PaymentWorks Profile Detail Guide

Main Navigation

This bar will appear on the top of almost all pages in the PaymentWorks system.

A. Clicking this box on any page will return you to your login/home page.
B. This section will display the name of the user logged in and the company that they are affiliated with for this account.
C. The ‘Help’ button will open a new tab that takes you to a PaymentWorks Help Center to get an answer to your question.
D. The ‘Account’ button will take you to more information on the account you are logged into the system with.
   a. Under the ‘Personal Information’ section, you can view the information related to this user login. This page also allows you to ‘Edit’ your current settings. Each page in PaymentWorks contains a “Need Help?” button that will take you to a help screen on that respective page.
b. Under the ‘Company Information’ section, you can view information on the company that this profile is affiliated with. Note that this information can not be edited.

E. The ‘Logout’ button will log the user account out of the PaymentWorks system.
F. This ‘Payment Lookup’ section allows you to look up payment information on a specific supplier.
G. This ‘Messaging’ section will display a list of the pushed News Updates for review.
H. This ‘Setup and Manage Supplier Portal’ section allows you to view information on the existing vendors within the PaymentWorks system. (Detail below)
I. This ‘Vendor Master Updates’ section is used to send new vendor invites and review the status of those that have already been sent. (Detail below)
Setup and Manage Supplier Portal

This section has four tabs:

1. Home – this tab returns you to your original login screen
2. Administration – this is the default tab. Under this tab, you can see a link to a sample Welcome Page for UTD.
3. Suppliers – Under the ‘Suppliers’ tab, you will be provided with a list of all the suppliers existing in UTD’s PaymentWorks instance. Using the search functionality on the left-hand side of this screen, you can narrow down your search results.
4. Invoices – This tab shows a list of all the invoices related to the suppliers existing in UTD’s PaymentWorks instance. Using the search functionality on the left-hand side of this screen, you can narrow down your search results. The results on this page may also be exported using the CSV button.
Vendor Master Updates

Using the search functionality on the left-hand side of this screen, you can narrow down your search results based on set up status.

By clicking the “Send Invitation” button at the bottom of this section, a new vendor invitation can be sent.