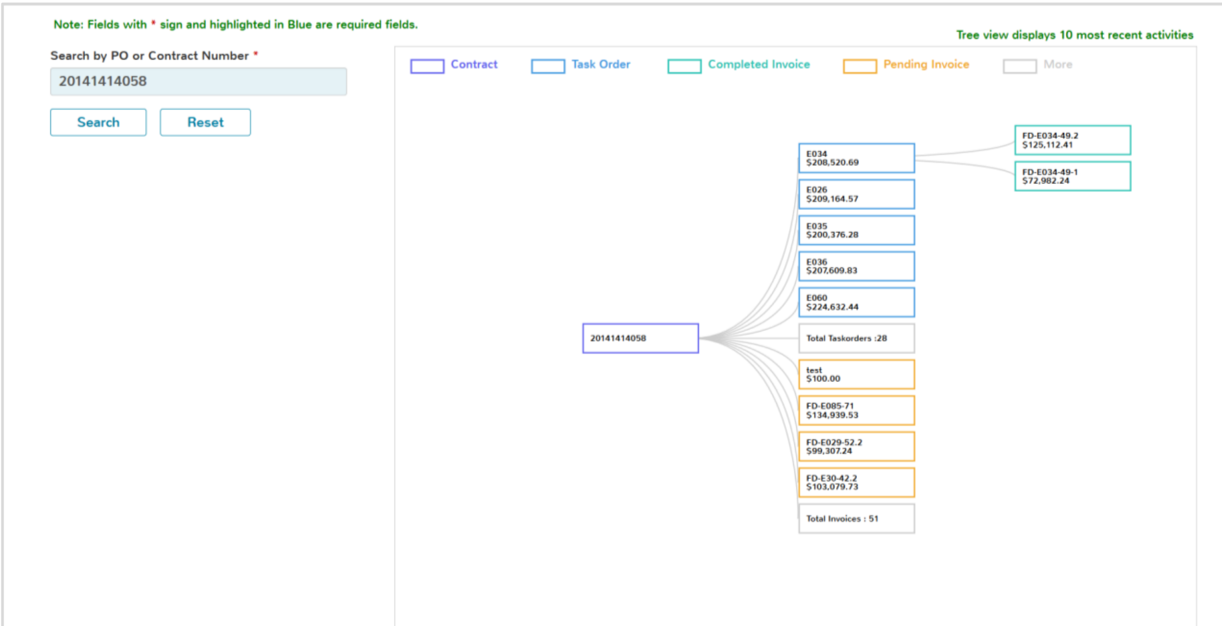
DRAFTS QUEUE



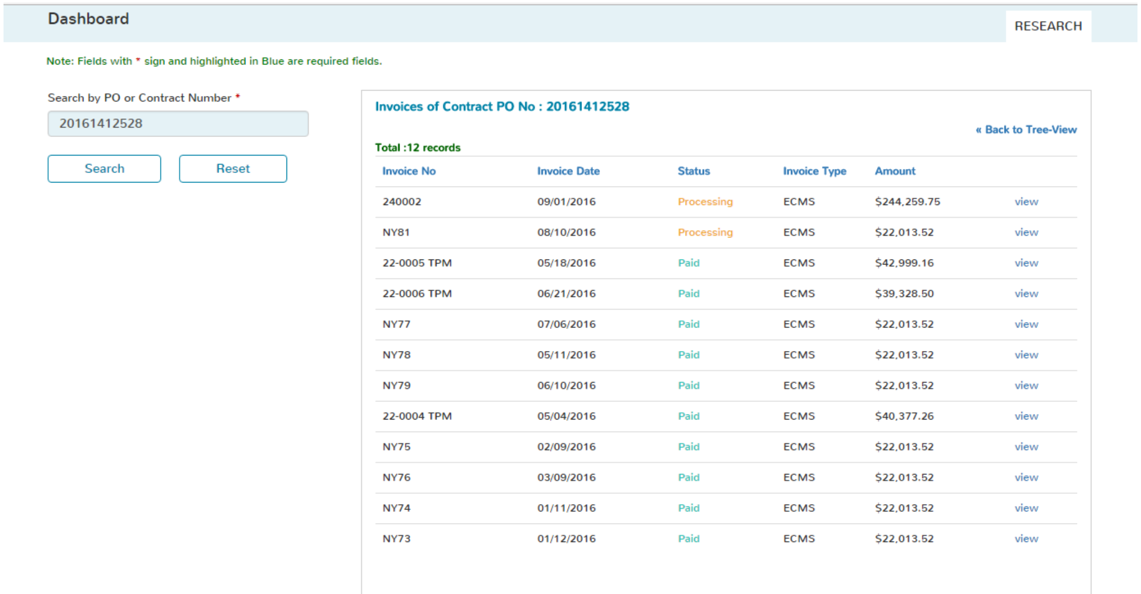
1. Click on the **Draft** tab to access the Draft Invoices queue.

2. You may click on **Edit** to make any required changes before submission or click on **Delete** to delete the invoice draft.

SUBMITTED INVOICES



1. To view the current status of an Invoice, select the **Research** tab at the top of the screen.
2. Enter **PO/Contract** number.
3. Select **Search**.
4. A tree view will be displayed with 10 most recent invoice activities. You can **clickon the invoice** to view the system generated invoice document.
5. You can click on the **Total Invoices** box from the tree view to see the **list view** of all invoices submitted for the PO/Contract.
6. The list view also displays these results: Invoice number, Invoice Date, Status and Invoice Amount. See screenshot below.



Invoice No	Invoice Date	Status	Invoice Type	Amount	
240002	09/01/2016	Processing	ECMS	$244,259.75	view
NY81	08/10/2016	Processing	ECMS	$22,013.52	view
22-0005 TPM	05/18/2016	Paid	ECMS	$42,999.16	view
22-0006 TPM	06/21/2016	Paid	ECMS	$39,328.50	view
NY77	07/06/2016	Paid	ECMS	$22,013.52	view
NY78	05/11/2016	Paid	ECMS	$22,013.52	view
NY79	06/10/2016	Paid	ECMS	$22,013.52	view
22-0004 TPM	05/04/2016	Paid	ECMS	$40,377.26	view
NY75	02/09/2016	Paid	ECMS	$22,013.52	view
NY76	03/09/2016	Paid	ECMS	$22,013.52	view
NY74	01/11/2016	Paid	ECMS	$22,013.52	view
NY73	01/12/2016	Paid	ECMS	$22,013.52	view

7. Invoice status will be of two types:
    - Processing
    - Paid
8. Click the **Invoice** tab on the top of the screen to return to the main page.