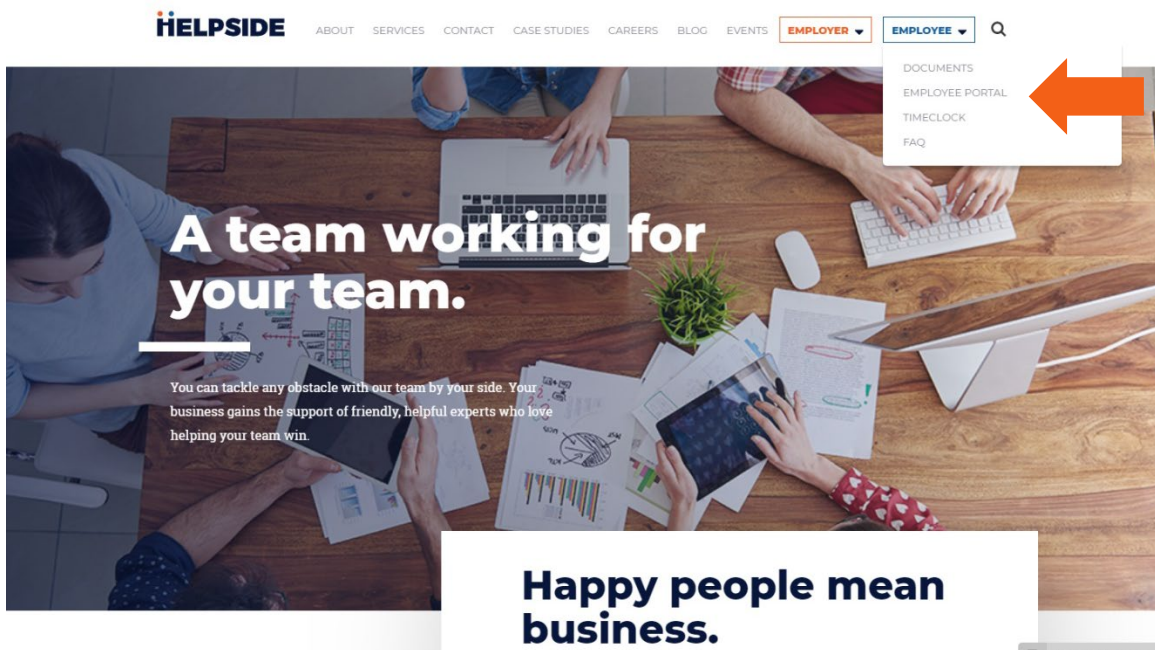


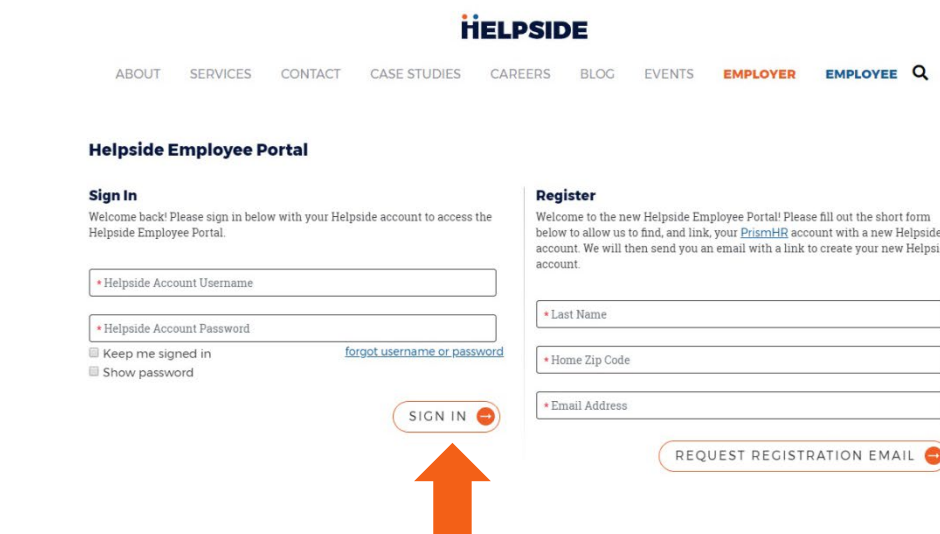
The Helpside Company Portal allows clients to upload documents including employee handbooks for employees to view and sign. It also allows clients to include custom links and important messages and announcements in the Helpside Employee Portal dashboard. You can choose which of your employees have access to the Company Portal tools.

Go to: [helpside.com](https://helpside.com)

Click on **Employee** and then **Employee Portal**.



Enter your username and your password and click **Sign In**.



After logging into the Employee Portal, you will find a menu option on the left-hand side of the screen that says Company Portal. This is where you will find the Company Communications

- Company Portal ▾
  - Company Settings
  - Company Communications**
  - Document Management
  - Announcements / Messages
  - Company Links



**Document Management** allows you to upload new documents for your employees to view and sign electronically. You have two options for uploading documents: Employee Handbook or Employee Documents. Employee Handbooks are used in the employee onboarding process, so they are uploaded separately from other documents.

## Document Management

Uploaded documents will appear on the dashboard. Employee handbooks are loaded separately because of their use in the onboarding process.

### Upload Employee Handbook

ADD NEW EMPLOYEE HANDBOOK →

### Upload Other Documents

ADD OTHER DOCUMENT →

When you add a new document or handbook, you will have the option to require employee signatures for all employees or just those employees you select. If you choose not to require any signatures, a link to the document will display on the employee dashboard.

## Upload Employee Handbook

Choose File No file chosen

\* File Name Display

Require Signatures

Yes

Require Signatures

Require All Employees

CLOSE

SUBMIT →

If you add a new document that is not an employee handbook, you will have the option to select one of the already uploaded documents to be replaced. Whenever you replace an existing document, we add a new version of that document but will keep the past versions of the document as long as a signature was required.

If you add a new employee handbook, it will automatically replace the existing employee handbook, if applicable.

You are also able to manage the documents and view all employee signatures in the Document Management section of the portal.

### Upload Other Document

No file chosen

\* File Name Display

Is this document replacing an existing document?

Yes

\* Document to be Replaced

Helpside is Working

Require Signatures

No

### Documents

Document Name	
Helpside2018Handbook-Final.pdf	<ul style="list-style-type: none"><li><a href="#">view document</a></li><li><a href="#">edit</a></li><li><a href="#">delete</a></li><li><a href="#">archive</a></li></ul>

### Documents with Signatures Required

Document Name	
Helpside is Working (employee handbook)	<ul style="list-style-type: none"><li><a href="#">view document</a></li><li><a href="#">view all signatures</a></li><li><a href="#">edit</a></li><li><a href="#">delete</a></li><li><a href="#">archive</a></li></ul>

Employees will see an Outstanding Task notification on their dashboard when there is a new document for them to view and sign.



### Outstanding Tasks

Document Name	
Helpside is Working	<a href="#">view and sign</a>

By clicking on **Announcements/Messages** you can add announcements and messages that your employees will see on the dashboard each time they login to the Helpside Employee Portal.

Simply login to the Helpside Portal. Under Company Portal and then Company Communications choose Announcements/Messages to add or edit.

Date Start	Date End	Subject	Message Body	Priority	
10/12/2020		Test Message	This is the best tool ever!	Normal	<ul style="list-style-type: none"><li><a href="#">edit</a></li><li><a href="#">delete</a></li></ul>
10/12/2020		Test Message	This is a test message	High	<ul style="list-style-type: none"><li><a href="#">edit</a></li><li><a href="#">delete</a></li></ul>

**Company Links** allows you to add custom links to your employees' dashboards in the Helpside Portal.

## Company Links

Simply login to the Helpside Portal. Under Company Portal choose Company Links. Then enter in the name of the link and the URL.

Link Title	Link Url	
Helpside	<a href="https://www.helpside.com">https://www.helpside.com</a>	<ul style="list-style-type: none"><li><a href="#">edit</a></li><li><a href="#">delete</a></li></ul>

Employees will see the links each time they login to the Helpside Employee Portal.

Company Links

- [Helpside](#)

If you have any questions about the Company Settings tool, please contact a member of the Client Success team at Helpside at 1-800-748-5102 or [service@helpside.com](mailto:service@helpside.com).