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

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WebRaider	HSC / Business Affairs			
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Employee				
	Commonly Used Links		Links to Financial Systems	
Available Budget <	Common half had the last		Custom Holes	
F&A Work Tools			System Links	
	Calendar		Cash Receipts	
Payroll & Tax	Cognos			
	Nous Contor		Contract AD/Billing	
Business Affairs	Training Contor		Contract Ak/bining	
Supervisor			Effort Cortification and Penerting Technology (acrt)	
Superviser			ePrint	
My Content	Department Hemovages		Einancial Manager Change Request	
	Department Homepages		Financial Transaction System (FiTS)	
Cognos	Application Development		Fleet Certification	
Facilities & Safety	Rusiness Affairs		Fund Maintenance System	
	Contracting		Gateway	
News	Finance Systems Management		Laserfiche	
	General		Merchant Account	
			Package Tracking	
	Payment Works	\rightarrow	PaymentWorks	
	Property Management		PO/Encumbrance Change Request	

Click Vendor Master Updates.

Payme	entWørks	Shannon Myers, Help Account Logo Texas Tech University (Test)	Shannon Myers, Help Account Logout Toxas Tech University (Test)		
	Setup and Manage Supplier Portal	Messaging			
VIDEO ®M 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.

PaymentWorks # Home • New Vendors or SHOW: Onboarding Tracker •	Vendor Master Ubdates Enter Vendor Name		Shannon Myers, Texas Tech University (Test)
VIDEO TUTORIAL Filter Results: 39 Records	Onboardings Company Inc.		Sort By: Date modified V Descending V Need help 🕑
Vendor Namo: Vendor #: Contact E-Mail:	INVITATION INITIATED 04/10/2024 8:18 AM	EMAIL VERIFIED - INVITATION RECEIVED 04/10/2024 8:28 AM	REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW ONIT70224 10:24 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	Onboarding Progress				
ſ	INVITATION INITIATED Initiated by: Robert Ortega (Robert.or 03/11/2024 5:58 PM	tega@ttuhsc.edu)			
	INVITATION APPROVED & SENT Approved By: Procurement (ttupw202 03/11/2024 6:01 PM	3+procurement@gmail.com)			
	EMAIL VERIFIED - INVITATION RECE Verified By: Spotify Inc (healthelpaso 03/12/2024 1:30 PM	<u>EIVED</u> +spotify@gmail.com)			
	REGISTRATION RETURNED - PENDI 1 submissions 03/12/2024 2:55 PM Time in status: 36 days and 18 hours	NG RESUBMISSION			
	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>.