



PaymentWorks User Manual

Sending and Tracking Invitations

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Sending and Tracking Invitations

1. Overview

Procurement and Payment Services (Procurement) has selected PaymentWorks as a tool to manage supplier information. The PaymentWorks platform creates efficiency in the process of obtaining business details and payment information from your vendors.

How Does PaymentWorks Work?

PaymentWorks is a platform through which Cornell University can “connect” with its new and existing vendors. Approved personnel can send invitations to new vendors so they can create an account and make a connection on PaymentWorks.

As an initiator in PaymentWorks, you can send out requests to prospective vendors so they can go through the registration process. You can do this through invitations that you send using the vendor’s e-mail address. Once you send an invitation, the vendor will have the opportunity to complete a New Vendor Registration form and submit its information. More details on this process are covered in Sections 3 and 4 of this document.

At this time, you will only be able to send invitations to domestic disbursement voucher (DV) vendors. If you send an invitation to a foreign DV vendor, the file will fail and that vendor will need to complete the paper form and IRS form W-8.

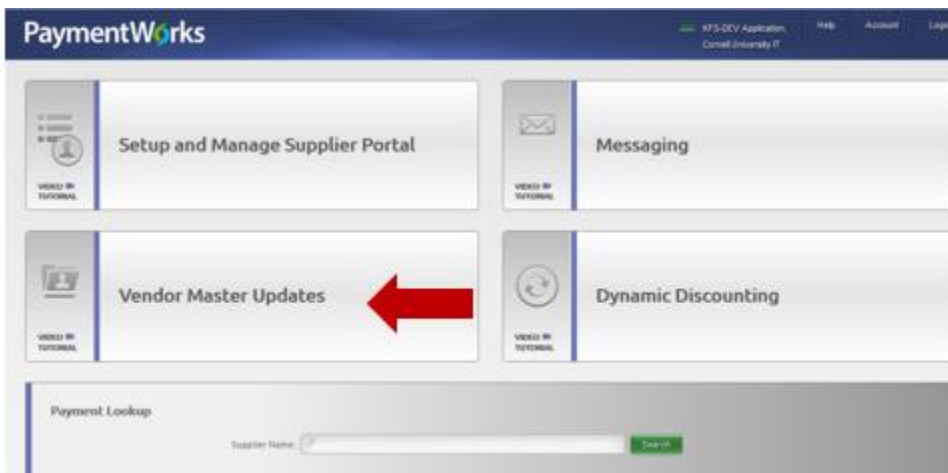
2. How to Set Up an Initiator Account

To set up your user account, log into PaymentWorks using this Cornell specific link:

www.paymentworks.com/login/saml/?idp=cornell

NOTE: Cornell University uses single sign-on (SSO) to access PaymentWorks. The link above take you to the PaymentWorks login page. When you login initially, your PaymentWorks account will be created. Procurement will then be able to assign your initiator role. Once the role has been assigned, you may proceed with the instructions below.

When you log in, the following screen will display:

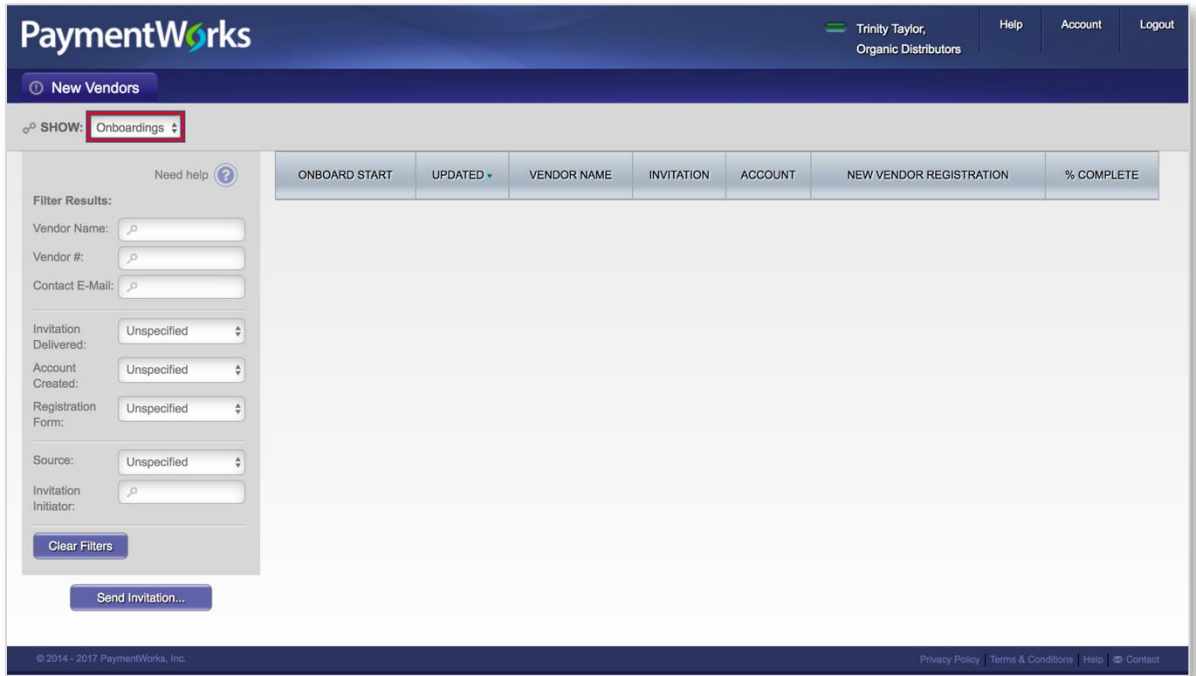


From the Home page, select Vendor Master Updates.

Depending on the permissions granted, you may be able to toggle between the “Onboardings” view and the “Requests” view by clicking where the red box is shown below.

- Onboardings is a record of invitations sent.
- Requests is a view of all completed and submitted registrations.

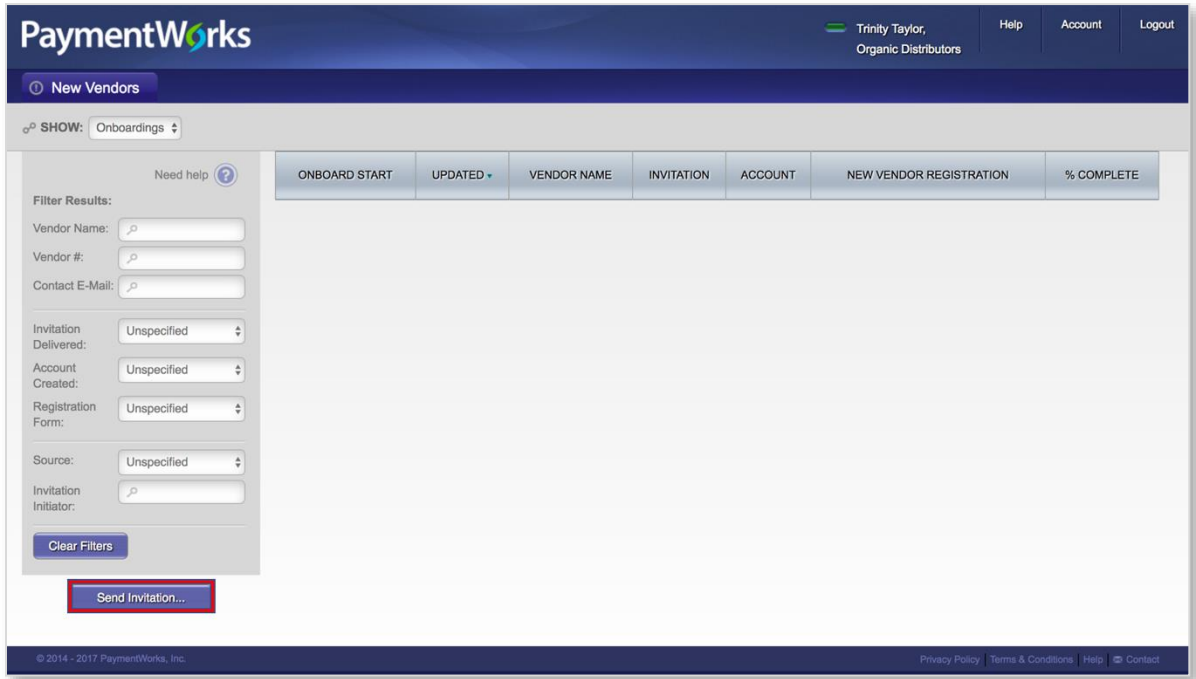
The Onboardings view will show you which vendors have been invited to register and the status of each.



You will be able to send and resend requests to vendors, track these requests, and filter results to look up specific vendors or onboarding statuses. These features are described in further detail in the sections below.

3. Sending Invitations

You can initiate the new vendor registration process by sending an invitation to the prospective vendor. You can do this by clicking on the **Send Invitation** button at the bottom of the left sidebar.



The screenshot below shows Cornell's invitation form.

The screenshot shows a form titled 'Invite New Vendor'. It has an envelope icon in the top left. The form contains several input fields: 'Company/Individual Name', 'Contact E-Mail', 'Verify Contact E-Mail', 'Initiator's Net ID', and 'Vendor Type' (a dropdown menu). Below these is a 'Personalized Message' field with a text area. At the bottom, there are 'Cancel' and 'Send' buttons. A legend indicates that an asterisk (*) denotes a required field.

Note: You may only invite domestic DV vendors. Only Procurement Agents may invite domestic purchase order (PO) vendors.

If you need a new PO vendor, please complete a requisition and provide the vendor's information on the form. The purchasing agent who processes your PO will send the invitation to the vendor.

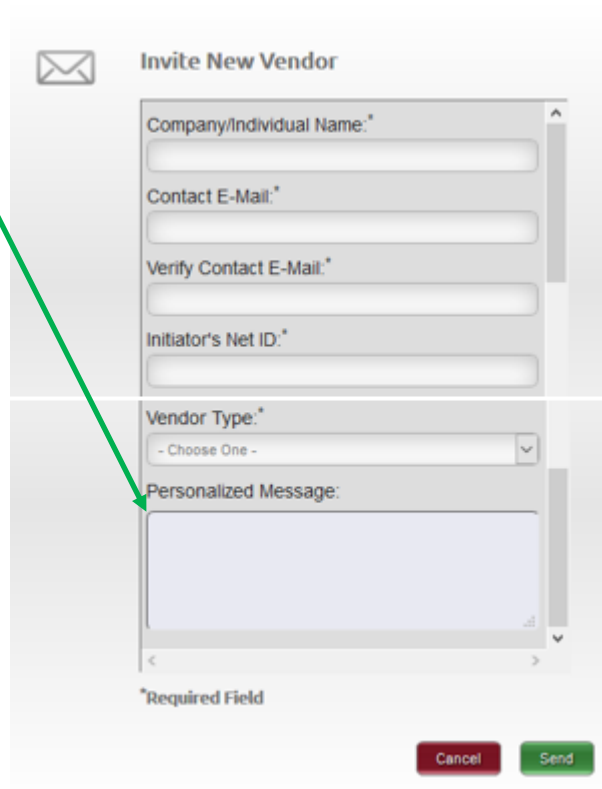
Adding Personal Messages to Invitations

PaymentWorks' invitations include a field for a customized personal message from the Initiator to the prospective vendor.

A "personalized message" text box is available at the bottom of the invitation form. The maximum length of a personal message is 280 characters.

Please remember to include your phone number and provide the vendor/payee with some information as to why you are paying them, e.g. honorarium for speaking to a class. You may also include a doc number if that make things easier for you and you have enough room in the field to include it.

The automated email will include your name and email address as entered in this invitation form.



The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form contains several required fields, each marked with an asterisk: "Company/Individual Name:", "Contact E-Mail:", "Verify Contact E-Mail:", "Initiator's Net ID:", and "Vendor Type:". The "Vendor Type:" field is a dropdown menu currently showing "- Choose One -". Below these is a large text area labeled "Personalized Message:". A green arrow points from the text in the first paragraph to this text area. At the bottom of the form, there is a red "Cancel" button and a green "Send" button. A legend below the form indicates that an asterisk denotes a "Required Field".

Viewing the Message

When the invitation has been sent, the personal message will be captured and displayed in the expanded record view of Onboardings, as shown below:

The screenshot displays the PaymentWorks Vendor Master Updates interface. The top navigation bar includes the PaymentWorks logo, a dropdown menu for 'Vendor Master Updates', and user information for Amelia Boynton, Waltham College. Below the navigation bar are tabs for Home, Vendor Profiles, Updates, New Vendors, and Reimbursements. The main content area is titled 'SHOW: Onboardings' and features a filter sidebar on the left with fields for Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. The main area shows a table of invitation records with columns for ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. The selected record is expanded to show 'Invitation Details' for 'Gastro Catering', including the initiator 'Amelia Boynton', vendor name 'Gastro', contact email 'tad+gastro@paymentworks.com', and dates '02/01/2018'. A personalized message is displayed in a red-bordered box: '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'. Below the message are buttons for 'Cancel Reminders' and 'Resend Invitation'. A table below the message shows the invitation history for two records, both dated 12/08/2017 and 12/07/2017, with status 'Clicked', 'Email Validated', and 'Submitted'.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
12/08/2017	12/08/2017	Recycled Cycles	Clicked	Email Validated	Submitted	<div style="width: 100%;"></div>
12/07/2017	12/07/2017	Coffee Bean, Inc.	Clicked	Email Validated	Submitted	<div style="width: 100%;"></div>

If you resend the invitation, the most recent message will appear in the expanded record, as shown above.

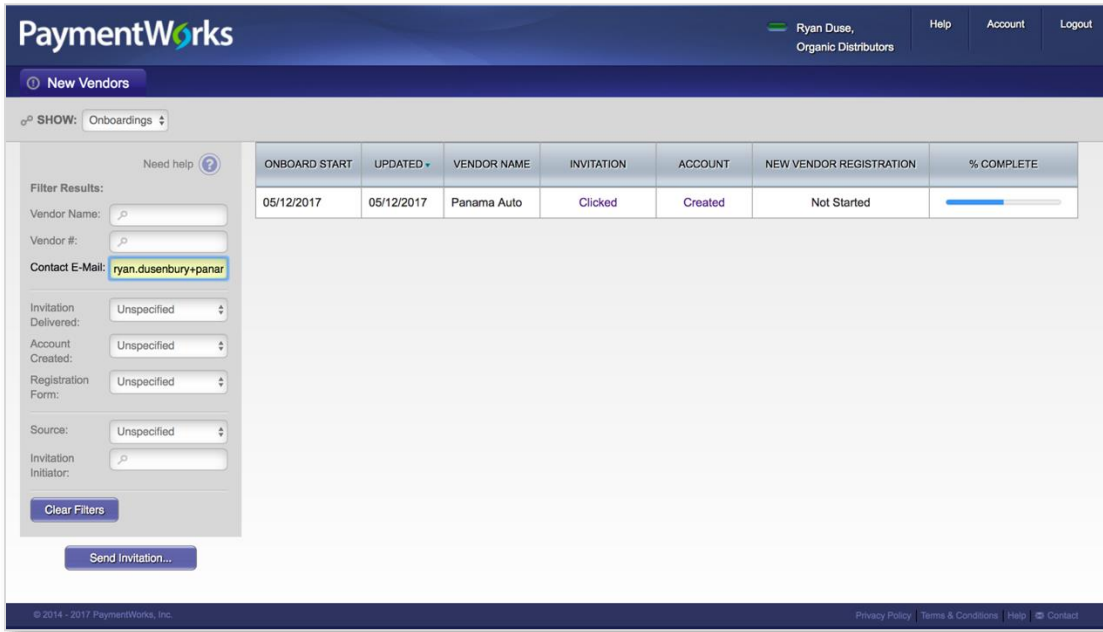
4. Tracking Invitations

The screenshot shows the PaymentWorks interface for tracking vendor onboarding. The top navigation bar includes the PaymentWorks logo, user information (Ryan Duse, Organic Distributors), and links for Help, Account, and Logout. Below the navigation bar, there is a 'New Vendors' section with a 'SHOW Onboardings' button circled in green. The main content area features a table of onboarding records and a filter panel on the left. The filter panel includes fields for Vendor Name, Vendor #, Contact E-Mail (highlighted in yellow), Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. A 'Clear Filters' button is located below the filter panel. The table displays columns for ONBOARD START, UPDATED, VENDOR NAME, INVITATION, ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. The table contains five rows of data, each with a progress bar indicating the completion status.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
05/12/2017	05/12/2017	Panama Auto	Delivered	No Account	Not Started	<div style="width: 25%;"></div>
05/12/2017	05/12/2017	Queen Elizabeth II	Clicked	Confirmed	Submitted	<div style="width: 75%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Clicked	Confirmed	Not Started	<div style="width: 25%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Cancelled	No Account	Not Started	<div style="width: 0%;"></div>
05/12/2017	05/12/2017	Headphones Distributor	Clicked	Confirmed	Not Started	<div style="width: 25%;"></div>

When you start sending invitations, they will appear as shown above on the **Onboardings** view. **This is the best place to check the status of your vendor.**

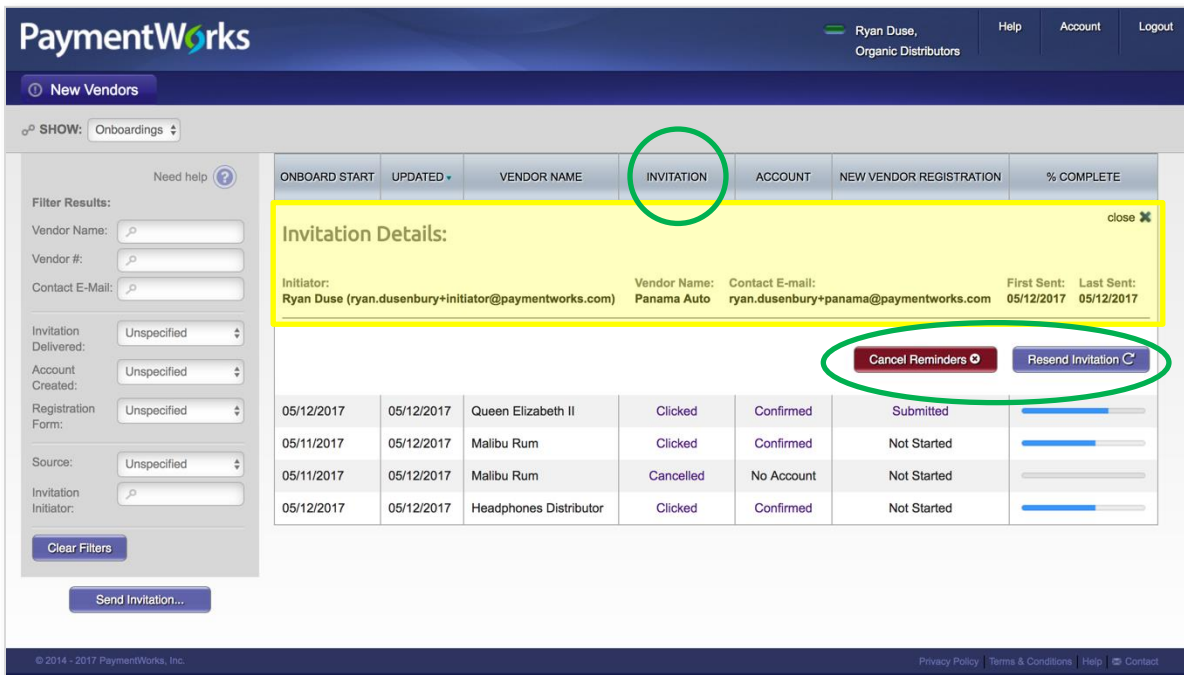
You can use the controls on the left side of the page to filter the list of new vendor onboardings. For example, if you wanted to look up the status of an invitation to the e-mail address `bobsmith@mail.com`, you can type that e-mail address in the Contact E-Mail field. If an invitation has gone out to that email address, the page will only display invitations that have gone out to that address.



Expanding Invitations

More information is available on each invitation by clicking the appropriate links displayed in various columns.

More Information Regarding the Invitation



When you click on a link in the Invitation column, you will be able to expand that invitation and view the details of the invitation that was sent.

These details include:

- Name and e-mail address of the initiator
- Name of the vendor, as you filled out in the invitation
- E-mail address of the vendor to which the invitation was sent
- Date the invitation was first sent
- Date the invitation was last sent (will only differ from First Sent if the invitation was resent)

If the prospective vendor has not clicked the invitation, you can resend the invitation and cancel future reminders to that vendor about completing their registration.

Invitation Details: close ✕

Initiator: Marcia O'Donnell (marciaodonnell17+test@gmail.com)	Vendor Name: MOTest302	Contact E-mail: marciaodonnell17+m test302@gmail.com	Initiated: 10/16/2018	Email Sent: 10/16/2018
---	----------------------------------	--	---------------------------------	----------------------------------

Custom Fields:

Initiator's Net ID : mo14

Vendor Type : Construction Contracts

[Cancel Reminders](#) [Resend Invitation](#)

When you click on the "Resend Invitation" button, you will see the invitation form again. You will have an opportunity to edit the e-mail address and/or name of the prospective vendor, as well as the Personalized Message. Once a vendor opens the e-mail, the option to Resend (as well as cancel reminders) is not available.



Resend New Vendor Invitation

Company/Individual Name:*

KME Test351

Contact E-Mail:*

emley13+test351@gmail.com

Verify Contact E-Mail:*

emley13+test351@gmail.com

Initiator's Net ID:*

kme44

Vendor Type:*

Award

Personalized Message:

If you have questions, please contact Karen Emley, 607-255-0818 or kme44@cornell.edu. This payment is for an award, doc #123456789.

Retain Previous Initiator

*Required Field

Cancel

Send

Note: Once you cancel reminders, you cannot re-enable them, but you can resend invitations.

More Information Regarding Vendors' Accounts

The screenshot shows the PaymentWorks 'New Vendors' dashboard. The 'ACCOUNT' column header is highlighted with a green circle. Below it, an 'Account Details' pop-up window is displayed, showing the following information:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
05/12/2017	05/12/2017	Headphones Distributor	Clicked	Confirmed	Not Started	<div style="width: 50%;"></div>
05/12/2017	05/12/2017	Queen Elizabeth II	Clicked	Confirmed	Submitted	<div style="width: 100%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Clicked	Confirmed	Not Started	<div style="width: 50%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Cancelled	No Account	Not Started	<div style="width: 0%;"></div>

The 'Account Details' window shows:

- User Name: Ryan D
- User E-mail: ryan.dusenbury+panama@paymentworks.com
- Company Name: Panama Auto
- Account created: 05/12/2017

The account column will show links, like in the Invitation column, but the statuses in this column differ. The Account column allows you to view the details your prospective vendor submitted to create its PaymentWorks account. These details include:

- Name on the account
- User's e-mail address
- Company name
- Date account was created

Important Note: A vendor needs to create a PaymentWorks account and submit 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. Details on statuses for each column are shown in the next subsection.

Onboarding Statuses

Possible Statuses in the Invitation column

- **Sent:** This acknowledges that the invitation was sent. If the date is more than a few days old, you should check to see if the vendor received the email. The vendor might have to check its Spam or Junk folder.
- **Delivered:** The invitation was delivered to the vendor's email server. In this status,

the recipient has not opened the email. If it remains in this status for long, the vendor might have to check its Spam or Junk folder.

- **Undeliverable:** The vendor's email server rejected the invitation. In this case, you should contact the vendor to verify the email address. If it is correct, tell the vendor to get its IT department to "white list" paymentworks.com, i.e., allow the PaymentWorks e-mail address to go through its server.
- **Opened:** The vendor has seen and opened the email, but has not yet clicked the link to begin the onboarding.
- **Clicked:** The vendor opened the email and followed the link to PaymentWorks. Please note that once a vendor clicks an invitation, you can no longer resend the invitation.
- **Self-Registered:** The vendor went to the Payer's Public landing page (www.paymentworks.com/company) and joined PaymentWorks from there. You should never see this as Cornell hides this landing page.

Possible Statuses in the Vendor Account column

- **No Account:** The vendor has not started the registration process.
- **Email Validated:** The vendor has started the registration process by clicking the link to verify their email address.
- **Registered:** The vendor created an account but has not submitted its vendor registration form.

Possible Statuses in the New Vendor Registration column

Note: You will not be able to click on the links in this column as the pages that are linked contain sensitive data, e.g., social security numbers. You will be able to see the status of your vendor and the KFS vendor number when the vendor has been fully processed.

- **Not Started:** The vendor received the email, but has not done anything with it.
- **In Progress:** The vendor has opened the registration form, but has not yet completed and submitted it.
- **Submitted:** The vendor has submitted the form but it hasn't been processed by Procurement. You would see these under New Vendor Requests as "Pending".
- **Processed:** The form has been processed and pulled down to KFS for review/approval.
- **Complete:** The form has been approved in KFS and pushed back up to

PaymentWorks. This is the same as status as “Connected” under New Vendor Requests.

- **Returned:** Procurement has sent the registration form back to the vendor for clarification or to correct an invalid entry.
- **Rejected:** The vendor reviewer has rejected the submitted form. It is something you should rarely see. This is the same status as “Rejected” under New Vendor Requests.
- **Invitation/Reminders Cancelled:** Someone from the Payer has clicked the “Cancel Reminders” link for that vendor. This could be the vendor reviewer or the vendor initiator.

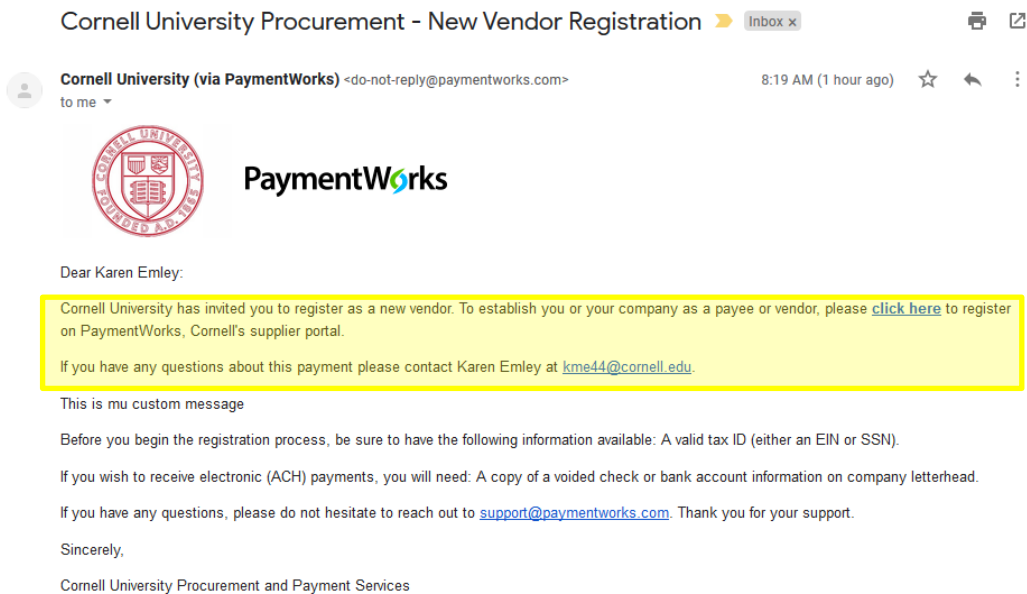
5. The NVR Process

The following section outlines the steps a vendor you have invited will take to register and connect with your organization on PaymentWorks. This is included for insight into the onboarding process, should you receive any questions from your vendor about completing their New Vendor Registration. A visual overview of the process is included below:



Step 1: The Vendor Receives the Invitation

First, the invitation the vendor receives will always include a special link at the top of the email and your name and email address:



Step 2: Joining PaymentWorks

When the vendor clicks the link in the invitation, the next screen invites them to join PaymentWorks. If the vendor already has a PaymentWorks account, the vendor can click the login link on the landing page and proceed to the registration form.



Cornell University

Before registering as a new Cornell University supplier, you first need to create a free PaymentWorks account.

[JOIN NOW](#)

Already registered on PaymentWorks? [Click here to login](#)

This is the simple PaymentWorks registration form required to create a vendor account.

Payees (Suppliers)
Join PaymentWorks for Free

Personal Information

First Name Last Name

Company Name

Title

Email

Telephone

Create Password

Password

Confirm Password

I agree to the [terms of service](#)

JOIN NOW

After joining PaymentWorks, the vendor will receive a second email enabling them to verify the account. Once they click the “Verify E-mail” button, as shown in the screenshot below, the vendor will be able to log in to the PaymentWorks account.

Note: A vendor cannot access the account if they do not verify the e-mail address.

PaymentWorks Account Registration ▶ Inbox x

PaymentWorks Support <support@paymentworks.com>
to emley13+test350 ▾

Thanks for registering!

Verify your email within the next 72 hours to activate your account.

[Verify Your Email](#)

Thank you,
PaymentWorks

PaymentWorks

If this was sent to you in error, please ignore this email and your address will be removed from our records.

After clicking the "Verify Your Email" link, the vendor will be prompted to sign in:



Registration Almost Complete!

Click the Sign In button below to access and complete your New Vendor Registration Form.

SIGN IN

1 2 3 4

Vendor Registration Step 3 of 4

This is the Sign In page:

Sign In

SIGN IN

[Forgot password?](#)

[Join PaymentWorks](#)

Step 3: The New Vendor Registration Form

After the vendor has joined PaymentWorks, confirmed the PaymentWorks account, and signed in, the vendor will see Cornell's new vendor registration form.

Vendors will use this form (sample screenshot below) to provide their business or personal profile information, including address, tax information such as Employer Identification Number (for businesses) or Social Security Number (for individuals), as well as an IRS W-9 form.

The Cornell vendor registration form also offers the prospective vendor the option to submit bank account information to automatically enable electronic payments (ACH payments).

Cornell University

New Vendor Registration



Please fill out and submit the following form. The information you provide will be submitted to Cornell University and you will be notified by email when your application is processed. Once you are approved as a new vendor of Cornell University, you will immediately be able to see the status of all invoices you have submitted to Cornell University.

All fields marked with a red asterisk (*) are required fields. All other fields are optional.

Business Details

For tax purposes are you an individual, sole proprietor or single-member LLC? Yes No

Country of Incorporation or Organization* United States of America

Business Legal Name:*
For tax purposes

EIN:*
9-digit number, no spaces or dashes

Confirm EIN*

After the form has been completed and submitted, the form will be pulled into KFS for review and approval by Procurement. Once this happens, the vendor's data will be pushed back to PaymentWorks and the connection process will be complete.

Note: If the vendor has submitted its bank information, the ACH enrollment will automatically be completed during the approval process in KFS.

This is what you will see in the Onboardings view after the vendor has submitted its registration form:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/02/2018	10/02/2018	Robert Stavins	Clicked	Email Validated	Submitted	<div style="width: 100%; height: 10px; background-color: green;"></div>
10/02/2018	10/02/2018	Friendly Ghosts	Clicked	Email Validated	Complete Vendor #: 91435	<div style="width: 100%; height: 10px; background-color: green;"></div>

Once the process is complete and the vendor is connected to PaymentWorks, you will see the vendor number in the Onboardings view.

PaymentWorks Vendor Master Updates Karen Emley-TEST, Cornell Procurement Help Account Logout

Home Vendor Profiles Updates New Vendors Reimbursements

SHOW: Onboardings

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/11/2018	10/11/2018	Andrews Woodworking 1	Clicked	Email Validated	Complete Vendor #: 91736	100%
10/11/2018	10/11/2018	Travis	Clicked	Email Validated	Complete Vendor #: 91737	100%

6. Managing a Vendor's Account

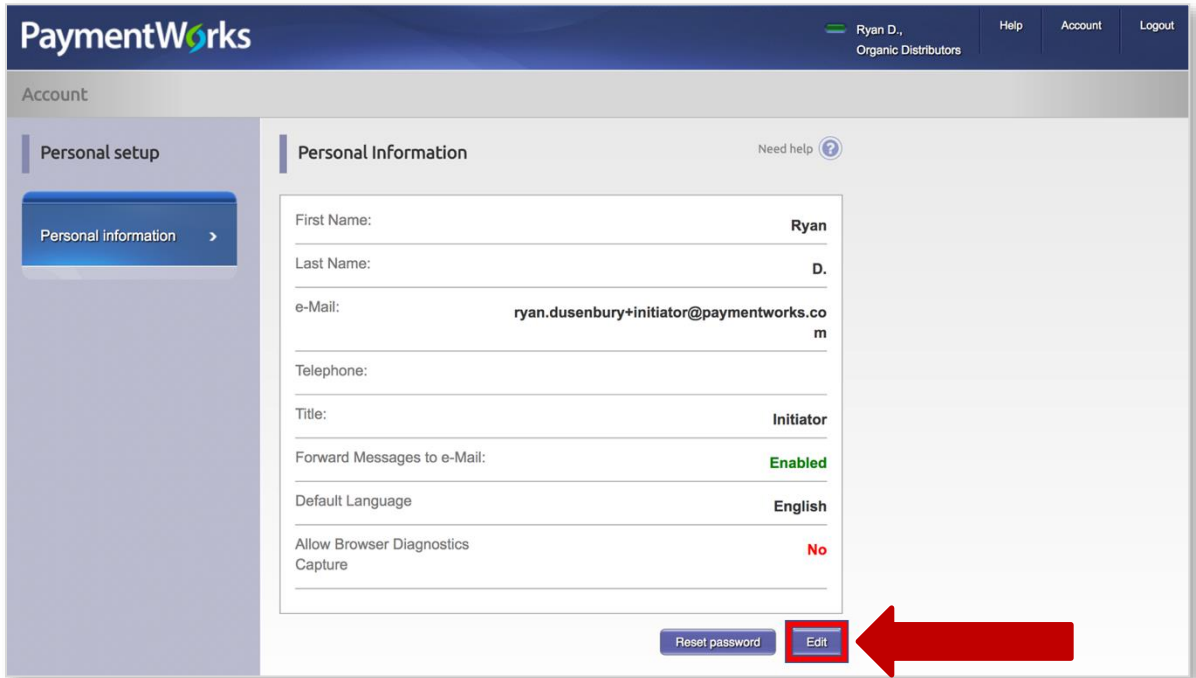
PaymentWorks Trinity Taylor, Organic Distributors Help Account Logout

New Vendors

SHOW: Onboardings

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
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At the top right of the homepage, your vendor will see "Account". Clicking this will allow the vendor to review or edit the information associated with the account and to reset the account password. To edit, the vendor can simply click the edit button shown below.



The vendor can change:

- First and Last Name
- The e-mail address associated with the PaymentWorks account
- Contact phone number
- Job title
- Permission to have messages forwarded to e-mail (recommended)
- Default Language
- Permission for PaymentWorks to capture browser information (recommended)

The edits must be saved to have the changes take effect in the system.

The screenshot shows the 'Personal Information' form in the PaymentWorks system. The form is titled 'Personal Information' and is located under the 'Personal setup' section. The form contains the following fields and values:

- First Name: Ryan
- Last Name: D.
- E-Mail: ryan.dusenbury+initiator@pay
- Telephone: (201) 555-5555 ext 123
- Title: Initiator
- Forward Messages to e-Mail:
- Default Language: English
- Allow Browser Diagnostics Capture:

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button, indicating that the changes must be saved to take effect.

Managing a Vendor's Account

- 1) Service center staff may only send invitations to DV vendors, not PO vendors.
- 2) Any vendor that needs to be converted from a DV vendor to a PO vendor should be handled manually by Procurement.
- 3) All child vendors will be created manually by the vendor reviewer in Procurement. Check the notes tab in KFS for your vendor to see if a child vendor is required.

7. Frequently Asked Questions

Question: What is the main change for me as a service center employee with regard to PaymentWorks?

Answer: The main change is simply to use the PaymentWorks invitation process to request a new vendor rather than the Automated Vendor Form (AVF) or the paper-based vendor application. You will be required to enter two additional pieces of information: the vendor's name and your NetID.

Question: Will current KFS vendors need invitations sent to them to be reloaded into PaymentWorks?

Answer: No, all vendor numbers will remain in the University's data file; only new vendor registrations need invitations sent to them.

Question: How will vendor updates be managed?

Answer: A new vendor onboarded through PaymentWorks will have the ability to update its own information through the PaymentWorks account. The vendor reviewer in Procurement will update the KFS vendor database, until such time as this feature is automated in KFS.

Question: Who should I contact if I, or my vendor, has a problem?

Answer: If you or your vendor has a problem with the form or using PaymentWorks, you should contact support@paymentworks.com. If the vendor has questions about the payment, they should contact the person who sent the invitation. If there is some other type of issue, the vendor initiator should call the Procurement Helpline at 607-254-5300.

Question: What if the vendor has a tax-related question?

Answer: You should refer the vendor to its own tax professional. We should not respond to these questions as we are not tax experts. Alternately, you may contact the Tax Office.

Question: What if my unit or department collects a W-9? Can I hand-key the vendor?

Answer: If it is a domestic DV vendor, you should notify the department to stop collecting W-9s. There will be a grace period through December 21, 2018, during which we will allow you to hand-key vendors. After Dec. 21, 2018, we will disapprove any hand-keyed domestic DV or PO vendors.

Question: What if my vendor requires a child vendor?

Answer: This will work the same way it does today. When your vendor is created in KFS, you should check the Notes and Attachments tab to see if there is a note that says "DBA

required” or “Child vendor required”. If you see language such as this, you will receive an email from the vendor reviewer after the child vendor has been set up. You need to wait for this email before processing your DV payment or purchase order.