

INTRODUCTION GUIDE (GUIDE C1)

This guide is for businesses that:

- Already have an existing account with a HRIS approved partner.

And that:

- The HRIS provider only allows for the creation of records, no Databank searches.
- The HRIS provider works with branches/sub accounts.

1. Now that you've created your account navigate to the 'Search' page and perform a quick test search of the CONVEY Databank using the sample data that's pre populated (just visit the search page and click the green button). This will reveal some sample records to show you what the records look like when you conduct a real search.

2. Login to your account with your HRIS provider, follow their guidance on how to you're your CONVEY account to your account with them, it should be a simple task of providing them with your CONVEY CBR ID which you will find on your settings page and your password. Once the two accounts are connected you will be able to create records from within their software, any records you create will be automatically copied to the CONVEY Databank for you.

3. Navigate to your 'Settings' page, click on the 'account settings' tab, at the bottom of that page you will see an option that says 'Chosen Connection Type'.

Untick the API and the DIRECT CONNECT options which will make those links disappear from the main menu along the left.



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4. Adjust your internal HR procedures to allow for the inclusion of Conveyable Records, consider which type of records you want to create, when they should be created, and what the content of those records should be. This adjustment should be part of your wider HR strategy so should for example include how often reviews are completed and by whom for whom. If you need help you can find a list of HR professionals in the 'Find Help' page in the bottom left.

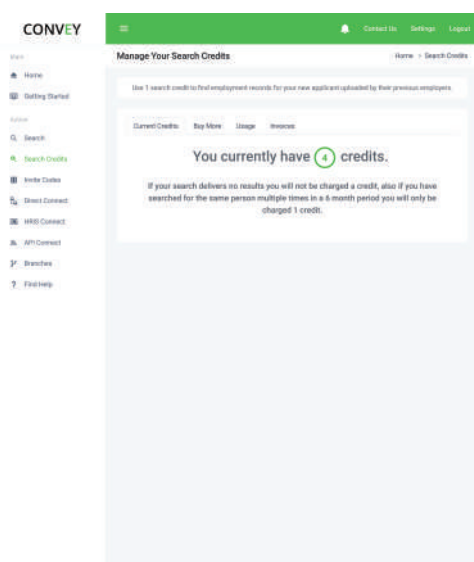
5. Navigate to the 'Branches' page (bottom left), on that page click the buttons and activate the branches (ignore the branch level direct connect button).

Whilst on that page open the branches tab and add your branch accounts making note of your branch password and the branch ID that we assign, these are all shown on the branch table at the bottom for easy reference. You can access each branch account from that table by clicking the login link.

6. Print off our 'CONVEY Introduction' leaflet for your, this leaflet will give them an introduction to CONVEY and explain why you are using it.

7. Print off our 'Employee Leaflet' and circulate it to your employees to introduce them to CONVEY.

Note: If you want to design your own information leaflets, you can find the CONVEY logo on the branding page in the footer of our main website.



8. Attract the right type of job applicants by downloading our 'CONVEY connected' images from the table of downloads, you should put the image in the 'footer' of your webpage, and if possible on your 'about us' page.

9. Load your account by visiting the 'Search Credits' page shown along the left so you have everything setup ready for when you need it. You will be able to perform a search from within the HRIS software as long as you have a positive balance.

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10. FINALLY.... Profit from our growth by introducing other businesses to CONVEY , we have an article covering the benefits which is available to read from your home page.

Note 1 : When searching never store the results of the search (the information is read only) you can search the same information multiple times within a 3 month period and you will only use one search credit so there is no need to store data.

Note 2 : When creating records never make reference to an employee's specific medical condition or uncontrollable aspects of their physical appearance, never list contact numbers, addresses or make reference to an employee's sexuality or religious beliefs.

CONVEY

[Contact Us](#)[Settings](#)[Logout](#)

Manage Your Invite Codes

Home > Invite Codes

Invite...

Send an email to your contacts inviting them to check us out (see example)

Include...

Include a unique referral code which gives then 50% more credits on their first purchase.

Profit...

You get 20% of whatever they spend. (Not just once but for life)

Your CodePayments ReceivedWithdraw Funds

Universal Codes

Our universal codes expire after 10 days, you can generate one code every 30 days and one code can be shared with multiple businesses.

4 days until your new code can be generated

Unique Codes

Unique codes last for 10 days and can be sent to just one other business, the advantage with unique codes is that after you send your email containing the link, we will send 2 reminder emails to your contacts.

Your contacts email address	Unique code
No data available in table	

Add another line

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