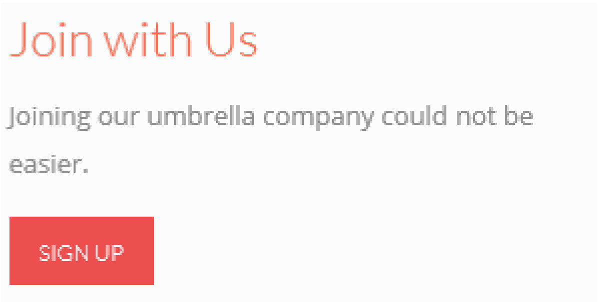
MAC Accountancy Services

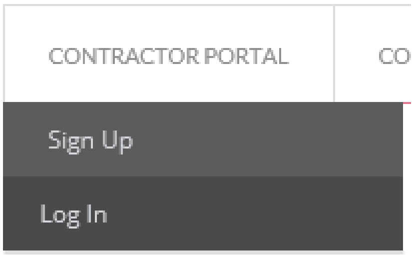
Portal Quick Guide for Contractors

Sign up

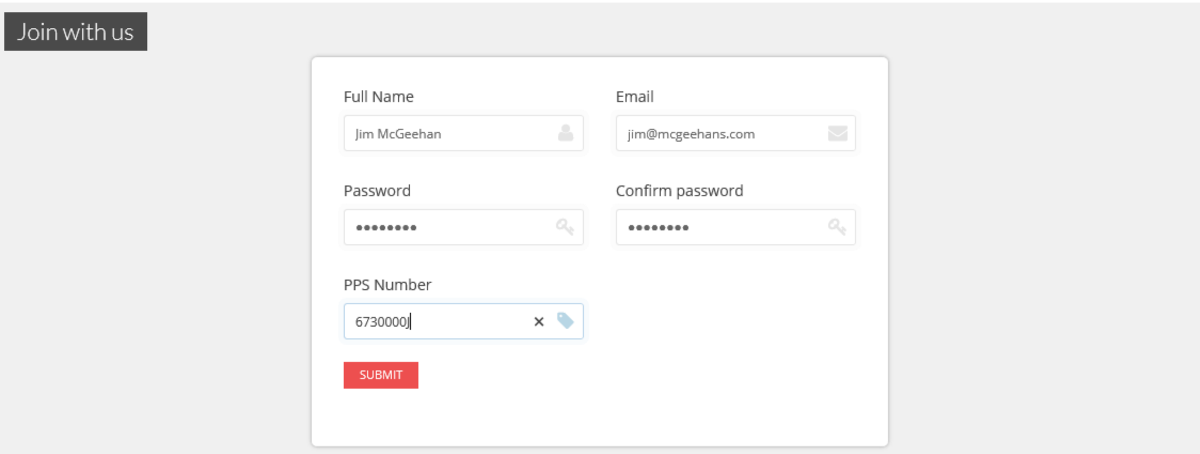
The first step is to sign up, this is very straight forward and requires you to initially fill in 5 fields.



Sign up from the home page or from the menu "Portal" from anywhere on the site



This will take you to the sign up page



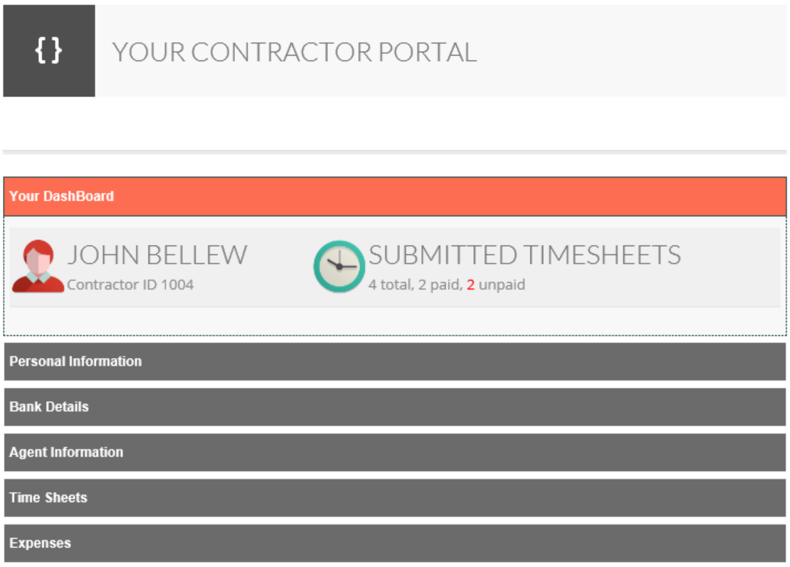
- Enter your full name
- Enter your email address to receive correspondence from the site such as when you are paid
- Choose a password and enter it into the Password field and again in the Confirm password field
- Enter your PPS number

You cannot continue if any of these fields are left blank or if you enter an incorrect email address or if your passwords don't match.

When you click on the Submit button you will be taken to your Portal, you will also receive an email confirming that you have created an account with us.

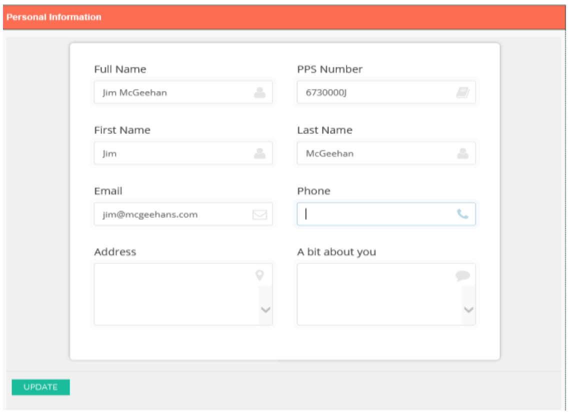
Portal

The first thing you will see on your portal is your dashboard, this gives you quick information about your timesheets, and you will see 0 for everything as you have, at this point, not entered anything. After a while it will begin to look something like this.



Personal Information

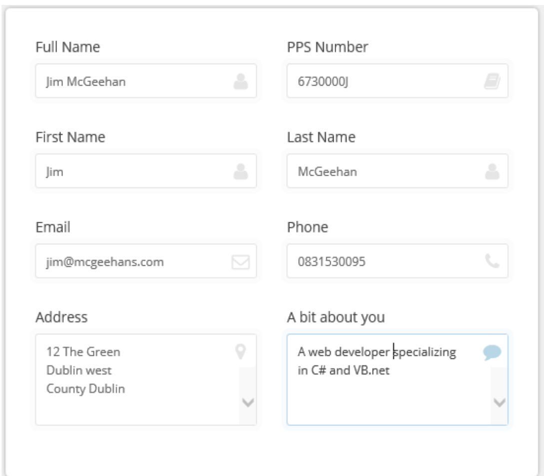
You can fill out some extra personal information by clicking on the **Personal Information** tab



Here is where you can:

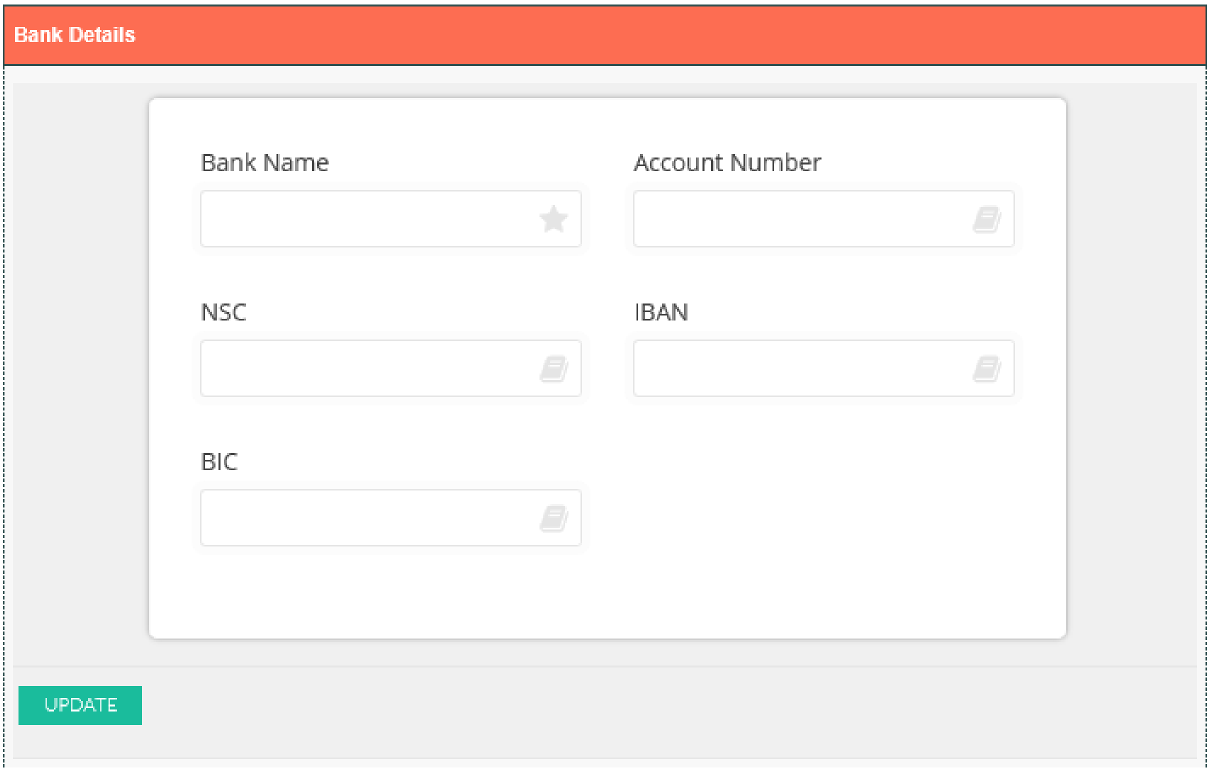
Fill in your phone number.
Fill in your address.
Fill in a short description about you, this will appear on your Profile every time you log in and will assist us while searching for you in our database.

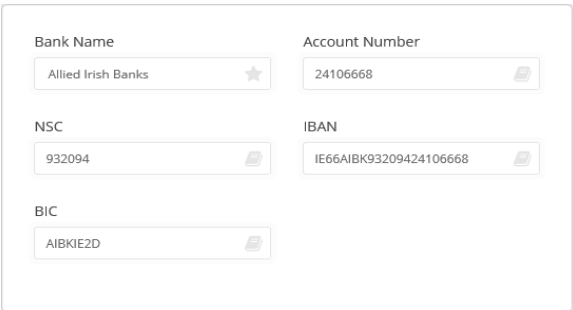
When you are finished, click the Update Button. You should receive a confirmation text letting you know that all went well.



Bank Details

In order to proceed and to get paid into your bank account, you will need to provide us your bank details. You do this by clicking on the **Bank Details** Tab





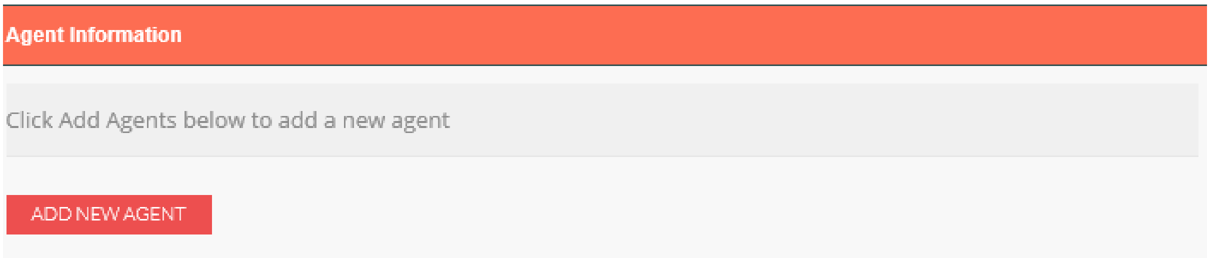
Select your Bank name from the list of available banks.
Enter your account number.
Enter the NSC (National sort code).
Enter the IBAN.
And finally enter the BIC.

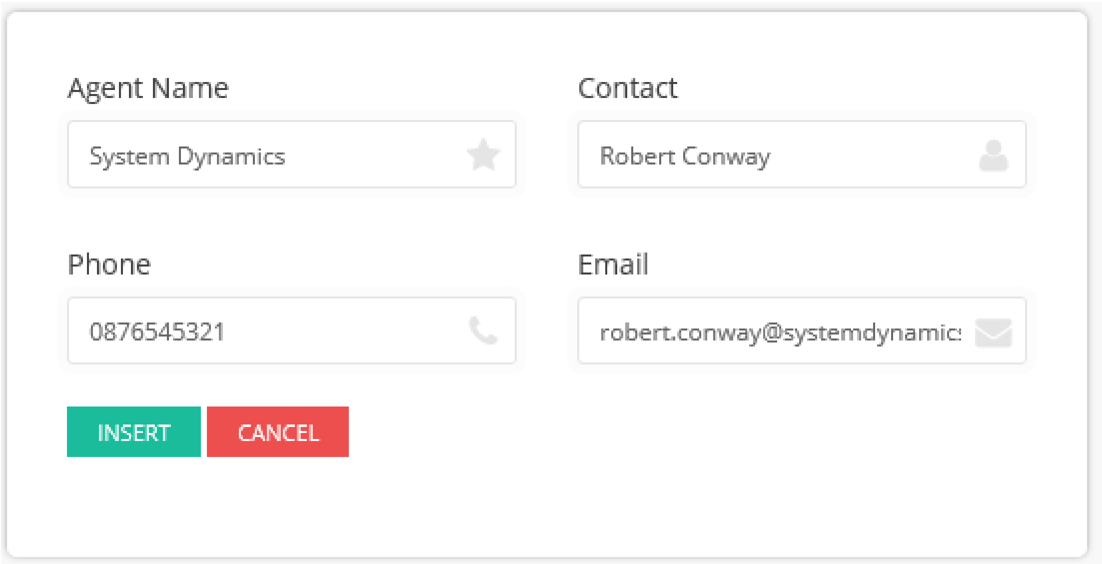
Click on **Update** and you will receive a confirmation notice if everything went well.

Agent Information

You will need to enter your recruit agent information, you can have as many agents as you like.

As this is your first time here, click on the **Add New Agent** button

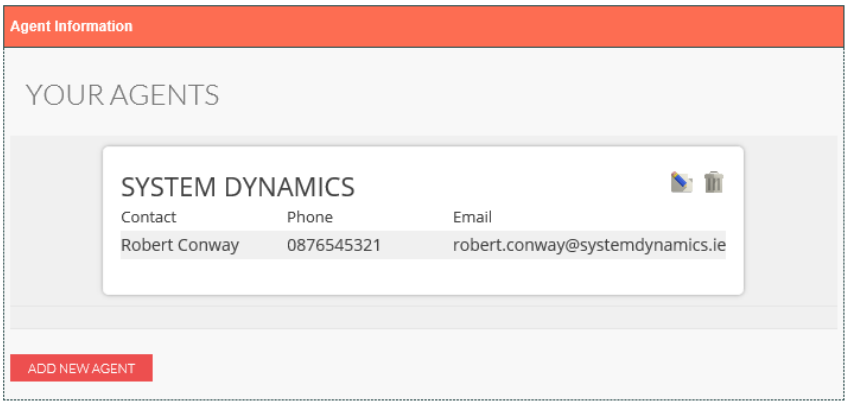




- Enter the Agent Name
- Enter the contact name of who you are dealing with
- Enter the phone number so we can call them if needed
- And most especially enter the email address so we can send them your invoices

Click on the **Insert** button and you should receive a confirmation notification if all went well.

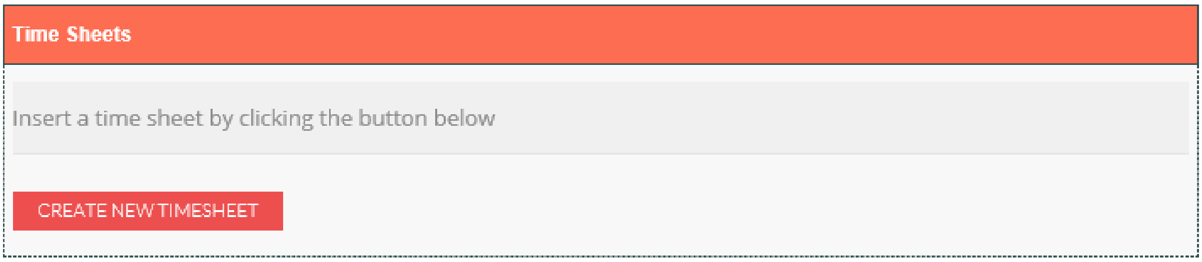
Now your **Agent Information Tab** will look something like this

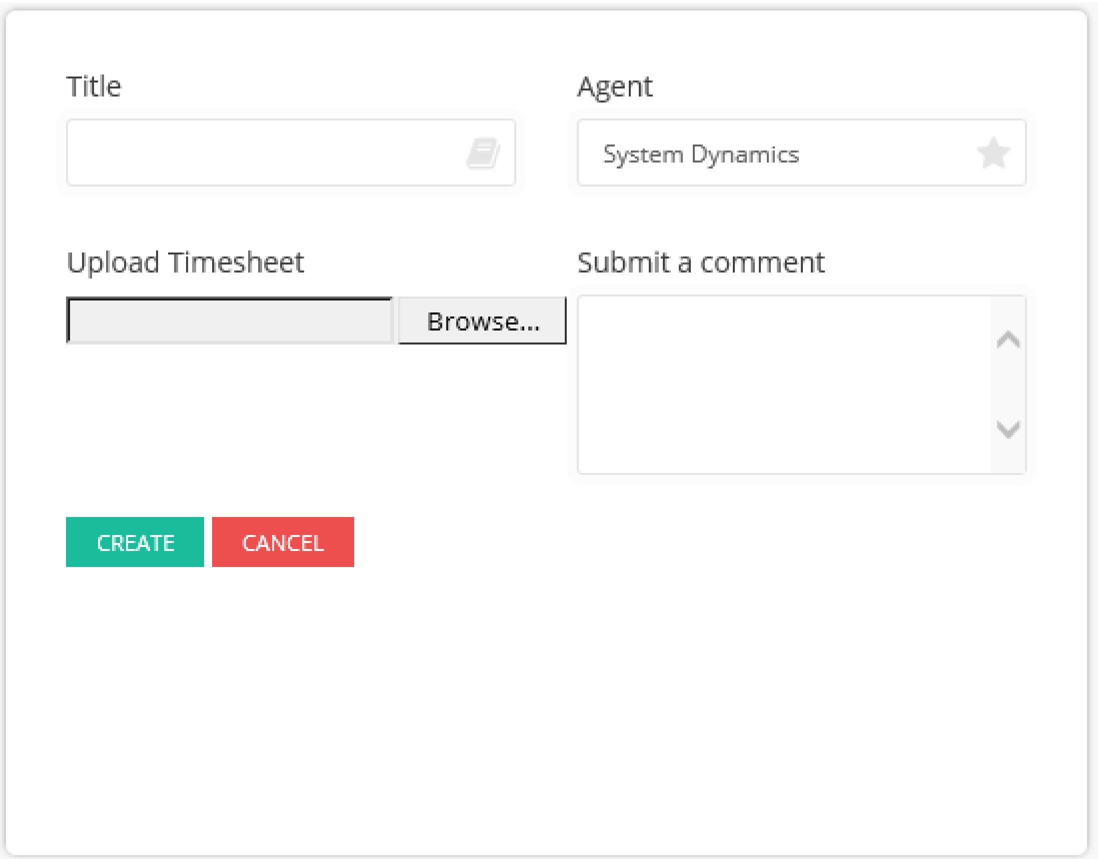


You can edit the Agent, Remove the agent or add a new agent if you wish.

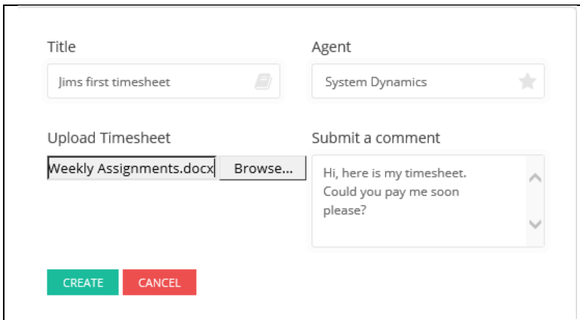
Time Sheets

You can create timesheets when you have entered an agent. As this is your first timesheet you can click on **Create New Timesheet**.





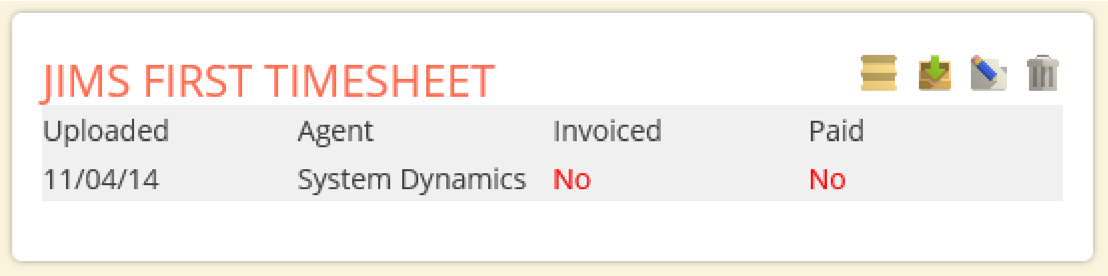
- Enter a title for your time sheet
  Select an Agent if you have more than one, otherwise leave the Agent field as it is.
- Click on Browse to upload your timesheet from your Computer, cloud drive
- Leave us a comment if you wish.

<table>
<tr>
<td>
</td>
<td>When you click the Create Button, we will receive an email prompting us to perform tasks such as

Mark as Received (by us)
Mark as Invoiced to your agent
Mark as Paid to your bank account

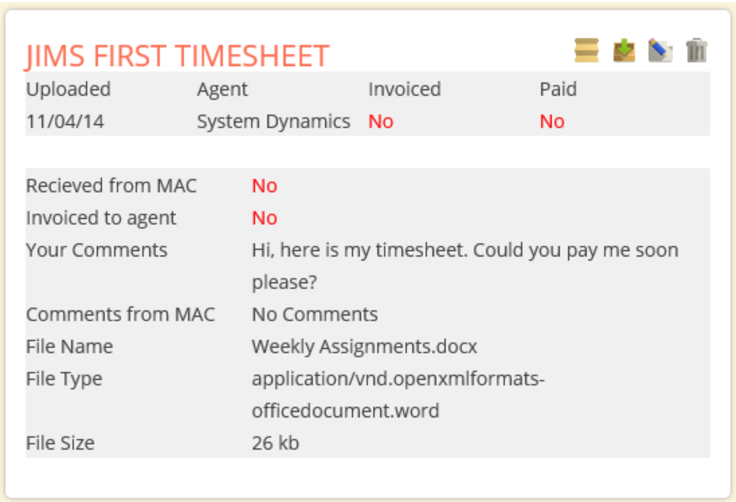
Each time we perform any of these tasks you will receive an email from us.</td>
</tr>
</table>

After you click on **Create**, you will receive a confirmation notification if all went well.
The timesheet now appears in your list of timesheets



You can see at a glance whether it has been invoiced or paid, who the Agent is and when it was uploaded.

By clicking on the Paper icon you will see a lot more information about your timesheet



You can see

- If it is received by us
- If it is invoiced to your agent
- Your comments
- Any comments we might have made
- The file name, its type and size.

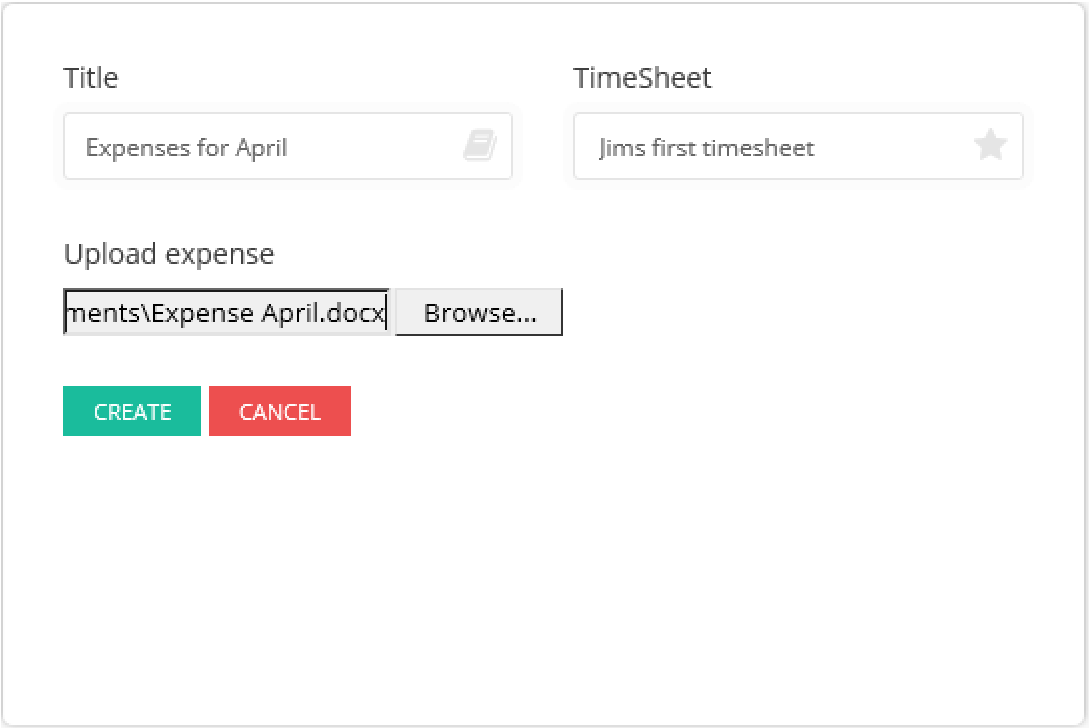
You can do

- You can download this timesheet by clicking on the Download icon.
- You can make small changes to the timesheet such as Title and Agent by clicking on the Edit icon.
- You can also remove this timesheet by clicking on the Remove icon.
- You can download your Payslip (if you are paid) by clicking on the Payslip icon
- You can download your invoice (if it is invoiced) by clicking on the Invoice icon

Expenses

You can submit expenses for each timesheet you create.
You do this by clicking the Expenses tab

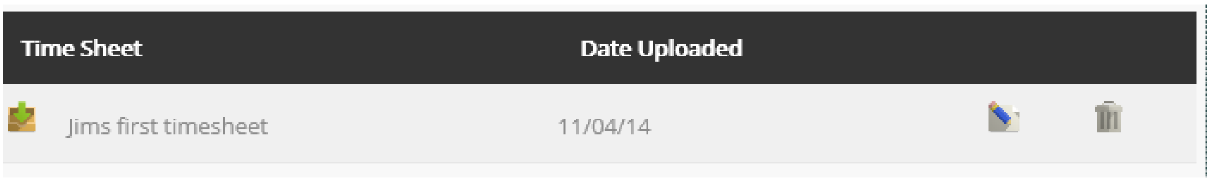
You can create a new expense by clicking on the **Create New Expense** button



- Enter a friendly title for your expense
- Select a timesheet to attach it to.
- Browse your computer, cloud drive etc. for the expense

When you click on **Create** we will receive an email with details about your expense and will review it. It will then reflect on your payslip.

It will now appear in your list of expenses in the Expenses tab, where you can download, modify the title and timesheet it is assigned to or remove it.



We hope you enjoy using your portal just as much as we enjoyed creating it for you.