CUSTOMER PORTAL

Customer Portal — Four Personas, One Tenant

Client admin, finance admin, manager, and employee — each scoped to their role.

The Customer Portal is where your clients and their worksite employees actually live in the platform — one responsive web app (plus a mobile PWA) that serves four distinct personas from the same tenant, each seeing only what their role allows. It is the surface the client judges the PEO by every day.

1 The four personas

Persona (role)	What the portal gives them
Client admin	Roster and org chart; payroll approvals, off-cycle and one-time-pay requests; benefits and open-enrollment oversight; PTO policy; company documents; reports. One login can administer **multiple client orgs** via the org switcher (user-tenant memberships).
Finance admin	The client's money view — invoices, statements, funding, and payment detail — without the HR / roster surface. Separation of finance from HR at the client, mirroring the PEO side.
Manager	Team view: approve their team's PTO and timesheets and see direct-report basics — scoped to their reports, never the whole company.
Employee (WSE)	Pay stubs, W-2 and 1095-C, benefits enrollment and elections, PTO balance and requests, direct deposit and W-4 self-service, personal documents, and their onboarding flow.

2 Everywhere, and assistive

Beyond the desktop

- **Mobile PWA** installable straight from the browser, with web push for the employee experience.
- **AI assistant** for self-service questions, plus a propose »» confirm »» execute flow for PTO actions — included, and activated with your own AI provider key; it proposes, the employee confirms, and it never executes a high-stakes action on its own.
- Every read and write is **role- and tenant-scoped**; an employee physically cannot load another employee's stub, and no request crosses a client boundary.

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