

Getting Started

A practical guide for Admin Users

JULY 2019

Contents

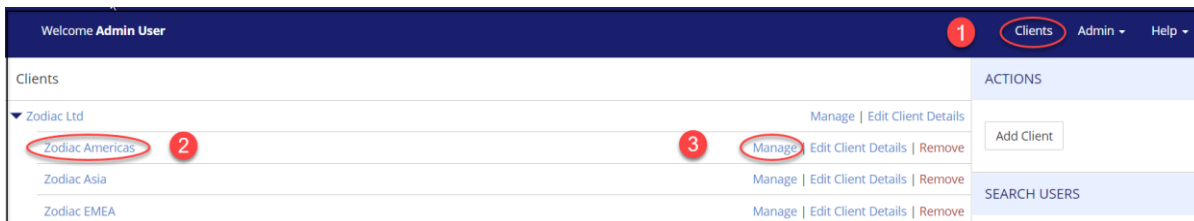
CASE FILES	3
13.01 ADD CASE FILES	3
13.02 CHANGE CASE FILE STATUS	6
13.03 VIEW AND EDIT CASES	7
13.04 CUSTOMIZING CASE DATA – ADDING SERVICE PROVIDER	8
13.05 CUSTOMIZING CASE DATA – CASE TYPES	10
13.06 DOWNLOAD CASE DETAILS	12

CASE FILES

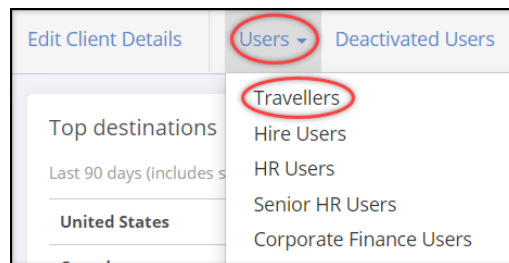
13.01 Add Case Files

To add a case file:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



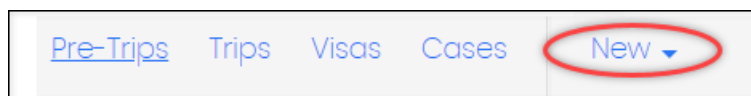
4. Select Users from the navigation bar and Travellers from the drop-down list.

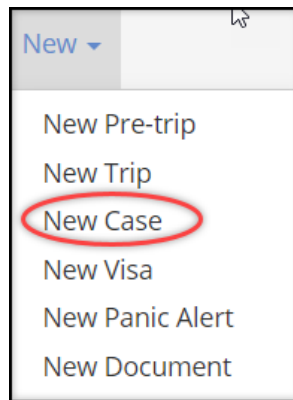


5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		5 View Edit Deactivate 6
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select New and then New Case from the drop-down list





8. Enter Case details into the Case Screen. Select Create a Case to save the details

New Case

* Service provider

* Case type

* Birth country
Select an Option

* Sending country
Select an Option

* Physical job country
Select an Option

* Receiving country
Select an Option

* Job title

Start date End date

* Payroll location
Select an Option

Salary Salary currency Proposed salary Proposed salary currency

Manager first name Manager last name Manager email

Function

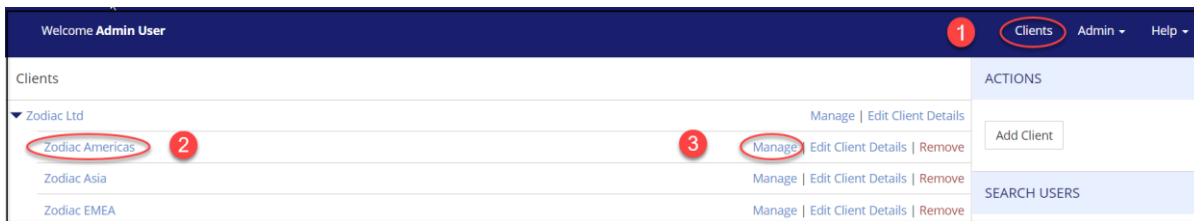
* Billing country
Select an Option

* Billing legal entity

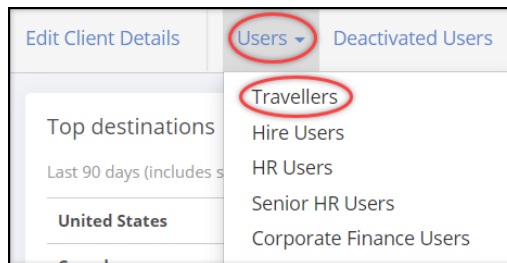
Purchase order

13.02 Change Case File Status

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



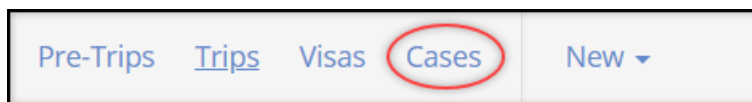
4. Select Users from the navigation bar and Travellers from the drop-down list



5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View Edit Deactivate
Melissa	True	Spain	Spain		View Edit Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View Edit Deactivate

7. Select cases



8. Select Edit Case

LATEST CASES						
STATUS	IDENTIFIER	VENDOR	TYPE	USER	CREATED	
In progress	6	Immigration Provider	Visa Production	Liam Brennan	19 Jul 2019	View Case Edit Case
Not started	5	Tax Provider	Tax Registration Process	Liam Brennan	19 Jun 2019	View Case Edit Case

9. Select the appropriate case status from the drop-down options. Remember to select Update Client Case found at the bottom of the case form.

The screenshot shows a form titled "Edit Case". At the top left, there is a label "* Status" circled in red. Below it is a dropdown menu with "Closed" selected. Below the dropdown is a label "* Service provider".

13.03 View and Edit Cases

Note that cases can be cancelled by changing their status but cannot be deleted from the portal.

You can view and edit cases by following the instructions in 13.02 above or use the Case summary:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage

The screenshot shows a dashboard with a dark blue header. The header contains "Welcome Admin User" on the left and navigation links "Clients", "Admin", and "Help" on the right. The "Clients" link is circled in red with a red circle containing the number "1". Below the header is a table of clients. The table has a column for client names and a column for actions. The client "Zodiac Americas" is circled in red with a red circle containing the number "2". The "Manage" button next to it is also circled in red with a red circle containing the number "3". The table lists "Zodiac Ltd" as the parent company, with "Zodiac Americas", "Zodiac Asia", and "Zodiac EMEA" as subsidiaries. Each subsidiary has "Manage | Edit Client Details | Remove" as actions. On the right side of the table, there is a sidebar with "ACTIONS" (containing "Add Client") and "SEARCH USERS".

4. From the home page dashboard select Latest Cases

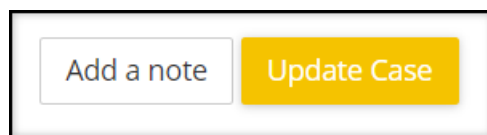
The screenshot shows a dashboard with three main sections: 'Permanent Establishment Risk', 'Most common alerts', and 'Highest risk trips'. Below these sections are two navigation links: 'LATEST PRE-TRIPS' and 'LATEST CASES'. The 'LATEST CASES' link is circled in red.

5. From the list of case that appears, select view or edit against the applicable case.

The screenshot shows a table with the following data:

STATUS	IDENTIFIER	VENDOR	TYPE	USER	CREATED	
In progress	6	Immigration Provider	Visa Production	Liam Brennan	19 Jul 2019	View Case Edit Case
Not started	5	Tax Provider	Tax Registration Process	Liam Brennan	19 Jun 2019	View Case Edit Case

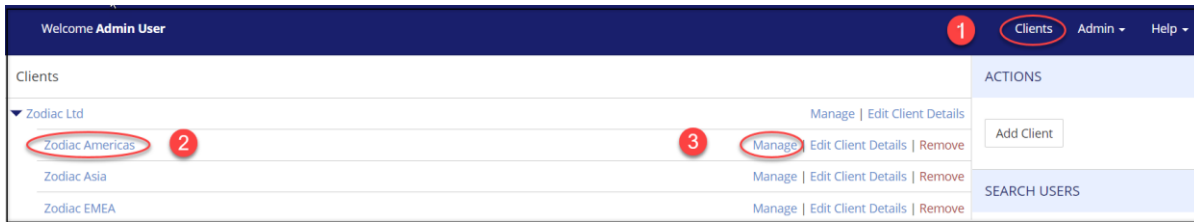
6. If you edit the case, remember to select Update Case



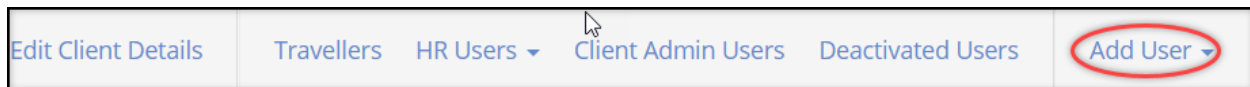
13.04 Customizing Case Data – Adding Service Provider

You can add the details of Service Providers into the portal, so they appear in the Service Provider field in the case screen. To add Third Party Vendor details:

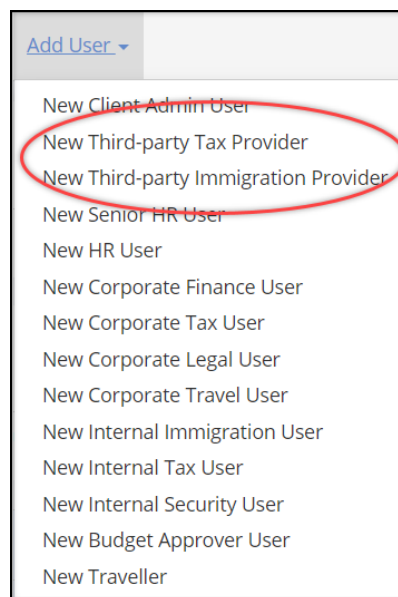
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. From the navigation bar select New User



5. Choose the applicable vendor type from the drop-down



6. Complete the form and select Create User

New Third-party Tax Provider

Integration type

Email

Privacy policy acceptance date

Not accepted

*** Email**

admin@zodiac.com

*** Password**

.....

Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit

*** First name**

*** Last name**

Create User

13.05 Customizing Case Data – Case Types

You can add Case Types, so they appear in the Case Type field in the case screen. To manage Case Types:

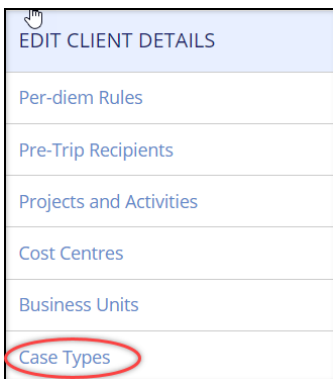
1. Select edit client

Clients

▶ Zodiac Ltd

Manage [Edit Client Details](#)

2. select Case Types from the drop-down options:



The case types currently available will display on the screen.



3. 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

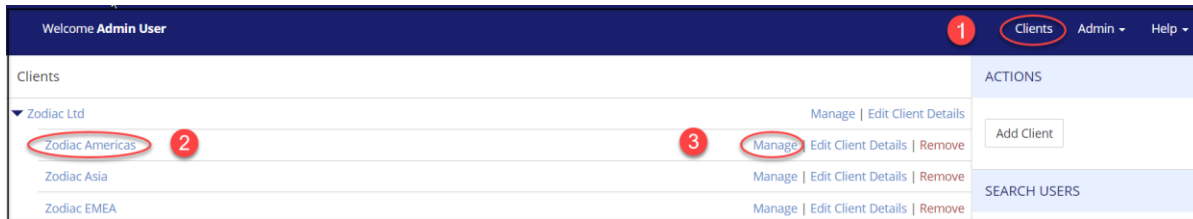
Case Type
Employee Review
Tax Return
Visa Production
Work Permit Production

4. 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.
5. Select Upload

13.06 Download Case Details

You can generate a report of cases:

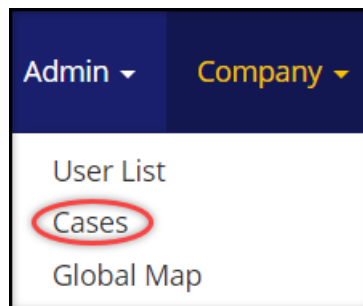
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Company from the navigation bar



5. Select Cases from the drop-down options



6. Select Download as CSV, to generate a report that shows status, case identifier, vendor, case type, traveller name, creator

