

STEP-BY-STEP MANUAL

Assigning a Team in a Client 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 Client List

- Once logged in, go to the "Clients" section.
- You can either choose "Client List" or select a client directly from the list (e.g., XYZ Corporation or ABC Corporation).

Step 3: Navigate to Manage Team

- Select the client you want to assign a team to (e.g., XYZ Corporation or ABC Corporation).
- Look for the "Manage Team" option and click on it.

Step 4: Add Team Members

- In the "Manage Team" section, add team members by entering their names (e.g., Zach Bravo, Carla, Andrew Bernales, Stephanie).
- Assign roles to each team member (e.g., Manager, Staff).
- Set default assignments if needed (e.g., preparer, reviewer, approver).

Step 5: Save Team Changes

- Click on the "Save" or "Assign Team" button to save the changes made to the team.

Step 6: Clear Notifications (Optional)

- If there are notifications on the screen, you can clear them by clicking on the notification area.

Step 7: Verify Team Assignment

- Check the team members and their roles to ensure they are correctly assigned.
- For example, Zach as the manager, Carla and Andrew as staff members, with specific roles.

Step 8: Assigning Team to a Project (Optional)

- Create a project for the client by navigating to the "Projects" section.
- Select the client (e.g., ABC Corporation) and notice that the preparer, first reviewer, second reviewer, and approver fields are already filled based on the default team members assigned.

Step 9: Clear Notifications (Optional)

- If there are new notifications, clear them as needed.

Step 10: Conclusion and Support

- Congratulations! You've successfully learned how to assign a team to a client on OLi.
- For any questions or clarifications, feel free to email OLi's support team at support@oli.com.ph.

****Note:**** Ensure that you carefully assign roles and default team members for efficient workflow management within the OLi platform. Regularly update team assignments as needed.