

PLIA Billing Tutorial

plia

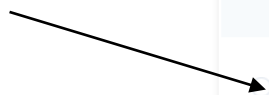
The first step to billing is to select the person who can manage the billing and payment. If that is you, select “I can manage billing”. If not, you can select “I need to invite someone else at my firm for billing”


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](#).

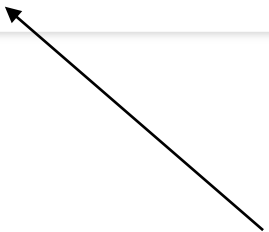
Please select from one of the following:

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 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](#).

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

Choose your plan

The Plia platform enables Broker-Dealers to streamline their processes for responding to client data requests and questionnaires, providing you re-usable responses and integrated approval workflow management. Broker plans are based on the number of regions that must be supported (discounts are available when selecting all three regions, and/or when paying annually).

Note: The region is determined by the location of the counterparty's trade execution services or the location of the regulatory authority which has oversight of the trade execution process for that counterparty.

Contract type: Annual Monthly

Select regions that you'd like to operate in:

- North & South America
- Europe, Middle East & Africa
- Asia, Australia & New Zealand

\$6,000 /Year

Pay annually for 1 region

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



You can select the region which covers your license. This would be the markets in which your clients are trading. For example, a US based client trading team that only trades European securities would be the “Europe, Middle East & Africa” selection. The price is for unlimited clients and questionnaires in that region.

Purchase Annual Plan

\$6,000 /Year

STEP 1

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

 <input checked="" type="radio"/> Credit card	 <input type="radio"/> Wire Transfer/Check
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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

Purchase Annual Plan

\$6,000 /Year

STEP 2

Enter your payment details:

Cardholder Name:

Email:

Company Name:

[Download Urvin's W-9 form](#)

Credit Card Details:

<input type="text" value="Card number"/>	<input type="text" value="MM / YY CVC"/>
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TAX ID:

PO / Reference Code:

Address:

Address (cont.):

ZIP Code:

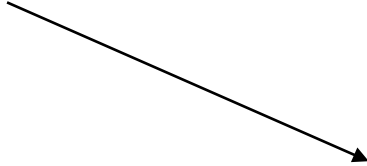
City:

Country:

I accept Plia's [Terms and conditions](#)

To continue agree to Terms of service

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

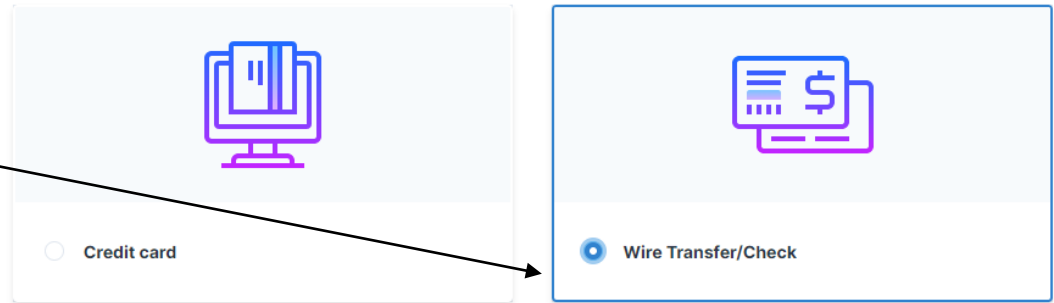
Purchase Annual Plan

\$6,000 /Year

STEP 1

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

Select Wire Transfer/Check



The screenshot shows two payment options side-by-side. The left option is 'Credit card' with an unselected radio button and a computer monitor icon. The right option is 'Wire Transfer/Check' with a selected radio button and a check icon with a dollar sign. An arrow points from the text 'Select Wire Transfer/Check' to the selected radio button.

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

\$6,000 /Year

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:

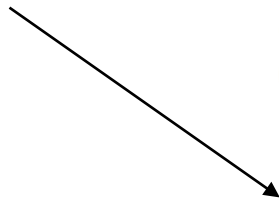
City:

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
<input type="text" value="Email address"/>	<input type="text" value="First name"/>	<input type="text" value="Last name"/>



You may also invite someone not listed

Emails sent!

We have sent emails or invitations out.

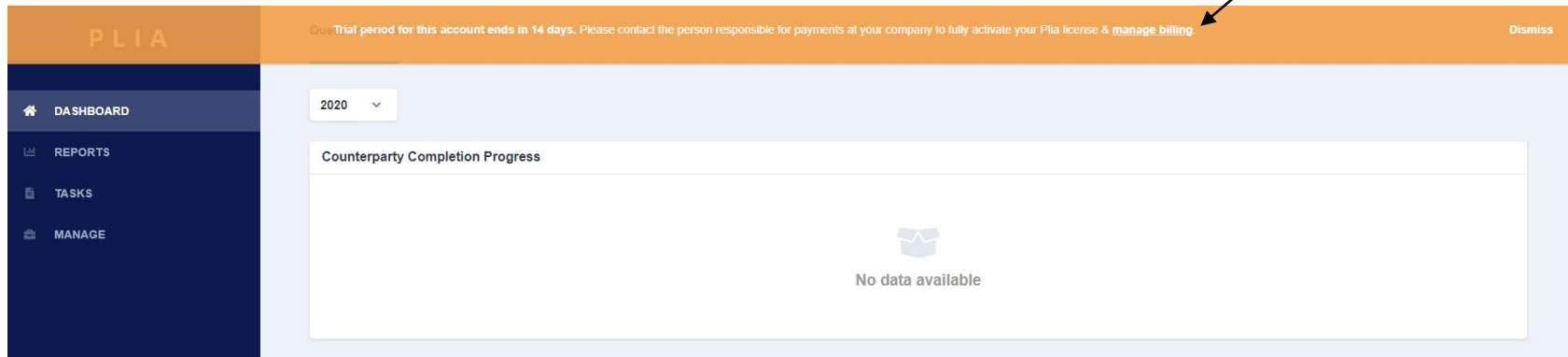
The billing administrator will have two weeks to enter payment information. Once this is completed, Level 1 users will be able to send questionnaire or data request responses to clients.

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 to submit responses to clients 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

Introduction

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Please select from one of the following:

 <input type="radio"/> I can manage billing	 <input type="radio"/> I need to invite someone else at my firm for billing
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Make your choice to continue