

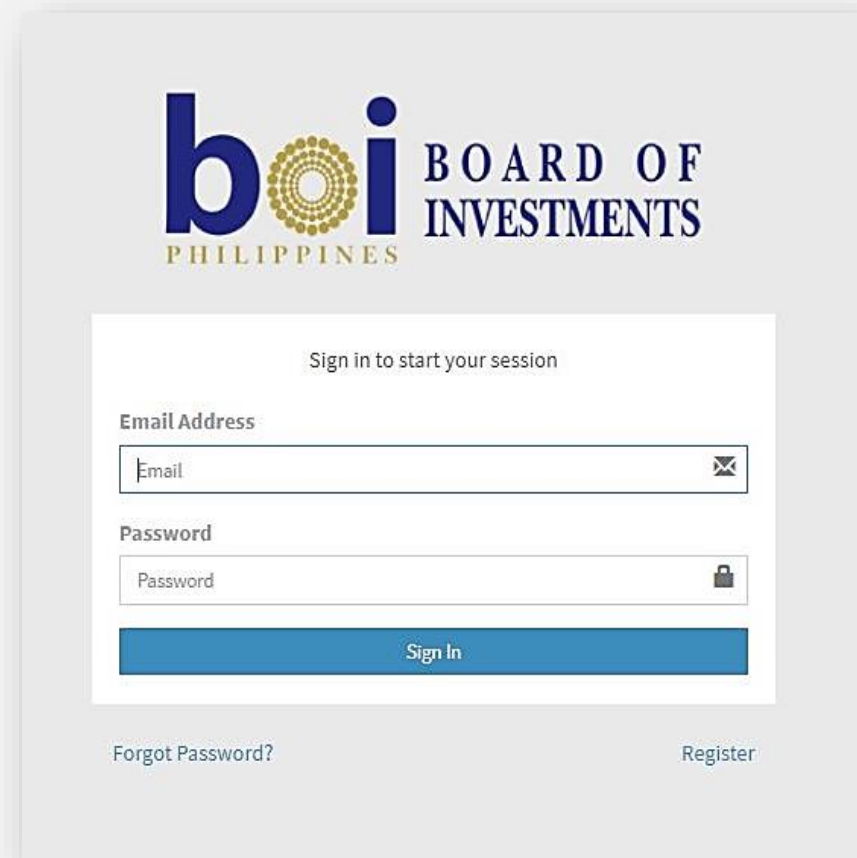
CLIENT USER'S MANUAL- FOR INQUIRIES

User's Manual

Creating an Inquiry

Step 1

Log in using the email and password you have registered with.



The image shows a login form for the Board of Investments Philippines. At the top is the logo, which consists of the lowercase letters 'boi' in blue, a circular gold emblem with a sunburst pattern, and the words 'BOARD OF INVESTMENTS' in blue and 'PHILIPPINES' in gold below it. The form itself is a white box with a light gray border. It contains the text 'Sign in to start your session' at the top. Below this are two input fields: 'Email Address' with a placeholder 'Email' and an envelope icon, and 'Password' with a placeholder 'Password' and a lock icon. A blue 'Sign In' button is positioned below the password field. At the bottom of the form, there are two links: 'Forgot Password?' on the left and 'Register' on the right.

boi BOARD OF INVESTMENTS
PHILIPPINES

Sign in to start your session

Email Address
Email

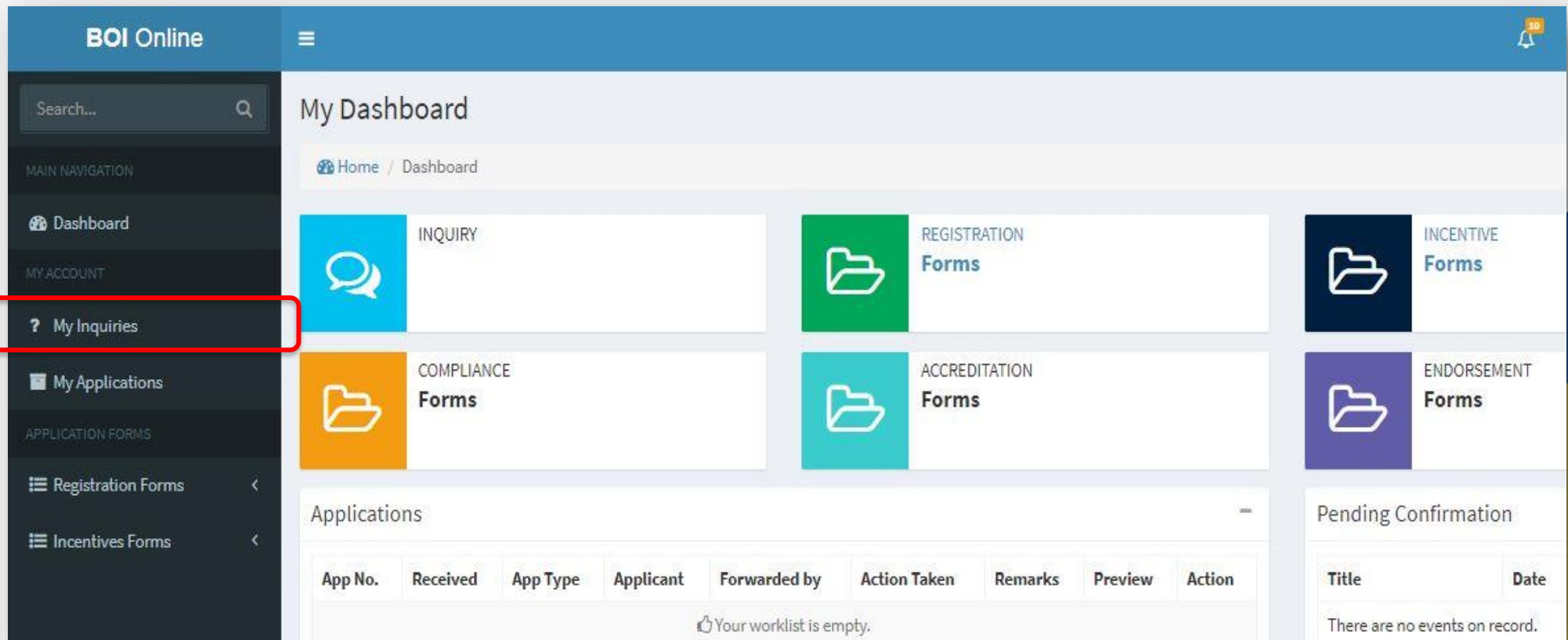
Password
Password

Sign In

[Forgot Password?](#) [Register](#)

Step 2

Click on the **My Inquiries** link on the navigation on the left.



The screenshot shows the BOI Online dashboard interface. The left navigation menu is dark blue and contains several sections: 'MAIN NAVIGATION' with a 'Dashboard' link; 'MY ACCOUNT' with a 'My Inquiries' link highlighted by a red rectangle; 'My Applications'; and 'APPLICATION FORMS' with 'Registration Forms' and 'Incentives Forms' links. The main content area is titled 'My Dashboard' and features six colored tiles: 'INQUIRY' (blue), 'REGISTRATION Forms' (green), 'INCENTIVE Forms' (dark blue), 'COMPLIANCE Forms' (orange), 'ACCREDITATION Forms' (teal), and 'ENDORSEMENT Forms' (purple). Below the tiles is an 'Applications' table with columns: App No., Received, App Type, Applicant, Forwarded by, Action Taken, Remarks, Preview, and Action. The table is currently empty, with a message 'Your worklist is empty.' below it. On the right side, there is a 'Pending Confirmation' section with columns for Title and Date, also showing 'There are no events on record.'

Step 3

Click on the **New Inquiry** button.

The screenshot shows a web application interface for 'My Inquiries'. On the left is a dark sidebar with a search bar and navigation links: 'Dashboard', 'My Inquiries', 'My Applications', 'Registration Forms', and 'Incentives Forms'. The main content area has a title 'My Inquiries' and a breadcrumb 'Home / My Inquiries'. Below this is a summary row with filters: 'Worklist 1', 'Open 2', 'Closed 0', and 'Unsubmitted 3'. A table below shows one inquiry: '[369] Created on: June 25, 2018, 11:44 a.m.' with 'View' and 'Reply' buttons. A red box highlights the '+ New inquiry' button in the top right corner.

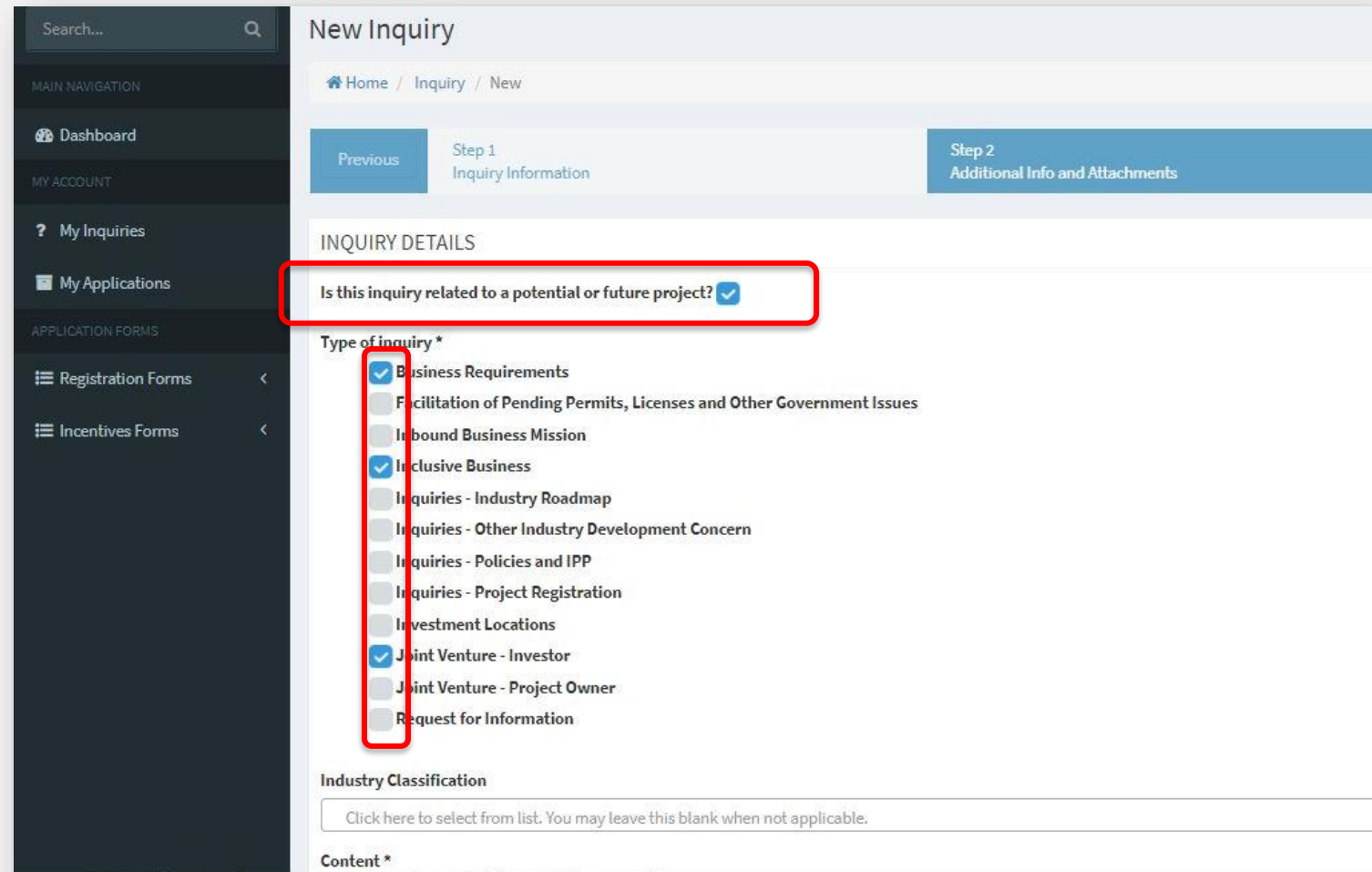
Worklist	Open	Closed	Unsubmitted
1	2	0	3

[369] Created on: June 25, 2018, 11:44 a.m.	View	Reply
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Step 4

Indicate whether the inquiry is related to a potential or future project. For inquiries related to a potential or future project, the type(s) of inquiry will also need to be provided. Click on the **Proceed** button when done.

Fields with asterisks (*) are required fields



The screenshot shows a web application interface for a 'New Inquiry'. The page has a dark sidebar on the left with navigation options: 'Dashboard', 'My Inquiries', 'My Applications', 'Registration Forms', and 'Incentives Forms'. The main content area is titled 'New Inquiry' and shows a progress bar with 'Step 1 Inquiry Information' and 'Step 2 Additional Info and Attachments'. Below the progress bar, there is a section for 'INQUIRY DETAILS'. A red box highlights a checkbox labeled 'Is this inquiry related to a potential or future project?' which is checked. Below this, there is a section for 'Type of inquiry *' with a list of options, each with a checkbox. A red box highlights this list. The options are: 'Business Requirements' (checked), 'Facilitation of Pending Permits, Licenses and Other Government Issues', 'Inbound Business Mission', 'Inclusive Business' (checked), 'Inquiries - Industry Roadmap', 'Inquiries - Other Industry Development Concern', 'Inquiries - Policies and IPP', 'Inquiries - Project Registration', 'Investment Locations', 'Joint Venture - Investor' (checked), 'Joint Venture - Project Owner', and 'Request for Information'. Below the list, there is a field for 'Industry Classification' with a placeholder text 'Click here to select from list. You may leave this blank when not applicable.' and a 'Content *' field.

Step 5

Fill in all the necessary fields in the form that appear. Please note that the fields that would appear on this step are dependent on the Types of Inquiry that you've been selected in Step 1.

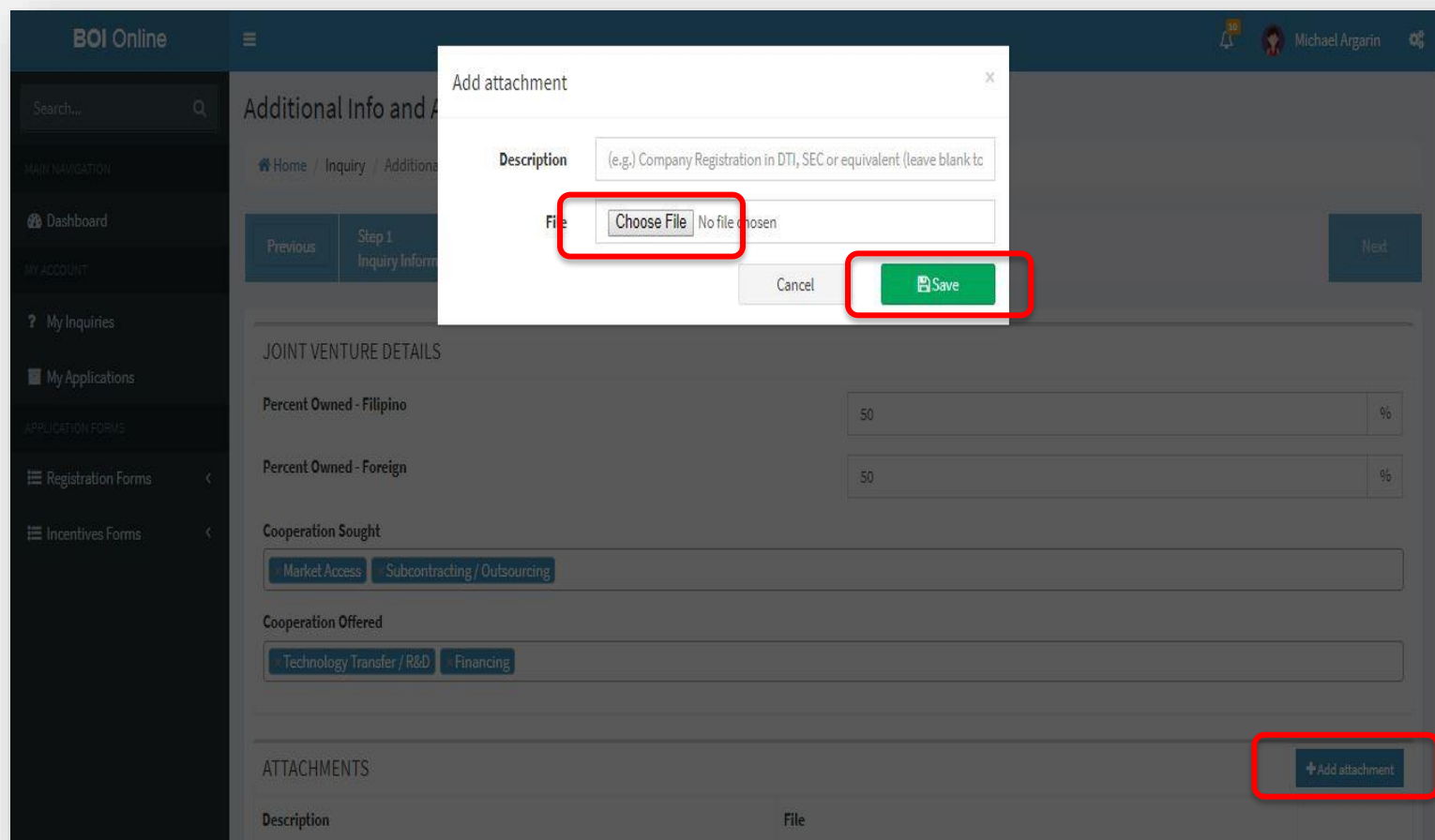
For inquiries that are not related to a potential or future project, you may skip to **Step 7** in this document.

The screenshot shows a web application interface for 'Additional Info and Attachments'. On the left is a dark sidebar with navigation options: Search..., MAIN NAVIGATION (Dashboard), MY ACCOUNT (My Inquiries, My Applications), and APPLICATION FORMS (Registration Forms, Incentives Forms). The main content area has a breadcrumb trail: Home / Inquiry / Additional Info and Attachments. Below this is a progress bar with 'Previous', 'Step 1 Inquiry Information', 'Step 2 Additional Info and Attachments', and 'Next'. The form section is titled 'JOINT VENTURE DETAILS' and contains the following fields:

Field Name	Value	Unit
Percent Owned - Filipino	10	%
Percent Owned - Foreign	10	%
Cooperation Sought	Click here to select from list	
Cooperation Offered	Click here to select from list	

Step 6

To attach a file, click the **Add attachment** button to show the add attachment prompt, then click on the **Choose File** button to select the file you would like to upload. You may also indicate a description for your attachment. Click **Save** to upload the file.



The screenshot displays the BOI Online interface. A modal dialog box titled "Add attachment" is centered on the screen. The dialog contains a "Description" field with the placeholder text "(e.g.) Company Registration in DTI, SEC or equivalent (leave blank to)", a "File" field with a "Choose File" button and the text "No file chosen", and two buttons at the bottom: "Cancel" and "Save". The "Save" button is green and features a document icon. In the background, the main application window is visible, showing a sidebar with navigation options like "Dashboard", "My Inquiries", and "My Applications". The main content area displays "JOINT VENTURE DETAILS" with fields for "Percent Owned - Filipino" (50%) and "Percent Owned - Foreign" (50%). At the bottom right of the main window, there is a button labeled "+Add attachment" which is highlighted with a red box.

Step 7

Click the **Submit** button.

The screenshot shows a web application interface for 'Additional Info and Attachments'. The page is divided into several sections:

- Navigation:** A dark sidebar on the left contains a search bar and menu items: 'Dashboard', 'My Inquiries', 'My Applications', 'Registration Forms', and 'Incentives Forms'.
- Breadcrumbs:** 'Home / Inquiry / Additional Info and Attachments'.
- Progress:** A horizontal bar shows 'Step 1 Inquiry Information' as the active step and 'Step 2 Additional Info and Attachments' as the current step. 'Previous' and 'Next' buttons are also present.
- JOINT VENTURE DETAILS:**
 - Percent Owned - Filipino:** A green progress bar shows 50.00 %.
 - Percent Owned - Foreign:** A green progress bar shows 50.00 %.
 - Cooperation Sought:** Includes 'Market Access' and 'Production Facility' tags.
 - Cooperation Offered:** Includes 'Technology Transfer / R&D' and 'Financing' tags.
- ATTACHMENTS:** A table with columns 'Description' and 'File'. It lists two files: 'S1_Revised.pdf' and 'Annex_E.pdf', each with a red 'x' icon for removal. An '+ Add attachment' button is in the top right of this section.
- Buttons:** A 'Go back' button is at the bottom left, and a green 'Submit' button is at the bottom right, highlighted with a red rounded rectangle.

Step 8

You have just submitted your inquiry!

Please wait for an update either on your registered email address. You may also check for updates on your inquiries through the BOSS app.

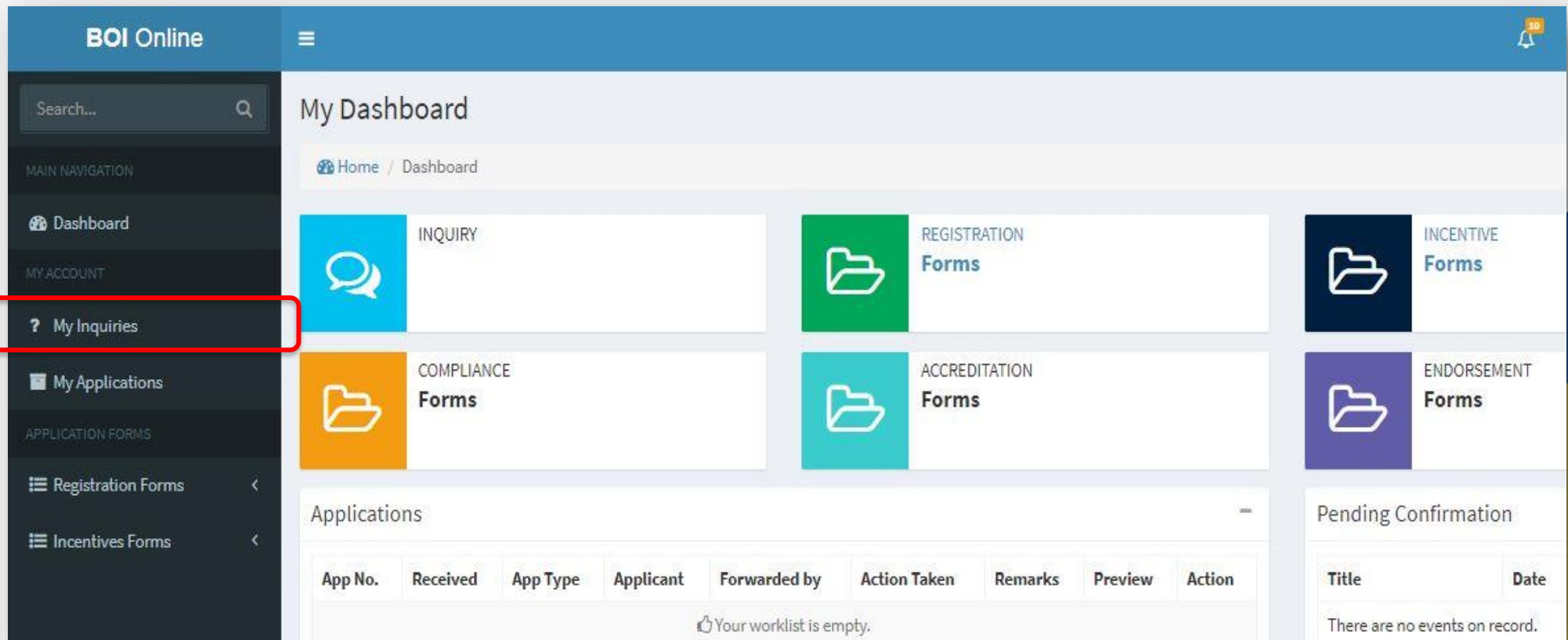




Checking the Status of a Submitted Inquiry

Step 1

Click on the **My Inquiries** link on the navigation on the left.



The screenshot shows the BOI Online dashboard interface. The left navigation menu is visible, with the 'My Inquiries' link highlighted by a red rectangle. The main content area displays a 'My Dashboard' with several tiles for 'INQUIRY', 'REGISTRATION Forms', 'INCENTIVE Forms', 'COMPLIANCE Forms', 'ACCREDITATION Forms', and 'ENDORSEMENT Forms'. Below these tiles is an 'Applications' table with columns for App No., Received, App Type, Applicant, Forwarded by, Action Taken, Remarks, Preview, and Action. The table is currently empty, with a message 'Your worklist is empty.' displayed below it. To the right of the Applications table is a 'Pending Confirmation' section with columns for Title and Date, also showing 'There are no events on record.'

BOI Online

Search...

MAIN NAVIGATION

Dashboard

MY ACCOUNT

My Inquiries

My Applications

APPLICATION FORMS

Registration Forms

Incentives Forms

My Dashboard

Home / Dashboard

INQUIRY

REGISTRATION Forms

INCENTIVE Forms

COMPLIANCE Forms

ACCREDITATION Forms

ENDORSEMENT Forms

Applications

App No.	Received	App Type	Applicant	Forwarded by	Action Taken	Remarks	Preview	Action
Your worklist is empty.								

Pending Confirmation

Title	Date
There are no events on record.	

Step 2

Click on the **Open** tab.

You may also do a search using the fields at the top of the page.

The screenshot displays the 'BOI Online' interface. On the left is a dark sidebar with navigation options: Dashboard, My Calendar, My Inquiries, My Applications, My Compliances, Registration Forms, Accreditation Forms, Incentives, and Compliance Forms. The main content area is titled 'My Inquiries' and includes a breadcrumb 'Home / My Inquiries'. Below this is an 'Inquiry Search' section with two input fields: 'Type of Inquiry' (containing 'All') and 'Keyword' (containing 'No filter'). There are 'Clear filter' and 'Apply filter' buttons. A summary bar below the search section shows 'Worklist 0', 'Open 1', 'Closed 0', and 'Unsubmitted 0'. The 'Open 1' tab is highlighted with a red box. At the bottom, a green banner with a checkmark icon contains the text: 'You have no inquiries that require action at the moment'.

Step 3

Click on the inquiry you are interested in to view a summary its details.

You may also click on the **View** button to view all the information pertaining to that inquiry.

BOI Online

My Inquiries

Home / My Inquiries

Inquiry Search

Type of Inquiry: All

Keyword: No filter

Clear filter Apply filter

Worklist 0 Open 1 Closed 0 Unsubmitted 0 + New inquiry

[1-JUL-2019] PROVIDENT FOOD CORP Created on: July 4, 2019, 10:41 p.m. View

Step 4

You will see any responses and updates on your inquiry at the lower portion of the box.

The screenshot displays a web application interface for managing inquiries. On the left is a dark sidebar with navigation options: 'My Applications', 'My Compliances', and 'APPLICATION FORMS' (with sub-items: 'Registration Forms', 'Accreditation Forms', 'Incentives', 'Compliance Forms', and 'Endorsement Forms'). The main content area features a search bar with the text 'Keyword' and 'No filter', and buttons for 'Clear filter' and 'Apply filter'. Below the search bar, there are status filters: 'Worklist 0', 'Open 1', 'Closed 0', and 'Unsubmitted 0', along with a '+ New inquiry' button. The main inquiry entry is for '[1-JUL-2019] PROVIDENT FOOD CORP' created on 'July 4, 2019, 10:41 p.m.', with a 'View' button. The inquiry details are as follows:

Inquirer	Geoffroy Gupta
Reference Code	LL9LP1ZM
Content	Sample inquiry
Attachments	None provided

Below the details is a 'Responses' section, which is highlighted with a red rounded rectangle. It contains a single response:

Jul 04, 2019, 10:42 p.m.
Inquiry has been delegated to ASD Account Officer 1



Sending a Reply to Inquiry Responses

Step 1

Any inquiries which are pending action from you will be in your **Dashboard** under the **Inquiries** section.

Note that in the event that an inquiry requires an action on your part, you will be notified via email through your registered email address.

The screenshot displays a dashboard interface. On the left is a dark sidebar with navigation links: Accreditation Forms, Incentives, Compliance Forms, and Endorsement Forms. The main content area is light gray and contains several components. At the top, there are two empty tables: one with columns Control No., Received, App Type, Enterprise, Forwarded by, Action Taken, Remarks, Preview, and Action, and another with columns Title and Date. Below these is a red-bordered box containing an 'Inquiries' section with a table of one row. The table has columns: Control No., Received On, Type, Project, Forwarded by, Action Taken, Remarks, Preview, and Action. The row contains the following data: Control No. 1, Received On July 4, 2019, 11:22 p.m., Type (empty), Project None, Forwarded by ASD Account Officer 1, Action Taken Send reply to client, Remarks Hello Mr. we have received your inquiry but we need you to provide more information. Which agency would you like to register with?, Preview (button), and Action (button).

Control No.	Received	App Type	Enterprise	Forwarded by	Action Taken	Remarks	Preview	Action
👍 Your worklist is empty.								

Title	Date
No events to display	

Inquiries

Control No.	Received On	Type	Project	Forwarded by	Action Taken	Remarks	Preview	Action
1	July 4, 2019, 11:22 p.m.		None	ASD Account Officer 1	Send reply to client	Hello Mr. we have received your inquiry but we need you to provide more information. Which agency would you like to register with?	Preview	Reply

Step 2

Click on the **Reply** button.

The screenshot displays a software interface with a dark sidebar on the left containing navigation items: Accreditation Forms, Incentives, Compliance Forms, and Endorsement Forms. The main content area is divided into two sections. The top section is a table with columns: Control No., Received, App Type, Enterprise, Forwarded by, Action Taken, Remarks, Preview, and Action. Below this table is a message: "Your worklist is empty." The bottom section is titled "Inquiries" and contains a table with columns: Control No., Received On, Type, Project, Forwarded by, Action Taken, Remarks, Preview, and Action. A single row is visible in the "Inquiries" table with the following data: Control No. 1, Received On July 4, 2019, 11:22 p.m., Type (blank), Project None, Forwarded by ASD Account Officer 1, Action Taken Send reply to client, Remarks Hello Mr. we have received your inquiry but we need you to provide more information. Which agency would you like to register with?, Preview (button), and Action (button). The "Action" button, labeled "Reply", is highlighted with a red rectangular box.

Control No.	Received	App Type	Enterprise	Forwarded by	Action Taken	Remarks	Preview	Action
Your worklist is empty.								

Control No.	Received On	Type	Project	Forwarded by	Action Taken	Remarks	Preview	Action
1	July 4, 2019, 11:22 p.m.		None	ASD Account Officer 1	Send reply to client	Hello Mr. we have received your inquiry but we need you to provide more information. Which agency would you like to register with?	Preview	Reply

Step 3

Select the appropriate action from the **Action Taken** field.

Provide your reply in the **Remarks** field.

If there is a need to upload files, you may use the **Attachments** section at the bottom of the page.

BOI Online

Process Inquiry

For Action / Process Inquiry / LL9LP1ZM

Inquiry Ref Code: LL9LP1ZM

Process Responses Satisfaction Survey Inquiry Details Inquiry Attachments Company Profile Project Information User Details

Action Taken -----

Remarks

Attachments (optional)

NOTES:
Maximum filesize is 50MB.
Split files that are greater than 50MB and upload them separately.
Accepted filetypes are pdf, jpg, jpeg, png, gif.

File	Description
<input type="text"/> Select file	<input type="text"/> remove
<input type="text"/> Select file	<input type="text"/> remove
<input type="text"/> Select file	<input type="text"/> remove

[add another](#)

[Cancel](#) [Submit](#)

Step 4

Click on the **Submit** button.

The screenshot shows the 'Process Inquiry' page in the BOI Online system. The page title is 'Process Inquiry' and the breadcrumb is 'For Action / Process Inquiry / LL9LP1ZM'. The inquiry reference code is 'LL9LP1ZM'. The page has several tabs: 'Process', 'Responses', 'Satisfaction Survey', 'Inquiry Details', 'Inquiry Attachments', 'Company Profile', 'Project Information', and 'User Details'. The 'Process' tab is active. The form contains the following fields:

- Action Taken:** A dropdown menu with a dashed line indicating a selection.
- Remarks:** A large text area for entering notes.
- Attachments (optional):** A section with a 'NOTES' box stating: 'Maximum filesize is 50MB. Split files that are greater than 50MB and upload them separately. Accepted filetypes are pdf, jpg, jpeg, png, gif.' Below this are three rows for file uploads, each with a 'File' input, a 'Select file' button, a 'Description' input, and a 'remove' button.
- add another:** A blue button to add more attachments.
- Cancel:** A red button at the bottom left.
- Submit:** A blue button at the bottom right, which is highlighted with a red box.

Closing an Inquiry

Step 1

All requests for closing of inquiry will be under the same **Inquiries** section of the **Dashboard**.

The screenshot displays a dashboard with a dark sidebar on the left containing navigation options: Dashboard, My Calendar, My Inquiries, My Applications, My Compliances, Registration Forms, Accreditation Forms, Incentives, Compliance Forms, and Endorsement Forms. The main content area is titled 'My Dashboard' and includes several action cards: 'CREATE New inquiry', 'VIEW Registration Forms', 'VIEW Incentive Forms', 'COMPLIANCE Forms', 'VIEW Accreditation Forms', and 'ENDORSEMENT Forms'. Below these are two summary tables: 'Applications / Compliances For Action' (empty) and 'Upcoming Events' (empty). The 'Inquiries' section, highlighted with a red box, contains a table with one entry:

Control No.	Received On	Type	Project	Forwarded by	Action Taken	Remarks	Preview	Action
1	July 4, 2019, 11:36 p.m.		None	ASD Account Officer 1	Request permission to close inquiry		Preview	Confirm closing of inquiry Defer closing of inquiry

Step 2

Click on the **Confirm closing of inquiry** button.

Alternatively, you may click on the Defer closing of inquiry if you are not satisfied with the responses you have received for your inquiry.

The screenshot displays a web application interface. On the left is a dark sidebar with navigation options: MY ACCOUNT (My Calendar, My Inquiries, My Applications, My Compliances), APPLICATION FORMS (Registration Forms, Accreditation Forms, Incentives, Compliance Forms, Endorsement Forms), and a search icon. The main content area features several action buttons: 'CREATE New inquiry', 'VIEW Registration Forms', 'VIEW Incentive Forms', 'COMPLIANCE Forms', 'VIEW Accreditation Forms', and 'ENDORSEMENT Forms'. Below these are two tables. The first table, 'Applications / Compliances For Action', is empty with the message 'Your worklist is empty.' The second table, 'Inquiries', contains one entry with the following data:

Control No.	Received On	Type	Project	Forwarded by	Action Taken	Remarks	Preview	Action
1	July 4, 2019, 11:36 p.m.		None	ASD Account Officer 1	Request permission to close inquiry		Preview	Confirm closing of inquiry Defer closing of inquiry

Step 3

Fill up the Satisfaction Survey then click on the **Save** button.

BOI Online

My Dashboard

Confirm closing of inquiry

Service Quality

Satisfactory

Outstanding

Very Satisfactory

Below Satisfactory

Poor

Employee Engagement

Satisfactory

Outstanding

Very Satisfactory

Below Satisfactory

Poor

Timely Rendition of Service

Satisfactory

Outstanding

Very Satisfactory

Below Satisfactory

Poor

Do you have comments/suggestions?

Place your comments and suggestions here

Cancel Save

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Thank you

