



Visma Enterprise

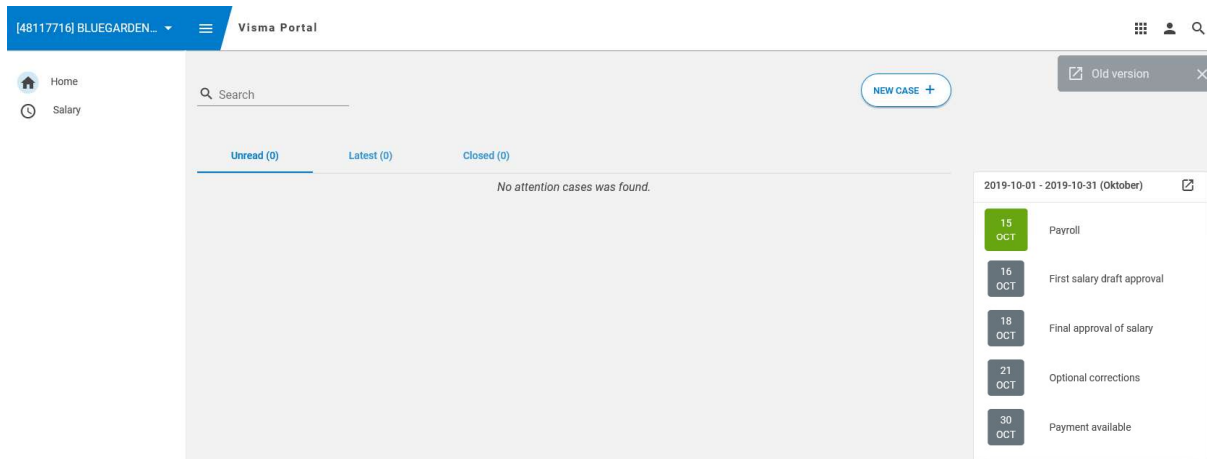
Visma Portal

Guide for customer portal
November 2019

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1. Front page (Home)



When you log-in to Visma Portal, you will enter the front page (Home), where all communication takes place. The cases are divided into Unread, Latest and Closed. Unread are new cases. When you have created a case yourself, this will be put into Latest. The Closed cases are the cases which have been closed by Visma. You will not be able to close a case yourself.

2. New case

You can create a new case on the button; New case

Create case ✕

Title *
This field is required

Category *
Select a category

Message *
Write a message

Upload file
Selected file(s)

You need to write an optional and telling text and select a category. You can select from the below categories. If you select payroll, Employee and Other the case will be sent to the payroll team. If you select reimbursement the case will be sent to the HR & Reimbursement team.

Category

Salary

Reimbursement


Employee

Other

Write the message to the customer and possible attach a file. By using the padlock on the bottom of the page you can, decide, who among your users should be able to view the case. Select all or a single user.

Create case - Access ✕

All can see

 Read access

Lone Levisen ✕


Share this case with other users


3. Search


The search button can be found in the top right corner 

Search

Search in title or message

From 
From: DD-MM-YYYY

To 
To: DD-MM-YYYY

Category 
Select a category


Search from archive

You can search for the below

- Subject of the case and the text within the case
- Time interval
- Category of the cases
- And for any closed cases





4. Salary



On the right side of the page your payroll deadlines for the current payroll are shown. This can be for both 14-days paid and monthly paid.

2019-10-01 - 2019-10-31 (Oktober) 



- 15 OCT** Payroll
- 16 OCT First salary draft approval
- 18 OCT Final approval of salary
- 21 OCT Optional corrections
- 30 OCT Payment available

You can get more detailed information if you select Salary on the left side of the page. You can view how long you are in the payroll process and the associated cases. Further you can view information about the previous month's payroll and the next month's payroll.

[48117716] BLUEGARDEN...  Visma Portal   

 Home
 Salary

< 2019-10-01 - 2019-10-31 (Oktober) >

 Old version 


Overview Cases

15 OCT	Payroll	15. October 2019 14 day(s) left
16 OCT	First salary draft approval	16. October 2019 Pending
18 OCT	Final approval of salary	18. October 2019 Pending
21 OCT	Optional corrections	21. October 2019 Pending
30 OCT	Payment available	30. October 2019 Pending

< October >

#	Su	Mo	Tu	We	Th	Fr	Sa
40			1	2	3	4	5
41	6	7	8	9	10	11	12
42	13	14	15	16	17	18	19
43	20	21	22	23	24	25	26
44	27	28	29	30	31		

5. Settings

In the menu  and Settings you can select if you want to view the portal in Danish or in English.

Settings

First name
Lone

Last name
Levisen

E-mail
lon@bluegarden.com

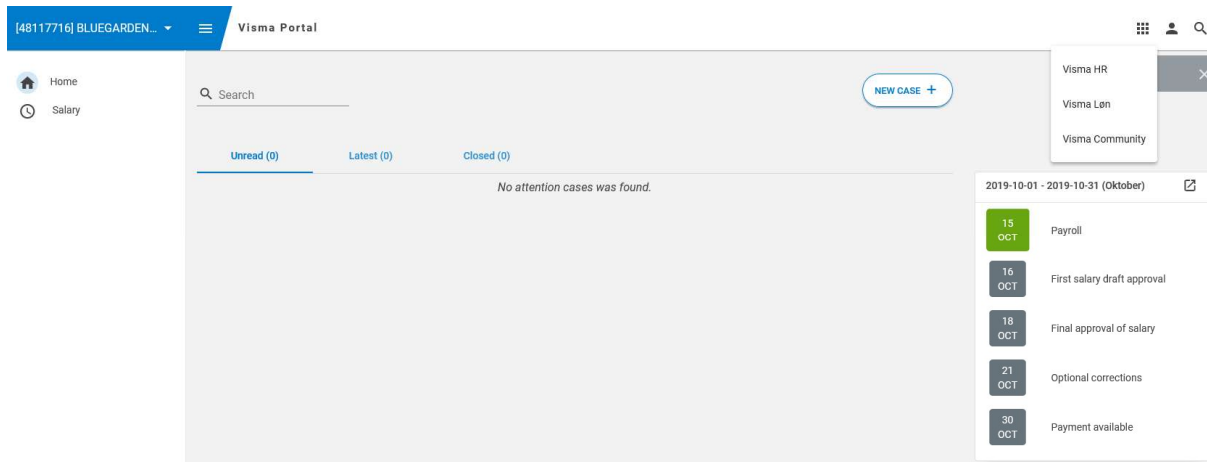
Language
English

Select a language

SUBMIT CANCEL

6. Link

You can access other Visma-systems by clicking the links in the top right corner.



The screenshot shows the Visma Portal interface. The top navigation bar includes a user profile dropdown with the text "[48117716] BLUEGARDEN...", a search bar, and a "NEW CASE +" button. The main content area displays a search bar and three tabs: "Unread (0)", "Latest (0)", and "Closed (0)". Below the tabs, it states "No attention cases was found." On the right side, there is a dropdown menu with options: "Visma HR", "Visma Lon", and "Visma Community". Below the menu is a calendar view for the month of October 2019, showing dates from 15 to 30. The calendar highlights several dates with corresponding events: 15 OCT (Payroll), 16 OCT (First salary draft approval), 18 OCT (Final approval of salary), 21 OCT (Optional corrections), and 30 OCT (Payment available).