



**Subject: BriefingEdge** Version 13.2 New Features

## E-Mail Acknowledgements of Visits – Why would you use it?

With **BriefingEdge**, your entire sales team can self-register and independently request visits. (New domain security features allow selected business partners to also register and request visits). To alert the briefing center staff of new, incoming requests, **BriefingEdge** is fully integrated with MS Outlook to make sure that the communications lines between requesters and briefing center staff remain short.

Prior to release V13.2, **BriefingEdge** utilized an access level called “Site Administrator”, which was solely used as a “place-marker” within each briefing center to designate a person or common e-mail address which would receive notification about visit requests at their briefing center(s). Since these email addresses were commonly a duplicate of one person already utilizing Coordinator or Administrator access levels, the maintenance of user accounts became complicated and time-consuming.

In versions prior to 13, we started the process of consolidating coordinator accounts by no longer requiring a separate coordinator account for the same user at multiple sites. We introduced the idea of one coordinator account allowing an administrator to simply check off the sites to which this coordinator (or whatever you call your coordinator) can work on visits.

**BriefingEdge** Version **13.2** expands on this technique by **eliminating** the Site Administrator access level while enabling you to **assign** site administration / site configuration capabilities to one or more coordinators.

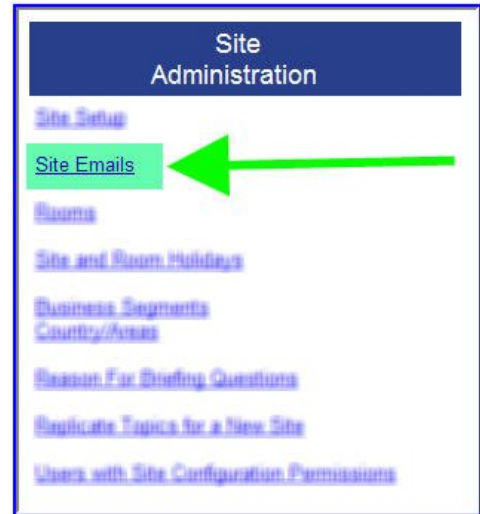
Administrators will now be able to designate which briefing center staff users will receive notification of incoming requests, as well as which users have additional site configuration privileges (those privileges are described in another document and can be found [here](#)); while **no longer** requiring the creation of separate accounts.

Since an Administrator can now specify who at each briefing center will be notified of new visit requests, the need to maintain a separate “**Site Administrator**” access level and users belonging to that access level, has disappeared.

Prior to implementation, we have developed reports and conversion programs that detail who uses a site administration account as their primary login (based on login frequency) versus who uses a site administration account simply to receive copies of incoming requests. We will adjust their accounts accordingly.

## E-Mail Acknowledgements of Visits – How do I use it?

A new function has been created (under the Site Administration column from the administration menu) just to select which person(s) will receive visit notifications from one site to another.



The image shows a screenshot of the 'Email Setup for Sites' screen. The title is 'Email Setup for Sites'. Below the title is a yellow box with the text 'Please define your search criteria:'. Below this is a dropdown menu labeled 'Site:' with 'Chicago Briefing Center' selected. Below the dropdown is a 'Continue' button. A green arrow points to the 'Continue' button from the right.

After you select the “**Site Emails**” function, the screen to the left will appear. You will need to specify which of your site(s) you wish to work on (if you have more than one) since they can all be configured independently.

The next screen you will see lists users currently assigned to receive copies of incoming requests for this particular site (in **bold** if they are active, or **subdued**, if they are currently deactivated).

**Email Setup for Chicago Briefing Center** Select New Site

**Email addresses currently set up to receive Visit Request emails for Chicago Briefing Center**

<b>Remove</b>	<b>Activate</b>	Tony Paolo	customerservice@briefingedge.com
<b>Remove</b>	<b>Deactivate</b>	Buck Rogers	tmatthews@briefingedge.com

---

**Add an email address to receive visit request emails for Chicago Briefing Center**

Administrators and Coordinators for Chicago Briefing Center:

**Set up this email address to get Vist Request emails**

Visit Request Emails are the acknowledgement emails that are automatically sent out when a new visit is requested. The emails go to the Account Manager and to each email address set up on this screen.

Removing or Deactivating an email address on this screen does not remove or deactivate the corresponding userid; it only removes that email address from the list of email addresses that receive visit request emails.

On the upper part of the screen, there are buttons to **remove** someone from the list, and to **deactivate** them but leave them on the list (or, if they are already on the list but **subdued**, you can **activate** them).

On the lower portion, you can get a drop-down of all the Coordinator and Administrators for the selected site location, and to **add** any of their email addresses to the list.

### Why would you REMOVE an e-mail address?

Removing is a permanent function used when a person is no longer "on the job" with the briefing center, or for some other reason they will no longer need to receive visit notifications.

### Why would you DEACTIVATE an e-mail address?

Deactivate is a temporary designation when you feel that they might, or know they will, come back, such as if they were going away for a week or two. You might want to suspend their link to receiving email with the ability to reinstate it.