

PARiM Client Access App Guide for Superadmins

Helping you to get the most out of PARiM

Your PARiM Team



Introduction

PARiM client portal, offering both web and mobile apps, was developed to improve communication between you and your clients. PARiM Client Access App ensures that your clients see shift information as well as all shift updates and changes.

In this guide, we provide you with a few steps to easily start off with PARiM Client Access App.

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1. How to share access to the client app

Please share the download links with your client reps:

• For Android phones:

https://play.google.com/store/apps/details?id=uk.co.parim.app

• For iPhones, iOS:

https://apps.apple.com/us/app/parim/id903349917

Please also share the link to the Client Access App guide to lead your client reps through app basics:

http://bitly.ws/AQwh

2. En/disabling access to Client Access App and timesheets approval for client representatives

If you want your client reps to have access to Client portal so they can see timesheets, then you can share access with them in
System settings

For this, turn ON the toggle-switch 'Show Timesheets In Client Portal'.

If you need client reps' approval for timesheets, proceed to the next toggle-switch 'Client representative can approve Timesheets on mobile app' and turn it ON by switching it to green.

3. Default in-app settings for client representatives *available if Event module is activated

If you enabled access for clients to Client portal in the previous stage by turning on setting 'Show Timesheets In Client Portal', then the following settings will be automatically enabled.



Alternatively, if the setting '**Show Timesheets In Client Portal**' is turned **OFF**, then the following settings will be automatically disabled.

You can check these settings if you go to: System settings > Notifications > column IN-APP

Notify "Client" of any activity concerning their requests

Client-requested event approved by admin

4. Set and review the information displayed to customers

To set or review the settings for your client reps, go to **System settings Client settings**

In this section, you can set and review what information is displayed to your clients in Client Portal Web and Client Access App.

5. Client reps' approvals indicator in Client Portal, Web

You can find clients reps' approval indicator on the following pages:

- Timesheets List
- Timesheets Table + list view
- Pay Run
- Invoicing Report

For example, if you have enabled client reps' approval for timesheets, then when you go to **Timesheets list**, you can find statuses for client reps' approval next to a person's name.





A grey tick indicates that a timesheet has NOT been approved.

A green tick indicates that a timesheet has been approved.

You can also use Timesheets approval filtering to find approved & unapproved timesheets by your client reps:

To find all timesheets that require client reps' approval, click 'Yes by Client':



To find all timesheets that have been approved and DON'T require client reps approval, click '**Not by Client**':





5.1. Client reps' approvals indicator on other pages

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Client reps' approvals indicator in Timesheets Table:

Client reps' approvals indicator in **Timesheets Table, list view**:

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Client reps' approvals indicator in Pay Run:

Client reps' approvals indicator in Invoicing Report:

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Both on Pay Run and Invoicing Report pages, you can use filtering 'Yes by Client' and 'No by Client' to find needed shifts faster.

Important! If you have disabled client reps' approval for timesheets, then the client approvals indicators as well as client filtering for clients will not be displayed on the mentioned-above pages.



6. Timesheets approval section in Mobile App

You can find a timesheets approvals section in Timesheets, when they are already approved (on the left) and unapproved (on the right).

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Position Shift Manager 🖗 Location
Location Tartu Rebase > (S) Time
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Break 1h (S Hours work
WORK INFO DClock histor
Hours worked 07:00-17:00 Total hours
Break 1h COMMENTS
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Total hours worked 9h
APPROVAL Assignee
Assignee Approved O
I Client Approved O
Supervisor (you) Approved O PAY
PAY É. Rate
Rate £10.00
7 Total pay £90.00

Important! You, as an admin or superadmin, will see all approval statuses. Your staff users will see only Supervisor and Assignee approval statuses. Your client reps will see only Your (Supplier) and Client approval statuses.

7. Enabling Two-factor authentication (2FA) in mobile apps

It is possible to enable 2FA using both Web and mobile apps for admins and staff. You can find '**Two-factor authentication**' under '**More**' tab.



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Absences >	
Availability >	
Pay > Availability	
Contacts >	
Settings > Contacts	
Two-factor authentication	
Support > Settings	
Resynchronise with PARiM	ication
Last full sync: 3 Jan 13:26 ? Support	
Log out	

If the system setting "Allow two-factor authentication over SMS" is ON, then a user has the option to enable 2FA with the code generator app and by SMS - screenshot on the left below.

If the system setting "Allow two-factor authentication over SMS" is OFF, then a user has the option to enable 2FA with the code generator app only, the same way as it works in the web - screenshot on the right below.

Two-factor authentication	
\times $% \left({{\rm Two-factor\ authentication\ is\ not\ enabled\ for\ your\ account\ }} \right)$	Two-factor authentication
Enabling it will make your account more secure and if somebody finds out your password, they will not be able to log in without a special one-time code.	Enabling two-factor authentication will make your account more secure and if somebody finds out your password, they will not be able to log in without a special one-time code.
Enable with a code generator app	Enable with a code generator app
Enable by receiving an SMS	Enable by receiving an SMS
© ≡ Schedule Time clock More	Cancel



If the system setting "**Allow two-factor authentication over SMS**" is **OFF**, then a user (admin or staff member) has the option to enable 2FA with the code generator app only, the same way as it works in the web.



If 2FA is enabled then you as an admin or your staff sees it as enabled.





To disable 2FA in the mobile app, click '**Disable by receiving SMS**' button on Android or click the toggle on iOS (iPhone).

Important! 2FA can still be disabled by a Superadmin in the web app by going to a user's profile in case a user has deleted the code generator key or due to other reasons.

8. Additional help and links

1. A help article on Client Access App can be found <u>here</u>.

2. The guide for your clients can be downloaded <u>here</u>. Please share it with your clients.

3. You can always reach out to our Support team via email **support@parim.co** or chat bubble in PARiM system.