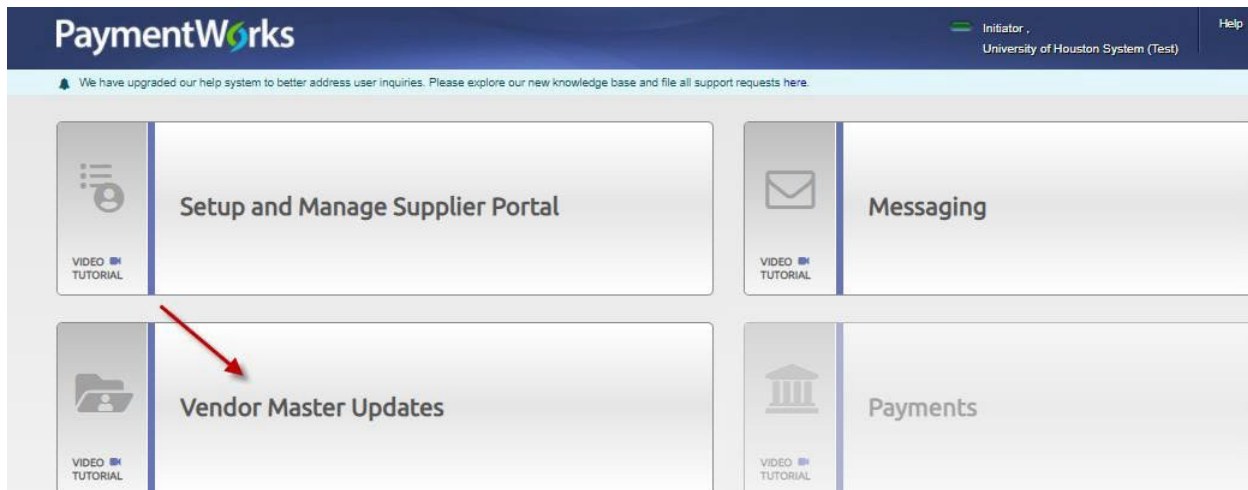


Steps to follow before sending an Invitation

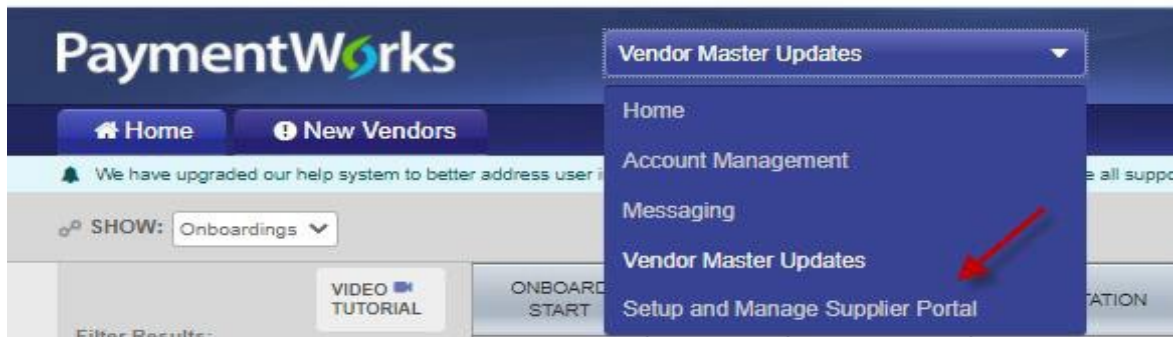
Initiator Role/Duplicated Registration

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

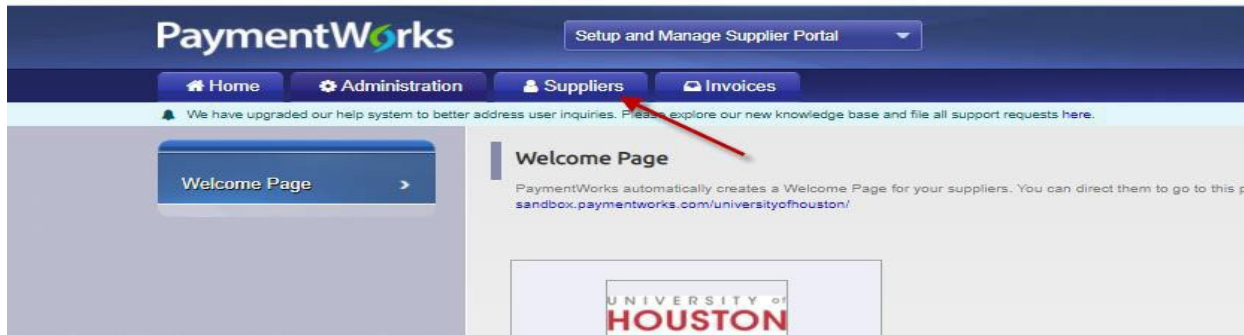
1. Log in to PaymentWorks at one of the link below:
 - 1) UH Main Campus: <https://paymentworks.com/login/saml/?idp=houstonmain>
 - 2) UH Victoria: <https://paymentworks.com/login/saml/?idp=houstonvictoria>
 - 3) UH Clear Lake: <https://paymentworks.com/login/saml/?idp=houstonclearlake>
 - 4) UH Downtown: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



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:

Site Code:

City:

State:

Zipcode:

Country:

Address Type:

Contact Email:

Connected:

SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
bigtex									<input type="button" value="View Request"/>

Part II 3 Easy Steps to send an invitation

- Navigate** 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).

- 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	...	Opened	No Account	Not Started	...
10/27/2020	11/02/2020	...	Clicked	Email Validated	Submitted	...
10/28/2020	11/02/2020	...	Clicked	Email Validated	In Progress	...
10/28/2020	11/02/2020	...	Opened	No Account	Not Started	...
10/21/2020	11/02/2020	...	Clicked	Email Validated	Complete Vendor # 0000153782	...
10/27/2020	11/02/2020	...	Clicked	Email Validated	Complete Vendor # 0000149158	...
10/22/2020	11/02/2020	...	Clicked	Email Validated	Complete Vendor # 0000147912	...
10/26/2020	11/02/2020	...	Clicked	Email Validated	Complete Vendor # 0000157008	...
10/29/2020	11/02/2020	...	Opened	No Account	Not Started	...
10/28/2020	11/02/2020	...	Clicked	No Account	Not Started	...

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.