

PaymentWorks

New vendor set-up and search for existing vendors

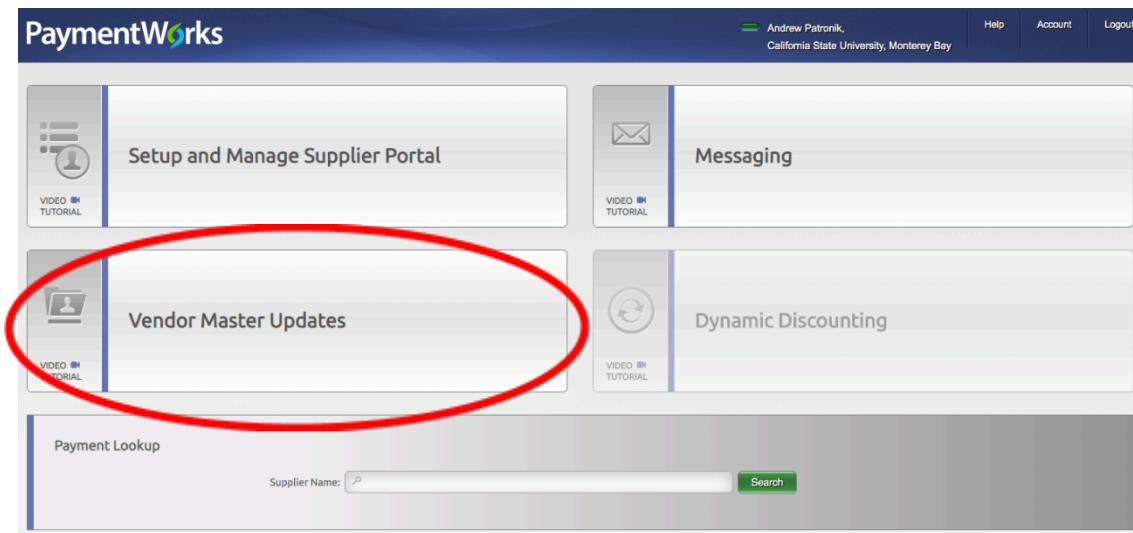
Effective October 31, 2019 CSUMB now uses PaymentWorks to establish vendors in its payment system, CFS. Vendors will now enter all their information online. This job aid will guide you in the process of establishing new vendors, as well as searching the system for existing vendors.

Step 1: Entering PaymentWorks

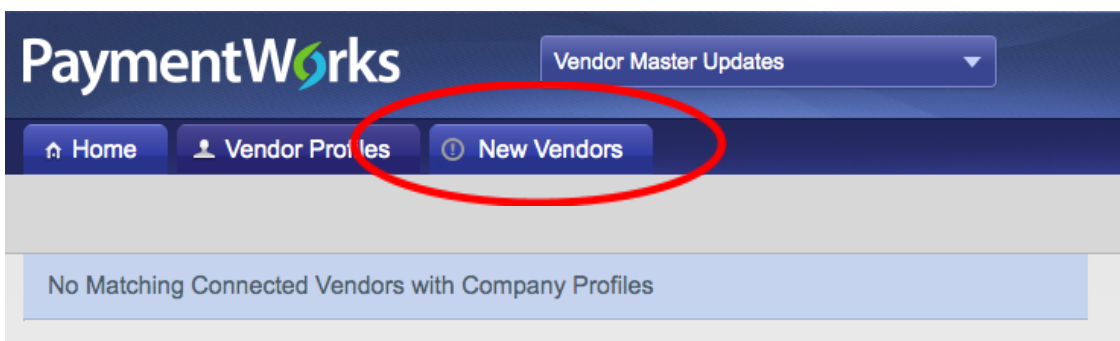
- Go to Procurement's CSUMB website: <https://csumb.edu/finance/procurement>
- Scroll down to "New Vendors" and click the link titled "PaymentWorks" (<https://paymentworks.com/login/saml/?idp=csumb>)
- Log in with your Otter SSO

Step 2: Sending the PaymentWorks "new vendor" link

- Click "Vendor Master Updates"



- Then select the tab "New Vendors"



- Click the “Send Invitation” button in the lower left

The screenshot displays the PaymentWorks interface for Vendor Master Updates. The top navigation bar includes 'Home', 'Vendor Profiles', and 'New Vendors'. Below this, there's a 'SHOW: Onboardings' dropdown. The main content area features a table with the following data:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION
10/31/2019	11/05/2019	Partners in Communication LLC	Clicked
11/04/2019	11/04/2019	Jose Alejandro Espinoza Solis	Clicked
11/04/2019	11/04/2019	Julian Colbeck	Clicked
11/04/2019	11/04/2019	Henrik Bridger	Delivered
11/01/2019	11/01/2019	Paymentworks	Clicked

On the left sidebar, there are several filter fields: Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. At the bottom of the sidebar, there are 'Clear Filters' and 'Send Invitation...' buttons. The 'Send Invitation...' button is circled in red.

- Enter the vendor’s name and email, as well as your phone number and a brief description of the product or service. Click the “Send” button to email the link directly to the vendor.

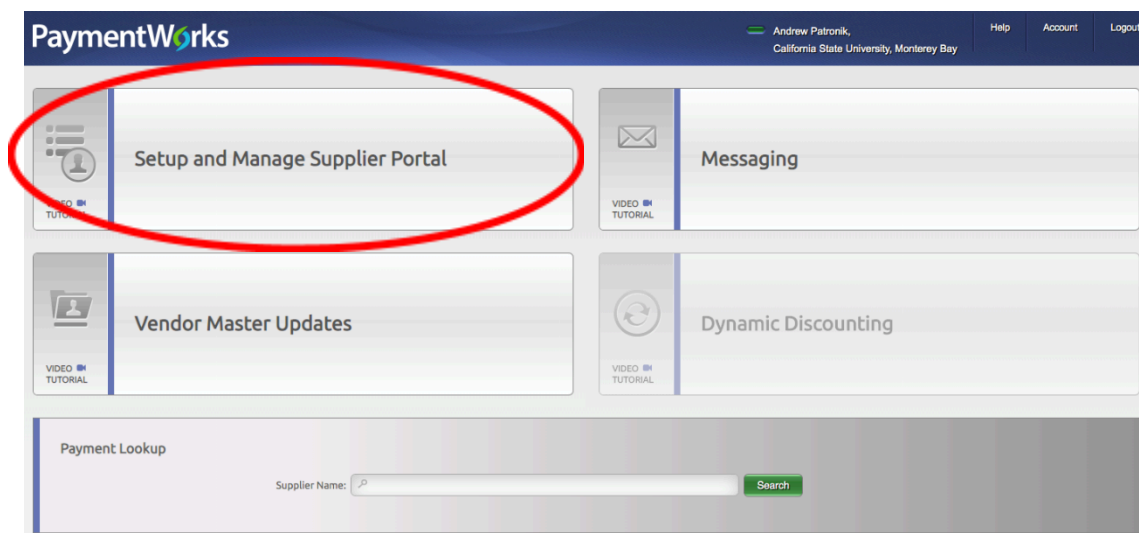
Step 3: Monitoring a new vendor’s set-up within PaymentWorks

- New, in-progress, vendors will appear in the “New Vendors” tab and display a % completed progress bar. Be sure to follow-up with vendors who fail to register within PaymentWorks, as it will delay payments.

Searching for Existing Vendors

Vendors already in PaymentWorks can be viewed to verify remit addresses and vendor ID numbers.

- From the Home screen click “Setup and Manage Supplier Portal



- Then go to the “Suppliers” tab to access the full list of vendors and search for specific ones.

