

Balance to Buy™ Pro Tip – Chat and Schedule Training

Objective: I need to be able to quickly ask a question and schedule training.

Solution: The new Chat and Schedule Training buttons!

When you are working in the Balance to Buy System, you now have the option of asking a question or scheduling training thru two new buttons at the top right hand corner of each page.



To Chat:

Step 1: Click on the Chat Button. A blue box will appear

Step 2: Fill out your name and email.

Step 3: Click the drop down box to select the department that will best address your question or concern.

Options: BTB Administration

BTB Trainer / Consulting

BTB – Vendor Training

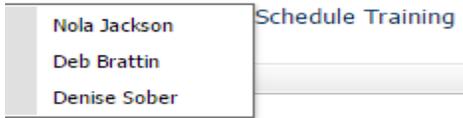
Tech Support

Step 4: Type your question and click Initiate Chat. If you would rather send the question to us in an email, just click the email symbol at the bottom of the box.

BIG - BUYERS INTELLIGENCE GROUP

P.O. Box 480 • Napa, CA 94559 • Office 707-257-1456 • Fax 866-415-6782
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To Schedule Training: Click the Schedule Training Button and a Box with all of the trainers will appear



Step 1: Select your trainer and her appointment calendar will appear



Select Date and Time

February 2017 < > Week Month Time Zone (-06:00) Central Time

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-------------------|-------------------|-------------------|-------------------|-------------------|-----|
| 29 | 30 | 31 | 1 4 Available | 2 3 Available | 3 4 Available | 4 |
| 5 | 6 3 Available | 7 4 Available | 8 4 Available | 9 1 Available | 10 | 11 |
| 12 | 13 | 14 | 15 4 Available | 16 3 Available | 17 4 Available | 18 |
| 19 | 20 3 Available | 21 4 Available | 22 4 Available | 23 3 Available | 24 4 Available | 25 |
| 26 | 27 3 Available | 28 4 Available | 1 4 Available | 2 3 Available | 3 4 Available | 4 |
| 5 | 6 3 Available | 7 4 Available | 8 4 Available | 9 3 Available | 10 4 Available | 11 |

powered by timetrade Continue

Step 2: Select the date and time you prefer and click continue.

Step 3: An information box will appear – complete with your information and select confirm.



Provide Information

First name * Last name *

Email *

Phone Number *

Company

Comments

Back Confirm

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A Confirmation box will appear.



Appointment Confirmed

| | | |
|---|--|---------------------------------|
| Monday, February 6, 2017 11:30 AM - 12:15 PM Central Time | Confirmation # 7727668 SCHEDULED | |
| Instructions Go To Meeting information to follow. | | |
| Appointment Type | Invitation to schedule a call | Add to Calendar |
| Call With | Deborah Brattin | |
| Your Information | Deborah Brattin Deborah@gmail.com 417-827-3904 | |

Your trainer will be automatically notified with the details of your appointment and will send you a Go To Meeting Confirmation Link. Make sure you add the appointment to your calendar!

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