Sending and Tracking Vendor Invitations

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

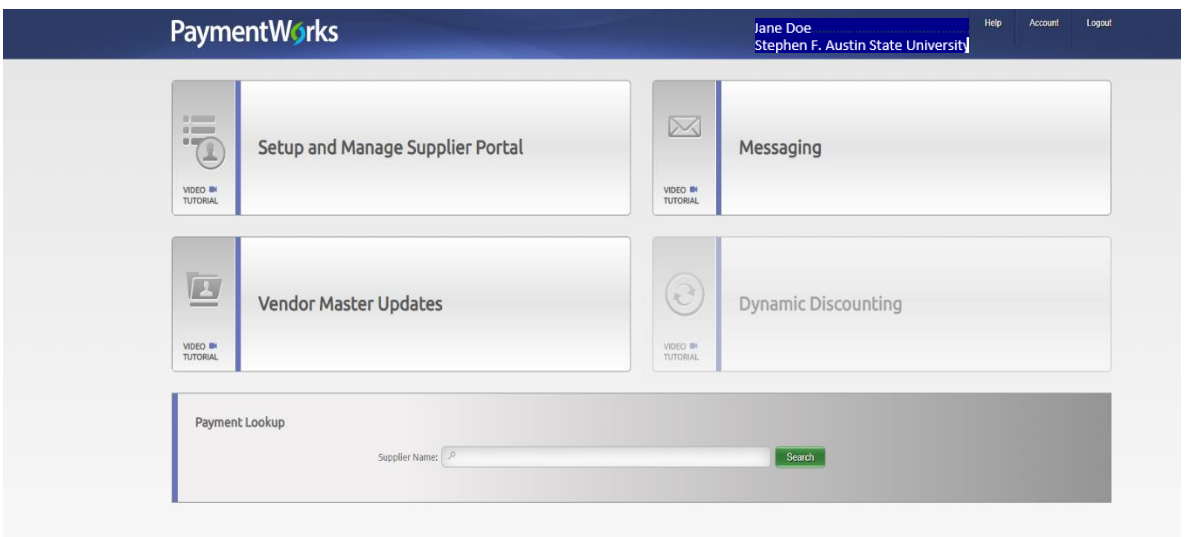
- Business: Send a New Vendor Invite if business **is not found in Banner**
- Individual: Send a New Vendor Invite if the individual is **not in PaymentWorks**
- **Employees, students, or perspective employees should not be entered in PaymentWorks. Send W-9's to accountspayable@sfasu.edu

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

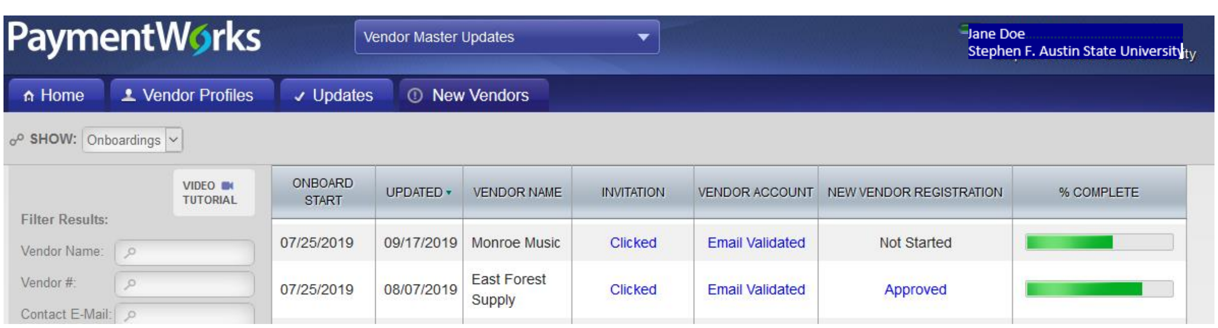
1. Sending Invitations

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.

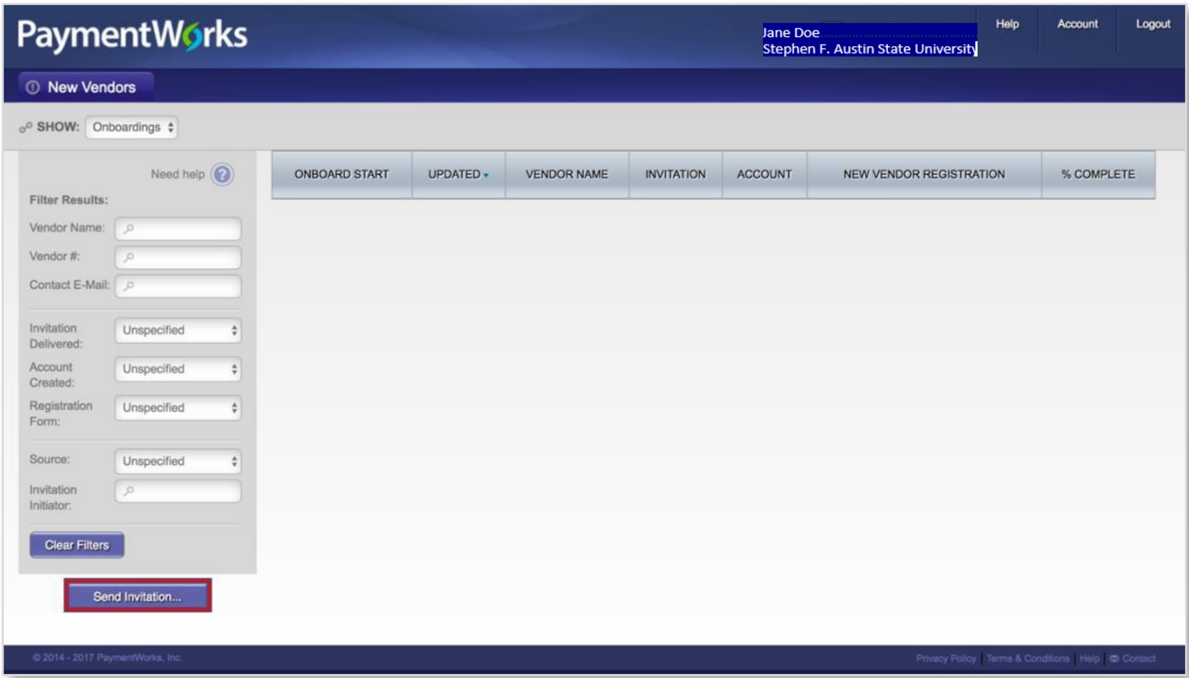
Once in PaymentWorks, click on **Vendor Master Updates** on dashboard.



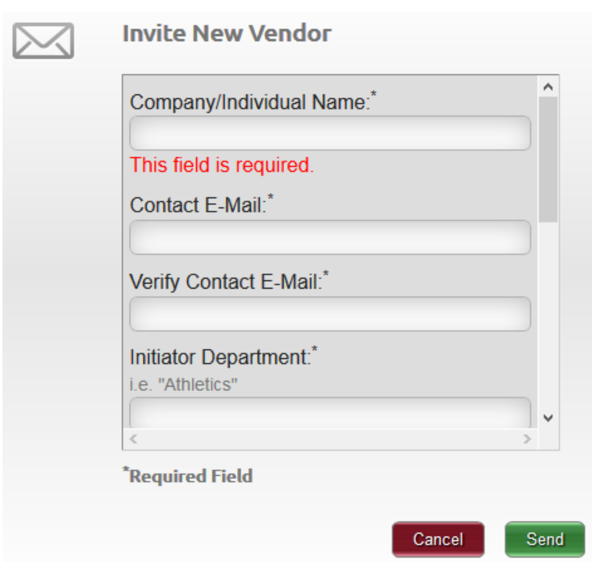
Click on **New Vendors** tab

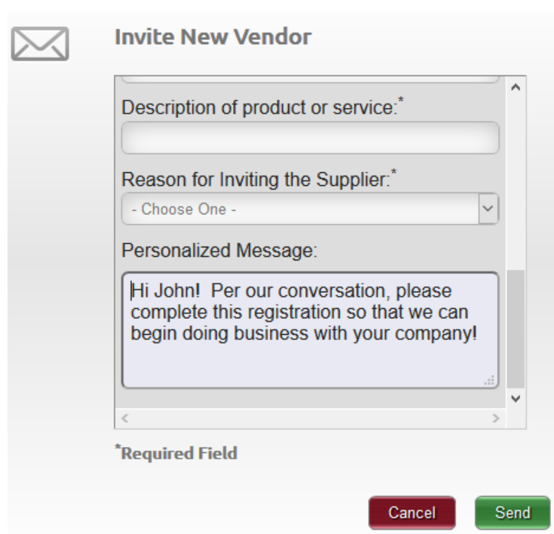


Click **Send Invitation** at the bottom of the left sidebar to invite a new vendor.



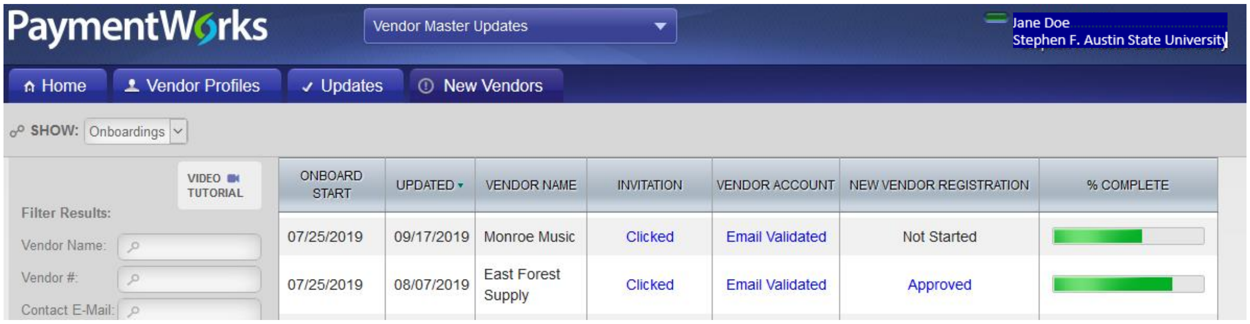
The Invite New Vendor screen contains the fields seen below. Use the scroll bar on the right side to navigate the fields. Required fields are indicated with an asterisk*. Adding a Personalized Message is not required but is highly encouraged. The message will be included in the email sent to the new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





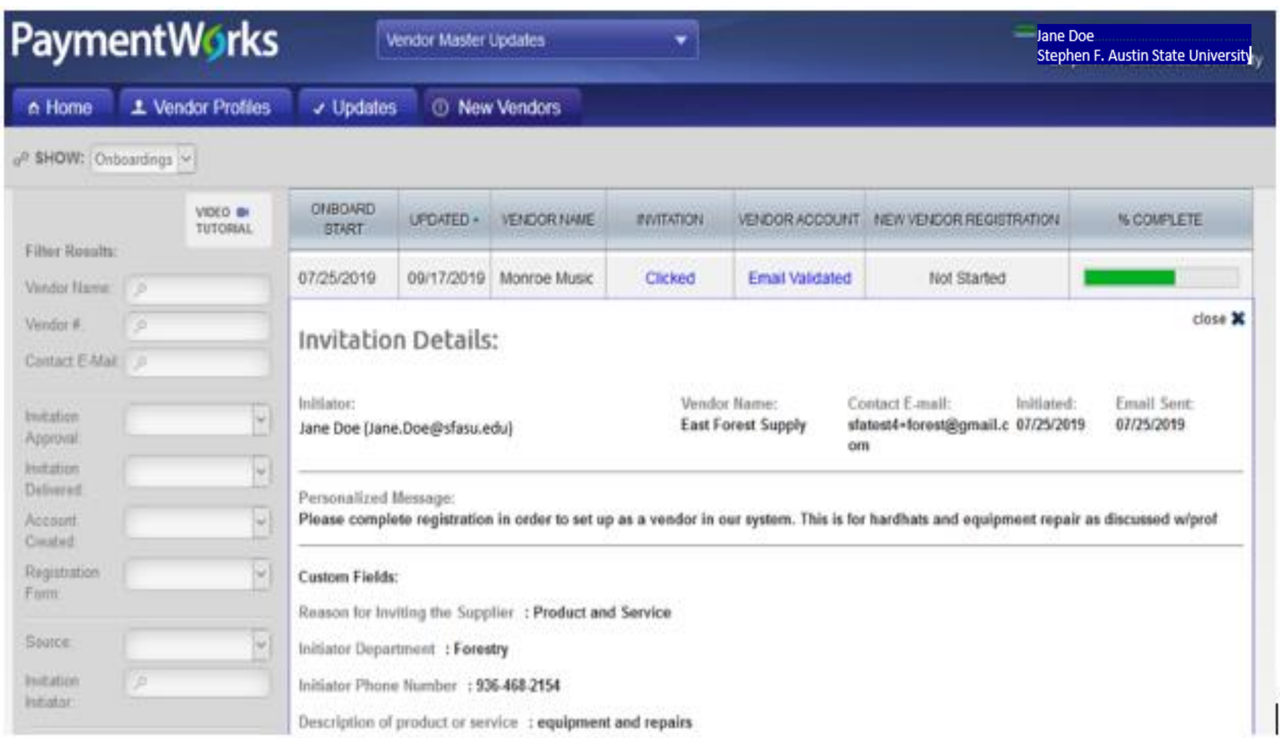
Viewing Invitations

Invitations may be viewed by employees with access to PaymentWorks.



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)

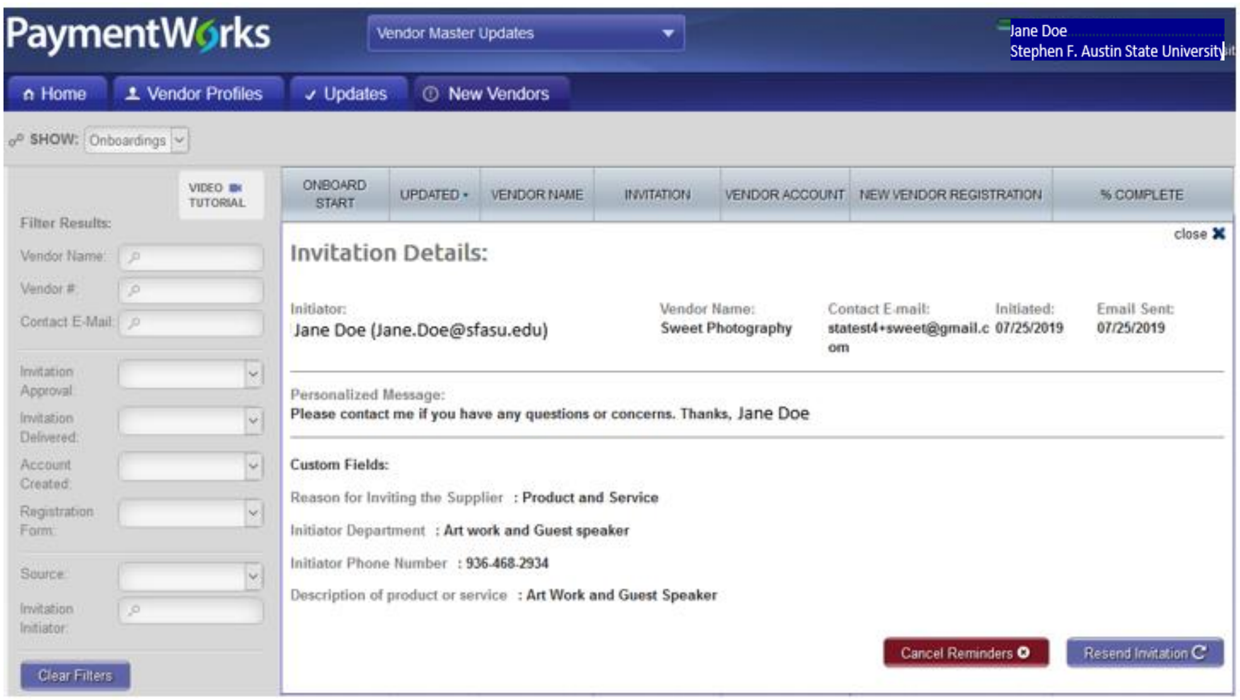


Resend Invitation

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.

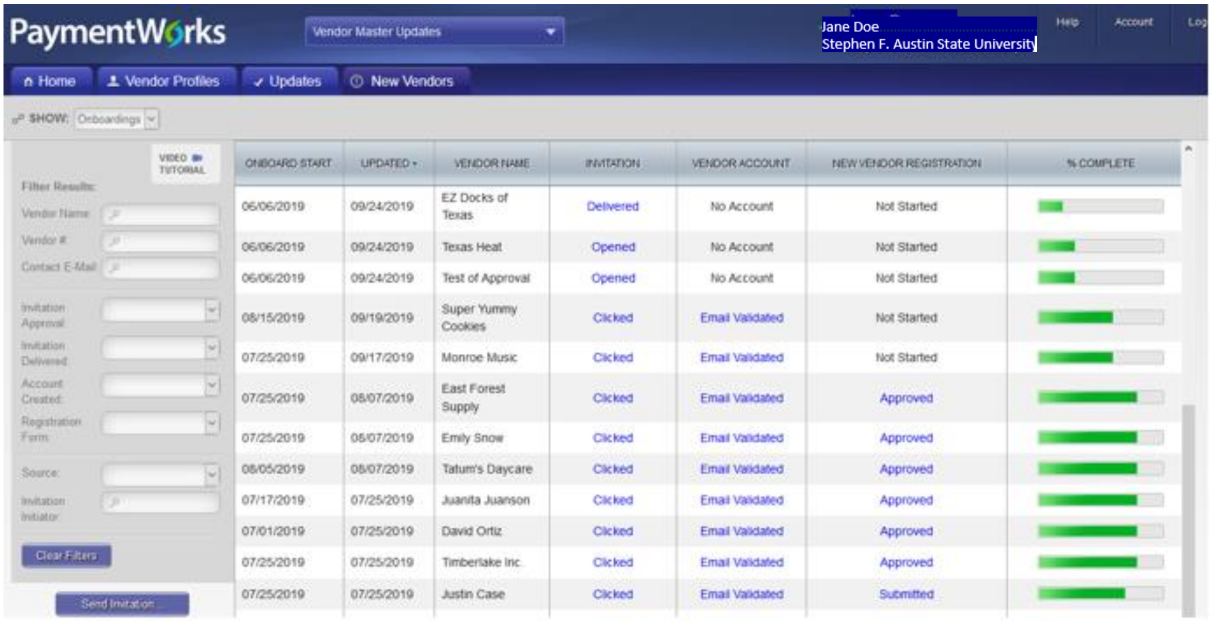


Cancel Reminders

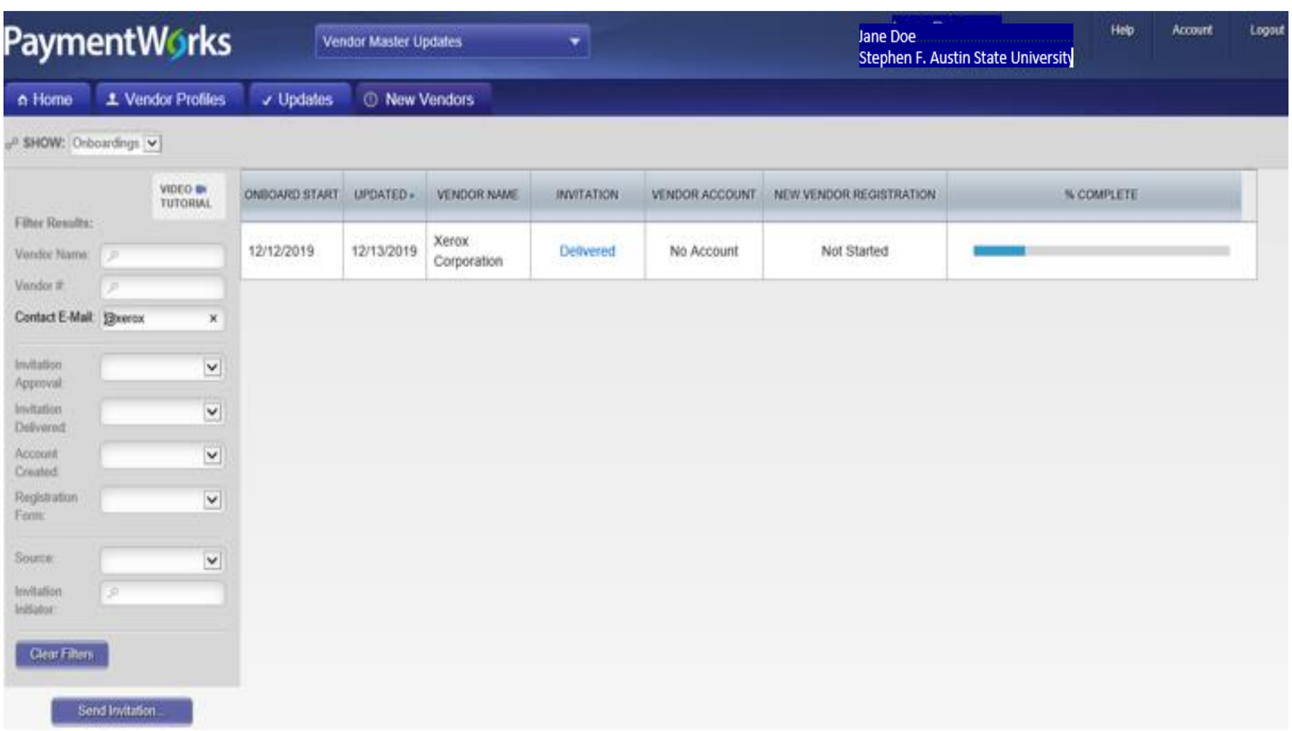
Cancel Reminders should only be used to stop the invitation process. Reminders are sent day 1, 3, 7 and every 7 days after.

2. Tracking Invitations

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



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.



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

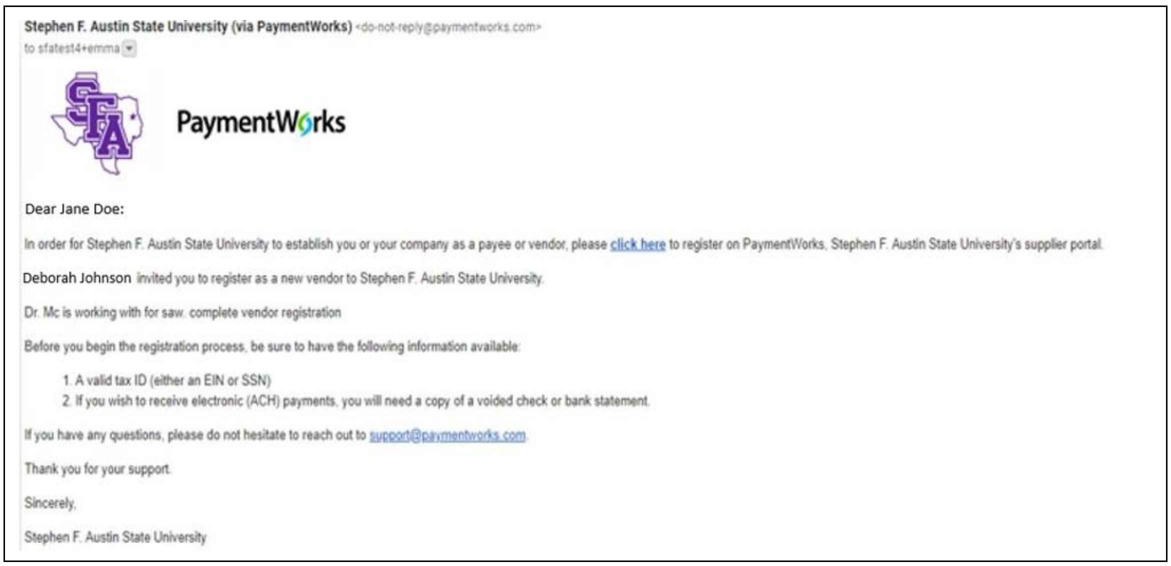
- Not Started: The vendor has not started their new registration form.
- Submitted: The vendor has submitted the registration for review.
- Returned: The registration has been returned to the vendor for correction or clarification.
- Approved: The registration has been approved.
- Processed: The registration 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.



Stephen F. Austin State University (via PaymentWorks) <do-not-reply@paymentworks.com>
to sfatest4+emma

PaymentWorks

Dear Jane Doe:

In order for Stephen F. Austin State University to establish you or your company as a payee or vendor, please click here to register on PaymentWorks, Stephen F. Austin State University's supplier portal.

Deborah Johnson invited you to register as a new vendor to Stephen F. Austin State University.

Dr. Mc is working with for saw. complete vendor registration

Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (either an EIN or SSN)
2. If you wish to receive electronic (ACH) payments, you will need a copy of a voided check or bank statement.

If you have any questions, please do not hesitate to reach out to support@paymentworks.com.

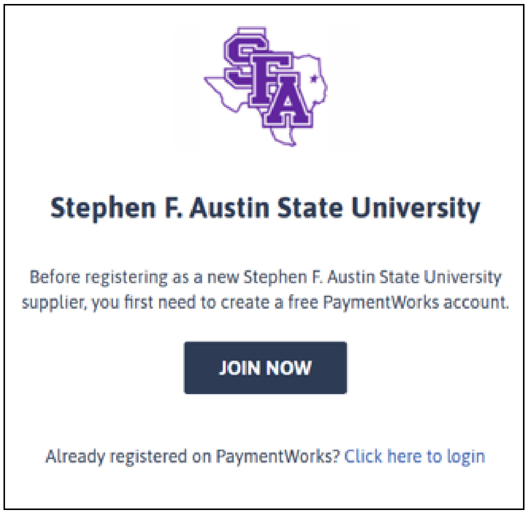
Thank you for your support.

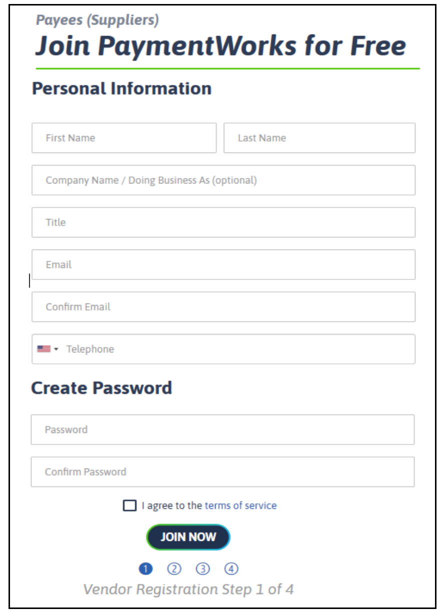
Sincerely,

Stephen F. Austin State University

Step 2: Vendor Creates PaymentWorks Account

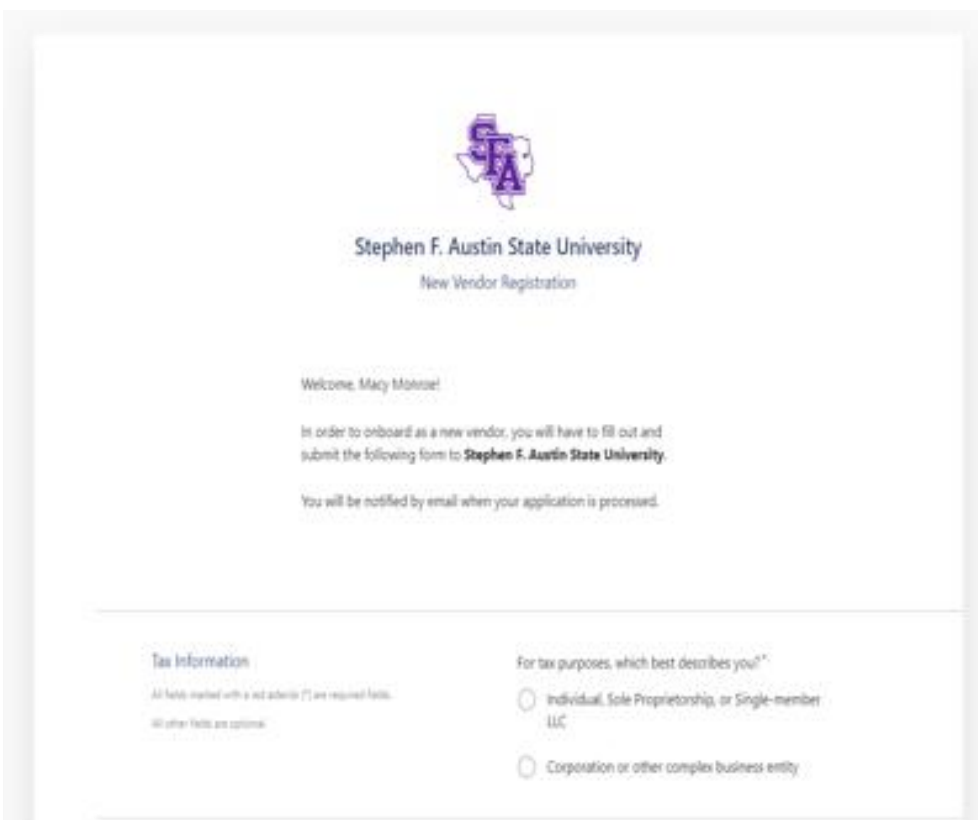
From the emailed invitation, the vendor will be prompted to join PaymentWorks. The vendor will then receive a separate email to verify their account. A vendor cannot access their account if they do not verify their e-mail. Vendors with an existing PaymentWorks account will be prompted to connect with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





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.



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.