What value does PaymentWorks bring to your organization?

- Eliminate Payments Fraud
- Ensures Compliance
- Trust your vendor identity information
- Eliminate #1 Pain Point in Procure to Pay Process
Vendor Onboarding: A Time-Saving Process

1. Initiate Vendor Invite
2. Send Invitation
3. Create PaymentWorks Account
4. Complete Registration
5. Screen (TIN, Sanction, etc.)
6. Approve Workflow
7. Create or Update Vendor
8. Notify PaymentWorks
9. Send Notification
10. Update Profile Information
11. Approve Updates
12. Update Record

Logging In

TIP: If you are on a machine and already logged in to other applications with your usual UHCL, UHD, UHV, or UH credentials, then it will simply bring you to the main screen below. Otherwise, you will see one of the screens to the right. Log in with your usual credentials.
Search For Vendor

Step 1:
• Once logged into PaymentWorks, click on Vendor Master Updates.

Step 2:
• Next click on the New Vendors tab.

Search For Vendor

Step 3:
• Under Filter Results, you can now search for the vendor via their email address or vendor name.

Next Steps:
• This will bring up the request and provide you a status of it. If no results are found, you will need to invite the vendor.
Inviting a Vendor

Step 1:
- Once logged into PaymentWorks, click on Vendor Master Updates.

Step 2:
- Next click on the New Vendors tab.

Step 3:
- Click on Send Invitation button.

Initiator Video (Link)
Inviting a Vendor

Step 4:

• Invite screen will appear. Fill out the form and click “send” button when completed.

• A confirmation that the invitation has been sent will pop up, click “Ok”.

Sample Vendor Invitation

Sample email that is sent to Vendor after invitation is sent.

Dear Daily Duck:

Per Masaccio’s invitation, you will need to register as a new vendor with University of Houston System (UH). The UH System includes the University of Houston (UH), UH-Downtown, UH-Clear Lake, and UH-Victoria.

You have been invited to register with University of Houston System. In order for us to establish your company as a payer or vendor, please click here to register on PaymentWorks, UH System’s supplier portal.

Sample email that is sent to Vendor after invitation is sent.

If you have any questions regarding filing, invoice, or payment information, please visit https://uhpay.uh.edu/uhofficeofbursarinfo which includes a link to Payment Information for vendor payment information.

Thank you for your support.

Sincerely,

University of Houston System (UH)
Vendor Setup Supplemental Form

Review Invite Status

Step 1:
• Confirm you are on the Vendor Master Updates page.

Step 2:
• Click on the New Vendors tab.
On the Vendor Master Updates page, click on the New Vendors tab.

Here is where you can track the status for Vendors.

Review Invite Status

Step 3:
- Under column labeled ‘Invitation’ you can review the status.
## Tracking Onboarding

### Invitation Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Approval</td>
<td>Invitation is in queue to be reviewed. This step includes PaymentWorks validations and UH setup.</td>
</tr>
<tr>
<td>Opened</td>
<td>Vendor has opened the invitation email.</td>
</tr>
<tr>
<td>Clicked</td>
<td>Vendor has received the invitation email and clicked on the link to get started.</td>
</tr>
<tr>
<td>Undeliverable</td>
<td>Invitation delivery was unsuccessful. This usually indicates the contact email address was invalid.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The invitation has been cancelled.</td>
</tr>
</tbody>
</table>

## Tracking Onboarding

### Account Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Account</td>
<td>Vendor has not used their invitation to create their account.</td>
</tr>
<tr>
<td>Registered</td>
<td>Vendor account was created but not activated.</td>
</tr>
<tr>
<td>Email Validated</td>
<td>Vendor has created and activated their account.</td>
</tr>
</tbody>
</table>
## Tracking Onboarding Registration Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Vendor has not entered information on their registration.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Vendor has started entering information on the registration but has not submitted.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Vendor has submitted their registration.</td>
</tr>
<tr>
<td>Returned</td>
<td>The registration has been returned to the vendor in order for a correction to be made. The vendor will be emailed directly with the requested correction. They will also receive a message in their “Messages” tab.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The registration has been rejected.</td>
</tr>
<tr>
<td>Approved</td>
<td>The registration has been approved.</td>
</tr>
<tr>
<td>Processed (in Phase 2 only)</td>
<td>The registration has been processed and sent to your system of record.</td>
</tr>
<tr>
<td>Complete</td>
<td>The vendor has been notified of their approval, the vendor record has been created, and the vendor number has been issued. The vendor number will appear under “New Vendor Registration”.</td>
</tr>
</tbody>
</table>

### Online Help

- At the top right corner of your PaymentWorks screen, you can click on “Help”.
- Now if you scroll all the way down, on the bottom left you will see Initiator help section.
- You can also click on the video tutorial button on your onboarding screen.
Tracking Onboarding

- When you see the Vendor# under the New Vendor Registration column, this indicates the Vendor is available to use.

Troubleshooting

How will I know when the supplier is connected?

The initiator will receive an email from PaymentWorks when the integration process is completed, and a vendor number is assigned and can status on the onboardings screen.
Sample Initiator Confirmation

Will I get an email when a vendor is finally approved/setup?

Johnathan Rose has completed the registration process and now is set up in the ERP system.

The following vendor number has been assigned: 000002345

Vendor connected:
Company Legal Name - Rose, Johnathan
Company DBA - Johnathan Rose
Registration Submitted By - Johnny Rose

For more information about this or other invitations in PaymentWorks, please go to the "Onboarding" page in PaymentWorks.

Best regards,
PaymentWorks Support

Troubleshooting

*Error when sending Vendor invitation. “An invitation was previously sent to this email address”*

- PaymentWorks does not allow multiple invitations to be sent to a single email. Someone else may have previously sent the invite.
Troubleshooting

My vendor did not receive the invite

- Verify that the vendor has checked their spam folder.

Initiators have the ability to re-send an invitation. To resend invitation:
  - Click the status in the Invitation column.
  - At the bottom of the Invitation Details screen click “Resend Invitation” button.

Troubleshooting

Entered the wrong email address

Departments can correct and re-send invitations with the following invitation statuses: Sent, Delivered, Not Deliverable. To re-send invitation with the correct email address:
  - Click on the invitation status.
  - Then click on the “Resend Invitation” button.
  - Enter correct email address under “Contact E-Mail”
  - Click on the “Send” button when finished.
Troubleshooting

My vendor has not completed the forms

• The vendor will receive emails until the registration is completed or the reminders are cancelled.

• Reminder email notifications are automatically generated, do not re-send 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

Troubleshooting

I haven’t received my Vendor #

You will receive your Vendor # once the vendor has been approved and sent to the ERP
Troubleshooting

My vendor will no longer be used

• Click on the invitation status.
• Then you will want to click on the “Cancel Reminders” button.
• A confirmation screen will appear, click on the “OK” button.

Troubleshooting

• What is the recommended browser to use?
  • Chrome
Questions?

Contacts:
Pam Muscarello, 713-743-3515, pmuscarello@uh.edu
Cissy Bean, 713-743-8711, mlbean@central.uh.edu

Additional Resources:
https://uh.edu/office-of-finance/ap-general/

PaymentWorks
- Initiator Video (an introduction to the initiator role)
- Initiator Handbook
- Initiator Training
- PaymentWorks Vendor Registration Supplemental Form