



Business Connect™

PRODUCT REFERENCE

FEATURES & FUNCTIONALITY

Everything Business Connect does, area by area.

EDITION · OCTOBER 17, 2026

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BUSINESS CONNECT™ FEATURES & FUNCTIONALITY

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Business Connect is a two-way digital business card with a simple contact manager built in. You share your card by QR code or link, people send you their details back in one step, and every connection gets notes, tags, a follow-up date and a pipeline stage.

01 At a glance

Feature area	Status
Free trial and sign-in	Live
Digital business card	Live
Sharing: QR code, link, contact file, Google Wallet	Live
Public card page and two-way exchange	Live
Automatic emails on every connection	Live
Contacts, notes and tags	Live
Follow-ups and calendar reminders	Live
Pipeline stages and deal value	Live
Home dashboard	Live
Import and export	Live
Business Connect Pro (optional add-on)	Live
Help requests and My Business Hub	Live
Team cards (Pro)	Coming soon

02 Access, trial and sign-in

- Works in any phone or computer web browser. Nothing to install.
- A 14-day free trial starts when you create your account. No credit card needed.
- Sign in with email and password. Passwords must be at least 10 characters, with a **Show** button to check what you typed.
- Password reset by email from the sign-in screen.

- You confirm you are 18 or older and agree to the Terms and Privacy Policy when you sign up. If those change, the app asks you to agree again before you continue.
- A bar at the top counts down the days left in your trial.
- After the trial, Business Connect is a one-time purchase for one person, made with the same email you sign in with. A **Check again** button turns your access on right after you buy.
- If your trial ends without a purchase, nothing is deleted. Your card shows as paused to visitors until you buy.

03 Your digital business card

- Name (required), title, business, phone, email, website, booking link and city.
- A short line about what you do, up to 300 characters.
- A photo or logo, added as a web link. With no photo, your initials show instead.
- Social buttons for LinkedIn, Instagram, Facebook, TikTok, YouTube and X. Type a handle or paste a full link and the app builds the right address.
- Up to 10 YouTube playlist buttons, each with its own button name.
- Tap-to-call, tap-to-email, website and **Book a time with me** links right on the card.
- Only the fields you fill in show. Leave out anything you don't want to share.
- Edit any time. Changes show on your card link right away, so your QR code never needs to be reprinted.

04 Sharing your card

- Your own card link and QR code, made for you when you save your card.
- **Share my card** on Home shows a full-screen QR code for in-person exchanges.
- **Send link** opens your phone's share menu for text, email or any app, or copies the link.
- **Copy** your card link for an email signature or social bio.
- **Download QR** saves the QR code as an image that prints sharp at any size.
- **My contact file** downloads your own contact card (.vcf).
- **Preview as a visitor** shows your card exactly as others see it.
- **Add to Google Wallet** saves your card's QR code to Google Wallet on Android.

05 The two-way exchange

This is what the person you meet sees and does. They need no account and no app.

- Your card opens in their browser with a **Let's connect** header.
- **Save [your name]'s contact** downloads your contact file in one tap.
- A short form, **Share your details with [your name]**, asks for full name, email address and phone number. A name plus an email or phone is required.
- After they tap **Send**, they see a thank-you message and, if you have a booking link, a button to book a time with you.
- They land in your Contacts in the **New** stage, marked "Shared from your card."
- If the same person shares again with the same email, their existing contact is updated. No duplicates.
- The form tells them plainly that you receive what they enter and that they are not added to a mailing list.
- For protection, a card accepts up to 60 share-backs an hour.

06 Automatic emails

- **To you:** "New connection: [name] shared their details," with their name, company, title, email, phone and message, and a button to open Business Connect. Reply to it to write to them directly. Sent to the email on your card, or your sign-in email. Turn it off with **Email me when someone shares**.
- **To them:** when they enter an email, they get "Great connecting with you, [first name]!" from your name. It includes your full signature and social links and a button to save you to their contacts. Replies go to the email on your card.
- The connection email includes a short invitation for them to get their own Business Connect card. Pro members can turn this off.
- Built-in limits keep things friendly: no more than 3 connection emails to the same person in a day, and the same email is never sent twice.
- Fair use: under the Terms, accounts purchased after October 14, 2026 may send up to 1,000 automatic emails a month.

07 Contacts, notes and tags

- Everyone who shares from your card, everyone you add by hand and everyone you import, newest first.
- Add a contact with name, company, title, email, phone, website, where you met, tags, deal value and private notes.
- One-tap **Call**, **Text**, **Email** and **Website** buttons on each contact.
- **Save to phone** downloads any contact as a contact file.
- Their message from the share-back form shows at the top of the contact.

- Tags you choose, like partner or warm lead. Tags are tidied to lowercase and duplicates are removed.
- Private notes that only you can see.
- Search across name, company, title, email, phone, where you met, notes and tags.
- Filter by **All**, **Follow up** or any stage, and by tag.
- A history of how each contact was added and every stage change, with dates.
- Delete a contact with a confirmation step.

08 Follow-ups and reminders

- One follow-up date per contact, with an optional note about what to do.
- Quick picks: **Tomorrow**, **In 3 days**, **Next week**, **In a month**, or **Pick a date**.
- **Add to calendar** downloads a calendar event with a built-in reminder that works with Google, Apple and Outlook calendars.
- **Done** clears the follow-up when you have reached out.
- Follow-ups are marked Today or Overdue across the app, and the **Follow up** filter lists everyone who is due.

09 Pipeline tracking

- Six stages: **New**, **Contacted**, **Meeting**, **Proposal**, **Won** and **Not now**, each with a one-line explanation.
- Move a contact with one tap. Every move is saved in their history.
- Optional deal value on each contact.
- Home shows a count for each stage and the total open value of contacts in New, Contacted, Meeting and Proposal.

10 Home dashboard

- Four numbers: **Contacts**, **This week**, **Follow-ups due** and **Won**.
- A heads-up when follow-ups are overdue.
- **Up next**: overdue follow-ups first, then today's, then new contacts you haven't reached out to yet.
- A **Get started** checklist: make your card, add a way to reach you, make your first connection.
- Quick buttons to share your card, add a contact or open your card.
- A built-in **How-to** tab with step-by-step instructions.

11 Import and export

- Export all contacts to a spreadsheet (CSV) that opens in Excel or Google Sheets or imports into another CRM.
- Import contacts from a CSV file or by pasting, up to 2,000 rows at a time.
- Reads Name (required), Company, Title, Email, Phone, Website, Tags, Where we met, My notes, Stage, Follow-up date and Value.
- A file exported from Business Connect imports straight back in.

12 Business Connect Pro

Pro is an optional subscription. Everything above stays yours without it. Pro features are checked on our side, so they only show and send while Pro is active.

- **Automatic follow-up email:** one email from you, sent 1, 2, 3, 5, 7, 10 or 14 days after someone shares. You write the subject and message, with {first_name} filled in for you. Your signature, social buttons and booking link are added. It goes once per person, only to people who share after you turn it on, who gave an email and who are still New.
- **Brand color and logo** on your card, your card page and your emails. Choose a preset color or any color.
- **Your form question:** one extra question on the share-back form. The answer is saved on the contact and included in your new-connection email.
- **"Get your own card" invitation:** keep it or turn it off.
- **Card insights:** card views, share-backs, share rate, new contacts, wins and follow-ups sent in the last 30 days, plus weekly charts for the last 12 weeks. Your own visits to your card aren't counted.
- **Monthly lead report:** emailed on the 1st with card views, share-backs, new contacts, wins and won value, follow-ups sent, each stage and overdue follow-ups.
- Cancel any time with the **Cancel Pro** button. When Pro ends, your account goes back to Business Connect and nothing is deleted.

13 Help and My Business Hub

- **Get help** in the app: choose a topic and urgency, describe the problem and send. You get a request number and a list of your past requests.
- **My Business Hub** on acrossthetable.biz shows all your Across the Table apps, your purchases and replies to your help requests. Sign in with the same email using an emailed link.
- Direct support: info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz.

14 Privacy, security and your data

- **Your contacts are yours.** Each account can only read its own card and contacts. Your notes, tags, follow-ups and pipeline are private to you.
- **Visitors see only your card.** Anyone with your card link or QR code sees what you put on your card, and nothing else. The share-back form can only add a person to your contacts. It can never read them.
- **Visitors are told what happens.** The form explains that you receive what they enter, that they get one email from you if they give an email (plus one follow-up if you have Pro), and that there is no mailing list.
- **No mailing lists.** Business Connect sends only the connection emails, the optional Pro follow-up and your own reports. It does not send marketing to your contacts.
- **Download everything: Download my data** in Your data & privacy gives you one file with your account details, card and contacts. Export contacts gives you a spreadsheet.
- **Delete everything: Delete my account** permanently removes your account, card, contacts and email records right away, and your card link stops working. Backup copies expire within 30 days.
- **What goes to My Business Hub:** your email, plan, purchases, help requests and a few named moments, like making your card. Your contacts stay in Business Connect.
- **Payments happen at checkout on Stan.** Business Connect never sees your card number.
- **Keep sensitive details out.** Please don't save Social Security numbers, account numbers, passwords or health details in notes.
- **Privacy questions:** email info@acrossthetable.biz. Privacy requests are answered within 30 days.

15 Coming soon

- **Team cards (Pro):** add staff so everyone's leads land in one place. This is listed in the app as coming soon and is not available yet.

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