# PaymentW<br/> orks

## PaymentWorks Supplier Reference

New Vendor Registration

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#### Registering with your customer on PaymentWorks

PaymentWorks is a cloud-based system that enables large and mid-sized organizations to securely exchange information with suppliers to ensure efficiency throughout the invoice to pay process.

Vendors use PaymentWorks to:

- Track and inquire about the status of submitted invoices
- Ensure your customers have all your current profile information
- Enable and manage electronic payments
- Request early pay discounts

Please note that not all customers use all functionalities in PaymentWorks. Some may display invoice information, whereas others may just require your supplier information.

#### **Registration Overview**

This manual will walk you through the registration process on PaymentWorks, which is a four-step process:

- 1. Invitation to Register
- 2. Creating a PaymentWorks Account
- 3. Completing the Registration Form
- 4. Submitting the Form and Approval

#### 1. Invitation to Register

Most vendors begin the registration process on PaymentWorks by responding to an invitation sent by their customer. If you are a new vendor and have not received an invitation from your customer, contact your customer representative and make sure they have your email address and were able to send the invitation.

Occasionally invitations are sent to Spam or Junk folders. If you have not received an expected invitation or other communication from PaymentWorks, look in these folders

or check with whoever administers the mail server for your organization to see whether the message(s) were caught at the server.

To start the registration process, click on the link at the bottom of the email. This e-mail will come from do-not-reply@paymentworks.com. Note that your customer's message may differ from the one shown below.

•	PaymentWorks (via PaymentWorks) <do-not-reply@paymentworks.( (="" ()="" (2="" )<="" 1="" 2="" 3:55="" ago)="" minutes="" pm="" th=""></do-not-reply@paymentworks.(>						
	PaymentW <sub>0</sub> rks						
	Dear Training Vendor:						
	As a new supplier with us it is important to understand our supplier requirements. We have undertaken a strategic initiative to improve the communications between us and our key suppliers, as well as provide visibility into the payment process. We have partnered with PaymentWorks, a free service for our suppliers, that will provide visibility into, and access to update critical information, which will in turn ensure an accurate and timely payment process from PaymentWorks. PaymentWorks provides an easy to access and easy to use Web-based portal linking you to your company's specific information as well as basic PaymentWorks supplier policies. There are minimal requirements to initiate this process and once completed this free service will allow you to:						
	<ul> <li>View the status of invoices you have submitted</li> <li>Access remittance details</li> <li>Maintain your supplier master information</li> <li>Send messages with questions about an invoice or a payment</li> <li>Review our policy information</li> <li>Avoid delays in payment due to incorrect check remit address or other critical data</li> </ul>						
	<ul> <li>Turn on ACH Payments by providing banking information in a secure environment that will allow PaymentWorks to make payments directly to your bank (no more waiting for mailed checks!).</li> </ul>						
	Do all of the above with any of your other customers that are using PaymentWorks.						
	** ACH is now the sole PaymentWorks method for supplier payments						
	Completing the PaymentWorks registration is a requirement for doing business with PaymentWorks.						
	Please click on this link: <a ?invite-token="https://paymentworks-2/?invite-token=" href="https://paymentworks.com/paymentworks-1/?invite-token=" htt<="" https:="" paymentworks-1="" paymentworks-2="" paymentworks.com="" td=""></a>						
	Thank you for your support.						
	Sincerely,						
	PaymentWorks						

**Key point:** It is very important to use the invitation link to begin your vendor registration to on PaymentWorks. Without clicking the invitation, you will make an account that is not associated with your customer, and they will not receive any information you update in your account.

If you are not the right person to complete the New Vendor Registration form, please

forward the email to the appropriate contact in your company.

#### 2. Creating a PaymentWorks Account

#### Registering

When you click the special link in the invitation, you will be directed to a page where you can create a basic PaymentWorks account. Creating the account is the first of four steps in the registration process.

Below is the page that appears upon clicking the link:

PaymentW <b>9</b> rks	но	W IT WORKS GET STARTED	ABOUT US	SIGN IN S	uppliers Join Here
	Payees (Suppliers) Join PaymentWorks for Free				
	Personal Information				
	First Name	Last Name			
	Company Name				
	Title				
	Email				
	Telephone				

**Key point:** If you are an individual, please put your own name in the Company Name field. For example, if you are an individual named Bob Smith getting paid by your customer, you would put "Bob Smith" in the Company Field name.

#### Verify your account

An email will be sent to the e-mail you used to create your PaymentWorks account. This e-mail, titled "PaymentWorks Account Registration" will come from support@paymentworks.com. Click Verify to activate your account.



**Key point:** Once you verify your email there is one more step in the registration process.

#### 3. Accessing the new vendor registration form

After verifying your account, you will be prompted to log into your account. Once you log in, you will see the new vendor registration form appear. Each companies' new vendor registration may look different, but an example is provided below:

PaymentWorks		
New Vendor Registration		
Please fill out and submit the following for be submitted to PaymentWorks and you Once you are approved as a new vendor status of all invoices you have submitted	vill be notified by email when your an of PaymentWorks, you will immediat	
All fields marked with a red asterisk	(*) are required fields. All other	r fields are optional.
Business, Trade or DBA Name:* (If you do not have a separate business, trade or DBA name, use your first & last name)	PaymentWorks	
Telephone:*	■ (201) 555-5555 ext 123	
Preferred e-Mail:*		

### 4. Form Submission and Approval

A confirmation page will appear once you have successfully completed the New Vendor Registration. The confirmation will appear as shown below.

Your new vendor registration has been submitted successfully to Organic Distributors	
You will receive an email notification when your application has been approved.	
<i>Please note, this is not an authorization to perform services.</i>	
Continue	
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You may receive a message that your tax ID is invalid. In this case, you should go back into your account and edit your company profile. Please refer to section on Company Profile of this document to see how to edit your Company Profile details.

When your customer approves your new vendor registration form, you will be notified via email.