

# How to Update Existing Vendor

*For Texas State Employee Use*  
Email [VendorRequests@txstate.edu](mailto:VendorRequests@txstate.edu) for additional help!



*The rising STAR of Texas*

# Things to know before you start

- ❖ First, search comments line in SAP and see if there is a PW next to date. This will determine which steps are taken next.

Comments

9/11/19 PW

## If PW is listed on SAP Comments line

- ❖ Vendor can log into their account at [www.paymentworks.com](http://www.paymentworks.com) to update their information.
- ❖ There's a *Forgot Password* link if needed.  
If email listed in SAP is not working as their log in email, send email to [vendorrequests@txstate.edu](mailto:vendorrequests@txstate.edu) and I can look up how the account was set up originally.
- ❖ Vendors must create a NEW PW account if their tax number changes, tax numbers can't be updated in PW on their existing account for tax reporting purposes.
- ❖ If employee no longer works there, they must contact [support@paymentworks.com](mailto:support@paymentworks.com) for the steps to change log in on account. (However, if their IT folks have access to old account, email [vendorrequests@txstate.edu](mailto:vendorrequests@txstate.edu) and we can bypass many extra steps.)
- ❖ Vendors can also contact PW to add additional users to their account.

## If PW is NOT listed on SAP Comments line

- ❖ First, make sure vendor is not in PaymentWorks (PW) by searching comments line in SAP. If the date line does not contain PW, then please follow these steps.

Comments

4/20/16

- ❖ If vendor is in PW with another University. Send email invite to THAT email address. When completed, it will be tied to SAP by their tax number.
- ❖ The email they set up as their primary email will be their log in for PW. It is recommended they use a generic email for this purpose. (i.e., accounting@, sales@, etc.)
- ❖ There is only one email address for each account set up in PW. If vendor changes tax number, they will need to set up new account in PW.
- ❖ Remind vendor to complete the *Description of Products/Services* section.
- ❖ Personalized Message section – here's a basic example, feel free to edit for your purposes.  
*Please create your online account to update your vendor information for Texas State University.*



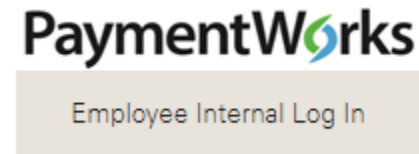
# How to Update an Existing Vendor Not in PW

- ❖ First, make sure vendor is not in PaymentWorks (PW) by searching comments line in SAP. If the date line does not contain PW, then please follow these steps.

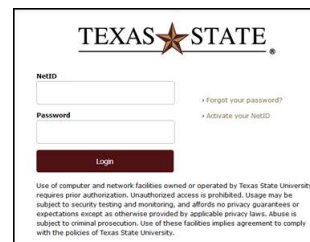
Comments 4/20/16

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

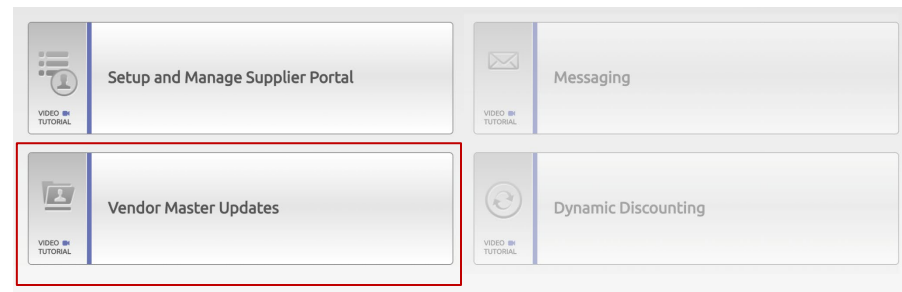
- ❖ Click Employee Internal Log In link



- ❖ Log in

The image shows the Texas State login page. At the top is the "TEXAS STATE" logo with a star. Below it are two input fields: "NetID" and "Password". To the right of the "Password" field are two links: "Forgot your password?" and "Activate your NetID". Below the input fields is a red "Login" button. At the bottom of the form is a disclaimer: "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, rules or subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University."

- ❖ Click Vendor Master Update



- ❖ Make sure SHOW is on Onboardings

SHOW: Onboardings →

- ❖ Click Send Invitation

- ❖ Complete Invite information & click SEND

Home New Vendors

SHOW: Onboardings

VIDEO TUTORIAL ONBOARD START

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

Invite New Vendor

Company/Individual Name:

Contact E-Mail:

Verify Contact E-Mail:

Is this invitation to an individual or entity?:  
- Choose One -

Description of Products/Services:

\*Required Field

Cancel Send

# Vendor Invite Status

- ❖ SHOW: Onboardings shows invite status

The screenshot shows a web interface for 'New Vendors'. At the top, there are navigation buttons for 'Home' and 'New Vendors'. Below this, a 'SHOW:' dropdown menu is set to 'Onboardings'. On the left side, there is a 'Filter Results:' section with several input fields: Vendor Name, Vendor #, Contact E-Mail, Invitation Approval, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. A 'VIDEO TUTORIAL' button is also present. 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: 20%; height: 10px; background-color: green;"></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:

# 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:**

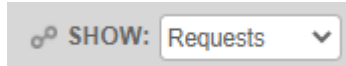
- Email Validated
- Created
- Confirmed
- No Account

**New Vendor Registration column:**

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

# Tracking Onboardings

- ❖ If PW says SUBMITTED, then registration is in the approval process on Texas State side.
- ❖ If PW says APPROVED, then registration is waiting to roll into SAP. This connection happens every few hours, so if you see it as approved for more than that, you can check SAP and it should be there. (email [vendorrequests@txstate.edu](mailto:vendorrequests@txstate.edu) and I can help, sometimes connections aren't automatic)
- ❖ If PW says COMPLETE, then you should see a vendor number.
- ❖ If you search SHOW: Requests and your vendor file says RETURNED



HurryBack Catering,  
LLC

Jan 19, 2021 9:29 PM

Request Status:

**Returned**

[View Message](#)

Request Type: **Full**

Email [vendorrequests@txstate.edu](mailto:vendorrequests@txstate.edu) and I can let you know why it was returned.

- ❖ Every so often, you should search your invites sent and see what is still pending. Let me know how I can help.



# 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](#).

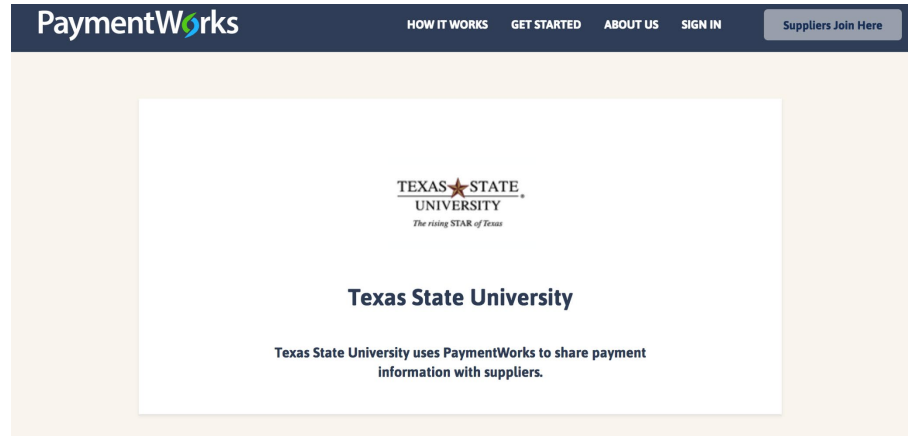
If you have any questions, please do not hesitate to reach out to [support@paymentworks.com](mailto:support@paymentworks.com).

Thank you for your support.

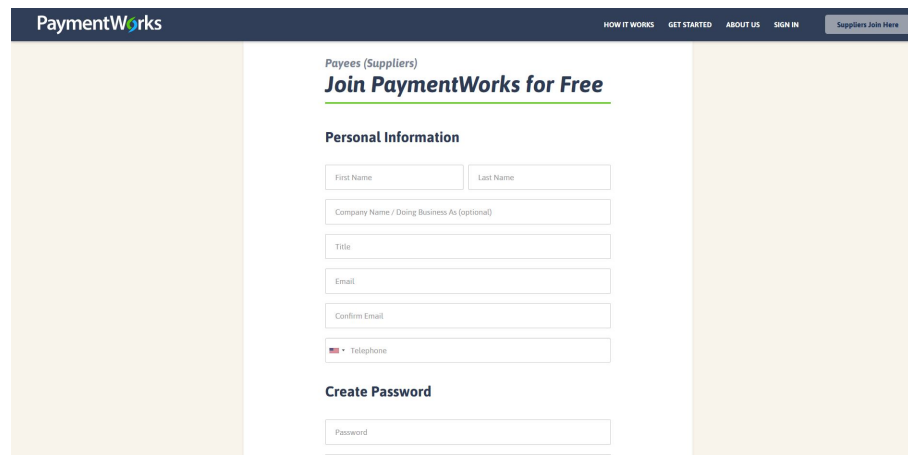
Sincerely,

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](http://www.paymentworks.com), complete online registration form and SUBMIT.

## 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)
---------------	----------------------------
- ❖ 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](mailto:VendorRequests@txstate.edu) with **ANY** questions you have. Easier to answer lots of emails then fix problems later. 😊
- ❖ After the approval process is completed, PaymentWorks will tie to SAP by tax number and updated information in SAP.
- ❖ When updated in SAP, date and PW are added to comments line showing update is complete.

Comments 9/11/19 PW

- ❖ If a new vendor number is created and not blocked, please email [VendorRequests@txstate.edu](mailto:VendorRequests@txstate.edu) to block the old vendor number.
- ❖ 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.
- ❖ Again... Please email [VendorRequests@txstate.edu](mailto:VendorRequests@txstate.edu) with **ANY** questions you have.