STEP-BY-STEP MANUAL
Creating and Managing Projects in Oli

Step 1: Log In to OLi
  - Open your web browser and navigate to Oli's website (app.Oli.com.ph).
  - Log in using your credentials.

Step 2: Access Projects Section
  - Once logged in, go to the "Projects" section in the Oli dashboard.

Step 3: Create a New Project
  - Click on the "Create Project" button at the top of the Projects page.

Step 4: Select a Client
  - Choose a client for the project (e.g., ABC Corporation).

Step 5: Fill Out Project Details
  - Enter project details:
     - Project Name: e.g., Monthly Bookkeeping
     - Project Date: e.g., November 2023
     - Start Date: Choose a date relevant to the project.
     - Statement Availability: e.g., 4th of November
     - Deadline: e.g., Mid-month
  - Click "Save" to proceed.

Step 6: Add Tasks to the Project
  - Within the project, click on the search bar and filter for the client (e.g., ABC Corporation).
  - Add tasks related to the project (e.g., Compile all bank statements).
  - Include descriptions, assign tasks to specific team members, add comments, and review notes.
  - Click the "x" button to save the task automatically.

Step 7: Add More Tasks (Optional)
  - Continue adding tasks as needed (e.g., Compile Reconciliation Statements).
  - Ensure you specify details such as vendors.

Step 8: Duplicate Project (Optional)
  - If the process is similar to another client, go to "Manage" and duplicate the project.
  - Choose the client (e.g., XYZ Corporation) and duplicate the project for a different month or with slight modifications.

Step 9: Edit Project Details (Optional)
  - Modify project details within the duplicated project (e.g., change the month to November).
  - Adjust specific details if needed.

Step 10: Save Changes
- Ensure to click "Save" to confirm changes made to the duplicated project.

Step 11: Conclusion and Support
- Congratulations! You have successfully created and managed a project in Oli.
- If you have any questions or need clarification, feel free to email Oli's support team at 9support@oli.com.ph.

Note: Regularly update and monitor project details to ensure accurate tracking and completion. Utilize duplication features for efficiency across similar projects.