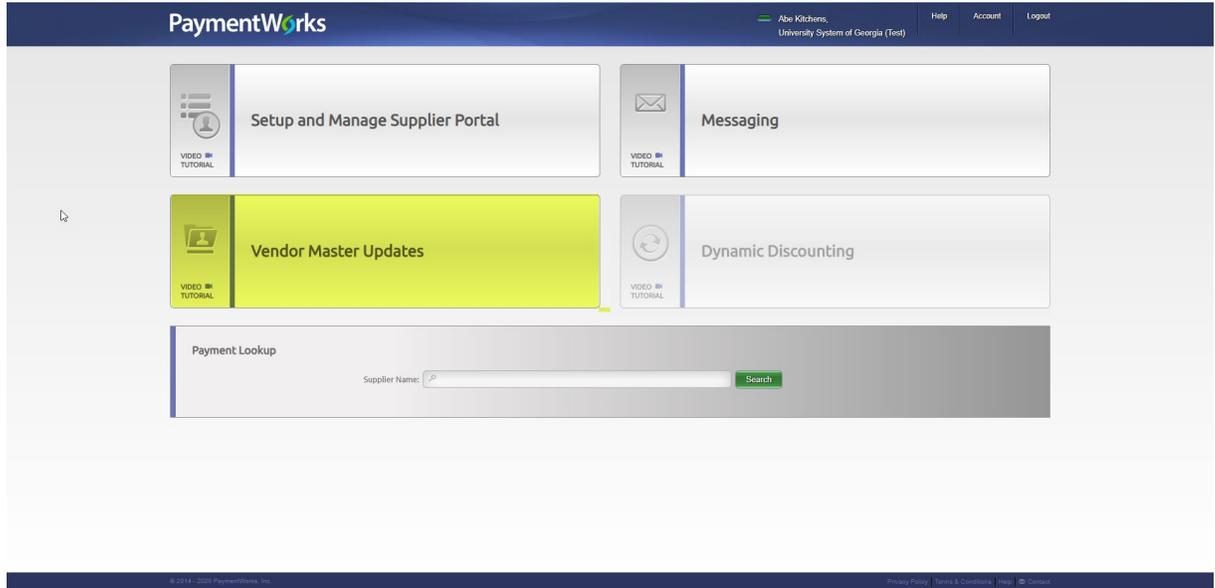
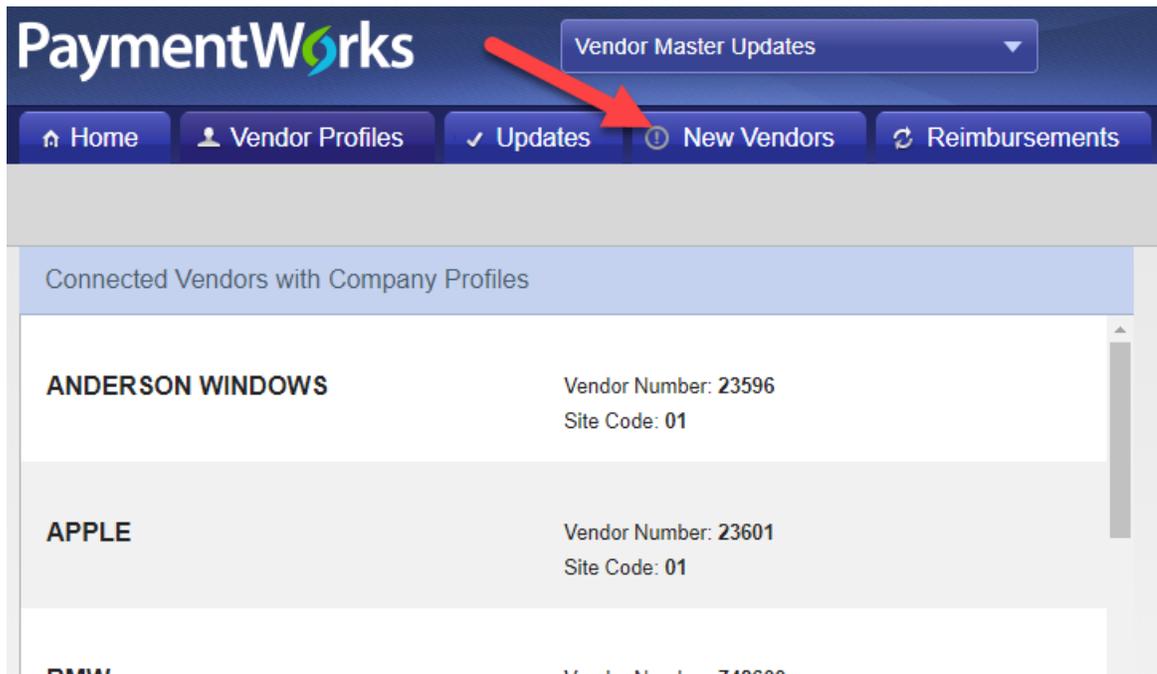


Sending an Invitation to a New Vendor

1. Log into Payment Works.
2. Select Vendor Master Updates.



3. Select the New Vendors tab.



4. Select Onboardings from the SHOW drop down menu.

The screenshot shows the PaymentWorks application interface. At the top, there is a navigation bar with the PaymentWorks logo and a 'Vendor Master Updates' dropdown menu. Below this is a secondary navigation bar with buttons for 'Home', 'Vendor Profiles', 'Updates', 'New Vendors', and 'Reimbursements'. The main content area features a 'SHOW' dropdown menu on the left, which is currently set to 'Requests'. A red box highlights this dropdown, and a mouse cursor is pointing at the 'Onboardings' option, which is highlighted in blue. To the right of the dropdown, there are sorting options: 'Sort By: Date of Submission' and 'Descending'. Below the dropdown is a 'Filter Results' section with various filters: 'Supplier Name' (text input), 'Submitted within: All Dates' (dropdown), 'Request Status: Show All' (dropdown), 'Request Type: Show All' (dropdown), 'Resubmitted Only:' (checkbox), 'My Pending Approvals Only:' (checkbox), and 'ID:' (text input). A 'Clear Filters' button and a 'csv' download icon are at the bottom of the filter section. The main content area displays a list of requests with columns for 'Type and Write', 'Request Status', and 'Request Type'. The requests listed are: 'Type and Write' (Apr 1, 2020 5:28 PM, Request Status: Approved, Request Type: Full), 'Zolu, Inc.' (Apr 1, 2020 4:38 PM, Request Status: Approved, Request Type: Full), 'IceCreamMagic' (Apr 1, 2020 4:43 PM, Request Status: Approved, Request Type: Full), and 'GeorgiaFans' (Apr 1, 2020 5:05 PM, Request Status: Approved, Request Type: Full).

5. Search by Contact E-mail address to verify the vendor does not already exist in PaymentWorks.

The screenshot shows the 'Filter Results' section of the PaymentWorks interface. The 'SHOW' dropdown menu is set to 'Onboardings'. There is a 'VIDEO TUTORIAL' button. The filter section includes: 'Vendor Name:' (text input), 'Vendor #:' (text input), 'Contact E-Mail:' (text input, highlighted with a red box), 'Invitation Approval:' (dropdown), 'Invitation Delivered:' (dropdown), 'Account Created:' (dropdown), 'Registration Form:' (dropdown), 'Source:' (dropdown), and 'Invitation Initiator:' (text input). A 'Clear Filters' button is at the bottom.

6. Select the Send Invitation button.

The screenshot shows the PaymentWorks interface for Vendor Master Updates. The table lists various vendors with their onboarding status. The 'Send Invitation...' button is highlighted in a red box, and a red arrow points to it from the left.

ONBOARD START	UPDATED -	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/03/2020	04/03/2020	Chick-Fil-A	Clicked	Email Validated	In Progress	<div style="width: 75%;"></div>
04/03/2020	04/03/2020	Invitation Mail Template Test2	Clicked	Email Validated	In Progress	<div style="width: 75%;"></div>
04/03/2020	04/03/2020	Invitation Mail Template Test4	Clicked	No Account	Not Started	<div style="width: 25%;"></div>
04/03/2020	04/03/2020	Invitation Mail Template Test3	Opened	No Account	Not Started	<div style="width: 25%;"></div>
04/03/2020	04/03/2020	Invitation Mail Template Test	Opened	No Account	Not Started	<div style="width: 25%;"></div>
04/02/2020	04/02/2020	Tree Service	Pending Approval	No Account	Not Started	<div style="width: 25%;"></div>
04/01/2020	04/01/2020	Type and Write 2	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>
03/30/2020	04/01/2020	Zolu, Inc.	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>
03/30/2020	04/01/2020	Katie Pierce	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>
03/30/2020	04/01/2020	GeorgiaFans	Clicked	Email Validated	Approved	<div style="width: 75%;"></div>
03/30/2020	04/01/2020	Type and Write	Clicked	Email Validated	Not Started	<div style="width: 25%;"></div>
03/30/2020	04/01/2020	JB test2	Opened	No Account	Not Started	<div style="width: 25%;"></div>

7. Complete the Vendor Invitation form as seen below.

The screenshot shows the 'Invite New Vendor' form. The 'Company/Individual Name' field is highlighted with a red error message: "This field is required." The form includes several other fields and dropdown menus.

Invite New Vendor

Company/Individual Name:*

This field is required.

Contact E-Mail:*

Verify Contact E-Mail:*

Description of Goods and Services:*

USG Institution:*

- Choose One -

Initiator Department:*

Initiator Phone Number:*

Reason for inviting this supplier:*

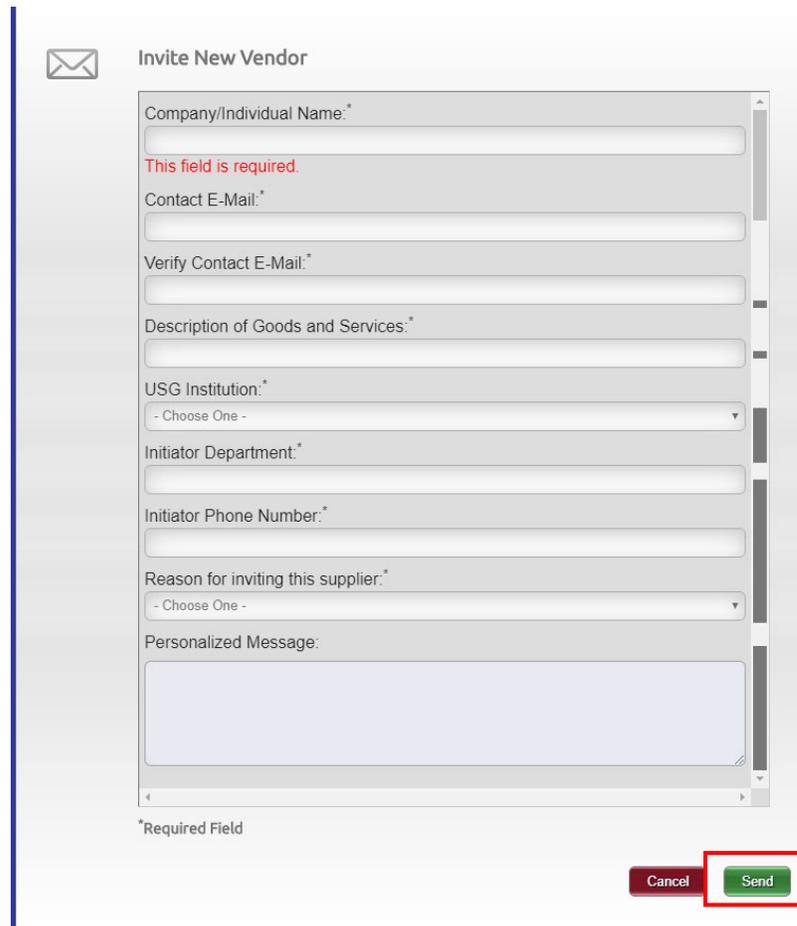
- Choose One -

Personalized Message:

*Required Field

Cancel Send

8. Click the Send button.



The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form contains several required fields, each marked with an asterisk: "Company/Individual Name:", "Contact E-Mail:", "Verify Contact E-Mail:", "Description of Goods and Services:", "USG Institution:" (a dropdown menu), "Initiator Department:", "Initiator Phone Number:", and "Reason for inviting this supplier:" (a dropdown menu). A "Personalized Message:" text area is located below the dropdowns. A red error message "This field is required." is visible next to the "Company/Individual Name:" field. At the bottom of the form, there are "Cancel" and "Send" buttons. The "Send" button is highlighted with a red rectangular box.

9. The invitation will be sent to the institution reviewer for approval before the invitation is sent to the vendor and the user receives a message similar to the one below.

