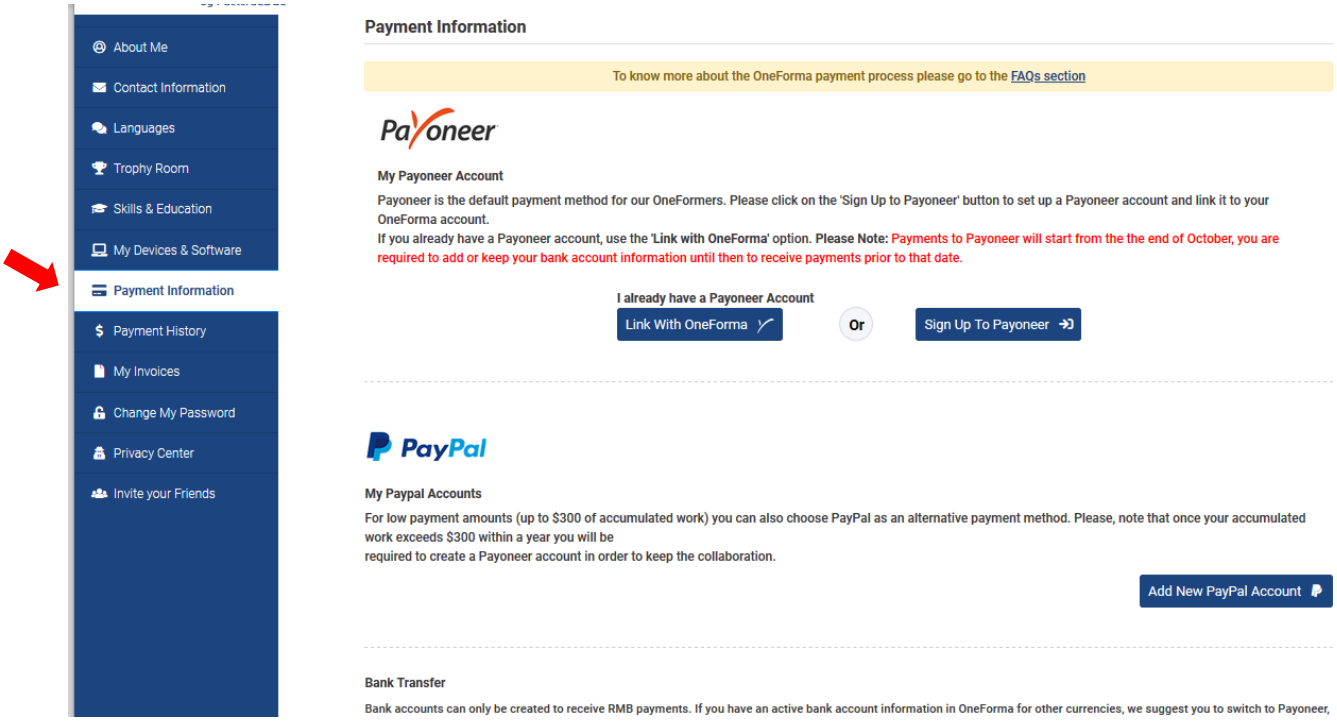
INVOICING GUIDELINES FOR AGENCIES

LEARN HOW PAYMENTS WORK IN ONEFORMA PLATFORM

Please read these guidelines carefully to understand how to upload your payment details into OneForma and how to submit your invoices.

HOW CAN I UPLOAD MY PAYMENT INFORMATION INTO ONEFORMA?

Please Access your company profile from: https://my.oneforma.com/UserPortal/
Go to "**MY PROFILE**" on the top menu. Once you click there, look for the Payment Information section on the left-hand menu:



Payoneer is our preferred payment method. For more information on how to set up an account with Payoneer, please visit https://my.oneforma.com/UserPortal/setting_up_payoneer.pdf

For small payments, less than $300 accumulated in a natural year (January - December), you can select **PayPal** as an alternative.

Please make sure all the information is accurate (no typos, etc.), otherwise your payment will be returned to us with fees and we should charge you those fees in further payments if the mistake was caused from your side.

IMPORTANT! Please note that the minimum amount of earnings that can be transferred via Payoneer or PayPal is 10 USD. If your payment amount does not reach 10USD, we will accumulate the amount until you reach the minimum to transfer the amount. If after three months you still have not reached the amount of 10 USD, we will transfer the amount the following month, which will be 4th months after the initial payment cycle.

PAYMENT CYCLE: WHEN DO I NEED TO SUBMIT MY INVOICE?

Our payment cycles do not match natural months but run from the 26th of the previous month until the 25th of the current month. For example, the July payment cycle runs from 26st of June until 25th of July. All the work that has been completed and delivered within that period will be processed as part of the July payment cycle.
Please make sure your payment information is completed and updated before the end of each payment cycle 25th of every month. If your payment info is not completed, the payment will be blocked.

Our PMs will issue the Purchase Orders (POs) by the 28th of each month, which is the closing date. This date can be slightly affected on exceptional months due to bank holidays.

Invoicing period is from the 28th to the 31st each month (3 calendar days after closing date). **Please make sure to access OneForma and submit your invoice within this period. The deadline for submitting invoices is on the 31st of each month by end of day (or 3 calendar days after closing date).** Invoices issued after invoicing closing date will be processed for payment in the next settlement period. Payment date is the 25th of the following month.

If you have any questions related to payment or if want to change your payment method, please send an email to payment.support@oneforma.com

IN WHICH CURRENCY CAN I BE PAID?

For residents in the People's Republic of China, payments are released in RMB. For all other geographies, payments are released in USD.

In Payoneer you can select to withdraw the money in a number of local currencies. Check Payoneer website for more information on the available currencies.

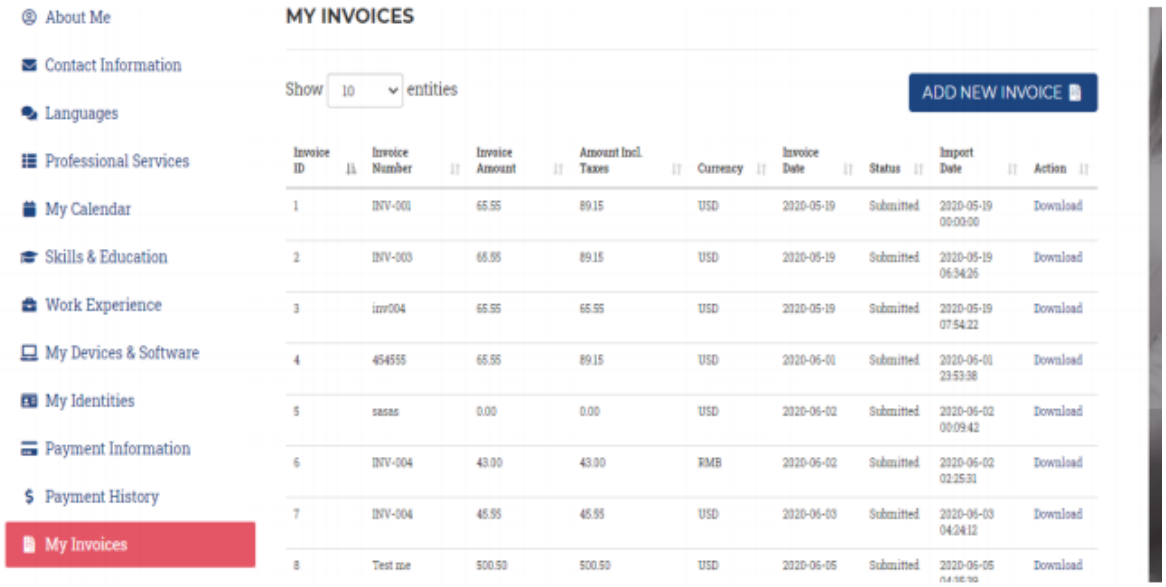
DO I NEED TO PAY ANY FEES OR TAXES?

Pactera EDGE does not charge any fees or withdraw any taxes from your earnings. The amount issued for payment is exactly the same amount as it will appear in your record in OneForma. Please check PayPal or Payoneer website for more details about their fees. Also remember that, as an agency, no matter where you live, you are responsible for reporting any earnings as required by your local laws and paying taxes accordingly.

INVOICING PROCEDURES

Please Access your profile from: https://my.oneforma.com/UserPortal/

Go to "MY PROFILE" on the top menu. Once you click there, you will see a new tab called **My invoices** on the left-hand menu:

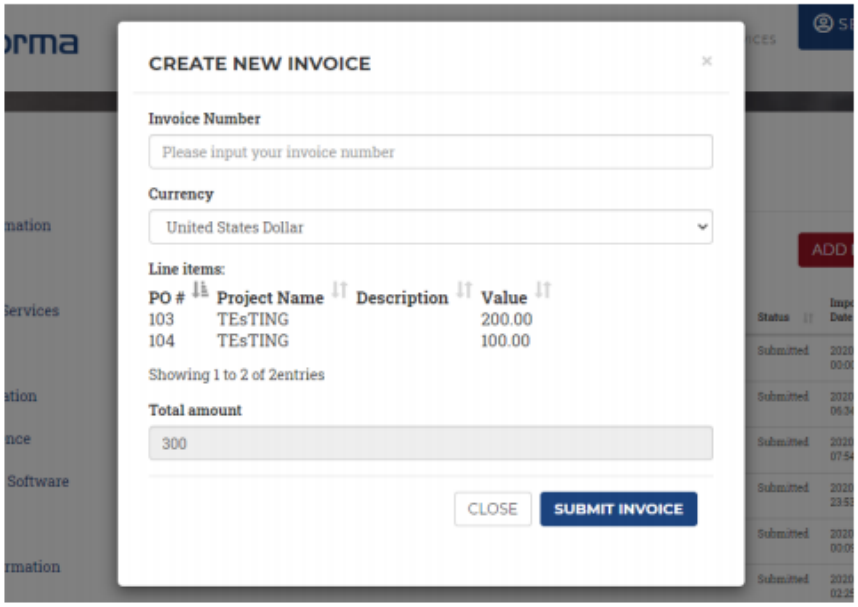


This page will show your previous invoices and provide download links to all of them.

When the payment cycle is closed you will get an email notification inviting you to submit your invoice for all approved POs in that period.

To generate a new invoice, click the “Add New Invoice” button.

A new screen will pop up. Under the **Line items** section, you will see the list of available POs ready for invoicing, with the PO number and associated Project Name. Enter a unique invoice number and click the **Submit Invoice** button to submit it.



The invoice is now submitted, and a copy is available for you to download at any time.

Invoices are submitted for final approval and payment, and the relevant teams are notified.

WHERE CAN I SEE THE PAYMENT AMOUNTS?

You will be able to find that in your profile, in the payments section. Please note that our PMs usually update this information by the 25th of each month, so don’t worry if you can’t immediately see how much you’ve earned, as this is normal.

Questions? Please send an email to payment.support@oneforma.com