

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

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.

The screenshot displays the Texas Tech University WebRaider portal interface. The top navigation bar includes the university logo and the text "Business Affairs" and "HSC / Business Affairs". A red sidebar on the left contains a menu with items: Home, Employee, Available Budget, F&A Work Tools, Payroll & T, Business Affairs (highlighted), Supervisor, My Content, Cognos, Facilities & Safety, and News. A blue callout box labeled "Select Business Affairs tab" has an arrow pointing to the "Business Affairs" menu item. The main content area is titled "Commonly Used Links" and lists various services such as Calendar, Cognos, Forms Center, News Center, Training Center, and User Groups. Below this is a "Department Homepages" section with links for Accounting Services, Application Development, Business Affairs, Contracting, Finance Systems Management, and Student Business Services. A blue callout box labeled "Click PaymentWorks" has an arrow pointing to the "PaymentWorks" link in the "System Links" section of the "Links to Financial Systems" area. The "System Links" section lists various financial systems, with "PaymentWorks" highlighted by a blue box.

Search for a Vendor/Payee

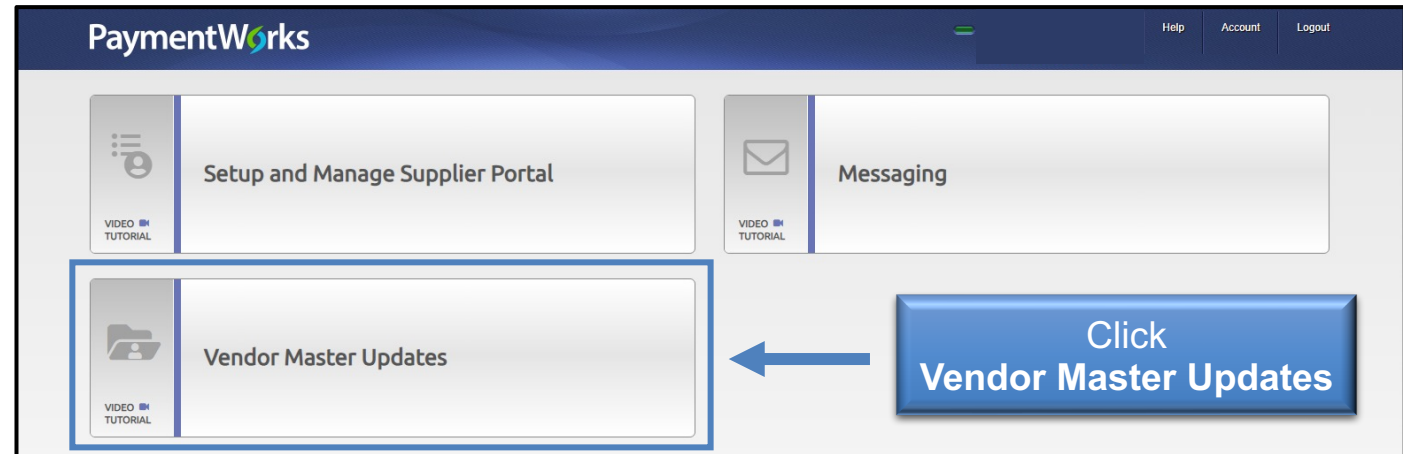
How to Search

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.

The screenshot displays the PaymentWorks Onboardings interface. The top navigation bar includes the PaymentWorks logo, a 'Vendor Master Updates' dropdown, and links for 'Help', 'Account', and 'Logout'. Below the navigation bar, there are tabs for 'Home' and 'New Vendors'. The main content area is titled 'Onboardings' and features a 'SHOW: Onboarding Tracker' dropdown. On the left side, there is a filter panel with the following options:

- Filter Results: 46 Records
- Vendor Name: [Text Input]
- Vendor #: [Text Input]
- Contact E-Mail: [Text Input]
- Invitation Approval: [Dropdown]
- Invitation Delivered: [Dropdown]
- Account Created: [Dropdown]
- Registration Form: [Dropdown]
- Show Cancelled Only: [Checkbox]
- Show Easy Cancel: [Checkbox]
- Source: [Dropdown]
- Invitation Initiator: [Text Input]
- Invitation sent: All Dates [Dropdown]
- Clear Filters [Button]
- Send Invitation... [Button]

The main area shows a list of onboarding progress for five vendors, each with a horizontal timeline and a 'Sort By' dropdown set to 'Date modified' in 'Descending' order. The progress bars are color-coded: green for completed, blue for in progress, and grey for not started.

Vendor Name	Progress Status	Key Milestones
HSC Sample	Completed	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)
TESTHSC	In Progress	INVITATION INITIATED (04/18/2024 2:18 PM), INVITATION LINK CLICKED (04/22/2024 10:03 AM)
Circle Catering	In Progress	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	In Progress	INVITATION INITIATED (03/27/2024 9:33 AM), INVITATION EMAIL OPENED (04/18/2024 9:51 AM)
LBA Enterprises LLC	Completed	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)

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

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

Send Invitation...

Inviting a Vendor/Payee

How to Send Invitations

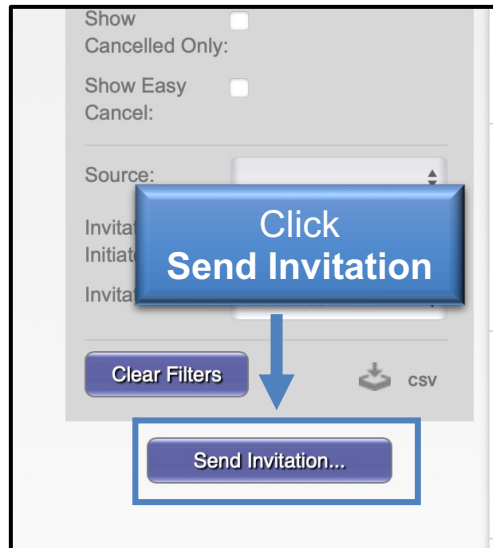
Step 1:

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 'Invite New Vendor' form. It features an envelope icon and the title 'Invite New Vendor'. The form contains several required fields, each 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 displayed below the first field. A blue callout box with the text 'Enter Invitation Information' has an arrow pointing to the 'Company/Individual Name.*' field. At the bottom of the form, 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.

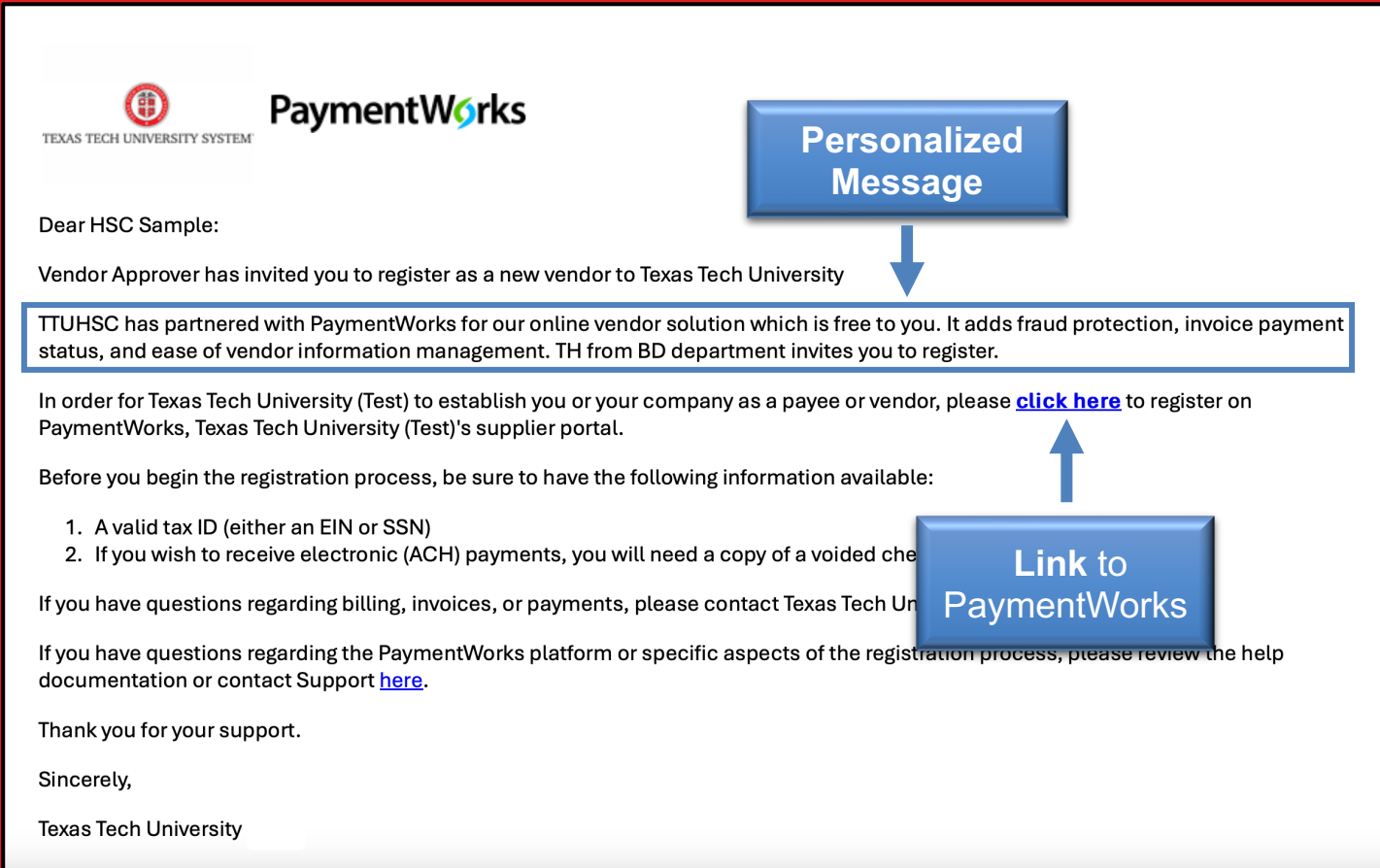
The screenshot shows a web form titled "Invite New Vendor" with an envelope icon. The form includes the following fields and elements:

- Initiator Phone Number:** A text input field with a blue callout box labeled "Add Personalized Message" pointing to it.
- Reason for inviting this supplier:*** A dropdown menu currently showing "- Choose One -". A blue arrow points from the callout box to this dropdown.
- 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 area is highlighted with a blue border.
- *Required Field:** A label at the bottom left of the form.
- Buttons:** A red "Cancel" button and a green "Send" button. A blue callout box labeled "Click Send" has 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. At the top left is the Texas Tech University System logo and the PaymentWorks logo. A blue box labeled 'Personalized Message' has a downward arrow pointing to the salutation 'Dear HSC Sample:'. Below this, a blue box labeled 'Link to PaymentWorks' has an upward arrow pointing to a blue-bordered text box containing the main invitation message. The text includes details about the partnership with PaymentWorks, a 'click here' link for registration, and a list of required information for registration.

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 Support at [\(940\) 756-3333](#).

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

Reviewing Invitation Status

How to View the Statuses of Sent Invitations

Step 1:

From the New Vendors tab, 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. At the top, there is a navigation bar with 'Home' and 'New Vendors' tabs. A blue box labeled 'Statuses of Vendor Invitations' points to the main content area. The interface shows a list of vendors with their invitation progress tracked via a horizontal timeline of bubbles. The vendors listed are HSC Sample, TESTHSC, Circle Catering, Avaya, and LBA Enterprises LLC. Each vendor's progress is shown with a timeline of bubbles representing different stages: INVITATION INITIATED, EMAIL VERIFIED - INVITATION RECEIVED, INVITATION LINK CLICKED, INVITATION EMAIL OPENED, and REGISTRATION APPROVED. A blue box labeled 'Click Arrow in a Vendor Invitation' points to a right-pointing arrow icon next to the Circle Catering vendor's timeline. The interface also includes a filter sidebar on the left, a 'Sort By' dropdown, and a 'Need help' link.

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

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" and an arrow points to the "INVITATION DETAIL" column in the progress bar. The progress bar shows three stages: "INVITATION INITIATED" (04/16/2024 8:18 AM), "EMAIL VERIFIED - INVITATION RECEIVED" (04/19/2024 8:28 AM), and "REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW" (04/17/2024 10:42 AM). Below the progress bar, the "Invitation Details" section is visible, containing fields for Initiator, Vendor Name, Contact E-mail, Initiated, Email Sent, and Invitation Reminders. The "Personalized Message" section shows a test message. The "Initiator Fields" section lists details such as Description of Goods and Services, Initiator Name, Initiator Email, Initiator Department, Initiator Phone Number, and Reason for inviting this supplier. The "Approval History" section shows a message from Procurement dated Apr 16, 2024 8:22 AM.

Reviewing Invitation Status

How to View the Statuses of Sent Invitations

The screenshot displays the PaymentWorks 'Onboardings' interface. At the top, there are navigation links for 'Home' and 'New Vendors', and a 'Vendor Master Updates' dropdown menu. A blue callout box labeled 'Click Progress' points to the 'PROGRESS' tab in the 'Onboardings' section. Below the tabs, there are filter options for 'Date modified' and 'Descending'. The main content area shows an 'Onboarding Progress' timeline with several status updates:

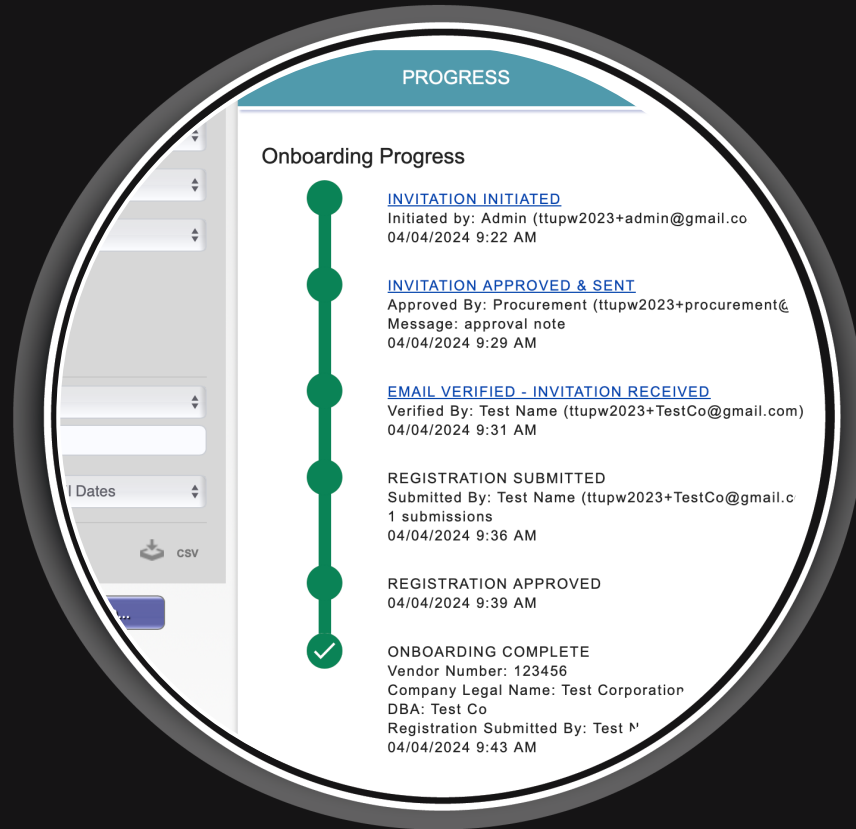
- INVITATION INITIATED**: Initiated by: TTUHSC Vendor Approver (ttupw2023+ttuhscapprover@gmail.com) 04/16/2024 8:18 AM
- INVITATION APPROVED & SENT**: Approved By: Procurement (ttupw2023+procurement@gmail.com) Message: Approval note 04/16/2024 8:22 AM
- EMAIL VERIFIED - INVITATION RECEIVED**: Verified By: Company Inc (ttupw2023+companyinc@gmail.com) 04/16/2024 8:26 AM
- REGISTRATION SUBMITTED**: Submitted By: Company Inc (ttupw2023+companyinc@gmail.com) 1 submissions 04/17/2024 10:42 AM
- REGISTRATION SUBMITTED - PENDING INTERNAL REVIEW**: 04/17/2024 10:42 AM Time in status: 7 days and 3 hours
- ONBOARDING COMPLETION**

A blue callout box labeled 'Click Status Link' points to the 'EMAIL VERIFIED - INVITATION RECEIVED' status link. On the left side of the interface, there are various filter fields for 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', and 'Source'. There are also checkboxes for 'Show Cancelled Only', 'Show Easy', and 'Cancel'. A 'Send Invitation...' button is located at the bottom left.

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 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



**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

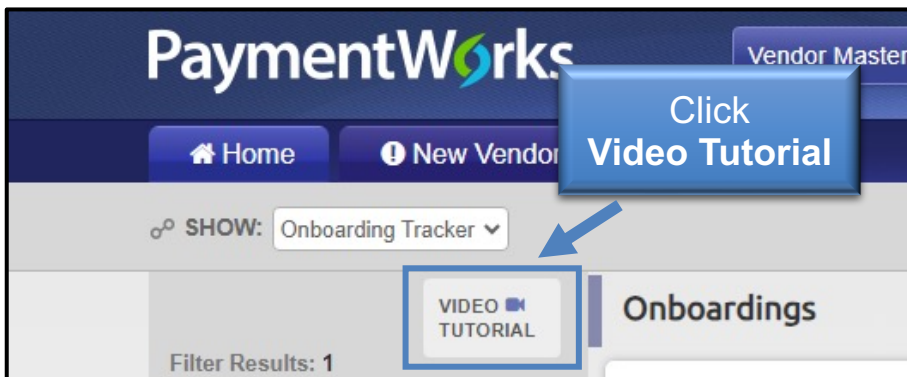
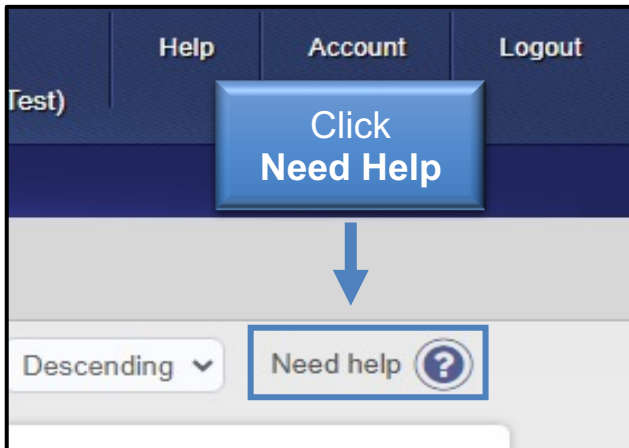
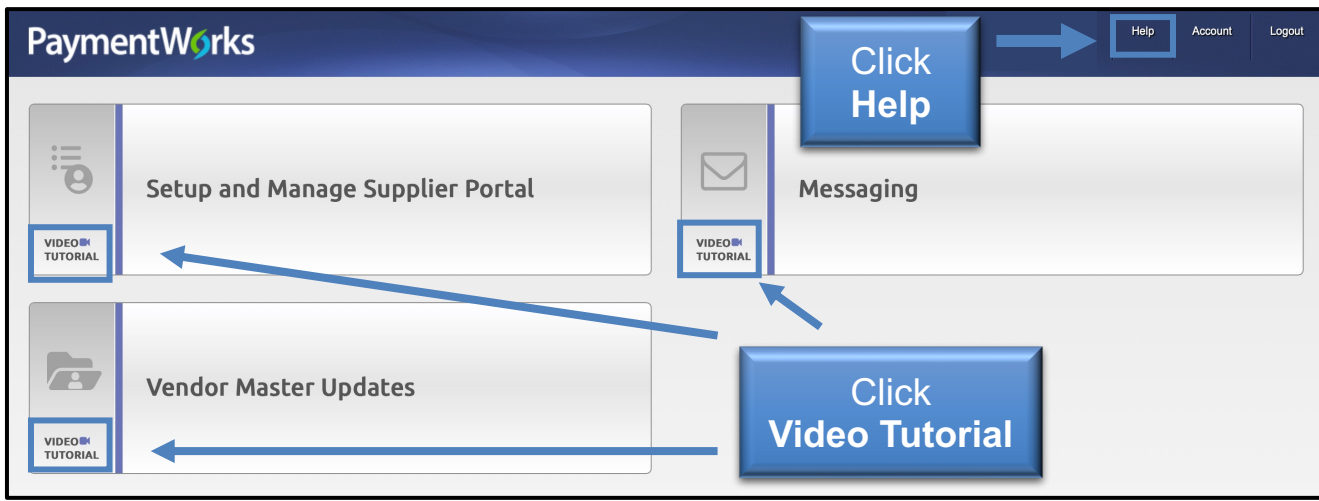


When do I contact PaymentWorks Support versus the TTUHSC Vendor Team Support?

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

Online Help

- The PaymentWorks Help Center provides articles by topics
- Create a Support ticket using the **Contact Support** button in the Help Center
- Use the [Training Center](#) for TTUHSC training documentation related to PaymentWorks

PaymentWorks

What can we help you with?

Search the help center...

HELP TOPICS

Account Access Implementation Integration

Messaging Payments Release Notes

Reporting Supplier Uploads & Invoice Files Training

Contact Support

Top Help Articles By Topic

Vendor Invitation & Status [?](#)

Initiator Video

Onboarding Tracker

[View All \(19\)](#)

Messaging [?](#)

Messaging Overview

Messaging

[View All \(4\)](#)

Account Access [?](#)

Creating an Initiator Account

SSO Integration with PaymentWorks

[View All \(11\)](#)

Click Contact Support to create support ticket

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER

Directory WebRaider Site Map

Finance Systems Management

About Systems News Center Training Center Forms Center User Groups Business Affairs

Finance Division / Business Affairs / Finance Systems Management

Training Center

The Training Center offers documents and reference materials related to Business Affairs systems and processes. Use the search box below to search the documents by *title* and/or the category dropdown to filter for a specific category.

[News Center](#) | [Forms Center](#)

Search Training Center

Filter by Category

Reset Filter

[9 Cash Receipts Submission Responsibilities](#)

[Financial Manager Quick Start Guide](#)

[9 ert Responsibilities for Certifiers](#)

[Fund Attributes](#)

[9 ert Responsibilities for Effort Coordinators](#)

[Fund Hierarchy](#)

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 screenshot shows the PaymentWorks interface for the 'Onboardings Tracker'. The vendor 'ABC Company' is listed with a progress bar showing the following steps:

- INVITATION INITIATED (03/12/2024 2:34 PM)
- EMAIL VERIFIED - INVITATION RECEIVED (03/12/2024 2:45 PM)
- Vendor Number** (highlighted in a blue box)
- ONBOARDING COMPLETE (03/12/2024 2:45 PM)

The 'Vendor Number' is displayed as R11975431. The interface includes a 'Vendor Master Updates' dropdown menu, 'Home' and 'New Vendors' buttons, and a 'SHOW: Onboarding Tracker' filter. The 'Sort By' options are 'Date modified' and 'Descending'. A 'Need help?' link is also visible.

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

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

Send Invitation...

Onboardings

TESTHSC

Sort By: Date modified Descending Need help

INVITATION INITIATED 04/18/2024 2:18 PM

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

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 <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" has an arrow pointing to the "Company/Individual Name:" field, which contains "TESTHSC". Another blue box labeled "Click Send" has an arrow pointing to the "Send" button at the bottom right. The "Contact E-Mail:" field contains "TestHSC@ttu.edu" and is highlighted with a blue border. The "Verify Contact E-Mail:" field also contains "TestHSC@ttu.edu". The "Description of Goods and Services:" field contains "Financial and Design Products and Services". The "Initiator Name (first and last):" field contains "Jane Smith". At the bottom, there are "Cancel" and "Send" buttons. A legend indicates that an asterisk (*) denotes a required field.

Resend New Vendor Invitation

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

*Required Field

Enter Correct Email

Click Send

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

Click Invitation Status

INVITATION INITIATED
04/18/2024 2:18 PM

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

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?

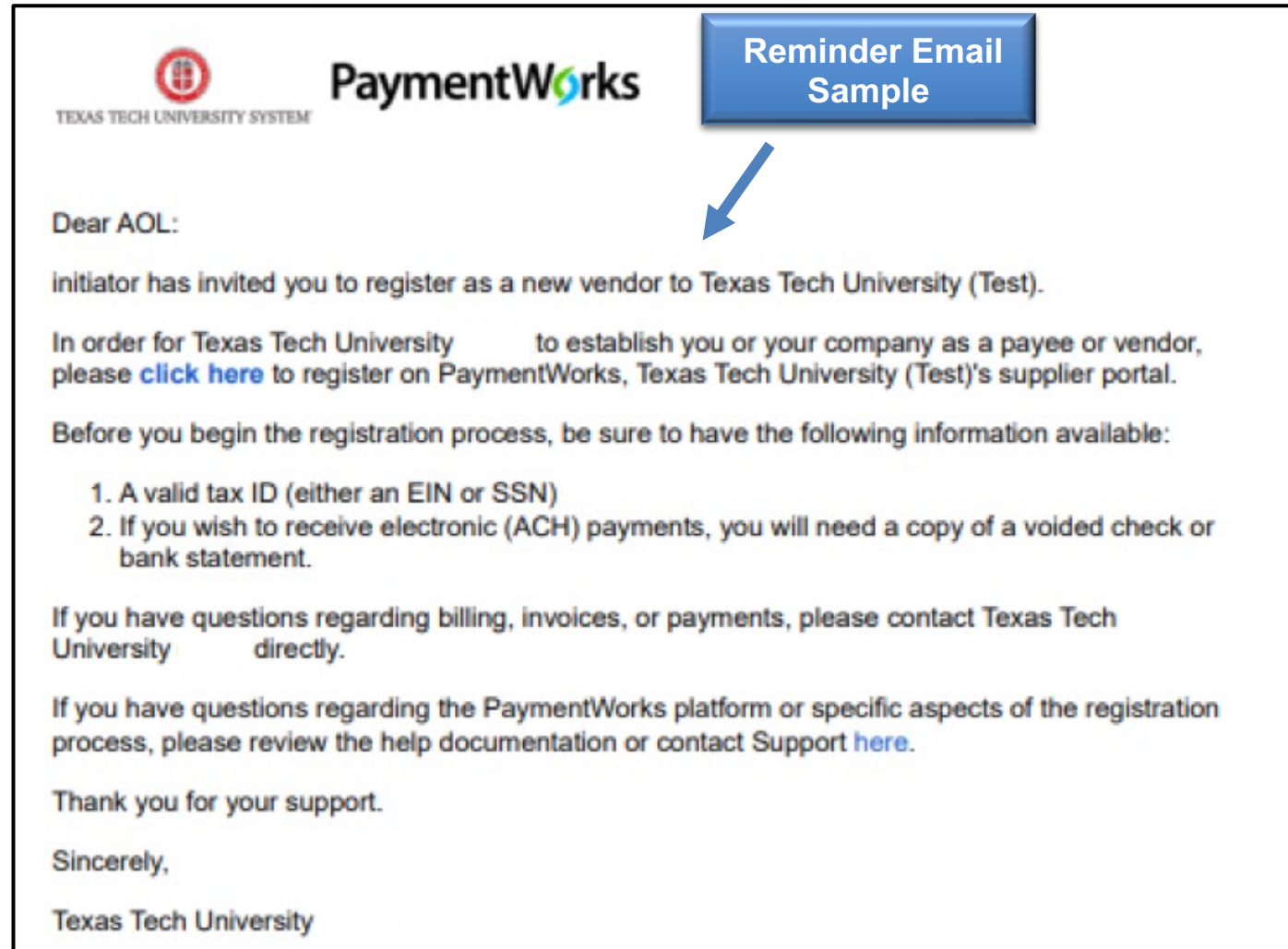
Click OK


Cancel Ok

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:
 - 1st reminder – three days
 - 2nd reminder – seven days
 - 3rd reminder – 14 days
 - 4th reminder – 21 days
 - 5th reminder – 28 days



 **PaymentWorks**

TEXAS TECH UNIVERSITY SYSTEM

Reminder Email Sample

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

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.

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

TESTHSC

Click Invitation Status

Descending Need help ?

INVITATION INITIATED 04/18/2024 2:18 PM

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

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.