

Getting Started

A practical guide for Admin Users

JULY 2019

Contents

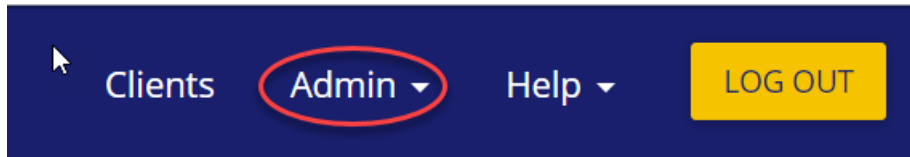
CUSTOMIZING3

- 4.01 PRE-TRIP QUESTIONS..... 3
- 4.02 PRE-TRIP CONDITIONS 4
- 4.03 PER DIEM RULES 6
- 4.04 PROJECTS AND ACTIVITIES..... 8
- 4.05 COST CENTERS 9
- 4.06 BUSINESS UNITS..... 10
- 4.07 PRE-TRP RECIPIENTS 11
- 4.08 CASE TYPES 10

CUSTOMIZING

Options found under ADMIN in the navigation bar

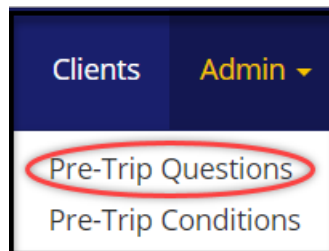
Pre-Trip Questions and Pre-Trip Conditions are set across the entire portal i.e. the Parent company and all Subsidiary Units.



4.01 Pre-Trip Questions

To change the pre-trip questions posed to travellers:

1. Select Pre-Trip Questions from the Admin drop-down list.



The questions currently associated with the parent company/subsidiary unit will be shown on the screen.

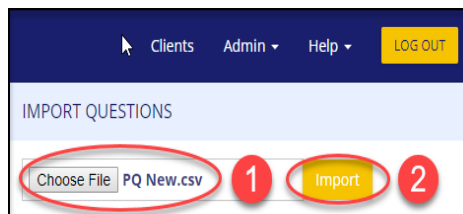
Pre-Trip Questions				
QUESTION	ANSWER TYPE	OPTIONS	REQUIRED	TAG
Salary paid in home or host location	options	Home, Host, Bureau	false	SALARY
Do you have a Yellow Fever certificate?	options	Yes, No	false	YELLOW
Do you have medical insurance to cover you in this country/countries?	options	Yes, No	false	INSURANCE
Were you ever denied entry into this country/countries?	options	Yes, No	false	DENIED
If you were denied entry please provide more details	text		false	

To change the pre-trip questions, use the Pre-Trip Questions Template. The template columns are shown below:

Column Label	Field Type
Pre-Trip Question	Free text
Answer Type	Indicates whether the answer is free text or menu driven via scroll wheel
Options	Creates options on a scroll wheel
Required	Determines if the question is mandatory

Use the template to create new questions and save as a CSV file.

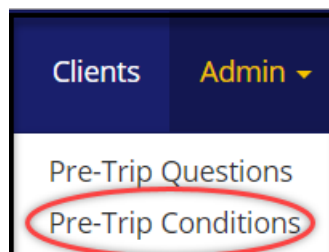
1. Select Choose file and select the CSV file from your saved documents
2. Select Import, as shown below:



The portal will validate the data. If errors are detected in the file format the data will not upload. The CSV file should be reviewed. Common errors are hidden data and/or extra spacing in cells.

4.02 Pre-Trip Conditions

To manage pre-trip conditions select Pre-Trip Conditions from the Admin drop-down list.



The default conditions will be shown on the screen.

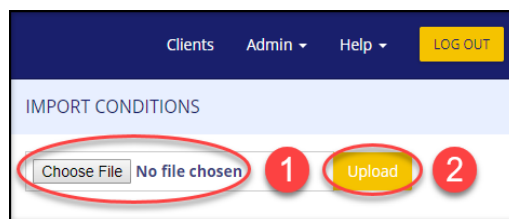
Pre-Trip Conditions	
157 conditions found	
NAME	NATIONALITY
NON_VISA_NATIONAL_AUSTRIA	Andorra Argentina Australia Brunei Darussalam Canada Chile Colombia Costa Rica Dominica El Salvador Grenada Guatemala Honduras Israel Japan Kiribati Korea, Republic of Malta New Zealand Nicaragua Palau Panama Paraguay Peru Samoa San Marino Singapore Solomon Islands Saint Lucia Saint Vincent and the Grenadines Timor-Leste Tonga Trinidad and Tobago Venezuela, Bolivarian Republic of Belgium Bulgaria Croatia Cyprus Czech Republic Denmark Estonia Finland France Germany Greece Hungary Iceland Ireland Italy Latvia Liechtenstein Lithuania Luxembourg Malta Netherlands Norway Poland Portugal Romania Barbuda Bahamas Barbados Brazil Mauritius Seychelles Saint Kitts and Nevis Georgia Moldova, Republic of Ukraine Albania Bosnia and Herzegovina Macedonia, Republic of Montenegro
NON_VISA_NATIONAL_CANADA	United States
NON_VISA_NATIONAL_DENMARK	Andorra Argentina Australia Brunei Darussalam Canada Chile Colombia Costa Rica Dominica El Salvador Grenada Guatemala Honduras Israel Japan Kiribati Korea, Republic of Malta New Zealand Nicaragua Palau Panama Paraguay Peru Samoa San Marino Singapore Solomon Islands Saint Lucia Saint Vincent and the Grenadines Timor-Leste Tonga Trinidad and Tobago Venezuela, Bolivarian Republic of Austria Belgium Bulgaria Croatia Cyprus Czech Republic Estonia Finland France Germany Greece Hungary Iceland Ireland Italy Latvia Liechtenstein Lithuania Luxembourg Malta Netherlands Norway Poland Portugal Romania Barbuda Bahamas Barbados Brazil Mauritius Seychelles Saint Kitts and Nevis Georgia Moldova, Republic of Ukraine Albania Bosnia and Herzegovina Macedonia, Republic of Montenegro
NON_VISA_NATIONAL_ESTONIA	Andorra Argentina Australia Brunei Darussalam Canada Chile Colombia Costa Rica Dominica El Salvador Grenada Guatemala Honduras Israel Japan Kiribati Korea, Republic of Malta New Zealand Nicaragua Palau Panama Paraguay Peru Samoa San Marino Singapore Solomon Islands Saint Lucia Saint Vincent and the Grenadines Timor-Leste Tonga Trinidad and Tobago Venezuela, Bolivarian Republic of Austria Belgium Bulgaria Croatia Cyprus Czech Republic Denmark Finland France Germany Greece Hungary Iceland Ireland Italy Latvia Liechtenstein Lithuania Luxembourg Malta Netherlands Norway Poland Portugal Romania Barbuda Bahamas Barbados Brazil Mauritius Seychelles Saint Kitts and Nevis Georgia Moldova, Republic of Ukraine Albania Bosnia and Herzegovina Macedonia, Republic of Montenegro
NON_VISA_NATIONAL_FINLAND	Andorra Argentina Australia Brunei Darussalam Canada Chile Colombia Costa Rica Dominica El Salvador Grenada Guatemala Honduras Israel Japan Kiribati Korea, Republic of Malta New Zealand Nicaragua Palau Panama Paraguay Peru Samoa San Marino Singapore Solomon Islands Saint Lucia Saint Vincent and the Grenadines Timor-Leste Tonga Trinidad and Tobago Venezuela, Bolivarian Republic of Austria Belgium Bulgaria Croatia Cyprus Czech Republic Denmark Estonia France Germany Greece Hungary Iceland Ireland Italy Latvia Liechtenstein Lithuania Luxembourg Malta Netherlands Norway Poland Portugal Romania Barbuda Bahamas Barbados Brazil Mauritius Seychelles Saint Kitts and Nevis Georgia Moldova, Republic of Ukraine Albania Bosnia and Herzegovina Macedonia, Republic of Montenegro
NON_VISA_NATIONAL_FRANCE	Andorra Argentina Australia Brunei Darussalam Canada Chile Colombia Costa Rica Dominica El Salvador Grenada Guatemala Honduras Israel Japan Kiribati Korea, Republic of Malta New Zealand Nicaragua Palau Panama Paraguay Peru Samoa San Marino Singapore Solomon Islands Saint Lucia Saint Vincent and the Grenadines Timor-Leste Tonga Trinidad and Tobago Venezuela, Bolivarian Republic of Austria Belgium Bulgaria Croatia Cyprus Czech Republic Denmark Estonia Finland France Germany Greece Hungary Iceland Ireland Italy Latvia Liechtenstein Lithuania Luxembourg Malta Netherlands Norway Poland Portugal Romania Barbuda Bahamas Barbados Brazil Mauritius Seychelles Saint Kitts and Nevis Georgia Moldova, Republic of Ukraine Albania Bosnia and Herzegovina Macedonia, Republic of Montenegro

To change pre-trip conditions, use the Pre-Trip Conditions Template. The template columns are shown below:

Column Label	Definition
Name	Visa category
Nationality	Nationality of traveller
Visiting Country	Country name (can be a list of multiple countries)

To change the pre-trip conditions, use the template to create new conditions and save as a CSV file.

1. Select Choose file and select the CSV file from your saved documents
2. Select import, as shown below



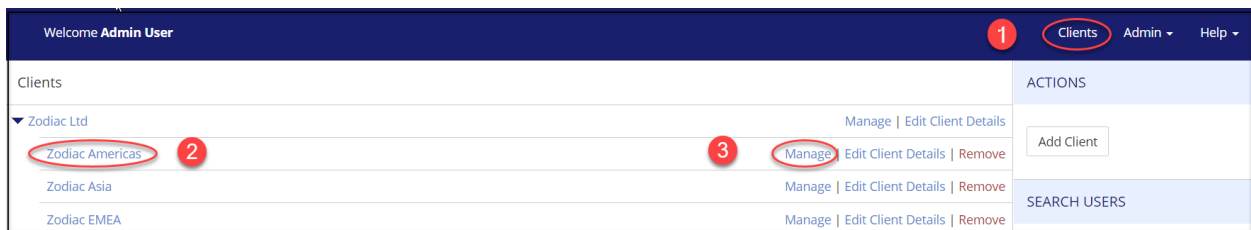
The portal will validate the data. If errors are detected in the file format the data will not upload. The CSV file should be reviewed. Common errors are hidden data and/or extra spacing in cells.

Options found under COMPANY in the navigation bar

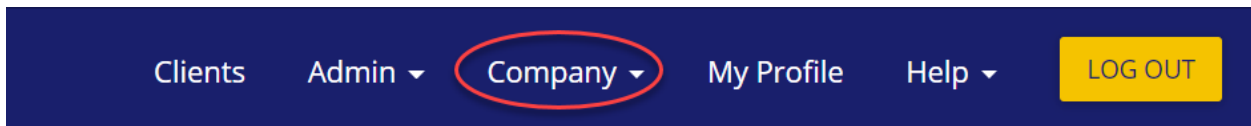
The configuration options listed under the Company tab can be set at the individual Company/Subsidiary Unit level.

To find the options

1. Select Client.
2. Select the parent company/subsidiary unit you wish the per diem rules to be associated with.
3. Select Manage.

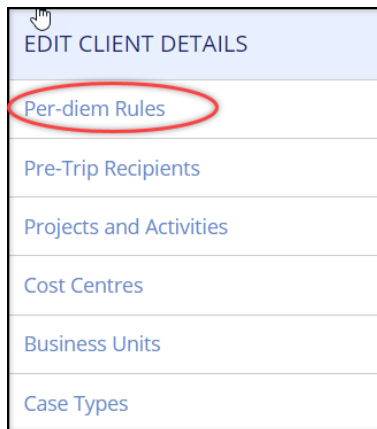


4. Select Company from the navigation bar.



4.03 Per Diem Rules

To manage per diems, select Per-diem from the drop-down options:



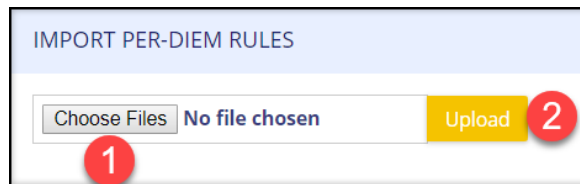
The per diem rules being applied will be shown on screen. To change the per diems, use Per Diem Template. The template columns are shown below.

Column Label	Definition
Effective from	Date from which per diem is paid
City, State, Country	Location used to calculate per diem
Category	Reason for per diem payment; Meals, Lodging, Both
Amount	Per diem paid
Government Amount	Per diem set by government (as applicable)

EFFECTIVE FROM	CITY	CATEGORY	AMOUNT	GOVERNMENT AMOUNT
March 01, 2018	Berlin, Germany	Lodging	80.00	
March 01, 2018	Bristol, United Kingdom	Lodging	120.00	
March 01, 2018	Chengdu, China (Sichuan)	Lodging	70.00	
March 01, 2018	Dublin, Ireland	Lodging	80.00	
March 01, 2018	Houston, United States (Texas)	Lodging	99.00	
March 01, 2018	London, United Kingdom	Lodging	100.00	
March 01, 2018	Lyon, France	Lodging	40.00	

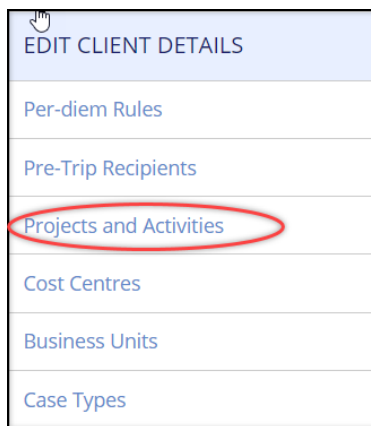
Use the template to list per-diems and save as a CSV file.

1. Select Choose file and select the CSV file from your saved documents.
2. Select Upload.



4.04 Projects and Activities

To manage Project and Activities, select Projects and Activities from the drop-down options.



Projects and Activities can be Free Text or Hard coded. The projects and activities currently being used will display on screen.

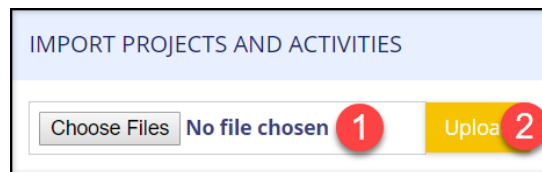
PROJECTS AND ACTIVITIES	
PROJECT	ACTIVITY
Alpha	Client Visit
Alpha	Training
Alpha	Travelling
Beta	Client Visit
Beta	Training
Beta	Travelling

If projects and activities have not been uploaded, wording will display 'No projects and activities found'. To change the projects and activities, use the Activities Template. The template columns are shown below:

Column Label	Definition
Project	Project Name
Activity	Description of Activity

Use the template to list projects and activities and save as a CSV file.

1. Go to the Import Projects and Activities box found on the left of the screen. Select Choose file and select the CSV file from your saved documents.
2. Select Upload.



4.05 Cost Centres

To manage Cost Centres, select Cost Centres from the drop-down options:



The Cost centres currently available will display on the screen.

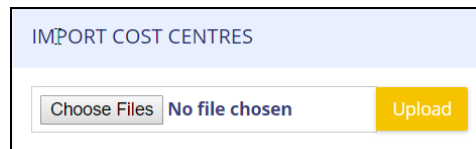
COST CENTRES
COST CENTRE
ABC123
ABC456
ABC789

If cost centres have not been uploaded, wording will display 'No cost centre units found'. To change the cost centres, use the Cost Centre Template.

Column Label	Definition
Cost Centre	Cost Centre (numerical and alpha)
Location	Cost Centres can be grouped by location. Leave location blank, if Cost Centres are not location dependent.

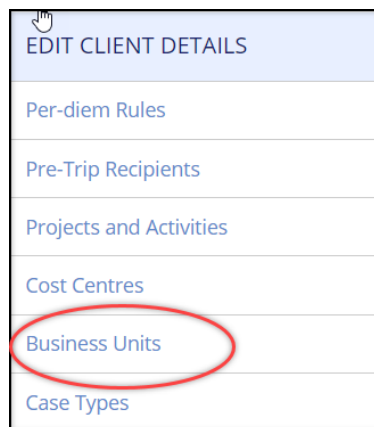
Use the template to list the cost centers and save as a CSV file.

1. Go to the Import Cost Centre box found on the left of the screen. Select Choose file and select the CSV file from your saved documents
2. Select Upload



4.06 Business Units

To manage Business Units, select Business Units from the drop-down options:



The business units currently available will display on screen or a message confirming 'No business units found'.

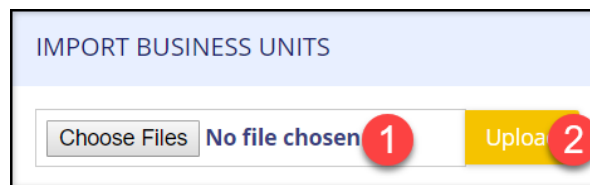
BUSINESS UNITS
BUSINESS UNIT
<i>No business units found</i>

To change the business units, use the Business Unit Template.

Column Label	Definition
Business Unit	Name of Business Unit

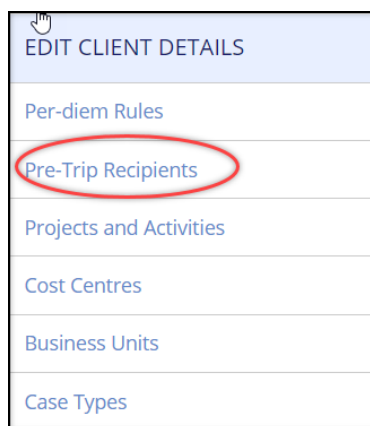
Use the template to list the business units and save as a CSV file.

1. Go to the Import Business Unit box found on the left of the screen. Select Choose file and select the CSV file from your saved documents.
2. Select Upload.



4.07 Pre-Trip Recipients

To manage Pre-Trip Recipients, select Pre-Trip Recipients from the drop-down options:



The pre-trip recipients currently assigned will display on the screen or a message confirming 'No recipients found'.

PRE-TRIP RECIPIENTS	
COUNTRY	RECIPIENT
Spain	Immigration assessor Spain@taxassess.com Tax assessor Spain@immigration.com
Thailand	Immigration assessor Thailand@taxassess.com Tax assessor Thailand@immigration.com
Colombia	Immigration assessor Colomobia@taxassess.com Tax assessor Colombia@immigration.com

1. To change the Recipients, use the Pre-Trip Recipient Template.

Column Label	Definition
Visiting Country	Location traveller will visit
Visiting State	State traveller will visit (if applicable)
Tax Assessor	Details of person responsible for reviewing tax compliance
Immigration Assessor	Details of person responsible for reviewing immigration compliance

2. Use the template to list the assessors and save as a CSV file.
3. Go to the Import Pre-Trip Recipients box found on the left of the screen. Select Choose file and select the CSV file from your saved documents.
4. Select Upload.

4.08 Case Types

To manage Case Types, select Case Types from the drop-down options:

EDIT CLIENT DETAILS
Per-diem Rules
Pre-Trip Recipients
Projects and Activities
Cost Centres
Business Units
Case Types

The case types currently available will display on the screen.

CASE TYPES
CASE TYPE
Employee Review
Permanent establishment Review
Social Security Certificate
Tax Registration Process
Tax Return
Visa Production
Withholding Process request
Work Permit Production

1. To change the case types, use the Cast Type Template. Use the template to list the case types you would like displayed in the portal and save as a CSV file

Case Type
Employee Review
Tax Return
Visa Production
Work Permit Production

Go to the Import Case Type box found on the left of the screen. Select Choose file and select the CSV file from your saved documents. Remember to select Upload.

IMPORT CASE TYPES

Choose Files
No file chosen
Upload