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Client Online Services

Our client portal allows clients to view the following information:

- View/Print invoices
- View past timesheets of candidates placed with you
- View/Query current and future bookings

Logging into your web portal

To log into your web portal you first need to go to:

<https://www.new-directions.co.uk/web-portal/>

Once there, you will need to enter your client reference (This will have been supplied to you by your account manager at New Directions, if you have previous invoices from us, the client reference will be located on the invoice next to 'A/C REF'). You will then need to select the company as 'Education' and then your password. Your password will have been sent to you previously. If you have lost this, please contact your account manager, who will be able to reset your password. Below is a screenshot of the web portal login:

New Directions
ONLINE SERVICES
Online Services

Your account at your fingertips
24 hours a day, 7 days a week

Clients login here

Welcome to New Directions

For Candidates: If this is the first time you have used this website then you will need to [Activate your account](#). (New Directions Education has provided an [account activation guide](#)).

Candidate Login

NI Number

Company

Password

Client Login

Client Ref

Company

Password

• [New User? Activate your Account for online access.](#) • [Lost Password? Contact Us](#)

Viewing your invoices

Once you are logged in click the 'View Invoices' button at the top of the page. You can now view invoices for each week by clicking the 'View Invoices' link that corresponds to the week beginning of the invoice you are looking for:

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24 hours a day, 7 days a week
Log out of Education

HOME **VIEW INVOICES** TIMESHEETS/BOOKINGS INFO CONTACT US

Invoices

Select a search below to find more specific invoices.

All Invoices by week

Invoice Date	No. of Invoices	
22/11/2015	14	View Invoices
15/11/2015	12	View Invoices
08/11/2015	8	View Invoices

You are now able to view/print all invoices for the week that you selected (**Please note that this option may not be available to all organisations**), or view an individual invoice by clicking the 'View' link. At this point you can tick the 'Printed' and/or 'Paid' boxes that corresponds to the invoice that you have printed and/or paid, you then need to click the 'Update Status' button:

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HOME VIEW INVOICES TIMESHEETS/BOOKINGS INFO CONTACT US

Invoices

All invoices are subject to our [Terms and Conditions](#).

Printing Options

You can view/print an individual invoice using the relevant view link below.

Alternatively:

- [View/Print a summary invoice report](#) (contains a summary of all invoices listed below).
- [View/Print all invoices](#) (all invoices below as individual pages in a single PDF).

The printed and paid columns are there for **your information only**, to allow you to keep a note of which invoices have been printed and which you have paid. Ticking the paid box does not send a message to our accounts dept to say you have paid, it simply provides you with a visual reference. You do not have to use these boxes, it is entirely your choice. To make use of them, just tick the relevant boxes and click on the Update Status button.

[Update Status](#)

View/Print all invoices

View single invoice

Matched Invoices for the date 29/11/2015

Invoice Date	Invoice No	Net	VAT	Gross	Printed	Paid	Action
29/11/15		£403.23	£80.65	£483.88	<input type="checkbox"/>	<input type="checkbox"/>	View

Viewing Candidates Past Timesheets

To view past timesheets hover your cursor over the 'Timesheets/Bookings' button at the top of the page, then in the dropdown menu that appears, click 'Past Timesheets'. Once there you will be able to enter a start date and/or an end date, or you can search past timesheets for an individual candidate:

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HOME VIEW INVOICES **TIMESHEETS/BOOKINGS** INFO CONTACT US

Past Timesheets
Current/Future Bookings

Timesheets

Please use the search box to look up your past timesheets/bookings. You do not need to complete every box.

Search Timesheets

Start Date

End Date

Candidate Name

Search

Once you have your result set, you will be able to see the status of the timesheet(s) and other information, such as position and charge rate. You can also export the results to a CSV by clicking the 'Export Results' button:

Timesheets

Please use the search box to look up your past timesheets/bookings. You do not need to complete every box.

Search Timesheets

Start Date

End Date

Candidate Name

Search

Export Results

- 05/10/2015

Day	Date	Start	End	Units	Charge & Rate	Position	T/S No
Tuesday	06/10/2015	08:30	12:30	1.00	£50.87 (AM Half Day)	LSA 1:1 Reception	
Wednesday	07/10/2015	08:30	12:30	1.00	£50.87 (AM Half Day)	LSA 1:1 Reception	
Thursday	08/10/2015	08:30	12:30	1.00	£50.87 (AM Half Day)	LSA 1:1 Reception	
Friday	09/10/2015	08:30	12:30	1.00	£50.87 (AM Half Day)	LSA 1:1 Reception	

Status: Approved Approved By: Approved by New Directions

View Current/Future Bookings

To view current or future bookings hover your cursor over the 'Timesheets/Bookings' button at the top of the page, then in the dropdown menu that appears, click 'Current/Future Bookings' Once there you will be able to enter a start date and/or an end date, or you can search bookings for an individual candidate. If you find that there is a discrepancy with one of the placements, you can submit a query by clicking 'Query Booking':

Bookings From Week Beginning 30/11/2015

Search Bookings

Start Date

End Date

Candidate Name

Search

Export Results

Query a booking

Location Primary School Contact Jenny Drogan

PO No. Covering For N/A

Day	Date	Start	End	Charge & Rate	Position	Placement No
Monday	30/11/2015	08:30	15:30	£79.95 (LSA Day)	LSA Year 3 1:1	<input type="checkbox"/>
Tuesday	01/12/2015	08:30	15:30	£79.95 (LSA Day)	LSA Year 3 1:1	<input type="checkbox"/>
Wednesday	02/12/2015	08:30	15:30	£79.95 (LSA Day)	LSA Year 3 1:1	<input type="checkbox"/>
Thursday	03/12/2015	08:30	15:30	£79.95 (LSA Day)	LSA Year 3 1:1	<input type="checkbox"/>
Friday	04/12/2015	08:30	15:30	£79.95 (LSA Day)	LSA Year 3 1:1	<input type="checkbox"/>

Query Booking

After clicking 'Query Booking' you will need to enter your query and your name:

Booking Query


Query

Your Name

Send Cancel

Changing Your Password

You can change your login password by hovering your mouse cursor over 'Contact Us' then clicking on 'Change Password':

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Change Password