

A stone wall sign for the University of California, Irvine. The sign is made of light-colored stone blocks and features the university's name in large, dark, serif letters. To the left of the main text is a circular seal of the University of California. The sign is set against a background of green trees and a clear blue sky. In the foreground, there is a field of tall, green grass.

University of California, Irvine

PaymentWorks Initiator Training

Accounting & Fiscal Services

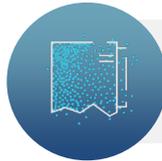
Agenda

- Introduction
- Why PaymentWorks?
- Payee Onboarding Process Map
- Accessing PaymentWorks
- Sending Invitations to Vendors
- Invitation Statuses
- Online Help and Troubleshooting
- Release and Email Notifications

Why Switch to PaymentWorks?



Help Eliminate Payment Fraud – Provides a secure electronic repository for collection of vendor documents



Ensures Compliance – PaymentWorks is a Business Identity Management platform that UCI is using to verify the payee's identity and ensure compliance



Trust our payee identity information – Vendor initiated registration and login allows secure ACH payment set up



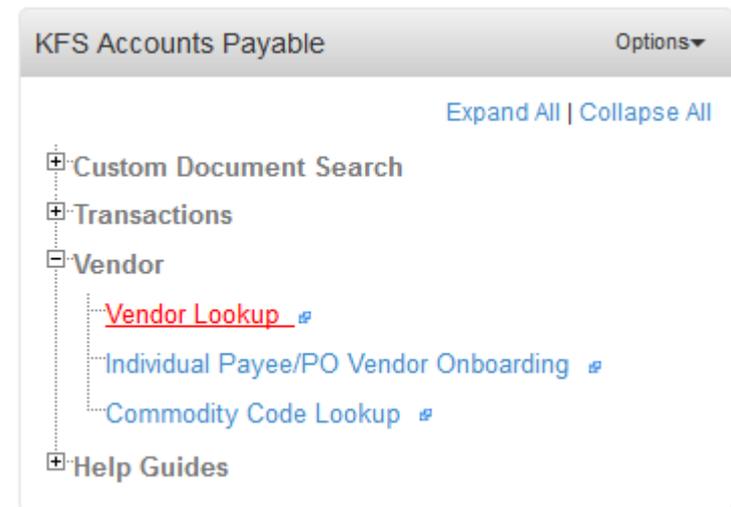
Easier updates for vendors – Self service vendor portal which will allow payees to update their information

Search For Payee in KFS

Continue to use KFS to check whether a vendor has already been onboarded. No need to onboard if they already exist. Contact Vendor-Coordinator@uci.edu if unsure or for change instructions.

Tip: Use the Vendor Lookup link in ZotPortal on the Accounts Payable and Purchasing portlets, or when inside KFS use the Jump-To menu

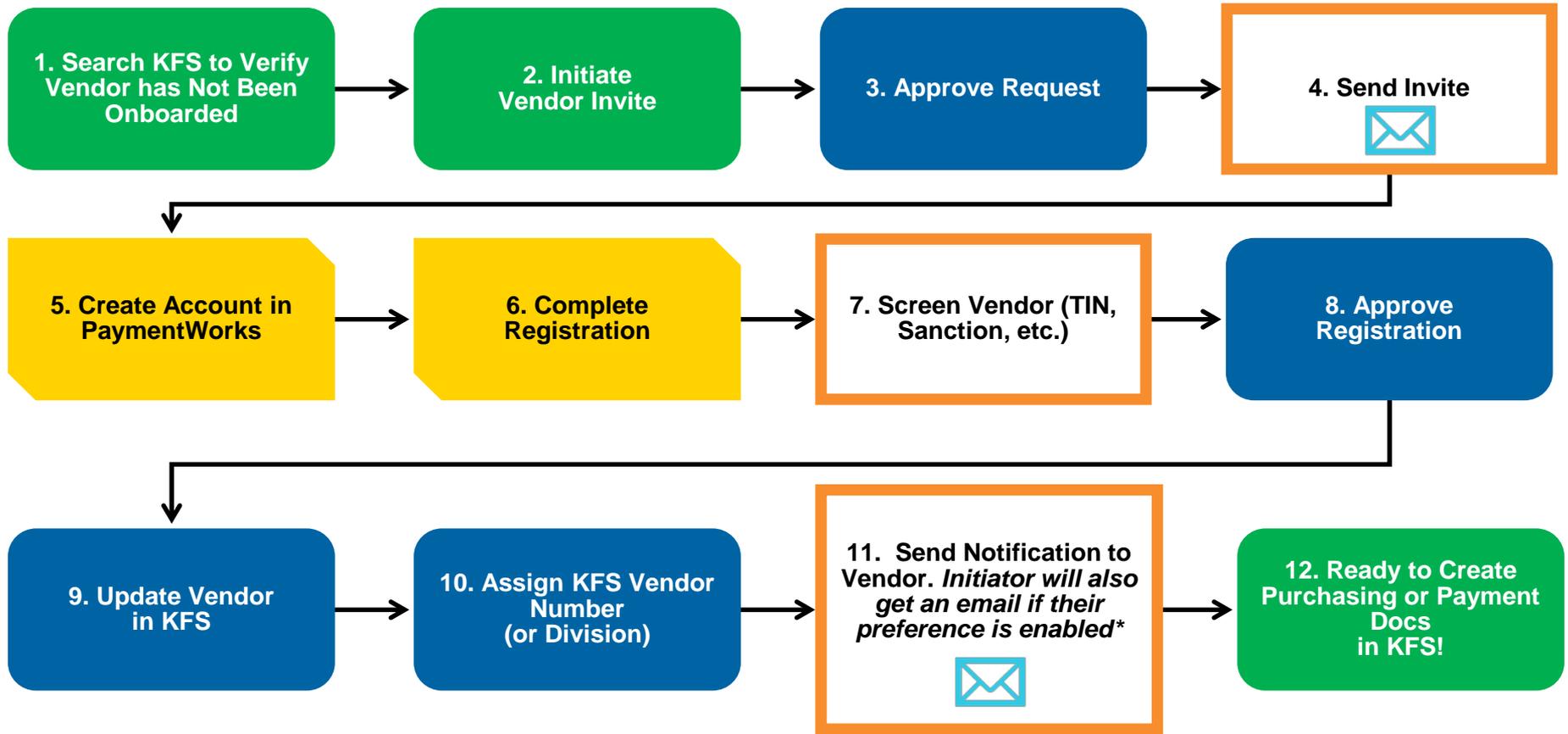
Onboard a vendor only if you need to add a new vendor to the KFS Vendor list



For PO vendors: Check Procurement's website to see if you can use an existing contracted supplier for the commodities you are purchasing

<https://procurement.uci.edu> > **Procurement** > **Contract Suppliers**

PaymentWorks Onboarding Process



Color Key

Department Initiator

UCI Vendor Coordinator

Vendor

PaymentWorks

Know Before you Onboard

Is it a DV or PO Vendor you will be paying?

- **Onboarding a vendor for reimbursement purposes? = DV Vendor**
 - Disbursement Voucher (DV) - Onboard
 - Travel & Event Management documents (TR, ENT, RELO)
 - Some individuals can be paid using the one-time payee, so don't onboard those individuals, unless paying via Foreign Wire
 - DV for Refunds (limited use)- Don't Onboard

- **KFS Purchasing = PO Vendor**
 - Requisition (REQS) or Purchase Order (PO) – Onboard
 - Try first checking with Procurement Services to see if an existing Contract Supplier can be used first & the [Preferred Buying Method](#)
 - PALCard- Don't Onboard

Logging Into PaymentWorks

Starting on Monday, Nov. 2, you will find the link in the KFS tab on ZotPortal:

- **KFS Accounts Payable**
 - Vendor
 - Individual Payee/PO Vendor Onboarding
- **KFS Purchasing**
 - Vendor
 - Individual Payee/PO Vendor Onboarding

Single Sign On (SSO)

- Login with your **UCInetID** and **password**

UCI University of California, Irvine

Login with your UCInetID

The resource you requested requires you to re-authenticate. You may also log out and log back in as another user.

Logged in as: peteranteater Logout

Password
.....

[Forgot your password?](#)

Login

[Activate my UCInetID](#) • [Need help logging in?](#)
[View recent account activity](#)

Privacy Policy • OIT

PaymentWorks Vendor Onboarding

Step 1:

- From the PaymentWorks Homepage, Click on the **Vendor Master Updates**

The screenshot displays the PaymentWorks homepage interface. At the top left is the PaymentWorks logo. On the top right, the user is identified as 'Initiator Initiator, University of California, Irvine (Test)', with links for 'Help', 'Account', and 'Logout'. The main content area is divided into four tiles, each with a 'VIDEO TUTORIAL' icon in the bottom left corner. The tiles are: 'Setup and Manage Supplier Portal' (top left), 'Messaging' (top right), 'Vendor Master Updates' (bottom left, highlighted with an orange border), and 'Dynamic Discounting' (bottom right).

PaymentWorks Vendor Onboarding

Step 2: The **New Vendors Dashboard** appears after selecting the **Vendor Master Updates** from the PaymentWorks homepage

The screenshot shows the PaymentWorks Vendor Onboarding dashboard. The 'New Vendors' tab is highlighted with an orange box. The dashboard displays a table of vendor onboarding progress. The table has the following columns: ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. The data rows are as follows:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
09/08/2020	09/14/2020	Kroger	Clicked	Email Validated	Complete Vendor #. 12378	100%
09/10/2020	09/10/2020	Daisy Duck.	Pending Approval	No Account	Not Started	0%
09/10/2020	09/10/2020	Eugene Levy	Undeliverable	No Account	Not Started	0%
09/08/2020	09/08/2020	Bank of America Corp	Clicked	Email Validated	Complete Vendor #. 12374	100%
09/08/2020	09/08/2020	Boeing	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Matthew Fox	Clicked	Email Validated	Complete Vendor #. 12372	100%
09/08/2020	09/08/2020	Michael Emerson	Clicked	Email Validated	Complete Vendor #. 12376	100%
09/08/2020	09/08/2020	Harold Perrineau	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Daniel Dae Kim	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Chevron	Clicked	Email	Submitted	75%

The filter sidebar on the left includes fields for Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. There are also buttons for 'Clear Filters' and 'Send Invitation...'. A 'VIDEO TUTORIAL' button is also present.

Sending Invitation

Step 3:

What to have in advance:

- Vendor Name
- Vendor's E-mail
- Payment reason

Click on Send Invitation button.

This will open up the Invite New Vendor form

PaymentWorks Vendor Master

Home New Vendors

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

ONBOARD START	UPDATED
09/08/2020	09/17/2020
09/08/2020	09/14/2020
09/10/2020	09/10/2020
09/10/2020	10/05/2020
09/10/2020	09/10/2020
09/15/2020	09/28/2020
09/16/2020	10/04/2020
09/16/2020	09/24/2020

Invite New Vendor

Step 4:

On the Invite New Vendor form, fill out the required fields and **click “Send”**

Description of Goods and Services:

Indicate the Type of Supplier the Vendor Coordinator should record them as, by indicating how you will be paying the vendor (via Disbursement Voucher or Purchase Order).

Type “**DV**” or “**PO**” & “-” then add payment reason:

- **DV** – Honoraria, Research Participant, Award, Membership/Subscription dues, etc.
- **PO** – Supplier, Vendor Contract, Performance/Service agreement, Individual Contractor/Consultant agreement, etc.

Reason for inviting this supplier:

Dropdown limited to Product, Service, or both. If your payment does not meet either, by default please select both Product and Service.

The screenshot shows the 'Invite New Vendor' form with the following fields filled out:

- Company/Individual Name: VENDOR TEST
- Contact E-Mail: EMMA@VENDORTEST.COM
- Verify Contact E-Mail: EMMA@VENDORTEST.COM
- Description of Goods and Services: PO - LAB SUPPLIES
- Initiator Department: DFA
- Initiator Phone Number: 949-824-0000
- Reason for inviting this supplier: Product and Service
- Personalized Message: Kindly complete the onboarding registration required for UCI payment processing. Please contact me directly at foster@uci.edu or call (949) 888-8888 if you have questions about the UCI payment.

At the bottom right, there are two buttons: 'Cancel' and 'Send'. The 'Send' button is highlighted with an orange border. A large red watermark 'Sample Invite' is overlaid on the form.

Invite New Vendor

Personalized Message:

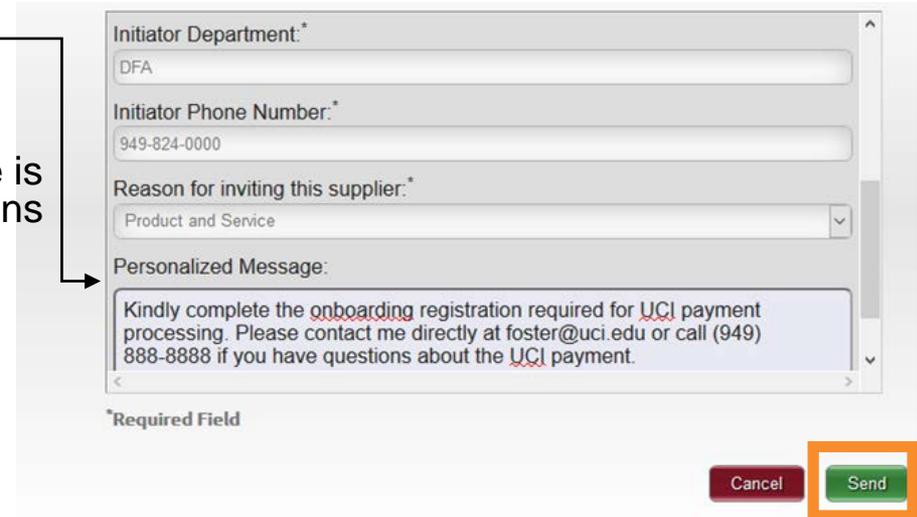
This field allows custom text to appear on the Vendor Invitation email that is sent to the vendor. This should be used to advise the vendor if there is a department contact they can refer their questions to

Either leave this field blank for sending

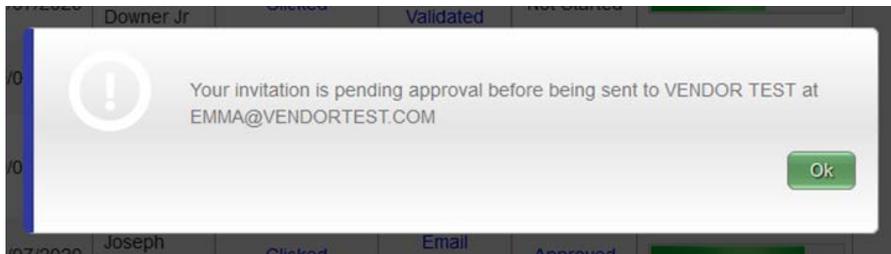
-or-

Use the following generic text:

Kindly complete the registration for UCI Payment Processing. For further reference, you can also contact the department sending you the invitation [Initiator Name] directly at -----@uci.edu



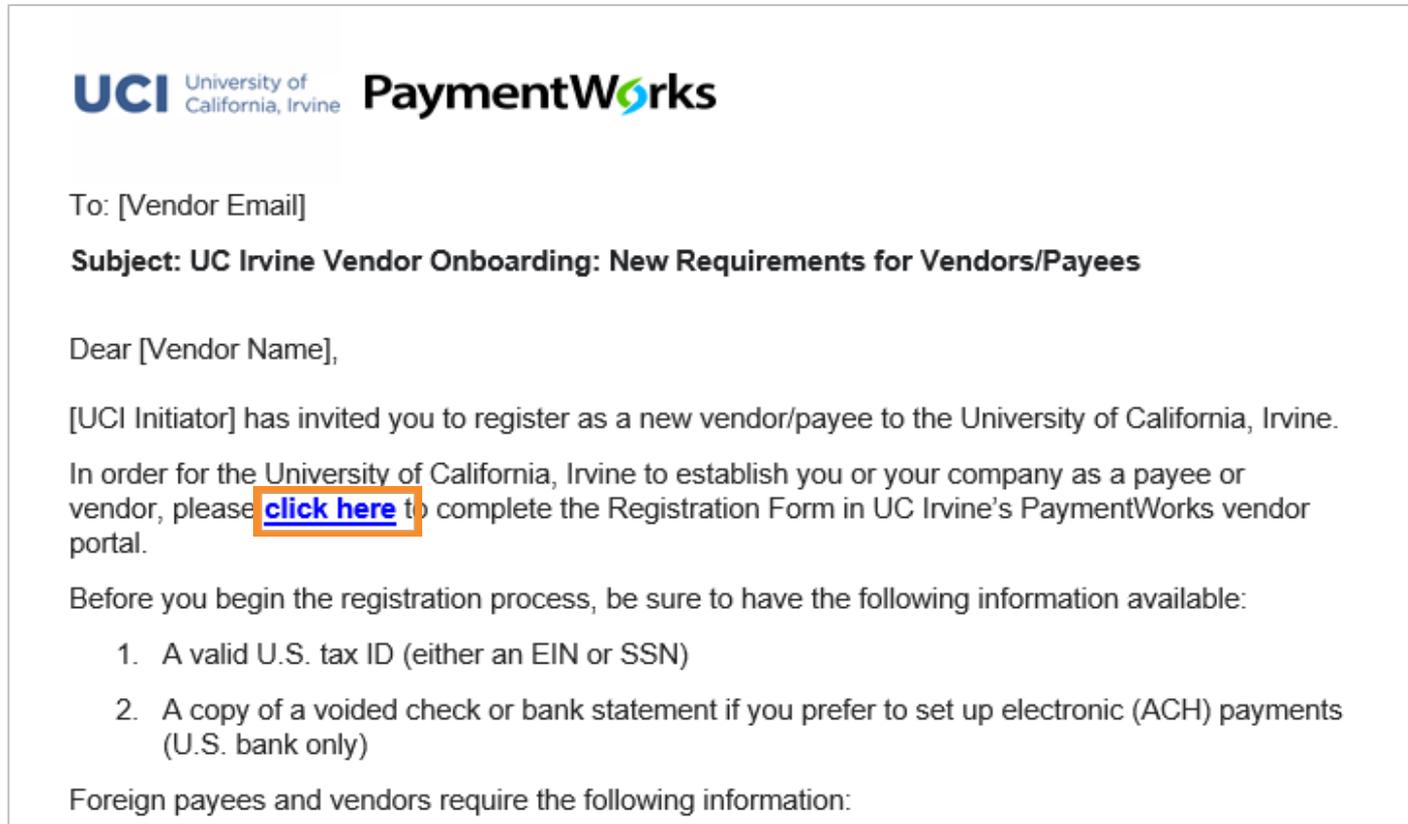
The screenshot shows a form with several fields: Initiator Department (DFA), Initiator Phone Number (949-824-0000), Reason for inviting this supplier (Product and Service), and Personalized Message. The Personalized Message field contains the text: "Kindly complete the onboarding registration required for UCI payment processing. Please contact me directly at foster@uci.edu or call (949) 888-8888 if you have questions about the UCI payment." Below the form are "Cancel" and "Send" buttons, with the "Send" button highlighted by an orange box.



After clicking "Send" on the invitation, you will receive a confirmation that the invitation is pending approval (by the UCI Vendor Coordinator).

Vendor Onboarding Invitation Email

The UCI Vendor Onboarding invitation email is sent from PaymentWorks to the vendor. Once the vendor clicks the email link, the payee will be required to create a PaymentWorks account (no fee) in order to begin the UCI registration process. The Initiator's name will appear in the invite.



The screenshot shows an email header with the UCI University of California, Irvine logo and the PaymentWorks logo. The recipient is [Vendor Email] and the subject is 'UC Irvine Vendor Onboarding: New Requirements for Vendors/Payees'. The body of the email addresses [Vendor Name] and states that [UCI Initiator] has invited them to register as a new vendor/payee. It instructs the vendor to click a link (highlighted with an orange box) to complete the registration form in the UC Irvine's PaymentWorks vendor portal. A list of requirements is provided, including a valid U.S. tax ID and a voided check or bank statement for electronic payments. A note at the bottom states that foreign payees and vendors require additional information.

UCI University of California, Irvine **PaymentWorks**

To: [Vendor Email]

Subject: UC Irvine Vendor Onboarding: New Requirements for Vendors/Payees

Dear [Vendor Name],

[UCI Initiator] has invited you to register as a new vendor/payee to the University of California, Irvine.

In order for the University of California, Irvine to establish you or your company as a payee or vendor, please [click here](#) to complete the Registration Form in UC Irvine's PaymentWorks vendor portal.

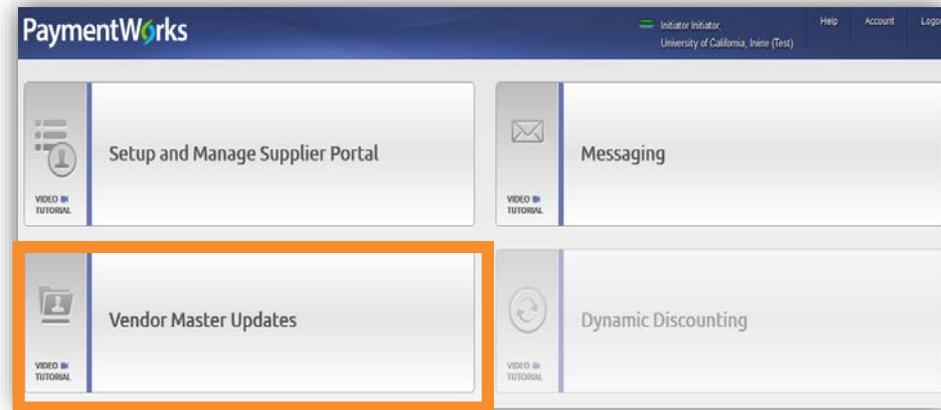
Before you begin the registration process, be sure to have the following information available:

1. A valid U.S. tax ID (either an EIN or SSN)
2. A copy of a voided check or bank statement if you prefer to set up electronic (ACH) payments (U.S. bank only)

Foreign payees and vendors require the following information:

How to Check your Invitation Status

- Login to PaymentWorks
- Click on **Vendor Master Updates**
- Select the **New Vendors Onboarding** dashboard
- Dashboard view defaults to the latest date order in the UPDATED column



The screenshot shows the 'Vendor Master Updates' dashboard with a table of vendor onboarding progress. The table has columns for 'ONBOARD START', 'UPDATED', 'VENDOR NAME', 'INVITATION', 'VENDOR ACCOUNT', 'NEW VENDOR REGISTRATION', and '% COMPLETE'. The 'UPDATED' column is sorted in descending order of date. An orange arrow points to the 'UPDATED' column header.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	EMMA DVPAYEE	Pending Approval	No Account	Not Started	<div style="width: 0%;"></div>
10/10/2020	10/10/2020	VENDOR TEST	Pending Approval	No Account	Not Started	<div style="width: 0%;"></div>
09/27/2020	10/08/2020	Johnny Rose	Delivered	No Account	Not Started	<div style="width: 0%;"></div>
09/16/2020	10/07/2020	Robert Downer Jr	Clicked	Email Validated	Not Started	<div style="width: 25%;"></div>
10/04/2020	10/07/2020	bo's consulting	Clicked	Email Validated	Not Started	<div style="width: 25%;"></div>
10/04/2020	10/07/2020	billy the bobcat	Clicked	Email Validated	Complete Vendor #: 1002	<div style="width: 100%;"></div>
10/07/2020	10/07/2020	Joseph Warner	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>
10/07/2020	10/07/2020	onboard my friend	Clicked	Email Validated	Complete Vendor #: 9888	<div style="width: 100%;"></div>
10/07/2020	10/07/2020	kctest123	Clicked	Email Validated	Submitted	<div style="width: 75%;"></div>
09/10/2020	10/05/2020	Eugene Levy	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>
09/16/2020	10/04/2020	Pitney Bowes	Clicked	Email Validated	Complete Vendor #: 93248	<div style="width: 100%;"></div>
09/16/2020	10/04/2020	Ryerson Holding	Clicked	Email Validated	Complete Vendor #: 93247	<div style="width: 100%;"></div>

How to Check your Invitation Status

(larger Image Example)

The screenshot displays the PaymentWorks interface for Vendor Master Updates. The page includes a navigation bar with 'Home' and 'New Vendors' buttons, and a user profile for 'Initiator Initiator, University of California, Irvine (Test)'. A 'SHOW: Onboardings' dropdown is visible. The main content is a table with columns for 'ONBOARD START', 'UPDATED', 'VENDOR NAME', 'INVITATION', 'VENDOR ACCOUNT', 'NEW VENDOR REGISTRATION', and '% COMPLETE'. A filter sidebar on the left allows for searching by Vendor Name, Vendor #, Contact E-Mail, and various approval and registration steps. A 'Send Invitation...' button is located at the bottom of the filter sidebar.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
09/08/2020	09/14/2020	Kroger	Clicked	Email Validated	Complete Vendor #: 12378	100%
09/10/2020	09/10/2020	Daisy Duck.	Pending Approval	No Account	Not Started	0%
09/10/2020	09/10/2020	Eugene Levy	Undeliverable	No Account	Not Started	0%
09/08/2020	09/08/2020	Bank of America Corp	Clicked	Email Validated	Complete Vendor #: 12374	100%
09/08/2020	09/08/2020	Boeing	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Matthew Fox	Clicked	Email Validated	Complete Vendor #: 12372	100%
09/08/2020	09/08/2020	Michael Emerson	Clicked	Email Validated	Complete Vendor #: 12376	100%
09/08/2020	09/08/2020	Harold Perrineau	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Daniel Dae Kim	Clicked	Email Validated	Submitted	75%
09/08/2020	09/08/2020	Chevron	Clicked	Email	Submitted	75%

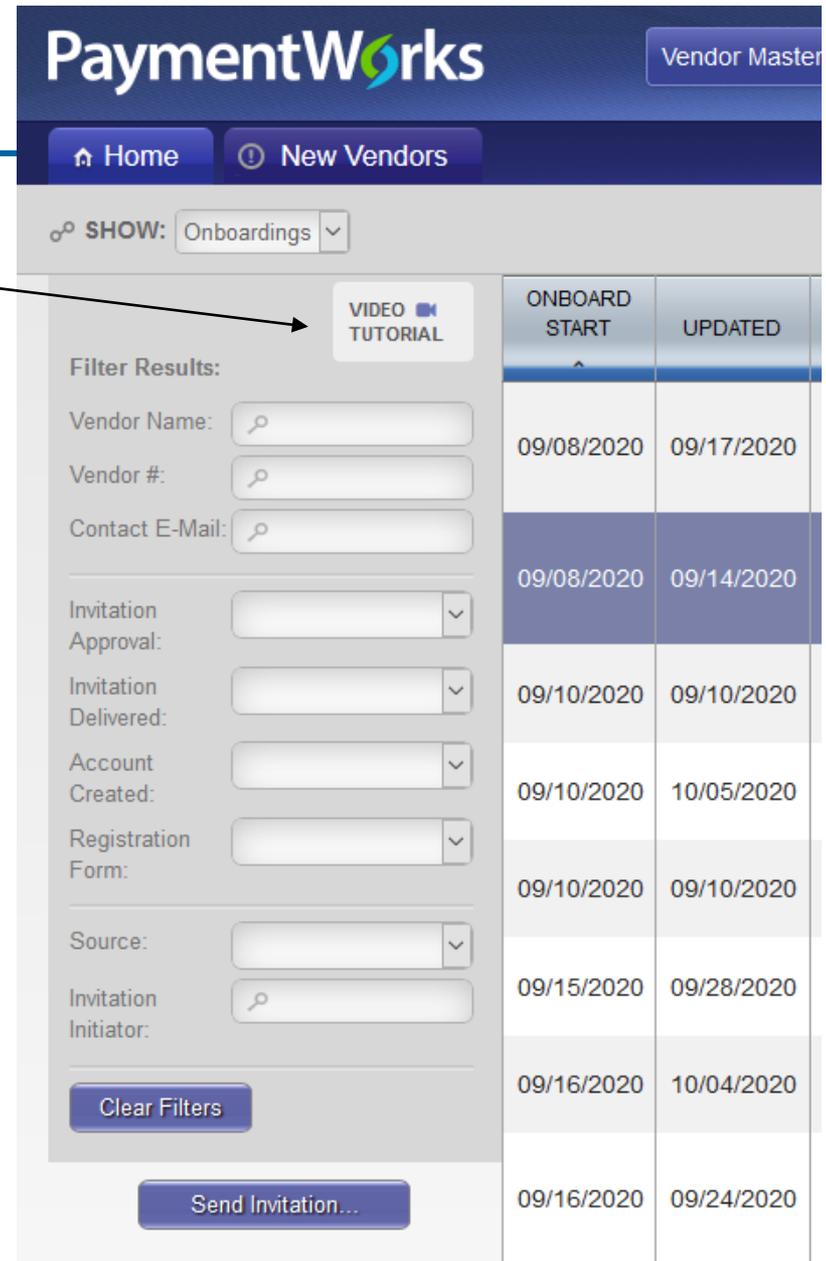
Invitation Status

For quick help, please watch the [Initiator Video \(Link\)](#)

When Checking the Invitation Status, use the filters to narrow your results and search as you type

Commonly Used Dashboard Search Fields:

- Invitation Initiator UCINetID
 - See only what one person sent out!
- Vendor Contact E-Mail
- Vendor Name



The screenshot shows the PaymentWorks Vendor Master dashboard. At the top, there are navigation buttons for 'Home' and 'New Vendors'. Below that, a 'SHOW:' dropdown menu is set to 'Onboardings'. A 'VIDEO TUTORIAL' button is visible, with an arrow pointing to it from the text in the slide. The main area contains a 'Filter Results:' section with several search fields: 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', 'Source', and 'Invitation Initiator'. Below the filters are 'Clear Filters' and 'Send Invitation...' buttons. On the right, a table displays invitation status data.

ONBOARD START	UPDATED
09/08/2020	09/17/2020
09/08/2020	09/14/2020
09/10/2020	09/10/2020
09/10/2020	10/05/2020
09/10/2020	09/10/2020
09/15/2020	09/28/2020
09/16/2020	10/04/2020
09/16/2020	09/24/2020

Invitation Tracking

Review the Onboarding Invitation status on the New Vendor dashboard to track the vendor registration and onboarding completion.

- Once the Initiator submits the Invite request, the INVITATION status is “Pending Approval”

ONBOARD START	UPDATED▼	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Pending Approval	No Account	Not Started	<div style="width: 10%; height: 10px; background-color: green;"></div>

- Click on “Pending Approval” to review the Invitation Details. Close to collapse.

Invitation Details: close

Initiator: Initiator Initiator (ucirvinepw+initiator@gmail.com) Vendor Name: VENDOR TEST Contact E-mail: ucirvinepw+vendortest@gmail.com Initiated: 10/10/2020 Email Sent:

Custom Fields:

Initiator Phone Number : 949-824-0000

Initiator Department : DFA

Reason for inviting this supplier : Product and Service

Description of Goods and Services : PO - SUPPLIER

Pending Approval By:
Vendor Approver

Review Invitation Status

When the Vendor Coordinator approves the invite request, the INVITATION status changes

ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Delivered	No Account	Not Started	<div style="width: 10%; background-color: green;"></div>



ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Opened	No Account	Not Started	<div style="width: 20%; background-color: green;"></div>



ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Clicked	No Account	Not Started	<div style="width: 30%; background-color: green;"></div>

When the vendor registers in PaymentWorks, the VENDOR ACCOUNT status changes

ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Clicked	Registered	Not Started	<div style="width: 40%; background-color: green;"></div>



ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/10/2020	10/10/2020	VENDOR TEST	Clicked	Email Validated	Not Started	<div style="width: 50%; background-color: green;"></div>

Review Invitation Status

- The NEW VENDOR REGISTRATION status changes based on the vendor's registration activity.



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/07/2020	10/07/2020	kctest123	Clicked	Email Validated	Submitted	<div style="width: 25%;"></div>
09/10/2020	10/05/2020	Eugene Levy	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>
09/16/2020	10/04/2020	Pitney Bowes	Clicked	Email Validated	Complete Vendor #: 93248	<div style="width: 100%;"></div>
09/16/2020	10/04/2020	Ryerson Holding	Clicked	Email Validated	Complete Vendor #: 93247	<div style="width: 100%;"></div>
10/03/2020	10/04/2020	Iron Mountain	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>

Home | Vendor Profiles | Updates | New Vendors | Reimbursements

SHOW: Onboardings

Filter Results:	VIDEO TUTORIAL	ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Vendor Name: <input type="text"/>		11/26/2019	11/26/2019	Registration Routing	Clicked	Email Validated	Complete Vendor #: 12349	<div style="width: 100%;"></div>

- When the New Vendor Registration status is Complete with the KFS Vendor number (parent -0). This indicates that the vendor/payee is now in KFS.
- Go to KFS to view full vendor information or initiate eDocs

Review Onboarding Status

Home | New Vendors

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/22/2018	04/22/2018	Ashley Watson Laundry	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>

Invitation column:

- Pending Approval
- Opened
- Clicked
- Rejected
- Undeliverable
- Cancelled

Vendor Account Column:

- No Account
- Registered
- Email Validated

New Vendor Registration column:

- Not Started
- In Progress
- Submitted
- Returned
- Approved
- Rejected
- Complete
- Processed

Onboarding Status

Invitation Statuses

<u>Status</u>	<u>Explanation</u>
Pending Approval	Invitation is in the Vendor Coordinator queue for review.
Sent	Acknowledges that the invitation was sent. If status remains over 2 days, the email address needs to be validated.
Delivered	Invitation was delivered to the vendor's email.
Opened	Vendor opened the invitation email.
Clicked	Vendor read the invitation email and clicked the link to create a PaymentWorks account.
Rejected	Vendor Coordinator rejected the invitation request.
Undeliverable	Invitation delivery was unsuccessful. This usually indicates the contact email address was invalid.
Cancelled	The invitation has been cancelled.

Onboarding Status

Vendor Account Statuses

<u>Status</u>	<u>Explanation</u>
No Account	Vendor has not used their invitation nor click the link to create a PaymentWorks account.
Registered	Vendor account was created but not activated.
Email Validated	Vendor has created and activated their account.

Onboarding Status

New Vendor Registration Statuses

<u>Status</u>	<u>Explanation</u>
Not Started	Vendor has not entered information on their registration.
In Progress	Vendor started entering information on the registration but has not submitted.
Submitted	Vendor submitted their registration.
Returned	The registration has been returned to the vendor in order for a correction to be made. The vendor will be emailed directly with the requested correction. They will also receive a message in their “Messages” tab on the dashboard.
Approved	The registration has been approved by the Vendor Coordinator.
Rejected	Vendor rejected the registration.
Processed	The registration has been entered by the vendor and sent to your campus vendor coordinator for entry into KFS.
Complete	The vendor record has been created in KFS, and the vendor number has been issued. The KFS vendor number will appear under “New Vendor Registration”.

Onboarding Guidelines

- Do Not send invitations to yourself.
- Payments to UC employees are considered taxable income and typically must be processed through the payroll system.
- Students do not need to be onboarded as vendors, to be paid with a Disbursement Voucher (DV).
- In some rare circumstances, UC employees or students may be onboarded as a vendor but special approval may be required by the relevant campus authority. (See the UCI Vendor Onboarding website for clarity)

Troubleshooting

The vendor/payee has not completed the forms

- The vendor will receive emails until the registration is completed or the reminders are cancelled.
- Reminder email notifications are **automatically** generated until the vendor clicks the PaymentWorks registration link.
- Do not re-send invitations unless the payee notifies you that they did not receive the initial email:
- Vendor Invitation Email automatic reminder schedule:
 - 1st reminder – 3 days
 - 2nd reminder – 7 days
 - 3rd reminder – 14 days
 - 4th reminder – 21 days
 - 5th reminder – 28 days

Troubleshooting

How will I know when the vendor onboarding is complete in KFS?

- You can check the status on the New Vendor Onboardings dashboard if the status indicates “Complete”.
- The initiator will receive an email from PaymentWorks when the onboarding process is completed and a KFS vendor number is assigned.



The screenshot shows a dashboard with a navigation bar containing 'Home' and 'Vendor Profiles'. Below the navigation bar, there is a 'SHOW: Onboardings' dropdown menu. A 'VIDEO TUTORIAL' button is visible. The main content area features a table with the following columns: ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. The first row of data shows: ONBOARD START: 11/26/2019, UPDATED: 11/26/2019, VENDOR NAME: Registration Routing, INVITATION: Clicked, VENDOR ACCOUNT: Email Validated, NEW VENDOR REGISTRATION: Complete (highlighted with an orange box) and Vendor #: 12349, and % COMPLETE: a blue progress bar.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
11/26/2019	11/26/2019	Registration Routing	Clicked	Email Validated	Complete Vendor #: 12349	

Troubleshooting

Error when sending Payee invitation. “An invitation was previously sent to this email address”

- PaymentWorks does not allow multiple invitations to be sent to a single email. Someone else may have previously sent the invite.

Invite New Vendor

Company/Individual Name:*
Robert

Contact E-Mail:*

An invitation was previously sent to this email address

Verify Contact E-Mail:*

ryan.skousen@aexp.com

Is this invitation to an individual or entity?:
- Choose One -

Description of Products/Services:

*Required Field

Cancel Send

Troubleshooting

My payee did not receive the invite ...

- Verify that the payee has checked their spam folder

Initiators have the ability to re-send an invitation. To resend invitation:

- Click the status in the Invitation column.
- At the bottom of the Invitation Details screen popout click “Resend Invitation” button.
- Resend requests will also route for Vendor Coordinator approval.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
12/05/2018	12/05/2018	Test Vendor 1	Pending Approval	No Account	Not Started	
11/05/2018	11/06/2018	Michael Gluffre Student US	Clicked	Email Validated	In Progress	
11/05/2018	11/06/2018	Michael Gluffre Student Foreign	Clicked	Email Validated	Not Started	
11/07/2018	11/06/2018	Konica Minolta	Clicked	Email Validated	In Progress	
11/08/2018	11/06/2018	Insight Direct USA	Sent	No Account	Not Started	
11/02/2018	11/06/2018	FL Technical	Clicked	Email Validated	Complete Vendor #: 0000150525	
10/31/2018	11/06/2018	Digitas	Cancelled	No Account	Not Started	
11/05/2018	11/06/2018	Henry Schein	Sent	No Account	Not Started	
10/25/2018	11/05/2018	Ahead LLC	Clicked	Email Validated	Processed	
11/01/2018	11/06/2018	Spalding	Clicked	Email Validated	Not Started	
11/01/2018	11/05/2018	Michael Gluffre	Clicked	Email Validated	Not Started	
11/01/2018	11/01/2018	Spalding	Cancelled	No Account	Not Started	
					Complete	

Invitation Details:

Initiator: Dick Doolin (tufts13@pwwexternal.com) Vendor Name: John Smith Contact E-mail: tufts15@pwwexternal.com Initiated: 12/07/2018 Email Sent: 12/07/2018

Personalized Message: Thank you for speaking with our chemistry class.

Custom Fields: Vendor Type : Honorarium

Cancel Reminders **Resend Invitation**

Troubleshooting

Entered the wrong email address

You can correct and re-send invitations with the following invitation statuses: Sent, Delivered, Not Deliverable.

To re-send invitation with the correct email address:

- Click on the invitation status.
- Select “Resend Invitation” button
- Enter correct email address under “Contact E-Mail”
- Click on the “Send” button when finished.

VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
com)	Vendor Name: John Smith	Contact E-mail: tufts15@pwexternal.com	Initiated: 12/07/2018	Email Sent: 12/07/2018
chemistry class.				

Cancel Reminders  **Resend Invitation** 

 Resend New Vendor Invitation

Company/Individual Name:*
Texas Ski Ranch

Contact E-Mail:*
andrew@texasskiranch.com

Verify Contact E-Mail:.*
andrew@texasskiranch.com

IS this invitation to an individual or entity?:
- Choose One -

Description of Products/Services:

*Required Field

Cancel **Send**

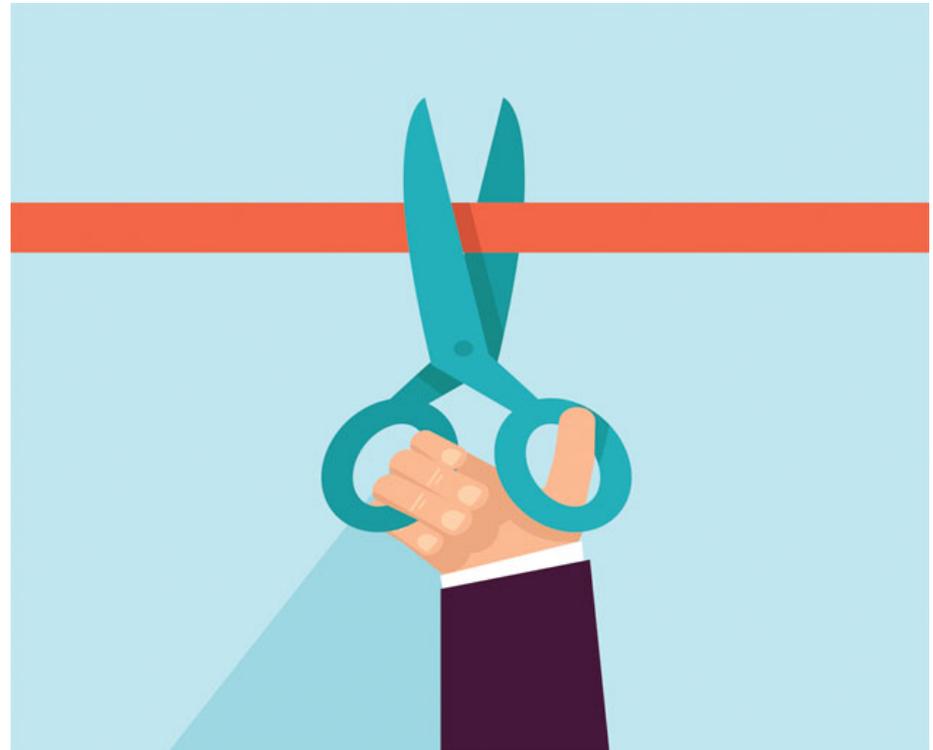
Troubleshooting

Who can I contact for inquiries, issues or support?

- For questions regarding the UCI vendor onboarding and registration process, contact the UCI Vendor Coordinator at vendor-coordinator@uci.edu.
- For questions regarding the PaymentWorks platform, or if you or the vendor are experiencing problems with using the PaymentWorks portal, contact support@paymentworks.com.

PaymentWorks Official Go Live

- PaymentWorks will go into production for the entire campus on **Monday, Nov. 2, 2020.**
- KVO will not be decommissioned until all pending vendor onboarding requests are completed, but you will not be able to use it to onboard new vendors.



PaymentWorks Email Notifications

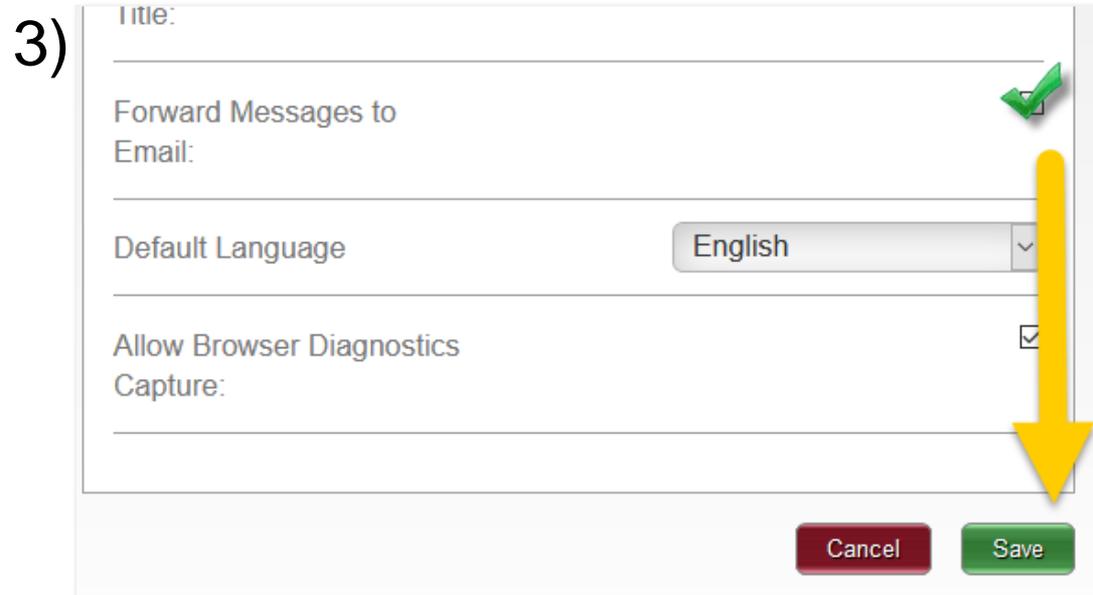
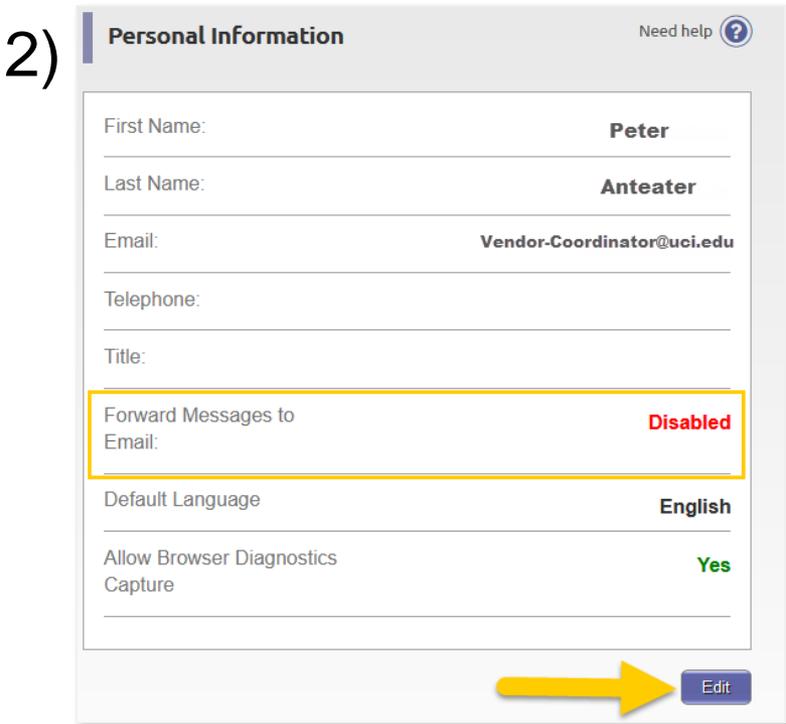
In order to receive an email when your vendor has been onboarded (final stage), you'll need to edit your PaymentWorks Account (Personal Information).

- By default, this email setting is off.

- 1) Go to your Account in PaymentWorks.
- 2) Select to Edit your Personal Information.
- 3) Check the box for "Forward Messages to Email". Save changes!



PaymentWorks Email Notifications (steps)



Have Questions?

*For more information, contact us at
vendor-coordinator@uci.edu*

*Or check the FAQ on our website at:
<https://accounting.uci.edu/vendor-onboarding/>*