

CANDEX

The fast track

Payee Guide





PAYEE

Payee Invite

- This email sent once the PO is approved
- Reminders sent regularly to get Payee acceptance: :
1, 2, 4, 7, 14, 17, 28, 10, 21 days

From: VCU (via Candex)
Subject: Action Required: Accept Payment

Speaking Engagement - January

Virginia | PO#: 67564453535

From

VCU



[Request Payment](#)

To: zach@miller.com

A payment of 500 USD is authorized to you.

Items:

- Speaking Engagement - January

[Click here](#) to get paid.

VCU uses Candex to engage and pay its valued and trusted partners without going through a cumbersome setup process

Candex allows business to engage and exchange payments in a compliant way without cumbersome setup in each other's financial systems

View [FAQs](#)

Support at support@candex.com

CANDEX

Simple Payee Registration

- Users can select their language
- To be filled out ONLY on initial engagement

CANDEX

[How it Works](#)
[For Enterprise](#)
[Pricing](#)
[About](#)
Sign In

Candex makes it easy to pay and get paid

A. If Payee is being paid as part of company

Email

Language

This payment is to my company

This payment is to me personally

B. If Payee is being paid as an individual

First Name

Phone Number

Create Password

Last Name

- select -

Confirm Password

Company

Job Title

Are you a small business? Yes No

Are you a diverse supplier? Yes No

I agree to the [Candex Terms of Use](#)

I agree to get emails & notifications about engagements and payments

I agree to receive general Candex updates through email (optional)

We'll always treat your personal details with the utmost care and will never sell it to other companies for marketing purposes. You can change your preferences in your profile at any time, see [Privacy Policy](#) for more details.

Register Now



PAYEE

Simple Payee Registration

→ Users can select their language

→ To be filled out **ONLY** on initial engagement

The screenshot shows a web browser window with the Candex logo in the top left. The navigation menu includes 'How it Works', 'For Enterprise', 'Pricing', 'About', and a 'Sign In' button. The main heading reads 'Candex makes it easy to pay and get paid'. The registration form contains the following fields and options:

- Email:** Input field with 'zack@gmail.com' entered.
- Language:** Dropdown menu with 'English' selected.
- Account Type:** Radio buttons for 'This is a company account' (unselected) and 'This is an individual account' (selected).
- First Name:** Input field.
- Last Name:** Input field.
- Phone Number:** Input field with a dropdown menu set to '- select -'.
- Password:** Input field.
- Confirm Password:** Input field.
- Agreements:** Three checkboxes for 'I agree to the Candex Terms of Use', 'I agree to get emails & notifications about engagements and payments', and 'I agree to receive general Candex updates through email (optional)'. All are currently unchecked.
- Disclaimer:** A paragraph stating that personal details will be handled with care and not sold to other companies for marketing purposes.
- Register Now:** A blue button at the bottom of the form.



PAYEE

Add Payment Details

Miller & Sons

- My Activity 1
- My Requests
- Order Feed
- Settings

ORDERS
speaking engagement - ja.. 1

Zack Miller
Online

Request Payment

search ? Sign out

Speaking Engagement - January

PO# 67564453535

Invite Finance

After you request payment and Candex verifies your banking information, Candex will invoice Buyer on your behalf. The funds should reach your account within 3 business days of Buyer's acceptance of Candex's invoice.

Pay To: [Add Detail](#)

Bill To:
Candex Solutions Limited
420 Lexington Avenue, Suite 300
New York, NY 10170
Tax ID #: 45-2805653

Deliver To:

VCU
United States

Item

Designate the "Pay To" and upload in

Submit

Skip for Now

Add Detail



Personal Details

Name

Country

Address

City

Zip Code

Tax Classification

W9



Bank Details

Bank Name

Bank Country

Currency

Account Holder

Account #

ACH Routing#

+ Add intermediary bank

Upload File

Add

Request Payment

Miller & Sons

- My Activity 1
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ORDERS

speaking engagement - ja.. 1

Zack Miller
Online

Request Payment

search ? Sign out

Speaking Engagement - January

PO# 67564453535

Click here to invite finance team to complete payment request

Invite Finance

After you request payment and Candex verifies your banking information, Candex will invoice Buyer on your behalf. The funds should reach your account within 3 business days of Buyer's acceptance of Candex's invoice.

Pay To: (US / USD) Zack Miller

Account: Citibank: *****291

Bill To:

Candex Solutions Inc
420 Lexington Avenue, Suite 300
New York, NY 10170

Deliver To:

VCU
907 Floyd Ave, Richmond,
VA 23284, United States

Tax ID #: 45-2805653

Item (USD)

Speaking Engagement - January

You Get Tax

500

0

view/edit

Click here to edit taxes. Payees not needing to claim taxes must enter 0.

Total Amount 500

Tax -

Due to You 500

Submit

Skip for Now

Requisition Status Updates

- A wall of history compiles on each order and important notifications are sent to Buyers' and Payees' emails.
- Candex reminds vigorously for the required actions of the Payees
- Candex proactively notifies Buyers if order acceptance has not occurred in 10 days

Miller & Sons

- [My Activity](#) 1
- [My Requests](#)
- [Order Feed](#)
- [Settings](#)

ORDERS

- [speaking engagement - ...](#) 1

Zack Miller
Online

Speaking Engagement - Janu

Sign out

Speaking Engagement - January 500
By: Apr 4 | To: VA

April 3, 2022

Created by David London
David London invited zack@miller.com
A reminder to accept terms was sent to zack@miller.com
zack Miller added john.smith@miller.com

C

Payment 10:42 AM

Click to comment

Payment has been accepted by Zack Miller

[view detail](#)

April 5, 2022

C

Re: [Payment](#) 11:23 AM

Candex has issued an invoice to VCU

C

Re: [Payment](#) 11:23 AM

VCU has paid Candex and the funds will be transferred to Zack Miller within 3 business days.

July 9, 2022

C

Re: [Payment](#) 5:05 PM

Miller & Sons was paid

+ write something...

← Payment Details

Seller:

Miller & Sons ▾
By zack Miller

Buyer:

VCU ▾
By Candex
#US74389010

Amount	USD 500.00
Sales Tax	-
Total Amount	500.00
Candex ID	345435345345
PO #	CTPO1239045
Original Upload	Apr 3
Last Update	Apr 3
Invoice Date	Apr 5
Payment Terms	3 days
Paid to Candex	Apr 12
Paid to Seller	Apr 12

[Marketing](#)

Speaking Engagement - January (Apr 3)

Service	USD 500.00
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Bill to:
Candex Solutions, Inc.

Pay to:
Miller & Sons, LLC

Ship to:
Virginia, United States



PAYEE

Withholding

1. Default withholding amount is shown in table
2. Click "Add Detail" to launch Tax popup
3. Select 0% from the dropdown if withholding is not applicable

Miller & Sons

- My Activity 1
- My Requests
- Order Feed
- Settings

ORDERS

- speaking engagement - ja.. 1

Zack Miller
Online

Request Payment

Sign out

Invite Finance

Speaking Engagement - January

PO# 67564453535

After you request payment and Candex verifies your banking information, Candex should reach your account within 3 business days of Buyer's acceptance of Candex

Pay To: (UK / GBP) Zack Miller

*Account: Citibank: *****291*

Deliver To:
VCU
907 Floyd Ave, Richmond,
VA 23284, United States

Bill To:
Candex Solutions Inc
420 Lexington Avenue, Suite 300
New York, NY 10170
Tax ID #: 45-2805653

Item (USD)	You Get	Tax
Speaking Engagement - January	500	0
	500	

Total Amount	500
Tax	-
Total Invoice	500
Withholding	(150)
Net Due	350

Submit
Skip for Now

? Sign out

Speaking Engagement - January

Deliver-to: VCU
United States

Amount: 500 USD

Tax: USD

Withholding: 30% 150 USD

-Select-

0%

1%

2%

3%

4%

5%

7%

8%

9%

10%

15%

20%

25%

30%

view/edit

Save



PAYEE

Edit Entity & Bank Details

→ To update entity details, select Settings, select Entities

→ Click Save

Miller & Sons

- My Activity 1
- My Requests
- Order Feed
- Settings

PERSONAL SETTINGS

- Preferences
- Profile

COMPANY SETTINGS

- Setup
- Users & Teams
- Entities

Zack Miller
Online

Payment Entities

search

Sign out

Entity

Name

Country

Address

City

Zip code

Tax ID #

W9

Add File

Receiving Funds

Bank Details

Bank Country

Currency

Bank Name

Account Name

Account #

ACH Routing #

[+ add intermediary bank](#)

Bank Verification

Use bank statement or voided check

Miller&Sons_Citi.pdf
[replace](#)

Save

Back



Miller & Sons, LLC [edit](#)

1234 Main St.
St. Louis, MO 28372
United States

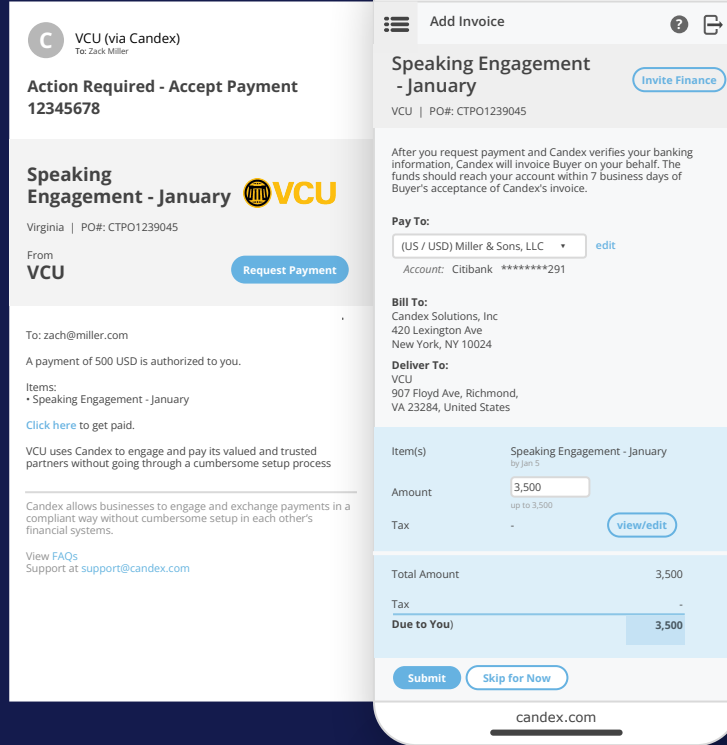
Tax ID: 438439428



Payee

Mobile Payment Request

Submitting payment request in Candex is available via Mobile Browser



Questions?

www.candex.com/help | support@candex.com