

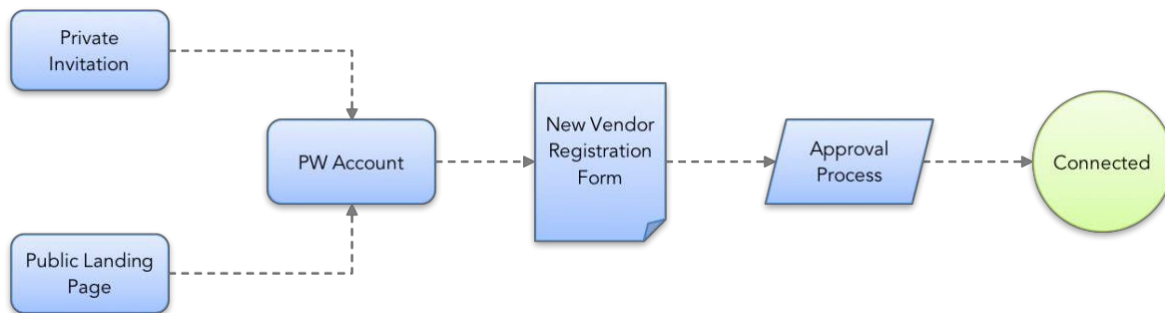


Initiator Quick Reference Sending and Tracking Invitations

Overview:

Invitations should only be sent to vendors when a requisition would be entered for payment. This does not include students, employees and prospective employees. Please verify if the vendor is in Banner. If they are not set up please send a PaymentWorks invitation. PaymentWorks link is available in mySFA, under the Resources tab.

Workflow



To send:

- 1) Login to **mySFA**, click the **Resources Tab**, then click the **PaymentWorks** link
- 2) Click on **Vendor Master Updates**
- 3) Click on **New Vendors tab**
- 4) Click on the **Send Invitation** button at the bottom of the left sidebar
- 5) Enter information on invite accordingly
 - a) Personalized message should include any information pertaining to the reason why the vendor is onboarding with SFA
- 6) Select **Send**

To track:

- 1) Click on a link in the **Invitation Column** to expand the desired invitation and view details
 - a) **Important Note:** Vendors must create a PaymentWorks account in addition to submitting a New Vendor Registration to complete the onboarding process. Creating an account does not mean the vendor is finished with the new vendor registration process.

Invitation Status Descriptions

- **Invitation Sent:** An acknowledgement the invitation successfully sent.
 - *If the date is more than a day old, the email may not have been successful. In these cases, you may need to check that the email address is correct.*
- **Invitation Delivered:** The invitation has sent to the vendor's email server, but it not yet opened.
 - *If it remains in this status for long, the vendor may need to check their Spam/Junk folder.*
- **Invitation Not Deliverable:** The vendor's email server rejected the invitation (rare).
 - *Recommendations: try a different email address, or request the vendor's IT department to "white list" PaymentWorks.com (i.e. allow the PaymentWorks e-mail address to go through their server).*
- **Invitation Opened by Recipient:** The vendor has opened the email, but has not yet clicked the link to begin the onboarding.
- **Invitation Link Clicked:** The vendor followed the link to PaymentWorks. Once a vendor clicks an invitation, it can no longer be re-sent.
 - *This status should not appear for long, because the vendor should begin creating their PaymentWorks account.*
- **Self-Registered:** The vendor went to the Payer's Public landing page (www.paymentworks.com/company) to join PaymentWorks.

New Vendor Registration Status Descriptions

- **New Vendor Registration Submitted:** The vendor submitted the form but it has not been processed.
 - *These New Vendor Requests will appear as "Pending".*
- **New Vendor Registration Approved:** The Finance department has approved the form.
 - *This is redundant with Approvals shown under New Vendor Requests.*
- **New Vendor Registration Processed:** The form has been processed and sent to your organization's financial system.
 - *This is redundant with Approvals shown under New Vendor Requests.*
- **New Vendor Registration Complete:** The form has been received and the vendor connection made. This is the same as status = "Connected" under New Vendor Requests.
 - *If the vendor is still asking for next steps, you may suggest they login to PaymentWorks and check their Invoices Tab.*
- **New Vendor Registration Rejected:** Your Finance Department has rejected the submitted form.
 - *This is redundant with Rejected shown under New Vendor Requests.*
- **Invitation/Reminders Cancelled:** Someone from the Payer has clicked the "Cancel Reminders" link for that vendor.

