Finance Systems Management

Vendors from your PaymentWorks account go through various invitation and onboarding stages.

To check the progress of a vendor, access the system through:

- PaymentWorks
- <u>WebRaider portal</u> > Business Affairs tab > Links to Financial Systems > PaymentWorks

TEXAS TECH UNIVERSITY	Business Affairs	
TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER. WebRaider	HSC / Business Affairs	
Home		
nome		
Employee		
	Commonly Used Links	Links to Financial Systems
Available Budget ^{<}	Commonly Used Links	System Links
F&A Work Tools	Calendar	Cash Receipts
	Cognos	Chrome River - PCard and Travel
Payroll & Tax	Forms Center	Cognos
Business Affairs	News Center	Contract AR/Billing
	Training Center	Contracting
Supervisor	User Groups	Effort Certification and Reporting Technology (ecrt)
		ePrint
My Content	Department Homepages	Financial Manager Change Request
Cognos	Accounting Services	Financial Transaction System (FiTS)
	Application Development	Fleet Certification
Facilities & Safety	Business Affairs	Fund Maintenance System
News	Contracting	Gateway
inews	Finance Systems Management	Laserfiche
	General Click	Merchant Account
	Parking PaymentWorks	Package Tracking
	Payment	PaymentWorks
	Property Management	PO/Encumbrance Change Request

Click Vendor Master Updates.

Payme	entW ørks	Shannon Myers, Help Account Logout Texas Tech University (Test)		
VIDEO I	Setup and Manage Supplier Portal	Messaging		
VIDEO R TUTORIAL	Vendor Master Updates	Click Vendor Master Updates		

The **New Vendors** tab will display. Enter a **Vendor Name** to filter records. No wildcard is needed like in Banner.

Payment₩ <mark>≶</mark> rl		-	Shannon Myers, Texas Tech University (Test)	Help Account Logout
Home New Venc	Vendor Name	_		
VIDEO TUTORIAL Filter Results: 39 Records			Sort By: Date modified V Descendin	ig 🗸 Need help 🔞
Vendor Name: Vendor #:			REGISTRATION SUBMITTED -	•
Contact E-Mail:	04/18/2024 8:18 AM	RECEIVED 04/18/2024 8:26 AM	PENDING INTERNAL REVIEW 04/17/2024 10:42 AM 1 hour	>

The status of your vendor will display. Click the **arrow** to view more details regarding the onboarding tracker process.



This example shows a completed and processed vendor registration.



This is an example of a registration that has been **Returned** to the vendor as PaymentWorks needs more information from the vendor.

	PROGRESS	INVITATION DETAIL	ACCOUNT INFO
Onboardin	g Progress		
	INVITATION INITIATED Initiated by: Robert Ortega (Robert.o 03/11/2024 5:58 PM	rtega@ttuhsc.edu)	
	INVITATION APPROVED & SENT Approved By: Procurement (ttupw202 03/11/2024 6:01 PM	23+procurement@gmail.com)	
	EMAIL VERIFIED - INVITATION REC Verified By: Spotify Inc (healthelpase 03/12/2024 1:30 PM		
	REGISTRATION RETURNED - PEND 1 submissions 03/12/2024 2:55 PM Time in status: 36 days and 18 hours		
	REGISTRATION APPROVAL		
	ONBOARDING COMPLETION		

Vendor Registration Status Explanations

Vendor Account Statuses

- No Account The vendor has not yet created an account on PaymentWorks.
 - An invitation will need to be sent to a valid vendor email address (ensure the contact has access to corporate and banking info).
- **Registered** The vendor has created an account on PaymentWorks.
 - If a vendor is already setup (status = onboarding complete), it's possible you just need to send a request to have them update their record within their existing PaymentWorks account. The Vendor team would then be alerted to review the updated submission.
- Email Validated The vendor has registered and verified their email address.

New Vendor Registration Statuses

- Not Started The vendor has not started filling in the registration form.
- In Progress The vendor has started filling in the registration form but has not completed it.
- Submitted Pending PaymentWorks Review The vendor has completed and submitted the registration form. PaymentWorks is now in the process of reviewing the vendor's banking information.
- **Submitted Pending Internal Review** The vendor has completed and submitted the registration form. PaymentWorks has reviewed the bank account, and the registration is now waiting for internal review from the Vendor team.

- **Returned** If more information is needed from the initiator or vendor. The vendor will be emailed directly with the requested correction. They will also receive a message in their "Messages" tab.
- Approved The vendor registration has been approved.
- **Rejected** The registration form for this vendor has been rejected.
- Processed The registration has been processed and sent to your system of record.
- **Complete** The vendor registration process is complete, the vendor record has been created, and the vendor number has been issued. The vendor number will appear under New Vendor Registration.

NOT STARTED	Department invites Vendor.
REJECTED	Vendor chose to not complete registration.
IN PROGRESS	Vendor receives invitation and works on registration.
SUBMITTED	Vendor completes registration and submits to PW.
RETURNED	• If more information is needed from the initiator or vendor.
APPROVED	 Registration has passed PW validation and approved by TTUHSC.
PROCESSED	Registration has been processed and sent to Banner.
COMPLETED	Vendor/department invitee is notified of Vendor Approval/R#.

Workflow from Start to Finish

Completion Time

TTUHSC can only estimate the time from **Approved** to **Completed**. Once we approve the vendor, a **connected** file is sent to PaymentWorks. We send a **connected** file every business afternoon. The following business day, the vendor and department invitee should receive the automated email stating approval and vendor number. The other status conditions rely on the vendor and PaymentWorks.

If you have additional questions, please contact the Vendor team at <u>vendorteam@ttuhsc.edu</u>.

Visit the <u>Help Center</u> within PaymentWorks for training videos and additional help documentation. To manage the type of email notifications you receive during the onboarding process, refer to this <u>PaymentWorks Help article</u>.