



# How to Onboard a Vendor in PaymentWorks



## First Steps

Before you send an invite, make sure you have the vendor's name, email address, and a short description of what they will be providing (good, service, or both)

You can log into PaymentWorks by clicking the Finance link in SNAP, as shown below

The screenshot displays the SNAP system interface. On the left is a vertical navigation menu with the following items: STUDENT, STARFISH, DEGREEWORKS, EPRINT, FACULTY/ADVISORS, FINANCE (highlighted in dark blue), HELP, HR, HR FORMS AND POLICIES, MY BENEFITS, RESOURCES, and SITE CONTENTS. To the right of the menu is a 'Banner General Menu' section containing a link for 'Banner PROD Application Navigator' and a 'Report Issues with Banner:' section with links for 'Finance Modules: Email banfinugg@sdbor.edu' and 'HR Modules: Email banhrugg@sdbor.edu'. Below this is a 'My Tools' section with a 'Purchasing Tools' subsection listing links for 'Purchasing Tools (SDezBuy)', 'Sourcing Tools (Sourcing Manager)', 'State Contracts', 'NASPO ValuePoint Agreements', 'Administrative Rules', and 'Purchasing Training Resources'. An 'Other Tools' subsection lists 'Reporting Tools' (with sub-links for 'Cognos 11 (new)' and 'Cognos 10 (old)'), 'Imaging Tools (Web Xtender)', 'Printing Tools (e-Print)', 'Vendor Tools (AP Shared Services)', and 'PaymentWorks', which is circled in black.

**STUDENT**  
STARFISH  
DEGREEWORKS  
EPRINT  
FACULTY/ADVISORS  
**FINANCE**  
HELP  
HR  
HR FORMS AND POLICIES  
MY BENEFITS  
RESOURCES  
SITE CONTENTS

**Banner General Menu**

- [Banner PROD Application Navigator](#)

**Report Issues with Banner:**

- Finance Modules: Email [banfinugg@sdbor.edu](mailto:banfinugg@sdbor.edu)
- HR Modules: Email [banhrugg@sdbor.edu](mailto:banhrugg@sdbor.edu)

**My Tools**

**Purchasing Tools**

- [Purchasing Tools \(SDezBuy\)](#)
- [Sourcing Tools \(Sourcing Manager\)](#)
- [State Contracts](#)
- [NASPO ValuePoint Agreements](#)
- [Administrative Rules](#)
- [Purchasing Training Resources](#)

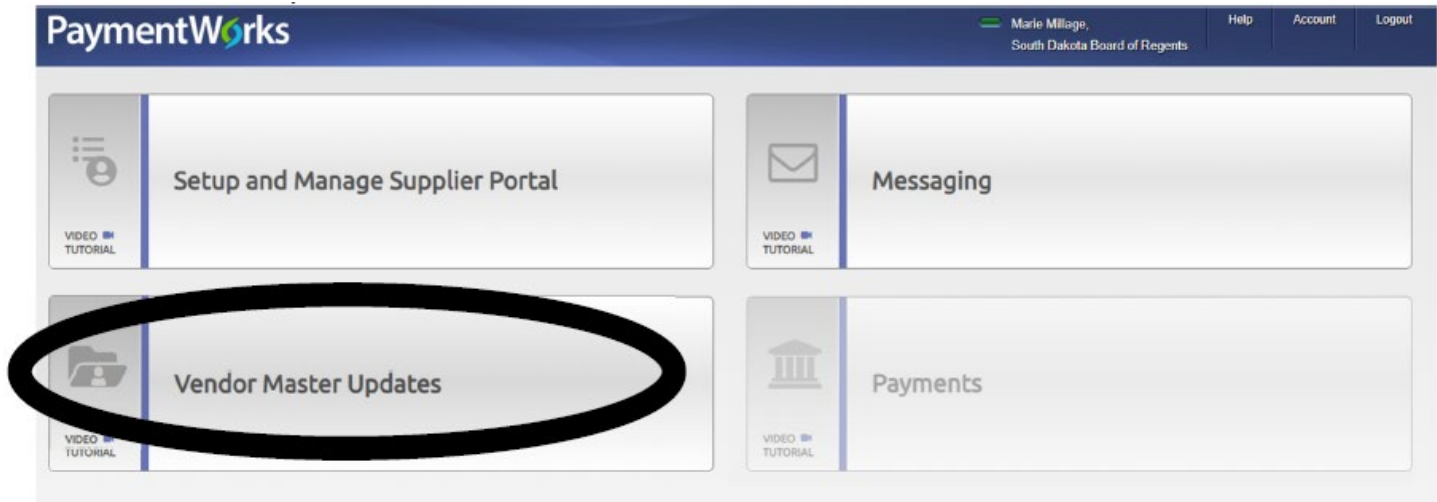
*Other Tools*

- Reporting Tools
  - [Cognos 11 \(new\)](#)
  - [Cognos 10 \(old\)](#)
- [Imaging Tools \(Web Xtender\)](#)
- [Printing Tools \(e-Print\)](#)
- [Vendor Tools \(AP Shared Services\)](#)
- [PaymentWorks](#)

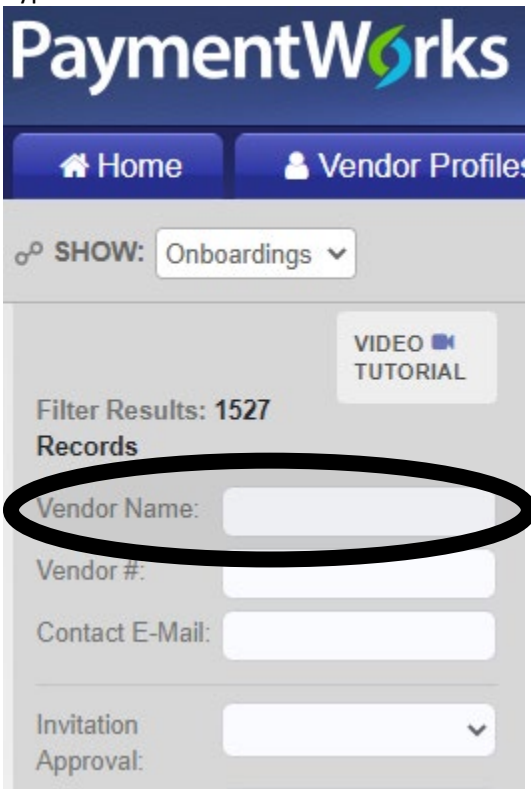
## Prior to sending an invite

Before sending an invite, check to ensure an invite has not yet been sent. When searching, type a few characters or a keyword of the known vendor name. Do not input too many words in the search bar.

Click "Vendor Master Updates"



Type in a few letters or one word into in the Vendor Name field.



Example: searching *holiday* shows two vendors

The screenshot shows the search results table for the search term 'holiday'. The table has columns for 'ONBOARD START', 'UPDATED ~', 'VENDOR NAME', 'INVITATION', 'VENDOR ACCOUNT', 'NEW VENDOR REGISTRATION', and '% COMPLETE'. The search filters on the left show 'Vendor Name: holiday'.

	ONBOARD START	UPDATED ~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Filter Results: 2 Records Vendor Name: holiday	01/11/2022	01/20/2022	Holiday Inn Express Sycamore	Clicked	Email Validated	Complete Vendor #: 101127175	<div style="width: 100%; height: 10px; background-color: blue;"></div>
Vendor #: <input type="text"/> Contact E-Mail: <input type="text"/>	10/22/2021	01/11/2022	Holiday Inn Cedar Falls	Clicked	Email Validated	Complete Vendor #: 101117062	<div style="width: 100%; height: 10px; background-color: blue;"></div>

Example: searching *north* shows eight different vendors

VIDEO TUTORIAL		ONBOARD START	UPDATED ~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Filter Results: 8 Records	Vendor Name: <input type="text" value="north"/>	11/10/2021	03/01/2022	Budget Blinds of North Sioux Falls	Clicked	Email Validated	Not Started	<div style="width: 20%;"></div>
Vendor #: <input type="text"/>	Contact E-Mail: <input type="text"/>	02/25/2022	02/28/2022	University of North Dakota/Bonnie Kee	Clicked	No Account	Not Started	<div style="width: 10%;"></div>
Invitation Approval: <input type="text"/>	Invitation Delivered: <input type="text"/>	12/03/2021	02/15/2022	VALO BioMedia North America LLC	Delivered	No Account	Not Started	<div style="width: 5%;"></div>
Account Created: <input type="text"/>	Registration Form: <input type="text"/>	12/03/2021	01/20/2022	FOSS North America Inc	Clicked	Email Validated	Complete Vendor #: A00016822	<div style="width: 100%;"></div>
Show Cancelled Only: <input type="checkbox"/>	Source: <input type="text"/>	05/11/2021	06/18/2021	University of North Texas	Clicked	Email Validated	Complete Vendor #: A00098902	<div style="width: 100%;"></div>
Invitation Initiator: <input type="text"/>	<input type="text"/>	03/05/2021	03/25/2021	Roger Ternes / NorthStar Athletic Association	Clicked	Email Validated	Complete Vendor #: A00162576	<div style="width: 100%;"></div>
<input type="button" value="Clear Filters"/>	<input type="button" value="Send Invitation..."/>	01/25/2021	02/01/2021	Northern Signs Research	Clicked	Email Validated	Complete Vendor #: 101096766	<div style="width: 100%;"></div>
<input type="button" value="Send Invitation..."/>		01/27/2021	01/27/2021	Northern State University	Disabled Reminders	No Account	Not Started	<div style="width: 0%;"></div>

If the vendor has already been invited and is connected in Banner, you will see their Banner ID in the “New Vendor Registration” column.

If you search and determine the vendor has not yet been invited to PaymentWorks, send an invitation to the vendor. See page 5 for instructions.

After you search and determine the vendor has been invited to PaymentWorks, but they have not completed their registration, see page 10 for further instructions.

## How to send an invite

After you search and determine the vendor has not yet been invited to PaymentWorks, send an invitation to the vendor.

Click Send Invitation on the lower left of the screen

SHOW: Onboardings ▾

VIDEO TUTORIAL

Filter Results: 2 Records

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Show Cancelled Only:

Source:

Invitation Initiator:

Clear Filters

CSV

ONBOARD START	UPDATED ▾	VENDOR NAME
01/11/2022	01/20/2022	Holiday Inn Express Sycamore
10/22/2021	01/11/2022	Holiday Inn Cedar Falls

**Send Invitation...**

Complete the following information



## Invite New Vendor

Company/Individual Name:\*

This field is required.

Contact E-Mail:\*

Verify Contact E-Mail:\*

Description of Goods and Services:\*

Initiator Department:\*

\*Required Field

Cancel

Send

Company/Individual name: type in the vendor's name as you know it

Contact E-Mail: correctly type the email address of where the invitation needs to go

Verify Contact E-Mail: re-type the email address

Description of Goods and Services: provide a short description of what is being provided. Examples: office supplies, membership dues, training, software, speaking engagement, referee, subscription, etc.

Initiator Department: SDSM&T Department initials-Your name Example: SDSM&T CEE-Marie

Initiator Phone Number: 605-394-xxxx

Example: 605-394-6343

Reason for inviting this supplier: choose the most appropriate option

Reason for inviting this supplier:\*

- Choose One -

- Choose One -

Product

Service

Product and Service

**Personalized Message:**

This message is limited to 280 characters. Identify yourself and provide personalized information in this message. By providing more details, it helps the vendor identify who this email is from and what it is for. This information will be supplied in the email invitation that is sent to the vendor from PaymentWorks.

**Example:**

SDSM&T is implementing a new payment process with PaymentWorks and we need you to register with them as a vendor when you receive the invite to do so. Thank you!

Click Send on the lower right. An example of the email the vendor will receive is on page 12 of this manual.

\*Required Field



After you send the invite, refresh the main list of invites sent on the “new vendors” tab to ensure your invite says “Delivered” under the “Invitation” column. You may need to refresh the page in order to see the status of the invitation. You can refresh by pressing the “F5” key on your keyboard or clicking the “PaymentWorks” logo, then Vendor Master Updates.

04/27/2021	05/22/2021	Clark Equipment Company	Delivered	No Account	Not Started	<div style="width: 100%;"><div style="width: 100%;"></div></div>
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If it says “Undeliverable” you need to resend the invite. To do this, click the blue link, “undeliverable” under the Invitation column.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/19/2021	04/19/2021	Subrift	<a href="#">Undeliverable</a>	No Account	Not Started	<div style="width: 100%;"><div style="width: 100%;"></div></div>

Click Resend Invitation

### Invitation Details:

Initiator: Terri Symens (Terri.Symens@sdstate.edu)      Vendor Name: Nebraska Turfgrass Association      Contact E-mail: wendy@nebraskaturfgrass.com      Initiated: 12/02/2021      Email Sent: 12/02/2021

Personalized Message: Please accept the PaymentWorks invite as a secure way to submit your w9 info. We currently have Inv B67CE4D9-0001 on our PO # P0362462. Thank you for your time. Terri

Custom Fields:  
Description of Goods and Services : Registration  
Initiator Phone Number : 605-688-6275  
Initiator Department : SDSU AP Terri (Inv B67CE4D9-0001 PO# P0362462) USD GI NN  
Reason for inviting this supplier : Product and Service

[Disable Reminders](#) [Resend Invitation](#)

When you click Resend Invitation, the original invitation will populate. Change the contact e-mail address to the correct address the invitation should go to. Make sure to verify the email address before clicking “Send” again. When completed, click Send.



### Resend New Vendor Invitation

Company/Individual Name:\*  
Nebraska Turfgrass Association

Contact E-Mail:\*  
wendy@nebraskaturfgrass.com

Verify Contact E-Mail:\*  
wendy@nebraskaturfgrass.com

Description of Goods and Services:\*  
Registration


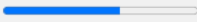
Initiator Department:\*

\*Required Field

[Cancel](#) [Send](#)



You can look on the New Vendors tab and see the progress of the registration. **If you do not receive an automated email with the vendor ID after a few days, or you see the below situations, both say “not started” under New Vendor Registration column, feel free to send a follow up email to the vendor.** You can ensure them that the registration is safe and secure. By registering with PaymentWorks, it helps strengthen controls surrounding payee onboarding for payees conducting business with South Dakota Mines. The vendor will also be able to see any payments the BOR has initiated. The check number will populate on the vendor’s invoice tab after payment is made.

02/23/2022	02/25/2022	David Harriman	Opened	No Account	Not Started	
02/14/2022	02/25/2022	Carmen Steen	Clicked	Email Validated	Not Started	

To quickly search for the vendors you have previously sent an invitation to, you can search on the left side of the website, on the new vendors tab/onboarding page on the Invitation Initiator. Type your first and last name in this section, and it will bring up all vendors you have ever sent an invitation to.

Home
Vendor Profiles
Updates
New Vendors

SHOW: Onboardings

**Filter Results: 1764 Records**

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Show Cancelled Only:

Source:

**Invitation Initiator:**



ONBOARD START	UPDATED	VENDOR NAME
03/18/2022	03/23/2022	Education Associates
03/11/2022	03/23/2022	Jisoo Park
03/22/2022	03/23/2022	Yi Chun
12/02/2021	03/23/2022	Nebraska Turfgrass Association
03/22/2022	03/23/2022	Andrew Rodriguez
12/03/2021	03/23/2022	VALO BioMedia North America LLC
03/21/2022	03/23/2022	USA Licensed Bows
03/02/2022	03/22/2022	Amanda Perrion
12/02/2021	03/22/2022	Recyclingbin.com
03/21/2022	03/22/2022	BRAD MEYER

You will receive an automated email after the vendor is connected in Banner and has a vendor ID attached. An example of this email can be found on the bottom of page 10 of this manual.

## The vendor has already been sent an invite

If an invite has been sent previously, work with the representative you've been communicating with and tell them their company has already been invited, but the registration has not been completed. They will need to log into PaymentWorks to update their information. If the vendor has questions regarding the PaymentWorks platform or specific aspects of the registration process, please direct them to <https://community.paymentworks.com/payees>

Click "Clicked" in the invitation column, so you can see which email address the original email was sent to.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
01/11/2022	01/20/2022	Holiday Inn Express Sycamore	Clicked	Email Validated	Complete Vendor #: 101127175	
10/22/2021	01/11/2022	Holiday Inn Cedar Falls	Clicked	Email Validated	Complete Vendor #: 101117062	

You will find the email address that the original invite was sent to under Contact E-mail

### Invitation Details:

close X

Initiator:  
Courtney Jeschke (Courtney.Jeschke@usd.edu)

Vendor Name:  
Holiday Inn Express  
Sycamore

Contact E-mail:  
hiexpress.sycamore@gmail.com

Created:  
01/11/2022

Email Sent:  
01/11/2022

#### Personalized Message:

USD Athletics would like to add you as a vendor in our payment system in order to process payment for USD Tennis Folio #129516. Thank you!

## Example of the email you will receive after the vendor ID has been created

Registration Completed for Springfield Public School

no-reply=paymentworks.com@m.paymentworks.com on behalf of PaymentWorks Support <no-reply@paymentworks.com>  
To Millage, Marie

You forwarded this message on 12/4/2020 2:42 PM.

Reply Reply All Forward

Fri 12/4/2020 1:40 PM

Springfield Public School has completed the registration process and now is set up in the ERP system.

The following vendor numbers have been assigned:  
101093342  
101093342

Vendor connected:  
Company Legal Name - Ind School District 85  
Company DBA - Springfield Public School  
Registration Submitted By - Amanda [REDACTED]

For more information about this or other invitations in PaymentWorks, please go to the "Onboardings" page in PaymentWorks.

Best regards,  
PaymentWorks Support

## **Sending an email prior to sending the invite – This step is optional**

I have provided a few different examples (*italicized*) of text you can modify to fit your situation. The bold text, at the bottom of this page, needs to stay the same if you are choosing to send an email prior to the invite.

Example 1:

*Good Morning Vendor,*

*Dr Johnson from the SD Mines Chemistry department forwarded me an invoice (#1234) from you. University of North Texas is not currently set up in our finance system at South Dakota Mines. I wanted to let you know you will be soon be receiving an email from PaymentWorks. If you need to forward the email to someone in finance/accounting, please do. By registering with PaymentWorks, you will be able to electronically complete a W-9 as well as sign up for direct deposit.*

Example 2:

*Good Afternoon Vendor,*

*Dan Anderson from the Facilities & Services team at South Dakota Mines sent me your information to have Earth Work Solutions set up as a vendor in the finance system at SD Mines. I'm assisting him with getting you set up as a new vendor, and I wanted to let you know you will soon be receiving an email from PaymentWorks. If you need to forward the email to someone in finance/accounting, please do. By registering with PaymentWorks, you will be able to electronically complete a W-9 as well as sign up for direct deposit.*

Example 3:

*Hello,*

*Per our conversation earlier, I will be sending you a PaymentWorks invite. The email will come from PaymentWorks. By registering with PaymentWorks you will be able to complete an electronic W9 as well as enroll in direct deposit. If the email from PaymentWorks needs to be forwarded to someone in accounting/finance, please forward the email on.*

Example 4:

*Good morning,*

*Council on Undergraduate Research is in the accounting system at South Dakota Mines, but the address on file does not match the address on invoice 39639-30221. I am requesting that you register with PaymentWorks and add the new remittance address into PaymentWorks. By registering with PaymentWorks you will be able to complete an electronic W9 as well as also enroll in direct deposit. I wanted to let you know, you will soon be receiving an email from PaymentWorks. If the email from PaymentWorks needs to be forwarded to someone in accounting/finance, please forward the email on.*

(Also include the below information with your personalized message)

**South Dakota Mines, a member of the SD Board of Regents, is pleased to announce we are partnering with PaymentWorks to both automate and strengthen controls surrounding payee onboarding for those payees conducting business with South Dakota Mines. You will soon be receiving an email invitation from South Dakota Mines which will give instructions how to securely register as a vendor in PaymentWorks. If you do not see the email invitation in your inbox, check your spam folder.**

**You will need the below information available to complete the registration process.**

- 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, deposit slip or bank statement**

**If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please visit <https://community.paymentworks.com/payees>**

**Thank you.**

**Example of the email the vendor will receive**

## South Dakota Board of Regents - New Vendor Registration



invitations=paymentworks.com@m.paymentworks.com on behalf of South Dakota Board of Regents (via PaymentWorks) <invitations@paymentworks.com>  
To: Peterson, Janet



PaymentWorks

Dear Janet Peterson:

Terri Symens has invited you to register as a new vendor to South Dakota Board of Regents.

Hi Janet. This is your invite to PaymentWorks we discussed on the phone recently. Thanks, Terri

In order for South Dakota Board of Regents to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, South Dakota Board of Regents'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 South Dakota Board of Regents directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please email [support@paymentworks.com](mailto:support@paymentworks.com).

Thank you for your support.

Sincerely,

South Dakota Board of Regents

The vendor's name will appear in the salutation. This is what you type into the invitation in "Company/Individual Name."

Your name will appear on the next line. This is generated from logging into PaymentWorks through SNAP.

The next line is the message you type in the "Personalized Message" box on the invitation.