

# PaymentWorks Quick Guide



PaymentWorks is a Vendor onboarding and management system. University staff will use the system to invite vendors (both entities and individuals) who are new to the university or have not yet completed the PaymentWorks onboarding process.

All University employees and enrolled students automatically have an ARC vendor profile set up for them, eliminating the need for Schools and departments to request vendor setup for expense reimbursement.

## 1. Inviting a Vendor



Prior to inviting a vendor for onboarding via PaymentWorks, use the [ARC vendor ID Lookup](#) to see if the vendor is already setup. If the vendor already exists then there is no need to invite the vendor to connect with Columbia via PaymentWorks. If the vendor does not exist in ARC *or an update is required for an existing vendor not connected with Columbia via PaymentWorks*, you need to invite the vendor.

1. Log into [PaymentWorks](#) using Single Sign On (SSO). If you encounter an error logging in, refer to the [Resolving Your PaymentWorks SSO Authentication Error](#) job aid for instruction on resolving the issue.

The screenshot shows the PaymentWorks dashboard with four main tiles: 'Setup and Manage Supplier Portal', 'Messaging', 'Vendor Master Updates', and 'Payments'. A red arrow points to the 'Vendor Master Updates' tile. The top right corner shows user information: 'Initiator User, Columbia Test' and links for 'Help', 'Account', and 'Logout'.

2. Select the Vendor Master Updates tile.

The screenshot shows the 'Vendor Master Updates' page. On the left is a filter sidebar with fields for 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', and 'Registration Form'. Below these are 'Show Cancelled Only' and 'Source' options. A 'Send Invitation...' button is highlighted with a red box. The main area displays a list of vendors with their onboarding progress shown as a timeline. The vendors listed are Cloverdale Diner, Costco, Ambrose Spellman, and BuzzFeed News. Each vendor's progress is indicated by a horizontal line with colored dots and labels for 'INVITATION INITIATED', 'EMAIL VERIFIED - INVITATION RECEIVED', and 'REGISTRATION PROCESSED'. The 'Send Invitation...' button is highlighted with a red box.

3. Click the Send Invitation button. If you attempt to send an invitation to a vendor that has already been invited to connect, you may receive an error message, as a contact email address can only be used once.

# PaymentWorks Quick Guide

## 1. Inviting a Vendor

The Invite New Vendor window appears.

The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form contains the following fields:

- Company/Individual Name:\* (This field is required.)
- Contact E-Mail:\*
- Verify Contact E-Mail:\*
- Description of Goods and Services:\*

At the bottom right of the form are "Cancel" and "Send" buttons. A legend at the bottom left indicates "\*Required Field".

- Complete the required fields in the **Invite New Vendor** form.
  - The **Description of Goods and Services** field **should capture the business purpose, what the vendor does, and what you are paying them for**, and will be used by the Vendor Management team as part of their evaluation and approval process. **If a robust description is not provided, the onboarding of the vendor may be delayed.**
  - Leave the **Personalized Message** field blank.
  - If you are unsure what to select in the **Reason for inviting this supplier** dropdown, select *Service*.

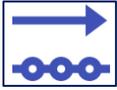
**Note:** *If you are inviting a department that is part of a larger previously connected vendor, there will only be connected vendor per Tax ID. However, the vendor can have multiple addresses and payment locations under a single Tax ID.*

- Click **Send**. The vendor will be sent the invitation.
  - If your contact at the vendor is not the individual within their organization who will be completing and submitting the request, your contact can forward the invitation email to the appropriate colleague within their organization prior to beginning account registration.
  - The vendor will also receive regular, periodic emails reminding them to complete their registration and, if needed, might receive phone calls from PaymentWorks.
  - You will receive an email from PaymentWorks when the onboarding process is complete (Check your spam or junk mail folders if you don't see PaymentWorks emails).

# PaymentWorks Quick Guide

## 2.

## Viewing Your Vendors' Onboarding Status

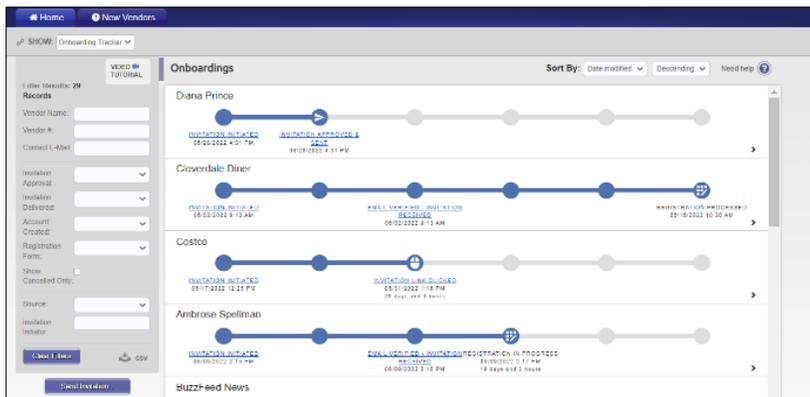


You can track the progress of the onboarding status for the vendors that you have invited. You will not be able to view the onboarding status of vendors that have been invited by others. In addition, you will not have visibility to the status of update requests submitted by connected vendors.

If you require assistance with visibility to the status of vendor onboardings or vendor update requests, please log an incident using the [self-service web form](#) or contact the [Finance Service Center](#).

### Viewing Onboarding Status

1. Log into [PaymentWorks](#) using Single Sign On (SSO).
2. Select the **Vendor Master Updates** tile. The Onboardings screen displays the status of the vendors you have invited.



**Note:** PaymentWorks also sends you email notifications when your vendors reach key onboarding events. If you do not wish to receive notifications for one or more onboarding events, you can manage them in the Manage Notifications page of your account. Refer to the PaymentWorks [Initiator Email Notifications](#) article for more information. If you will be out of the office, you can create a rule in your email application to forward your PaymentWorks email alerts to a colleague.

### Exporting Your Onboardings List

While other PaymentWorks users cannot view your invited vendors in PaymentWorks, you can export a list of vendors you have invited along with their onboard status and other information to an Excel file. You can then share the Excel file with colleagues to apprise them of your vendor onboardings if you are out of the office. In addition, you can create a rule in your email application to forward your PaymentWorks email alerts to your colleague(s).

1. Click the **CSV**  download icon from the left panel and click **OK** in the confirmation dialog box. You can use the filters in the panel to limit the data exported.



A link to the file will be sent to your email. The size of the vendor list might affect the time that the email is sent.



2. Click the link in the email to download the file.

**Note:** If a colleague with active PaymentWorks invitations has left the University, you can click the **Help** link from the upper right corner in PaymentWorks and then click **Contact Support** to submit a request to gain access to the former colleague's onboarding list.

# PaymentWorks Quick Guide

## 2.

## Viewing Your Vendors' Onboarding Status

### Vendor Reminder Emails

Reminder emails are automatically sent to vendors when:

- Invitations are pending a response at 1, 3, 7, 14, 21, 28, and 35 days after your invitation is received by the vendor.
- The New Vendor Registration (NVR) is started but not yet submitted at 1, 3, 7, 14, 21, 28, 35 days after the is NVR started by the vendor.
- The vendor account is registered but not activated at 3, 7, and 14 days after the vendor registers the account.

### Onboarding Status Milestones

The **Invitation Status** changes as it is processed, according to the table below:

<b>Invitation Initiation</b>	
<b>Invitation Initiated</b>	Initiator sent an invitation.
<b>Invitation Cancelled</b>	Invitation was cancelled by the initiator or another user.
<b>Invitation Sent</b>	
<b>Invitation Sent</b>	Invitation was emailed to the Vendor.
<b>Invitation Receipt</b>	
<b>Invitation Email Opened</b>	Payee opened the email invitation.
<b>Invitation Link Clicked</b>	Vendor clicked on the link in the email invitation to register with PaymentWorks.
<b>Email Verified - Invitation Received</b>	Vendor verified their email address.
<b>Vendor Account Confirmed</b>	Vendor set up an account with PaymentWorks
<b>Registration Submission</b>	
<b>Registration in Progress</b>	Vendor began to fill out the New Vendor Request (NVR).
<b>Registration Returned – Pending Resubmission</b>	Vendor’s NVR was returned and the Vendor needs to make changes and resubmit the NVR.
<b>Registration Submitted</b>	Vendor completed and submitted their registration form.
<b>Registration Approval</b>	
<b>Registration Submitted – Pending PaymentWorks Review</b>	Vendor completed and submitted their registration form. PaymentWorks is validating the Vendor’s banking information.
<b>Registration Submitted – Pending Vendor Response</b>	Vendor completed and submitted their registration form. PaymentWorks called the Vendor and left a message, and the Vendor needs to return the phone call.
<b>Registration Submitted – Pending Internal Review</b>	Vendor completed and submitted their registration form. PaymentWorks validated the bank account, and the registration is now waiting for internal review from Columbia.
<b>Registration Resubmitted – Pending PaymentWorks Review</b>	Vendor completed and resubmitted their registration form. PaymentWorks is validating the Vendor’s banking information.
<b>Registration Resubmitted – Pending Vendor Response</b>	Vendor completed and resubmitted their registration form. PaymentWorks called the Vendor and left a message, and the Vendor needs to return the phone call.
<b>Registration Resubmitted – Pending Internal Review</b>	Vendor completed and resubmitted their registration form. PaymentWorks validated the bank account, and the registration is now waiting for internal review from Columbia.
<b>Registration Rejected</b>	New vendor registration form was reviewed and rejected Columbia.
<b>Registration Approved</b>	New vendor registration form was reviewed and approved by Columbia.
<b>Onboarding Completion</b>	
<b>Registration Processed</b>	Information from the new vendor registration form was exported for integration into ARC.
<b>Onboarding Complete</b>	Vendor is set up for payment. The new vendor registration is in ARC and connected (linked) to PaymentWorks.

Once the registration or update has been fully approved, a vendor profile will be created in ARC via system integration. Vendor profiles will be created and updated via the daily ARC intra-day batch processing scheduled at 8:00 am, 10:00 am, 12:00 pm, 3:00 pm and 5:00 pm.

# PaymentWorks Quick Guide

## 3.

## Resending or Canceling an Invitation



If your vendor is not responding to your invitation or you inadvertently sent the invitation to the wrong email address, you can resend the invitation from the Onboardings screen. You also have the option to cancel the invitation to the vendor. You can only resend or cancel an invitation if the vendor has not begun the registration process. If you cancel the invitation, the onboarding process will be terminated, but you can initiate a new invitation, if needed.

1. Log into [PaymentWorks](#) using Single Sign On (SSO).
2. Select the **Vendor Master Updates** tile. The Onboardings screen displays the status of the vendors you have invited.

In the example highlighted above, the invitation has been clicked by the vendor but they have not yet submitted their registration. If necessary, you can resend the invitation or cancel the invitation.

3. Click to **Expand** the Onboarding status for the vendor.
4. Click the **Invitation Detail** tab.

5. Click the **Resend Invitation** to resend the invitation. The Resend New Vendor Invitation window appears. **Note:** If you click **Cancel Invitation**, a confirmation window appears. If you cancel, the onboarding process is terminated. You can cancel an invitation anytime in the onboarding process up until their New Vendor Request has been submitted by the vendor.

6. You can edit the invitation fields, including the Contact E-Mail. Click **Send** to resend the invitation.