



Subject: BriefingEdge Version 13 Account Plans/Profiles

Account Plans / Account Profiles – why use this feature

There are times where your company captures other information about a customer or an opportunity from another computer system. If it's important to the briefing program to have access to this information, you should probably use the account profile upload feature.

This is an enhancement to an existing feature allowing you to upload a document containing additional information about this customer or the opportunity. Initially, it was designed to allow for the recording of data that **BriefingEdge** did not capture but which might be helpful when planning and executing this briefing.

Previous versions allowed you to upload and view *DOC* or *PDF* files only. Version 13 adds support for new document types including spreadsheets. The list of document types that is supported is found on the upload screen itself and is shown below.

A screenshot of the document upload interface. At the top, it says "Identify the document to be uploaded as the TAS or Account Plan for this Visit." Below this, a red oval highlights the text "(It must be in .doc, .docx, .pdf, .xls or .xlsx format.)" with a red arrow pointing to it. There is a text input field with a "Browse..." button to its right. At the bottom, there is a blue "Upload" button.

Once the document has been uploaded, **BriefingEdge** displays the date and time when the document was uploaded. It will automatically launch the appropriate viewer when you press the **View uploaded....**

A screenshot of the document upload confirmation screen. At the top, it says "*Customer Status:" followed by a dropdown menu showing "Prospective Customer". Below this, there is a blue box with the text "TAS or Account Plan for this Visit" and a "Help" button. Underneath, it says "(Last Uploaded 10/2/2009)". There are two buttons: "Upload the TAS or Account Plan..." and "View uploaded TAS or Account Plan".