

PaymentWorks

Vendor Management Portal

Presented by
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What is PaymentWorks?

Vendor Onboarding

Vendor Maintenance

PaymentWorks

Payment Status

Vendor Profiles

Who is involved in the PaymentWorks onboarding process?

- **Department** – initiates vendor invitation
- **Accounts Payable** – reviews and approves vendor invitation and registration
- **Vendor** – completes a questionnaire to provide business information, updates when necessary
- **PaymentWorks** – provides technical support for vendors

PaymentWorks

Who should be invited to PaymentWorks?

All individuals and entities who are to be paid through Accounts Payable EXCEPT...

- Current faculty, staff, and students who are being paid for something connected to their work or studies at Kent State
- Prospective employees and students who are being reimbursed for travel expenses related to interviews or campus visit
- Individuals and entities whose payments will be charged in full to agency indexes
- Individuals and entities who are being sent refunds for such things as conference fees, rental space, etc.

When should vendors be invited to PaymentWorks?

- **Goal**

- Vendor completes PaymentWorks onboarding process before goods are purchased/services are provided

- **Required**

- Vendor completes PaymentWorks onboarding process before department submits payment request to Accounts Payable

- **April 15, 2020**

- Payment requests submitted for vendors that have not completed PaymentWorks onboarding process will be returned to requesters

What are the benefits of using PaymentWorks?

- **Security**

- Information provided in a secure environment
- Vendor is responsible for safeguarding its login info

- **Compliance**

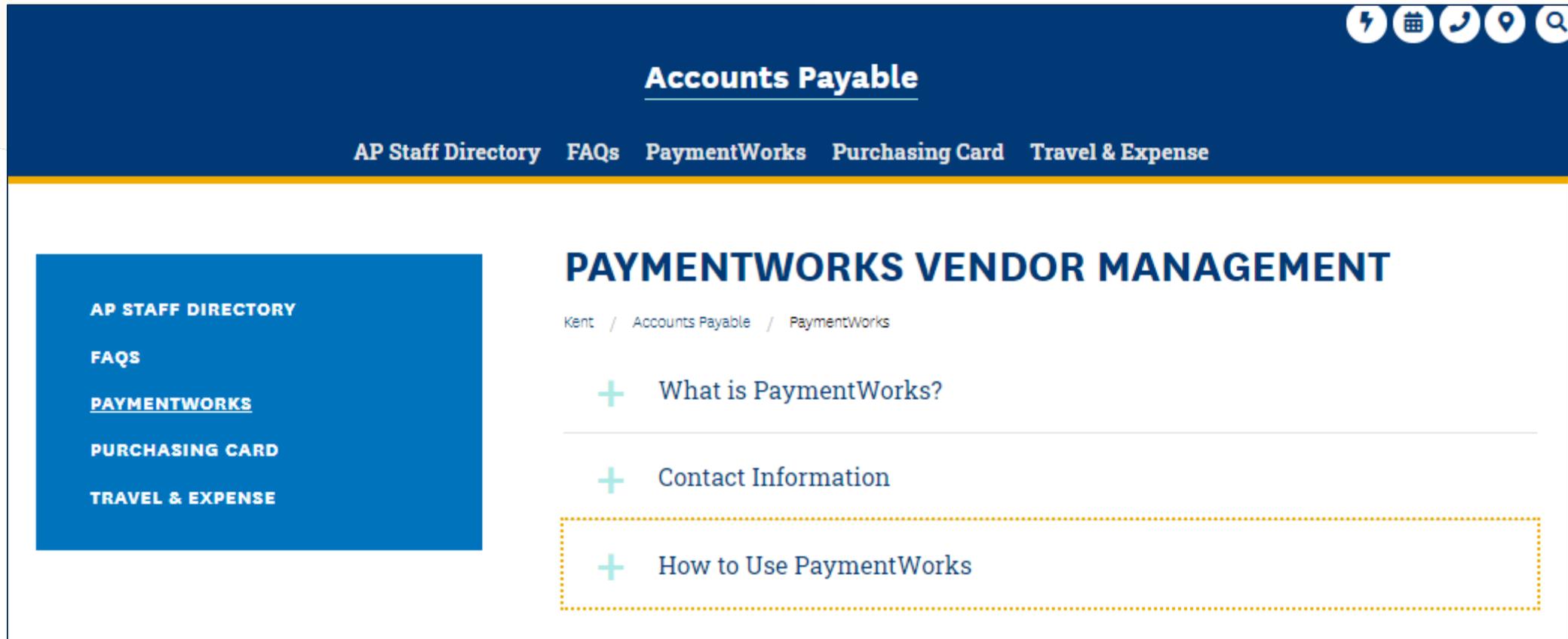
- TIN verification
- Sanction list alerts
- EEOC, ADA, etc.

What are the benefits of using PaymentWorks?

- Improved information gathering
- Reduction in vendor setup time
- Vendors (and you!) can check payment status
- Departments can view vendor profile information (tax status, credit card acceptance, etc.)

PaymentWorks Resources

www.kent.edu/accounts payable/vendor-management



The screenshot shows a website interface for 'Accounts Payable'. At the top right, there are icons for a lightning bolt, calendar, phone, location pin, and search. Below these is the title 'Accounts Payable' and a navigation menu with links for 'AP Staff Directory', 'FAQs', 'PaymentWorks', 'Purchasing Card', and 'Travel & Expense'. On the left side, there is a blue sidebar menu with links for 'AP STAFF DIRECTORY', 'FAQS', 'PAYMENTWORKS' (which is underlined), 'PURCHASING CARD', and 'TRAVEL & EXPENSE'. The main content area is titled 'PAYMENTWORKS VENDOR MANAGEMENT' and includes a breadcrumb trail: 'Kent / Accounts Payable / PaymentWorks'. Below the breadcrumb, there are three expandable items, each with a green plus sign: 'What is PaymentWorks?', 'Contact Information', and 'How to Use PaymentWorks'. The third item, 'How to Use PaymentWorks', is highlighted with a dashed yellow border.

PaymentWorks Resources

www.kent.edu/accounts payable/vendor-management

+ What is PaymentWorks?

+ Contact Information

- How to Use PaymentWorks

Link is also on Flashline in Employee Workflows section

PAYMENTWORKS (CLICK TO LOGIN)

PAYMENTWORKS INSTRUCTIONS

- 1 [Long form](#) (includes screenshots)
- 2 [Short form](#) (printable version of instructions listed below)
- 3 Slides - [PowerPoint](#) and [pdf](#)
- 4 [FAQs](#)
- 5 [Video](#)

Has my vendor completed the PaymentWorks onboarding process?

1. Login to PaymentWorks
2. Click on **Setup and Manage Supplier Portal**.
3. Click on the **Suppliers** tab.
4. Search for your vendor using the gray search section on the left.
5. Vendors that have a **green dot** in the **CONNECTED** column have 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.

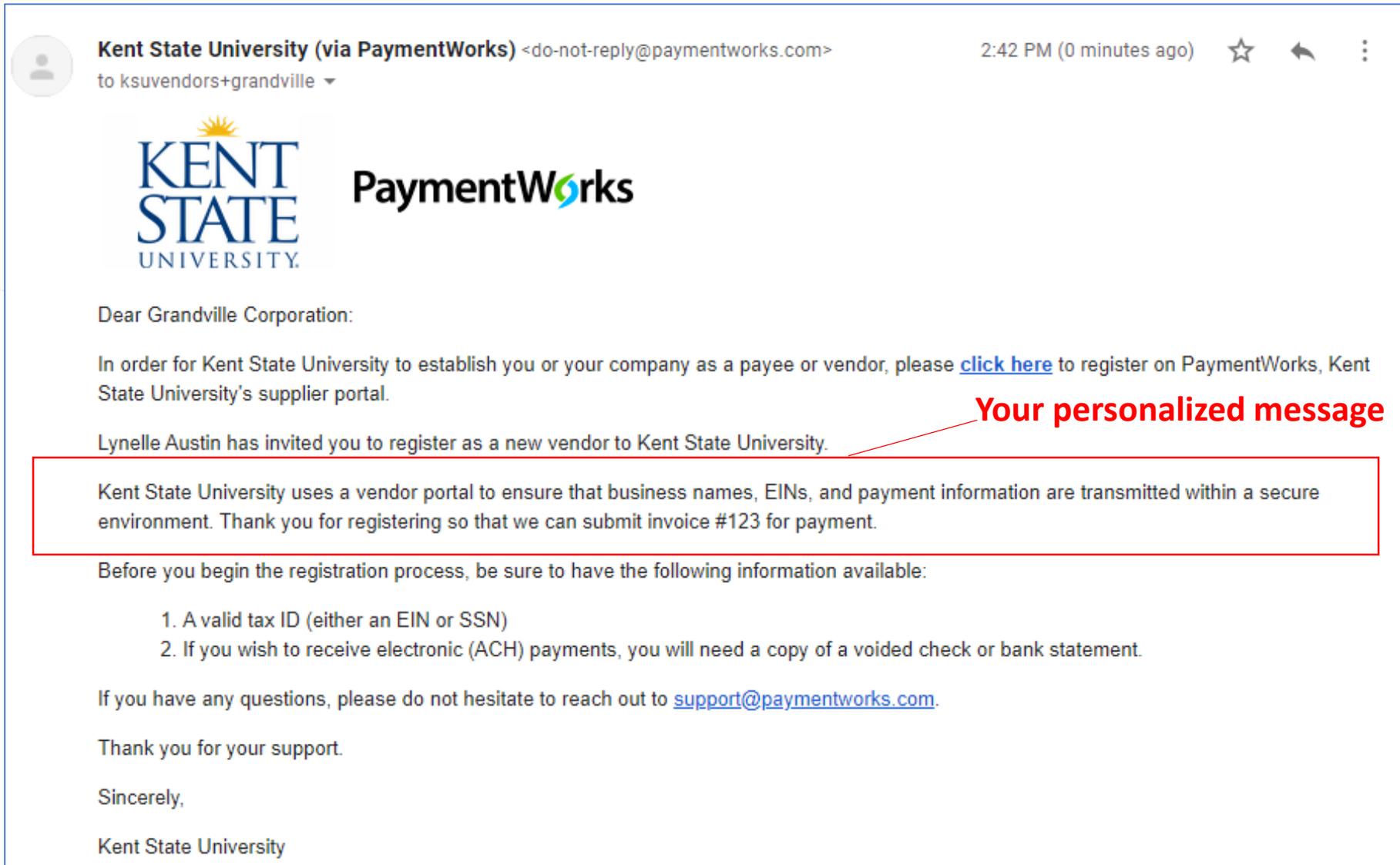
Has my vendor been invited to PaymentWorks?

1. Within PaymentWorks, go to **Vendor Master Updates**.
2. Click on the **New Vendors** tab.
3. Search for your vendor using the gray search section on the left.
4. Vendors that appear in the search results 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.
2. Complete the **Invite New Vendor** form.
 - Company/Individual Name – **vendor's** name
 - Contact E-mail – **vendor's** contact email address
 - Initiator Phone – **your** phone number
 - Reason for Inviting the Supplier – pick one
 - Independent Contractor - complete **only** for independent contractors
 - Description of Goods and Services – **brief** description
 - Personalized Message – **280-character max** (includes spaces)
3. Click **Send**.

What does the invitation email that the vendor receives look like?



The screenshot shows an email from Kent State University (via PaymentWorks) to ksuvendors+grandville. The email header includes the sender's name, email address, and the time received (2:42 PM). The body of the email features the Kent State University and PaymentWorks logos. The main text is a personalized message from Lynelle Austin, inviting the recipient to register as a new vendor. A red box highlights a specific sentence in the message, and a red arrow points to it with the text 'Your personalized message'. The email concludes with a list of required information for registration and contact details for support.

Kent State University (via PaymentWorks) <do-not-reply@paymentworks.com> 2:42 PM (0 minutes ago) ☆ ↶ ⋮
to ksuvendors+grandville ▾

Dear Grandville Corporation:

In order for Kent State University to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Kent State University's supplier portal.

Lynelle Austin has invited you to register as a new vendor to Kent State University.

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

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 any questions, please do not hesitate to reach out to support@paymentworks.com.

Thank you for your support.

Sincerely,

Kent State University

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

1. Search for your vendor using the gray search section on the left.
2. As your invitation and the vendor's registration are processed, the statuses listed in the **Invitation**, **Vendor Account**, and **New Vendor Registration** columns will change.
3. Once your vendor has completed the PaymentWorks onboarding process, their **vendor number** will appear in the New Vendor Registration column. You can then initiate a purchase or payment request for the vendor. **List the vendor number on your payment request.**

How do I view payments in PaymentWorks?

1. Navigate to the **Setup and Manage Portal** section and click on the **Invoices** tab.
2. Search for your vendor using the gray search section on the left.
3. Invoices that have been keyed will appear, along with a status:
 - Approved – Invoice has been keyed and will be processed on the date that is in the **Scheduled Pay Date** column.
 - Paid
 - Invoice has been paid as of the date listed in the **Actual Pay Date** column.
 - Click on Paid invoices to view check numbers (**Payment Document #.**)

How do I view a vendor's profile in PaymentWorks?

1. Navigate to **Vendor Master Updates** and then click on the **Vendor Profiles** tab.
2. Search for your vendor using the box in the upper right.
3. The vendor profile that appears will have two tabs:
 - Company Info – Name, address, tax classification, etc.
 - Paid – KSU-specific questions such as whether the vendor accepts credit cards and whether it charges a fee for credit card payments.

Thank You!

Contact us with your questions

- Emily Hermon – x28649, ehermon@kent.edu
- Barb Biltz – x28644, bbiltz@kent.edu



Thank You.

www.kent.edu