

## PLClients General Help

Every PLClients page has the following elements in it

### HEADER

The header has the PL logo, active client selection drop down, Links to Dashboard & the 4 sections and Account, Notifications, Feedback & Logout icons

### BODY

This part contains the main information of the page. Every page has a help icon to help users understand the information and features in the page.

### SECTIONS

All information on the site is divided into 4 sections. Each section has a search box where you can search for whatever information they are looking for. All sections will be in expanded mode on the Dashboard page and closed mode on every other page. Client can enter a keyword to search or expand the section by clicking the + icon.

The order of reports seen in the Reports section is based on # of times each report was accessed by login user in the last 30 days. For all other sections it is based on global access by all clients in the last 30 days.

**Reports** - contains information reports that a client can see regarding their account with PL.

**Documents** - contains product information documents / presentations and offline forms that clients need to print, fill, sign and submit to PL.

**Products** - gives the client an introduction to all products & services offered by PL. For some products the client can even enrol online & transfer funds thru the payment gateway.

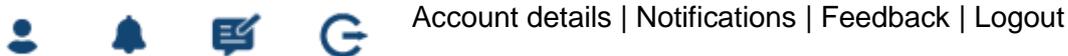
**Forms** - contains a link to all online forms that a client can fill & submit online.

### FOOTER

This section contains statutory and other useful information for the client.

### ICONS

These are the icons used on the site



Account details | Notifications | Feedback | Logout



Refresh dashboard | Edit dashboard | Information (Alt + I)



Add Cards to dashboard | Save dashboard



Export report to file | Information (Alt + I)



Filter (Alt + Y)