

# PaymentWorks Vendor Setup & Maintenance Training



# 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 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

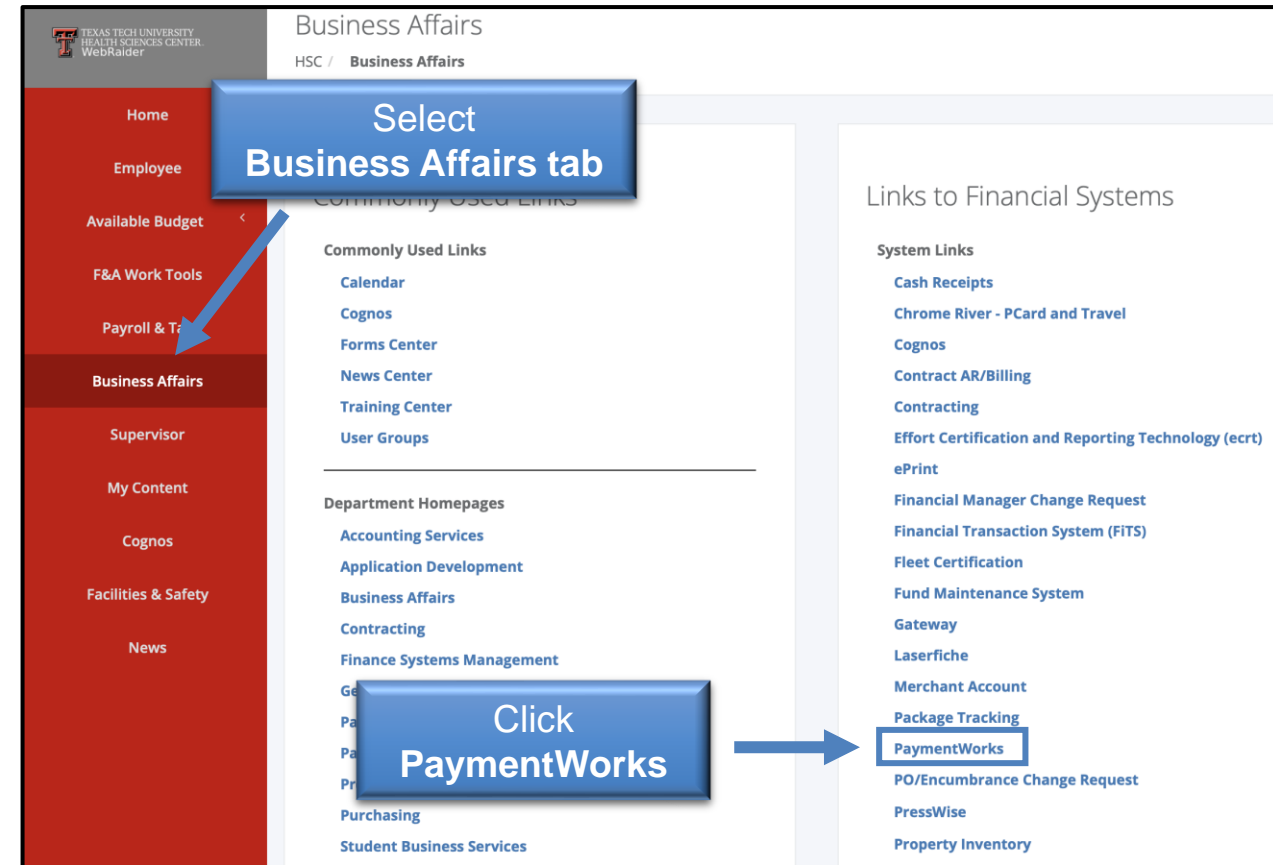
- PaymentWorks is a platform TTUHSC uses to connect financially and securely with its new and existing vendors.
- Approved personnel send an invitation to new vendors so they can create an account and make a connection with HSC through PaymentWorks.
- Invitations should only be sent to vendors when a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

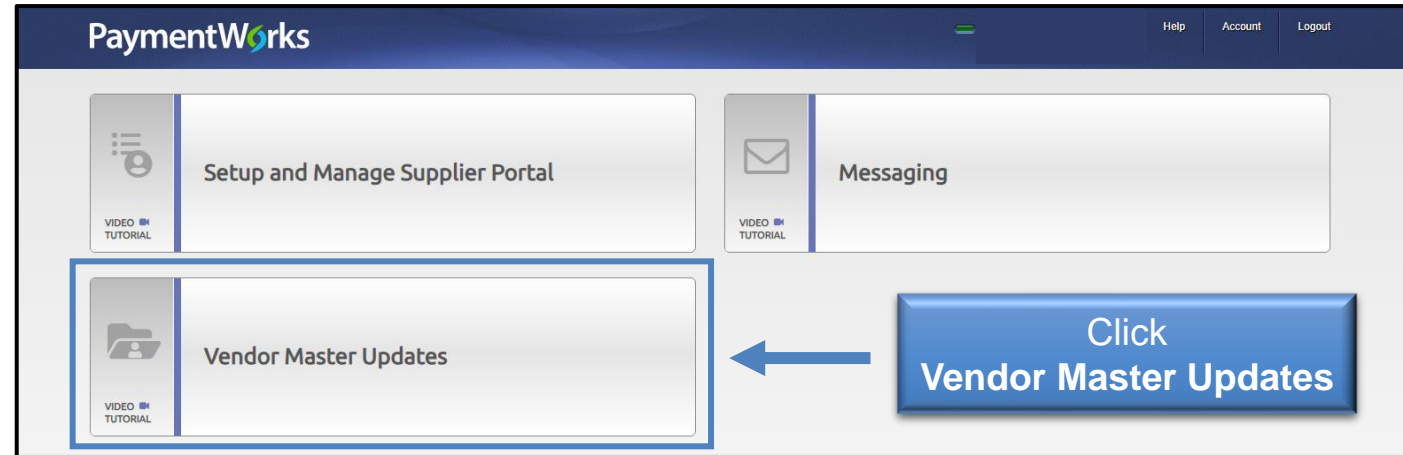
## How to Search

### 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.





# Search for a Vendor/Payee

A full repository of all invitations sent by users in your PaymentWorks will display.

PaymentWorks Vendor Master Updates

Home 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...

### Onboardings

Sort By: Date modified Descending Need help ?

**HSC Sample**

INVITATION INITIATED 04/22/2024 10:32 AM

EMAIL VERIFIED - INVITATION RECEIVED 04/22/2024 10:41 AM

ONBOARDING COMPLETE 04/22/2024 11:20 AM Vendor Number: R11882201

**TESTHSC**

INVITATION INITIATED 04/18/2024 2:18 PM

INVITATION LINK CLICKED 04/22/2024 10:03 AM 1 day and 22 hours

**Circle Catering**

INVITATION INITIATED 04/18/2024 10:33 AM

EMAIL VERIFIED - INVITATION RECEIVED 04/18/2024 10:39 AM

REGISTRATION APPROVED 04/18/2024 11:18 AM

**Avaya**

INVITATION INITIATED 03/27/2024 9:33 AM

INVITATION EMAIL OPENED 04/18/2024 9:51 AM 5 days and 23 hours

**LBA Enterprises LLC**

INVITATION INITIATED 04/17/2024 1:45 PM

EMAIL VERIFIED - INVITATION RECEIVED 04/17/2024 3:52 PM

ONBOARDING COMPLETE 04/18/2024 9:32 AM Vendor Number: R11982254

# Search for a Vendor/Payee

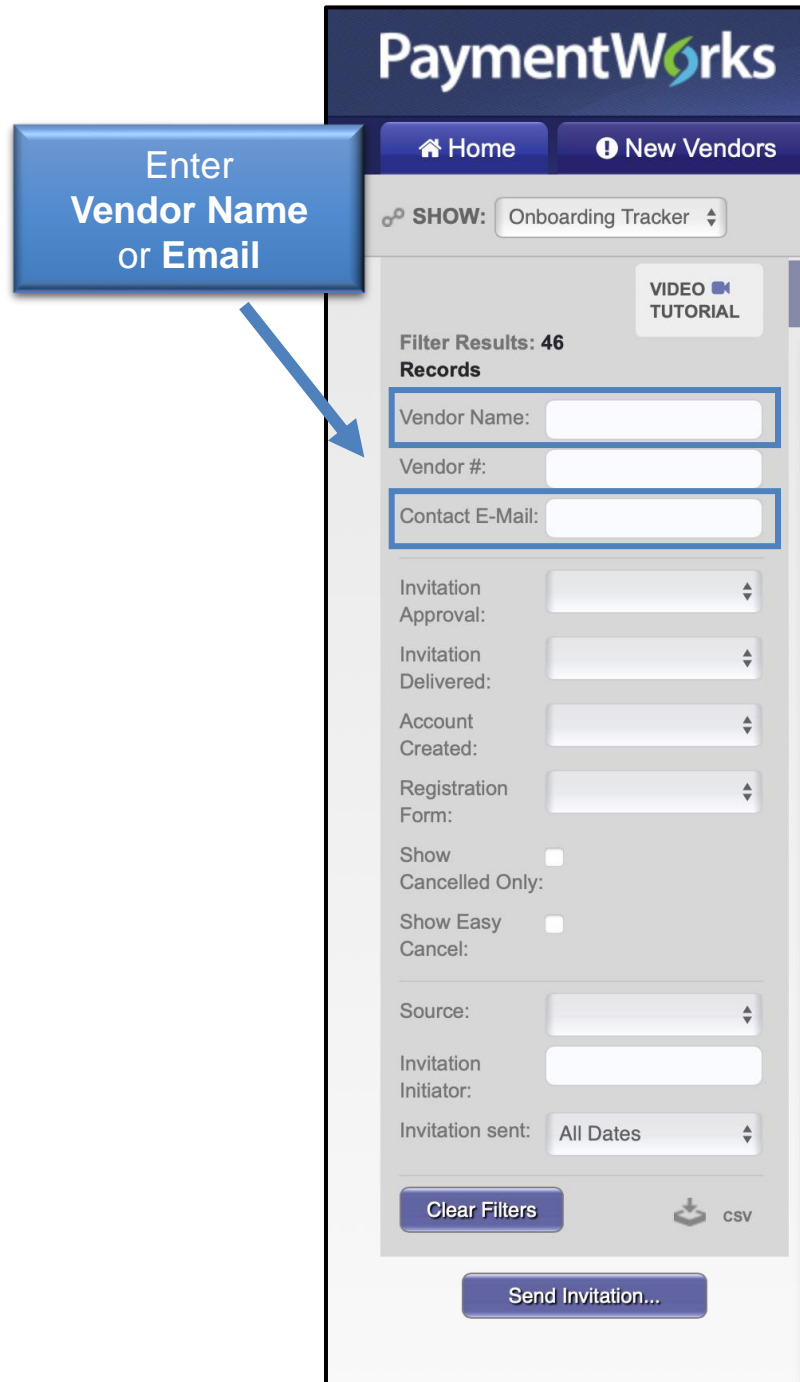
## How to Search

### 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.



The screenshot shows the PaymentWorks interface for adding new vendors. A blue callout box with the text "Enter Vendor Name or Email" has an arrow pointing to the "Vendor Name" search field. The page includes a navigation bar with "Home" and "New Vendors" links, a "SHOW: Onboarding Tracker" dropdown, and a "VIDEO TUTORIAL" button. The "Filter Results: 46 Records" section contains search fields for "Vendor Name", "Vendor #", and "Contact E-Mail", each with a blue border. Below these are various filter dropdowns: "Invitation Approval:", "Invitation Delivered:", "Account Created:", "Registration Form:", "Show Cancelled Only:", "Show Easy Cancel:", "Source:", "Invitation Initiator:", and "Invitation sent: All Dates". At the bottom, there are buttons for "Clear Filters", a "csv" download icon, and "Send Invitation...".

PaymentWorks

Home 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

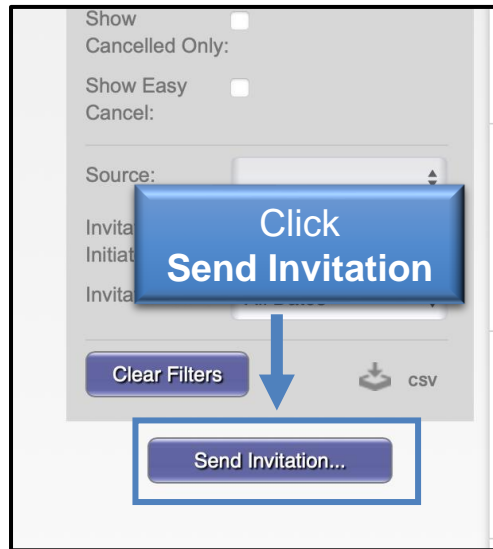
### Step 1:

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

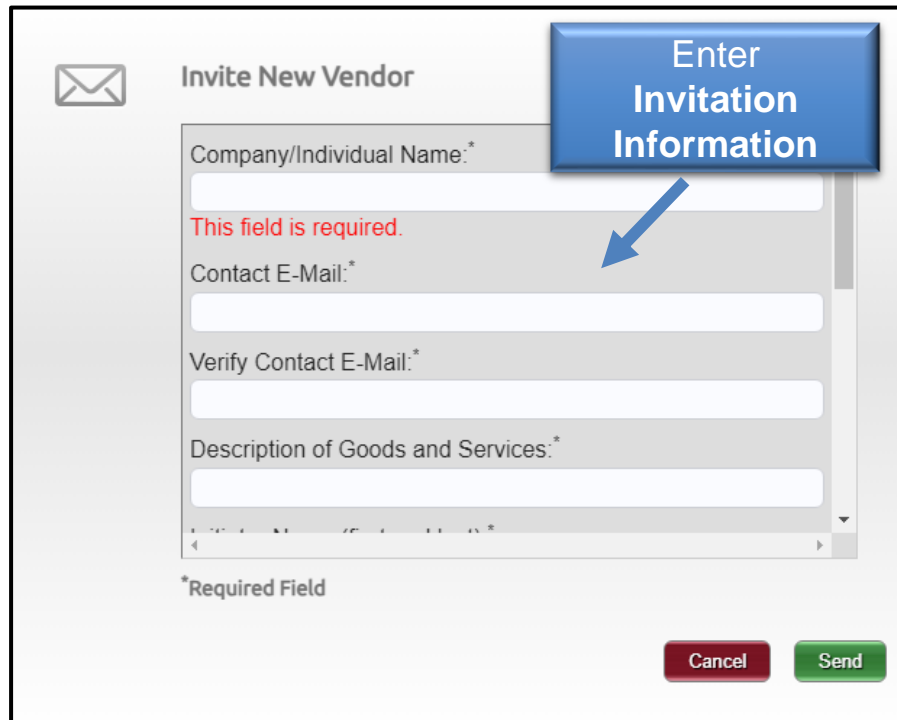
### Step 2:

Fill out the invitation information.

**Note:** Anything marked with an asterisk is required.



This screenshot shows the 'New Vendors' filter section. At the top, there are checkboxes for 'Show Cancelled Only' and 'Show Easy Cancel'. Below these is a 'Source' dropdown menu. A blue box with the text 'Click Send Invitation' and a downward arrow points to the 'Send Invitation...' button at the bottom of the filter section. The button is highlighted with a blue border.

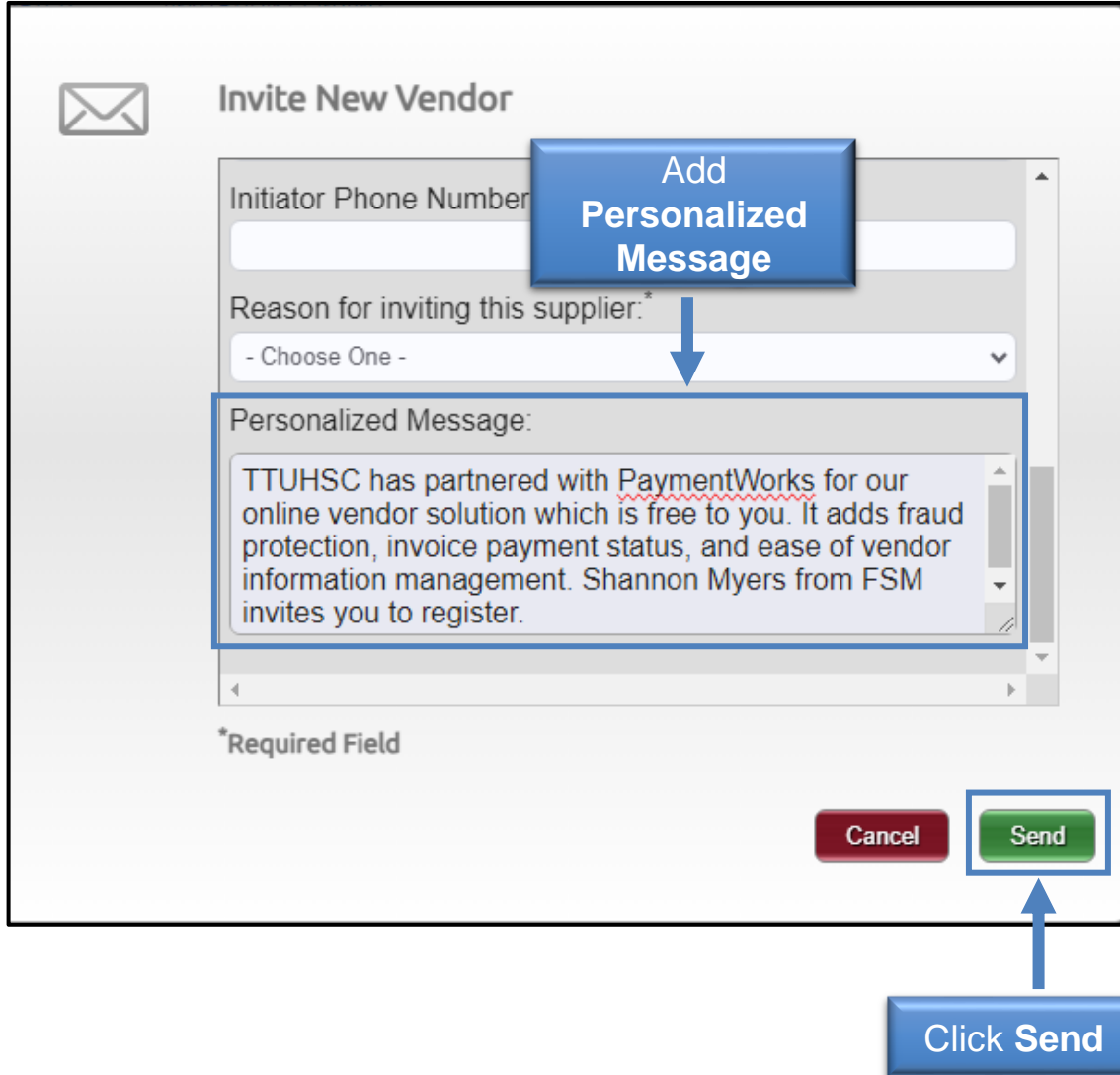


This screenshot shows the 'Invite New Vendor' form. It has a title 'Invite New Vendor' with an envelope icon. The form contains several required fields marked with an asterisk: 'Company/Individual Name.\*', 'Contact E-Mail.\*', 'Verify Contact E-Mail.\*', and 'Description of Goods and Services.\*'. A red error message 'This field is required.' is visible next to the 'Company/Individual Name' field. A blue box with the text 'Enter Invitation Information' and a downward arrow points to the 'Company/Individual Name' field. At the bottom, there are 'Cancel' and 'Send' buttons. A legend at the bottom left indicates '\*Required Field'.

# 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.



The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form includes the following fields and elements:

- Initiator Phone Number:** A text input field.
- Reason for inviting this supplier:\*** A dropdown menu currently showing "- Choose One -".
- Personalized Message:** A text area containing the template text: "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." The text "PaymentWorks" is underlined in red.
- \*Required Field:** A label at the bottom left of the form.
- Buttons:** "Cancel" (red) and "Send" (green) buttons at the bottom right.

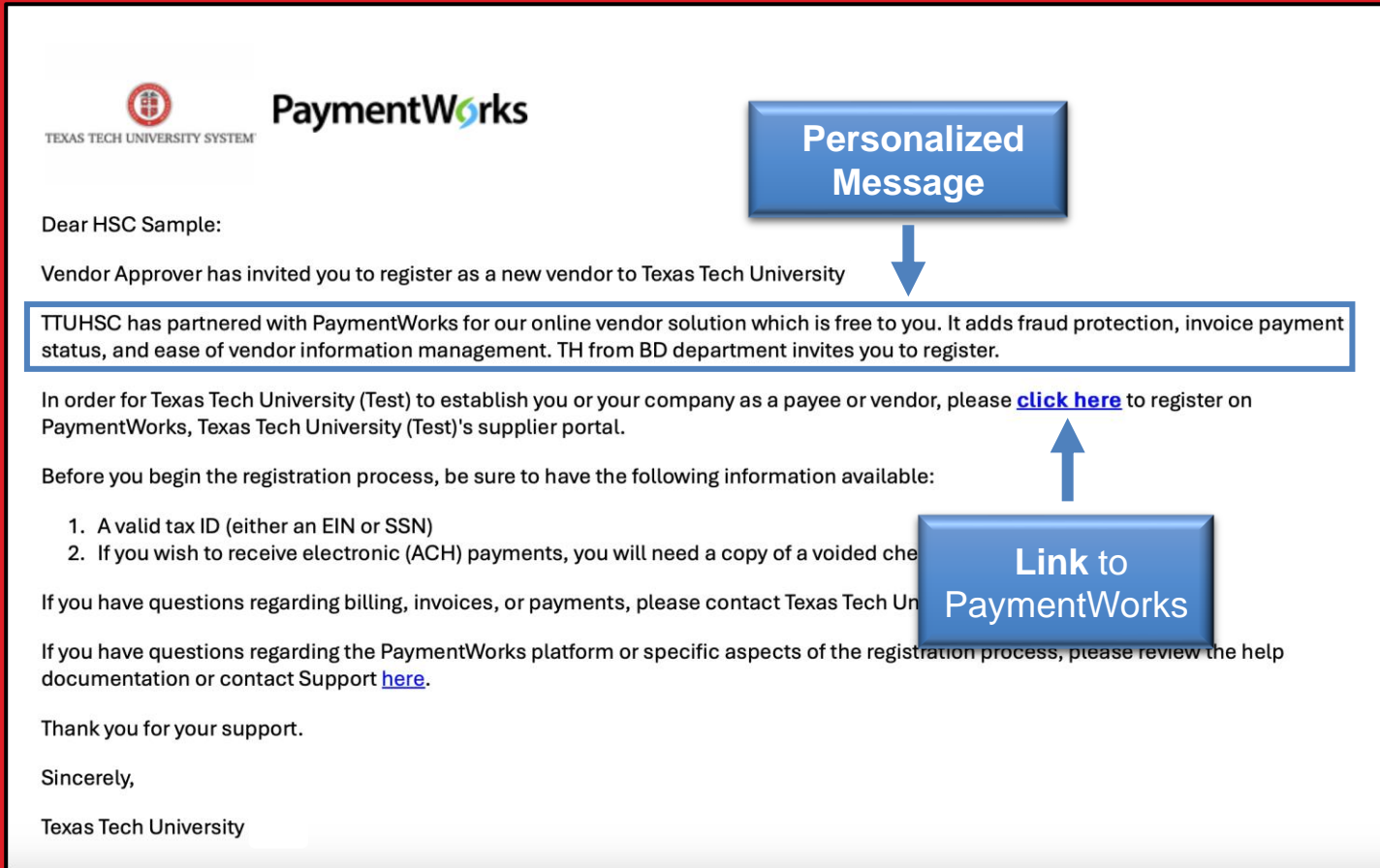
Annotations on the form include:

- A blue box labeled "Add Personalized Message" with an arrow pointing to the "Reason for inviting this supplier:" dropdown.
- A blue box labeled "Click Send" with an arrow pointing to the "Send" button.

# 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



The image shows a sample email invitation from Texas Tech University to a vendor. The email is titled "Personalized Message" and includes a "Link to PaymentWorks". The email content is as follows:

**TEXAS TECH UNIVERSITY SYSTEM** **PaymentWorks**

Dear HSC Sample:

Vendor Approver has invited you to register as a new vendor to Texas Tech University

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. TH from BD department invites you to register.

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

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

The email is annotated with two blue boxes and arrows. A box labeled "Personalized Message" has a downward arrow pointing to the text "TH from BD department invites you to register." A box labeled "Link to PaymentWorks" has an upward arrow pointing to the text "please [click here](#) to register on 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 Requests.

### Step 3:

Click the **requestion**, 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.

The screenshot shows the 'Comments' tab for requisition 4067836. A blue box at the top right says 'Click Plus Mark to add comment' with an arrow pointing to a '+' icon in the 'Show comments for' dropdown menu. Another blue box at the bottom right says 'Click Check Mark to save' with an arrow pointing to a checkmark icon in the comment form's top right corner. A third blue box at the bottom left says 'Add Comment: Payment Works invite sent to Vendor' with an arrow pointing to the text input area. The text input area contains the text 'PaymentWorks invite sent to vendor.' and shows '965 characters remaining'. Below the input area, a note states: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.' The form also includes an 'Email notification(s) | Add recipient' section with a checkbox and the name 'Hayden Vest (Prepared by, Approved) <Hayden.Vest@ttuhsc.edu>'. There is an 'Attach file (optional)' section with 'Attachment Type' (File selected, Link/URL unselected), a 'File Name' field, and 'Choose File' and 'Upload your file' buttons. The bottom of the page says 'No comments have been added'.

# 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.

The screenshot displays the PaymentWorks Onboarding Tracker interface. A blue box labeled "Statuses of Vendor Invitations" points to the progress bars. The interface shows a list of vendors with their onboarding progress:

- HSC Sample:** INVITATION INITIATED (04/22/2024 10:32 AM), EMAIL VERIFIED - INVITATION RECEIVED (04/22/2024 10:41 AM), ONBOARDING COMPLETE (04/22/2024 11:20 AM). Vendor Number: R11882201.
- TESTHSC:** INVITATION INITIATED (04/18/2024 2:18 PM), INVITATION LINK CLICKED (04/22/2024 10:03 AM, 1 day and 22 hours).
- Circle Catering:** INVITATION INITIATED (04/18/2024 10:33 AM), EMAIL VERIFIED - INVITATION RECEIVED (04/18/2024 10:39 AM), REGISTRATION APPROVED (04/18/2024 11:18 AM).
- Avaya:** INVITATION INITIATED (03/27/2024 9:33 AM), INVITATION EMAIL OPENED (04/18/2024 9:51 AM, 5 days and 23 hours).
- LBA Enterprises LLC:** INVITATION INITIATED (04/17/2024 1:45 PM), EMAIL VERIFIED - INVITATION RECEIVED (04/17/2024 3:52 PM), ONBOARDING COMPLETE (04/18/2024 9:32 AM). Vendor Number: R11982254.

A blue box labeled "Click Arrow in a Vendor Invitation" points to a right arrow icon next to the Circle Catering vendor's progress bar. The interface also includes a left sidebar with filters, a top navigation bar with "Home" and "New Vendors" tabs, and a top right section with "Help", "Account", and "Logout" links.

# 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)

The screenshot displays the PaymentWorks Vendor Master Updates interface. A blue callout box with the text "Click Invitation Detail" points to the "INVITATION DETAIL" tab in the "PROGRESS" section. The interface shows a timeline of events: "INVITATION INITIATED" (04/16/2024 8:18 AM), "EMAIL VERIFIED - INVITATION RECEIVED" (04/16/2024 8:28 AM), and "REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW" (04/17/2024 10:42 AM). The "INVITATION DETAIL" tab is selected, revealing the following information:

**Invitation Details**

Field	Value
Initiator:	TTUHSC Vendor Approver (ttupw2023+ttuhscapprover@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



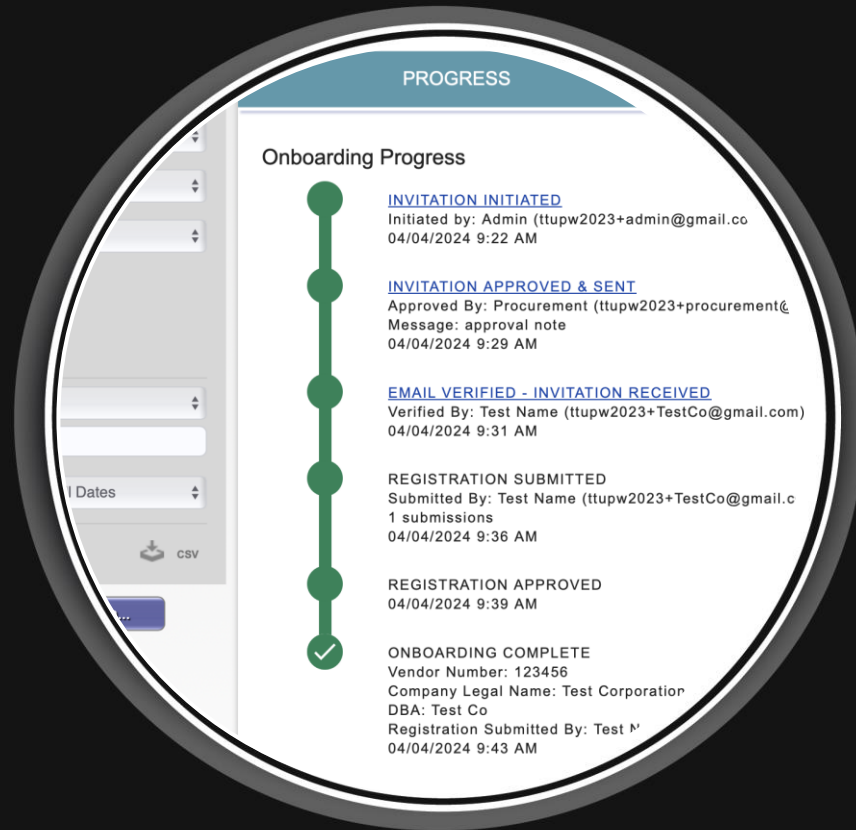
# Reviewing Invitation Status

## How to View the Statuses of Sent Invitations

The screenshot displays the PaymentWorks 'Onboardings' section. The top navigation bar includes 'Home', 'New Vendors', and a 'Vendor Master Updates' dropdown. A 'SHOW: Onboarding Tracker' dropdown is visible. The main content area is titled 'Onboardings' and features a 'Sort By' dropdown set to 'Date modified' in 'Descending' order. A blue box labeled 'Click Progress' points to the 'PROGRESS' tab, which is highlighted in teal. Below the tabs, a vertical timeline shows the onboarding progress. The timeline includes the following steps: 'INVITATION INITIATED' (initiated by TTUHSC Vendor Approver on 04/16/2024 at 8:18 AM), 'INVITATION APPROVED & SENT' (approved by Procurement on 04/16/2024 at 8:22 AM), 'EMAIL VERIFIED - INVITATION RECEIVED' (verified by Company Inc on 04/16/2024 at 8:26 AM), 'REGISTRATION SUBMITTED' (submitted by Company Inc on 04/17/2024 at 10:42 AM), 'REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW' (on 04/17/2024 at 10:42 AM, with a time in status of 7 days and 3 hours), and 'ONBOARDING COMPLETION'. A blue box labeled 'Click Status Link' points to the 'EMAIL VERIFIED - INVITATION RECEIVED' status link. The left sidebar contains filter results (46 Records) and various search filters for Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Show Canceled Only, Show Easy Cancel, Source, Invitation Initiator, and Invitation sent. A 'Clear Filters' button and a 'Send Invitation...' button are also present.

**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 Statuses



<u>Status Displayed</u>	<u>Definition</u>
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



<u>Status Displayed</u>	<u>Definition</u>
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



<u>Status Displayed</u>	<u>Definition</u>
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



<u>Status Displayed</u>	<u>Definition</u>
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

A black circle with a white border containing the text "Registration Approval Part 1" in white.

## Registration Approval Part 1

<u>Status Displayed</u>	<u>Definition</u>
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

<u>Status Displayed</u>	<u>Definition</u>
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

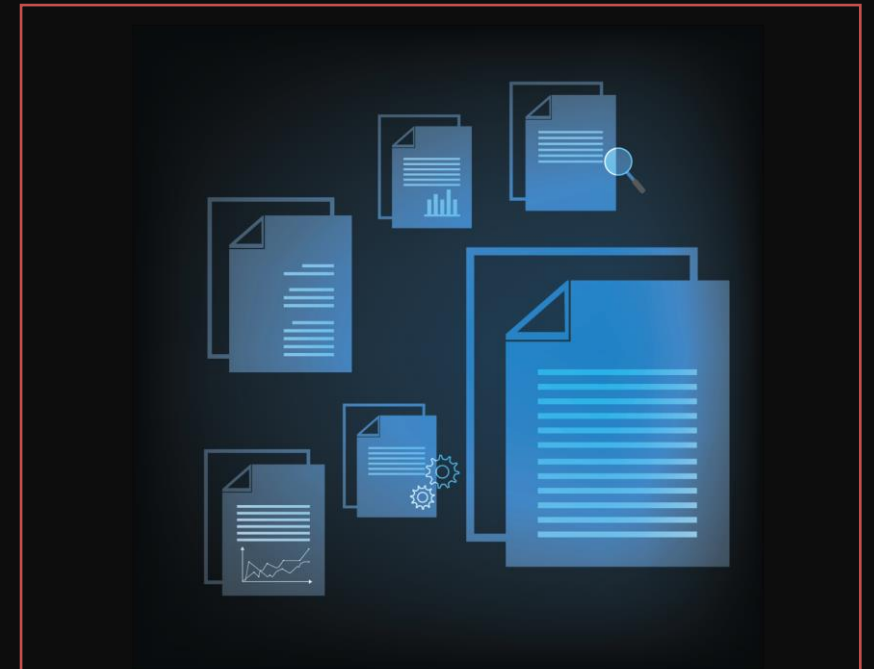
# Onboarding Statuses



<u>Status Displayed</u>	<u>Definition</u>
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

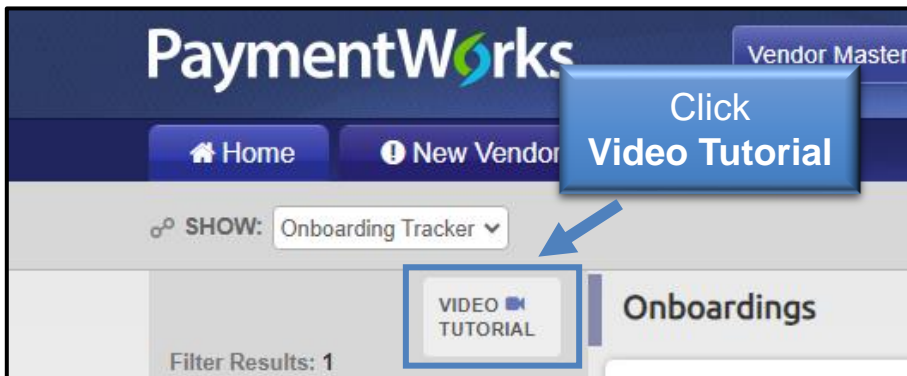
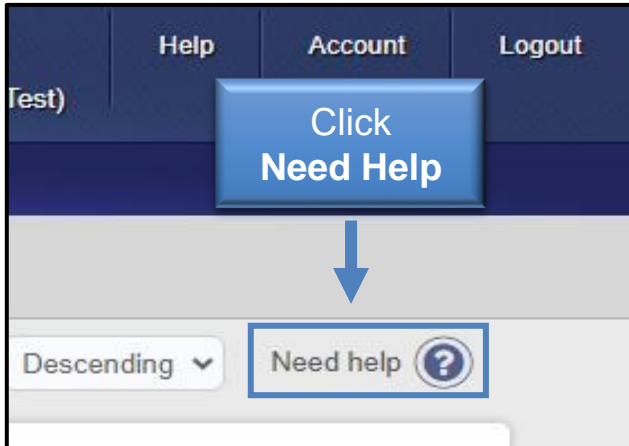
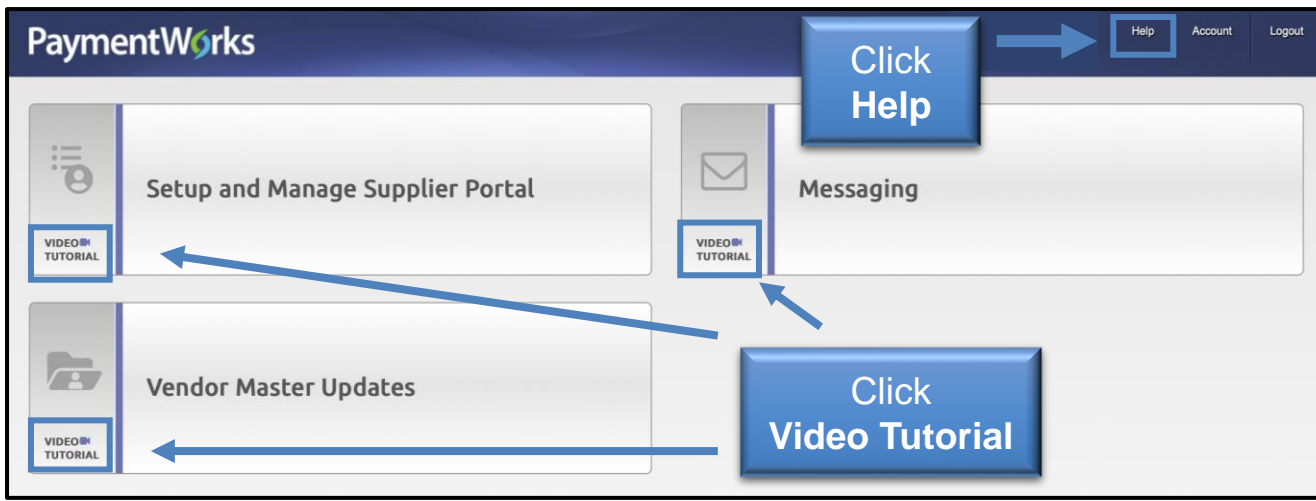


# When do I contact PaymentWorks Support versus the TTUHSC Vendor Team Support?

**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.

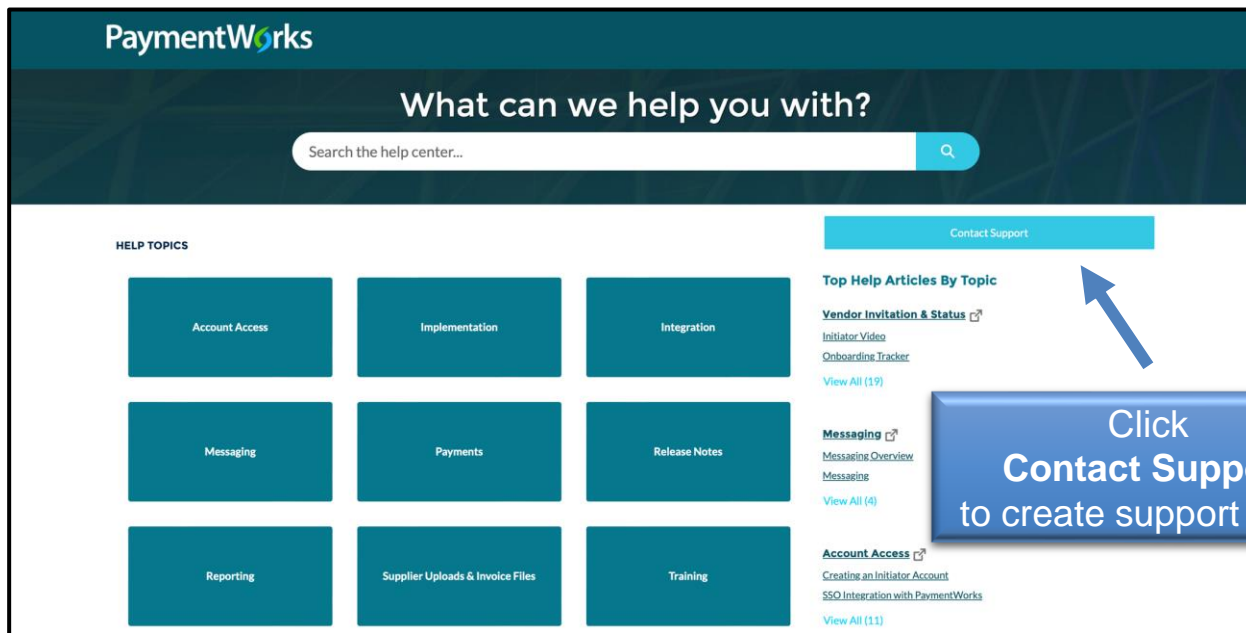
**For more detailed information about the differences in support, read this [helpful article](#) on the topic.**



# 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





### Manage Notifications (User Level)

Initiators receive email notifications when payees that they invite reach specific events in the onboarding process. By default, all initiators receive all notifications for all payees that they invite. Only the user who initiated the invitation receives notifications. In addition, only full registrations trigger notifications; PaymentWorks does not provide notifications on Updates, edit registrations, or partial registrations.

PaymentWorks recommends that users keep all notifications enabled and utilize an email filter to avoid missing notifications. If a user does not wish to receive notifications for one or more of the notification events, then the user can change the notifications that they receive on the Manage Notifications page of their account.

To change the notification configuration, the user clicks on the "Edit" button on the bottom right, unselects any undesired notifications, and then clicks the "Save" button on the bottom right. Each of the notification events can be configured separately.

PaymentWorks Account Management

Account

Personal setup Manage Notifications

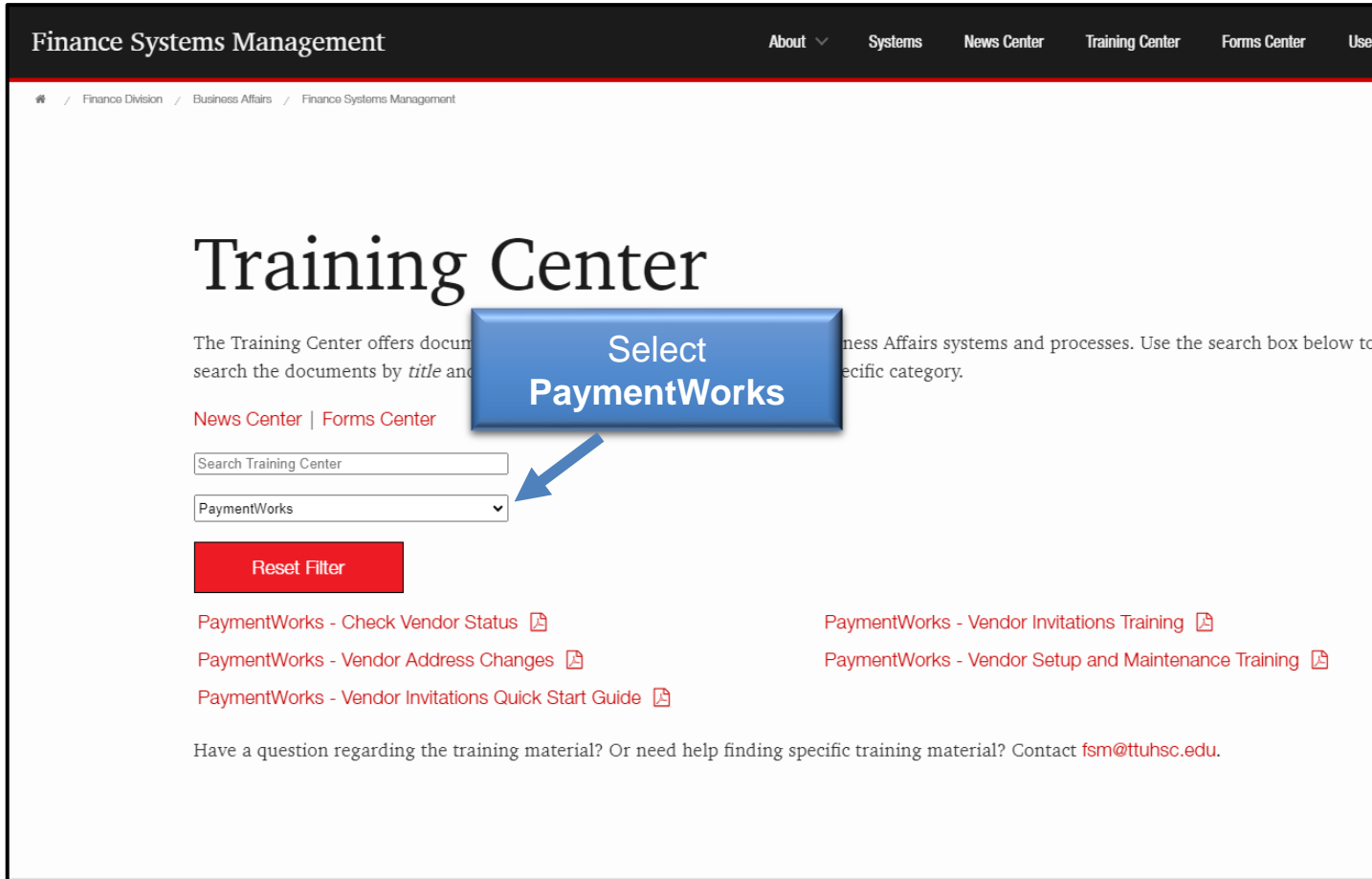
Personal information

Notify me when invitations I send are approved: Enabled

# 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



The screenshot shows the 'Finance Systems Management' website. The top navigation bar includes links for 'About', 'Systems', 'News Center', 'Training Center', 'Forms Center', and 'User'. Below the navigation bar, the breadcrumb trail reads: 'Home / Finance Division / Business Affairs / Finance Systems Management'. The main heading is 'Training Center'. A blue callout box with the text 'Select PaymentWorks' and an arrow points to the 'PaymentWorks' dropdown menu in the search section. The search section includes a 'Search Training Center' input field, a dropdown menu currently showing 'PaymentWorks', and a red 'Reset Filter' button. Below the search section, there are several links for training materials, including 'PaymentWorks - Check Vendor Status', 'PaymentWorks - Vendor Address Changes', 'PaymentWorks - Vendor Invitations Quick Start Guide', 'PaymentWorks - Vendor Invitations Training', and 'PaymentWorks - Vendor Setup and Maintenance Training'. At the bottom, there is a contact information line: 'Have a question regarding the training material? Or need help finding specific training material? Contact fsm@ttuhsc.edu.'

Finance Systems Management

About Systems News Center Training Center Forms Center User

Home / Finance Division / Business Affairs / Finance Systems Management

## Training Center

The Training Center offers documents and training materials for Business Affairs systems and processes. Use the search box below to search the documents by *title* and *category*.

News Center | Forms Center

Search Training Center

PaymentWorks

Reset Filter

PaymentWorks - Check Vendor Status

PaymentWorks - Vendor Address Changes

PaymentWorks - Vendor Invitations Quick Start Guide

PaymentWorks - Vendor Invitations Training

PaymentWorks - Vendor Setup and Maintenance Training

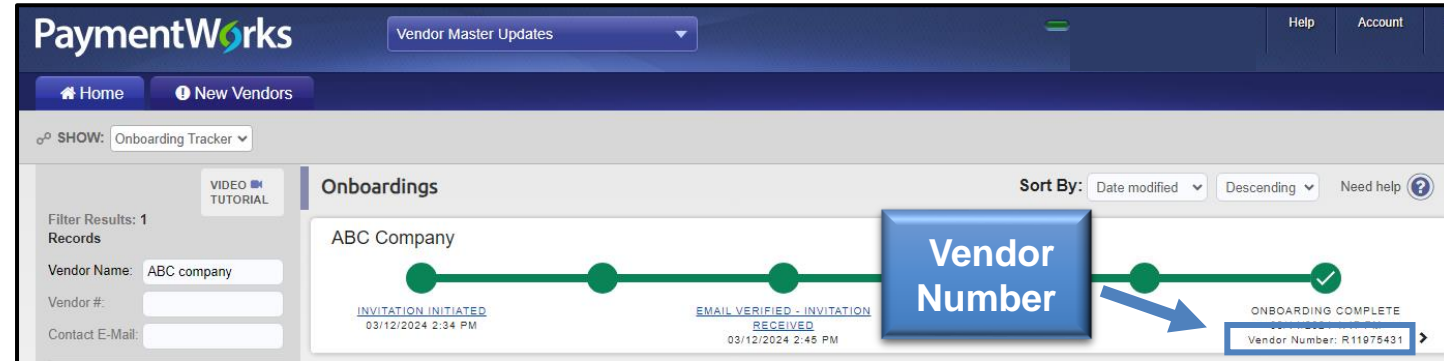
Have a question regarding the training material? Or need help finding specific training material? Contact fsm@ttuhsc.edu.

- 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.

# Troubleshooting



# Troubleshooting

*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

**PaymentWorks** Vendor Master Updates Help Account Log

Home New Vendors

SHOW: Onboarding Tracker VIDEO TUTORIAL

Filter Results: 45 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...

### Onboardings

Sort By: Date modified Descending Need help?

**TESTHSC**

INVITATION INITIATED 04/18/2024 2:18 PM

INVITATION EMAIL OPENED 04/22/2024 9:46 AM

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	Email Sent: 04/22/2024	Invitation Reminders: Enabled
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#### 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

#### Approval History:

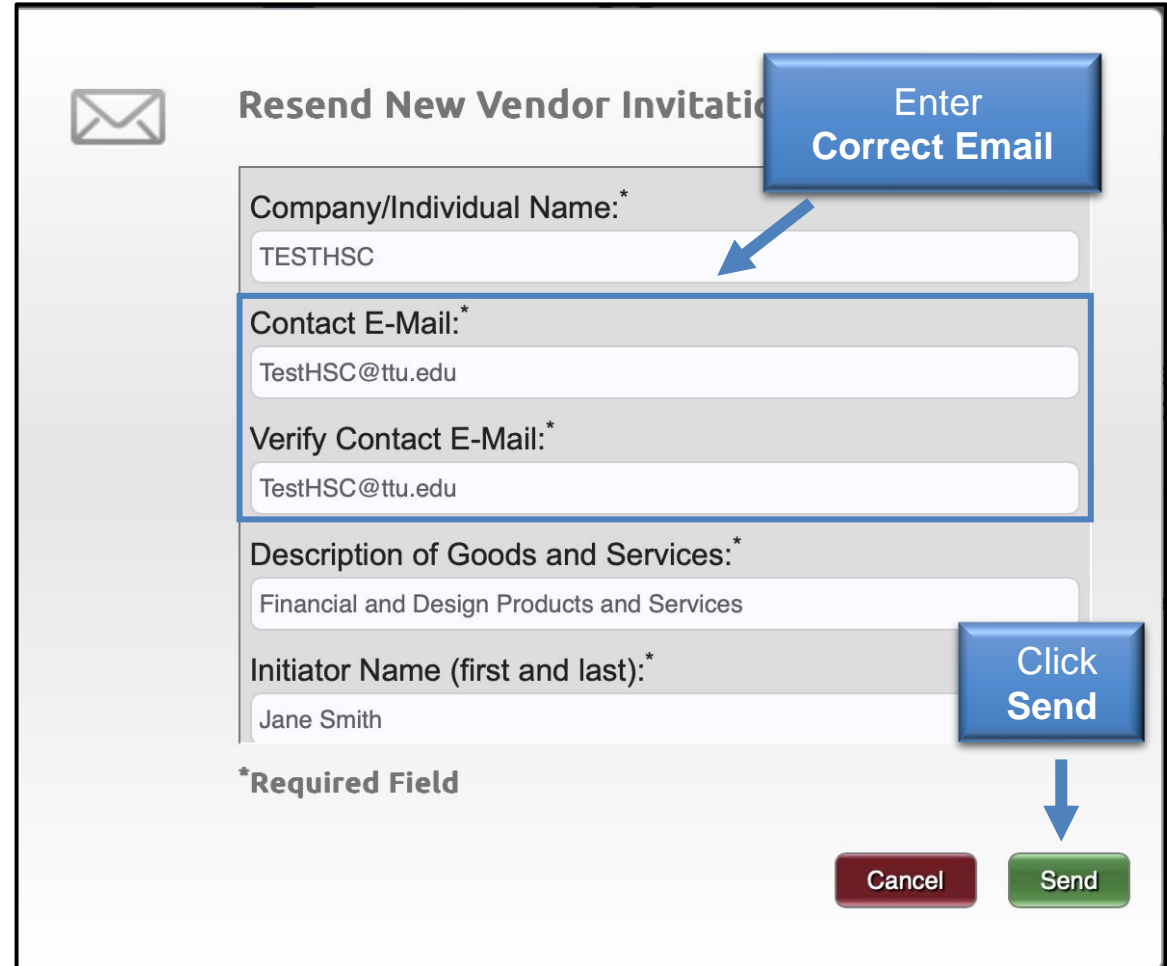
Apr 22, 2024 9:30 AM: Approved by Procurement <tupw2023+procurement@gmail.com> (Procurement)  
Message: None

Cancel Invitation Disable Reminders Resend Invitation

# Troubleshooting

*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.



The screenshot shows a web form titled "Resend New Vendor Invitation" with an envelope icon. The form contains several input fields and buttons. A blue box labeled "Enter Correct Email" with an arrow points to the "Contact E-Mail:" field. Another blue box labeled "Click Send" with an arrow points to the "Send" button at the bottom right. The form fields are as follows:

- 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

At the bottom, there is a legend for "\*Required Field", a "Cancel" button, and a "Send" button.

# 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.

The screenshot shows the 'Onboardings' page for 'TESTHSC'. A progress bar at the top indicates the status of the invitation: 'INVITATION INITIATED' (04/18/2024 2:18 PM) and 'INVITATION PENDING APPROVAL' (04/18/2024 2:18 PM). A blue arrow points to the 'INVITATION PENDING APPROVAL' status, with a callout box saying 'Click Invitation Status'. Below the progress bar, there are two tabs: 'PROGRESS' and 'INVITATION DETAIL'. The 'INVITATION DETAIL' tab is selected, showing 'Invitation Details' and 'Personalized Message'. The 'Invitation Details' section includes fields for Initiator, Vendor Name, Contact E-mail, Initiated, and Invitation Reminders. The 'Personalized Message' section contains a message from S. Myers from FSM inviting the vendor to PaymentWorks at TTUHSC. Below the message, there are 'Initiator Fields' including Description of Goods and Services, Initiator Name, Initiator Email, Initiator Department, Initiator Phone Number, and Reason for inviting this supplier. A blue arrow points to the 'Cancel Invitation' button, with a callout box saying 'Click Cancel Invitation'.

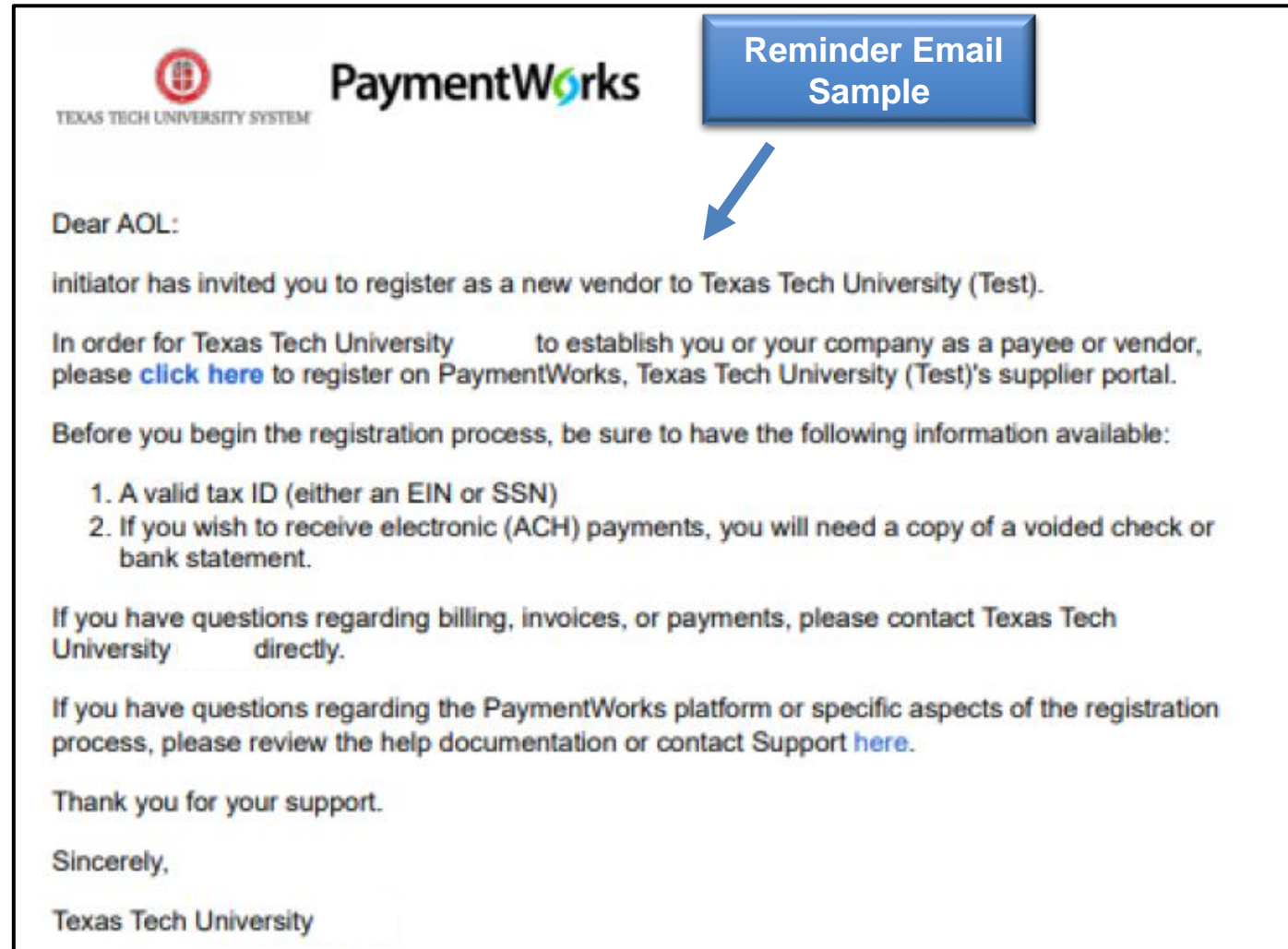
The screenshot shows a confirmation screen with a warning icon and the text: 'You are about to cancel this invitation. This invitation cannot be restored, but you will be able to send a new invitation to the vendor. Would you like to proceed?'. There are two buttons: 'Cancel' and 'Ok'. A blue arrow points to the 'Ok' button, with a callout box saying 'Click OK'.



# Troubleshooting

***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:
  - 1<sup>st</sup> reminder – three days
  - 2<sup>nd</sup> reminder – seven days
  - 3<sup>rd</sup> reminder – 14 days
  - 4<sup>th</sup> reminder – 21 days
  - 5<sup>th</sup> reminder – 28 days



# Troubleshooting

*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.

The screenshot shows the PaymentWorks interface for managing vendor onboarding. The top navigation bar includes 'PaymentWorks', 'Vendor Master Updates', 'Help', 'Account', and 'Log'. The main header has 'Home' and 'New Vendors' tabs. The left sidebar shows 'SHOW: Onboarding Tracker' and a 'VIDEO TUTORIAL' link. Below this is a filter section with 'Filter Results: 45 Records' and fields for 'Vendor Name', 'Vendor #', and 'Contact E-Mail'. There are also dropdowns for 'Invitation Approval', 'Invitation Delivered', 'Account Created', and 'Registration Form', along with checkboxes for 'Show Cancelled Only' and 'Show Easy Cancel'. A 'Source' dropdown and 'Invitation' fields are at the bottom of the sidebar. The main content area is titled 'Onboardings' and shows a progress bar for 'TESTHSC' with two steps: 'INVITATION INITIATED' (04/18/2024 2:18 PM) and 'INVITATION EMAIL OPENED' (04/22/2024 9:46 AM). A blue box with an arrow points to the second step, labeled 'Click Invitation Status'. Below the progress bar is a table with 'Invitation Details' including 'Initiator', 'Vendor Name', 'Contact E-mail', 'Initiated', 'Email Sent', and 'Invitation Reminders'. A 'Personalized Message' section follows, along with 'Initiator Fields' and an 'Approval History' section. At the bottom right, a blue box with an arrow points to the 'Disable Reminders' button, labeled 'Click Disable Reminders'. The bottom of the page has three buttons: 'Cancel Invitation', 'Disable Reminders', and 'Resend Invitation'.

PaymentWorks Vendor Master Updates Help Account Log

Home New Vendors

SHOW: Onboarding Tracker VIDEO TUTORIAL

Filter Results: 45 Records

Vendor Name: Vendor #: Contact E-Mail:

Invitation Approval: Invitation Delivered: Account Created: Registration Form:

Show Cancelled Only: Show Easy Cancel:

Source: Invitation: Invitation sent: All Dates

Clear Filters CSV

Send Invitation...

Onboardings

TESTHSC

INVITATION INITIATED 04/18/2024 2:18 PM INVITATION EMAIL OPENED 04/22/2024 9:46 AM

Click Invitation Status

PROGRESS INVITATION DETAIL

Invitation Details

Initiator:	Vendor Name:	Contact E-mail:	Initiated:	Email Sent:	Invitation Reminders:
Shannon Myers (shannon.myers@ttuhsc.edu)	TESTHSC	shannon.myers@ttu.edu	04/18/2024	04/22/2024	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

Approval History:

Apr 22, 2024 9:30 AM: Approved by Procurement <ttupw2023+procurement@gmail.com> (Procurement)

Message: None

Click Disable Reminders

Cancel Invitation Disable Reminders Resend Invitation

# Contact Information

If you have additional questions, please  
contact the Vendor Team at  
[vendorteam@ttuhsc.edu](mailto:vendorteam@ttuhsc.edu).