



CANDEX[®]

The fast track

Candex is the fast, easy & compliant way to make payments!



Why Candex?

People said our purchasing process was arduous to make payments



Blazing Fast

No need to set up Payee/Payee



Ease of Use

Quick to set payment in motion



Happy Payees

Easy to get paid



Fully Compliant

Meets organizational requirements

How does it work?



**We pay anything
from Candex**

Invoice
Pay



Pay

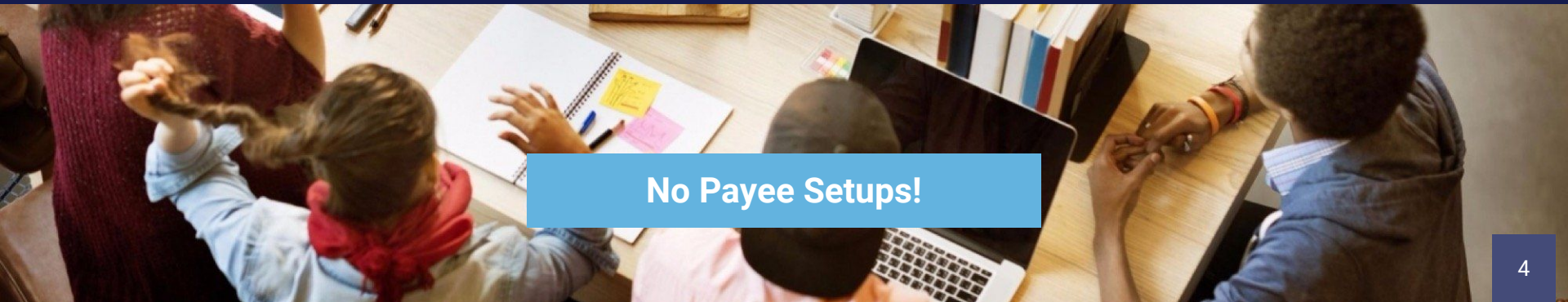


**Candex pays
your Payees**

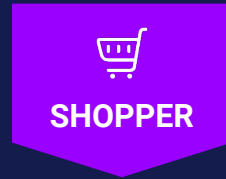


Pay for Following Categories:

Research Participant | Awards and Prizes
Stipend | Honorarium | Preceptor



No Payee Setups!



Shopper Experience



SHOPPER

Launch from Inside RealSource

- When you have a quote or scope from you Payee that is ready for approval, enter RealSource
- Once inside RealSource, click Buy from Candex or on the Candex icon to open their catalog punchout

The screenshot shows the VCU Shopping Dashboard. At the top left is the VCU logo. Below it, the page title is "Shop • Shopping Dashboard". There are two tabs: "Purchasing Dashboard" and "Shopping Dashboard", with the latter being active. The main content area is divided into two sections. The left section is a large, empty grey box. The right section is titled "Accounts Payable" and contains a grid of eight blue buttons, each with a document icon in the top right corner. The buttons are arranged in two rows of four. The top row buttons are: "CANDEX" (with a dark background and white text), "Cancel Invoice or Payment Request General", "One Time Payment Request Direct Pay", and "Revenue Refund Request Direct Pay". The bottom row buttons are: "Utility Payment Request Direct Pay", "ICA Payment Request PO-Invoice", "FMD Payment Request PO-Invoice", and "Qatar Payment Request PO-Invoice". A pink arrow points to the "CANDEX" button. Below the grid is a section titled "Accounts Payable - VCUHS / MCVP Payment Requests" with a dropdown arrow.



SHOPPER

Launch from Inside Jaegger

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VCU

Search Vendors

Quick Filters My Searches

Relationship: In Network Status: All candex

1-1 of 1 Results 200 Per Page

Company Name	Vendor Classes	Last Modified	Vendor Number	Registration Status	Registration Type	Registration Date	Vendor Type	Duns Number
Candex		10/9/2024 3:28:24 PM	V01120263	None	Full Registration		PunchOut Vendor	



Enter Your Vendor Details

- Select Service or Goods
- Choose your Category
- Add Description
- Add Vendor Email
- Enter Amount

Checkout!

VCU | CANDEX

USER GUIDES | EN

UNITED STATES

ADD REQUISITION

Type Service Goods

Category: Honorarium

Description: Speaking Engagement - January

Vendor Email: zack@miller.com
email a person, not general mailbox

Amount (Without Tax): 500 USD

[view terms](#)

Checkout Add Line-Item Cancel



SHOPPER

Finalize your Requisition in RealSource

- Complete standard VCU requisition including attaching scope or quote and choosing cost information
- Submit req for approval

Shopping Cart • 4149204 All changes saved Assign Cart Proceed To Checkout

Search for products, vendors, forms, part number, etc.

1 Item Select All

Candex • 1 Item • 500.00 USD

VENDOR DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 10/28/2024 11:24:17 AM

- Speaking Engagement - January (zack@miller.com)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Speaking Engagement - January (zack@miller.com)	88997	Each	500.00	Qty: 1 Each	500.00

ITEM DETAILS

Commodity Code

Summary

Details

For Eric Glover

Name

Total (500.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 500.00

Shipping



SHOPPER

Finalize your Requisition in RealSource

- Complete standard VCU requisition including attaching scope or quote and choosing cost information
- Submit req for approval

VCU

Requisition • 4149204

Summary Taxes/S&H PO Preview Comments Attachments History

General **Shipping** **Billing**

Cart Name	test	Ship To	Bill To
Description	no value	ATTN: Eric Glover 912 W. Grace St. 5th Floor Richmond, VA 23298-0327 United States	Accounts Payable 912 W. Grace St., 5th Floor Box 980327 Richmond, VA 23298 United States
Prepared By	Eric Glover		
Prepared For	Eric Glover		Billing Options
Department	1825-Procurement Services (1825-Procurement Services)		Accounting Date no value

Summary

Draft

Total (500.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	500.00
Shipping	0.00
Handling	0.00
Total	500.00

What's next for my order?

Requisition • 4149204

Summary Taxes/S&H PO Preview Comments Attachments History

Assign Cart Place Order



SHOPPER

Request Must be Approved by Manager

- Request status updated within RealSource
- When req is approved, a PO is automatically issued to Candex electronically
- Candex will then send an email to the Payee

The screenshot shows a web browser window with the VCU logo in the top left. The main content area features a green header with a checkmark icon and the text "Requisition 4149204 Submitted". Below this, there are two columns: "Summary" and "Options". The "Summary" column contains a table with requisition details, and the "Options" column contains links for printing, recent orders, and returning home.

Summary		Options
Requisition number	4149204	Print
Requisition status	Pending	Recent orders
Cart name	test	Return to your home page
Requisition date	10/28/2024	
Requisition total	500.00 USD	
Number of line items	1	



SHOPPER

Request Must be Approved by Manager

- Request status updated within RealSource
- When req is approved, a PO is automatically issued to Candex electronically
- Candex will then send an email to the Payee

VCU

Requisition • 4149204 Assign To Myself

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Department Approval	Ship To	Bill To
Submitted 10/28/2024 11:29 AM	ATTN: Eric Glover 912 W. Grace St. 5th Floor Richmond, VA 23298-0327 United States	Accounts Payable 912 W. Grace St., 5th Floor Box 980327 Richmond, VA 23298 United States
Cart Name test		Billing Options
Description no value		Accounting Date no value
Prepared By Eric Glover		
Prepared Eric Glover		

Summary

What's next?

Workflow

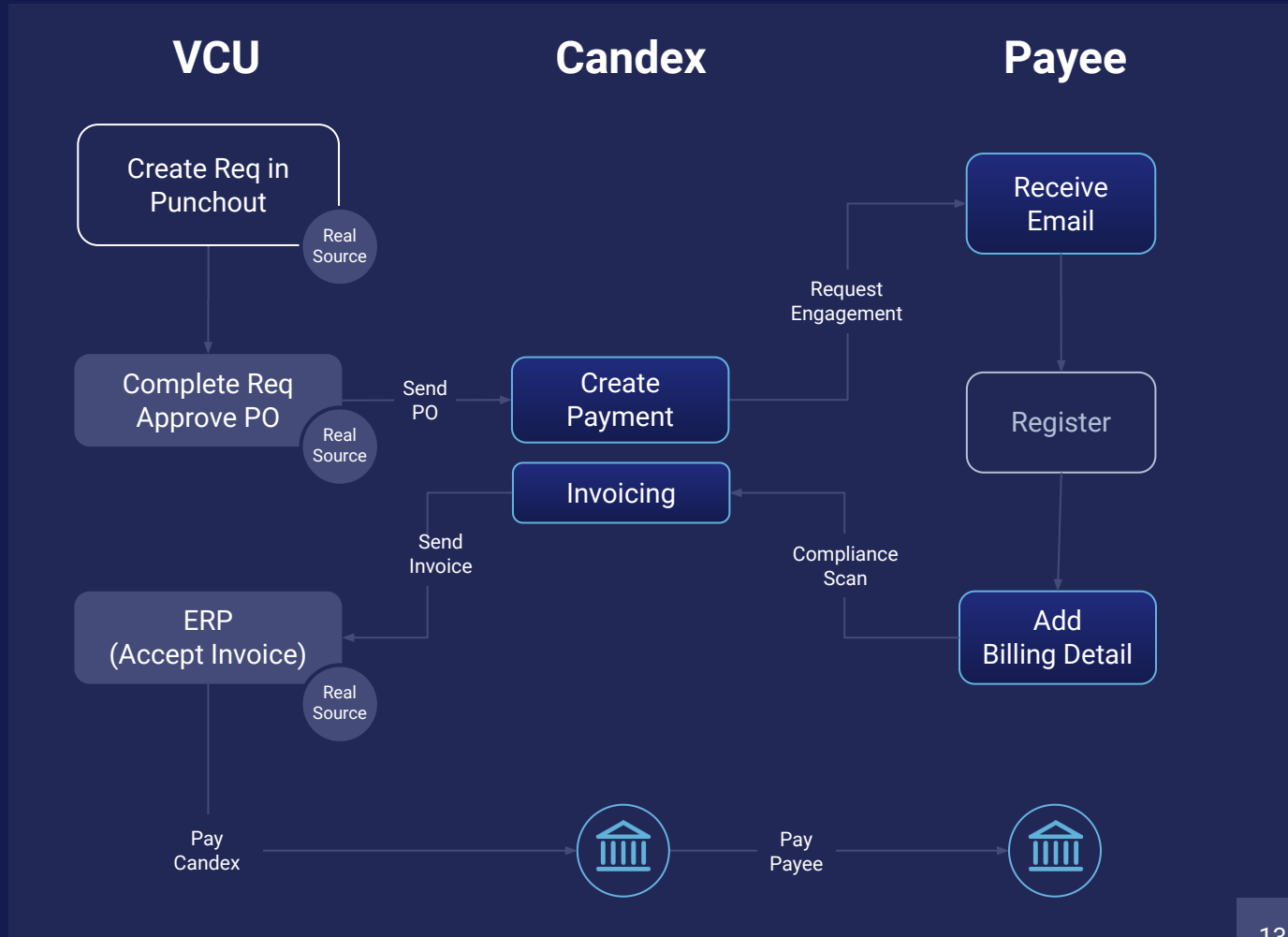
Show skipped steps

Submitted
10/28/2024 11:29 AM
Submitted · 10/28/2024 11:29 AM · Eric Glover

Department Approval
Pending · Unassigned

Candex Payment Flow

1. Initiate the req as a punchout catalog, then complete the req and submit for approval (scope, quote, cost center)
2. A PO is released to Candex once approved and the Payee is invited by email to Candex
3. Payee clicks "Get Paid" link in email invitation, registers (if 1st), accepts order terms, adds billing and bank details.
4. Candex runs sanctions and AML screens, then invoices VCU. Buyer receives invoice on that PO and follows standard acceptance procedures
5. VCU pays Candex under setup terms for that country, and Candex pays Payee as soon as the money has cleared





Payee Experience



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 Industries 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

Email

Language

This payment is to my company

This payment is to me personally

First Name

Last Name

Company

Phone Number

Job Title

Create Password

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

A. If Payee is being paid as part of company

B. If Payee is being paid as an individual

Not shown if Payee selects 'B'



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

Item

Designate the "Pay To" and upload in

Submit

Skip for Now

Deliver To:

VCU
United States

Add Detail



Personal Details

Name

Country

Address

City

Zip Code

Tax Classification



Bank Details

Bank Name

Bank Country

Currency

Account Holder

Account #

ACH Routing#

Upload File

+ Add intermediary bank

Add



PAYEE

Request Payment

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

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

Tax ID #: 45-2805653

Deliver To:

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

Item (USD)

Speaking Engagement - January

You Get

500

500

Tax

0

view/edit

Total Amount 500

Tax -

Due to You 500

Submit

Skip for Now



PAYEE

Withholding

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

Miller & Sons

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

ORDERS

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

Request Payment

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's payment.

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

search

Sign out

Invite Finance

Tax

Speaking Engagement - January

Deliver-to VCU
United States

Amount 500 USD

Tax USD

Withholding 150 USD

-Select-

0%

1%

2%

3%

4%

5%

7%

8%

9%

10%

15%

20%

25%

30%

Save

view/edit

Zack Miller

Online

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

VCU

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

Bill to:
Candex Solutions, Inc.

Pay to:
Miller & Sons, LLC

Ship to:
Virginia, United States



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: Miller & 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 & Sons, LLC

Account #: 9382930291

ACH Routing #: AAAA-BB-CC-123

[+ 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

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.

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

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

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:
 [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	<input type="text" value="3,500"/> <small>up to 3,500</small>
Tax	- view/edit
Total Amount	3,500
Tax	-
Due to You)	3,500

[Submit](#) [Skip for Now](#)

candex.com

Operational Details

Candex Support

Candex provides frontline support. You or your Payee can email support@candex.com at any time



PO Changes

Cancel PO using the Cancel PO request form located in RealSource



Early payment options

If you need early payment, reach out to AP



Many Languages

Czech, Dutch, English, French, German, Hebrew, Italian, Portuguese (Brazil), Polish, Spanish, Chinese Simplified & Traditional, Japanese.

Successful Payee Adoption

Resources:

[!\[\]\(34b4f260a8587d2e97eeaee361cc357b_img.jpg\) Payee Guide](#)

[!\[\]\(3d8c13c92b853674f749aac6fa869926_img.jpg\) Payee Email](#)



Does the Payee know you will use Candex?

Does Payee know the 3 day payment terms?

Questions?

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