

INTRODUCTION GUIDE (GUIDE B1)

This guide is for businesses that:

- Want to create branch accounts to perform Databank searches at branch level.
- Want to use DIRECT CONNECT to create records at branch level.

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. Once you have activated branches your team will be able to perform this same test search within their branch account so they can familiarise themselves as well.

2. Navigate to the 'settings' page (link in the top right of the screen) and upload your own logo, this will replace the CONVEY logo on the record templates and give your records a more personal look.

3. Whilst you are in 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 HRIS options which will make those links disappear from the main menu along the left.

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



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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.

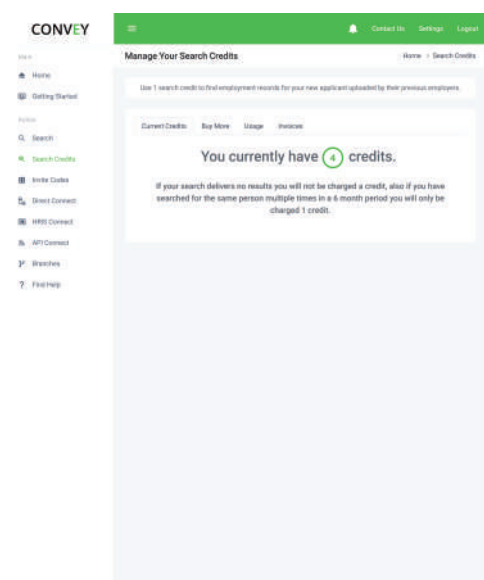
5. Navigate to the 'Branches' page (bottom left), on that page click the buttons to activate both branches and branch level direct connect.

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. Whilst on your Branches page evaluate the content of the default templates on the record templates tab to see if they meet your needs, you can view the content of each of the default records, print a copy and hide the ones you decide not to use (once hidden they will not appear within the branch accounts). You can also hide all the defaults templates and just use your own, or use a combination of your own and our defaults, the choice is yours.

**Because you are using branch level DIRECT CONNECT the employee details, and record content will be added at branch level not the main parent account.

7. Print off our 'CONVEY Introduction' leaflet for your managers (and anyone that uses the CONVEY branch account), this leaflet will give them an introduction to CONVEY and explain why you are using it.



8. Print off our 'Branch Introduction' leaflet, fill in the 'branch login details' and give it to the relevant branch managers. This leaflet should give your managers an overview of the branch account and what can be done, you will need to spend a little time with each manager to ensure they understand the process for searching/adding employees / creating records .

9. 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.

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

11. Load your account by visiting the 'Search Credits' page shown along the left so you have everything setup ready for when you need it.

12. 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.

The screenshot displays the CONVEY web application interface. At the top, there is a green navigation bar with the CONVEY logo, a hamburger menu icon, and links for Contact Us, Settings, and Logout. Below the navigation bar, the page title is 'Manage Your Invite Codes'. The main content area is divided into three columns: 'Invite...', 'Include...', and 'Profit...'. The 'Invite...' column contains a button 'Send an email to your contacts inviting them to check us out (see example)'. The 'Include...' column contains a button 'Include a unique referral code which gives then 50% more credits on their first purchase.'. The 'Profit...' column contains a button 'You get 20% of whatever they spend. (Not just once but for life)'. Below these columns, there are two tabs: 'Your Code' and 'Payments Received'. The 'Your Code' tab is active, showing a table with two columns: 'Universal Codes' and 'Unique Codes'. The 'Universal Codes' column contains a button '4 days until your new code can be generated'. The 'Unique Codes' column contains a button 'Add another line'.

Universal Codes	Unique Codes				
<p>Our universal codes expire after 10 days, you can generate one code every 30 days and one code can be shared with multiple businesses.</p> <p>4 days until your new code can be generated</p>	<p>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.</p> <table border="1"><thead><tr><th>Your contacts email address</th><th>Unique code</th></tr></thead><tbody><tr><td colspan="2">No data available in table</td></tr></tbody></table> <p>Add another line</p>	Your contacts email address	Unique code	No data available in table	
Your contacts email address	Unique code				
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