NEXUS HUB | BRIEFING REQUEST FORM

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Programs - Request Form

Starting from now, Request Form can be set up per Center and specific engagement type which makes it extremely flexible.

First, the user will choose the specific center he wants to set up Request Form and then a specific engagement type.

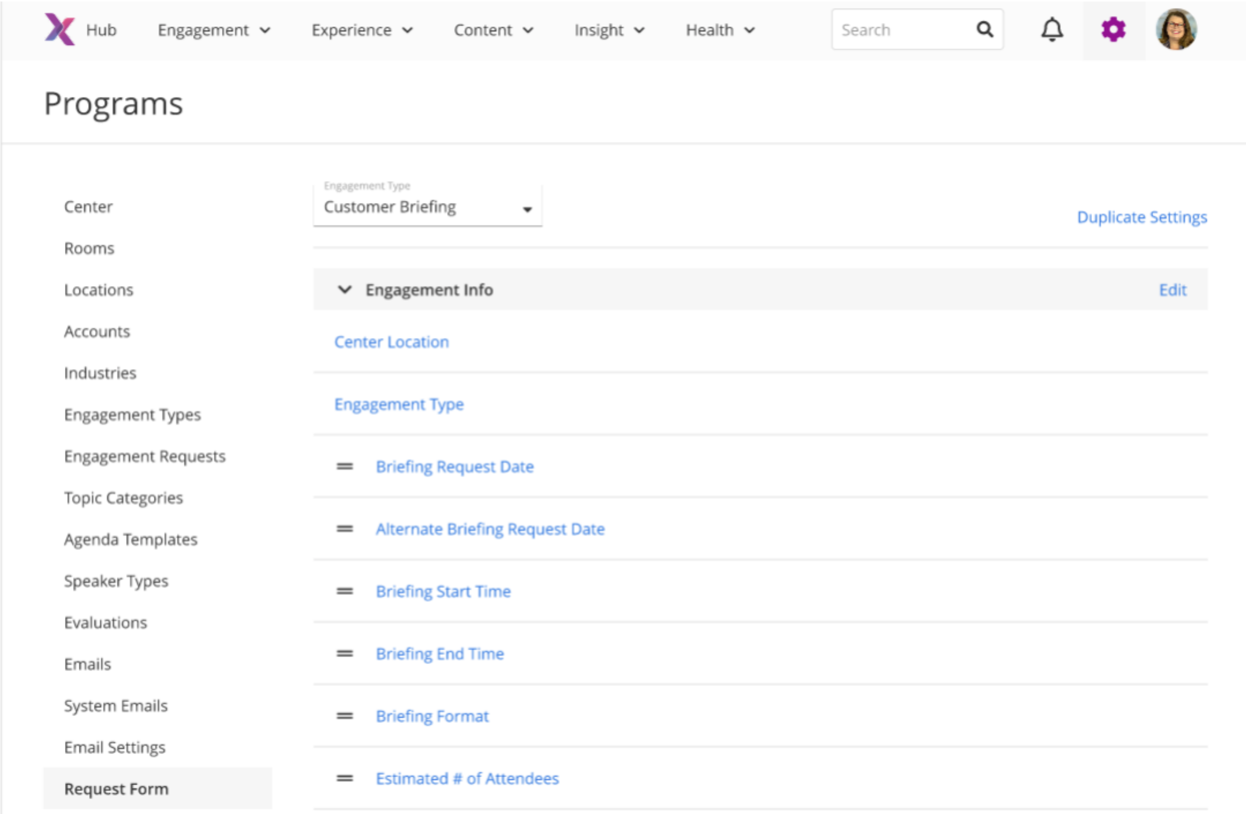


Figure 1. Programs - Request Form

Standard Sections

RF (request form) consists of 5 sections for all engagement types except “Internal”.

Engagement type	Section	Fields
• Customer • Partner • Internal • Test	• Engagement Info • ***Cannot be disabled***	• Center Location • Engagement Type • Briefing Request Date • Alternative Briefing Request Date • Briefing Start Time • Briefing End Time • Briefing Format • Estimated # of Attendees • Briefing Objectives and Notes

		• Requester Name • Requester Email • Secondary Time Zone
• Customer • Partner • Test	• Opportunity Details • ***Can be disabled***	• Opportunity Name • Opportunity ID • Opportunity Amount • Opportunity Probability (%) • Estimated Opportunity Close Date • Opportunity Description
• Customer • Partner • Test	• Account Details • ***Cannot be disabled***	• Account Name • Account CRM ID • Account Industry • Account Segment • Account Region • Account Territory • Account Revenue • Account Description
• Customer • Partner • Internal • Test	• Attendees • ***Can be disabled***	• *no fields available
• Customer • Partner • Internal • Test	• Proposed Agenda Topics • ***Can be disabled***	• *no fields available

Sections can be expanded and collapsed except "Attendees" and "Proposed Agenda Topics**"**. Users can change section names and show/hide them.

User can also restore defaults for all sections.

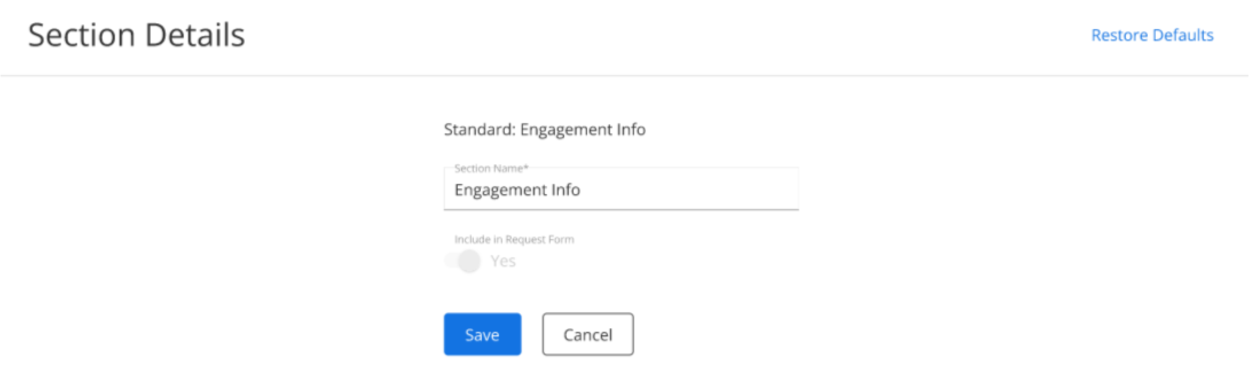
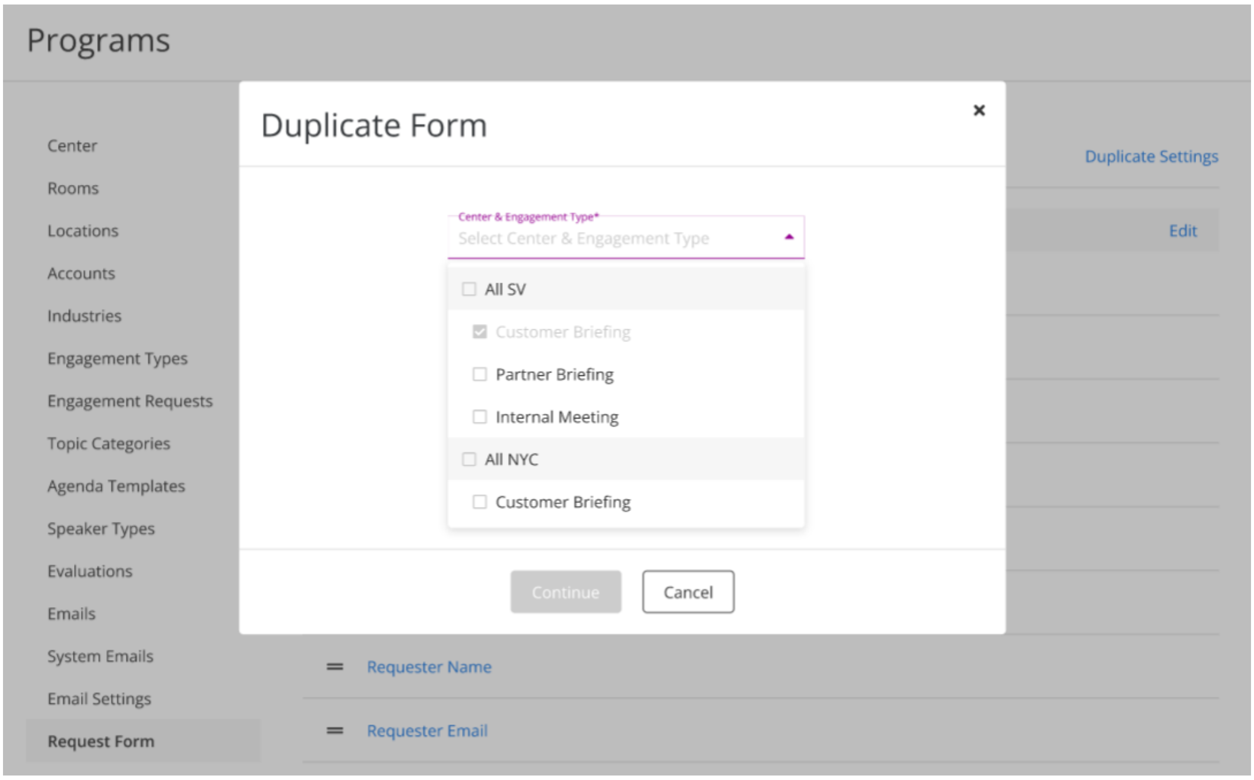


Figure 2. Section's Editing

Duplicate Settings

The User can duplicate Request Form settings from one Engagement Type to another by clicking on "Duplicate Settings" text link.



Standard Fields

Each section will have a default set of standard fields that can be re-ordered within the section. Only ***Center Location*** and ***Engagement Type*** cannot be re-ordered and will be always first to enter inside the Request.

For all the standard fields, the user can change Field Label and Field Helper Text. Some of them can also be turned off on the request and marked as “optional”.

Fields	Values
Engagement Info section	
• Center Location	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled) • Centers will be pulled from the Hub
• Engagement Type	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled) • Engagement Type will be pulled from the Hub
• Briefing Request Date	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Alternative Briefing Request Date	• Include in Request Form = Yes • Field Required = No
• Briefing Start Time	• Include in Request Form = Yes • Field Required = No
• Briefing End Time	• Include in Request Form = Yes • Field Required = No
• Briefing Format	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled) • Formats will be pulled from the Hub
• Estimated # of Attendees	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Briefing Objectives and Notes	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Requester Name	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Requester Email	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)

• Secondary Time Zone	• Include in Request Form = No • Field Required = No • Secondary time zones will be pulled from the Hub
Opportunity Details section	
• Opportunity Name	• Include in Request Form = Yes • Field Required = No
• Opportunity ID	• Include in Request Form = Yes • Field Required = No
• Opportunity Amount	• Include in Request Form = Yes • Field Required = No
• Opportunity Probability (%)	• Include in Request Form = Yes • Field Required = No
• Estimated Opportunity Close Date	• Include in Request Form = Yes • Field Required = No
• Opportunity Description	• Include in Request Form = Yes • Field Required = No
Account Details Section	
• Account Name	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Account CRM ID	• Include in Request Form = Yes • Field Required = No
• Account Industry	• Include in Request Form = Yes (Disabled) • Field Required = Yes (Disabled)
• Account Segment	• Include in Request Form = Yes • Field Required = No
• Account Region	• Include in Request Form = Yes • Field Required = No
• Account Territory	• Include in Request Form = Yes • Field Required = No

• Account Revenue	• Include in Request Form = Yes • Field Required = No
• Account Description	• Include in Request Form = Yes • Field Required = No

User can also restore defaults for all fields.

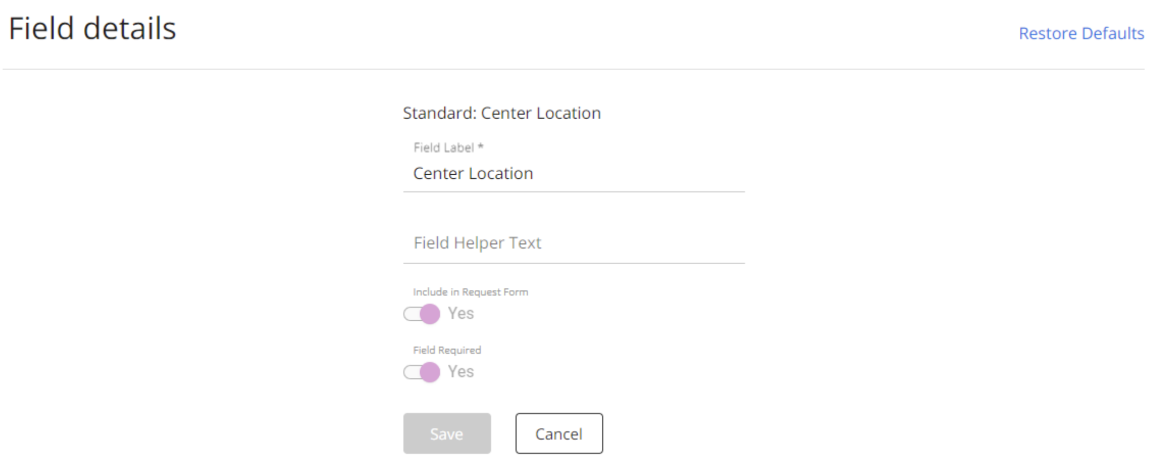


Figure 3. Standard Field's Editing

Custom Field

The User can create custom fields for all sections except the "Attendees" and "Proposed Agenda Topics" per specific Center and engagement type.

Field	Description	Validation
• Field Label*	• required • text area field • "Enter" will wrap-up text to the next line • max length: 250 symbols • Field Label should be unique within the section per Center and engagement type.	• Error: This field is required • Max length of 250 characters is allowed. • Error: Field with this label already exist.

<table>
<tr><td>Field Helper Text</td><td>optional
text area field
“Enter” will wrap-up text to the next line
max length: 500 symbols</td><td>Max length of 500 characters is allowed.</td></tr>
<tr><td>Include in Request Form</td><td>toggle
“Yes” by the default
If a field is toggled “No” for “Include in Request Form”, “(Disabled)” will appear after the field name on the main Briefing Request page.</td><td>-</td></tr>
<tr><td>Field Required</td><td>toggle
“No” by the default</td><td>-</td></tr>
<tr><td>Format*</td><td>Required
drop-down
Available drop-down options:
Text Field
Single-Selection Dropdown
Multiple Selection Dropdown</td><td></td></tr>
<tr><td>Label*
*only for Single Selection Dropdown and Multiple Selection Dropdown</td><td>optional
text area field
“Enter” will wrap-up text to the next line
max length: 250 symbols</td><td>Max length of 250 characters is allowed.</td></tr>
</table>

The User can edit anything except field format for the already created custom fields.

Hub / CRM briefing request

After Briefing Request structure will be set up, users can submit a Briefing Request based on the structure from the Hub.

First step will be to choose Center and Engagement type values. Based on these fields' value other fields will be revealed.

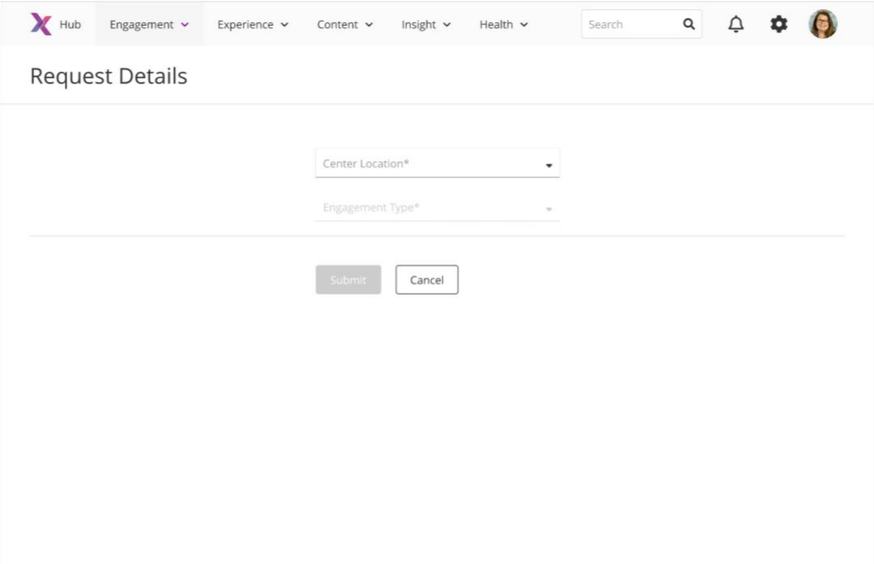


Figure 4. Request Details - Create form

Section and fields will be shown in the exact same order as created on the Programs - Briefing Request Form based on the center and engagement type.

No matter from which tab in SF (Account or Opportunity) the user will open briefing request, all sections and fields will be shown based on the Hub settings.

If the field is included in the request form - it will be shown. The field will be optional or required based on the "Field Required" setting.

If section's "**Include in Request Form" = Off**, then all fields of this section will be not shown as well.

If section's "**Include in Request Form" = On** but all fields' "**Include in Request Form" = Off**, then section will be not shown.

There are 4 new standard fields that were added on the Request Form.

Fields	Description
• Account Segment	• drop-down • single selection only. • sorted in the alphabetical order

• Account Region	• drop-down • single selection only. • sorted in the alphabetical order
• Account Territory	• drop-down • single selection only. • sorted in the alphabetical order • ⚠ Note: Account Territory field will be disabled until Account Region field is not selected. If Account Region is disabled on the form, Account Territory will not be shown as well.
• Secondary Time Zone	• drop-down • single selection only. • sorted as on the Briefing Details - Facilitation page - Additional Time Zone field.

After converting request to the briefing, the engagement type will be pre-populated from the request.

If Secondary Time Zone was filled in the briefing request, this data will be added on the Facilitation tab.

- Show Additional Time Zone = On
- Additional Time Zone = Additional Time Zone from the request

Engagement type deletion

If the User Deletes any Engagement Type, then the respective Request Form will be deleted too.

For the already created requests, this deleted engagement type will be still shown on the Request Details (Overview) page.

If the user will open the Request Details (Edit) page, the request will be re-assigned to the standard engagement name with the same type as was deleted.

All fields will be shown based on the settings for the standard engagement name.

For example, the request was created for the custom Partner Hybrid Innovations engagement name with the type “Partner”. Partner Hybrid Innovations was deleted. Now, this request will be re-assigned to the standard Partner Briefing engagement name with the type “Partner”.

Email Request Confirmation

Now, the view of the Request Confirmation Emails will depend on the settings of the Request Form in the Hub. The user will see the exact same order of sections and fields.

NYC Signet Experience Center - Briefing Request

Your engagement request was successfully submitted. It will be reviewed, and you will be contacted soon regarding next steps.
https://signet.hub.nexuscenter.io/platform/engagement/requests/197

Center Location: Silicon Valley Signet Experience Center
Engagement Type: Customer Engagement

Engagement Info
Briefing Request Date: 02/24/2021
Alternate Briefing Request Date: 03/12/2021
Briefing Start Time: 9:00 A.M.
Briefing End Time: 4:30 P.M.
Briefing Format: In-Person
Estimated # of Attendees: 12
Briefing Objective and Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec lacinia accumsan libero, eu luctus nunc egestas sed. Praesent diam lectus, egestas et fringilla sit amet, tincidunt ac augue.
Requester Name: John Doe
Requester Email: johndoe@email.com

Opportunity Details
Opportunity Name: Cloudera CS Upgrade
Opportunity ID: 0065Y00001UZDgVQAX
Opportunity Amount: $1,000,000
Opportunity Probability: 75%
Estimated Opportunity Close Date: 02/01/2021
Opportunity Description: <text from sdfc>

Account Details
Account Name: Cloudera
Account CRM ID: 0015Y00002alZ2IQAU
Account Segment: Large Enterprise
Account Region: AMER
Account Territory: West Coast
Account Industry: Technology
Account Revenue: $10,000,000
Account Description: <test from sfdc>

Attendees
<First Name> <Last Name>, <Company Name>
<First Name> <Last Name>, <Company Name>
<First Name> <Last Name>, <Company Name>

Figure 5. Email Request Confirmation

External users will not have this functionality available.