How to Set Up a Vendor in PW

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

- Log in

- Click Vendor Master Update
- Make sure SHOW is on Onboardings
  SHOW: Onboardings

- Click Send Invitation

- Complete Invite information & click SEND
Vendor Invite Status

- SHOW: Onboardings shows invite status

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

<table>
<thead>
<tr>
<th>ONBOARD START</th>
<th>UPDATED</th>
<th>VENDOR NAME</th>
<th>INVITATION</th>
<th>VENDOR ACCOUNT</th>
<th>NEW VENDOR REGISTRATION</th>
<th>% COMPLETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/22/2018</td>
<td>04/22/18</td>
<td>Ashley Watson</td>
<td>Clicked</td>
<td>Email Validated</td>
<td>In Progress</td>
<td></td>
</tr>
</tbody>
</table>

**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.

- 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.