



Sending and Tracking Vendor Invitations

Invitations should only be sent to vendors when a requisition is required for payment.

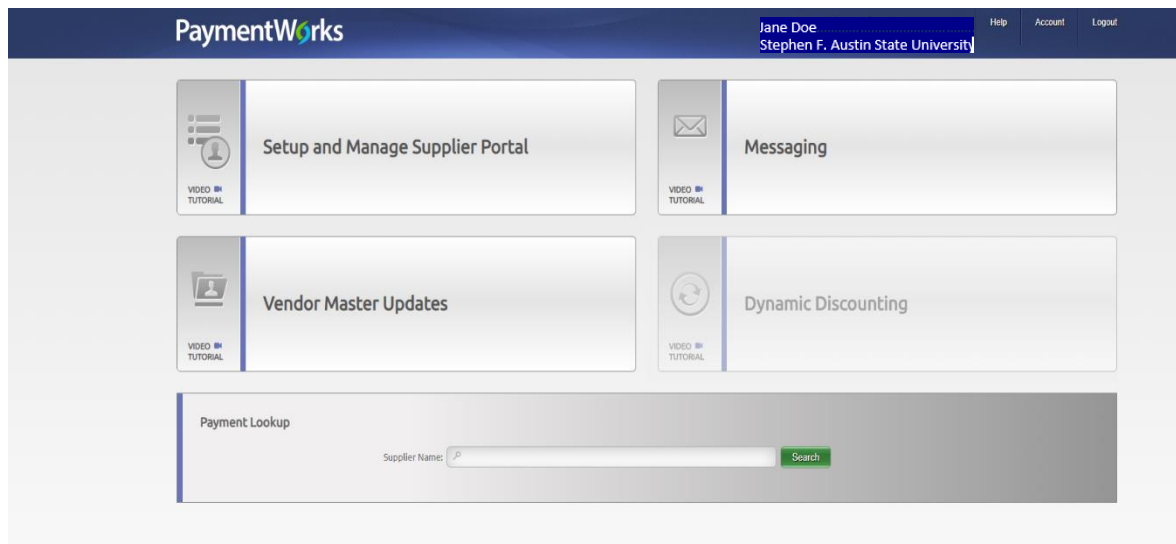
- Business: Send a New Vendor Invite if business is **not found in Banner**
- Individual: Send a New Vendor Invite if the individual is **not in PaymentWorks**
- **Employees, students, or perspective employees should not be entered in PaymentWorks. Send W-9's to accounts payable@sfasu.edu

PaymentWorks link is available in mySFA, under the Resources tab.

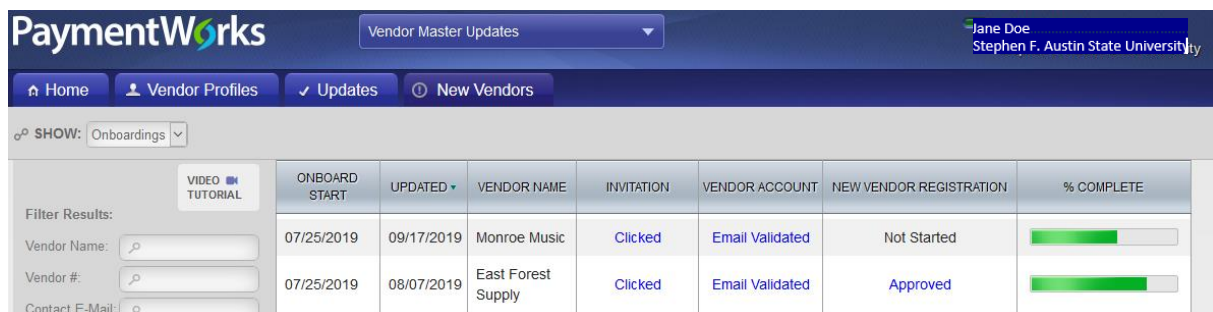
1. Sending Invitations

Initiate the new vendor registration process by sending an invitation to the new vendor. The PaymentWorks link can be found in mySFA on the Resources tab.

Once in PaymentWorks, click on **Vendor Master Updates** on dashboard.



Click on **New Vendors** tab



Click **Send Invitation** at the bottom of the left sidebar to invite a new vendor.

PaymentWorks

Jane Doe
Stephen F. Austin State University

Help Account Logout

New Vendors

SHOW: Onboardings

Need help ?

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

ONBOARD START UPDATED VENDOR NAME INVITATION ACCOUNT NEW VENDOR REGISTRATION % COMPLETE

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The Invite New Vendor screen contains the fields seen below. Use the scroll bar on the right side to navigate the fields. Required fields are indicated with an asterisk*. Adding a Personalized Message is not required but is highly encouraged. The message will be included in the email sent to the new vendor.

Invite New Vendor

Company/Individual Name:*
This field is required.

Contact E-Mail:*

Verify Contact E-Mail:*

Initiator Department:*
i.e. "Athletics"

*Required Field

Cancel Send

Invite New Vendor

Description of product or service:*

Reason for Inviting the Supplier:*
- Choose One -

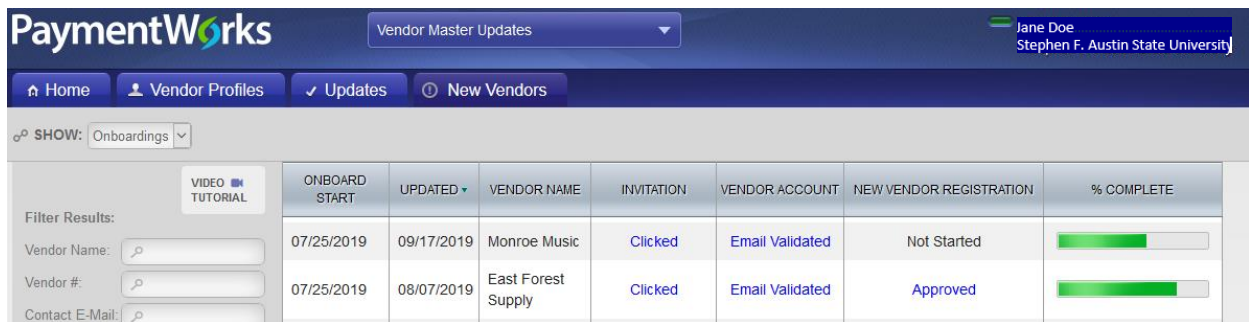
Personalized Message:
Hi John! Per our conversation, please complete this registration so that we can begin doing business with your company!

*Required Field

Cancel Send

Viewing Invitations

Invitations may be viewed by employees with access to PaymentWorks.



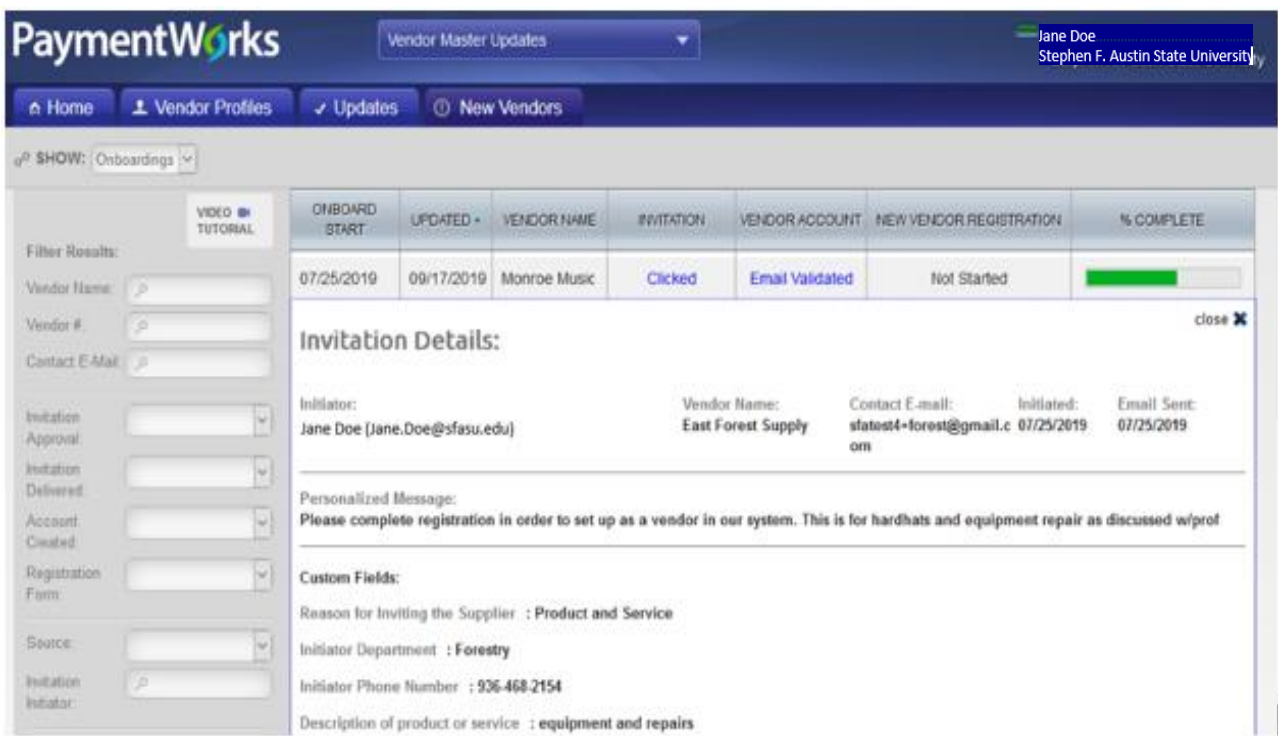
The screenshot shows the PaymentWorks interface with the 'Vendor Master Updates' dropdown menu. The user is Jane Doe from Stephen F. Austin State University. The 'SHOW' filter is set to 'Onboardings'. The table displays two vendors: Monroe Music and East Forest Supply. Both vendors have a 'Clicked' invitation status and an 'Email Validated' vendor account status. Monroe Music's registration is 'Not Started', while East Forest Supply's is 'Approved'. Progress bars are shown for the '% COMPLETE' column.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
07/25/2019	09/17/2019	Monroe Music	Clicked	Email Validated	Not Started	<div></div>
07/25/2019	08/07/2019	East Forest Supply	Clicked	Email Validated	Approved	<div></div>

Invitation details may be viewed by clicking the link in the Invitation column for a new vendor invite. The example below shows the invitation details as entered.

These details include:

- Name and e-mail address of the initiator
- Vendor Name, as filled out in the invitation
- Vendor e-mail address, as filled out in the invitation
- Date the invitation was first sent (will only differ from first sent if the invitation was re-sent)



The screenshot shows the 'Invitation Details' page in PaymentWorks. The page displays the following information:

- Initiator:** Jane Doe (Jane.Doe@sfasu.edu)
- Vendor Name:** East Forest Supply
- Contact E-mail:** sfatest4-forest@gmail.com
- Initiated:** 07/25/2019
- Email Sent:** 07/25/2019
- Personalized Message:** Please complete registration in order to set up as a vendor in our system. This is for hardhats and equipment repair as discussed w/prof
- Custom Fields:**
 - Reason for Inviting the Supplier : Product and Service
 - Initiator Department : Forestry
 - Initiator Phone Number : 936-468-2154
 - Description of product or service : equipment and repairs

Resend Invitation

An invitation may be re-sent if the wrong Contact E-mail address was originally entered. An invitation may only be re-sent with a status of Sent, Delivered, Not Delivered, or Opened. The Personalized Message may be updated if needed, if not, the original message will be included in the invitation being re-sent to the vendor.

Click “Resend Invitation”. The vendor name, email address, and/or Personalized Message may be updated as needed before re-sending the invitation. Once a vendor opens the e-mail, the option to Resend Invitation (as well as cancel reminders) is not available.

An invitation may only be updated or edited by the initiator of the invitation.

The screenshot displays the PaymentWorks Vendor Master Updates interface. At the top, there's a navigation bar with 'Home', 'Vendor Profiles', 'Updates', and 'New Vendors'. A dropdown menu shows 'Vendor Master Updates'. The user is logged in as Jane Doe from Stephen F. Austin State University. Below the navigation bar, there's a 'SHOW: Onboardings' filter. The main content area is divided into a sidebar with filter results and a central table. The table has columns for 'ONBOARD START', 'UPDATED', 'VENDOR NAME', 'INVITATION', 'VENDOR ACCOUNT', 'NEW VENDOR REGISTRATION', and '% COMPLETE'. A modal window titled 'Invitation Details' is open, showing information for a vendor named 'Sweet Photography'. The modal includes fields for Initiator (Jane Doe), Vendor Name (Sweet Photography), Contact E-mail (statet4+sweet@gmail.com), Initiated (07/25/2019), and Email Sent (07/25/2019). It also displays a personalized message and custom fields such as Reason for Inviting the Supplier (Product and Service), Initiator Department (Art work and Guest speaker), Initiator Phone Number (936-468-2934), and Description of product or service (Art Work and Guest Speaker). At the bottom of the modal, there are buttons for 'Cancel Reminders' and 'Resend Invitation'.

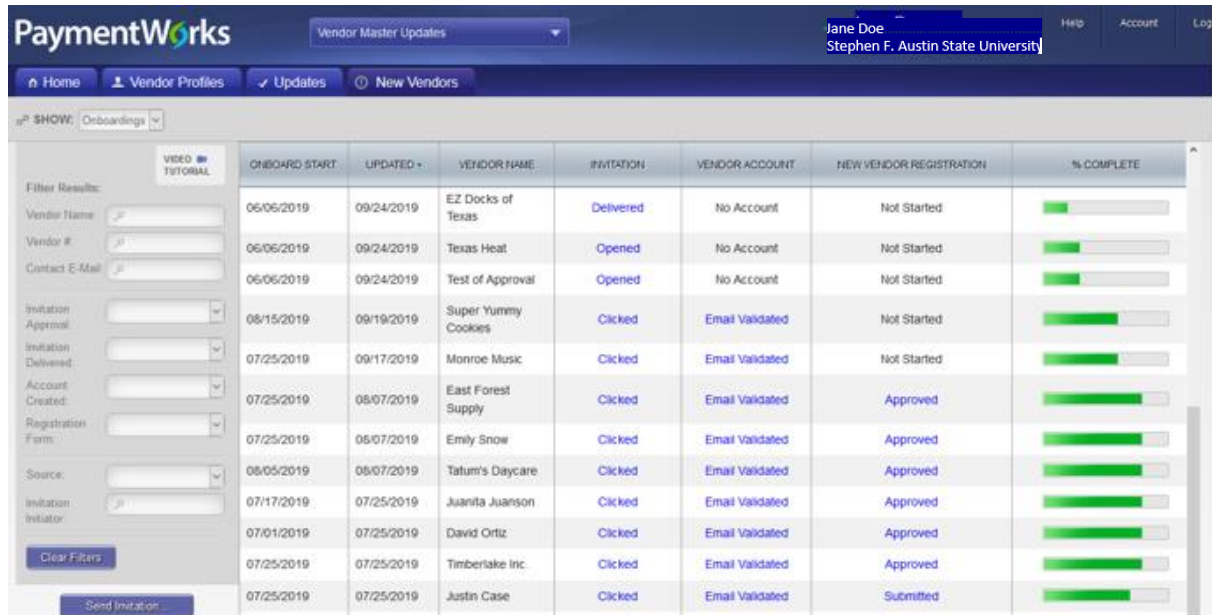
ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Invitation Details:						
Initiator:		Vendor Name:		Contact E-mail:	Initiated:	Email Sent:
Jane Doe (Jane.Doe@sfasu.edu)		Sweet Photography		statet4+sweet@gmail.com	07/25/2019	07/25/2019
Personalized Message:						
Please contact me if you have any questions or concerns. Thanks, Jane Doe						
Custom Fields:						
Reason for Inviting the Supplier : Product and Service						
Initiator Department : Art work and Guest speaker						
Initiator Phone Number : 936-468-2934						
Description of product or service : Art Work and Guest Speaker						
				Cancel Reminders	Resend Invitation	

Cancel Reminders

Cancel Reminders should only be used to stop the invitation process. Reminders are sent day 1, 3, 7 and every 7 days after.

2. Tracking Invitations

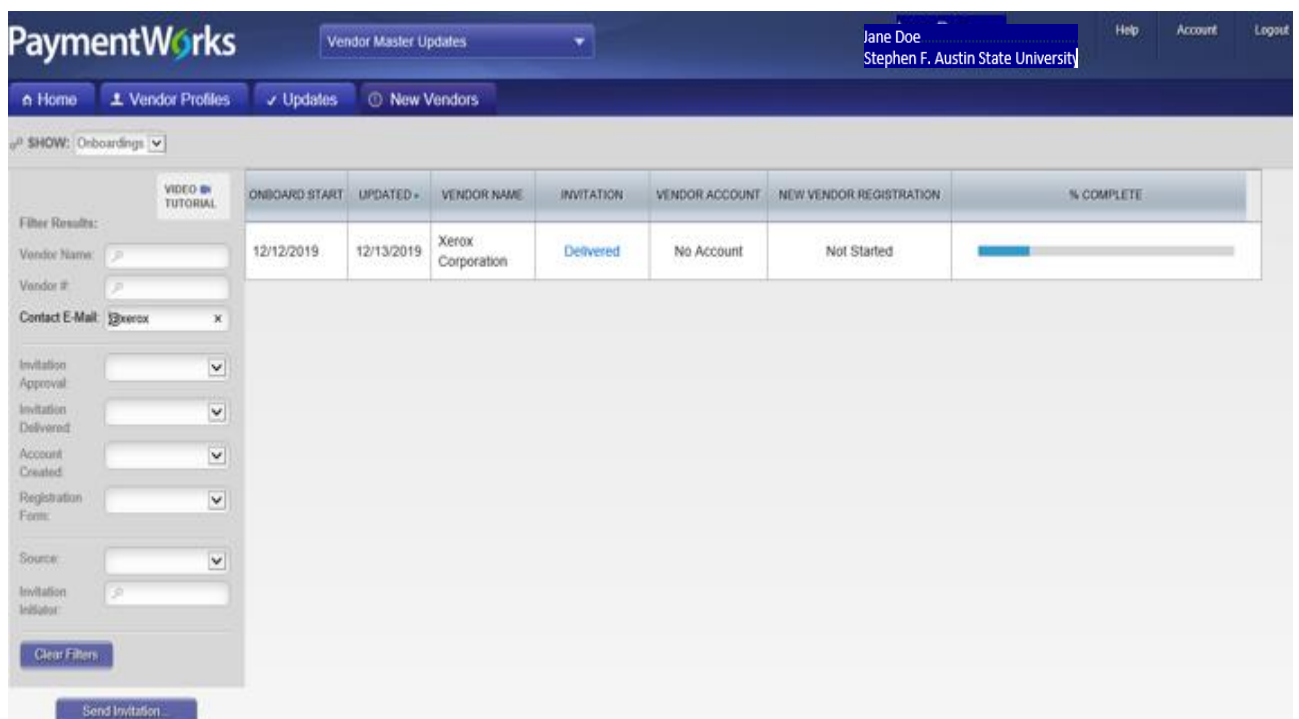
All invitations may be viewed in Onboardings, as seen below.



The screenshot shows the PaymentWorks interface with the 'Vendor Master Updates' dropdown menu. The user is logged in as Jane Doe, Stephen F. Austin State University. The 'SHOW: Onboardings' filter is selected. The table displays the following data:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
06/06/2019	09/24/2019	EZ Docks of Texas	Delivered	No Account	Not Started	<div></div>
06/06/2019	09/24/2019	Texas Heat	Opened	No Account	Not Started	<div></div>
06/06/2019	09/24/2019	Test of Approval	Opened	No Account	Not Started	<div></div>
08/15/2019	09/19/2019	Super Yummy Cookies	Clicked	Email Validated	Not Started	<div></div>
07/25/2019	09/17/2019	Monroe Music	Clicked	Email Validated	Not Started	<div></div>
07/25/2019	08/07/2019	East Forest Supply	Clicked	Email Validated	Approved	<div></div>
07/25/2019	08/07/2019	Emily Snow	Clicked	Email Validated	Approved	<div></div>
08/05/2019	08/07/2019	Tatum's Daycare	Clicked	Email Validated	Approved	<div></div>
07/17/2019	07/25/2019	Juanita Juanson	Clicked	Email Validated	Approved	<div></div>
07/01/2019	07/25/2019	David Ortiz	Clicked	Email Validated	Approved	<div></div>
07/25/2019	07/25/2019	Timberlake Inc.	Clicked	Email Validated	Approved	<div></div>
07/25/2019	07/25/2019	Justin Case	Clicked	Email Validated	Submitted	<div></div>

Filter Results on the side bar may be used to search for a specific vendor. See example of a search for a vendor Contact E-Mail.



The screenshot shows the PaymentWorks interface with the 'Vendor Master Updates' dropdown menu. The user is logged in as Jane Doe, Stephen F. Austin State University. The 'SHOW: Onboardings' filter is selected. The 'Filter Results' sidebar on the left shows the 'Contact E-Mail' filter set to 'xerox'. The table displays the following data:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
12/12/2019	12/13/2019	Xerox Corporation	Delivered	No Account	Not Started	<div></div>

IMPORTANT NOTE: A vendor must create a PaymentWorks account as well as submit a New Vendor Registration. A vendor is not fully onboarded with SFA until there is a status of **Complete** in the New Vendor Registration column.

Onboarding Statuses

INVITATION column

Clicking a link in this column will display the invitation information as entered by the initiator.

- Sent: The invitation was sent to the email address included in the invitation. The invitation may need to be re-sent if this status does not change to Opened. Confirm the email address or enter a new email address to resend invitation.
- Delivered: The invitation was delivered to the vendor's email, however the recipient has not opened the email. If it remains in this status for long, the vendor may need to check their spam/junk folder.
- Not Delivered: The vendor's email server rejected the invitation. This status is rare. It may be necessary to try a different email address, or have the vendor's IT department make the appropriate changes to allow PaymentWorks to go through their server.
- Opened: The vendor has opened the email, but they have not yet clicked the link to begin the onboarding process.
- Clicked: The vendor opened the email and followed the link to PaymentWorks to create a PaymentWorks account. Please note that once a vendor clicks an invitation, you can no longer re-send the invitation.
- Cancelled: Initiator has clicked the "Cancel Reminders" link for that vendor.

VENDOR ACCOUNT column

- No Account: The vendor has not yet set up a PaymentWorks account.
- Registered: The vendor has created their PaymentWorks account and has not validated their email. Validation email was sent by PaymentWorks.
- Email Validated: The vendor has created their PaymentWorks account and their email has been validated. Clicking this link will show the details submitted by the vendor.

NEW VENDOR REGISTRATION column

- Not Started: The vendor has not started their new registration form.
- Submitted: The vendor has submitted the registration for review.
- Returned: The registration has been returned to the vendor for correction or clarification.
- Approved: The registration has been approved.
- Processed: The registration has been processed and awaiting connection with Banner.
- Complete: The Banner connection was successful and the Banner ID # is displayed.

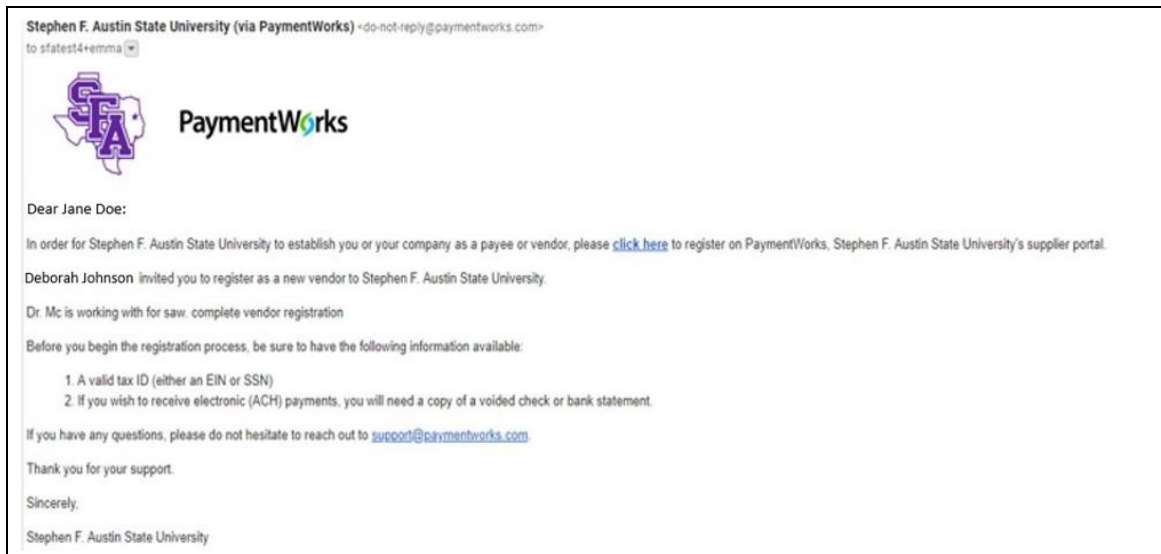
- Rejected: The registration has been rejected.

Onboarding Process Overview



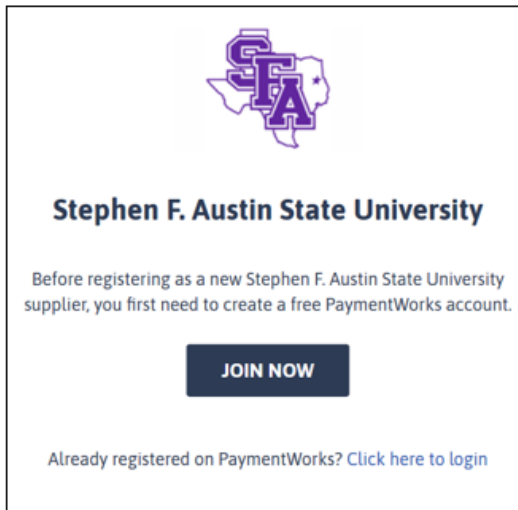
Step 1: SFA Sends Invitation

The SFA end-user will initiate an invitation in PaymentWorks to a vendor who will be requiring payment. An example of the invitation is below. The invitation will include a link that prompts the vendor to connect via PaymentWorks.



Step 2: Vendor Creates PaymentWorks Account

From the emailed invitation, the vendor will be prompted to join PaymentWorks. The vendor will then receive a separate email to verify their account. A vendor cannot access their account if they do not verify their e-mail. Vendors with an existing PaymentWorks account will be prompted to connect with SFA after logging into PaymentWorks.



Payees (Suppliers)
Join PaymentWorks for Free

Personal Information

First Name Last Name

Company Name / Doing Business As (optional)

Title

Email

Confirm Email

Telephone

Create Password

Password

Confirm Password

☐ I agree to the terms of service

JOIN NOW

1 2 3 4
Vendor Registration Step 1 of 4

Step 3: Vendor Completes New Vendor Registration Form

After the vendor has joined PaymentWorks and verified their account, the first log in will prompt them to complete the New Vendor Registration Form. This form allows vendors to provide their business profile information, including their address, their tax information such as EIN (for businesses) or SSN (for individuals), a W9 form (or similar for international vendors), and choose their preferred payment method and submit direct deposit information.

This screenshot shows the 'New Vendor Registration' form for Stephen F. Austin State University. The header includes the SFA logo and the title 'New Vendor Registration'. A personalized welcome message reads 'Welcome, Mary Monroe!'. The instructions state: 'In order to onboard as a new vendor, you will have to fill out and submit the following form to Stephen F. Austin State University. You will be notified by email when your application is processed.' The form is divided into two main sections. The 'Tax Information' section on the left includes a note: 'All fields marked with a red asterisk (*) are required fields. All other fields are optional.' The 'For tax purposes, which best describes you?*' section on the right contains two radio button options: 'Individual, Sole Proprietorship, or Single-member LLC' and 'Corporation or other complex business entity'.

Step 4: SFA Accounts Payable Approval Process

Once the New Vendor Registration Form has been submitted by the vendor, the SFA Accounts Payable department will review the information that has been submitted and take the appropriate action to connect the vendor to SFA.

Step 5: Connected!

Once approved by SFA Accounts Payable, the vendor connection in PaymentWorks will be complete and the data will be interfaced with Banner with a Campus ID number given.