Sending a PaymentWorks Invitation to a Supplier Job Aid
FSU Procurement Services

OVERVIEW

PaymentWorks is FSU's new online supplier management portal. Through PaymentWorks, departments must send invitations to suppliers to complete an online onboarding process and become FSU suppliers. Once suppliers complete the onboarding process and their registration is approved, they can manage profile information such as their addresses, email addresses, and banking details as well as view invoice and payment-related updates.

CONTENTS: (CTRL + CLICK TO FOLLOW LINKS)
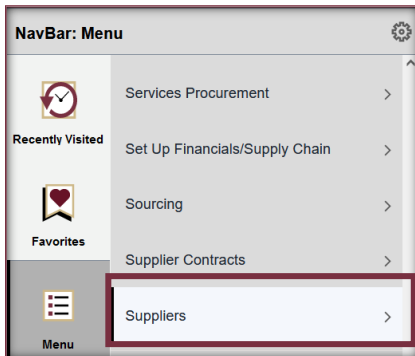
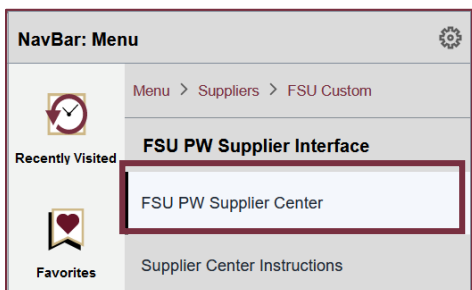## ACCESSING PAYMENTWORKS AND SENDING AN INVITATION

1. Log on to OMNI using SSO.

2. Go to OMNI Financials and access the FSU PW Supplier Center Dashboard.

- On the FI screen, click the Navbar icon at the top-right corner of the screen.

- Click the **Menu** option. Then scroll down and click the **Suppliers** link.

- Click the **FSU Custom** link, then click **FSU PW Supplier Interface** and **FSU PW Supplier Center**. This will open the FSU PW Supplier Center Dashboard.

Click here to learn how to add the Supplier Center Dashboard to your favorites.

- Use the **Supplier Search** to check and see if the supplier already exists in OMNI and whether they are connected to PaymentWorks already. You can search using the supplier's name, or Supplier ID number (if known). To complete the search, click the **Search** button.

  Note: You can only search by Supplier ID by entering the full ID number. If you only know part of the supplier's name, you can enter % before the first few letters of the supplier's name and it will bring up all the suppliers with those letters in their name in the search.

- The screen will display all matching or partially matching (if using % in the search) including their address, PaymentWorks status (Eligible, Not Eligible, or Onboarded), their status, classification, preferred payment method, their supplier status in OMNI and more.

Note: This dashboard will not show you if the supplier has been sent an invitation. Please refer to step 4 for more information on searching if you have sent the supplier a PaymentWorks invitation.

- If the supplier is already onboarded, check to see if the supplier's vendor classification (i.e. "Providing Goods and Services") and address match what is in their PaymentWorks profile. If the information doesn't

match, email the supplier and have them update their profile in PaymentWorks. The supplier will need to update their account and submit the change for their information to update properly in PaymentWorks.

- If the supplier is not onboarded, click the **Invite Supplier/Check Invite** on the bottom of the Supplier Center Dashboard homepage. This will take you to PaymentWorks.

If your supplier does not appear in the list, click here:

Invite Supplier/Check Invite

If you are looking to check on a supplier status, you can directly access PaymentWorks by clicking on the PaymentWorks tile on the OMNI Financials home screen.

Note: You will need to have the FSU_PAYMENTWORKS eORR role to access PaymentWorks. To get the role, you must attend the PaymentWorks training.

3. After leaving OMNI Financials, select the **Vendor Master Updates** tile from the PaymentWorks home page. The screen will open to the **New Vendor** tab and show the Onboarding Tracker screen.

4. Check that the supplier does not have a pending invitation to PaymentWorks by searching for the supplier by name, number, or contact email using the search filters on the left side of the tracker screen. The smart search option will pick up the typed information in the entire supplier name or contact email and display it on the Onboarding Tracker screen.

Once it is determined that the supplier requires an invitation, follow the instructions in the section below. New suppliers and suppliers requiring data changes will have to go through the onboarding process.

[Return to Index](#)

STEPS TO INVITE A SUPPLIER

5. Click the **Send Invitation** button under the Filters toolbar on the left-hand side of the screen.

6. Complete the fields in the invitation window.

- **Company/Individual Name:** Provide the name of the company or individual you will be doing business with.

- **Contact E-Mail:** Provide the email address of the contact person you are working with.

> **Note:** A supplier's email address **can only be used one time** for a PaymentWorks invitation. If the vendor is already in the PaymentWorks system, or if the email has become inactive, multiple emails cannot be sent to the same address.

- **Company/Individual Title:** Provide the title of the individual you are working with.

- **Company/Individual Phone Number**: Provide the contact phone number of the company or individual you are working with.

- **Initiator Name:** Provide your name as the department contact person requesting to add this supplier.

- **Initiator E-Mail**: Provide your email for correspondence as the department contact person requesting to add this supplier.

- **Reason for inviting this supplier:** Select one of the reasons from the dropdown to add this supplier to our system. To review the different reasons available and what they mean, click here.

> **Note:** If selecting the option **Providing Goods and/or Services, Peer Review** or **Research or Committee Member**, and the supplier is an **individual**, the Department is **required** to fill out and submit an **Independent Contractor Checklist (ICC)** form at the same time you submit the PaymentWorks invitation. The Independent Contractor Checklist (ICC) form can be found here.

- **Approximate Amount of Purchase for Providing Goods and/or Services:** Use this field to indicate the approximate amount of the purchase/payment to be made.

- **Personalized Message:** This is an extremely important field for communicating information to your supplier to assist in filling out their supplier registration form in the best way possible. Click here for a template and more information on the Personalized Message field.

7. Click the green **Send** button at the bottom of the invitation window.

> **Note:** If your vendor requires an Independent Contractor Checklist (ICC) form, remember to submit the form found here to the Controller's Office Tax and Compliance division.

Return to Index

INVITATION EMAIL

8. For each invitation you send, you will receive a status email from PaymentWorks regarding the invitation.
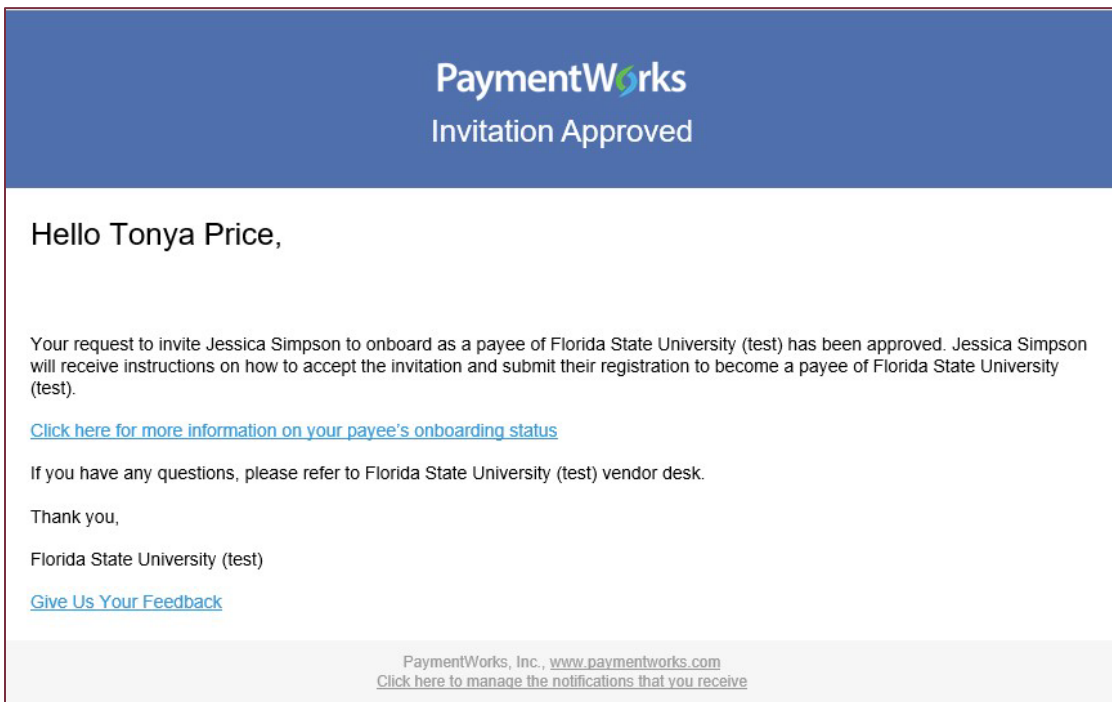
9. Your supplier will receive an email asking them to register with PaymentWorks. The Personalized Message you provide is in the second paragraph to the supplier.

Note: The content and structure of the invitation email cannot be changed. The only text that can be changed is the text from the Personalized Message field on the invitation.

Florida State University (test) - New Vendor Registration
1 message

Florida State University (test) (via PaymentWorks) <invitations@paymentworks.com>   Mon, Sep 18, 2023 at 9:22 AM
To: fsupw2019+scottsummers@gmail.com

PaymentWorks

Dear Scott Summers:

Tonya Price has invited you to register as a new vendor to Florida State University (test).

PLEASE ENTER: 1. Bottom of tax info tab description: "golf cart". 2. Additional Info tab select "goods/services" for the "Describe your potential relationship". 3. Select "Under 25000" for the approximate amount.

In order for Florida State University (test) to establish you or your company as a payee or vendor, please **click here** to register on PaymentWorks, Florida State University (test)'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 Florida State University (test) directly.

If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support here.

Thank you for your support.

Sincerely,

Florida State University (test)

---

10. You can view the status of a supplier request in the Onboarding Tracker.

Return to Index

STATUS MESSAGES

11. The following status messages may appear in the Onboarding Tracker:

- **Invitation Initiated:** The department has completed an invitation to be sent to the supplier.

- **Invitation Approved & Sent**: The supplier received the email but has not done anything with it.

- **Invitation Undeliverable**: The invitation was undeliverable to the supplier's contact email.

- **Invitation Email Opened**: The supplier received the email and has opened it but has not registered with PaymentWorks yet.

- **Email Verified – Invitation Received**: The supplier received the registration form email but has not registered with PaymentWorks yet.

- **Registration In Progress**: The supplier has signed into the registration form but has not yet completed and submitted it.

- **Registration Submitted – Pending Internal Review**: The supplier has submitted the form, but it hasn't been processed by Procurement.

- **Registration Approved**: The form has been processed and connected to the FSU OMNI System.

- **Onboarding Complete**: The form has been approved in OMNI and pushed back up to PaymentWorks.

- **Registration Returned**: Procurement has returned the registration form to the supplier for clarification or to correct an invalid entry.

- **Rejected**: The supplier reviewer has rejected the submitted form. It is something you should rarely see.

Return to Index

APPENDIXES

APPENDIX #1: REASONS FOR INVITING A SUPPLIER

The following drop-down options are available:

Reason for inviting this supplier:*
- Choose One -
- **Choose One -**
Providing Goods and/or Services
Research Participant
Honorarium Recipient
Peer Reviewer
Research Board or Committee Member
Clerkship Faculty or Clinical Rotation
Royalty Recipient
Non-FSU Student Payments

- **Providing Goods and/or Services**: Used when purchasing goods and/or services for university needs. This allows for a purchase order to be sent to the supplier.

- **Research Participant:** Used when an individual is participating in a research study.

- **Honorarium Participant**: Used as a gratuitous payment to an individual. Criteria must be met. For more information, click here.

- **Peer Reviewer**: Peer review is defined as an evaluation of scientific, academic, or professional work by others working in the same field. For more information, click here.

- **Research Board or Committee Member:** Research board or committee member payment is defined as a payment to an individual who is not a current or recent employee of the university for personal advisory services while acting in a board or committee member capacity. For more information, click here.

- **Clerkship Faculty or Clinical Rotation:** This represents doctors or medical practices that the College of Medicine uses to allow students to take part in a clinical rotation.

- **Royalty Recipient:** Used to reward contributions generating income for FSU.

- **Non-FSU Student Payments:** Used for fellowship or grant recipients. It is preferred that the school is set up to receive a PO to make a payment to their student.

APPENDIX #2: PERSONALIZED MESSAGE FIELD TEMPLATE

Copy and paste the following template into the Personalized Message field in the invitation and update it to your specifics.

PLEASE ENTER:

1. Bottom of tax info tab description: "abcdef".

2. Additional Info tab select "abcdef" for the "Describe your potential relationship".

3. Select "Under 25000" or "25000 and over" for the approximate amount.

Notes on template:

- For the description of goods or services on the bottom of the tax information tab enter: "abcdef": Enter the appropriate description of an item you are purchasing. If you are working with a supplier other than Goods and Services, your supplier can enter a more appropriate option: Honorarium, Peer Reviewer, etc.

- On the Additional Information tab select "abcdef" for the "Describe your potential relationship" field: You should have this match your **Reason for inviting this supplier**.

- Select "Under 25000" or "25000 and over" for the approximate amount: This field is only used for the Providing Goods and/or Services relationship. Choose an appropriate response to send to the supplier based on the dollar amount of the actual purchase you listed in the approximate amount on this form.

Below is a sample message:

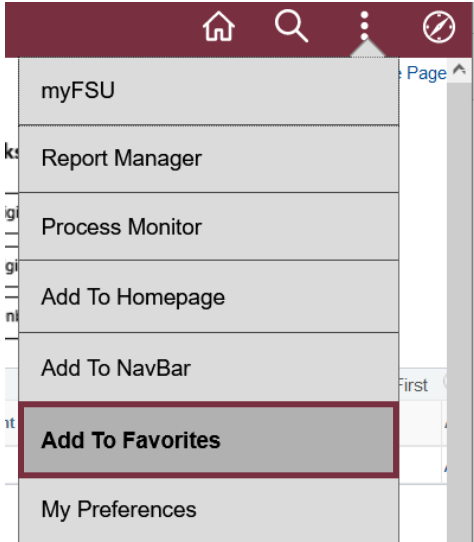| APPENDIX 3: ADD THE FSU PW SUPPLIER CENTER DASHBOARD TO FAVORITES |
|---|

To add the FSU PW Supplier Center Dashboard to your favorites in OMNI Financials:

- After accessing the dashboard, click the 3 dots at the top-right of the screen. Then, click **Add to Favorites**.
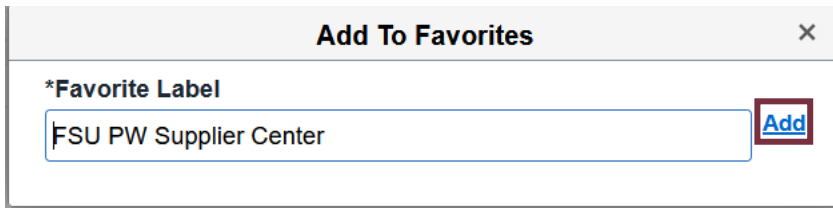
- Select **Add** on the Add to Favorites window.

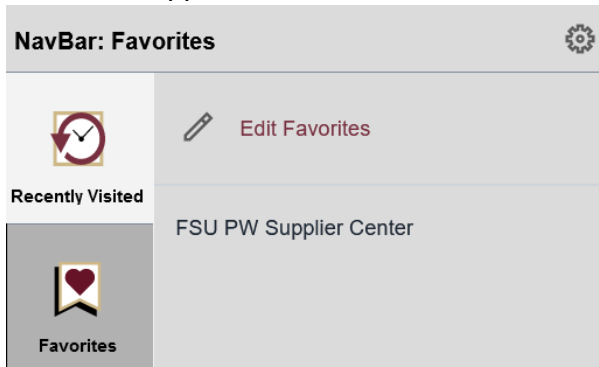
- A pop-up window will appear stating you have added the Supplier Center Dashboard to your favorites. Click **OK**.

- The FSU Supplier Center Dashboard will now appear in your Navigation Bar (NavBar) Favorites.

Return to Index

RESOURCES

For more resources from PaymentWorks, check out the links below:

- PaymentWorks Initiator Video
- PaymentWorks Onboarding Tracker Article

- [PaymentWorks Quick Reference Guide](#)
- [PaymentWorks Sending Invitation Video](#)
- [PaymentWorks Order Addresses Video](#)