Steps to follow before sending an Invitation

Initiator Role/Duplicated Registration

Part I. Check to see if the vendor is setup in PaymentWorks.

- 1. Log in to PaymentWorks at one of the link below:
 - 1) UH Main Campus: <u>https://paymentworks.com/login/saml/?idp=houstonmain</u>
 - 2) UH Victoria: <u>https://paymentworks.com/login/saml/?idp=houstonvictoria</u>
 - 3) UH Clear Lake: <u>https://paymentworks.com/login/saml/?idp=houstonclearlake</u>
 - 4) UH Downtown: <u>https://paymentworks.com/login/saml/?idp=houstondowntown</u>
- 2. Click "Vendor Master Updates"

Paym	entWorks graded our help system to better address user inquiries. Please explore our new knowledge base and	file all support requests here.	Initiator , University of Houston System (Test)			
	Setup and Manage Supplier Portal		Messaging			
	Vendor Master Updates		Payments			

3. Drop down and click "Setup and Manage Supplier Portal"

Paymen	tWorks		Vendor Master Updates	-	
# Home	New Vendors		Home		
We have upgraded	our help system to bette	er address user i	Account Management	e all suppo	
SHOW: Onboard	ings 🗸		Messaging		
		_	Vendor Master Updates	_	
		ONBOARE START	Setup and Manage Supplier Portal	ATION	

4. Click " Suppliers tab"

PaymentWor	ks Setup and	Setup and Manage Supplier Portal				
💣 Home 🔷 Administ	tration 🔒 Suppliers	Invoices				
We have upgraded our help system	to better address user inquiries. Plea	explore our new knowledge ba	se and file all support requests here.			
Welcome Page >	PaymentWorks auto sandbox.paymentw	ge omatically creates a Welcome Pr orks.com/universityofhouston/	age for your suppliers. You can direct them to go to this p			
	HC					

- 5. Enter "supplier Name" to search the vendor, and then you will see the Green Dot under the Connected Column as below.
 - For individual vendor: enter the Last name, First name
 - For business vendor: enter the partial short name

Supplier Name: Vendor Number:		Need h	elp 🕜							
Site Code:										
City:										
State:	State			~						
Zipcode:										
Country:										
Address Type:	Show All			~						
Contact Email:										
Connected:	Show All			~						
Clear										
Need help 🕢	SUPPLIER NAME +	VENDOR NUM	SITE	STREET	CITY	ST/ PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Supplier Name: bigtex										•
Vendor Number:										View Request
Site Code:										
Tax ID:										
City:										

Part II 3 Easy Steps to send an invitation

 Navigate www.uh.edu/finance – Departments - AP General – PaymentWorks – click your institution's link. Thenclick Vendor Master Updates (1), New Vendors (2), verify you are on Onboardings (3), and click Send Invitation (4).

		PaymentWor	ks	Vendo	or Master Updal	es 🔻	-		 Pam Muscarello, University of Houston System 	Help Account Logo m
		e ^o SHOW: Onboardings V	Profiles	✓ Updates	s O Nev	v Vendors	2			
PaymentWorks				ONBOARD START	UPDATED-	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
1991 C	1			10/26/2020	11/02/2020	KILL DOWN	Clicked	Email Validated	Submitted	
Setup and Manage Supplier Portal		Messaging	5			Call Colored	Clicked	Email Validated	Submitted	
vizio m Yufolan	1800 # 1210845		2	10/29/2020	11/0	Advant Donates Table	Clicked	Email Validated	Submitted	
Vendor Master Updates	Â	Payments	2	10/29/2020	11/02/2020	Lapitet-Arthuare, Inc.	Clicked	Email Validated	Submitted	
Unit III			-	10/29/2020	11/02/2020	na tartear t	Clicked	Email Validated	Submitted	
1	1		5	10/29/2020	11/02/2020	80000 Date:	Clicked	Email Validated	Submitted	
Invoice Lookup				10/20/2020	11/02/2020	Earlie Labor Ramos Pattoor	You will only any invitatio	y see the status of ns you have sent.	Submitted	
		ىر (inviacion)	=/	11/02/2020	11/02/2020	Eprillativess	Delivered	No Account	Not Started	
		Initiator:	/	10/26/2020	11/02/2020	instant	Clicked	Email Validated	Submitted	
		Clear Filters		10/27/2020	11/02/2020	tastnarenen marij, 1.10 marije	Clicked	Email Validated	Submitted	

2. **Invite** Complete the vendor invitation form and click send. Reason for inviting is not material—just select themost appropriate. The personalized message will be sent to the vendor as part of the invitation.

Company/Individual Name:*	<u> </u>
	Initiator Department.*
This field is required.	Initiator Phone Number:*
Contact E-Mail:*	
	Reason for inviting this supplier."
	- Choose One -
Verify Contact E-Mail:*	Personalized Message:
Description of Goods and Services."	
Description of Goods and Services.	

3. Monitor Monitor the progress on that page in PaymentWorks and watch for a vendor number when the process is complete. The timeline varies (most cases 1-2 weeks from vendor's application); some steps cannot berushed to allow us to verify that we can do business with the vendor based the documentation provided.

	-									
# Home	≜ ∨	endor Profiles	✓ Update:	s 🕕 Nev	w Vendors					
• SHOW: Onb	oardings •	~								
			ONBOARD START	UPDATED~	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE	•
Filter Results: Vendor Name:			10/27/2020	11/02/2020	Anna Salashiyara Martina A	Opened	No Account	Not Started		6
Vendor #:	(A		10/27/2020	11/02/2020	TRANSPORT	Clicked	Email Validated	Submitted		
Contact E-Mail			10/28/2020	11/02/2020	descenato; Complete	Clicked	Email Validated	In Progress		
Invitation Approval:		~	10/28/2020	11/02/2020	Lorder N. Decement	Opened	No Account	Not Started	-	
Invitation Delivered		~	10/21/2020	11/02/2020	colle de Autorn	Clicked	Email Validated	Complete		
Account Created: Registration		•) •)	10/27/2020	11/02/2020	AND A TRADE OF	Clicked	Email Validated	Complete Vendor #. 0000149158		
Source:		~	10/22/2020	11/02/2020	PROPERTY AND A DESCRIPTION OF THE PROPER	Clicked	Email Validated	Complete Vendor #: 0000147912	e	
Invitation Initiator	2		10/26/2020	11/02/2020	ion terment	Clicked	Email Validated	Complete Vendor #: 0000157008		
Clear Filters			10/29/2020	11/02/2020	A DECEMBER OF THE OWNER	Opened	No Account	Not Started	_	11
Ser	nd Invitation	n	10/28/2020	11/02/2020	STATISTICS.	Clicked	No Account	Not Started		

This is a quick version of the procedures. For more in-depth procedures or troubleshooting information, visit <u>https://uh.edu/office-of-finance/ap-general/</u> in the PaymentWorks section.