



INTRODUCTION GUIDE (GUIDE B2)

This guide is for businesses that:

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

1. 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're 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 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.

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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).

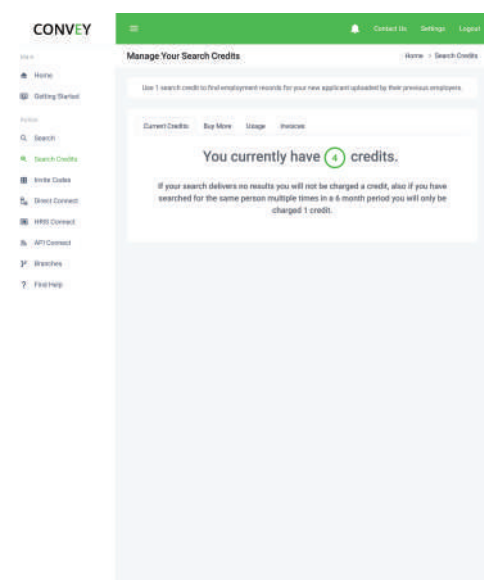
Whilst on that page open the branches tab and add your branch accounts making note of your branch password and the branch ID that we assign, these are all shown on the branch table at the bottom for easy reference. You can access each branch account from that table by clicking the login link.

6. Navigate to the 'Direct Connect' page and 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 and print a copy for your reference. You can hide all the defaults templates and just add/use your own, or use a combination of your own and our defaults, the choice is yours.

7. Add your employee details to your account on the DIRECT CONNECT page.

8. 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.

9. Print off the first page of 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.



10. 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.

11. 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.

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

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13. 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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