PaymentWorks Payer Reference

Initiator Manual:
Sending and Tracking Invitations and Updates

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Part I: Sending and Tracking Invitations and Updates

1. Overview
Your organization’s Purchasing department 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 organizations’ vendors. In turn, vendors can submit and update their business information as necessary, as well as inquire about payments.

How Does PaymentWorks Work?
PaymentWorks is a platform through which your organization’s Purchasing department 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. Once vendors complete the registration and connection process, and when their registration is approved, they will be able to view invoice and payment related updates, while providing your Purchasing department with their latest profile information.

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 their information. More details on this process are covered in Sections 3 and 4 of this document.

If you have any questions about PaymentWorks, please contact the Purchasing department at your organization.

2. How to Access PaymentWorks
To access PaymentWorks, you will need to log into MyBGSU and select Purchasing from the Employee tab. In the Vendor Onboarding section, click on the PaymentWorks icon.

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Once you are logged in, the following screen will appear; click Vendor Master Updates.

You will 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 out.
- **Requests** is a view of all completed and submitted registrations
Now, 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 first selecting Onboardings in the SHOW field. Then click on the Send Invitation button at the bottom of the left sidebar.
The fields with an asterisk are required. Information in the personalized message field will be sent to the supplier. The Independent Contractor Agreement is required for all suppliers that qualify as an independent contractor. Be sure that the supplier has the fully executed contract (signed by the supplier and BGSU). The contract will need to be attached to the registration form. Information concerning Independent Contractors can be found on the Purchasing website: https://www.bgsu.edu/Purchasing/vendor-data-forms.html.
If you filled in the Personal Message field that has been enabled in your account, Initiators will see a new text box at the bottom of the dialog box displayed for providing invitation information.

**Viewing the Message**

If you fill in the Personalized Message field, when the invitation has been sent, this message will be captured and displayed in Onboardings, in the expanded record view, as shown below:
If you resend the invitation, the most recent message will appear in the expanded record, as shown above.

4. Tracking Invitations

When you start sending invitations, they will appear as shown above. 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

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bobsmith@mail.com, you can type that e-mail address in the Contact E-mail field. If an invitation has gone out to that 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.
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.

When you click on the “Resend Invitation” button, the same screen will appear as when you went to send the invitation the first time. Here you will have a chance to edit the e-mail address and/or name of the prospective vendor. Once a vendor opens the e-mail, the option to Resend (as well as cancel reminders) is not available.

Note: Once you cancel reminders, you cannot re-enable them, but you can re-send invitations.
More Information Regarding Account

The account column will show links, like in the Invitation column, but the statuses in this column are different than the statuses in the Invitation column. When you click on the link in the Account column, you can view the details your prospective vendor submitted to create their PaymentWorks account. These details include:

- Name on the account
- E-mail associated with the user
- Company of the user
- Date account was created

**Important Note**: A vendor needs to create a PaymentWorks account as well as 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**

To view these statuses click on the hyper link in the New Vendor Registration column.

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• **Invitation Pending**: All invitations are pending Purchasing's approval before the link is released.

• **Invitation Sent**: This just acknowledges that the invitation was sent. If the date is more than a day old, the email was probably not delivered. In these cases, you might need to check that the email address was correct.

• **Invitation 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 their Spam or Junk folder.

• **Invitation Not Deliverable**: The vendor’s email server rejected the invitation. This status is quite rare. In this case, we might have to try a different email address, or get 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**: The vendor has seen and opened the email, but they have not yet clicked the link to begin the onboarding.

• **Invitation Clicked**: The vendor opened the email and followed the link to PaymentWorks. This status shouldn’t appear for long, because the next step is simply to create a PaymentWorks account. Please note that once a vendor clicks an invitation, you can no longer re-send the invitation.

• **Invitation Undeliverable**: The vendor’s email address is incorrect. Open the invitation by clicking on undeliverable, select resend invitation to edit the invite with the correct email address and resend the invitation.

**Possible Requests Statuses in the New Vendor Registration column**

To view the Requests Statuses select Requests in the Show field.
• **Bank Validation Group** – The registration is being reviewed by PaymentWorks team for their validation process.

• **FRR Check Approval Group** – The registration is being reviewed by PaymentWorks for their validation process.

• **Sanctions List** – The registration is being reviewed by PaymentWorks for their validation process.

• **Vendor Screener (individual, sole proprietor or single member only)** – The registration is being reviewed by Purchasing for the proper documentation.

• **HR (individual/sole proprietor or single member only)** – The registration is being reviewed by the HR.

• **Controller (individual, sole proprietor or single member only)** – The registration is being reviewed by the Controller.

• **Vendor approver** – The registration is being reviewed by Purchasing.

• **Processed/Connected** – The vendor’s information has been connected in our system and the vendor has been assigned a vendor number. You can submit your non-catalog request for a PO to be issued or payment request in Falcons Purch.

**Onboarding Video**

Initiators can view a [video](#) on the onboarding process to invite vendors to register in the portal.

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**6. Managing your Account**

At the top right of the homepage, you will see “Account”. Clicking this will allow you to choose to be e-mailed messages.
Click on Edit

Check mark the box to Forward Messages to e-Mail and Save.
7. Vendor Updates

All vendor updates will need to be submitted in the PaymentWorks portal. The vendor will need to create their PaymentWorks account if they have not done so already and log in to request any updates.

Vendors can update:

- Name, address, phone & fax number
- Remit to location
- Sales, billing & credit card contact
- Payment information

Part II: Viewing Suppliers and Invoices

1. Viewing Suppliers

You can see all of the suppliers that have been uploaded to the system by clicking on the suppliers tab, under Set Up and Manage Supplier Portal > Suppliers. The sorting of the records can be modified by clicking on any one of the column headings, and you can search for a particular supplier by inputting the information in any of the columns available on the left.

In the connection column, you can see if the supplier has successfully connected with your company. A green dot will appear if the supplier has made a connection in PaymentWorks.
2. Viewing Invoices

You can view invoices that have been uploaded into the system by clicking on the invoices tab, under Set Up and Manage Supplier Portal. The sorting of the records can be modified by clicking on any of the column headings, and you can search for a particular invoice by inputting the information in any of the columns available on the left.