



Portal Quick Guide for Contractors

Sign up

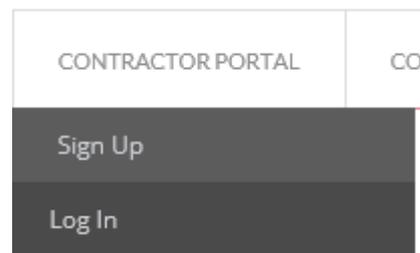
The first step is to sign up, this is very straight forward and requires you to initially fill in 5 fields.

Join with Us

Joining our umbrella company could not be easier.

SIGN UP

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

A screenshot of a sign-up form titled 'Join with us'. The form is white with a light grey border and contains five input fields: 'Full Name' (with 'Jim McGeehan' entered), 'Email' (with 'jim@mcgeehans.com' entered), 'Password' (with masked characters), 'Confirm password' (with masked characters), and 'PPS Number' (with '6730000' entered). A red 'SUBMIT' button is located at the bottom of the form.

- 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.

The image shows two parts of the portal interface. On the left is the 'YOUR CONTRACTOR PORTAL' header with a code icon. Below it is the 'Your Dashboard' section for 'JOHN BELLEW' (Contractor ID 1004). It features a 'SUBMITTED TIMESHEETS' summary showing 4 total, 2 paid, and 2 unpaid. A vertical menu on the right lists: Personal Information, Bank Details, Agent Information, Time Sheets, and Expenses. On the right is a profile card for 'HELLO JOHN!' with a bio: 'A graphics designer, a web developer, a boyfriend, a friend, a son..'

Personal Information

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

The 'Personal Information' form contains the following fields: Full Name (Jim McGeehan), PPS Number (6730000J), First Name (Jim), Last Name (McGeehan), Email (jim@mcgeehans.com), Phone (empty), Address (empty), and A bit about you (empty). An 'UPDATE' button is located at the bottom left.

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.

The 'Personal Information' form is now filled out: Full Name (Jim McGeehan), PPS Number (6730000J), First Name (Jim), Last Name (McGeehan), Email (jim@mcgeehans.com), Phone (0831530095), Address (12 The Green, Dublin west, County Dublin), and A bit about you (A web developer specializing in C# and VB.net).

The profile card now says 'HELLO JIM!' with a bio: 'A web developer specializing in C# and VB.net'

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

Bank Details

Bank Name	Account Number
<input type="text"/>	<input type="text"/>
NSC	IBAN
<input type="text"/>	<input type="text"/>
BIC	
<input type="text"/>	

UPDATE

Bank Name	Account Number
Allied Irish Banks	24106668
NSC	IBAN
932094	IE66AIBK93209424106668
BIC	
AIBKIE2D	

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

Agent Information

Click Add Agents below to add a new agent

ADD NEW AGENT

Agent Name: System Dynamics

Contact: Robert Conway

Phone: 0876545321

Email: robert.conway@systemdynamic...

INSERT CANCEL

- 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

Agent Information

YOUR AGENTS

SYSTEM DYNAMICS

Contact	Phone	Email
Robert Conway	0876545321	robert.conway@systemdynamics.ie

ADD NEW AGENT

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**.

Time Sheets

Insert a time sheet by clicking the button below

CREATE NEW TIMESHEET

Title

Agent

System Dynamics

Upload Timesheet

Browse...

Submit a comment

CREATE CANCEL

- 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.

<div><p>Title</p><p>Jims first timesheet</p><p>Agent</p><p>System Dynamics</p><p>Upload Timesheet</p><p>Weekly Assignments.docx Browse...</p><p>Submit a comment</p><p>Hi, here is my timesheet. Could you pay me soon please?</p><p>CREATE CANCEL</p></div>	<p>When you click the Create Button, we will receive an email prompting us to perform tasks such as</p> <ul style="list-style-type: none">Mark as Received (by us)Mark as Invoiced to your agentMark as Paid to your bank account <p>Each time we perform any of these tasks you will receive an email from us.</p>
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After you click on **Create**, you will receive a confirmation notification if all went well. The timesheet now appears in your list of timesheets

JIMS FIRST TIMESHEET							
Uploaded	Agent	Invoiced	Paid				
11/04/14	System Dynamics	No	No				

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

JIMS FIRST TIMESHEET					
Uploaded	Agent	Invoiced	Paid		
11/04/14	System Dynamics	No	No		
Received from MAC	No				
Invoiced to agent	No				
Your Comments	Hi, here is my timesheet. Could you pay me soon please?				
Comments from MAC	No Comments				
File Name	Weekly Assignments.docx				
File Type	application/vnd.openxmlformats-officedocument.word				
File Size	26 kb				

You can see

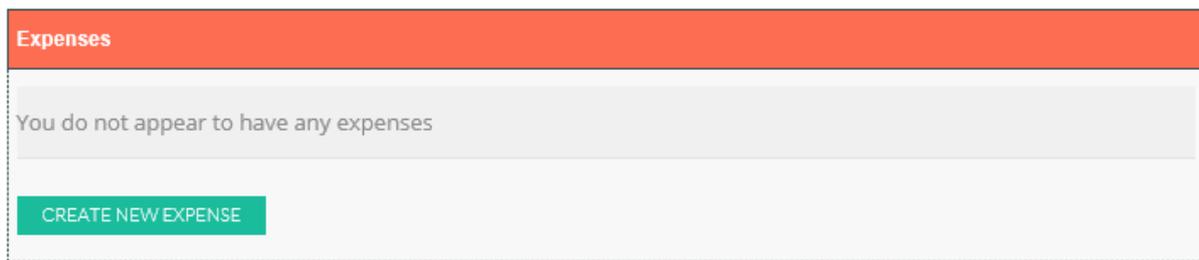
- If it is received by us
- If it is invoiced to your agent
- Your comments
- Any comments we might have made
- The file name, its type and size.

You can do

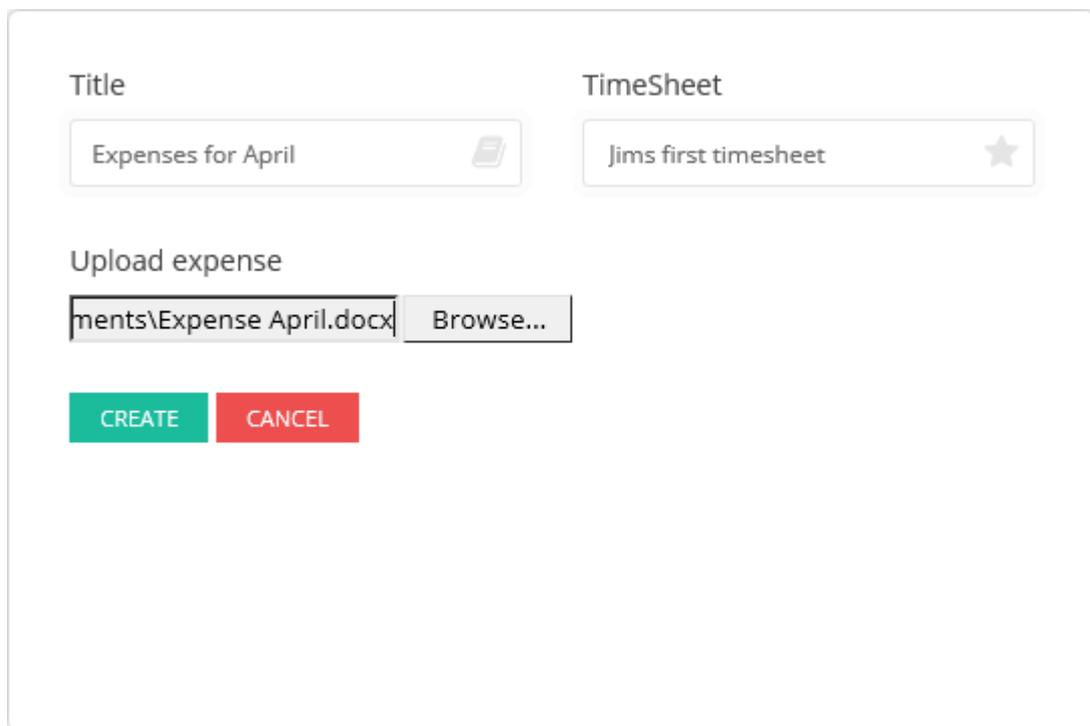
- You can download this timesheet by clicking on the Download icon. 
- You can make small changes to the timesheet such as Title and Agent by clicking on the Edit icon. 
- You can also remove this timesheet by clicking on the Remove icon. 
- You can download your Payslip (if you are paid) by clicking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



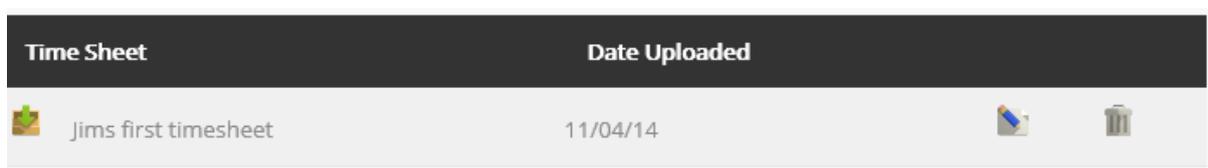
You can create a new expense by clicking on the **Create New Expense** button

A screenshot of a form for creating a new expense. The form has two columns: 'Title' and 'TimeSheet'. The 'Title' field contains 'Expenses for April' and has a document icon. The 'TimeSheet' field contains 'Jims first timesheet' and has a star icon. Below these fields is the 'Upload expense' section, which includes a text input field containing 'ments\Expense April.docx' and a 'Browse...' button. At the bottom of the form are two buttons: 'CREATE' (green) and 'CANCEL' (red).

- 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.

A screenshot of a table showing a list of expenses. The table has two columns: 'Time Sheet' and 'Date Uploaded'. The first row contains the following data: 'jims first timesheet' under 'Time Sheet' and '11/04/14' under 'Date Uploaded'. To the right of the text in the first row are two icons: a document icon and a trash can icon.

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