



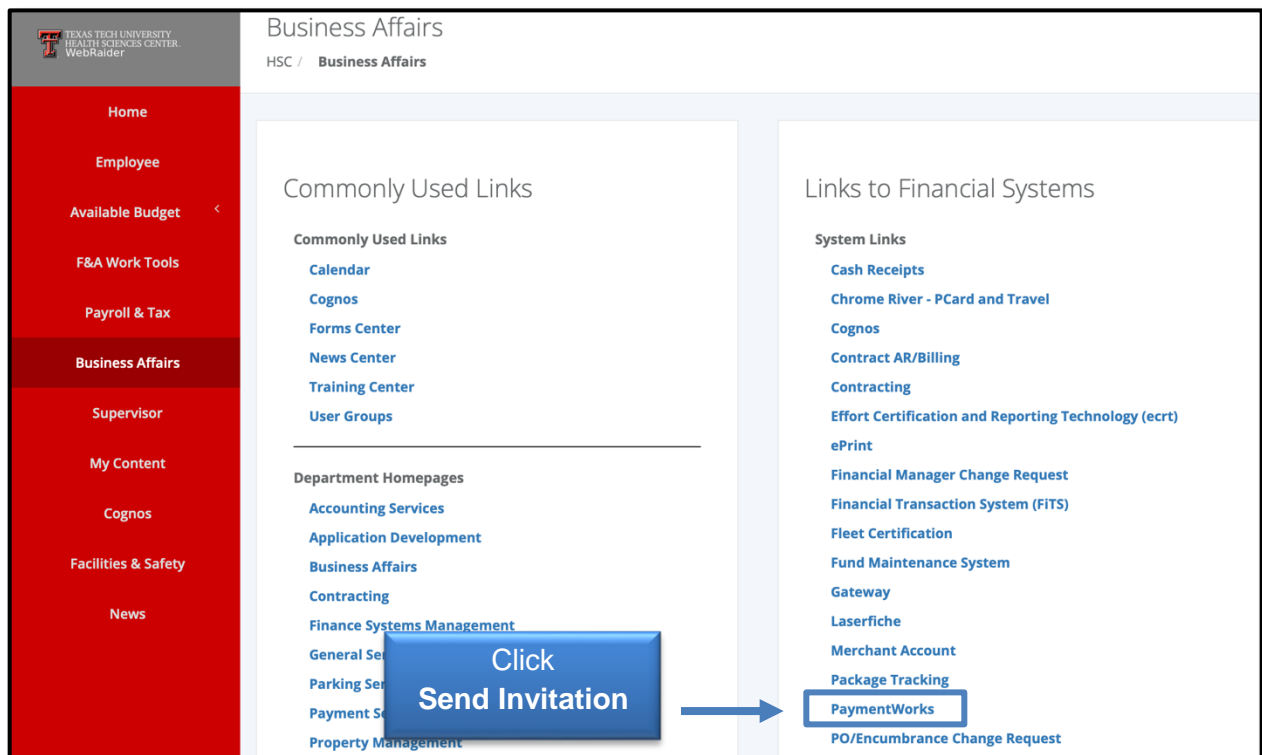
PaymentWorks is a platform TTUHSC uses to connect financially and securely with its new and existing vendors. Approved personnel send an invitation to new vendors so they can create an account and make a connection with HSC through PaymentWorks. Invitations should only be sent to vendors when a requisition is required for payment.

As an initiator, review the following prospective vendors so they can go through the registration process.

- Business – send an invite to a new vendor if the business is not located in TechBuy or PaymentWorks.
- Individual/Sole Proprietor – send a new vendor invite if the individual is not in TechBuy or PaymentWorks.
- Employees, Students or Perspective Employees – should not be entered in PaymentWorks. Instead, send Vendor Setup Form to vendorteam@ttuhsc.edu.

The system can be accessed from:

- [PaymentWorks](#)
- [WebRaider portal](#) > Business Affairs tab > Links to Financial Systems > System Links > PaymentWorks

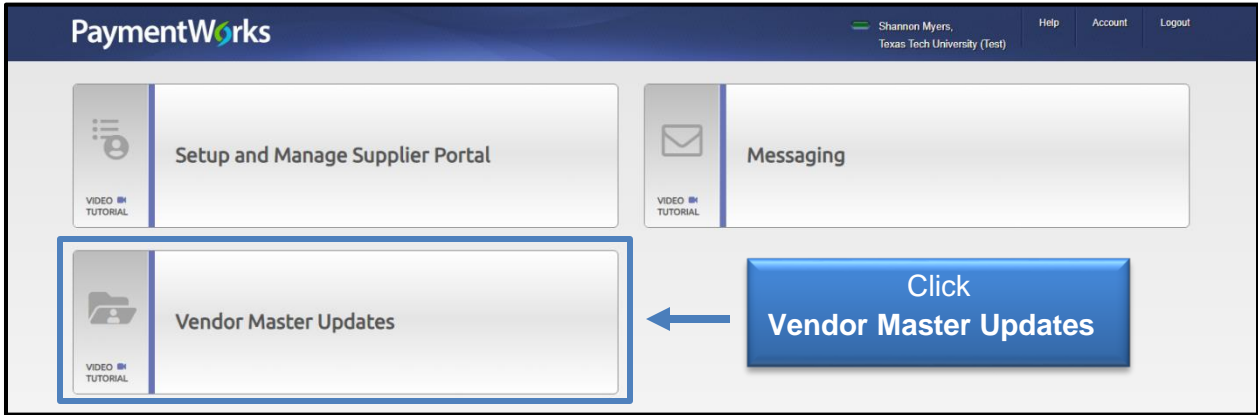


Sending Invitations

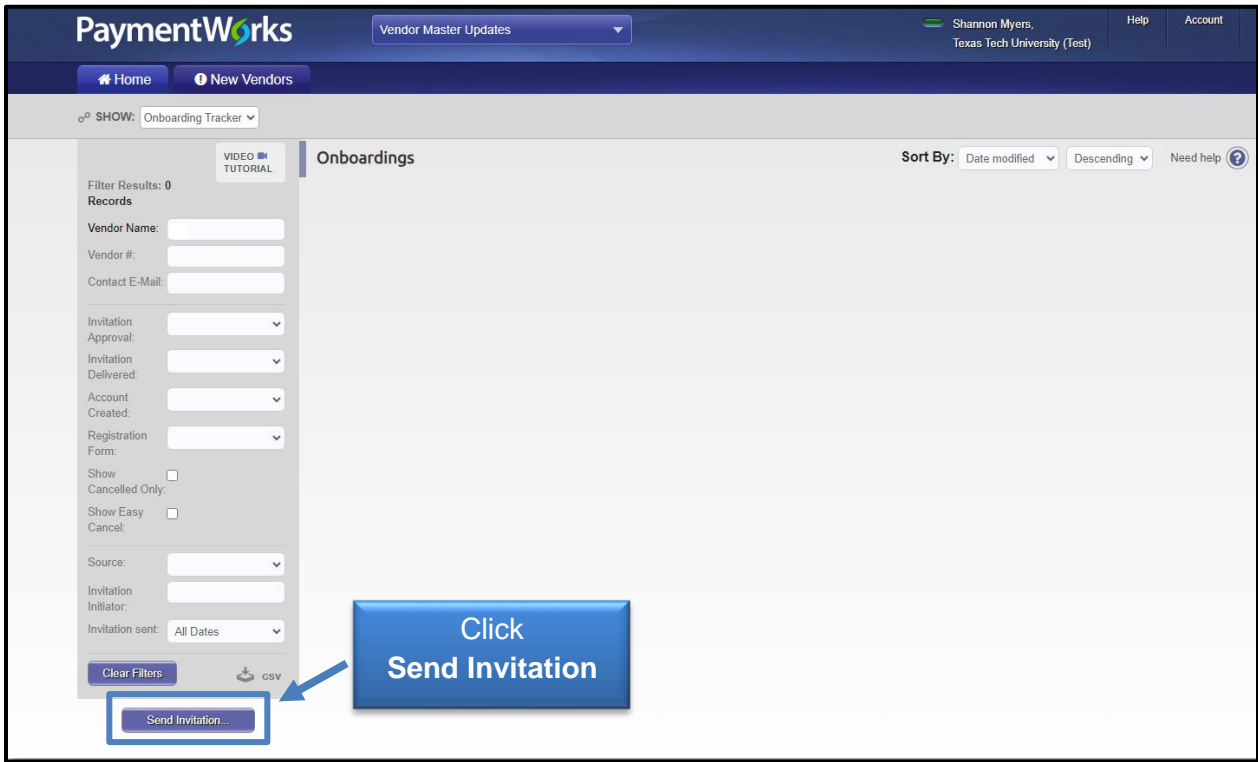
From the PaymentWorks dashboard, initiate the new vendor registration process by sending an invitation to the new vendor.

PaymentWorks – Vendor Invitations Training

Click **Vendor Master Updates**.



The **New Vendors** tab in the menu bar will display. Click **Send Invitation** at the bottom of the left sidebar to invite a new vendor.



PaymentWorks – Vendor Invitations Training

The Invite New Vendor screen contains the fields seen below. Use the scroll bar on the right side to navigate the fields. Required fields are indicated with an asterisk*.

Invite New Vendor

Company/Individual Name:*

This field is required.

Contact E-Mail:*

Verify Contact E-Mail:*

Description of Goods and Services:*

*Required Field

Enter information for required fields

Invite New Vendor

Initiator Email:*

Initiator Department:*

Initiator Phone Number:*

Reason for inviting this supplier:*

- Choose One -

Personalized Message:

*Required Field

Cancel Send

Adding a Personalized Message is highly encouraged. The message will be included in the email sent to the new vendor.

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. "Insert Department contact name" from "Insert Department Name" invites you to register.

Invite New Vendor

Initiator Phone Number:

Reason for inviting this supplier:*

- Choose One -

Personalized Message:

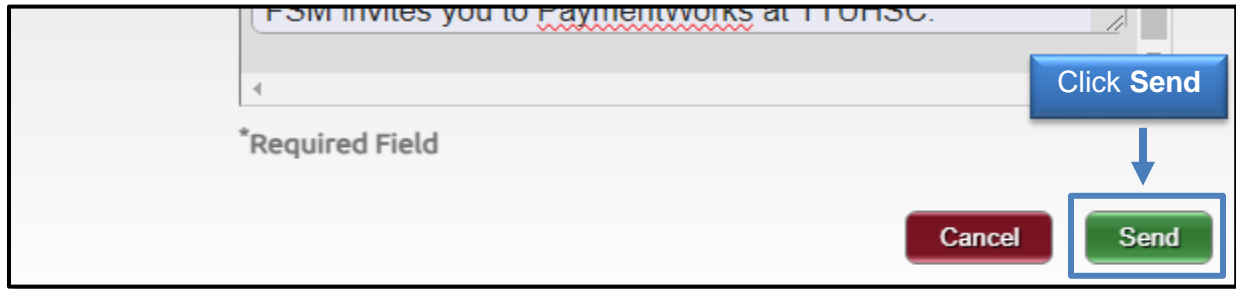
TTUHSC has partnered with PaymentWorks for our online vendor solution which is free to you. It adds fraud protection, invoice payment status, and ease of vendor information management. Shannon Myers from FSM invites you to register.

*Required Field

Cancel Send

PaymentWorks – Vendor Invitations Training

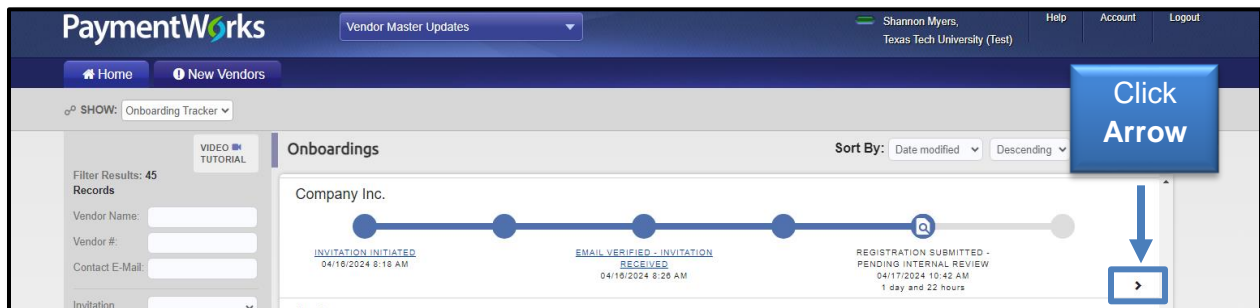
Once all the information is entered in the invitation, click **Send**.



You'll receive a message that your invitation is pending approval before being sent to the requested vendor.

Viewing Invitations

Invitations may be viewed by employees with access to PaymentWorks from the New Vendors tab. The Onboarding Tracker displays all invitation statuses in real time. Each bubble will have multiple statuses available. More specific invitation details may be viewed by clicking the **arrow** in a vendor invitation.



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)

PaymentWorks – Vendor Invitations Training

The screenshot displays the PaymentWorks interface for managing vendor invitations. The main area shows a progress bar for 'Company Inc.' with three stages: 'INVITATION INITIATED' (04/16/2024 8:18 AM), 'EMAIL VERIFIED - INVITATION RECEIVED' (04/16/2024 8:26 AM), and 'REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW' (04/17/2024 10:42 AM). A blue box highlights the 'INVITATION DETAIL' tab, and a blue arrow points to it with the text 'Click Invitation Detail'. Below the progress bar, there are sections for 'Invitation Details', 'Personalized Message', 'Initiator Fields', and 'Approval History'.

Field	Value
Initiator:	TTUHSC Vendor Approver (ttupw2023+tuhsccapprover@gmail.com)
Vendor Name:	Company Inc.
Contact E-mail:	ttupw2023+companyinc@gmail.com
Initiated:	04/16/2024
Email Sent:	04/16/2024
Invitation Reminders:	Enabled

Personalized Message
Test message

Initiator Fields:
Description of Goods and Services: Good Goods
Initiator Name (first and last): Hayden Vest
Initiator Email: hayden.vest@ttuhsc.edu
Initiator Department: TTUHSC Procurement
Initiator Phone Number: 8067432225
Reason for inviting this supplier: Product and Service

Approval History:
Apr 16, 2024 8:22 AM: Approved by Procurement <ttupw2023+procurement@gmail.com> (Procurement)
Message: Approval note

Resend Invitations

An invitation may be re-sent if the wrong Contact E-mail address was originally entered. An invitation may only be re-sent with a status of Sent, Delivered or Not Delivered. The Personalized Message may be updated if needed, if not, the original message will be included in the invitation being re-sent to the vendor.

Click **Resend Invitation**.

NOTE: Once a vendor opens the e-mail, the option to Resend Invitation (as well as cancel reminders) is not available.

An invitation may only be updated or edited by the initiator of the invitation.

PaymentWorks – Vendor Invitations Training

The screenshot displays the PaymentWorks interface for managing vendor invitations. The main section shows the onboarding progress for 'TESTHSC'. The progress bar indicates two steps: 'INVITATION INITIATED' (04/18/2024 2:18 PM) and 'INVITATION EMAIL OPENED' (04/22/2024 9:46 AM). Below the progress bar, the 'Invitation Details' section provides information about the initiator (Shannon Myers), vendor name (TESTHSC), contact email (shannon.myers@ttu.edu), and initiation date (04/18/2024). A 'Personalized Message' section contains a welcome message from TTUHSC. The 'Initiator Fields' section lists details such as the initiator's name, email, department, and phone number. The 'Approval History' section shows an approval from Procurement on 04/22/2024. At the bottom right, there are three buttons: 'Cancel Invitation', 'Disable Reminders', and 'Resend Invitation'. A blue callout box with the text 'Click Resend Invitation' and a downward arrow points to the 'Resend Invitation' button.

Cancel Invitations

The ability to cancel invitations allows you to avoid onboarding payees that are no longer needed and to reuse payee e-mail addresses. Cancelling an invitation will deactivate the invitation link that the vendor had received, preventing their ability to register.

Cancel Invitations should only be used to stop the invitation process as long as the registration has not been submitted by the vendor. Invitees can cancel invitations by clicking the **Cancel Invitation** button in the details view of an Onboarding record.

PaymentWorks – Vendor Invitations Training

The screenshot shows the PaymentWorks interface for managing vendor invitations. The main content area displays the 'Onboardings' section for vendor 'TESTHSC'. A progress bar indicates the status of the invitation: 'INVITATION INITIATED' (04/18/2024 2:18 PM), 'INVITATION PENDING APPROVAL' (04/18/2024 2:18 PM, 19 hours), and 'INVITATION DETAIL'. Below the progress bar, there is a table with 'Invitation Details' and a 'Personalized Message' section. A blue button labeled 'Click Cancel Invitation' points to a red button labeled 'Cancel Invitation'.

Click **Ok** when asked “Are you sure you want to proceed?” to continue with the deletion process.

The screenshot shows a confirmation dialog box overlaid on the PaymentWorks interface. The dialog box contains a warning icon and the text: "You are about to cancel this invitation. This invitation cannot be restored, but you will be able to send a new invitation to the vendor. Would you like to proceed?". There are two buttons: "Cancel" and "Ok". A blue arrow points from the "Click Ok" label to the "Ok" button.

A cancelled invitation shows a status of Cancelled. By default, cancelled invitations are not displayed in PaymentWorks, but users can adjust the filter options checking “Show Cancelled Only” to display all cancelled invitations in a search. Cancelling an invitation automatically disables reminders as well.

Customers are not able to delete invitations through their PaymentWorks account. PaymentWorks will no longer delete invitations as it can cause problems with the deleted data. PaymentWorks has updated the Cancel Invitation feature so there are no

PaymentWorks – Vendor Invitations Training

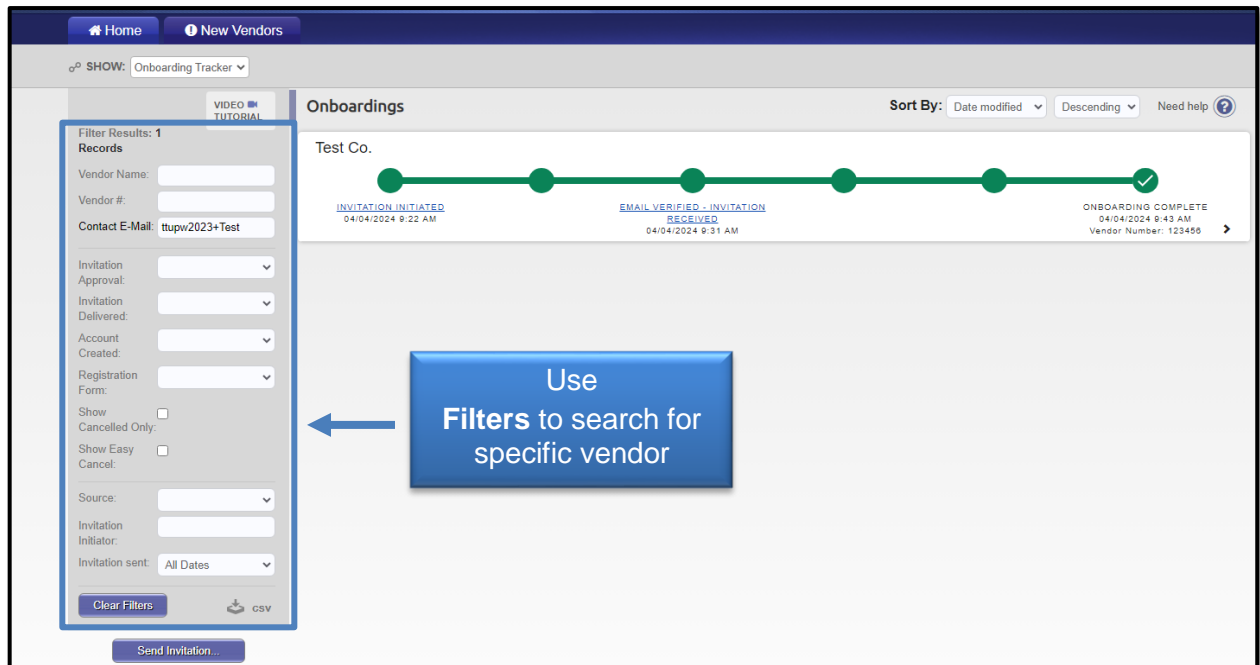
longer issues with deleted data. It is requested that all claimed and unclaimed invitations be cancelled by the customer.

Tracking Invitations

All invitations may be viewed in Onboardings to monitor the statuses toward completion.



Filter Results on the side bar may be used to search for a specific vendor as in this example. Some of the search parameters include: vendor name, vendor number, contact email, status of invitation, status of registration form, and date invitation sent.



NOTE: A vendor must create a PaymentWorks account as well as submit a New Vendor Registration. A vendor is not fully onboarded with TTUHSC until there is a status of **Complete** in the New Vendor Registration column.

Onboarding Statuses

Invitation Column – Clicking a link in this column will display the invitation information as entered by the initiator.

- Sent – The invitation was sent to the email address included in the invitation. The invitation may need to be re-sent if this status does not change to Opened. Confirm the email address or enter a new email address to resend invitation.
- Delivered – The invitation was delivered to the vendor's email; however, the recipient has not opened the email. If it remains in this status for long, the vendor may need to check their spam/junk folder.
- Not Delivered – The vendor's email server rejected the invitation. This status is rare. It may be necessary to try a different email address or have the vendor's IT department make the appropriate changes to allow PaymentWorks to go through their server.
- Opened – The vendor has opened the email, but they have not yet clicked the link to begin the onboarding process.
- Clicked – The vendor opened the email and followed the link to PaymentWorks to create a PaymentWorks account. Note: Once a vendor clicks an invitation, you can no longer re-send the invitation.
- Cancelled – Initiator has clicked the Cancel Invitation link for that vendor.

Vendor Account Column

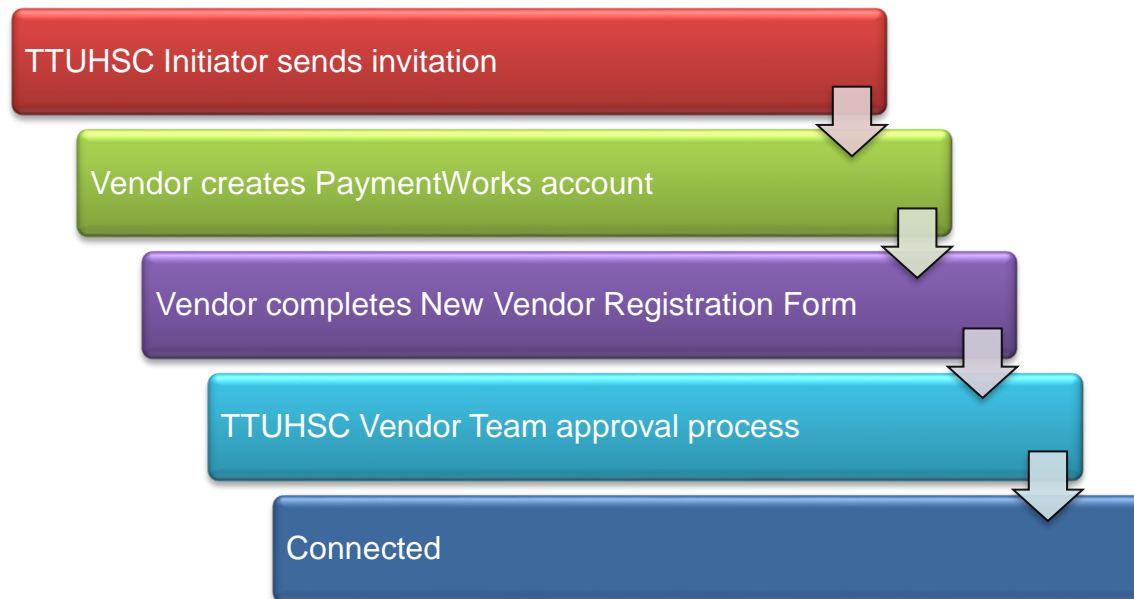
- No Account – The vendor has not yet set up a PaymentWorks account.
- Registered – The vendor has created their PaymentWorks account. Validation email was sent by PaymentWorks.
- Email Validated – The vendor has created their PaymentWorks account, and their email has been validated. Clicking this link will show the details submitted by the vendor.

New Vendor Registration Column

- Not Started – The vendor has not started their new registration form.
- Submitted – The vendor has submitted the registration for review.
- Returned – The registration has been returned to the vendor for correction or clarification.
- Approved – The registration has been approved.
- Processed – The registration has been processed and is awaiting connection with Banner.
- Complete – The Banner connection was successful and the Banner R# is displayed.
- Rejected – The Vendor Team has rejected the submitted registration form.


PaymentWorks – Vendor Invitations Training

Onboarding Process Overview



Step 1: TTUHSC Initiator Sends Invitation

The TTUHSC end-user will initiate an invitation in PaymentWorks to a vendor who will be requiring payment. The invitation will include a link that prompts the vendor to connect via PaymentWorks. An example of the invitation is below.



PaymentWorks
TEXAS TECH UNIVERSITY SYSTEM

Dear TESTHSC:

Shannon Myers has invited you to register as a new vendor to Texas Tech University (Test).

TTUHSC has partnered with PaymentWorks for our online vendor solution which is free to you the vendor. It adds fraud protection, invoice payment status, and ease of vendor information management. S.Myers from FSM invites you to PaymentWorks at TTUHSC.

In order for Texas Tech University (Test) to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Texas Tech University (Test)'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 Texas Tech University

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

Thank you for your support.

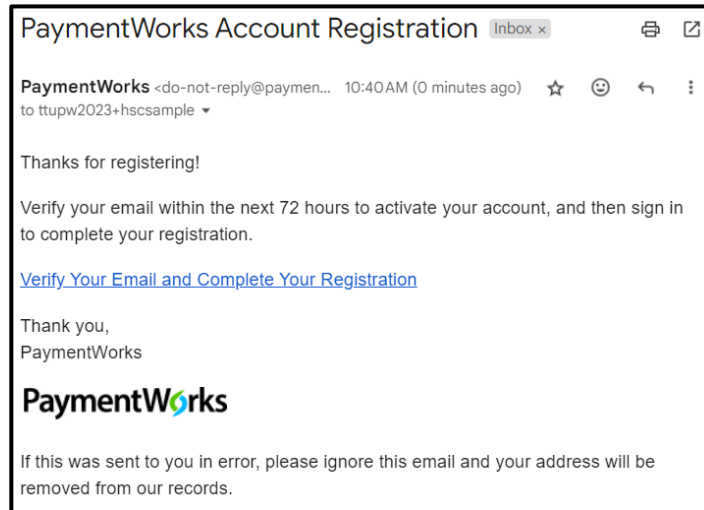
Sincerely,

Texas Tech University

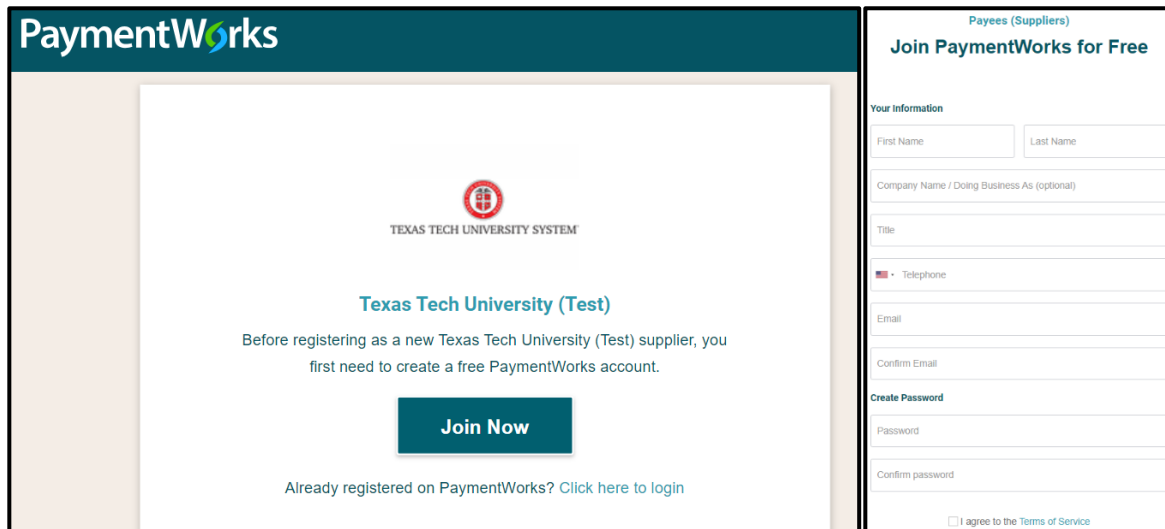
PaymentWorks – Vendor Invitations Training

Step 2: Vendor Creates PaymentWorks Account

From the emailed invitation, the vendor will be prompted to join PaymentWorks. The vendor will then receive a separate email to verify their account. A vendor cannot access their account if they do not verify their e-mail.



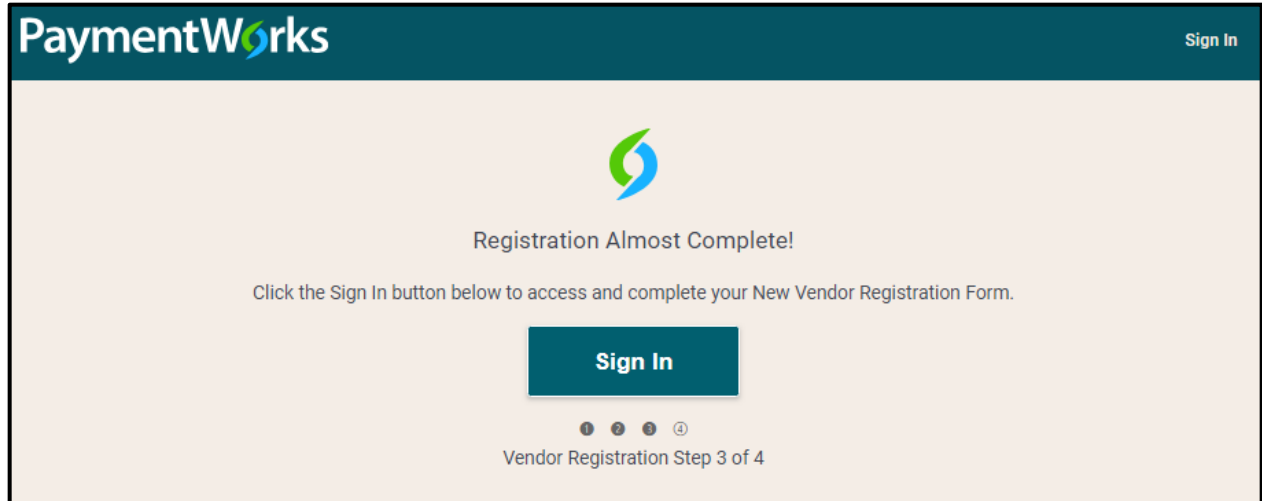
Vendors with an existing PaymentWorks account will be prompted to connect with TTUHSC after logging into PaymentWorks.



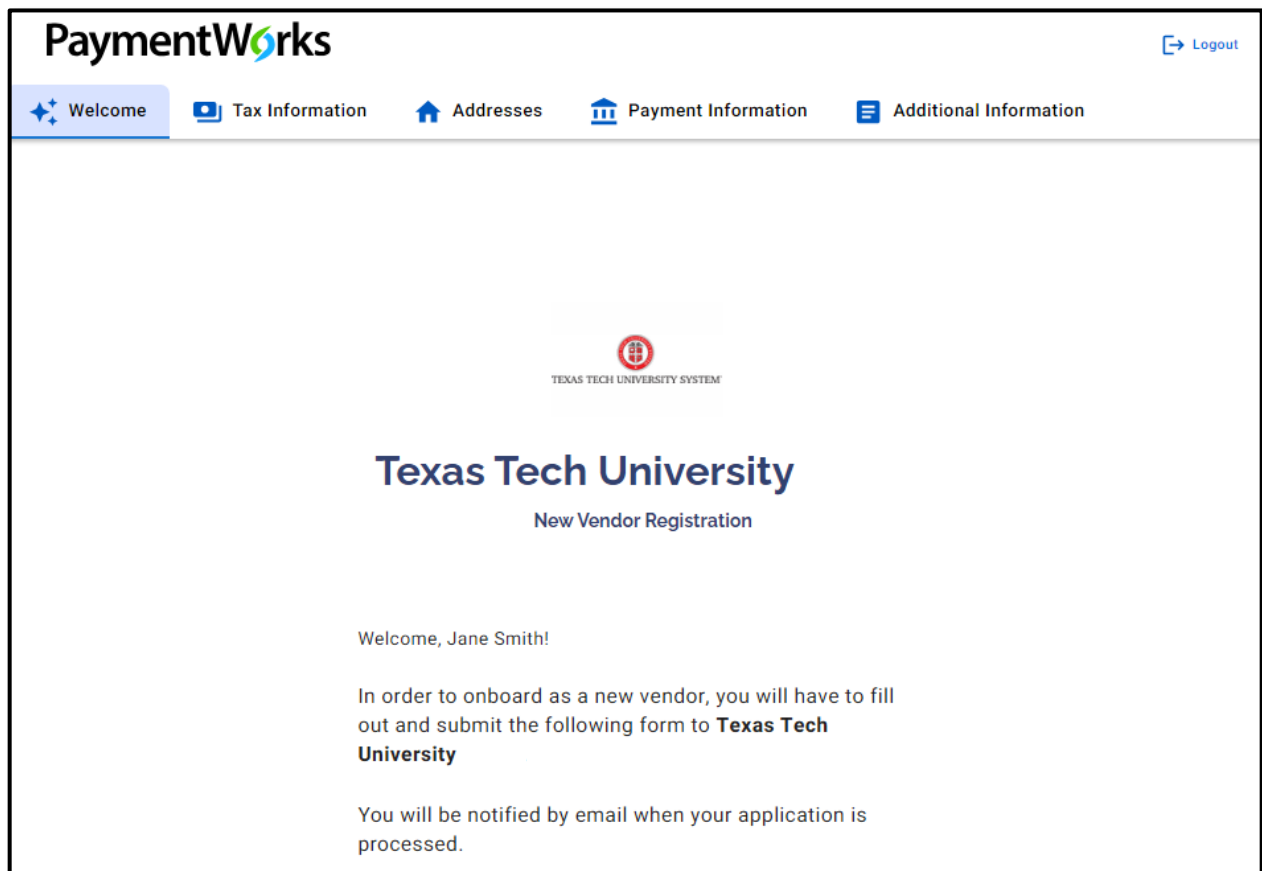
Step 3: Vendor Completes New Vendor Registration Form

After the vendor has joined PaymentWorks and verified their account, the first log in will prompt them to complete the New Vendor Registration Form.

PaymentWorks – Vendor Invitations Training



This form allows vendors to provide their business profile information, including their address, their tax information such as EIN (for businesses) or SSN (for individuals), a W9 form (or similar for international vendors), and choose their preferred payment method and submit direct deposit information.



Step 4: TTUHSC Vendor Team Approval Process

Once the New Vendor Registration Form has been submitted by the vendor, the TTUHSC Vendor Team will review the information that has been submitted and take the appropriate action to connect the vendor to TTUHSC.

Step 5: Connected

Once approved by the TTUHSC Vendor Team, the vendor connection in PaymentWorks will be complete and the data will be interfaced with Banner with an R# given.

Visit the [Help Center](#) within PaymentWorks for training videos and additional help documents related to the Vendor Invitation and Status topic.

If you have additional questions, please contact the Vendor Team at vendorteam@ttuhsc.edu.