

Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

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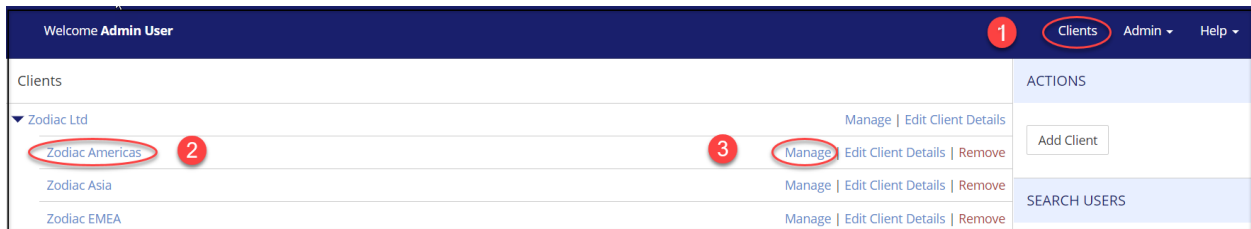
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CONFIGURATION

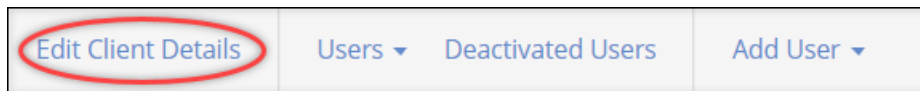
The configuration options are listed under Edit Client Details.

To find the options

1. Select Client.
2. Select the parent company/subsidiary unit you wish to configure.
3. Select Manage.



4. Select 'Edit Client Details' from the navigation bar.



5. Select the application option from the drop-down list, on the right of the screen.



4.01 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'.

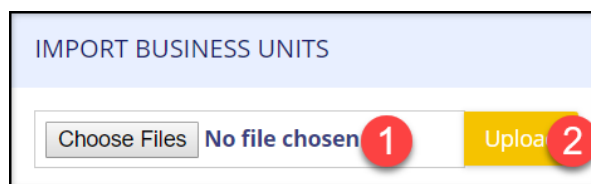
BUSINESS UNITS
BUSINESS UNIT
<i>No business units found</i>

To change the business units, use the Business Unit Template. Templates are located under the Help tab, 'Upload Templates'.

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.



4.02 Case Types

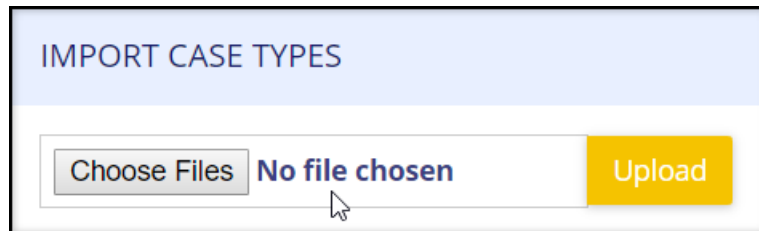
To manage Case Types, select Case Types from the drop-down options. The case types currently available will display on the screen or a message confirming 'No case Types Found'.

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

To change the case types, use the Case Type Template. Templates are located under the Help tab, 'Upload Templates'. 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
Permanent Establishment Rule
Social Security Certificate
Tax Registration Process
Tax Return
Visa Production
Withholding Process Request
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

4.03 Cost Centres

To manage Cost Centres, select Cost Centres from the drop-down options. The cost centres currently available will display on the screen.

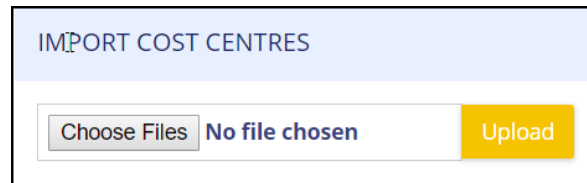
COST CENTRES
COST CENTRE
ABC123
ABC456
ABC789

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. Templates are located under the Help tab, 'Upload Templates'.

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



4.04 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. If per diem Rules rules have not been uploaded, wording will display 'No per diem rules found'.

To change the per diems, use Per Diem Template. Templates are located under the Help tab, 'Upload Templates'.

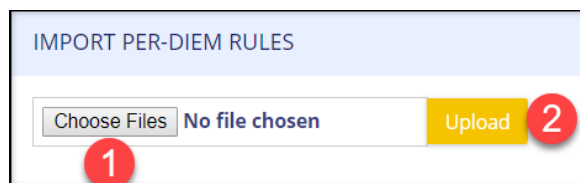
The template columns are shown below.

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

Email	City	State	Country	Meals	Lodging	Governmente	Governmente	Effective Date
test@exar	London		United Kin	100	0	50	0	9/3/2018
	Bristol		United Kin	120		50	50	9/3/2018
	Dublin		Ireland	80		50	50	9/3/2018
	New York	New York	United Sta	500	50	50		9/3/2018
	Sydney		Australia	200		50	50	9/3/2018
	Chengdu	Sichuan	China	70		50	50	9/3/2018
	Tokyo		Japan	50		50	50	9/3/2018
	Berlin		Germany	80		50	50	9/3/2018
	Paris		France	90		50	50	9/3/2018
	Lyon		France	40		50	50	9/3/2018
	DEFAULT	DEFAULT	DEFAULT	200		50	0	9/3/2018

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.



4.05 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

To change pre-trip recipients, use the Pre-Trip Recipient Template. Templates are located under the Help tab, 'Upload Templates'. The template columns are shown below.

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

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

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

IMPORT PRE-TRIP RECIPIENTS

Choose Files No file chosen Upload

4.06 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. If projects and activities have not been uploaded, wording will display 'No projects and activities found'

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

To change the projects and activities, use the Activities Template. Templates are located under the Help tab, 'Upload Templates'. 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.

