1. Registering an account
2. Updating your company’s information
3. Adding new users
4. Setting user access permission
5. Creating task
6. Uploading My Drive
7. Making payment
1. Input all required information and click “Register”

2. System will automatically return to Website. Click “Sign in” to enter PLF’s CRM system
WELCOME TO PLF’S CRM SYSTEM
Contents of all posts, conversations between PLF and account users

List all requests created by users

Store all documents relating to each Task

Summarize, analyze all occurred service fees

Track all payment transactions between PLF and user (or user’s company)

Manage all users who are invited/added to the Client’s account
UPDATING YOUR COMPANY INFORMATION
### Legal Information (for VAT invoice, contract, payment, ...)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name</td>
<td>CRM Manual</td>
</tr>
<tr>
<td>Tax code</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Zip/Postal code</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>Afghanistan</td>
</tr>
</tbody>
</table>

### Representative

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
</tr>
<tr>
<td>ID card/Passport No</td>
<td></td>
</tr>
</tbody>
</table>

### Bank detail

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank name</td>
<td></td>
</tr>
<tr>
<td>Bank address</td>
<td></td>
</tr>
<tr>
<td>Bank account holder name</td>
<td></td>
</tr>
<tr>
<td>Bank account number</td>
<td></td>
</tr>
<tr>
<td>SWIFT</td>
<td></td>
</tr>
</tbody>
</table>

Click here to edit/input your company’s profile.
3

ADDING NEW USERS
### Step #1

- **Manage User**

### Step #2: Add your colleagues here

- Click on the "INVITE" button to add colleagues to your list.

---

**Extranet User List**

<table>
<thead>
<tr>
<th>ID</th>
<th>User Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*No data available in table.*
Invite to workgroup

- Invite external users who are already registered
- Input your colleagues' email addresses, comma separated
- Input the message that you would like to send to your colleagues
- Click here to finish

- Invite your colleagues who have already registered CRM with PLF
- Input your colleagues' email address which they use to register PLF's account
- Input the message that you would like to send to your colleagues

Send Invitation  CANCEL
Input information of member who you would like to add → “Send invitation”

Click here and choose “add” to invite a member who hasn’t created PLF’s account
A notification email will be sent to the new added member. Use the given password for login.

Go to https://team.plf.vn
The admin user can manage all users in their group here.
SETTING USER ACCESS PERMISSION
Click here to set access permission for users
The system has 05 roles in default:

- **Admin**: manage all tasks, payments, add new users and assign role
- **Task**: manage tasks
- **Payment**: manage all transactions relating to fees and payments
- **Manage user**: add new users to company account
- **Assign role**: assign role for other users
The admin user can also change the permission for each role

**Step #1:** click the role that would like to change

**Step #2:** choose “On” or “Off” at each function for setting → Click “Save” to finish editing
Steps to change permission for each user

Step #1: click here to add user

Step #2: name the role of user (ex: sales, secretary,...)

Step #3: choose user and roles
→ “Save” to finish
Access to Notifications & Chats

Click to the “Bell icon” to review your notifications and chats
Create Chats/ Group Chat with other people

Step #1: Create group chat with your colleagues or PLF’s member

Step #2: Invite other colleagues or PLF’s member in the group chat

If you have added your colleagues in “Manage User”, you can chat to your colleagues here or PLF’s member will keep in touch to you here for further discussion and send documents.
CREATING TASK
Click "New task" from "Activity Stream" or "NEW TASK" from "Tasks" to send New request to PLF.
Your request (ex: review contract)

Detail/description of the request (ex: contract in English, 30 pages,...)

Attach files for reference (if any)

Task’s requester (can add other users by click “Add more” so that they can also see the task)

Request’s field (optional → can leave it blank)

How you would like to be charged (optional → can leave it blank)

• “Save as draft”: for internal review/approval before sending to PLF
• “Assign to PLF”: send request to PLF immediately
6 UPLOADING MY DRIVE
1. Client go to tab “My Drive”
2. Choose “ADD”
3. On drop-down list, choose “File” or “Folder” to save documents into PLF’s CRM system
The documents saved in CRM system can be retrieved transparently between clients and PLF anytime.
MAKING PAYMENT
Client’s Billing

Enter the “Billing” function to check your company payment status: outstanding amount, due date and other statuses.

- **“Pay as you go”**: only able to pay due debt
- **“Pay all”**: pay all open invoices (including overdue invoices and upcoming invoices)
- **“Deposit & Pay once a month”**: depend on the confirmation of Client and PLF on payment schedule

➔ Click “Make a payment” to process
You can check/review detail of the payment here
Client go to tab “Transaction” to view your Payment Request Form, Proforma-invoice (if needed), Invoice and statuses.
Enter the "Transaction" function to check your company payment transactions and invoices.

<table>
<thead>
<tr>
<th>ID</th>
<th>Date Time</th>
<th>Description</th>
<th>Amount</th>
<th>Record</th>
<th>Status</th>
<th>Notes by client</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dec 09, 2019</td>
<td>VND 3,000,000</td>
<td>Paid</td>
<td>Agree</td>
<td>By Admin</td>
<td></td>
</tr>
</tbody>
</table>
THANK YOU FOR READING