



WaveWorks!

Candex User Guide

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Candex

Candex is Tulane's new punchout to process for student, speaker and guest reimbursements. This is **not** for vendors, faculty, or staff payments or reimbursements.

Staff and Faculty who are also students should submit reimbursement requests through the expense module.

Who can be paid with Candex?

Alumni- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Guest Artists- examples are musicians, dancers, or actors. Any guest artist who signs a contract is a vendor and should be set up as a supplier and paid through the non-catalog requisition/PO process.

Guests- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Honorariums- remember that Tulane employees are not eligible for honorariums. Please use the Honorarium Engagement Agreement.

One Time NSR Stipends- these are for non-Tulane students or one time NSR payments to Tulane students. Tulane students receiving multiple payments in a semester should follow the process through Financial Aid and Student Accounts.

Participant Support- This is for support given to study participants- examples could be paying a participant's Entergy bill or transportation to the study.

Speakers- like guest artists. If speaker signs a contract, they should be set up as a supplier and paid through the non-catalog requisition/PO process.

Students- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses, academic prizes and awards (including travel or summer grants), and reimbursement for books, publications, subscriptions or supplies/operating expenses.

Study Participants- payment directly to the participant for participation in the study.

Trainees- misc. expenses, stipends or travel

What is the process to use Candex?

- 1. Notify the payee that they will be paid through Candex (see stock letter).
- 2. Set up the payment through the punchout located in Procurement.
- 3. Allocate and submit the requisition.
- 4. Once all approvals are obtained, the requisition will become a PO.
- 5. The PO is sent to Candex.
- 6. Candex will reach out to the payee.
- 7. The payee will create an account with Candex and add their billing details (Tulane employees no longer need to obtain contact information nor W9 forms for these payments).
- 8. Candex will invoice Tulane.
- 9. Tulane will pay Candex.
- 10. Candex will pay the payee.

*****TIP***** Do not process more than 3 recipients on one requisition/cart to streamline approval. Delayed approvals may take up to 14 business days.

How to process a payment

From WaveWorks go to the Procurement tab.	Procurement
Click on	 Purchase Requisitions (RSSP)
Click on Candex.	CANDEX 
Choose a Category.	Category Student Reimbursements Supplies/O... x

Enter a Description.	Description The description should include the payee name, email address, and student status (faculty and staff who are also students should not be reimbursed here)
Enter the payee email.	Payee Email Email a person, not a general mailbox A Tulane email is acceptable for students
Enter the payment amount.	Amount Payee Gets USD
Enter an Event Date, if applicable.	Event Date MM-DD-YY
Choose the Status.	Citizen/ Permanent Resident Select or type...
Check any applicable boxes and make sure to follow those directions.	☐ Travel/event agenda, reimbursement form, and receipts must be attached to the requisition in WaveWorks. ☐ Receipt showing proof of payment must be attached to requisition in WaveWorks. ☐ I have added the name of the Payee in the description above. These attestations may change depending on category Attachments are done in WaveWorks not here in Candex
Add Additional Line Items.	Checkout Add Line-Item Each expense category requires a line (example the total travel reimbursement can be one amount in that category) Do not break out by individual expense i.e. do not add each meal or uber
Checkout.	Checkout Add Line-Item

Click on the pencil next to the Requisition Summary

Requisition summary



Enter a brief description.

Description

Category descriptions- reimbursement, honorarium, award, or one-time payment

Add a Justification if applicable.

Justification

These comments are just for Tulane approvers

Update the Deliver-to-Location if needed.

Delivery

Requested Delivery Date
04/17/2026



Deliver-to Location
Poydras Street Bldg



This field needs to match the delivery address in the Additional Information

Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.

Project costing

Project Number



Charge account

Charge To
364900.410.75402.610.00000.0000.ER420089.00



Only use the Charge Account if the account starts with GL

If using a Sponsored Project, make sure to add the RASU details on the line item

See the How to Check Out section of the guide for more information

Budgetary control should be today's date.

Budgetary control

Budget Date
04/02/2026



This is the date that will appear on the budget statement

Add the recipient.

Attention to (Recipient of Package or Service)

Required

This is the Tulane employee completing the requisition

****TIP**** Search is last name, first name

Add the recipient's delivery building.

Deliver-To Building Name

Required

This is the building for the Tulane employee completing the requisition

This needs to match the building in the Delivery section

Add the recipient's room number.

Room Number

Required

This is the room number for the Tulane employee completing the requisition

****TIP**** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here

****TIP**** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here

Add a note to Supplier if applicable.

Note to Supplier

Add all attachments for the requisition here as one PDF.

Attachments

Category
Internal to Requisition

Drag and Drop

Select or drop files here.

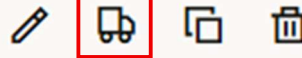
URL

Click Update.

Cancel

Update

Update any line items.



This is where split allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable

Click Submit.

...

Submit

The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

What does the process look like for the payee?

The payee receives an email from Candex.

To: Seller
From: Tulane University (Via Candex)
Subject: Action Required: Accept Payment PO#: CTPO1239045

Speaking Engagement - April
California, United States | PO# CTPO1239045



Deliver to
Tulane University

Request Payment

Zack,

A payment of 500 USD is authorized to you.

Items:

Speaking Engagement - April

[Click Here](#) to get paid.

Candex allows businesses to engage and exchange payments in a compliant way without setup in each other's financial systems.

View [FAQs](#)

Support at support@candex.com

CANDEX®

The payee registers with Candex.

**Candex makes it easy to
pay and get paid**

Email	Language		
zack@miller.com	English		
☐ This payment is to my company			
☒ This payment is to me personally			
First Name	Last Name	Phone	Select
			Select
Password		Confirm Password	
☐ I agree to the Candex Terms Of Use and Privacy Policy			

Register Now

The payee begins the payment request by adding "Pay To" Details.

Miller & Sons

My Activity
My Requests
Order Feed
Settings

ORDERS
Speaking Engagement ...

New Closed

Request Payment

Tulane University | PDF CTP01239045

After you request payment and Candes verifies your banking information, Candes will invoice Buyer. The funds should reach your account within 7 business days of Buyer's acceptance of Candes's invoice.

Pay To

Add

Tax Invoice Address:
Candes Solutions, Inc.
420 Lexington Avenue, Suite 300,
New York, NY 10170, US
Tax ID #: 45-2805653

Deliver to:
Tulane University
456 Elm St.
California, United States

1) Add or choose the "Pay to"
2) Add or verify transaction documentation
3) Add and submit details for your payment

Zack Miller
Online

The payee adds their payment details.

Miller & Sons

My Activity
My Requests
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ORDERS
Speaking Engagement ...

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Request Payment

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After you request payment and Candes verifies your banking information, Candes will invoice Buyer. The funds should reach your account within 7 business days of Buyer's acceptance of Candes's invoice.

Pay To

Add

Tax Invoice Address:
Candes Solutions, Inc.
420 Lexington Avenue, Suite 300,
New York, NY 10170, US
Tax ID #: 45-2805653

Deliver to:
Tulane University
456 Elm St.
California, United States

1) Add or choose the "Pay to"
2) Add or verify transaction documentation
3) Add and submit details for your payment

Zack Miller
Online

The payee completes the payment request.

Miller & Sons

My Activity
My Requests
Order Feed
Settings

ORDERS
Speaking Engagement ...

New Closed

Request Payment

Tulane University | PDF CTP01239045

After you request payment and Candes verifies your banking information, Candes will invoice Buyer. The funds should reach your account within 7 business days of Buyer's acceptance of Candes's invoice.

Pay To

Miller & Sons, LLC (US-1000) X edit Citibank *****(291)

Tax Invoice Address:
Candes Solutions, Inc.
420 Lexington Avenue, Suite 300,
New York, NY 10170, US
Tax ID #: 45-2805653

Deliver to:
Tulane University
456 Elm St.
California, United States

Item (USD) Amount Tax

Speaking Engagement - April 500 - view / edit

Amount 500 USD

Tax -

Total Invoice 500

Withholding (150)

Net Due 350

☐ I understand that my buyer will need to agree to pay me personally

Get Paid Skip for now

Zack Miller
Online

The payee completes the tax withholding screen.

The screenshot shows the 'Miller & Sons' interface for a 'Speaking Engagement - April' at Tulane University. The 'Pay To' section lists Miller & Sons, LLC as the payee and Citibank as the payment method. The 'Tax Invoice Address' and 'Deliver to' addresses are provided. A table shows the invoice details: Item (USD), Amount (500), and Tax (0). The total invoice is 500, with a withholding of 150, resulting in a net due of 350. The 'Withholdings' section explains that 30% withholding is required by law and offers options to accept, claim a reduction, claim physical delivery outside US, or claim an expense reimbursement. The user, Zack Miller, is logged in.

International Students should select Passive Income

To receive the 14% tax rate they will need to provide proof of F-1/J-1 status (DS-2019 or I-94)

For Tax Treaty Benefits (0% or reduced) a completed W-8BEN (including the treaty claim) and a valid US Taxpayer ID (SSN or ITIN) needs to be provided

The payee receives requisition status updates.

The screenshot shows the 'Miller & Sons' interface for a 'Speaking Engagement - April' at Tulane University. The 'Payment Details' section shows a timeline of events: 'Terms accepted by Zack Miller of Miller & Sons' (April 3, 2025), 'Invoice uploaded by Zack Miller' (April 3, 2025), 'Candex invoiced Tulane University' (April 5, 2025), and 'Miller & Sons was paid' (April 11, 2025). The 'Amount' is 500 USD, and the 'Tax' is 0. The 'Payment Details' section also shows the 'Tax Invoice Address' and 'Deliver to' addresses. The user, Zack Miller, is logged in.

Payee can update their bank details at any time.

Miller & Sons

My Activity

My Requests

Order Feed

Settings

PERSONAL SETTINGS

Personal Bank

Preferences

Profile

COMPANY SETTINGS

Setup

Users & Teams

Entities

PURCHASING SETTINGS

Category Tree

View Closed

Zack Miller

Online

Miller & Sons

Search

Sign Out

Entity Details

Upload File

Entity Name

Country

United States

Address

City

Zip Code

Optional

Tax ID #

US

Tax Classification

Select

Beneficial Owners

Do you have any Beneficial Owners?

Yes

No

A Beneficial Owner is any individual or entity that owns, directly or indirectly, 25% or more of your company.

Receiving Funds

Bank Details

Bank Verification

Validate Bank Details

Upload

Payees provide either a recent bank statement or voided checks to verify their bank information. Upload a copy of a bank document showing the bank name, your name, and account number associated with the account.

Bank Country

United States

Account Currency

USD

Bank Name

Account Holder Name

Account #

ACH Routing #

SWIFT/BIC

Does your bank require an intermediary bank to receive this payment?

Yes

No

466

Save for later

Draft Email for Payees

Dear _____,

We are submitting payment for you through Candex to ensure that you are paid as quickly as possible. You will receive an email from Candex to set up and complete the payment request through the Candex platform. Please note that all payment and other order terms are determined by Tulane University.

Benefits of working with Candex:

- **Fast & Simple** – only 1 minute registration and if you already have a Candex account you can just log in to complete the transaction
- **Easy & Innovative** - User-friendly portal with real-time updates and transparent payment schedule
- **Secure** - your data is protected with industry-standard security measures and encryption protocols
- **Candex has you covered** - a designated support team available to help answer your questions

How does it work:

- You will receive an email from Candex informing you that you have a payment authorization from Tulane University on the Candex platform, with a link to request your payment
- You register, accept Terms & Conditions, and add your payment details
- You submit your payment request
- Candex validates your information and runs standard compliance screening. When everything is clear, funds are transferred to you. This usually takes about a week.

Need Help?

If you need any support throughout, please feel free to reach out to support@candex.com. Please note that you can change your language settings on the platform when you register.

Should you have any questions about the process, please do not hesitate to reach out.

Employee Name

Signature