



**Subject: BriefingEdge** Version 13.1 – Report Enhancements

## Briefing Package Report

This report has been enhanced to provide additional information that may be helpful to presenters and to executives running reports. The purpose of this report is to display every single detail that was captured and then updated, for a single visit.

There are lots of ways to get to this report. When you have a visit opened to work on it, the Briefing Package report is one of three available from the left hand menu.

**Visit Information** Chicago Briefing Center Site Erase This Visit

**Customer Briefing**

**Information**

Account Team Information

Customer Information

Reason for Briefing

Agenda Details

Attendees

Evaluation Forms

Reports

**Briefing Package**

Agenda Report

Meals Report

Help

[Return to List](#)

Visit # 772 Visit Date: 4/1/2010 8:00 am - 4:00 pm  
Matthews Cable Modems

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

Type of Visit: Customer Briefing

\*Visit Status: Confirmed **If Cancelled, Reason:**

Visit Classification: Direct Sales

\*Business Segment-->Country/Area: US--> Eastern

Is this an off-site briefing Briefing?:  Yes  No

\*Estimated Total Number of Customer Attendees: 6

\*Visit Length: One day [Expand to 7 days](#)

\*Primary Visit Date: 4/1/2010 8:00 am

\*Dress Code:  Business Professional  Business Casual

Non-disclosure Agreement Required:  Yes  No

**Logistical Information:** (Check all that apply. Use adjoining space for details such as flight or hotel info.)

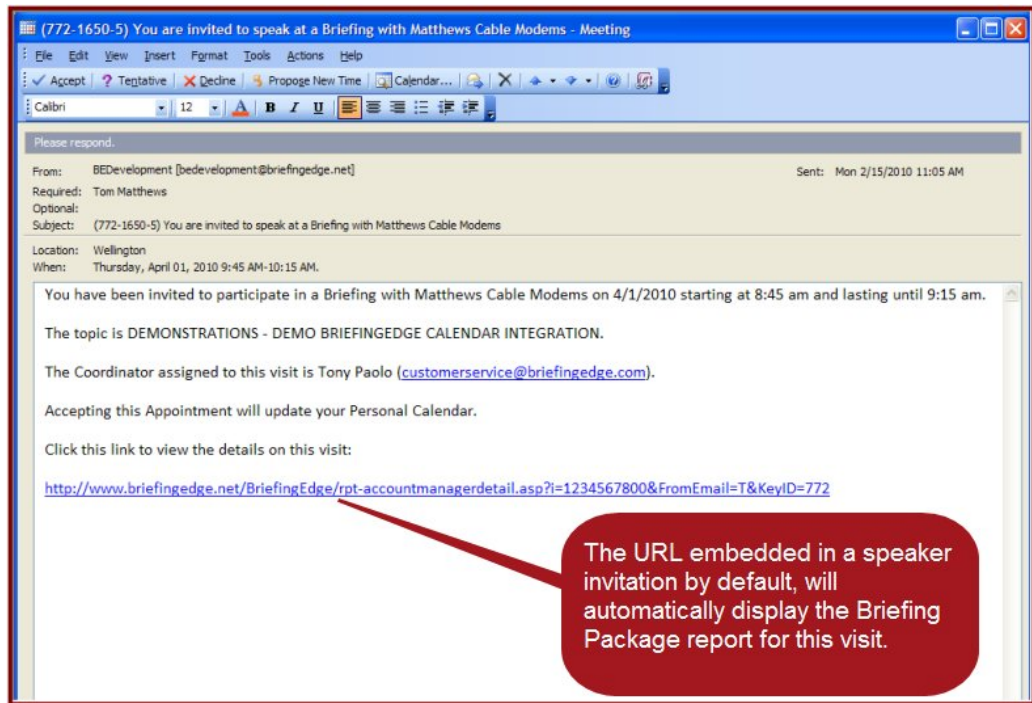
Expenses Associated with this Visit

Flight Information AA flight #3246, arriving on 3/31/2010 at 6:45 pm

Hotel Reservations The Westin, reservation #4455

One of 3 reports available once the visit is opened.

Every invitation contains a link to the Briefing Package Report from within the body of the invitation. This enables a speaker to see all of the details of this visit without requiring a login.



But the most common way to view the Briefing Package report is by clicking on the visit # from almost any summary level report.

**Detailed Program Summary**

Sites: All  
 Visit Status: Tentative + Confirmed + Tracking + Closed  
 Visit Classification: All  
 Visit Type: All  
 Visit Date Range: From 2/15/2010  
 Sorted by: Site, Visit Date

Report run 2/15/2010 11:00 AM  
 Hold your mouse over any item displayed in this color to view additional info

Visit #	Site	Status	Expected Close Date	Visit Type	Visit Date	Customer	Unique Customer Count	Business Segment	Country/Area	Where are you in the sales process?	Potential Revenue (\$)	Visit Classification	Account Manager	Coordinator
774	Chicago Briefing Center	Tentative	N/A	Board of Directors Meeting	2/16/2010	Spline	0	Global	World Wide			Direct Sales	Tom Matthews (AE)	
763	Chicago Briefing Center	Tentative	1/12/2012	Customer Briefing	2/22/2010	Big Betty's Bakery	1	Global	World Wide	New Customer (Customer Briefing only)	2,222,222	Direct Sales	Tony Apollo	tomCoord tom
757	Chicago Briefing Center	Tentative	N/A	Customer Briefing	3/16/2010	ABPM - Welcome	1	US	Eastern			Direct Sales	Tom (AE) Matthews	Kath matthews (admin)
755	Chicago Briefing Center	Tentative	N/A	Customer Briefing	3/22/2010		1	US	Eastern			Direct Sales	Kath matthews (admin)	Kath matthews (admin)
751	Chicago Briefing Center	Tentative	N/A	Customer Briefing	3/25/2010	ABPM - Tour Day	1	US	Eastern			Direct Sales	Tom (AE) Matthews	Kath matthews (admin)
752	Chicago Briefing Center	Tentative	N/A	Customer Briefing	3/29/2010	ABPM - Tour Day	1	US	Eastern			Direct Sales	Tom (AE) Matthews	Tony Paolo
772	Chicago Briefing Center	Confirmed	5/31/2010	Customer Briefing	4/1/2010	Matthews Cable Modems	1	US	Eastern	Strengthen Relationship (Customer and Partner Briefings)	55,555	Direct Sales	Tom Matthews (AE)	Tony Paolo
728	Princeton Innovation	Confirmed	N/A	Training	2/25/2010	Acme Telecommunications	0	US	Southern			Direct Sales	Tom TheAdministrator	Angellina Jolie

Clicking the visit # from almost any report, will drill down to the Briefing Package report.

There have been quite a few improvements in this report. These are illustrated below starting by showing the agenda screen from which it derives much of its data.

**Starting time for each agenda item is now displayed**

**Overridden topics will display as they do on the Agenda report**

**New comment field allows the requester to communicate with the coordinator about the topics / agenda**

Item Status	Schedule	Topics and Speakers
<b>Awaiting Response to Invitation</b> (sent 1/27/2010) Resend Invitation Send Cancellation Declined by Speaker Confirm Agenda item history	8:00 am to 8:45 am Change Details <input checked="" type="checkbox"/> Include on the Agenda Report	Topic: Event Check In (Category: Corporate Information) <b>Display on Agenda as:</b> Event Check In and Welcome Speaker and Title: Kamster Matthews -President, Briefing Edge Solutions <b>Display on Agenda as:</b> Room: Wellington <input checked="" type="checkbox"/> Include in Evaluation
<b>Awaiting Response to Invitation</b> (sent 2/15/2010) Resend Invitation Send Cancellation Declined by Speaker Confirm Agenda item history	8:45 am to 9:15 am Change Details <input checked="" type="checkbox"/> Include on the Agenda Report	Topic: Demo BriefingEdge Calendar Integration (Category: Demonstrations) <b>Display on Agenda as:</b> Demo BriefingEdge Calendar Integration Speaker and Title: Tom Matthews -IT Manager <b>Display on Agenda as:</b> Room: Wellington <input checked="" type="checkbox"/> Include in Evaluation
<b>Tentative</b> Confirm Remove Change Details or Speaker	9:15 am to 9:55 am <input checked="" type="checkbox"/> Include on the Agenda Report	Topic: Demo BriefingEdge Agenda Builder (Category: Demonstrations) <b>Display on Agenda as:</b> Demo BriefingEdge Agenda Builder Speaker and Title: - <b>Display on Agenda as:</b> Room: Wellin <input type="checkbox"/> Include in Evaluation

On the Agenda Report, display the scheduled start time for each agenda item

**Agenda Notes & Comments**

This comment field starts out on the topics and meals screen and provides a means by which comments about the topics, meals or agenda can be relayed to the coordinator.

The report now shows (1) Agenda starting times, (2) the overridden topic instead of the selected topic and (3) comments entered from either the topics screen or the agenda screen.

**1**

**2**

**3**

Start Time	Category	Topic	Speaker
8:00 am	Corporate Information	Event Check in and Welcome	Kamster Matthews
8:45 am	Demonstrations	Demo BriefingEdge Calendar Integration	Tom Matthews
9:15 am	Demonstrations	Demo BriefingEdge Agenda Builder	

**Agenda Comments:** This comment field starts out on the topics and meals screen and provides a means by which comments about the topics, meals or agenda can be relayed to the coordinator.