

Customising your portal

Portal set-up

To prepare your portal ready for launch we require you to complete 4 templates. The sooner before launch you get these back to us, the better. These templates are available in the portal set-up pack and we recommend completing them in this order:

➔ 1. Sites Template

So that we can add your sites (or regions/locations) to your portal. These site names will also be linked to your employees and jobs, so that when an employee opens the app, they will initially only see vacancies at their allocated site. We recommend using your physical sites (if any) and not go too granular.

➔ 2. Portal User Template

The list of people who will need access to the Care Friends portal to manage referrals, bonus points and/or pay-out requests. These are often recruiters, admins at site, managers and payroll, to name a few. There is no limit on how many portal users you can have. Once we have this list, and a few days before the launch, we will give them access to the portal and ask them to download the app as well.

➔ 3. Employee App User Template

This is the list of employees who are eligible to refer and/or to receive bonus points, and thus require the Care Friends app. We will pre-register them for you so that on launch day they can easily be invited to download the app via a text message from Care Friends. A reminder: we strongly recommend this to be your employees' work email, but personal phone number, as that's where the employee's contact details of friends and family is on.

➔ 4. Job Template

We use this template to pre-create a job in the portal for you, so all you have to do is duplicate it for other roles and activate/deactivate as you see fit. The most important part we are wanting is the job image (may vary for different roles, that is up to you) and a video link with more info about the job or your organisation (recommended).

Click [here](#) to view additional set up, such as:

- Setting up a custom app welcome message
- How to update your organisation's details
- Where does my organisation logo feature
- Changing your password
- How to export all reports
- Scheme rules & point settings
- Referral point FAQ
- New to care bonus

Other important topics

- [Customising your Leaderboard](#)
- [Payment request notifications](#)
- [Candidate initial response report](#)
- [Employee welcome points](#)
- [Peer to Peer sharing](#)
- [Everything you need to know about the Care Friends app](#)
- [Care Friends Successes](#)
- [Customising the automatic notification wording to employees](#)