



# PaymentWorks Supplier Reference

## *Updating Your Company Profile*

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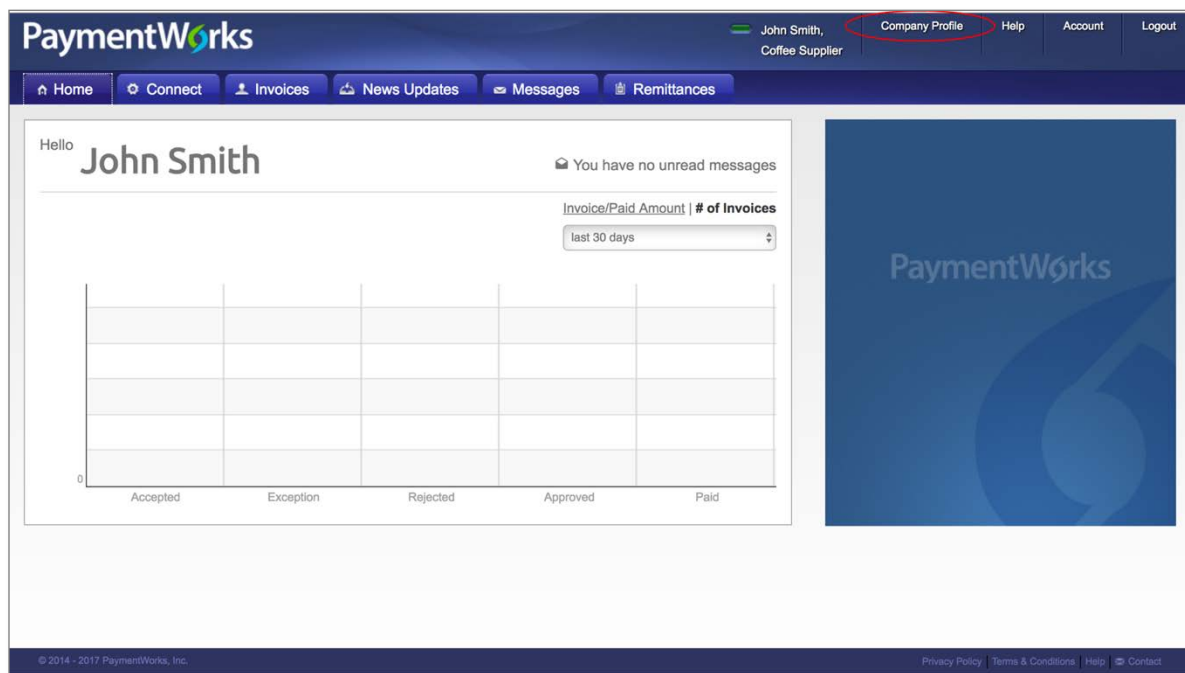
# Company Profile Overview

## *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.



# 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 with the PaymentWorks application. The address bar shows the URL: <https://www.paymentworks.com/app/company-profile>. The page has a dark blue header with the PaymentWorks logo and user information: John Smith, Coffee Supplier. Below the header is a navigation bar with links: Home, Connect, Invoices, News Updates, Messages, and Remittances. On the left is a sidebar with a 'Marketing information' section highlighted, and other options: Business details, Remittance addresses, and Bank accounts. The main content area displays a form for 'Marketing information' with the following fields and values:

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:	john.smith@coffee.com
Website URL:	
Business Description:	

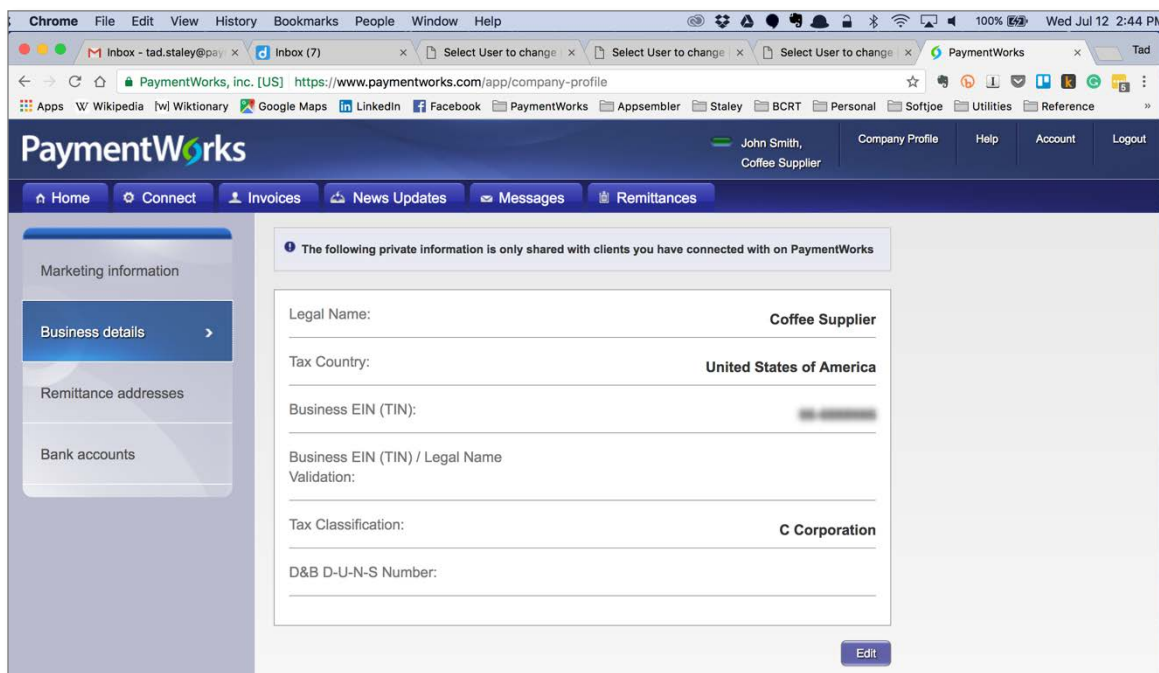
An 'Edit' button is located at the bottom right of the form.

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.

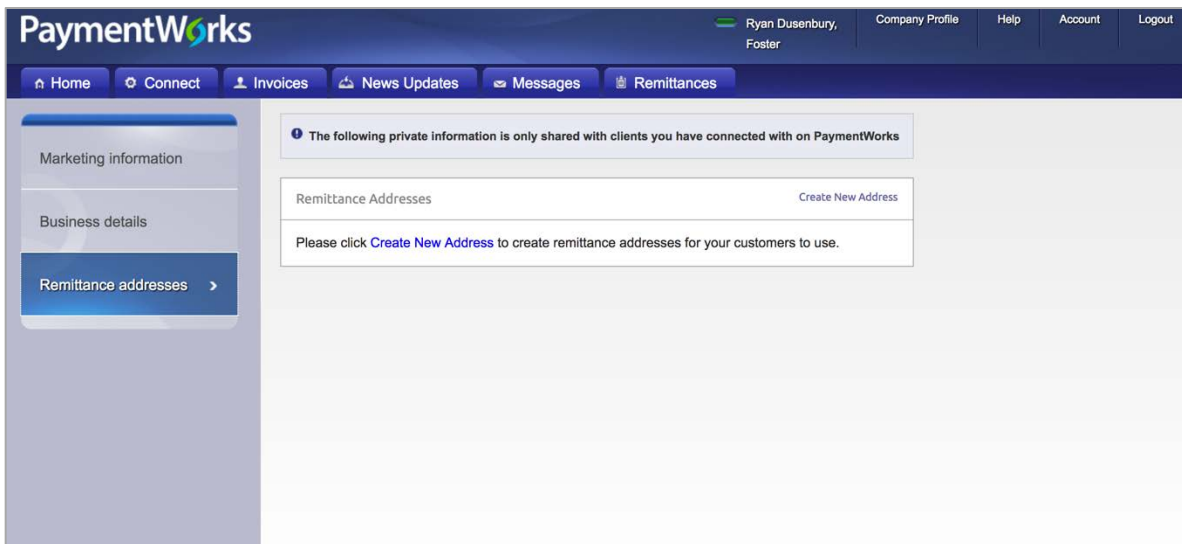


The screenshot shows a web browser window with the PaymentWorks application. The browser's address bar displays the URL <https://www.paymentworks.com/app/company-profile>. The application's header includes the PaymentWorks logo, a user profile for John Smith (Coffee Supplier), and navigation links for Company Profile, Help, Account, and Logout. A secondary navigation bar contains links for Home, Connect, Invoices, News Updates, Messages, and Remittances. On the left, a sidebar menu lists Marketing information, Business details (which is highlighted with a right-pointing arrow), Remittance addresses, and Bank accounts. The main content area features a warning message: "The following private information is only shared with clients you have connected with on PaymentWorks". Below this is a form with the following fields and values: Legal Name (Coffee Supplier), Tax Country (United States of America), Business EIN (TIN) (a blurred field), Business EIN (TIN) / Legal Name Validation (a blurred field), Tax Classification (C Corporation), and D&B D-U-N-S Number (a blurred field). An "Edit" button is located at the bottom right of the form.

### 3. Adding and Editing Your Remittance Addresses

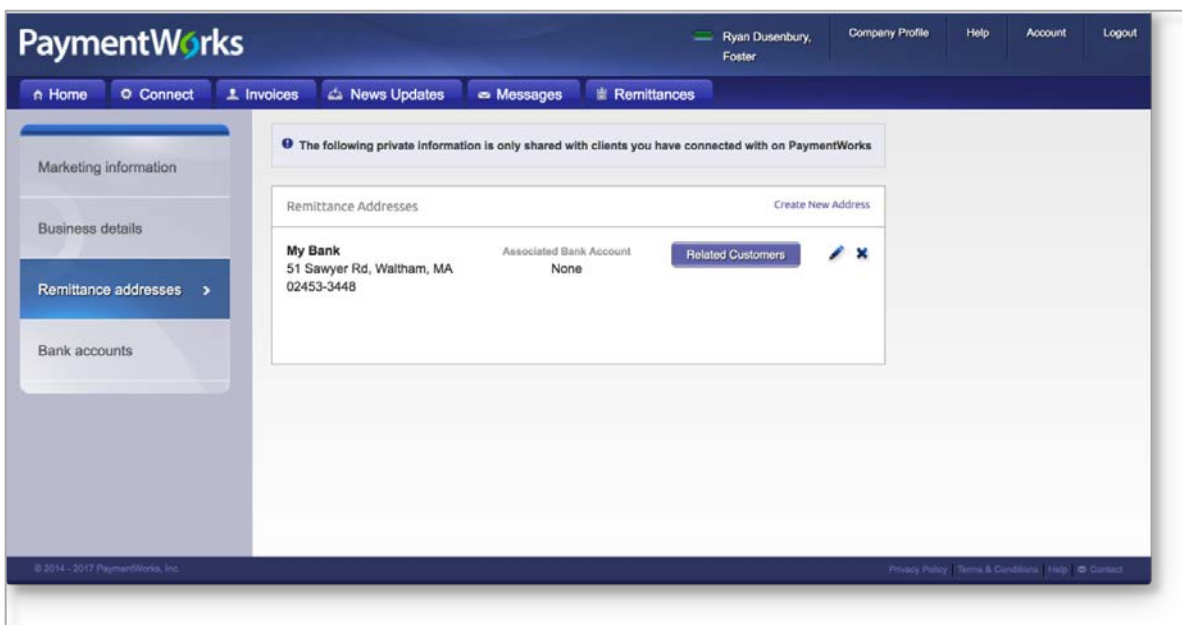
To add bank account information, you must insert a proper remittance address in the remittance address tab. You will not see the Bank Accounts tab until a remittance address is confirmed.

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.

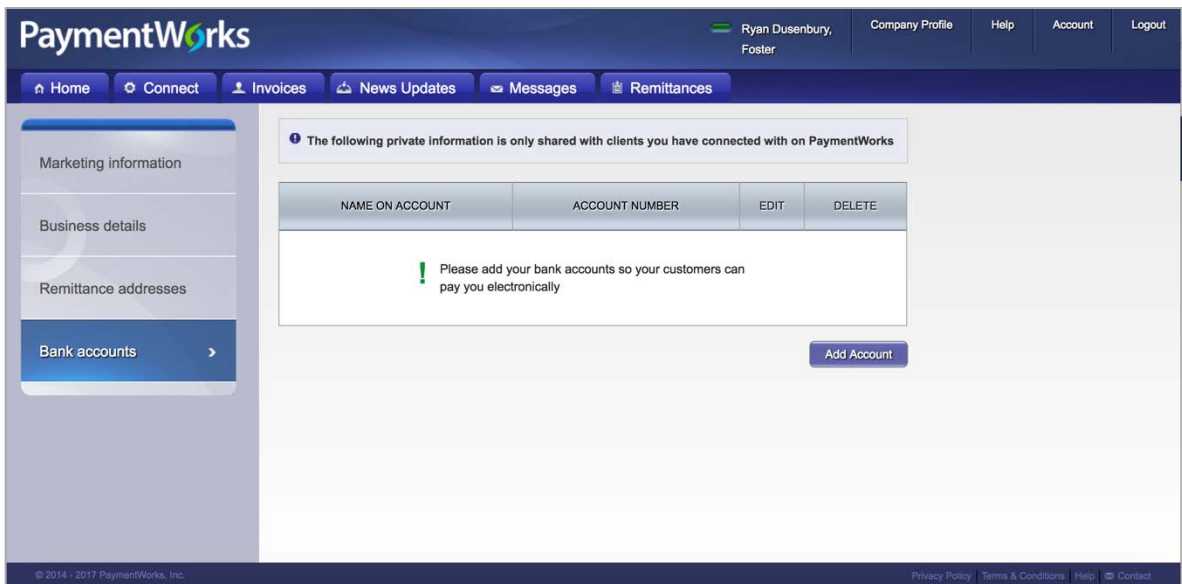


## 4. Adding and Editing Bank Accounts

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.