Getting Started

A practical guide for Admin Users

JULY 2019

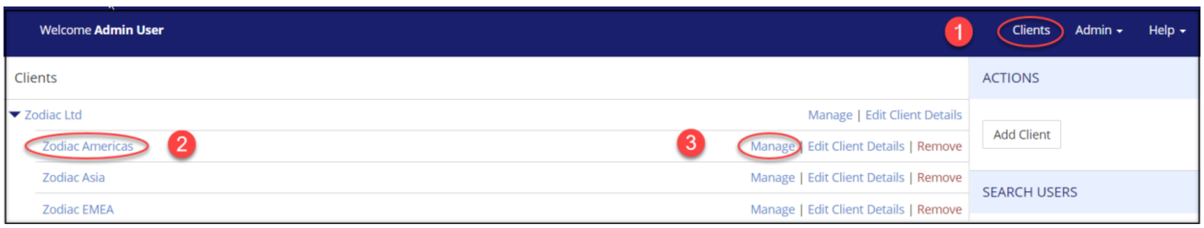
Contents

CASE FILES

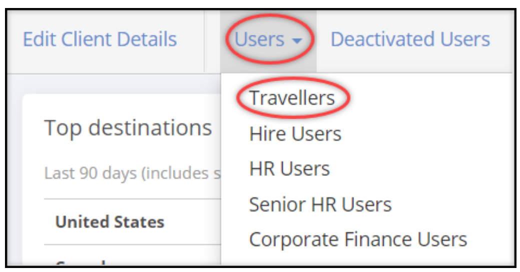
13.01 Add Case Files

To add a case file:

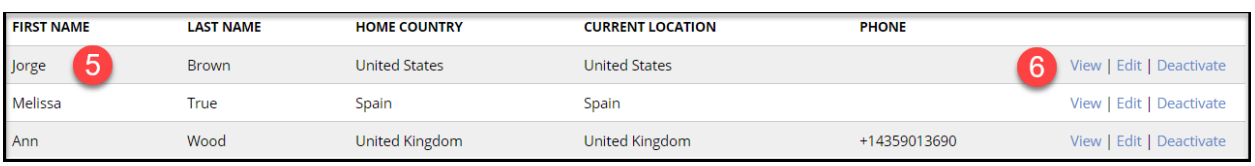
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



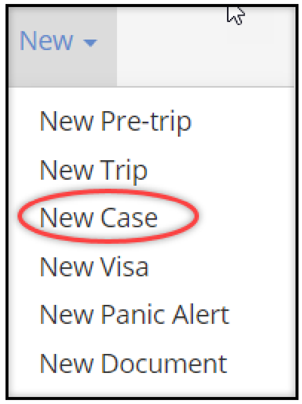
4. Select Users from the navigation bar and Travellers from the drop-down list.



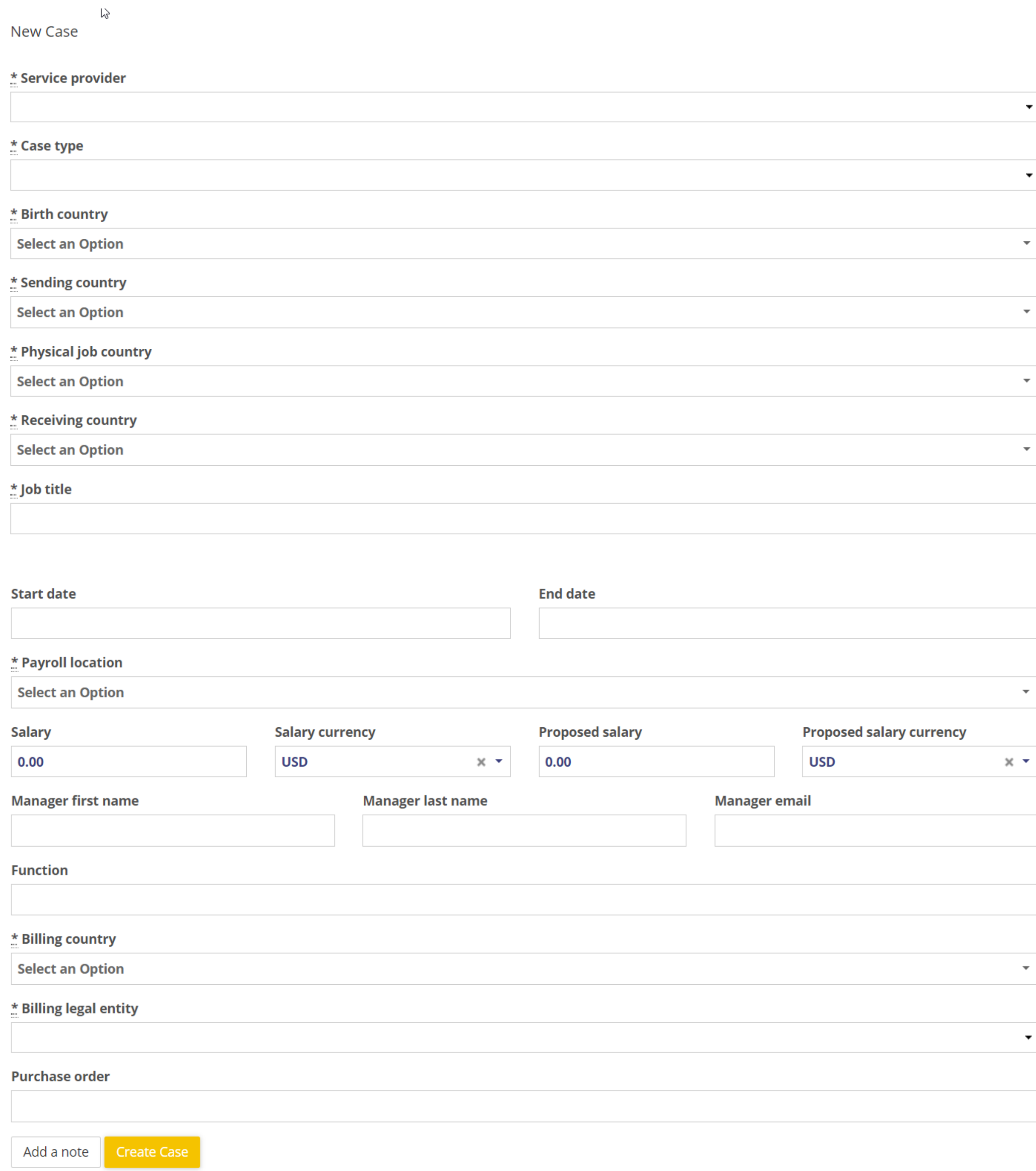
5. Select the traveller
6. Select view



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

0.00

Salary currency

USD

Proposed salary

0.00

Proposed salary currency

USD

Manager first name

Manager last name

Manager email

Function

* Billing country

Select an Option

* Billing legal entity

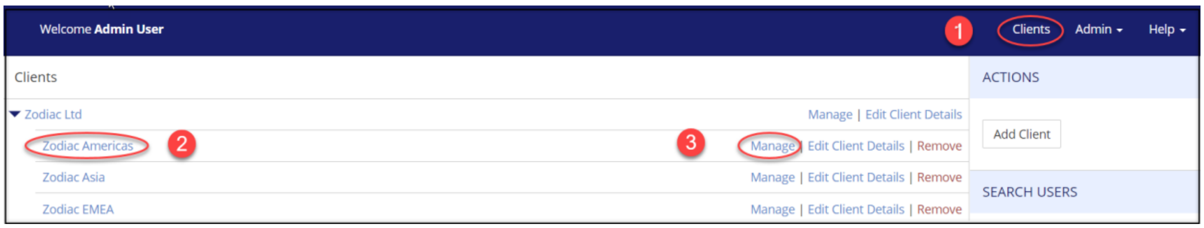
Purchase order

Add a note

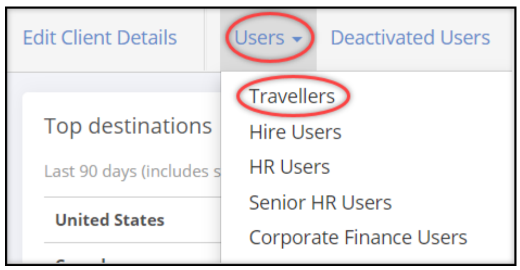
Create Case

13.02 Change Case File Status

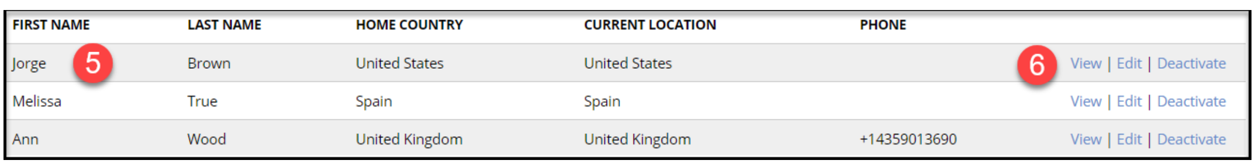
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



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

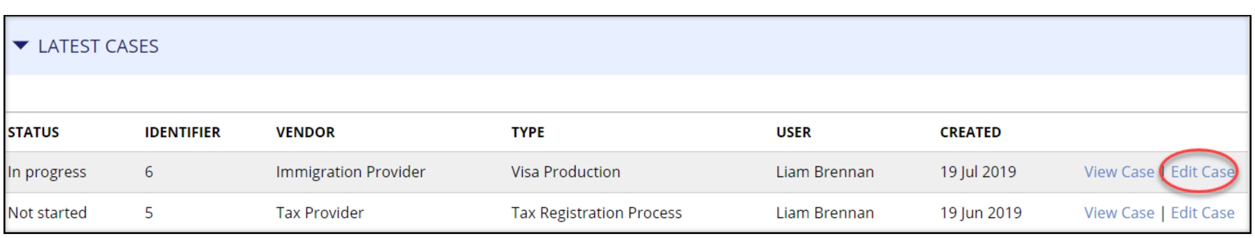


5. Select the traveller
6. Select view

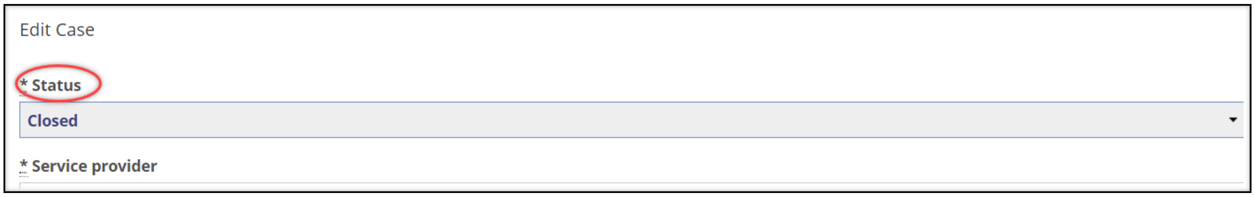


7. Select cases

8. Select 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.

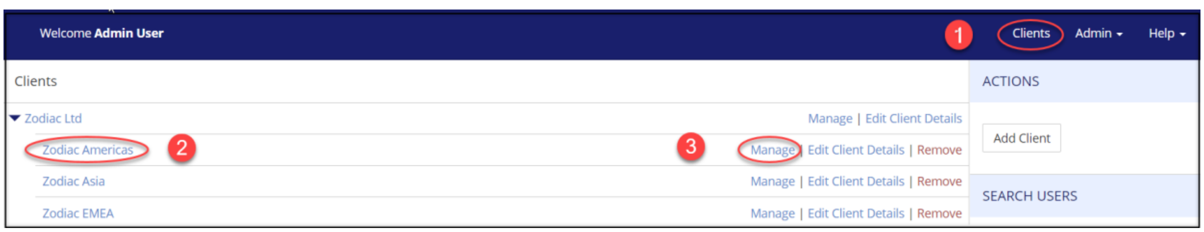


13.03 View and Edit Cases

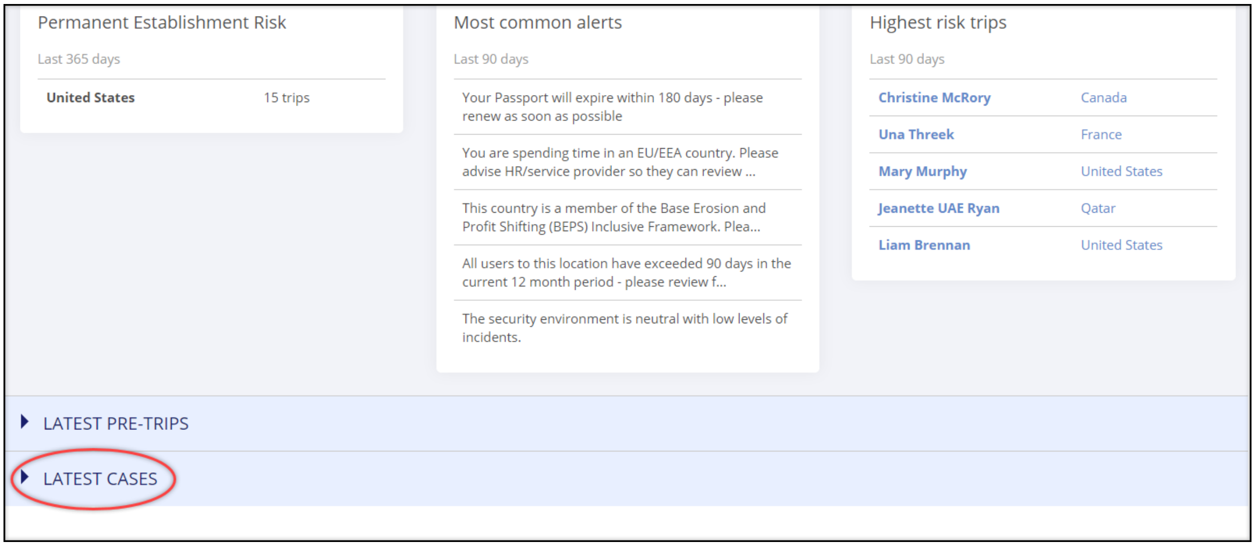
Note that cases can be cancelled by changing their status but cannot be deleted from the portal.

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

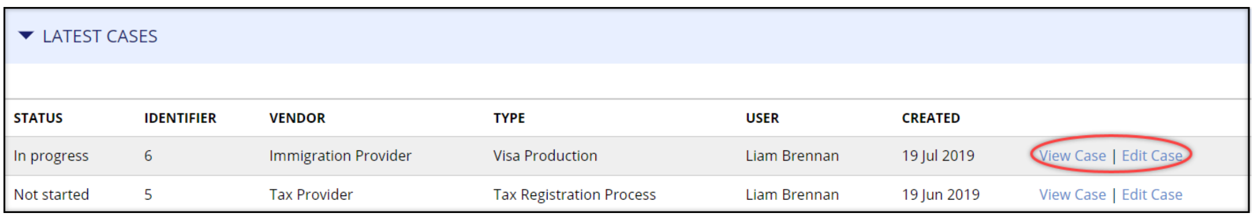
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. From the home page dashboard select Latest Cases

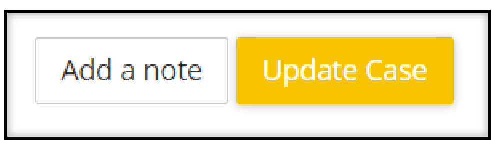


5. From the list of case that appears, select view or edit against the applicable case.


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

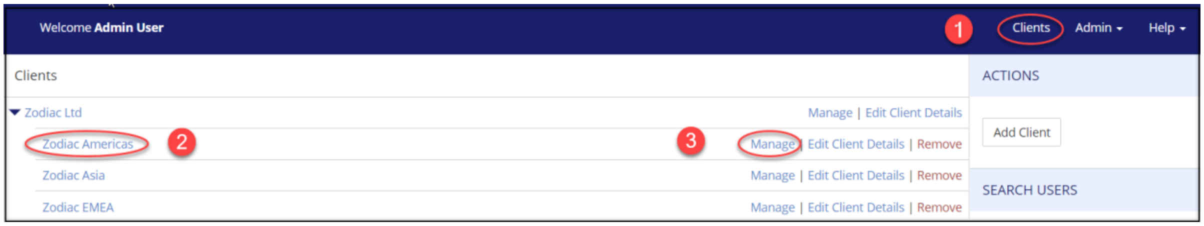
6. If you edit the case, remember to select Update Case



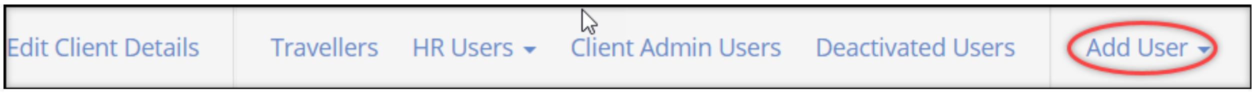
13.04 Customizing Case Data – Adding Service Provider

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:

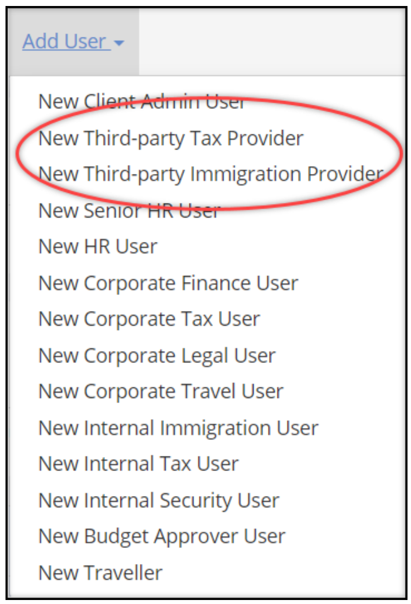
1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



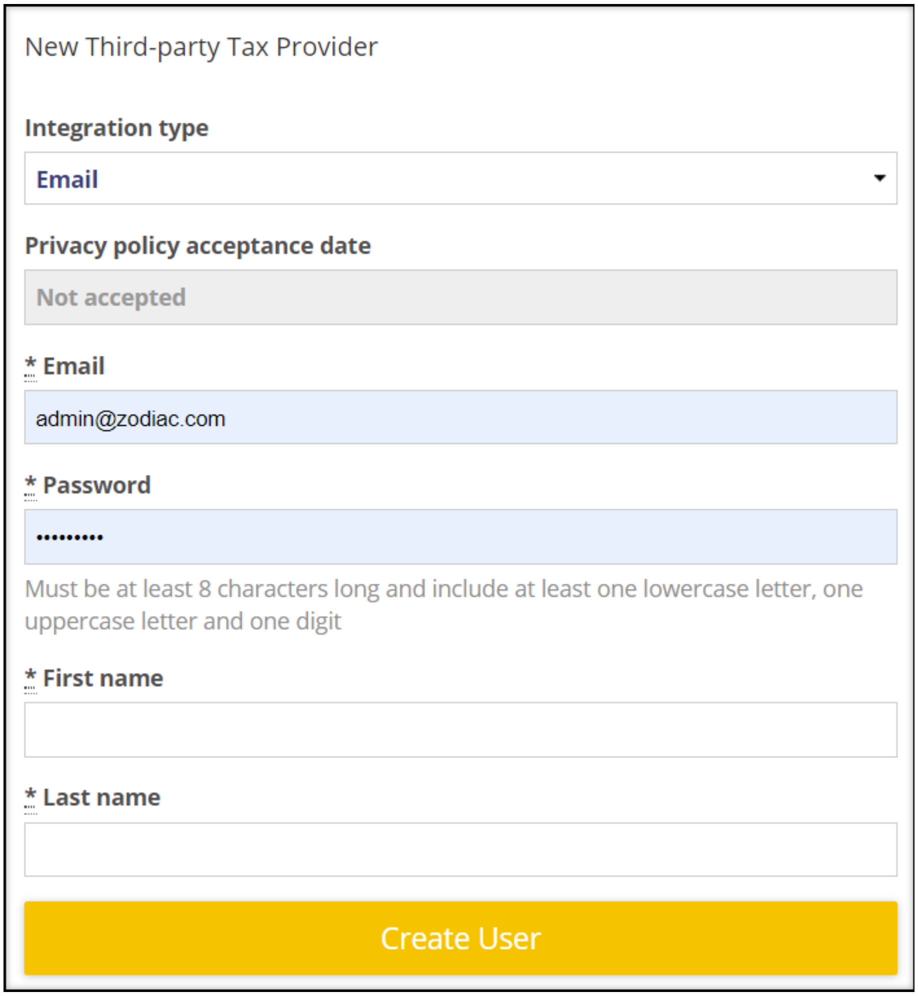
4. From the navigation bar select New User



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



6. Complete the form and select Create User

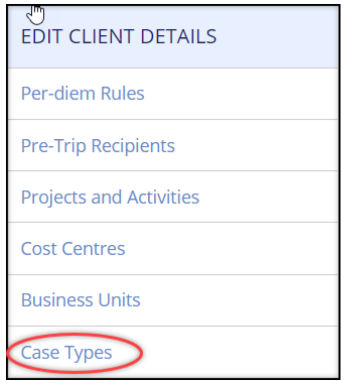


13.05 Customizing Case Data – Case Types

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

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

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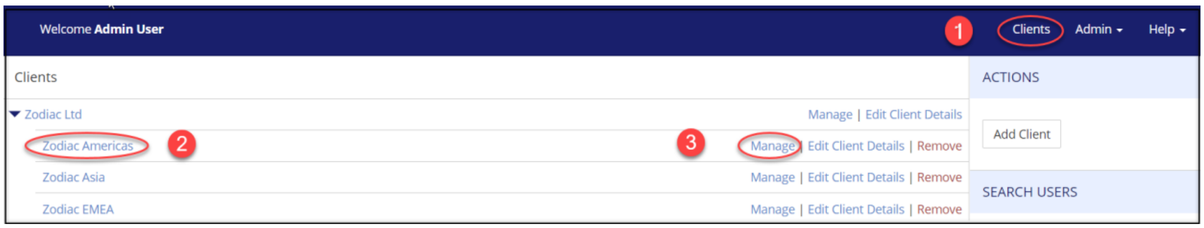
4. Go to the Import Case Type box found on the left of the screen. Select Choose file and select the CSV file from your saved documents.
5. Select Upload

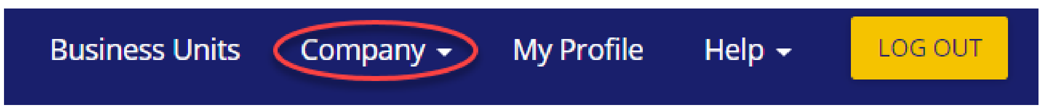
13.06 Download Case Details

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