

RECEIVING PAYMENTS THROUGH CANDEX

TEXAS TECH UNIVERSITY

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FROM HERE, IT'S POSSIBLE.™

From: Texas Tech (via Candex)
Subject: Action Required: Accept Payment

Research Participation - Study

Lubbock, Texas | PO#: P1130407

From

Texas Tech University



Request Payment

1

To: john.smith@outlook.com

A payment of 40.00 USD is authorized to you.

Items:

- Research Participation - Study

[Click here](#) to get paid.

Texas Tech 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



RECEIVE AN E-MAIL FROM CANDEX

1. Receive an Email:

Payees will receive an e-mail from Candex to collect their payment.

2. Email Reminders:

Reminder emails will be sent regularly to the payee every: 1, 2, 4, 7, 10, 14, 17, 21, and 28 days until the payment is accepted

* It is not uncommon for the e-mail to be sent to spam/junk mail, so please be sure to check these folders in your e-mail mailbox.



CANDEX

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

Candex makes it easy to pay and get paid

Email

john.smith@outlook.com

Language

English

☐ This is a company account
 ☒ This is an individual account

First Name

John

Last Name

Smith

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

Must be Checked

CANDEX ACCOUNT CREATION

1. Create an Account:

If you have received an e-mail from Candex, you will be required to create an account to provide your entity and banking information.

Account creation is required only for the first-time payment. All other future payments through Candex will not require an account setup until a dollar threshold is reached.

The Candex account will allow payees to update their entity and banking information and track the status of their payments.

* Phone Number must be 10 Digits (no dashes)

FROM HERE, IT'S POSSIBLE.™

3



John Smith Request Payment search Sign Out

Research Participation - Study PO#: P1130405 | Texas Tech University [Invite Finance](#) [View Terms](#)

After you request payment and Candex verifies your banking information, Candex will invoice Texas Tech University (TTU). Payment terms are 5 days from the date Candex invoices TTU and Candex will pay you within 3 business days of receiving payment from TTU.

Candex will pay you within 3 business days of receiving payment from Buyer.

Pay to [Add Details](#)

Bill to:
Candex Solutions, Inc.
420 Lexington Ave, Ste 300
New York, NY 10170, US
TAX #: 45-2805653

Deliver to:
John Smith
101 Main Street.
Lubbock, 79409
TX,US

Item
Designate the "Pay to" and complete process.

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

John Smith
Online

PAY TO DETAILS: ENTITY & BILLING INFO

1. **Entity and Billing Information:**
Once a Candex account has been created and the payee logs in, they will be brought to a homepage where they can locate their pending payments.

Payees must select a **“Pay to”** destination to route the funds to their respective bank.

**First-time payees will be prompted to add their entity and banking information. This is a secured site.*

To add these details, the payee must select the payment under the **“Orders”** section on the left navigation bar.





ENTITY & BILLING INFORMATION

- 1. **Entity Information:**
Recipients must enter their Name, Country, Address, Tax Classification, and W9 tax form. A W9 Tax form can be downloaded by selecting “download” next to the W9 field. Uploading the W9 tax form is a requirement.
- 2. **Banking Information:**
Recipients must provide the banking institution where they would like the payment deposited. The Bank Name, Country, Currency, Account Holder, Account Number, and ACH Routing information must be provided.

Intermediary banking details can be provided if you intend to use a foreign national bank to deposit the funds.



John Smith

My Activity

My Requests

Order Feed

Settings

ORDERS

Research Participation - St

John Smith Online

Request Payment

Research Participation - Study

After you request payment and Candex verifies your banking information, Candex will invoice Texas Tech University (TTU). Payment terms are 5 days from the date Candex invoices TTU and Candex will pay you within 3 business days of receiving payment from TTU.

Pay To: Add Detail

Bill To: Candex Solutions, Inc

Deliver To: Texas Tech

Item

Designate the "Pay To" and upload

Submit

Skip for Now

Entity

Bank Details

Upload File

Add



John Smith

1

My Activity

My Requests

Order Feed

Settings

ORDERS

Research Participation - St1

John Smith
Online

Request Payment

search

Sign out

Research Participation - Study

PO# P1130407

Invite Finance

After you request payment and Candex verifies your banking information, Candex will invoice Buyer. Payment terms are 5 days from the date Candex invoices Buyer and Candex will pay you within 3 business days of receiving payment from Buyer.

Pay To: (US / USD) John Smith

Account: Citibank: *****291

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

Deliver To: Texas Tech
United States

Item (USD)	You Get	Tax
Research Participation - Study	40	0

Total Amount 40

Tax -

Due to You 40

Submit

Skip for Now

REQUEST YOUR PAYMENT

- 1. Pay To:** After entering your entity and banking information, payees must select their name under the “Pay To” field.
- 2.** Payees can see the amount that will be paid to them just above the “**Submit**” button.
- 3.** Questions regarding the payment amount should be deferred to the individual responsible for your payment.
- 4.** Select “**Submit**” to request your payment.

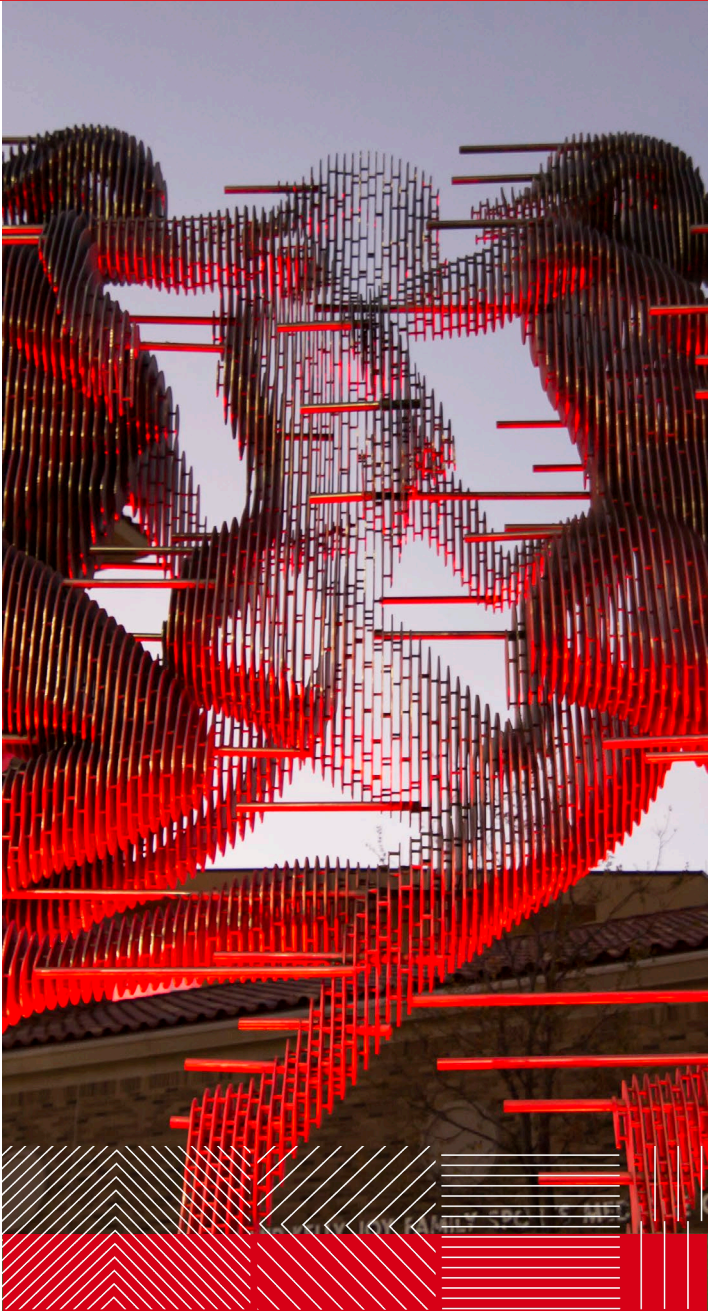




WHAT'S NEXT?



On the next page, see how you can check the status of your payment.



CHECKING THE PAYMENT STATUS





John Smith

1

My Activity

My Requests

Order Feed

Settings

ORDERS 2

Research Participation - St 1

John Smith Online

Research Participation - PO# P1130407

By: Jul 1 | To: TX 1 40.00

July 1, 2024

Created by John Smith
A reminder to accept terms was sent to john.smith@outlook.com

July 5, 2024

July 9, 2024

write something...

Payment Details 3

Seller Verified Candex Invoice Paid by Buyer Paid to Seller

Recipient John Smith By John Smith 4

Payer Texas Tech Candex Invoice Invoiced 5

Amount USD 40.00
Tax -
Total Amount 40.00
Candex ID 995479
PO # P1130407
Payment Request Jul 1
Last Update Jul 9
Invoice Date Jul 5
Payment Terms 15 days
TTU Paid Candex Jul 5
Candex Paid You Jul 9

Services Research Participation - Study (July 1)
Service USD 40.00

Bill to: Candex Solutions, Inc.
Pay to: John Smith
Ship to: Texas, United States

CHECK YOUR PAYMENT STATUS

1. Checking Payment Status:
Once a payment request has been submitted, payees will immediately receive the payment status screen. Payees can log into their Candex account to check the payment status at any time.

Payees must select the payment in question under “**Orders**” on the left navigation bar to check the “Payment Details,” which has the most up-to-date payment status.

If the Payment Details tab does not appear, simply select the “<” icon in the top right corner and select “Payments” to access the payment details.



UPDATING PROFILE INFORMATION





John Smith

Edit Entity
Dummy User

Personal Details

Name: John Smith

Country: United States

Address: 101 Main St.

City: Lubbock

Zip Code: 79409

SSN/TIN #: US 987654321 TX

Tax Classification: Individual / Sole Proprietor

Bank Details

Bank Country: United States

Account Currency: USD

Bank Name: Citibank

Account Holder Name: John Smith

Account #: 12345678291

ACH Routing #: 963852741

+ add intermediary bank

Receiving Funds

Bank Verification
Use bank statement or voided check

Bank Verification
Upload File

Sign Out

Back

edit

Save

Settings

Entities

John Smith
Online

UPDATE YOUR PROFILE

1. Update Your Profile:

Payees needing to update their entity or banking Information may go to the “Settings” option in the navigation bar on the left.

Once “Settings” is selected, additional options are listed for the payee to choose from. However, they must select the “**Entities**” option if they wish to update their entity and banking details.

REQUESTING A CHECK





REQUESTING A CHECK

TTU recommends payment via ACH transfer as it is the quickest and most efficient approach. However, if you would still like to be paid by check, you will need to contact the Candex Customer Support team (support@candex.com).

A Candex account will still need to be created, and payees will be required to provide their entity information. Candex performs compliance/AML/Sanction Screening, etc. before a check can be issued.

Candex Support will require the following information as well from the payee.

Bank Name: Paper Check

Beneficiary Name: XXXXXXXX

Account #: 000000

ACH Routing #: 000000000



QUESTIONS/ SUPPORT





QUESTIONS/SUPPORT

Candex Technical Support:

- 1. support@candex.com

Payment Questions:

- 1. Individual responsible for your payment (first.last@ttu.edu)
- 2. [Payment Strategies@ttu.edu](mailto:PaymentStrategies@ttu.edu)

