THE UNIVERSITY OF UTAH®

PaymentWorks

Vendor Registration Tool

March 2023

PaymentWorks

BUILDING TRUST IN SUPPLIER RELATIONSHIPS

THE UNIVERSITY OF UTAH®

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

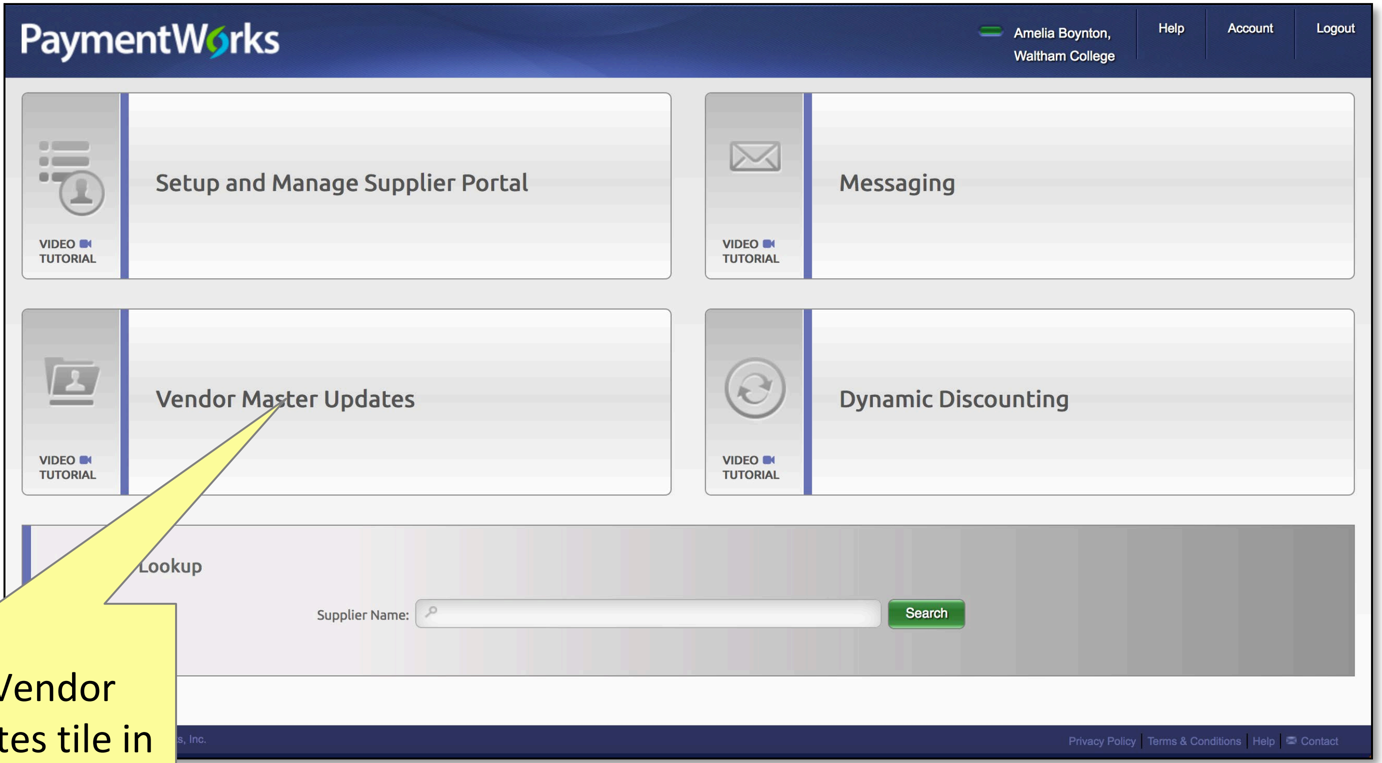
- PO vs ePR Vendors
  - We will be able to use PaymentWorks for ePR and PO vendors
- Domestic vs Foreign Vendors
  - We are currently able to use the tool to register domestic vendors only
- Other Vendor Types
  - Eventually, we will be able to use the tool with foreign vendors and Refund & Reimbursement 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:

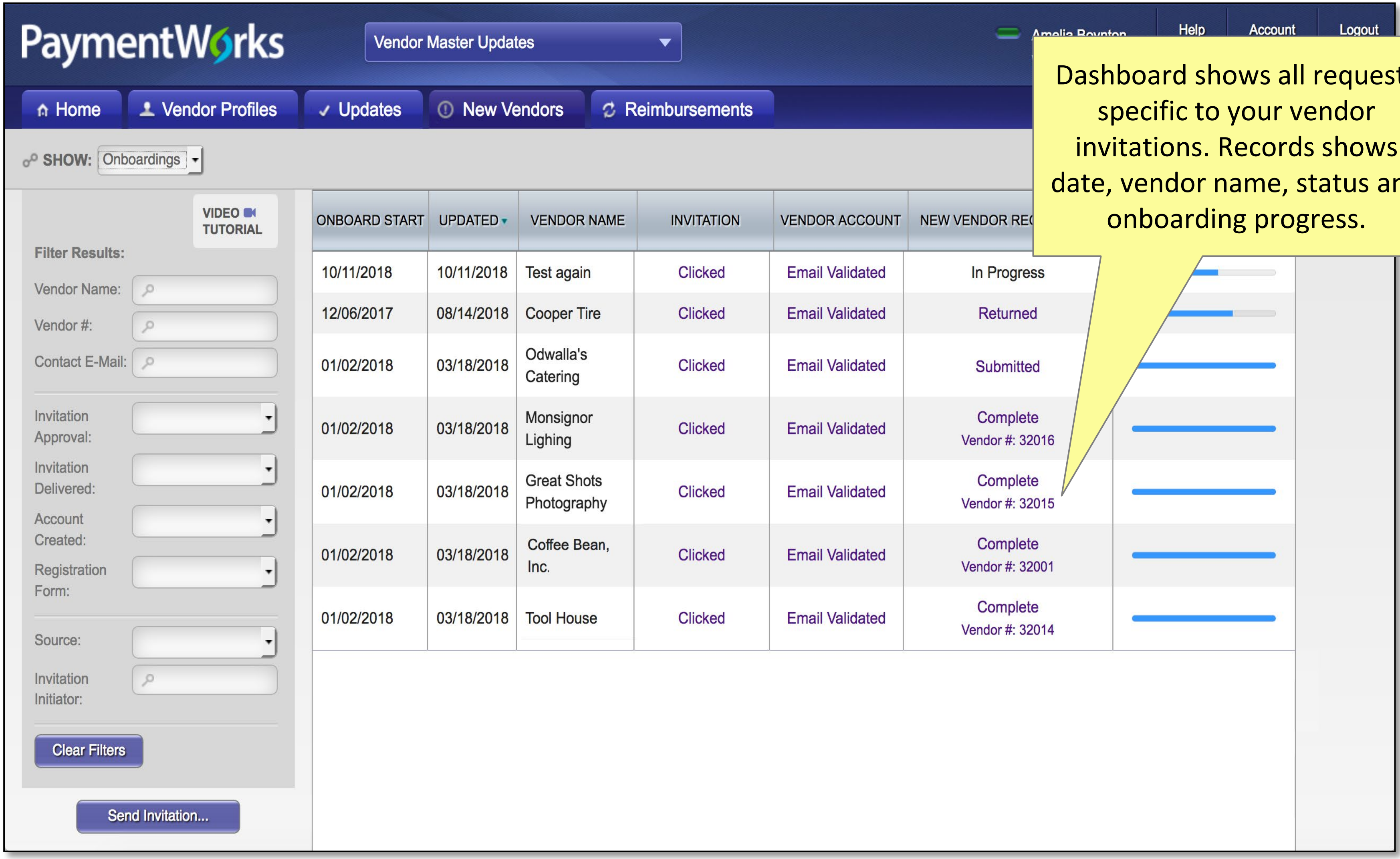
https://www.paymentworks.com/app

Home Page


PaymentWorks
Amelia Boynton,
Waltham College
Help
Account
Logout
VIDEO TUTORIAL
Setup and Manage Supplier Portal
VIDEO TUTORIAL
Messaging
VIDEO TUTORIAL
Vendor Master Updates
VIDEO TUTORIAL
Dynamic Discounting
Lookup
Supplier Name:
Search
s, Inc.
Privacy Policy
Terms & Conditions
Help
Contact

Select the Vendor Master Updates tile in the bottom left

Dashboard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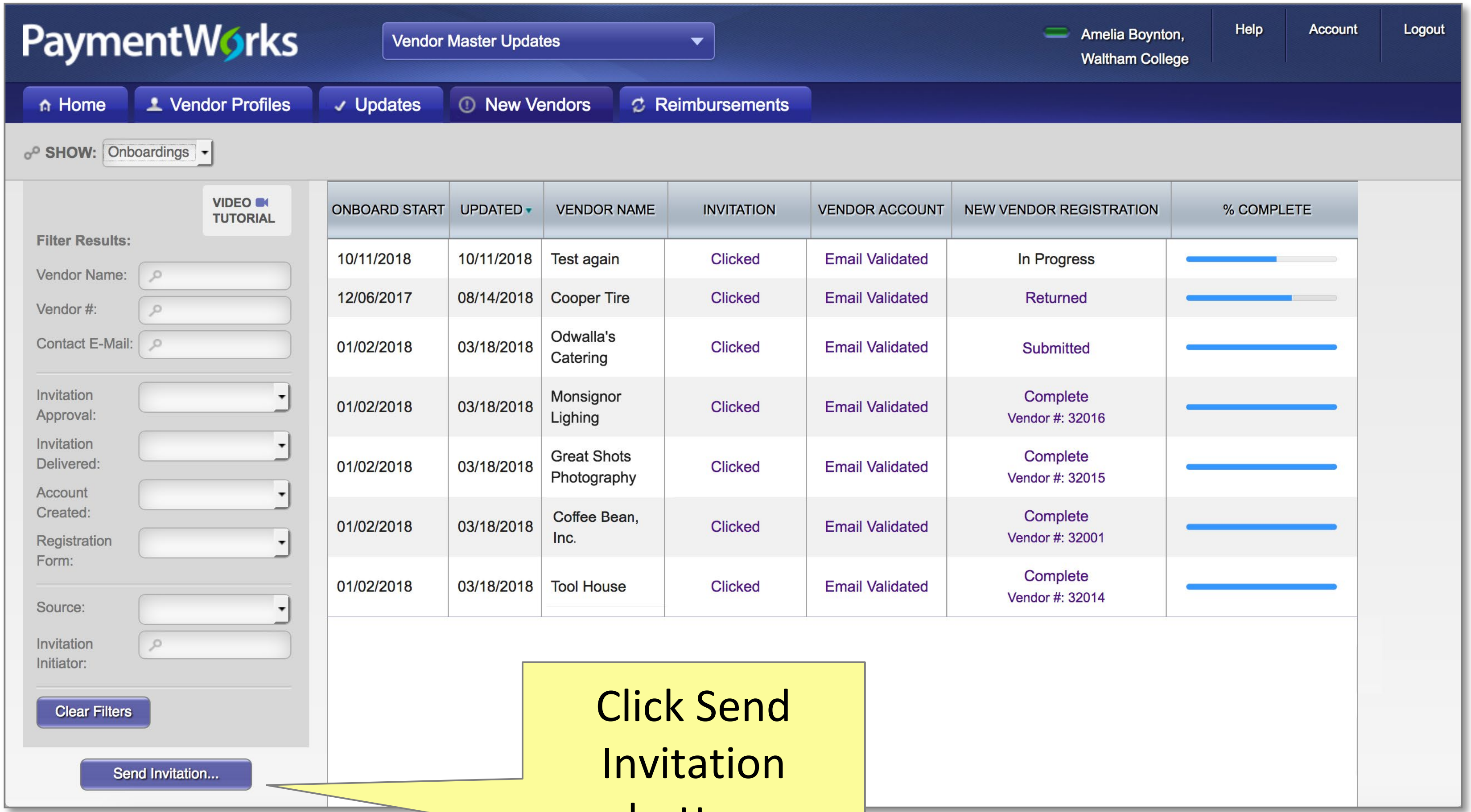
New Vendors
Reimbursements
SHOW: Onboardings
VIDEO TUTORIAL
Filter Results:
Vendor Name:
Vendor #:
Contact E-Mail:
Invitation Approval:
Invitation Delivered:
Account Created:
Registration Form:
Source:
Invitation Initiator:
Clear Filters
Send Invitation...

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REC
10/11/2018	10/11/2018	Test again	Clicked	Email Validated	In Progress
12/06/2017	08/14/2018	Cooper Tire	Clicked	Email Validated	Returned
01/02/2018	03/18/2018	Odwalla's Catering	Clicked	Email Validated	Submitted
01/02/2018	03/18/2018	Monsignor Lighing	Clicked	Email Validated	Complete Vendor #: 32016
01/02/2018	03/18/2018	Great Shots Photography	Clicked	Email Validated	Complete Vendor #: 32015
01/02/2018	03/18/2018	Coffee Bean, Inc.	Clicked	Email Validated	Complete Vendor #: 32001
01/02/2018	03/18/2018	Tool House	Clicked	Email Validated	Complete Vendor #: 32014

Dashboard shows all requests specific to your vendor invitations. Records shows date, vendor name, status and onboarding progress.

Vendor Invitation


PaymentWorks
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Amelia Boynton, Waltham College
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Updates
New Vendors
Reimbursements
VIDEO TUTORIAL
Clear Filters
Send Invitation...

SHOW: Onboardings

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

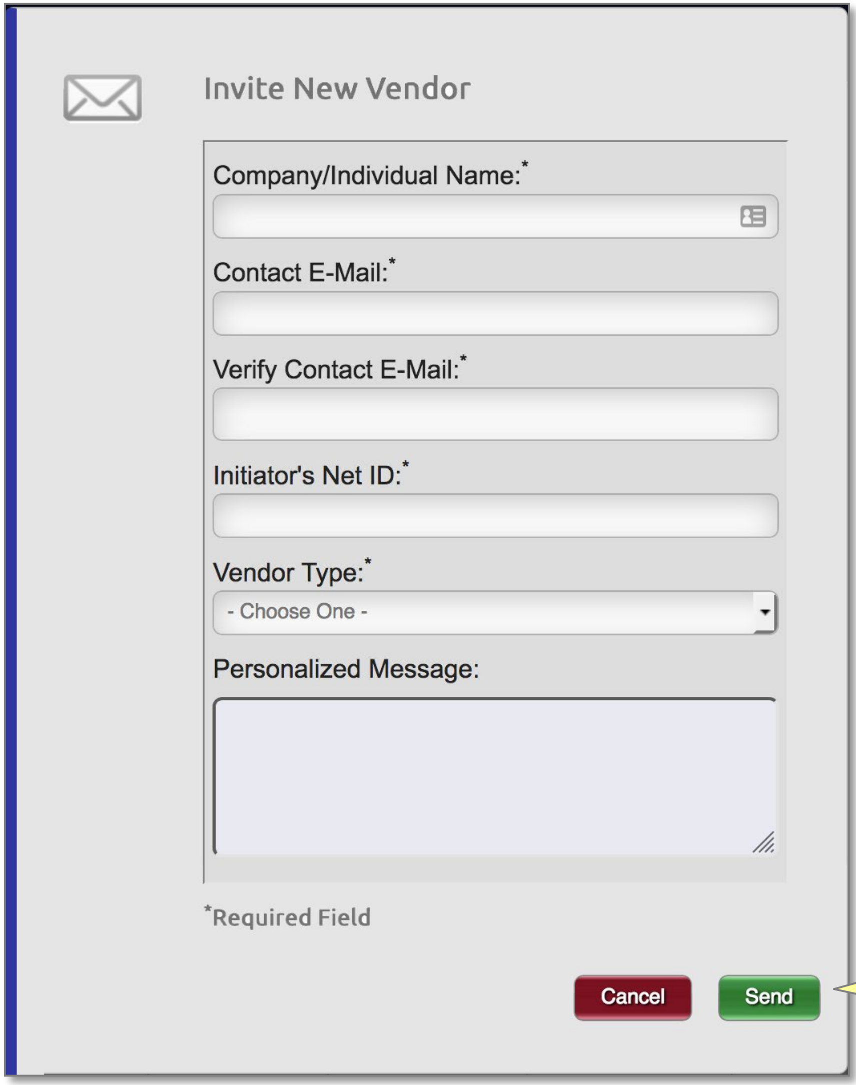
Source:

Invitation Initiator:

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

Click Send Invitation button

Invite New Vendor



Invite New Vendor

Company/Individual Name:*

Contact E-Mail:*

Verify Contact E-Mail:*

Initiator's Net ID:*

Vendor Type:*

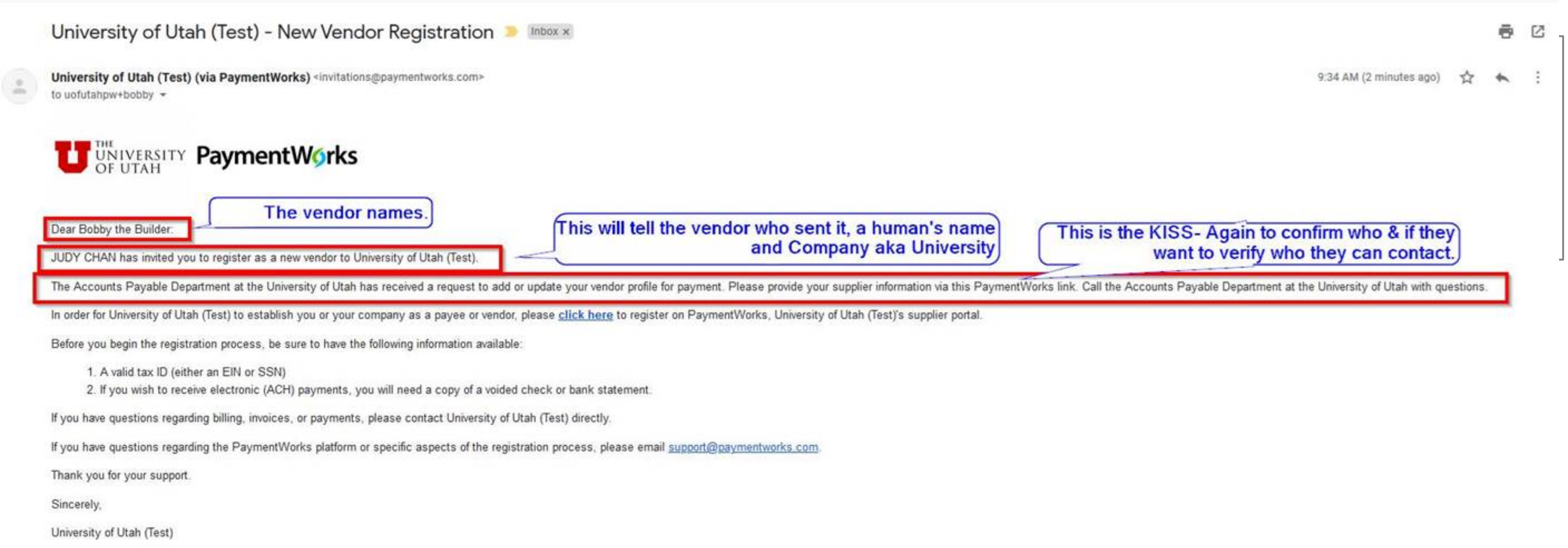
- Choose One -

Personalized Message:

*Required Field

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 begins registration via their invitation email link



University of Utah (Test) - New Vendor Registration

University of Utah (Test) (via PaymentWorks) <invitations@paymentworks.com>
to uofutahpw+bobby

9:34 AM (2 minutes ago)

The vendor names.

Dear Bobby the Builder:

This will tell the vendor who sent it, a human's name and Company aka University

JUDY CHAN has invited you to register as a new vendor to University of Utah (Test).

This is the KISS- Again to confirm who & if they want to verify who they can contact.

The Accounts Payable Department at the University of Utah has received a request to add or update your vendor profile for payment. Please provide your supplier information via this PaymentWorks link. Call the Accounts Payable Department at the University of Utah with questions.

In order for University of Utah (Test) to establish you or your company as a payee or vendor, please click here to register on PaymentWorks, University of Utah (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 University of Utah (Test) directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please email support@paymentworks.com.

Thank you for your support.

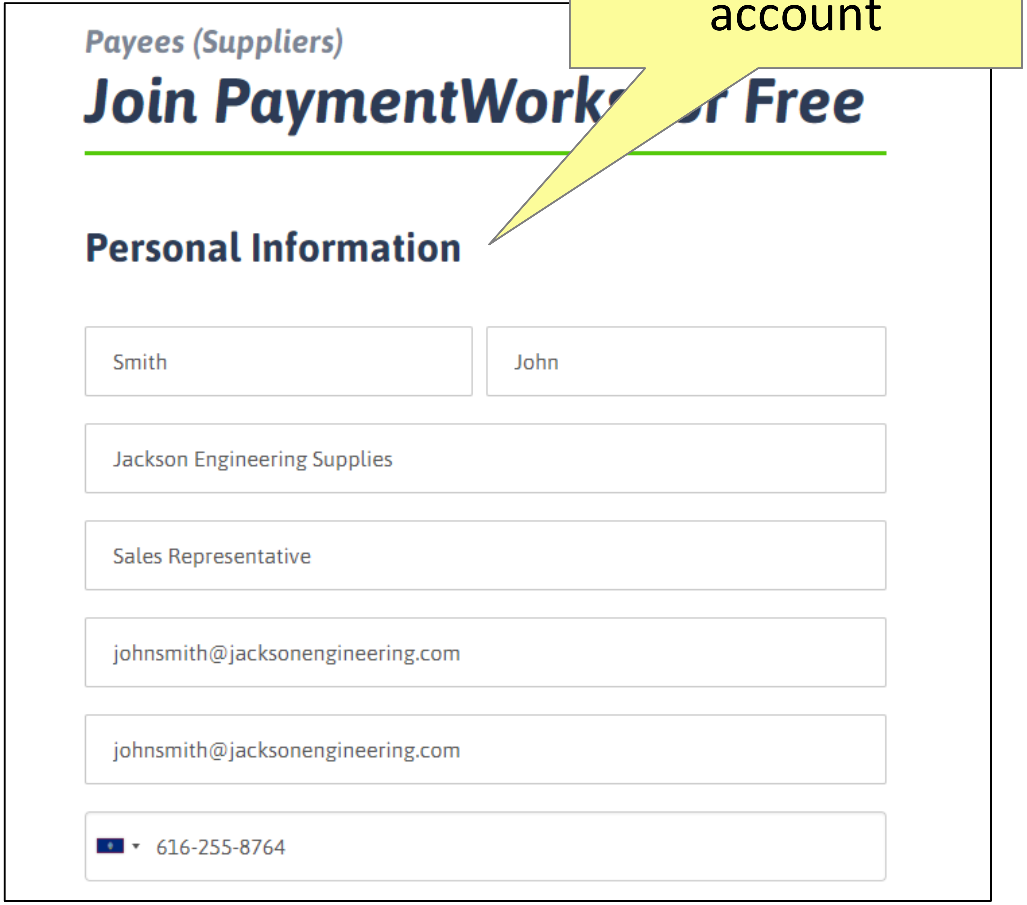
Sincerely,

University of Utah (Test)

- 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 creates a PaymentWorks account



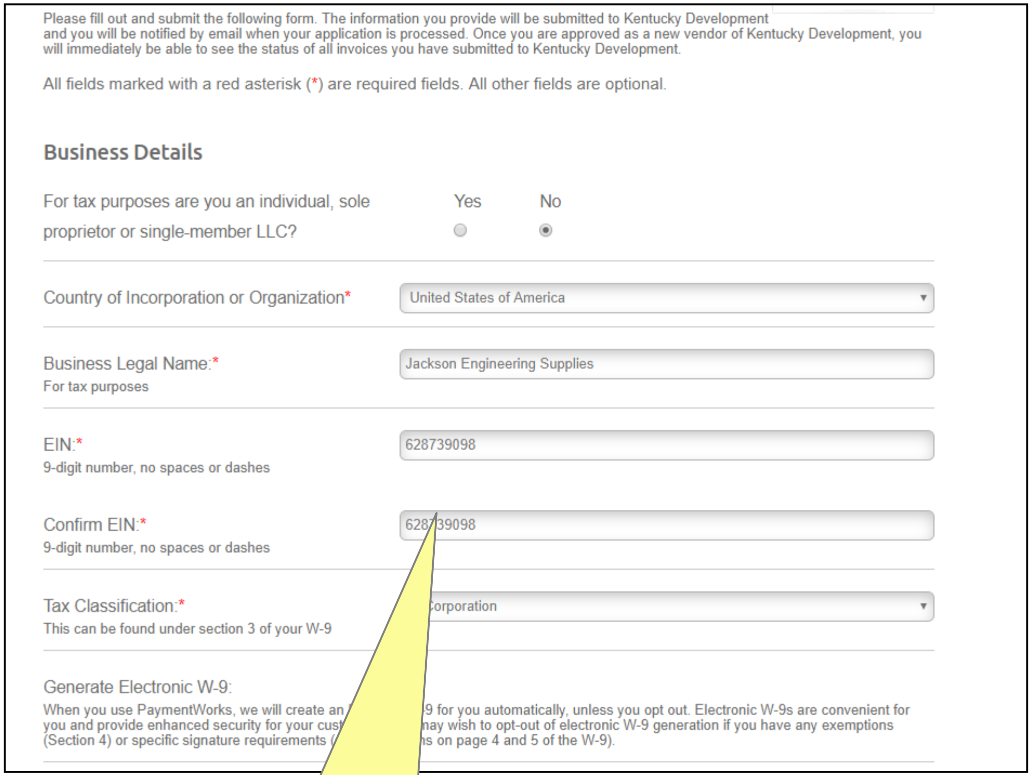
Payees (Suppliers)

Join PaymentWork r Free

Personal Information

Smith	John
Jackson Engineering Supplies	
Sales Representative	
johnsmith@jacksonengineering.com	
johnsmith@jacksonengineering.com	
616-255-8764	

- Vendor completes the online application process
- The form is currently customized for all domestic ePR and PO vendors doing business with University of Utah



Please fill out and submit the following form. The information you provide will be submitted to Kentucky Development and you will be notified by email when your application is processed. Once you are approved as a new vendor of Kentucky Development, you will immediately be able to see the status of all invoices you have submitted to Kentucky Development.

All fields marked with a red asterisk (*) are required fields. All other fields are optional.

Business Details

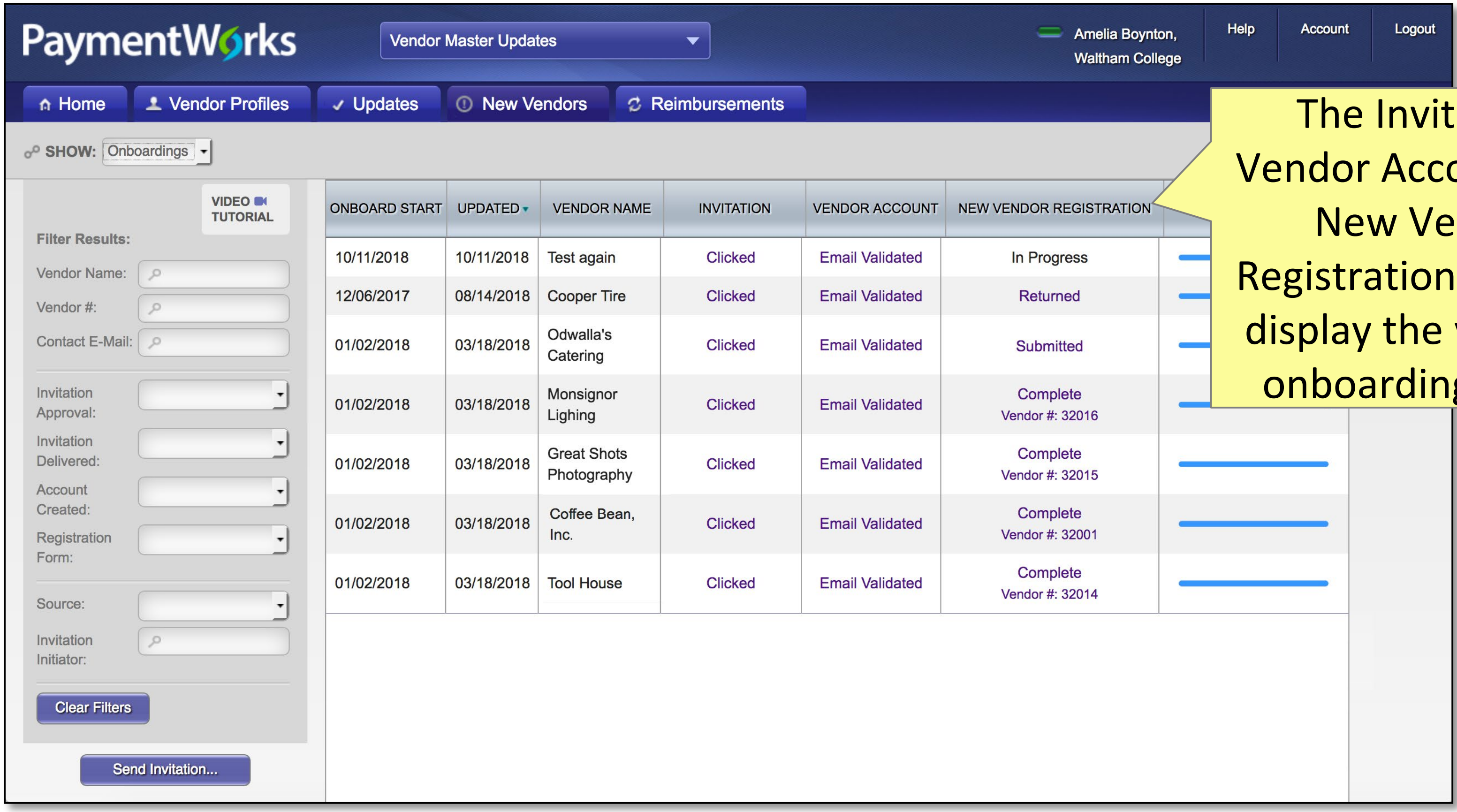
For tax purposes are you an individual, sole proprietor or single-member LLC?	Yes ○	No ●
Country of Incorporation or Organization*	United States of America ▾	
Business Legal Name:* For tax purposes	Jackson Engineering Supplies	
EIN:* 9-digit number, no spaces or dashes	628739098	
Confirm EIN:* 9-digit number, no spaces or dashes	628 39098	
Tax Classification:* This can be found under section 3 of your W-9	Corporation ▾	

Generate Electronic W-9:

When you use PaymentWorks, we will create an 9 for you automatically, unless you opt out. Electronic W-9s are convenient for you and provide enhanced security for your cust may wish to opt-out of electronic W-9 generation if you have any exemptions (Section 4) or specific signature requirements (ns on page 4 and 5 of the W-9).

Vendor completes the required form entries

- The end user has a dashboard showing all his/her vendor invitations with status updates.



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Invitation Approval:
Invitation Delivered:
Account Created:
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Source:
Invitation Initiator:
Clear Filters
Send Invitation...

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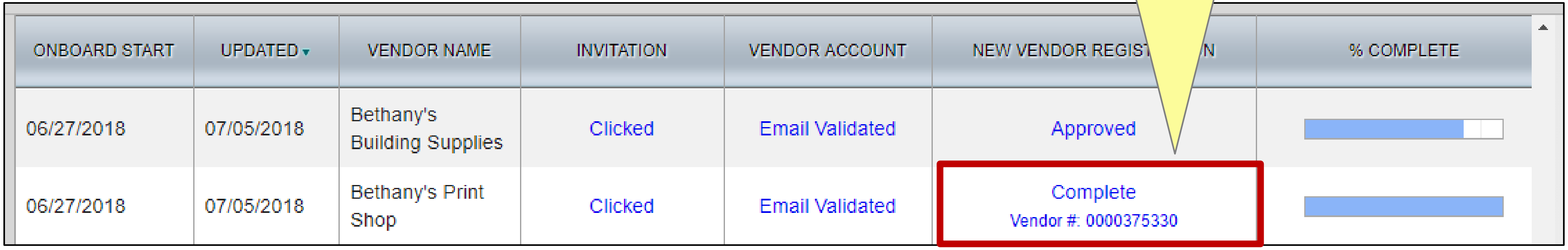
12/06/2017	08/14/2018	Cooper Tire	Clicked	Email Validated	Returned
01/02/2018	03/18/2018	Odwalla's Catering	Clicked	Email Validated	Submitted
01/02/2018	03/18/2018	Monsignor Lighing	Clicked	Email Validated	Complete Vendor #: 32016
01/02/2018	03/18/2018	Great Shots Photography	Clicked	Email Validated	Complete Vendor #: 32015
01/02/2018	03/18/2018	Coffee Bean, Inc.	Clicked	Email Validated	Complete Vendor #: 32001
01/02/2018	03/18/2018	Tool House	Clicked	Email Validated	Complete Vendor #: 32014

The Invitation, Vendor Account, and New Vendor Registration columns display the vendor's onboarding status

- When the vendor is fully registered, the University vendor number will appear in the PaymentWorks dashboard New Vendor

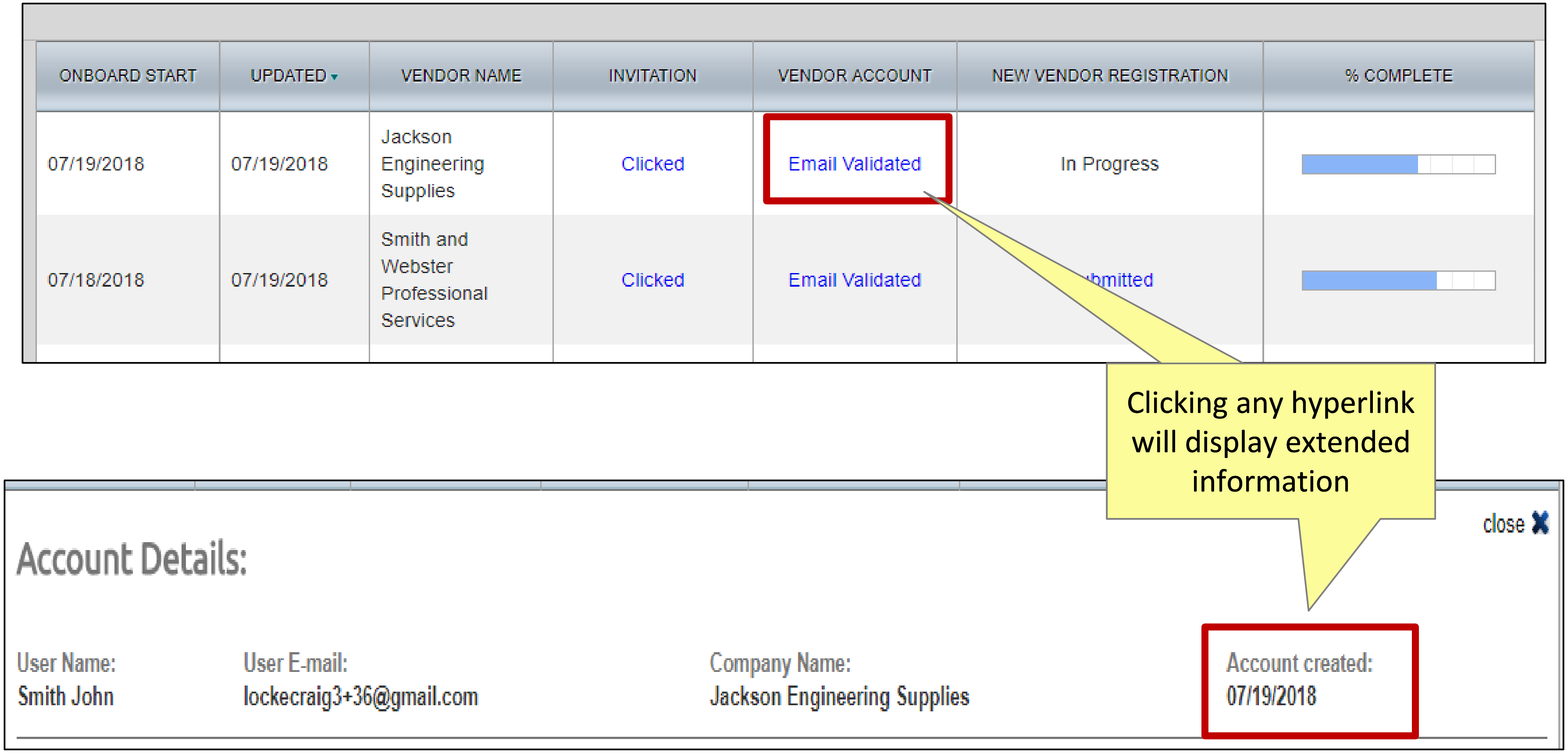
  Registration column.

When fully approved and onboarded, the vendor number will appear in your dashboard.



ONBOARD START	UPDATED ▾	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGIST N	% COMPLETE
06/27/2018	07/05/2018	Bethany's Building Supplies	Clicked	Email Validated	Approved	
06/27/2018	07/05/2018	Bethany's Print Shop	Clicked	Email Validated	Complete Vendor #: 0000375330	

Click the links at any time for more information for onboarding status



ONBOARD START	UPDATED ▾	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
07/19/2018	07/19/2018	Jackson Engineering Supplies	Clicked	Email Validated	In Progress	
07/18/2018	07/19/2018	Smith and Webster Professional Services	Clicked	Email Validated	bmitted	

Clicking any hyperlink will display extended information

close ✖

Account Details:

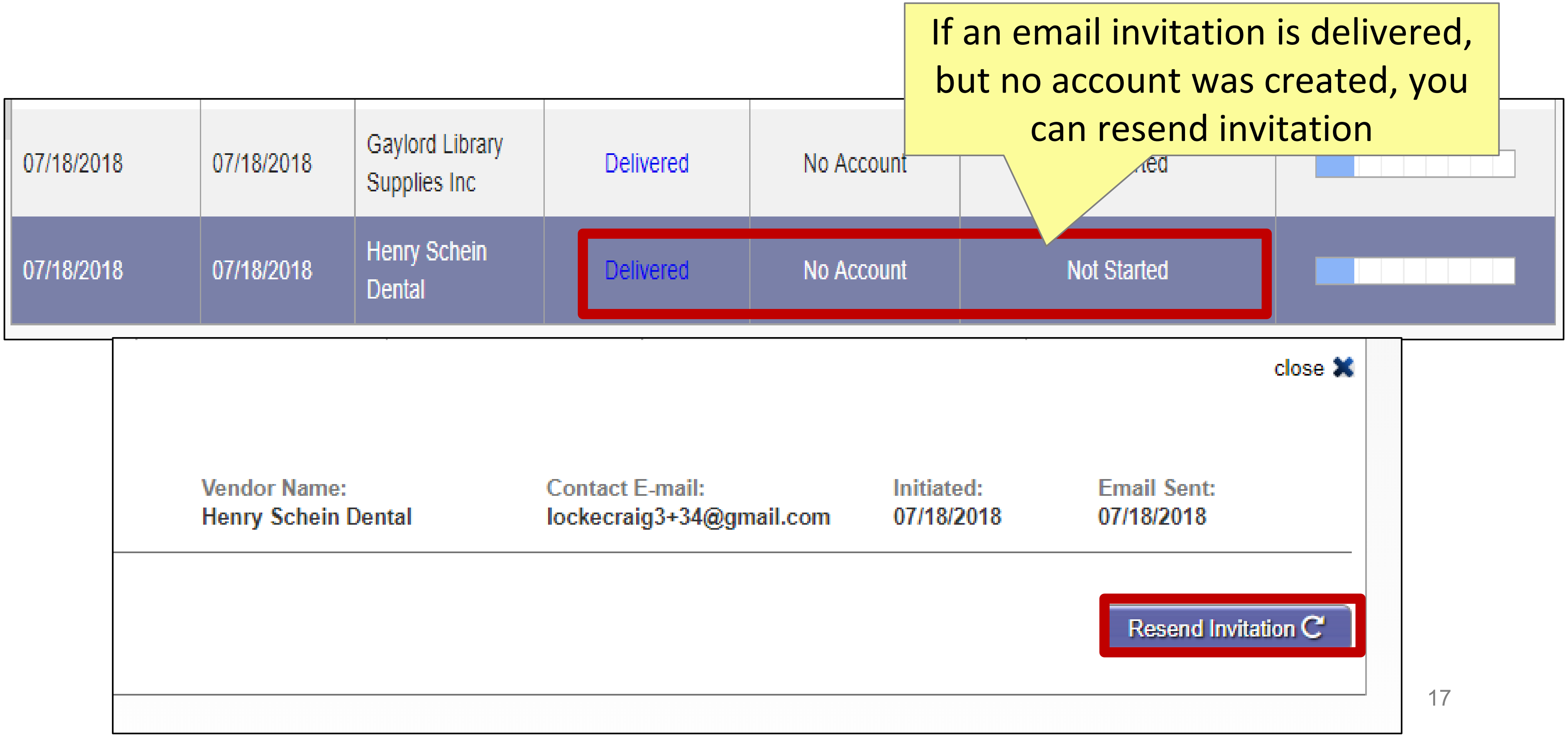
User Name: Smith John

User E-mail: lockecraig3+36@gmail.com

Company Name: Jackson Engineering Supplies

Account created: 07/19/2018

- 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

07/18/2018	07/18/2018	Gaylord Library Supplies Inc	Delivered	No Account	ted	
07/18/2018	07/18/2018	Henry Schein Dental	Delivered	No Account	Not Started	

Vendor Name:	Contact E-mail:	Initiated:	Email Sent:
Henry Schein Dental	lockecraig3+34@gmail.com	07/18/2018	07/18/2018

Frequently Asked Questions

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.

Frequently Asked Questions

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.

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