

Subject: BriefingEdge Version 13.1 New Features

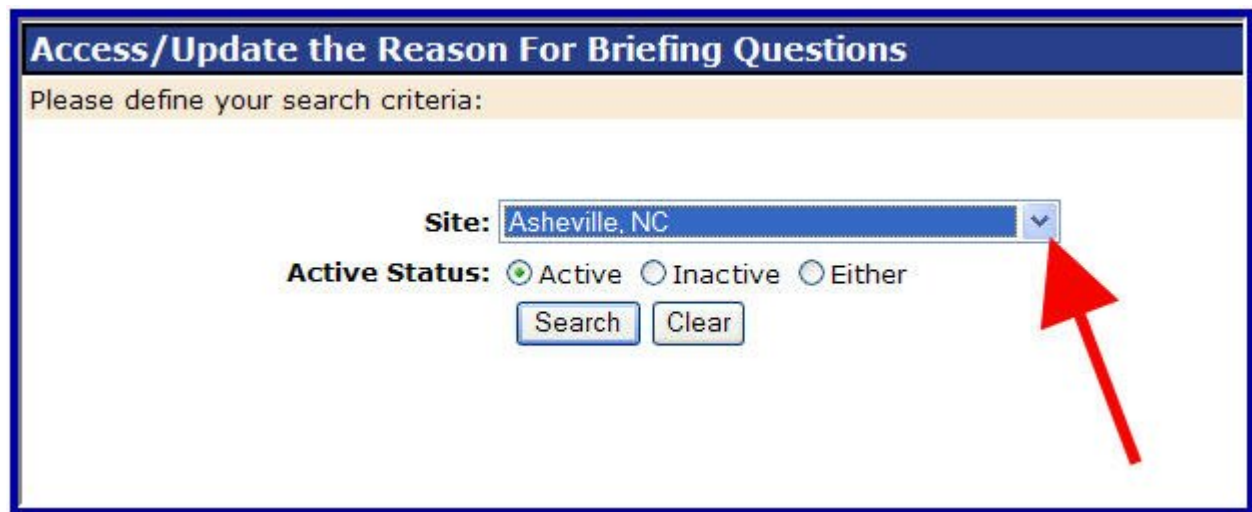
Managing Reason for Briefing questions – Why would you use this feature

In a multi-site environment, there are many instances where the questions asked in the briefing request form are not applicable to all sites. You may need to ask one series of questions in an executive briefing center and ask different questions in a technical design center.

BriefingEdge now lets you define different questions for each site based on the needs and the type of visits you host.

In previous versions of **BriefingEdge**, you had to initially provide **BriefingEdge** customer service with the "REASON FOR BRIEFING" questions as our technical team builds or updates your web site. With version 13.x, you have direct control over those questions including adding new questions, rewording old ones, removing them, and changing the order in which they are displayed. You would change

You will next be asked to specify which of your briefing centers (sites) is to be changed. This is also a change from older **BriefingEdge** versions, since now each briefing center can ask its own, unique, questions. From the drop-down list of briefing centers, click on the appropriate site location, then click on the "Search" button.

A screenshot of a web application interface titled "Access/Update the Reason For Briefing Questions". The interface has a blue header bar with the title. Below the header, there is a light yellow box with the text "Please define your search criteria:". The main content area is white and contains a "Site:" label followed by a blue dropdown menu currently showing "Asheville, NC". Below the dropdown, there is an "Active Status:" label with three radio button options: "Active" (which is selected), "Inactive", and "Either". At the bottom of the form are two buttons: "Search" and "Clear". A red arrow points to the dropdown menu.

What you will next see is a very complex screen which gives you the flexibility to modify and organize your questions. So let's break it down into its components.

There are three primary fields on this screen:

- (1) the question as it is to appear on the screen,
- (2) supporting text hints for the question, and
- (3) whether or not the question needs to be answered (mandatory) or not (optional).

They are actually displayed in the reverse order than I have just described as shown below. The arrows (and descriptions) shown where the corresponding fields are shown on the visit request "Reason for Briefing" screen.

Updating REASON FOR BRIEFING Questions for Chicago Briefing Center Select New Site

Display Order	Required Field?	Question (maximum 256 chars)	Help Text (maximum 256 chars)	Last Updated	*Usage Count
Remove 10	Yes <input type="checkbox"/>	What are your objectives for this briefing?	(Please describe specific goals and what is at stake)	1/19/2010 8:37:01 AM	15
Remove 20	Yes <input type="checkbox"/>	Client/Corporate Overview	(Give a brief overview of the company/division attending)	1/19/2010 8:37:01 AM	15
Remove 40	Yes <input type="checkbox"/>	Describe the US_Tech services your client currently uses or is interested in.		1/19/2010 8:37:01 AM	15
Save Changes					
Add New 50	No <input type="checkbox"/>				

* Usage Count is the number of requested visits and upcoming tentative/confirmed visits that currently have responses stored for that specific REASON FOR BRIEFING question. If the count is not zero for a particular question, and you change the text on that question, be aware that the existing responses for that question will now display under the new text.

A "YES" indicates the Requester must answer the question.
A "NO" will designate the question as optional.

The "Question", entered exactly as you wish for it to appear on the screen.

Any 'Helpful' text to support the question, entered exactly as you wish for it to appear on the screen.

Visit Information Chicago Briefing Center Site Center Calendar Update

Customer Briefing Visit # 749 Visit Date: 2/8/2010 9:00 am - 5:00 pm
ADPM - Workshops

Do not use your browser's Back or Forward keys.
Use the BriefingEdge buttons to navigate through the system.
All fields marked with an asterisk (*) are required.

Is this visit tied to a specific opportunity? Yes No

* Please indicate the revenue amount associated with this opportunity. \$ 1,234,567

* Expected Close Date for this opportunity: 1/31/2010

What is the current annual revenue that this customer generates with US_Tech? \$

* What are your objectives for this briefing? (Please describe specific goals and what is at stake)
objectives go here

* Client/Corporate Overview (Give a brief overview of the company/division attending)
overview description of the client goes here

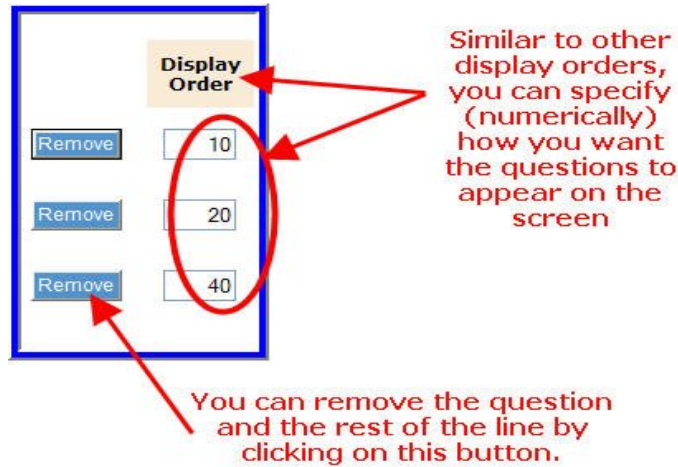
* Describe the US_Tech services your client currently uses or is interested in.
description of current services goes here

Where are you in the sales process?
Strengthen Relationship (Customer and Partner Briefings)

[Update](#)

"Reason for Briefing" screen (#4 of 6) as seen by the Requesters

The left side of the screen shows the Display Order (see "Display Order" discussion above), and has a remove button. The remove button will remove the entire line, and correspondingly, that entire question. Please use the remove button sparingly since it **may** alter later results. The display order field will determine the order in which the questions are asked, lower numbers before higher.



On the right side of the screen, you will see a "Last Updated" column showing you the date and time when you last changed this question.

You will know exactly when this question was last modified

Last Updated	Usage Count
1/19/2010 8:37:01 AM	15
1/19/2010 8:37:01 AM	15
1/19/2010 8:37:01 AM	15

* Usage Count is the number of requested visits and upcoming tentative/confirmed visits that currently have responses stored for that specific (stock/in stock) question. If the count is not zero for a particular question, and you change the text on that question, be aware that the existing responses for that question will now display under the new text.

Also (and finally) on the right side of the screen, you will see a "Usage Count" column with an appropriate entry for each question. This column tells you how many visits at your site have already stored an answer to that question. This is important in that if you change the actual question after 50 briefings were submitted under the "old" question, the data may no longer be valid since **BriefingEdge** doesn't remove the old questions whenever you modify the text.

Last updated	*Usage Count
5/28/2018 8:37:05	15
5/28/2018 8:37:05 AM	15
5/28/2018 8:37:05 AM	0

Usage Count permits you to know how many "answers" to the question are already being stored on your web site. If you significantly change that question, the stored answers may no longer apply, but will still show up.

* **Usage Count** is the number of requested visits and upcoming tentative/confirmed visits that currently have responses stored for that specific REASON FOR BRIEFING question. If the count is not zero for a particular question, and you change the text on that question, be aware that the existing responses for that question will now display under the new text.

Managing Reason for Briefing questions – What else is affected

Besides the screens that may have different questions from one site to another, the **Briefing Package report** will display the questions from that site along with whatever answers were supplied.