



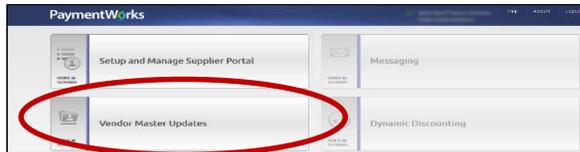
PaymentWorks Training: Checking Supplier Onboarding Status

From the “myRutgers” portal <https://my.rutgers.edu>:

1. Click on the “Rutgers Supplier Portal” app under Finance and Purchasing within My Apps

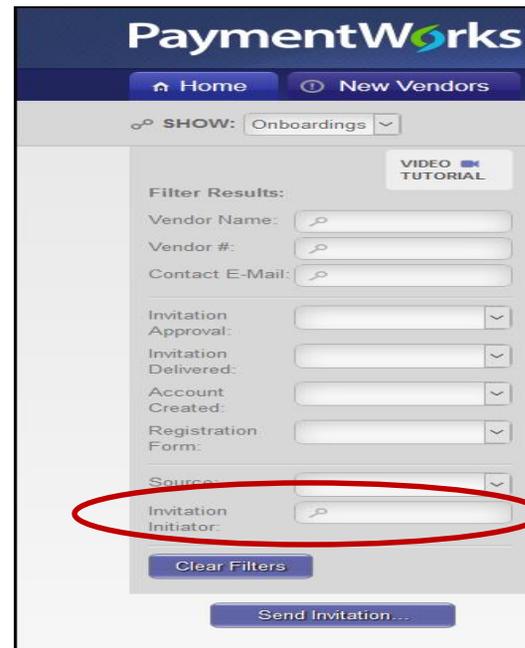


2. Click on the “Vendor Master Updates” tab from the PaymentWorks Home page



3. To see the status of all suppliers’ status, leave the “Invitation Initiator” field/ filter blank.

To see only the status of suppliers that only YOU have invited, enter your name in the “Invitation Initiator” field.





4. There are 3 columns with supplier statuses: **“Invitation”, “Vendor Account”, & “New Vendor Registration”**

| ONBOARD START | UPDATE | VENDOR NAME | INVITATION | VENDOR ACCOUNT | NEW VENDOR REGISTRATION |
|---------------|------------|---------------------------|------------|-----------------|---------------------------------|
| 08/05/2019 | 08/19/2019 | Red Mug | Clicked | Email Validated | Complete Vendor #: u13527929 |
| 08/17/2019 | 08/19/2019 | DH1 | Clicked | Email Validated | In Progress |
| 08/17/2019 | 08/19/2019 | RY1 | Clicked | Email Validated | Submitted |
| 08/15/2019 | 08/19/2019 | AirIT | Opened | No Account | Not Started |
| 08/15/2019 | 08/19/2019 | RD | Opened | No Account | Not Started |
| 08/15/2019 | 08/19/2019 | Specter | Opened | No Account | Not Started |
| 08/15/2019 | 08/19/2019 | KC | Opened | No Account | Not Started |
| 08/17/2019 | 08/19/2019 | MedD | Opened | No Account | Not Started |
| 08/19/2019 | 08/19/2019 | ISBER | Clicked | Registered | Not Started |
| 08/19/2019 | 08/19/2019 | Positive Expectations LLC | Clicked | Registered | Not Started |

Invitation Status:

| VENDOR NAME | INVITATION | VENDOR ACCOUNT | NEW VENDOR REGISTRATION | % COMPLETE |
|--------------------------|------------|-----------------|--------------------------------|----------------------------------|
| Supplier_for_Demo_1011lc | Clicked | Email Validated | Not Started | <div style="width: 33%;"></div> |
| Supplier_for_Demo_1021lc | Clicked | Email Validated | Complete Vendor #: 78948887 | <div style="width: 100%;"></div> |

5. To obtain detail for a specific vendor, click on the **status links** (in blue) to get more details about the invitation

| | | | | | |
|------------|------------|-------|---------|------------|-------------|
| 08/19/2019 | 08/19/2019 | ISBER | Clicked | Registered | Not Started |
|------------|------------|-------|---------|------------|-------------|

6. Once a particular supplier is chosen/ clicked on, detailed information appears

Invitation Details:

| | | | | |
|--|-----------------------|---|--------------------------|---------------------------|
| Initiator: Shirley Hom (sh1245@finance.rutgers.edu) | Vendor Name: ISBER | Contact E-mail: RUPSPWTEST+ISBER@gmail.com | Initiated: 08/19/2019 | Email Sent: 08/19/2019 |
|--|-----------------------|---|--------------------------|---------------------------|

Custom Fields:

Supplier type : Check Request Payee

Initiator Phone Number : 8009879087

What goods/service does the supplier provide? : services

Approval History:

Aug 19, 2019 11:39 AM: Approved by Shirley Hom <sh1245@finance.rutgers.edu> (Invitation Approver)
Message: None

| Possible Statuses in Invitation Column | |
|--|--|
| 1 | Pending Approval - Invite pending Procurement review & approval |
| 2 | Invitation Rejected - Procurement has rejected invite |
| 3 | Sent - Procurement has approved & Email has been sent |
| 4 | **Undeliverable - Email could not be delivered to supplier's server-Initiator will need to correct email |
| 5 | Delivered - Email has reached supplier's inbox |
| 6 | Opened - Email has been opened |
| 7 | Clicked - Special invitation link clicked |
| 8 | Cancelled - Invitation was altered and resent with new Vendor Name & Email |

| Possible Statuses in Vendor Account Column | |
|--|---|
| 1 | No Account |
| 2 | Registered - Created account & waiting to validate email |
| 3 | Email Validated - Supplier validated email and can begin registration |

| Possible Statuses in New Vendor Registration Column | |
|---|--|
| 1 | Not Started - Supplier has not begun Registration Form |
| 2 | In Progress - Supplier has started the registration form, but not completed |
| 3 | Submitted - Supplier has completed registration form |
| 4 | Returned - Procurement returned to Supplier to correct information |
| 5 | Approved - Procurement has Approved supplier's registration form |
| 6 | Rejected (rare) - Procurement has rejected for a variety of reasons; Contact Procurement |
| 7 | Processed - System integration in process |
| 8 | Complete (w/Vendor #) - Supplier has been integrated and fully onboarded |



If the supplier has a status of **“Undeliverable”**, it is likely that there was an issue/ typo in the email address.

| ONBOARD START | UPDATED | VENDOR NAME | INVITATION | VENDOR ACCOUNT | NEW VENDOR REGISTRATION |
|---------------|------------|--------------------|---------------|----------------|-------------------------|
| 08/21/2019 | 08/21/2019 | Ocean City Jet ski | Undeliverable | 1 account | Not Started |



Steps to take:

1. **Click** on the status to expand details
2. **Click** resend invitation
3. Edit information; update email
4. Resend invitation by clicking on the **Send** button

- Your role as initiator is to request a supplier invite, which will begin the onboarding process.
- Once University Procurement Services approves the request, the supplier is responsible for completing and submitting the registration and required forms.
- Procurement Services cannot onboard a supplier unless the supplier completes and submits their information correctly.

