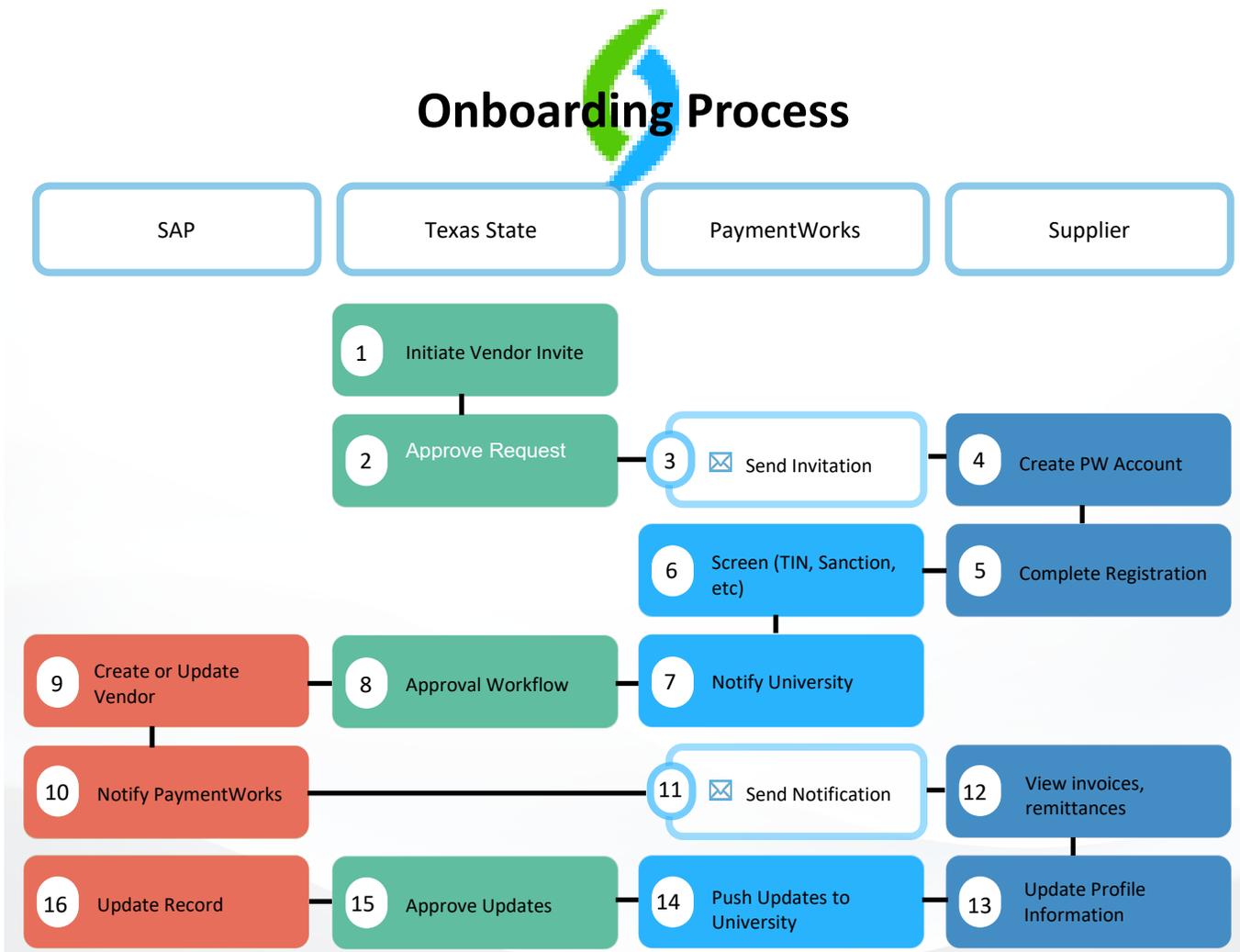


Vendor Self-Service Portal (PaymentWorks)

PaymentWorks is the electronic replacement for the paper FS-01 Vendor Request form. If a vendor is not set up in SAP a representative of the University will send an invitation to the vendor via the PaymentWorks portal. The vendor will then create an account and enter their information. This is then electronically sent to the office of Procurement and Strategic Sourcing for approval and migration into SAP. If an existing vendor needs to make changes to their profile, they will log into PaymentWorks and make the changes. If they have not set up an account, an invitation will need to be sent by a representative of the University.

Onboarding Process



**If you have questions, contact the
Purchasing Office at (512) 245-2521.**

Vendor Self-Service Portal (PaymentWorks)

Step 1: On the Purchasing Office website, click on the **FORMS** tab.

Step 2: Scroll down to the **Vendor Maintenance** section and click on the **Vendor Self Service** link.

Step 3: Click on PaymentWorks to access the portal.

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



Vendor Self-Service

University Supplier Links to:

[Supplier Reference Guide - New Vendor Registration](#)

[Supplier Reference Guide - Updating Your Company Profile](#)

PaymentWorks

Supplier Log In

University Employee Links to:

[Employee Reference Guide - How To Invite A Supplier](#)

[Employee Quick Reference Guide](#)

PaymentWorks

Employee Internal Log In

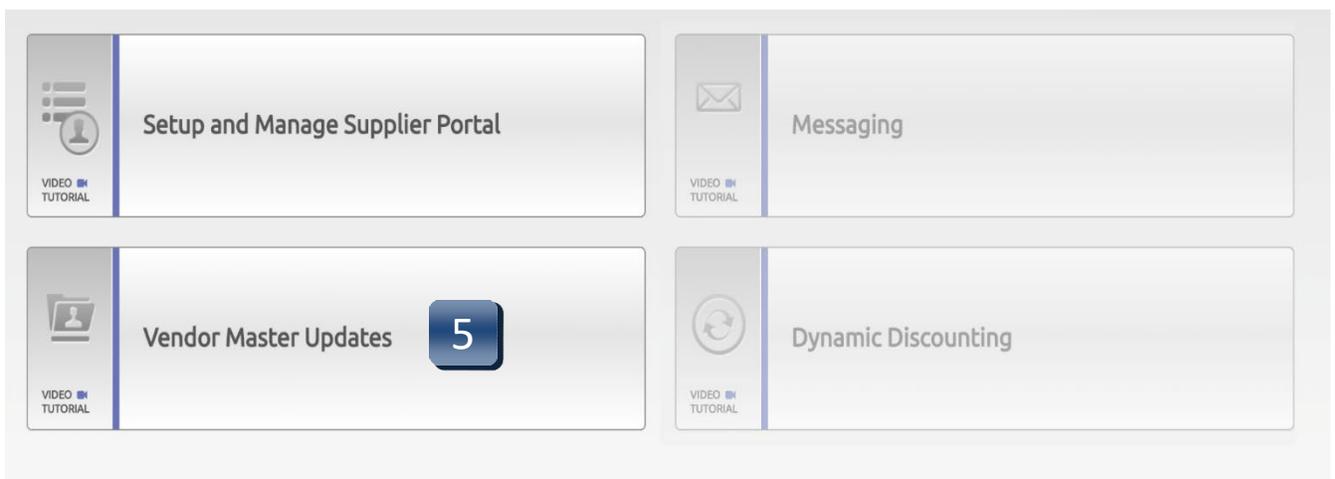
Vendor Self-Service Portal (PaymentWorks)

Step 4: Log into the system.

Step 5: Inviting a Vendor. Click on Vendor Master Updates to access the onboarding screen.



The image shows the Texas State University NetID login page. At the top is the Texas State logo. Below it are two input fields: "NetID" and "Password". To the right of the NetID field is a blue button with the number "4" and a link "Forgot your password?". Below the Password field is a link "Activate your NetID". A dark red "Login" button is positioned below the input fields. At the bottom of the page 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. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University."



The image shows a navigation menu with four items, each with a "VIDEO TUTORIAL" icon on the left:

- Setup and Manage Supplier Portal**
- Messaging**
- Vendor Master Updates** (highlighted with a blue button containing the number "5")
- Dynamic Discounting**

Vendor Self-Service Portal (PaymentWorks)

Step 6: Click **Send Invitation** to access the invitation request form

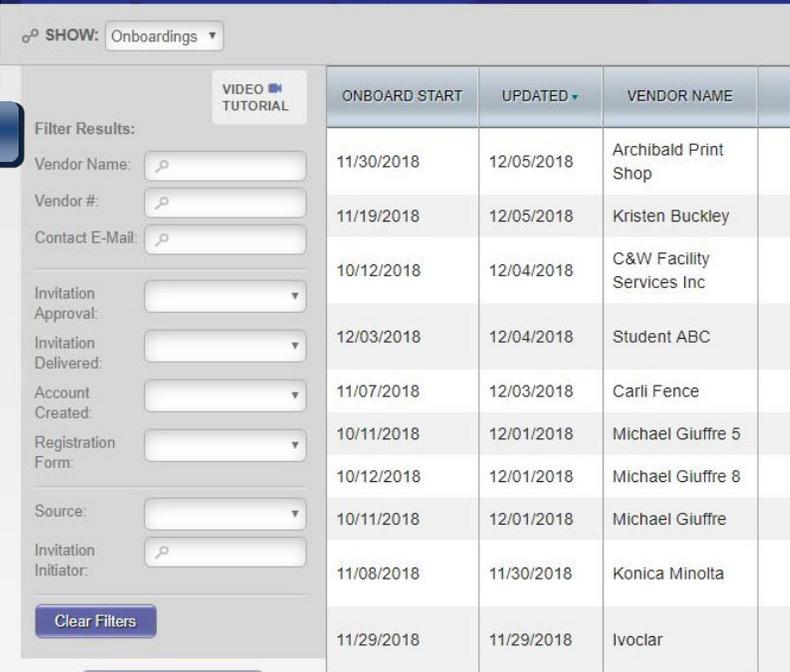
Step 7: Complete the vendor information. Click on the **Send** button.

The screenshot shows the 'New Vendors' section of the Vendor Self-Service Portal. The interface includes a navigation bar with 'Home' and 'New Vendors' links. Below the navigation bar, there is a 'SHOW: Onboardings' dropdown menu. The main content area is divided into a left sidebar with filter options and a main table area. The filter options include 'Vendor Name', 'Vendor #', 'Contact E-Mail', 'Invitation Approval', 'Invitation Delivered', 'Account Created', 'Registration Form', 'Source', and 'Invitation Initiator'. A 'Clear Filters' button is located at the bottom of the filter sidebar. The main table area has columns for 'ONBOARD START', 'UPDATED', 'VENDOR NAME', 'INVITATION', 'VENDOR ACCOUNT', 'NEW VENDOR REGISTRATION', and '% COMPLETE'. A blue box with the number 6 highlights the 'Send Invitation...' button located at the bottom left of the main content area.

The screenshot shows the 'Invite New Vendor' form. The form is titled 'Invite New Vendor' and includes an envelope icon. The form fields are: '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 -'), 'Description of Products/Services:', and 'Reason for Supplier Registration:*' (with a dropdown menu showing '- Choose One -'). A legend at the bottom left indicates '*Required Field'. At the bottom right, there are two buttons: 'Cancel' and 'Send'. The 'Send' button is highlighted with a red box and the number 7.

Vendor Self-Service Portal (PaymentWorks)

Step 8: Tracking Onboardings. 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.



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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

NOTE: The notification will not come from a Texas State University email account. If the vendor states they have not received the invitation, have them check their spam or junk mail.

Vendor Self-Service Portal (PaymentWorks)

Step 9: The initiator can view the progress for their sent invitations. This allows for follow up with the vendor to determine if they are having any issues accessing the system

Step 10: After a vendor account has been approved, the initiator can verify the assigned vendor number using the onboardings screen

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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

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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 style="width: 100%;"></div>

Vendor Self-Service Portal (PaymentWorks)

Question: Why can I not send an invite, it states that; “An invitation was previously sent to this email address” and I did not send one?

Answer: PaymentWorks does not allow multiple invitations to be sent to the same 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

Question: My payee did not receive the invite, what do I do?

Answer:

- Verify that the payee has checked their spam folder. The invitation email will come from PaymentWorks and not Texas State.
- Initiators have the ability to re-send an invitation

PaymentWorks Vendor Master Updates

Michael Giuffre, Tufts University Help Account Logout

Home Vendor Profiles Updates New Vendors Reimbursements

SHOW: Onboardings

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	

Invitation Details:

Initiator: Dick Doolin (tufts13@pwwexternal.com) Vendor Name: John Smith Contact E-mail: tufts15@pwwexternal.com Initiated: 12/07/2018 Email Sent: 12/07/2018

Personalized Message: Thank you for speaking with our chemistry class.

Custom Fields: Vendor Type : Honorarium

Cancel Reminders Resend Invitation

Vendor Self-Service Portal (PaymentWorks) - FAQ

Question: I entered the wrong email address, now what?

Answer:

- 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

ONBOARD START	UPDATED ▾	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
---------------	-----------	-------------	------------	----------------	-------------------------	------------

close ▾

Invitation Details:

Initiator: Dick Doolin (tufts13@pwexternal.com) Vendor Name: John Smith Contact E-mail: tufts15@pwexternal.com Initiated: 12/07/2018 Email Sent: 12/07/2018

Personalized Message: Thank you for speaking with

Custom Fields: Vendor Type : Honorarium

 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:
[Empty text area]

*Required Field

Vendor Self-Service Portal (PaymentWorks) - FAQ

Question: My payee has not completed the forms can I send them another invitation?.

Answer: 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

If you have further questions, contact the
Purchasing Office at (512) 245-2521
Or email vendorrequests@txstate.edu