CLIENT PORTAL

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1. Purpose:

The Client Portal (WebCenter) gives you, the client contact, access to important information including invoices, reporting, and employee lists from CGS.

2. Prerequisites

You <u>must</u> be authorized and listed as a contact for the Company and have a company email address to access CGS's Client Portal. lease have an authorized representative from the Company contact CGS to have you added.

3. Setting up your Client Portal Account

Existing client contacts must receive an invitation from CGS to set up your login information to access CGS's Client Portal. *Log in credentials must be created for each authorized client contact.*

3.1. Request Access to Client Portal

Complete the Request Online Access form <u>here</u> to request an invite be sent to you.

REQUEST ACCESS, OR NEED HELP?

Name*

Email*

Your Message*

[🖱 Send]

3.2. Client Contact Portal Invite

1. Click the link in the invitation and follow the steps to create your account.
   - Create a username
   - Create a password

##ContactName##

You have been invited to use Client Portal functionality for ##CustomerName##. CGS's Client Portal is your online resource for information regarding ##CustomerName##, and may be used to communicate with CGS.

Before being able to use your Client Portal, you will first need to register by navigating to the link below.

To continue setting up an account, click here.

To unsubscribe from this notification, please click here.

Thank you,

CGS

4. Navigating Client Portal

Keep in mind that you may not be able to see all the options available as Client Portal may be limited by your role.

- ✓ Client: The Home Tab
- ✓ Client: The Orders Tabs
- ✓ Client: The Employees Tab
- ✓ Client: The TimeCards Tab
- ✓ Client: The Reports Tab
- ✓ Client: The Documents Tab
- ✓ Client: The TimeClock Tab
- ✓ Client: How to Reset Your Password

4.1. Client: Home Tab

Gives the client contact(s) access to important information including orders, invoices, and reporting options. You may also review and approve the time for your employees.

☞ **Your To Do List:** this section represents items that need your attention such as action items or items requiring your review.

- – **My Information**: update your e-mail address, change your password, etc.
  - ▪ **Notifications**: update the notifications you would like to receive.

☞ **Messages:**

This is a general message board your staffing specialist/agency might use to post useful reminders.
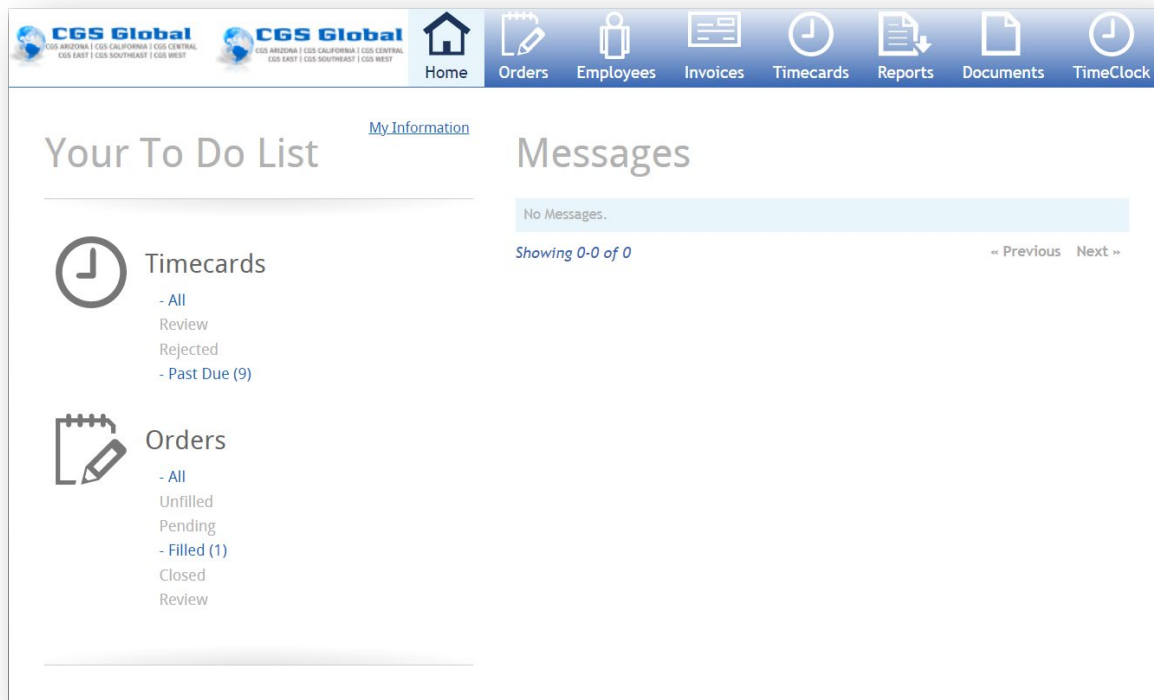
4.2.   Client: Orders Tab

Create New Orders to request people for your job.

View existing orders, staffing status, and details, such as:

– **Labor**:   job information specific to the order
– **Description**: summary of the job information, if provided
– **Contacts**: contacts for the job and role
– **Assignments**: field employees assigned to the order
– **Reviewers**: company contacts who review the order, if applicable
– **Skills**: skills required for the order, if provided/available

4.3. Client: Employees tab

View a list of employees on a particular order, including their assignment, timecard, and their skills.

4.4.   Client: Invoices Tab

View invoices, details of an invoice, & print your invoices.

– Select an invoice and the pencil icon to view details about that particular invoice.

4.5.   Client: TimeCards Tab

Manage, Review, & Submit employee TimeCards.

Approve/Reject Timecards from the review Tab (timecards must be submitted by employee and/or client before they will be available before they can be approved.

4.6. Client: Reports Tab

Access, view, and print your paychecks.

4.7. Client: Documents Tab
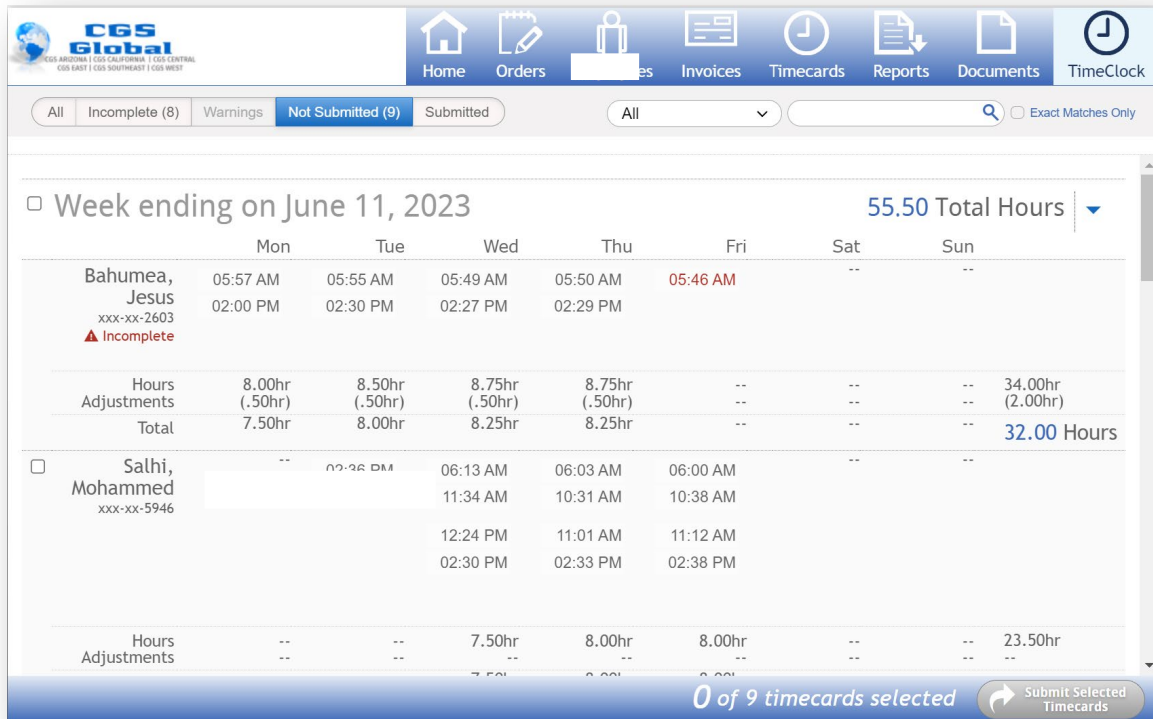
Can view CGS Documents or forms that a client may need.
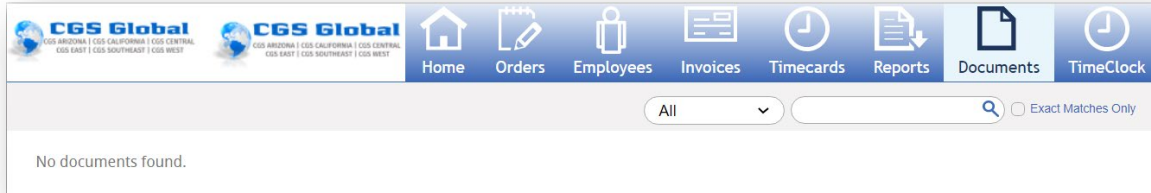
4.8. Client: TimeClock Tab

Used when you elect to use time clock, and the mobile app for users to punch in/out for work.

4.9. Client: How to Reset Your Password

Click - *Forgot password* – to have an email sent to reset your password. You can also contact CGS if you need assistance.

5. TempWorks Knowledge Base

✓ Cient: Employee Portal WebCenter

6. Version History

Version History			
Version	**Changes	Approvals** (Indicate section numbers)	**Name**	**Date**
2023.0	Created	Scheibel	4/14/2023
2023.1	Added Timecard Approval section	Scheibel	10/17/2023