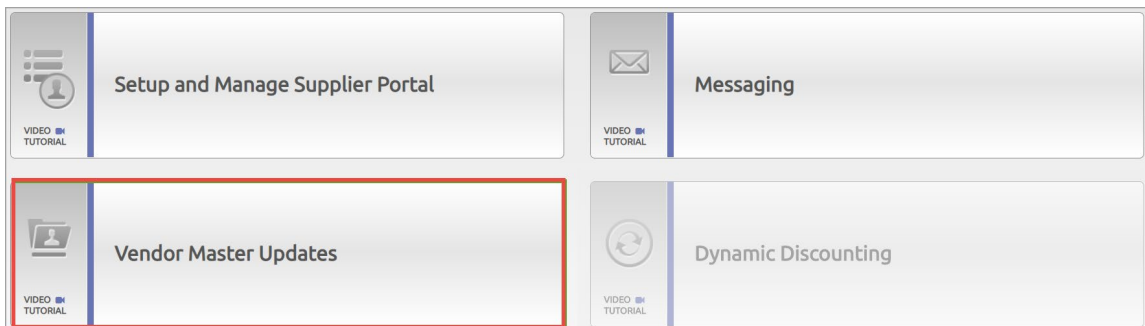
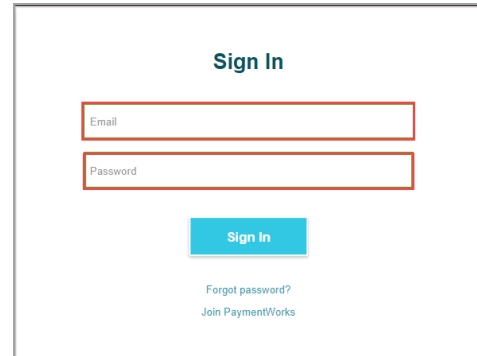


## Track Supplier Onboarding Status

The purpose of this job aid is to explain how to review and track the Supplier onboarding status.

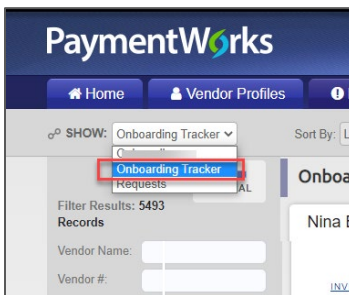
NOTE: Suppliers are available for purchasing goods/services when listed on the **Vendor Profiles** tab.

1. Navigate to PaymentWorks by going to:  
myapps.uta.edu and click on the PaymentWorks icon  
**OR**
2. Log in with your UTA email address and NetID password.
3. Click on **Vendor Master Updates**.

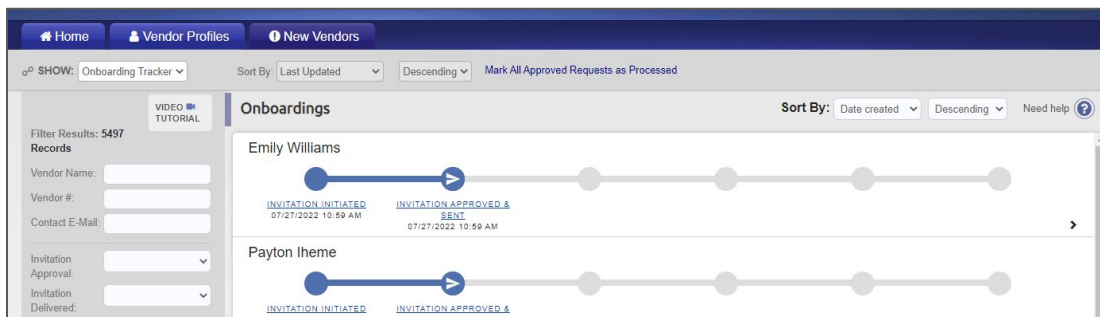


4. Click on the **New Vendors** tab.

**Note:** It will default to the **Requests Page**. Choose **Onboardings Tracker** from the drop - down menu



The **Filter Results** panel is displayed, and you can search by the Supplier name or email address.

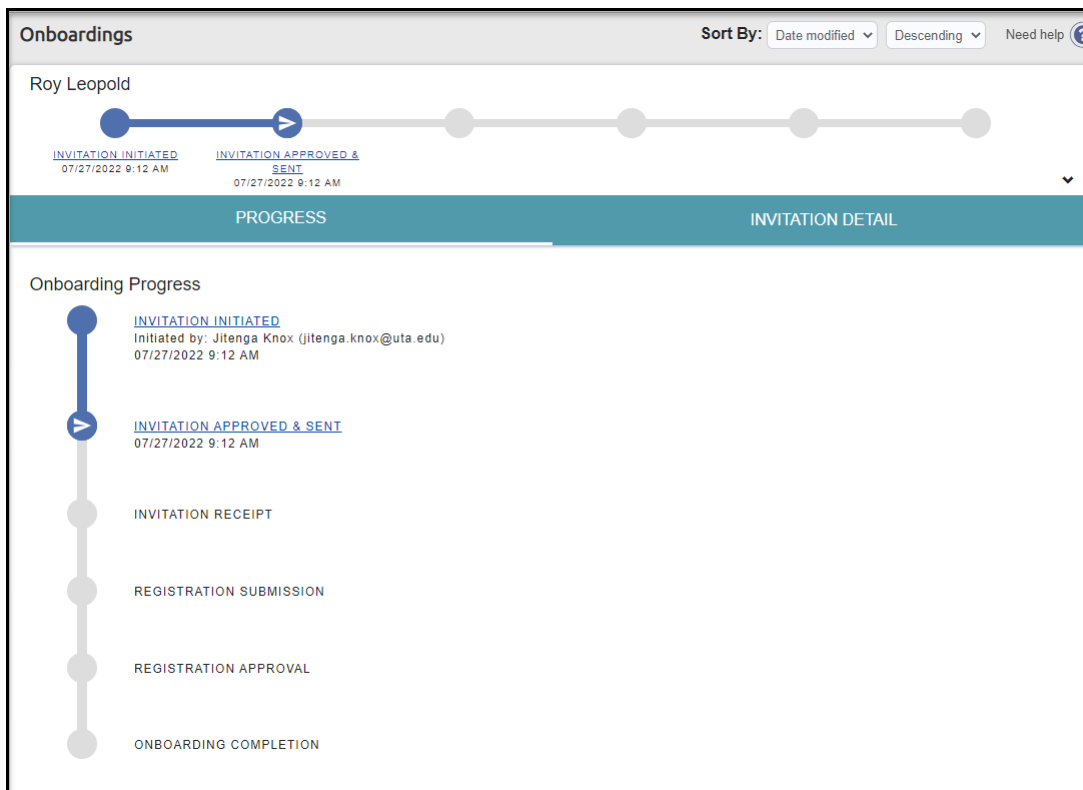


Onboardings expand to the details view when the user clicks the arrow to the bottom right of each row. The details view includes up to three tabs depending on where the payee is in the onboarding process:

1. Progress - created when the onboarding is initiated
2. Invitation Detail - created when the onboarding is initiated
3. Account Info - created when the payee verifies their account

The Progress tab of the details view displays the following:

- The current status
- The last previous status for each of the completed steps
- Similar to the list view, each status is hyperlinked to a tab or page that displays more details if applicable
- A timestamp for each status
- The user name and email address of any user who actioned this onboarding
- Any messages sent to the payee with the invitation approval, invitation rejection, or registration return
- If a registration was returned, the number of submissions for this onboarding
- Which steps remain until the onboarding is complete



The screenshot displays the 'Onboardings' interface for a user named Roy Leopold. At the top, there are sorting options: 'Sort By: Date modified', 'Descending', and a 'Need help' link. Below the user name, a progress bar shows the current status 'INVITATION APPROVED & SENT' with a play button icon, and a dropdown arrow is visible on the right. The main content area is titled 'Onboarding Progress' and features a vertical timeline with six steps: 'INVITATION INITIATED' (initiated by Jitenga Knox), 'INVITATION APPROVED & SENT', 'INVITATION RECEIPT', 'REGISTRATION SUBMISSION', 'REGISTRATION APPROVAL', and 'ONBOARDING COMPLETION'. The first two steps are active, while the others are greyed out.

5. If you click on the **Invitation Initiated**, the view expands to display the contents of the original invitation including the personalized message if added.

**Invitation Details:** close

Initiator: Initiator (utapw2020+initiator@gmail.com)	Vendor Name: Foreign Vendor 1	Contact E-mail: utapw2020+foreignvendor1@g mail.com	Initiated: 04/21/2020	Email Sent: 04/21/2020
Personalized Message: Hello hello hello..... 123581				
Custom Fields:				
Description of Goods and Services : TAcos				
Initiator Department : A good one				
Initiator Phone Number : 8172222222				
Reason for Inviting the Supplier : Product and Service				

### 6. Invitation Statuses

Status	Explanation
Pending Approval	Invitation is in queue to be reviewed.
Opened	Vendor has opened the invitation email.
Clicked	Vendor has received the invitation email and clicked on the link to get started.
Rejected	Supplier has rejected the invitation request.
Undeliverable	Invitation delivery was unsuccessful.
Cancelled	The invitation has been cancelled.

### 7. Vendor Account Statuses

Status	Explanation
No Account	Vendor has not used their invitation to create their account.
Registered	Vendor account was created but not activated.
Email Validated	Vendor has created and activated their account.

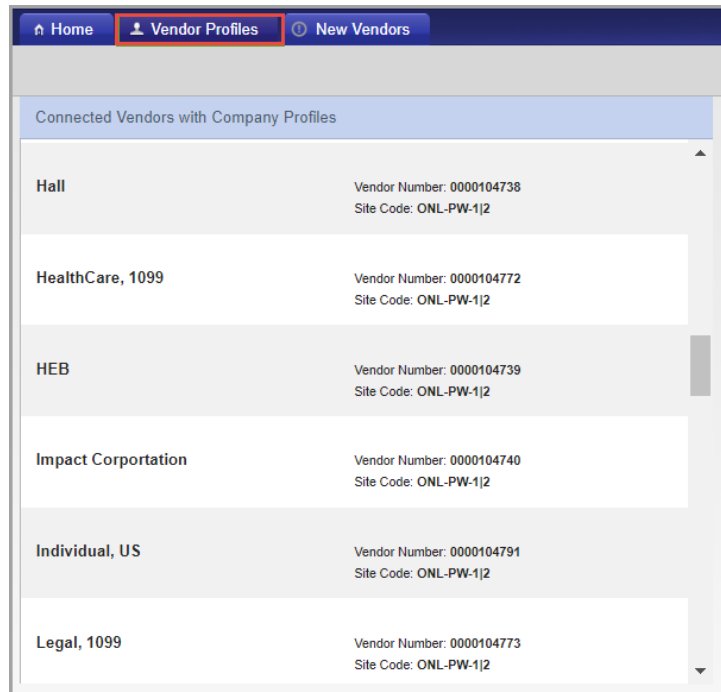
### 8. New Vendor Registration Statuses

Status	Explanation
Not Started	Supplier has not entered information on their registration.

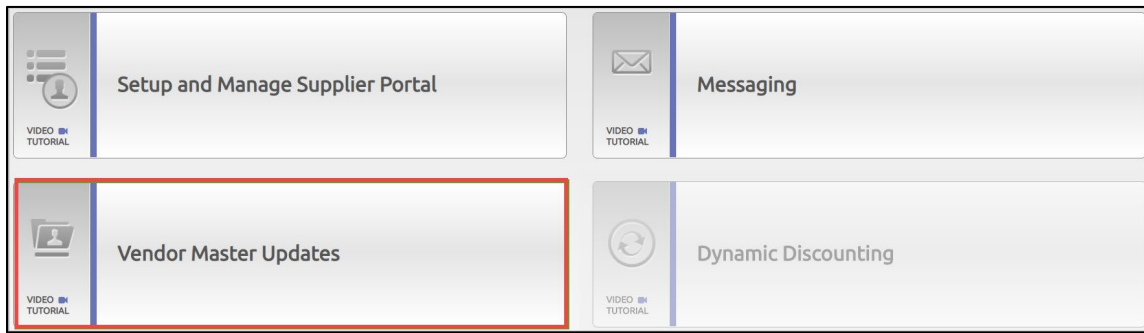
In Progress	Supplier has started entering information on the registration but has not submitted.
Submitted	Supplier has submitted their registration.
Returned	Registration has been returned to the supplier in order for a correction to be made. The supplier will be emailed directly with the requested correction. They will also receive a message in their “Messages” tab.
Approved	Registration has been approved.
Rejected	Supplier has rejected the registration.
Complete	Supplier has been notified of their approval; the supplier record has been created, and the vendor number has been issued. The supplier number will appear under “New Vendor Registration.”
Processed	Registration has been processed and sent to UT Share for approval.

9. When the Supplier is listed on the **Vendor Profiles** tab, the Supplier is **connected** and available to use for purchasing goods and/or services at UTA.

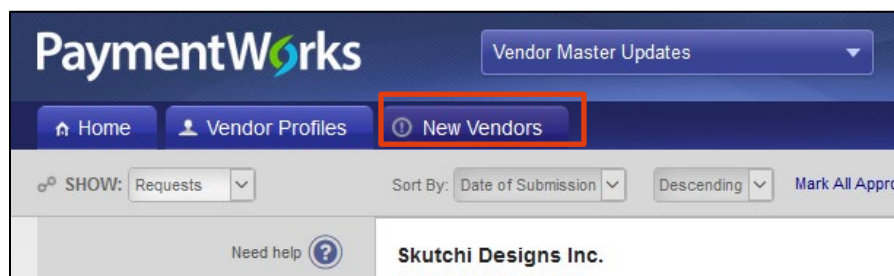
Initiators can also track the Supplier’s registration status after it has been submitted.



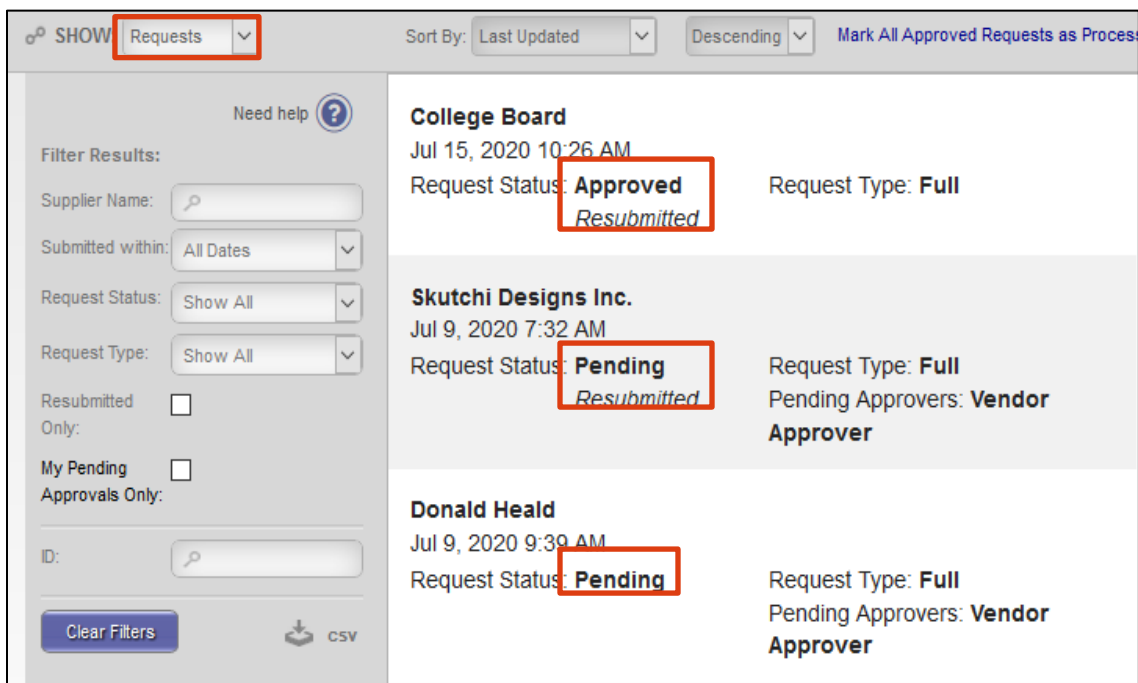
10. Click on **Vendor Master Updates**.



11. Click on the **New Vendors** tab. You can track the Supplier's registration status in the **Request** view.



12. The Supplier's record displays the request status after the submission of the registration.



13. Click on the Vendor to see more details. If Request Status is **Returned**, the Initiator can View the message and see why the registration was returned.

**LUMBIRD INC**

Jul 15, 2020 2:25 AM

Request Status: **Returned** Request Type: **Full**

[View Message](#)