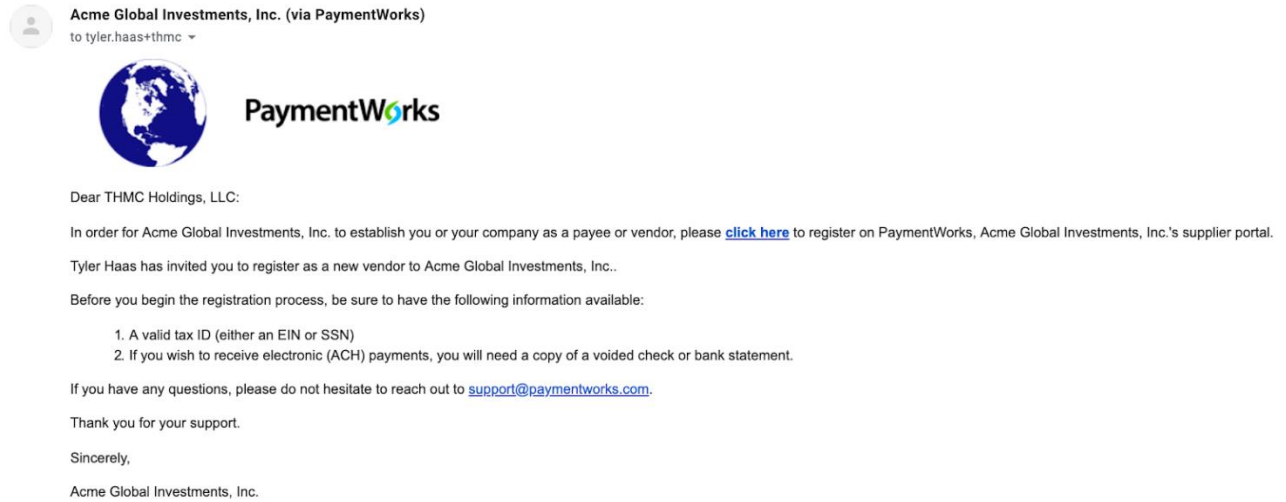


PaymentWorks Onboarding Instructions

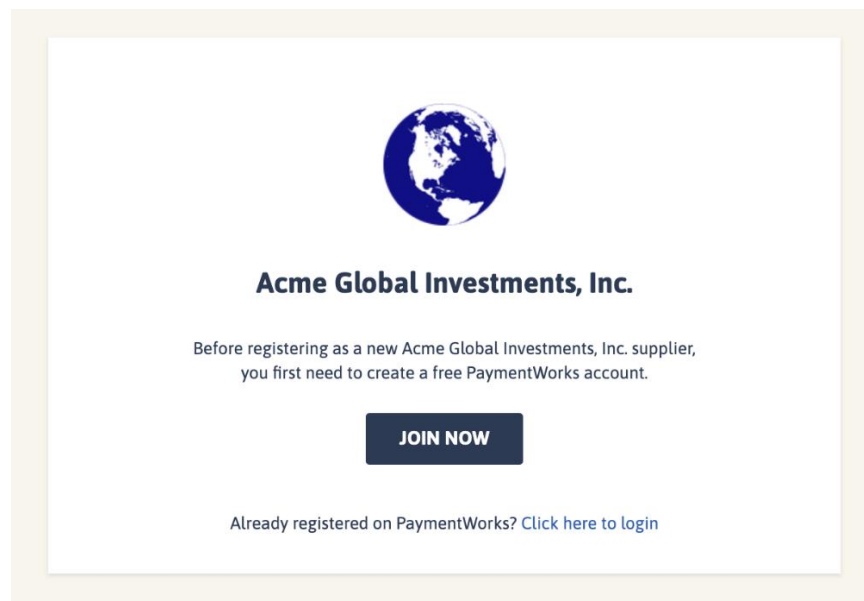
Step 1: The Payee Receives the Invitation

First, the payee will receive a PaymentWorks invitation, similar to the screenshot below. This message contains a special link for the payee to click to begin the process.



Step 2: Joining PaymentWorks

When the payee clicks the link, they will be directed to a screen that invites them to join PaymentWorks (screenshot below). If they are new to PaymentWorks, they will click the **Join Now** button to create their PaymentWorks account. If they have an existing account on PaymentWorks, they will click the **Click here to login** link and enter their login information for their existing account.



PaymentWorks Onboarding Instructions

Account creation page:

Payees (Suppliers)
Join PaymentWorks for Free

Personal Information


First Name	Last Name
------------	-----------

Company Name / Doing Business As (optional)

Title

Email

Confirm Email

 Telephone
--

Create Password

Password

Confirm Password

I agree to the [terms of service](#)

JOIN NOW

After creating a PaymentWorks account, the invited payee will receive an email asking them to confirm the validity of the email they provided. Once they click the **Verify Your Email** link, as shown in the screenshot below, they will be able to log into their PaymentWorks account. An account is not activated until the email is verified. In addition, once the email and account are verified, no one else will be able to respond to that invitation.

PaymentWorks Onboarding Instructions



PaymentWorks Support

to tyler.haas+thmc ▾

Thanks for registering!

Verify your email within the next 72 hours to activate your account, and then sign in to complete your registration.

[Verify Your Email and Complete Your Registration](#)

Thank you,
PaymentWorks

PaymentWorks

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

Step 3: The New Vendor Registration Form

After the payee has joined PaymentWorks and verified their email address, they will be brought to your organization's **New Vendor Registration form**.

The payee will provide their address, their tax information such as EIN (for businesses), SSN (for individuals), Foreign Tax ID (for foreign businesses or foreign individuals), as well as a W-9 form (or W-8 for foreign payees). If the payee has already submitted a New Vendor Registration form for another customer of theirs, the form will be pre-populated with their existing information.

Your organization may also require the prospective payee to submit bank account information to enable electronic payments.

PaymentWorks Onboarding Instructions



Acme Global Investments, Inc.

New Vendor Registration

Welcome, Brittany Jones!

In order to onboard as a new vendor, you will have to fill out and submit the following form to **Acme Global Investments, Inc.**

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

Tax Information

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

All other fields are optional.

For tax purposes, which best describes you?*

- Individual, Sole Proprietorship, or Single-member LLC
- Corporation or other complex business entity

Primary Address

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

All other fields are optional.

Country*

United States

Street 1*

Street 2

Step 4: Your Organization Approves the New Vendor Registration Form

Once the payee submits the registration form, users in your organization with the appropriate permissions will review and approve the submission. After approval, your payee is assigned a vendor number (if new) or connected to an existing vendor number. In addition, your internal ERP system will be updated with the payee's approved registration details. Once your organization connects the payee to their vendor number on PaymentWorks, PaymentWorks will notify you and your payee of their approval and vendor number via email.

PaymentWorks Onboarding Instructions

Note: *If you have any questions about the onboarding process, please open a support ticket with PaymentWorks by filling out the webform at <https://community.paymentworks.com/payers/s/contactsupport>.*