

STEP-BY-STEP MANUAL

Creating a Client on OLi

Step 1: Log In to Your OLi Account

- Open your web browser and log in to your OLi account using your credentials.

Step 2: Access the Dashboard

- Upon logging in, you will be redirected to the dashboard.

Step 3: Create a Client - Option 1

- From the dashboard, locate the "Create Client" button at the top. Click on it.

Step 4: Create a Client - Option 2

- Alternatively, you can access the menu section and click on "Create Client."

Step 5: Fill Out the Client Form

- Once you click on "Create Client," a client form will appear.
- Select the client type (e.g., Corporation).
- Specify the services provided to the client (e.g., BIR, SSS, PAG-IBIG, PhilHealth, and other business registration forms).

Step 6: Provide Client Information

- Fill out the required client information in the form.
- Enter the client name (e.g., ABC Corporation).
- Fill in the required fields marked with a red box, such as the contact person's name, contact number, and contact email.

Example:

- Contact Person: Juan Santos
- Contact Number: 0915 881 8823
- Contact Email: juan.santos@abccorporation.com.ph
- Select the client start date, for instance, October 1st.

Step 7: Add Client

- After filling out the required information, click on the "Add Client" button.

Step 8: Confirmation

- Confirm that the client has been successfully added.

Step 9: Additional Information

- Explore the client information form and understand how to navigate and make changes.
- Stay tuned for another training video that will cover more details about this client information form.

Step 10: Questions and Support

- If you have any questions or need assistance related to this training video, feel free to ask or email OLi's support team at support@oli.com.ph.

Step 11: Conclusion

- Congratulations! You have successfully learned how to create a client in OLi. Look forward to more training videos covering advanced features.

Note: Ensure that you have accurate and complete client information to facilitate smooth processes within the OLi platform.