

# ***Important!***

***You must check-in to receive credit  
in your training history***

## ***Three ways for you to check-in:***

- *Click link in Chat Box provided by facilitator*
- *Use QR code (open camera on your smart phone)*
- *Open your browser and type in the web address below*



**<https://mytraining.utsa.edu/apps/checkin>**

***If you get an alert that you are not enrolled in the class, please let your facilitator know.***

***Enjoy your class!***

# PaymentWorks Vendor Onboarding Process

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AM0591

Disbursements & Travel Services (DTS)

*Summer 2022*

# Agenda

- Overview
- Roles and Responsibilities
- Initiator Role
- Navigate through PaymentWorks
- Search for Suppliers
- Invite a Supplier
- View Status of Onboarding Vendor Registration
- Tips & Tricks
- Online Help and Training Resources

# What is PaymentWorks?

- Platform to automate the collection of payee banking details, eliminating manual, paper-based processes
- Allows payers and payees to exchange verified identity elements in a networked environment, eliminates payment fraud and ensures compliance
- Includes a vendor onboarding registration process

# UT Shared Environment

UTShare campus cost-sharing with similar design and integration:

- UTSA
- UT Tyler
- UT System Administration
- UT Permian Basin
- UT El Paso
- UT Arlington
- UT Rio Grande Valley

# Benefits

- Automated process
  - ✓ Payee profile information updates is payee-driven; replaces the completion of SIFs (Supplier Information Form)
- E-Invitation
  - ✓ Departments send e-invitation to prospective vendor initiating the onboarding process
- Identity proofing
  - ✓ Verification of identity of the payee along with their banking information

# Benefits cont.

- Additional verifications
  - ✓ Compliance-related identity verification attributes, such as tax ID information, address, and monitoring of government sanction lists
- Viewable payment history
  - ✓ Once supplier user accounts are set-up, vendors can view the last two calendar years of payment information
- Applicable to domestic and foreign vendors
  - ✓ W9 and W8 BEN forms integrated

# Roles & Responsibilities

## **Initiator Role (departments):**

- Sends registration invitations to set up or update vendors using PaymentWorks
- Can access portal hyperlink in PeopleSoft within the **UTSA Business Solutions Center** tile

## **Supplier/Vendor Role (suppliers):**

- Completes registration process
- Maintains and updates supplier information
- Grants system access to other users within the organization
- Can access portal hyperlink from [DTS Supplier Setup Page](#)

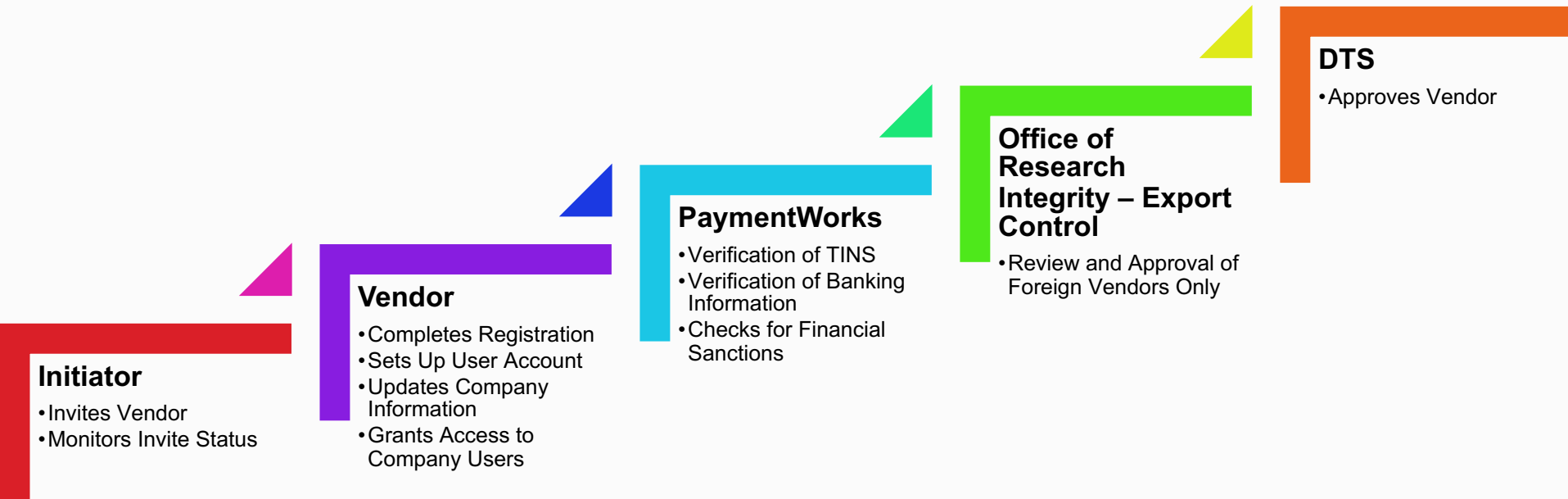


# Roles & Responsibilities cont.

- **PaymentWorks Role:**
  - Verification of TINs and banking information (contacts vendors)
  - Verification check of vendor financial sanctions
- **Office of Research Integrity - Export Control Role:**
  - Screening and approval of foreign vendors
- **Back Office Role (DTS):**
  - Approver of supplier registrations

*Note:* Vendors are approved within 24-72 hours; however, possible delays are contingent on expediency with which vendors complete registration and/or clearance of financial sanctions.

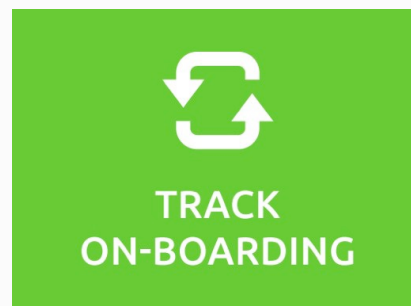
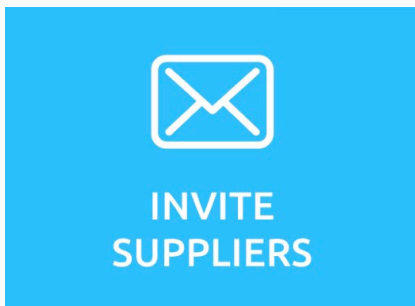
# Vendor Onboarding Process



# Initiator Role

PeopleSoft users will have access to **PaymentWorks**.  
Once users log in, the role defaults to the Initiator Role.

## Initiator Responsibilities



A valid vendor email address is required

# How to Navigate to PaymentWorks

## Initiator Role Navigation:

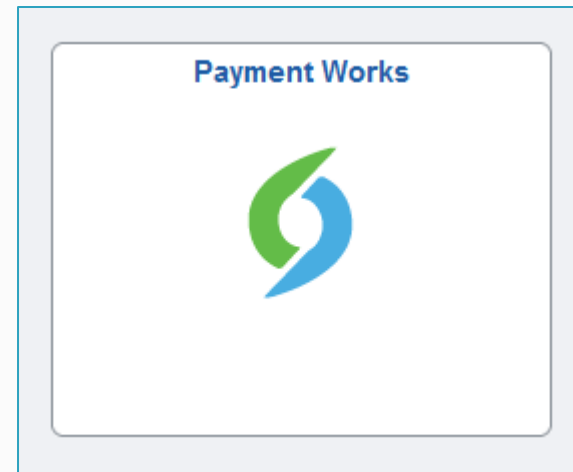
- Log in to UTShare/PeopleSoft and click on UTSA Business Solutions Center tile



# How to Navigate to PaymentWorks cont.

Click on the PaymentWorks tile

- You may be prompted to use your SSO (Single Sign-On) to log in
- Once logged in, you can:
  - Search
  - Send invite to onboard vendor

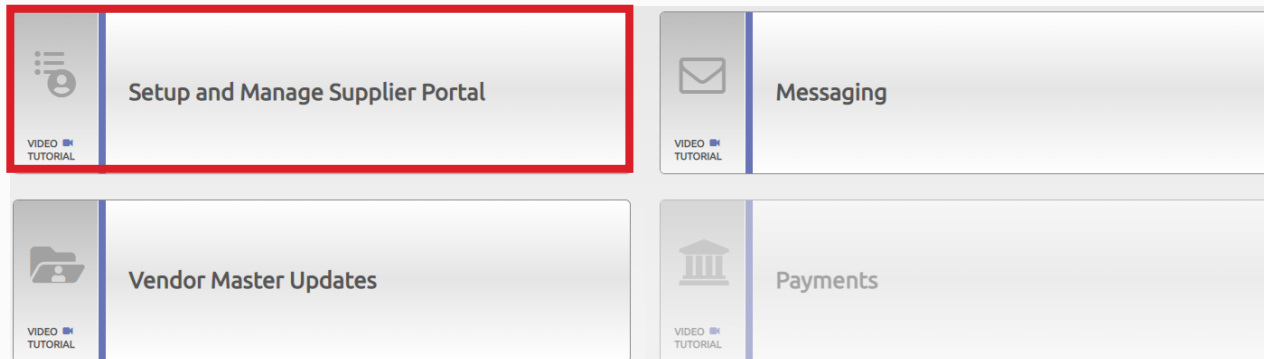




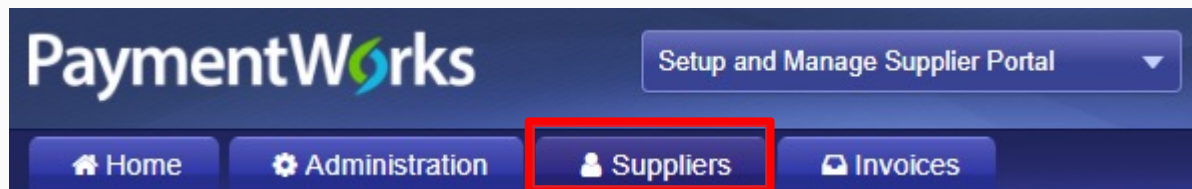
# How to Search for Suppliers

# Search for Suppliers Option 1

Once logged in to PaymentWorks, click on **Setup and Manage Supplier Portal** to send e-invitation to vendor.



Click on **Suppliers** tab.





# Search for Suppliers

## Option 1 cont.

The Supplier list is displayed.

<span>Home</span> <span>Administration</span> <span><b>Suppliers</b></span> <span>Invoices</span>										
Need help ?										
<input type="text"/> Supplier Name:										
<input type="text"/> Vendor Number:										
<input type="text"/> Site Code:										
<input type="text"/> City:										
<input type="text"/> State: <span>State</span>										
<input type="text"/> Zipcode:										
<input type="text"/> Country:										
<input type="text"/> Address Type: <span>Show All</span>										
<input type="text"/> Contact Email:										
<input type="text"/> Connected: <span>Show All</span>										
<input type="button" value="Clear"/>										
SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECT	
Alex David Jerez-Roman	0000103465	001 1	812 S. New Street	Champaign	IL	61820	US	alex.d.jerez@gmail.com		
1010 Collins LLC	0000052607	001 1	1010 N Collins St	Arlington	TX	76011-6134	US	mgurule@brubeckinc.com		
1099, Tax	0000104679	ONL-PW-1 2	516 Bluebird Dr	Powell	OH	43065	US	utapw2020+tax1099@gmail.com	<input checked="" type="checkbox"/>	
1105 MEDIA INC	0000046984	SHARED 1	9121 OAKDALE AVE STE 101	CHATSWORTH	CA	913116526	US			
1105 MEDIA INC	0000046984	SHARED 2	9201 OAKDALE AVE STE 101	CHATSWORTH	CA	913116546	US			
1105 MEDIA INC	0000046984	SHARED 3	PO BOX 15846	NORTH HOLLYWOOD	CA	916155846	US			
1105 MEDIA INC	0000046984	SHARED 4	PO BOX 894085	LOS ANGELES	CA	901894085	US			
1105 MEDIA INC	0000046984	SHARED 5	1201 MONSTER RD SW STE 250	RENTON	WA	980572996	US			
1105 MEDIA INC	0000046984	SHARED 6	1227 UNIVERSITY OF OREGON	EUGENE	OR	974031205	US			

*Note:* A vendor can be **approved** but not **connected**. **Connected** means the vendors in PaymentWorks have successfully interfaced into PeopleSoft and Rowdy Exchange.

# Search for Suppliers Option 1 cont.

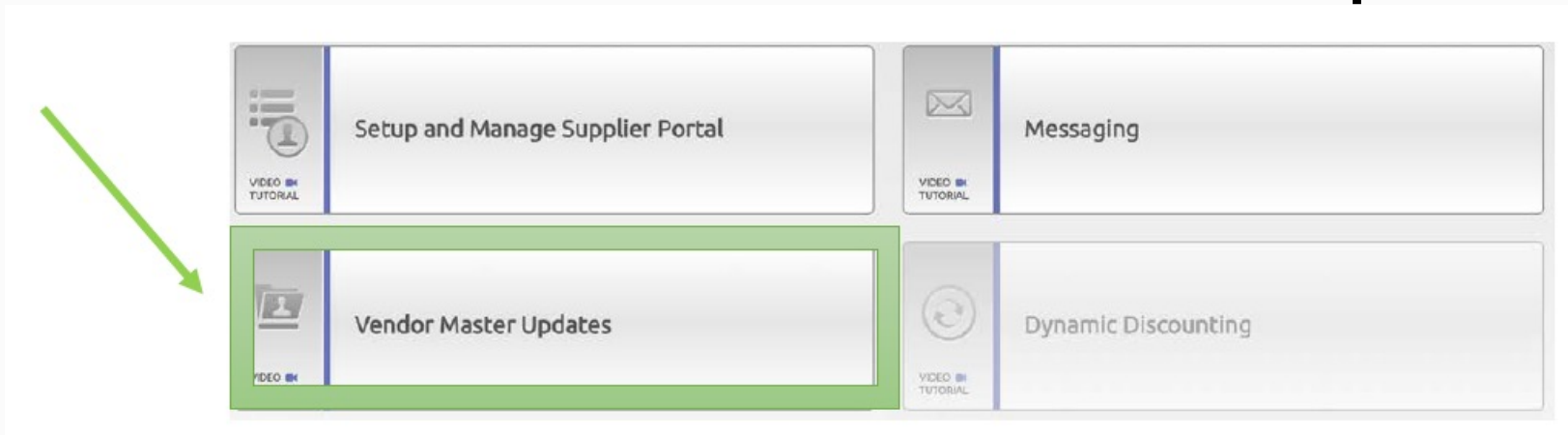
To display **Connected** Suppliers ONLY, click on the **Connected** search field and select option **Connected Only**. Verify supplier address to ensure correct vendor is used.

The screenshot shows the 'Suppliers' search interface. The 'Suppliers' tab is selected. On the left, there are search filters for Supplier Name, Vendor Number, Site Code, City, State, Zipcode, Country, Address Type, and Contact Email. A 'Connected' dropdown menu is set to 'Connected Only'. Below the filters is a 'Clear' button. The main area displays a table of suppliers with the following columns: SUPPLIER NAME, VENDOR NUM, SITE CODE, STREET, CITY, ST/PRV, ZIP CODE, COUNTRY, CONTACT EMAIL, and CONNECTED. The 'CONNECTED' column contains green dots for each supplier listed.

SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Boogie Wood Band	0000104753	ONL-PW-1 3					US		●
Boss, Own	0000104744	ONL-PW-1 2	456 18th St	Butner	NC	27509	US	utapw2020+sole@gmail.com	●
Connect Existing	0000104737	ONL-PW-1 2	Alan 2613 My Street1	Irving	TX	76014	US	UTSPW2020+SOLEEINSSN@gmail.com	●
Connect existing FOLLETT	0000002117	SHARED 18	4901 E UNIVERSITY BLVD	ODESSA	TX	79762	US		●
Corolla Inc	0000104754	ONL-PW-1 2	1234 W 30th St	1234 W 30th St	CO	81650	US	utapw2020+corolla@gmail.com	●
Corolla Inc	0000104733	ONL-PW-1 2	1234 W 30th St	Rifle	CO	81650	US	utapw2020+corolla@gmail.com	●
Dallas Wings	0000100573	001 3	10001 Main Stree2	Irving	TX	75033	US	UTSPW2020+SOLEEINSSN@gmail.com	●
Existing, 1099 Jim	0000015029	SHARED 2	5474 Ridgeway Dr	Watauga	TX	76137-2694	US		●

# Search for Suppliers Option 2

Go back to **Home** and click on **Vendor Master Updates**



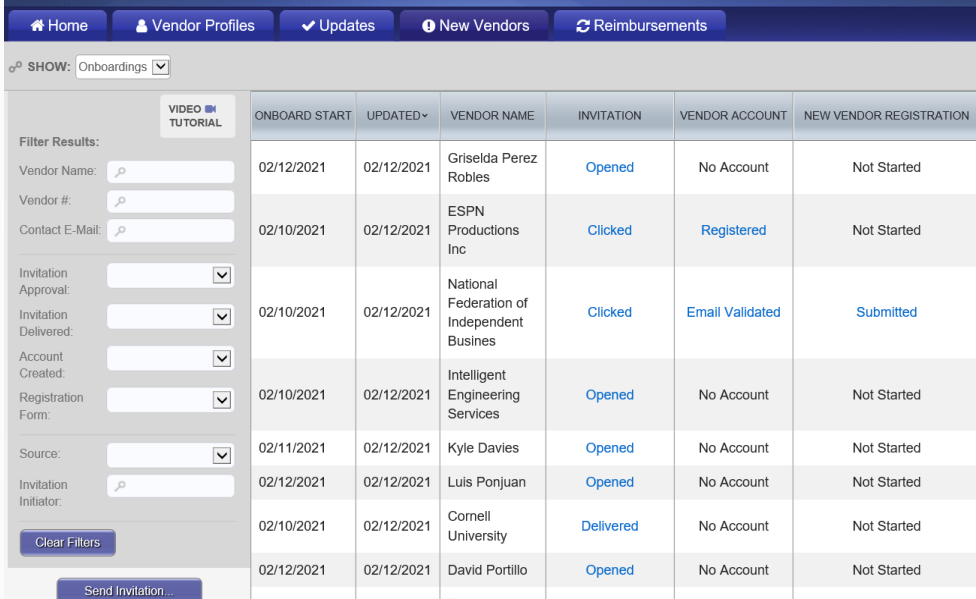
Click on **New Vendors** tab



# Search for Suppliers Option 2 cont.

The new supplier list is displayed

- Scroll through the supplier list



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION
02/12/2021	02/12/2021	Griselda Perez Robles	Opened	No Account	Not Started
02/10/2021	02/12/2021	ESPN Productions Inc	Clicked	Registered	Not Started
02/10/2021	02/12/2021	National Federation of Independent Busines	Clicked	Email Validated	Submitted
02/10/2021	02/12/2021	Intelligent Engineering Services	Opened	No Account	Not Started
02/11/2021	02/12/2021	Kyle Davies	Opened	No Account	Not Started
02/12/2021	02/12/2021	Luis Ponjuan	Opened	No Account	Not Started
02/10/2021	02/12/2021	Cornell University	Delivered	No Account	Not Started
02/12/2021	02/12/2021	David Portillo	Opened	No Account	Not Started

**TIP!**

\*The supplier registration invitation has been sent by the department. Observe the different statuses of an invite.

# Search for Suppliers

## Option 2 cont.

The general supplier invitation is displayed.

**Important:** Verify email address before selecting supplier.

The screenshot displays a web interface for managing suppliers. At the top, there is a navigation bar with tabs for Home, Vendor Profiles, Updates, New Vendors, and Reimbursements. Below the navigation bar, a 'SHOW:' dropdown menu is set to 'Onboardings'. A 'VIDEO TUTORIAL' button is visible. The main content area is divided into a left sidebar with filter results and a main table area.

**Filter Results:**

- Vendor Name:
- Vendor #:
- Contact E-Mail:
- Invitation Approval:
- Invitation Delivered:
- Account Created:
- Registration Form:
- Source:
- Invitation Initiator:

**Table Headers:** ONBOARD START, UPDATED, VENDOR NAME, INVITATION, VENDOR ACCOUNT

**Invitation Details:**

Initiator: Kelly Wiley-Rock (kelly.rock@utsa.edu)      Vendor Name: Griselda Perez Robles

**Custom Fields:**

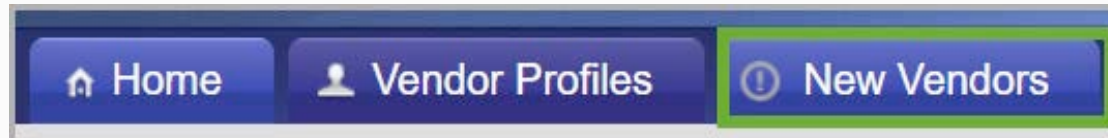
- Reason for Inviting this Supplier : Product and Service
- Initiator Phone Number : 210-458-4375
- Initiator Department : Diana Lomas / COLFA
- Description of Goods and Services : All applicable goods and services

**Approval History:**

Feb 12, 2021 11:21 AM: Approved by Kelly Wiley-Rock <kelly.rock@utsa.edu> (Vendor Approver)  
Message: None

# Search for Suppliers Not Listed

If a supplier name is not found using Option 1 or Option 2, click on the **New Vendors** tab.



# Search for Suppliers Not Listed cont.

In the **Filter Results** screen, search by **Vendor Name, Vendor ID** or **Contact E-mail**.

If the supplier is found:

- The supplier has been invited and is in some stage of the registration process; however, still **not connected and not available for use**

If the supplier is not found:

- Then a PaymentWorks invite should be initiated

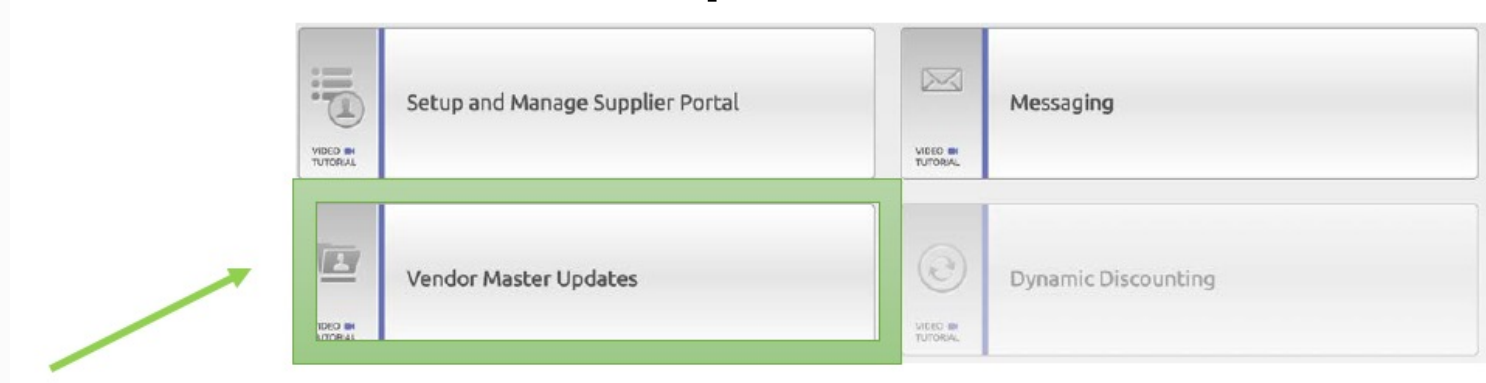
The screenshot shows a web interface for 'Vendor Profiles'. At the top, there are navigation buttons for 'Home' and 'Vendor Profiles'. Below that is a 'SHOW:' dropdown menu set to 'Onboardings'. A 'VIDEO' icon is visible. The main section is titled 'Filter Results:' and contains three search input fields: 'Vendor Name:', 'Vendor #:', and 'Contact E-Mail:'. Below these are several filter dropdown menus: 'Invitation Approval:', 'Invitation Delivered:', 'Account Created:', 'Registration Form:', 'Source:', and 'Invitation Initiator:'. At the bottom of the filter section is a 'Clear Filters' button. Below the filter section is a 'Send Invitation...' button.

# How to Invite a Supplier

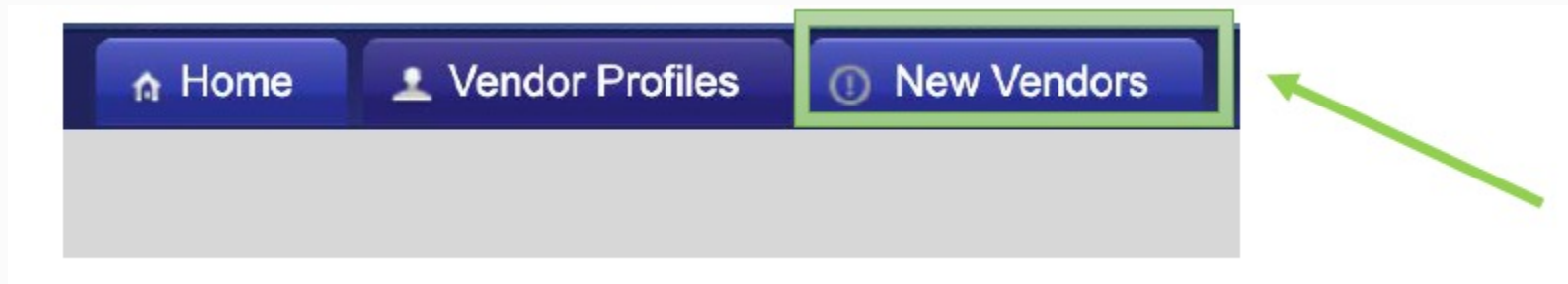


# How to Invite a Supplier

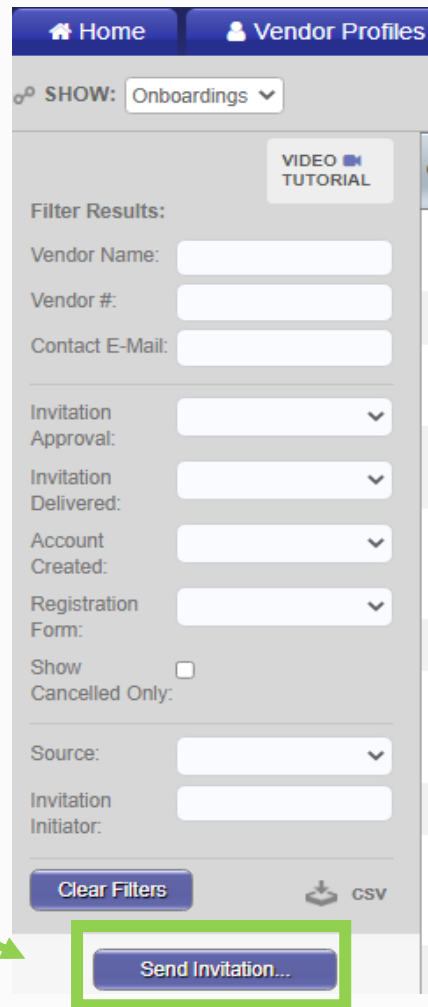
Click on **Vendor Master Updates**



Click on the **New Vendors** tab



# How to Invite a Supplier cont.



The screenshot shows the 'Vendor Profiles' page with a 'SHOW: Onboardings' dropdown. A 'VIDEO TUTORIAL' button is visible. The 'Filter Results' section includes input fields for 'Vendor Name', 'Vendor #', and 'Contact E-Mail'. Below these are dropdown menus for 'Invitation Approval', 'Invitation Delivered', 'Account Created', and 'Registration Form'. There is also a 'Show Cancelled Only' checkbox. At the bottom, there are 'Clear Filters' and 'CSV' buttons, and a 'Send Invitation...' button which is highlighted with a green box and pointed to by a green arrow.



A **Video Tutorial** is available to help you navigate screens.

Click on the **Send Invitation** button

# How to Invite a Supplier cont.

The **Invite New Vendor** screen will appear. Complete the fields and click the **Send** button

The image displays two screenshots of the 'Invite New Vendor' web form. The left screenshot shows the 'Company/Individual Name' field with a red error message 'This field is required.' The right screenshot shows the 'Initiator Department' field with a red error message '\*Required Field' and a disabled 'Personalized Message' text area. Both screenshots include 'Cancel' and 'Send' buttons at the bottom right.

**Invite New Vendor**

Company/Individual Name:\*  
This field is required.

Contact E-Mail:\*

Verify Contact E-Mail:\*

Description of Goods and Services:\*

\*Required Field

**Invite New Vendor**

Initiator Department:\*

Initiator Phone Number:

Reason for Inviting this Supplier:\*

- Choose One -

Personalized Message:

\*Required Field

Cancel Send

Note: The **personalized message** box has been disabled.

# Naming Standards

The following are best-practice naming standards for creating suppliers in vendor files. These standards will provide consistency and accuracy when loading and maintaining suppliers in the vendor files.

# Naming Standards

- Improper or lax standards can cause significant degradation of the accuracy of information generated from the system, fines and improper tax reporting, and loss of control
- The naming conventions make it easier for development and maintenance teams to carry out their work
- The **Company/Individual Name** is the vendor's full name. This may or may not be the legal name shown on the vendor's W-9

# Naming Standards cont.

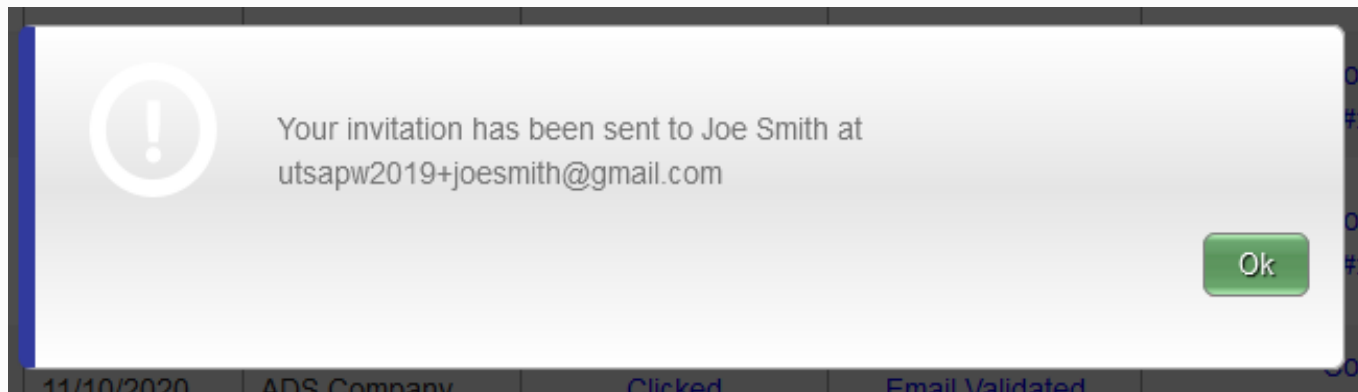
- All names should be in upper case (SMITH, JOHN)
- Enter last, first name (SMITH, JOAN)
- Do not use punctuation, such as periods or commas, in business names
- Do not use abbreviations except when the last word in the company is CO, CORP, INC, LP or LLC
- Do not use the word “**THE**” in front of the name of an organization: for example, ~~THE~~ UNIVERSITY OF TEXAS

# Naming Standards cont.

- Do not use abbreviations for vendors where it may cause confusion, such as:
  - APA (American Payroll Association or American Psychology Association) or AARP (American Association of Retired Persons or American Association of Research Pathologists)
- For vendors commonly known by their initials or an acronym, the initials or acronyms may be used rather than the full name
  - No spaces or acronym may be used rather than the full name. No spaces or periods are entered between the initials of a vendor

# How to Invite a Supplier cont.

Initiator receives a confirmation once the invitation is sent.





# Sample of Supplier Invitation

Initiator's name self-populates



Link to UTSA's **Vendor Portal** included



Initiator's email address self-populates



For help, supplier must contact PaymentWorks



**UTSA**

The University of Texas at San Antonio™

**PaymentWorks**

Dear <SUPPLIER NAME>:

**FirstName LastName** invites you to register as a new vendor for The University of Texas at San Antonio (UTSA). Before you begin the registration process, be sure to have the following information available:

1. A valid tax ID (EIN or SSN)
  - If you are a foreign vendor and are not set up with an ITIN, contact [Disbursements and Travel Services](#) to request a temporary ITIN.
2. ACH (direct deposit) information
  - To expedite payments, direct deposit is recommended; otherwise, paper checks will be mailed and may take up to a week longer to produce.

To establish you or your company as a UTSA payee or vendor, you must register in PaymentWorks, UTSA's supplier portal. After completing your registration, you will receive an email asking you to verify registration information to activate your account. UTSA will process your account for approval.

UTSA will notify you in a second email once your registration is approved. Upon approval, you can log in to PaymentWorks to view payment status information and access "Help: Take a Quick Tour" to assist you with navigating your vendor account. [Job aids are also available](#) to assist you.

#### Submitting Your Invoices

Submit your **PO-related** invoices to [Disbursements and Travel Services](#) for payment processing. Please include the relevant PO number on the invoice. If your payment is not processed within 30 days, please email Disbursements and Travel Services.

Submit your **non PO-related** invoices to: [\[Initiator's email address\]](#) for payment processing. If your payment is not processed within 30 days, please email [\[link to same email\]](#).

If you have questions regarding PaymentWorks or the registration process, please refer to the knowledge base [PaymentWorks site available for vendors](#).

The University of Texas at San Antonio

# Supplier Registration Process

- Suppliers are prompted to join and set up a user account in PaymentWorks
- After user account is set up, suppliers are asked to confirm an email address before completing the next step of the registration process (e.g., vendor name, address, SS# or TINS#, banking information, etc.)
- Once the registration process has been successfully completed and registration form submitted, suppliers will receive an e-confirmation

# Existing Vendors

Existing suppliers must receive an invite from UTSA to:

- **Set up** a new user account in PaymentWorks
- **Update** current vendor information in PeopleSoft

Once user account is established, vendors must then login to their user account to:

- **Update** current vendor information in PeopleSoft

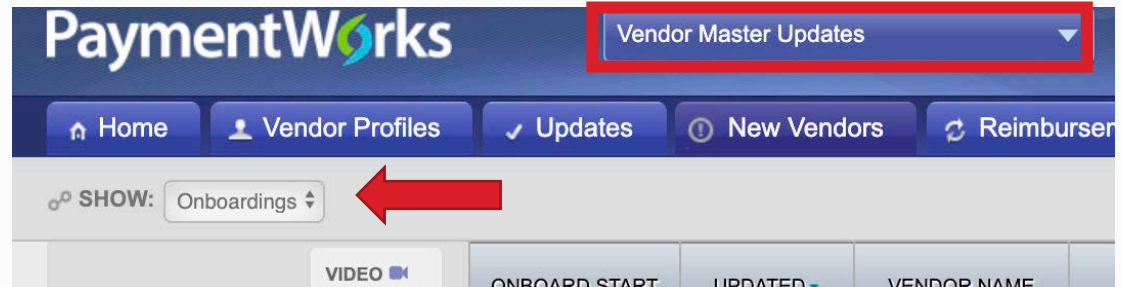
Once an invitation has been sent by a user, PaymentWorks does not allow other users to send additional invitations using the same email address. An alternate supplier email address is required to send new invites.



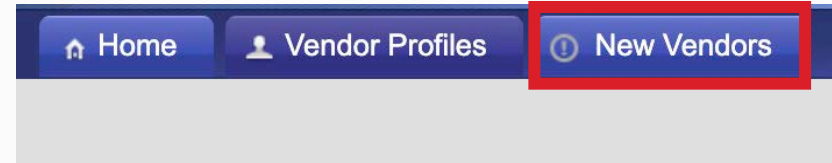
# **How to View Status of an Onboarding Vendor Registration**

# View Invite Status

Navigate to the **Vendor Master Updates** page



Click on the **New Vendors** tab



The supplier's record indicates the status of the registration:  
**Delivered**

Home Vendor Profiles Updates New Vendors Reimbursements

SHOW: Onboardings

VIDEO TUTORIAL

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
12/05/2019	12/30/2019	TOYOTA	Delivered	No Account	Not Started	<div style="width: 50%;"></div>

Filter Results: Vendor Name:

# View Vendor Onboarding Status

On the **New Vendors** tab, you can track the status of the supplier's registration invitation, vendor account and new vendor registration status.

**TIP!**

A **Video Tutorial** is available to help you navigate screens.

Home Vendor Profiles Updates New Vendors Reimbursements

SHOW: Onboardings

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
08/13/2021	08/30/2021	SANCHEZ ALVARADO, ALDAIR	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>

**Invitation Statuses**

- Sent
- Delivered
- Undeliverable
- Opened
- Clicked
- Cancelled

**Vendor Account Statuses**

- No Account
- Registered
- Email Validated

**New Vendor Registration Statuses**

- Not Started
- In Progress
- Submitted – Pending PaymentWorks Review
- Submitted - PaymentWorks Waiting for Vendor Response
- Submitted – Pending Internal Review
- Returned
- Approved
- Complete
- Rejected

# How to View General Information of Onboarding Vendor Status

Click on the hyperlink in the **Invitation** column to view general status information of onboarding vendor. You can disable reminders or resend invitation from this screen.

04/20/2020	05/01/2020	Invitation template test3	<a href="#">Opened</a>	No Account	Not Started	<input type="checkbox"/>
------------	------------	---------------------------	------------------------	------------	-------------	--------------------------

**Invitation Details:** close

<b>Initiator:</b> Ana Mendoza (ana.anaya@utsa.edu)	<b>Vendor Name:</b> Fidelity Investments Charitable Gift Fund	<b>Contact E-mail:</b> fcadvisorservices@fmr.com	<b>Initiated:</b> 03/17/2021	<b>Email Sent:</b> 03/17/2021
---	--	---	---------------------------------	----------------------------------

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**Custom Fields:**

Reason for Inviting this Supplier : Product and Service

Initiator Phone Number : 2104586886

Initiator Department : Mardia.McCarthy@utsa.edu

Description of Goods and Services : All applicable goods and services

[Disable Reminders](#) [Resend Invitation](#)



# Invitation Status

Status	Explanation
Sent	Your invitation to the vendor to register on PaymentWorks has been sent.
Delivered	The vendor has received the invitation at the provided email address.
Undeliverable	The vendor could not receive the invitation at the provided email address.
Opened	The vendor opened the email containing the invitation.
Clicked	The vendor clicked on the embedded link to create a PaymentWorks account.
Cancelled	You have cancelled the invitation reminders from being sent to the vendor.

# Vendor Account Status

Status	Explanation
No Account	The vendor has not yet created an account on PaymentWorks.
Registered	The vendor has created an account on PaymentWorks.
Email Validated	The vendor has verified their email address.

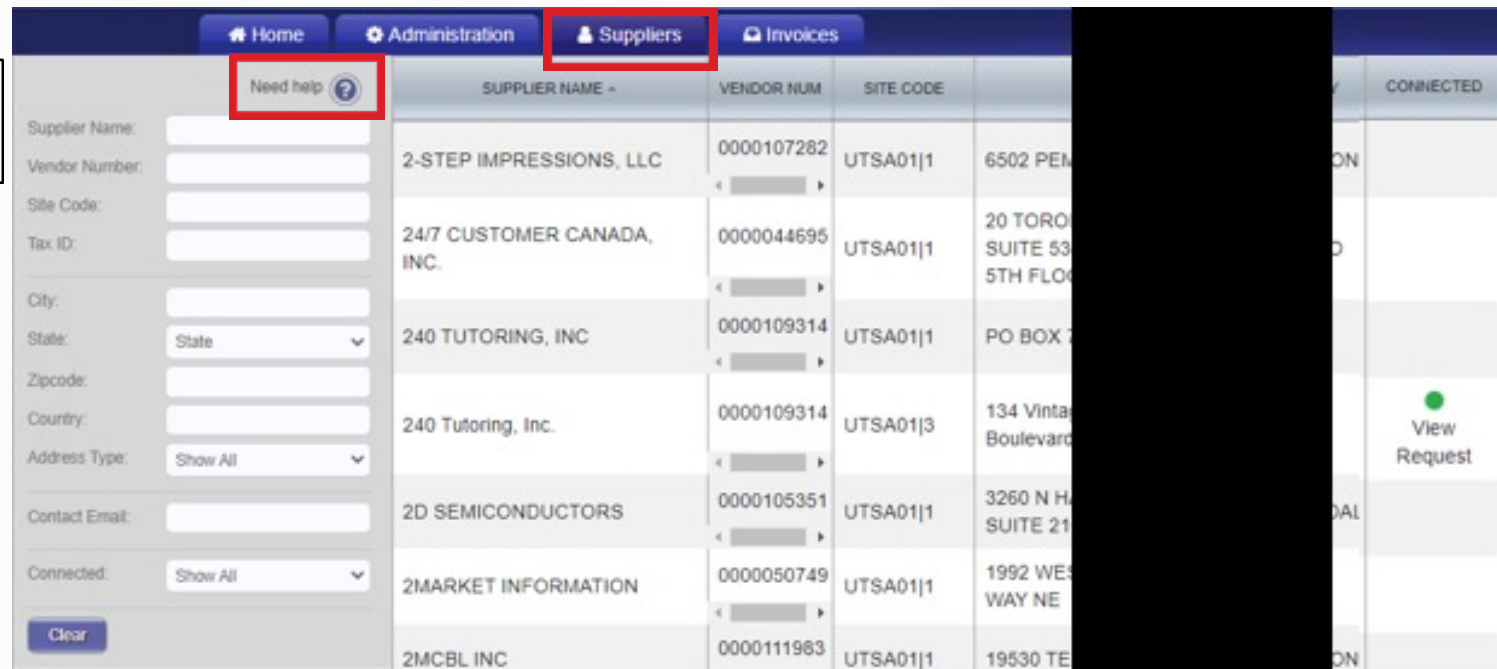
# Vendor Onboarding Registration Status

Status	Explanation
Not Started	The vendor has not started filling in the registration form.
In Progress	The vendor has started filling in the registration form, but has not completed it.
Submitted - Pending PaymentWorks Review	The vendor has completed and submitted the registration form. PaymentWorks is now in the process of reviewing the vendor's banking information.
Submitted - PaymentWorks Waiting for Vendor Response	The vendor has completed and submitted the registration form. PaymentWorks has called the vendor and left a message, and the vendor needs to return the phone call.
Submitted - Pending Internal Review	The vendor has completed and submitted the registration form. PaymentWorks has reviewed the bank account, and the registration is now waiting for internal review from the initiator's organization.
Returned	The registration form was returned to the vendor to be corrected and resubmitted.
Approved	The vendor registration form has been approved.
Complete	The vendor registration process is complete and a vendor number has been generated to allow your organization to issue payments to the vendor.
Rejected	The registration form for this vendor has been rejected by your organization.

# Suppliers with Connected Status

Suppliers with a **connected** status have successfully interfaced with PeopleSoft and Rowdy Exchange. **Connected** vendors will display a **green** dot in the **connected** column.

Click on **Need Help** to assist with navigating screens.



	SUPPLIER NAME	VENDOR NUM	SITE CODE	CONNECTED
Supplier Name:	2-STEP IMPRESSIONS, LLC	0000107282	UTSA01 1	
Vendor Number:	24/7 CUSTOMER CANADA, INC.	0000044695	UTSA01 1	
Site Code:	240 TUTORING, INC	0000109314	UTSA01 1	
Tax ID:	240 Tutoring, Inc.	0000109314	UTSA01 3	● View Request
City:	2D SEMICONDUCTORS	0000105351	UTSA01 1	
State:	2MARKET INFORMATION	0000050749	UTSA01 1	
Zipcode:	2MCBL INC	0000111983	UTSA01 1	

# Viewing of Invoices

Initiators and vendors have access to view vendor payments (invoices) for the last two calendar years (2019 and 2020) with a UTSA01 location.

- Additional **detail** payment information for all vendor locations remains housed in PeopleSoft

Select the **Invoices** tab to view invoice payments.

The screenshot shows the 'Invoices' tab selected in the navigation menu. On the left, there is a search filter panel with fields for Supplier Name, Vendor Number, Site Code, Tax ID, City, State, Zipcode, Country, Address Type, Contact Email, and Connected. The main table displays the following data:

SUPPLIER NAME ^	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTE
"ARTISTICALLY YOURS" BY KIM HEBERT	0000103184	UTSA01 1	13580 LANDOVER DRIVE	DENHAM SPRINGS	LA	70726	US	ARTYOURSKIM@COX.NET	
1 PRIORITY BIOCIDAL, LLC	0000102487	UTSA01 1	2410 GRAVEL DRIVE	FORTH WORTH	TX	76118	US	KGALLOWAY@GOLBIO.COM	
1-MTZ CONSTRUCTION	0000105056	UTSA01 1	1545 W MULBERRY AVE	SAN ANTONIO	TX	78201	US	MONICA-L.SANCHEZ@NIS D.NET	
1-MTZ CONSTRUCTION	0000105056	UTSA01 2	PO BOX 791203	SAN ANTONIO	TX	78279-1203	US	1MTZCONSTRUCTIONTX@GMAIL.COM	
1-MTZ CONSTRUCTION	0000105056	UTSA01 3	305 E RAMSEY RD	SAN ANTONIO	TX	78216	US		
1000 WORDS PRODUCTIONS	0000100582	UTSA01 1	1351 HIGHLAND	SAN ANTONIO	TX	78210	US	ONETHOUSANDWORDSPRODUCTIONS@YAHOO.COM	
10X GENOMICS, INC	0000102989	UTSA01 1	7068 KOLL CENTER PKWY, SUITE 401	PLEASANTON	CA	94566	US	CUSTOMERSERVICE@10XGENOMICS.COM	
10X GENOMICS, INC	0000102989	UTSA01 2	DEPT CH 10944	PALATINE	IL	60055-0944	US	ACCOUNTING@10XGENOMICS.COM	
12TH MAN FOUNDATION	0000104943	UTSA01 1	PO BOX 2800	COLLEGE STATION	TX	77841	US		

# Viewing of Invoices

Window will expand when clicking on the invoice line

Jul [REDACTED] (Vendor Number: 000010 [REDACTED]; Site Code: <b>UTSA01 1</b> ) <span style="float: right;">close</span>									
Invoice #	February 2020 Stipend - State	Date	04/22/2020	Invoice Amount	USD \$20.00	Actual Paid Amount	USD \$20.00	Purchase Order	Ref Key
STATUS	PAID	Scheduled Pay Date	04/23/2020	Actual Pay Date	04/23/2020	Pay Document #	1000208036	Status Code	paid

**Site Code:** UTSA01|1 (Mapped to location and sequence address in PeopleSoft)

*Note:* Payment updates are immediate but may encounter a small delay due to server data exchange. Vouchers created **before** a vendor update, will retain old information. Vouchers created **after** a vendor update, will reflect vendor update.

# Supplier Reminders

- Onboarding vendors receive emails until the registration is complete or reminders are cancelled
- From the date the invite is submitted, reminder email notifications automatically generate as follows:
  - ✓ 1<sup>st</sup> Reminder – 3 days
  - ✓ 2<sup>nd</sup> Reminder – 7 days
  - ✓ 3<sup>rd</sup> Reminder – 14 days
  - ✓ 4<sup>th</sup> Reminder – 21 days
  - ✓ 5<sup>th</sup> Reminder – 28 days



# Setting up UTSA as a Vendor



- Contact DTS to setup UTSA as a vendor on other similar automated platforms.
- DTS will establish user accounts on behalf of UTSA.







## Tips & Tricks



Do not re-send an invitation unless the supplier notifies you that the initial email was not received.

- Remember to check the vendor onboarding status before resending an invite



You can resend an invite only if the **Invitation** column status is on **Sent, Delivered, Opened or Clicked** and if the **Vendor Account** column states **No Account**.



You can correct an email address on an invite by clicking on the **Resend Invite** button and entering the correct email address.



## Tips & Tricks cont.



Cancel/Disable reminders for the first invite when correcting a supplier email address; otherwise you will continue to generate reminders.



You cannot delete an invite, but you can disable it.



If a supplier will no longer be used, you can cancel/disable the invite by disabling the reminders.



## Tips & Tricks cont.



Suppliers in an **approved** status and properly interfacing with PeopleSoft and Rowdy Exchange will display a **connected** status with a vendor number.

- Suppliers in **connected** status have setup user accounts

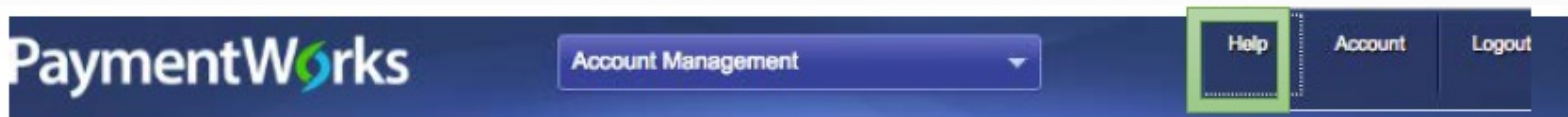


Foreign vendors without a TIN must first contact [DTS](#) to request a temporary TIN.

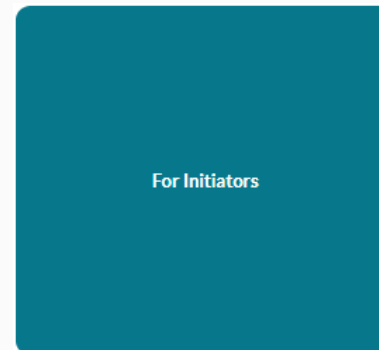
- TINs are required for account set-up

# Online Help

Located at the top right corner, **Help** is available to assist you with navigating and moving between screens

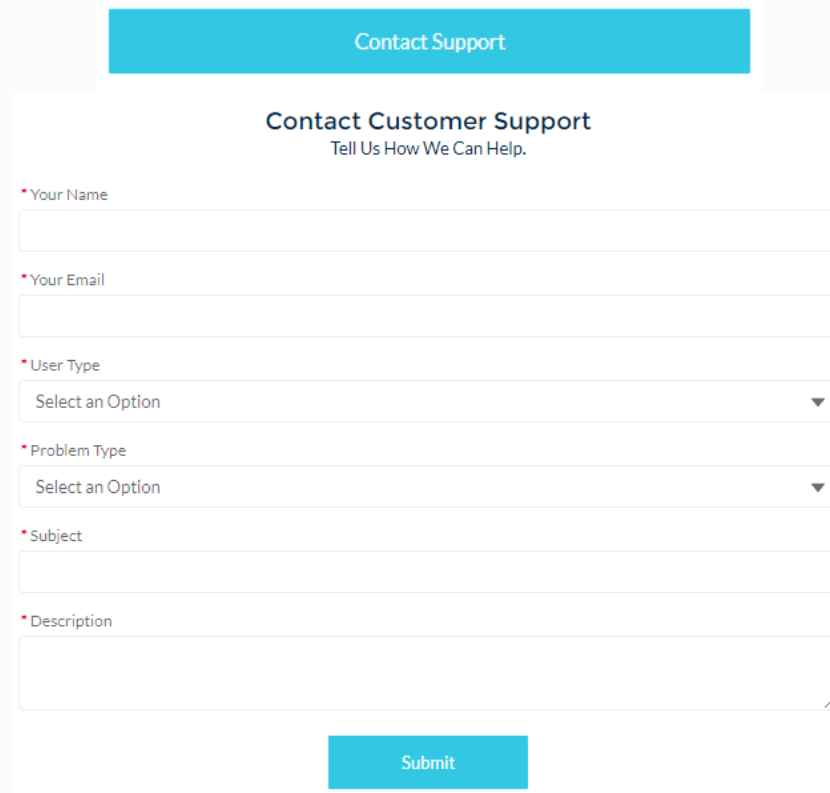


A tile **For Initiators** within the **Help** feature also displays on the page.



# Online Help cont.

For questions regarding the PaymentWorks platform, please use the **Help** feature and then click on the **Contact Support** button.



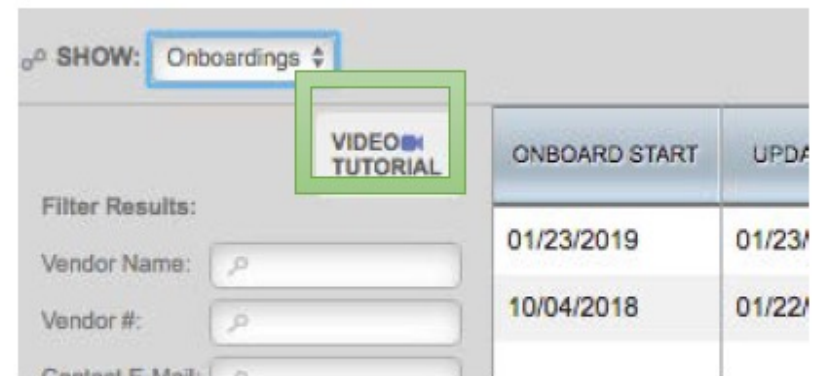
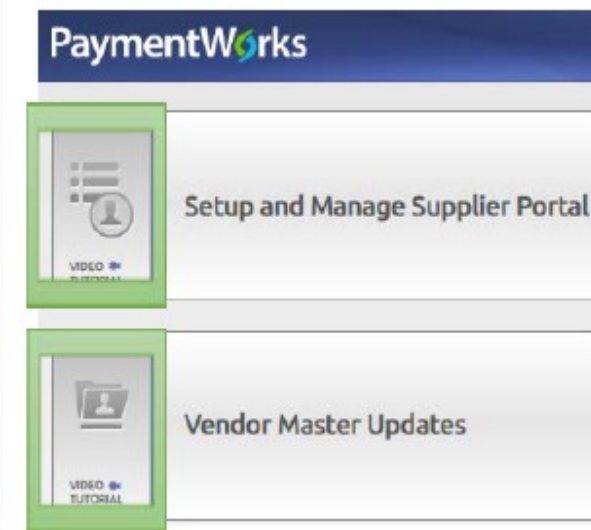
The screenshot shows a web form titled "Contact Customer Support" with the subtitle "Tell Us How We Can Help." The form is contained within a light gray box. At the top of the box is a blue button labeled "Contact Support". Below the title, there are six input fields, each with a red asterisk indicating a required field:

- Your Name:** A text input field.
- Your Email:** A text input field.
- User Type:** A dropdown menu with "Select an Option" and a downward arrow.
- Problem Type:** A dropdown menu with "Select an Option" and a downward arrow.
- Subject:** A text input field.
- Description:** A larger text area for detailed input.

At the bottom of the form is a blue button labeled "Submit".

# Online Help cont.

PaymentWorks homepage and onboarding pages contain video tutorials to assist with navigating through the online platform. Click each button to view them.







# Contact Information

## For supplier questions:

- PaymentWorks:
  - ✓ [Vendors knowledge base support website](#)
  - ✓ Click on **Contact Support** button
- Disbursements & Travel Services
  - ✓ Email: [disbursements.travel@utsa.edu](mailto:disbursements.travel@utsa.edu)



Contact Support

## For security role access:

- UTS
  - ✓ Email: [techcafe@utsa.edu](mailto:techcafe@utsa.edu)

# Training Resources

- [Initiator Role Job Aid](#)
- [Vendor Role Job Aid](#)



*Thank you for attending class*

**Please complete the electronic evaluation form**

**Go to: <https://mytraining.utsa.edu/apps/evaluations>**

- Click 'Load classes' (orange tab)
- Click the name of the class you took today
- Click 'Start Evaluation'
- Click 'Give Feedback'
- IMPORTANT '1' is LOW and '7' is HIGH



**Please add your comments in the open comment box at the end.**

Thank you!

The University of Texas at San Antonio

**UTSA** Financial Affairs

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