

How to Set Up a Vendor in PW

For Texas State Employee Use
Email VendorRequests@txstate.edu for additional help!



The rising STAR of Texas

How to Set Up a Vendor in PaymentWorks

- ❖ Go to Vendor Self-Service Website
<https://www.txstate.edu/procurement/resources/VENDOR-Self-Service.html>

- ❖ Click employee PW link

PaymentWorks

Employee Internal Log In

- ❖ Log in



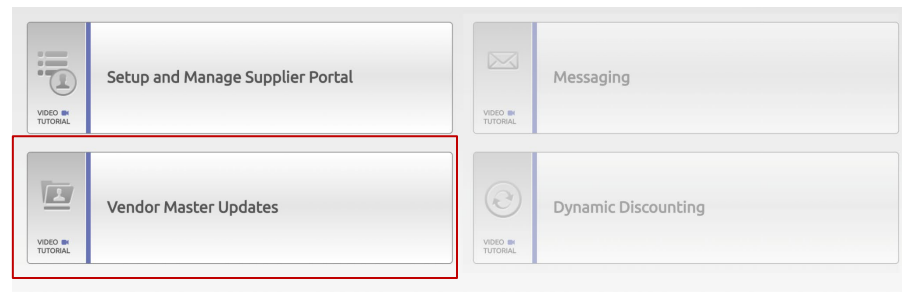
TEXAS STATE

NetID [Forgot your password?](#)

Password [Activate your NetID](#)

Use of computer and network facilities owned or operated by Texas State University requires prior authorization. Unauthorized access is prohibited. Usage may be subject to security testing and monitoring, and affords no privacy guarantees or expectations except as otherwise provided by applicable privacy laws. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University.

- ❖ Click Vendor Master Update



Setup and Manage Supplier Portal

Messaging

Vendor Master Updates

Dynamic Discounting

- ❖ Make sure SHOW is on Onboardings

SHOW: Onboardings

- ❖ Click Send Invitation

- ❖ Complete Invite information & click SEND

The screenshot shows a web application interface for 'New Vendors'. At the top, there are navigation tabs for 'Home' and 'New Vendors'. Below the navigation, there is a dropdown menu labeled 'SHOW: Onboardings'. To the right of this menu is a 'VIDEO TUTORIAL' link. Below the dropdown is a 'Filter Results:' section with several search and filter fields: 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', 'Source', and 'Invitation Initiator'. A 'Clear Filters' button is located below these fields. At the bottom of the filter section, there is a 'Send Invitation' button, which is highlighted with a red box. The main content area on the right shows a table with columns for 'ONBOARD START', 'UPDATED', and 'VENDOR NAME'.

The screenshot shows a form titled 'Invite New Vendor'. The form contains several input fields: 'Company/Individual Name*', 'Contact E-Mail*', 'Verify Contact E-Mail*', 'Is this invitation to an individual or entity?*' (with a dropdown menu showing '- Choose One -'), and 'Description of Products/Services:'. A legend at the bottom left indicates that fields with an asterisk are 'Required Field'. At the bottom right, there are two buttons: 'Cancel' and 'Send'.

Vendor Invite Status

- ❖ SHOW: Onboardings shows invite status

The screenshot shows a web interface for managing vendor invites. At the top, there are navigation buttons for 'Home' and 'New Vendors'. Below this, a 'SHOW:' dropdown menu is set to 'Onboardings'. A 'VIDEO TUTORIAL' button is also visible. On the left side, there is a 'Filter Results:' section with several search fields: Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. The main area contains a table with the following data:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
12/03/2018	12/03/2018	Student ABC	Delivered	No Account	Not Started	<div style="width: 25%; background-color: green; height: 10px;"></div>

- ❖ You can search for only your invites, by adding your Net ID in Invitation Initiator box at the bottom of the Filter Results:

Invitation Initiator:

Vendor receives email



Dear <SUPPLIER NAME>

In order for Texas State University to establish you or your company as a payee or vendor, please [click here](#) to register on PaymentWorks, Texas State University's supplier portal.

Ashley Watson has invited you to register as a new vendor to Texas State University.

Your personalized message to the vendor will go here

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.

Additional information about the Texas State payee/vendor requirements can be found [here](#).

If you have any questions, please do not hesitate to reach out to support@paymentworks.com.

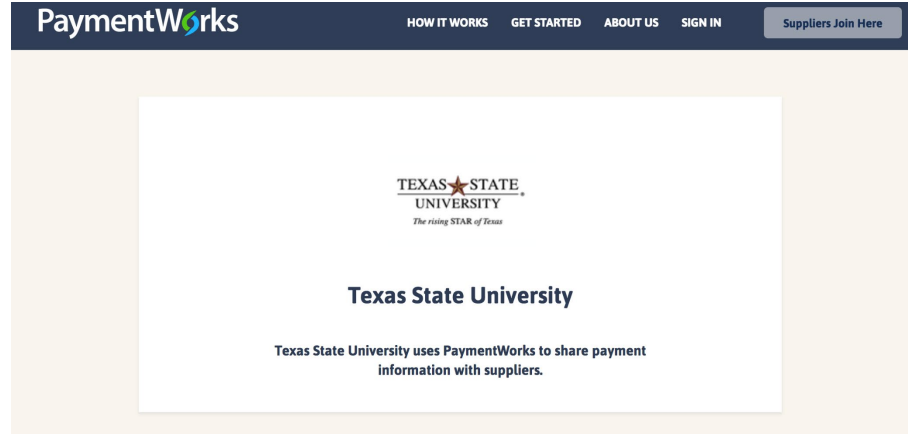
Thank you for your support.

Sincerely,

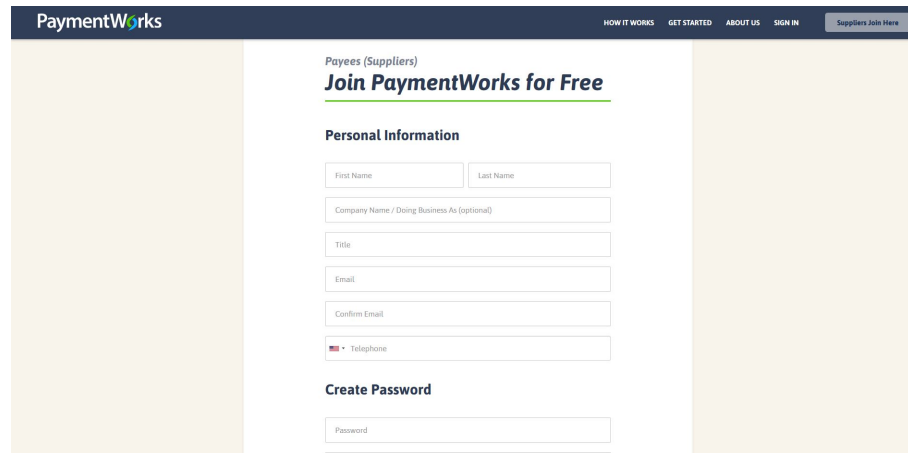
Texas State University



- ❖ When Vendor clicks link in invitation email, [click here](#) it takes them to PW log in page where they click Suppliers Join Here



- ❖ It takes them to Join PW to create account



- ❖ Vendor will receive an email to validate their email.

Thanks for registering!

Verify your email within the next 72 hours to activate your account.

[Verify Your Email](#)

Thank you,
PaymentWorks

PaymentWorks

If this was sent to you in error, please ignore this email and your address will be removed from our records.

- ❖ Once validated, they will log into www.paymentworks.com, complete online registration form and SUBMIT.
- ❖ Let vendor know someone from PW may call to validate the LAST FOUR of their bank account number. If left a message, they need to return the call as this is the last step in the process.

Tracking Onboardings

Home New Vendors

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
04/22/2018	04/22/2018	Ashley Watson Laundry	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>

Invitation column:

- Sent
- Delivered
- Not Deliverable
- Opened
- Clicked
- Self Registered

Account Column:

- Email Validated
- Created
- Confirmed
- No Account

New Vendor Registration column:

- Submitted
- Approved
- Processed
- Complete
- Rejected
- Invitation/Reminders Cancelled

Important Notes for Foreign Vendors

- ❖ Foreign vendors can't receive ACH payments, if vendor selects Direct Deposit in error, they are unable to add wire information that is needed. Just an FYI so you know it will delay the registration process.
- ❖ If Foreign vendors answer **NO** to the question *Does your bank accept US checks*, it will prompt them to add wire transfer information.
AND select US Dollar as wire currency.

Wire Currency	United States Dollar (USD)
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- ❖ If Foreign vendors answer **Yes** to the question *Does your bank accept US checks*, they will be set up with Check as their payment method.
- ❖ The approval process takes longer for Foreign Vendors so plan accordingly.

Additional Comments

- ❖ Please email VendorRequests@txstate.edu with **ANY** questions you have. Easier to answer lots of emails then fix problems later. 😊
- ❖ If a vendor sits in APPROVED status for over 24 hours, PW & SAP may not have 'connected' correctly. Vendor should be in SAP.
- ❖ With other Universities using PW now, it's important to send email invite to the correct person so they can have one account with everyone. Also, it is best if a generic email is used.
- ❖ Bank validation is a critical part of the PW process. Registrations will be kicked back if PW is not able to reach them to validate the LAST FOUR of their bank account number. This is to protect both us and the vendor.