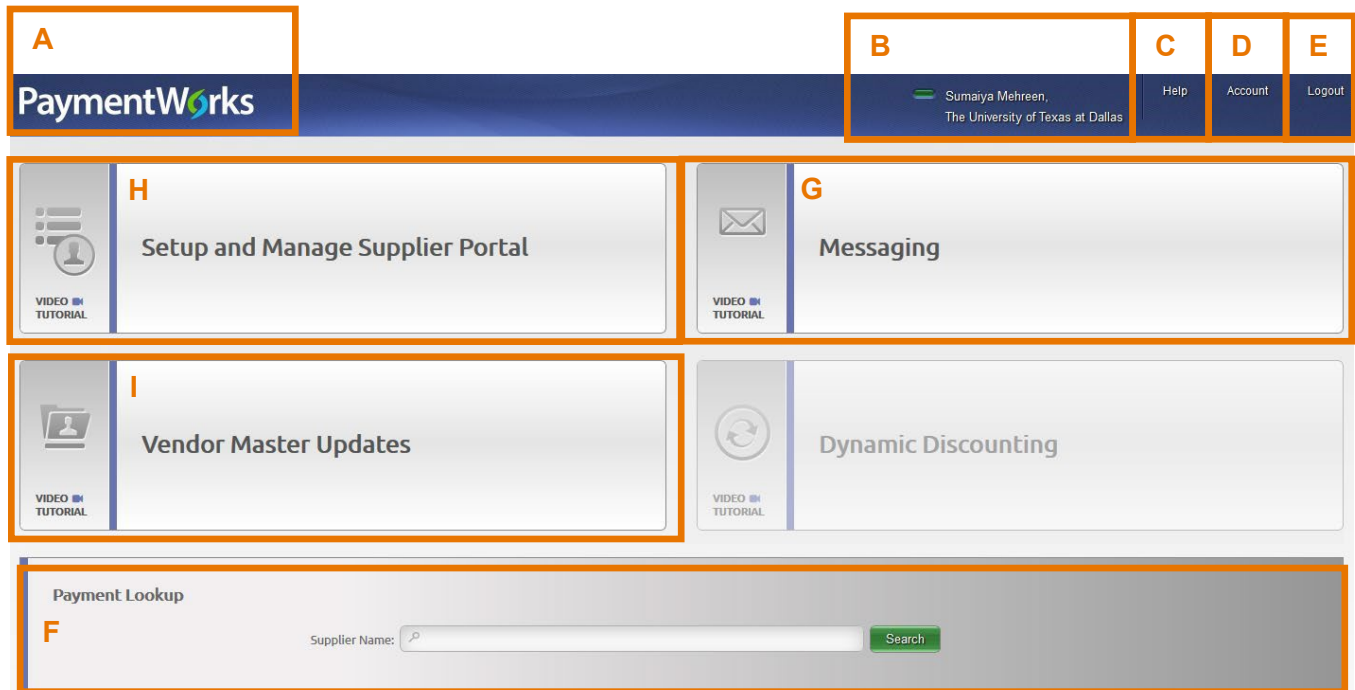


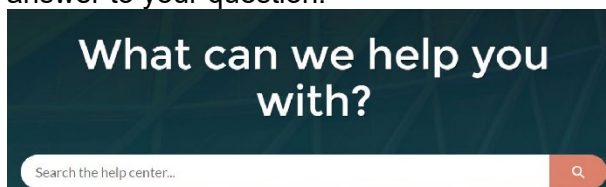
PaymentWorks Profile Detail Guide

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.

The screenshot shows the 'PaymentWorks' interface with the 'Account Management' dropdown menu. The user is logged in as 'Sumaiya The Unive'. The 'Account' section is active, and the 'Personal Information' form is displayed. The form includes fields for First Name (Sumaiya), Last Name (Mehreen), Email (smehreen@utdallas.edu), Telephone, Title, Forward Messages to Email (Disabled), Default Language (English), and Allow Browser Diagnostics Capture (Yes). A 'Need help' link is available. The 'Edit' button is at the bottom right.

First Name:	Sumaiya
Last Name:	Mehreen
Email:	smehreen@utdallas.edu
Telephone:	
Title:	
Forward Messages to Email:	Disabled
Default Language:	English
Allow Browser Diagnostics Capture:	Yes

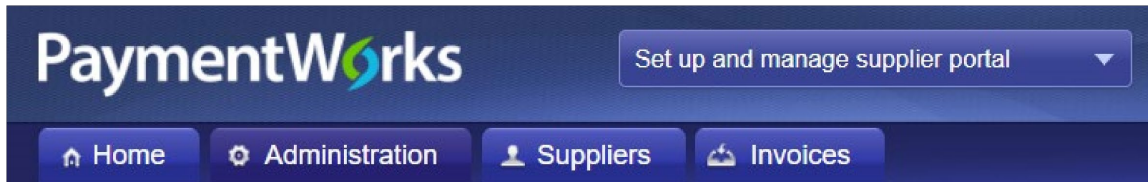
- b. Under the 'Company Information' section, you can view information on the company that this profile is affiliated with. Note that this information can not be edited.

The screenshot shows the 'PaymentWorks' interface with the 'Account Management' dropdown menu. The user is logged in as 'Sumaiya The Unive'. The 'Account' section is active, and the 'Company Information' form is displayed. The form includes fields for Company Name (The University of Texas at Dallas), Corporate Address (800 W Campbell Rd), City (Richardson), State/Province (Texas), Country (United States of America), Zip/Postal Code (75080-3021), and Main Phone Number. A 'Need help' link is available.

Company Name:	The University of Texas at Dallas
Corporate Address:	800 W Campbell Rd
City:	Richardson
State/Province:	Texas
Country:	United States of America
Zip/Postal Code:	75080-3021
Main Phone Number:	

- 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.

This is a screenshot of the search filter section on the 'Suppliers' tab. At the top right of the section is a 'Need help' link with a question mark icon. Below this are several search fields, each with a magnifying glass icon inside the input box: 'Supplier Name:', 'Vendor Number:', 'Site Code:', 'City:', 'State:' (a dropdown menu currently showing 'State'), 'Zipcode:', 'Country:', 'Address Type:' (a dropdown menu currently showing 'Show All'), 'Contact Email:', and 'Connected:' (a dropdown menu currently showing 'Show All'). At the bottom left of the filter section is a blue button labeled 'Clear'.

4. Invoices – This tab shows a list of all the invoices related to the suppliers existing in UTD's PaymentWorksinstance. 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.

Need help ?

Filter Results:

Date Type:

Invoice Date ▼

Date Range:

All ▼

Start Date:

mm/dd/yyyy

End Date:

mm/dd/yyyy

Vendor Number:

Supplier Name:

Invoice Number:

Purchase Order:

Ref Key:

Amount Type:

Invoice Amount ▼


Min Amount

Max Amount

Status:

All ▼

Clear Filters

 CSV

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.

The screenshot shows a web application interface for managing vendors. At the top, there are two tabs: 'Home' and 'New Vendors'. Below the tabs, there is a 'SHOW:' dropdown menu currently set to 'Onboardings'. To the right of the search filters is a 'VIDEO TUTORIAL' button. The 'Filter Results:' section contains several search criteria: 'Vendor Name:', 'Vendor #:', and 'Contact E-Mail:', each with a search icon and a text input field. Below these are five dropdown menus for 'Invitation Approval:', 'Invitation Delivered:', 'Account Created:', 'Registration Form:', and 'Source:'. There is also a search icon and text input field for 'Invitation Initiator:'. At the bottom of the filter section is a 'Clear Filters' button. Below the filter section is a large 'Send Invitation...' button.

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