PaymentW6rks

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 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.

Paym	entW ø r	ks				John Smith, Coffee Supplier	Company Profile Help	Account	Logout
n Home	Connect	1 Invoices	🗠 News Updates	➡ Messages	Remittances				
Hello Jo	ohn Sm	ith		🗎 You	have no unread me	essages			
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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 you Company Name.

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PaymentW o rks	John Smith, Company Profile Help Account Logout Coffee Supplier									
A Home O Connect 👤 Inv	pices 🖾 News Updates 🛥 Messages 🖹 Remittances									
Marketing information > Business details Remittance addresses Bank accounts	The following public information is visible to all payers in the PaymentWorks network Company Name (DBA): Coffee Supplier Corporate Address: 51 Sawyer Rd, Waltham, MA 02453-3448 Telephone: (617) 500-8085 General Corporate e-Mail: Website URL: Business Description:									
	Edit									

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

Version 2017.1

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.

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PaymentW ø rks	John Smith, Company Profile Help Account Logout Coffee Supplier									
A Home Ø Connect 1	Invoices 🖾 News Updates 🗢 Messages 🔹 Remittances									
Marketing information	The following private information is only shared with clients you have connected with on PaymentWorks									
Business details >	Tax Country:									
Remittance addresses	Business EIN (TIN):									
Bank accounts	Business EIN (TIN) / Legal Name Validation:									
	Tax Classification: C Corporation									
	D&B D-U-N-S Number:									
	Edit									

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.

Paym	entW ø r	ks				Ryan Dusenbury, Foster	Company Profile	Help	Account	Logout
A Home	Connect	1 Invoices	🗠 News Updates	🛥 Messages	Remittances					
Marketing	information	O Th	e following private informa	tion is only shared wi	th clients you have conr	nected with on Payme	ntWorks			
		Rem	ittance Addresses			Create New	Address			
Business of	details	Plea	se click Create New Addr	ress to create remittar	nce addresses for your	customers to use.				
Remittanc	e addresses 🔹									
-	-									

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.

PaymentWorks	Ryan Dusenbury, Foster	Company Profile	Help	Account	Logout			
A Home O Connect 1 Invo	lices 🖾 News Updates	a Messages	Remittances					
Marketing information	The following private informati	on is only shared with	clients you have conne	ected with on Paym	entWorks			
	Remittance Addresses			Create No	ew Address			
Remittance addresses	My Bank 51 Sawyer Rd, Waltham, MA 02453-3448	Associated Bank None	Account	ed Customers	/ ×			
Bank accounts								
								- 1
@ 2014 - 2017 PaymentWorks, Inc.					Privacy Peti	ý. Terma & Co	ndóine Help d	Contact

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

Payme	entWør	ks	Ryan Dusen Foster	bury, Company Pr	ofile Help	Account	Logout			
n Home	Connect	1 Invoices	🗠 News Updates		Remittances					
Marketing	information	0 Th	e following private informa	tion is only shared wi	th clients you have conne	ected with on	PaymentWorks			
Business c	letails		NAME ON ACCOUNT	ACC	COUNT NUMBER	EDIT	DELETE			
Remittance	e addresses		Pleas pay ye	e add your bank acco ou electronically	unts so your customers ca	an				
Bank acco	unts >						Add Account			
© 2014 - 2017 Pa	symentWorks, Inc.						Priva	cy Policy Terms & C	onditions Help @	Contact

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

PaymentW	KS Ryan Dusenbu Foster	ury, Company Profile Help Account Logout
A Home O Connect	1 Invoices 🖆 News Updates 🛥 Messages 📓 Remittances	
Marketing information	Add Account Information	(1 oF 4)
Business details	Name on Account:	
	Account Number:	
Remittance addresses	Re-enter Account Number:	
Bank accounts :	Account Type: Company Checking	•
	e-Mail for ACH Details:	

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