CLIENT USER'S MANUAL- FOR INQUIRIES

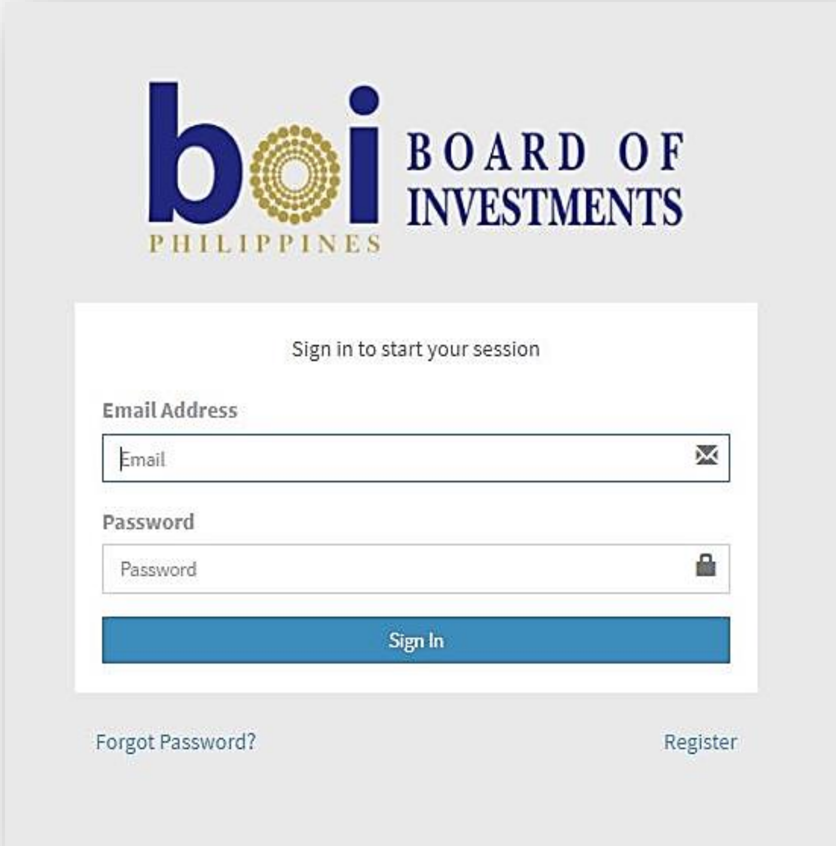
User's Manual

Board of Investments Online Services and Investment Leads and Monitoring System

Creating an Inquiry

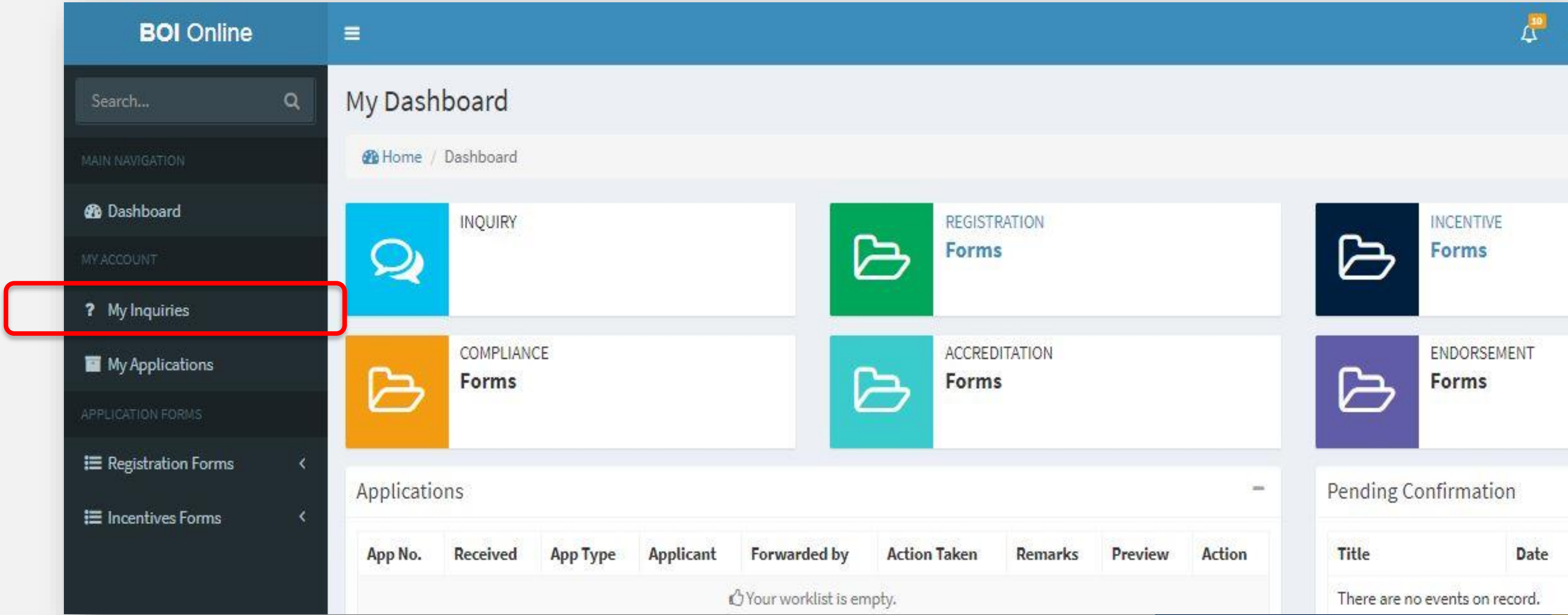
Step **1**

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



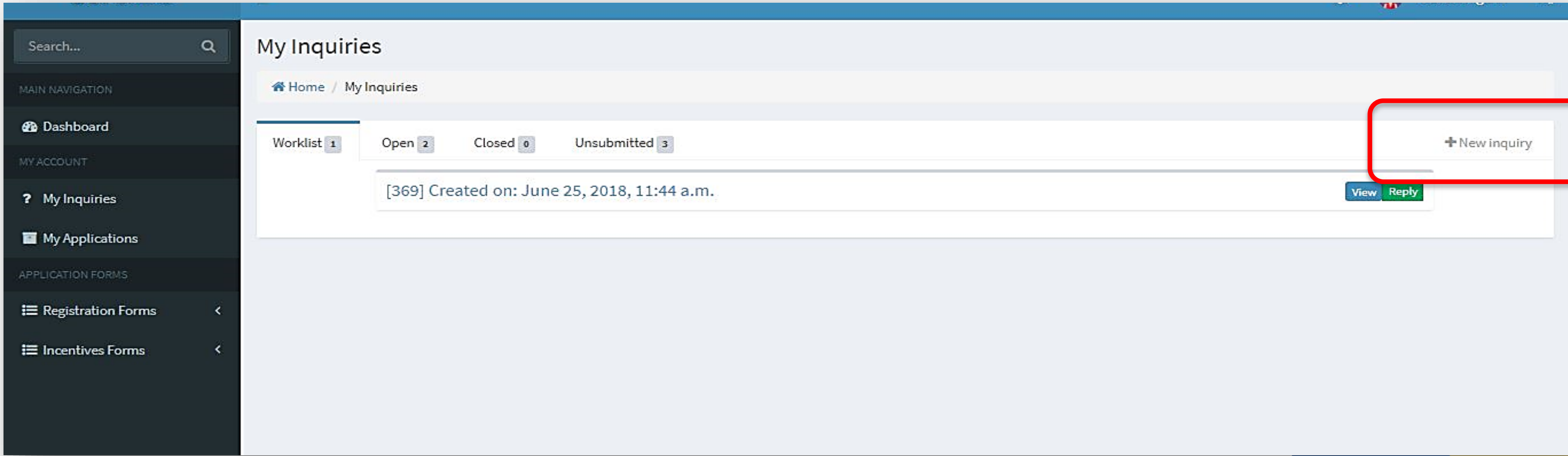
Step **2**

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



Step 3

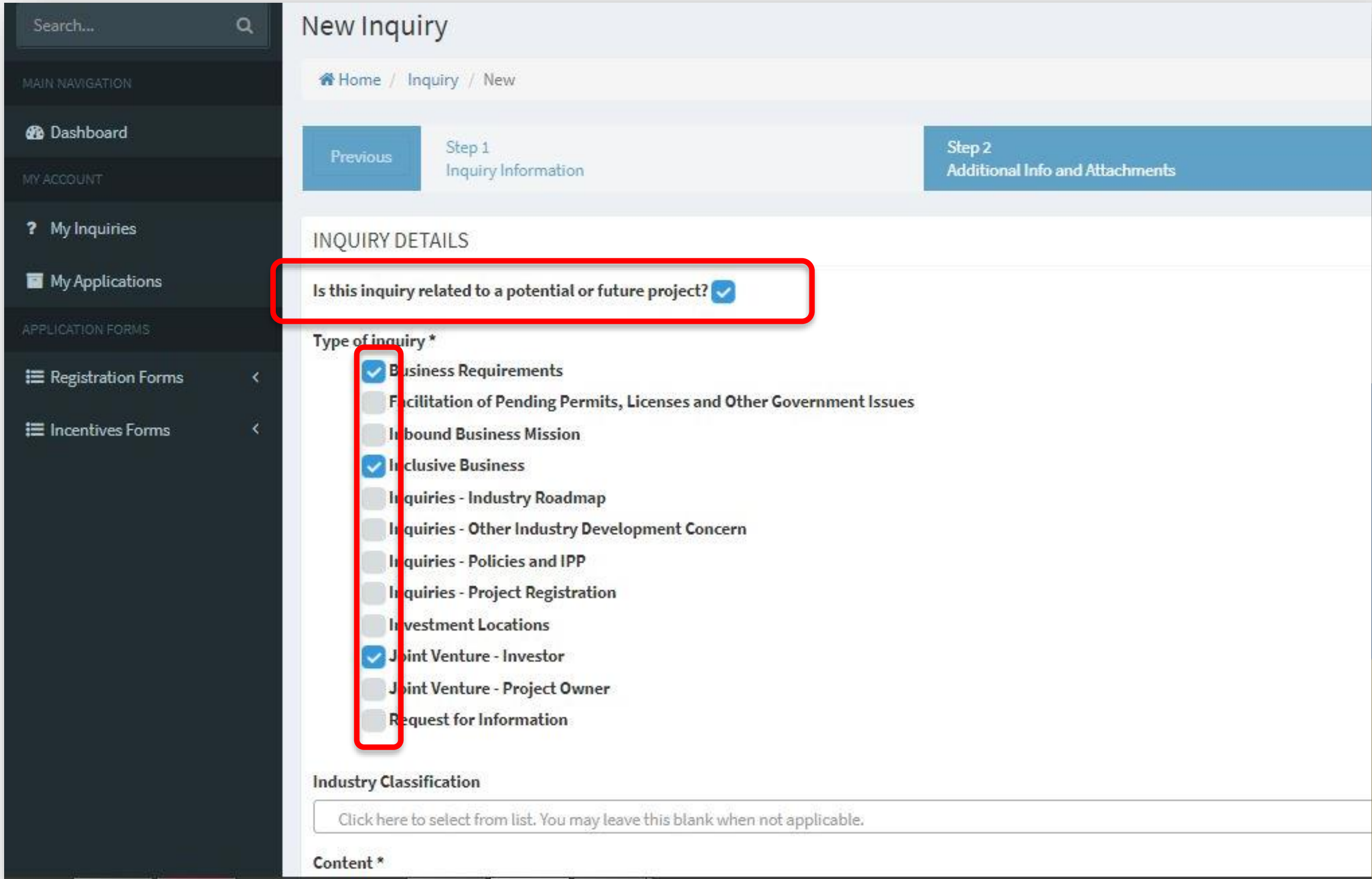
Click on the **New Inquiry** button.



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.

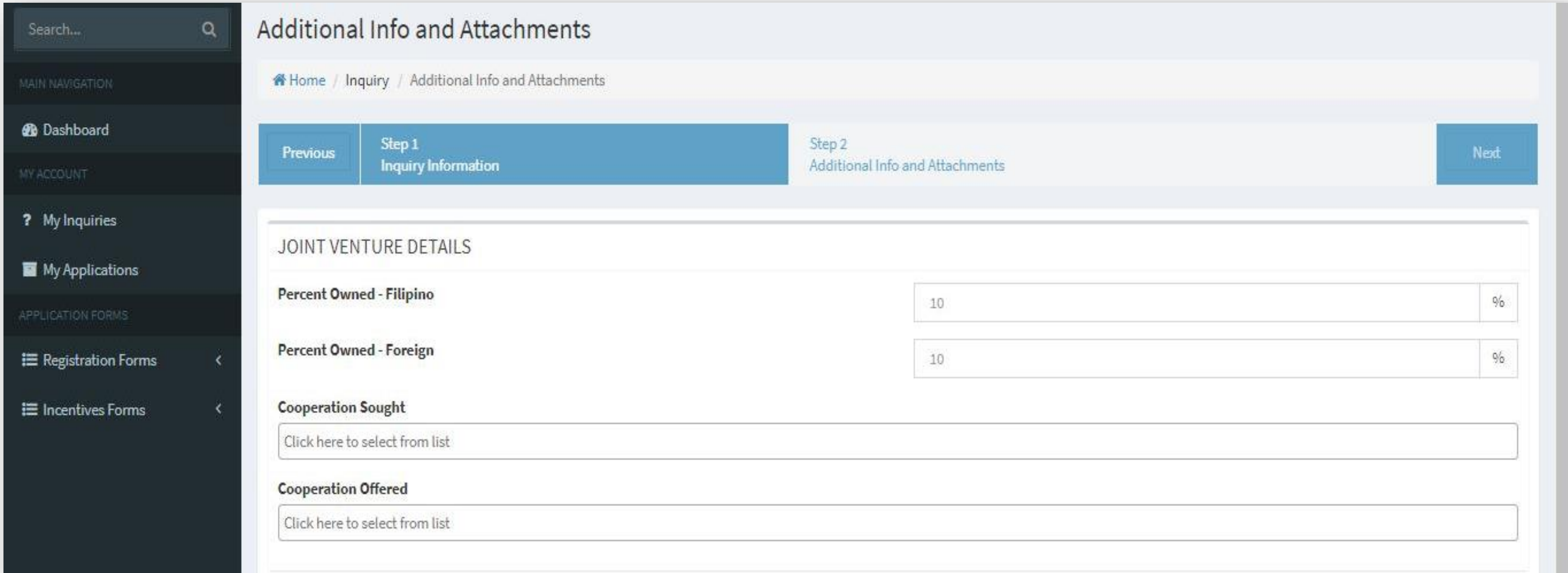
Fields with asterisks (*) are required fields



Step **5**

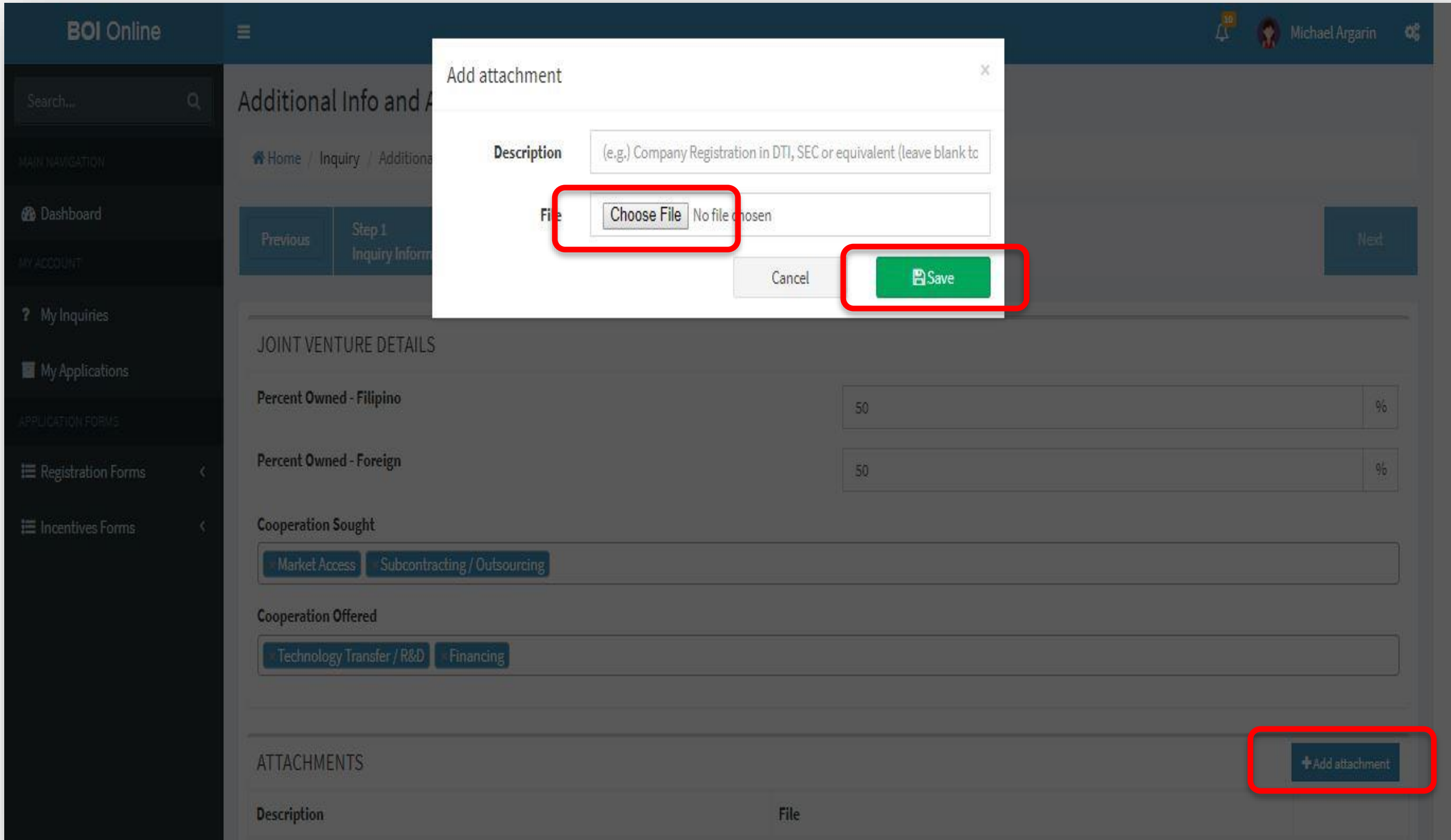
Fill in all the necessary fields in the form that appear. Please note that the fields that would appear on this step are dependent on the Types of Inquiry that you've been selected in Step 1.

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



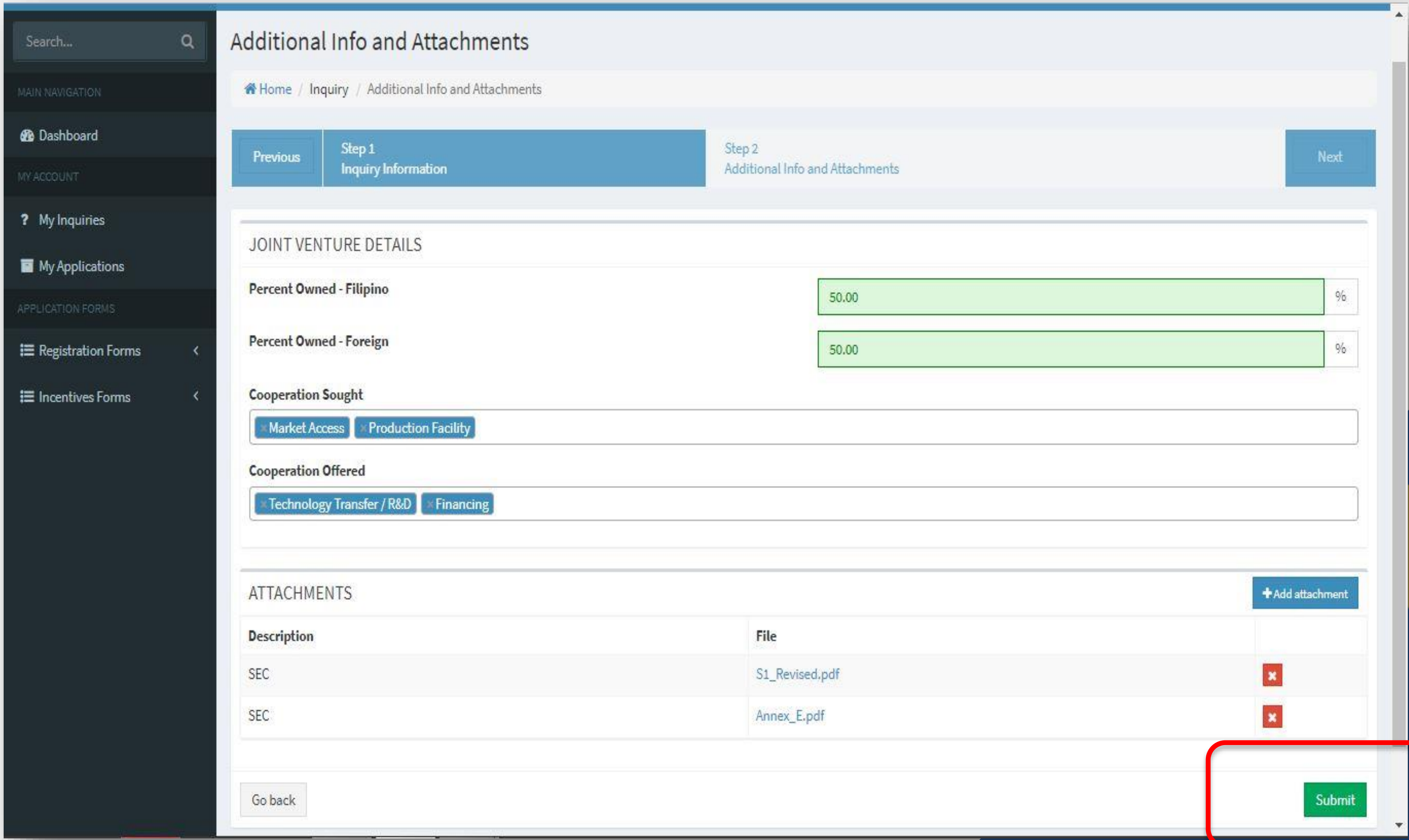
Step **6**

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.



Step 7

Click the **Submit** button.



Step **8**

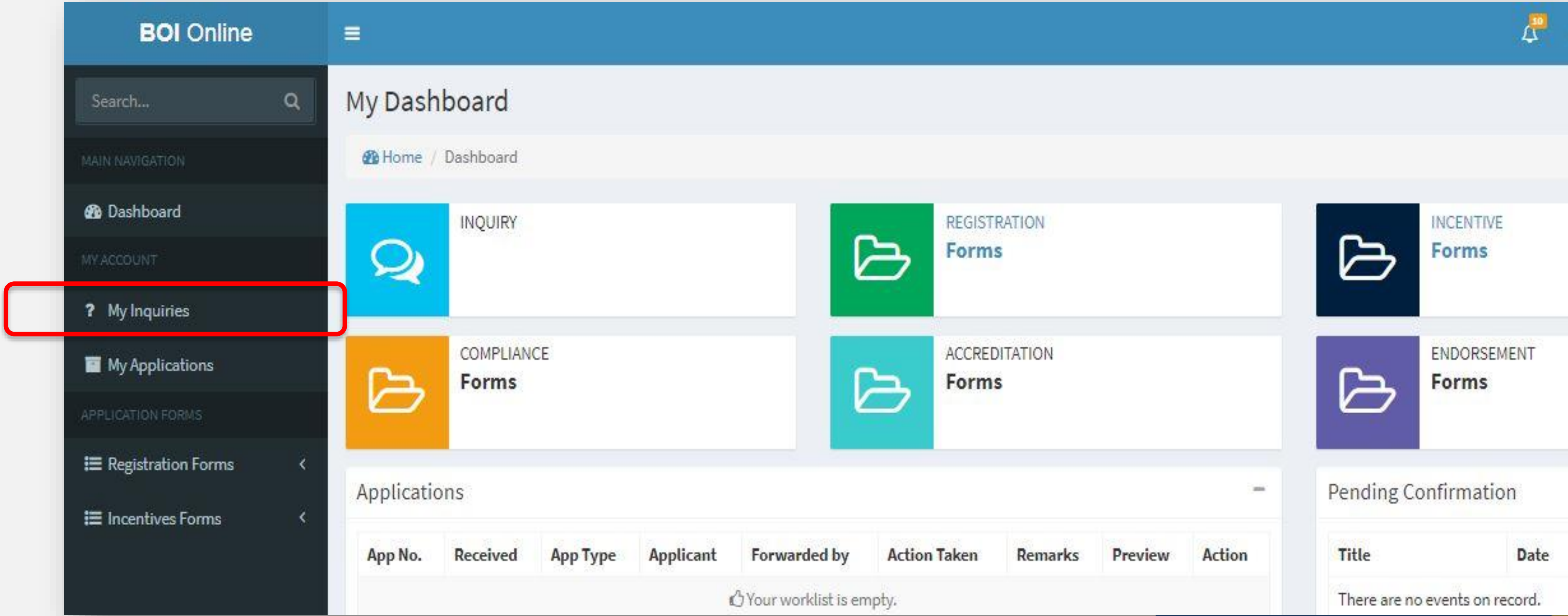
You have just submitted your inquiry!

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

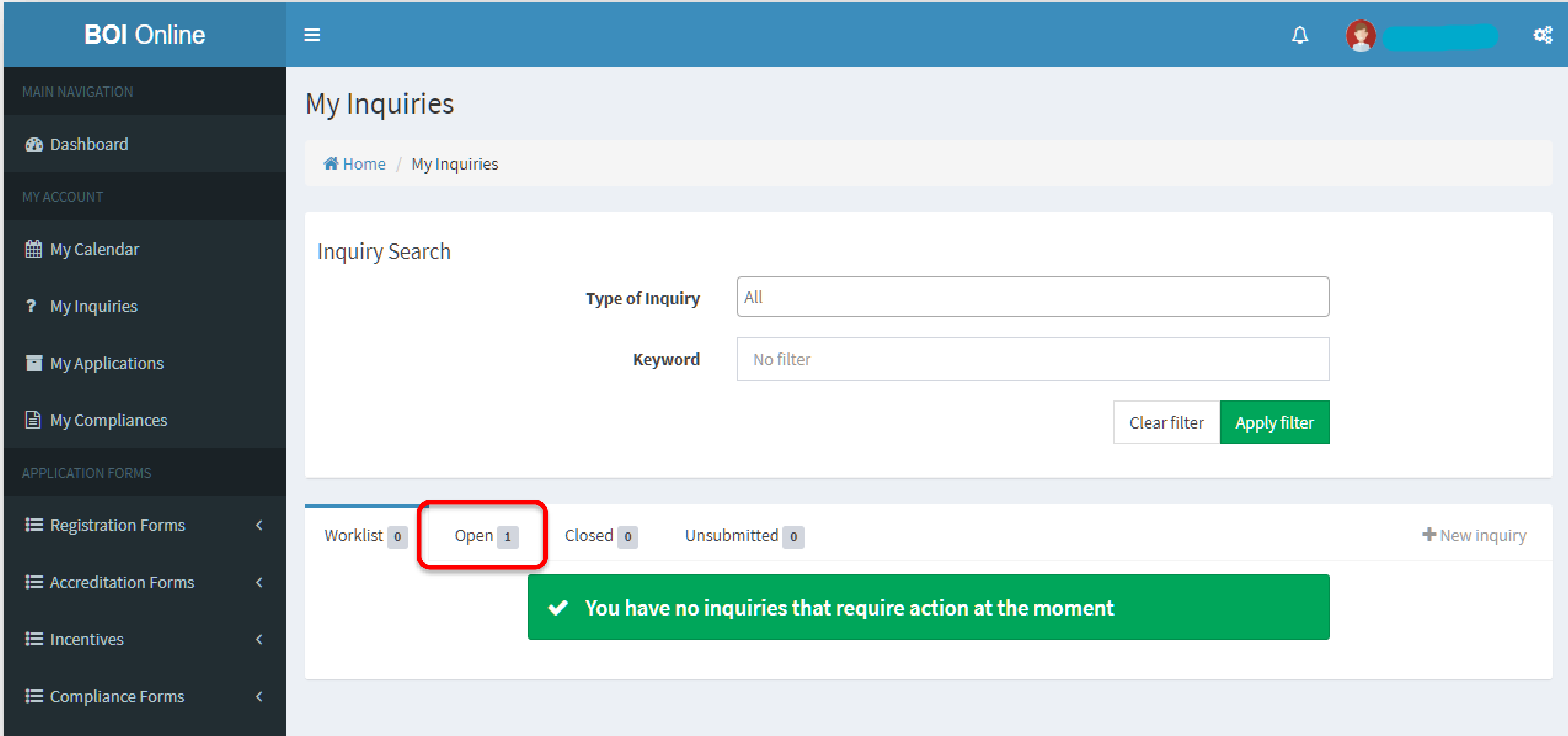
Click on the **My Inquiries** link on the navigation on the left.



Step 2

Click on the **Open** tab.

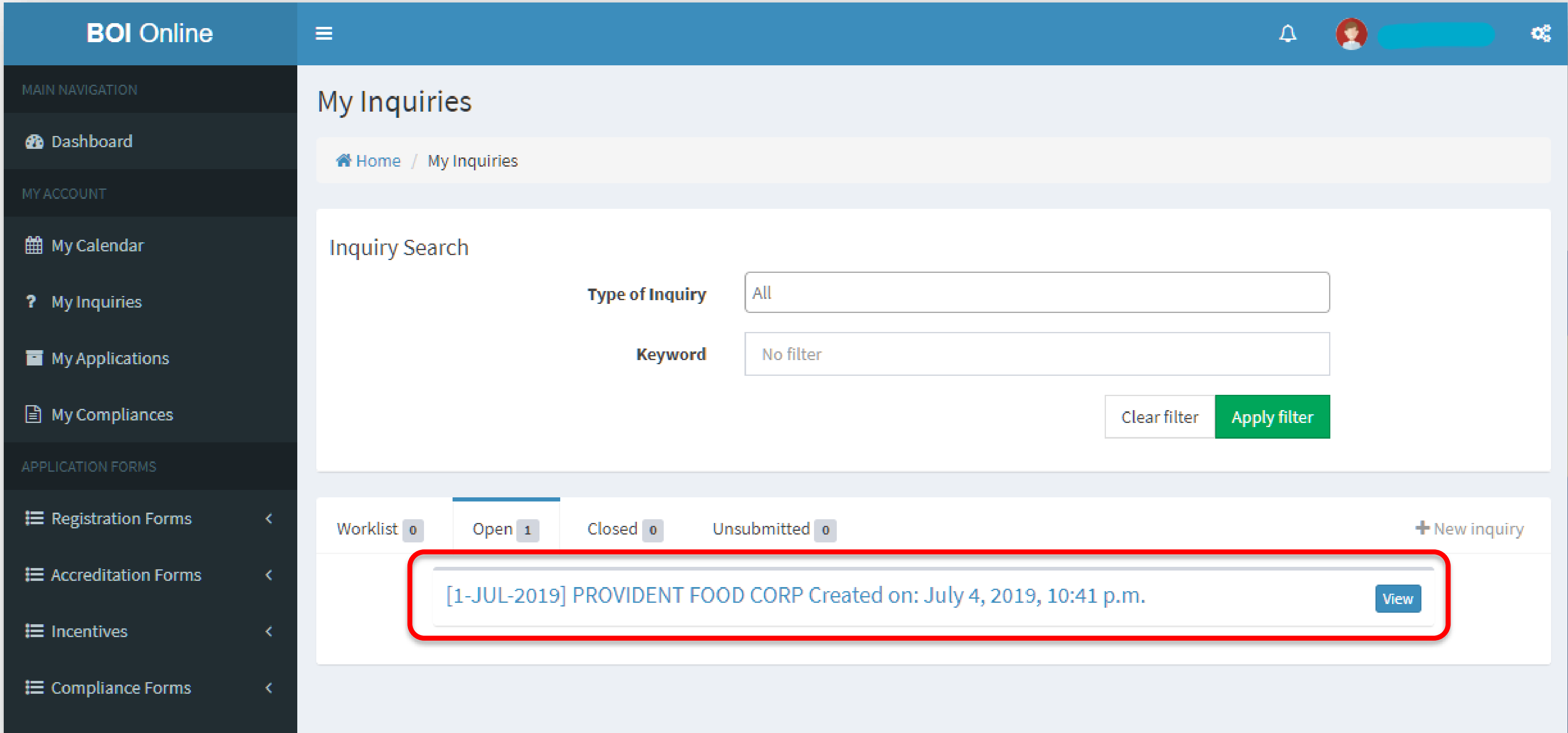
You may also do a search using the fields at the top of the page.



Step **3**

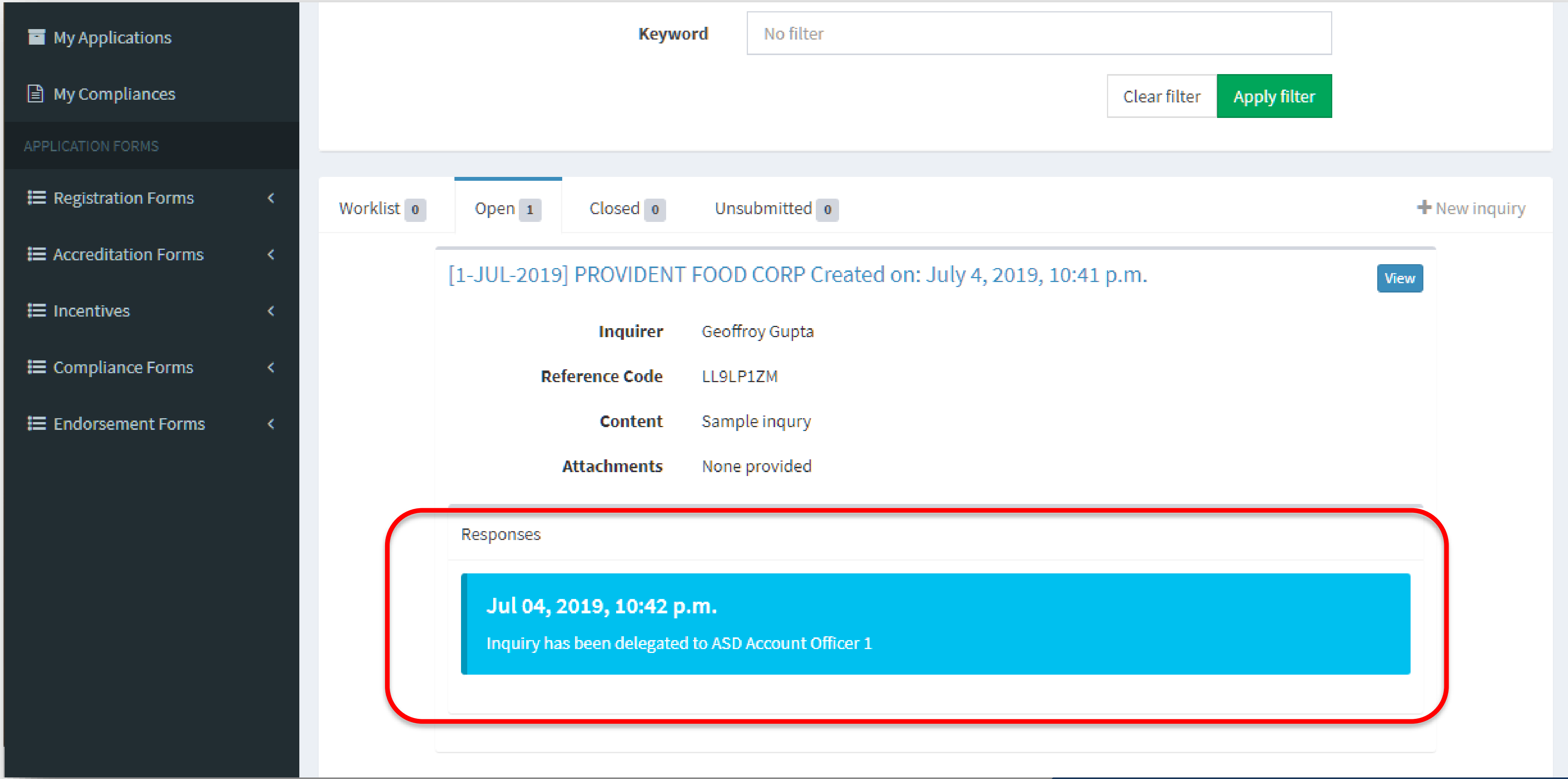
Click on the inquiry you are interested in to view a summary its details.

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



Step 4

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

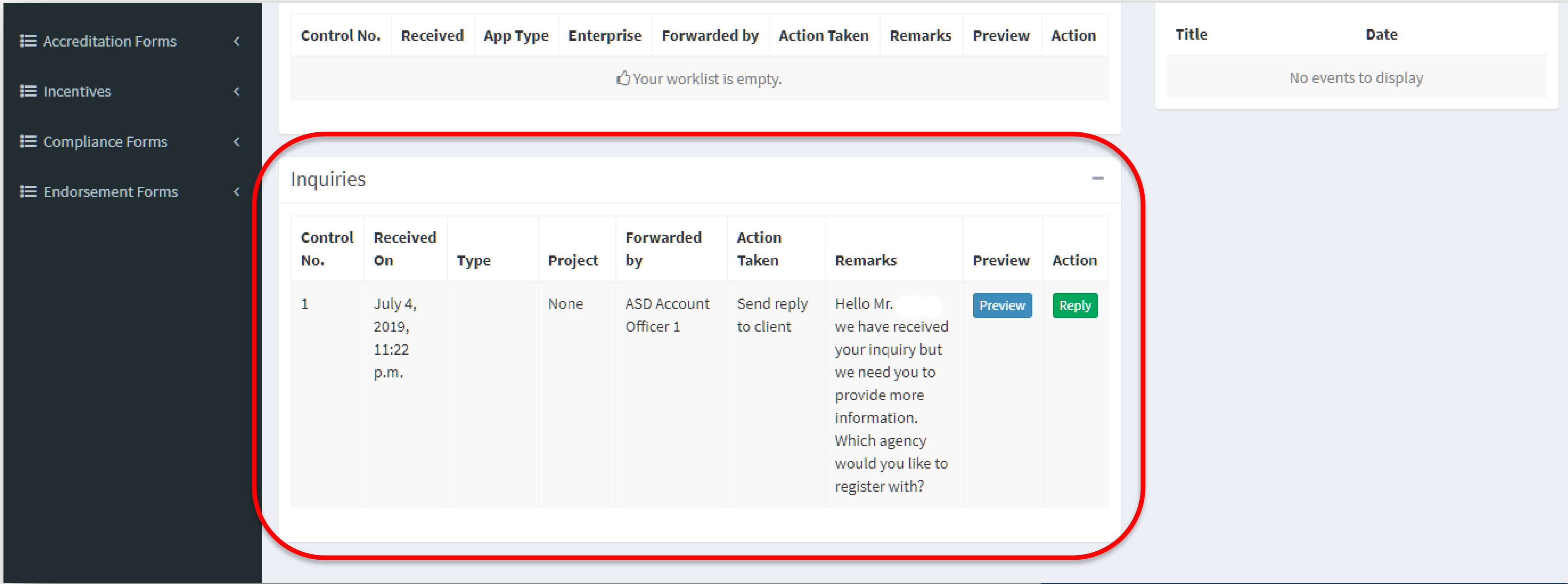


Sending a Reply to Inquiry Responses

Step 1

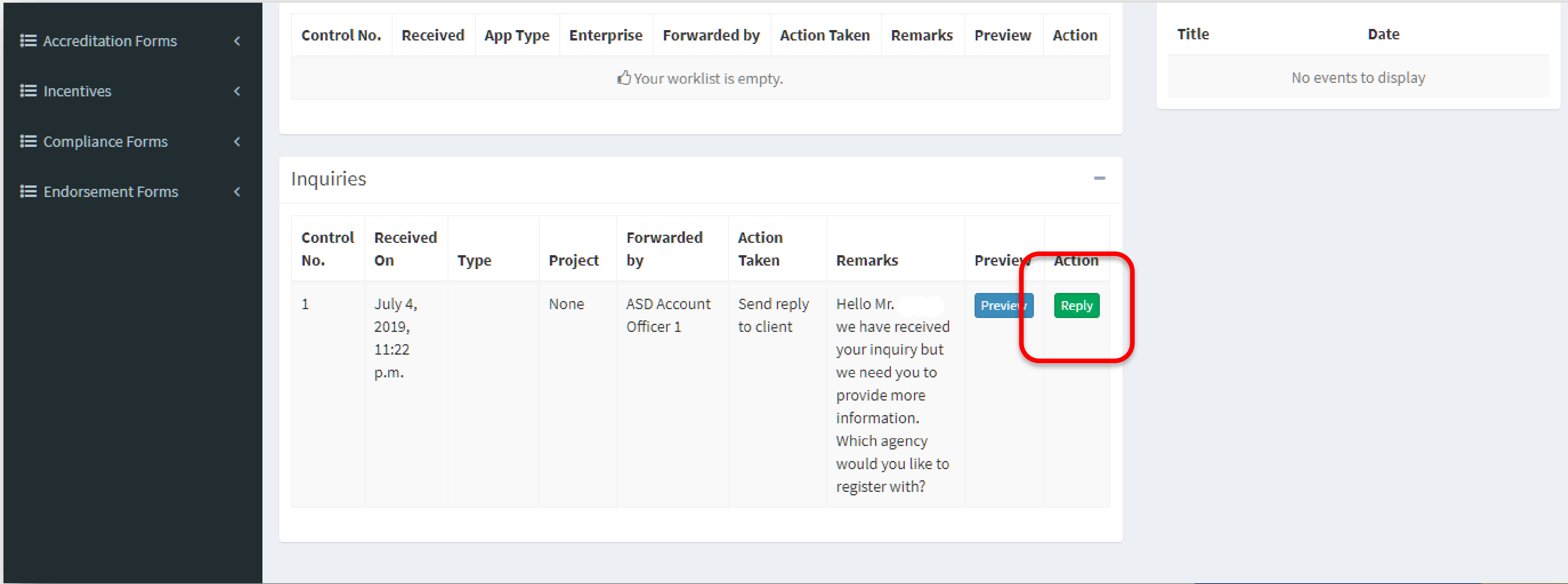
Any inquiries which are pending action from you will be in your **Dashboard** under the **Inquiries** section.

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.



Step 2

Click on the **Reply** button.

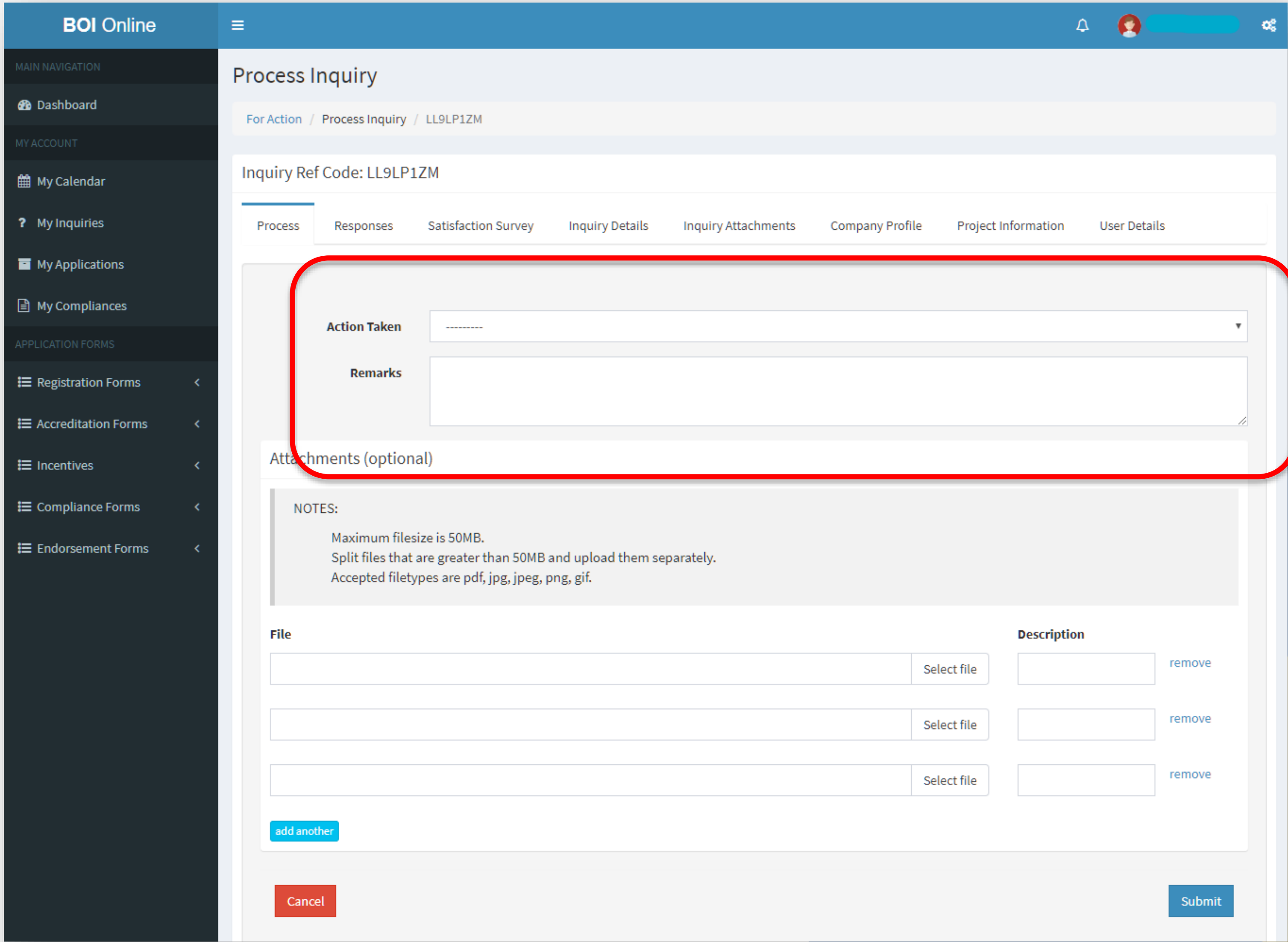


Step 3

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

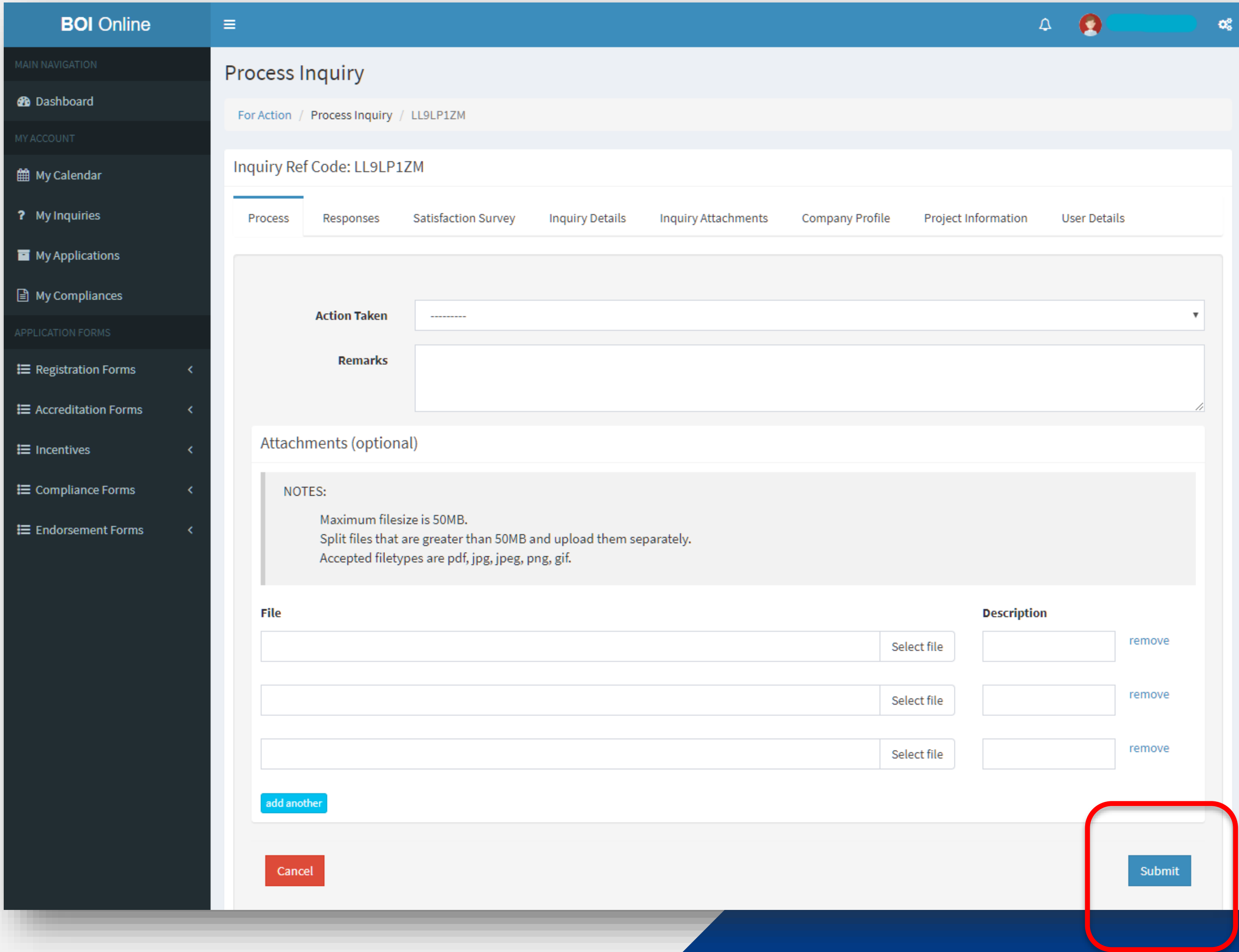
Provide your reply in the **Remarks** field.

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



Step 4

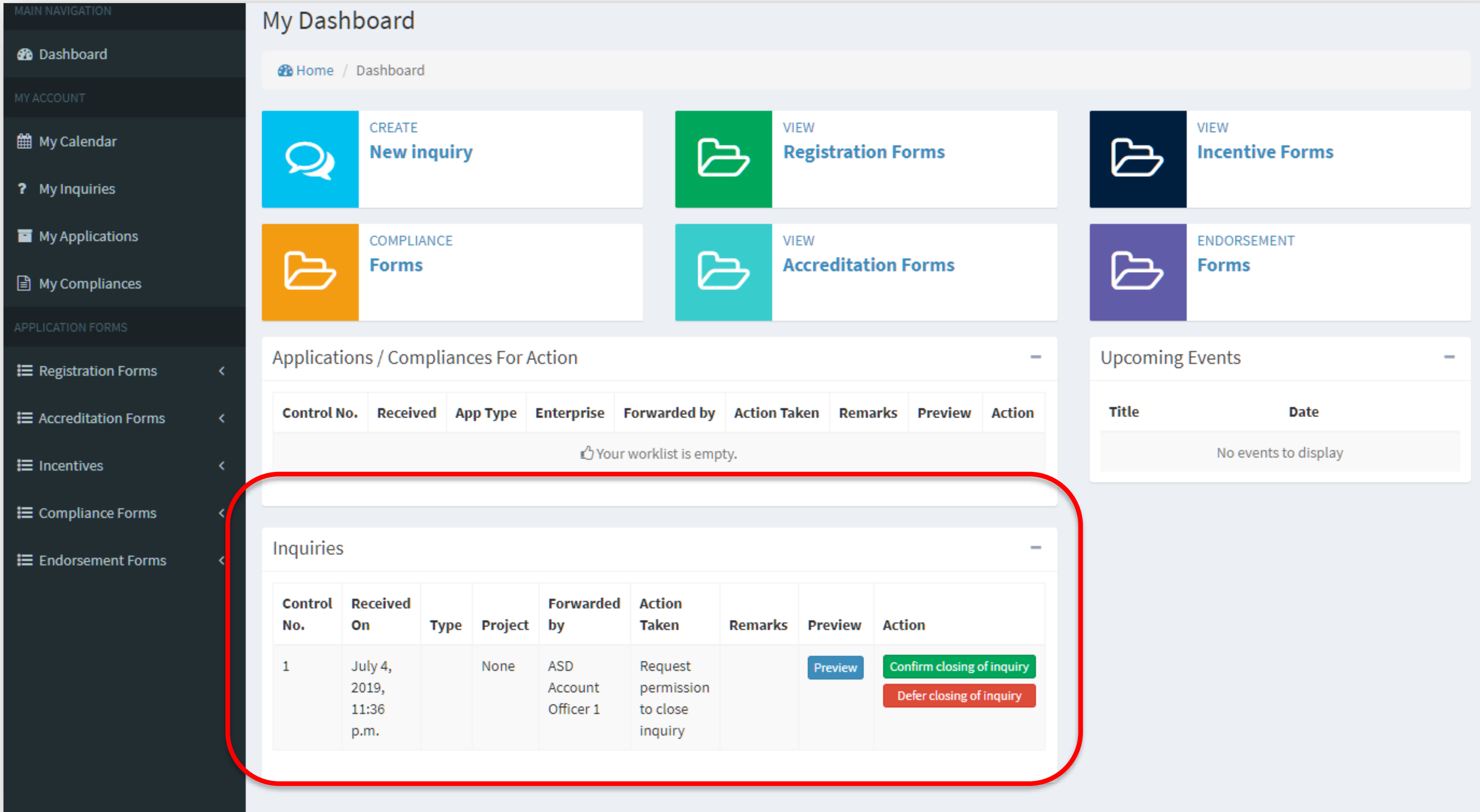
Click on the **Submit** button.



Closing an Inquiry

Step 1

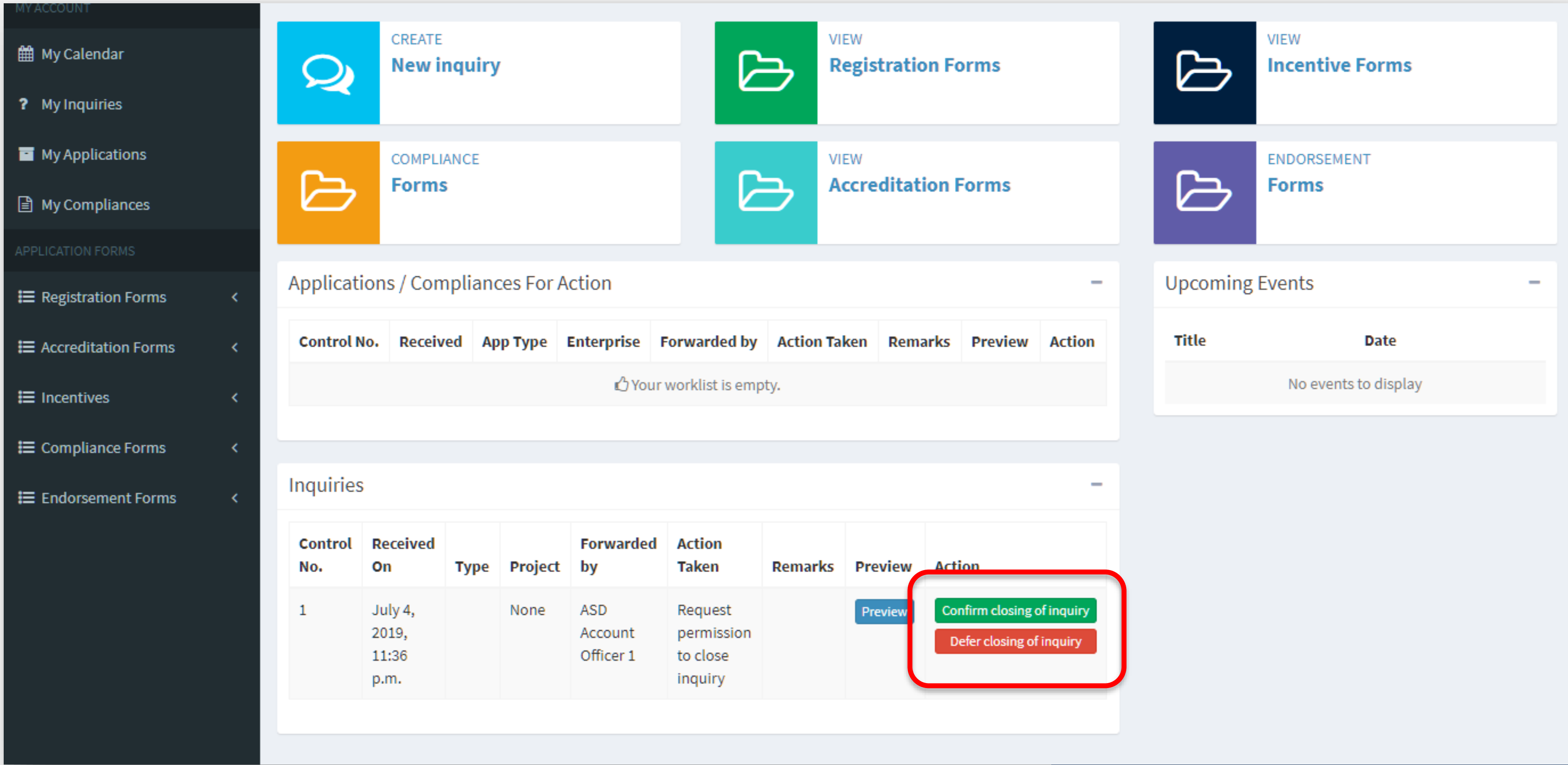
All requests for closing of inquiry will be under the same **Inquiries** section of the **Dashboard**.



Step 2

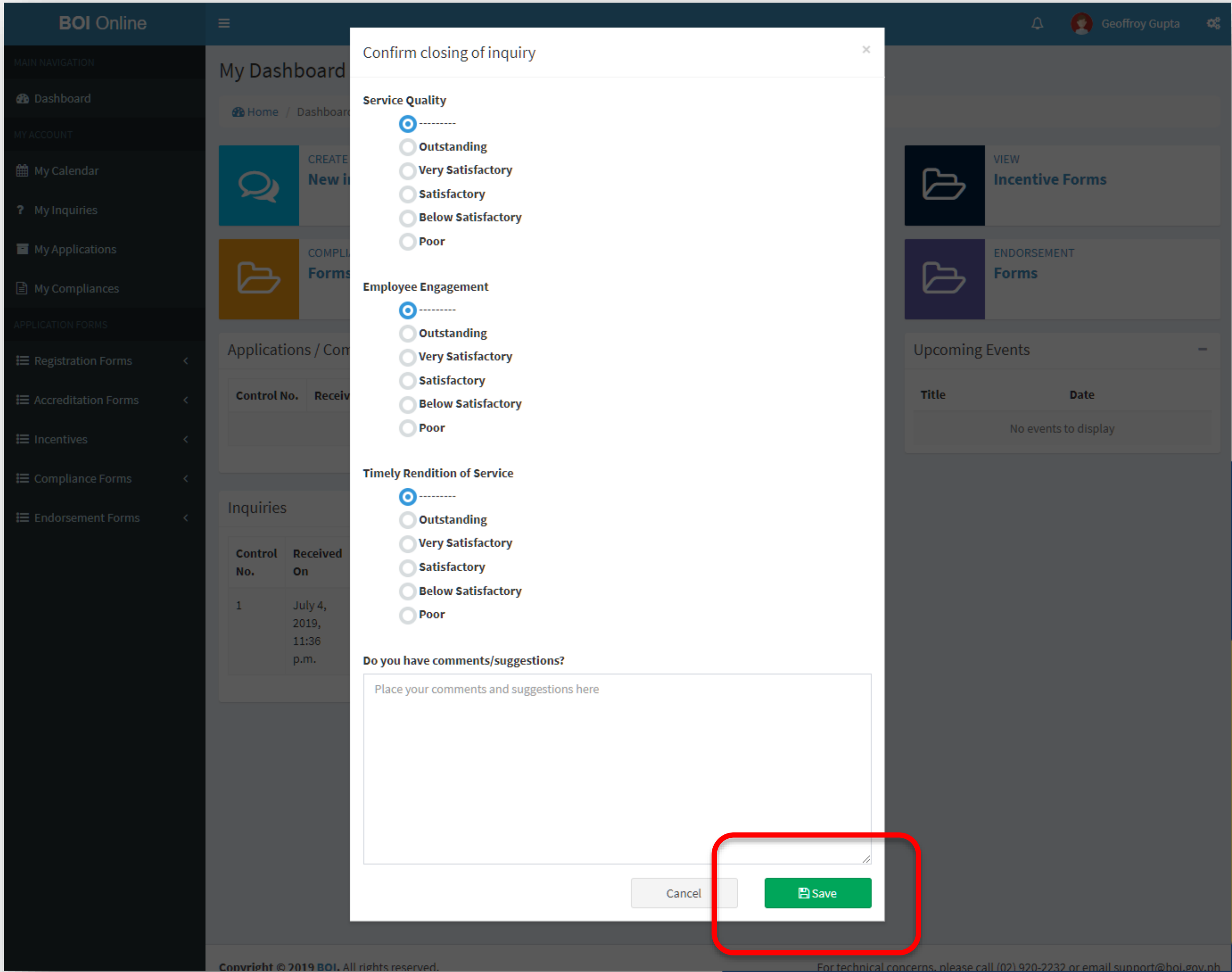
Click on the **Confirm closing of inquiry** button.

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



Step 3

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



Thank you