PLIA Billing Tutorial

plia

The first step to billing is to select the person who can manage the billing and payment. If that is you, select "I can manage billing". If not, you can select "I need to invite someone else at my firm for billing"

Introduction

To get started, you'll need to setup an account to handle billing. If you have any questions, please review this Plia Billing FAQ.

Please select from one of the following:

If selecting this option, Proceed to the next page of this tutorial.

I can manage billing

I need to invite someone else at my firm for billing

Make your choice to continue

If selecting this option, jump to page 8 of this tutorial.

If you have a question about billing, please read our FAQ.

For problems or support, email us, or call us at (646) 949-4740 or +44 20 3743 3616.

Choose your plan

The Plia platform from Urvin.Compliance enables Investment Managers to easily and quickly satisfy their Best Execution responsibilities with due diligence questionnaires and periodic data requests.

Annual plans receive a discount, please select your preference:

Contract type: Annual | Monthly

You can select a yearly contract that is billable monthly or yearly. The monthly option will be charged more.

Plans for Investment Managers provide full functionality whether purchased monthly or annually.

- Unlimited questionnaires
- Unlimited custom questions
- Unlimited Broker-Dealers

Purchase

If you have a question about billing, please read our FAQ.

For problems or support, email us, or call us at (646) 949-4740 or +44 20 3743 3616.

Purchase Annual Plan

STEP 1

Please select your preferred payment option (W-9 is available as part of this process).

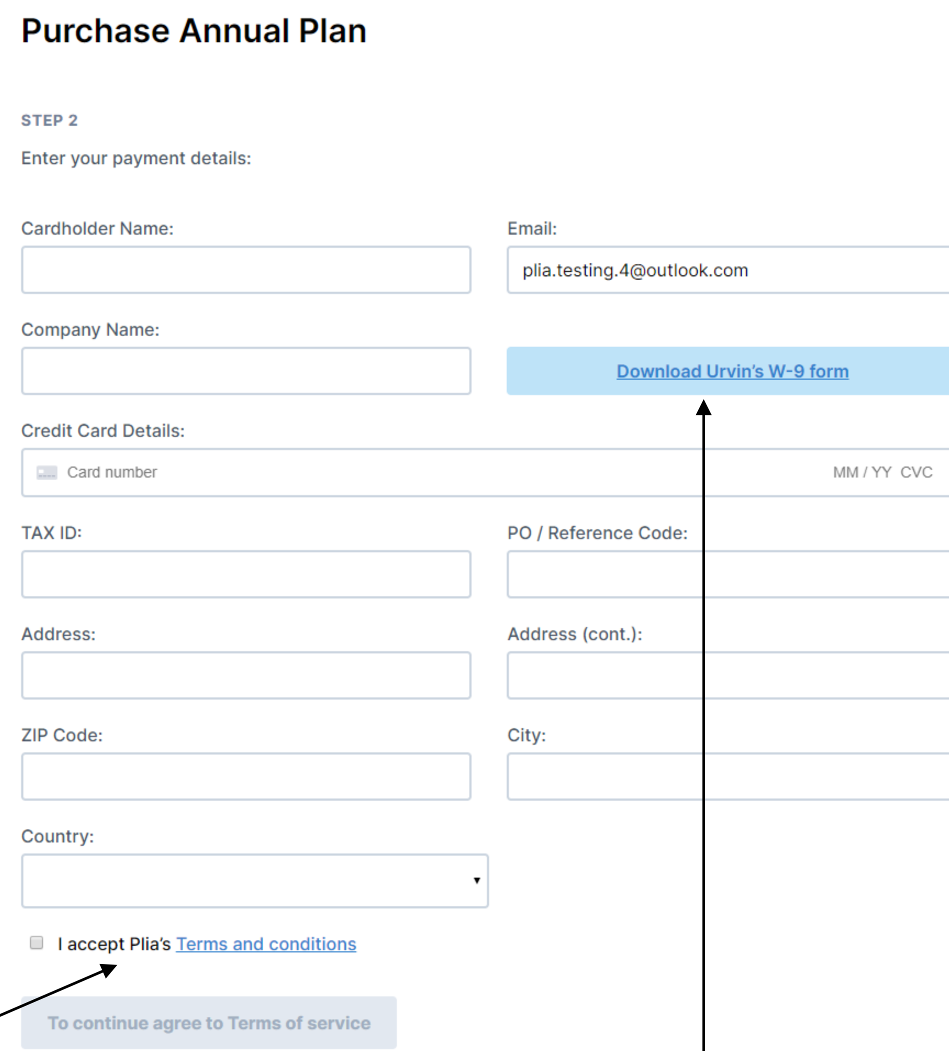
- Credit card
- Wire Transfer/Check

Place order

There are multiple payment options. You can either pay by credit card, which provides immediate and full access to Plia or an off-line payment, such as a wire transfer or check. If you are paying by credit card, proceed to the next page of this tutorial. If by another method proceed to page 6 of this tutorial.

Last Step for those Paying with a Credit Card

If paying with a credit card, enter your details here



Accept the terms and conditions (T&C) here. You may also click on the link to download a pdf copy of the T&C.

If needed, you can also download IRS form W-9

For those paying via a Wire Transfer or Check

Purchase Annual Plan

STEP 1

Please select your preferred payment option (W-9 is available as part of this process).

Select Wire Transfer/Check

Credit card

Wire Transfer/Check

STEP 2

Download a PDF containing all the information required to send out a wire transfer from your bank, or mail us a check.

Download payment instructions

Download PDF

STEP 3

Proceed to enter your payment details. Your company will be under a 14-day trial until your payment is processed. During the trial you can add and edit content, but cannot send to counterparties.

Place order, start 14-day period, and proceed to next page

Place order

Final Step for those paying via a Wire Transfer or Check, then proceed to page 10

Purchase Annual Plan

STEP 4

Enter your payment details:

Name:

Email:

Company Name:

Download Urvin's W-9 form

TAX ID:

PO / Reference Code:

Address:

Address (cont.):

ZIP Code:

City:

Country:

☐ I accept Plia's Terms and conditions

To continue accept Terms and conditions

Accept the terms and conditions (T&C) here. You may also click on the link to download a pdf copy of the T&C.

If needed, you can also download IRS form W-9

If you need to invite someone in your company to handle billing:

Invite people who handle billing and payments

We have other user accounts set up for your organization. se select one or more who can manage billing and legal agreements for vendors:

- [ ] Bill Stephenson

You can select an existing person on file with Plia (if available)

The invitation process will create new Level 2 user accounts, which have access to all existing data within Plia, but which cannot interact directly with counterparties.

Email address	First name	Last name
Email address	First name	Last name

Add another user

Select at least one person to continue

You may also invite someone not listed

Emails sent!

We have sent emails or invitations out.

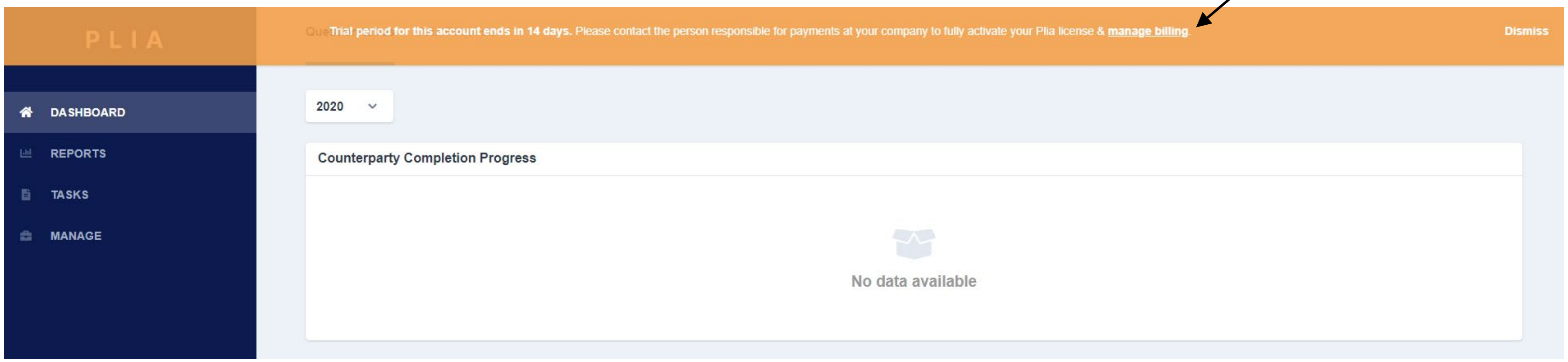
The billing administrator will have two weeks to enter payment information. Once this is completed, Level 1 users will be able to send questionnaire or data request responses to clients.

Thank you for your help! You can now proceed to Plia and continue to use the platform.

Continue to Plia

After you send an email to the person internal to your firm who handles billing, you will then be able to proceed to the Plia platform. You will not be able interact with counterparties until payment has cleared.

Until Payment is received, your Plia screen will display an orange bar upon sign-in. If at anytime you need to manage billing or make a payment, click on the “manage billing” link.



You will then be taken to this screen. Return to page 2 of this tutorial for the workflow