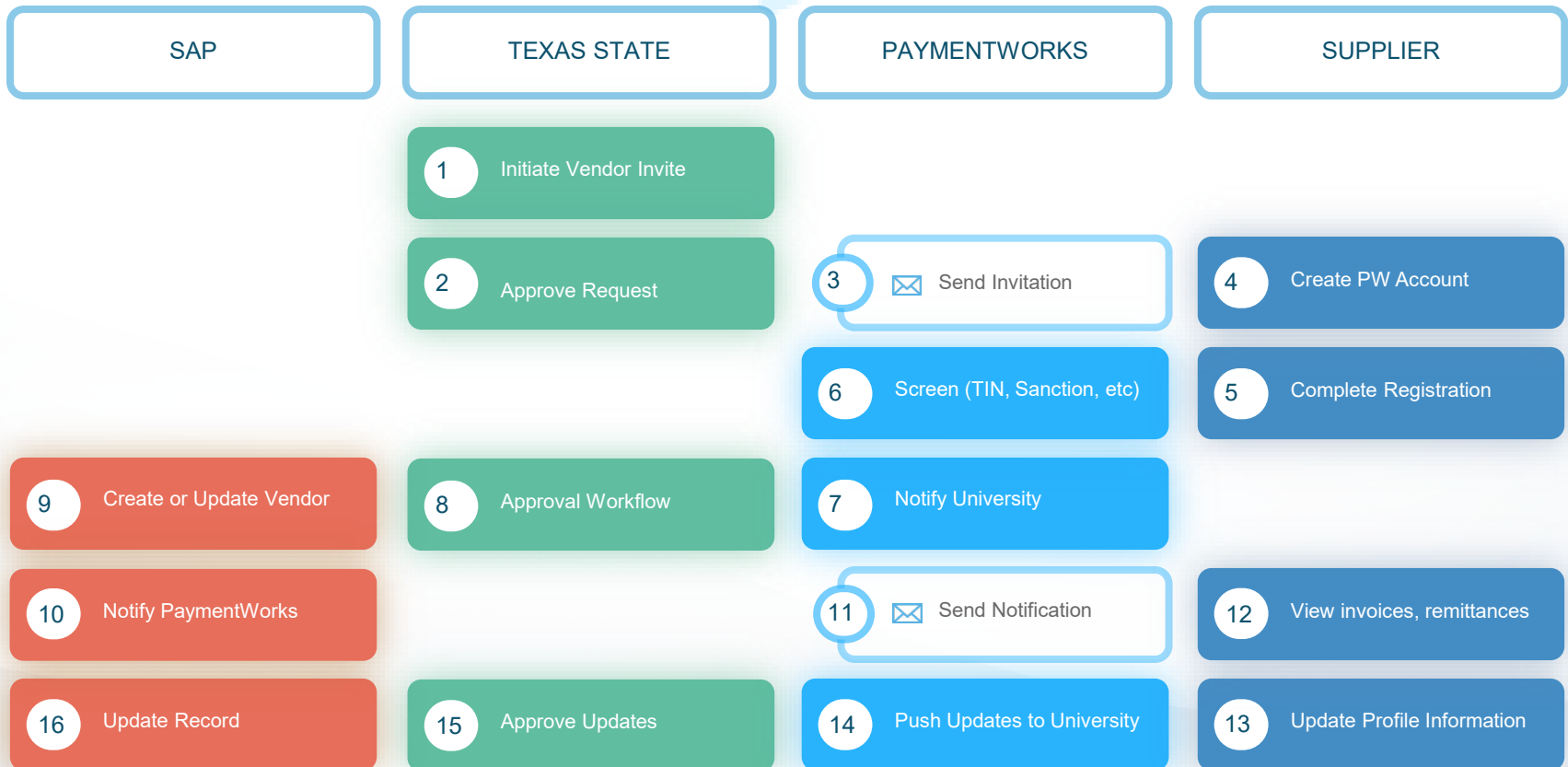




User Guide Vendor Self-Service (PaymentWorks)

Onboarding Process



Go to Vendor Self-Service Website and click the Payment Works Link

<https://www.txstate.edu/gao/procurement/resources/VENDOR-Self-Service.html>



Vendor Self-Service

Links to:

[PaymentWorks Initiator Guide](#)

PaymentWorks



Logging In



TEXAS  STATE[®]

NetID

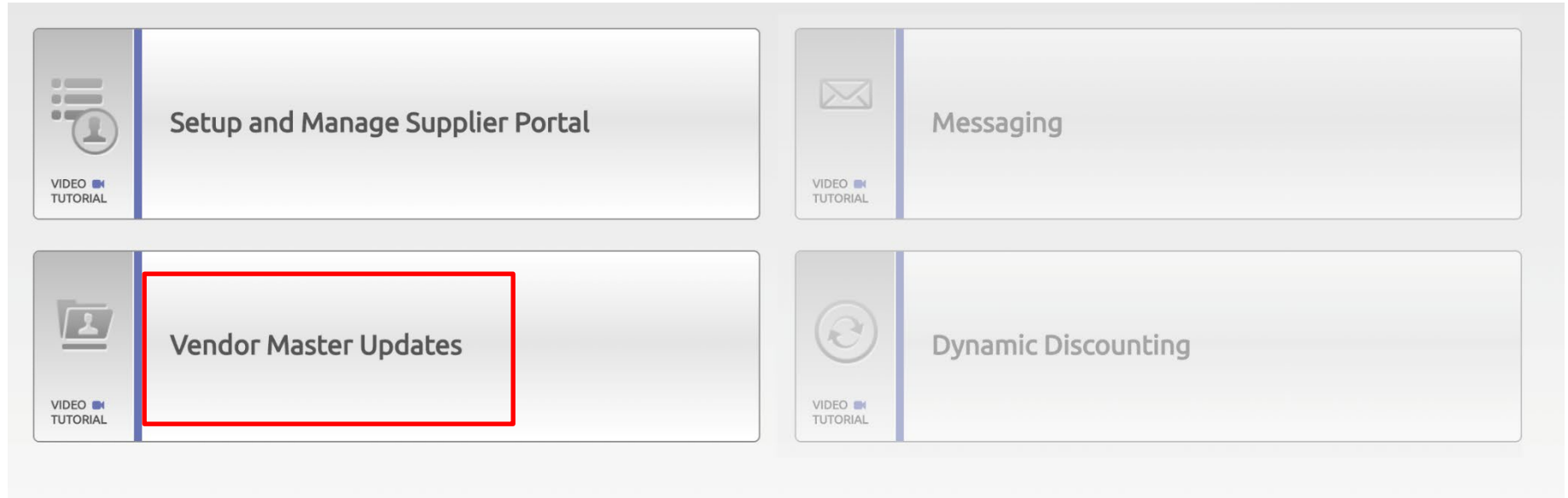
Password

Login

[» Forgot your 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.


Inviting a Payee



Inviting a Payee

[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
---------------	-----------	-------------	------------	----------------	-------------------------	------------

Inviting a Payee

 **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

 **Invite New Vendor**

Verify Contact E-Mail:*

Is this invitation to an individual or entity?:*

- Choose One -

Description of Products/Services:

Reason for Supplier Registration:*

- Choose One -

*Required Field

Cancel

Send

Invite Status

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
12/03/2018	12/03/2018	Student ABC	Delivered	No Account	Not Started	<div></div>

Payee Process Overview



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

Payee Process Overview

PaymentWorks

[HOW IT WORKS](#)

[GET STARTED](#)

[ABOUT US](#)

[SIGN IN](#)

[Suppliers Join Here](#)



Texas State University

Texas State University uses PaymentWorks to share payment information with suppliers.

Payee Process Overview

Payees (Suppliers)

Join PaymentWorks for Free

Personal Information

Create Password

Payee Process Overview

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.

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></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

[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
12/03/2018	12/04/2018	Student ABC	Clicked	Email Validated	Complete Vendor #: 0000148469	<div></div>

The is now open and available for use

Invite Statuses

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
12/05/2018	12/05/2018	Test Vendor 1	Pending Approval	No Account	Not Started	<div></div>
11/05/2018	11/08/2018	Michael Giuffre Student US	Clicked	Email Validated	In Progress	<div></div>
11/05/2018	11/08/2018	Michael Giuffre Student Foreign	Clicked	Email Validated	Not Started	<div></div>
11/07/2018	11/08/2018	Konica Minolta	Clicked	Email Validated	In Progress	<div></div>
11/08/2018	11/08/2018	Insight Direct USA	Sent	No Account	Not Started	<div></div>
11/02/2018	11/06/2018	FL Technical	Clicked	Email Validated	Complete Vendor #: 0000150525	<div></div>
10/31/2018	11/06/2018	Digitas	Cancelled	No Account	Not Started	<div></div>
11/05/2018	11/06/2018	Henry Schein	Sent	No Account	Not Started	<div></div>
10/25/2018	11/05/2018	Ahead LLC	Clicked	Email Validated	Processed	<div></div>
11/01/2018	11/05/2018	Spalding	Clicked	Email Validated	Not Started	<div></div>
11/01/2018	11/05/2018	Michael Giuffre	Clicked	Email Validated	Not Started	<div></div>
11/01/2018	11/01/2018	Spalding	Cancelled	No Account	Not Started	<div></div>
					Complete	<div></div>

Search for a Payee

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

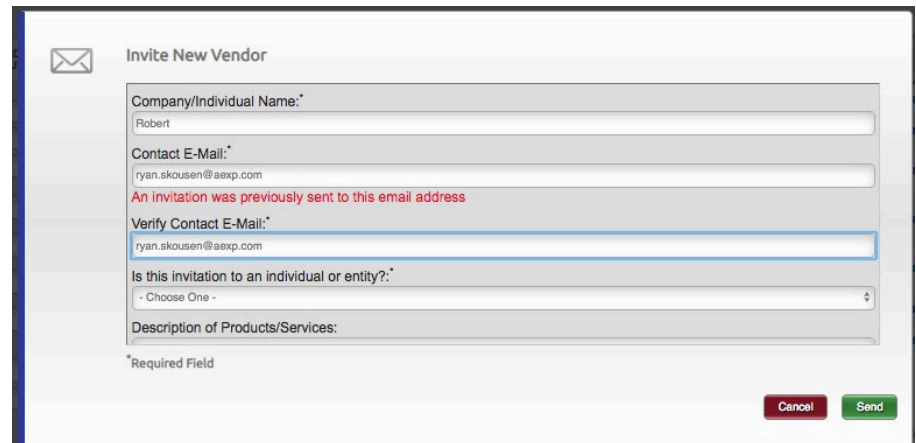
ONBOARD START	UPDATED ▾	VENDOR NAME
11/30/2018	12/05/2018	Archibald Print Shop
11/19/2018	12/05/2018	Kristen Buckley
10/12/2018	12/04/2018	C&W Facility Services Inc
12/03/2018	12/04/2018	Student ABC
11/07/2018	12/03/2018	Carli Fence
10/11/2018	12/01/2018	Michael Giuffre 5
10/12/2018	12/01/2018	Michael Giuffre 8
10/11/2018	12/01/2018	Michael Giuffre
11/08/2018	11/30/2018	Konica Minolta
11/29/2018	11/29/2018	Ivoclar


- Use the search on the Onboardings page and enter the payee's email address.
- This will bring up the request and you can provide the status of the request. If the request has been completed, you can provide the payee ID.

Note: Initiators will only be able to search/view the invitations that they have sent.

Troubleshooting – I cannot send the invite. “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.



 Invite New Vendor

Company/Individual Name:*
Robert

Contact E-Mail:*
ryan.skousen@aexp.com
An invitation was previously sent to this email address

Verify Contact E-Mail:*
ryan.skousen@aexp.com

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

Description of Products/Services:

*Required Field

Cancel Send

Troubleshooting – My payee did not receive the invite

- Verify that the payee has checked their spam folder
- Initiators have the ability to re-send an invitation

Home

Vendor Profiles

Updates

New Vendors

Reimbursements

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
12/05/2018	12/05/2018	Test Vendor 1	Pending Approval	No Account	Not Started	
11/05/2018	11/08/2018	Michael Giuffre Student US	Clicked	Email Validated	In Progress	
11/05/2018	11/08/2018	Michael Giuffre Student Foreign	Clicked	Email Validated	Not Started	
11/07/2018	11/08/2018	Konica Minolta	Clicked	Email Validated	In Progress	
11/08/2018	11/08/2018	Insight Direct USA	Sent	No Account	Not Started	
11/02/2018	11/06/2018	FL Technical	Clicked	Email Validated	Complete Vendor #: 0000150525	
10/31/2018	11/06/2018	Digitas	Cancelled	No Account	Not Started	

close

Invitation Details:

Initiator:
Emily Libby (emily.libby+demo@paymentworks.com)

Vendor Name:
Flowers by Marie

Contact E-mail:
emily.libby+louisiana@paymentworks.com

Initiated:
01/22/2019

Email Sent:
01/22/2019

Personalized Message:
Looking forward to working with you, Marie!

Custom Fields:
Vendor Type : PO

Cancel Reminders

Resend Invitation

Troubleshooting – I entered the wrong email address

- Departments can correct and re-send invitations with the following invitation statuses: Sent, Delivered, Not Deliverable
- By clicking on the invitation status, you will be given action options: Cancel Reminders, Resend Invitations


close X

Invitation Details:

Initiator: Emily Libby (emily.libby+demo@paymentworks.com)	Vendor Name: Flowers by Marie	Contact E-mail: emily.libby+louisiana@paymentworks.com	Initiated: 01/22/2019	Email Sent: 01/22/2019
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Personalized Message:
Looking forward to working with you, Marie!

Custom Fields:
Vendor Type : PO



Resend New Vendor Invitation

Company/Individual Name:
Texas Ski Ranch

Contact E-Mail:
andrew@texasskiranch.com

Verify Contact E-Mail:
andrew@texasskiranch.com

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

Description of Products/Services:

*Required Field

Cancel

Send

Cancel Reminders

Resend Invitation

Troubleshooting – My payee has not completed the forms

- The payee will receive emails until the registration is completed or the reminders are cancelled

Note: Reminder email notifications are automatically generated, do not re-send invitations unless the payee notifies you that they did not receive the initial email

- 1st reminder – three days
- 2nd reminder – seven days
- 3rd reminder – 14 days

Invitation Details: close ✕

Initiator: Emily Libby (emily.libby+demo@paymentworks.com)	Vendor Name: Flowers by Marie	Contact E-mail: emily.libby+louisiana@paymentworks.com	Initiated: 01/22/2019	Email Sent: 01/22/2019
--	---	--	---------------------------------	----------------------------------

Personalized Message:
Looking forward to working with you, Marie!

Custom Fields:
Vendor Type : PO

Cancel Reminders ↻ Resend Invitation ↻

Troubleshooting – I haven't gotten my ID

- You will receive your payee ID once the payee has been approved and sent to the ERP

SHOW: Onboardings							
VIDEO TUTORIAL		ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION
Filter Results:							
Vendor Name:		12/03/2018	12/05/2018	Student ABC	Clicked	Email Validated	Complete Vendor #: 0000148469
Vendor #:		11/30/2018	12/05/2018	Archibald Print Shop	Clicked	Email Validated	Complete Vendor #: 0000150531
Contact E-Mail:		10/12/2018	12/04/2018	C&W Facility Services Inc	Clicked	Email Validated	Complete Vendor #: 0000101848
Invitation Approval:		11/08/2018	11/30/2018	Konica Minolta	Clicked	Email Validated	Complete Vendor #: 0000150530
Invitation Delivered:		11/29/2018	11/29/2018	Ivoclar	Clicked	Email Validated	Complete Vendor #: 0000001164
Account Created:							
Registration Complete:							

Troubleshooting – My payee will no longer be used

Invitation Details:

close ✕

Initiator:
Shawn McCarthy (shawn.mccarthy@paymentworks.com)

Vendor Name:
Shawn McCarthy

Contact E-mail:
pawodemo+Inv@gmail.com

Initiated:
04/19/2018

Email Sent:
04/19/2018

Custom Fields:

Vendor Type : PO

Cancel Reminders ✕

Resend Invitation ↺

04/19/2018	10/18/2018	Shawn McCarthy	Cancelled	No Account	Not Started	
------------	------------	----------------	-----------	------------	-------------	--

Resources

Departmental questions for vendor onboarding can be sent to:

- vendorrequests@txstate.edu
- Phone: 512-245-2521

PaymentWorks Platform and supplier questions can be sent to:

- support@paymentworks.com

PaymentWorks Initiator Documentation:

- [Sending and Tracking Invitations](#)
- [YouTube video for Initiators](#)

Resources

PaymentWorks

Ashley Watson,
Texas State University

Help

Account

Logout

My Cases

Support Center

Have a Question? Ask or enter a search term here.

SEARCH

Browse by Topic

Setup and Administration

14 ARTICLES

VIEW ALL

- Setup and Administration Overview
- Mapping Your Internal Invoice Status Cod...
- Supplier Upload File Format
- Invoice Upload File Format
- Automating Upload of Supplier & Invo...

Messaging

3 ARTICLES

VIEW ALL

- Messaging Overview
- Messaging
- Sending News Update To Suppliers

Vendor Master Updates

6 ARTICLES

VIEW ALL

- Vendor Master Updates Overview
- Vendor Profile Information
- Vendor Master Updates
- Vendor Master Updates Integration
- New Vendor Requests Integration

Dynamic Discounting

4 ARTICLES

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- Dynamic Discounting Overview
- Setting Up Your Dynamic Discounting Prog...
- Confirming Accepted Discounted Early Pay...
- Extracting Dynamic Discount Offers From ...

SFTP Access

1 ARTICLE

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- Getting Started with SFTP

For Initiators

4 ARTICLES

VIEW ALL

- Creating an Initiator Account
- Onboarding New Vendors
- What Will My Supplier See?
- Initiator Video

Contact Us

- Email Us

SHOW: Onboardings

VIDEO TUTORIAL

	ONBOARD START	UPDA
Filter Results:		
Vendor Name:		01/23/2019
Vendor #:		10/04/2018
Contact E Mail:		01/22/

Approval Notification

- Notifications occur once a day
- Types:
 - Invitation
 - Registration
 - Vendor Update

You have a Pending [Invitation] Approval in PaymentWorks

A new vendor invitation has been submitted by <INITIATOR_NAME> and requires approval before it can be sent. You are one of the prospective approvers for this invitation.

To review and approve the invitation, please go to the PaymentWorks Onboarding view (https://www.paymentworks.com/app/new_vendors/onboardings/p/1/s/modified/o/1).

Best regards,

PaymentWorks Support

Approvers

Home

Vendor Profiles

Updates

New Vendors

Reimbursements

SHOW: Requests

Sort By: Last Updated

Descending

Mark All Approved Requests as Processed

Need help?

Filter Results:

Supplier Name:

Submitted within: All Dates

Request Status: Show All

Request Type: Show All

Resubmitted Only:

My Pending Approvals Only:

ID:

Clear Filters

CSV

Do Not Use Vendor Jan 24, 2019 12:02 PM Request Status: Approved	Request Type: Partial
Do Not Use Vendor Jan 23, 2019 1:21 PM Request Status: Connected	Request Type: Full
Avis Budget Group, Inc. Jan 14, 2019 12:15 PM Request Status: Pending	Request Type: Full Pending Approvers: Procurement/Vendor Maintenance
Follett Higher Education Group Dec 7, 2018 7:58 AM Request Status: Approved	Request Type: Full
Hertz Corporation Dec 5, 2018 3:17 PM Request Status: Approved	Request Type: Full

Approvers

Validation File:

[Click to Download](#)

Email address for payment
notifications:

remittanceprocessing@avisbudget.com

Reject

Approve

Return to Vendor

Invitation Approvals

Approvals for sending invitation has been enabled for Texas State. This means that all invitations will require approval before being sent out.

For example, if the invitation is to an entity, sending approval is required from someone in the **P&SS** role, as shown below.

Invitation Approval Step 1				
RULE	APPROVER	EDIT	DELETE	
Is this invitation to an individual or entity? equals Entity	Buyer			
 Add Approver...		Step Approver If No Rules Match: <i>None</i> 		

Vendor Update Approvals

- Updates submitted by Texas State suppliers must be approved before they are sent to SAP. Approval on all Vendor Updates is required by someone in Procurement/Vendor Maintenance role.
- In cases where a supplier changes information related to their bank account, a second approval by someone in the **P&SS** role is required *prior* to Procurement/Vendor Maintenance approval.

Update Approval Step 1

RULE

APPROVER

EDIT

DELETE

Update Group equals Bank Account

Bank Confirmation





 Add Approver...

Step Approver If No Rules Match: *None* 

Update Approval Step 2

RULE

APPROVER

EDIT

DELETE

Approval Always Required

Procurement/Vendor Maintenance





 Add Approver...

Step Approver If No Rules Match: *None* 

Registration Approvals

- When registrations are received by Texas State, they may require up to four approvals before the status of the registration will be changed to **Approved**.
 - Foreign vendors in particular will be reviewed and approved in three steps:
 - First, the registration must be approved by members of the Payroll & Tax Compliance and Research Integrity and Compliance roles.

Registration Approval Step 1 ✕			
RULE	APPROVER	EDIT	DELETE
Are you or your company based outside of the United States? equals Yes	Payroll and Tax Compliance		
Are you or your company based outside of the United States? equals Yes	Research Integrity and Compliance		
+ Add Approver...		Step Approver If No Rules Match: <i>None</i> 	

Registration Approvals, cont.

- Second, the registration must be approved by someone to whom the IT role is assigned.
- Finally, as with all registrations, it must be approved someone in Procurement/Vendor Maintenance role.

Registration Approval Step 2			
RULE	APPROVER	EDIT	DELETE
Are you or your company based outside of the United States? equals Yes	IT		
Are you or your company based outside of the United States? equals Yes	IT		
 Add Approver...		Step Approver If No Rules Match: <i>None</i> 	

Registration Approval Step 3			
RULE	APPROVER	EDIT	DELETE
Approval Always Required	Procurement/Vendor Maintenance		
 Add Approver...		Step Approver If No Rules Match: <i>None</i> 	