



# PaymentWorks Supplier Reference

## *Updating Your Company Profile*

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# Company Profile Overview

## What is a Company Profile?

Your PaymentWorks Company Profile is where you create and manage the business information you need to share with your customer. When you update your profile – for example, when you change your business address – all customers with which you are connected on PaymentWorks will receive your update.

When you connect with a customer through an invitation that they have sent you, a PaymentWorks Company Profile will automatically be created. If you did not register through a customer's invitation, you may need to create a company profile manually. In this case, you will see a button displayed labeled Create Company Profile. Clicking that button will walk you through the simple process.

As a supplier, after you have created a company profile, you can edit that information under the Company Profile link in the upper right part of the screen, as highlighted in the screenshot below.

The screenshot displays the PaymentWorks user interface. At the top, the PaymentWorks logo is on the left, and the user's name 'John Smith, Coffee Supplier' is on the right. A red circle highlights the 'Company Profile' link in the top navigation bar. Below the navigation bar, there are buttons for 'Home', 'Connect', 'Invoices', 'News Updates', 'Messages', and 'Remittances'. The main content area shows a greeting 'Hello John Smith' and a message 'You have no unread messages'. Below this, there is a table header 'Invoice/Paid Amount | # of Invoices' and a dropdown menu set to 'last 30 days'. The table has five columns: 'Accepted', 'Exception', 'Rejected', 'Approved', and 'Paid'. The 'Accepted' column shows a bar chart with a value of 0. On the right side of the main content area, there is a blue sidebar with the PaymentWorks logo. At the bottom of the page, there is a footer with the text '© 2014 - 2017 PaymentWorks, Inc.' and links for 'Privacy Policy', 'Terms & Conditions', 'Help', and 'Contact'.

# 1. Changing Your Company (DBA) Name

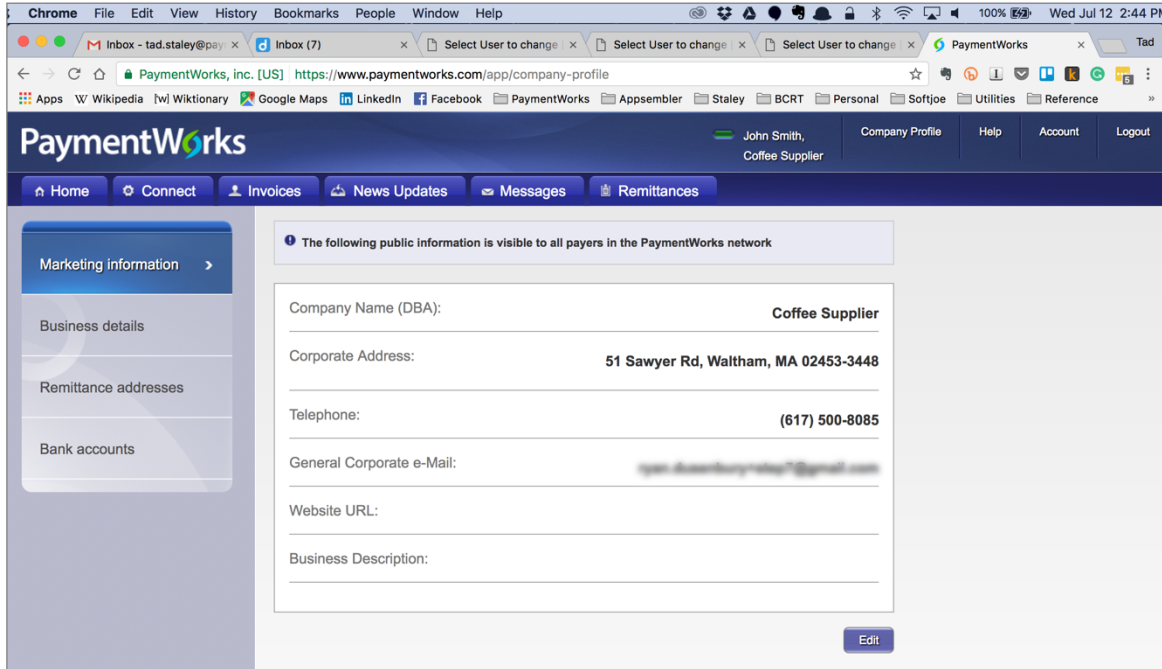
PaymentWorks provides separate fields for the name of each Supplier's business:

- Company name, or DBA ("Doing Business As"), is how the supplier is commonly referred to. The DBA name is what is entered on the second line of a W9 form, if it is different from the legal name.
- Legal name is the name shown on the supplier's income tax return.

You can modify each of these names in the Company Profile section of your PaymentWorks account.

To change your company name, navigate to the Company Profile area, where you will see several subsections listed in the left sidebar.

The first subsection, labeled **Marketing Information**, is where you can change your Company Name.



The screenshot shows a web browser window displaying the PaymentWorks website. The user is logged in as John Smith, a Coffee Supplier. The page is titled "Company Profile" and shows the "Marketing Information" subsection. The form contains the following fields:

|                           |                                      |
|---------------------------|--------------------------------------|
| Company Name (DBA):       | Coffee Supplier                      |
| Corporate Address:        | 51 Sawyer Rd, Waltham, MA 02453-3448 |
| Telephone:                | (617) 500-8085                       |
| General Corporate e-Mail: | john.smith@coffee.com                |
| Website URL:              |                                      |
| Business Description:     |                                      |

An "Edit" button is located at the bottom right of the form. A warning message at the top of the form states: "The following public information is visible to all payers in the PaymentWorks network".

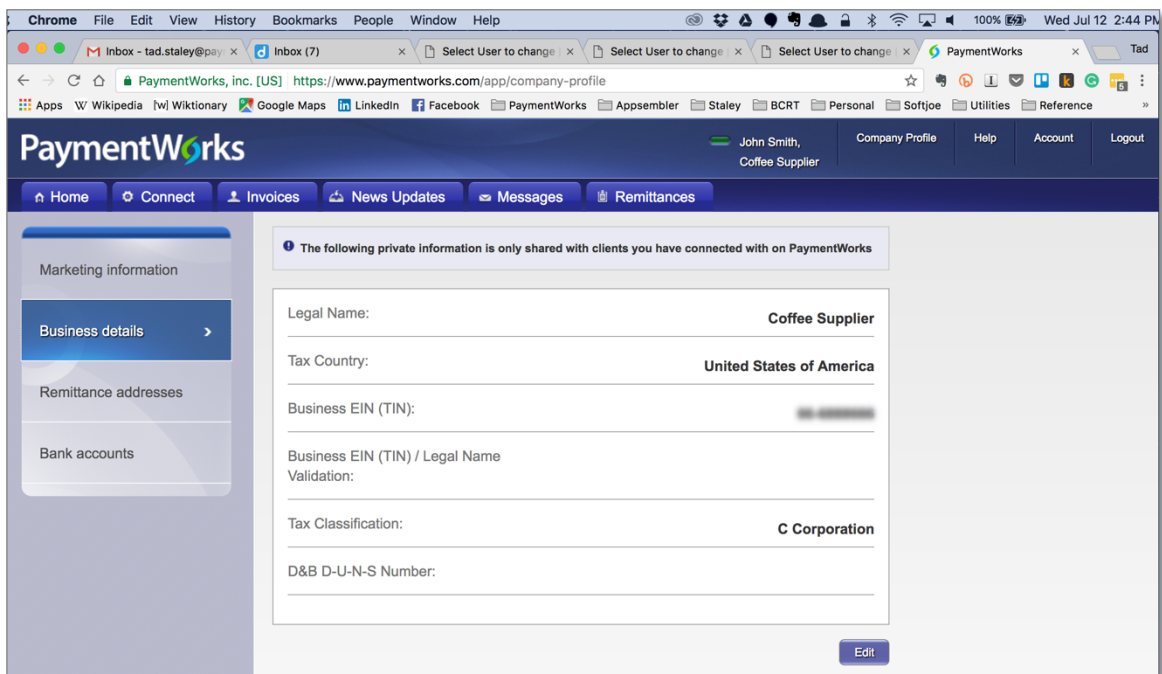
To edit the information displayed in the Marketing subsection, click the Edit button in the lower right part of the screen. When you change any of this

information, customers you are connected to will immediately receive the updated information.

## 2. Changing Your Legal Name

The section below the Marketing Information tab, labeled Business Details, is where you can change your legal business name, as well as other tax-related information such as Tax ID and Tax Classification.

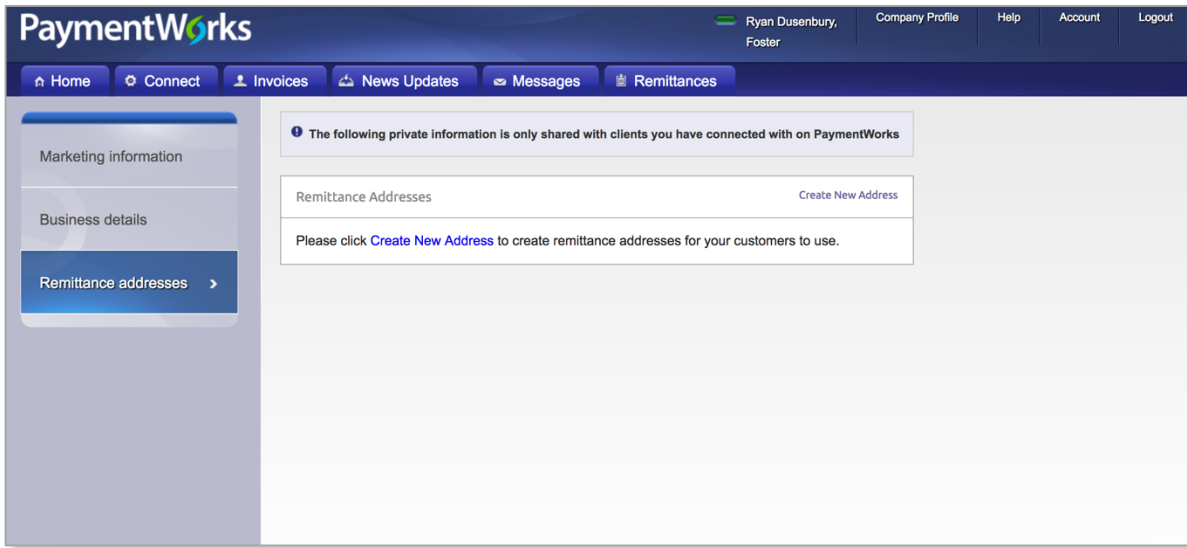
As with Marketing information, your changes will be made immediately available to your customers on PaymentWorks.



## 3. Adding and Editing Your Remittance Addresses

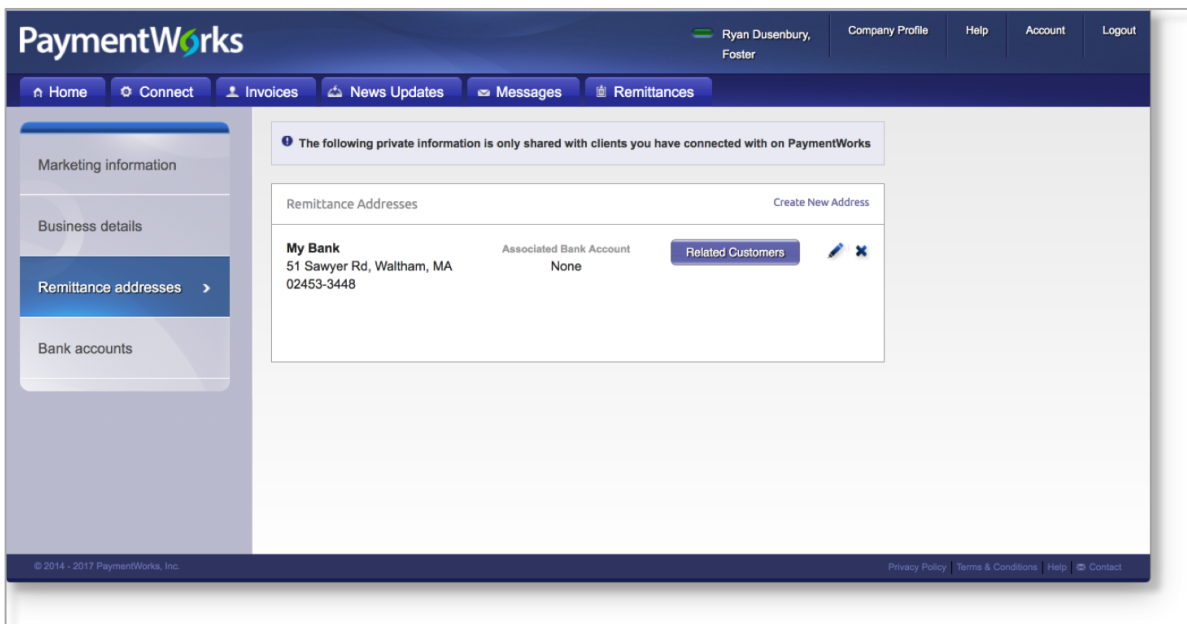
To add bank account information, you must insert a proper remittance address in the remittance address tab. You will not see the Bank Accounts tab until a remittance address is confirmed.

Navigate to the remittance address tab, as shown in the screen shot below. Click "Create New Address" and from there you will be able to fill in a remittance address.

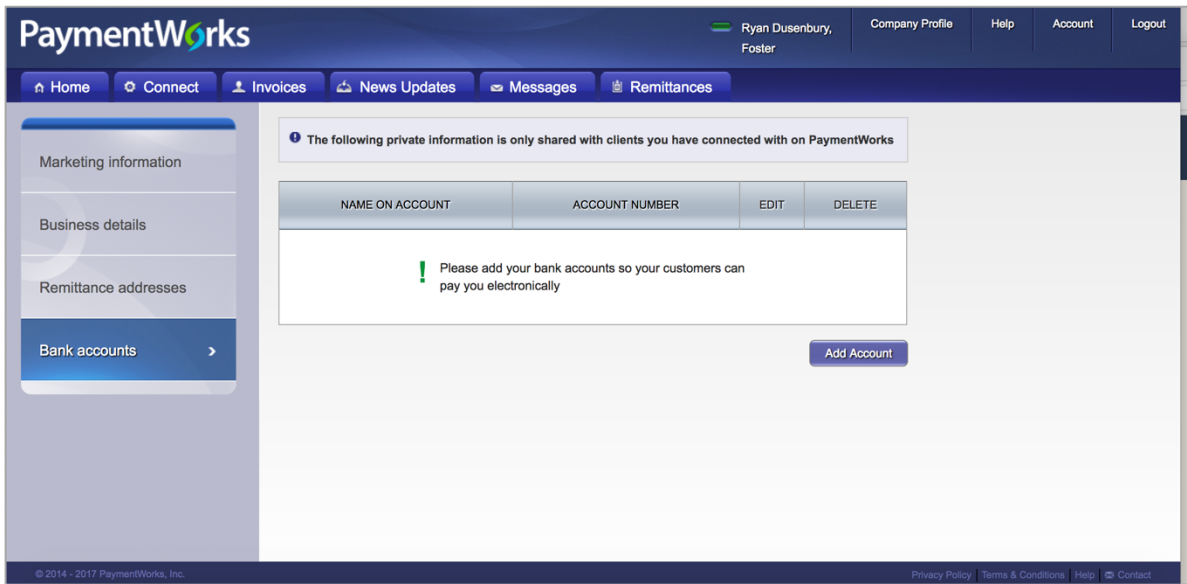


## 4. Adding and Editing Bank Accounts

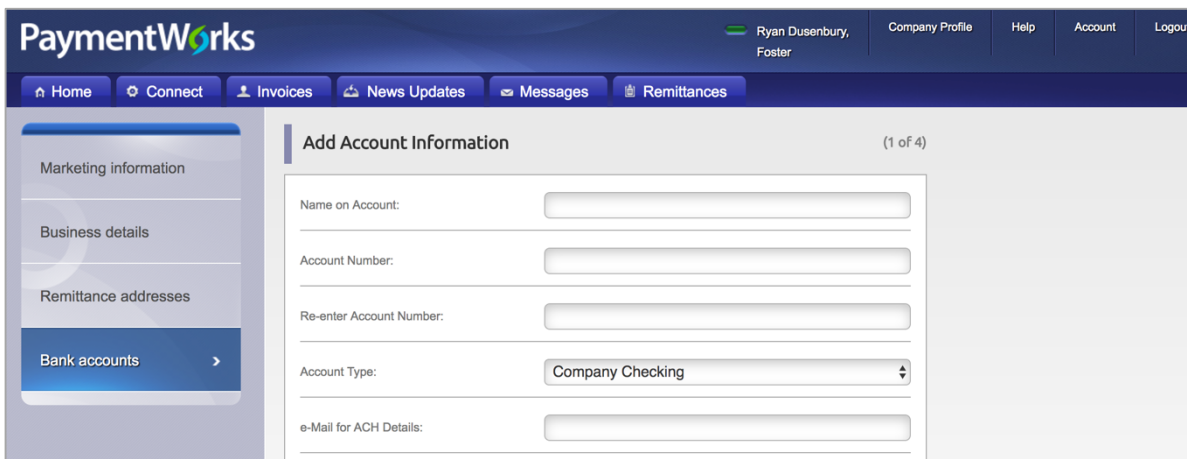
Now, you will see that the bank account tab appears once a remittance address has been filled in, as shown below.



Click on the bank account tab to add a new bank account, and press "Add Account".



Fill in your information, and you will have successfully input your banking information and will be able to receive ACH payments, if applicable.



You can navigate to the Company Profile at any time and change your remittance addresses and bank account information.