

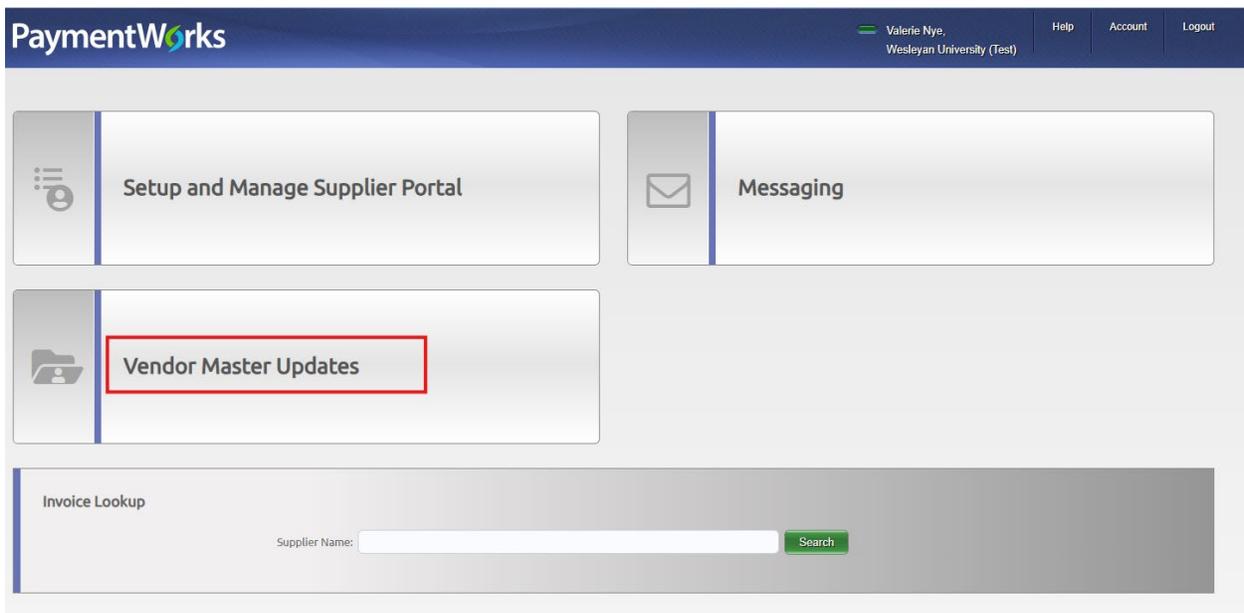
# PaymentWorks Quick Reference Guide

## Glossary of Terms:

- **Initiator** – person sending the invitation to the vendor. Typically the department Administrative Assistant but can be any Workday Cost Center Finance Specialist.
- **Invitation** – the email that the vendor receives with a link to set up a PaymentWorks account and register as a vendor with Wesleyan.
- **NVR** – New Vendor Registration – the completed form that is used to create a Workday Supplier record.
- **Onboarding Tracker** – the PaymentWorks panel that visually displays the status of the supplier onboarding.
- **Vendor** – Term used interchangeably with the Workday Supplier term.
- **Vendor Master Updates** – the PaymentWorks home page tile that will be the primary place for initiators to view and manage their supplier onboardings.

## Login using Single Sign On

From the Home page, select Vendor Master Updates.



Send an email invitation from the Vendor Master Updates page.

SHOW: Onboarding Tracker

Need help ?

Filter Results: 31 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

Clear Filters

csv

Send Invitation...

## Onboardings

[REDACTED]		<a href="#">INVITATION INITIATED</a> 04/02/2025 8:42 AM	<a href="#">EMAIL VERIFIED - INVITATION RECEIVED</a> 04/02/2025 8:47 AM
[REDACTED]		<a href="#">INVITATION INITIATED</a> 04/01/2025 4:54 PM	<a href="#">EMAIL VERIFIED - INVITATION RECEIVED</a> 04/01/2025 5:03 PM
[REDACTED]		<a href="#">INVITATION INITIATED</a> 04/01/2025 2:29 PM	<a href="#">EMAIL VERIFIED - INVITATION RECEIVED</a> 04/01/2025 2:33 PM
[REDACTED]		<a href="#">INVITATION INITIATED</a> 03/21/2025 2:34 PM	<a href="#">EMAIL VERIFIED - INVITATION RECEIVED</a> 03/21/2025 2:38 PM
[REDACTED]		<a href="#">INVITATION INITIATED</a> 03/17/2025 4:47 PM	<a href="#">EMAIL VERIFIED - INVITATION RECEIVED</a> 03/17/2025 4:50 PM

Complete the invitation:



## Invite New Vendor

Company/Individual Name:\*

This field is required.

Contact E-Mail:\*

Verify Contact E-Mail:\*

Description of Goods and Services:\*

Initiator Name (first and last):\*

Initiator Email:\*

Initiator Department:\*

Initiator Phone Number:\*

Reason for inviting this supplier:\*

- Choose One -



Personalized Message:

You will receive the following notifications throughout the process. Since we do not require invitation approval, we suggest disabling the first two. You can manage the notifications [here](#):

PaymentWorks Account Management Valerie Nye, Wesleyan University (Test) Help Account

Account

Personal setup

Personal information

Manage Notifications

Administrator setup

Manage Roles

Manage Approvals

Company Information

Manage Notifications

Need help ?

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

Edit

Here is the email they will receive.

Wesleyan University (Test) (via PaymentWorks) <invitations@paymentworks.com>  
to wesleyanpw25+playerpiano

 PaymentWorks

Dear Player Piano:

Valerie Nye has invited you to register as a new vendor to Wesleyan University (Test).

This is how the personalized message appears in the email.

In order for Wesleyan University (Test) to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Wesleyan University (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 Wesleyan University (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,  
Wesleyan University (Test)

Reply Reply all Forward

## Checking the onboarding tracker

The screenshot displays the PaymentWorks Vendor Master Updates interface. At the top, the 'Vendor Master Updates' dropdown menu is highlighted with a red box. Below it, the 'New Vendors' tab is also highlighted with a red box. The 'SHOW: Onboarding Tracker' dropdown is highlighted with a red box. The main content area shows the 'Onboardings' section for 'Player Piano'. A timeline indicates two events: 'INVITATION INITIATED' on 04/03/2025 at 4:50 PM and 'INVITATION EMAIL OPENED' on 04/03/2025 at 4:57 PM. On the left side, there are filter options for 'Vendor Name', 'Vendor #', and 'Contact E-Mail', along with a 'Filter Results: 32 Records' indicator. The 'Sort By' options are 'Date modified' and 'Descending'.

When you start sending invitations, they will appear as shown above. You can use the filter options 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 email address bobsmith@mail.com, you can type that email address in the Contact email field. If an invitation has gone out to that address, the page will only display the invitation that has been sent to that email address. You can also type any portion of the Vendor Name. Do not use the “invitation approval” filter as we do not have approvals turned on for invitations so there will not be any pending invitations. But you can see all of yours by putting your name in the “Invitation initiator” field.

Need help 

Filter Results: **10**  
**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:

---

[Clear Filters](#)  [csv](#)

[Send Invitation...](#)

More information for each invitation can be found by clicking on any of the status links along the progress bar in the invitation view. Additionally, the arrow to the far right lower corner of the invitation will also expand the invitation detail level. The Invitation detail view

will display information in three sections if the payee has created their account or two sections if they have not yet responded.

Payee has responded, created an account:

**Gillian Owens**

[INVITATION INITIATED](#)  
03/01/2023 9:34 AM

[EMAIL VERIFIED - INVITATION RECEIVED](#)  
03/01/2023 9:36 AM

[REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW](#)  
03/01/2023 10:08 AM  
1 hour

**PROGRESS**      **INVITATION DETAIL**      **ACCOUNT INFO**

**Onboarding Progress**

[INVITATION INITIATED](#)  
Initiated by: Procurement User (portroyalpw2019+procurement@gmail.com)  
03/01/2023 9:34 AM

[INVITATION APPROVED & SENT](#)  
Approved By: Procurement User (portroyalpw2019+procurement@gmail.com)  
03/01/2023 9:34 AM

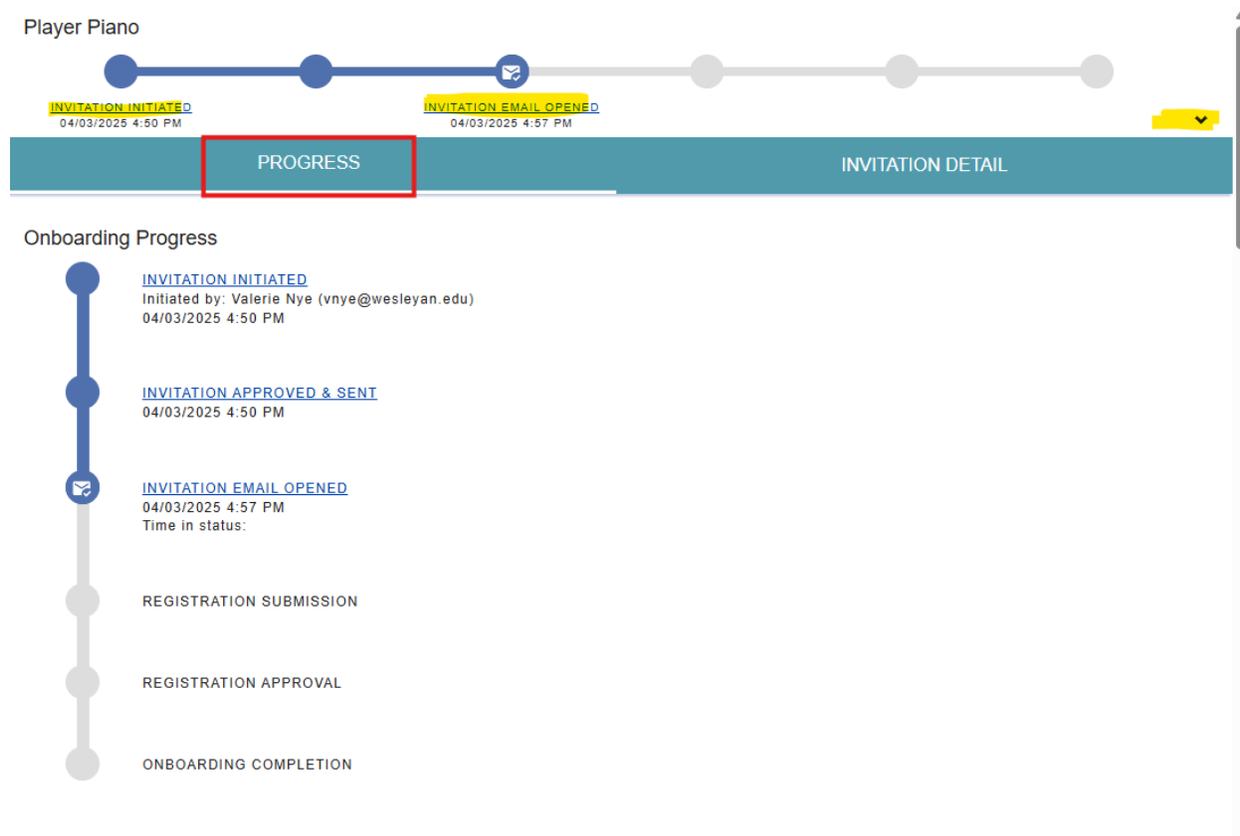
[EMAIL VERIFIED - INVITATION RECEIVED](#)  
Verified By: Gillian Owens (portroyalpw2019+gillianowens@gmail.com)  
03/01/2023 9:36 AM

**REGISTRATION SUBMITTED**  
Submitted By: Gillian Owens (portroyalpw2019+gillianowens@gmail.com)  
1 submissions  
03/01/2023 10:08 AM

[REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW](#)  
03/01/2023 10:08 AM  
Time in status: 1 hour

**ONBOARDING COMPLETION**

Payee has not responded or created an account yet:



The Progress view provides more details along the 6 stages of onboarding while the main horizontal line displays the key statuses along the way.

### **First Circle: Invitation Initiation (Wesleyan CCFS)**

- **Invitation Initiated** = Initiator sent an invitation.
- **Invitation Cancelled** = Invitation was cancelled by the initiator or another payer user.

### **Second Circle: Invitation Approval (N/A)**

Note: Wesleyan has not configured invitation approvals so this circle should immediately default to “Invitation Approved & Sent”.

### **Third Circle: Invitation Receipt (Vendor)**

- **Invitation Email Opened** = Payee opened the email invitation.

● **Invitation Link Clicked** = Payee clicked on the link in the email invitation to register with PaymentWorks.

● **Email Verified - Invitation Received** = Payee set up an account with PaymentWorks and verified their email address.

#### **Fourth Circle: Registration Submission (Wesleyan AP)**

● **Registration in Progress** = Payee began to fill out a New Vendor Registration (NVR).

● **Registration Returned - Pending Resubmission** = Payee's NVR was returned by Accounts Payable and the payee needs to make changes and resubmit the NVR.

● **Registration Submitted** = Payee completed and submitted their registration form and this registration form is no longer pending review (the registration form was reviewed and approved or rejected by Wesleyan Accounts Payable).

#### **Fifth Circle: Registration Approval (PaymentWorks Validation)**

● **Registration Submitted - Pending PaymentWorks Review** = Payee completed and submitted their registration form. PaymentWorks is reviewing the payee's banking information.

● **Registration Submitted - Pending Payee Response** = Payee completed and submitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.

● **Registration Submitted - Pending Internal Review** = Payee completed and submitted their registration form. PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from Wesleyan.

● **Registration Resubmitted - Pending PaymentWorks Review** = Payee completed and resubmitted their registration form. PaymentWorks is reviewing the payee's banking information.

● **Registration Resubmitted - Pending Payee Response** = Payee completed and resubmitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.

● **Registration Resubmitted - Pending Internal Review** = Payee completed and resubmitted their registration form. PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from Wesleyan.

● **Registration Rejected** = New vendor registration form was reviewed and rejected by Wesleyan AP.

● **Registration Approved** = New vendor registration form was reviewed and approved by Wesleyan AP.

### **Sixth Circle: Onboarding Completion**

● **Registration Processed** = Information from the new vendor registration form was exported for integration into Workday.

● **Onboarding Complete** = Payee is set up for payment. The new vendor registration is in Workday and connected (linked) to the PaymentWorks application. The payee can view their invoice data in PaymentWorks.

The Invitation Detail section will show the details entered on the invitation submission screen. If the payee has not created an account, the Initiator who sent the invitation will see an option to cancel the invitation. This will move this invitation to the “Show Canceled Only” screen, which can be accessed by checking the box in the filter menu.

**Onboardings** Sort By: Date modified Descending Need help

Player Piano

INVITATION INITIATED 04/03/2025 4:50 PM
INVITATION EMAIL OPENED 04/03/2025 4:57 PM

PROGRESS INVITATION DETAIL

**Invitation Details**

<b>Initiator:</b> Valerie Nye (vnye@wesleyan.edu)	<b>Vendor Name:</b> Player Piano	<b>Contact E-mail:</b> wesleyanpw25+playerpiano@gmail.com	<b>Initiated:</b> 04/03/2025	<b>Email Sent:</b> 04/03/2025	<b>Invitation Reminders:</b> Enabled
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**Personalized Message**  
This is how the personalized message appears in the email.

**Initiator Fields:**  
 Description of Goods and Services: Piano sales  
 Initiator Name (first and last): Valerie Nye  
 Initiator Email: vnye@wesleyan.edu  
 Initiator Department: Finance  
 Initiator Phone Number: 860-685-3195  
 Reason for inviting this supplier: Product

Cancel Invitation ✕
Disable Reminders ✕
Resend Invitation ↻

Additionally, 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.

**Other Resources:**

[PaymentWorks Initiator Manual](#)

**Training Videos:**

[Intro to PaymentWorks](#)

[Initiator Role](#)

[Sending Invitations](#)