

# PaymentWorks Instructions (long form)



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## Who must be invited to and register within PaymentWorks?

**Apart from the list below, all individuals and entities who are to be paid through Accounts Payable must complete the PaymentWorks onboarding process.** This is true regardless of funding source and whether the payee is a new or existing vendor.

PaymentWorks is the portal through which these vendors provide their business information, including legal names, tax identifications and filing statuses, payment preferences, physical and email addresses, contact names, diversity data, and more.

Vendors also use the portal to maintain their business information and check invoice payment statuses.

**The following entities and individuals do not need to complete the PaymentWorks onboarding process:**

- Current faculty, staff, and students who are being paid for something connected to their work or studies at Kent State (e.g., reimbursements, travel advances, gift card advances, petty cash reimbursements, awards, etc.)
- Prospective employees and students (including student athletes) who are being reimbursed for travel expenses related to interviews or campus visits
- Individuals and entities whose payments will be charged, in full, to agency indexes (i.e., indexes starting with an "8")
- Individuals and entities who are being sent refunds for such things as conference fees, rental space, etc.

To clarify, a *reimbursement* refers to a payment made by the university to an individual who incurred allowable and necessary business expenses on behalf of the university. A *refund* refers to a payment made to return funds to an individual/entity who previously paid them to the university.

## Who is responsible for inviting vendors to PaymentWorks?

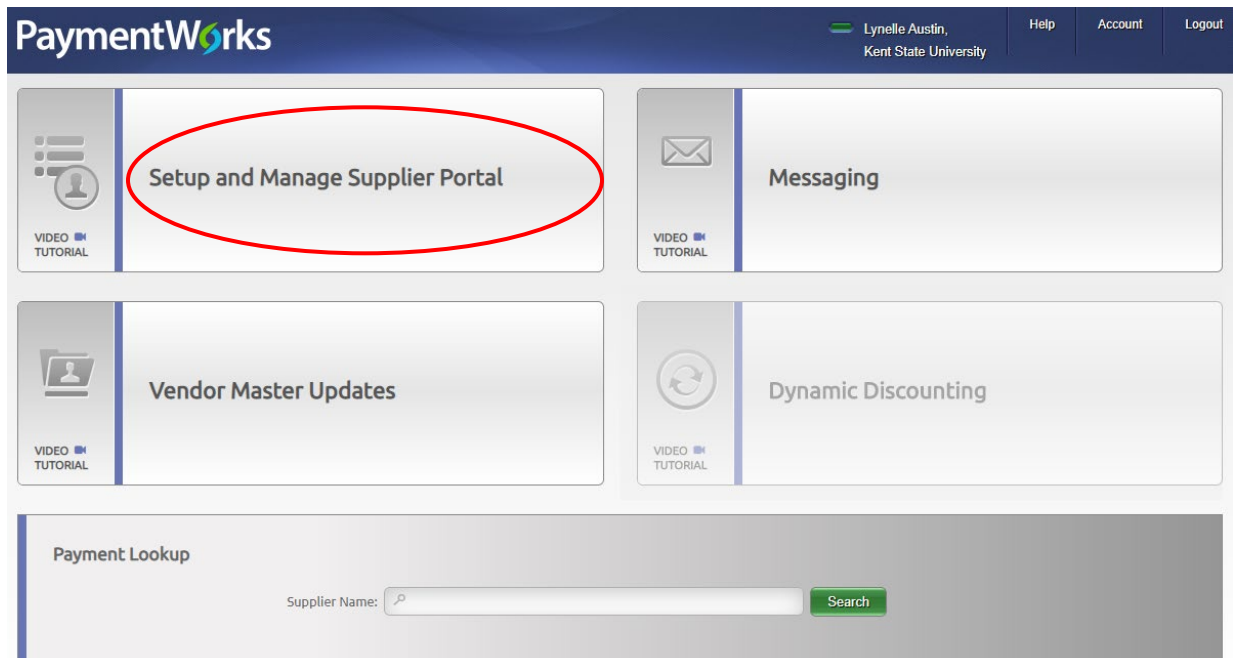
**Each department is responsible for inviting its own vendors, ensuring that they have completed the onboarding process, and have registered the remittance address that appears on their invoices.**

Vendors must complete the PaymentWorks onboarding process before they can be added to the vendor master file. Accounts Payable can only issue payment after a vendor has registered the remittance address that appears on their invoice. It is advisable that departments invite vendors to register before purchases are made and services are provided, in order to ensure that prospective vendors are in compliance with university policies and procedures.

As of April 15, 2020, payment requests that are submitted without their vendors (both existing and new) having completed the PaymentWorks onboarding process will be returned to the initiating departments.

## Has my vendor completed the PaymentWorks onboarding process?

1. Login to PaymentWorks (<https://paymentworks.com/login/saml/?idp=kentstate>) using your Flashline credentials.
2. Click on Setup and Manage Supplier Portal.



3. Click on the Suppliers tab.

The screenshot shows the PaymentWorks interface with the 'Suppliers' tab selected. The 'Welcome Page' is displayed, featuring the Kent State University logo and a message about the automatic creation of a Welcome Page for suppliers. The URL [www.paymentworks.com/kentstateuniversi-6/](http://www.paymentworks.com/kentstateuniversi-6/) is provided. The 'Suppliers' tab is highlighted with a red circle.

4. Search for your vendor using the gray search section on the left.

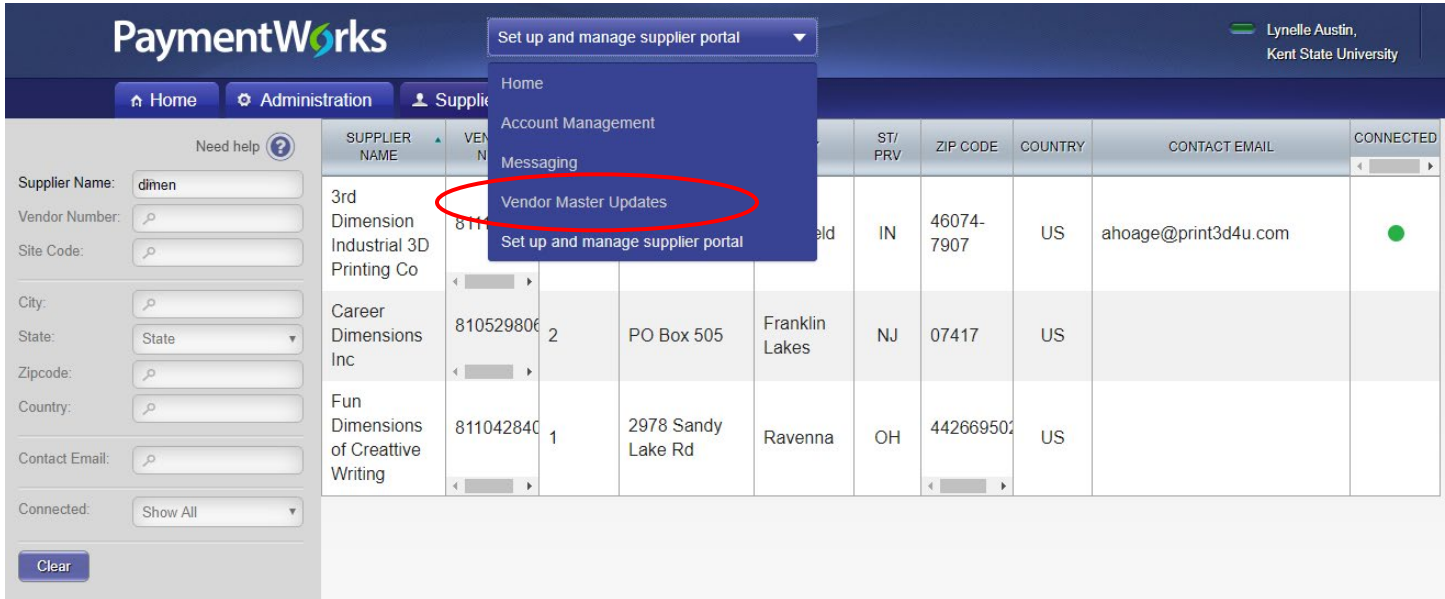
The screenshot shows the PaymentWorks interface with the 'Suppliers' tab selected. A search for 'Dimension' is performed in the 'Supplier Name' field. The results table lists three suppliers: Dimension Industrial 3D Printing Co, Career Dimensions Inc, and Fun Dimensions of Creative Writing. The 'Supplier Name' field is highlighted with a red circle.

SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Dimension Industrial 3D Printing Co	811121544	1	17075 Oak Ridge Rd	Westfield	IN	46074-7907	US	ahoage@print3d4u.com	
Career Dimensions Inc	810529806	2	PO Box 505	Franklin Lakes	NJ	07417	US		
Fun Dimensions of Creative Writing	811042840	1	2978 Sandy Lake Rd	Ravenna	OH	442669502	US		

5. How to read the search results:
  - A green dot in the CONNECTED column indicates that the vendor has completed the PaymentWorks onboarding process and has registered the address shown as a remittance address.
    - IMPORTANT If the remittance address shown does not match the one on the invoice, the vendor must add that address to their PaymentWorks profile. Email [vendmgmt@kent.edu](mailto:vendmgmt@kent.edu) for assistance when this occurs.
  - An empty search result or a result that lacks a green dot in the CONNECTED column indicates that the vendor has not completed the PaymentWorks onboarding process.
6. If your vendor has not completed the PaymentWorks onboarding process, check to see if they have been invited to register.

## Has my vendor been invited to PaymentWorks?

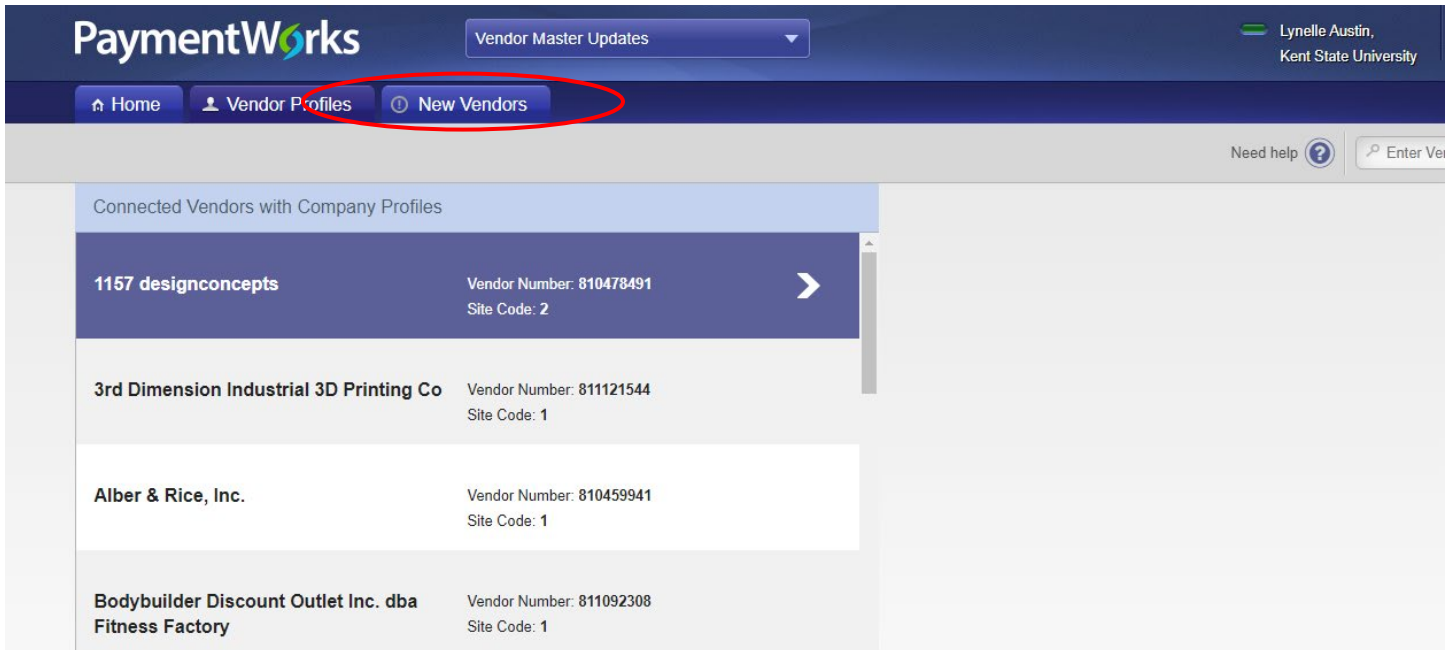
1. Navigate to Vendor Master Updates from either the Home screen or the dropdown menu at the top of the page.



The screenshot shows the PaymentWorks interface. At the top, there is a navigation bar with the PaymentWorks logo and a user profile for Lynelle Austin, Kent State University. Below the navigation bar, there is a dropdown menu with the following options: Home, Account Management, Messaging, Vendor Master Updates (highlighted with a red circle), and Set up and manage supplier portal. The main content area displays a table of suppliers with columns: SUPPLIER NAME, VENDOR NUMBER, ST/PRV, ZIP CODE, COUNTRY, CONTACT EMAIL, and CONNECTED. The table lists three suppliers: 3rd Dimension Industrial 3D Printing Co, Career Dimensions Inc, and Fun Dimensions of Creative Writing.

SUPPLIER NAME	VENDOR NUMBER	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
3rd Dimension Industrial 3D Printing Co	811121544	IN	46074-7907	US	ahoage@print3d4u.com	●
Career Dimensions Inc	810529806	NJ	07417	US		
Fun Dimensions of Creative Writing	811042840	OH	442669507	US		

2. Click on the New Vendors tab.



The screenshot shows the PaymentWorks interface with the 'New Vendors' tab selected. The navigation bar at the top includes the PaymentWorks logo, a dropdown menu for 'Vendor Master Updates', and a user profile for Lynelle Austin, Kent State University. Below the navigation bar, there is a tabbed interface with three tabs: Home, Vendor Profiles, and New Vendors (highlighted with a red circle). The main content area displays a list of connected vendors with company profiles. The list includes: 1157 designconcepts, 3rd Dimension Industrial 3D Printing Co, Alber & Rice, Inc., and Bodybuilder Discount Outlet Inc. dba Fitness Factory.

Company Name	Vendor Number	Site Code
1157 designconcepts	810478491	2
3rd Dimension Industrial 3D Printing Co	811121544	1
Alber & Rice, Inc.	810459941	1
Bodybuilder Discount Outlet Inc. dba Fitness Factory	811092308	1

3. All vendors who have been invited to register with PaymentWorks in order to connect with Kent State are listed on this page. Search for your vendor using the gray search section on the left.

**PaymentWorks** Vendor Master Updates

Lynelle Austin, Kent State University

Home Vendor Profiles New Vendors

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
02/12/2020	02/17/2020	Dennis Alber Excavating	Opened	No Account	Not Started	<div><div></div></div>
01/31/2020	02/17/2020	Paragon Design & Display	Clicked	Email Validated	Complete Vendor # 810874206	<div><div></div></div>
02/03/2020	02/17/2020	The Ohio State University	Clicked	No Account	Not Started	<div><div></div></div>
02/17/2020	02/17/2020	Environments 4 Business, LLC	Delivered	No Account	Not Started	<div><div></div></div>
02/14/2020	02/17/2020	Teegardin Enterprises LLC dba Coldlassers.org	Opened	No Account	Not Started	<div><div></div></div>
		global				

4. If your vendor appears in the search results, they have been invited to register.
5. If your vendor does not appear in the search results, you must invite them.

## How do I invite a vendor to PaymentWorks?

1. Click on the Send Invitation button that is beneath the gray search section on the left side of the New Vendor screen.

The screenshot shows the PaymentWorks interface. At the top, there's a header with the logo, a 'Vendor Master Updates' dropdown, and user information for Lynelle Austin at Kent State University. Below the header is a navigation bar with 'Home', 'Vendor Profiles', and 'New Vendors'. The 'New Vendors' section is active, showing a 'SHOW: Onboardings' dropdown and a table with columns: ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. On the left, there's a 'Filter Results' section with various search criteria like Vendor Name (containing 'grand'), Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. Below these filters are 'Clear Filters' and 'Send Invitation...' buttons. The 'Send Invitation...' button is circled in red.

2. Complete the Invite New Vendor form with the following information:
  - Company/Individual Name - Vendors include both entities and individuals.
  - Contact E-mail - Vendor contact email address.
  - Initiator Phone - Your phone number.
  - Reason for Inviting the Supplier - Choose Product, Services, or Product and Services. (If you are issuing an award, choose Services.)
  - Independent Contractor - If your vendor is an independent contractor, you must obtain approval via the HR Independent Contractor workflow before inviting them to PaymentWorks. If your vendor is not an independent contractor, you may leave this box blank.
  - Description of Goods and Services - Provide a brief description of the goods and/or services that the vendor will be providing.
  - Personalized Message - Enter a message that will be included on the invitation. This field is limited to 280 characters, including spaces. Here are examples of the types of messages you may want to enter:

***Kent State University uses a vendor portal to ensure that business names, EINs, and banking information are transmitted within a secure environment. Thank you for registering so that we can submit invoice #123 for payment.***

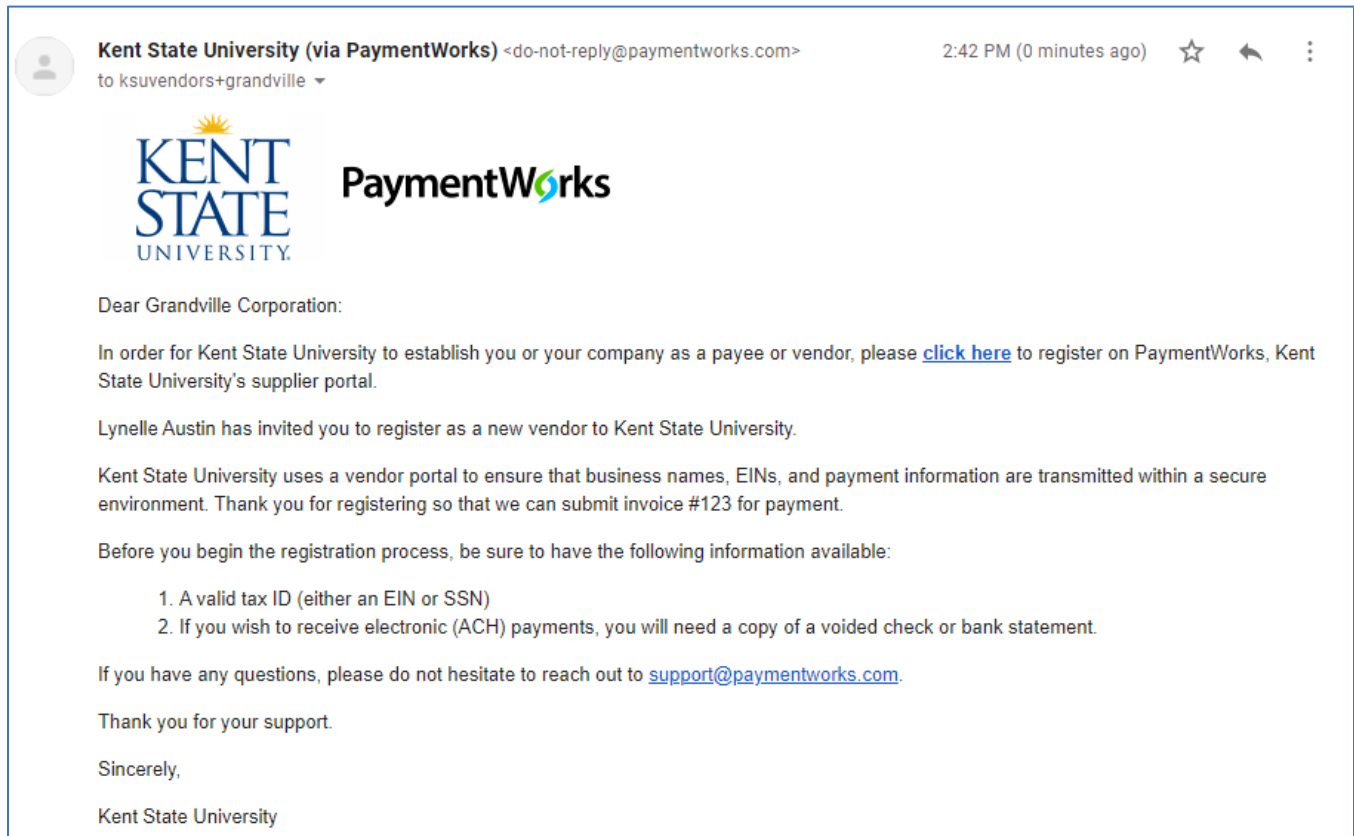
***OR***

***Hello Susan! This is the required vendor onboarding portal that I mentioned during our phone call today.***

The image shows two side-by-side screenshots of the 'Invite New Vendor' form. The left screenshot displays the top section of the form, including fields for 'Company/Individual Name', 'Contact E-Mail', 'Verify Contact E-Mail', 'Initiator Phone Number', and 'Reason for Inviting the Supplier'. The right screenshot displays the bottom section, featuring a 'Product' dropdown, a checkbox for 'Independent Contractor', a 'Description of Goods and Services' text field, and a 'Personalized Message' text area. Both screenshots include 'Cancel' and 'Send' buttons at the bottom right.

This screenshot shows the 'Personalized Message' text area of the 'Invite New Vendor' form. A red text overlay reads '280 characters (including spaces)'. The form also includes a checkbox for 'Independent Contractor', a 'Description of Goods and Services' field, and 'Cancel' and 'Send' buttons at the bottom.

3. Click Send. The image below shows what the invitation email looks like.



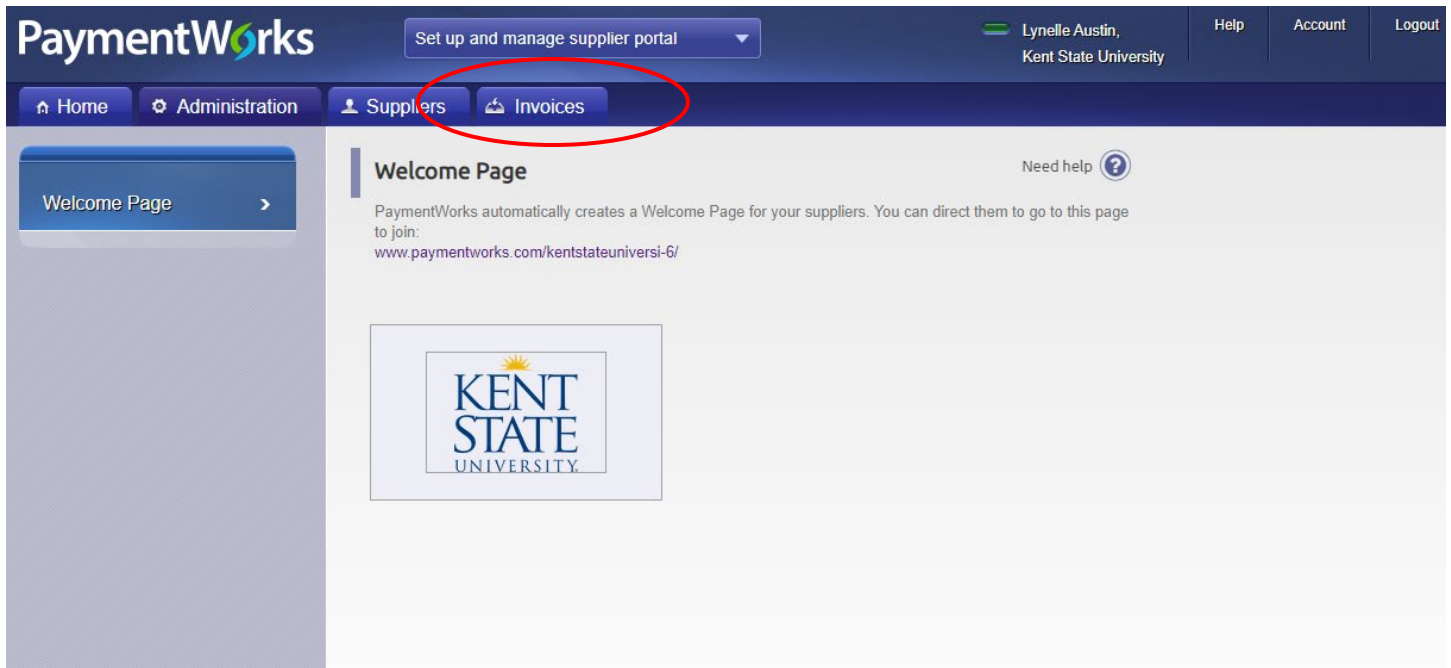
## How do I check the status of my invitation and my vendor's registration?

1. Within the Vendor Master Updates / New Vendors screen, search for your vendor using the gray search section on the left.
2. The statuses listed in the INVITATION, VENDOR ACCOUNT, and NEW VENDOR REGISTRATION columns will change as your invitation is processed and the vendor completes the onboarding process.
  - Invitation
    - Pending Approval – Invitation is pending approval by Accounts Payable
    - Sent – Invitation has been emailed to the vendor
    - Delivered – Email has reached the vendor's inbox
    - Opened – Email has been opened
    - Clicked – Invitation link has been clicked
  - Vendor Account
    - Created – Vendor has created a PaymentWorks account
    - Confirmed – Vendor has verified its email address (clicked on the link that is sent to the vendor after it creates a PaymentWorks account)
  - New Vendor Registration
    - Submitted – Vendor has completed and submitted its registration form
    - Complete – Accounts Payable has approved supplier. Vendor number (Banner ID) will be displayed. At this point, you can initiate a purchase request or submit a payment request (which includes the vendor number) for that vendor.

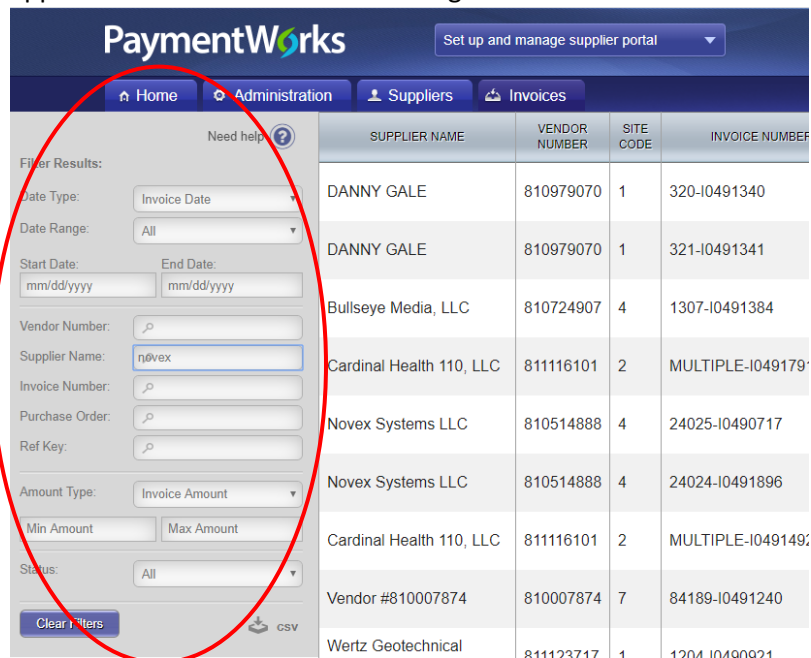
<div>Home Vendor Profiles New Vendors</div> <div>SHOW: Onboardings</div>							
Filter Results:		ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION
Vendor Name: <input type="text"/>		02/17/2020	02/17/2020	Grandville Corporation	Clicked	No Account	Not Started
Vendor #: <input type="text"/>		02/17/2020	02/17/2020	Environments 4 Business, LLC	Clicked	Email Validated	In Progress
Contact E-Mail: <input type="text"/>		02/12/2020	02/17/2020	Dennis Alber Excavating	Opened	No Account	Not Started
Invitation Approval: <input type="text"/>		01/31/2020	02/17/2020	Paragon Design & Display	Clicked	Email Validated	Complete Vendor #: 810874206
Invitation Delivered: <input type="text"/>		02/05/2020	02/17/2020	The Ohio State University	Clicked	No Account	Not Started
Account Created: <input type="text"/>		02/14/2020	02/17/2020	Teegardin Enterprises LLC dba Coldlassers.org	Opened	No Account	Not Started
Registration Form: <input type="text"/>		02/12/2020	02/16/2020	global Promotions & Incentives	Clicked	No Account	Not Started
Source: <input type="text"/>		02/05/2020	02/16/2020	Williams Fence and Contracting	Clicked	No Account	Not Started
Invitation Initiator: <input type="text"/>							
Clear Filters							
Send Invitation...							

## How do I use PaymentWorks to view invoice payment statuses?

1. Within the Setup and Manage Supplier Portal section, click on the Invoices tab.



2. Search for your vendor using the gray search section on the left. Invoices that have been keyed will appear in the search results on the right.



3. A STATUS will appear for each invoice:

- Approved - The invoice has been keyed and will be processed on the check run that is listed in the SCHEDULED PAY DATE column.
- Paid - The invoice has been paid as of the date listed in the ACTUAL PAY DATE column.

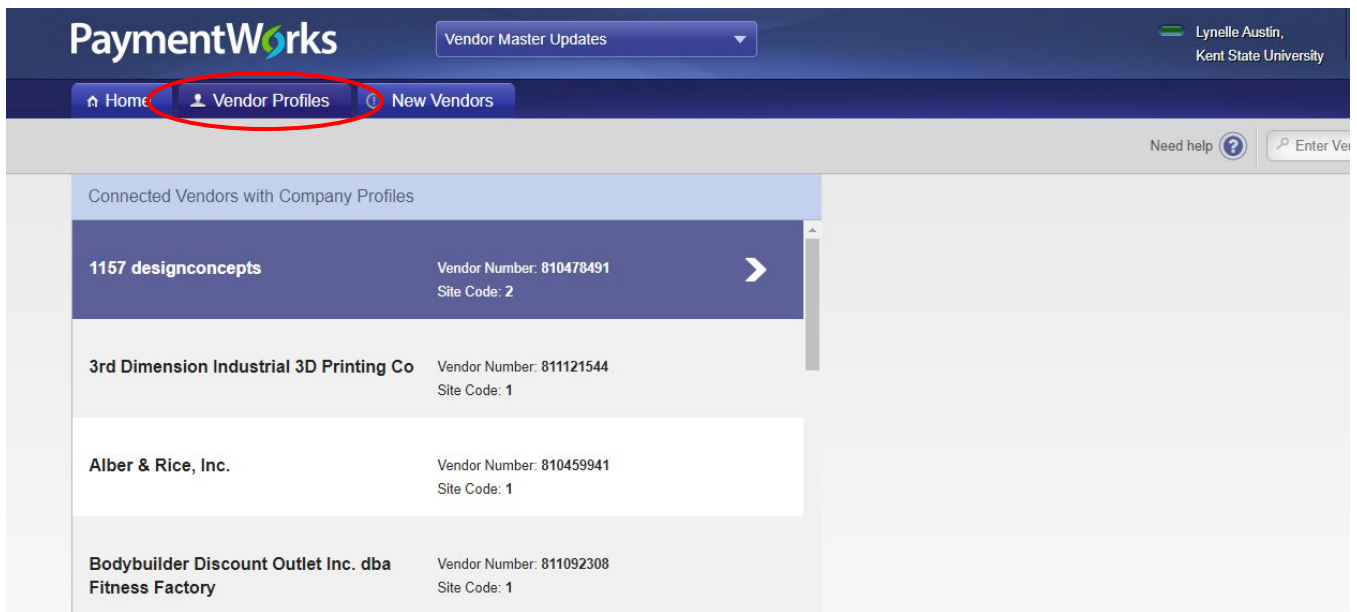
SUPPLIER NAME	VENDOR NUMBER	SITE CODE	INVOICE NUMBER	DATE	AMOUNT	PAID AMOUNT	PURCHASE ORDER	STATUS	SCHEDULED PAY DATE	ACTUAL PAY DATE
Novex Systems LLC	810514888	4	24024-I0491896	01/29/2020	USD \$1548.12			Approved	02/18/2020	
Novex Systems LLC	810514888	4	24025-I0490717	01/29/2020	USD \$1690.50	USD \$1690.50		Paid	02/06/2020	02/06/2020
Novex Systems LLC	810514888	4	23563-I0490640	11/14/2019	USD \$1419.00	USD \$1419.00		Paid	02/05/2020	02/05/2020

4. Click on invoices that show Paid statuses in order to view their check numbers (Payment Document#.)

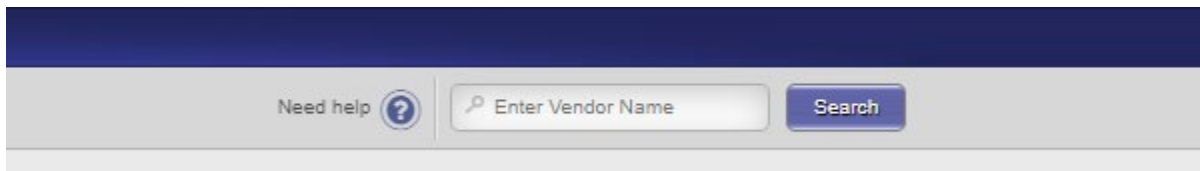
SUPPLIER NAME	VENDOR NUMBER	SITE CODE	INVOICE NUMBER	DATE	AMOUNT	PAID AMOUNT	PURCHASE ORDER	STATUS	SCHEDULED PAY DATE	ACTUAL PAY DATE
Novex Systems LLC	810514888	4	24024-I0491896	01/29/2020	USD \$1548.12			Approved	02/18/2020	
<b>Novex Systems LLC (Vendor Number: 810514888; Site Code: 4)</b> <span>close ✕</span>										
Invoice # 24025-I0490717		Date 01/29/2020		Invoice Amount USD \$1690.50		Actual Paid Amount USD \$1690.50		Purchase Order		Ref Key
STATUS PAID		Scheduled Pay Date 02/06/2020		Actual Pay Date 02/06/2020		Pay Document # 75115584		Status Code paid		
Novex Systems LLC	810514888	4	23563-I0490640	11/14/2019	USD \$1419.00	USD \$1419.00		Paid	02/05/2020	02/05/2020

## How do I use PaymentWorks to view a vendor's profile?

1. Within the Vendor Master Updates screen, click on the Vendor Profiles tab.



2. Search for your vendor in the search box that is in the upper right section of the screen.



3. Click on the name of your vendor to see the profile information:
  - Company Info – name, address, tax classification, etc.
  - Custom Fields – KSU-specific questions including whether the vendor accepts credit cards and whether it charges a fee for credit card payments