

PaymentWorks State of Idaho

VENDOR REGISTRATION AND UPDATE PROCESS

Helpful Hints & Things to know

- PaymentWorks invites cannot be forwarded.
- We recommend you use a generic email to setup your account.
- PaymentWorks is an online vendor registration system. We do not participate in the invoicing section of the program.
- You must click the SUBMIT button at the bottom of the online form.
- Once submitted, someone from PaymentWorks may call to verify the LAST FOUR digits of your bank account number. If left a message, please call them back as this is the last step of the process.

New Vendor Registration Process

- Vendor will receive system generated email from PaymentWorks.
- Vendor will click on the **Click Here** link to register.

State of Idaho [redacted] - New Vendor Registration Inbox x



State of Idaho [redacted] (via PaymentWorks) <invitations@paymentworks.com>

to [redacted]



PaymentWorks

Dear Tasty Treats:

Initiator has invited you to register as a new vendor to State of Idaho [redacted].

In order for State of Idaho [redacted] to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, State of Idaho [redacted]'s supplier portal.

Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (either an EIN or SSN)
2. If you wish to receive electronic (ACH) payments, you will need a copy of a voided check or bank statement.

If you have questions regarding billing, invoices, or payments, please contact State of Idaho [redacted] directly.

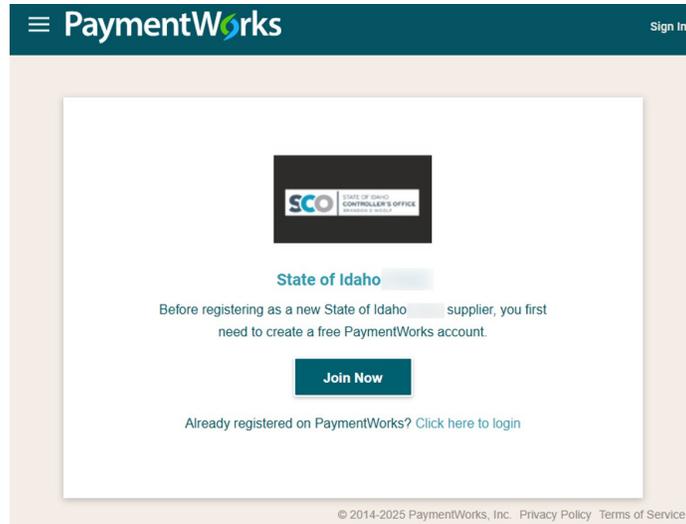
If you have questions regarding the PaymentWorks platform or specific aspects of the registration process, please review the help documentation or contact Support [here](#).

Thank you for your support.

Sincerely,

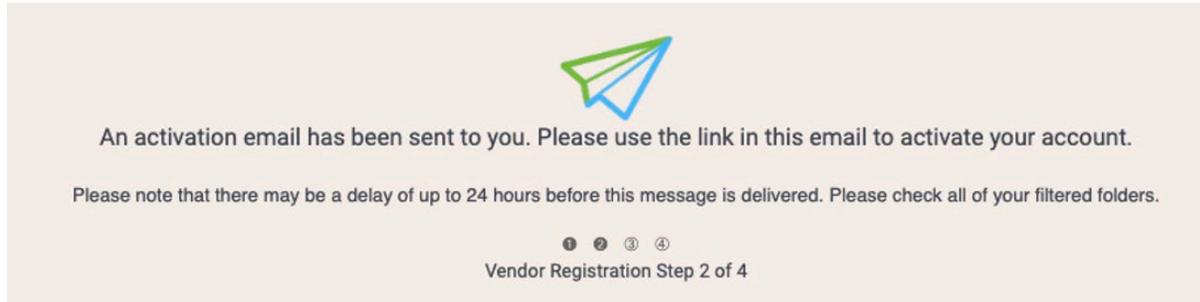
State of Idaho [redacted]

- Click here link takes the vendor to the PaymentWorks log in page.
- Vendor clicks the **Join Now** button.

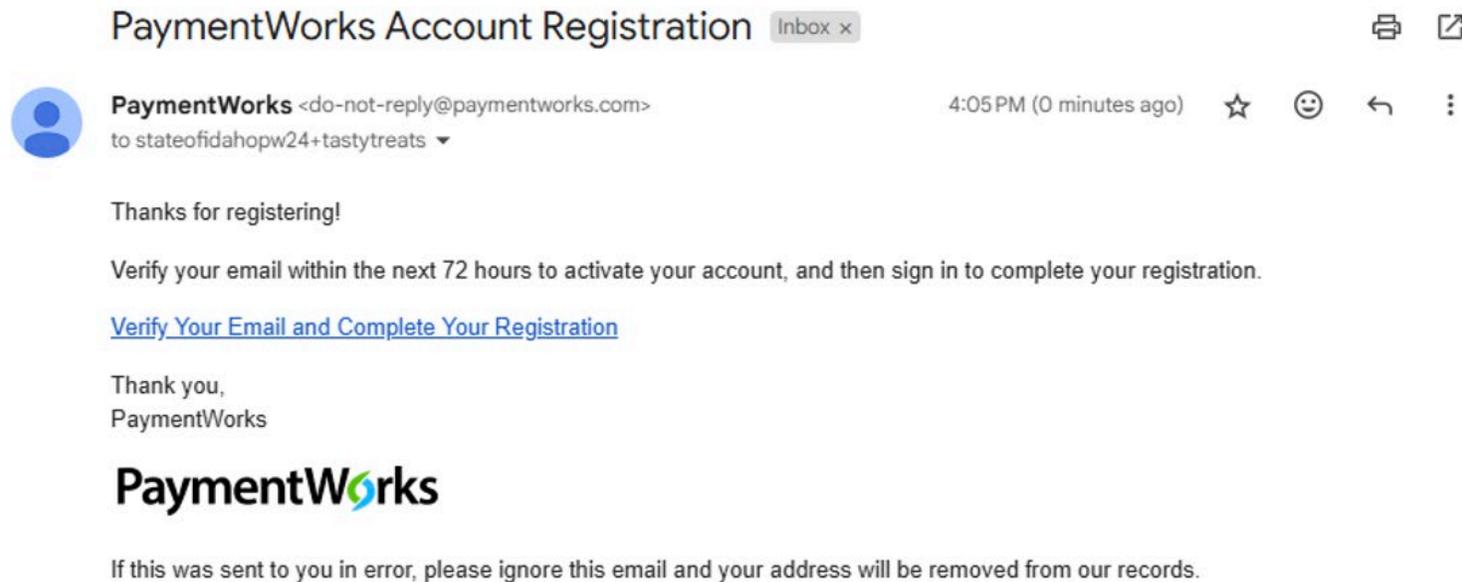


- Vendor completes account set up information, checks terms of service, and clicks **Join Now**.

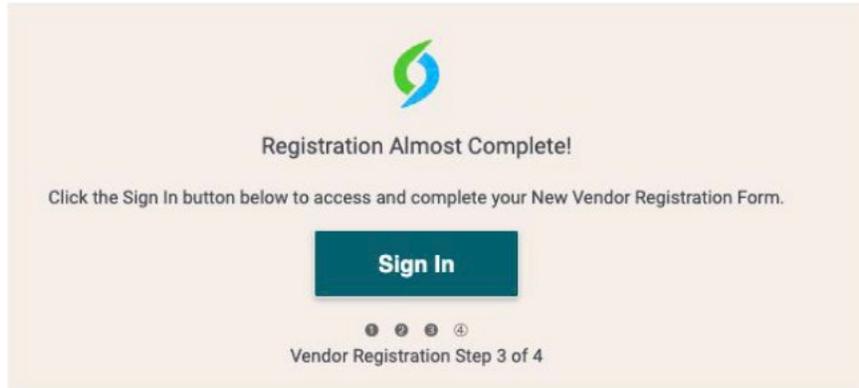
- Once you've created your account an activation email will be sent to activate your account and verify your email address.



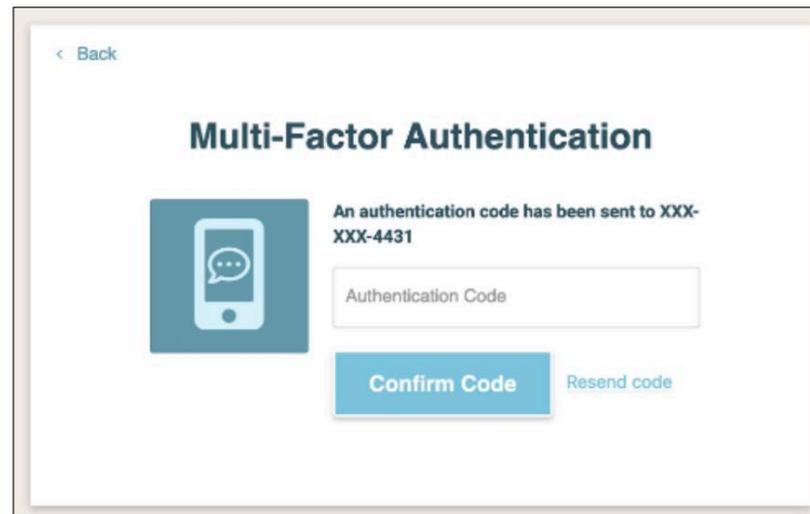
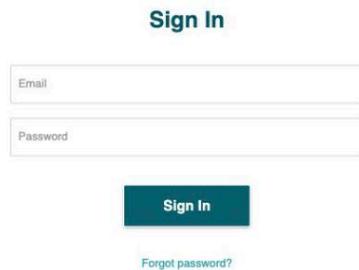
- Click on the **Verify Your Email and Complete Your Registration** link in the activation email.



- Click the **Sign In** button to complete the New Vendor Registration Form.



- Sign in using the log in credentials created previously and complete Multi-Factor Authentication.



- Upon signing in, vendors are directed to the State of Idaho registration form. Click the **Next** button to complete the form.



State of Idaho

New Vendor Registration

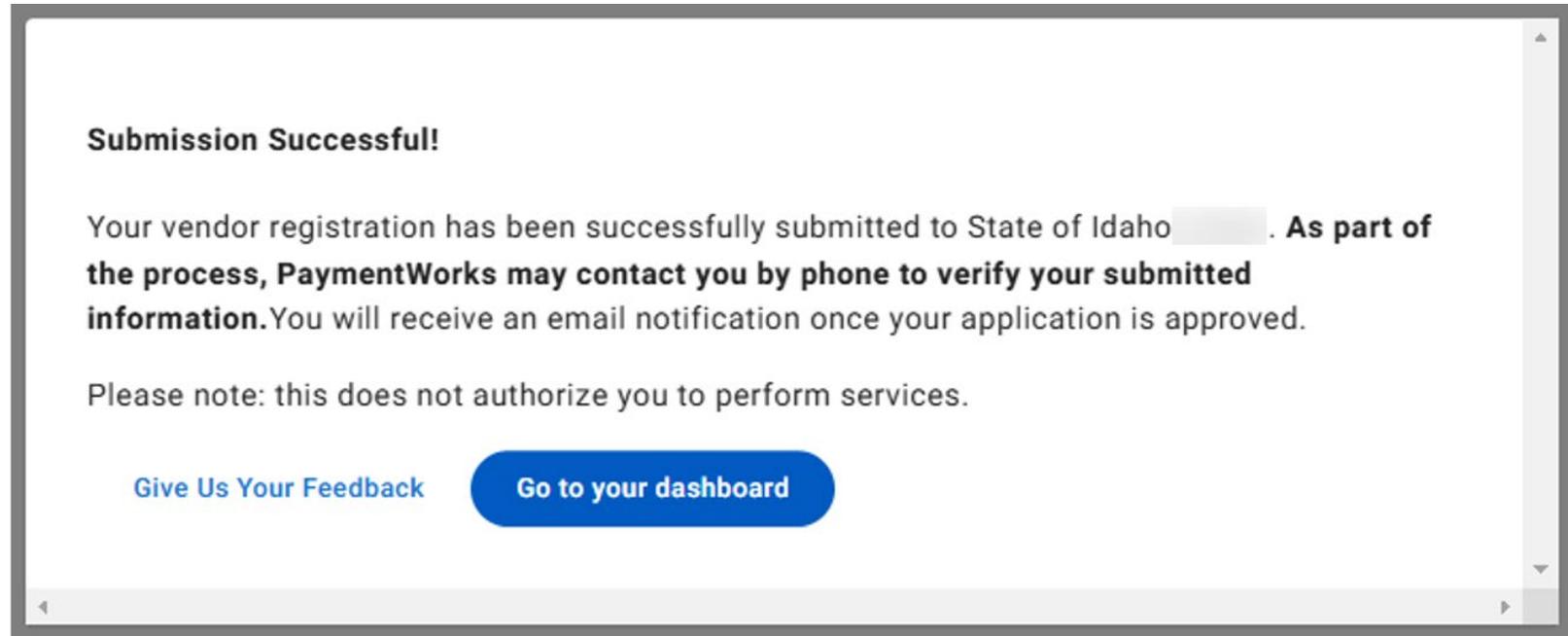
Welcome, Mister Candy!

In order to onboard as a new vendor, you will have to fill out and submit the following form to **State of Idaho**

You will be notified by email when your application is processed.

- Vendor fills out the registration form. Vendor selects the **Next** button to move to the next page or the **Save and Exit** button to save for later. After the form is completed, the vendor clicks the **Submit** button at the bottom of the final page to send the registration to the State of Idaho.

The screenshot shows the PaymentWorks registration interface. At the top left is the "PaymentWorks" logo. To its right is a "Logout" link. Below the logo is a navigation bar with five items: "Welcome", "Tax Information" (highlighted with a blue background), "Addresses", "Payment Information", and "Additional Information". The main content area is titled "Tax Information" and includes a note: "All fields marked with a red asterisk (*) are required fields. All other fields are optional." The primary question is "For tax purposes, which best describes you?*" with two radio button options: "Individual or Sole Proprietorship" (selected) and "Corporation or other complex business entity". Below this is a "Country of Citizenship*" dropdown menu with "United States" selected. A second question, "Are you using an SSN or FIN?*", is partially visible. On the right side of the form, there are two buttons: "Save and Exit" and "Submit". At the bottom of the page, there is a status message "Draft saved 8/21/2024, 10:57:57 AM" and two buttons: "Save and Exit" and "Next".



- Once the registration form is submitted you will receive the message above. The registration will be placed in queue to be reviewed by the State of Idaho. If the information is acceptable, vendor is approved.
- If any corrections are needed, the registration will be returned to the vendor. Vendor should monitor email for updates regarding approval.
- The Vendor can click the **Go To Your Dashboard** button to track the registration.

- Once on the vendor home page the vendor registration status can be tracked.

The screenshot displays the PaymentWorks vendor home page. The top navigation bar includes the PaymentWorks logo and an 'MC' badge. A left-hand sidebar contains navigation links for Home, Customers, Invoices, Remittances, News, Messages, Bank Accounts, and Remittance Addresses. The main content area is titled 'Home' and is divided into two primary sections: 'Customers' and 'Invoices'.

Customers Section: This section is titled 'Customers' with the subtitle 'View your customers and pending registrations'. It features a table with the following columns: 'Customer', 'Registration Submission Date', and 'Status'. A single row is visible with a submission date of '01/08/2025' and a status of 'Registration In Review'. Below the table, there is a pagination control showing 'Rows per page: 5' and 'Total Rows: 1'. A blue button labeled 'Go to Customers' is positioned below the table.

PaymentWorks News Section: This section is titled 'PaymentWorks News' and shows '1 of 2 Articles'. The featured article is 'Next Gen Remittances and Filtering Updates', dated 'April 03, 2024'. The article text states: 'PaymentWorks continues to deliver modern UI enhancements to our Payee Portal interface. Now available, Remittances page and filter features. You can now view your payment remittances all from Next Gen without having to go back to the Classic...'. A 'Read More' link is provided at the bottom right of the article.

Invoices Section: This section is titled 'Invoices' with the subtitle 'View your connected customer-uploaded invoices'. It features a table with columns: 'Customer', 'Invoice Number', 'Invoice Date', 'Invoice Amount', 'Paid Amount', 'Purchase Order', 'Invoice Status', and 'Scheduled Pay Date'. The table content is empty, with a message stating: 'There are no invoices to view. Check your filters and confirm you have connected customers.' and a link to 'Invoice Help'. Below the table, there is a pagination control showing 'Rows per page: 5' and 'Total Rows: 0'. A blue button labeled 'Go to Invoices' is positioned below the table.

At the bottom left of the page, there is a green and blue button labeled 'Return To PaymentWorks Classic' with a left-pointing arrow.

Updating Company Profile

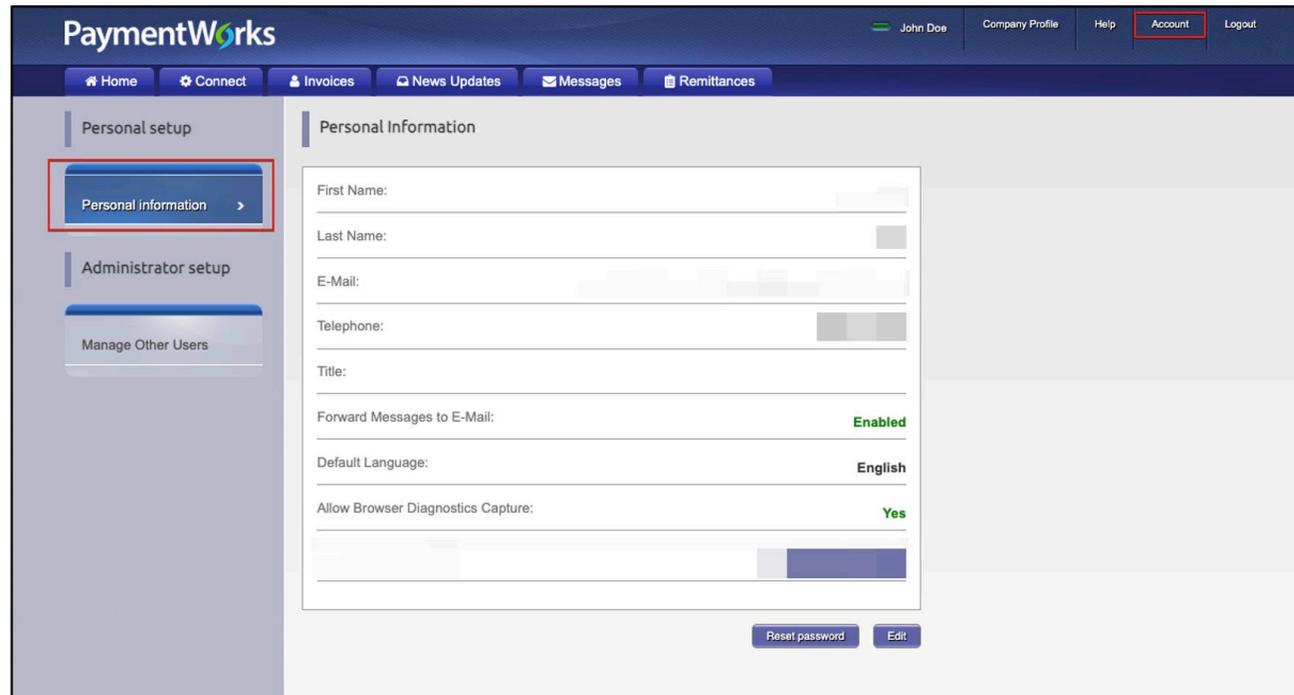
- To update your Company Profile, login to your PaymentWorks account and click the **Profile** icon with your initials in the top right and select **Company Profile**.

The screenshot displays the PaymentWorks user interface for updating a company profile. The top navigation bar includes 'Home', 'Connect', 'Invoices', 'News Updates', 'Messages', and 'Remittances'. The user's name 'John Doe' and the 'Company Profile' link are visible in the top right corner. The left sidebar contains a navigation menu with 'Marketing Information' selected. The main content area contains a form for updating company information, including fields for Company Name (DBA), Corporate Address, Telephone, Primary Account e-Mail, Website URL, and Business Description. There is also a section for uploading a logo with a 'Browse' button. The page includes a warning message: 'The following public information is visible to all payers in the PaymentWorks network'.

- Click the appropriate tab from the left side to update:
 - a. Marketing Information – Basic information such as Company Name (DBA) and contact information.
 - b. Business Details – Tax information such as Tax Country, Tax Identification Number, and Classification
 - c. Tax Forms – Upload or update any required tax documents
 - d. Order and Remittance Addresses – Manage the Order and/or Remittance Addresses where State of Idaho can submit payments. The Bank Accounts tab does not appear if no Remittance Address is indicated.
 - e. Banking Accounts – Add or update your banking information.

Updating Your Account Information

Your account information contains your **Personal Information**, including your Email address and Telephone number, which may differ from that in the Company Profile. It is also where you would reset your password, if needed. To update your Personal Information, login to your PaymentWorks account and click the **Profile** icon with your initials in the top right and select **Manage Account**.



The screenshot displays the PaymentWorks user interface. At the top, the user is logged in as John Doe, with navigation links for Company Profile, Help, Account (highlighted with a red box), and Logout. Below the navigation bar, there are tabs for Home, Connect, Invoices, News Updates, Messages, and Remittances. The main content area is divided into two sections: Personal setup and Administrator setup. Under Personal setup, the 'Personal information' link is highlighted with a red box. The 'Personal Information' form contains the following fields and options:

- First Name:
- Last Name:
- E-Mail:
- Telephone:
- Title:
- Forward Messages to E-Mail: Enabled
- Default Language:
- Allow Browser Diagnostics Capture: Yes

At the bottom of the form, there are two buttons: 'Reset password' and 'Edit'.

Resources

- If you have questions regarding the PaymentWorks platform or the PaymentWorks registration process, you can search for articles on the [PaymentWorks Support Center](#) or contact [PaymentWorks Support](#).
- For any questions regarding the State of Idaho's vendor management process, please contact servicedesk@sco.idaho.gov.