

Expanded Access for Requesters

On the System Setting Screen, from the Administration Menu, use this field to determine the number of days prior to a confirmed visit that Requesters/ Account Execs are allowed to edit the Attendees and Reason for Briefing screens. We call this the restricted time frame.

System Settings Save Changes

Please be aware that changing these settings will affect all your briefing program's sites.

Automatic System Triggers

How many calendar days before a confirmed scheduled visit, should a reminder email be sent out? (0 means never)

How close to a confirmed visit date, is the Account Manager still allowed to update attendees and Reason For Briefing information? Up to day(s) before the visit.

How many calendar days can a visit request remain "incomplete" before BriefingEdge automatically removes it? (0 means indefinitely)

Account Manager Restrictions

Can Account Managers request meals for a requested visit?

Can Account Managers identify preferred speakers for a requested visit?

Can Account Managers access the Topic Notes section for topics in a requested visit? (Only applicable if Topic Notes are turned on, below.)

Event Scheduling Parameters

Meeting Owner fields are displayed for Event requests:

If the visit is outside of the restricted time frame, the Attendees and Reason for Briefing screens are open for editing as shown below, while all other screens are greyed out and inaccessible.

Visit Information Chicago Briefing Center Site

Customer Briefing Visit Date: Monday, 1/30/2012 9:00 am - 5:00 pm
Sol-Advantage

Do not use your Browser's Back, Forward keys. Use the BriefingEdge buttons to navigate through the system.

Type of Visit:

***Visit Status:** Confirmed

***Visit Classification:**

***Theater-->Operating Area:**

Is this an off-site Briefing?: No

Estimated Total Number of Customer Attendees: 5

Primary Visit Date: 1/30/2012

Visit Length: 1 day

Dress Code: Business Professional

Comments on Session:

Left Sidebar: Customer Briefing, Schedule, Account Manager, Customer, Reason for Briefing, Agency Details, Attendees, Survey Forms, Reports, Briefing Package, Agenda Report, Meals Report, Itinerary Report, Help, Return to List