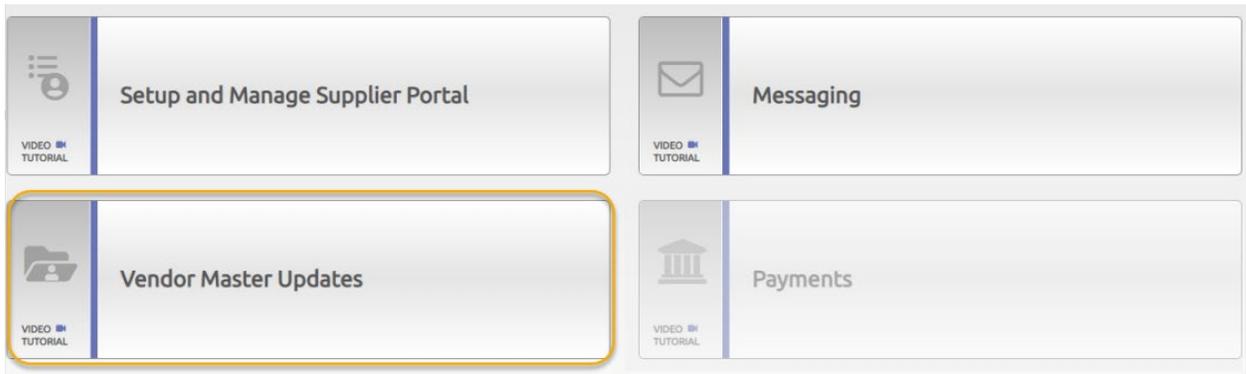


How to Set Up a Vendor in PaymentWorks

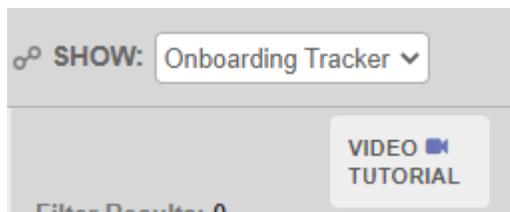
For University of Idaho employee use. Email acctpay@uidaho.edu for additional help.

1. How to Search for a vendor in PaymentWorks

- a. Login to the University of Idaho SSO site. Please email acctpay@uidaho.edu for the link.
- b. Click Vendor Master Update



Make sure SHOW Onboardings Tracker is on



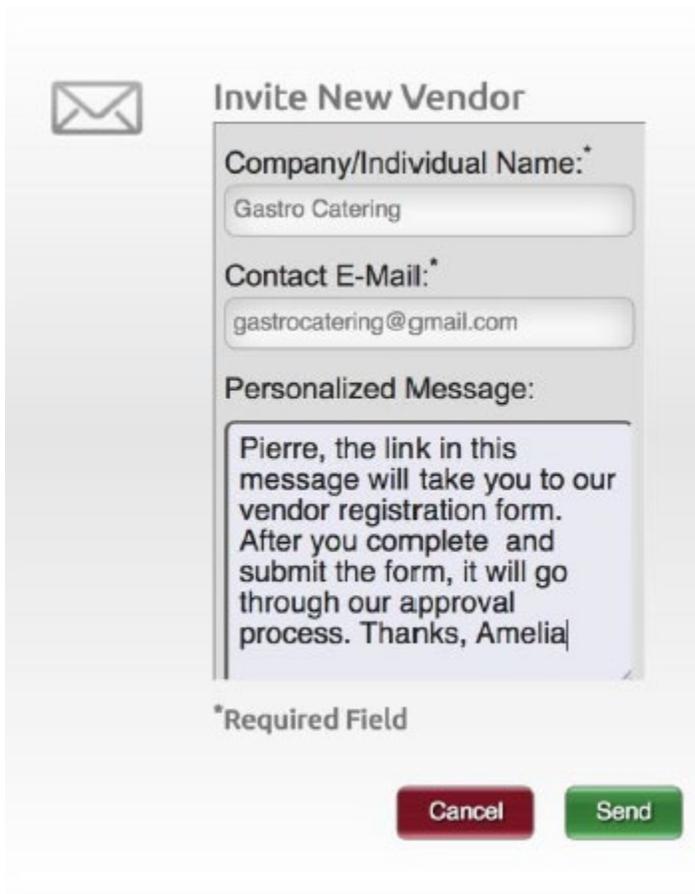
c. Click Send Invitation

The screenshot shows the PaymentWorks interface for 'New Vendors'. At the top, there is a 'SHOW: Onboardings' dropdown. Below this is a 'Filter Results' section with a 'Need help?' link. The filter section contains several input fields: 'Vendor Name', 'Vendor #', and 'Contact E-Mail', each with a magnifying glass icon. Below these are dropdown menus for 'Invitation Delivered', 'Account Created', 'Registration Form', and 'Source', all currently set to 'Unspecified'. There is also an 'Invitation Initiator' input field. At the bottom of the filter panel is a 'Clear Filters' button. Below the filter panel is a red-bordered button labeled 'Send Invitation...'. The footer of the page reads '© 2014 - 2017 PaymentWorks, Inc.'

d. Complete Invite information & click SEND

The screenshot shows the 'Invite New Vendor' form. It has a title bar with an envelope icon and the text 'Invite New Vendor'. The form contains the following fields: 'Company/Individual Name*', 'Contact E-Mail*', 'Verify Contact E-Mail*', 'Is this invitation to an individual or entity?' (with a dropdown menu showing 'Choose One'), and 'Description of Products/Services'. A legend at the bottom left indicates that an asterisk (*) denotes a 'Required Field'. At the bottom right, there are two buttons: 'Cancel' (red) and 'Send' (green).

- e. Adding Personal Messages to Invitations - PaymentWorks offers the ability for invitations to include a personal message from the sender (also referred to as the “Initiator”) to the prospective payee.



Invite New Vendor

Company/Individual Name:*
Gastro Catering

Contact E-Mail:*
gastrocatering@gmail.com

Personalized Message:
Pierre, the link in this message will take you to our vendor registration form. After you complete and submit the form, it will go through our approval process. Thanks, Amelia

*Required Field

Cancel Send

2. Vendor Invite Status

- a. Show: Onboarding Tracker shows invite status



Home New Vendors

SHOW: Onboarding Tracker

VIDEO TUTORIAL

Filter Results: 42 Records

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Onboardings Sort By: Date modified Descending Need help?

James Spader

INVITATION INITIATED 08/24/2022 12:37 PM

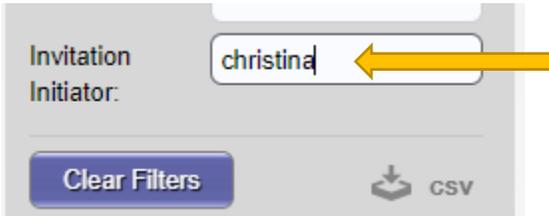
INVITATION EMAIL OPENED 08/24/2022 1:20 PM 10 days

Karen Robinson

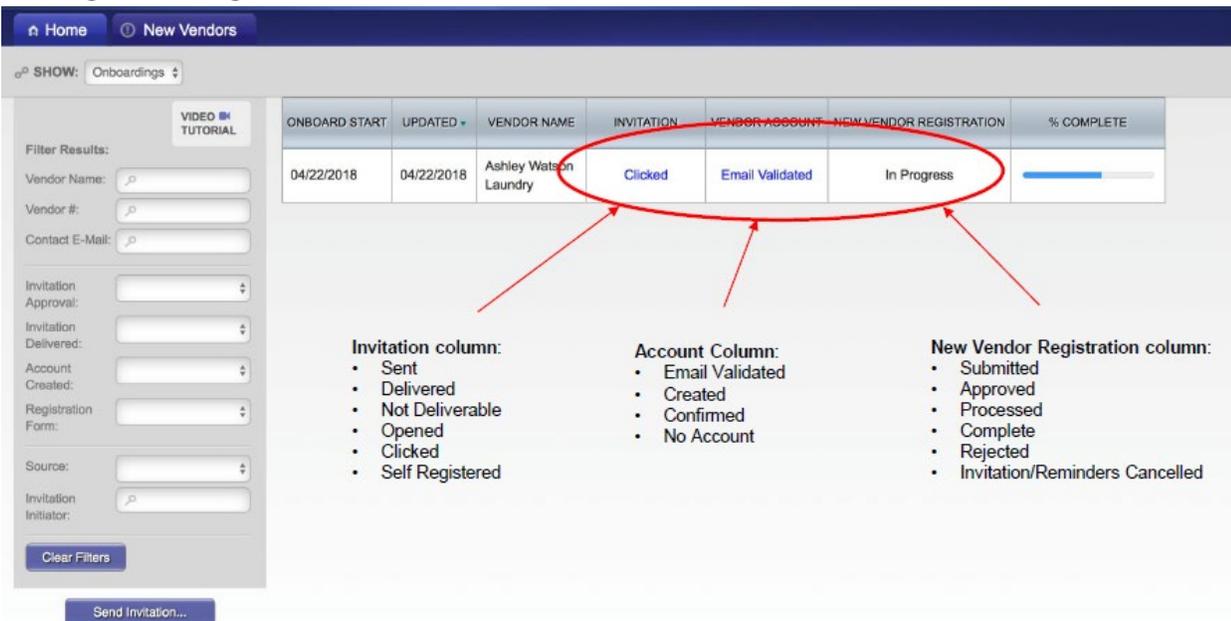
INVITATION INITIATED 08/24/2022 12:55 PM

INVITATION EMAIL OPENED 09/30/2022 9:05 AM

- b. You can search for only your invites, by adding your name in Invitation Initiator box at the bottom of the Filter Results:



3. Tracking Onboardings



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/22/2018	04/22/2018	Ashley Watson Laundry	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>

Invitation column:

- Sent
- Delivered
- Not Deliverable
- Opened
- Clicked
- Self Registered

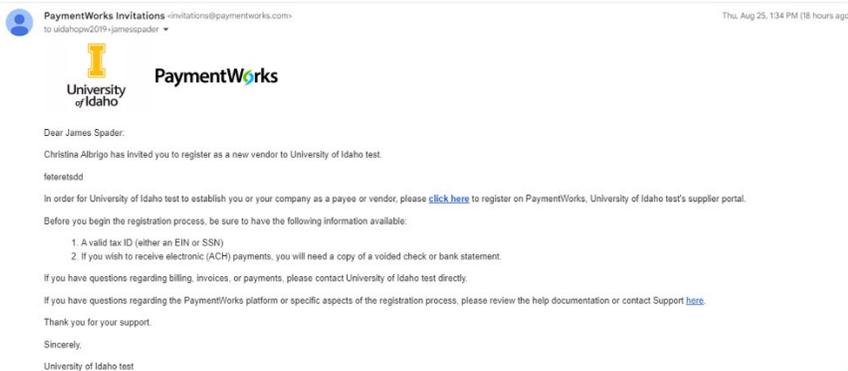
Account Column:

- Email Validated
- Created
- Confirmed
- No Account

New Vendor Registration column:

- Submitted
- Approved
- Processed
- Complete
- Rejected
- Invitation/Reminders Cancelled

4. Vendor Receives Email



PaymentWorks Invitations <invitations@paymentworks.com>
to: uidahopw2019@jamespader

Thu, Aug 25, 1:34 PM (18 hours ago)

 **PaymentWorks**

Dear James Spader:

Christina Albrigo has invited you to register as a new vendor to University of Idaho test.

feteratsdd

In order for University of Idaho test to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, University of Idaho test's supplier portal.

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 questions regarding billing, invoices, or payments, please contact University of Idaho test directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support [here](#).

Thank you for your support.

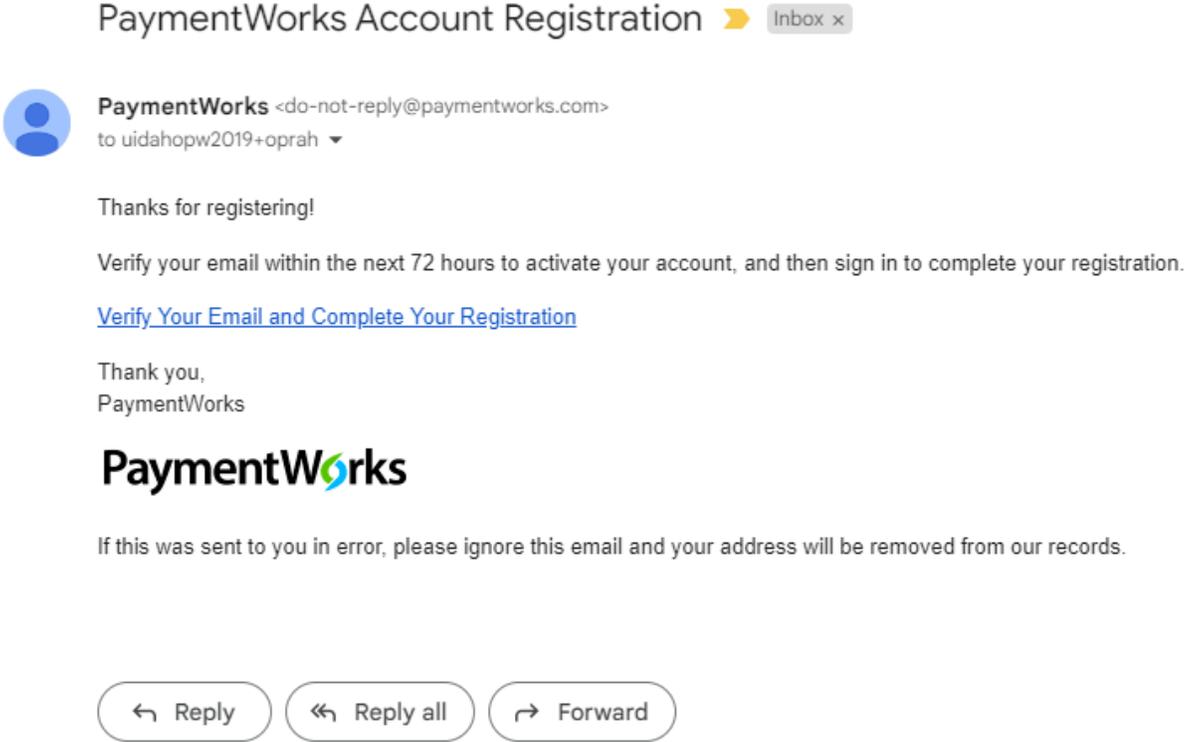
Sincerely,
University of Idaho test

PAYMENTWORKS USER GUIDE

- a. When Vendor clicks link in invitation email, it takes them to PW log in page where they click Suppliers Join Here



- b. Vendor will receive an email to validate their email.



- c. Once validated, they will log into www.paymentworks.com, complete online registration form and SUBMIT. Let vendor know someone from PW may call to validate the LAST FOUR of their bank account number. If left a message, they need to return the call as this is the last step in the process.

Important Notes for Foreign Vendors:

- Please email acctpay@uidaho.edu with **ANY** questions you have.
- Foreign vendors can't receive ACH payments, if vendor selects Direct Deposit in error, they are unable to add wire information that is needed. This may delay the registration process.
- The approval process takes longer for Foreign Vendors so plan accordingly.