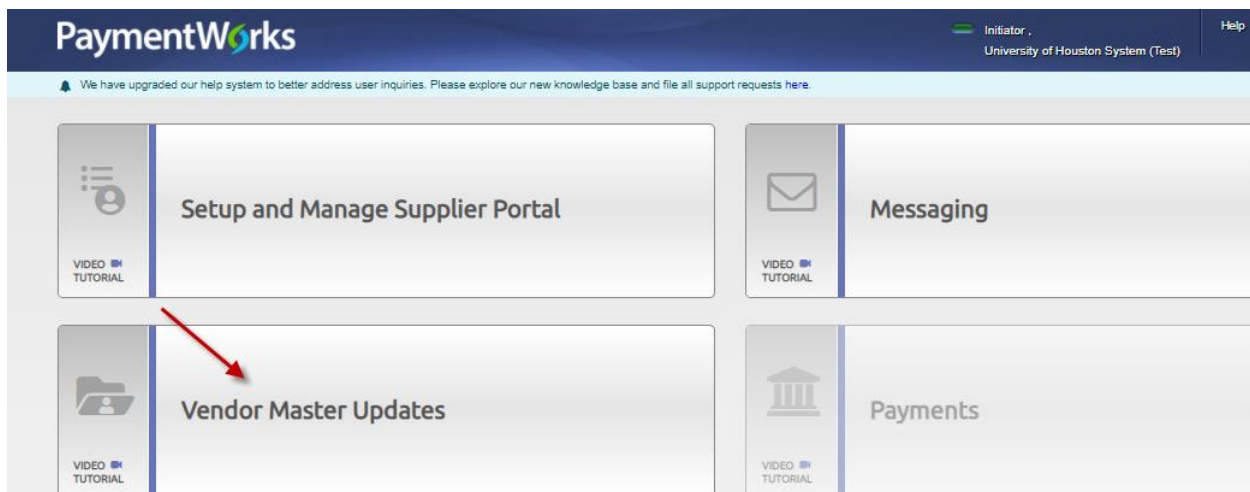


# Steps to follow before sending an Invitation

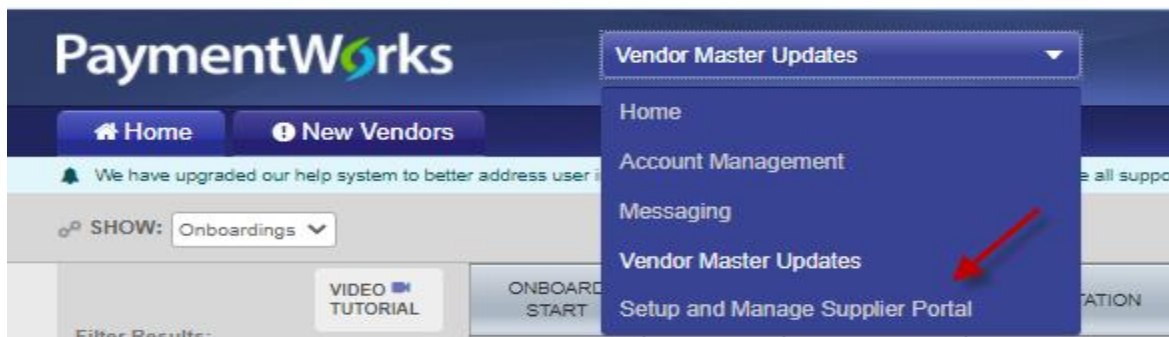
## Initiator Role/Duplicated Registration

### 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: <https://paymentworks.com/login/saml/?idp=houstonmain>
  - 2) UH Victoria: <https://paymentworks.com/login/saml/?idp=houstonvictoria>
  - 3) UH Clear Lake: <https://paymentworks.com/login/saml/?idp=houstonclearlake>
  - 4) UH Downtown: <https://paymentworks.com/login/saml/?idp=houstondowntown>
2. Click “ Vendor Master Updates”



3. Drop down and click “ Setup and Manage Supplier Portal”



4. Click “ Suppliers tab”



## Part II 3 Easy Steps to send an invitation

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

ONBOARD START	UPDATED-	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/26/2020	11/02/2020	WALSH STREET	Clicked	Email Validated	Submitted	Progress bar
11/02/2020	11/02/2020	THE UNIVERSITY OF HOUSTON	Clicked	Email Validated	Submitted	Progress bar
10/29/2020	11/02/2020	ADAMS COMPANY	Clicked	Email Validated	Submitted	Progress bar
10/29/2020	11/02/2020	WALSH STREET	Clicked	Email Validated	Submitted	Progress bar
10/29/2020	11/02/2020	THE UNIVERSITY OF HOUSTON	Clicked	Email Validated	Submitted	Progress bar
10/29/2020	11/02/2020	WALSH STREET	Clicked	Email Validated	Submitted	Progress bar
10/29/2020	11/02/2020	ADAMS COMPANY	Clicked	Email Validated	Submitted	Progress bar
11/02/2020	11/02/2020	UNIVERSITY OF HOUSTON	Delivered	No Account	Not Started	Progress bar
10/26/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	Email Validated	Submitted	Progress bar
10/27/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	Email Validated	Submitted	Progress bar

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

- 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 be rushed to allow us to verify that we can do business with the vendor based on the documentation provided.

ONBOARD START	UPDATED-	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
10/27/2020	11/02/2020	ADAMS COMPANY	Opened	No Account	Not Started	Progress bar
10/27/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	Email Validated	Submitted	Progress bar
10/28/2020	11/02/2020	ADAMS COMPANY	Clicked	Email Validated	In Progress	Progress bar
10/28/2020	11/02/2020	UNIVERSITY OF HOUSTON	Opened	No Account	Not Started	Progress bar
10/21/2020	11/02/2020	ADAMS COMPANY	Clicked	Email Validated	Complete Vendor # 0000153782	Progress bar
10/27/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	Email Validated	Complete Vendor # 0000149158	Progress bar
10/22/2020	11/02/2020	ADAMS COMPANY	Clicked	Email Validated	Complete Vendor # 0000147912	Progress bar
10/26/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	Email Validated	Complete Vendor # 0000157008	Progress bar
10/29/2020	11/02/2020	UNIVERSITY OF HOUSTON	Opened	No Account	Not Started	Progress bar
10/28/2020	11/02/2020	UNIVERSITY OF HOUSTON	Clicked	No Account	Not Started	Progress bar

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