



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.



Content

1. How to share access to Client Access App -----	p. 3
2. Enabling in-app notifications for client reps -----	p. 3
3. En/disabling timesheets approval for client representatives -----	p. 3-4
4. Set and review the information displayed to customers -----	p. 4
5. Client reps' approvals indicator in Client Portal, Web -----	p. 5-6
5.1. Client reps' approvals indicator on other pages -----	p. 6-7
6. Timesheets approval section in Mobile App -----	p. 8
7. Enabling Two-factor authentication (2FA) in mobile apps -----	p. 8-11
8. Additional help and links -----	p. 11

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 → **Time & Attendance** or **Client 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.

<input type="checkbox"/>	Person ▾		Day	Date
<input type="checkbox"/>	Juliet Smith	<div style="background-color: black; color: white; padding: 2px; display: inline-block;">Awaiting approval by client representative</div>     	Mon	06 Feb

- ✔ 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**':

Timesheets Approval

Yes by Supervisor 15	Not by Supervisor 318
→ Yes by Client ← 5	Not by Client 328
Yes by Assignee 6	Not by Assignee 327

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

Timesheets Approval

Yes by Supervisor 15	Not by Supervisor 318
Yes by Client 5	→ Not by Client ← 328
Yes by Assignee 6	Not by Assignee 327

5.1. Client reps' approvals indicator on other pages

Client reps' approvals indicator in **Timesheets Table**:

Weekly Timesheet

Starting on: 6th February 2023 Ending on: 12th February 2023

▲ (92) Awaiting approval from an assignee ● (77) Awaiting approval from a client representative ◆ (55) Awaiting approval from a supervisor ■ (0) Just Completed

Week: 06	Monday, 6 th			Tuesday, 7 th			Wednesday, 8 th			Thursday, 9 th			Friday, 10 th			Saturday, 11 th			Sunday, 12 th			Total	
	Name	Start	End	HR	Start	End	HR	Start	End	HR	Start	End	HR	Start	End	HR	Start	End	HR	Start	End		HR
Aaron Adams	08:30	17:45	9.25	08:30	16:45	8.25							15:45	15:45	0.00				08:30	16:45	8.25	25.75	Confirm
Abbie Adams	04:00	09:00	5.00										10:15	17:00	5.75	07:00	15:00	8.00				18.75	Confirm

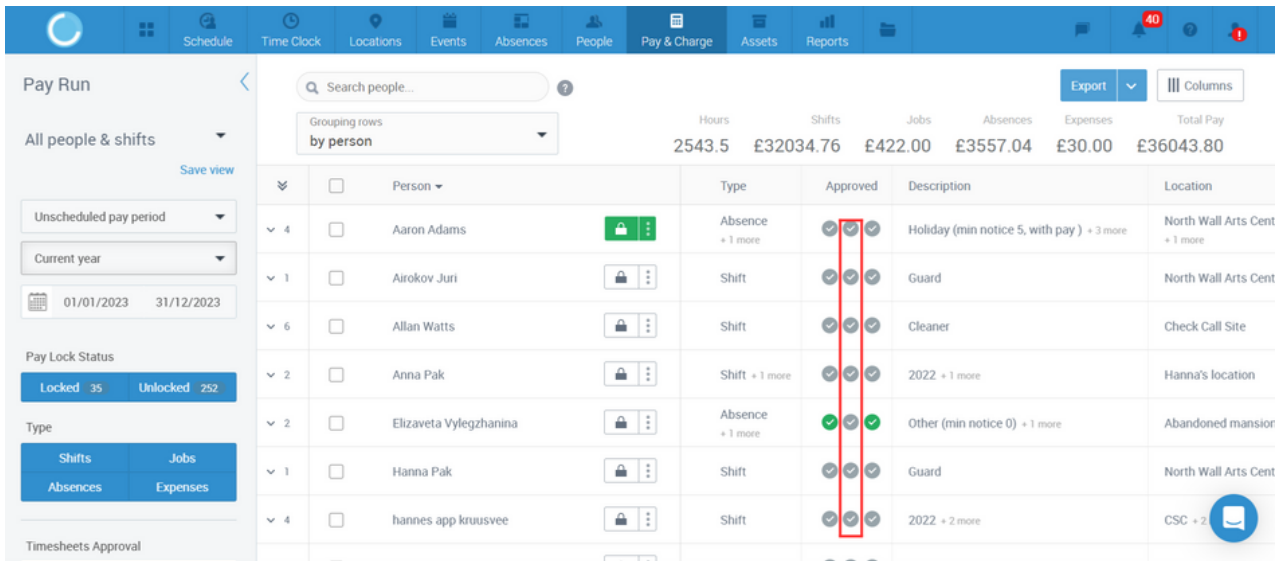
Client reps' approvals indicator in **Timesheets Table, list view**:

TIMESHEETS

Approve

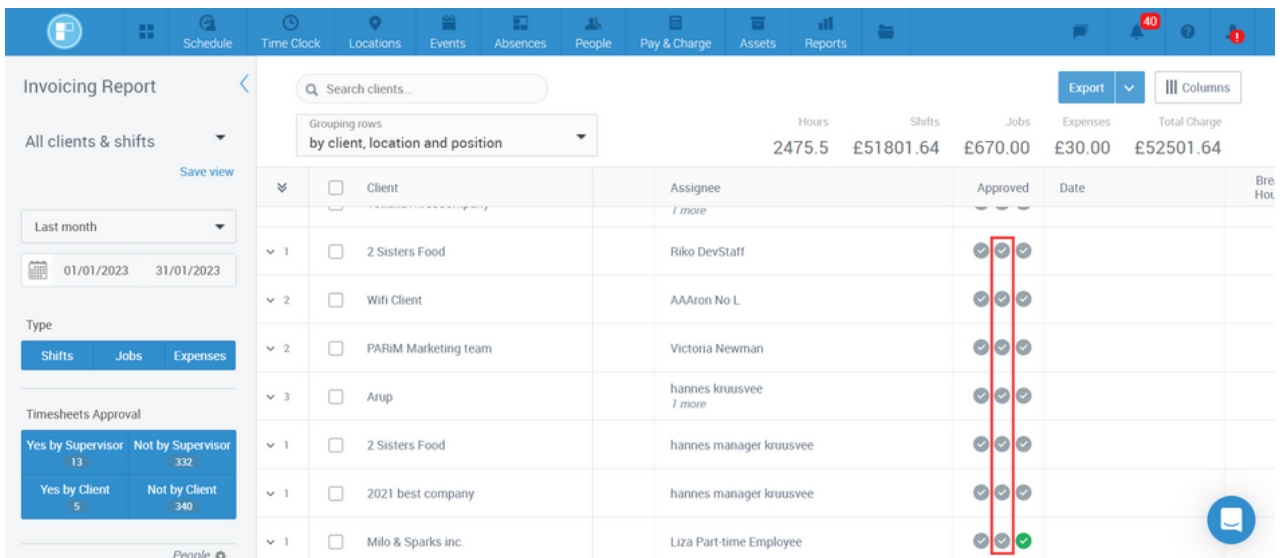
DATE	TIME	BILLABLE HOURS	PHOTO	PERSON'S NAME	CLIENT	LOCATION	POSITION	APPROVED BY ASSIGNEE	APPROVED BY CLIENT	APPROVED BY SUPERVISOR
15 Feb	10:00 - 13:45	3.75 (0.00)	IP	[Blurred]	[Blurred]	[Blurred]	EB5	✓	✓	✓
14 Feb	09:00 - 17:30	7.50 (1.00)	[Blurred]	[Blurred]	[Blurred]	[Blurred]	Wifi1	✓	✓	✓
14 Feb	09:00 - 17:30	7.50 (1.00)	IP	[Blurred]	[Blurred]	[Blurred]	Wifi1	✓	✓	✓

Client reps' approvals indicator in **Pay Run**:



Pay Run		Search people...	Export	Columns
All people & shifts		Grouping rows by person	Hours: 2543.5	Shifts: £32034.76
Unscheduled pay period: Current year 01/01/2023 - 31/12/2023 Pay Lock Status: Locked 35, Unlocked 252 Type: Shifts, Jobs, Absences, Expenses Timesheets Approval		Person	Jobs: £422.00	Absences: £3557.04
			Expenses: £30.00	Total Pay: £36043.80
Person	Type	Approved	Description	Location
Aaron Adams	Absence + 1 more	✓ ✓ ✓	Holiday (min notice 5, with pay) + 3 more	North Wall Arts Cent + 1 more
Airokov Juri	Shift	✓ ✓ ✓	Guard	North Wall Arts Cent
Allan Watts	Shift	✓ ✓ ✓	Cleaner	Check Call Site
Anna Pak	Shift + 1 more	✓ ✓ ✓	2022 + 1 more	Hanna's location
Elizaveta Vylegzhanina	Absence + 1 more	✓ ✓ ✓	Other (min notice 0) + 1 more	Abandoned mansion
Hanna Pak	Shift	✓ ✓ ✓	Guard	North Wall Arts Cent
hannes app kruusvee	Shift	✓ ✓ ✓	2022 + 2 more	CSC + 2

Client reps' approvals indicator in **Invoicing Report**:



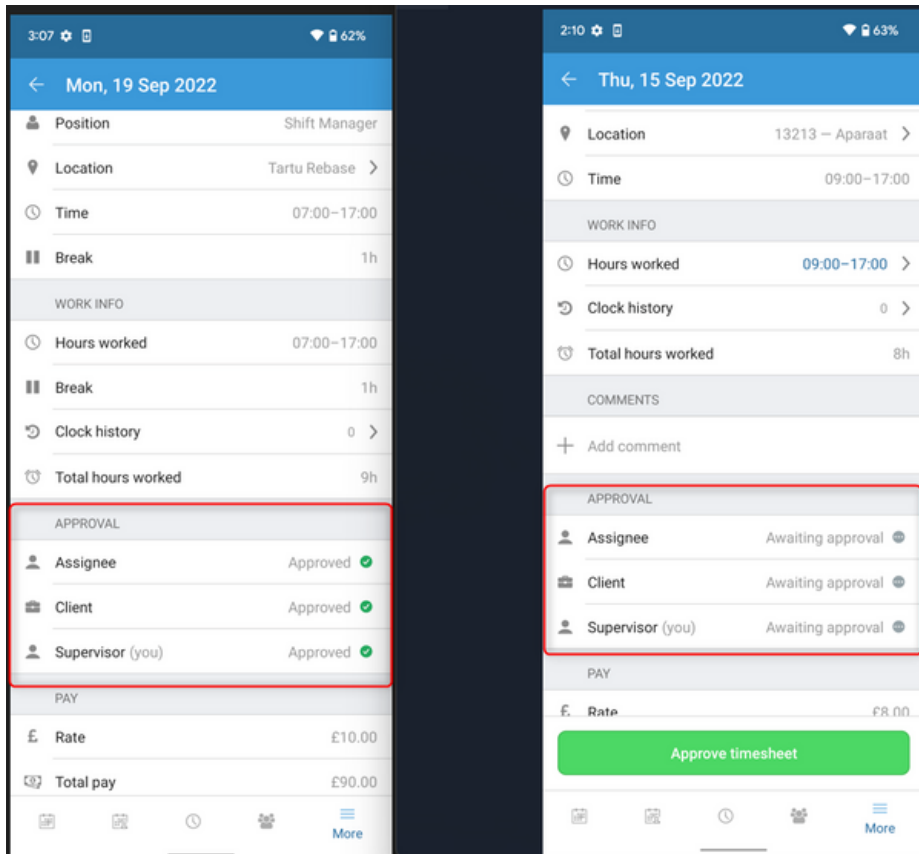
Invoicing Report		Search clients...	Export	Columns
All clients & shifts		Grouping rows by client, location and position	Hours: 2475.5	Shifts: £51801.64
Last month 01/01/2023 - 31/01/2023 Type: Shifts, Jobs, Expenses Timesheets Approval: Yes by Supervisor 13, Not by Supervisor 332, Yes by Client 5, Not by Client 340		Client	Jobs: £670.00	Expenses: £30.00
			Total Charge: £52501.64	
Client	Assignee	Approved	Date	Bre Hoc
2 Sisters Food	Riko DevStaff	✓ ✓ ✓		
Wifi Client	AAaron No L	✓ ✓ ✓		
PARiM Marketing team	Victoria Newman	✓ ✓ ✓		
Arup	hannes kruusvee + 1 more	✓ ✓ ✓		
2 Sisters Food	hannes manager kruusvee	✓ ✓ ✓		
2021 best company	hannes manager kruusvee	✓ ✓ ✓		
Milo & Sparks inc.	Liza Part-time Employee	✓ ✓ ✓		

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

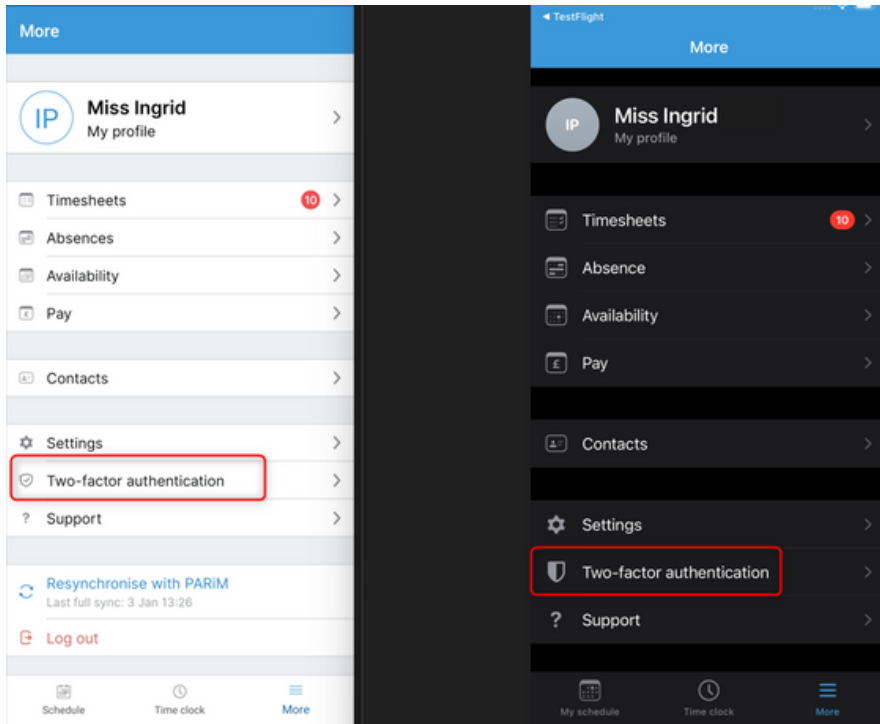
You can find a timesheets approvals section in Timesheets, when they are already approved (on the left) and unapproved (on the right).



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.

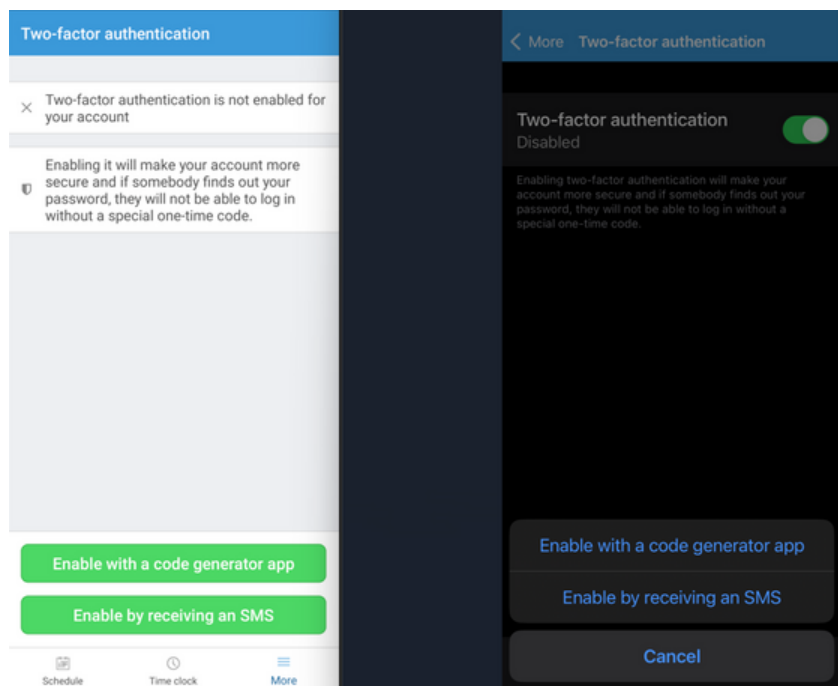
7. Enabling Two-factor authentication (2FA) in mobile apps

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.

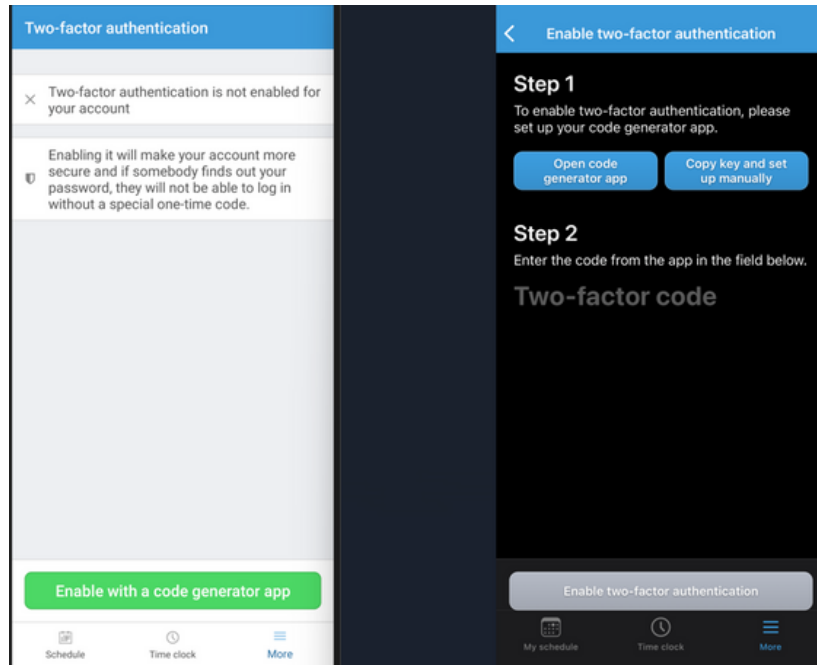


If the system setting “**Allow two-factor authentication over SMS**” is **ON**, then a user has the option to enable 2FA with the code generator app and by SMS - screenshot on the left below.

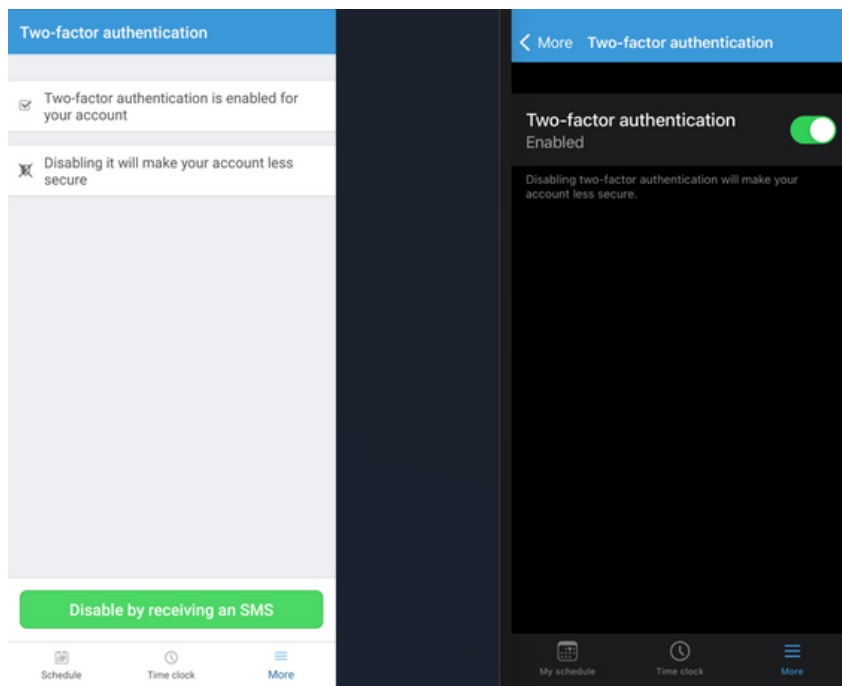
If the system setting “**Allow two-factor authentication over SMS**” is **OFF**, then a user has the option to enable 2FA with the code generator app only, the same way as it works in the web - screenshot on the right below.



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 [here](#).
2. The guide for your clients can be downloaded [here](#). 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.