

PaymentWorks Vendor Invitation Requirements and Approval Workflow

This guide explains the new Procurement Services review process for PaymentWorks vendor invitations, including pre-submission requirements, Personalized Message standards, approval and rejection procedures, and best practices for ensuring accurate vendor onboarding.

Role: PaymentWorks Invite Initiator

Frequency: When Sending Invites

Prior to Sending new Invite

Purpose

Beginning August 1, 2026, all PaymentWorks New Vendor Invitations will be subject to a new Procurement Services review before being sent to the vendor.

Procurement Services will review each invitation to verify that:

- The vendor does not already exist in SAP S/4 Business Partner data.
- The Personalized Message contains all required information.
- The invitation is appropriate for vendor onboarding.

Invitations that meet all requirements will be approved and forwarded to the vendor. Invitations with missing or incorrect information may be rejected or canceled.

Department Responsibilities

The Procurement Services review is a validation step only and does not replace departmental responsibilities.

Departments remain responsible for:

- Searching SAP S/4 Business Partner data before sending a PaymentWorks invitation.
- Determining whether the transaction is with an individual or a business/entity.
- Reviewing all supporting documentation associated with the transaction.
- Providing a complete and accurate Personalized Message.

Departments should not rely on Procurement Services to identify existing vendor records or determine the correct vendor information required for a transaction.

Refer to **D-04 PaymentWorks Inviters: Best Practices for Vendor Searches and Managing Onboarding Console** for additional guidance.

Additional Information

Refer to Section D and related resources on the [Learning and Training page](#) (login required) for additional guidance.

Important: Successful procurement and payment transactions begin with accurate vendor identification. Departments are responsible for ensuring the correct vendor information is identified before sending a PaymentWorks invitation.

For questions, contact **VendorHelp@uky.edu**.

PaymentWorks Vendor Invitation Requirements and Approval Workflow

Sending New Invite Steps

1. Invite Fields

Enter the name of the individual or business for which you expect a vendor record to be created.

Whenever possible, send the invitation directly to the person who will complete and maintain the vendor registration.

The screenshot shows the 'Invite New Vendor' form. Callouts indicate the following fields:

- Company/Individual Name:** Enter the name of the person or business needing to be added as a vendor.
- Contact E-Mail:** Send the invitation to the email address of the individual responsible for completing and maintaining the PaymentWorks registration.
- Verify Contact E-Mail:** (Same as Contact E-Mail)

Other fields include: 'Is this for a University of Kentucky employee reimbursement?' (with a link), 'If yes, please stop and click CANCEL below', and a '*Required Field' label. Buttons for 'Cancel' and 'Send' are at the bottom right.

Important: If the recipient is not the appropriate contact, cancel the invitation and resend it to the person responsible for completing and maintaining the registration. Forwarding behavior should be avoided where possible.

2. Personalized Message

A Personalized Message is required for every invitation.

Important: The Personalized Message field has a 280-character limit. If your message exceeds this limit, refer to **D-06 PaymentWorks Invitation Personalized Message Guide** for additional templates and guidance.

The screenshot shows the 'Personalized Message' field. Callouts indicate the following required information:

- Department:** [Ag Sciences]
- Reason:** [is sending you a PaymentWorks invite for catering services related to the Farmers of Kentucky event. Per Quote #001, register as Joe's Pub at 100 Main St. Enter a separate remit address if listed on your invoice. Contact us if incorrect.]
- Event:** [the Farmers of Kentucky event]
- Supporting Document:** [Quote #001]
- Who is being onboarded:** [Joe's Pub]
- Location on quote:** [100 Main St]
- Extra Information for Quote Specific:** [Enter a separate remit address if listed on your invoice]
- Vendor Action:** [Contact us if incorrect]

Buttons for 'Cancel' and 'Send' are at the bottom right.

The Personalized Message must include:

1. Reason for Invite(*Event name, purchase type, service, or payment reason*)
2. Supporting Document (*Quote, invoice, Scope of Work (SOW), contract, etc.*)
3. Who Is Being Onboarded (*Expected individual or business name*)
4. Expected Location (*Address expected for the transaction*)
5. Vendor Action (*Instruct the vendor to contact your department if any expected information is incorrect before registering*)

3. Personalized Message Template

[Department Name] is sending you a PaymentWorks invite related to [purchase/payment reason]. Per the [quote, invoice, SOW, contract, etc.], please register as [Expected Name] using [Expected Address]. Contact us if incorrect.

4. New Send Message

After clicking **Send**, the following message will appear:

The screenshot shows a confirmation message: "Your invitation is pending approval before being sent to Joe's Pub at slse232.work+A3@gmail.com". An 'Ok' button is at the bottom right.

Your invitation is pending approval before being sent to [Vendor Name] at [Email Address].

PaymentWorks Vendor Invitation Requirements and Approval Workflow

Managing Rejected Invitations

1. New Status: Invitation Pending Approval

This status indicates the invite has been submitted to Procurement Services for review and has not yet been sent to the vendor.



If urgent, contact **VendorHelp@uky.edu** and provide the email address the invitation was sent to.

2a. Invitation Rejection

If an invitation is rejected, a message will be provided explaining the reason and any required action.

Depending on the reason, you may need to:

1. Correct and resubmit the invitation.
2. Review an existing vendor record identified by Procurement Services.
3. Cancel the invitation and use the existing vendor record.

The screenshot shows the 'Joe's Pub' invitation rejection page. Callout 1 points to the 'INVITATION REJECTED' status on 08/04/2026 10:53 AM. Callout 2 points to the 'INVITATION DETAIL' tab. Callout 3 points to the 'Approval History' section, which shows a rejection by Sarah Sexton on Aug 4, 2026 10:53 AM. Callout 4 points to the 'Resend Invitation' button. The page includes sections for 'Invitation Details' (Initiator: Sarah Sexton, Vendor Name: Joe's Pub, Contact E-mail: slse232.work+A3@gmail.com, Initiated: 08/04/2026, Invitation Reminders: Enabled), a 'Personalized Message' from Ag Sciences, and 'Initiator Fields' with a question about University of Kentucky employee reimbursement.

To Review a Rejected Invitation

1. Open the rejected invitation.
2. Select the **Invitation Detail** tab.
3. Review the rejection comment.
4. Resend or cancel the invitation as needed.

Quick Reference Card

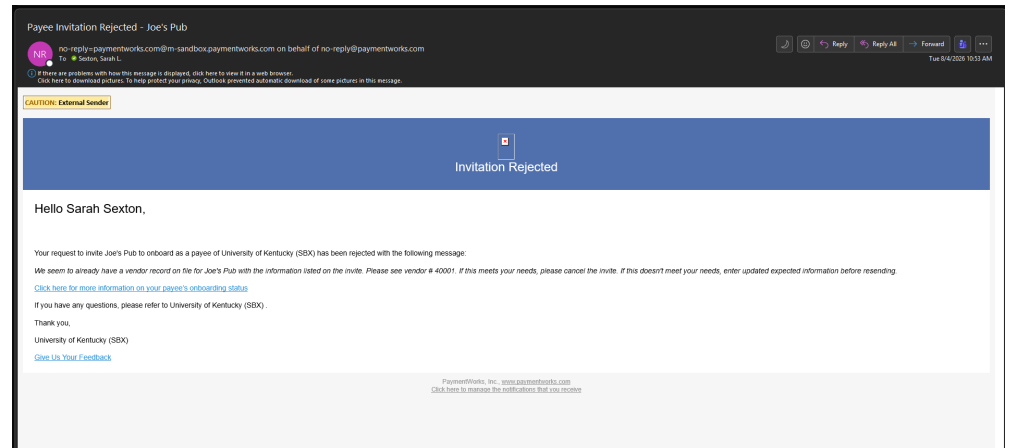
PaymentWorks Vendor Invitation Requirements and Approval Workflow

2b. Rejection Email

You will also receive an email notification if your invitation is rejected.

Do not reply to the notification email.

To review the rejection details and take action, select the link provided in the email or return to your PaymentWorks dashboard and open the invitation.



3. Resend Invite Instructions

To resend a rejected invitation, you must make at least one change to the invitation.

If you receive the message:

"At least one field must be changed in order to resend a rejected invitation."

Add a space to the **Company/Individual Name** field and make any other necessary updates before resubmitting.

A screenshot of the "Resend New Vendor Invitation" form. The form has several fields: "Company/Individual Name:" with a value of "Joe's Pub" and a red dashed box around it with the text "Add a space"; "Contact E-Mail:" with a value of "slse232.work+A3@gmail.com"; "Verify Contact E-Mail:" with a value of "slse232.work+A3@gmail.com"; and "Is this for a University of Kentucky employee reimbursement?:" with a dropdown menu showing "Yes - please stop and click CANCEL below:". Below the form, there is a red box with the text "At least one field must be changed in order to resend a rejected invitation." and two buttons: "Cancel" and "Send".

4. New Status: Invitation Resent

The **Invitation Resent** status appears when a previously rejected invitation has been corrected and resubmitted.

This status should be treated the same as **Invitation Approved & Sent**.



PaymentWorks Vendor Invitation Requirements and Approval Workflow

5. New Approval History Message

When an invitation has been approved and sent, review the Approval History Message located under Invitation Details.

This message provides tips and best-practice recommendations when all requirements have been met but improvement opportunities remain.

Important: This message is visible only to the inviter. The vendor cannot see it.

Joe's Pub

INVITATION INITIATED 08/04/2026 12:58 PM INVITATION RESENT 08/04/2026 1:00 PM

PROGRESS INVITATION DETAIL

Invitation Details

Initiator: Sarah Sexton (Sarah.Sexton@uky.edu) Vendor Name: Joe's Pub Contact E-mail: slse232.work+A3@gmail.com Initiated: 08/04/2026 Email Sent: 08/04/2026 Invitation Reminders: Enabled

Personalized Message

Ag Sciences is sending you a PaymentWorks invite for catering services related to the Farmers of Kentucky event. Per Quote #001, register as Joe's Pub at 101 Main St. Enter a separate remit address if listed on your invoice. Contact us if incorrect.

Initiator Fields:

Is this for a University of Kentucky employee reimbursement?: Yes - please stop and click CANCEL below.

Approval History:

Aug 4, 2026 1:00 PM: Approved by Sarah Sexton <Sarah.Sexton@uky.edu> (Procurement Approver)

Message: Please make sure to include the full address when character limits allow for it. Thank you.

Cancel Invitation Disable Reminders Resend Invitation