Steps to follow before sending an Invitation

Initiator Role/Duplicated Registration

Part I. Check to see if the vendor is setup in PaymentWorks.

1. Log in to PaymentWorks at one of the link below:
   1) UH Main Campus:  [https://paymentworks.com/login/saml/?idp=houstonmain](https://paymentworks.com/login/saml/?idp=houstonmain)
   2) UH Victoria:  [https://paymentworks.com/login/saml/?idp=houstonvictoria](https://paymentworks.com/login/saml/?idp=houstonvictoria)
   3) UH Clear Lake:  [https://paymentworks.com/login/saml/?idp=houstonclearlake](https://paymentworks.com/login/saml/?idp=houstonclearlake)
   4) UH Downtown:  [https://paymentworks.com/login/saml/?idp=houstondowntown](https://paymentworks.com/login/saml/?idp=houstondowntown)

2. Click “Vendor Master Updates”

3. Drop down and click “Setup and Manage Supplier Portal”

4. Click “Suppliers tab”
5. Enter “supplier Name” to search the vendor, and then you will see the Green Dot under the Connected Column as below.
   - For individual vendor: enter the Last name, First name
   - For business vendor: enter the partial short name
Part II  3 Easy Steps to send an invitation

1. **Navigate**  www.uh.edu/finance – Departments - AP General – PaymentWorks – click your institution’s link. Then click Vendor Master Updates (1), New Vendors (2), verify you are on Onboardings (3), and click Send Invitation (4).

2. **Invite**  Complete the vendor invitation form and click send. Reason for inviting is not material—just select the most appropriate. The personalized message will be sent to the vendor as part of the invitation.

3. **Monitor**  Monitor the progress on that page in PaymentWorks and watch for a vendor number when the process is complete. The timeline varies (most cases 1-2 weeks from vendor’s application); some steps cannot be rushed to allow us to verify that we can do business with the vendor based the documentation provided.

This is a quick version of the procedures. For more in-depth procedures or troubleshooting information, visit https://uh.edu/office-of-finance/ap-general/ in the PaymentWorks section.