

Dayforce Flex Work

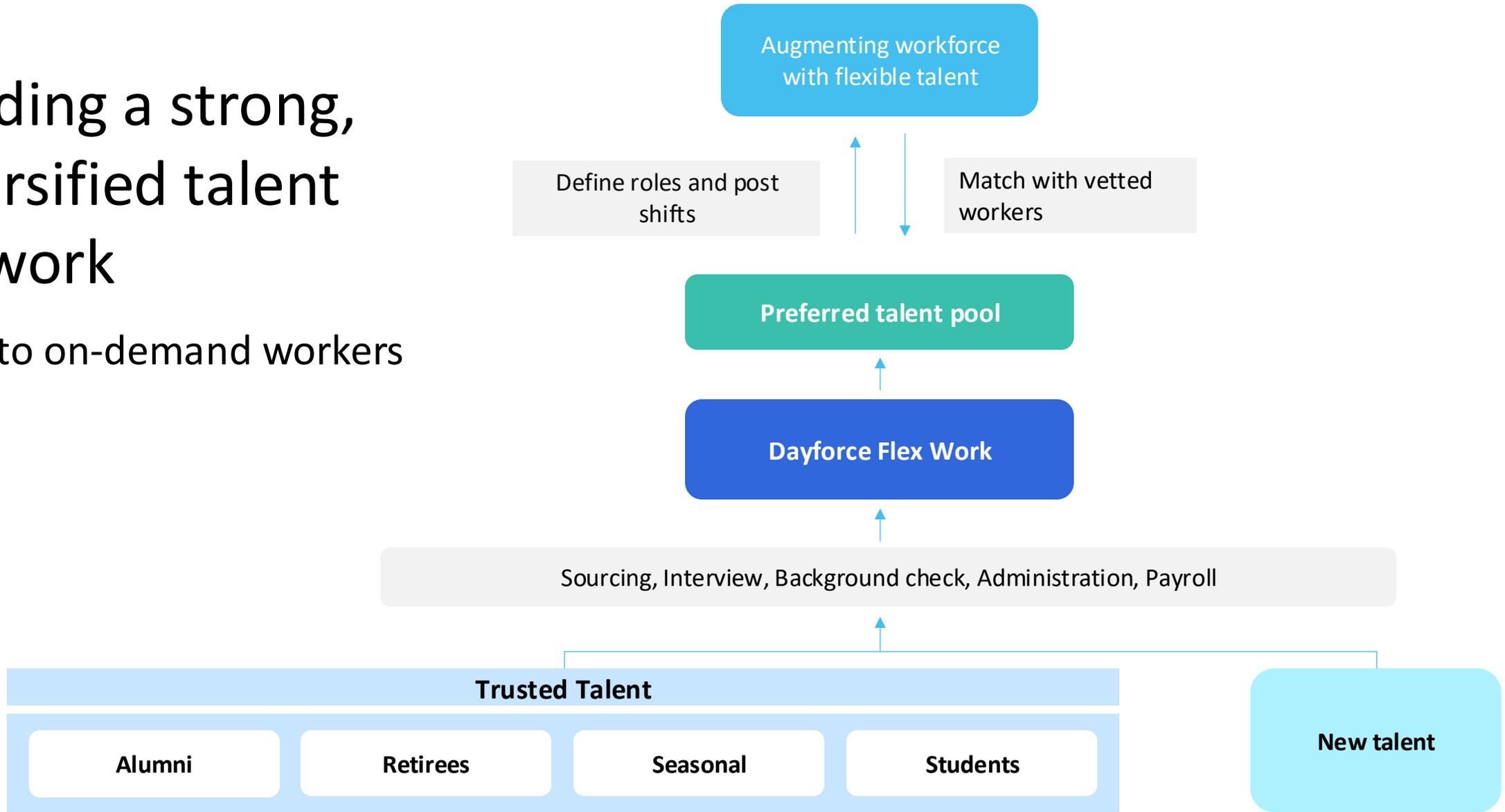
Quick Start Guide

July 2024

dayforce

Building a strong, diversified talent network

Tap into on-demand workers



How it works

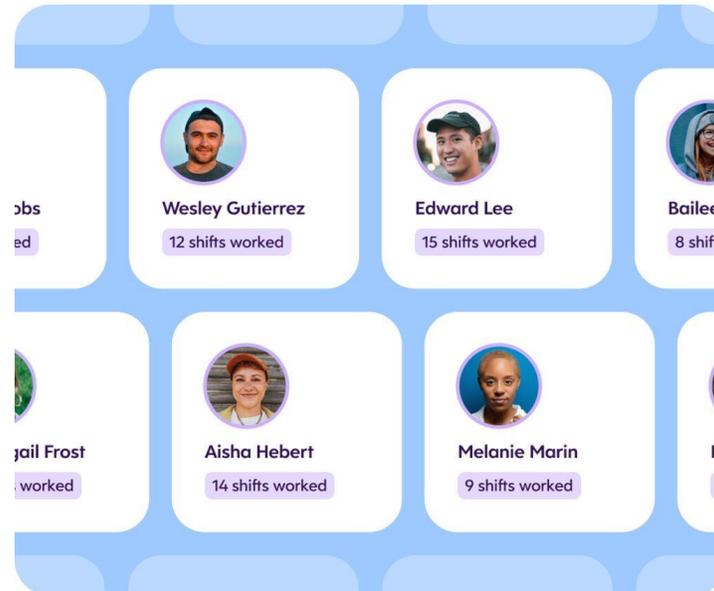
You manage the shifts | We manage the talent

1 Post



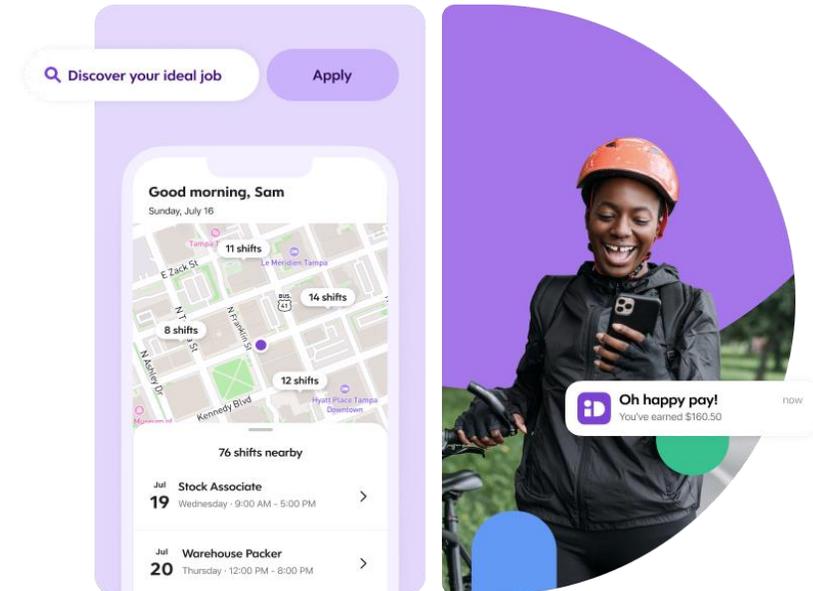
Set your \$ wage rate

2 Match



Instant in-app notifications to your selected W-2 talent pool

3 Approve and pay



You approve time, we pay worker same-day

Pricing: Usage-based model

Only pay when shifts are filled

Example: 20% marketplace fee

Shift Rate		Cost			
\$ Rate / Hour	# Hours	\$ Total Wage	Employment Costs	Marketplace Fee	Total
\$20	5	\$100	\$18	\$20	\$138

YOU set the rate

Payroll Taxes, Processing and Worker's Compensation
*Dependent on job and location

Sourcing, onboarding, support, administration, community, operations, and technology

*For illustrative purposes only. This is not a formal pricing quote.

Getting Started



Activate

Your company's account owner will receive an email from talentmarketplace@ideal.com. Click link to begin next steps.



Registration & Password Set Up

Register for the Ideal Customer Portal and establish a password; this is where your team will oversee shift requests, approve time, and manage billing



Customer Portal Discovery

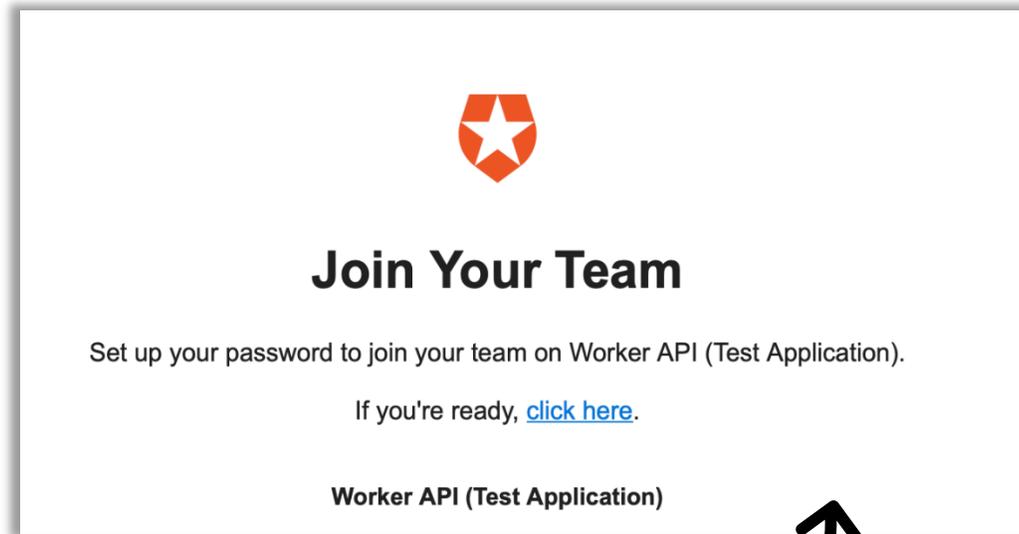
This is where you'll invite your team members & choose their roles. Edit your organization, and add jobs & locations



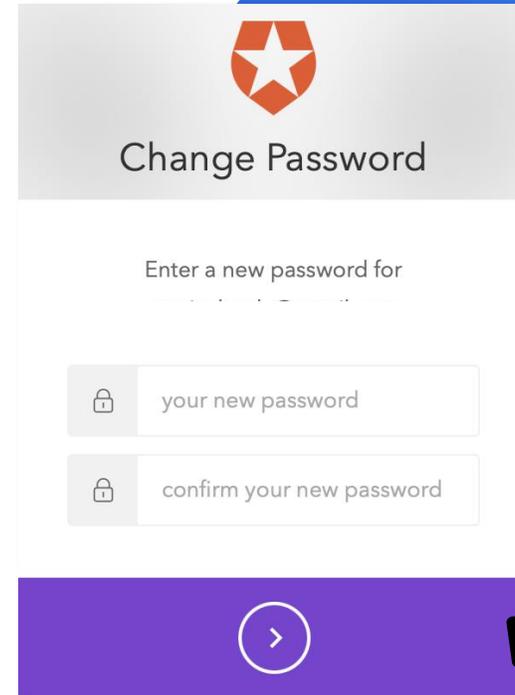
Post First Shift

Ensure you have the location, description and title ready for your first shift posting.

Activation & Log in



This is what your activation email will look like



- New password must:
- Be at least 8 characters in length
- Contain 3 of the 4 following
- Lower & upper case letters
- Numbers (i.e. 0-9)
- Special characters (!@#\$%&?)

Portal Navigation

After creating your password, you'll be directed to your account page.

The screenshot shows the 'Account Settings' page. The left sidebar contains the 'ideal' logo, a '+ New Shift' button, and navigation links for 'Schedule', 'Timesheets', 'Jobs', and 'Locations'. The main content area has two tabs: 'My Account' (selected) and 'Team Members'. Under 'My Account', there are sections for 'Account Details' (with a note to contact an administrator), 'Name' (John Boyle), 'Email' (john.boyle@ceridian.com), and 'Reset Password' (with a 'Send Password Reset Email' button). The bottom left corner shows the user's name 'John Boyle' and the 'ideal' logo.

Here you can manage your organization, invite team members, and assign their roles.

The top screenshot shows the 'Schedule' page with a '+ New Shift' button in the top right. The main content area has a calendar icon and the text 'You don't have any shifts today' with a 'Create a New Shift' button. A red box highlights the user profile 'Grace Lynch' in the bottom right corner of the sidebar, with a red arrow pointing to it. Text below reads: 'Accessing the Administrator Dashboard: From the customer portal home page, click on your organization/location name in the bottom right corner.'

The bottom screenshot shows the same 'Schedule' page. A red box highlights the 'Administrator Dashboard' option in the bottom right corner of the sidebar, with a red arrow pointing to it. Text below reads: 'Navigating to the Administrator Dashboard: Select "Administrator Dashboard" from the options presented.'

Add Team Members

1. Navigate to Account Settings: From any screen on the customer portal, click on your name in the bottom left corner. Select "Account Settings"

2. Go to Team Members: Select the "Team Members" tab

3. Select + New Team Member: Select the "+ New Team Member" button in the upper right-hand corner.

The screenshot shows the user profile for John Boyle in the bottom left corner. A purple arrow points to the "Account Settings" option in the user menu. Another purple arrow points to the "Team Members" tab in the "My Account" section. A third purple arrow points to the "+ New Team Member" button in the top right corner of the "Team Members" page.

4. Enter Team Member Details: Enter team member's business email, first and last name.

5. Choose Role: Select Role from drop down menu..

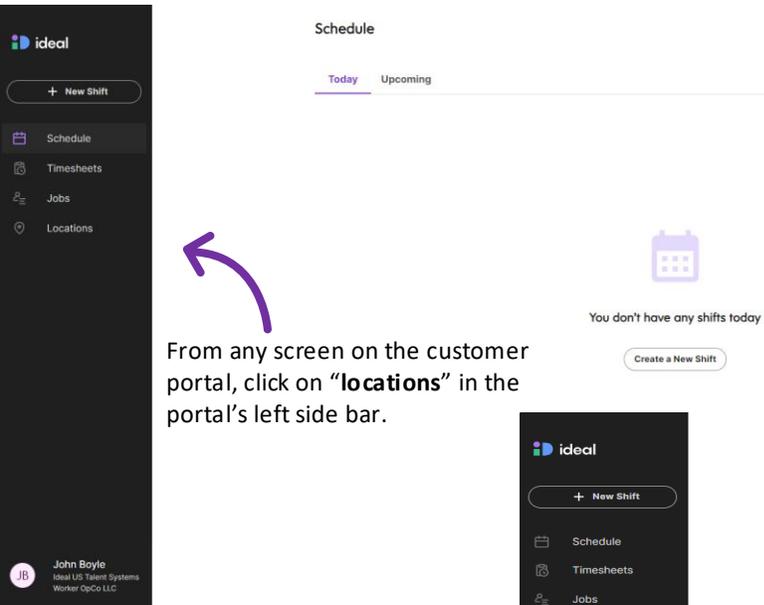
6. Location Access: Give user access to all locations or select specific locations by checking the box beside the location name.

7. Send Invitation: Select "Send Invitation" in the upper right-hand corner.

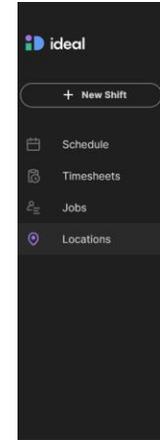
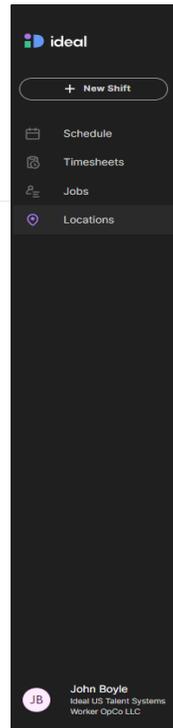
The screenshot shows the "New Team Member" form. It includes fields for "First Name", "Last Name", and "Email Address". Below these is a "Role" dropdown menu with options: "Admin", "Hiring Manager", and "Supervisor". There is a checkbox for "This user can access all locations" and a list of location checkboxes: "St. Francis Soup Kitchen", "Catholic Charities Food Pantry", "HabiJax Restore", "Dayforce SKO 2024", "Test Location 1", and "Dayforce St. Pete Office". A purple arrow points to the "Send Invitation" button in the top right corner.

[Video - How to add team members](#)

Adding locations



From any screen on the customer portal, click on "locations" in the portal's left side bar.



Create New Location

1. Define Location / name: Enter the "Location Name" you'd like to appear for your team within the ideal portal as they post shifts, review schedules and invoices.

2. Ensure Accurate Address: To minimize time theft, our system utilizes geolocation technology. Ideal workers won't be able to clock in if the actual work location is not within 32 ft. of this address.

3. Arrival Instructions: are not required but highly recommended to ensure workers can start their work on time and follow security procedures.

4. Point of Contact: will automatically appear on each shift posting for that location. Name and Phone Number are required. You'll be able to update these fields manually when posting a shift.

The screenshot shows the 'Create New Location' form. It includes fields for 'Location Name' and 'Display Name' (Optional), 'Location Address' (with a search icon and 'Enter a location' placeholder), 'Address 2' (Optional), 'City' and 'State', and 'Zipcode'. There is a 'Save Location' button at the top right. Below these fields is the 'Arrival Instructions' section with a text area and a '0/1000' character count. At the bottom is the 'Point of Contact' section with fields for 'Point of Contact', 'Phone Number', and 'Extension'.

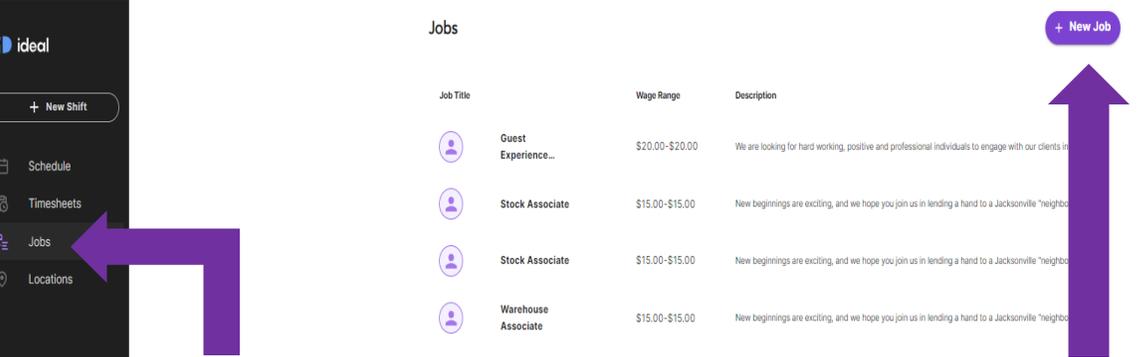
Save Location: Click "Save Location" in the upper right-hand corner

The screenshot shows a table of existing locations. A purple arrow points to the '+ New Location' button in the top right corner.

Location Name	City	Address	Actions
Dayforce St. Pete Office	St. Petersburg	100 2nd Ave N	View
Test Location 1	Dunwoody	5025 Winters Chapel Rd	View
Test Location 1	Dunwoody	5025 Winters Chapel Rd	View
Dayforce SKO 2024	Lake Buena Vista	1900 E Buena Vista Dr	View
HabJax Restore	Jacksonville	5800 Beach Blvd	View
Catholic Charities Food Pantry	Jacksonville	1470 W 13th St	View
St. Francis Soup Kitchen	Jacksonville	134 E Church St	View

Click on "+ New Location" located in upper right corner.

Adding Jobs



Access Jobs: From any screen on the customer portal, navigate to the left sidebar and click on "Jobs." This page will show you a summary view of all the existing jobs your organization can post shifts for.

Note: To accommodate varying hourly rates based on location, we propose incorporating distinguishing factors into the job title.



- 1. Enter Job Title:** Enter the title for the job, which will appear as the headline of your shift posting. Ensure it's easily identifiable as hiring managers will use this when posting shifts.
- 2. Set Wage Range:** Specify a wage range for the job. This range will be used across any location posting this job.
- 3. Description:** In the description field, clearly outline candidate requirements, working conditions, and job responsibilities. You'll have to keep it concise as there is a 1,000-character limit.
- 4. Attire:** List any dress code requirements or clothing that workers must wear to their shift (e.g., closed-toe shoes, black pants).
- 5. Safety Protocols:** Specify any requirements aimed at keeping the work environment safe for your employees and Ideal Workers.

Create New Job

Job Title
The title will be displayed to workers who apply to shifts.
Job Title:

Hourly Wage Range
The hiring manager will be able to select an hourly wage within this range when they create a shift for this job.
Minimum Hourly Wage: Maximum Hourly Wage:
Must be a number

Description
List the duties of this Job and what the worker can expect.
Description:
8/1000

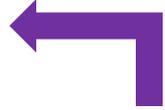
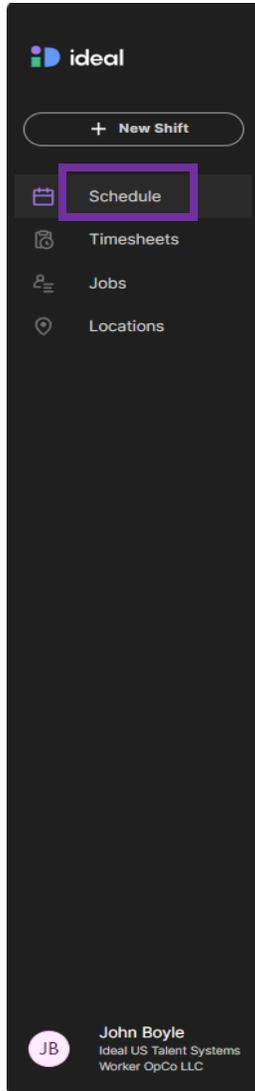
Attire
List any dress code requirements or clothing the worker must wear to their shift, e.g. closed-toe shoes, black pants, etc.
Attire:
0/1000

Safety Protocols
List any health and safety requirements, e.g. Mask required.
Safety Protocols:
0/1000

Save

7. Save Job: Click "Save" in the top right corner. You and your front-line team members can now fill shifts for this job at their locations and match with Ideal talent based on the job description.

Post First Shift



Access New Shift: From any screen select "+ New Shift" located below Ideal logo in upper left-hand corner.

Schedule

Today Upcoming



Alternatively: You can select "Schedule" on left side bar. When on "Schedule" page "+ New Shift" located in upper right-hand corner.



You don't have any shifts today

Create a New Shift



Also, on the "Schedule" screen if you do not have shifts scheduled for the day you can initiate a "+ New Shift" by navigating to center of screen and click "Create a New Shift"

[Video - How to Create a New Shift](#)

Post First Shift

ideal

+ New Shift

Schedule

Timesheets

Jobs

Locations

John Boyle
Ideal US Talent Systems
Worker OpCo LLC

1. Select location: Choose location from drop down

To ensure accuracy and clarity you have the option to review and update the following. As these fields are designed to auto-populate based on information provided when adding locations to portal.

Arrival Instructions: Review the instructions provided for each location to guarantee they are clear and up-to-date. If updates are needed, simply edit the instructions to reflect any new information.

Shift Manager: Verify the assigned shift manager for location. This individual plays a crucial role in overseeing operations during the shift.

Point of Contact: Confirm the designated point of contact for each location. This contact serves as a direct link for communication. If there have been changes in contact information or personnel, make the necessary updates to maintain seamless communication channels.

2. Select Next: Click "Next" to proceed to next step

Create New Shift

Post Shift

1 Location 2 Job 3 Date and Time 4 Review and Post

Location

Where is the shift taking place?

Location
St. Francis Soup Kitchen

Address

Arrival Instructions

Where should the worker go when they arrive? Describe in detail.

B [List Icon] [Table Icon]

Please meet in the parking lot at the corner of Church and N Newan St. The ideal team will be ready to welcome you wearing Ideal t-shirts, and we have one for you too!

Lunch will be served after shifts.

0/1000

Shift Manager

Who will be responsible for supervising this shift and approving timesheets?

Shift Manager
Taylor Steele

Point of Contact

Provide a contact for the worker, such as front desk or reception. (This won't be shared until the worker accepts the shift.)

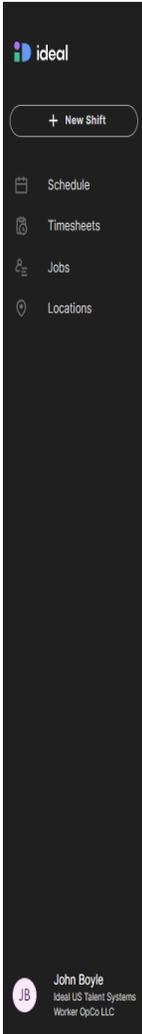
Point of Contact
Chelsey Noack

Phone Number
+1 (763) 898-0178

Extension
Optional

Next

Post First Shift



Create New Shift Post Shift

1 Location 2 Job 3 Date and Time 4 Review and Post

Job

The title will be displayed to workers who apply to shifts.

Job: Warehouse Associate Number of Workers

Description

New beginnings are exciting, and we hope you join us in lending a hand to a Jacksonville "neighbor" as they move spaces!

Ideal is partnering with Catholic Charities Jacksonville (CCJ) to give back to the community. CCJ focuses on food assistance and serves people of all faiths and backgrounds.

Please apply for this shift if you'd like to earn \$ while giving back to the Jacksonville community, AND you can do the following safely and respectfully:

- Listen to directions of Ideal Staff and Catholic Charities Site Coordinator
- Work in a team setting
- Pack, move and load boxes
- Lift up to 50 lbs
- Stand for 5 hours during the shift
- Walk a minimum of 4 miles during the shift
- Provide feedback on Ideal app and experience

Attire

Closest load, comfortable shoes. We will provide you an ideal t-shirt to wear during your shift.

Hourly Wage

Hourly Wage: \$15.00

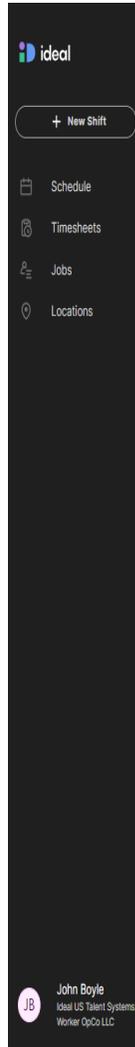
Must be between \$15.00-\$15.00

3. Select Job and Workers:
Choose the job from the drop down that needs to be performed. Specify the number of workers needed. (up to 15 workers per post)

Note: Ensure job description and attire requirements align with actual job conditions : Create a new job or contact support for edits if needed.

4. Enter Hourly Wage: Set the hourly wage, keeping in mind state minimum requirements and wage set when job was created

5. Click "Next" to proceed to next step



Create New Shift Post Shift

1 Location 2 Job 3 Date and Time 4 Review and Post

Date and Time

When does the shift happen?

Date: 05-04-2024

Start Time: 09:00 AM End Time: 05:00 PM

Breaks

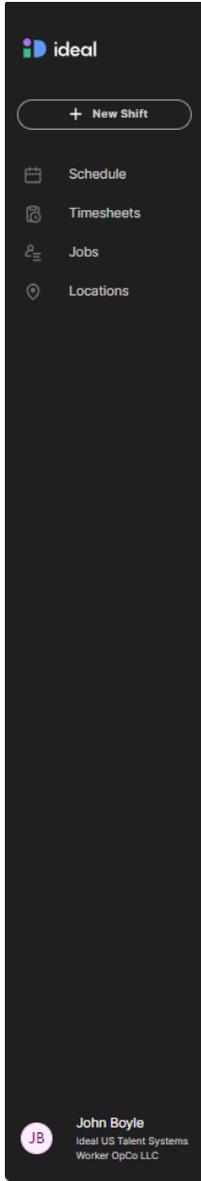
Breaks are determined by the length of the shift according to [Ideal's Break Policy](#). Unpaid meal breaks are deducted from the hours worked.

6. Enter Shift details: Specify the date and time of the shift. A single shift can be up to 10 hours but no less than 3 hours

7. Click "Next" to proceed to next step

Note: For shifts 6 hours or longer, allow ideal workers a 30-minute unpaid break (timing not dictated by the portal).

Post First Shift



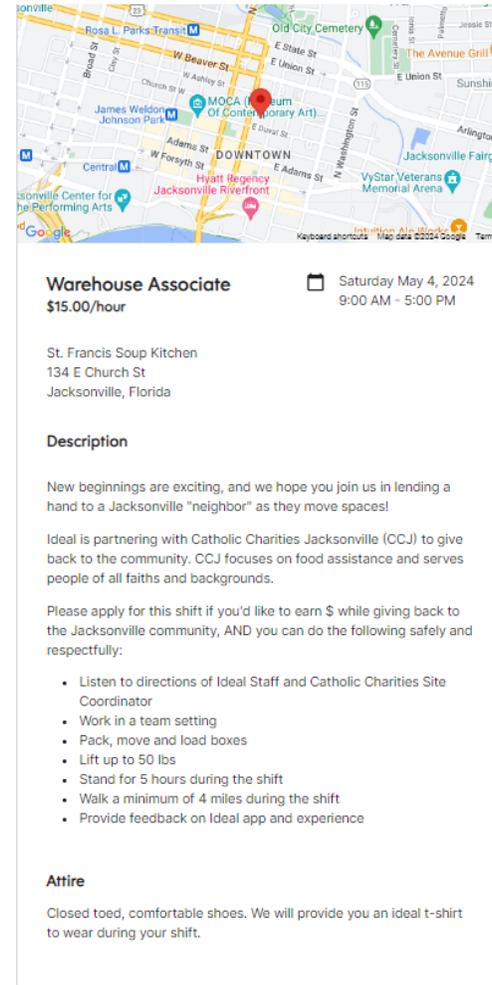
Create New Shift

8. Review and Edit:

Review the shift details for accuracy. If edits are needed, click "Back."

Check the map on the posting; if not populating, check "upcoming" shifts in the Schedule tab.

If issues persist, contact the support team.



Post Shift



9. Post or Save as Draft:

Click "Post Shift" in the upper right corner to publish the shift.

Approving Timesheets

ideal

+ New Shift

Schedule

Timesheets

Jobs

Locations

Timesheets
Timesheets that have not been reviewed within 48 hours will be automatically approved for billing.

1 Ready for Review Pending Approved

Monday, July 29

Filter by Location
Show All

Worker	Location	In	Out	Meal Start	Meal End	Hours	Actions
	Seffner Christian Academy	2:25 PM	5:30 PM	-	-	3h 5m	<input checked="" type="checkbox"/> Approve

Review Time recorded:
If time is accurate "click" Approve.

Access Timesheets: From any screen

John Boyle
New Tampa Party Rentals LLC

Approving Timesheets



+ New Shift

Schedule

Timesheets

Jobs

Locations

Timesheets

Timesheets that have not been reviewed within 48 hours will be automatically approved for billing.

1 Ready for Review Pending Approved

Monday, July 29

Filter by Location

Show All

Worker	Location	In	Out	Meal Start	Meal End	Hours	Actions
	Seffner Christian Academy	2:25 PM	5:30 PM	-	-	3h 5m	Approve ⌵

View Shift Details

View Profile

Dispute

Review Shift Details

1. Click the dropdown menu.
2. Select "View Shift Details."

The details will appear on the right side, allowing you to compare the scheduled shift with the actual punch times. You can also approve the timesheet from this view.

General Laborer

\$16.00/ hour

Seffner Christian Academy

[Approve](#)

Date

07/29/2024

Shift Start

SCHEDULE 2:30 PM CLOCK IN 2:25 PM

Shift End

SCHEDULE 5:30 PM CLOCK OUT 5:30 PM

Total Paid Hours

SCHEDULE 3h 00m CLOCK 3h 5m

Shift Manager Harvey Wilson

JB

John Boyle
New Tampa Party
Rentals LLC

Approving Timesheets

The screenshot shows the Ideal Timesheets interface. On the left is a dark sidebar with the Ideal logo and navigation options: '+ New Shift', 'Schedule', 'Timesheets', 'Jobs', and 'Locations'. The main content area is titled 'Timesheets' and includes a note: 'Timesheets that have not been reviewed within 48 hours will be automatically approved for billing.' Below this are tabs for 'Ready for Review' (with a count of 1), 'Pending', and 'Approved'. A date filter is set to 'Monday, July 29'. A table lists timesheet entries with columns: Worker, Location, In, Out, Meal Start, Meal End, Hours, and Actions. One entry is shown for 'Seffner Christian Academy' with a duration of '3h 5m'. The 'Actions' column for this entry has a dropdown menu with 'Approve' and 'Dispute' options. The 'Dispute' option is highlighted with a purple box. A pop-up menu is visible over the 'Dispute' button, containing 'View Shift Details', 'View Profile', and 'Dispute'.

Dispute Timesheet

1. Click the dropdown menu.
2. Select "Dispute."

A pop-up text box will appear where you can add the reason and submit the dispute,

After Submitting a Timesheet Dispute

Once you submit the dispute, the timesheet status will change to "Pending" until the resolution is complete.

Dayforce Flex Work Support will collaborate with your team and the worker to resolve and accurately record the correct time worked.

JB

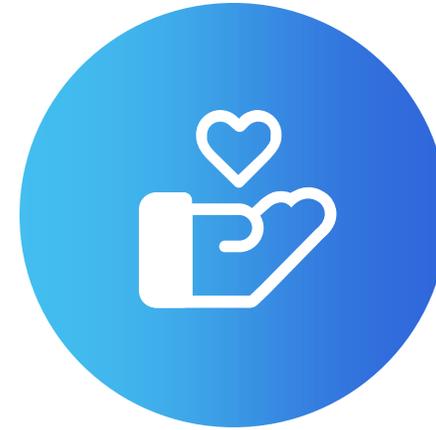
John Boyle
New Tampa Party
Rentals LLC

Helpful Tips



Knowledge Base

Explore our [knowledge base](#) for a plethora of helpful tips and guidance to assist you along the way.



Support

Looking for more help?
Contact our amazing support team at
customersupport@ideal.com
or call 612-324-5281

Thank you

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