Talk B2B

WWW.TALKB2B.NET
By CONVEO

TalkB2B Platform Instruction Guide

for event organizers

CMS System Use

Contents

Introduction

Thanks for choosing TalkB2B platform. Our platform can help You in many ways in organizing events.

(Prior to the event)

- Easy and intuitive creating and maintenance of the conference
- Online creating of entire conference
- Online creating of meetings schedule
- The possibility of including co-organizers who would be responsible for their region
- Edit, delete, and validate any user profile
- Different types of participants; creating rules which type can ask which type for a meeting
- Registering lecturers and speakers
- The ability to create whole conference in a day with a Wizard
- Attracting new entrants to the conference because of the added value of B2B meetings
- Registering visitors for unlimited events with/without limited number of chairs
- Social networking / Twitter, Facebook

(During the event)

- Communication with participants through predefined emails (for scheduling new meetings, sending a meetings schedule, information about new meetings, information about canceled meetings etc.)
- Online payment with credit cards
- Creating a valid PDF receipt in accordance with the Law of the Republic of Serbia
- No need for technical knowledge in order to use the platform
- Provide important news to the participants or visitors
- Printing of various reports

(After the event)

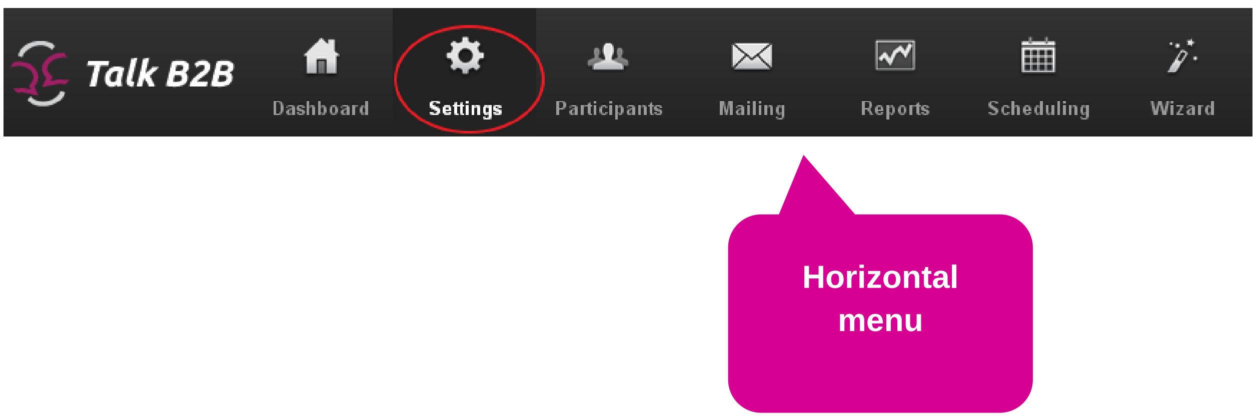
- Feedback after the conference in the form of questionnaires
- Various reports in PDF or MS Excel formats

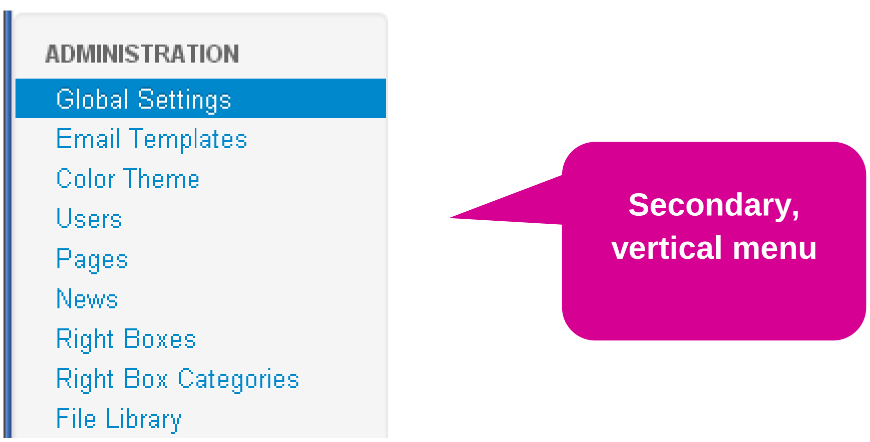
The list “what You can do” is long, and the real question is **“How can I do all of that?”**
To answer this question, we prepare this manual. The back of the platform has friendly user interface, and below is a set of instructions on how to use our Content Management System that powers the TalkB2B platform.

Get started with Talk B2B backend tools

Navigation (horizontal menu, sub menus)

Please use the top horizontal menu for the navigation through the CMS system:





Basic Features

The basic features are:

DASHBOARD

SETTINGS

PARTICIPANTS

MAILING

REPORTS

SCHEDULING

WIZARD

FINANCE

Dashboard

This option provides a quick overview of the most important data needed one organizer:

- Activity: number of registrations, number of meetings...

- Statistics: number of active users, on hold, rejected, deleted. The number of actvie and on hold cooperation profiles. The number of accepted meetings...

- Events: number of planned meetings per each day

- Additional Events: During the main event, you can have additional events

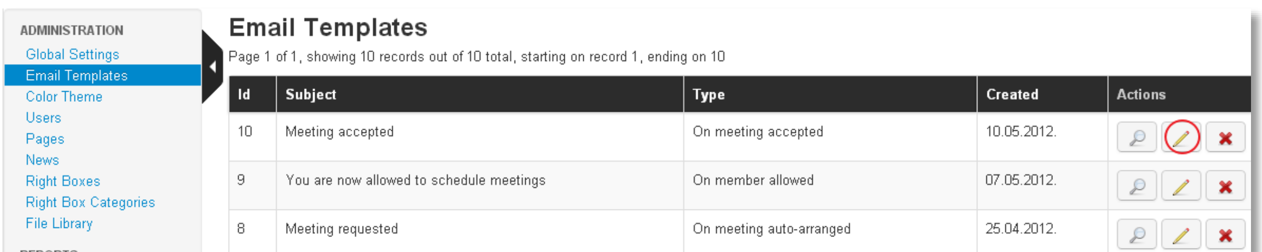
- Main administrators:

- Co-Administrators

Settings

*Select **Setting** tab to access the sub-menu with most important controls for the system*

.


ADMINISTRATION
Global Settings
Email Templates
Color Theme
Users
Pages
News
Right Boxes
Right Box Categories
File Library

Email Templates

Page 1 of 1, showing 10 records out of 10 total, starting on record 1, ending on 10

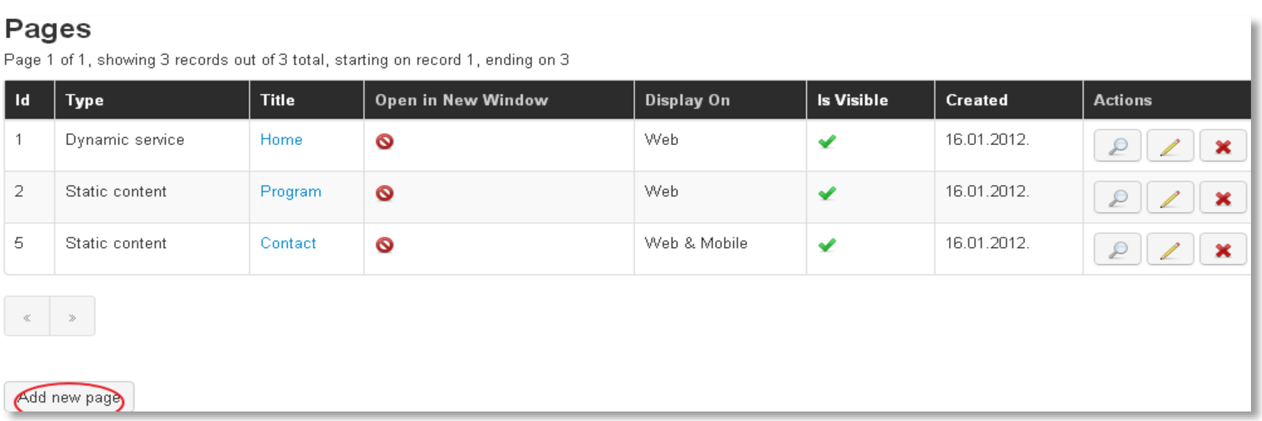
Id	Subject	Type	Created	Actions
10	Meeting accepted	On meeting accepted	10.05.2012.	
9	You are now allowed to schedule meetings	On member allowed	07.05.2012.	
8	Meeting requested	On meeting auto-arranged	25.04.2012.	

*__Global Settings__ contains data you previously may have entered into the online form

*__Email Templates__ opens the list of predefined e-mail accounts, which the system automatically send to the users. Click edit (yellow pencil symbol) to change or add content.

*__Color Theme__ edit visual appearance of the platform

*__Users__ administrators can maintain user profiles


Pages

Page 1 of 1, showing 3 records out of 3 total, starting on record 1, ending on 3

Id	Type	Title	Open in New Window	Display On	Is Visible	Created	Actions
1	Dynamic service	Home		Web		16.01.2012.	
2	Static content	Program		Web		16.01.2012.	
5	Static content	Contact		Web & Mobile		16.01.2012.	

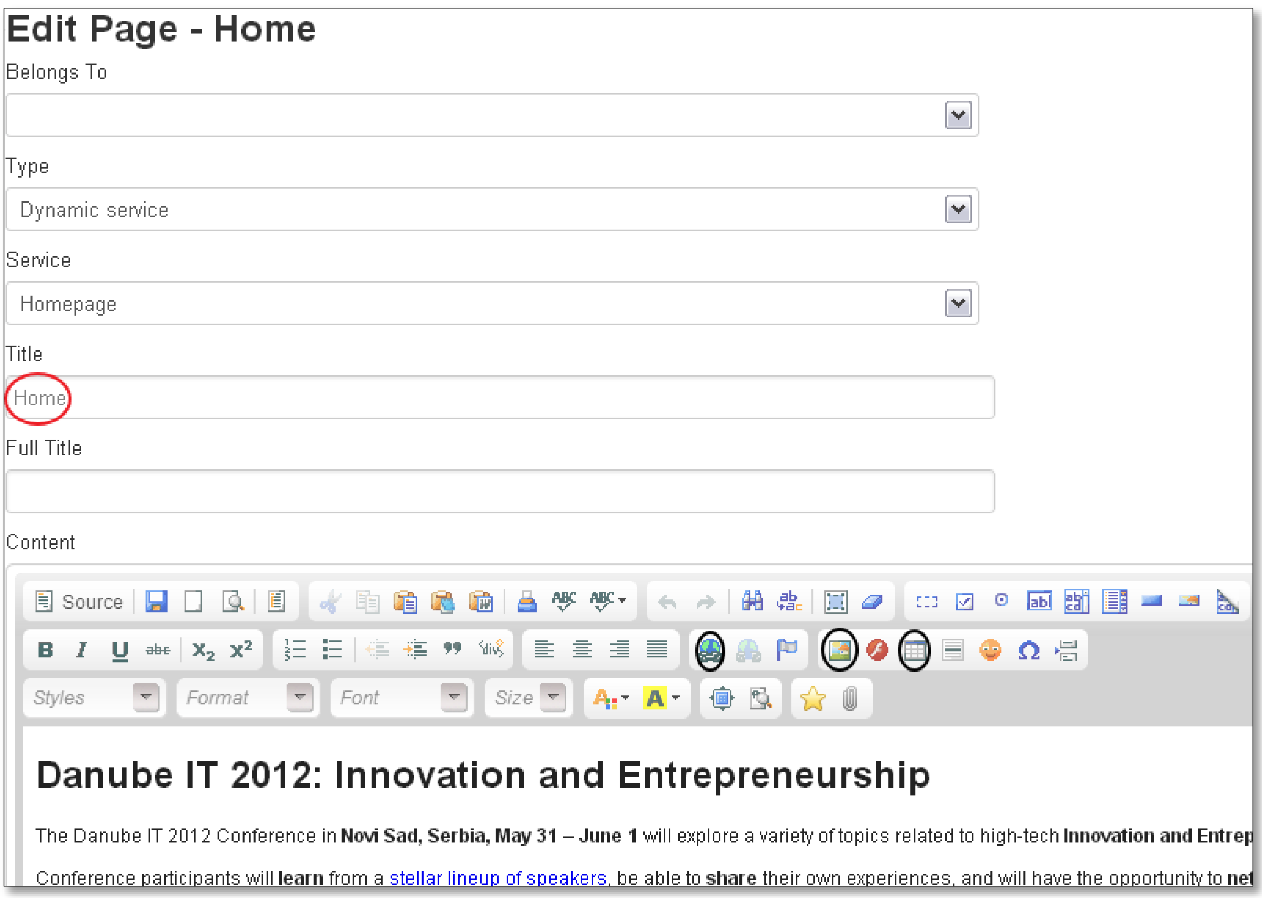
« »

Add new page

Pages

With Talk B2B you have web site too. The Pages option is controlling the content of front end web pages.

If you want to add new page on front end - select **Add new Page** to add content



***Title** field is reserved for the name of the page

*Content field can be added by using existing tools. For example, there are tools for adding links, images and tables (marked)

Save each page after you've added all appropriate content

Title	Open in New Window	Display On	Is Visible	Created	Actions
Home		Web		16.01.2012.	
Program		Web		16.01.2012.	

Aside from creation tools, there are additional tools for manipulation of your pages

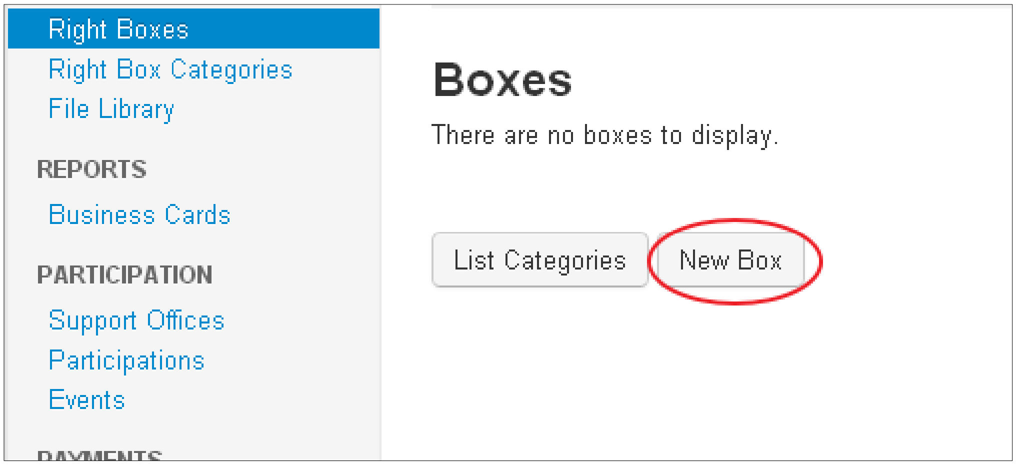
***Is Visible** controls if the page is live

***Edit** (yellow pencil icon) allows for additional editing of the page

*Red '**X**' icon - is a delete page command

Boxes

This feature controls the content of right column on front end (banners, boxes...)



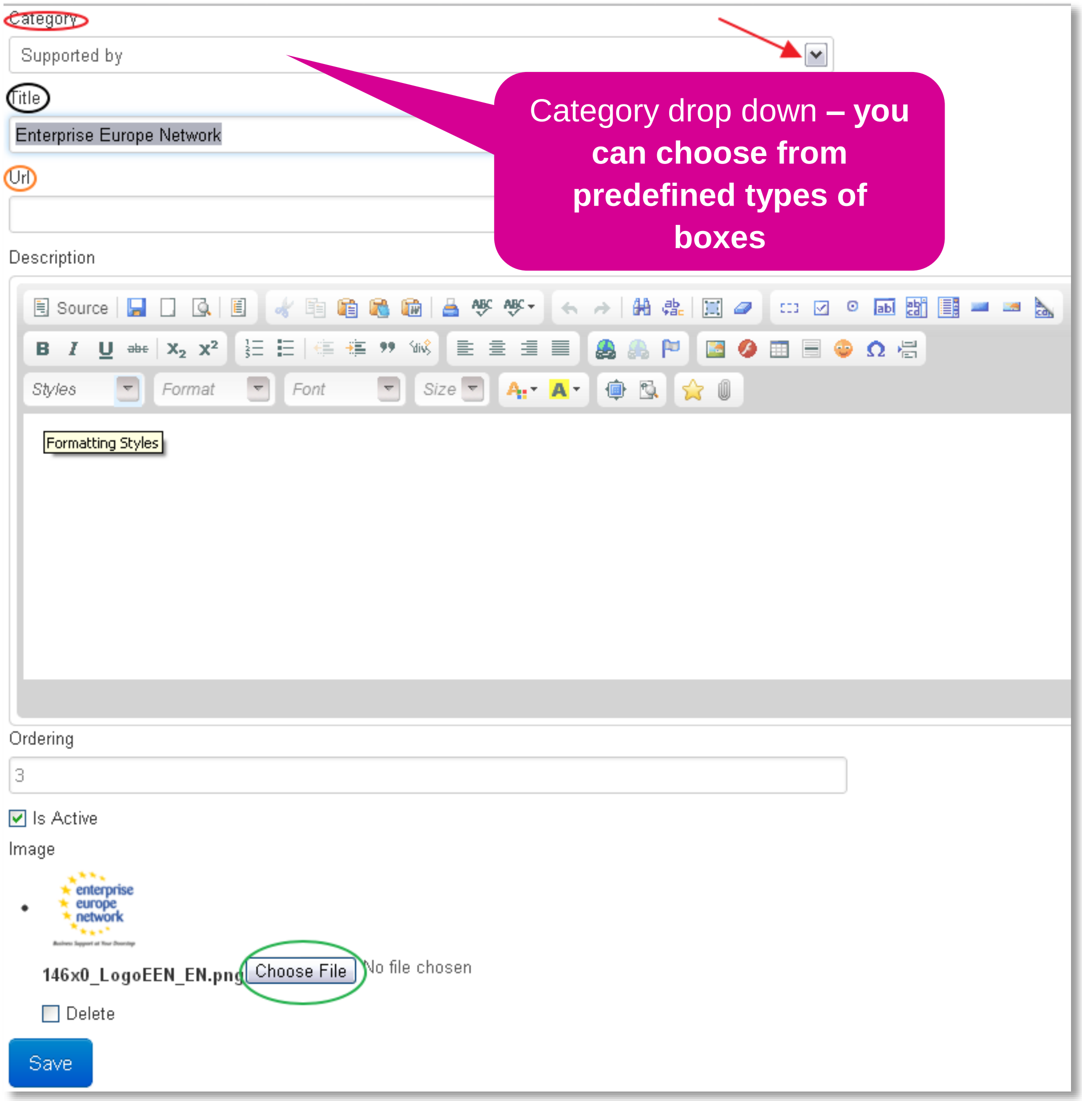
Your photos are placed on the right side of your page, as well as the event address and organization’s logo, support info, etc.

*__Right Boxes__ allows you to edit these fields

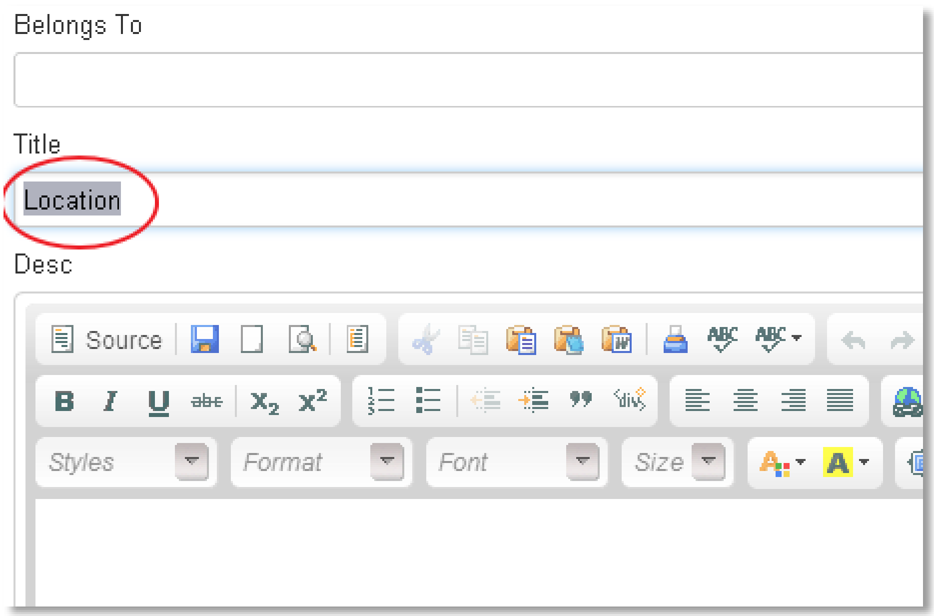
* **Right box Categories** will allow you to create your own (select **New Category**)

New Box feature

*__New Box__ opens a dialogue box for creation of a new box to be located on the right side



So far you've created only the category



* **Belongs to** field is still blank, please fill in the **Title** and don't forget to **Save**

File Library

If you need to insert the new image on some page of your website...

If you want to insert an image on a web site, you must first import the file library.

• To insert a file in the library, Click on the option **New attachment**.

• Select a file from your computer by clicking the **Browse** option.

• Enter the title of your images, and do not forget to click on the **Save button**!

Reports - Business Cards

With Talk B2B you can create ID cards for your event

Our application has a very useful functionality to all the organizers. It is the automatic creation of ID cards for all registered participants. ID cards allow all participants quickly identify the next participant and to facilitate communication and the establishment of the initial contact.

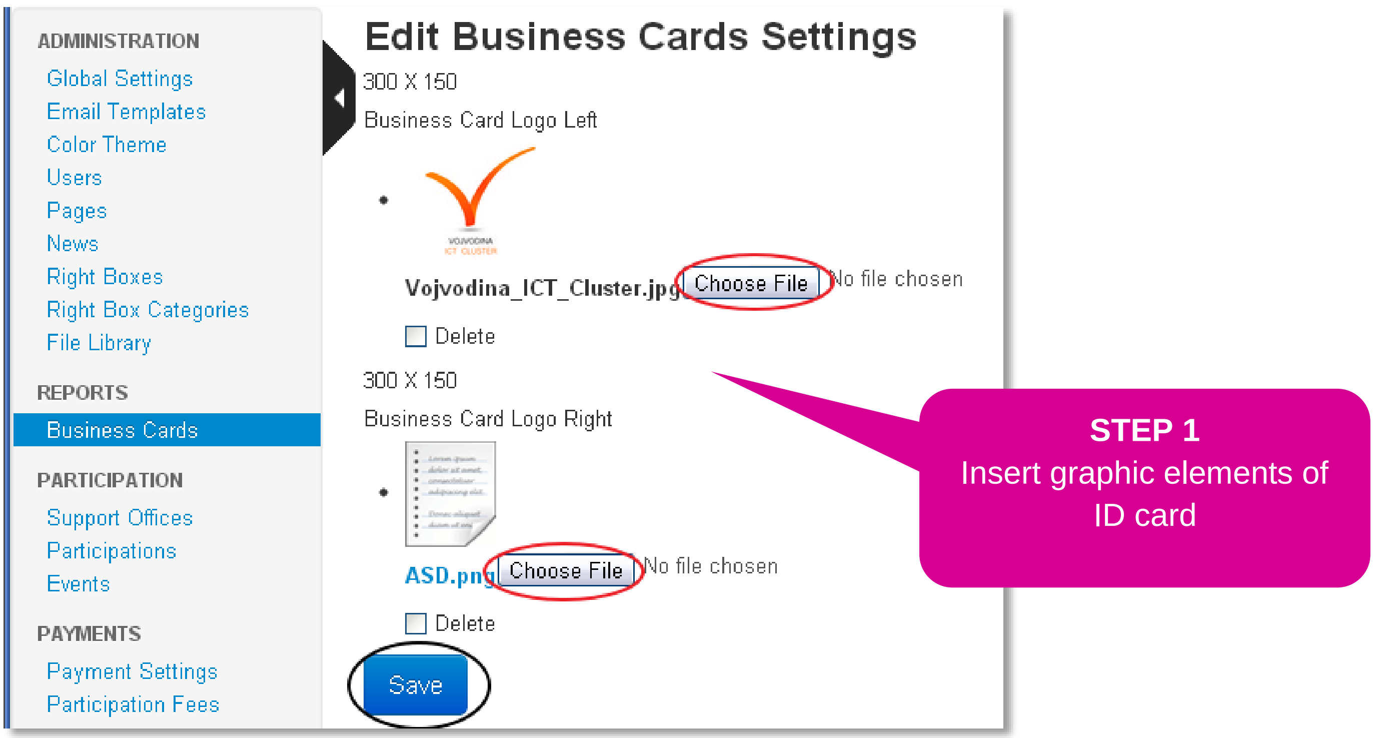
Your ID cards are created in just 2 steps!

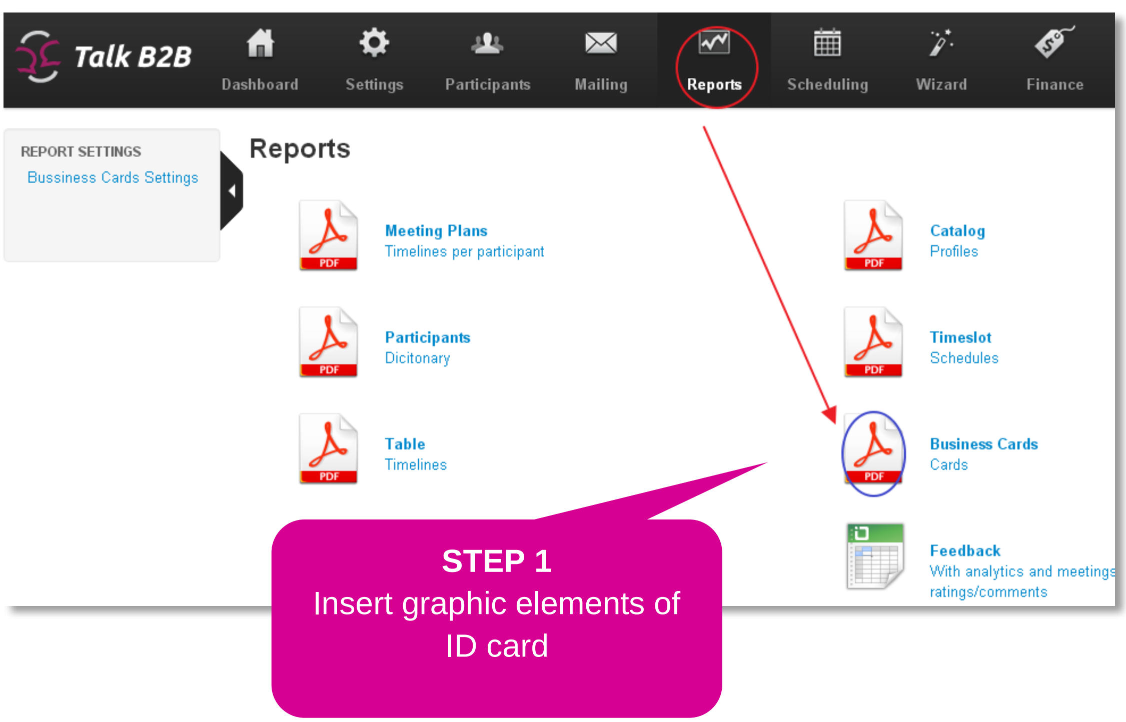
Business Card creation is easy – it is two step solution.

STEP 1: Insert a file for a logo and select a location (left or right)

STEP 2: **Reports** (located in the pull-down menu) select PDF format Business Cards

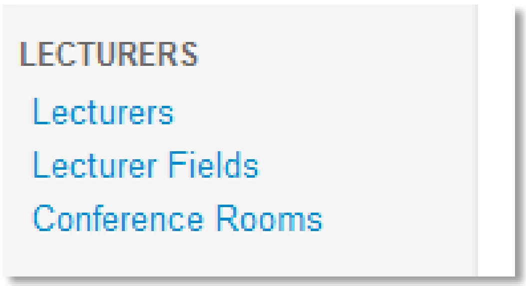
Talk B2B system will select all appropriate users, who opted to use the B2B meetings, and it will create a business card for each. The printing process is left up to you.


ADMINISTRATION
Global Settings
Email Templates
Color Theme
Users
Pages
News
Right Boxes
Right Box Categories
File Library
REPORTS
Business Cards
PARTICIPATION
Support Offices
Participations
Events
PAYMENTS
Payment Settings
Participation Fees
Edit Business Cards Settings
300 X 150
Business Card Logo Left
Vojvodina_ICT_Cluster.jpg
Choose File
No file chosen
Delete
300 X 150
Business Card Logo Right
ASD.png
Choose File
No file chosen
Delete
Save
STEP 1
Insert graphic elements of ID card


Talk B2B
Dashboard
Settings
Participants
Mailing
Reports
Scheduling
Wizard
Finance
REPORT SETTINGS
Bussiness Cards Settings
Reports
Meeting Plans
Timelines per participant
Participants
Dicitonary
Table
Timelines
Catalog
Profiles
Timeslot
Schedules
Business Cards
Cards
Feedback
With analytics and meetings ratings/comments
STEP 1
Insert graphic elements of ID card

Lecturers

Lectures feature is reserved for speakers or presenters at your event.



How to add a new lecturer?

• Click on Lecturers link. The new option “New Lecturer” will be available now. Click there.

Inserting the data about a new lecturer

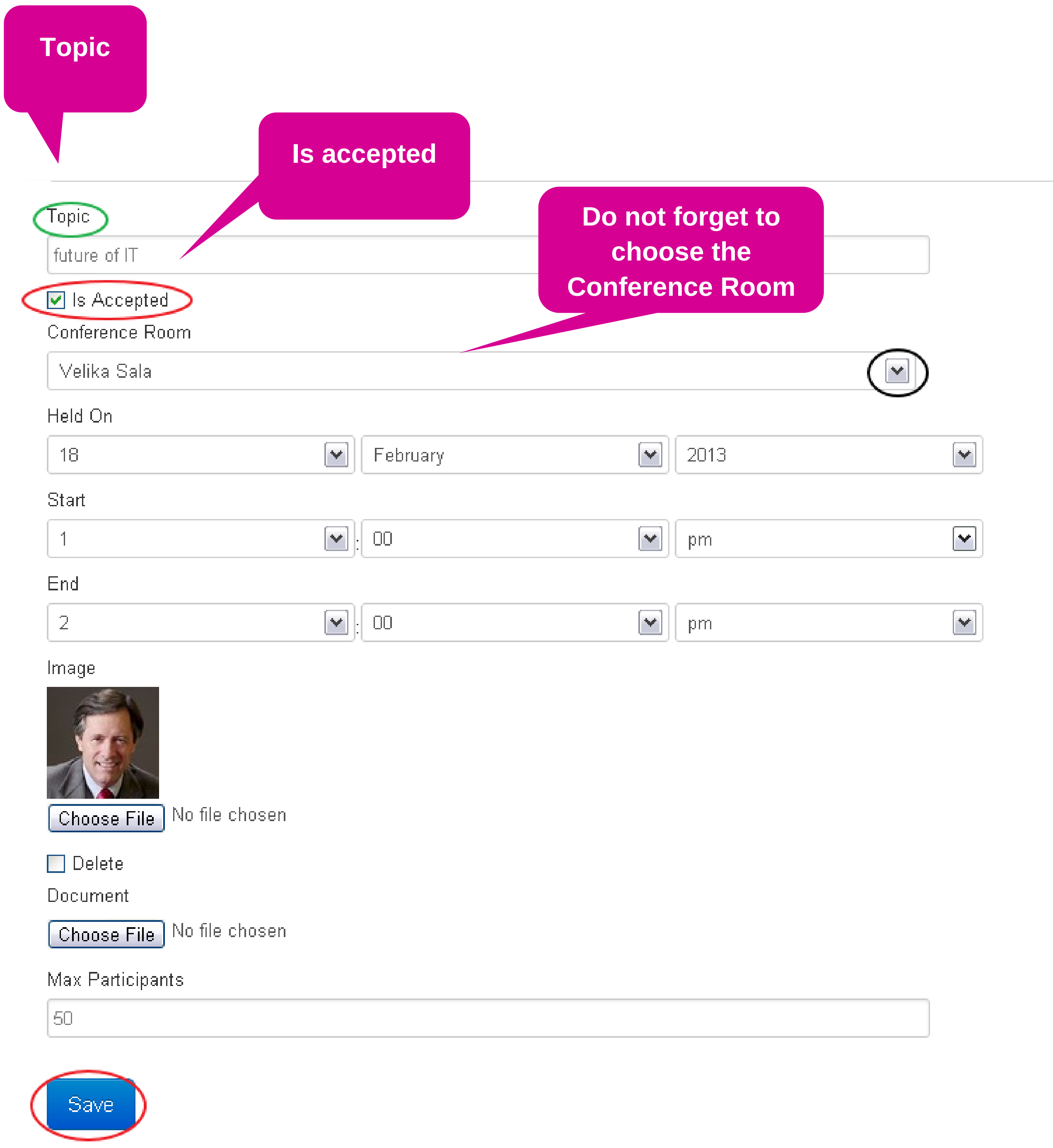
*Start by selecting **New Lecturer** to fill out the appropriate information

After you entered the typical info: first and last name, etc. please pay attention to the following:

***Topic** title of the presentation

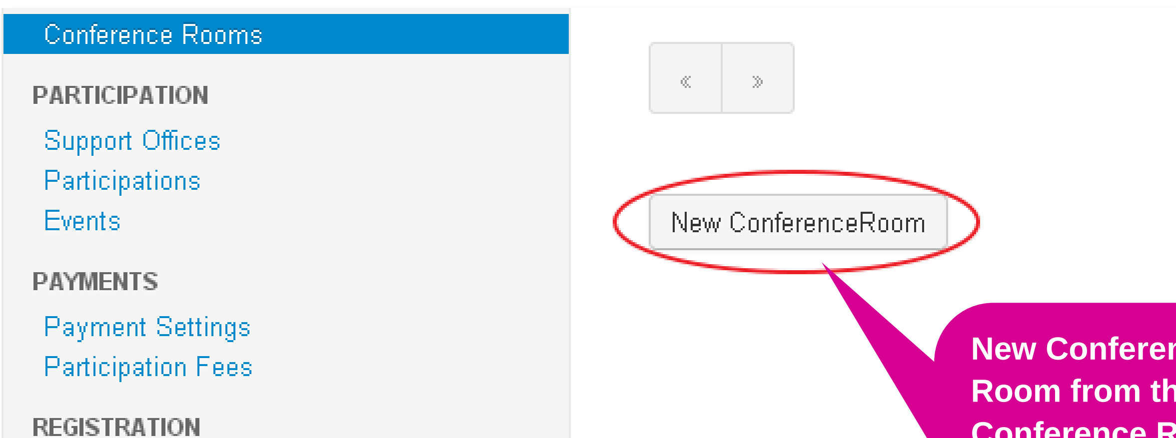
***Is Accepted** needs to be checked once the topic has been approved

***Conference Room** from the pull-down menu, is the physical location of the presentation

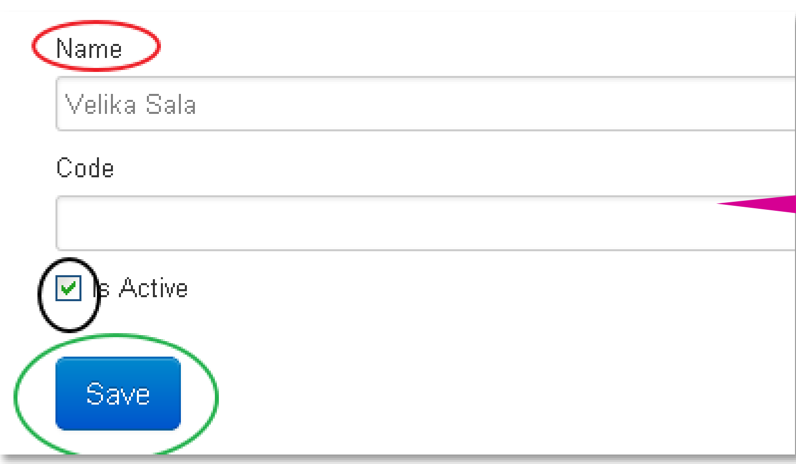

Topic
Is accepted
Do not forget to choose the Conference Room
Topic
future of IT
Is Accepted
Conference Room
Velika Sala
Held On
18
February
2013
Start
1
00
pm
End
2
00
pm
Image
Choose File
No file chosen
Delete
Document
Choose File
No file chosen
Max Participants
50
Save

It is possible to have several different Conference Rooms.

The following three fields specify the date and time of the event



New Conference Room from the Conference Room pull-down menu is used to add a new physical location to the list



Follow the instructions to create a new entry

***Is Active** needs to be checked for the entry to go live

Participation

This is one of the major functionality of the system. Through this option you will be able to:

- Create a list of support offices

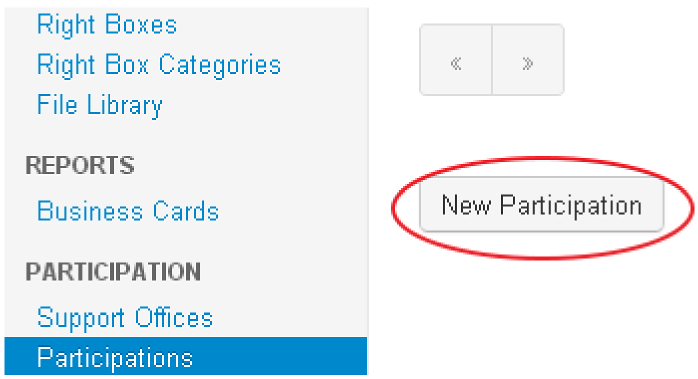
- Set the date and time of the start and end events

- Manage a list of supporting additional events

Support Offices

***Support Office** allows selection of options for the entire group. As an organizer you control which users will have access to which group or even if they will be able to select a group.

Participations



*__Participation__ is reserved for the exact meeting date and time data for each B2B meeting
*__New Participation__ creates a new meeting event

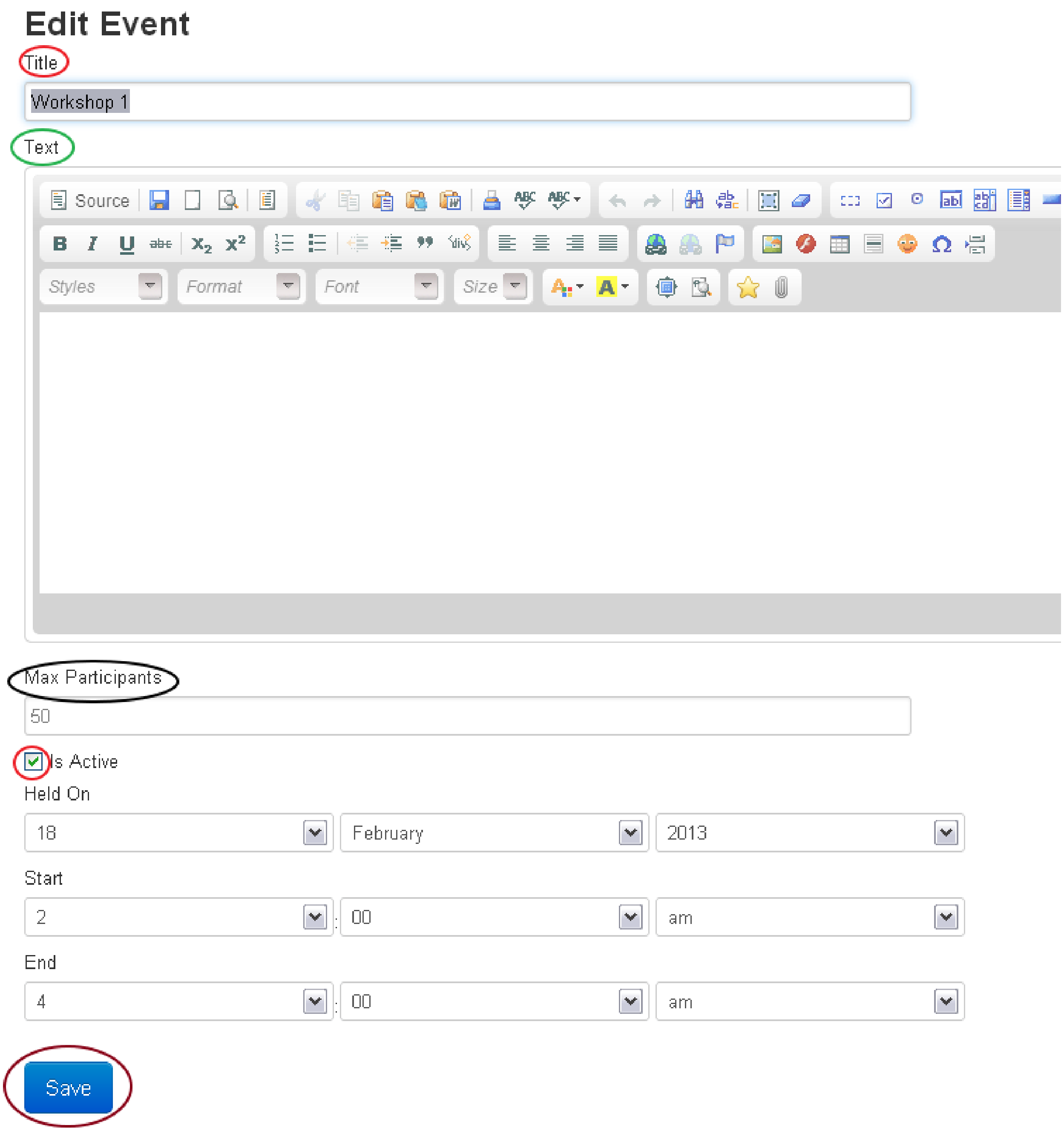
New events

You can have unlimited number of additional events

*__New Events__ is used to enter information about other events, like workshops
*__Title__ insert the name of the event
*__Text__ insert a short description of the event

*__Max Participants__ insert the max number of participants (if needed)

*__Is Active__ makes the event go live



The following three fields specify the date and time of the event

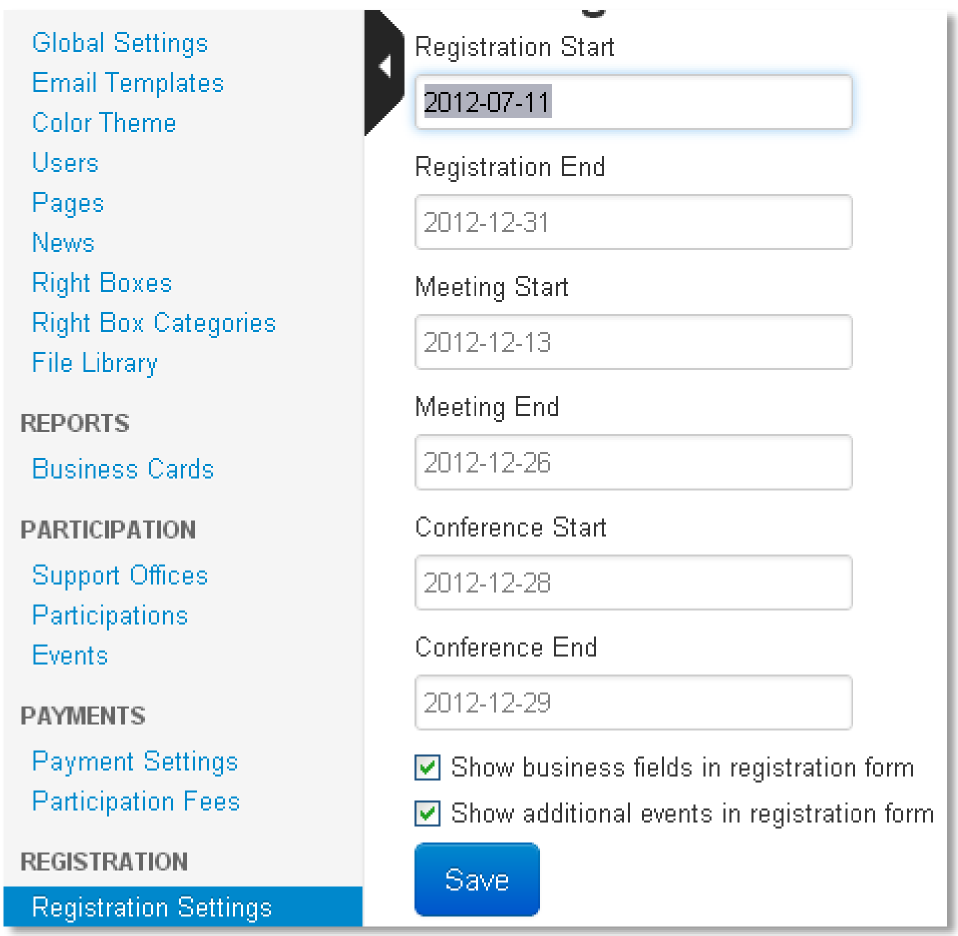
> *Pay particular attention to this group of options. This is part of what sets the most important information about each particular event!*

Registration

Through this group of options you will be able to:
- Define the date and time of the conference, a delay in scheduling meetings
- Define the fields in the registration form
- Determine the types of organizations
- Define the activity organizacia
- Define the size of the number of employees
- Create regions, countries and locations
- Check multilangual support
- Create the types of Users

Registration settings

Registration Settings insert the beginning and end dates for the registration period, as well as for scheduling meetings and event dates.



Registration Fields

As an organizer, you have the ability to create a list of fields present on the registration form and also you can specify which of those are mandatory

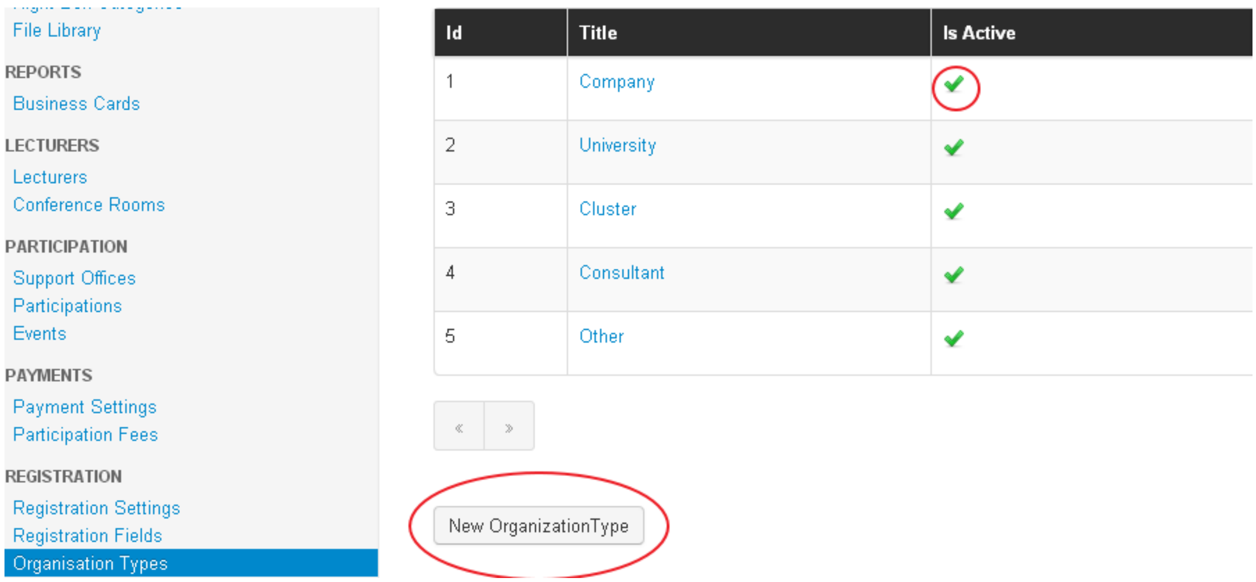
REGISTRATION
- Registration Settings
- **Registration Fields**
- Organisation Types
- Organisation Size
- Areas of Activity
- Regions

Title	Is Active	Is Required
E-mail		
Confirm E-mail	✓	⊘
Organization	✓	⊘

*__Is Active__ allows each filed to be added to the registration

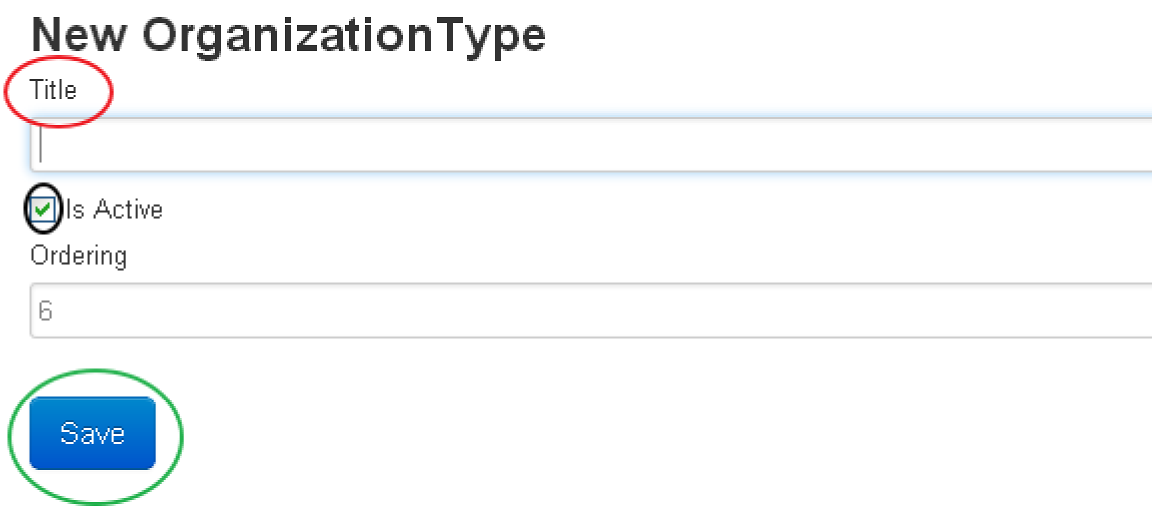
*__Is Required__ allows each filed to be selected as a required on the form

Organization Types



*__Organization Types__ selects preset organization type

*__Is Active__ option controls if the organization will be visible or not

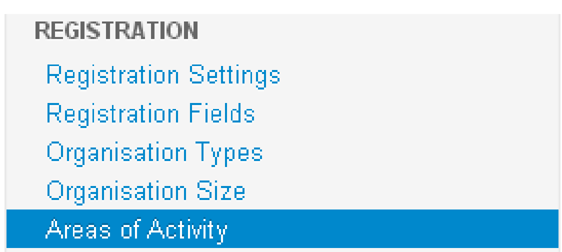


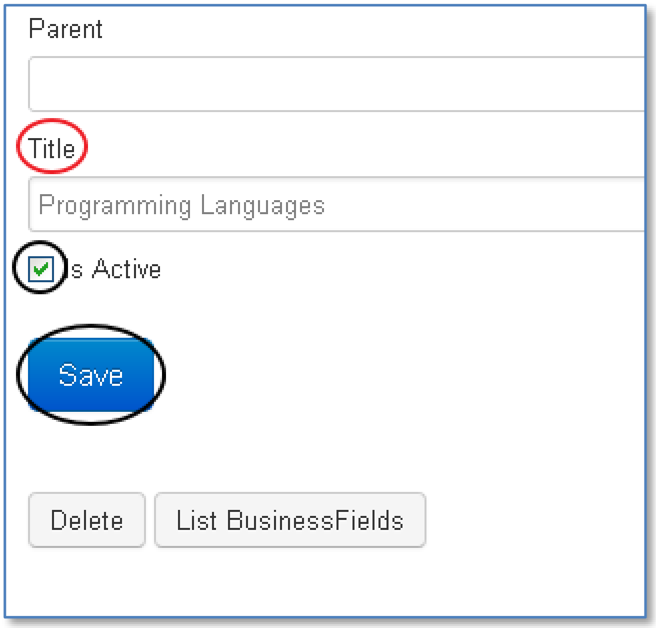
*__New Organization__ type allows you to add a custom type

*__Title__ inser the name of the organization

*__Is Active__ activates the new type

*__Save__ to confirm all additions or changes





*__Areas of Activity__ from the pull-down menu allows you to view or create a **New Business Field**

***Title** field names the organization type

*__Is Active__ makes the files visible to the users

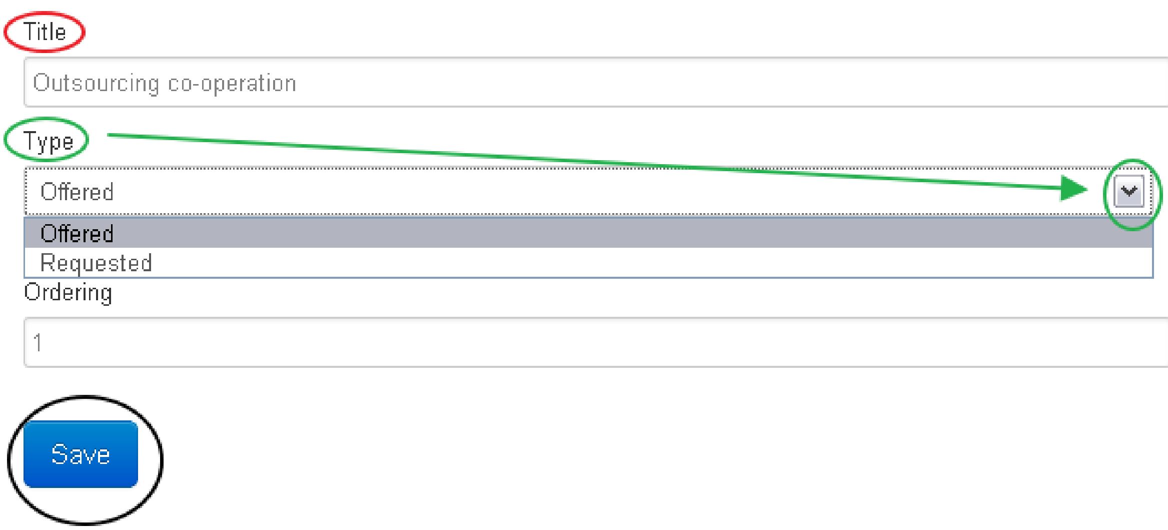
*__Save__ to record all of the additions/changes

Important: each business field will require its own title and section so repeat the steps above for each additional field.

Cooperation profiles

*__Cooperative Types__ from the drop-down menu is used to specify the type of cooperation. The list of different options will be presented to users during the signup process.

*__New Cooperation Type__ is used to add new options



*__Title__ enter the name of the cooperation type

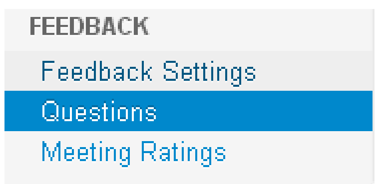
*__Type__ select the ‘offered’ or ‘request’ option depending on if you are looking for or providing offerings

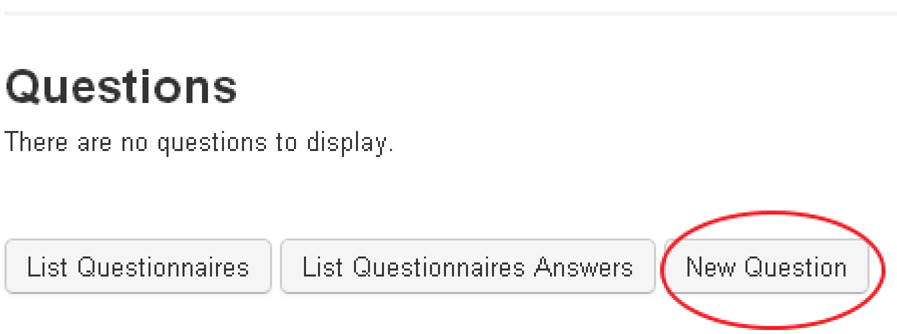
*__Is Active__ makes the files visible to the users

* __Save__ to record all of the additions/changes

Important: in case that a certain cooperation type is in both ‘offered’ and ‘request’ fields, first select ‘Offered’ option form the Type menu and add the data. Next, under New Cooperation Type enter the same Title and select ‘Requested’. Save all work at the end.

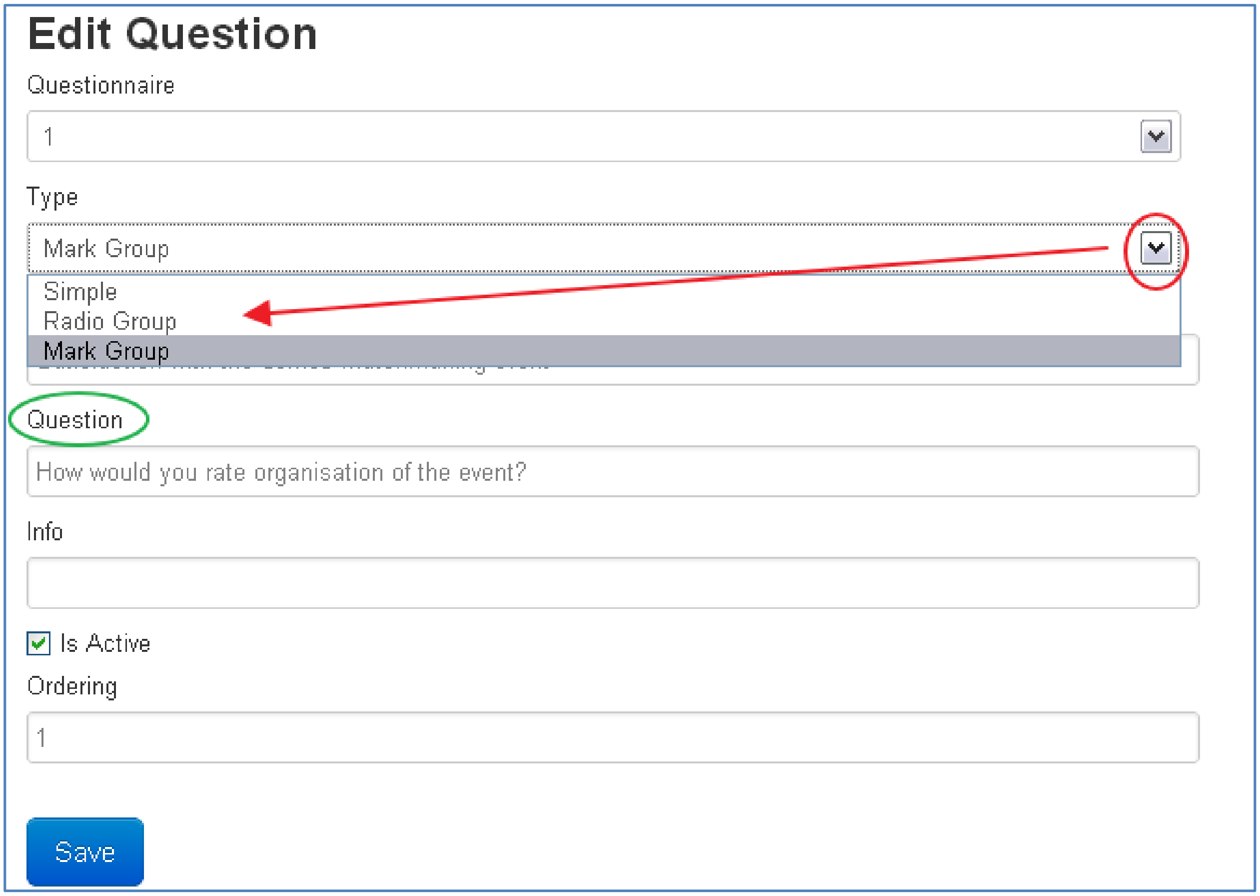
Feedback





*__Questions__ field from the drop-down menu is used for viewing the survey information

*__New question option__ opens the form for creating questions for a new survay



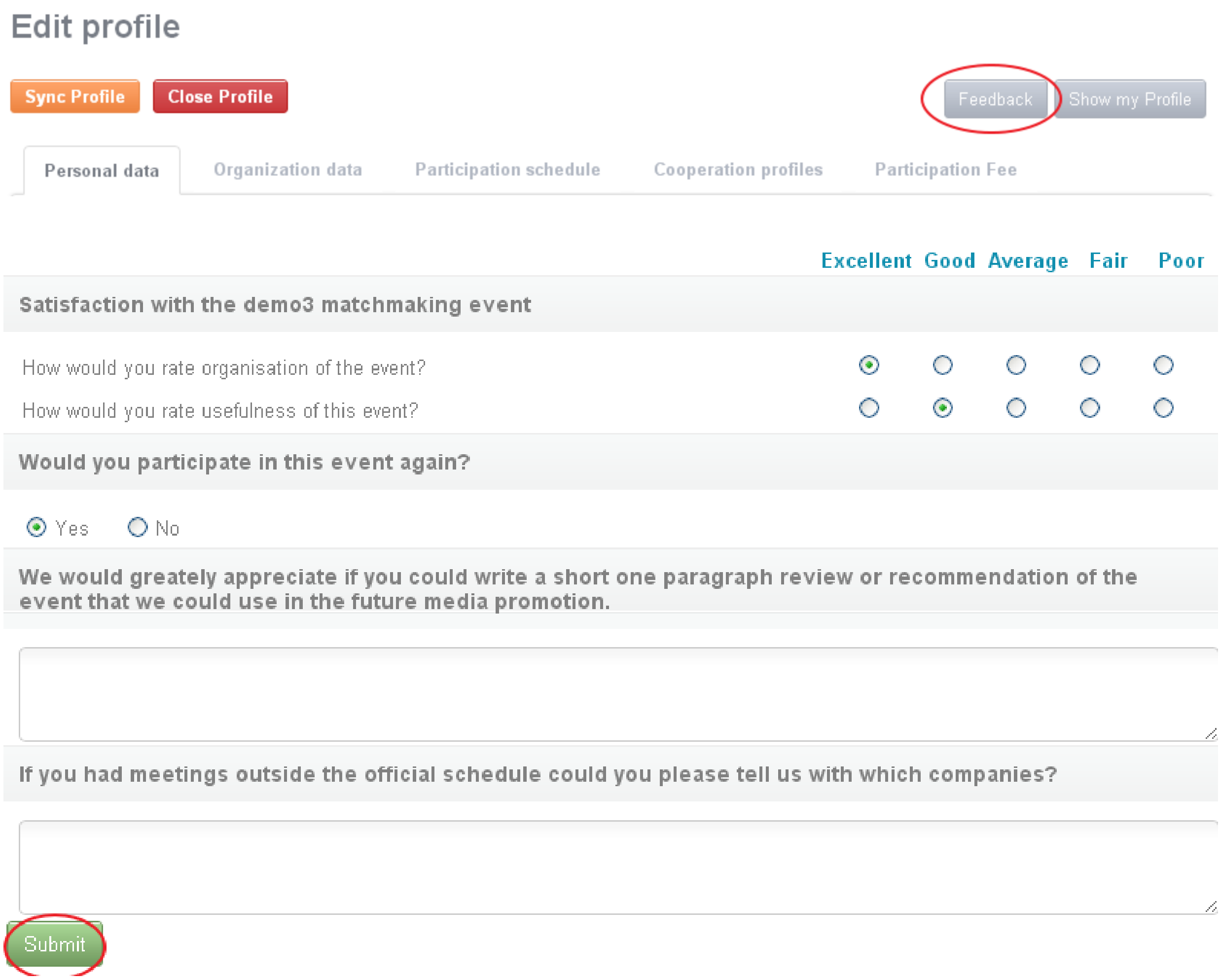
*__Type__ select the type of survey from three option: Simple,Radio Group and Mark Group

*__Simple__ survey is the option where the users are able to entre the answer on their own

*__Radio Group__ survey is the option where the users are able to select the option from a pre-determined set.

*__Mark Group__ survey is the option where the users are able to rate the entire event

*Once the **Mark Group** option is selected, and **Question** field is visible, you can insert your questions and the system will add the grading options (Great, Good, Average and Bad)

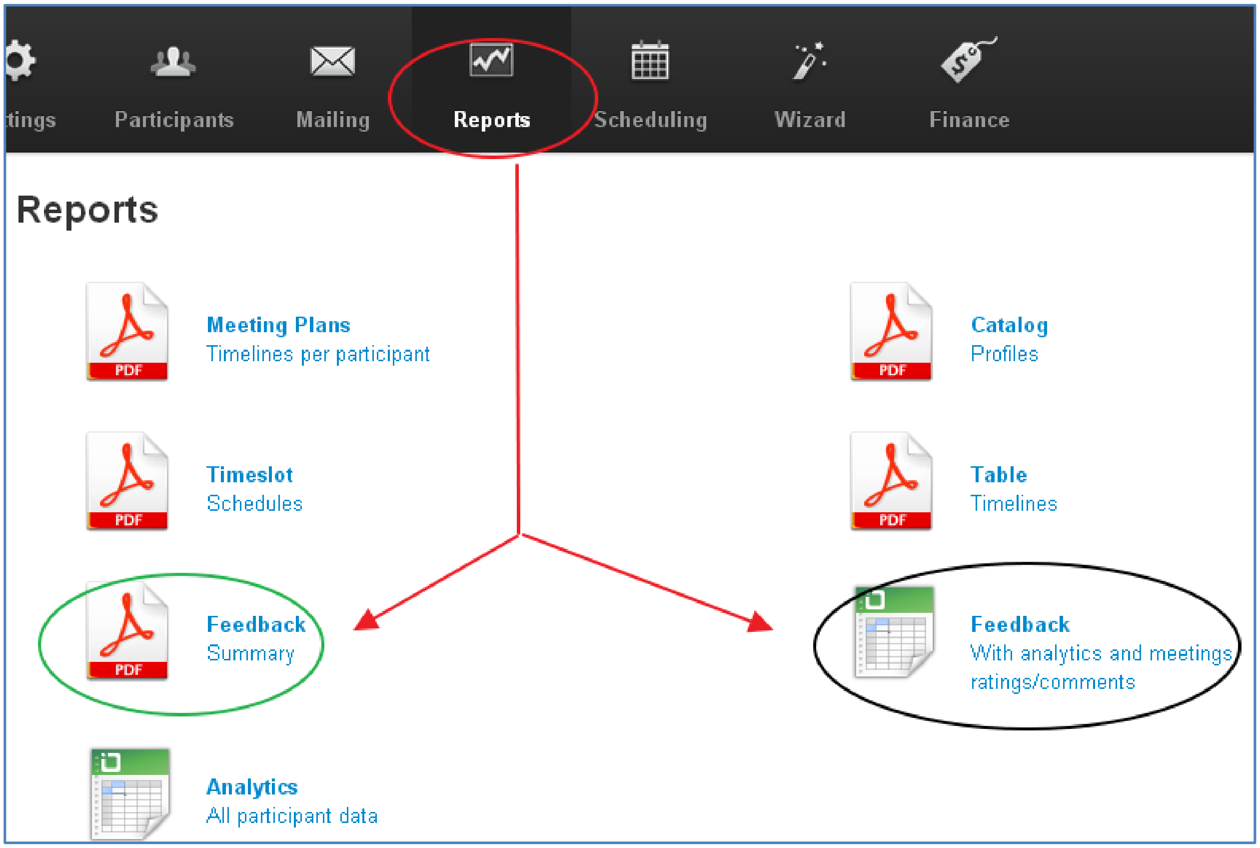


Survey Example

*Feedback field will open the survey on the users profile page

*Submit will complete and send you the completed survey

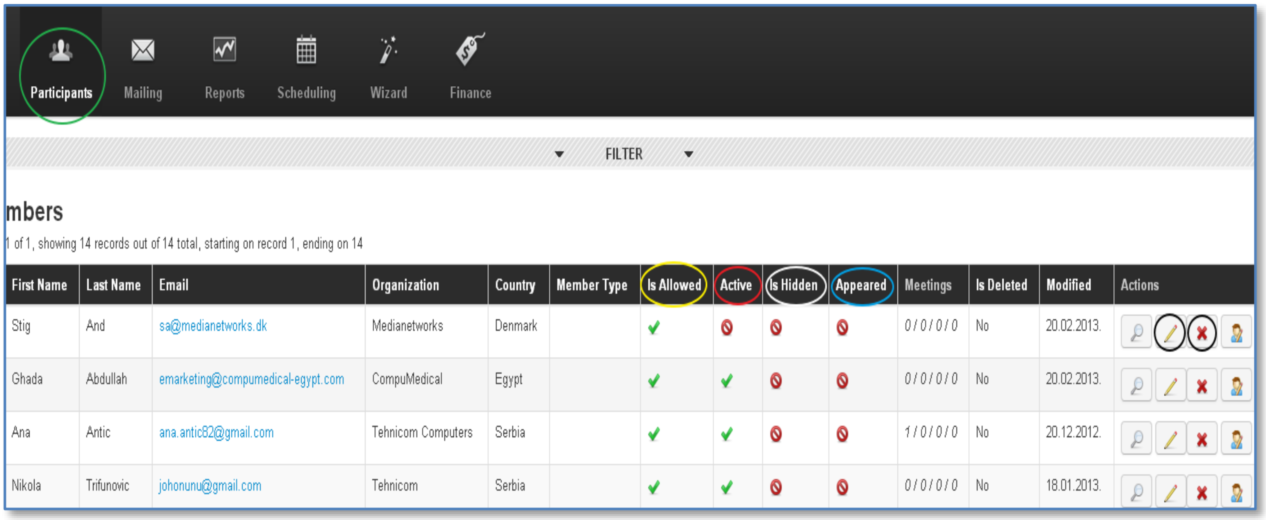
As an organizer you will have access to see all of the survey results in a sigle document



From the top meny select **Reports** and find **Feedback** documents in either PDF or Excel format

Participants

Participants from the top menu is reserved for event users. By accessing this menu you have a list of all users and their profiles



***Is Allowed** allows you to control each users ability to request meetings

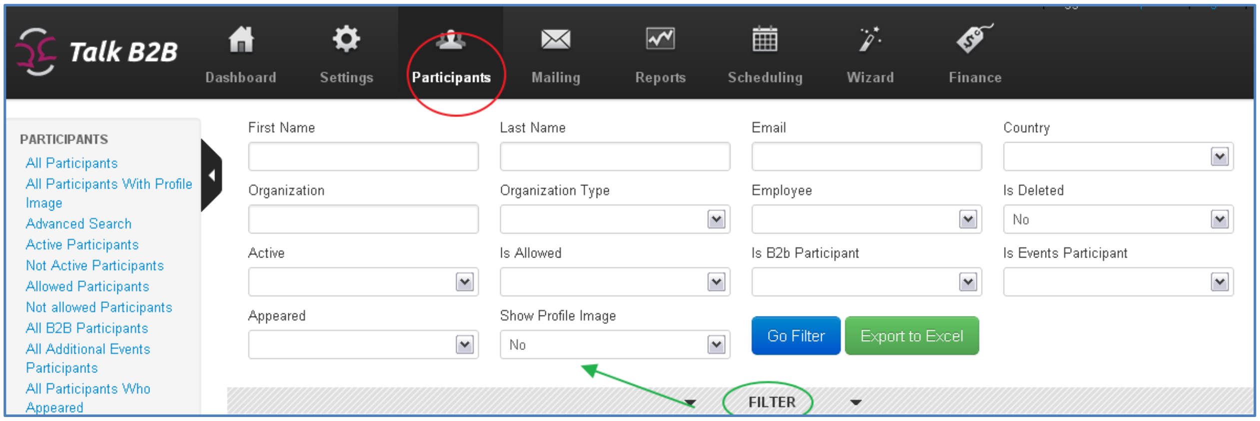
***Active** allows you to manually activate/deactivate users, unless you selected Automatic Activation. Users will not be able to proceed with the profile creation without your activation.

***Is Hidden** allows you to hide/show users with unfinished profiles. After they complete their profiles, with a click on **Is Hidden** button their profile becomes visible.

***Appeared** allows you to check off which users were present at their appointments during your event

***Meetings** an overview of sending and receiving of meeting requests. Our system keeps track of this data and you can have access to this data in real time.

*Edit (yellow pencil icon) allows you to view and edit each users information. You can alter all of the fields except for the log in and password information.



***Filter** can alter the way the list is organizer

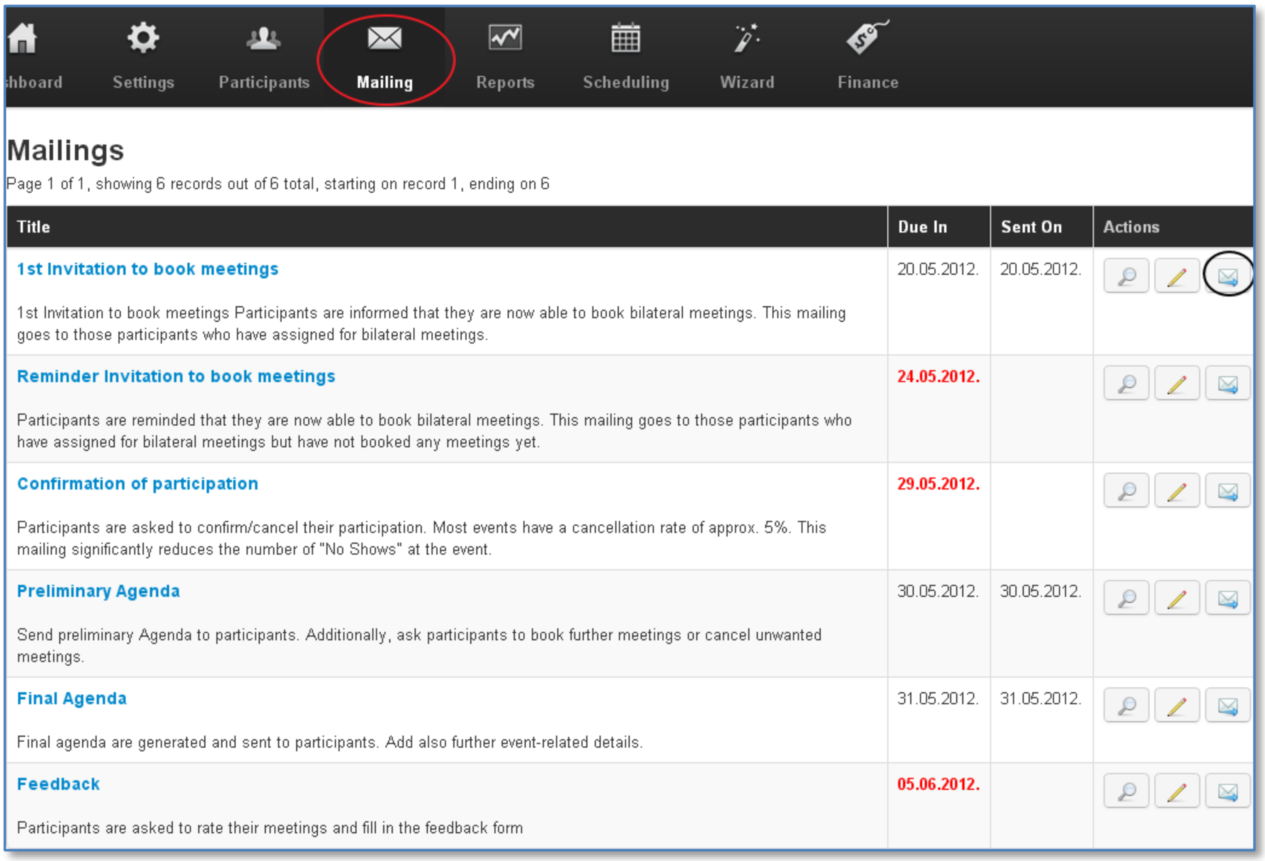
The left side of the screen contains a box with menu items that you can use to filter the users. For example you can view the users who participated in the B2B meetings, active users or participants of specific events.

***Go Filter** will allow you to perform the operation

***Export to Excel** will create a document with a list of participants

Mailing

Mailing from the top menu, provides the administrator with several predefined e-mail messages which can be sent at specific times.



Mailings

Page 1 of 1, showing 6 records out of 6 total, starting on record 1, ending on 6

Title	Due In	Sent On	Actions
1st Invitation to book meetings 1st Invitation to book meetings Participants are informed that they are now able to book bilateral meetings. This mailing goes to those participants who have assigned for bilateral meetings.	20.05.2012.	20.05.2012.	
Reminder Invitation to book meetings Participants are reminded that they are now able to book bilateral meetings. This mailing goes to those participants who have assigned for bilateral meetings but have not booked any meetings yet.	24.05.2012.		
Confirmation of participation Participants are asked to confirm/cancel their participation. Most events have a cancellation rate of approx. 5%. This mailing significantly reduces the number of "No Shows" at the event.	29.05.2012.		
Preliminary Agenda Send preliminary Agenda to participants. Additionally, ask participants to book further meetings or cancel unwanted meetings.	30.05.2012.	30.05.2012.	
Final Agenda Final agenda are generated and sent to participants. Add also further event-related details.	31.05.2012.	31.05.2012.	
Feedback Participants are asked to rate their meetings and fill in the feedback form	05.06.2012.		

***Edit** (Yellow pencil icon) will allow you to alter content of each message

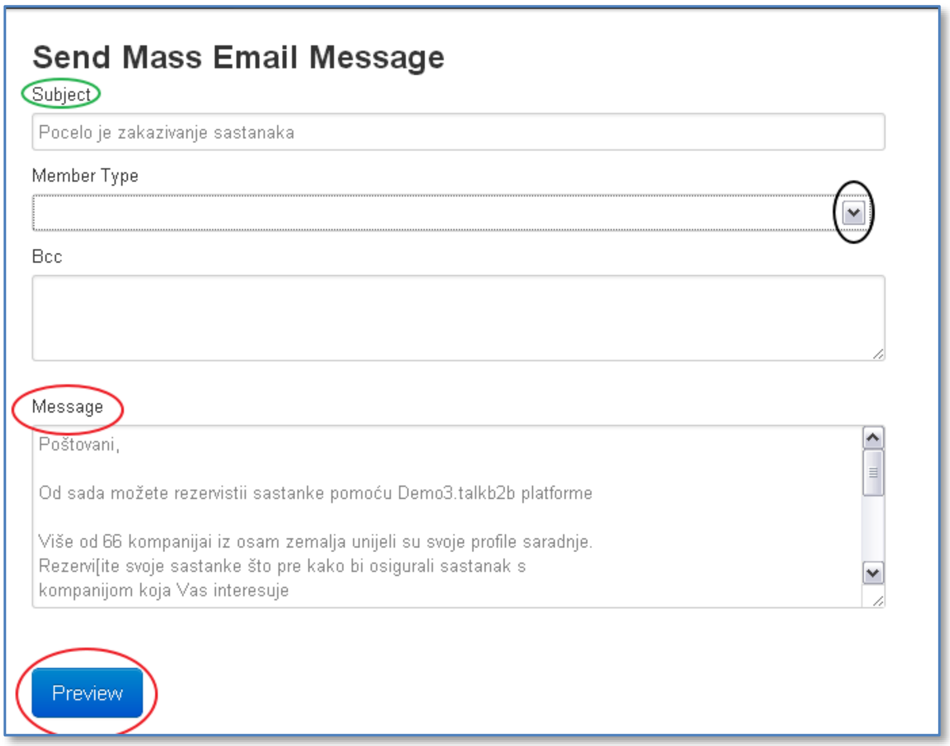
***Send** (Envelope icon) is an option for sending each message type. Selecting the icon will open a detailed window with all of the message content.

***Preview** will open the window with message content and list of all user addresses. You can sort the users individually or by selecting one of the options.

***Send** will create and send the messages to each user, addressed individually

Send Mass E-mail Message

*__Send Mass E-mail Message__ select in case that you want to send a custom message to the large group of event participants



A new window will apear to guide you through the process

*__Subject__ insert the message heading

*__Member Type__ select the user group you want to send the message to

*__Message__ insert the message text

*__Preview__ check the message layout

*__Send__ message goes out to the user group

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