

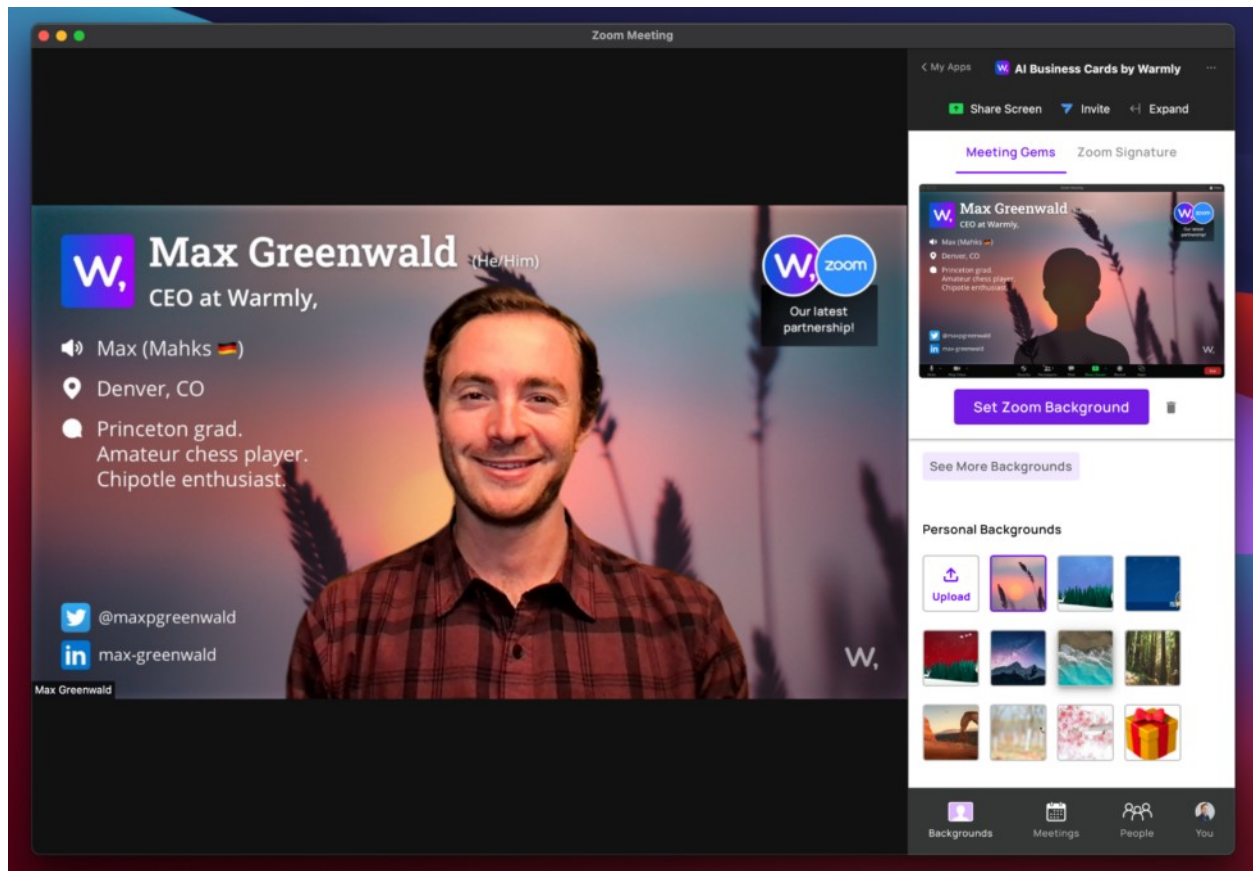
## Enablement Guide: Warmly Use At Your Company

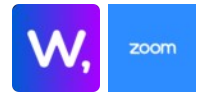
This brief guide covers:

1. Three steps to install Warmly (& troubleshooting)
2. Three ways to encourage Warmly use at your company (hint: we'll do it for you!)
3. Common security & privacy FAQs

If you'd prefer a 3 minute short video tutorial instead, please watch [here](#).

🗨️ Hi there IT team! If you're like most IT teams who greenlit Warmly, you realize how tough it is to look professional virtually. But you also recognize the power of how giving an on-screen business card to your coworkers will be a powerful unlock for your business and its brand:





## Three steps to install Warmly (& troubleshooting)

### Step 1: Install & test Warmly for yourself

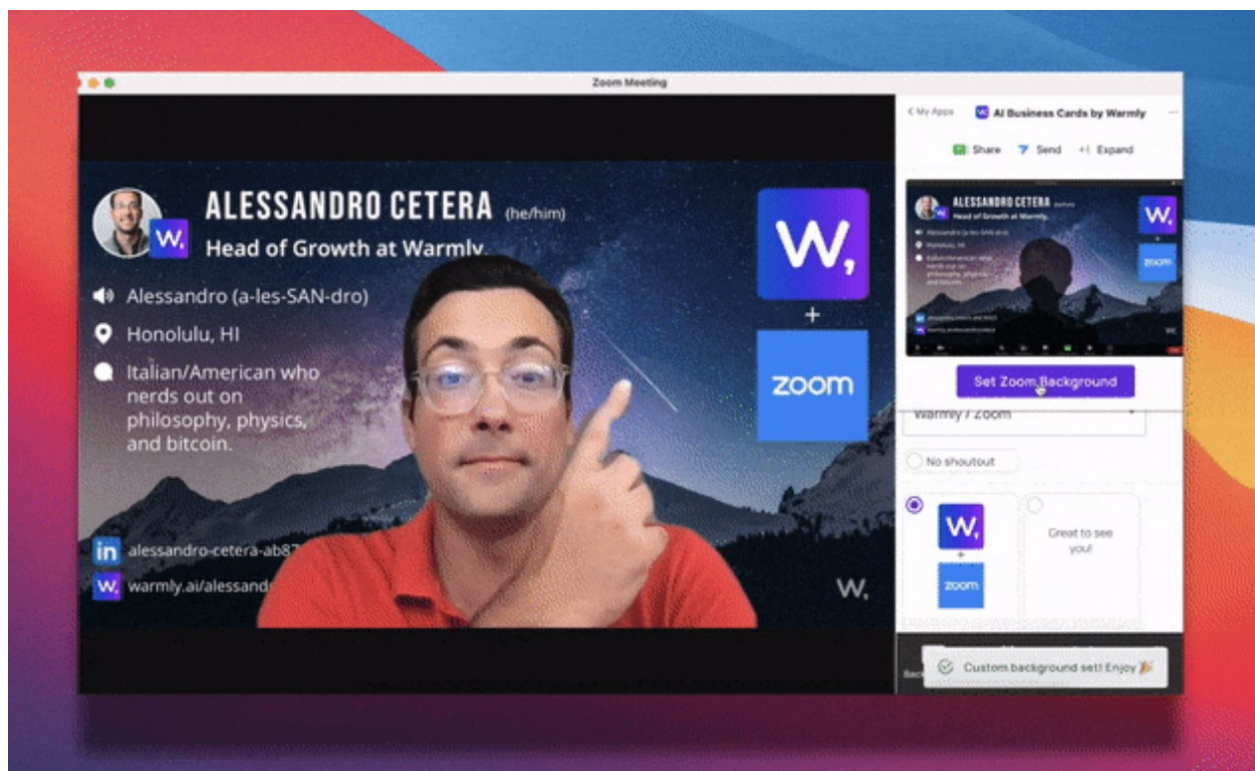
Head over to Warmly's [Zoom Apps Marketplace listing](#) and pre-approve Warmly for installation. Then install it for yourself to set a “hyper-basic” business card. If you'd like to see the full product in action, please follow prompts to connect your Google or Microsoft account.

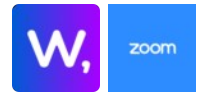
If you need to set up SSO to access, or cannot yet connect your corporate account, you can test out the full product using a dummy gmail/outlook account or using our demo account (Scroll to the Appendix for details).

*? Any issues? Scroll to the Appendix of this document for the common issues to troubleshoot*

### Step 2: Try adding your first virtual Business Card

Jump into a meeting by yourself and turn your camera on. Then open Warmly's Zoom App from the Apps button and try adding a background! If helpful, watch a [3 minute explainer video](#) on setting your first virtual business card.

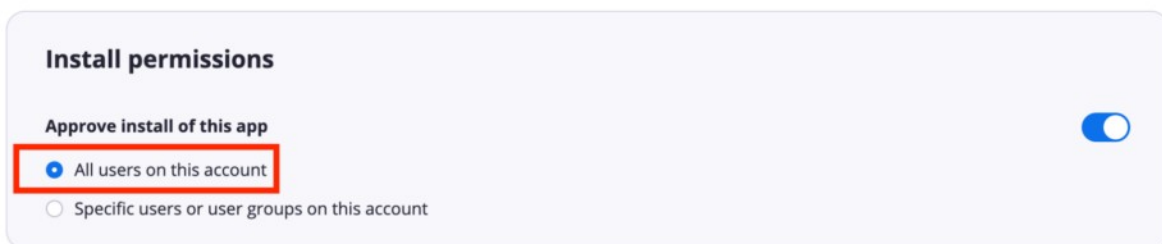




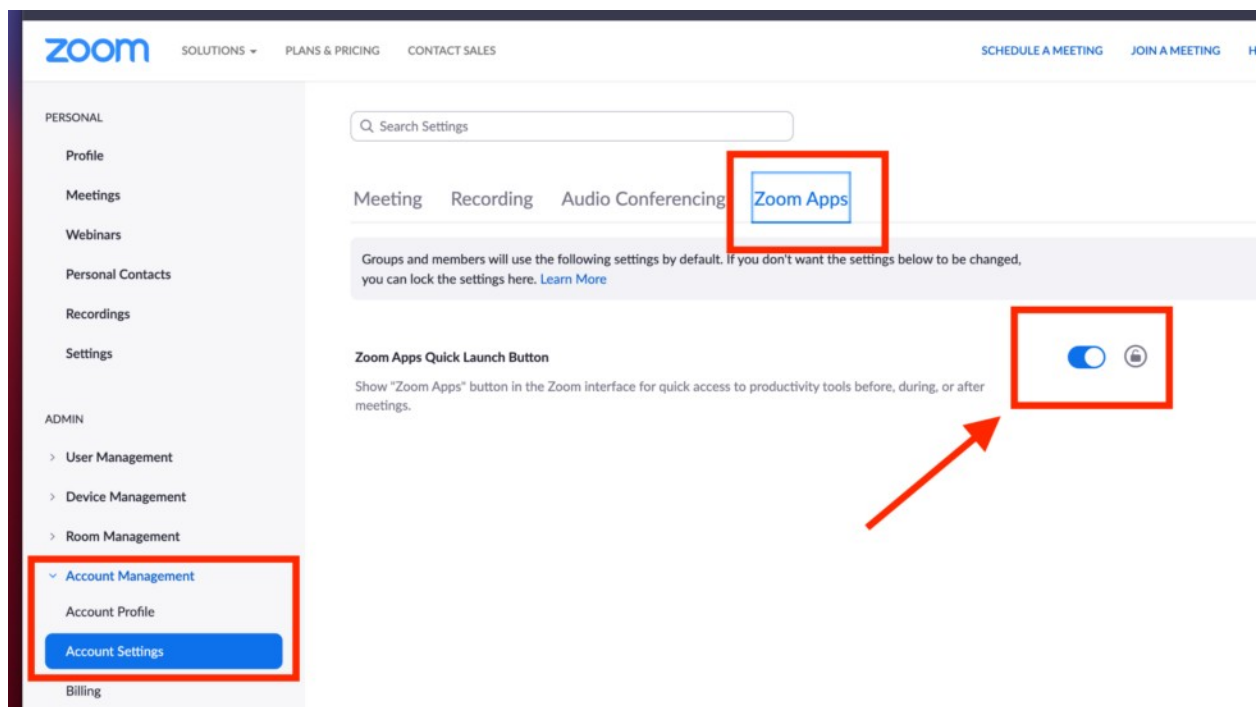
Never set a virtual background before? [Ensure](#) virtual backgrounds are turned on for your account and that your computer [meets requirements](#) to support virtual backgrounds.

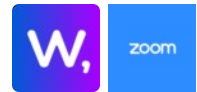
### Step 3: Make sure that Warmly is available for your company to use.

- Back at Warmly's [Zoom Apps Marketplace listing](#) ensure that all users can install it. If available for everyone, coworkers will naturally discover & try it out from the Zoom Apps tab of the Desktop Client



- In your [Zoom Admin settings](#), ensure that all users can use Warmly during a meeting by turning “Zoom Apps Quick Launch Button” on if it is not already . If the “Zoom Apps Quick Launch Button” is **toggle**d on, then users will be able to open Warmly to add their business card during a meeting. Only approved apps like Warmly will be available to users.





## New: Configure your company's Admin portal for management controls.

Warmly now allows for complete flexibility and customizability for IT and functional administrators. After approving Warmly at your organization, we **highly** recommend working with one of our IT product specialists (just email [security@warmly.ai](mailto:security@warmly.ai)) to configure the settings of your Admin portal. Admins are able to fully manage and customize user settings, roll out company branded backgrounds for use, approve on screen images and more.

Warmly offers complimentary IT enablement sessions (just 20 minutes is needed) to properly ensure that you are in full control of user's data and product experience.

The screenshot displays the Warmly Admin portal interface. On the left is a dark purple sidebar with navigation links: Video Canvas, Meeting, Contacts, Admin, and You. The main content area is titled 'Users' and includes a sub-header 'Below is a list of Warmly users that are a part of your organization. If you're looking for someone in your org and cannot find them on this list, it may be because they have not created a Warmly account yet.' Below this is a tabbed interface with 'Employees' and 'Admins' tabs. A search bar is at the top left of the table, and a '+ Add Employee' button is at the top right. The table lists users with columns for Name, Job Title, Company, Type, Last Activity, and Actions. The users listed are James Baker (CTO, Chase, Admin), Maria Franci (Head of UX, JPMorgan, Admin), Tiana Ekstrom Bothman (Sales Lead, JPMorgan, User), Lindsey Westervelt (People Manager, JPMorgan, User), Jaylon Vetrows (Product Marketer, Chase, User), Angel Aminoff (UX Writer, Chase, User), and Travis Baptista (Lead Product Designer, Chase, User). At the bottom right, it shows 'Rows per page: 7' and '1-5 of 13'.

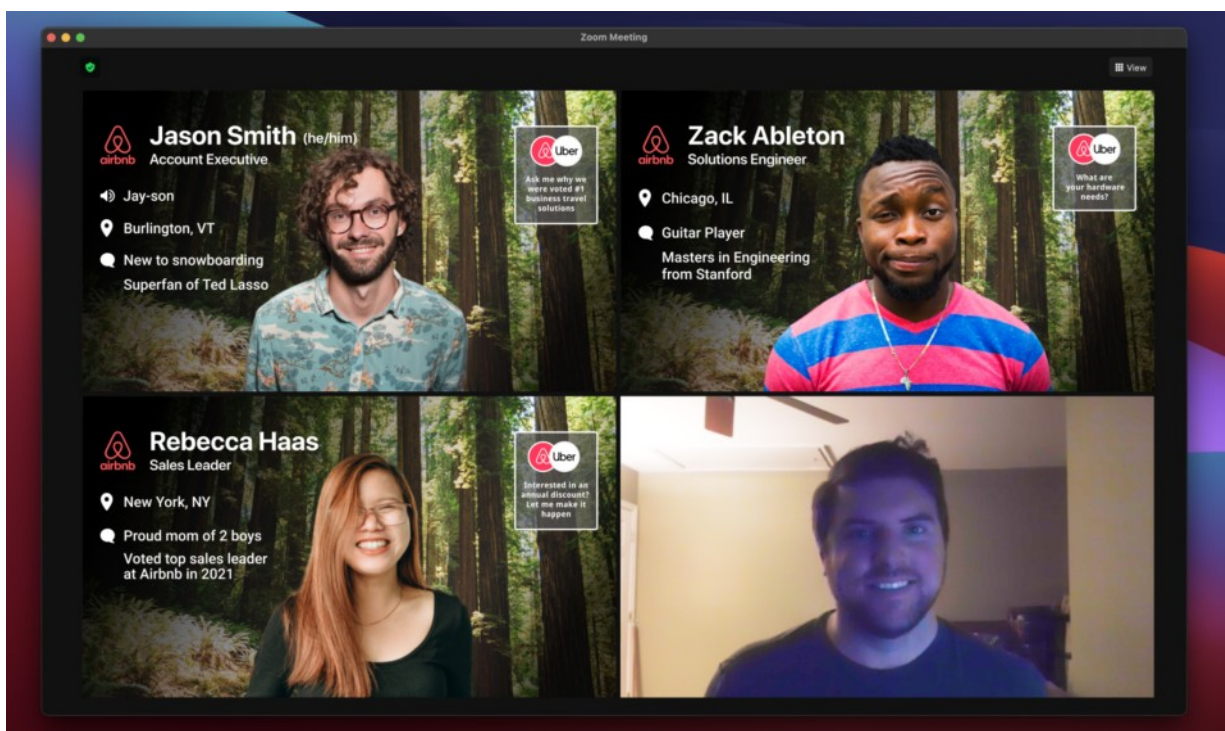
<input type="checkbox"/>	Name ↑	Job Title ↑	Company ↑	Type ↑	Last Activity ↑	Actions
<input type="checkbox"/>	James Baker james@chase.com	CTO	Chase	Admin	Today	
<input type="checkbox"/>	Maria Franci maria@jpmorgan.com	Head of UX	JPMorgan	Admin	Yesterday	
<input type="checkbox"/>	Tiana Ekstrom Bothman tiana@jpmorgan.com	Sales Lead	JPMorgan	User	3/21/2022	
<input type="checkbox"/>	Lindsey Westervelt lindsey@jpmorgan.com	People Manager	JPMorgan	User	2/21/2022	
<input type="checkbox"/>	Jaylon Vetrows jaylon@chase.com	Product Marketer	Chase	User	1/21/2022	
<input type="checkbox"/>	Angel Aminoff angel@chase.com	UX Writer	Chase	User	12/21/2021	
<input type="checkbox"/>	Travis Baptista travis@chase.com	Lead Product Designer	Chase	User	11/21/2021	



## Three ways to encourage Warmly use at your company

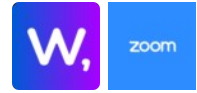
**#1:** Email your team or add a blurb to your company newsletter. Here's an example:

🚩 Ever wanted to add your business card into your Zoom meetings? We've now approved a Zoom add-on called Warmly (<https://warmly.ai/>) to help everyone look more professional in Zoom as well as foster a more inclusive culture. This ensures that our teammates can connect more easily, virtually. Head over to the Zoom desktop app to set it up in the "Apps" tab before or during a meeting! [Here's](#) a short demo video to learn more.



Some cool things you can try with Warmly:

- 🌈 Add name pronunciations, pronouns and a fun bio right over your shoulder
- 📄 Upload & share backgrounds with your teammates and compete to see who gets the most likes
- 📅 Run team ice-breakers, wish coworkers a happy birthday and express your reactions in meetings in 1-click
- 🔍 Learn more about customers & prospects by seeing their LinkedIn info & more right inside Zoom



## #2: Arrange free enablement sessions

Warmly offers free enablement sessions to all departments larger than 30 employees.

Did you know that Warmly has different benefits to different teams? We run specific enablement sessions for:

1. Customer Success teams - “How to delight & WOW your customers on Zoom”
2. Warmly for Sales teams - “How to land deals faster & reduce pre-meeting prep time by 90%”
3. Warmly for Marketing teams - “How to create brand consistency on Zoom for your company”
4. Warmly for People Experience / Human Resources Teams - “How create a connected virtual culture that reduces employee turnover”
5. Warmly for EDU professors/teachers - “How to create an engaging virtual classroom”

Please email [hello@warmly.ai](mailto:hello@warmly.ai) to connect our enablement teams with yours! Be sure to include the name of the Zoom employee who referred us so we can give them credit :)

## #3: Add Warmly to your new employee onboarding process.

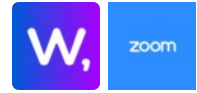
When a new hire sets up their Zoom account they should also be adding their business card into their Zoom background so they connect with new coworkers faster.

Please encourage employees to optionally add their name pronunciation & pronouns so their coworkers can respect their preferences from Day 1!

## Security & Privacy FAQs

Security and data privacy compliance is of the utmost importance to us at Warmly. To begin to give you peace of mind, remember that we have:

1. Passed Zoom’s high bar for a complete security & privacy review
2. Are additionally CCPA & GDPR compliant with regular vulnerability & penetration tests
3. Are used internally everyday by thousands of Zoom employees and several of Zoom’s largest Fortune 500 customers



If a vendor review process is an important part of your process, and you have additional requirements beyond what you originally asked Zoom itself for vendor compliance (since we're a sub-vendor for Zoom), please check out our additional data privacy resources.

#### Additional Data Privacy Resources:

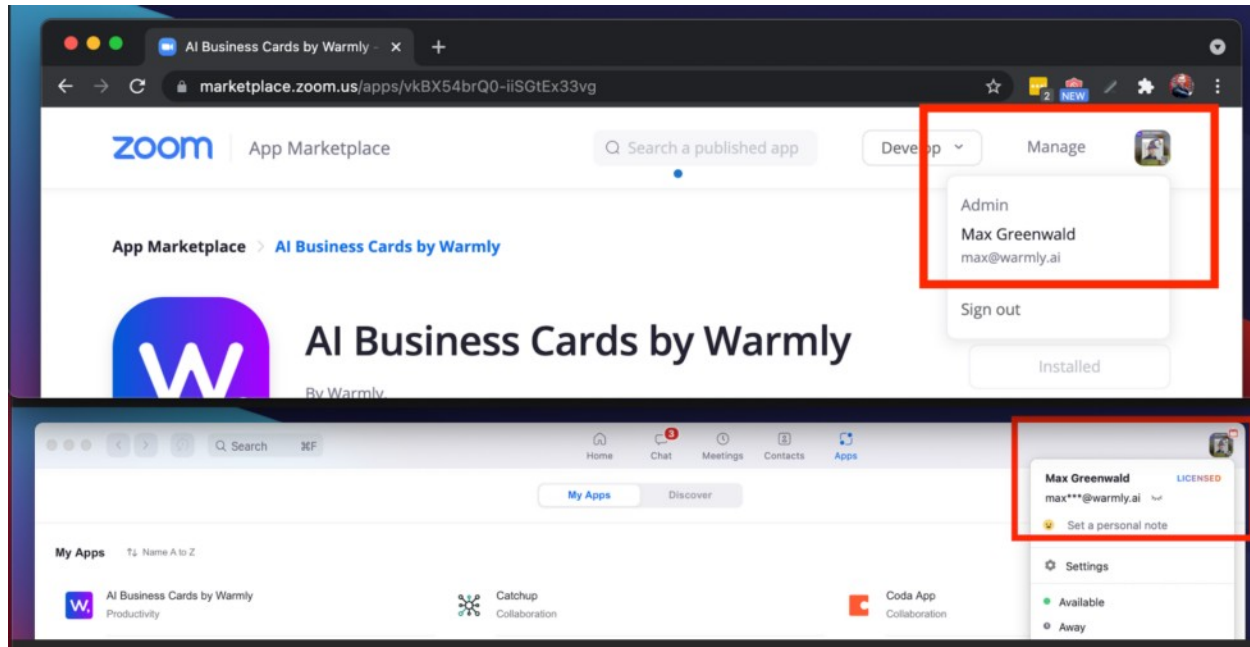
- Zoom Apps [Privacy Whitepaper & Data Management](#) and [security & compliance bar](#) to be a Zoom App partner
- Please see our [Warmly Data Privacy Overview](#) covering how we integrate with your systems and what information we need in order to provide you with our services.
- [Case Study](#) on how Warmly passed Zoom's extremely high bar for security to be used internally by all employees or [watch](#) this 3 minute security overview video
- Warmly's full security program at [security.warmly.ai/](#), standard [terms of service](#), standard [privacy policy](#), optional calendar integration [privacy policy supplement](#)

Upon request we can also provide security recommendations or confirmation from Zoom's CISO, Jason Lee. Finally, we've compiled [a few common FAQs](#) for your perusal on Warmly. If you are excited by Warmly's business cards but for security reasons cannot authorize us to connect to employee calendars (in order to display the publicly available information about meeting participants) we are able to provide a subset version of the product with just the business cards (please email [security@warmly.ai](mailto:security@warmly.ai) for details).

## Appendix

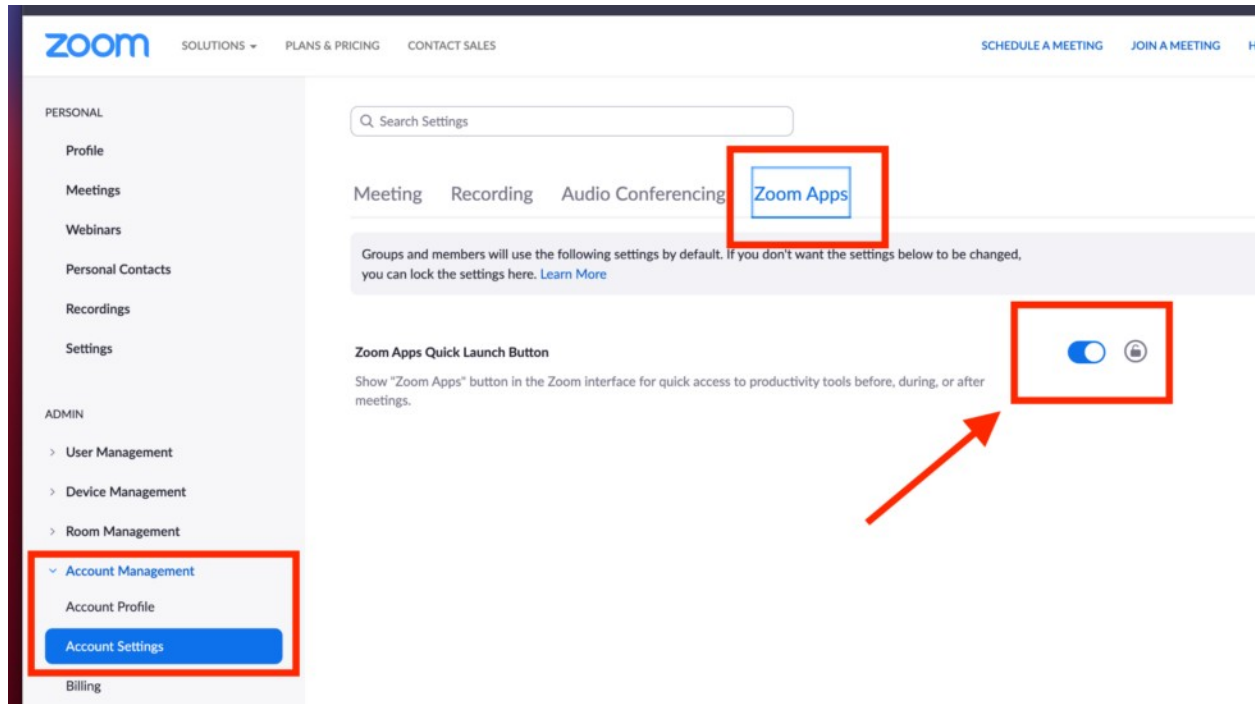
#### **Common issues for troubleshooting installation:**

1. Signing in with different accounts: To install an app in the desktop client for the first time from the web marketplace, you must be signed into the same Zoom account on both the web and the desktop client app (once you approve it for your users they can all install directly from the desktop client app)

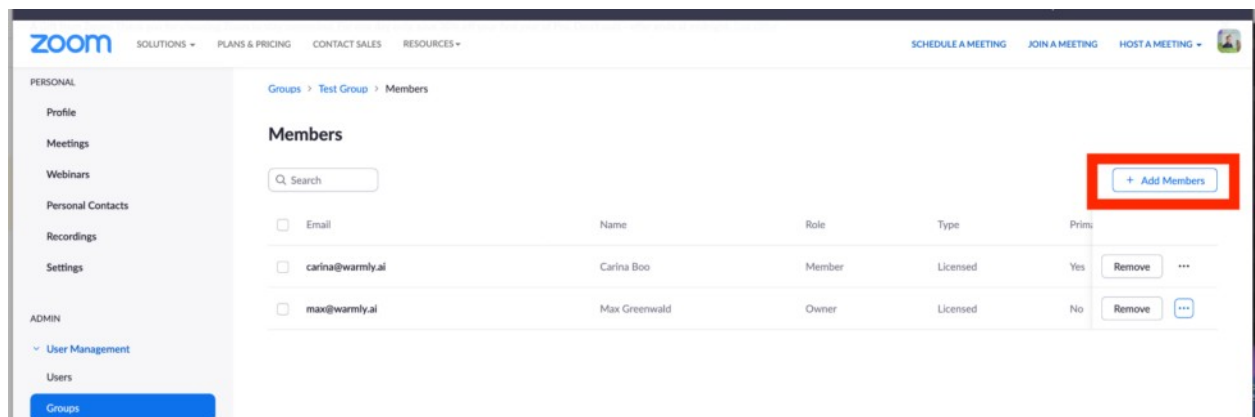


2. Being on a version of Zoom that support Zoom Apps You must be on Version 5.7.3 or later to use Zoom Apps but for an optimal experience, please upgrade to the latest version at <https://zoom.us/download>
3. Enabling Zoom Apps for your organization: If this is the first time your organization is trying a Zoom App you may need to enable Zoom Apps at the account level at <https://us02web.zoom.us/account/setting?tab=zoomapps>



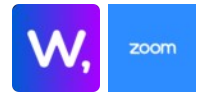


4. Setting up IT testing for a sub-group: Zoom allows you to add a sub-group in case you want multiple people on your team to test Warmly before deploying it more broadly. You can [add a group](#) and then add that group to be permitted to test Warmly. Please be sure to add **yourself** to the group as well since the administrator of the group must be added as a user



5. If all else fails: please see Zoom's article "[Admin deployment of Zoom Apps](#)" or email [zoom@warmly.ai](mailto:zoom@warmly.ai) and we'll help!

## Demo Account Details



Often Zoom IT admins will need to work with their security team or other IT counterparts to allow Warmly to connect to your Microsoft or Google Accounts. For Warmly to work properly (and beyond Zoom) we do require users to authenticate with both Zoom & Microsoft/Google.

We recommend testing the full experience of Warmly by simply connecting your personal email account or a dummy email account from either Google or Microsoft.

Alternatively, we offer a public demo account via Google for you to test the experience (the experience will mirror that of Microsoft as well):

- **User Name:** warmlydemo1@gmail.com
- **Password:** warmlyPW1!

To use the demo account, simply click “Sign in with Google” -> “use another account” -> and add in the credentials. From there you can change the information in the demo account (note that it is shared) to create your full Warmly Background Business Card and see other features.

If you'd like to have a private dummy account we can also make that for you. Please reach out at [security@warmly.ai](mailto:security@warmly.ai) for us to create this for you