PaymentWorks
Vendor Setup &
Maintenance Training
Training Objectives

• To present PaymentWorks as a vendor setup and maintenance platform for TTUHSC
  o Getting vendors set up with a PaymentWorks account
  o Once set up, vendors can log into their account and update their information when needed.

• To demonstrate how initiators (your role) can invite and onboard new and existing vendors to PaymentWorks

**Note:** PaymentWorks is only for vendors and **NOT** for TTUHSC employees and students. For TTUHSC employees and students, please continue to use the WebRaider portal and secure fax line to submit W9s.
What value does PaymentWorks bring to TTUHSC?

- Eliminate Payment Fraud
- Ensures Compliance
- Trust your payee identity information
- Eliminate #1 Pain Point in Procure to Pay Process
PaymentWorks

- PaymentWorks is a platform TTUHSC uses to connect financially and securely with its new and existing vendors.
- Approved personnel send an invitation to new vendors so they can create an account and make a connection with HSC through PaymentWorks.
- Invitations should only be sent to vendors when a requisition is required for payment.
- Before engaging with PaymentWorks, be sure you have created and submitted your TechBuy requisition so Vendor Team can verify the vendor information prior to approving the invitation.
- You will also be asked to provide your requisition number on the PaymentWorks invitation.
Logging into PaymentWorks

The system can be accessed from:

- [https://paymentworks.com/login/saml/?idp=ttu](https://paymentworks.com/login/saml/?idp=ttu)

- **WebRaider portal** > Business Affairs tab > Links to Financial Systems > System Links > PaymentWorks

- **WebRaider portal** > F&A Work Tools tab > Procurement Services > Purchasing Home > PaymentWorks

**Note**: Logging into this system requires two-factor Authentication.
Search for a Vendor/Payee

How to Search

Step 1:
Once logged into PaymentWorks, click Vendor Master Updates.

Step 2:
Next click the New Vendors Tab. Initiators will be defaulted to the New Vendors Tab.
A full repository of all invitations sent by users in your PaymentWorks will display.

Search for a Vendor/Payee
Search for a Vendor/Payee

How to Search

Step 3:
Under **Filter Results**, you can now search for the vendor via their email address or vendor name.

Next Steps:
This will bring any matching search results along with any corresponding information. If you do not see an invitation or any matches to your search, you will need to invite the vendor/payee.
Inviting a Vendor/Payee

How to Send Invitations

Step 1:
From the New Vendors Tab, click the **Send Invitation** button at the bottom of the filters section.

Step 2:
Fill out the invitation information.

**Note**: Anything marked with an asterisk is required.
Inviting a Vendor/Payee

How to Send Invitations

- Adding a Personalized Message is not required but is highly encouraged.

- TTUHSC recommended personalized template: *TTUHSC has partnered with PaymentWorks for our online vendor solution which is free to you. It adds fraud protection, invoice payment status, and ease of vendor information management. Shannon Myers from FSM invites you to register.*

- Click **Send**. You’ll receive a message that your invitation is pending approval before being sent to the requested vendor.
Inviting a Vendor/Payee

Sample Vendor Invitation

- Sample email that is sent to vendor after invitation is sent.
- The invitation contains:
  - Personalized message
  - Link that prompts the vendor to connect via PaymentWorks
Inviting a Vendor/Payee

After Invitation Sent

Step 1:
To allow the Vendor Team to quickly verify the vendor information, you will need to return to TechBuy and the requisition associated with the vendor and invitation submitted.

Step 2:
To find the information, go to Documents > Search > My Orders > My Requisitions.

Step 3:
Click the requisition, select the Comments tab.

Step 4:
Select the plus mark to add a comment such as PaymentWorks invite sent to Vendor. Click the check mark to save the comment.
Reviewing Invitation Status

How to View the Statuses of Sent Invitations

Step 1:
From the New Vendors tab in PaymentWorks, the Onboarding Tracker will display the progress of all invitations.
- Statuses are updated in real time.
- Each bubble will have multiple statuses available.

Step 2:
Click the arrow in a vendor invitation to reveal more details.
Reviewing Invitation Status

How to View the Statuses of Sent Invitations

Invitation Detail Column:
Click Invitation Detail in the details view of an Onboarding record.

The details revealed include:
- Name and email address of the initiator
- Vendor Name, as filled out in the invitation
- Vendor e-mail address, as filled out in the invitation
- Date the invitation was first sent (will only differ from first sent if the invitation was re-sent)
Reviewing Invitation Status

How to View the Statuses of Sent Invitations

**Progress Column:**
Select the Progress Column in a vendor invitation to display specific information regarding the onboarding progress.

Click a status link to return to the Invitation Detail section.
Onboarding Statuses

Statuses Explained by Area

Onboarding Progress

**INVITATION INITIATED**
Initiated by: Admin (tspw2023+admin@gmail.co)
04/04/2024 9:22 AM

**INVITATION APPROVED & SENT**
Approved By: Procurement (tspw2023+procurement@)
Message: approval note
04/04/2024 9:29 AM

**EMAIL VERIFIED - INVITATION RECEIVED**
Verified By: Test Name (tspw2023+TestCo@gmail.com)
04/04/2024 9:31 AM

**REGISTRATION SUBMITTED**
Submitted By: Test Name (tspw2023+TestCo@gmail.com)
1 submissions
04/04/2024 9:36 AM

**REGISTRATION APPROVED**
04/04/2024 9:39 AM

**ONBOARDING COMPLETE**
Vendor Number: 123456
Company Legal Name: Test Corporation
D&B: Test Co
Registration Submitted By: Test
04/04/2024 9:43 AM
## Onboarding Statuses

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation Initiated</td>
<td>Initiator sent an invitation</td>
</tr>
<tr>
<td>Invitation Rejected</td>
<td>The Vendor Team has rejected the submitted registration form</td>
</tr>
<tr>
<td>Invitation Cancelled</td>
<td>Invitation was cancelled by the initiator or another payer user</td>
</tr>
</tbody>
</table>
## Onboarding Statuses

### Invitation Approval

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation Pending Approval</td>
<td>Invitation is awaiting approval from another payer user</td>
</tr>
<tr>
<td>Invitation Approved &amp; Sent</td>
<td>Invitation was approved by TTUHSC and was emailed to the payee</td>
</tr>
</tbody>
</table>
## Onboarding Statuses

### Invitation Receipt

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation Email Opened</td>
<td>Vendor/Payee opened the email invitation</td>
</tr>
<tr>
<td>Invitation Link Clicked</td>
<td>Vendor clicked the link in the email invitation to register with PaymentWorks</td>
</tr>
<tr>
<td>Email Verified – Invitation Received</td>
<td>Vendor set up an account with PaymentWorks and verified their email address</td>
</tr>
</tbody>
</table>
## Onboarding Statuses

### Registration Submission

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration in Progress (no NVR yet)</td>
<td>Initiator sent an invitation</td>
</tr>
<tr>
<td>Registration Returned – Pending Resubmission</td>
<td>Vendor’s NVR was returned, and the vendor needs to make changes and resubmit the NVR</td>
</tr>
<tr>
<td>Registration Submitted</td>
<td>Vendor completed and submitted their registration form for review</td>
</tr>
<tr>
<td>Status Displayed</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Registration Submitted – Pending PaymentWorks Review</td>
<td>PaymentWorks is reviewing the vendor’s banking information</td>
</tr>
<tr>
<td>Registration Submitted – Pending Payee Response</td>
<td>PaymentWorks called the vendor and left a message, and the vendor needs to return the phone call</td>
</tr>
<tr>
<td>Registration Submitted – Pending Internal Review</td>
<td>PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from the Vendor Team</td>
</tr>
<tr>
<td>Registration Resubmitted – Pending PaymentWorks Review</td>
<td>Vendor completed and re-submitted their registration form. PaymentWorks is reviewing the vendor’s banking information</td>
</tr>
</tbody>
</table>
## Onboarding Statuses

### Registration Approval

**Part 2**

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Resubmitted – Pending Payee Response</td>
<td>Payee completed and re-submitted their registration form. PaymentWorks called the payee and left a message, and the payee needs to return the phone call</td>
</tr>
<tr>
<td>Registration Resubmitted – Pending Internal Review</td>
<td>Payee completed and re-submitted their registration form. PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from the Vendor Team</td>
</tr>
<tr>
<td>Registration Rejected</td>
<td>New vendor registration form was reviewed and rejected by the Vendor Team</td>
</tr>
<tr>
<td>Registration Approved</td>
<td>New vendor registration form was reviewed and approved by the Vendor Team</td>
</tr>
<tr>
<td>Status Displayed</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Registration Processed</td>
<td>Information from the new vendor registration form was exported for integration into Banner</td>
</tr>
<tr>
<td>Invitation Approved &amp; Sent</td>
<td>Payee is set up for payment. The new vendor registration is in Banner and connected (linked) to the PaymentWorks application. The payee can view their invoice data in PaymentWorks</td>
</tr>
</tbody>
</table>
Troubleshooting

• Online Help
• Customer Support
• FAQs
When do I contact PaymentWorks Support versus the TTUHSC Vendor Team Support?

**PaymentWorks** handles platform support such as completing a vendor registration, updating vendor information, PaymentWorks emails not being received and general PaymentWorks platform questions.

**TTUHSC Vendor Team** handles items relating to specific customer fields on the registration form, status of the registration, tax-related inquiries, and questions on payments and/or invoices.

For more detailed information about the differences in support, read this [helpful article](#) on the topic.
Online Help

- Use the **Help** button in the top right of the PaymentWorks screen or click the **Need Help** symbols to access the Help Center and to find articles related to Onboarding.

- Click a Video Tutorial button from the main screen or from your onboarding screen.
Online Help

- The PaymentWorks Help Center provides articles by topics

- Create a Support ticket using the **Contact Support** button in the Help Center

- To manage the type of email notifications you receive during the onboarding process, refer to this **PaymentWorks Help article**.
Online Help

- Use the **Training Center** for TTUHSC training documentation related to PaymentWorks

- Use the Filter by Category option to select PaymentWorks
Is the vendor connected? I didn’t receive the Vendor Number.

- You will receive an automated email with the Banner vendor number once the vendor has been approved and connected to Banner.
- You can also see the vendor number in the Vendor Master Updates in PaymentWorks.
- The vendor will also receive an automated email that they are connected to PaymentWorks.
The vendor deleted their email invitation or did not receive their emailed invite.

- Verify the vendor checked their spam folder for the invite.
- You can resend an invitation. To resend an invitation:
  - Click the Invitation Status link (third bubble)
  - At the bottom of the Invitation Details screen, click the Resend Invitation button.
I entered the wrong email address or made a typo.

- Departments can correct and resend invitations until the Vendor creates their account.

- To resend an invitation with the correct email address:
  - Click the Invitation Status link
  - At the bottom of the Invitation Details screen, click the Resend Invitation button
  - Enter the correct email address under Contact Email
  - Click the Send button when finished.
Troubleshooting

The vendor will no longer be used OR how do I cancel an invitation.

This process can only be completed until the vendor creates their account, once created you cannot cancel the invitation.

• Click the Invitation Status link.

• Next, click the Cancel Invitation button.

• A confirmation screen will appear, click the OK button.
My vendor has not completed their form to register.

- Vendor will receive emails until the registration is completed or the reminders are cancelled.
- Reminder email notifications are automatically generated. Do not resend invitations unless the vendor notifies you that they did not receive the initial email:
  - 1st reminder – three days
  - 2nd reminder – seven days
  - 3rd reminder – 14 days
  - 4th reminder – 21 days
  - 5th reminder – 28 days
I want to stop sending reminders to my vendor OR my vendor has asked me to stop sending reminders.

- Click the Invitation Status link.
- Next, click the Disable Reminders button.
- A confirmation screen will appear, click the OK button.
If you have additional questions, please contact the Vendor Team at vendorteam@ttuhsc.edu.