Virtual Event Management Tutorial

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Helping you prepare for the event

Questions: 770-980-0088 or events@careerereco.com
IMPORTANT:
Chat is available on multiple browsers and mobile devices.

Video chat and event-related broadcasts are **only** available from a desktop or laptop using **Google Chrome** or **Firefox**.
Note: Based on your organization’s set up, some Users may not have access to the Admin section and functionality shown in this tutorial.
Create your Organization Profile, since it is visible to Candidates immediately.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Email Address</th>
<th>Active</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer</td>
<td>Jane</td>
<td><a href="mailto:email@careereco.com">email@careereco.com</a></td>
<td>Yes</td>
<td><img src="#" alt="Reset PW" /> <img src="#" alt="Disable" /> <img src="#" alt="Edit" /></td>
</tr>
<tr>
<td>Jones</td>
<td>Elizabeth</td>
<td><a href="mailto:sample@careereco.com">sample@careereco.com</a></td>
<td>No</td>
<td><img src="#" alt="Reset PW" /> <img src="#" alt="Disable" /> <img src="#" alt="Edit" /></td>
</tr>
<tr>
<td>Recruiter</td>
<td>Tom</td>
<td><a href="mailto:example@careereco.com">example@careereco.com</a></td>
<td>Yes</td>
<td><img src="#" alt="Reset PW" /> <img src="#" alt="Disable" /> <img src="#" alt="Edit" /></td>
</tr>
<tr>
<td>Smith</td>
<td>Bob</td>
<td><a href="mailto:employer@careereco.com">employer@careereco.com</a></td>
<td>Yes</td>
<td><img src="#" alt="Reset PW" /> <img src="#" alt="Disable" /> <img src="#" alt="Edit" /></td>
</tr>
</tbody>
</table>
You may create event-specific profiles with unique content; otherwise, make all updates in the Default Profile noted above.

* Your Default Profile will be automatically displayed in each event unless you create an event-specific profile.

Click “Edit” to set up your Default Organization Profile.
Click on each tab, then click the “pencil” icon to update details in that section.

Upload one or more Custom images here

Dimensions of Custom Image section:
Width: 939 pixels & Height: 175 pixels

* All Information entered in Contact tab will be made public for candidates to see.
Long Organization names should be abbreviated to better fit in the name tab shown in the chat room.

To add video, images, or PDFs, you must use HTML.

Need Assistance? Email events@careereco.com

Add your description and modify the appearance using the edit tools above.

Be sure to click “Update”. You may edit profile later.
Add Users who will be in your chat sessions. They will receive an email with login details.

You may reset passwords, disable/enable users, and edit User details or permissions.

Upload files (Word, PowerPoint, PDF, pictures) that will be available to candidates in your chat room.
Click “Manage Event” to edit important event-specific details.

Take note of any event-specific alerts.
The tabs below are accessed from the “Manage Event” button (on prior screen)

Update details viewable to candidates that are displayed on the event site

**Note:** All changes are saved automatically as you make them.

**Primary Phone Number**

770-777-7777
Add your organization’s chat hours

You may select information used in prior events

Private Room is for internal discussions and candidates are unable to enter.

Your welcome message is the first message visitors see when they enter your room.

Choose the start and end times of your organization’s chat sessions.

Alert: Pay attention to the Time Zone of the event

Be sure to “Save”. You may edit later.
Participants selected below will receive a reminder 15 minutes before each session starts and other event related communications.

Note: You may need to add users by clicking Admin in the menu above before setting up fair participants.

- Elizabeth Jones
- Bob Smith
- Jane Employer
- Tom Recruiter

Checkmark Users participating in this specific event.

* See note above.
Employers: “Job Postings” will display the positions you will be hiring for in the fair.
Check the box below to restrict job postings only to candidates in the fair(s) you’re registered for. Otherwise, jobs are viewable to all candidates in the CareerEco system.

Job postings are displayed for 60 days and archived for later use.

Click “New Position” in the “Job Postings” section, then include details and save.
Edit your personal profile
* Your contact information listed here is not shared with candidates.

Your Full Name & Title will be displayed in the Chat Room by default. To change your User Name, enter the preferred name in the field below.

Upload your photo for display next to your User name in the Chat room. The file size required is exactly 400 x 400 pixels. Email us for assistance.

Be sure to “Save Details”. You may edit profile later.
Click on “Select Event” to view registered candidates for upcoming and most recent events.

Click “Show All Events” to view candidates from other prior events.

To view Registered Candidates’ profiles and resumes you MUST Select an event to begin your search.
To view Registered Candidates’ profiles and resumes you MUST Select an event to begin your search.

Registered candidates will appear once an event has been selected.
Use filters to find candidates that match your criteria.

* Use the “Clear” button to clear the search criteria.
A blue checkmark next to a Candidate name indicates they have expressed interest in your organization and will appear in “Expressed Interest” tab.

Click “Star” to “like” a candidate (they will appear in the “Liked Candidates” tab above).

Click “CV” icon to view resume & other career documents.

Yellow “chat bubble” indicates candidates that will appear in the “Chat Favorites” tab above.

* Candidates will not be notified if they are Liked or Favorited.
Add and Save notes which will show on the candidate record and in the reports.

Admin Users have access to notes made by all team members. Non-Admin Users only see their own notes.

Click the “pencil” icon, to add notes to candidate record.
Export Candidate spreadsheets:
Use filters to identify candidates based on selected criteria, then click the "Candidate Reports" button and click "Candidate Report By Selected Filters" to compile and export spreadsheet.

**Note:** Check boxes do not apply when generating this spreadsheet. All candidates that appear in your search results when using the filters will be included in the spreadsheet when you run the report.
Export Group of Resumes:
Checkmark each candidate to include in resume book, then click the “Candidate Reports” button and click “Resume Book By Selected Candidates” to compile and export resumes.

Note: Check the box to select “All” candidates in the list.
### Candidate Spreadsheets:
You may download individual resumes, or your system may allow a batch import of resumes.

**IMPORTANT:** The resume links will *only* be active for 60 minutes (for security reasons). Re-run reports to reactivate the links.

**ALERT:** If emailing a group of candidates, add the email addresses in the “BCC” section to protect their privacy.
The “Candidate Report” allows you to export a spreadsheet of all candidates registered for each event. Reports will continually update as candidates register.

The “Chat Room Transcript Report” provides details of all typed interactions, both public and private chats. **Note:** It may take a few minutes to generate this report.

The “Chat Room Participant Report” provides details in a spreadsheet of only those candidates who entered your chat room(s) in the event.
Candidates are sent notifications about unread messages twice daily. Please send messages prior to the event day to ensure delivery.

“Compose Message” to send a message to candidates prior to event.

Click “Messages” in menu to proactively invite candidates to your chat sessions (highly recommended).
If you would like to edit your message by adding images or other multi-media content, you may insert HTML code.

**Need Assistance?** Email events@careereco.com

Check “Allow Replies” to allow candidates to respond to your message.

Select the event to send messages to candidates in that event.

You may “Insert Merge Fields” to personalize your message. (i.e. inserting first name)
### Use filters to find candidates who meet your criteria.

- **Select Major(s)**
- **Select Degree(s)**
- **Select School(s)**
- **Select State(s)**
- **Select Candidate Type(s)**

### Adding Candidates to your Message:
Click the “Add” button by each candidate record or “Add all users” in your filtered list. Once the candidates are added, they will disappear from this screen.
### New Message

**Details** | **Add Users** | **Review and Send**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>User Name</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aiden</td>
<td>Candidate</td>
<td><a href="mailto:gocareereco+aiden@gmail.com">gocareereco+aiden@gmail.com</a></td>
<td>Remove</td>
</tr>
<tr>
<td>Alex</td>
<td>Candidate</td>
<td><a href="mailto:gocareereco+alex@gmail.com">gocareereco+alex@gmail.com</a></td>
<td>Remove</td>
</tr>
<tr>
<td>Kristine</td>
<td>Candidate</td>
<td><a href="mailto:gocareereco+kristine@gmail.com">gocareereco+kristine@gmail.com</a></td>
<td>Remove</td>
</tr>
<tr>
<td>KT</td>
<td>Candidate</td>
<td><a href="mailto:gocareereco+KT@gmail.com">gocareereco+KT@gmail.com</a></td>
<td>Remove</td>
</tr>
</tbody>
</table>

**Review Recipients and Send Your Message**

**Deliver message to selected candidates.**

* You may “Remove” candidates from the list if necessary.
Since message notifications are only sent to recipients twice daily (11am & 11pm Eastern Time), it is important to send your message prior to these times to ensure delivery.

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Message</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alden Candidate</td>
<td>Sample Message</td>
<td>Jul 13 04:22 pm</td>
</tr>
<tr>
<td>Jane Candidate</td>
<td>Sample Message</td>
<td>Jul 11 11:47 am</td>
</tr>
<tr>
<td>Kristine Candidate</td>
<td>Sample Message</td>
<td>Jul 9 06:49 pm</td>
</tr>
</tbody>
</table>

Unread messages are shown in blue font. To review and/or reply, click on the message subject line.
QUESTIONS:

770.980.0088
Events@CareerEco.com

Thank you for taking the time to review the tutorial!