PaymentWorks Vendor Setup & Maintenance Training

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER™

Training Objectives

- To present PaymentWorks as a vendor setup and maintenance platform for TTUHSC
  - Getting vendors set up with a PaymentWorks account
  - 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 <u>NOT</u> 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
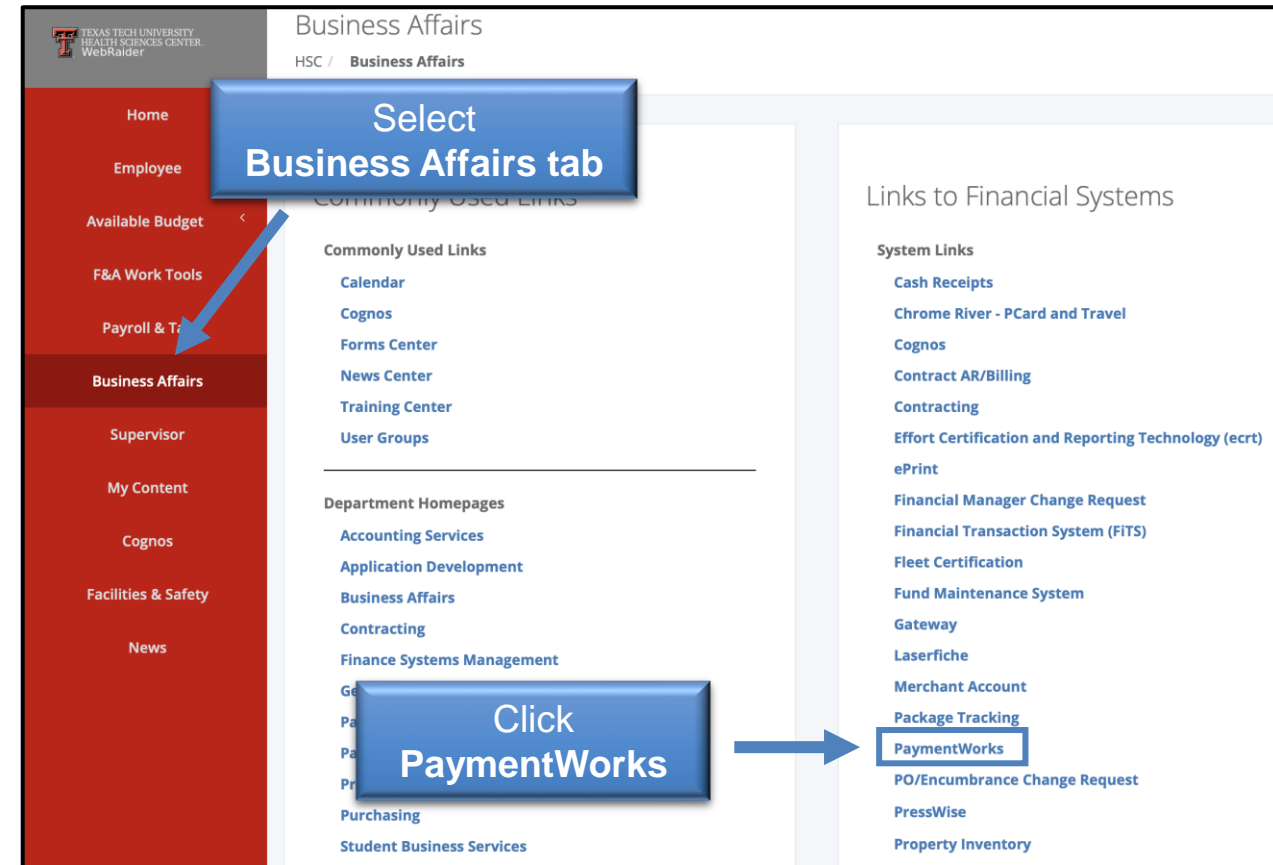
PaymentWorks

- 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

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

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

Note: Logging into this system requires
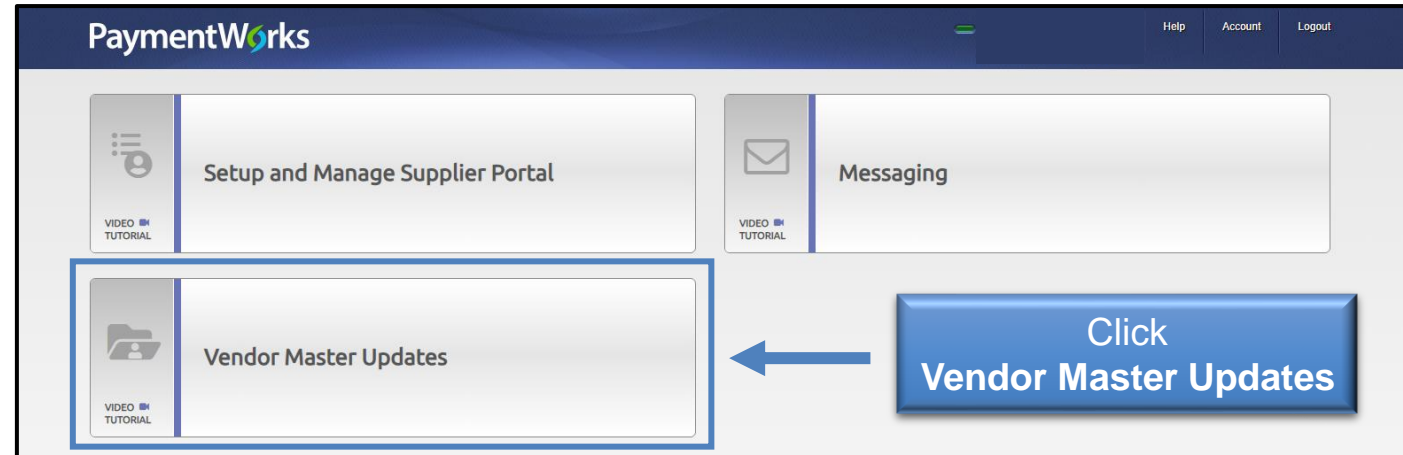 two-factor Authentication.

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.

PaymentWorks

Setup and Manage Supplier Portal		Messaging	

Vendor Master Updates

Click **Vendor Master Updates**

PaymentWorks — Vendor Master Updates

Home | Vendor Profiles | Updates | New Vendors

SHOW: Onboarding Tr...

Click **New Vendors Tab**

Search for a Vendor/Payee

A full repository of all invitations sent by users in your PaymentWorks will display.
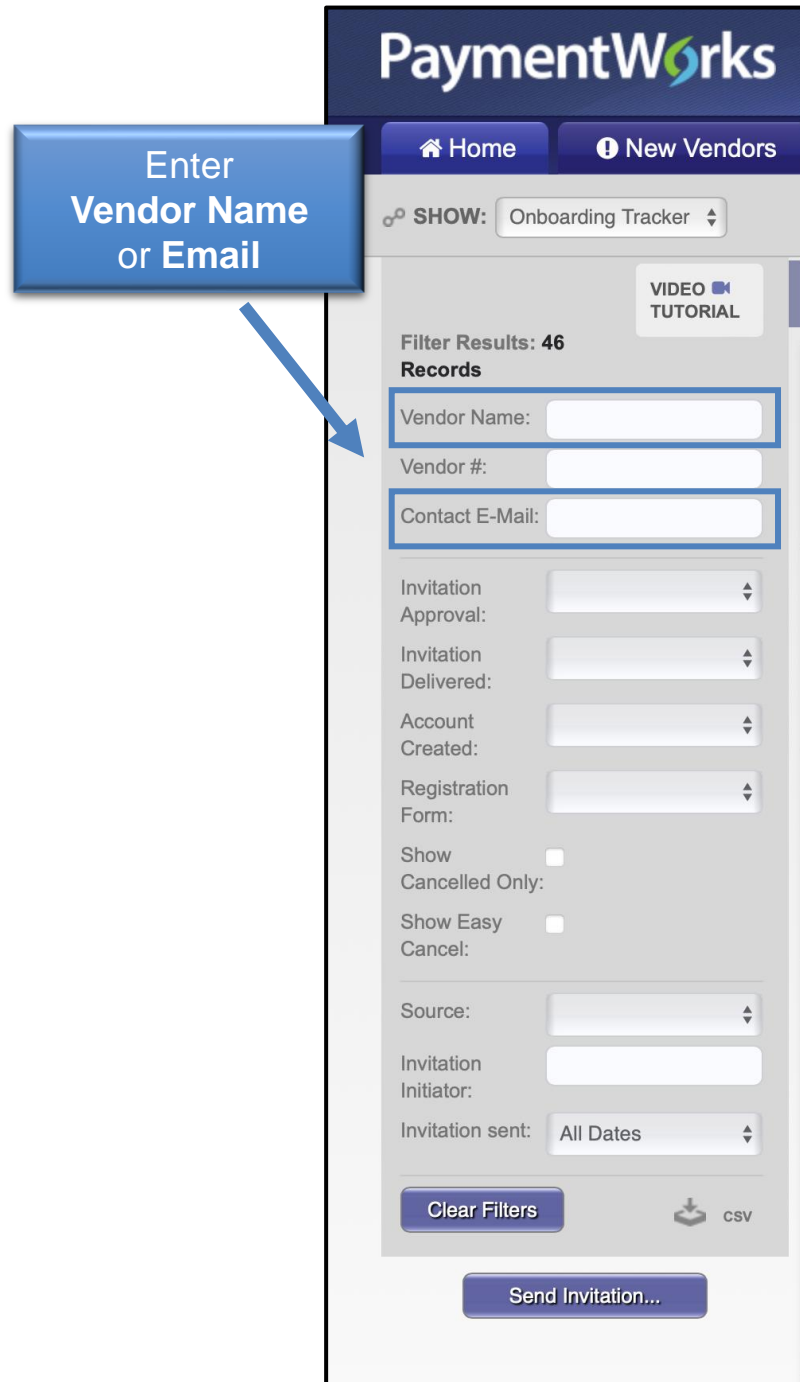
Search for a Vendor/Payee

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.

PaymentWorks

Enter **Vendor Name** or **Email**

🏠 Home | ❶ New Vendors

🔗 SHOW: Onboarding Tracker ⬍

VIDEO 🎥 TUTORIAL

Filter Results: 46 Records

Vendor Name:
Vendor #:
Contact E-Mail:

Invitation Approval: ⬍
Invitation Delivered: ⬍
Account Created: ⬍
Registration Form: ⬍
Show Cancelled Only: ☐
Show Easy Cancel: ☐

Source: ⬍
Invitation Initiator:
Invitation sent: All Dates ⬍

Clear Filters   ⬇ CSV

Send Invitation...

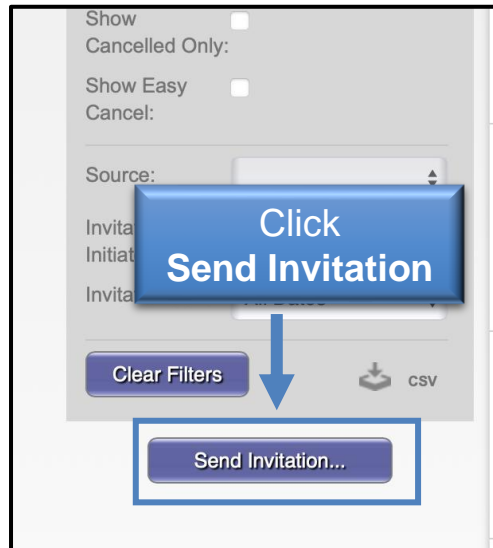# Inviting a Vendor/Payee

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.

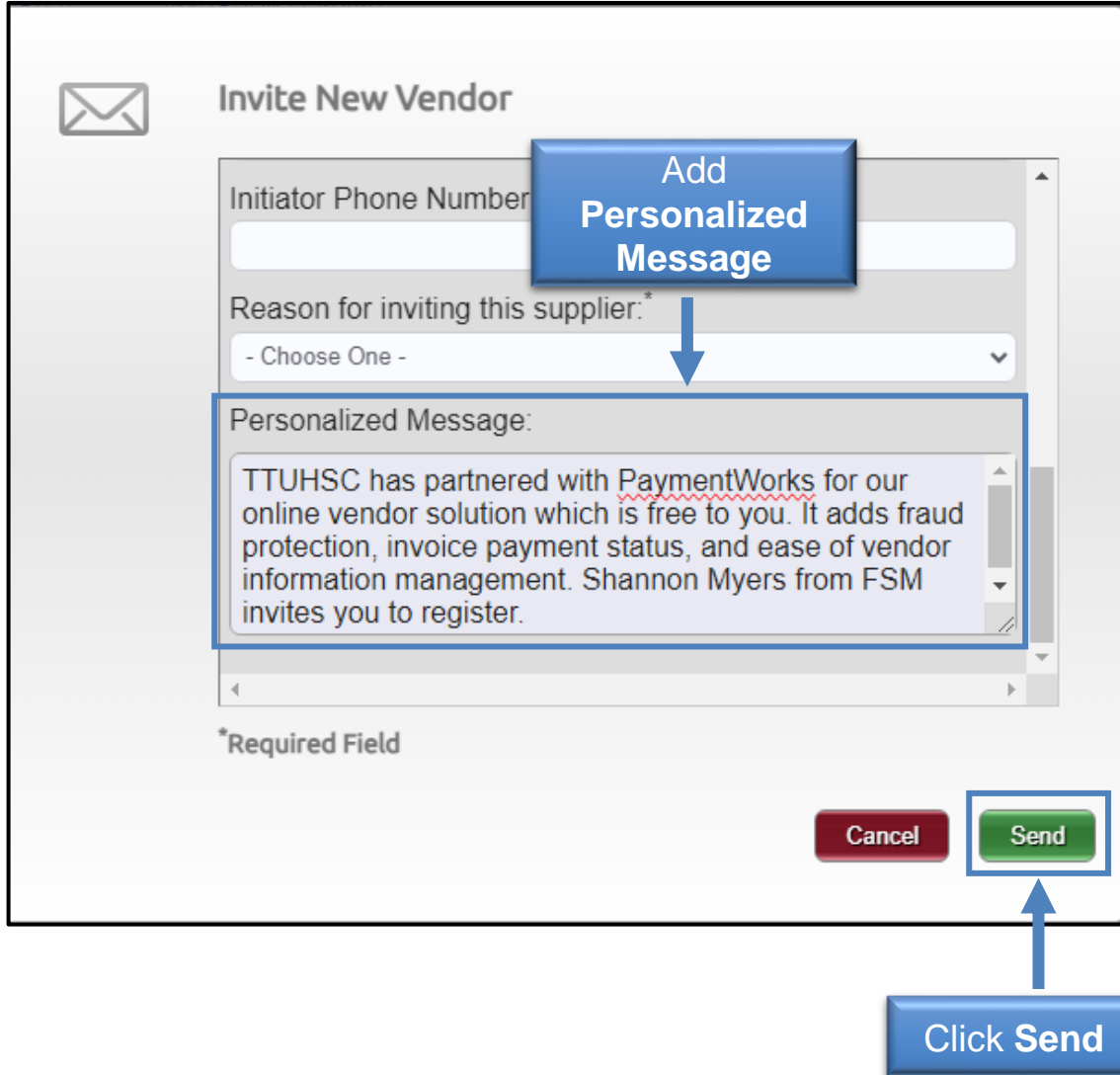<u>**Note**</u>: Anything marked with an asterisk is required.

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. **"Insert Department contact name"** from **"Insert Department Name"** 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

Invitation Approval
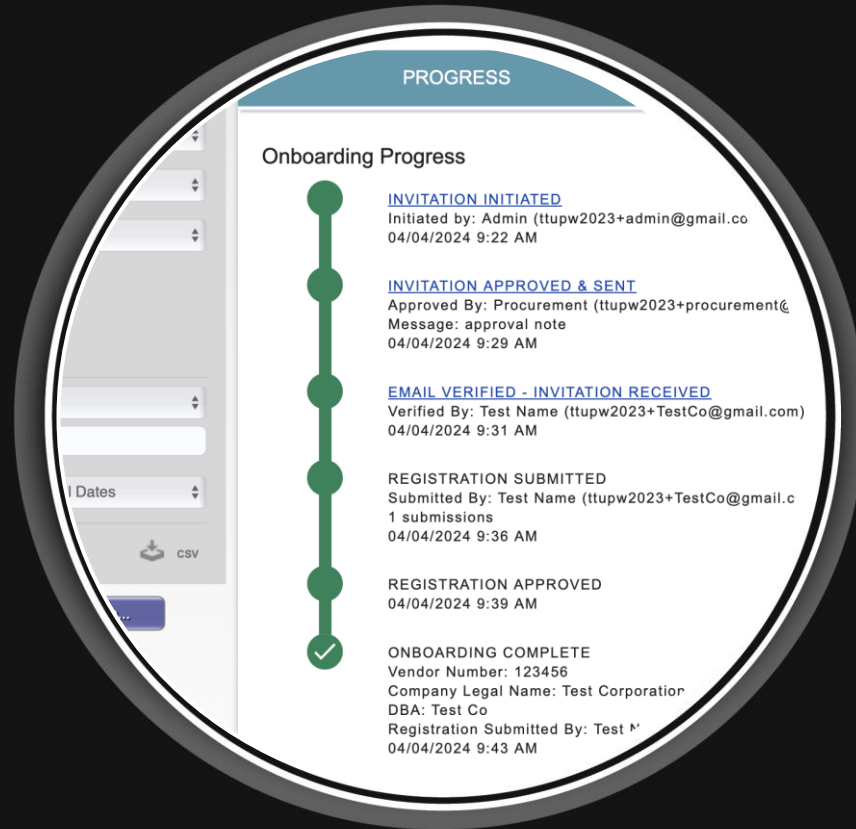
Status Displayed	Definition
Invitation Initiated	Initiator sent an invitation
Invitation Rejected	The Vendor Team has rejected the submitted registration form
Invitation Cancelled	Invitation was cancelled by the initiator or another payer user

Onboarding Statuses

Invitation Approval

Status Displayed	Definition
Invitation Pending Approval	Invitation is awaiting approval from another payer user
Invitation Approved & Sent	Invitation was approved by TTUHSC and was emailed to the payee

Onboarding Statuses

Invitation Receipt

Status Displayed	Definition
Invitation Email Opened	Vendor/Payee opened the email invitation
Invitation Link Clicked	Vendor clicked the link in the email invitation to register with PaymentWorks
Email Verified – Invitation Received	Vendor set up an account with PaymentWorks and verified their email address

Onboarding Statuses

Registration Submission

Status Displayed	Definition
Registration in Progress (no NVR yet)	Initiator sent an invitation
Registration Returned – Pending Resubmission	Vendor's NVR was returned, and the vendor needs to make changes and resubmit the NVR
Registration Submitted	Vendor completed and submitted their registration form for review

Onboarding Statuses

Registration Approval Part 1

Status Displayed	Definition
Registration Submitted – Pending PaymentWorks Review	PaymentWorks is reviewing the vendor's banking information
Registration Submitted – Pending Payee Response	PaymentWorks called the vendor and left a message, and the vendor needs to return the phone call
Registration Submitted – Pending Internal Review	PaymentWorks reviewed the bank account, and the registration is now waiting for internal review from the Vendor Team
Registration Resubmitted – Pending PaymentWorks Review	Vendor completed and re-submitted their registration form. PaymentWorks is reviewing the vendor's banking information

Onboarding Statuses

Registration Approval Part 2

| Status Displayed	Definition
Registration Resubmitted – Pending Payee Response	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
Registration Resubmitted – Pending Internal Review	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
Registration Rejected	New vendor registration form was reviewed and rejected by the Vendor Team
Registration Approved	New vendor registration form was reviewed and approved by the Vendor Team

Onboarding Statuses

Onboarding Completion

Status Displayed	Definition
Registration Processed	Information from the new vendor registration form was exported for integration into Banner
Invitation Approved & Sent	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

Troubleshooting

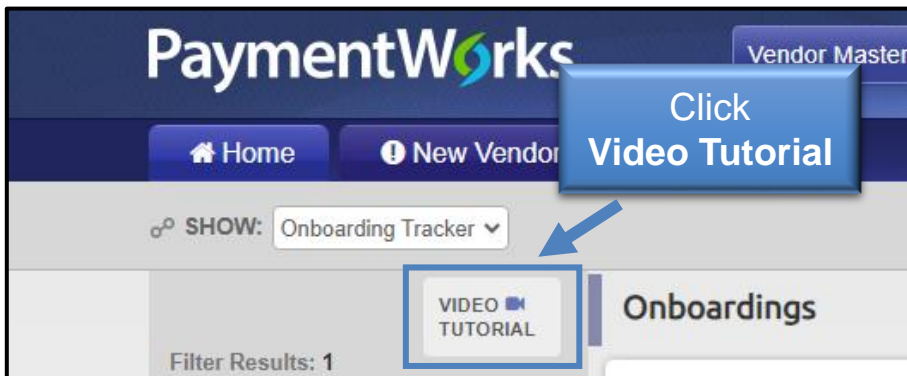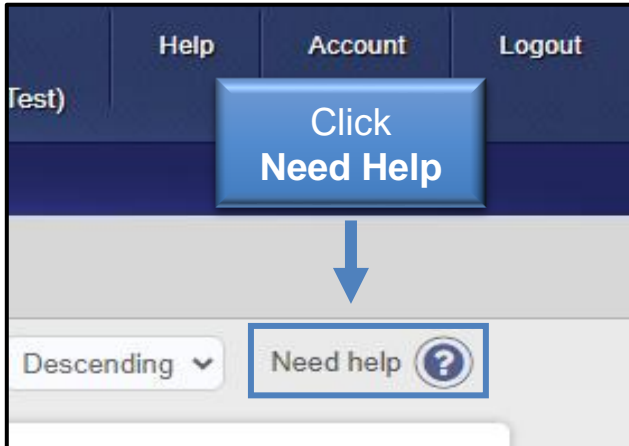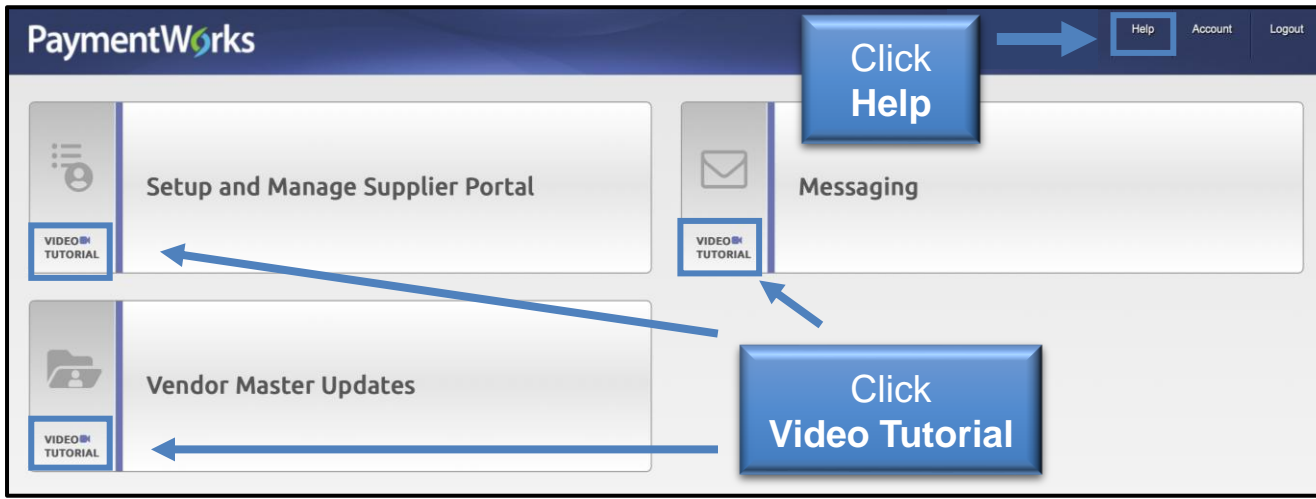- Online Help
- Customer Support
- FAQs
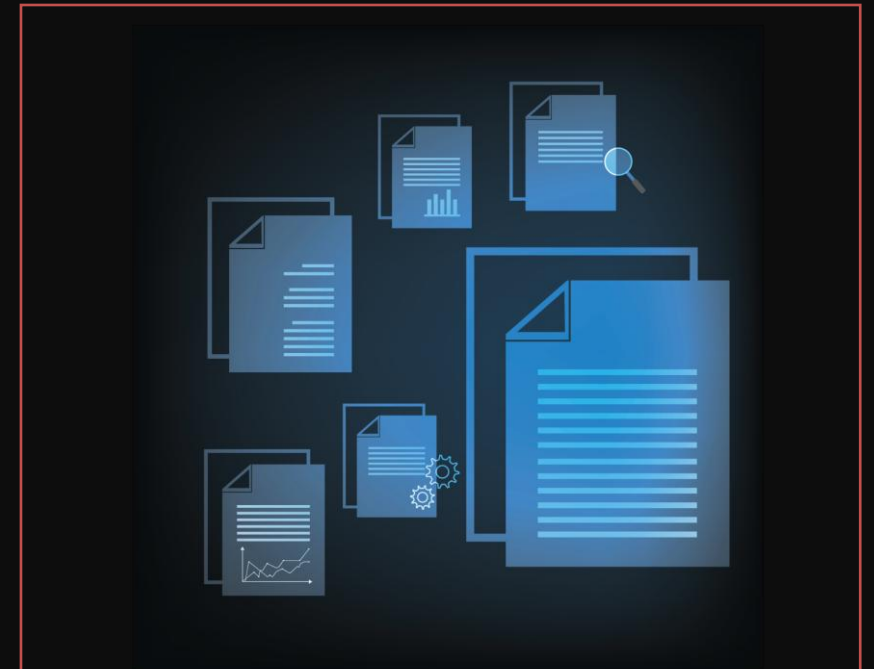
When do I contact PaymentWorks Support versus the TTUHSC Vendor Team Support?

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
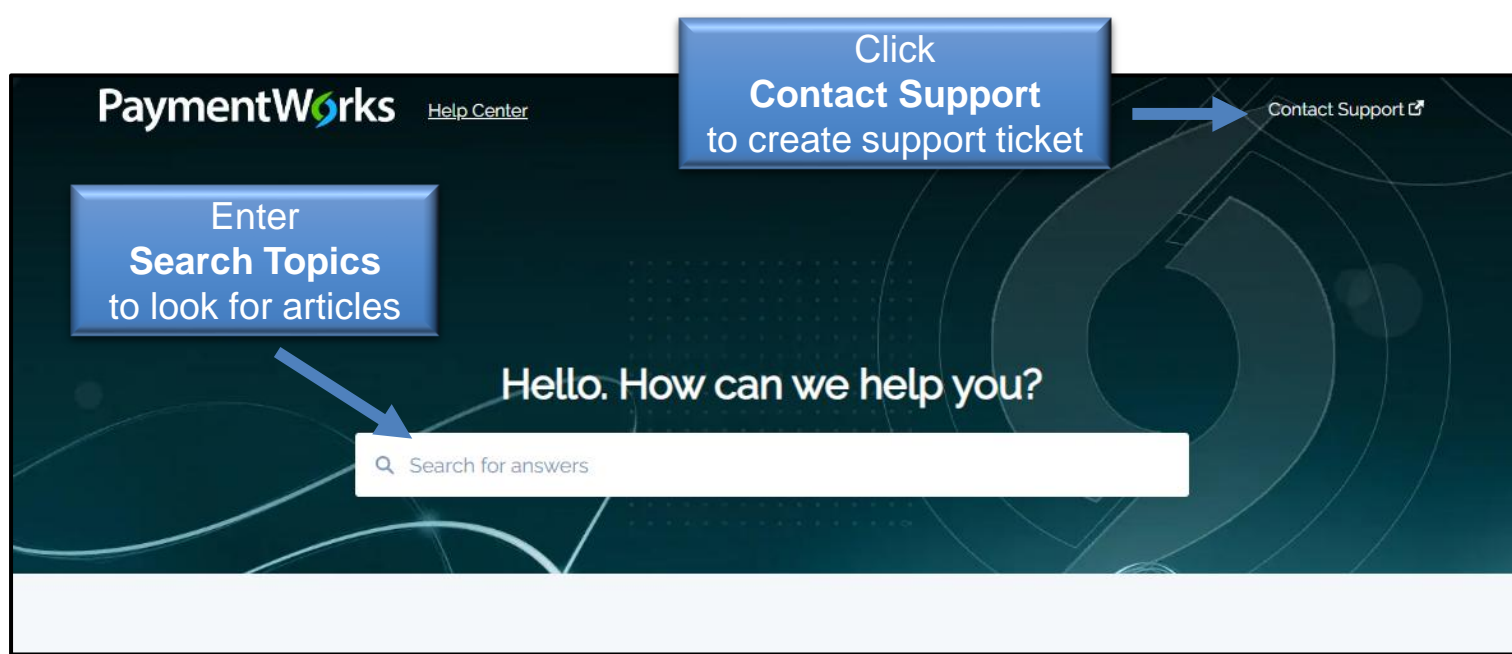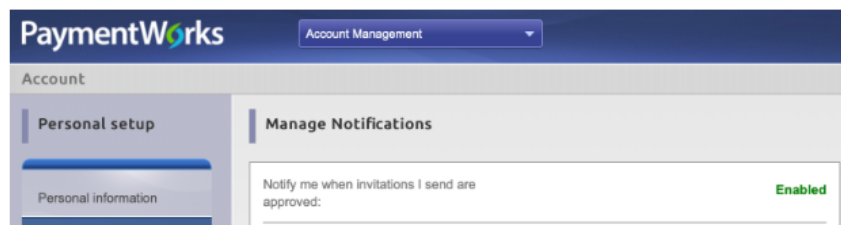
Online Help

- 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

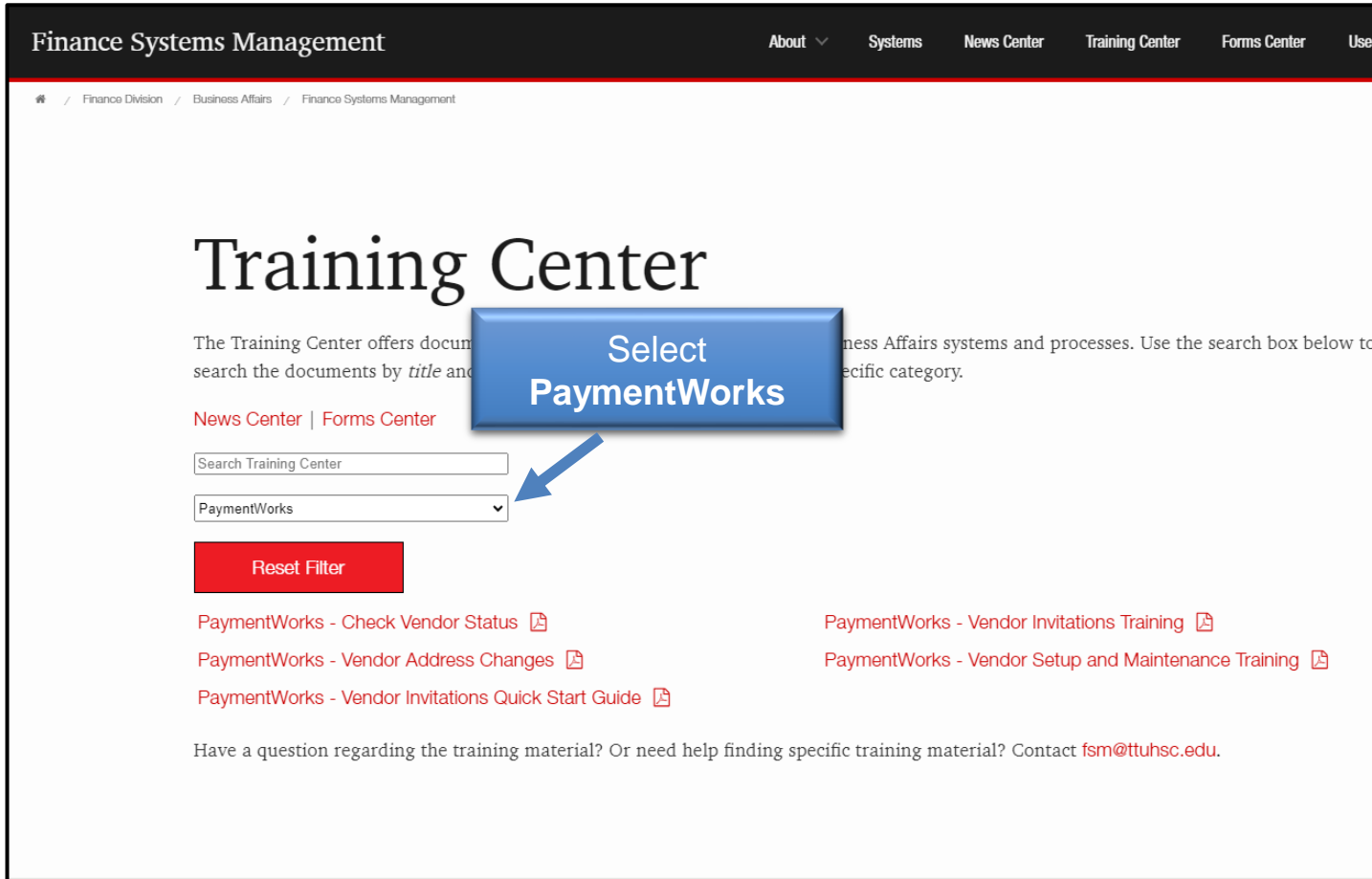- Use the [Training Center](#) for TTUHSC training documentation related to PaymentWorks

- Use the Filter by Category option to select PaymentWorks

Troubleshooting

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.

Enter **Correct Email**

Resend New Vendor Invitatio

Company/Individual Name:*
TESTHSC

Contact E-Mail:*
TestHSC@ttu.edu

Verify Contact E-Mail:*
TestHSC@ttu.edu

Description of Goods and Services:*
Financial and Design Products and Services

Initiator Name (first and last):*
Jane Smith

Click **Send**

*Required Field

Cancel   Send

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.

Onboardings

TESTHSC

INVITATION INITIATED
04/18/2024 2:18 PM

INVITATION PENDING
APPROVAL
04/18/2024 2:18 PM

Click Invitation Status

PROGRESS | INVITATION DETAIL

Invitation Details

Initiator: Shannon Myers (shannon.myers@ttuhsc.edu)
Vendor Name: TESTHSC
Contact E-mail: shannon.myers@ttu.edu
Initiated: 04/18/2024
Invitation Reminders: Enabled

Personalized Message

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.

Initiator Fields:

Description of Goods and Services: Financial and Design Products and Services
Initiator Name (first and last): Shannon Myers
Initiator Email: shannon.myers@ttuhsc.edu
Initiator Department: Finance Systems Management
Initiator Phone Number: 806-743-3594
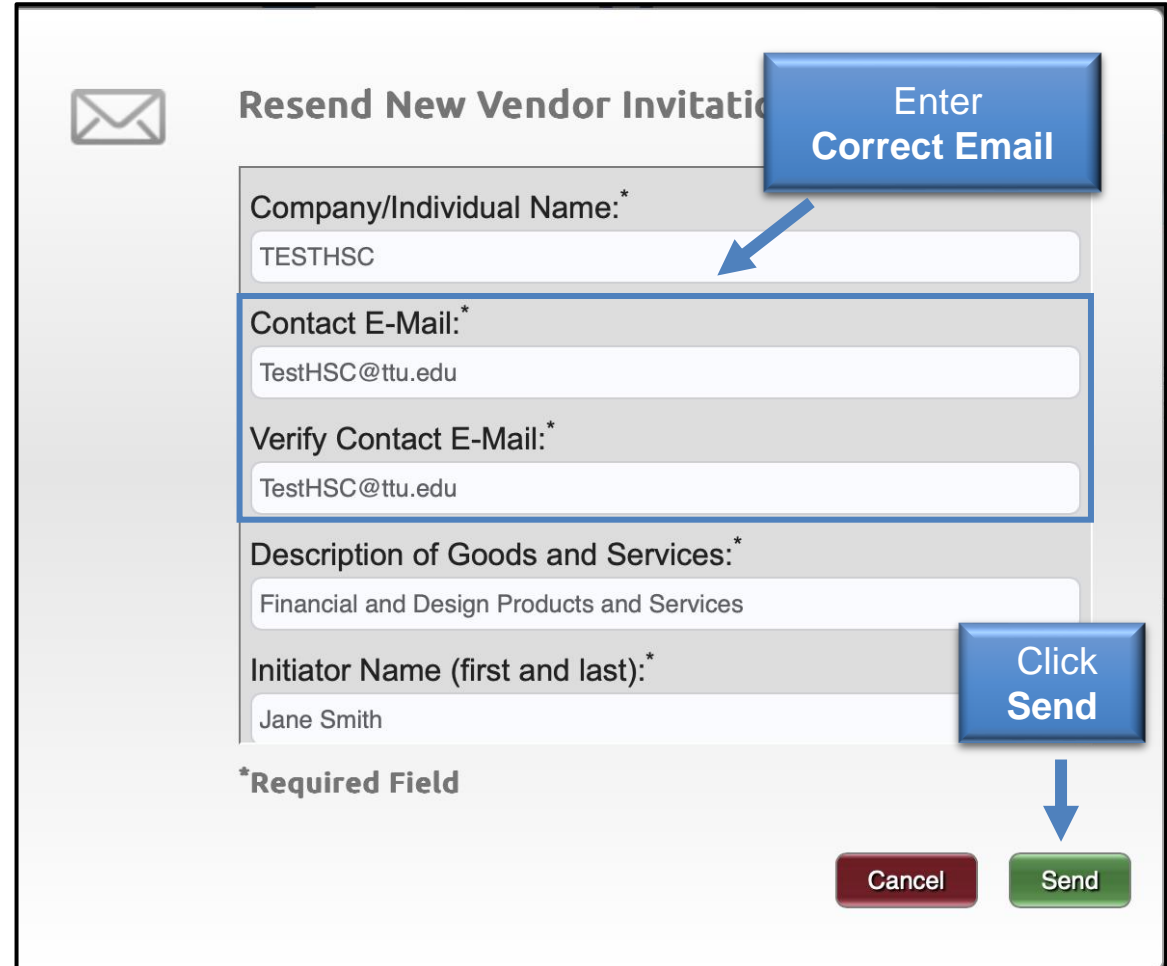**Reason for inviting this supplier:** Product and Service
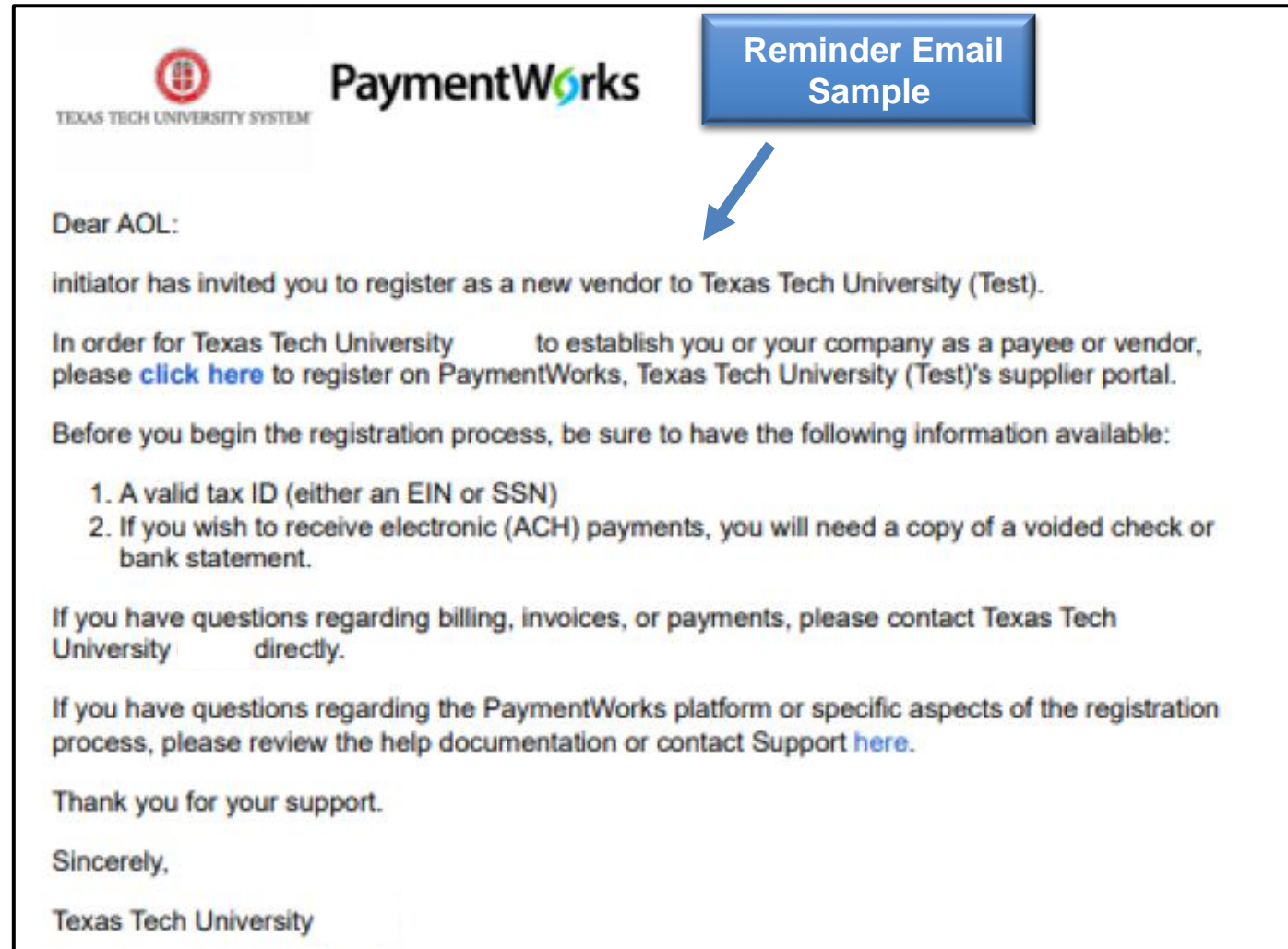
Click Cancel Invitation

Cancel Invitation

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?

Click OK

Cancel | Ok

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**

Reminder Email Sample

TEXAS TECH UNIVERSITY SYSTEM — PaymentWorks

Dear AOL:

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

In order for Texas Tech University 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 directly.

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

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.

Click **Invitation Status**

Click **Disable Reminders**

Contact Information

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