



SPECIALIST SERVICES MEMBERS GUIDE – Directory Set up and maintenance

WELCOME TO THE MEMBERS SERVICE GUIDE.

This guide will tell you more about the services currently available to Specialist Service members, how they work, how you enter information and administer your site entry. This section deals with the Specialist Service Members Directory.

The Specialist Service Members have directory entries that are only searchable by the member groups, not by the general public. This allows entries to be focussed directly at the professional advisers; lawyers and financiers involved in Corporate Finance Transactions who are our members. Your articles and publications can be seen by all users of the site.

For Members and Finance Members, please see the relevant guides under help.

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INTRODUCTION AND DIRECTORY EXAMPLE

What sort of Information do I need to sign up?

When you first join the CF network, you will be asked to provide information which forms the basis of your directory entry. The information is of 2 types

- Text that appears on your directory i.e. services and corporate statement
- Information which does not appear on your directory entry but is used in searching for your entry or for administration purposes.

The following sections take you through the information required in detail.

If you proceed to sign up, but do not have full information, you can enter 'to be advised' on text fields and continue. You can go back and edit your entry later.

Who can see my directory entry and what region will it cover?

Your directory entry can be seen by all members who have logged in, but not by other visitors to the site. You subscribe for an entry in one or more regions. Our directory is designed to provide flexibility in choosing regions to best reflect your needs. The use of regions is described in much more detail below.

What will my directory entry look like?

This is an example of how your directory entry may appear.

How will members contact me?

The Directory entry will include your contact details including a link to your website, automatic email links to your corporate email address and to an email address for each of the primary contacts.

How do I set up my directory entry?

Your entry is created by completing online input forms. You access these forms by clicking on CF network tab, selecting join the network and specialist service member.

Can I change my entry latter?

YES! Most of the information you enter can be changed using a secure log in. This will enable you to keep your entry up to date. On signup you will set up two logins:

- An administrative login name and password - allows updating as well as viewing information
- A member name and password –allows viewing of information only.

Is there information I can't update?

Yes. This information can only be updated by contacting the CF connect support team. You cannot update the following:

- Administrator and Member username
- Company name
- Home Region
- Additional regions

Should I prepare the information first?

We recommend you prepare your information, such as the corporate statement, first in a program such as Microsoft Word. You can copy and paste the information once completed from Word to the signup form. You can use the Word spell check and give you a hard copy of your entry for future updating. You can also use the word count to check that the proposed wording is not too long as the length of your entry for some fields is restricted.

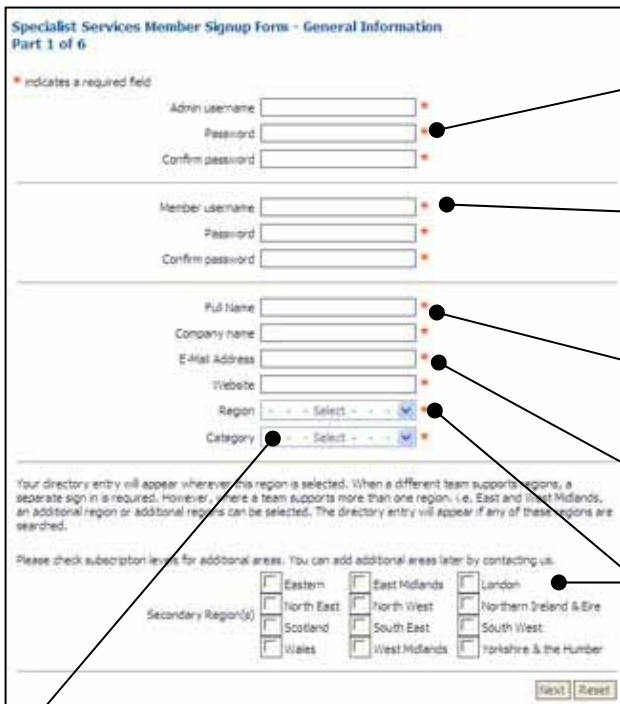
Can I go back and change information after pressing the Next button?

No. You will need to complete your entry and then use your login to make the required changes. It is important that when entering information, you do not try and change entries on previous pages by using the internet explorer back button. Your data already entered will be erased and you will have to start again, entry will have to be repeated and may even cause additional problems.

THE SIGN UP FORM

What information is required on page 1 of the signup form?

Page 1 covers the usernames, company name, full name of primary administrative contact, company general email, website, the region or regions for which you wish to be registered and the category of your business or company.



The administrator username allows amendment of details including passwords and your firm's entries on the site. It is recommended that this username and password be kept highly confidential and that the password be changed at regular intervals.

The member username is for all users within your organisation in the region subscribed to. It is best that this and the password is a name that members of your firm will find easy to remember. This username will allow members to log in to the members services but will not allow posting or updating of records. This allows access to the members' area of the site without risk of data being amended without authorisation.

The name of the principal contact, organisation name and contact details. This person will not appear on the directory but is the primary contact for CF connect.

You may wish this email address to be a general address as it will appear on your directory. Confirmation emails will be sent to this address.

Each sign up is for a single primary region. If a single team supports more than one region additional regions can be selected. See below for more information on regions and for suggestions for usernames of firms signing up for several regions.

Select either Business coaching, Consultant/sector specialist, Corporate recovery, Due diligence, Financial books, Financial databases & info, H.R. Advice, Magazine publications, Network coaching, Promotional goods, Professional bodies, Public relations, Recruitment agencies, Regional development, Researchers, Specialist software, Stockbrokers, Taxation, Training, Transaction insurance, Valuation specialists, Other.

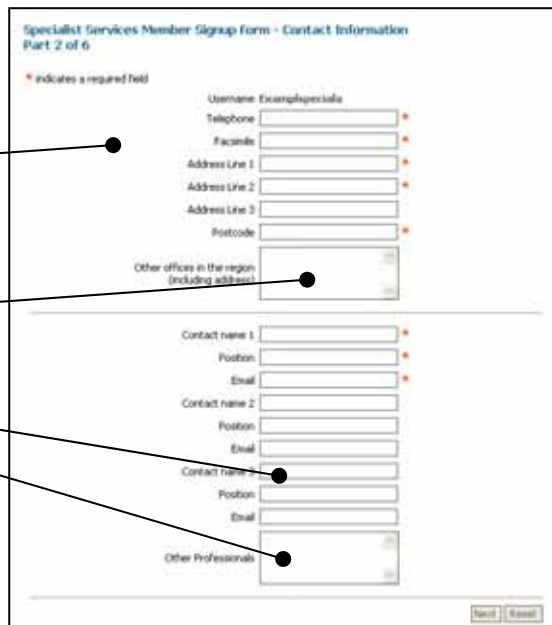
What information is required on page 2 of the signup form?

Page 2 covers the main contact details of the firm including 3 primary contacts.

Contact details of the main office

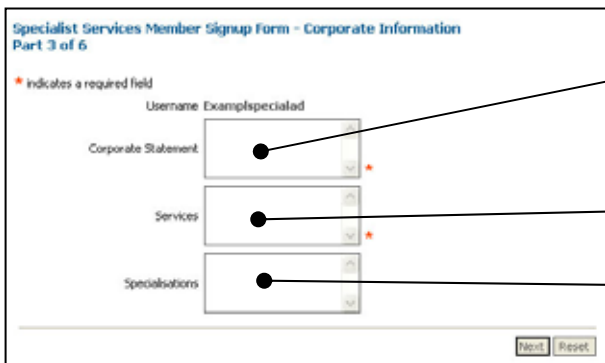
Where there is more than one office in a region i.e. Manchester, Liverpool in as text. This section is limited to 150 characters including spaces, approximately 25 words.

The directory entry has room for 3 contact names with position and email. If you do not want each member contactable by email, enter a central email such as location or speciality. Other contacts can be entered as text here. As section is limited to 150 characters including space, approximately 25 words.



What information is required on page 3 of the signup form?

Page 3 contains the corporate statement, services and specialisations.



The corporate statement is designed to be an overall statement of your position in the market, your aims and philosophy. This statement will appear as part of the search listing and needs to catch the attention of the Members. *The length of the statement is restricted to 520 characters including spaces which equates to approximately 75 words.*

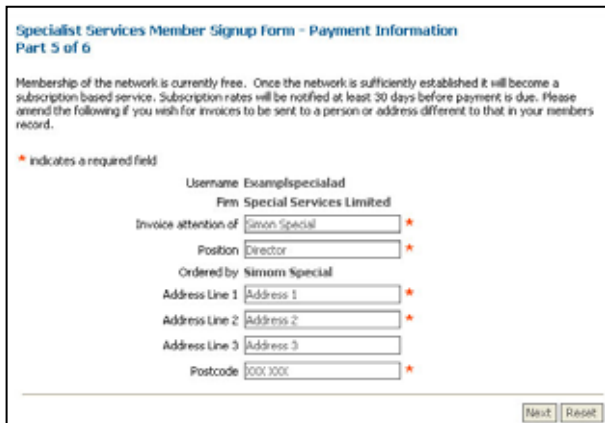
List the range of services provided. Entry is limited to 400 characters including spaces, approximately 55 words.

Specialist sectors give the opportunity for Specialist service members to highlight specific sectors in which they specialise. *Entry is limited to 150 characters including spaces, approximately 20 words.*

What information is required on page 4 of the signup form?

Page 4 is a confirmation page and there is no input. At this point your data is on the database. The page includes instructions on sending photographs and on the authorisation process.

What information is required on page 5 and 6 of the signup form?



Page 5 brings forward key contact details for invoicing. These can be overwritten should the invoice need to be addressed elsewhere. When the service becomes subscription based, subscription amounts and payment details will appear here also.

Page 6 is a final confirmation page and there is no input.

REGIONS

What are the CF connect regions?

- London
- South East (Oxfordshire, Berkshire, Hampshire, Surrey, Sussex, Kent)
- South West (Cornwall, Devon, Somerset, Dorset, Wiltshire, Gloucestershire)
- East (Norfolk, Suffolk, Cambridgeshire, Essex, Hertfordshire, Bedfordshire, Buckinghamshire)
- East Midlands (Northamptonshire, Leicestershire, Lincolnshire, Nottinghamshire, Derbyshire)
- West Midlands (Birmingham, Hereford, Worcester, Shropshire, Staffordshire, Warwickshire)
- North West (Cheshire, Greater Manchester, Lancashire, Merseyside)
- Northern (Cumbria, Durham, Northumberland, Cleveland, Tyne & Wear)
- Yorkshire & Humberside
- Wales
- Scotland
- Ireland & Eire

Why are regions important?

Subscription will be based upon membership of a firm in a single region. Selecting the right regional presence is important because:

- Searches of the specialist services directory, articles or publications where a region is selected, will only select members registered in that region.
- Access to the member’s area is only permitted for employees of the firm based in offices of the region selected.

What if we don’t have a single team working in a single region?

The following are suggestions as to how to deal with situations where members have operations other than a single team working in a single region.

- a) **One team operating across several regions i.e. a team covering the North West, Yorkshire, Wales and East/West Midlands based in Manchester**– As your main base would be Manchester; the North West will be the primary region. Tick the boxes for the additional regions to be covered. Your directory entry and articles will be found in a regional search of any of the selected regions. This is not available if you have a different team supporting that region.

The following example is for a NW team supporting several regions including part of Wales. The primary region is North West with the additional regions of North east, Yorkshire and Humber, Wales, East and West Midlands. You may find it useful to refer to the region covered in the corporate statement i.e. “Our North West office provides services to clients in the North West, Yorkshire and Wales.” You may also find it useful to add a regional description to the firm when there are several national entries.

<p>1.) Beer and Partners Ltd - (North) view directory entry view company website</p> <p>The largest provider of private investor (Business Angel) capital in the UK, over 600 investors with £350m available from 8 regional offices. Our Northern office supports those seeking funding throughout the North, North Wales, North Midlands and Ireland.</p> <p>London House, London Road South, Poynton, Cheshire, SK12 1YP. Tel: 01625 879777 Fax: 01625 879 666</p>	<p>Name adds regional illustration which is useful where several national entries.</p> <p>Corporate statement adds description of regions covered.</p>
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- b) **Different teams support different areas** – Separate sign ups are required in each area. It is not permitted for a single entry to provide marketing presence and services to more than one regional team. That is cheating.
- c) **2 Teams are based in and support a single CF Connect region** – A single entry should be subscribed for covering the CF connect region. This should provide contact details of each office and you should add

Beer and Partners Ltd - (S East/Thames)

Business angels network print this record view recent deals go back

Services	Primary Contacts												
Business angel capital, turnaround capital, public offers, company sales, start up funding, development capital, MBO, MBI.	Martin Atkinson - <i>Regional Director South East</i> , Chris Clegg - <i>Regional Director Thames Valley</i>												
Address	Other contact personnel												
17 Dornden Drive Langton Green Tunbridge Wells, Kent TN3 0AA Tel: 01892 863579 Fax: 01892 864038 Email: southeast@beerandpartners Website: www.beerandpartners.com	Major clients												
Other addresses	Corporate statement												
Thames Valley Office 18 College Avenue, Maidenhead, Berkshire, SL6 6AX Tel 01628 678100 Fax 01628 621381 thames@beerandpartners.com	The largest provider of private investor (Business Angel) capital in the UK, over 600 investors with £350m available from 8 regional offices. We have advisers available throughout the UK. We serve the south east from our offices in Tunbridge Wells and Maidenhead.												
Preferred transaction size	Specialisations												
<table border="0" style="width: 100%;"> <tr> <td>• £0-50k</td> <td>• £50-150k</td> <td>• £150-250k</td> </tr> <tr> <td>• £250-500k</td> <td>• £500k-1m</td> <td>• £1m-5m</td> </tr> <tr> <td>• £5-10m</td> <td>• £10-20m</td> <td>• £20-50m</td> </tr> <tr> <td>• £50m+</td> <td></td> <td></td> </tr> </table>	• £0-50k	• £50-150k	• £150-250k	• £250-500k	• £500k-1m	• £1m-5m	• £5-10m	• £10-20m	• £20-50m	• £50m+			Venture capital for smaller companies
• £0-50k	• £50-150k	• £150-250k											
• £250-500k	• £500k-1m	• £1m-5m											
• £5-10m	• £10-20m	• £20-50m											
• £50m+													

description to member entries. In this example the CF connect South East region is covered by an office in Kent and an office in the Thames Valley. The division of responsibilities can be explained in the corporate statement.

- d) **2 or more teams support an area in which there is no team** – An example would be where North Wales is supported by the North West office and South Wales by a South West office. Both the South West and North West offices will select Wales as an additional region. Use the corporate statement to

1.) Beer and Partners Ltd - (North) view directory entry view company website

The largest provider of private investor (Business Angel) capital in the UK, over 600 investors with £350m available from 8 regional offices. Our Northern office supports those seeking funding throughout the North, North Wales, North Midlands and Ireland.

London House, London Road South, Poynton, Cheshire, SK12 1YP. Tel: 01625 879777 Fax: 01625 879 666

4.) Beer and Partners Ltd - (South West) view directory entry view company website

The largest provider of private investor (Business Angel) capital in the UK, over 600 investors with £350m available from 8 regional offices. We have advisers available throughout the UK. Our South West office also services clients in South Wales.

Olands House, Milverton, Taunton, Somerset, TA4 1JP. Tel: 01823 400020 Fax: 01823 401222

describe the part of Wales covered as in this example. If a search is made and Wales is selected as a region, both the North and South West entries will appear.

- e) **Separate teams from one organisation provide differentiated services in a single region** – An example would be a bank providing multiple services using different teams i.e. finance up to £10m, finance above £10m and acquisition finance. In these circumstances, more than one entry per region will be the best way of providing a position.

If you are not sure as to the best representation of your business, please contact us.

If my firm has several entries, how do I set up usernames and passwords?

If you have entries in more than one region, different administrative and members user names are required. There are no restrictions on duplicate company names but you may find it useful to add a region in brackets to your firm's name. This helps differentiate entries where a Member searches without regional limitations.

UPDATING YOUR ENTRY

How do I update my entry?

- Your directory entry can be revised at anytime once approved
- Log in using an administrator password
- Select directory entry and update from the View/Update menu
- Select the relevant page, make changes and save.

Use the save changes to go back even if no changes have been made.

IF YOU INCUR PROBLEMS DURING SIGNING UP

What if I have problems during sign up?

If you encounter computer problems during completion of the form, try setting up the user on page 1 again. If you get a message saying the account is already set up but have not received a confirmation e-mail, email support@cfconnect.co.uk detailing the problem and we will attempt to resolve it.

THE APPROVAL PROCESS

Why does my entry need to be approved?

The approval process is to ensure that only approved Members are allowed to join the network. There are few limitations on who can join as a Special Services Member.

How long will approval take?

Approval should take no longer than 24 hours and we shall endeavour to approve entries much more quickly than this.

ADDING PHOTOS TO YOUR ENTRY

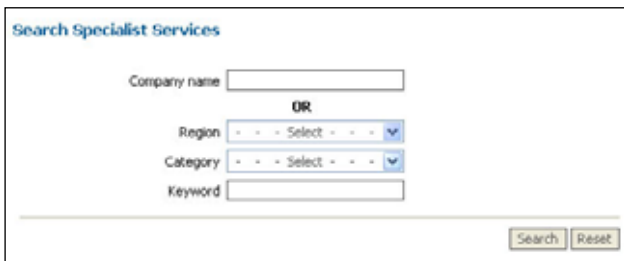
How many photographs can be added to the site?

Up to 3 photos may be added. They do not have to be the three primary contacts although we expect that in most cases they will be.

How do I add photos to our entry?

Photos should be emailed to subscriptions@cfconnect.co.uk as JPEG files. We will edit the files to make them suitable for inclusion on the website. The photo file names should be in the form `companyname_chritian_surnameN.jpeg` where N is the order the file appears 1 top, 2 middle, and 3 bottom. The Christian name and surname will be used as the caption. You can email us the photos as soon as you sign up so they can be on the site when your entry is approved.

HOW MEMBERS CAN SEARCH YOUR ENTRY



Once your account has been approved, visitors to the site will be able to search for your directory entry. One of the most powerful search features is the keyword search. The keyword search will cover the following fields:

- Corporate statement
- Services
- Specialist sectors
- Other offices and addresses



Should your directory entry meet the search criteria, the Members see a list which looks like this. They then have the opportunity to view and print each record. This demonstrates why the corporate statement is particularly important in attracting attention.

TIPS FOR SIGNING UP

- You can always make an abbreviated entry to set up the account and return later to update it
- Don't forget to send your photos
- We recommend you prepare the information required before signing up
- After sign up, email users with the Members username and password. Change the password at least every 3 months. Keep the administration password and username confidential and change the password at regular intervals or when a member of staff who knows the password moves from your firm.
- The entry is to attract professionals to seek your services. The wording should be focussed towards a professional audience. Pay attention to keywords in your site which reflect your firm's specialisation or differentiation. Review your site regularly to ensure it is up to date
- Send us your press releases, they may appear on our news, information or we can suggest how your entry on CFconnect can be enhanced
- Use articles, events and publications to strengthen your entry. These can be seen by all visitors to the site and not just by members.
- Let us know of any problems or suggested improvements.