



Representatives/Staff

In this area you may assign roles to users within your Virtual Site related to Chat/Social Networking.

Please complete all applicable information below for the new member.

Member Search

Please select a method for how you wish to search for a user. Choosing Search by Email will allow you to input a member's email address. Choosing Search by Name will allow you to input a member's first name and/or last name. Choosing Select from dropdown list will show you a dropdown of all users in the environment, in alphabetical order by first name, for you to choose from. This last option may not be desirable if you have an extremely large membership list.

☒ Select from dropdown list

☐ Search by Email

☐ Search by Name

*Member Name and Email Address

Please choose a User to become a Member.

Please select...

*Localized Instance Affiliation

Please select which language version(s) of the Virtual Experience the selected user(s) will be a staff member in.

☐ English

*Member Type

Please select the type of Member you are creating.

Virtual Room Representatives

*Virtual Room

Please choose a Virtual Room.

Please select one...

Please choose an area of the Virtual Room.

Please select one...

Cancel

Submit

Booth Representatives Explained

How to staff your booth and communicate with attendees – on Conference day and beyond

CONFERENCES FOR
WOMEN



Booth Representatives Explained

Booth Reps FAQs

Do I need to assign booth reps? If you want to have the ability to chat with attendees, either via private 1:1 chat or public chat, then yes. If you do not wish to have chats in your booth, then no.

If I do choose to assign reps, what hours should our booth be staffed? The exhibit hall will be busiest between ~8-10AM and 3-5PM (when attendees are not in sessions). You are welcome to staff for as much or as little of the day as you like.

If I don't choose to assign reps, can I still encourage attendees to email us with inquiries, connect with us on social, etc.? Yes, so long as you have an Info Card element in your booth, and so long as the Info Card is Enabled, and you've created a message via an Info Card Description in the "When no Room Reps Are Assigned" space (under the "Extras" tab).

Can fully-registered attendees also be booth reps? Yes. In some cases, we recommend creating a separate, designated booth rep login for attendees with dual roles so that they can more easily toggle back and forth between their full Conference experience and their booth rep duties (please ask the CFW team how).

Will my chat history be available post-Conference? Yes, so long as your reps have utilized the "Watch List" feature (explained within booth rep dashboard details in this training).



Booth Representatives Explained

This document will show you how to complete the following steps:

- Customize your Info Card – whether you plan to have 1:1 chats or not
- Add booth reps to your room
- Understand what reps will see on Conference day/chat stacking
- Change active booth rep on Conference day
- Log in on show days
- Understand key uses for the rep dashboard
- Set up and monitor a public chat
- **[SPONSORS ONLY]** Set up and use broadcast messages

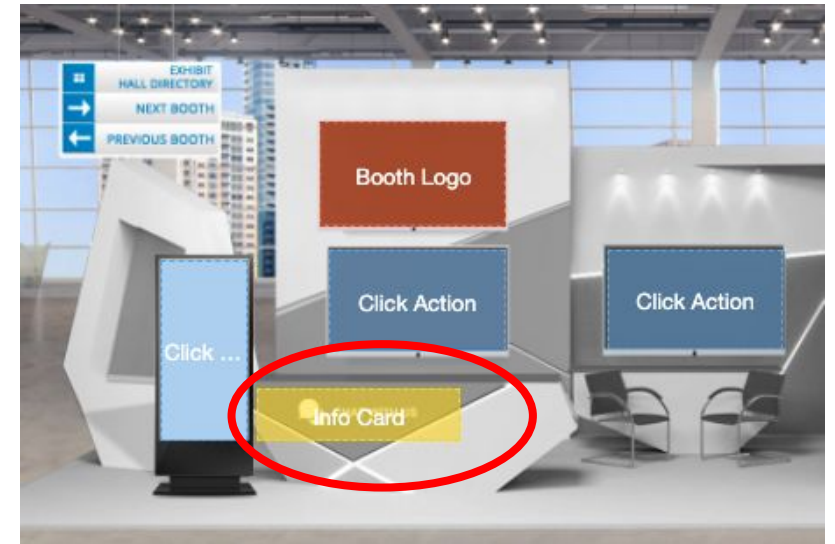


Booth Representatives Explained

How to customize your Info Card

First, make sure that you have included an Info Card element in your template

Next, if you intend to invite attendees to have 1:1 chats, make sure that there is also a Graphic Image element stacked on top of the Info Card element. The graphic should be a compelling, curiosity-stoking, guided call to action that compels attendees to click and engage with you.



An Info Card must be set up on the back end so that attendees see either the opportunity a chat with you (if you are planning on chats) or your message (if you are not planning on chats) on Conference day.



Booth Representatives Explained

How to customize your Info Card (cont'd)

- On the Virtual Builder screen, click “Extras” in the upper right-hand corner
- On the next screen, under “Info Card/Representatives,” make sure that “Enabled” is selected
- Then click the green “Customize” button just underneath

Manage Extras

Here you can manage the extras that can be applied to your Virtual Room.

Intro Video ?

None

☐ **Video Spokesperson?** ?

People Movie ?

Browse

Broadcast Message ?

Disabled

Info Card / Representatives ?

Enabled

Customize

☐ **Enable Doorbell** ?

☐ **Notify Offline Representatives** ?



Booth Representatives Explained

How to customize your Info Card (cont'd)

What you set up on the back end:

The form is titled 'Info Card / Representatives' and contains the following fields:

- Info Card Title:** A text input field.
- Info Card Description (when Room Reps are assigned):** A text area with a small edit icon.
- Info Card Description (when no Room Reps are assigned):** A text area with a small edit icon.
- About Us / Contact:** A section header with a help icon.
- Browse:** A green button.
- Website URL:** A text input field with a help icon.
- Twitter URL:** A text input field with a help icon.
- Facebook URL:** A text input field with a help icon.
- LinkedIn URL:** A text input field with a help icon.
- Close** and **OK** buttons at the bottom right.

Info Card Title: This is the first line that attendees will see when your chat box opens. You may choose to enter a simple greeting ("Hi!", "Chat with us!", "Have a question?"), your company name, etc.

Info Card Description (if staffing): A note that attendees will see at the top of your chat box

Info Card Description (if NOT staffing): A note that attendees will see if there are no reps in the booth (i.e., "Thank you for reaching out! We'd love to connect - please send an email/ connect with us on social/etc. instead")

Website URL: The place to enter your corporate website

Twitter, Facebook, and LinkedIn URLs: The place to enter your corporate social media information

What attendees see in your chat box on the front end:

The chat window is titled 'Live Chat About Career Goals & Pro... (4)' and contains the following content:

- A greeting: "Are you looking to advance within your organization, pivot industries, or build new skills? Tell us about your career goals and ask us what you've always wanted to know about pursuing an MBA or specialized masters degree."
- A note: "If our reps aren't available, we invite you to download a Graduate Business Programs brochure or sign up to receive updates from VSB."
- Social media icons: Twitter, Facebook, and LinkedIn.
- Reps: Two reps are listed: Anthony Pen and Claire Bruno. Each has a profile picture and a chat bubble icon.

Red arrows point from the back-end form to these elements in the chat window:

- From 'Info Card Title' to the chat title.
- From 'Info Card Description (if staffing)' to the main chat text.
- From 'Info Card Description (if NOT staffing)' to the note about downloading a brochure.
- From 'Website URL' to the social media icons.
- From 'Twitter, Facebook, and LinkedIn URLs' to the social media icons.

(When booth reps are assigned, gray chat bubble icon indicates booth rep is logged off/unavailable; green chat bubble icon indicates that booth rep is logged in/available)



Booth Representatives Explained

How to customize your Info Card (cont'd)

On the “Extras” tab, you also have “Enable Doorbell” and “Notify Offline Representatives” options:

- Enable Doorbell sets a doorbell to chime every time an attendee enters your booth. *This is different from the ‘ding’ sound that booth reps who are logged in will hear when an attendee wants to chat.* Experience proves that this is an annoying feature, as reps do not know who has entered their booth/do not have a means for engaging them, so the Conferences team does not recommend selecting this option!
- Notify Offline Representatives sets an email to be sent out when an attendee enters the room to all booth reps who have logged off. Again, experience proves that this is an annoying, unactionable feature, and the Conferences team does not recommend selecting this option!

Intro Video ?
None ▼

☐ Video Spokesperson? ?

People Movie ?
Browse

Broadcast Message ?
Disabled ▼

Info Card / Representatives ?
Enabled ▼

Customize

☐ Enable Doorbell ?

☐ Notify Offline Representatives ?



Booth Representatives Explained

How to add booth reps to your room

- Click "OK" to close out the pop up screen and go back to the main "Extras" page
- Click "Save" in the upper right hand corner to save your work
- Next, while still on the "Extras" page, under "Representatives", click "Manage"

Info Card / Representatives ?

Enabled

Customize

☐ Enable Doorbell ?

☐ Notify Offline Representatives ?

Rep Dashboard

☒ Attendees

☒ Rep Chat

☒ Watch List

☒ Chat History

☒ Chat Queue

☒ Rep Checklist ?

Customize

☐ Add a Survey? ?

Representatives

Manage

Public Chats

Manage

Reminder: Be sure to click "Save" in the upper right corner EVERY TIME you make a change

Save



Booth Representatives Explained

How to add booth reps to your room (cont'd)

Representatives

0 representative

Name	Email	Registered	Action
No representatives			

Add Representative

Add Representative

Search Upload CSV Direct Input

Localization Affiliation
Select which language version(s) of the Virtual Experience the selected user(s) will be a representative in.

☐ English

Add representatives by inputting emails here, separate by comma.

Close Save

1. On the pop up screen, click the green "Add Representative" button
2. On the next pop up screen, select the "Direct Input" tab
3. For "Localization Affiliation", click the box next to "English", then enter your reps' email address(es), separating multiple email addresses with commas but no spaces
4. Click "Save"
5. On the screen that pops up, you'll see the new representatives that you just entered as well as the names of any team members who may have already been in the 6Connex system building your booth/who are already registered. A "no" next to their email address means that they have not yet set up their profile in the system; a "yes" means that they have.

We will send one email to your company's main point of contact containing a different URL and instructions for setting up your reps' profiles separately. This is sent a few days before Conference day.



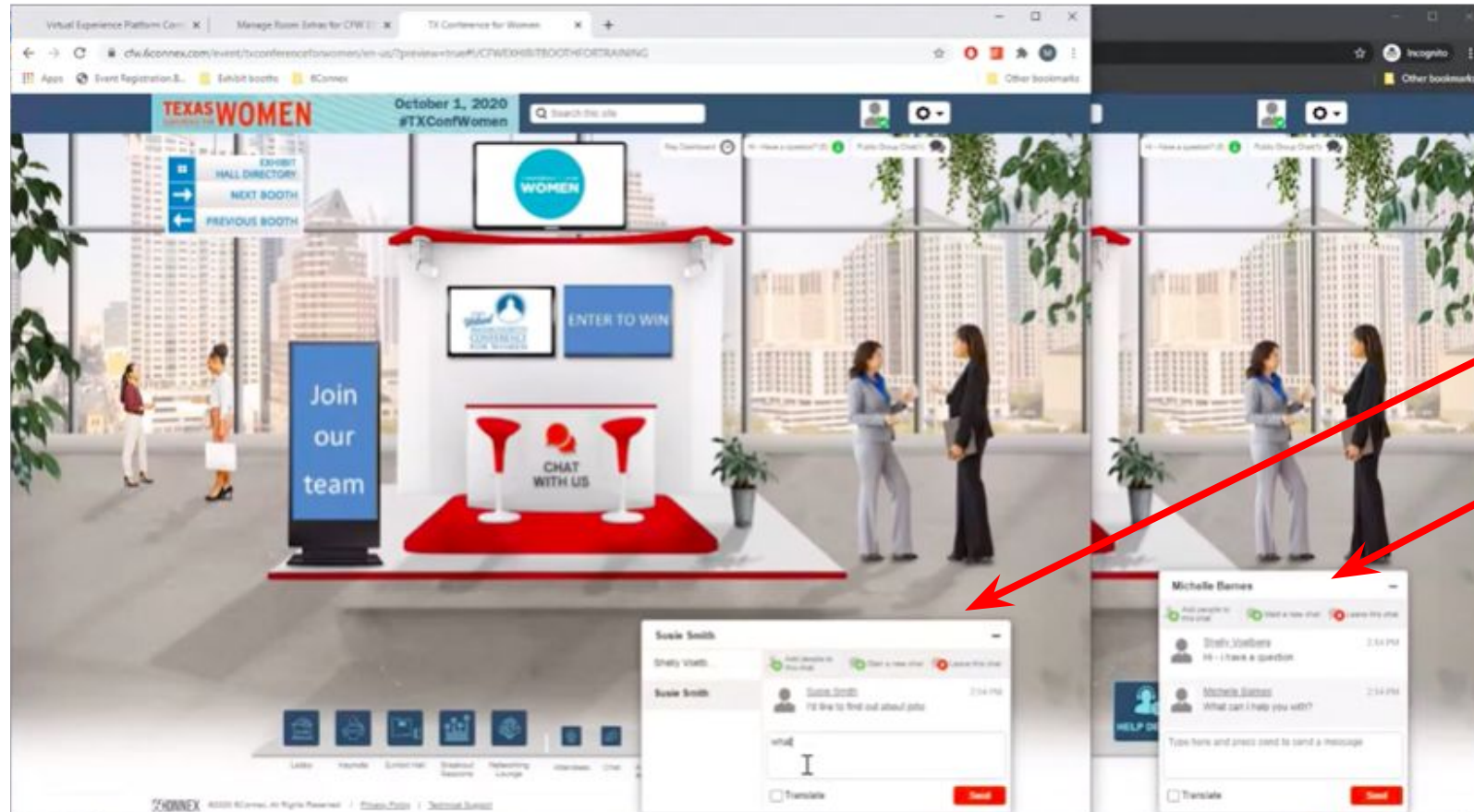
Booth Representatives Explained

What your reps will see on Conference day: “chat stacking”

Chat stacking is the default setting. This happens when more than one attendee clicks to chat with a booth rep but that rep is already chatting with another attendee. Please see “Booth Representatives Explained” training video, beginning at 06:00, to see how 1:1 ‘chat stacking’ happens and what it looks like for both booth reps and attendees.

The ‘ding’ sound:

Booth reps who are logged in will hear a ‘ding’ sound when an attendee wants to chat.



What your booth reps see on show day

What attendees see on show day



Booth Representatives Explained

What your reps can expect: “chat stacking” (cont’d)

There is a way to let attendees know that a rep is tied up and will be with them in a moment, so that attendees form a line instead. This is called the Chat Queue .

We do not recommend the Chat Queue for a few reasons, but are happy to have a conversation if you wish to discuss in more detail.



Booth Representatives Explained

How to change your active booth rep on Conference day



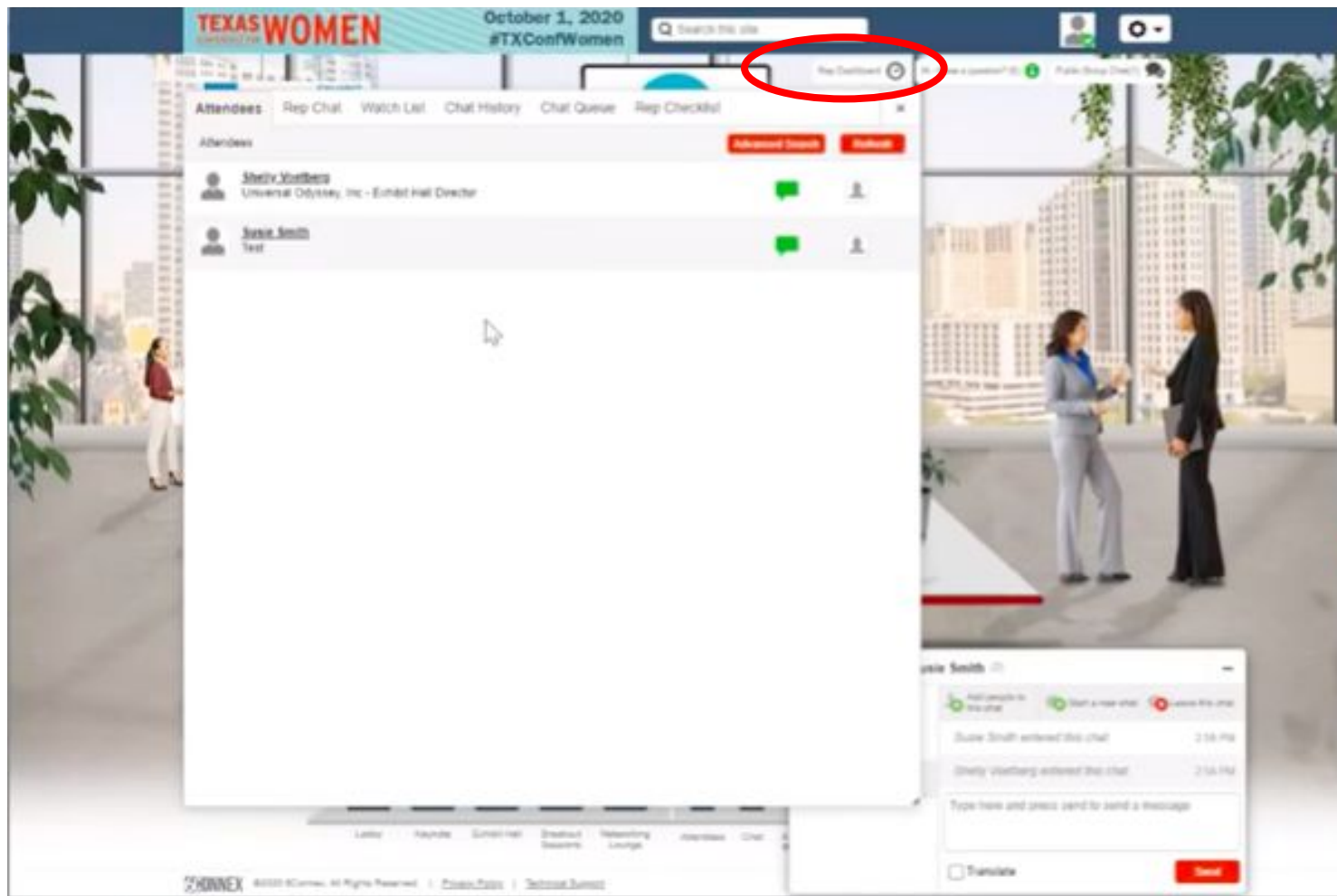
- If one of your reps is changing shifts on Conference day, click on the Settings wheel at top right to update your rep information
- Click on "Edit Registration Info" on the drop-down menu
- On the Profile screen, fill in a new name and title for your rep, then click "Submit"
- When you click back to your booth, you will see that the name and title of your rep have changed in the 1:1 chat box

This is an especially helpful option if you have a small number of booth rep slots and do not want the same people 'on duty' the entire day.



Booth Representatives Explained

How to use your Rep Dashboard



Your rep will log in on Conference day to enter your booth, and will have several options within the Rep Dashboard. Here are the two key functions:

- Use "Rep Chat" tab to talk to other reps who are in your booth (private messages between reps)
- Use "Watch List" tab to add an attendee to a watch list that will be saved after the Conference so you have a record of who you chatted with (we recommend that booth reps add all those they have chatted with to the Watch List)

After the Conference, the Conferences team can help to provide you with a transcript of chats, if needed.



Booth Representatives Explained

How to set up and monitor a public chat

Public chats can either be “always on”, or can be opened via a Click Action. There are 3 ways to set them up:

1. Use the “Extras” menu in Virtual Booth Builder

- Under “Public Chat”, click “Manage”
- Click the green “Add Public Chat” button
- Give it a title
- Pin a message that will appear at the top of your public chat to guide the conversation
- Click “Save”

The screenshot displays the Virtual Booth Builder interface with three overlapping windows:

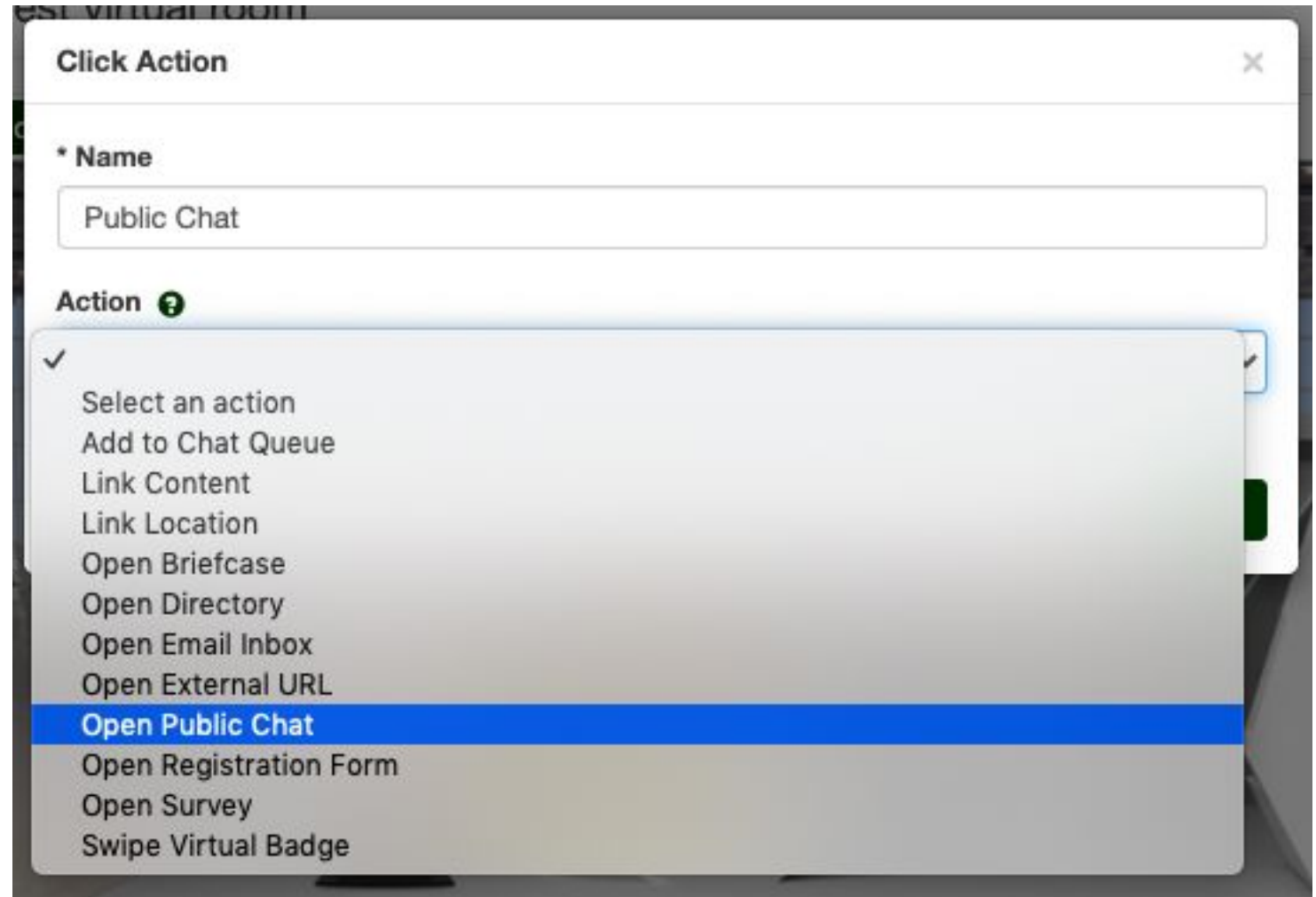
- Info Card / Representatives:** Shows settings for the booth's information card. The 'Enabled' checkbox is checked. There are buttons for 'Customize', 'Enable Doorbell', and 'Notify Offline Representatives'. The 'Rep Dashboard' section has checkboxes for 'Attendees', 'Rep Chat', 'Watch List', 'Chat History', 'Chat Queue', and 'Rep Checklist', all of which are checked. There is a 'Customize' button and an 'Add a Survey?' checkbox. The 'Representatives' section has a 'Manage' button. The 'Public Chats' section has a 'Manage' button.
- Add Public Chat:** A dialog box for creating a new public chat. It has a 'Title' field with the text 'Welcome to our public chat!'. Below it is a 'Pinned Message' section with a rich text editor containing the text 'We look forward to great exchange of ideas today!'. At the bottom, there is an 'Auto Pop Up' checkbox and a 'Position' dropdown menu set to 'Left'. There are 'Close' and 'Save' buttons at the bottom right.
- Public Chats:** A table listing existing public chats. It has columns for 'Title', 'Auto Pop Up', and 'Action'. The first row shows a chat titled 'Welcome to our public chat!' with 'Auto Pop Up' set to 'No'. The 'Action' column has links for 'Edit' and 'Delete'. There is an 'Add Public Chat' button at the top right and a 'Close' button at the bottom right.



Booth Representatives Explained

How to set up and monitor a public chat (cont'd)

2. Use the “Manage Template”/”Edit Template” options within Virtual Booth Builder to add a Click Action to a hot spot
 - Click “Save” after editing your template
 - Then, under Manage Room Elements, click on the Click Action that you wish to be your public chat
 - Name it
 - Then select “Open Public Chat” from the drop-down menu
 - Click “Save”



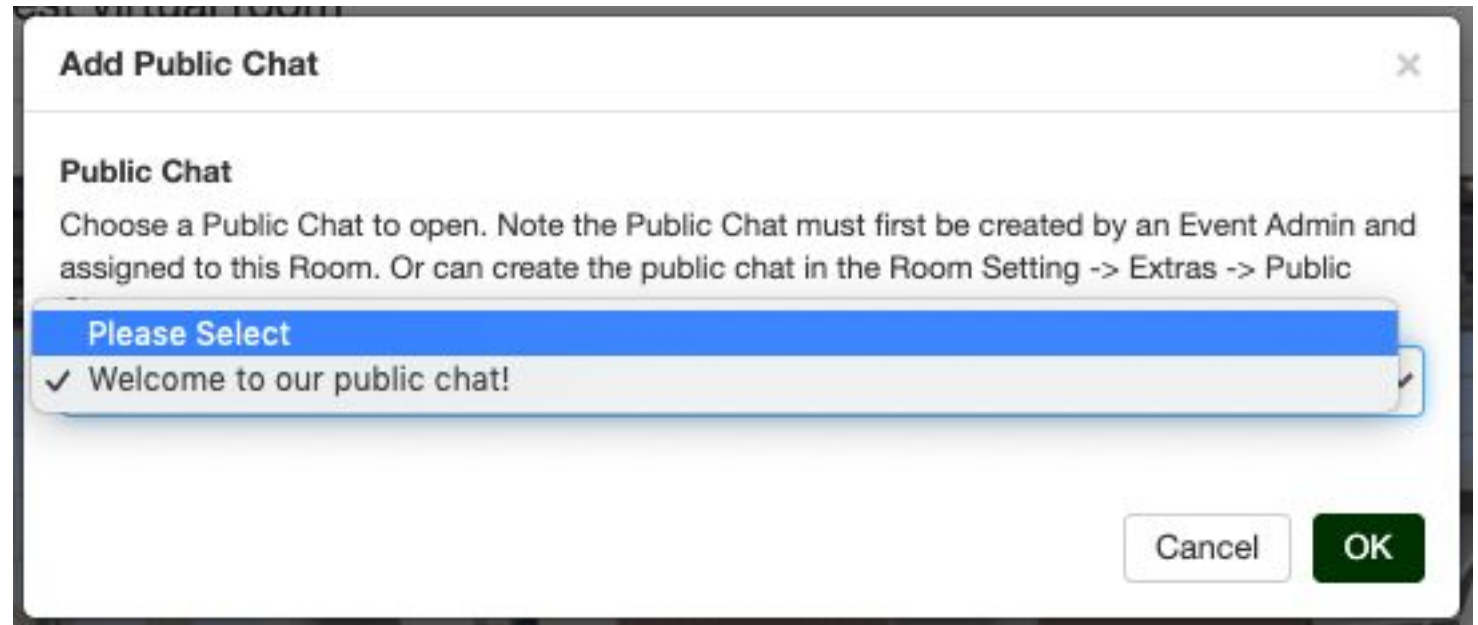


Booth Representatives Explained

How to set up and monitor a public chat (cont'd)

3. Use the "Manage Template"/"Edit Template" options within Virtual Booth Builder to add a Static Public Chat
[Please note: Static Public Chat is only an option if you have gone through the steps of using the "Extras" menu in Virtual Booth Builder]
 - Click "Save" after editing your template
 - Then, under Manage Room Elements, click on the Static Public Chat area that you just created
 - Use the drop-down menu to select your Public Chat
 - Click "Save"

Important to remember: A Static iFrame will always be open in your booth, so be sure that you set it up A) with the Safe Zone, B) large enough to be legible, and C) so that it is not covering any other elements!





Booth Representatives Explained

How to set up and monitor a public chat (cont'd)

Things to remember:

- No matter how you set up a public chat, there will always be a small box in the upper right of your booth screen to let attendees know that the option is available
- It is up to each exhibitor to take responsibility for monitoring your public chat, including removing any inappropriate comments. The Conferences for Women does not provide monitoring services.





Booth Representatives Explained

Set up and use broadcast messages **[for sponsors only]**

Please note: This option is for Champions and Sponsors only.

A Broadcast Message enables an exhibitor to make a pop-up announcement to all attendees who are in their booth at a given time – either right away, or at a set time. Broadcast Messages are only open for a set amount of time, and are a great way to raise awareness around things happening in other areas of the Conference (i.e., “Join our CEO as she welcomes [breakout session speaker] to the stage at 12:30!”) or things happening right there in your booth (i.e., “Ready for a quick and delicious afternoon treat? Check back in with us at 2:30PM for the perfect 5-minute recipe!”).

Here is how to set up a Broadcast Message:

1. Use the “Extras” menu in the top right
2. Select “Broadcast Message”
3. Select “Enabled” then click “Save”

Here is how booth reps can create messages on Conference day:

1. Click on the Settings wheel at top right
2. Click on “Broadcast Message” on the drop-down menu
3. Add your message text
4. Select to send your message now or “Schedule” to send at a specific time (be sure to select the appropriate time zone!)
5. Choose how long you'd like your message to display with “Message Duration”
6. Decide which Click Action you'd like, if any
7. Click either “Send” or “Schedule Broadcast” (depending on when you opted to send your message)



Contact Information

Sponsors:

General booth building questions: kgray@conferenceforwomen.org

Booth preview: istamour@conferenceforwomen.org

Exhibitors:

Email the specific Conference exhibit team with booth questions and for previews

Texas: exhibitors@txconferenceforwomen.org

Pennsylvania: exhibitors@paconferenceforwomen.org

Massachusetts: exhibitors@maconferenceforwomen.org