



Agency How to Guide

Welcome to TerraTal – The Global Talent Exchange!!! We would like to thank you for agreeing to become a registered Agency and look forward to working with you as you grow your Professional Network. The purpose of this document is to provide guidance on how to navigate getting setup and using the basic functionality within The Global Talent Exchange.

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i. How to Register as an Agency

- a. You should have received a welcome email from TerraTal containing a link. You will click on that link and it will immediately redirect you to the Agency registration page where it will require you to change your password and accept the website user policy agreement. Once that is completed you are now registered as an Agency and can begin recruiting Agencies and Referral Sources along with referring Employers and Professionals into The Global Talent Exchange.

ii. How to Log into your Dashboard?

- a. To log back in as an Agency you can click on either the Professional Login or Employer Login buttons on the website's home page and enter your username and password. The system will know where to direct you by these credentials.

iii. How to create/register Agencies and or Referral Sources under your Network?

- a. You will click on the blue button labeled "Create New User" which will direct you to the registration page. You will need to provide the following information to complete the process:
 - i. You will need to designate what type of user you are registering. You will need to provide their User Name (we strongly recommend their email address),
 - ii. Email address
 - iii. Initial password (we recommend you use a consistent one across all new users)
 - iv. First name



- v. Last name
- vi. Phone number

***Last you will need to accept the User Policy Agreement on their behalf and click the “Create New Account”. This will send the intended recipient an automated email containing a link for them to click on that will automatically redirect them to change their password and re-accept the User Policy Agreement. Once they do this they are then registered in our system.

iv. How to track production of your Network

- a. You will be able to track all of your direct network from your Agency Dashboard page. There is an Agency / Referral Source tracking table that displays each registered Agency & Referral Source directly tied to your network along with all of their specific production details. Each column in this table is sortable for ease of use.

v. How to manage the active status of your Network

- a. The last column is an user management function. You can control access to the site by toggling between active and inactive. If you uncover an agency or referral source acting inappropriately you can freeze their access to prevent them from entering the site. All of their information will remain intact, they will no longer be able to access their specific dashboards.

vi. How to drill down into your Network’s detailed performance information.

- a. You can drill down into a specific Agency’s or Referral Source’s detailed information by clicking on their name in the Agency / Referral Source tracking table. This will take you into their site and you can see their network and applicable production detail. You will be able to see all the way down to the last Referral Source in the hierarchy of your Network. Your ability to drill down ability stops there. You will not be able to see any Employer or Professional specific detail.

vii. How to Refer a Professional

- a. Once registered and logged in the site you can click on the Professionals Dashboard tab in the menu bar. Here is where you can refer new professionals and track whether they register and create a professional profile.
- b. There are two ways to get credit for referring a professional:
 - i. On your Professionals Dashboard in the Professional Invite section you will enter their first name, last name and email address in the applicable fields and click blue “Send Invitation” button. This will send an automated email to the Professional indicating that you have referred them into the site as you believe it would benefit them. In the email there is a link and if they click on the link and register they become part of your Professional Network by that email address.



- ii. On your Agency Dashboard page you have been assigned a Dedicated URL that is outlined on this page under your name and email. This is specific to your agency and allows us to tie anyone who uses it to register back to your Professional Network. You can use that link to generate Professional Profiles and anyone who registers using it will become part of your Professional Network by the associated email address.
- c. You are able to track all of your Professional referrals through the system in the Referral Tracker section of the Professionals Dashboard just under the Professional Invite section. It will also tell you how many times their profile has been purchased. Please keep in mind that you will only see those that register through the Dedicated URL after they register.

viii. How to refer an Employer

- a. To refer an employer, click on the Employers Dashboard. Once the site has redirected you please enter the Employer Name (Company Name), First Name, Last Name, and email address of the person who you are referring in the applicable fields. You will then identify their role either as an Organizational Administrator or a Hiring Manager/Recruiter. You can only choose one.
 - i. An Administrator will get access to a company dashboard whereby they can manage users under their company domain.
 - ii. A Hiring Manager/Recruiter will have access to a personalized dashboard without the ability to add users under their company.
- b. Once you have identified which role you will click the blue button labeled “Send Invitation” which will generate an automated email based on their role containing a link that they will click on to complete their registration. Once registered as they drive Professional Profiles into The Global Talent Exchange these will become part of your Professional Network.
- c. You will be able to track whether the Employers, Hiring Managers, or Professionals have registered and the # of Referrals they have registered on the Global Talent Exchange.

This concludes our How to Guide for Agencies. If you should have any questions please email us at ReferralSource@terratal.com. Again, we are excited that you are part of The Global Talent Exchange!!!!

Sincerely,

The TerraTal Executive Team