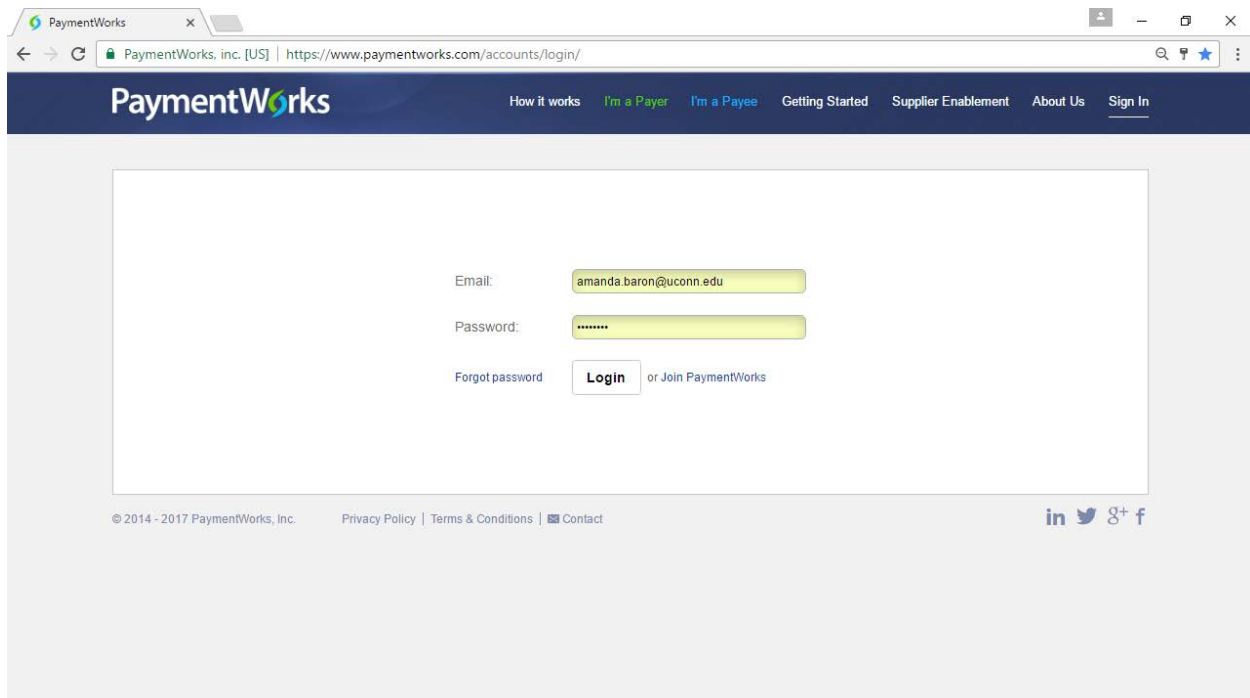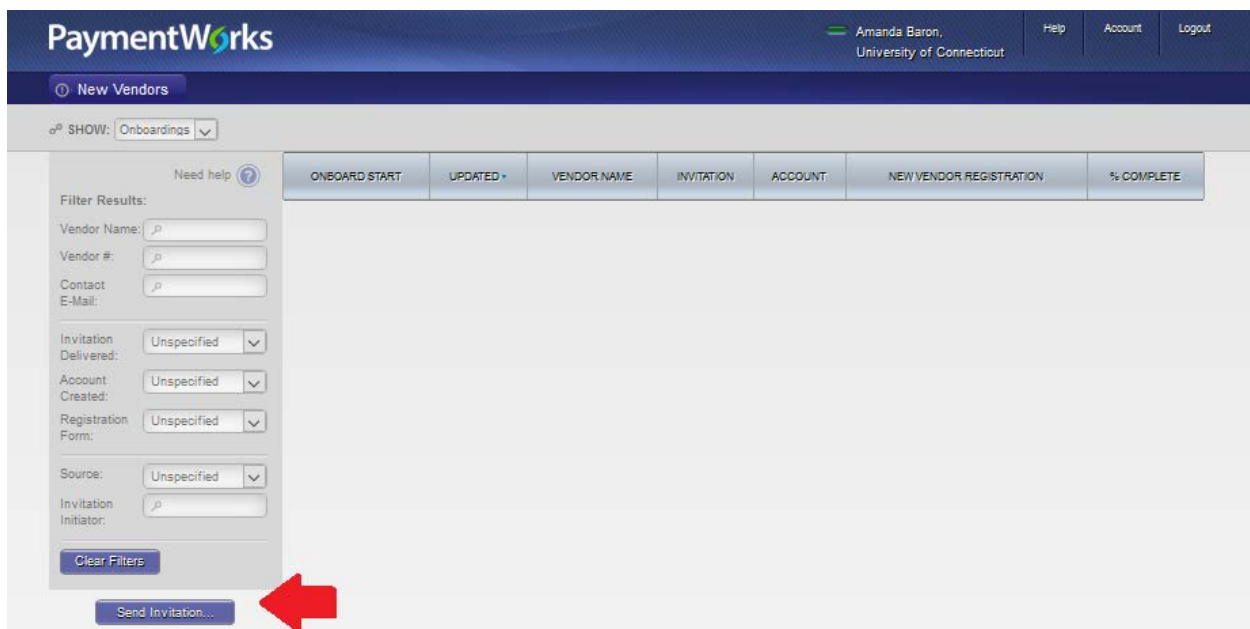# University of Connecticut

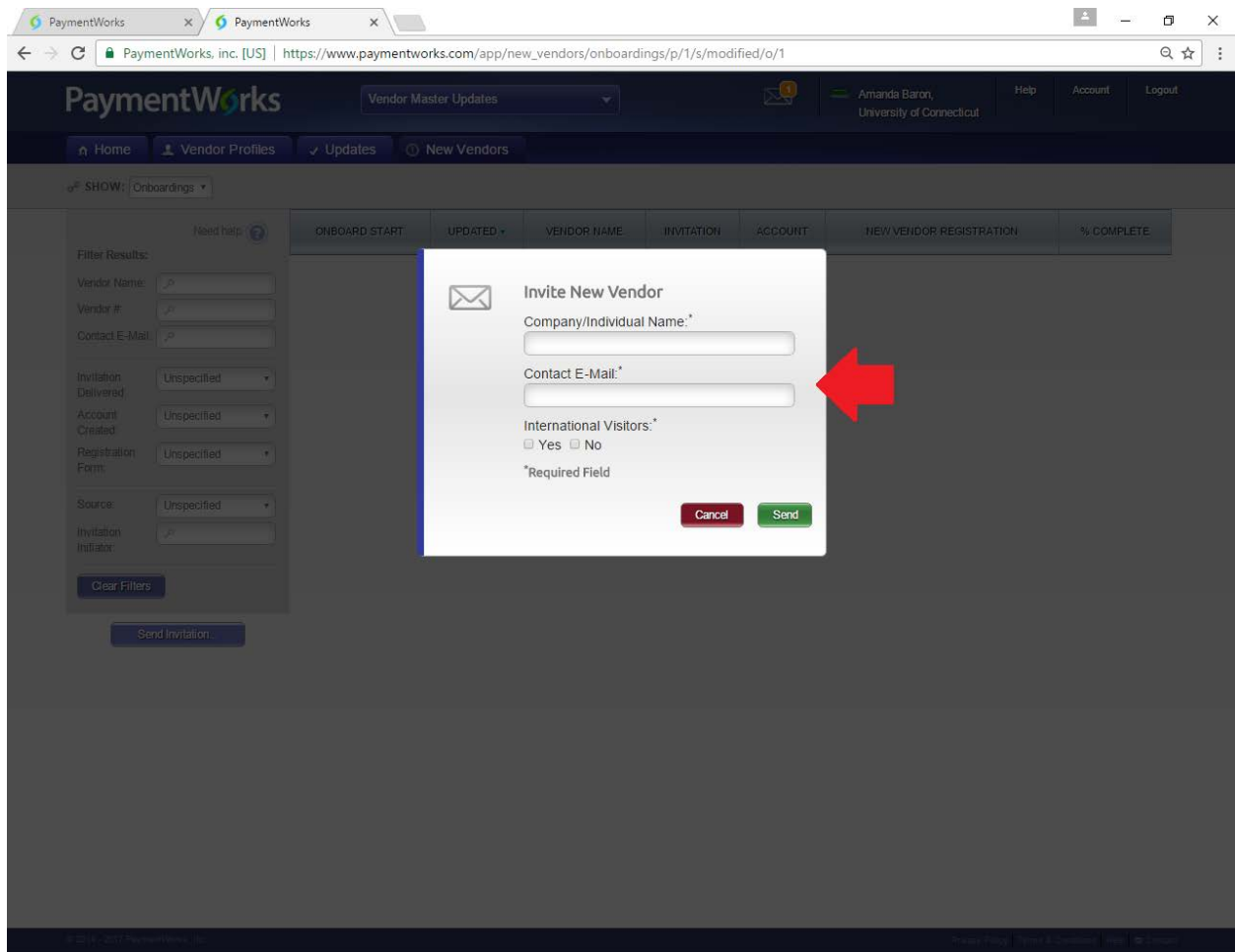PAYMENTWORKS INVITATION PROCESS

ACCOUNTS PAYABLE

February 23, 2017

1. Log into PaymentWorks www.paymentworks.com/uconn

2. Click Send Invitation

3. Type the vendor's name (company or individual) and their email address and click send.

Note: Click the "NO" box for International vendors

4. Your invitation has been sent. Click OK

5. You will see all invitations that you have sent and their associate status

6. You have the ability to filter by status.

Status Definitions

Invitation Column Status
- **Invitation Sent**: This just acknowledges that the invitation was sent. if the date is more than a day old, the email was probably not delivered. In these cases, you might need to check that the email address was correct.
- **Invitation 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 their Spam or Junk folder.
- **Invitation Not Deliverable**: The vendor's email server rejected the invitation. This status is actually quite rare. In this case, we might have to try a different email address, or get the vendor's IT department to "white list" paymentworks.com.
- **Invitation Opened by Recipient**: The vendor has seen and opened the email, but they have not yet clicked the link to begin the onboarding.
- **Invitation Link Clicked**: The vendor opened the email and followed the link to PaymentWorks. This status shouldn't appear for long, because the next step is simply to create a PaymentWorks account.
- **Self Registered**: The vendor went to the Payer's landing page - e.g. www.paymentworks.com/HUMC - and joined PaymentWorks from there.

Account Column Status
- **Vendor Account Created on PaymentWorks**: This also shouldn't last long, since after creating a PaymentWorks account, the vendor should get an email to confirm the account right away. If this status lasts for more than a day, it probably means that the confirmation email wasn't seen, or went to Spam or Junk.
- **Vendor Account Confirmed on PaymentWorks**: The vendor is signed up on PaymentWorks and has access to the new vendor registration form. Generally speaking, if a vendor has this status you just need to ask them to log back in to PaymentWorks to go through the form.

New Vendor Registration Column Status
- **New Vendor Registration Submitted**: The vendor has submitted the form but it hasn't been processed. You would see these under New Vendor Requests as "Pending".
- **New Vendor Registration Approved**: You have approved the form. This is redundant with Approvals shown under New Vendor Requests
- **New Vendor Registration Processed**: The form has been processed and sent to KFS. This is redundant with Approvals shown under New Vendor Requests
- **New Vendor Registration Complete**: The form has been received and the vendor connection made. This is the same as status = "Connected" under New Vendor Requests. If the vendor is still asking what to do, you might want to suggest they login to PaymentWorks and check their Invoices tab.
- **New Vendor Registration Rejected**: You have rejected the submitted form. This is redundant with Rejected shown under New Vendor Requests
- **Invitation/Reminders Cancelled**: Someone from the Payer has clicked the "Cancel Reminders" link for that vendor.

7. Above is a copy of the email that the vendor receives when you send the invitation.