# PaymentWorks Quick Reference Guide

Login using Single Sign On (SSO): www.paymentworks.com/login/saml/?idp=cornell

From the Home page, select Vendor Master Updates.
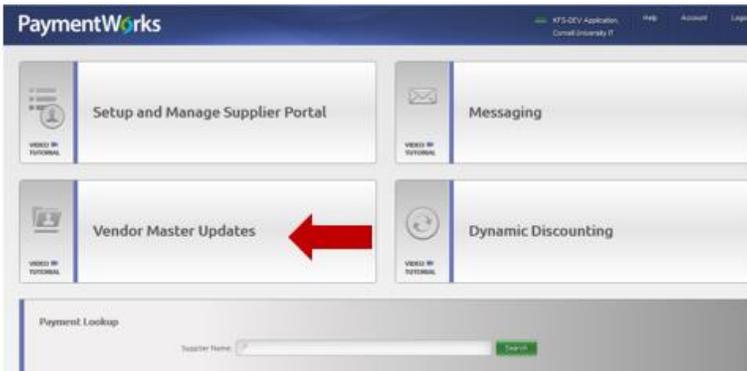
Send an email invitation from the Vendor Master Updates page.
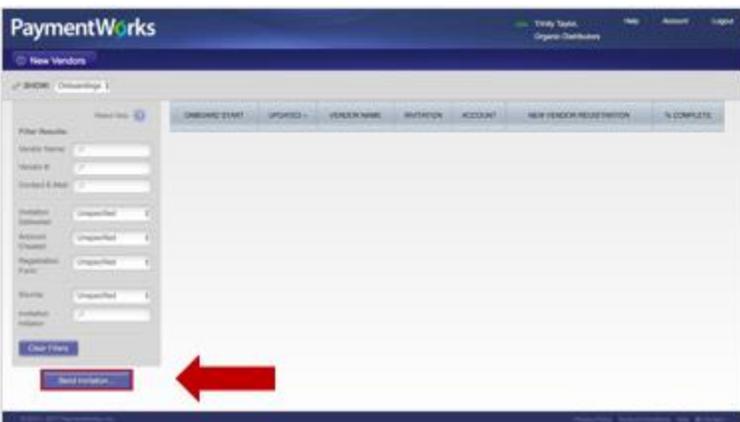
Complete the invitation.
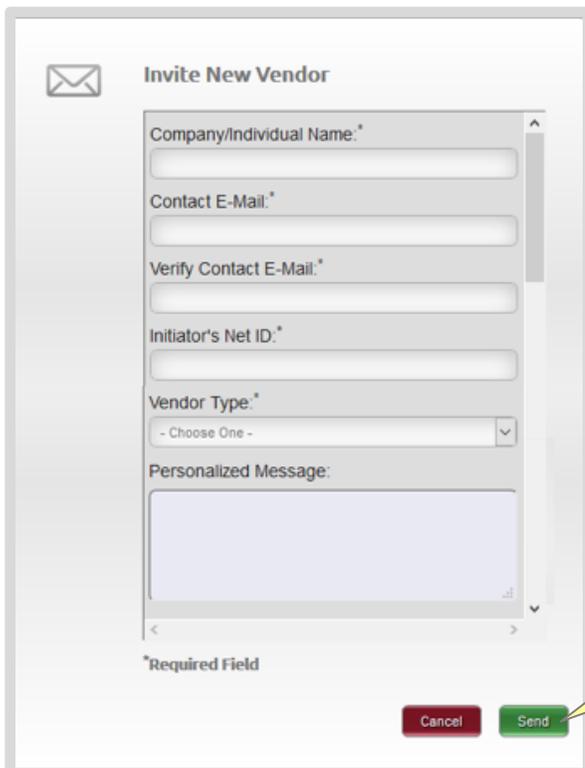
- Most vendor payment reasons in the drop down align with sections 201 & 203 of Procurement's Buying Manual.
- Service center staff members should only choose payment reason for DV vendor. They should NOT choose Purchase Order.
- Requests for Purchase Order vendors should be routed to Procurement Services via a requisition.
- Make sure you include your phone number in the Personalized Message.

1. Complete the invitation with the vendor's name, email and your NetID
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

Possible Statuses in the Invitation column

- **Sent**: This acknowledges that the invitation was sent. If the date is more than a few days old, you should check to see if the vendor received the email. The vendor might have to check its Spam or Junk folder.
- **Delivered**: The invitation was delivered to the vendor's email server. In this status, the recipient has not opened the email. If it remains in this status for long, the vendor might have to check its Spam or Junk folder.
- **Undeliverable**: The vendor's email server rejected the invitation. In this case, you should contact the vendor to verify the email address. If it is correct, tell the vendor to get its IT department to "white list" paymentworks.com (i.e., allow the PaymentWorks e-mail address to go through its server).
- **Opened**: The vendor has seen and opened the email, but has not yet clicked the link to begin the onboarding.
- **Clicked**: The vendor opened the email and followed the link to PaymentWorks. Please note that once a vendor clicks an invitation, you can no longer re-send the invitation.
- **Self-Registered**: The vendor went to the Payer's Public landing page - e.g. www.paymentworks.com/company - and joined PaymentWorks from there. You should never see this as Cornell hides this landing page.

Possible Statuses in the Vendor Account column

- **No Account**: The vendor has not started the registration process.
- **Email Validated**: The vendor has started the registration process by clicking the link to verify its email address.
- **Registered:** The vendor created an account but has not submitted its vendor registration form.

Possible Statuses in the New Vendor Registration column

Note: You will not be able to click on the links in this column as the pages that are linked contain sensitive data, e.g. SSNs. You will be able to see the status of your vendor and the KFS vendor number when the vendor has been fully processed.

- **Not Started**: The vendor received the email, but has not done anything with it.
- **In Progress**: The vendor has opened the registration form, but has not yet completed and submitted it.
- **Submitted**: The vendor has submitted the form but it hasn't been processed by Procurement. You would see these under New Vendor Requests as "Pending".
- **Processed**: The form has been processed and pulled down to KFS for review/approval.
- **Complete**: The form has been approved in KFS and pushed back up to PaymentWorks. This is the same as status as "Connected" under New Vendor Requests.
- **Returned**: Procurement has sent the registration form back to the vendor for clarification or to correct an invalid entry.
- **Rejected**: The vendor reviewer has rejected the submitted form. It is something you should rarely see. This is the same status as "Rejected" under New Vendor Requests.
- **Invitation/Reminders Cancelled**: Someone from the Payer has clicked the "Cancel Reminders" link for that vendor. This could be the vendor reviewer or the vendor initiator.