



PaymentWorks Payer Reference

Initiator Manual: Sending and Tracking Invitations

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Sending and Tracking Invitations

1. Overview

Your organization has selected PaymentWorks as a tool to help manage supplier information, optimize payments and alleviate the stresses on managing vendor information. The PaymentWorks platform creates efficiency in the process of obtaining business details and payment information from your organizations' vendors. In turn, vendors can submit and update their business information as necessary, as well as inquire about payments.

How Does PaymentWorks Work?

PaymentWorks is a platform through which your organization's finance department can "connect" with its new and existing vendors. Approved personnel send an invitation to new vendors also known as "payees" so they can create an account and make a connection to your Organization through PaymentWorks. Once vendors complete the registration form, their registration is then sent for approval by your organization. Once approved and connected with your organization's ERP. They will be able to view invoice and payment related updates, while providing your finance department with their latest profile information.

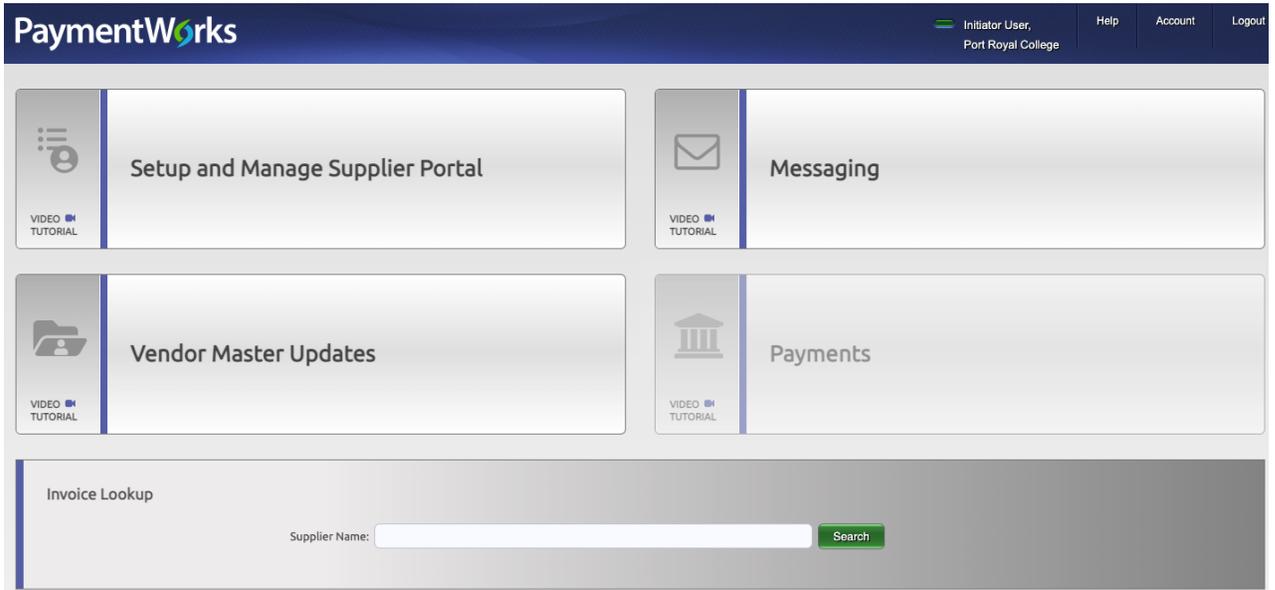
As an initiator in PaymentWorks, you can send out invitations to prospective vendors so they can go through the registration process. These invitations are sent through emails, using the email address submitted on the invitation form. Once you send an invitation, the vendor will have the opportunity to complete a New Vendor Registration form and submit their information. More details on this process are covered in Sections 3 and 4 of this document.

If you have any questions about PaymentWorks, please contact the finance department at your organization.

2. Getting Access to PaymentWorks

All PaymentWorks environments are set up using SSO or Single Sign On, for security purposes and ease of use. To access PaymentWorks locate the link provided by your organization, or reach out to your Finance Department for assistance in gaining access.

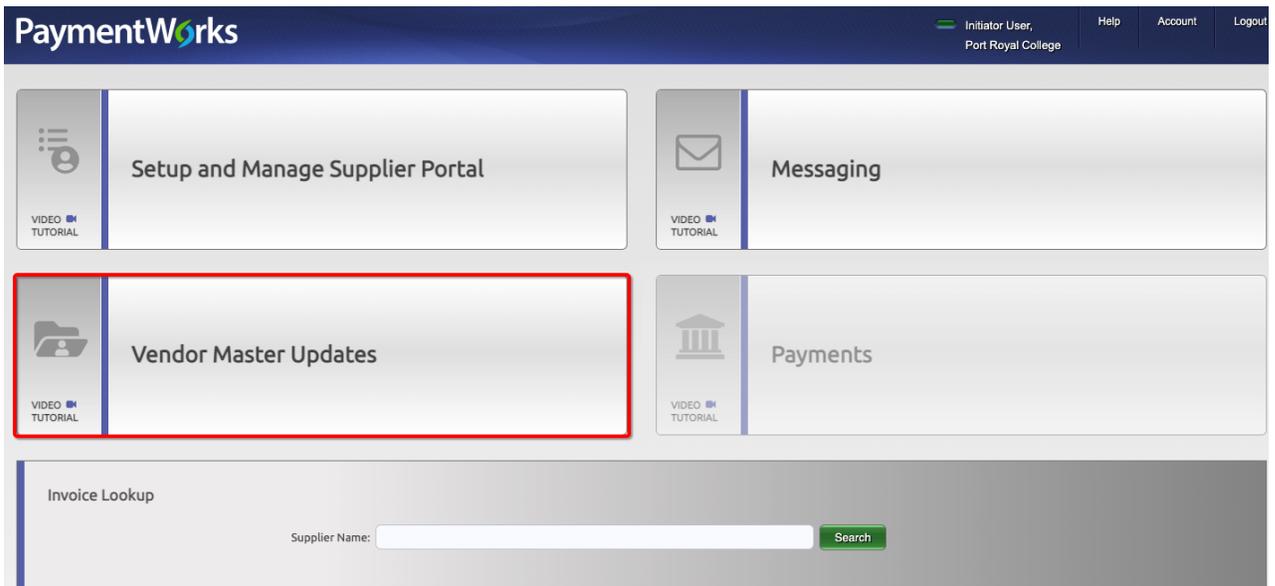
When you log in, the following screen will appear.



All users upon first login will be defaulted to a base role of an initiator. Initiators will be defaulted to only have access in specific and key areas of the PaymentWorks platform.

Navigating to the Onboarding Tracker

The Onboarding Tracker is home to all invitation data in PaymentWorks. Here users will be able to see which invitations have been sent and status updates of those invitations. To access the Onboarding Tracker click on the Vendor Master Updates tile.



Once in Vendor Master Updates, as an initiator you will be defaulted to the New Vendors tab and the Onboarding Tracker view or screen.

Depending on what permissions you are granted, you may also be able to toggle between the “Onboardings Tracker” view and the “Requests” view by clicking where the red box is shown below.

The screenshot displays the PaymentWorks Vendor Master Updates interface. The top navigation bar includes 'Home', 'New Vendors' (highlighted with a red box), and 'Reimbursements'. Below the navigation bar, a 'SHOW:' dropdown menu is also highlighted with a red box, currently set to 'Onboarding Tracker'. The main content area is titled 'Onboardings' and features a 'Sort By:' dropdown set to 'Date modified' and 'Descending'. A filter sidebar on the left shows 'Filter Results: 10 Records' and various search criteria like 'Vendor Name', 'Vendor #', and 'Contact E-Mail'. The main list displays onboarding progress for several vendors, each with a timeline of steps: 'INVITATION INITIATED', 'EMAIL VERIFIED - INVITATION RECEIVED', and 'REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW'. The vendor 'Danny Ocean' is shown as 'ONBOARDING COMPLETE' with a green checkmark. Other vendors like Gillian Owens, Kimberly Clerk, Eugene Levy, John Doe, Jessica's Baking Company, and The Great Bean Coffee are in various stages of the process.

- Onboardings is a record of invitations sent out.
- Requests is a view of all completed and submitted registrations (only visible to roles above the Initiator role)

Now, you will be able to send and resend invitations to payees, track these requests, and filter results to look up specific payees or onboarding statuses. These features are described in further detail in the sections below.

3. Sending Invitations

You can initiate the new vendor registration process by sending an invitation to the prospective vendor. You can do this by clicking on the Send Invitation button at the bottom of the left sidebar.

The screenshot displays the 'Onboardings Tracker' interface. At the top, there are navigation tabs for 'Home', 'New Vendors', and 'Reimbursements'. Below the navigation is a 'SHOW: Onboarding Tracker' dropdown. The left sidebar contains a filter section with 'Filter Results: 10 Records' and various input fields for 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', 'Show Cancelled Only', 'Source', and 'Invitation Initiator'. A 'Send Invitation...' button is highlighted with a red box at the bottom of the sidebar. The main content area, titled 'Onboardings', lists four vendors with their invitation status and dates:

Vendor Name	Invitation Status	Date
Gillian Owens	INVITATION INITIATED	03/01/2023 9:34 AM
Gillian Owens	EMAIL VERIFIED - INVITATION RECEIVED	03/01/2023 9:36 AM
Kimberly Clerk	INVITATION INITIATED	11/01/2022 1:01 PM
Kimberly Clerk	EMAIL VERIFIED - INVITATION RECEIVED	12/30/2022 8:19 AM
Eugene Levy	INVITATION INITIATED	02/03/2023 3:30 PM
Eugene Levy	EMAIL VERIFIED - INVITATION RECEIVED	02/03/2023 3:33 PM
Danny Ocean	INVITATION INITIATED	12/30/2022 8:06 AM
Danny Ocean	EMAIL VERIFIED - INVITATION RECEIVED	01/03/2023 11:43 AM

The invitation seen below shows the PaymentWorks standard invitation form. There may be additional fields in this invitation dialog box that have been set up by your finance department, which may be necessary to send an invitation (e.g. a memo, or other information about the vendor).

 Invite New Vendor

Company/Individual Name:*

Contact E-Mail:*

Verify Contact E-Mail:*

Description of Goods and Services:*

Initiator Name (first and last):*

*Required Field

Cancel Send

A number of the fields in this form (such as the Initiator information and the description of goods or services) are only visible by your organization. Your prospective vendor will not see these fields.

[Adding Personalized Messages to Invitations](#)

PaymentWorks offers the ability for invitations to include a personal message from the sender (also referred to as the “Initiator”) to the prospective vendor.

To add a personal message or any additional details you would like your invited payee to see, Initiators will see a text box at the bottom of the invitation screen.

Invite New Vendor

Initiator Phone Number:*

Reason for inviting this supplier:*

- Choose One -

Personalized Message:

*Required Field

Cancel Send

The maximum length of a personal message is 280 characters.

If your organization includes additional fields for the Initiator to provide, they will appear *above* the Personalized Message, which will always be displayed at the bottom of the dialog box.

Viewing the Message

When the invitation has been sent, the personal message will be captured and displayed in Onboardings, in the expanded record view, as shown below:

Danny Ocean

[INVITATION INITIATED](#)
12/30/2022 8:06 AM

[EMAIL VERIFIED - INVITATION RECEIVED](#)
01/03/2023 11:43 AM

[ONBOARDING COMPLETE](#)
01/06/2023 1:00 PM
Vendor Number: 9561234

PROGRESS

INVITATION DETAIL

ACCOUNT INFO

Invitation Details

Initiator:
Initiator User
(portroyalpw2019+initiator@gmail.com)

Vendor Name:
Danny Ocean

Contact E-mail:
portroyalpw2019+dannyocean@gmail.com

Initiated:
12/30/2022

Email Sent:
01/03/2023

Invitation Reminders:
Enabled

Personalized Message

please complete the form to so we can submit a PO

Initiator Fields:

Initiator Name (first and last): Ashley Silvera
Description of Goods and Services: Contractor
Initiator Email: portroyalpw2019+ashleysilvera@gmail.com
Initiator Department: Finance
Initiator Phone Number: 9548871345
Reason for inviting this supplier: Product and Service

Approval History:

Jan 3, 2023 9:09 AM: Approved by Procurement User <portroyalpw2019+procurement@gmail.com> (Procurement)

Message: None

If you resend the invitation, the most recent message will appear in the expanded record, as shown above.

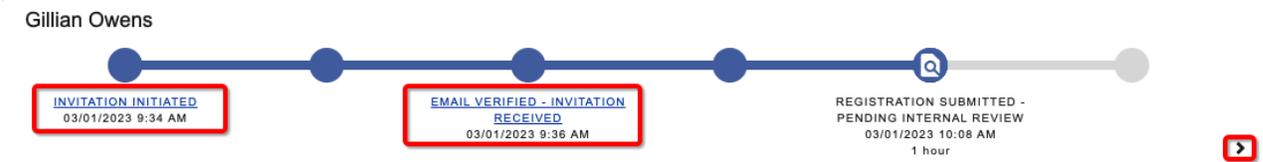
4. Tracking Invitations

When you start sending invitations, they will appear as shown above. You can use the filter options on the left side of the page to filter the list of new vendor onboardings. For example, if you wanted to look up the status of an invitation to the email address bobsmith@mail.com, you can type that email address in the Contact email field. If an invitation has gone out to that address, the page will only display the invitation that has been sent to that email address.

The screenshot shows the 'Onboardings' section of the 'Onboarding Tracker' interface. On the left, there are filter options for 'Filter Results: 1 Records' and a search field for 'Contact E-Mail' containing 'dannyocean'. The main area displays a list of onboarding records for 'Danny Ocean'. The record is expanded to show a progress bar with five stages: 'INVITATION INITIATED' (12/30/2022 8:06 AM), 'EMAIL VERIFIED - INVITATION RECEIVED' (01/03/2023 11:43 AM), and 'ONBOARDING COMPLETE' (01/06/2023 1:00 PM, Vendor Number: 9561234). A red arrow points to the 'Danny Ocean' name in the list. The 'Contact E-Mail' field is highlighted with a red box.

Expanding Invitations

More information for each invitation can be found by clicking on any of the status links along the progress bar in the invitation view. Additionally, the arrow to the far right lower corner of the invitation will also expand the invitation detail level.



The Invitation detail view will display information in three sections if the payee has created their account or two sections if they have not yet responded.

Payee has responded, created an account:

Gillian Owens

- [INVITATION INITIATED](#)
03/01/2023 9:34 AM
- [EMAIL VERIFIED - INVITATION RECEIVED](#)
03/01/2023 9:36 AM
- [REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW](#)
03/01/2023 10:08 AM
1 hour

PROGRESS **INVITATION DETAIL** **ACCOUNT INFO**

Onboarding Progress

- [INVITATION INITIATED](#)
Initiated By: Procurement User (portroyalpw2019+procurement@gmail.com)
03/01/2023 9:34 AM
- [INVITATION APPROVED & SENT](#)
Approved By: Procurement User (portroyalpw2019+procurement@gmail.com)
03/01/2023 9:34 AM
- [EMAIL VERIFIED - INVITATION RECEIVED](#)
Verified By: Gillian Owens (portroyalpw2019+gillianowens@gmail.com)
03/01/2023 9:36 AM
- [REGISTRATION SUBMITTED](#)
Submitted By: Gillian Owens (portroyalpw2019+gillianowens@gmail.com)
1 submissions
03/01/2023 10:08 AM
- [REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW](#)
03/01/2023 10:08 AM
Time in status: 1 hour
- [ONBOARDING COMPLETION](#)

Payee has not responded or created an account yet:

The screenshot shows a progress bar for 'The Great Bean Coffee' with two tabs: 'PROGRESS' and 'INVITATION DETAIL'. The 'PROGRESS' tab is active, displaying a vertical timeline of six steps: INVITATION INITIATED, INVITATION PENDING APPROVAL, INVITATION RECEIPT, REGISTRATION SUBMISSION, REGISTRATION APPROVAL, and ONBOARDING COMPLETION. The first two steps are highlighted in blue, indicating they are completed or in progress. The 'INVITATION PENDING APPROVAL' step includes a timestamp of 12/12/2022 7:44 PM and a duration of 78 days and 16 hours.

The Great Bean Coffee

PROGRESS | **INVITATION DETAIL**

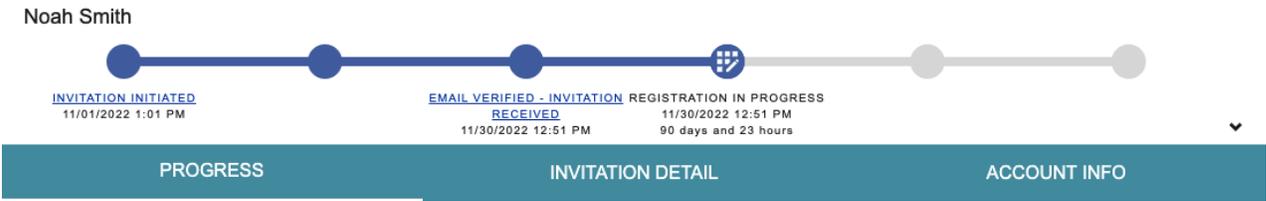
Onboarding Progress

- INVITATION INITIATED**
Initiated by: Initiator User (portroyalpw2019+initiator@gmail.com)
12/12/2022 7:44 PM
- INVITATION PENDING APPROVAL**
12/12/2022 7:44 PM
Time in status: 78 days and 16 hours
- INVITATION RECEIPT**
- REGISTRATION SUBMISSION**
- REGISTRATION APPROVAL**
- ONBOARDING COMPLETION**

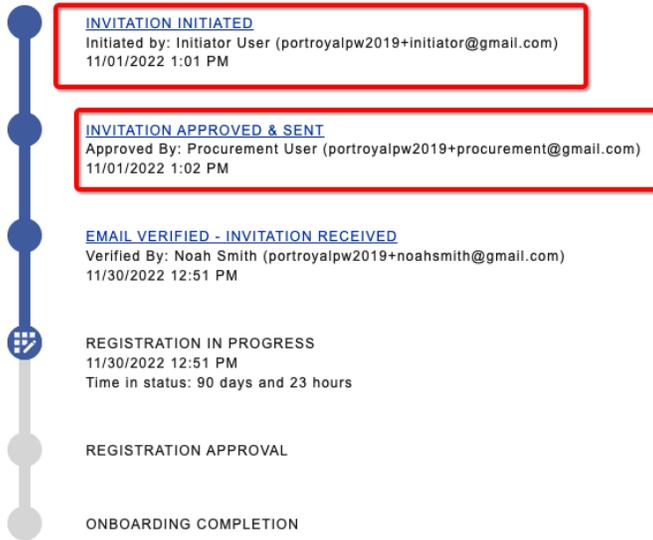
More Information Regarding the Invitation

The Progress Section will display each of the 6 steps that the invitation will go through until Onboarding Completion. Each step, once reached, will be date and time stamped along with any corresponding additional information.

The view provides more details along the 6 stages of onboarding while the main horizontal line displays the key statuses along the way.



Onboarding Progress



The Invitation Detail section will show the details entered on the invitation submission screen. If the payee has not created an account, the Initiator who sent the invitation will see an option to cancel the invitation. This will move this invitation to the “Show Canceled Only” screen, which can be accessed by checking the box in the filter menu.

Additionally, as seen in the screenshot below, if the prospective vendor has not clicked the invitation, you can resend the invitation, and cancel future reminders to that vendor about completing their registration.

FadEx

[INVITATION INITIATED](#)
03/01/2023 12:19 PM

[INVITATION APPROVED & SENT](#)
03/01/2023 12:20 PM

PROGRESS **INVITATION DETAIL**

Invitation Details

Initiator:	Vendor Name:	Contact E-mail:	Initiated:	Email Sent:	Invitation Reminders:
Initiator User (portroyalpw2019+initiator@gmail.com)	FadEx	portroyalpw2019+fadex@gmail.com	03/01/2023	03/01/2023	Enabled

Initiator Fields:

Initiator Name (first and last): Ashton Williams
Description of Goods and Services: Mailing Services
Initiator Email: portroyalpw2019+ashton@gmail.com
Initiator Department: Finance
Initiator Phone Number: 9085563214
Reason for inviting this supplier: Product and Service

Approval History:

Mar 1, 2023 12:20 PM: Approved by Procurement User <portroyalpw2019+procurement@gmail.com> (Procurement)
Message: None

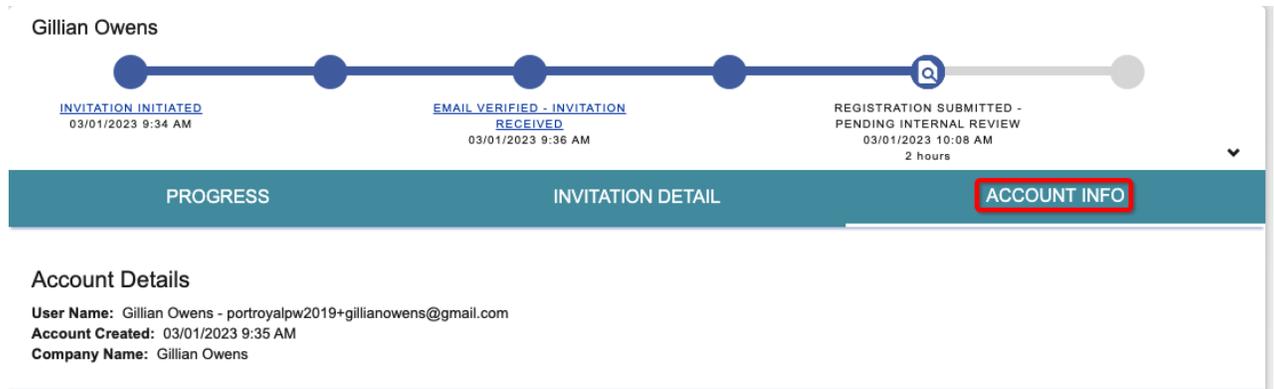
[Cancel Invitation](#) ✖
 [Disable Reminders](#) ✖
 [Resend Invitation](#) ↻

When you click on the “Resend Invitation” button, the same “send invitation” screen will appear as when you sent the invitation the first time. Here you will have a chance to edit the fields, like email address, name of the prospective vendor and more. Once a vendor opens the email, the option to Resend (as well as cancel reminders) is not available.

Note: Once you disable reminders or cancel an invitation, you cannot re-enable them. If you have cancelled an invitation, you will have to create a new invitation. If reminders are disabled, you can resend the invitation.

The Account section will show the details your prospective vendor submitted to create their PaymentWorks account. These details include:

- Name on the account
- Email associated with the user
- Company of the user
- Date account was created



Important Note: A vendor needs to create a PaymentWorks account first in order to submit a New Vendor Registration form to your organization to complete the onboarding process. Creating an account does *not* mean the vendor is finished with the new vendor registration process. Details on statuses for each column are shown in the next subsection.

5. Onboarding Statuses

First Circle: Invitation Initiation

- **Invitation Initiated** = Initiator sent an invitation.
- **Invitation Rejected** = Invitation was rejected by the initiator's organization.
- **Invitation Cancelled** = Invitation was cancelled by the initiator or another payer user.

Second Circle: Invitation Approval

- **Invitation Pending Approval** = Invitation is awaiting approval from another payer user.
- **Invitation Approved & Sent** = Invitation was approved by the initiator's organization or does not require approval from the initiator's organization and was emailed to the payee.

Third Circle: Invitation Receipt

- **Invitation Email Opened** = Payee opened the email invitation.
- **Invitation Link Clicked** = Payee clicked on the link in the email invitation to register with PaymentWorks.
- **Email Verified - Invitation Received** = Payee set up an account with PaymentWorks and verified their email address.

Fourth Circle: Registration Submission

- **Registration in Progress (no NVR yet)** = Payee began to fill out an NVR.
- **Registration Returned - Pending Resubmission** = Payee's NVR was returned and the payee needs to make changes and resubmit the NVR.
- **Registration Submitted** = Payee completed and submitted their registration form

and this registration form is no longer pending review (the registration form was reviewed and approved or rejected by the initiator's organization).

Fifth Circle: Registration Approval

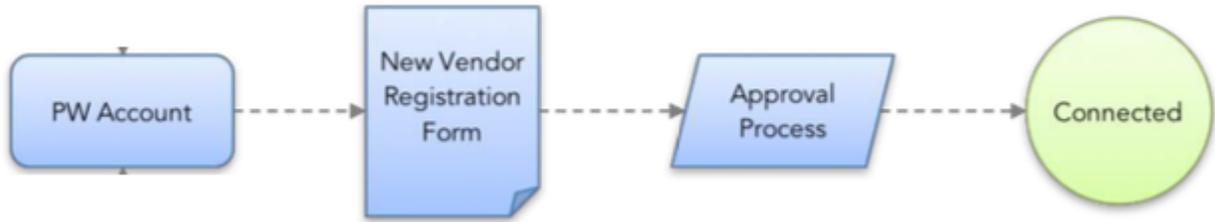
- **Registration Submitted - Pending PaymentWorks Review** = Payee completed and submitted their registration form. PaymentWorks is reviewing the payee's banking information.
- **Registration Submitted - Pending Payee Response** = Payee completed and submitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.
- **Registration Submitted - Pending Internal Review** = Payee completed and submitted their registration form. PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from the initiator's organization.
- **Registration Resubmitted - Pending PaymentWorks Review** = Payee completed and resubmitted their registration form. PaymentWorks is reviewing the payee's banking information.
- **Registration Resubmitted - Pending Payee Response** = Payee completed and resubmitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call.
- **Registration Resubmitted - Pending Internal Review** = Payee completed and resubmitted their registration form. PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from the initiator's organization.
- **Registration Rejected** = New vendor registration form was reviewed and rejected by the initiator's organization.
- **Registration Approved** = New vendor registration form was reviewed and approved by the initiator's organization.

Sixth Circle: Onboarding Completion

- **Registration Processed** = Information from the new vendor registration form was exported for integration into the organization's ERP.
- **Onboarding Complete** = Payee is set up for payment. The new vendor registration is in the organization's ERP and connected (linked) to the PaymentWorks application. The payee can view their invoice data in PaymentWorks.

6. The NVR Process

The following section outlines the steps a vendor you have invited will take to register and connect with your organization on PaymentWorks. This is included for insight into the onboarding process, should you receive any questions from your vendor about completing their New Vendor Registration. A visual overview of the process is included below:



Step 1: The Payee Receives the Invitation

First, the invitation payees receive will look something like the screenshot that is shown below. This message is configured by your organization's finance department, but always includes a special link to join PaymentWorks.

Port Royal College (via PaymentWorks) <invitations@paymentworks.com>
to portroyalpw2019+gillianowens ▾



PaymentWorks

Dear Gillian Owens:

Procurement User has invited you to register as a new vendor to Port Royal College.

In order for Port Royal College to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Port Royal College'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 Port Royal College directly.

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

Thank you for your support.

Sincerely,

Port Royal College

Step 2: Joining PaymentWorks

When the vendor clicks the link to join, they will be prompted to a screen that invites them to join PaymentWorks. From there, they can either create a new account (if they have created an account in PaymentWorks) or log in to their existing accounts (if they are connected with another customer on PaymentWorks).



Port Royal College

Before registering as a new Port Royal College supplier, you first need to create a free PaymentWorks account.

Join Now

Already registered on PaymentWorks? [Click here to login](#)

From there, they will create an account. The simple PaymentWorks registration form is shown below.

Payees (Suppliers)

Join PaymentWorks for Free

Your Information

First Name

Last Name

Company Name / Doing Business As (optional)

Title

 Telephone

Email

Confirm Email

Create Password

Password

Confirm password

I agree to the [Terms of Service](#)

Join Now

1 2 3 4

Vendor Registration Step 1 of 4

After they complete this section to create their PaymentWorks account, the invited payee will receive an email enabling them to verify their account. Once they click the "Verify email" button, as shown in the screenshot below, they will be able to log

in to their PaymentWorks account. A vendor cannot access their account if they do not verify their email.



An activation email has been sent to you. Please use the link in this email to activate your account.

Please note that there may be a delay of up to 24 hours before this message is delivered. Please check all of your filtered folders.



Vendor Registration Step 2 of 4

PaymentWorks <do-not-reply@paymentworks.com>
to portroyalp2019+gillianowens ▾

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.



Registration Almost Complete!

Click the Sign In button below to access and complete your New Vendor Registration Form.

Sign In



Vendor Registration Step 3 of 4

Once they log in, they will be prompted to fill out your organization's New Vendor Registration form and submit it. Once submitted and then approved by your organization's finance department, the connection process will be complete.

Step 3: The New Vendor Registration Form

After the payee has created a PaymentWorks account and verified their email address, the next time they login they will see your organization's new vendor registration form.

Through this form (sample screenshots below), vendors will provide their business profile information, including their address, their tax information such as EIN (for businesses) or SSN (for individuals), as well as a W9 form (or W8 for international vendors).

PaymentWorks

[Logout](#)



Welcome



Tax Information



Addresses



Additional Information



Port Royal College

New Vendor Registration

Welcome, Frank Johnson!

In order to onboard as a new vendor, you will have to fill out and submit the following form to **Port Royal College**.

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

[Save and Exit](#)

[Next](#)

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

(Country of Incorporation if using EIN)

Country of Citizenship*

United States

Are you using an SSN or EIN?*

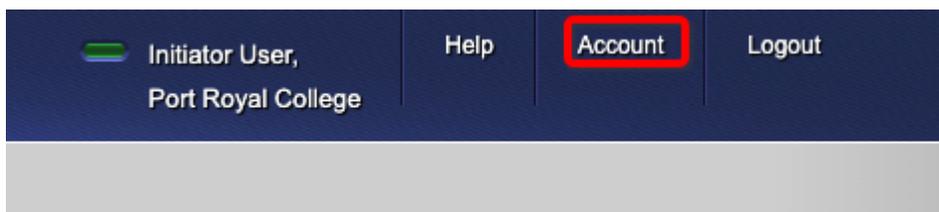
- SSN
- EIN

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

7. Managing your Account

All users will have access to their account information regardless of their role in PaymentWorks.

At the top right of the homepage, you will see "Account".



Clicking this will show your account information.

Account

Personal setup

Personal information >

Manage Notifications

Administrator setup

Company Information

Personal Information Need help ?

First Name:	Initiator
Last Name:	User
Email:	portroyalpw2019+initiator@gmail.com
Telephone:	
Title:	
Forward Messages to Email:	Disabled
Default Language	English
Allow Browser Diagnostics Capture	Yes
Persist Search Filters	Yes

[Reset password](#) [Edit](#)

Account will be broken into two sections. Personal setup and Administrator setup.

Personal setup houses personal information, where you can see items like First and Last name, email and so on. (See screenshot above for reference)

You can update certain pieces of information or preferences, however name and title changes must be done through your organization's SSO setup to ensure you do not lose access to PaymentWorks.

In the Manage Notifications section, users can turn on or off key emailed notifications. These notifications are specifically aimed at initiators, to alert them when key actions or steps have been reached or completed in regards to invitations they have sent.

To change which notifications you want to receive, click on the Edit button

Account

Personal setup

Personal information

Manage Notifications >

Administrator setup

Company Information

Manage Notifications Need help ?

Notify me when invitations I send are approved:	Enabled
Notify me when invitations I send are rejected:	Enabled
Notify me when invitations I send are received by my payee:	Enabled
Notify me if an invitation I send is cancelled:	Enabled
Notify me when a payee I invite submits their registration:	Enabled
Notify me when a payee I invite resubmits their registration:	Enabled
Notify me when a payee I invite has their registration rejected:	Enabled
Notify me when a payee I invite has their registration returned:	Enabled
Notify me when a payee I invite has their registration approved:	Enabled
Notify me when a payee I invite is fully onboarded:	Enabled
Notify me when invitations I send cannot be delivered:	Disabled

Edit

The Enabled/Disable notifications will change to check boxes. Uncheck the ones you no longer wish to receive, or check the ones you do want. One done, click save

Notify me when invitations I send are approved:	<input checked="" type="checkbox"/>
Notify me when invitations I send are rejected:	<input checked="" type="checkbox"/>
Notify me when invitations I send are received by my payee:	<input checked="" type="checkbox"/>
Notify me if an invitation I send is cancelled:	<input checked="" type="checkbox"/>
Notify me when a payee I invite submits their registration:	<input checked="" type="checkbox"/>
Notify me when a payee I invite resubmits their registration:	<input checked="" type="checkbox"/>
Notify me when a payee I invite has their registration rejected:	<input checked="" type="checkbox"/>
Notify me when a payee I invite has their registration returned:	<input checked="" type="checkbox"/>
Notify me when a payee I invite has their registration approved:	<input checked="" type="checkbox"/>
Notify me when a payee I invite is fully onboarded:	<input checked="" type="checkbox"/>
Notify me when invitations I send cannot be delivered:	<input type="checkbox"/>

The Final Section is Company Information, which displays your organization's address and logo.