

Tipalti User Guide

Tipalti is the payment automation system we use at Kopius to manage and process outbound payments to our team members efficiently and securely.



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Step 1

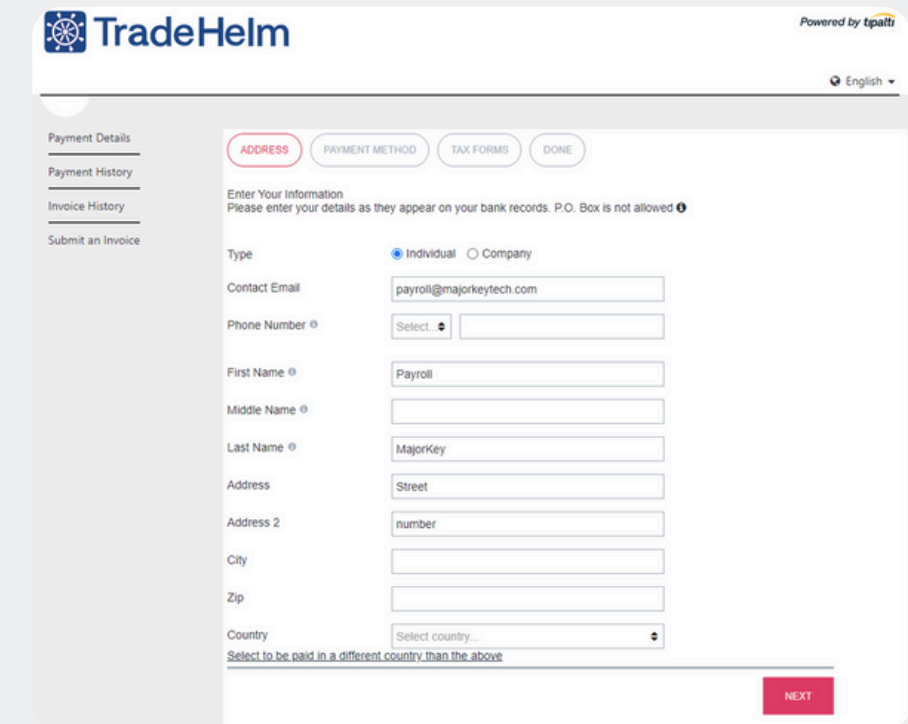
You are going to receive in your personal email:

1. An email from Martina Smither msmither@kopiustech.com with an invoice template attached, and Tipalti log in information.
2. An invitation to Tipalti with the link to access: <https://suppliers.tipalti.com/TradeHelm/account/login>

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Step 2

Once you received your log in info you will need to complete with your personal information →



The screenshot shows the TradeHelm account setup interface. The header includes the TradeHelm logo and a 'Powered by tipalti' badge. A navigation menu on the left lists 'Payment Details', 'Payment History', 'Invoice History', and 'Submit an Invoice'. The main form area has tabs for 'ADDRESS', 'PAYMENT METHOD', 'TAX FORMS', and 'DONE'. The 'ADDRESS' tab is active, displaying a form titled 'Enter Your Information' with the instruction 'Please enter your details as they appear on your bank records. P.O. Box is not allowed'. The form includes fields for 'Type' (Individual/Company), 'Contact Email' (payroll@majorkeytech.com), 'Phone Number' (dropdown), 'First Name' (Payroll), 'Middle Name', 'Last Name' (MajorKey), 'Address' (Street), 'Address 2' (number), 'City', 'Zip', and 'Country' (dropdown). A 'NEXT' button is at the bottom right.

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Step 3 - Payment method

Complete the payment method information: Wire or ACH

1. Name on Account
2. The following information is required if you have an ARG account: CBU and CUIT / CUIL
3. If you are located in Argentina but your account is settled somewhere else, you need to go back to first step and select the following option:

Country

Select to be paid in a different country than the above

If this option does not appear please send an email to payroll@kopiustech.com

4. SWIFT
5. Bank Name
6. Bank Address
7. Branch Name
8. Bank city/province and zip code

✓ * Don't forget to agree with Tradehelm's privacy policy.

ADDRESS PAYMENT METHOD TAX FORMS DONE

Payment Method:

No transaction fees.

Payment Currency: USD

Name on Account:

Account Number:

Phone Number: +93

SWIFT:

Bank Name:

Bank Address:

Bank Address 2:

Bank City, Province, Zip:

Country: Afghanistan

☐ Add Intermediary bank information:

Please review our Privacy Policy

☐ I agree to Tradehelm, Inc.'s Privacy Policy

BACK NEXT



Add Your Account

If you have to open an account

- Please send an email to payroll@kopiustech.com so we can share the information with you.

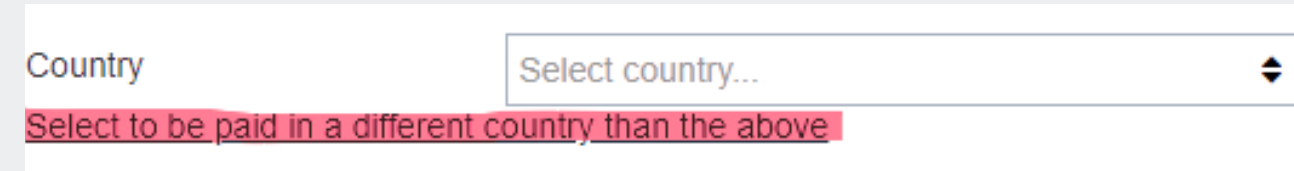
If you already have an account

- Please send an email to **payroll@kopiustech.com** with your Payoneer ID Number so we can add our benefits to your account.

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Step 4 - Once you have your account ready to set it up in Tipalti

First you have to select to be paid in a different country →



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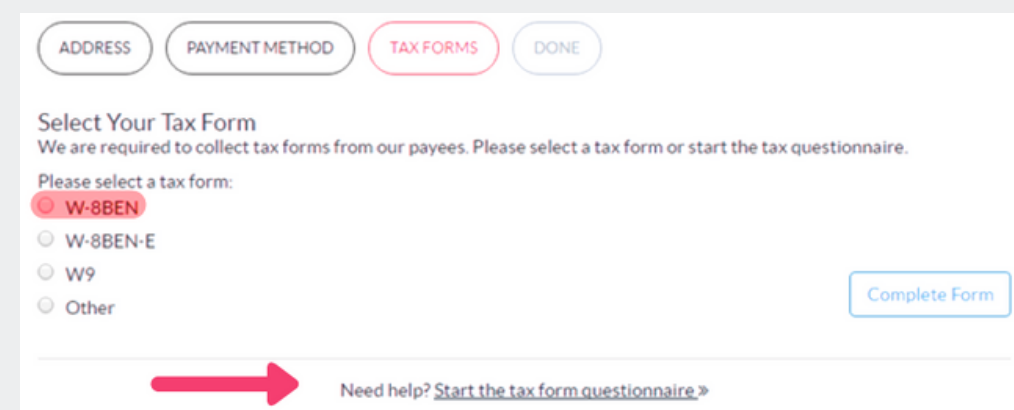
Step 5 - Payment Method

You have to select ACH and complete with your Payoneer information (in Payoneer's web, in the section: RECEIVE/GLOBAL PAYMENT SERVICES you click on the USA Flag and there you will have all the details of your account).

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Step 6 - Tax Form

Since we are not authorized to give you tax advice, the best way to complete it is by answering a few questions →



STEP BY STEP



TAX FORM

- For most cases the correct Tax Form is going to be W-8BEN. If you have doubts regarding which tax form applies in your case, please complete the questionnaire.

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Step 7 - REVIEW

In the tax form, there are several boxes that you will have to check. Before submitting, please review the information entered.

Review

Please review the information you entered below. Click "Continue" to continue to finalize the W-8BEN form. To update any information, click "Back".

Identification of Beneficial Owner

Name	Test Tester
Country of Citizenship	Argentina





STEP BY STEP



INVOICE

- Invoices should be submitted in the first 5 (five) days of each new month after the previous month has finished.

Complete with your personal information

NAME Enter Your Name Here

Address State, Province Phone

SOLD TO:
Name Tradehelm, Inc dba Kopius
Address 3055 112th Ave NE, STE 225
City, State, ZIP Bellevue, WA 98004
FEIN: 26-1907945

SHIPPED TO:
Same

Sales Tax Rate: 0,00%

INVOICE

INVOICE NUMBER change each month
INVOICE DATE Submit date
OUR ORDER NO.
YOUR ORDER NO.
TERMS NET 30
SALES REP
SHIPPED VIA
F.O.B.
PREPAID or COLLECT COLL

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
160,00	Professional Services July 2023 PROJECT: (as it appears in BigTime "project" field)	10,00	\$1.600,00

Hours you worked that month
(must match BigTime hours)

Hourly rate
(as listed in your Agreement)

IMPORTANT INFORMATION ABOUT HOW TO FILL THE INVOICE

The system will not allow payments on a duplicated invoice number.

- When you are submitting invoices it is extremely important for you to enter an invoice number. You can use whatever you like just so that **each month it changes and cannot be repeated**. Don't use "1" each time and do not leave it blank. It is also important for you to **change the Description and to change the month and year accordingly**.

Invoice template

- For those of you using the **invoice template provided by Kopius** the areas of importance are highlighted in yellow.
- If you are using an **invoice template of your own creation** please be sure to update the Invoice number and description correctly. It is important that you complete the description with the name of your **PROJECT (the same name as it appears in BigTime)**.
- **Terms are NET30** unless you are informed different. Terms are listed in your Agreement.

Contact Us!

For assistance, please reach out to the appropriate contact based on your issue →



TIPALTI CREDENTIALS OR INVOICES ISSUES

Martina Smither
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HOURS/BIGTIME ISSUES

People Operations Team
payroll@kopiustech.com





**THANK
YOU!**

