PaymentWorks - Onboarding a Supplier

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Contact Us: vendors@utdallas.edu
PaymentWorks

• PaymentWorks is the supplier onboarding system used by the University of Texas at Dallas.
  • Suppliers will be able to provide documents through the new supplier portal instead of relying on email communications
  • Suppliers will be able to maintain their own data for updates once setup within PaymentWorks
  • Campus users will now have visibility to the workflow and setup status within the PaymentWorks portal
  • Both campus users and suppliers will be able to see invoice information within the new portal
  • Additional data security is provided by PaymentWorks to ensure our supplier information in accurate and verified
Setting Up a New Vendor / Supplier

Below is the procedure for the supplier setup process.

1. The department should check within eProcurement to see if their supplier already exists or is currently inactive.
2. The department submits the appropriate form/requisition in eProcurement with 'New Vendor Needed' added as the supplier. 'New Vendor Needed' is available for use on all form/requisition types in eProcurement. Please refer to eProcurement Resources for more information on the correct form/requisition to use.
3. The department exports the requisition into a document.
4. The department submits an invitation in PaymentWorks with the documents shown in the table below attached.
   - Note: If you have more than one document, they will need to be merged into one. For instructions on how to merge your documents, please refer to Merge Documents by Combining Files in Acrobat.
5. The department monitors email communications sent by PaymentWorks to track and facilitate the onboarding process.
6. Comment on the submitted requisition noting the provided vendor ID # sent in the final email communication from PaymentWorks (Email Title: Payee Onboarding Complete). Tag the buyer, if assigned to the requisition, with your comment.
Onboarding Process Flow - Step #1

1. The department should check within eProcurement to see if their supplier already exists or is currently inactive.
Onboarding Process Flow – Step #1

1. Log into eProcurement.

2. Click on the supplier icon on the left navigation bar.

3. Search for the supplier by supplier name or supplier ID.
   • NOTE: If searching by supplier ID, you must include the leading zeros to yield a result.
Onboarding Process Flow - Step #1

- The green check mark indicated a supplier is active and available for use.
- The red X indicated a supplier exists within eProcurement but is currently inactive. If the supplier is inactive but does exist, they should email vendors@utdallas.edu so that the reason for inactivation can be determined.
- If the supplier is not present, the supplier does not have a profile in our system and should be onboarded for use if needed.
2. The department submits the appropriate form/requisition in eProcurement with ‘New Vendor Needed’ added as the supplier. ‘New Vendor Needed’ is available for use on all form/requisition types in eProcurement. Please refer to eProcurement Resources for more information on the correct form/requisition to use.

![Procurement Management Tools and Forms](attachment:procurement_management_tools_and_forms.png)
Onboarding Process Flow – Step 2
Onboarding Process Flow - Step #3

3. The department exports the requisition into a pdf document.
Onboarding Process Flow - Step #4

4. The department submits an invitation in PaymentWorks with the documents shown in the table below attached.
   
   - Note: If you have more than one document, they will need to be merged into one. For instructions on how to merge your documents, please refer to [Merge Documents by Combining Files in Acrobat](#).

<table>
<thead>
<tr>
<th>Supplier Request Type (Domestic or Foreign)</th>
<th>Required Documentation &amp; Information</th>
<th>Requisition / Form Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>True Vendor</td>
<td>Quote/Business Justification</td>
<td>Non-catalog</td>
</tr>
<tr>
<td></td>
<td>Export submitted document in eProcurement and attach</td>
<td>requisition OR Catalog requisition</td>
</tr>
<tr>
<td>Independent Contractor</td>
<td>Quote/Business Justification</td>
<td>Independent</td>
</tr>
<tr>
<td></td>
<td>Export submitted document in eProcurement and attach</td>
<td>Contractor requisition</td>
</tr>
<tr>
<td>Reimbursement</td>
<td>Export submitted document in eProcurement and attach</td>
<td>Request for Check</td>
</tr>
<tr>
<td>Student (Non-Reimbursement Requests)</td>
<td>Email correspondence from Financial Aid (<a href="mailto:tascholarships@utdallas.ed">tascholarships@utdallas.ed</a>) noting student payment can be processed through eProcurement</td>
<td>Request for Check</td>
</tr>
<tr>
<td></td>
<td>Export submitted document in eProcurement and attach</td>
<td></td>
</tr>
</tbody>
</table>
Onboarding Process Flow - Step #4

1. Gemini for Departments-> External Links-> PaymentWorks
2. Log into PaymentWorks and select the Vendor Master Updates tile.
3. Click on the New Vendors Tab.
Onboarding Process Flow - Step #4

4. Click on the ‘Send Invitation...’ button.

5. Complete the invitation
5. The department monitors email communications sent by PaymentWorks to track and facilitate the onboarding process.
Onboarding Process Flow - Step #5

UTD Department

- Invitation Sent
- Invitation Approved
  - Payee Invitation Approved - {Supplier Name}
- Invitation Re-submit
- Invitation Rejected
  - Payee Invitation Rejected - {Supplier Name}

Procurement

- Supplier Received Invitation
  - Payee Invitation Received - (Supplier Name)
- Supplier Completed Registration Form
  - Payee Registration Submitted - (Supplier Name)
- Registration Form Re-Submitted
  - Payee Registration Re-Submitted - (Supplier Name)

Supplier

- Supplier Onboarded Completed
  - Payee Onboarding Complete - (Supplier Name)
- Registration Form Approved
  - Payee Registration Approved - (Supplier Name)
- Registration Form Returned
  - Payee Registration Returned - (Supplier Name)

UTD Workflow

PeopleSoft / Jaggaer Integration

THE UNIVERSITY OF TEXAS AT DALLAS
Office of Budget and Finance
6. Comment on the submitted requisition noting the provided vendor ID # sent in the final email communication from PaymentWorks (Email Title: Payee Onboarding Complete). Tag the buyer, if assigned to the requisition, with your comment.
Onboarding Process Flow - Step #6
Onboarding Process Flow

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Supplier Updates

• Existing PaymentWorks Profile
  o If a supplier already has a connected profile in PaymentWorks, they can log in at any time and make updates to their information.
Supplier Updates

• Supplier Not in PaymentWorks
  o If a supplier has not created a profile in PaymentWorks but is currently an active supplier with UTD (and active in ePro), the respective department should send an invitation to onboard the supplier into ePro.
    ▪ Sent invitation should note existing vendor ID in description field.
  o If a supplier has not created a profile in PaymentWorks but is currently an active supplier with UTD (and inactive in ePro), email vendors@utdallas.edu to review.
Questions?