

TEAMS

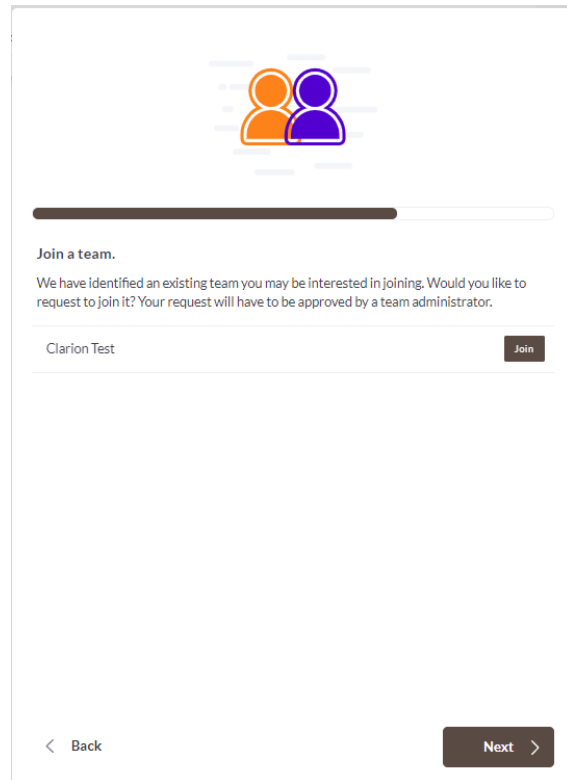
Company Profile Management

What is a Team?

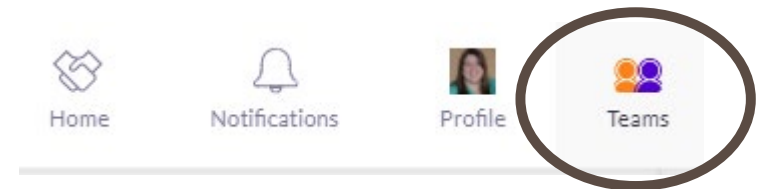
A "Team" is how you are able to have multiple vendor representatives under one company profile. This way you can manage multiple calendars, monitor leads across all representatives and more.

How to create a Team?

Upon first login, you will see the below message prompting you to join your team. Click **“Join”** to request to join your team, then click **“Next”**.

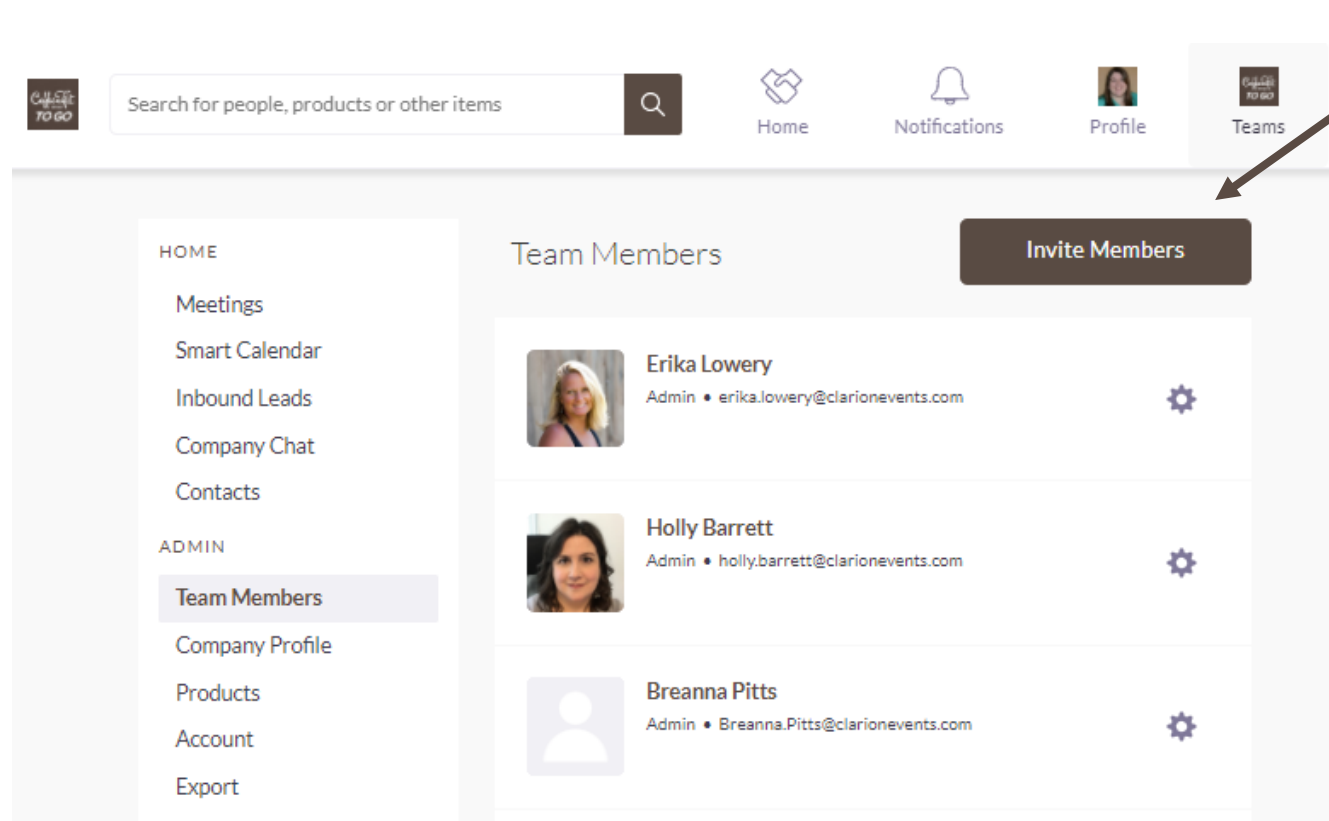


After logging in, click on **“Teams”** on the upper right of the page.



How to add a Team Member?

Click Teams on the top right, then click "Team Members". Then click "Invite Members" to add a Team Member, up to six team members. Add their name, email, job title, and role.



Team Members can access the Teams platform, including Inbound Leads, Chat, Products, Company Profile. They can also book meetings on behalf of other Team Members and can view the entire calendar.

Admins have all rights of a Team Member, but they can also invite additional Team Members and edit individual profiles.

Once invited, a team member will receive an email notification inviting them to the platform.

How to update your Company Profile?

The first representative to log in for your company will set up your company profile. Once your Team is set up and other vendor representatives have been added, anyone on the Team may make updates.

- Click "**Teams**" on the top right-hand corner
- Then click "**Company Profile.**"
- Then edit each individual field.
- Be sure to click "**Save**" at the top.

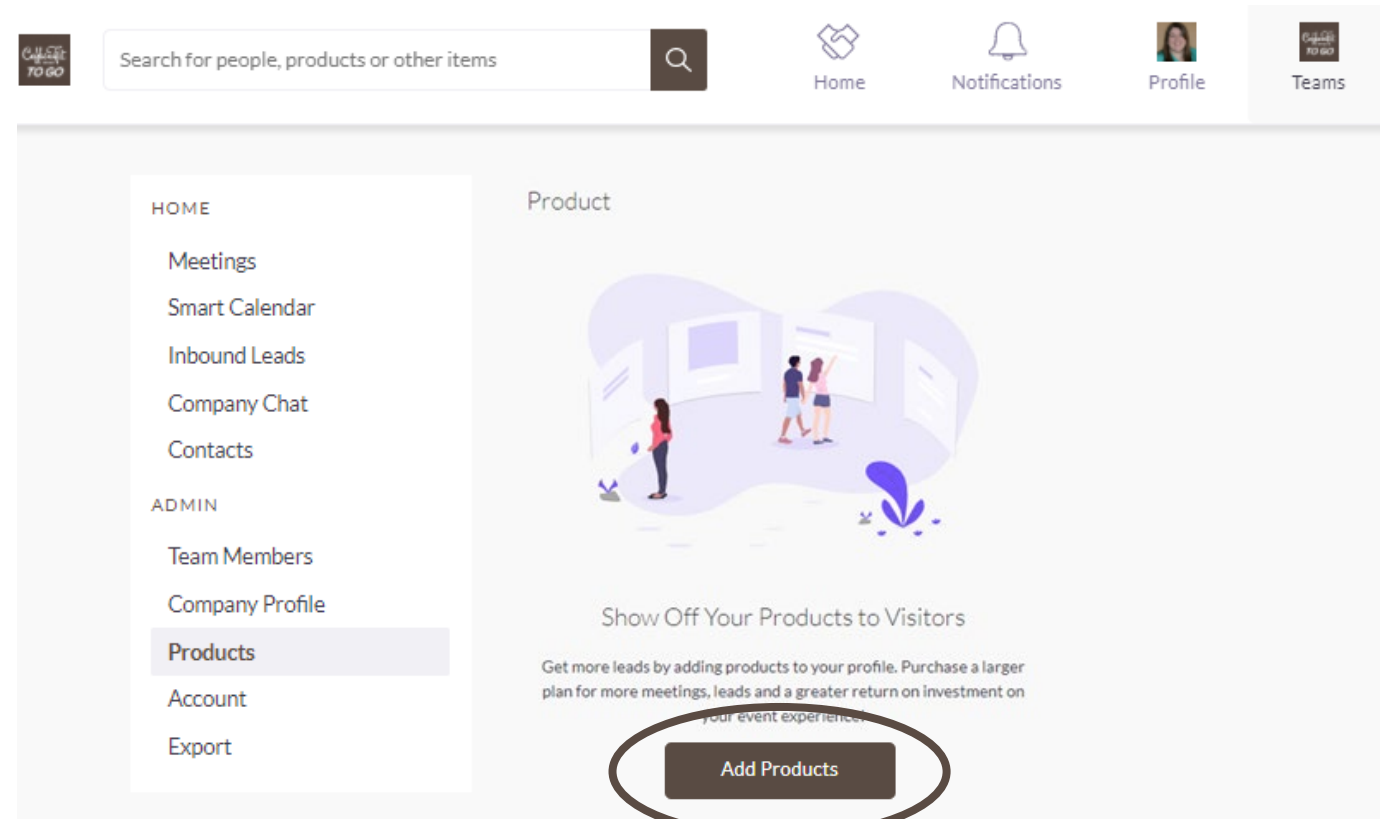
The screenshot displays the 'Coffee Fest TO GO' application interface. At the top, there is a search bar and navigation icons for Home, Notifications, Profile, and Teams. The main content area is titled 'Company Profile' and contains a form with the following fields:

- Name:** Coffee Fest
- Headline:** (empty)
- Website:** http://coffeesfest.com (1)
- Products And Services Provided:** Professional/Business Services (1)
- Video Url (Embedded On The Profile):** Click to update (0)

A red circle highlights the 'Save' button in the top right corner of the form. A black arrow points to the 'Company Profile' menu item in the left sidebar under the 'ADMIN' section.

How to add Products?

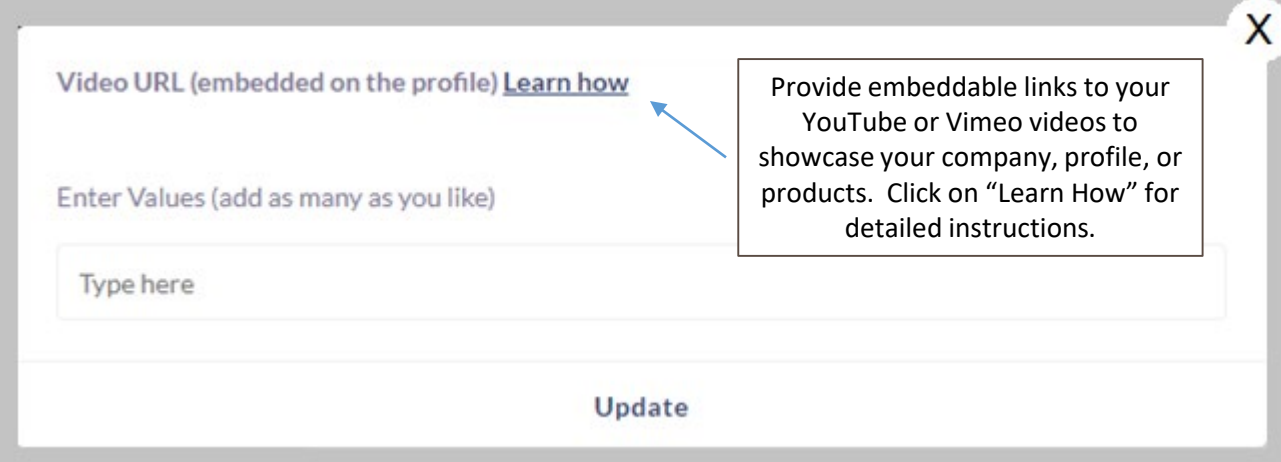
- Once logged in, click "**Teams**" on upper right-hand corner.
- To add a product, click "**Product**".
- Then click "**Add Products**" and update the following:
 - Image (from file on computer)
 - Name (Product Name)
 - Headline (one sentence line about product)
 - Website for product
 - Video URL for product
 - Document URL
 - Product Category
 - Summary (500-1,000 characters)



Your product images must be sized at 1000 x 1000 pixels.

How to embed videos on your Company Profile?

- To add an embedded video to a Product Profile or your Company Profile, click the **Video URL** in the **Product Profile** or **Company Profile**
- Then click "**Learn How**" to learn how/where to find the correct URL in YouTube or Vimeo. **Videos must to be hosted on either YouTube or Vimeo in order to be embedded on the Profile Page.



The screenshot shows a form titled "Video URL (embedded on the profile) [Learn how](#)". Below the title is a text input field with the placeholder "Enter Values (add as many as you like)" and "Type here". A blue arrow points from a callout box to the "Learn how" link. The callout box contains the text: "Provide embeddable links to your YouTube or Vimeo videos to showcase your company, profile, or products. Click on 'Learn How' for detailed instructions." At the bottom of the form is an "Update" button.

YouTube

Embed Video

```
<iframe width="560" height="315"
src="https://www.youtube.com/embed/bw
1LQEk1I00" frameborder="0"
allow="accelerometer; autoplay;
encrypted-media; gyroscope; picture-
in-picture" allowfullscreen></iframe>
```

Vimeo

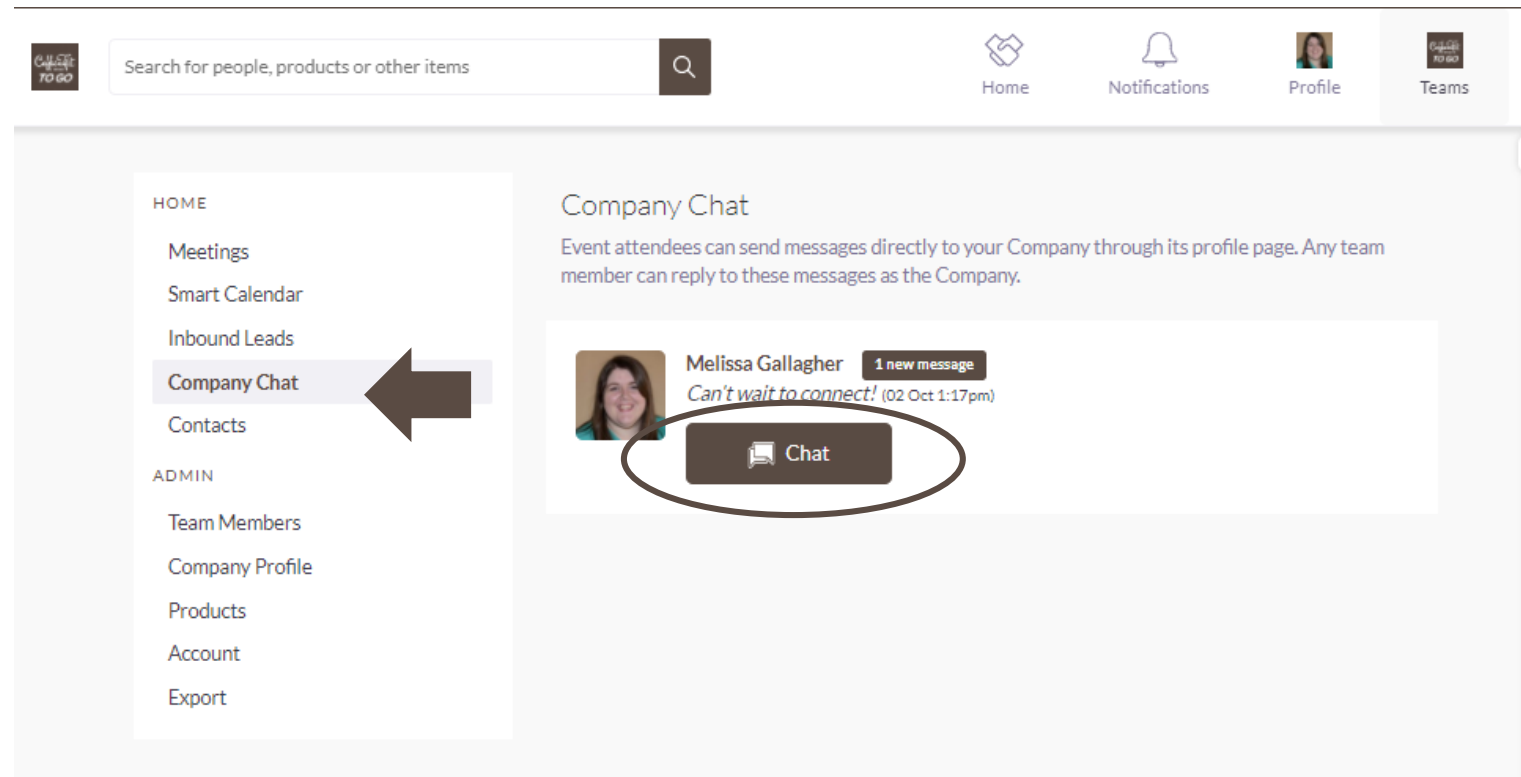
Embed

[+ Show options](#)

```
<iframe src="https://player.vimeo.com/video/154907512" width="640"
height="360" frameborder="0" allow="autoplay, fullscreen"
allowfullscreen></iframe>
<p><a href="https://vimeo.com/154907512">Bill Gates and the Quest
for Sustainable Energy</a> from <a
href="https://vimeo.com/atlanticvideo">The Atlantic</a> on <a
href="https://vimeo.com">Vimeo</a></p>
```

How to respond to Company Chats?

- Click "**Teams**" in the upper right-hand corner.
- Once in Teams, click "**Company Chat**" to view the messages received, and reply to individual messages.
- When you select a chat to respond to, a box will pop-up in the lower right hand window.



The screenshot displays the CareerToGo user interface. At the top right, there are navigation icons for Home, Notifications, Profile, and Teams. A search bar is located at the top center. On the left side, a navigation menu is visible with the following items: HOME (Meetings, Smart Calendar, Inbound Leads, Company Chat, Contacts), ADMIN (Team Members, Company Profile, Products, Account, Export). A large black arrow points to the 'Company Chat' item in the menu. On the right side, the 'Company Chat' section is active, showing a notification for Melissa Gallagher with the message 'Can't wait to connect!' (02 Oct 1:17pm) and a '1 new message' badge. A 'Chat' button with a speech bubble icon is circled in black, indicating the next step in the process.

How to view Inbound Leads?

- Click **"Teams"** in the upper right-hand corner.
- Then click **"Inbound Leads"** to see anyone who has viewed your Products, Company or Representatives' profiles.
- Filter by **"Lead Status"** (interested, connected, meeting, viewed) and/or by **"Team Member."**

The screenshot displays the 'Coffee Fest to Go' Teams interface. At the top right, there are navigation icons for Home, Notifications, Profile, and Teams. A search bar is located at the top center. On the left side, a sidebar menu lists various options under 'HOME' and 'ADMIN'. The 'Inbound Leads' option is highlighted, with a large black arrow pointing to it. Below the sidebar, the 'Inbound Leads' section is visible, featuring a description and two dropdown filters: 'Lead Status' and 'Team Members'. The 'Lead Status' dropdown is circled in black. Below the filters, a lead profile for Melissa Gallagher is shown, including her name, title, and two buttons: 'Show Interest' and 'Request a meeting'.

COFFEE FEST TO GO

Search for people, products or other items

Home Notifications Profile Teams

HOME

- Meetings
- Smart Calendar
- Inbound Leads**
- Company Chat
- Contacts

ADMIN

- Team Members
- Company Profile
- Products
- Account
- Export

SHARE YOUR CALENDAR

Make it easy for your network to meet with you at Coffee Fest to Go. Start sharing your team's calendar link!

COFFEE FEST TO GO

Inbound Leads

The Inbound Leads section features profiles of people that have shown interest, connected or interacted with you, your team members and/or company profile. The section is dynamic, as the profiles will remain on the list until you take action on them by requesting a meeting, showing interest or skipping the profile.

Lead Status Team Members

Melissa Gallagher

Manager, Audience Matchmaking at Clarion Events

Show Interest Request a meeting