Simplify New Supplier Onboarding
Accounts Payable

- Manual Tasks:
  - TIN Check
  - Sanction Check
  - Create ERP Vendor Master Record
  - Data & Forms in Document Store

- Inbound Calls
- Share Updates

Supplier

- Update Information?
- Need Payment Status?

Information:
- New Vendor Form
- W8/W9
- Bank validation

Fax | Paper | Email

Departments
Time Intensive

Inaccurate Data

Unsecure Info Exchange
FINDING A BETTER WAY
Supplier Departments

Have Updates?
Need Payment Status?

Accounts Payable
PaymentWorks

Invitation
Notifications

ERP

Automated Tasks:
- TIN Check
- Sanction Check
- Create ERP Vendor Master Record
- Data & Forms Archived in PW

New Vendor Registration

Have Updates? Need Payment Status?

Supplier
Increased Productivity

Accurate Data

Secure Information
Initiator Roles

- Invite Suppliers
- Track On-Boarding
Invite New Vendor

Company/Individual Name:

Contact E-Mail:

Required Field

Send

Cancel
Invite New Vendor

Company/Individual Name:*
Taylor's Laundry Service

Contact E-Mail:*
taylor.nemeth+laundry@SHSU.com

*Required Field
<table>
<thead>
<tr>
<th>ONBOARD START</th>
<th>UPDATED</th>
<th>VENDOR NAME</th>
<th>INVITATION</th>
<th>ACCOUNT</th>
<th>NEW VENDOR REGISTRATION</th>
<th>% COMPLETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/05/2017</td>
<td>06/05/2017</td>
<td>Taylor's Laundry Service</td>
<td>Sent</td>
<td>No Account</td>
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## Invitation Details:

<table>
<thead>
<tr>
<th>Initiator:</th>
<th>Vendor Name:</th>
<th>Contact E-mail:</th>
<th>First Sent:</th>
<th>Last Sent:</th>
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<tbody>
<tr>
<td>Taylor Nemeth (<a href="mailto:taylor.nemeth+shsuintitiator@paymentworks.com">taylor.nemeth+shsuintitiator@paymentworks.com</a>)</td>
<td>Taylor’s Laundry Service</td>
<td><a href="mailto:taylor.nemeth+LaundrySHSU@paymentworks.com">taylor.nemeth+LaundrySHSU@paymentworks.com</a></td>
<td>06/05/2017</td>
<td>06/05/2017</td>
</tr>
</tbody>
</table>

**Close**
Dear Taylor’s Laundry Service:

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 Sam Houston State University.

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 Sam Houston State University supplier policies. There are minimal requirements to initiate this process and once completed this free service will allow you to:

- View the status of invoices you have submitted
- Access remittance details
- Maintain your supplier master information
- Send messages with questions about an invoice or a payment
- Review our policy information

Please take a moment to register with PaymentWorks by following the link provided in the email.
Sam Houston State University

Before registering as a new Sam Houston State University supplier, you first need to create a free PaymentWorks account.

JOIN NOW

Already registered on PaymentWorks? Click here to login
Payees (Suppliers)

Join PaymentWorks for Free

Personal Information

First Name
Last Name
Company Name
Title
Email
Telephone

Create Password

Password
Confirm Password

I agree to the terms of service

JOIN NOW
PaymentWorks Account Registration

PaymentWorks Support <support@paymentworks.com>

to me

11:28 AM (1 minute ago)

Thanks for registering!

One more step to start using PaymentWorks. Verify your email within the next 24 hours to activate your account.

Verify Email

If this was sent to you in error, please ignore this email and your address will be removed from our records.
New Vendor Registration Form

Please fill out and submit the following form. The information you provide will be submitted to Sam Houston State University and you will be notified by email when your application is processed. Once you are approved as a new vendor of Sam Houston State University, you will immediately be able to see the status of all invoices you have submitted to Sam Houston State University.

All fields marked with a red asterisk (*) are required fields. All other fields are optional.

Business, Trade or DBA Name:* Sam Houston State University
(If you do not have a separate business, trade or DBA name, use your first & last name)

Telephone:* (201) 555-5555 ext 123

Preferred e-Mail:* 

Website URL (where applicable): 

Description of Goods/Services Being Provided: 

Business Details

For tax purposes are you an individual, sole proprietor or single-member LLC? Yes No

Business Legal Name: _____________________________
For tax purposes

Country of Incorporation or Organization:* United States of America

EIN: _____________________________
9-digit number, no spaces or dashes

Confirm EIN: _____________________________
9-digit number, no spaces or dashes

Tax Classification:* __________
This can be found under section 3 of your W-9

Signed & Dated W-9:* [Choose File] no file selected
An image or PDF file can be used here.
A blank form can be found at this link: W-9

D&B D-U-N-S Number (if applicable): _____________________________
Business Details

For tax purposes are you an individual, sole proprietor or single-member LLC?  
Yes  No

Business Legal Name:  
For tax purposes

Country of Incorporation or Organization:  
Canada

Tax Number:  
9-digit number, no spaces or dashes

Confirm Tax Number:  
9-digit number, no spaces or dashes

Signed & Dated W-8:  
Choose File  no file selected

An image or PDF file can be used here. A blank form can be found at this link:  
W-8BEN-E

D&B D-U-N-S Number (if applicable):

Type of Purchase:  
Materials
Business Details

For tax purposes are you an individual, sole proprietor or single-member LLC?  
Yes ☐  No ☐

Your Legal Name:  
First name  
Last name  

Country of Citizenship:*  
Canada

Tax ID Type:*  
Foreign Tax ID

Tax Number:  
9-digit number, no spaces or dashes

Confirm Tax Number:  
9-digit number, no spaces or dashes

Tax Classification:*  
Individual/sole proprietor or single-member LLC
This can be found under section 3 of your W-9

Signed & Dated W-8:  
Choose File  no file selected
An image or PDF file can be used here. A blank form can be found at this link:  
W-8BEN

D&B D-U-N-S Number (if applicable):
Your new vendor registration has been submitted

You will receive an email notification when your application has been approved.

Please note, this is not an authorization to perform services.

Continue
Tracking
<table>
<thead>
<tr>
<th>Onboard Start</th>
<th>Updated</th>
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<th>Invitation</th>
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