

TalkB2B Platform Instruction Guide

for event organizers

CMS System Use

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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

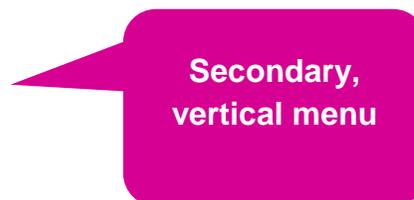
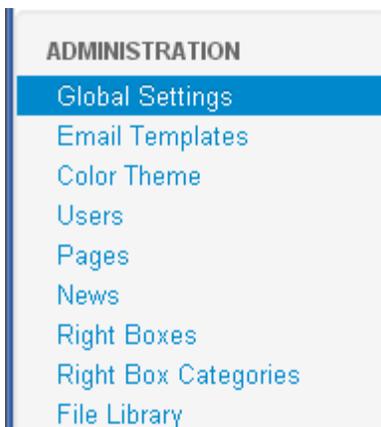
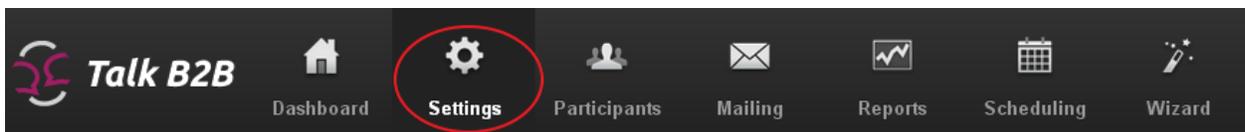
The list “what You can do” is long, and the real question is **“How can I do all of that?”**

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 active 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		Email Templates					
Global Settings		Page 1 of 1, showing 10 records out of 10 total, starting on record 1, ending on 10					
Email Templates		Id		Subject	Type	Created	Actions
Color Theme		10		Meeting accepted	On meeting accepted	10.05.2012.	  
Users		9		You are now allowed to schedule meetings	On member allowed	07.05.2012.	  
Pages		8		Meeting requested	On meeting auto-arranged	25.04.2012.	  
News							
Right Boxes							
Right Box Categories							
File Library							

***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

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.	  
<div style="text-align: center;"> < > </div> <div style="text-align: center; margin-top: 10px;"> Add new page </div>							

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

Edit Page - Home

Belongs To

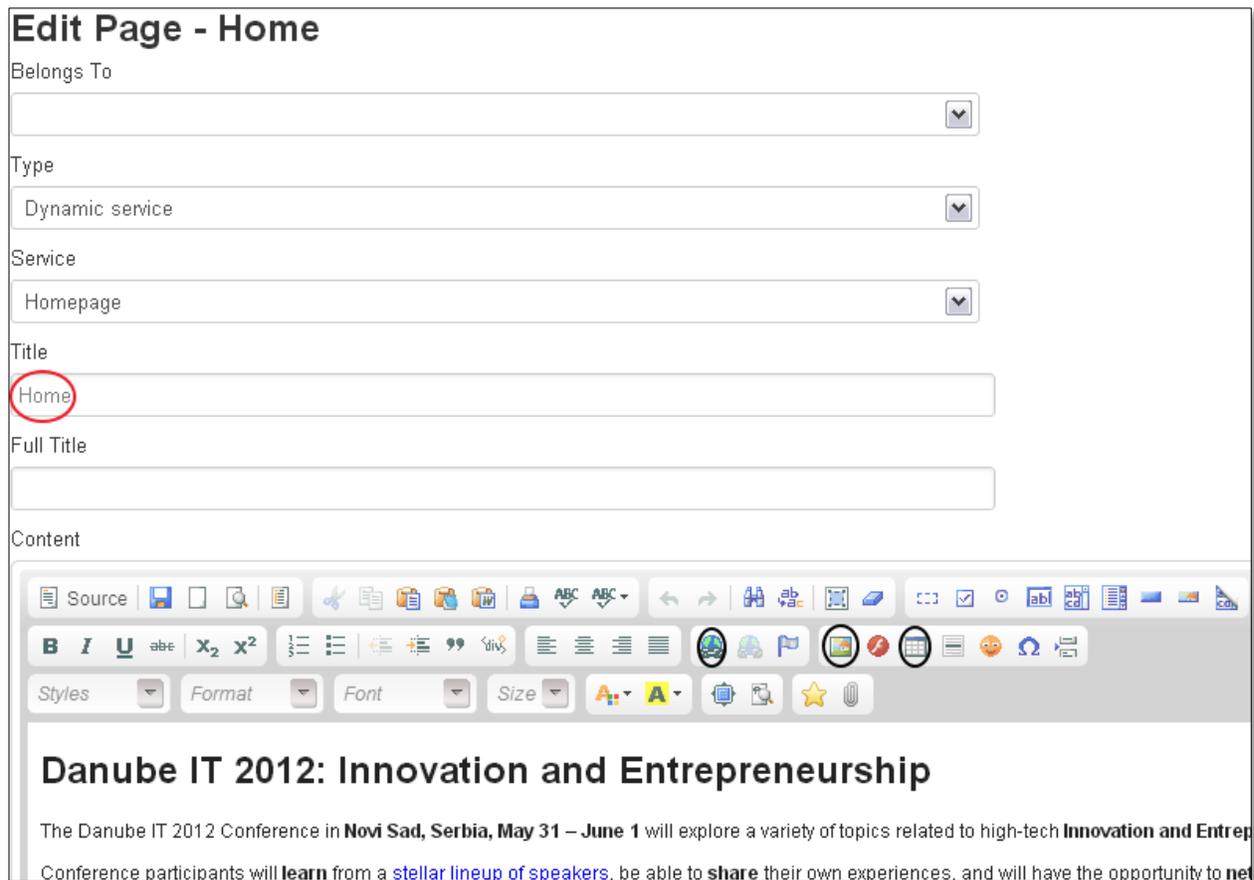
Type

Service

Title

Full Title

Content



Danube IT 2012: Innovation and Entrepreneurship

The Danube IT 2012 Conference in **Novi Sad, Serbia, May 31 – June 1** will explore a variety of topics related to high-tech **Innovation and Entrep**

Conference participants will **learn** from a [stellar lineup of speakers](#), be able to **share** their own experiences, and will have the opportunity to **net**

***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

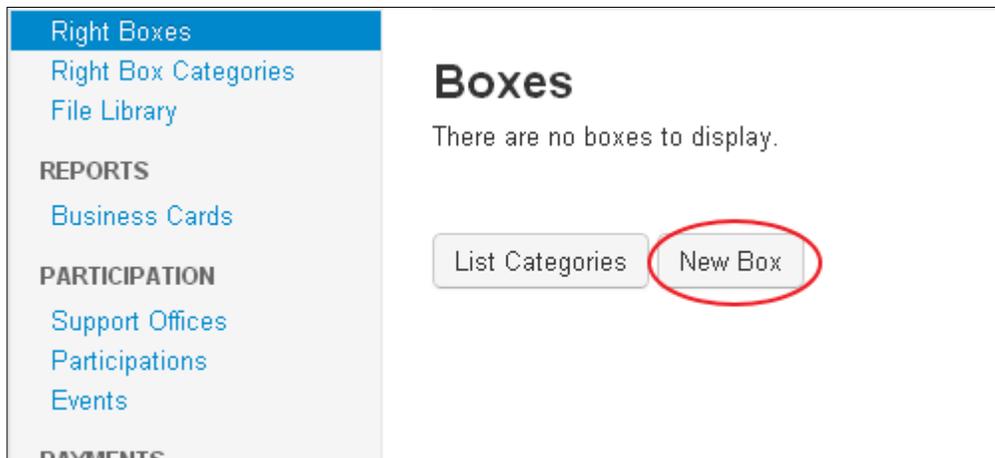
***Is Visible** controls if the page is live

***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...)



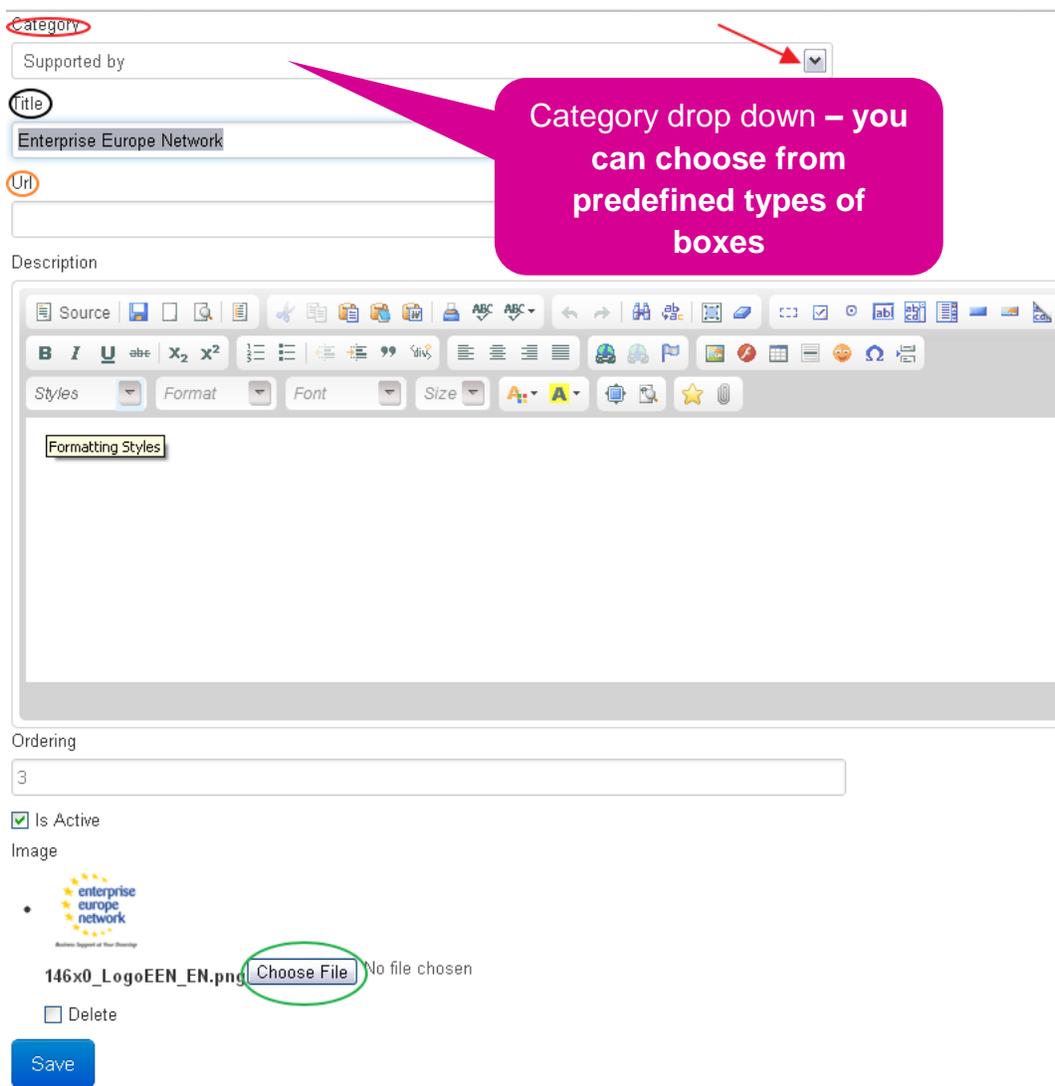
Your photos are placed on the right side of your page, as well as the event address and organization's logo, support info, etc.

***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



Category

Supported by

Title

Enterprise Europe Network

Uri

Description

Ordering

3

Is Active

Image

enterprise europe network

146x0_LogoEEN_EN.png Choose File No file chosen

Delete

Save

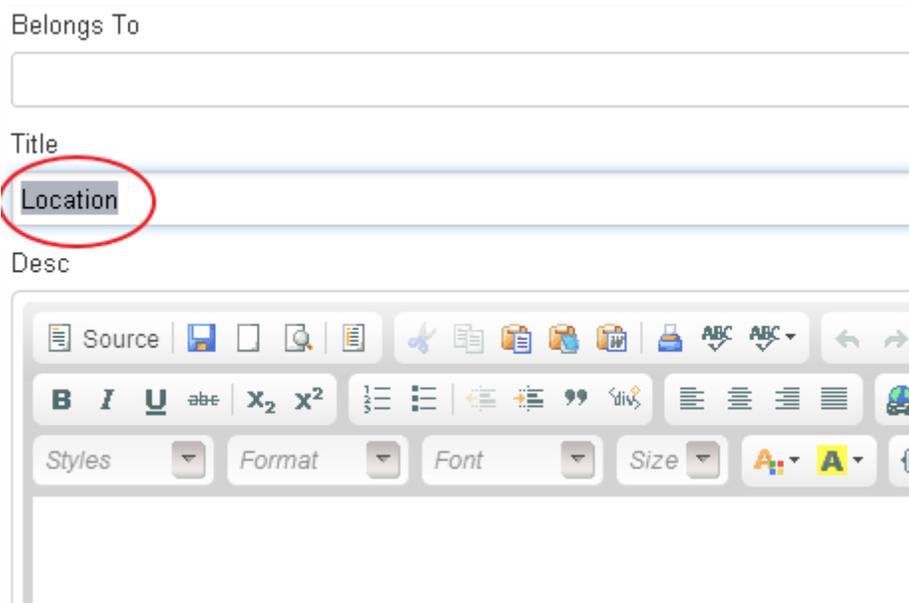
So far you've created only the category

Belongs To

Title

Location

Desc



* **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.

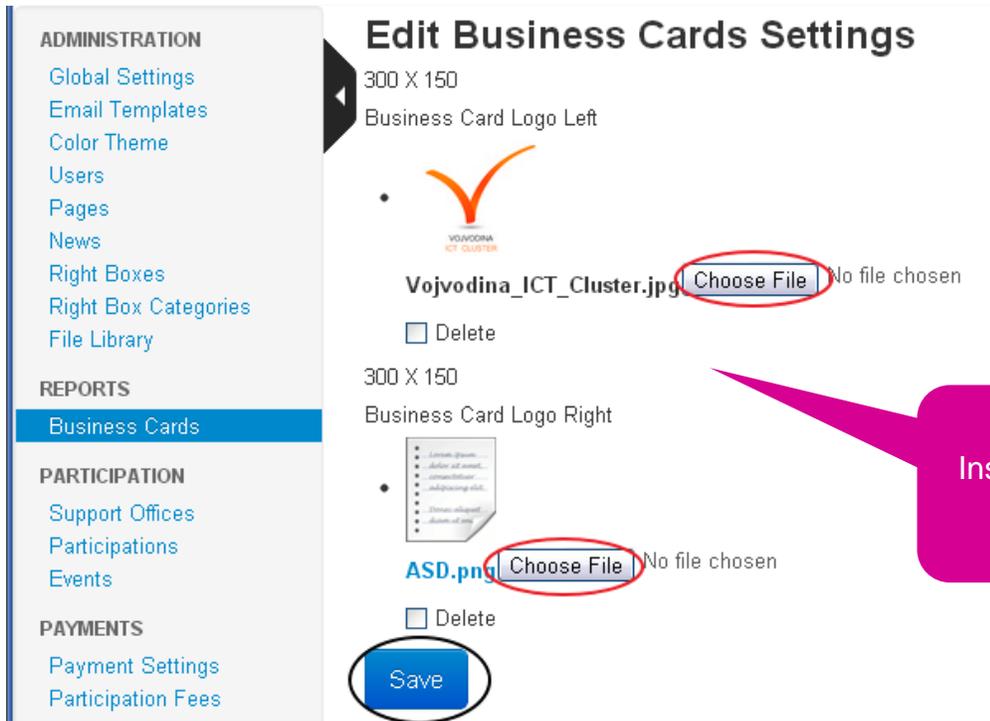
Your ID cards are created in just 2 steps!

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

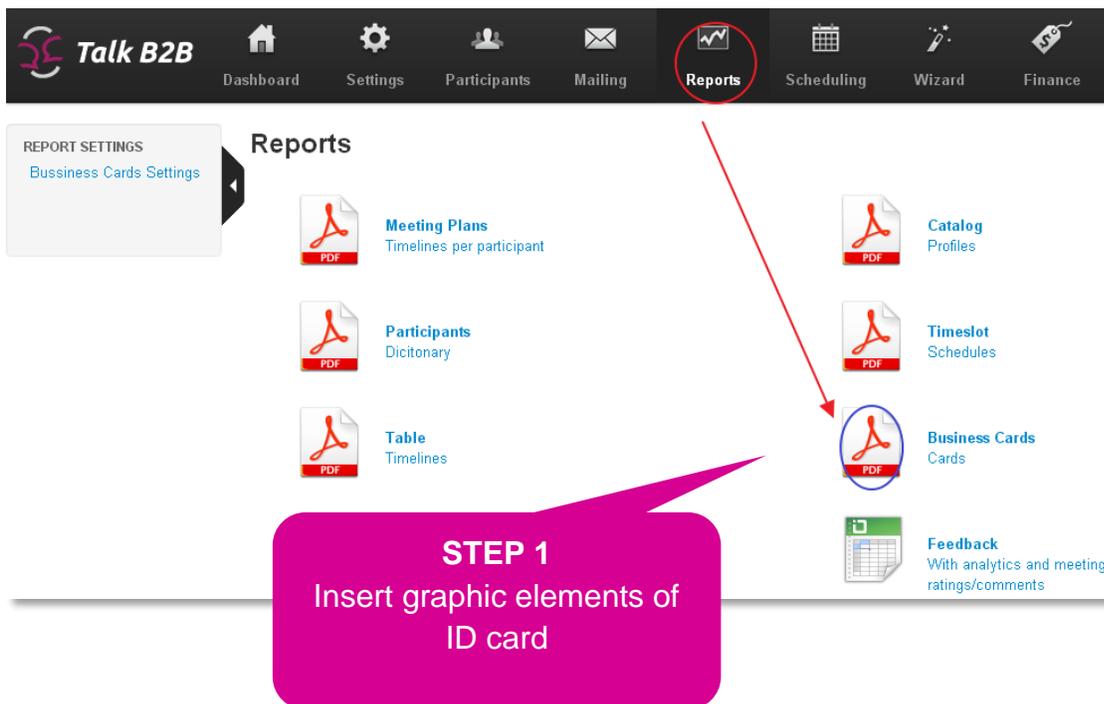
300 X 150
Business Card Logo Right


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
Business Cards Settings

Reports

-  **Meeting Plans**
Timelines per participant
-  **Participants**
Dictionary
-  **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.

LECTURERS

Lecturers

Lecturer Fields

Conference Rooms

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

Topic
future of IT

Is accepted

Is Accepted

Do not forget to choose the Conference Room

Conference Room
Velika Sala

Held On
18 February 2013

Start
1 : 00 pm

End
2 : 00 pm

Image

Choose File No file chosen
 Delete

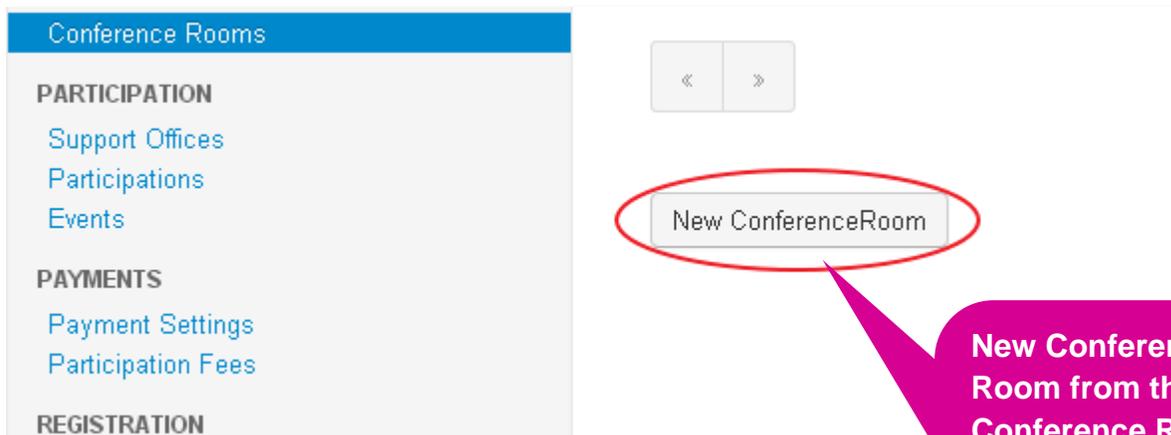
Document
Choose File No file chosen

Max Participants
50

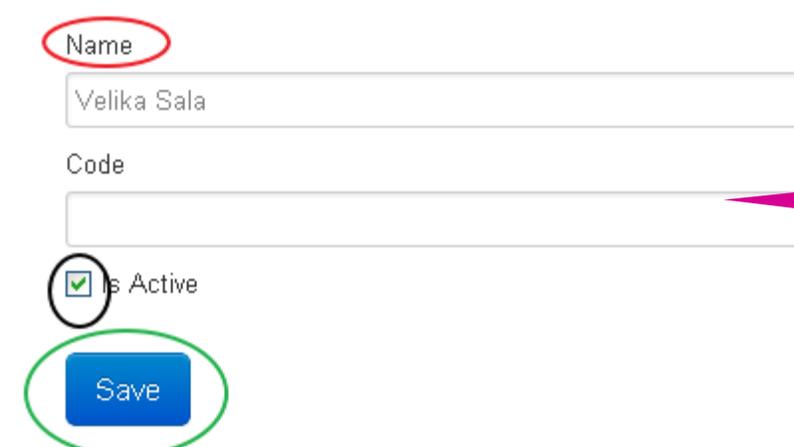
Save

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:

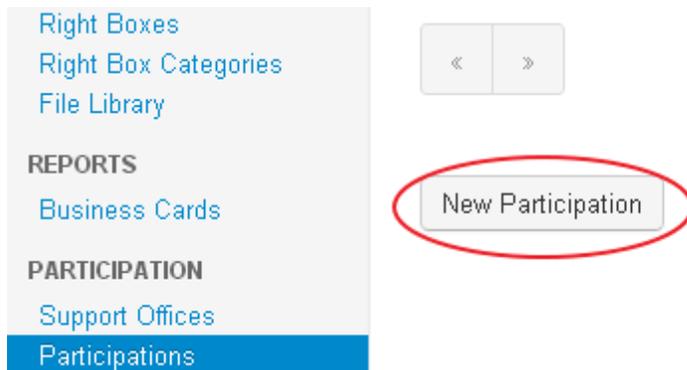
- Create a list of support offices
- Set the date and time of the start and end events
- Manage a list of supporting additional events

Support Offices

PARTICIPATION			
Support Offices	5	BG - Enterprise Europe Network Bulgaria	
Participations			
Events	6	CY - Business Support Centre	
PAYMENTS			
Payment Settings			
Participation Fees	7	CZ - South Moravian Innovation Centre	

***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

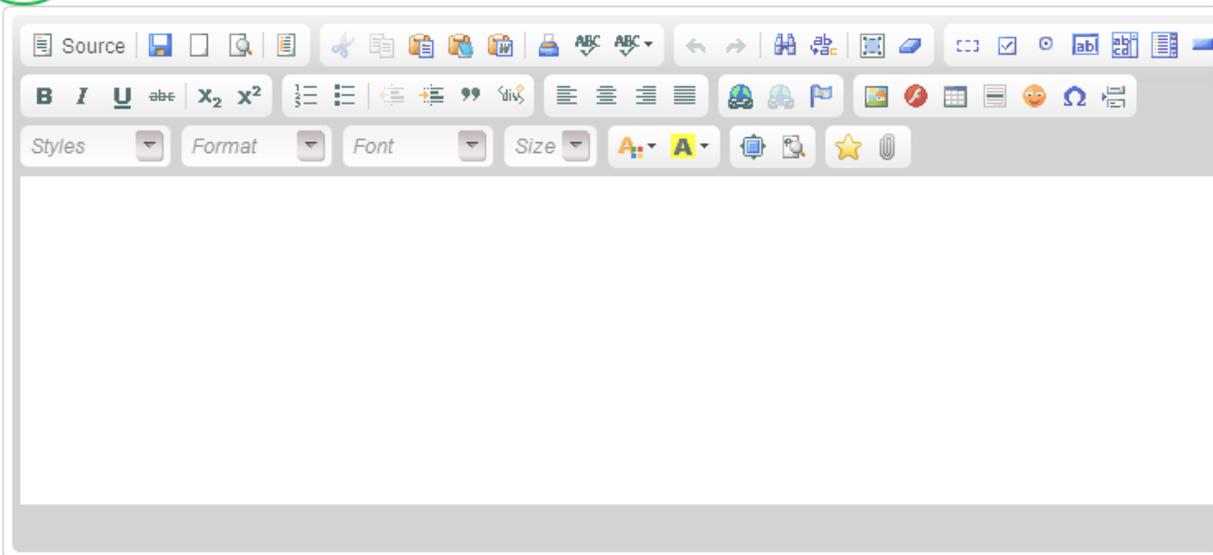
***Max Participants** insert the max number of participants (if needed)

***Is Active** makes the event go live

Edit Event

Title

Text



Max Participants

Is Active

Held On

18 February 2013

Start

2 : 00 am

End

4 : 00 am

Save

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

REGISTRATION

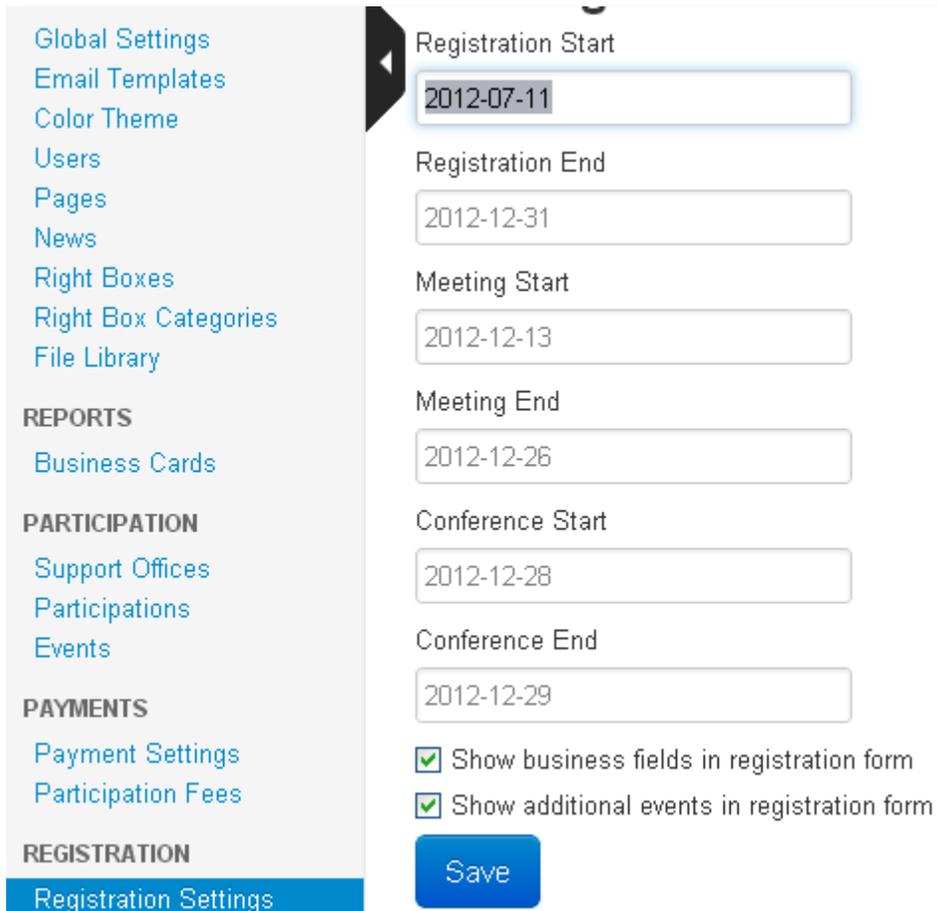
- Registration Settings
- Registration Fields
- Organisation Types
- Organisation Size
- Areas of Activity
- Regions
- Cities
- Languages
- Member Types

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 multilingual 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.



The screenshot shows the 'Registration Settings' page. On the left is a navigation menu with categories: 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), and REGISTRATION (Registration Settings). The main content area contains the following settings:

- Registration Start: 2012-07-11
- Registration End: 2012-12-31
- Meeting Start: 2012-12-13
- Meeting End: 2012-12-26
- Conference Start: 2012-12-28
- Conference End: 2012-12-29
- Show business fields in registration form
- Show additional events in registration form
- Save** button

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

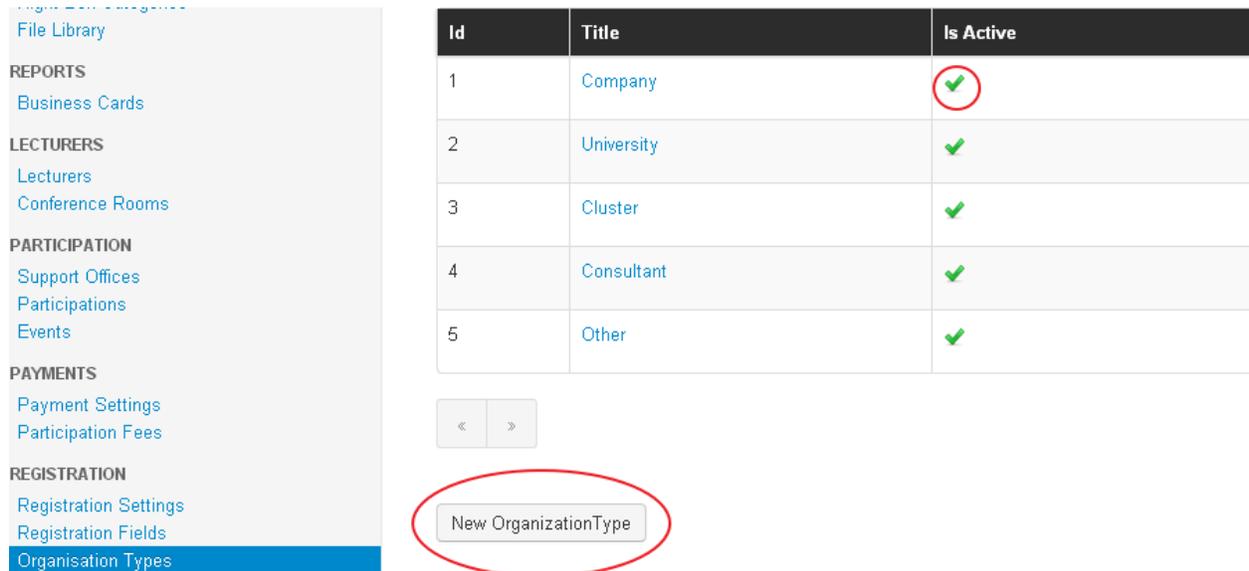
REGISTRATION
Registration Settings
Registration Fields
Organisation Types
Organisation Size
Areas of Activity
Regions

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

***Is Active** allows each field to be added to the registration

***Is Required** allows each field to be selected as a required on the form

Organization Types



Id	Title	Is Active
1	Company	✓
2	University	✓
3	Cluster	✓
4	Consultant	✓
5	Other	✓

< >

New OrganizationType

***Organization Types** selects preset organization type

***Is Active** option controls if the organization will be visible or not

New OrganizationType

Title

 Is Active
Ordering

***New Organization** type allows you to add a custom type

***Title** inser the name of the organization

***Is Active** activates the new type

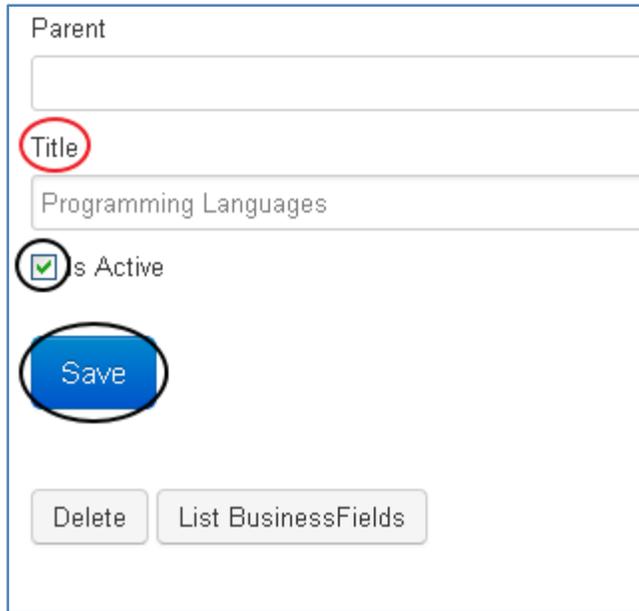
***Save** to confirm all additions or changes

REGISTRATION

[Registration Settings](#)
[Registration Fields](#)
[Organisation Types](#)
[Organisation Size](#)
[Areas of Activity](#)

List Business Fields

New BusinessField



Parent

Title

Programming Languages

Is Active

Save

Delete List BusinessFields

***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

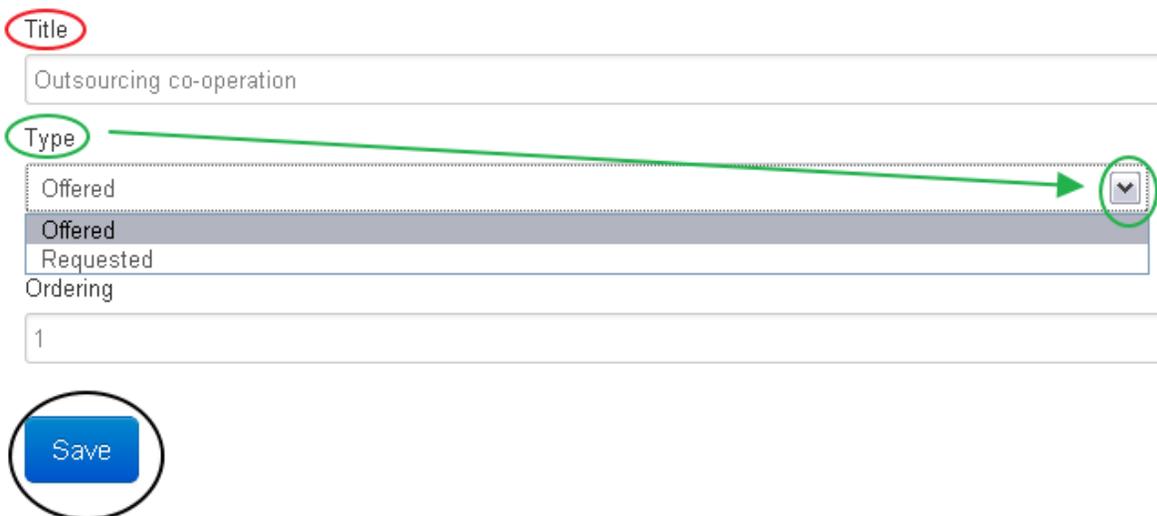
Important: each business field will require its own title and section so repeat the steps above for each additional field.

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
Outsourcing co-operation

Type
Offered
Offered
Requested
Ordering

1

Save

***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

Feedback

FEEDBACK
Feedback Settings
Questions
Meeting Ratings

Important: in case that a certain cooperation type is in both 'offered' and 'request' fields, first select 'Offered' option from 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.

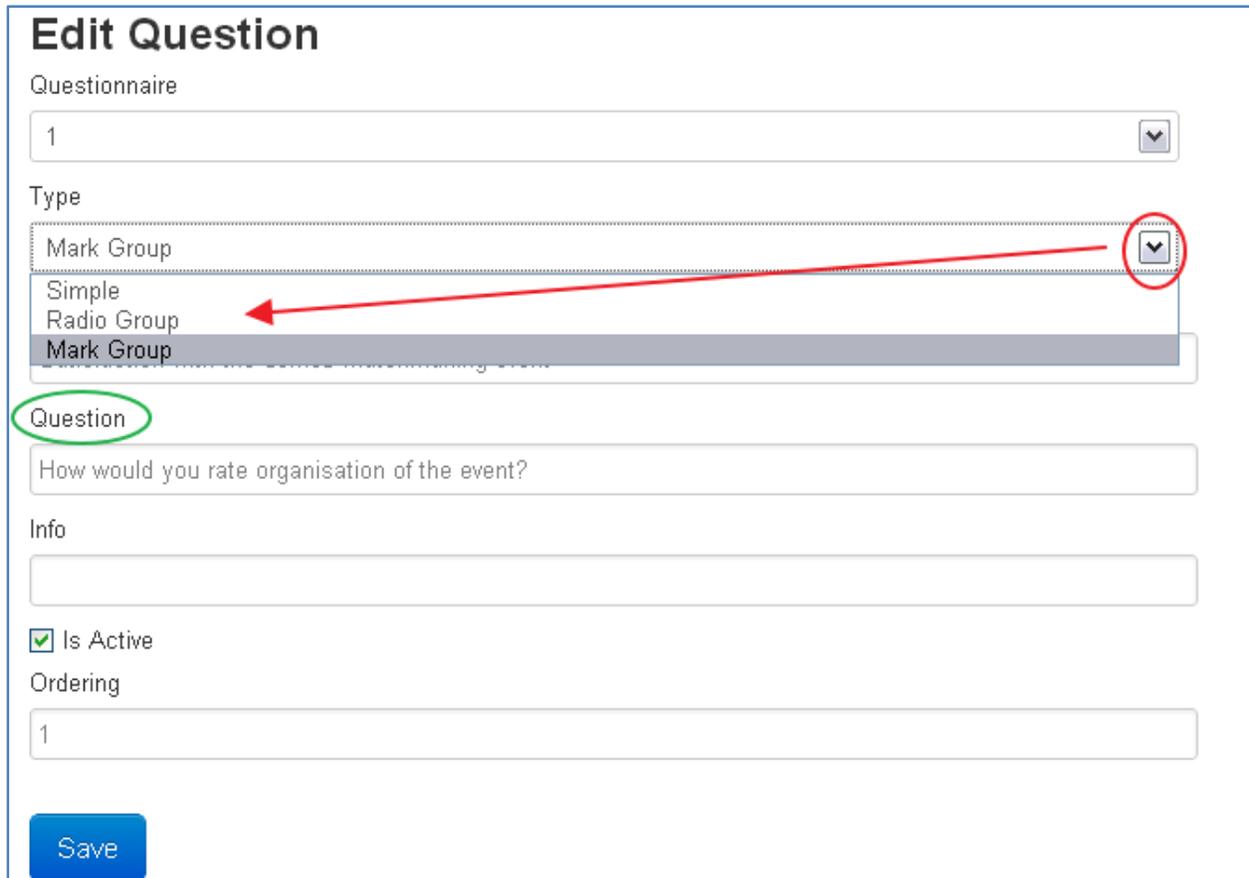
Questions

There are no questions to display.



***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 survey



Edit Question

Questionnaire

1

Type

Mark Group

Simple

Radio Group

Mark Group

Question

How would you rate organisation of the event?

Info

Is Active

Ordering

1

Save

***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 enter 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)

Edit profile

[Sync Profile](#)[Close Profile](#)[Feedback](#)[Show my Profile](#)[Personal data](#)[Organization data](#)[Participation schedule](#)[Cooperation profiles](#)[Participation Fee](#)**Excellent Good Average Fair Poor**

Satisfaction with the demo3 matchmaking event

How would you rate organisation of the event?



How would you rate usefulness of this event?



Would you participate in this event again?

 Yes No

We would greatly appreciate if you could write a short one paragraph review or recommendation of the event that we could use in the future media promotion.

If you had meetings outside the official schedule could you please tell us with which companies?

[Submit](#)

Survey Example

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

*Submit will complete and send you the completed survey

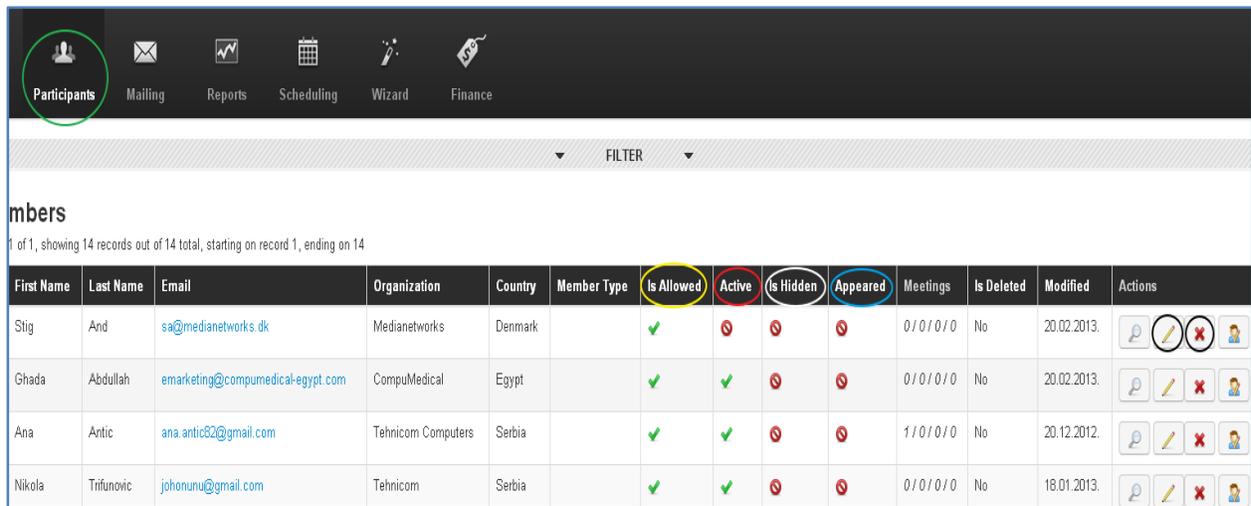
As an organizer you will have access to see all of the survey results in a sigle document



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



First Name	Last Name	Email	Organization	Country	Member Type	Is Allowed	Active	Is Hidden	Appeared	Meetings	Is Deleted	Modified	Actions
Stig	And	sa@medianetworks.dk	Medianetworks	Denmark		✓	✗	✗	✗	0 / 0 / 0 / 0	No	20.02.2013.	   
Ghada	Abdullah	emarketing@compumedical-egypt.com	CompuMedical	Egypt		✓	✓	✗	✗	0 / 0 / 0 / 0	No	20.02.2013.	   
Ana	Antic	ana.antic82@gmail.com	Tehnicom Computers	Serbia		✓	✓	✗	✗	1 / 0 / 0 / 0	No	20.12.2012.	   
Nikola	Trifunovic	johonunu@gmail.com	Tehnicom	Serbia		✓	✓	✗	✗	0 / 0 / 0 / 0	No	18.01.2013.	   

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

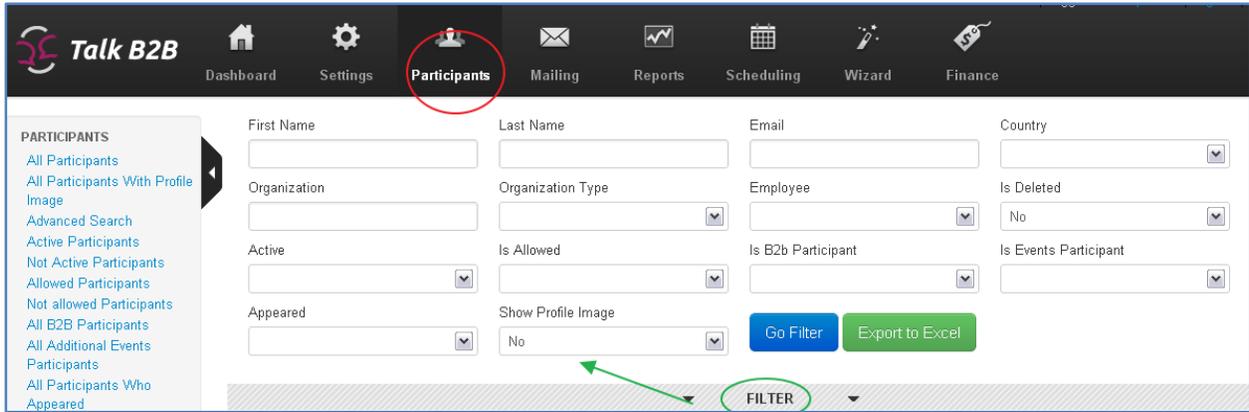
***Active** allows you to manually activate/deactivate users, unless you selected Automatic Activation. Users will not be able to proceed with the profile creation without your activation.

***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.



The screenshot shows the 'Participants' management interface. The top navigation bar includes 'Dashboard', 'Settings', 'Participants' (circled in red), 'Mailing', 'Reports', 'Scheduling', 'Wizard', and 'Finance'. The left sidebar lists various participant filters such as 'All Participants', 'Active Participants', and 'All B2B Participants'. The main form contains fields for 'First Name', 'Last Name', 'Email', 'Country', 'Organization', 'Organization Type', 'Employee', 'Is Deleted', 'Active', 'Is Allowed', 'Is B2b Participant', 'Is Events Participant', and 'Appeared'. There are also 'Go Filter' and 'Export to Excel' buttons. A green arrow points from the 'Go Filter' button to the 'FILTER' dropdown menu at the bottom of the form.

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

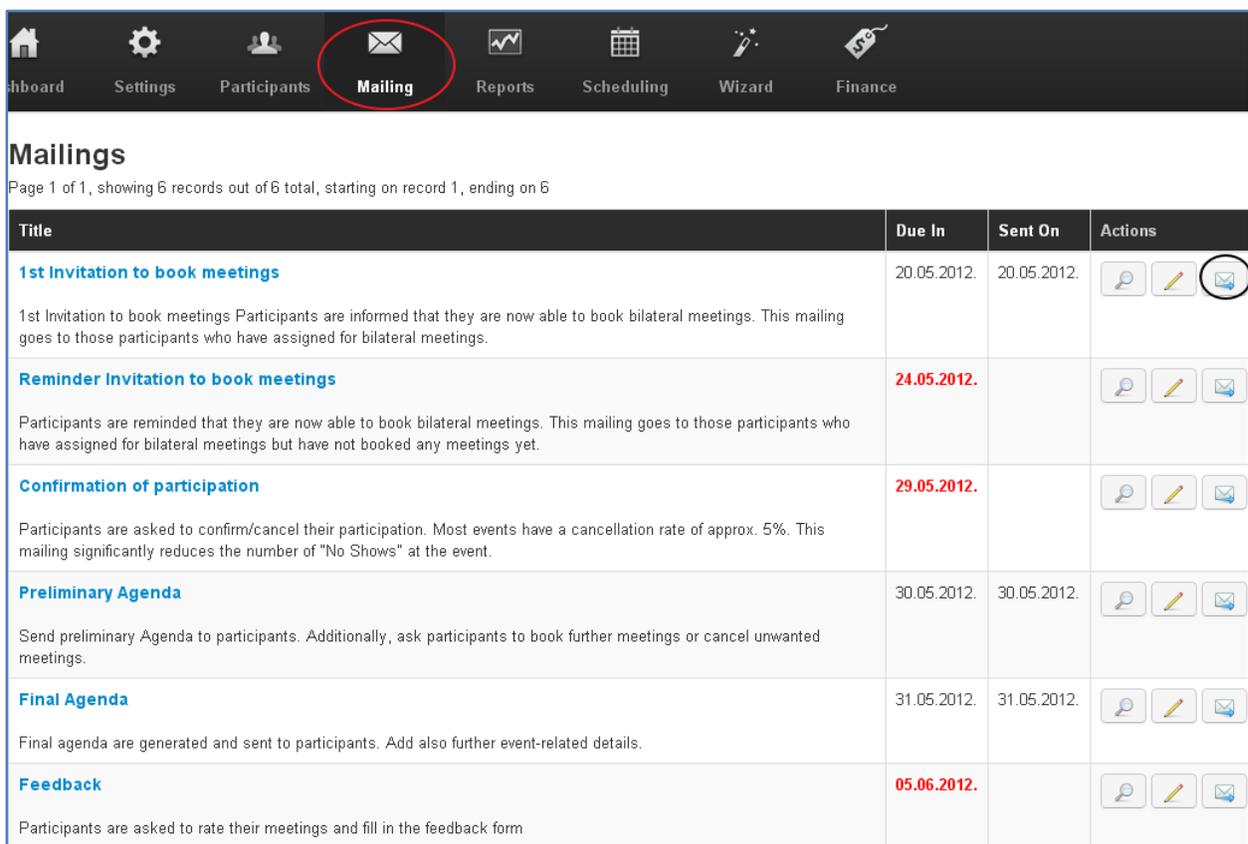
The left side of the screen contains a box with menu items that you can use to filter the users. For example you can view the users who participated in the B2B meetings, active users or participants of specific events.

***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.



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

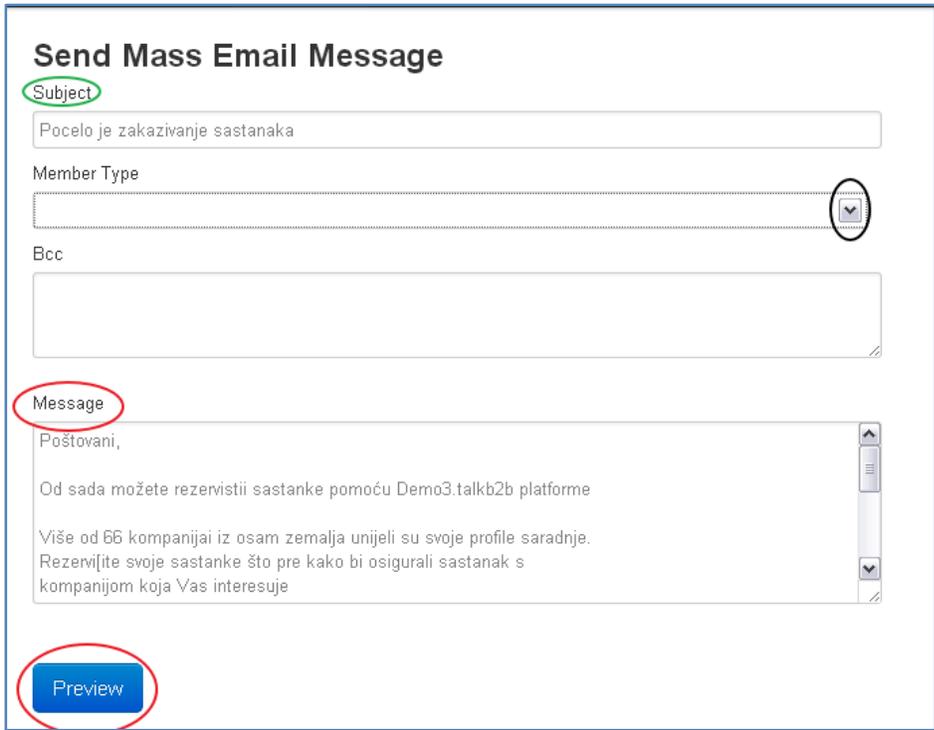
***Send** (Envelope icon) is an option for sending each message type. Selecting the icon will open a detailed window with all of the message content.

***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



Send Mass Email Message

Subject
Pocelo je zakazivanje sastanaka

Member Type
[Dropdown menu]

Bcc
[Text area]

Message
Poštovani,

Od sada možete rezervirati sastanke pomoću Demo3.talkb2b platforme

Više od 66 kompanijai iz osam zemalja unijeli su svoje profile saradnje.
Rezervirajte svoje sastanke što pre kako bi osigurali sastanak s kompanijom koja Vas interesuje

Preview

A new window will appear 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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