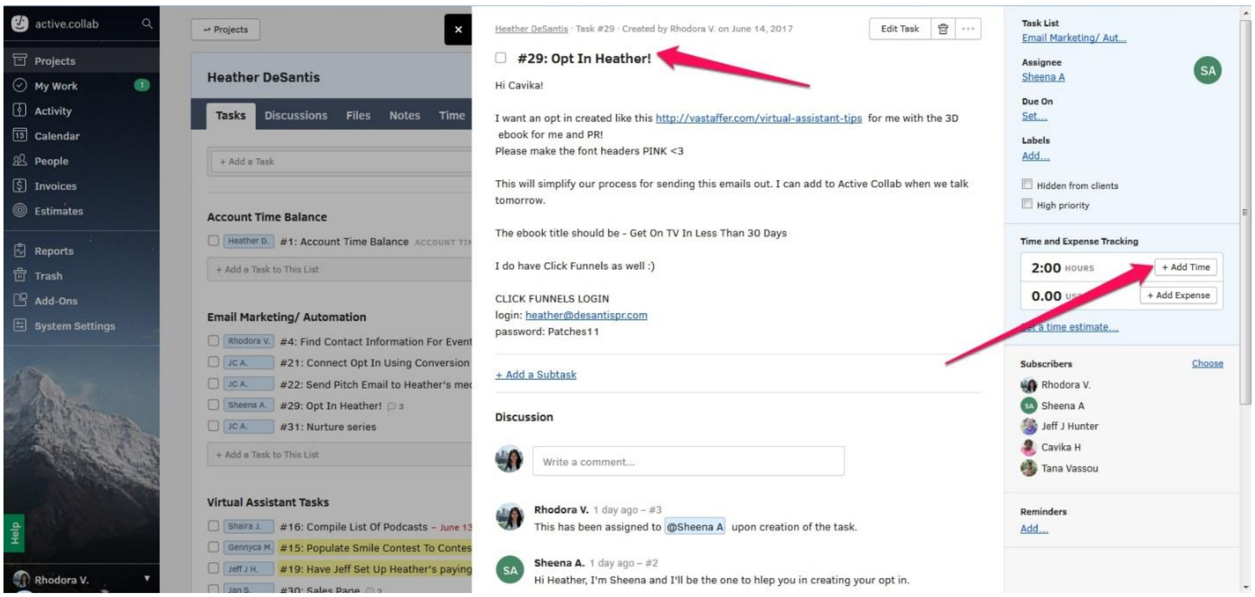
-**How to record time and task at the Account Time Balance of the client's PMT also known as <u>Project Management Tool</u>**.

1. First, log in to your account on the PMT you should be invited with a link sent to your email to create your profile and set your password.

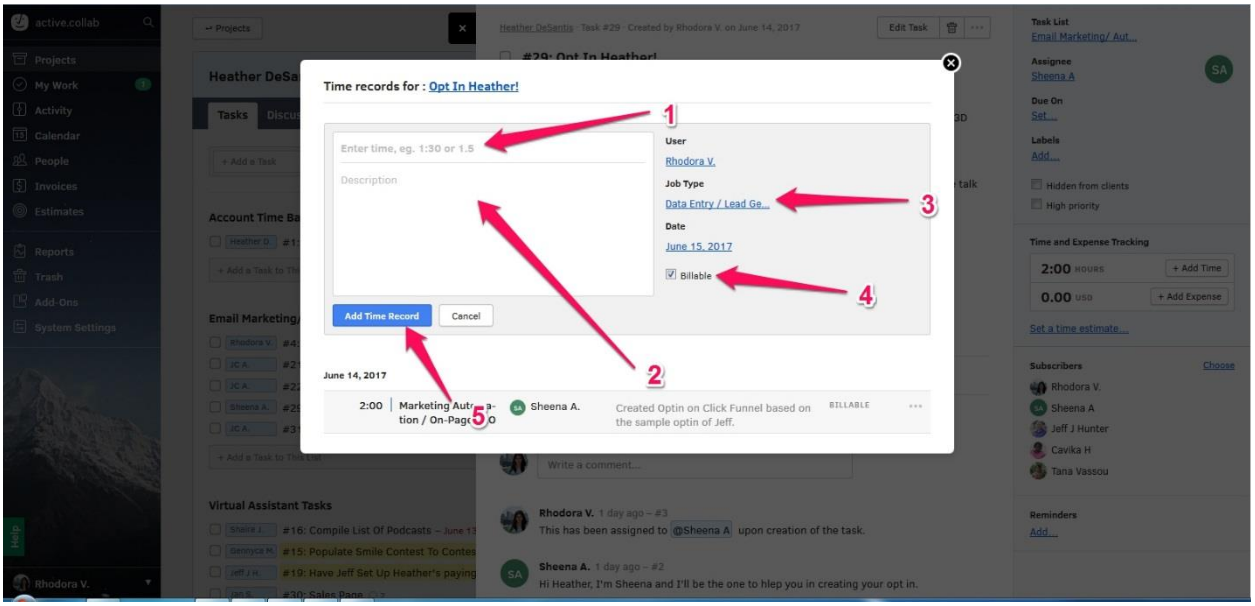
2. In your Home screen you will be able to see menus at the top is 'PROJECTS' click it, then click your 'CLIENT's PROJECT' and then 'TASKS'.

3. Usually a client may have lots of different tasks so you need first to look for the task that was assigned to you, once you find it click on it.

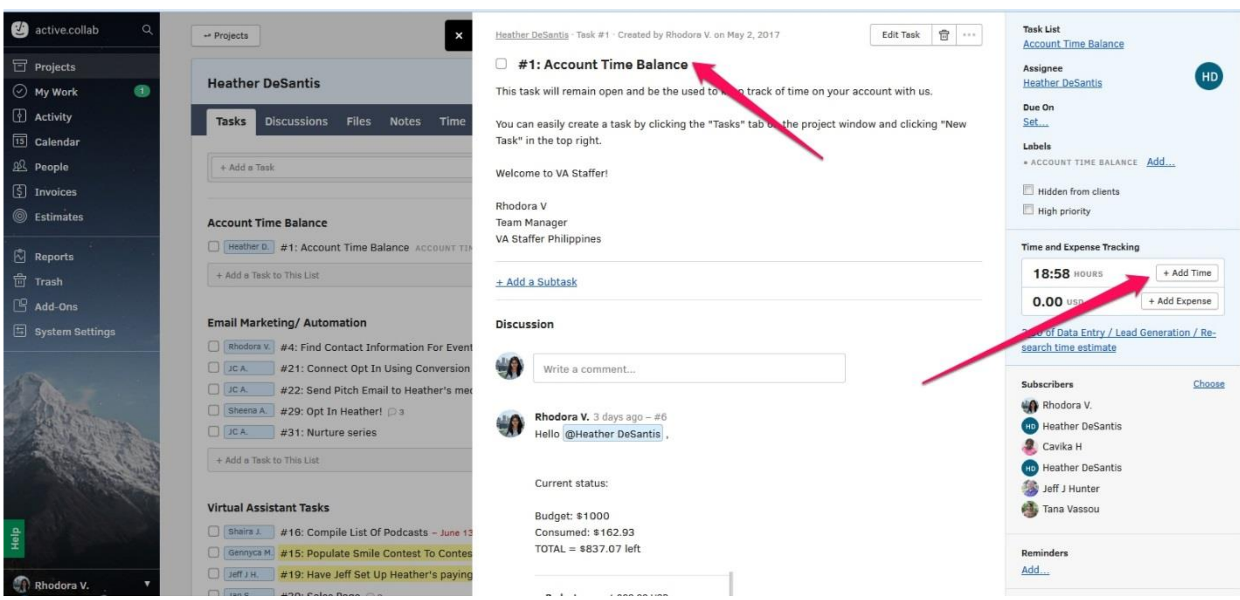


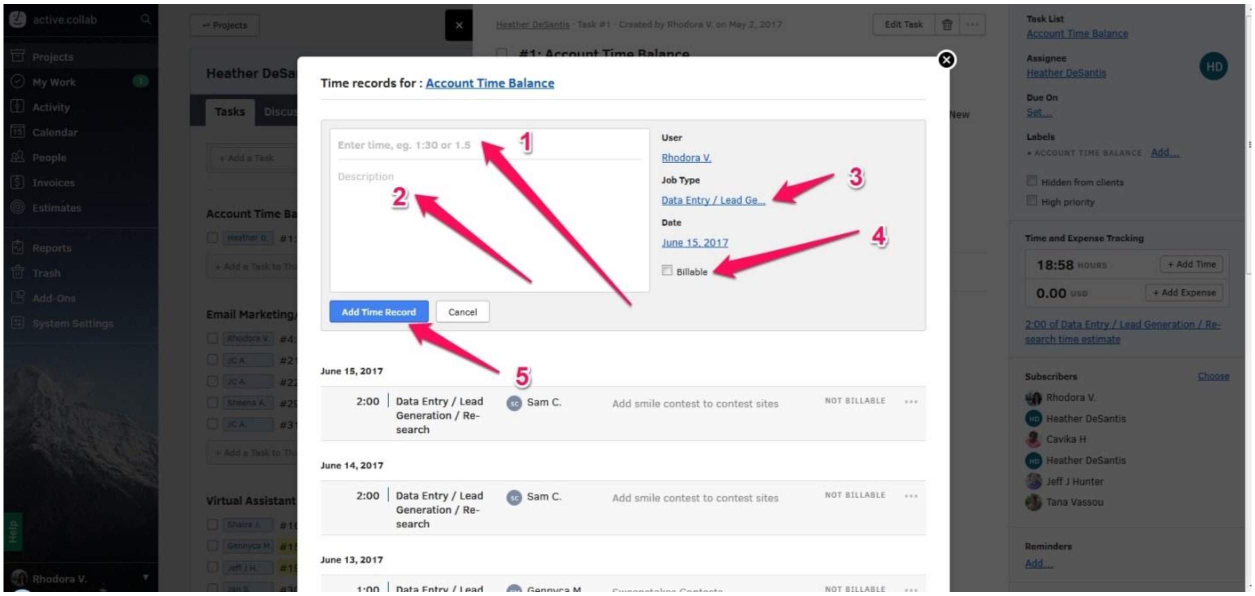
4. Inside the client's task you will be able to see all the instructions of that task, also you will see the time and expense tracking at the right side of your screen. The time and expenses will tell you how many hours does the client allow you to work on that task or estimated time but it depends for some clients they just leave it zero means the client will leave it to you how many hours you need to finish the tasks.

If for example the client gives 3 hours for a task in the time and expenses, and you are about to consume the time allotted by the client but you are not yet done with the task always notify them by leaving a comment, after that click on the 'Time and expenses' record the hours consumed or the value, then the name of the task or summary, and then the status- click on the dropdown menu and choose if it's not billable and billable then click add.



5. After recording the hours consumed in the 'Time and expenses' on the task itself don’t forget to record it in the **Account Time Balance** of the client, click on it. Once you click on it, it will bring you to the ‘Account Time Balance Task page, record again the hours consumed in the time and expenses located on the right side. Make sure the time recorded on the Account time balance is not billable or uncheck the billable radio button because the client will be charge twice if you make it billable. Don’t forget that!





- **How to make a report/s for the clients about their task.**

Below are the key points to remember.

*What exactly the task is?

*What problem/s have you encountered in doing the task?

*How did you finished/ accomplished the task?

*How many hours did you finish the task? /Reason why it took you too long to accomplish the task.

1. We will be providing you the template for all the reports that you will be doing. On your reports, you have to tell the client what is the detailed procedure on how you did the task, you can paste images or screenshots for their reference.

-How to make comments?

*Our task is not just to do the task properly, but also to update the clients about the flow of how we are going to the task.

* We need to acknowledge, update and give them assurance that the task they've made were in good hands. So, we must make comments.

* Also, when there is something you are not sure with the task; don't hesitate to ask the client by leaving a comment and wait for the client's reply before proceeding with the task.

1. When you are on the certain page of the task, you will see below 'WRITE A COMMENT'.

2. That's the proper place to make a comment. A simple yet direct word for the client about your task would do.

3. When you need to attached some files on the comment, at the bottom of the 'Comment Box' was the 'ATTACHED FILES' button, and then choose a file that you will attach and then Hit the 'ADD COMMENT' button and it will automatically include in your comment.

How to:

-Updating Profile Picture on the PMT

*Pictures must be updated and professional.

1. At the bottom of your page on the left side corner, if without picture, you will see an avatar profile picture. Click that Icon.

2. You will see another window; Click again the avatar picture.

3. Then, Click the 'UPLOAD NEW PICTURE'. Choose your best updated and professional looking picture. It will successfully posted and saved on your PMT.

-Reminder/s

*A VA can make reminders for himself/ herself or to the other VA's.

* Here are steps:

1. First select the project – and then the task that you want to be remind others all yourself.

2. Then check your screen at the lower right side you will see the word "Reminder" that has hyperlink.

3. Click 'Reminder'

4. There you will see another window, and then you can choose whether you want to set a Reminder for you or for the other VA's.

5. Set the Time.

6. Lastly, Hit the 'Save' Button.

-Slack

*VA's MUST HAVE. You will be invited to team's slack account and you will be prompted to create your profile and password.

-How to use <u>WEBMAIL</u> and <u>LASTPASS</u>?

WEBMAIL

(Vastaffer.com/webmail)

It is very necessary to have your mail and check it all the time, because it's like your newspaper. And your email is very important because all your notifications from PMT, updates from Worksnaps, Lastpass and other tools that you will be using in VA Staffer are connected to your company email.

Here's the step-in logging into webmail.

1. First, Visit your domain.com (vastaffer.com/webmail). Be sure to replace your domain.com with your actual domain name.
   Example: kharla@vastaffer.com
2. Enter your username and password, and then click OK. User Name: Enter your full email address, all lower case.
3. You should now be logged in!

LASTPASS

*It was used for generating, sharing without knowing other people's password and also securing passwords. It's like a Master account of all your accounts. You can store on Lastpass every login credentials of all your accounts.

1. The first thing you need to do is to get yourself a free LastPass account. Go to the LastPass.com. Install and download the extention or add ons to your browser.
2. Create an Account or Login.
3. Check the web browsers you want to install LastPass on. The advanced options gives you more control over the specific aspects of those browser installs; skipping the advanced section is fine for most users.
4. Type in your master email address and select your master password. You'll only be using this password to access your Lastpass vault and to login once every browser session to the local database. Password should be a combination of character and numbers instead of a simple password. Example: aPpLe20151520
5. Next step, it would ask you to choose which items you want to import into LastPass.
6. We're almost done! The last setup step is to specify whether or not LastPass should log you out when the browser closes and whether or not you're LastPass Vault should be your homepage. We recommend setting it to log you out and not using your vault as your homepage.

7. After you finish the LastPass installation, go to web browser. In the toolbar of the browser will be a dark LastPass icon (which looks like an asterisk). Login using your email and LastPass password. We let LastPass remember our login but leave the password blank. Once you login the LastPass logo should switch from dark gray to red and white.
8. Clicking on the logo yields a drop-down menu filled with LastPass goodies. The first thing we want to do is hit up the Preferences menu. Click on it now.
9. From this point forward LastPass will automatically detect when you're visiting a website that you've already created a login for and will prompt you to generate a secure password for new web sites you're joining.
10. When you create a new account for a web service, LastPass will prompt you to generate a secure account. In the screenshot below we started the signup process for a Yahoo! Mail account. When you click the generate button LastPass will open a new tab with the password generator.

11. There you can set your password length, accepted characters, and other parameters. You can accept the password or generate a new one with new variables until you're satisfied. When you hit accept LastPass will automatically fill it in for the site (and remember it on your behalf).

How to Share your Lastpass?

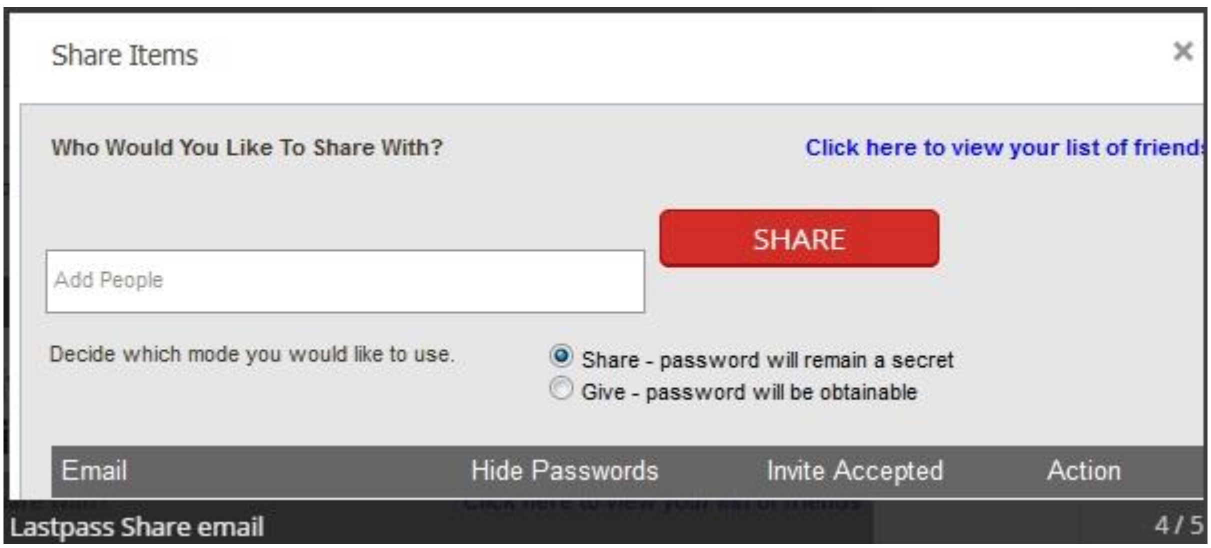
From time to time, you'll need to know How to Share LastPass Login or give a password to your Virtual Assistant team. You can share the login credentials with LastPass without giving the actual password OR you can give the password, there are two options.

Step 1: Create a LastPass or Login to Existing Account.

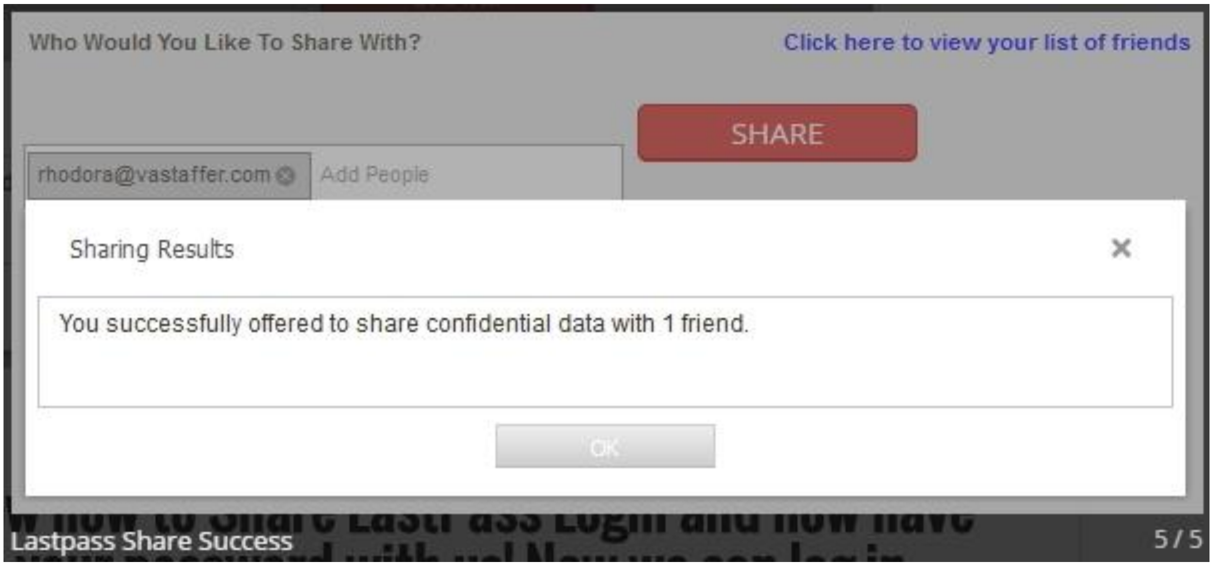
-First go to **http://lastpass.com**

-And then Create an Account or Login.
-Go to your LastPass Vault by clicking per the image. You will be seeing an asterisk that is the LastPass logo on the upper right side of your screen. Click it and Hit the ‘My LastPass Vault’.
-Click the ‘Share’ Icon next to the site or access you want to share. It will be the picture of two heads shown in the picture below.

-On the box, enter in the email address of the Virtual Assistant you want to share with: (your VA will tell you their email address or management will) per the box below. You can either “SHARE” or “GIVE” access as the image shown below. Some cases you will need to GIVE the password, but most of the time you can just “Share” and we can use LastPass to log us in without having access to your password. This will allow you to Share LastPass Login credentials with us!



-After you click “Share” it will give you a confirmation and then our Virtual Assistant Staff will accept the invitation you send. You should see the confirmation below.



You should now know how to Share LastPass Login and now have successfully shared your password with us! Now we can log in and get work done!