STEP-BY-STEP MANUAL

Utilizing Client File Vault on OLi

Step 1: Log In to Your OLi Account

- Open your web browser and go to app.oli.com.ph.
- Log in using your credentials.

Step 2: Access the Dashboard

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

Step 3: Navigate to Client Section

- Go to the client section; you might have learned this in a previous training video.
- Locate the folder labels for business documents (BIR, SSS, PAG-IBIG, PhilHealth).

Step 4: Upload Business Documents

- Choose a specific client (e.g., Test Company).
- Upload business documents by clicking on the appropriate label (e.g., Certificate of Incorporation).
- Follow the prompts to upload the file.

Step 5: Access Client Tasks

- Explore client tasks assigned to your client by clicking on the "Client Tasks" section.
- Check specific tasks (e.g., "Send funds for the payroll - December 15, 2023") and view related conversations.

Step 6: Explore Client Updates

- Navigate to the "Client Updates" section.
- Review updates and conversations related to the client (e.g., "Need approval for financial statements").
- Open files associated with the updates.

Step 7: Manage Teams and Services

- Refer to another training video for managing teams and assigning default teams for clients.

Step 8: Edit Client Services

- If a client is no longer enrolled for certain services (e.g., SSS, PhilHealth), edit the client.
- Uncheck the corresponding services to hide labels.

Step 9: Save Client Changes

- Click "Save Client" to confirm changes.
- Verify that the labels are hidden but files are retained.

Step 10: Delete Client (Optional)

- If needed, you can delete a client (but needs to inform OLi Support).
- Ensure there are no associated files before deletion.

Step 11: Conclusion and Questions

- Congratulations! You've learned how to utilize the Client File Vault on OLi.
- For any questions or clarifications, feel free to email OLi's support team at support@oli.com.ph.

Note: Ensure that you follow company protocols and policies while managing client files and information. Regularly update and secure client data for smooth workflow and compliance.