

## INVOICING GUIDELINES FOR AGENCIES

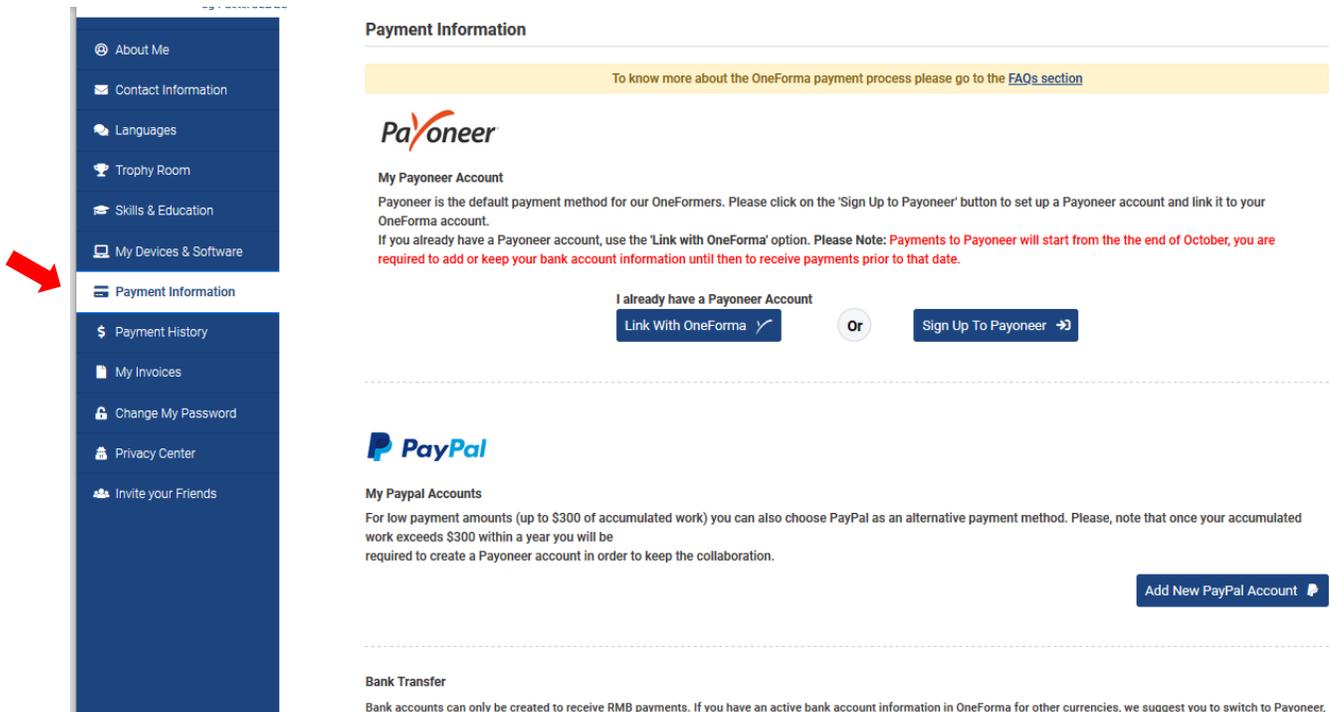
### LEARN HOW PAYMENTS WORK IN ONEFORMA PLATFORM

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:



**Payment Information**

To know more about the OneForma payment process please go to the [FAQs section](#)

**Payoneer**

**My Payoneer Account**

Payoneer is the default payment method for our OneFormers. Please click on the 'Sign Up to Payoneer' button to set up a Payoneer account and link it to your OneForma account.

If you already have a Payoneer account, use the 'Link with OneForma' option. **Please Note: Payments to Payoneer will start from the the end of October, you are required to add or keep your bank account information until then to receive payments prior to that date.**

I already have a Payoneer Account

Link With OneForma ✓  Or

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**PayPal**

**My Paypal Accounts**

For low payment amounts (up to \$300 of accumulated work) you can also choose PayPal as an alternative payment method. Please, note that once your accumulated work exceeds \$300 within a year you will be required to create a Payoneer account in order to keep the collaboration.

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**Bank Transfer**

Bank accounts can only be created to receive RMB payments. If you have an active bank account information in OneForma for other currencies, we suggest you to switch to Payoneer,

**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](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 26<sup>th</sup> of the previous month until the 25<sup>th</sup> of the current month. For example, the July payment cycle runs from 26<sup>st</sup> of June until 25<sup>th</sup> 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 25<sup>th</sup> 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 28<sup>th</sup> 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 28<sup>th</sup> to the 31<sup>st</sup> 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 31<sup>st</sup> 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 25<sup>th</sup> of the following month.

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

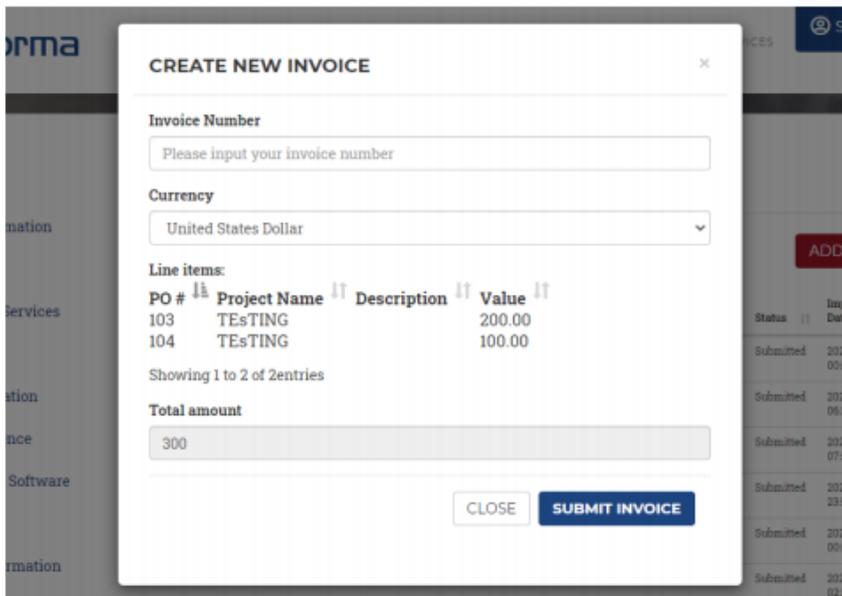
Invoice ID	Invoice Number	Invoice Amount	Amount Incl. Taxes	Currency	Invoice Date	Status	Import Date	Action
1	INV-001	65.95	89.15	USD	2020-05-19	Submitted	2020-05-19 06:09:50	Download
2	INV-003	65.95	89.15	USD	2020-05-19	Submitted	2020-05-19 06:34:25	Download
3	inv004	65.95	65.95	USD	2020-05-19	Submitted	2020-05-19 07:54:22	Download
4	454555	65.95	89.15	USD	2020-06-01	Submitted	2020-06-01 23:53:36	Download
5	ases	0.00	0.00	USD	2020-06-02	Submitted	2020-06-02 00:09:42	Download
6	INV-004	43.00	43.00	RMB	2020-06-02	Submitted	2020-06-02 02:25:31	Download
7	INV-004	45.95	45.95	USD	2020-06-03	Submitted	2020-06-03 04:04:12	Download
8	Test me	500.50	500.50	USD	2020-06-05	Submitted	2020-06-05 14:16:30	Download

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 screenshot shows a modal window titled "CREATE NEW INVOICE" with a close button (X) in the top right corner. The form contains the following fields and sections:

- Invoice Number:** A text input field with the placeholder text "Please input your invoice number".
- Currency:** A dropdown menu currently set to "United States Dollar".
- Line items:** A table with columns for PO #, Project Name, Description, and Value. It lists two items: PO # 103 with Project Name TEStING and Value 200.00, and PO # 104 with Project Name TEStING and Value 100.00. Below the table, it says "Showing 1 to 2 of 2 entries".
- Total amount:** A text input field containing the value "300".
- Buttons:** "CLOSE" and "SUBMIT INVOICE" buttons at the bottom right.

In the background, a sidebar menu is visible with items like "Information", "Services", "Station", "Finance", "Software", and "Information". A table of submitted invoices is also partially visible on the right side of the background.

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 25<sup>th</sup> 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](mailto:payment.support@oneforma.com)