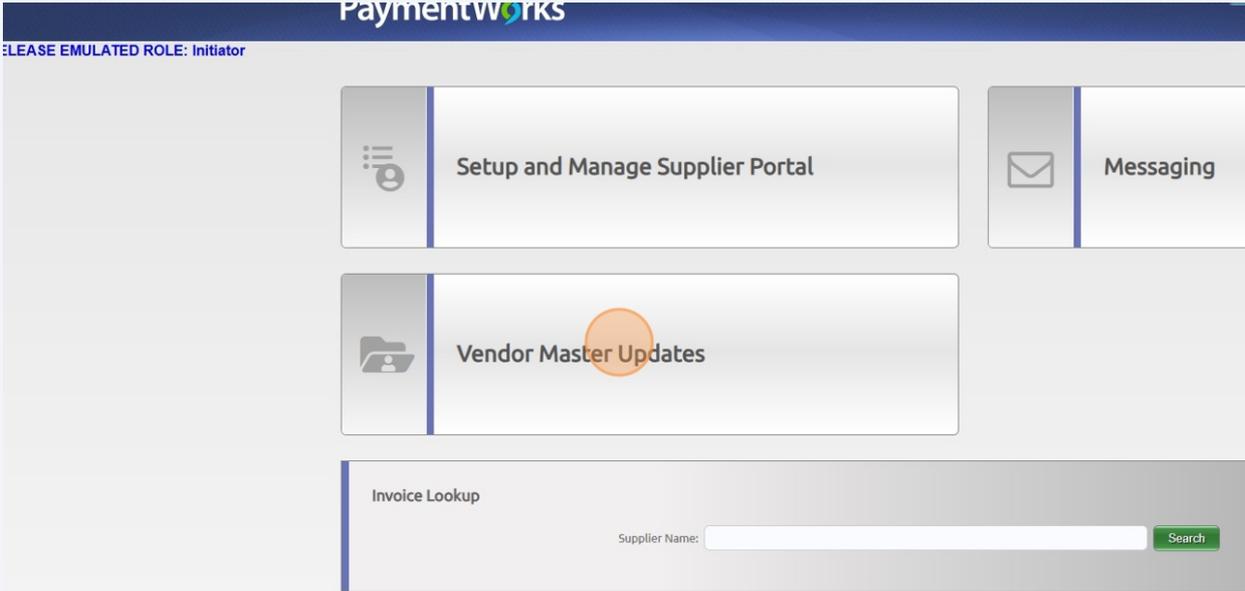


Inviting New Vendors in PaymentWorks System

1 PaymentWorks is accessed from the Finance bucket in WesPortal. Once logged in, click "Vendor Master Updates"



2

This will default to the "Vendor Profiles" which displays all of the connected vendors. Note: the best place to see if a supplier is already created is in Workday. Simply type the name of the supplier in the Workday search field. If a supplier is not set up, send them an invitation by clicking the "New Vendors" tab.

PaymentWorks Vendor Master Updates

Home Vendor Profiles Updates **New Vendors**

Connected Vendors with Company Profiles Record Count: 17

	Vendor Number: SU-013374 Site Code: ADDRESS_REFERENCE-9-1159573
Bank of America	Vendor Number: SU-99131
Bank of New York Mellon	Vendor Number: SU-99133

3

Click "Send Invitation..."

Account Created: [dropdown]
Registration Form: [dropdown]
Show Cancelled Only:
Show Easy Cancel:
Source: [dropdown]
Invitation Initiator: [dropdown]
Invitation sent: All Dates [dropdown]
Clear Filters [button] csv [button]
Send Invitation... [button]

Betty Boop	INVIATION INITIATED 03/12/2025 10:40 AM	EMAIL VERIFIED - INVITATION RECEIVED 03/12/2025 10:41 AM
Gulf Breeze Soaps	INVIATION INITIATED 03/12/2025 10:49 AM	EMAIL VERIFIED - INVITATION RECEIVED 03/12/2025 10:50 AM
Tom Cruise	INVIATION INITIATED 03/11/2025 11:06 AM	EMAIL VERIFIED - INVITATION RECEIVED 03/11/2025 11:39 AM
Saint Patrick	INVIATION INITIATED 03/17/2025 4:47 PM	EMAIL VERIFIED - INVITATION RECEIVED 03/17/2025 4:50 PM
Adam Sandler	INVIATION INITIATED 03/11/2025 11:30 AM	EMAIL VERIFIED - INVITATION RECEIVED 03/11/2025 11:30 AM

4

Type the Supplier's Name in the "Company/Individual Name" field. Under "Contact Email" type the name of the person that will receive the email request to complete the onboarding process. Under "Description of Goods and Services" simply provide a brief description. Examples are "speaker, goods, service contract etc". Initiator information is your information, the person in the department completing this form.

PaymentWorks

Vendor Master Updates

Valerie Nye, Wesleyan University (Test)

Home Vendor Profiles Updates New Vendors

SHOW: Onboarding Tracker

Filter Results: 40 Records

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Show Cancelled Only

Show Easy Cancel

Source:

Invitation Initiator:

Invitation sent: All Dates

Need help?

✉ Invite New Vendor

Description of Goods and Services:

Initiator Name (first and last)*

Initiator Email*

Initiator Department*

Initiator Phone Number*

*Required Field

Cancel Send

Gulf Breeze Soaps

INVITATION INITIATED 03/12/2025 10:49 AM

EMAIL VERIFIED - INVITATION RECEIVED 03/12/2025 10:50 AM

ONBOARDING 04/21/23 Vendor Num

5 Under "Reason for inviting this supplier" select the option that best applies.

PaymentWorks Vendor Master Updates Valerie Nye, Wesleyan University (Test) Help

Home Vendor Profiles Updates New Vendors

SHOW: Onboarding Tracker Need help?

Filter Results: 40 Records

Vendor Name: Vendor #: Contact E-Mail: Invitation Approval: Invitation Delivered: Account Created: Registration Form: Show Canceled Only: Show Easy Cancel: Source: Invitation Initiator: Invitation sent: All Dates

Invite New Vendor

Finance

Initiator Phone Number:* 860-685-3192

Reason for inviting this supplier.* Product and Service

Personalized Message:

*Required Field

Cancel Send

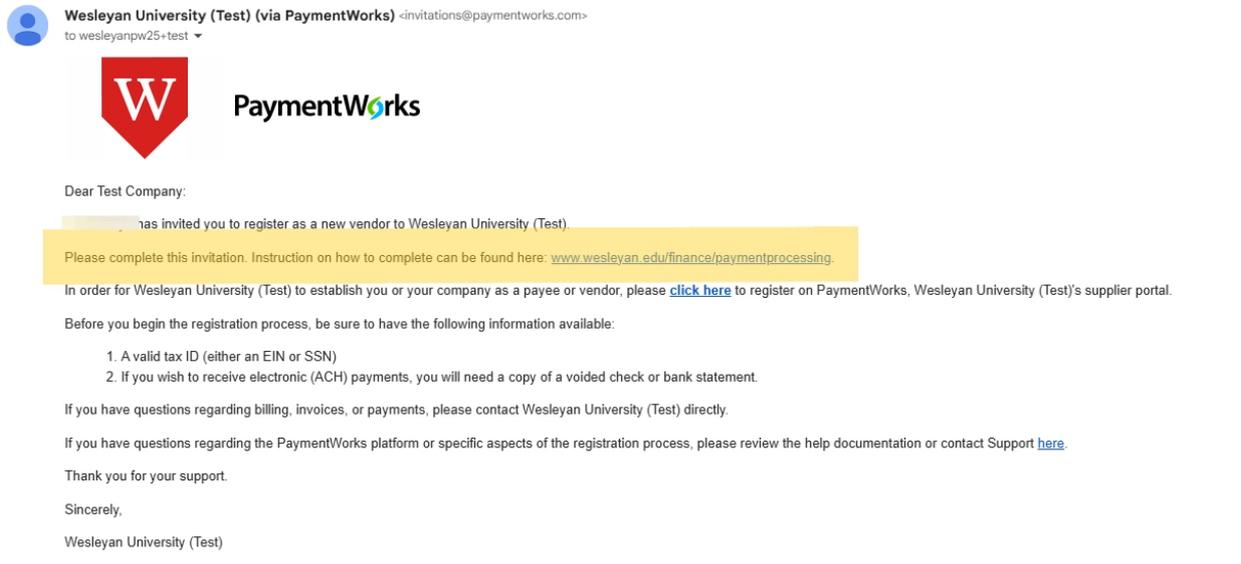
Gulf Breeze Soaps

INVITATION INITIATED 03/12/2025 10:49 AM

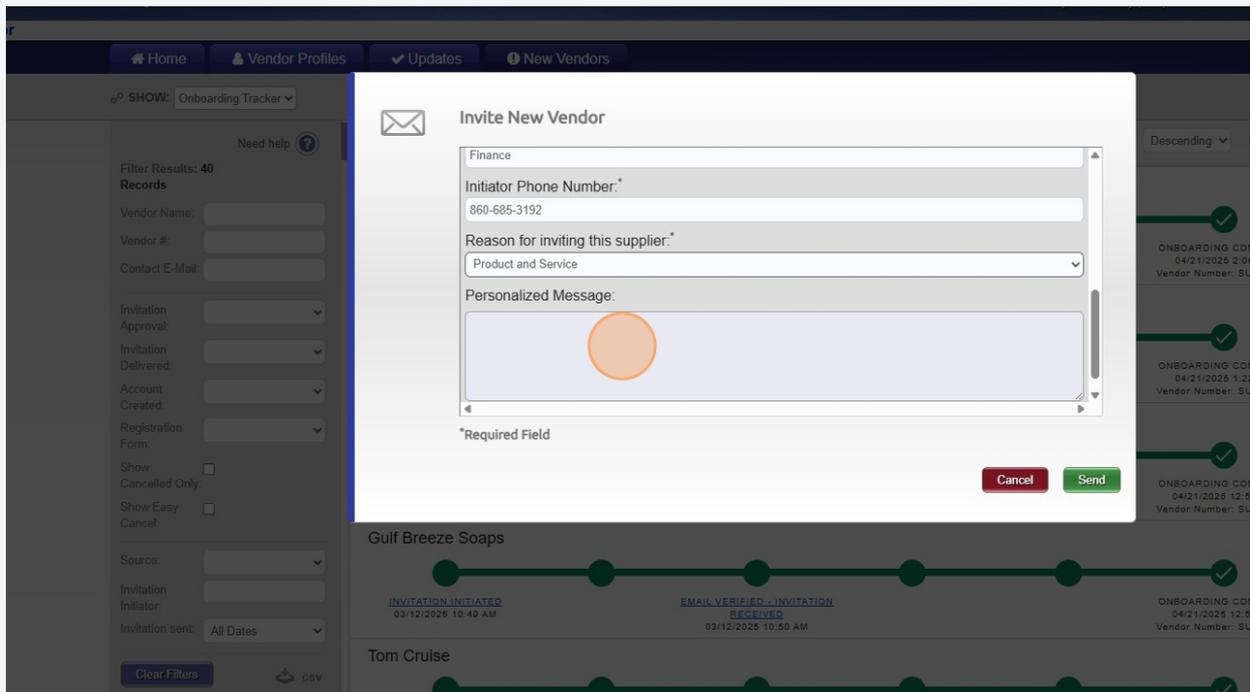
EMAIL VERIFIED - INVITATION RECEIVED 03/12/2025 10:50 AM

ONBOARDING CO 04/21/2025 12:50 AM Vendor Number: SU

6 The next field provides the ability to add a personalized message to the email. The personalized message will be displayed in this section of the standardized email.



7 Type a "Personalized Message:"

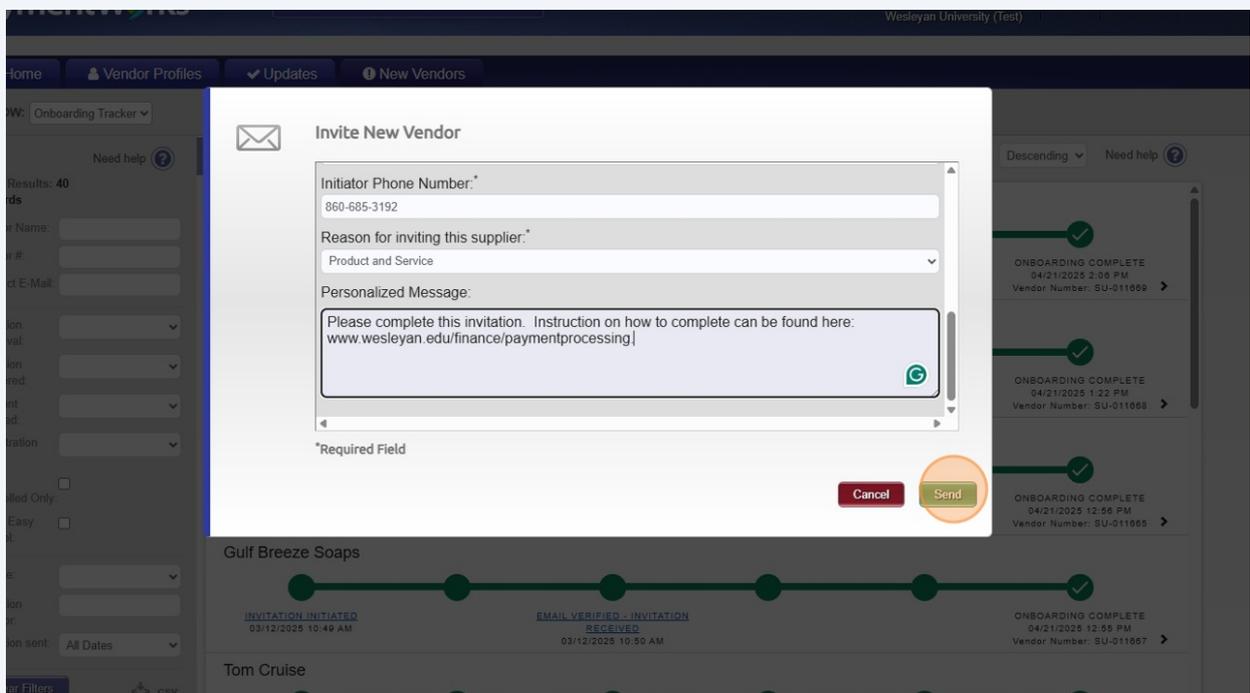


The screenshot shows a web application interface for inviting new vendors. A modal window titled "Invite New Vendor" is open, displaying a form with the following fields:

- Finance (dropdown menu)
- Initiator Phone Number: 860-685-3192
- Reason for inviting this supplier: Product and Service (dropdown menu)
- Personalized Message: A text area containing a large orange circle as a placeholder.

At the bottom of the form, there is a red "Cancel" button and a green "Send" button. A "*Required Field" label is visible below the text area. The background shows a list of vendors with onboarding progress indicators.

8 Click "Send"



The screenshot shows the same "Invite New Vendor" form, but now the "Personalized Message" field is filled with the text: "Please complete this invitation. Instruction on how to complete can be found here: www.wesleyan.edu/finance/paymentprocessing". The "Send" button is highlighted with a large orange circle, indicating it should be clicked. The background shows the vendor list with updated onboarding progress indicators.

9 Click "Ok"

The screenshot shows the 'Vendor Master Updates' page in a web application. A notification dialog box is displayed in the foreground, stating: 'Your invitation has been sent to Test Company at wesleyanpw25+test@gmail.com'. The dialog box has a green 'Ok' button. In the background, a table lists vendor onboarding progress for 'Test Company', 'Box Nation', and 'Boop'. Each row shows a progress bar with five steps: 'REGISTRATION INITIATED', 'EMAIL VERIFIED - INVITATION RECEIVED', 'ONBOARDING COMPLETE', and two intermediate steps. The 'ONBOARDING COMPLETE' step is marked with a green checkmark. The table also includes columns for dates and vendor numbers.

 After the invitation is sent, the initiators will receive email notifications at every step of the process. You can configure the notifications in the Account setup.

The screenshot shows the 'PaymentWorks' Account Management page. The 'Account' tab is selected in the top navigation bar. The left sidebar contains 'Personal setup' and 'Administrator setup' sections. Under 'Personal setup', the 'Manage Notifications' option is highlighted with a red box. The main content area is titled 'Manage Notifications' and contains a list of notification settings. Each setting has a toggle switch and a status indicator ('Enabled' or 'Disabled').

Notification	Status
Notify me when invitations I send are approved:	Disabled
Notify me when invitations I send are rejected:	Disabled
Notify me when invitations I send are received by my payee:	Enabled
Notify me if an invitation I send is cancelled:	Enabled
Notify me when a payee I invite submits their registration:	Enabled
Notify me when a payee I invite resubmits their registration:	Enabled
Notify me when a payee I invite has their registration rejected:	Enabled
Notify me when a payee I invite has their registration returned:	Enabled
Notify me when a payee I invite has their registration approved:	Enabled
Notify me when a payee I invite is fully onboarded:	Enabled
Notify me when invitations I send cannot be delivered:	Enabled

An 'Edit' button is located at the bottom right of the notification settings area.



You can also see the status of the invitation in the "Onboardings" dashboard located in the "Vendor Master Updates" tile and the "New Vendors" tab. This list can be filtered using any of the criteria on the left of the panel. It is recommended that you filter for any you have initiated by putting your name in the "Invitation Initiator" field.

The screenshot displays the PaymentWorks interface. At the top, the 'Vendor Master Updates' dropdown menu is highlighted with a red box. Below the navigation bar, the 'New Vendors' tab is also highlighted with a red box. The main content area is titled 'Onboardings' and shows a list of records for 'Test Company'. Each record has a progress bar with stages: 'INVITATION INITIATED', 'EMAIL VERIFIED - INVITATION RECEIVED', and 'ONBOARDING COMPLETE'. The 'Source' field in the filter panel on the left is highlighted with a red box.

Vendor Name	Invitation Initiated	Email Verified - Invitation Received	Onboarding Complete	Vendor Number
Test Company	04/25/2025 2:01 PM	04/25/2025 2:14 PM		
	04/01/2025 4:54 PM	04/01/2025 5:03 PM	04/21/2025 2:08 PM	SU-011659
	04/01/2025 2:29 PM	04/01/2025 2:33 PM	04/21/2025 1:22 PM	SU-011658
	03/12/2025 10:40 AM	03/12/2025 10:41 AM	04/21/2025 12:55 PM	SU-011655
	03/12/2025 10:49 AM	03/12/2025 10:50 AM	04/21/2025 12:55 PM	SU-011657