

# CANDEX

## The fast track

Payee Guide



# 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

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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](mailto:support@candex.com)

**CANDEX**

# Simple Payee Registration

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



[How it Works](#)
[For Enterprise](#)
[Pricing](#)
[About](#)
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## Candex makes it easy to pay and get paid

**A. If Payee is being paid as part of company**

**B. If Payee is being paid as an individual**

Email

zack@miller.com

Language

English

☐ This payment is to my company
 ☐ This payment is to me personally

First Name

Last Name

Phone Number

- select -

Create Password

Company

Job Title

Confirm Password

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

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# Simple Payee Registration

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

CANDEX

How it WorksFor EnterprisePricingAbout

Sign In

Candex makes it easy to pay  
and get paid

Email

zack@gmail.com

Language

English

☐ This is a company account

☒ This is an individual account

First Name

Last Name

Phone Number

- select -

Password

Confirm Password

☐ 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



# 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

United States

Address

City

Zip Code

Tax Classification

- select -

W9



Upload File



Bank Details

Bank Name

Bank Country

United States

Currency

USD

Account Holder ?

Account # ?

ACH Routing# ?

+ Add intermediary bank ?

Add

# Request Payment

Miller &amp; Sons

[My Activity](#)

1

[My Requests](#)[Order Feed](#)[Settings](#)

ORDERS

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

**Zack Miller**  
Online

## Request Payment

[? 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**

500

500

**Tax**

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

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ORDERS

speaking engagement - ... 1

**Zack Miller**  
Online

Speaking Engagement - Janu

VCU

500

By: Apr 4 | To: VA

April 3, 2022

Created by David London

David London invited [zack@miller.com](mailto:zack@miller.com)

A reminder to accept terms was sent to [zack@miller.com](mailto:zack@miller.com)

zack Miller added [john.smith@miller.com](mailto:john.smith@miller.com)

C

Payment

Click to comment

Payment has been accepted by Zack Miller

[view detail](#)

10:42 AM

April 5, 2022

C

Re: [Payment](#)

Candex has issued an invoice to VCU

11:23 AM

C

Re: [Payment](#)

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

11:23 AM

July 9, 2022

C

Re: [Payment](#)

Miller & Sons was paid

5:05 PM

+

write something...

Payment Details

Seller Verified

Candex Invoice

Paid by Buyer

Paid to Seller

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

Bill to:

Candex Solutions, Inc.

Pay to:

Miller & Sons, LLC

Ship to:

Virginia, United States

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PAYEE

# Edit Entity & Bank Details

→ To update entity details, select Settings, select Entities

→ Click Save

Miller &amp; Sons



My Activity

1

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## PERSONAL SETTINGS

Preferences

Profile

## COMPANY SETTINGS

Setup

Users &amp; Teams

Entities

**Zack Miller**  
Online

## Payment Entities +

search

? Sign out



## Entity

Name

Miller &amp; Sons LTDA

Country

United States

Address

1234 Main St.

City

St. Louis

Zip code

28372

Tax ID #

US

438439428

MO

W9



Add File

## Receiving Funds



## Bank Details

Bank Country

United States

Currency

USD

Bank Name

Citibank

Account Name

Miller &amp; Sons, LLC

Account #

9382930291

ACH Routing #

AAAA-BB-CC-123

[+ add intermediary bank](#)

Bank Verification

Use bank statement  
or voided checkMiller&Sons\_Citi.pdf  
[replace](#)

Save

Back

**Miller & Sons, LLC**  
1234 Main St.  
St. Louis, MO 28372  
United States  
Tax ID: 438439428[edit](#)







Payee

# Mobile Payment Request

Submitting payment request in  
Candex is available via Mobile  
Browser

**VCU (via Candex)**  
To: Zach Miller

**Action Required - Accept Payment**  
**12345678**

**Speaking Engagement - January**   
Virginia | PO#: CTP01239045

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.

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Candex allows businesses 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](mailto:support@candex.com)

**Add Invoice**



**Speaking Engagement - January**

[Invite Finance](#)

VCU | PO#: CTP01239045

After you request payment and Candex verifies your banking information, Candex will invoice Buyer on your behalf. The funds should reach your account within 7 business days of Buyer's acceptance of Candex's invoice.

Pay To:  

(US / USD) Miller & Sons, LLC [edit](#)

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

Bill To:  
Candex Solutions, Inc  
420 Lexington Ave  
New York, NY 10024

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

Item(s)	Speaking Engagement - January <small>by Jan 5</small>
Amount	<div>3,500</div> <div><small>up to 3,500</small></div>
Tax	- <div><a href="#">view/edit</a></div>
Total Amount	3,500
Tax	-
Due to You)	3,500

[Submit](#)

[Skip for Now](#)

candex.com

# Questions?

[www.candex.com/help](http://www.candex.com/help) | [support@candex.com](mailto:support@candex.com)

# Appendix

# Withholding US Payee

- 0% withholding default in the US

Miller & Sons

My Activity


My Requests

Order Feed

Settings

ORDERS

speaking engagement - ja..



Zack Miller  
Online

Request Payment

Speaking Engagement - January

PO# 67564453535

Pay To:

(US / USD) Zack Miller

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

Bill To:

Candex Solutions Inc

420 Lexington Avenue, Suite 300

New York, NY 10170

Tax ID #: 45-2805653

Deliver To:

VCU

907 Floyd Ave, Richmond,

VA 23284, United States

Item (USD)

Speaking Engagement - January

500

500

Total Amount

500

Tax

-

Total Invoice

500

Net Due

500

Submit

Skip for Now

search

Sign out

Invite Finance

Tax

Speaking Engagement - January

Deliver-to

VCU  
United States

Amount

500 USD

Tax

0

USD

Save

# Withholding Non-US Payee


1. Default 30% withholding amount is shown in table
2. Click "view/edit" to launch Tax popup
3. Change withholding if needed
4. Any change to withholding will require a reason to be entered

Miller & Sons

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[My Requests](#)
[Order Feed](#)
[Settings](#)

ORDERS

speaking engagement - ja..



Zack Miller  
Online

Request Payment

Speaking Engagement - January

PO# 67564453535

Pay To:

(UK / GBP) Zack Miller

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

Bill To:

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

Deliver To:

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

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

search

Sign out

Invite Finance

Tax

Speaking Engagement - January

Deliver-to

VCU  
United States

Amount

500 USD

Tax

0 USD

Withholding

30% 150 USD

view/edit

Withholding

1% 0.97 USD

Reason

type explanation