PaymentWorks

Vendor Registration Tool

March 2023
What is PaymentWorks?

• PaymentWorks is a cloud-based onboarding application for automating the vendor registration process
• Purchasing and Vendor Management are able to send email invitations to vendors to register online
• Vendors can register and maintain their own information through an assigned self-service account
• Currently utilized at a number of higher education institutions including Johns Hopkins, UC Davis, BYU, and now the University of Utah.
Why use PaymentWorks?

- Reasons for Transitioning:
  - PaymentWorks is a more stable, more supportable tool
  - This will eliminate many calls to respond to questions about invoice payments
  - A vendor may set up ACH payments automatically via the PaymentWorks registration form – it is now a one-step process!
  - The tool will provide self-service for vendors, including the ability to check payment status on outstanding invoices (anticipated FY24)
Vendor Types

- **PO vs ePR Vendors**
  - We will be able to use PaymentWorks for ePR and PO vendors

- **Domestic vs Foreign Vendors**
  - We are currently able to use the tool to register domestic vendors only

- **Other Vendor Types**
  - Eventually, we will be able to use the tool with foreign vendors and Refund & Reimbursement vendors. This will happen in future phases of the project
How to Access PaymentWorks

• Login via SSO
  
  – Make sure you are logged in to your University email system using your Unid and password

• Alternately, you can use this URL:

  https://www.paymentworks.com/app
Select the Vendor Master Updates tile in the bottom left
Dashboard shows all requests specific to your vendor invitations. Records show date, vendor name, status and onboarding progress.
## Vendor Invitation

### Vendor Invitation

<table>
<thead>
<tr>
<th>ONBOARD START</th>
<th>UPDATED</th>
<th>VENDOR NAME</th>
<th>INVITATION</th>
<th>VENDOR ACCOUNT</th>
<th>NEW VENDOR REGISTRATION</th>
<th>% COMPLETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11/2018</td>
<td>10/11/2018</td>
<td>Test again</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>12/06/2017</td>
<td>08/14/2018</td>
<td>Cooper Tire</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Returned</td>
<td></td>
</tr>
<tr>
<td>01/02/2018</td>
<td>03/18/2018</td>
<td>Odwalla's Catering</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td>01/02/2018</td>
<td>03/18/2018</td>
<td>Monsignor Lighting</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Complete Vendor #: 32016</td>
<td></td>
</tr>
<tr>
<td>01/02/2018</td>
<td>03/18/2018</td>
<td>Great Shots Photography</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Complete Vendor #: 32015</td>
<td></td>
</tr>
<tr>
<td>01/02/2018</td>
<td>03/18/2018</td>
<td>Coffee Bean, Inc.</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Complete Vendor #: 32001</td>
<td></td>
</tr>
<tr>
<td>01/02/2018</td>
<td>03/18/2018</td>
<td>Tool House</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>Complete Vendor #: 32014</td>
<td></td>
</tr>
</tbody>
</table>

**Click Send Invitation button**
 Invite New Vendor

1. Complete the invitation with the vendor’s name, email and your Net ID
2. Select DV vendor type (do NOT select PO vendor) and add a personal message that MUST include your phone number
3. Then click Send
The Vendor Receives the Invitation Email

The Vendor begins registration via their invitation email link.
• Vendor will create an account through the link and follow the steps to register.

• There is no charge to the vendor to register or use this tool.
• Vendor completes the online application process

• The form is currently customized for all domestic ePR and PO vendors doing business with University of Utah

Vendor completes the required form entries
• The end user has a dashboard showing all his/her vendor invitations with status updates.
• When the vendor is fully registered, the University vendor number will appear in the PaymentWorks dashboard New Vendor Registration column.

When fully approved and onboarded, the vendor number will appear in your dashboard.
Click the links at any time for more information for onboarding status.
Utilizing Your Dashboard

• If you see a vendor has not submitted the registration form, you can resend the invitation. PaymentWorks also sends reminders automatically to vendors.

If an email invitation is delivered, but no account was created, you can resend invitation.

<table>
<thead>
<tr>
<th>Date</th>
<th>Date</th>
<th>Vendor Name</th>
<th>Contact Email</th>
<th>Initiated</th>
<th>Email Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/18/2018</td>
<td>07/18/2018</td>
<td>Gaylord Library Supplies Inc</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/18/2018</td>
<td>07/18/2018</td>
<td>Henry Schein Dental</td>
<td><a href="mailto:lockecraig3+34@gmail.com">lockecraig3+34@gmail.com</a></td>
<td>07/18/2018</td>
<td>07/18/2018</td>
</tr>
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</table>

Resend Invitation
**Question**: What is the main change for me as a purchasing 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 Vendor Information Form or the paper-based vendor application.

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

**Answer**: No, all vendor numbers will remain in the University’s PeopleSoft 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 Vendor Management will update the PeopleSoft vendor database, until such time as this feature is automated.
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, the vendor should contact the person who sent the invitation. If there is some other type of issue, the vendor initiator should call the Purchasing Helpline at 801-581-7241 and ask for Vendor Management Team assistance.

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

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

• Questions for vendor onboarding can be sent to vendor@purchasing.utah.edu.

• Support for Supplier questions is provided by PaymentWorks. Suppliers may contact support@paymentworks.com for assistance.