

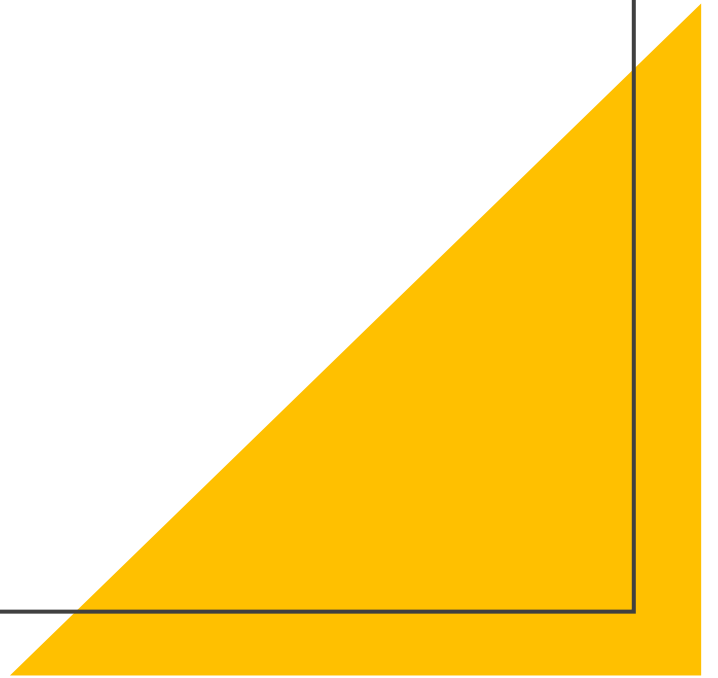
 nexus



Customer Portal Setup & Configuration

- Customer Portal
- Virtual Warmer
- Ongoing maintenance

Customer Portal

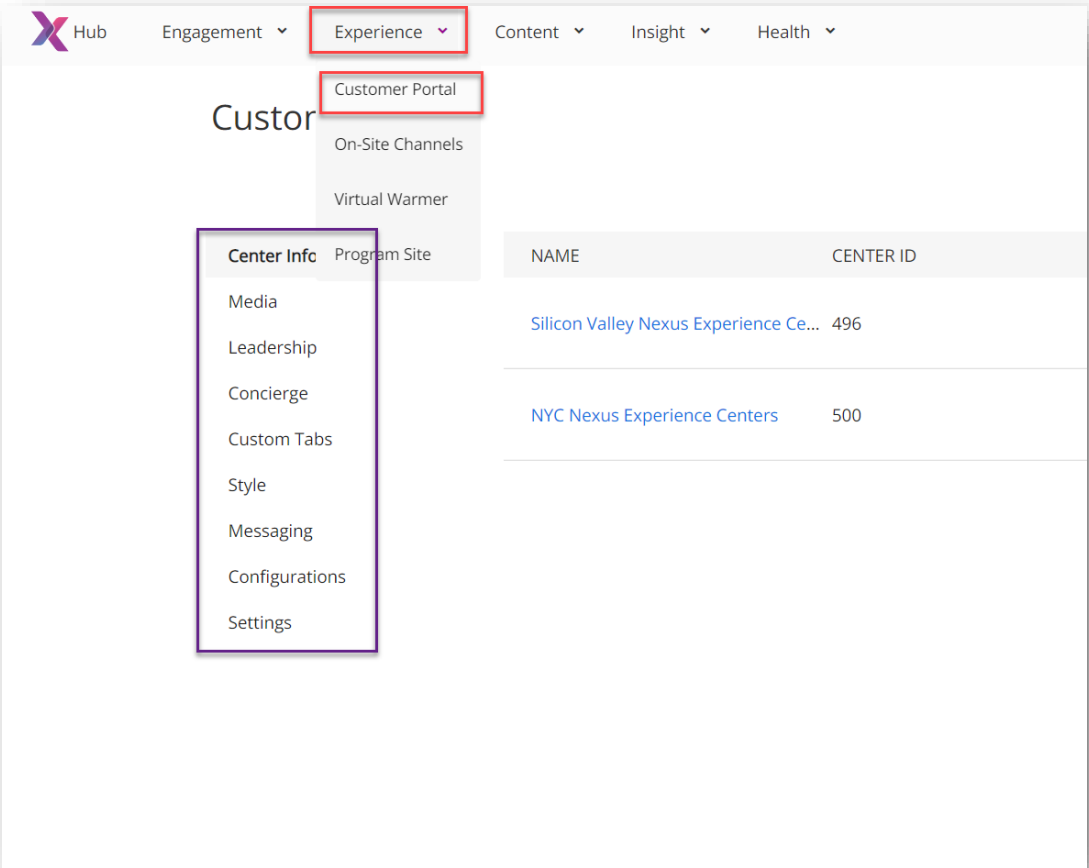


Customer Portal Personalization



Create and manage how attendees experience the Customer Portal

Navigation Hint: **EXPERIENCE → CUSTOMER PORTAL**

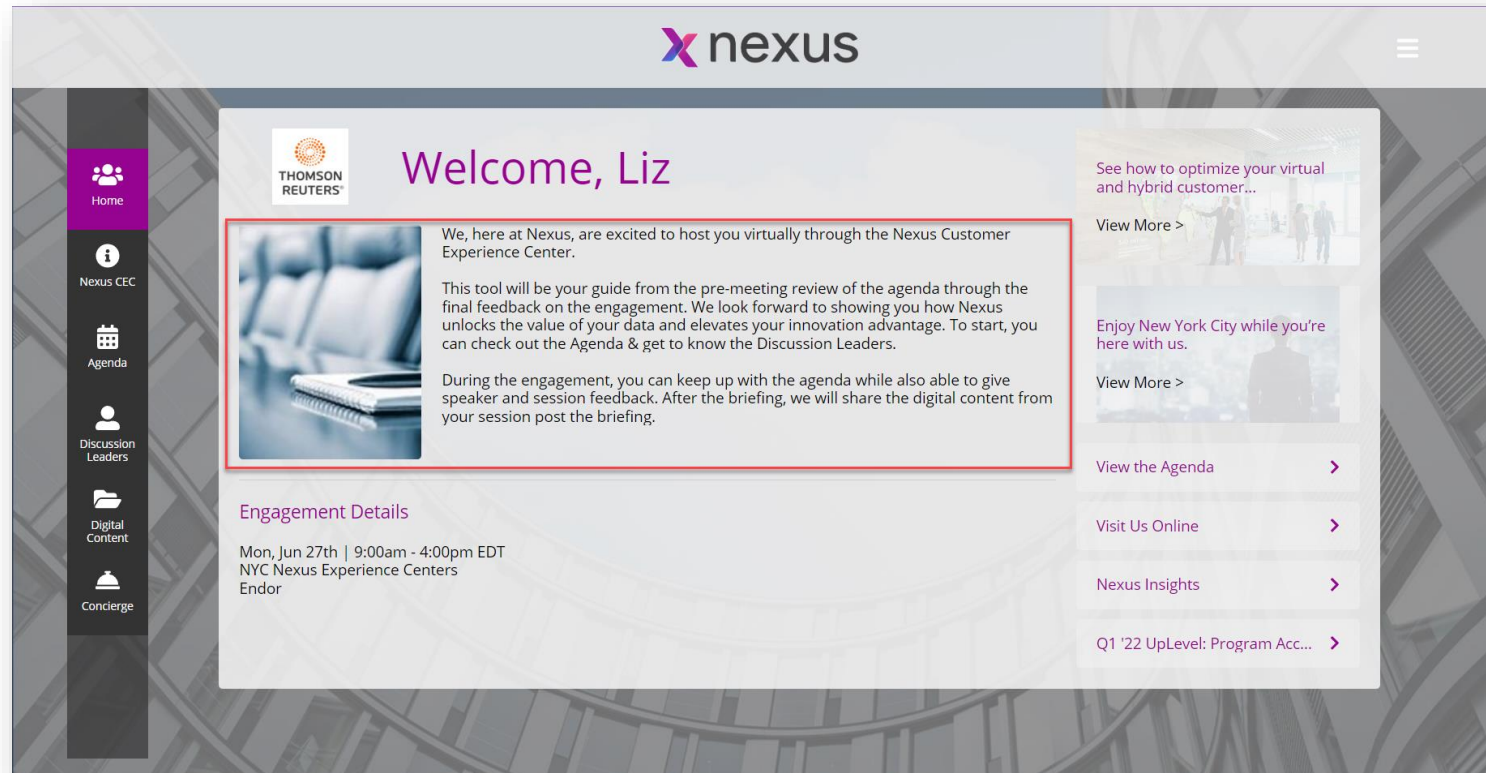


Key Areas	Functionality
Center Tab	Let's talk about YOU!
Media	Persistent Media Library, Industry Trigger
Leadership	Manage leadership details or a Quick Link?
Concierge	Manage concierge tab and content
Custom Tabs	Create and manage custom tabs
Styles	Set the style for the CP (Customer Portal)
Messaging	Creating and managing salutations for the CP
Configurations	Managing CP behavior at the default level Order of the tabs and behavior
Settings	Center available settings for CP behavior

- Messaging + Imagery
- Center Info / Leadership Mgmt.
- Media library + Briefing Content
- Concierge
- Custom Tabs
- Style/Configurations
- Settings

Messaging + Imagery

The Home Tab is the first tab seen so high impact communication is critical



Salutations at the phases

Image + Messaging – Pre, Day of, Post
→ at the briefing type level!

Content option

- ✓ PNG, JPG
- ✓ 450 characters
- ✓ Single message or a carousel effect

Messaging: Maintenance

Maintenance navigation hint: **EXPERIENCE → CUSTOMER PORTAL → MESSAGING**

Customer Portal

Center Info

Media

Leadership

Concierge

Custom Tabs

Style

Messaging

Configurations

Settings

Pre-Briefing Greeting Messages [New Message](#)

ORDER	MESSAGE NAME	ENGAGEMENT TYPES
= 1	Pre NYC	Test Briefing, Customer Briefing, Partner Briefing, Internal Briefing

Day-of Briefing Greeting Messages [New Message](#)

ORDER	MESSAGE NAME	ENGAGEMENT TYPES
= 1	DayOf	Test Briefing, Customer Briefing, Partner Briefing, Internal Briefing

Post-Briefing Greeting Messages [New Message](#)

ORDER	MESSAGE NAME	ENGAGEMENT TYPES
= 1	Post	Test Briefing, Customer Briefing, Partner Briefing, Internal Briefing

Thank You Messages

MESSAGE NAME

[Thank You Message](#)


Set messaging at the engagement type level at each phase

Cool feature: You can have a carousel of messaging

Message Name *


Pre NYC

Message Image

 [Pre Salutation Test 1.jpg](#) [×](#)

Optimal media size is 440px wide by 500px tall.

Message Body Text *

B I U 

We're excited to host you in a personalized customer engagement designed to address business goals and topics that are most important to you. In a session tailored specifically to your business, we'll explore solutions for advancing your goals and overcoming your biggest challenges.

We're passionate about delivering exceptional customer experiences and helping you do the same for your customers!

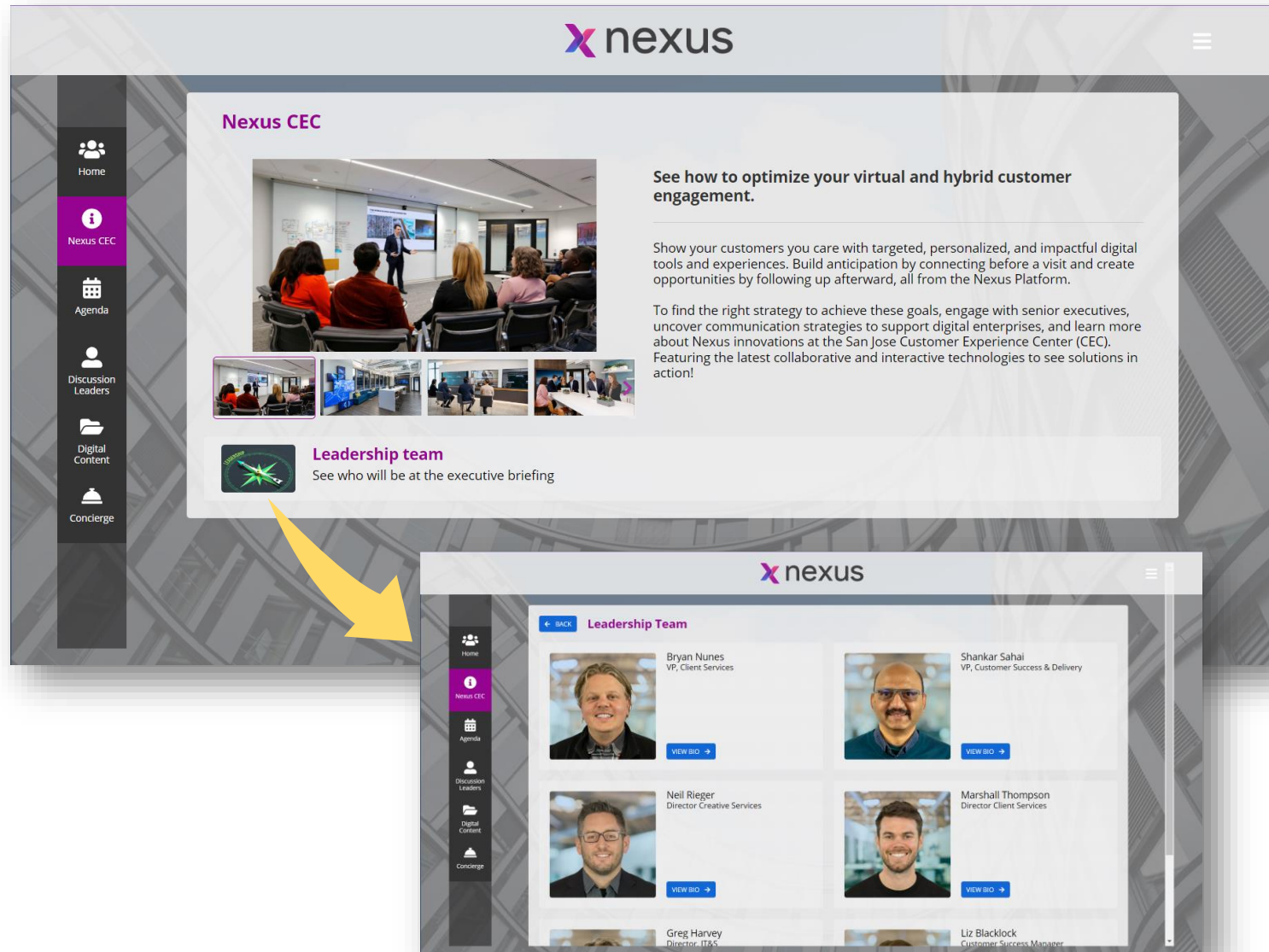
Engagement Type *

Test Briefing, Internal Briefing, Customer Briefing, P... ▼

[Save](#) [Cancel](#) [Delete](#)

- Image size recos: 440X500
- Up to 500 characters including hyperlinks
- Create and assign for different engagement types

Center Info & Leadership Mgmt.



Center Info

Image/video + Text

Content option

- ✓ Content Type: PNG, JPG, MP4, GIF
- ✓ Header text: 250 characters
- ✓ Body Text: 1000 characters

This can also be managed via a link to your company leadership site

Leadership Team

Image/video + Text

Content option

- ✓ PNG, JPG
- ✓ Name
- ✓ Title
- ✓ Bio (2000 characters)

Center Info & Leadership Maintenance



Maintenance navigation hint: **EXPERIENCE** → **CUSTOMER PORTAL** → **CENTER** → **CENTERNAME**

Center *

NYC Nexus Experience Centers

Center Info Short Description *

See how to optimize your virtual and hybrid customer eng

Center Info Overview *

B I U

Show your customers you care with targeted, personalized, and impactful digital tools and experiences. Build anticipation by connecting before a visit and create opportunities by following up afterward, all from the Nexus Platform.

To find the right strategy to achieve these goals, engage with senior executives, uncover communication strategies to support digital enterprises, and learn more about Nexus innovations at the San Jose Customer Experience Center (CEC). Featuring the latest collaborative and interactive technologies to see solutions in action!

Website

<https://www.nexuscenter.io>

Center Info Media *

NY image 1.png

✕

NY image 4.png

✕

NY image 3.png

✕

NY image 5.png

✕

Upload

Center Info Thumbnail *

center-info-image.png

✕

Optimal media size is 180px wide by 180px tall.

Center Brochure

Upload

Supported media type is PDF

Save

Cancel

Nexus CEC

See how to optimize your virtual and hybrid customer engagement.

Show your customers you care with targeted, personalized, and impactful digital tools and experiences. Build anticipation by connecting before a visit and create opportunities by following up afterward, all from the Nexus Platform.

To find the right strategy to achieve these goals, engage with senior executives, uncover communication strategies to support digital enterprises, and learn more about Nexus innovations at the San Jose Customer Experience Center (CEC). Featuring the latest collaborative and interactive technologies to see solutions in action!

Updates to text, images, thumbnails including URL or hyperlinks are easy to manage

Center Info & Leadership Maintenance



Maintenance navigation hint: **EXPERIENCE** → **CUSTOMER PORTAL** → **LEADERSHIP**

Option 1 – Managed within Nexus Hub

Leadership First Name *

Neil

Leadership Last Name *

Rieger

Leadership Photo

Headshot Neil LinkedIn.jpg

Optimal media size is 400px wide by 400px tall.

Leadership Title *

Director Creative Services

Leadership Bio

B I U

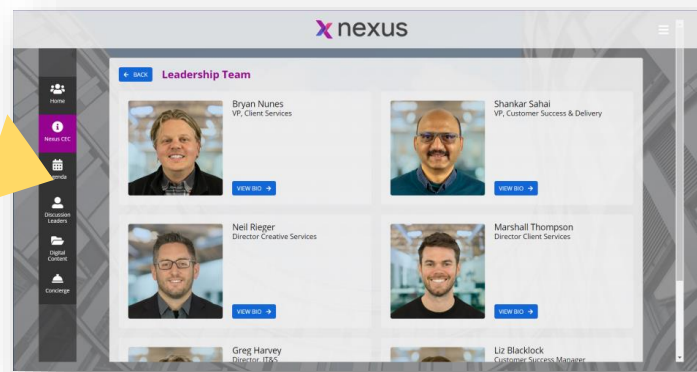
Neil leads our experience strategy and content design team, working with clients on turning their objectives into a holistic experience solution and finalizing all content design creation and production. Neil's experience in the design industry has spanned across innovation strategy, user experience, digital media design, graphic design and branding. From working across digital agencies, a telecom corporation, and smaller design firms, Neil brings a wide array of experience across digital and web design, application strategy and design, user testing and research, retail environmental experience, mobile centric experiences, sales and care systems, and marketing and branding. Neil has worked with various globally enterprise brands across retail, telecom, airline, food & beverage, sports & entertainment, and financial industries.

Center Access *

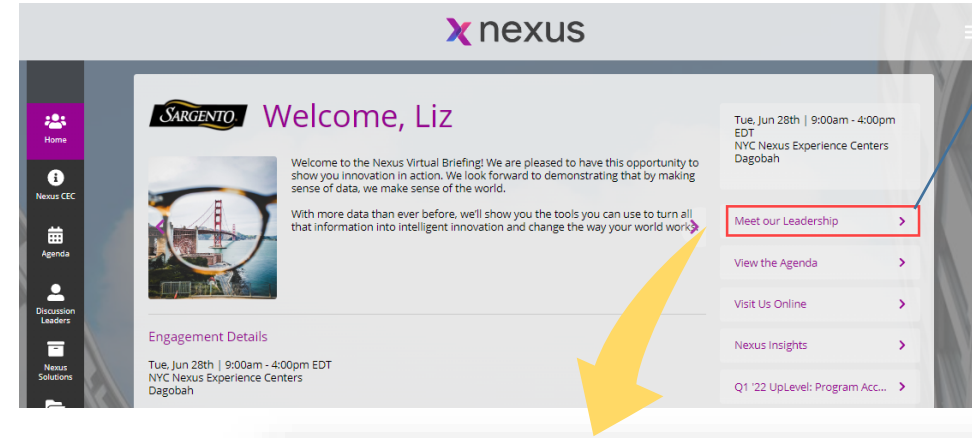
All

Save Cancel Delete

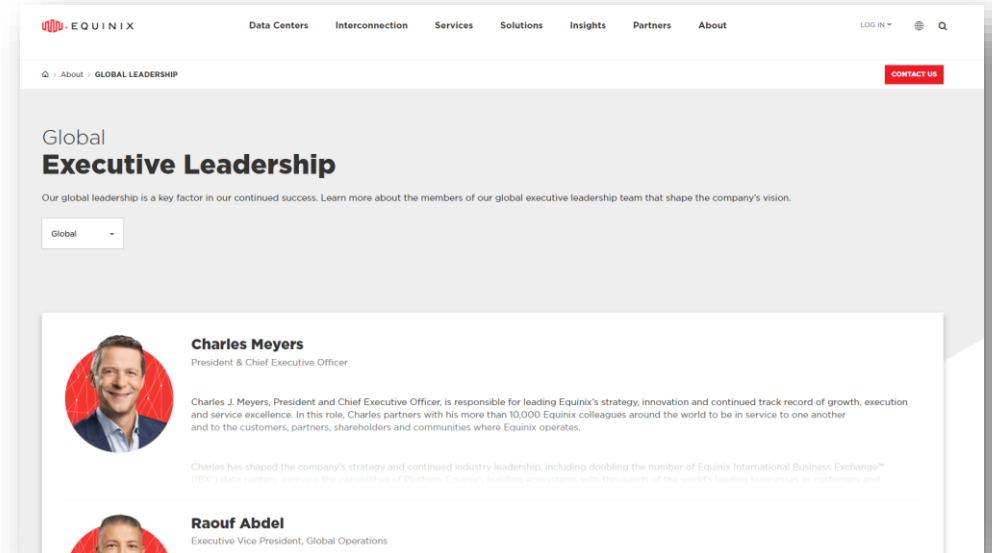
Manage leadership name, images, title and bio to display in the CENTER tab



Option 2 – QuickLinks leading to URL

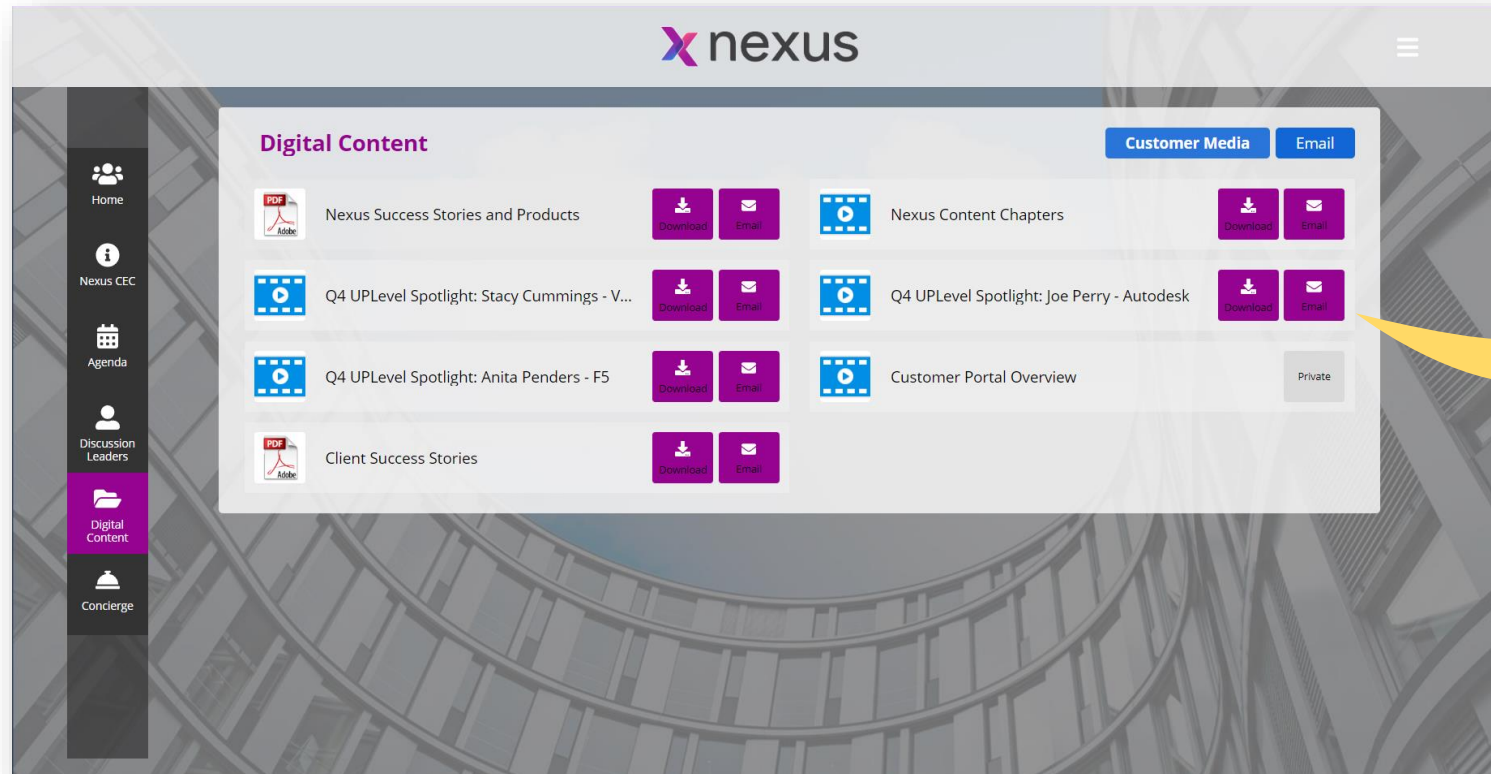


Quick Link on Home Page Content managed by marketing team



Media Library + Briefing Content

There are 2 types of content shared via the Customer Portal



Persistent Library of content triggered by INDUSTRY

Load content through the Nexus Hub and share via the portal.

Customer Videos/Stories
Gartner Content
Solution Review

Content option

✓ PNG, JPG, MP4, GIF (>150M)

Briefing Specific Content

Load content through the Nexus Hub and share via the portal.

Discussion Leader Content
Audio or video recordings

Content option

✓ PNG, JPG, MP4

Media Library + Briefing Content



Maintenance navigation hint: **CONTENT** → **MEDIA** → **ADD MEDIA**

Media Details

Media *

Upload

Supported media types include JPG, PNG, MP4, PDF.

Media Name *

Media Short Description

Private

No

Private media will be disabled from being downloaded or emailed in the Customer Portal.

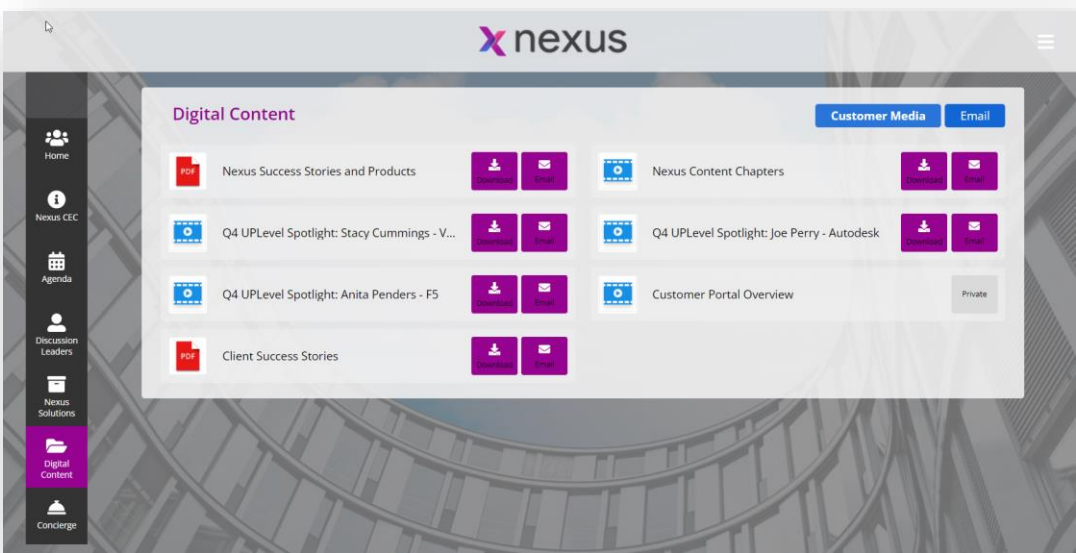
Industry *

Center *

Product

Save

Cancel



Industry & Site flags drive content visibility in the Portal



Media Library + Briefing Content



Navigation hint: **BRIEFING OVERVIEW** → **EXPERIENCES**

Customer Portal

Customer Portal Media

 Signet ABPM 2020 Spr... 

Upload

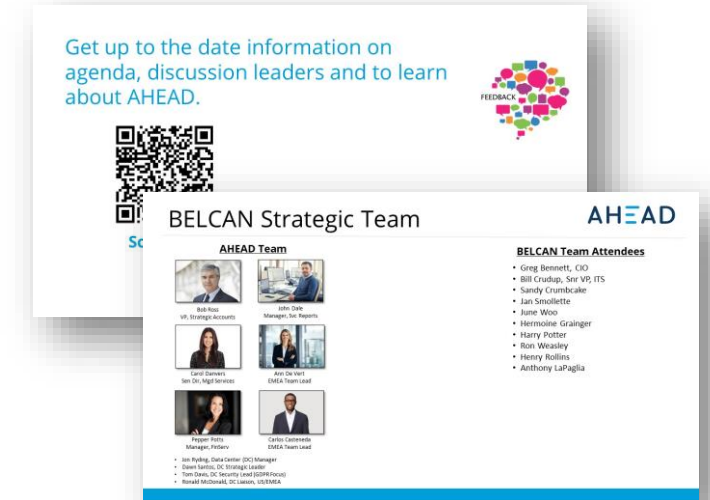
Supported media types include JPG, JPEG, PNG, MP4 and PDF

Add briefing specific Digital Content for the Customer Portal

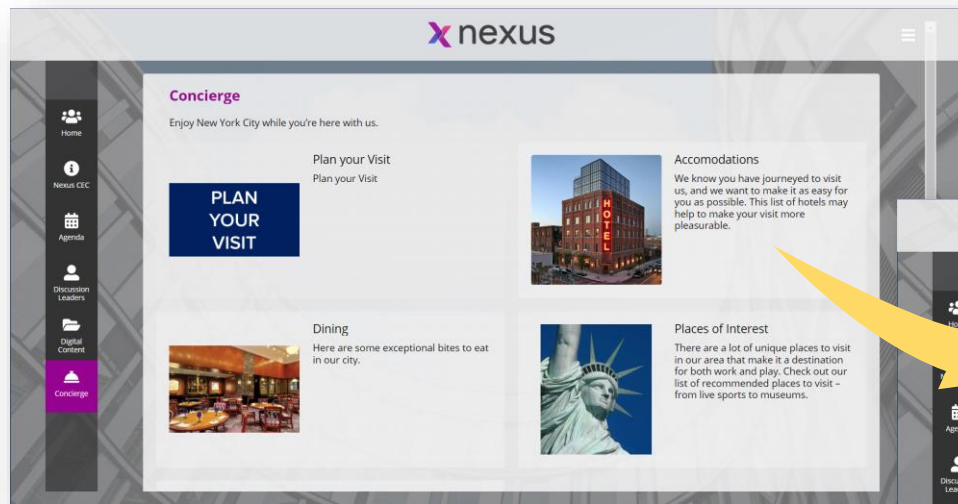
Post Briefing Content; Discussion Leader Content; Review docs, etc.

Key Benefits:

- Instantly visible in Customer Portal
- **Prioritized** above persistent media library



Concierge

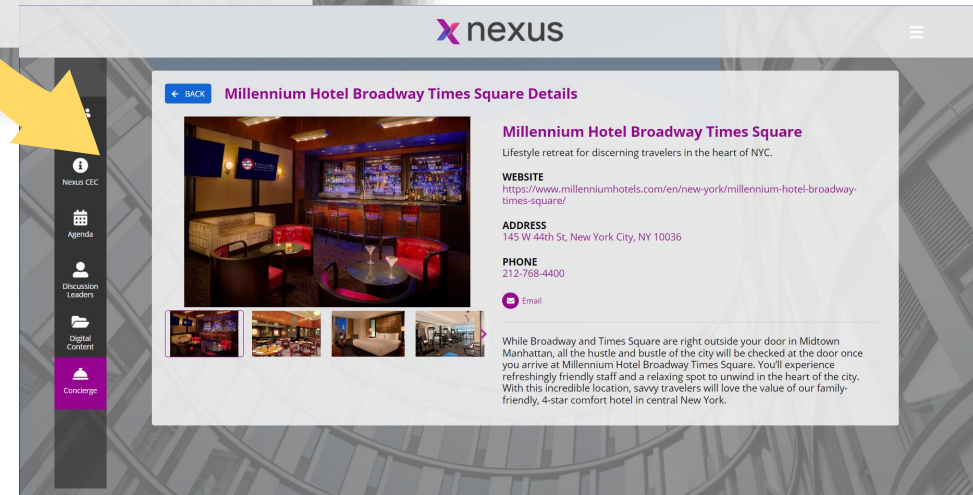
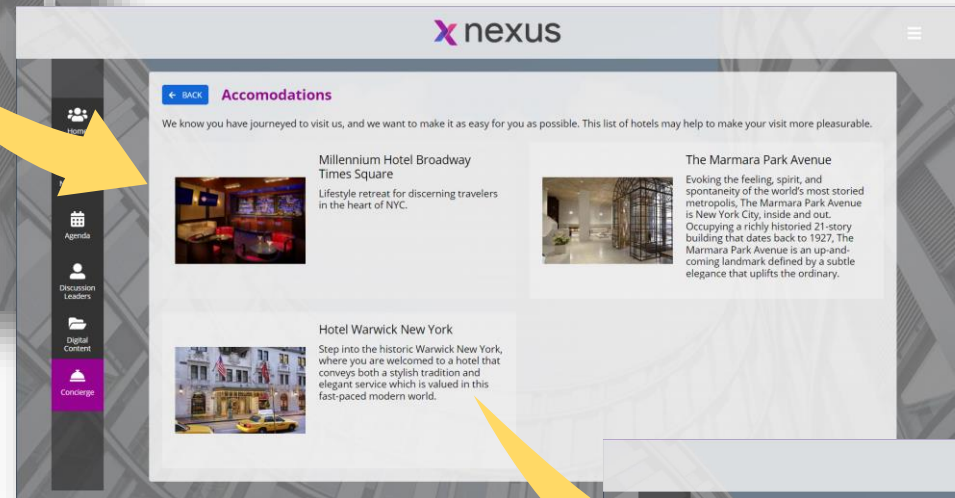


Nexus will complete the initial configuration and setup. Ongoing maintenance is bi-annual

CENTER SPECIFIC

Share **Concierge** recommendations through the Customer Portal

Create and manage the categories, text and places shared by **SITE**

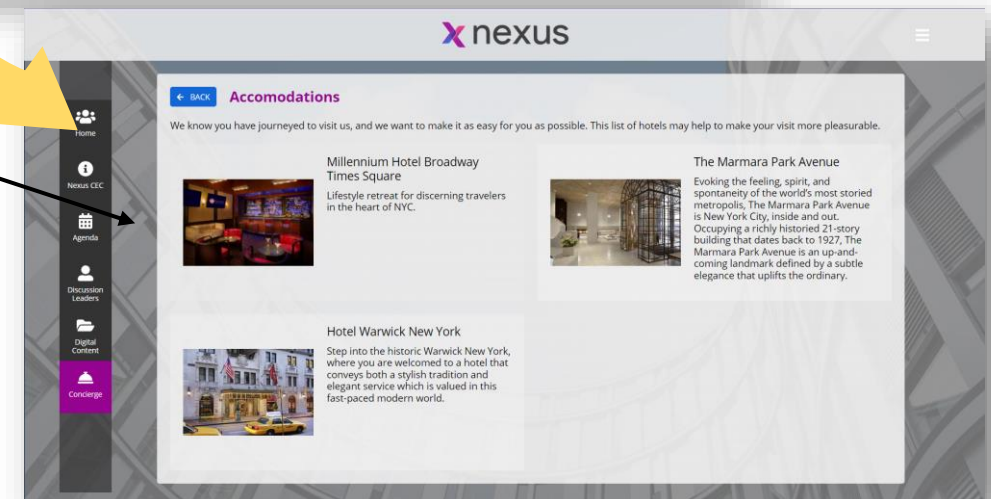


Concierge Maintenance

Maintenance navigation hint: **EXPERIENCE → CUSTOMER PORTAL → CONCIERGE → CENTERNAME**

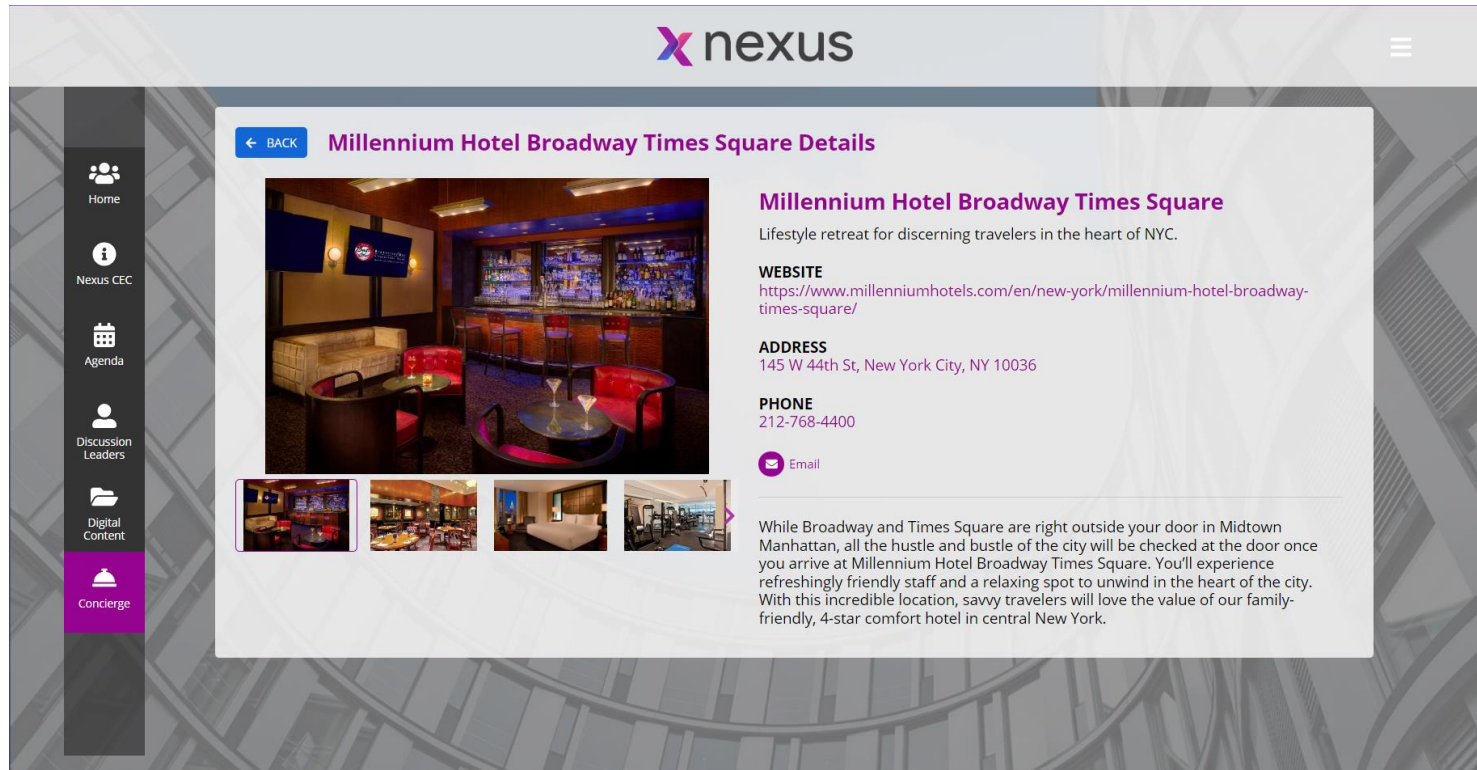
CATEGORY	DATE MODIFIED	ACTIONS
<div>Hotels ^</div>	06/23/2022	<div>Edit Description</div> <div>Add Category</div> <div>New Place</div>
<div>AC Marriott - San Jose</div>	06/23/2022	
<div>Hyatt Regency Santa Clara</div>	06/23/2022	
<div>San Jose Fairmont</div>	06/23/2022	
<div>The Westin San Jose</div>	06/23/2022	

- Nested Category structure allows for editing imagery and text at each level
 - Click to Edit
 - Click to Add



Concierge Maintenance

Maintenance navigation hint: **EXPERIENCE → CUSTOMER PORTAL → CONCIERGE → CENTERNAME**



Nested items allow you to communicate favored or recommended accommodations, places of interest, dining options, transportation, visiting the office details via the customer portal

Can be set at the SITE level
Tab visibility can be controlled at the site and briefing level with defaults set to accommodate the most usage

Custom Tabs – Customer Portal

Maintenance Navigation: CUSTOMER PORTAL → CUSTOM TAB



Key Benefits:

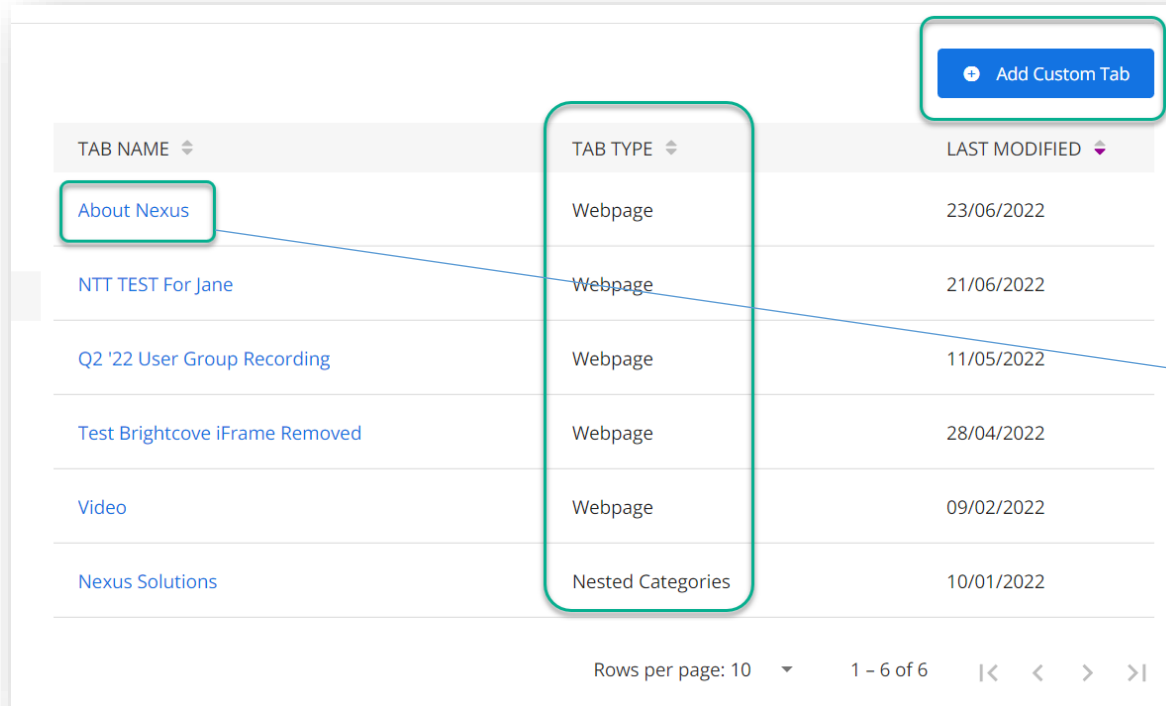
- Expose a URL within a custom tab
- Create a new NESTED tab experience, like a concierge tab

Direct clients to a specific experience site, demo site, etc.

Once setup, utilization can be setup as part of the default setup for engagements or available as a one-off tab to activate at the briefing elvel

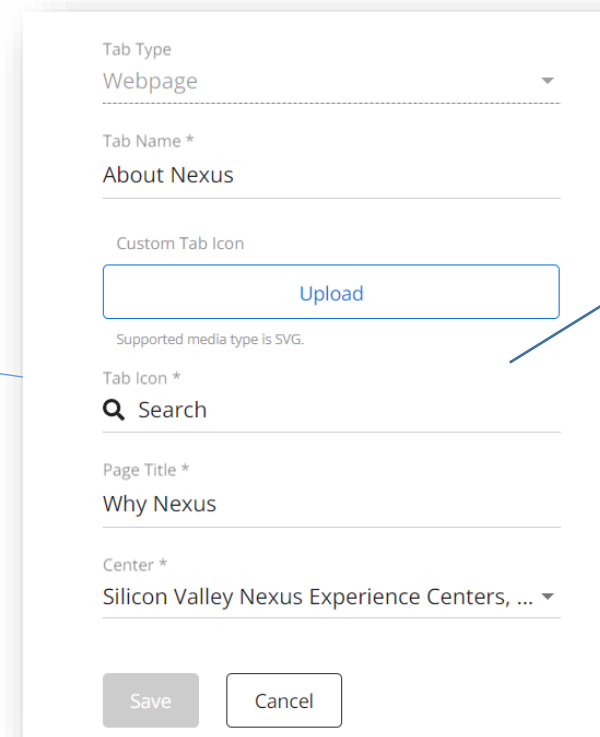
Custom Tab – URL tab Maintenance

Create and Manage custom tabs here!



TAB NAME ▾	TAB TYPE ▾	LAST MODIFIED ▾
About Nexus	Webpage	23/06/2022
NTT TEST For Jane	Webpage	21/06/2022
Q2 '22 User Group Recording	Webpage	11/05/2022
Test Brightcove iFrame Removed	Webpage	28/04/2022
Video	Webpage	09/02/2022
Nexus Solutions	Nested Categories	10/01/2022

Rows per page: 10 ▾ 1 – 6 of 6 |< < > >|



Tab Type
Webpage ▾

Tab Name *
About Nexus

Custom Tab Icon

Supported media type is SVG.

Tab Icon *
🔍 Search

Page Title *
Why Nexus

Center *
Silicon Valley Nexus Experience Centers, ... ▾

Assign the tab names,
page titles, what centers
it's available

Custom Tabs - NESTED



Create a custom tab with ***Nested Categories***

- ***Unlimited categories***
- ***Up to 3 levels deep***
- ***Products, Solutions, etc.***



Custom Tab – Nested Maintenance

Similar functionality to CONCIERGE TABS

Nexus Solutions

[Edit](#) | [Duplicate](#) | [Delete](#)

[+ Add Category](#)

CATEGORY ▾	LAST MODIFIED ▾	ACTIONS ▾
= Nexus Solutions	06/23/2022	New Sub-Page
= Customer Engagement	06/23/2022	
= Make a great first impression	06/23/2022	
= Virtual & Hybrid	06/23/2022	
= On-Site Experience	06/23/2022	

Manage Titles, Images
and text to review

Just CLICK to EDITE or
ADD to create new

Customer Portal – Style, Configurations



Customer Portal Style and Settings are managed at:
Experiences → Customer Portal → Style

Experiences → Customer Portal →
Configuration

Header Styles

Header Color *

Header Image: Optimal media size is 2048px wide by 144px tall

Header Opacity Percentage (%)

Logo Image: Optimal media size is 64px tall

Main Navigation Styles

Nav Background Color *

Nav Background Opacity Percentage (%)

Nav Tab Gradient Top Color *

Nav Tab Gradient Bottom Color *

Nav Icon Color *

Nav Text Color *

Nav Active Tab Gradient Top Color *

Nav Active Tab Gradient Bottom Color *

Nav Active Icon Color *

Nav Active Text Color *

Pod Styles

Pod Header Color *

Pod Header Text Color *

Primary Pod Background Gradient Top Color *

Primary Pod Background Gradient Bottom Color *

Primary Pod Background Opacity Percentage (%)

Secondary Pod Background Gradient Top Color *

Secondary Pod Background Gradient Bottom Color *

Secondary Pod Background Opacity Percentage (%)

Pod Text Color *

Center Info & Concierge Pod Text Color *

Center Info & Concierge Pod Overlay Color *

Center Info & Concierge Pod Overlay Opacity Percentage (%)

General Styles

Open Sans

Font *

Primary Brand Color *

Primary Button Text Color *

Body Text Color *

Secondary Button Color *

Secondary Button Text Color *

Hyperlink Color *

Sub-Header Text Color *

Bold

Sub-Header Text Weight *

Agenda Expand Button Color *

Agenda Expand Button Opacity Percentage (%)

Rating Pod Color *

Rating Pod Line Color *

Rating Text Color *

Line Color *

Background Color *

Background Image: Optimal media size is 500px wide by 360px tall.

Background Overlay Color *

Background Overlay Opacity Percentage (%)

Slideout Background Color *

Logo Screen Image: Optimal media size is 500px wide by 360px tall.

Configurations

Quick Links

Tab Names, Phases

Customer Portal – Settings



Customer Portal Style and Settings are managed at the Center Level

Experiences → Customer Portal → Settings

Layout Options: A or B

Navigation Positions: Bottom or Right

Show Home Visiting Company Logo: Toggle

Speaker Label: TEXT

Meeting Room: Toggle

Briefing Manager : Toggle

Allow Contact Briefing Manager: Toggle

Allow Contact Speakers: Toggle

A screenshot of the 'Customer Portal Settings' interface. At the top, it shows 'Center' with a dropdown menu set to 'Silicon Valley Nexus Experience Centers'. Below this is 'Customer Portal Layout' with a dropdown set to 'Layout A'. Next is 'Navigation Position *' with a dropdown set to 'Left'. A section titled 'Show Home Visiting Company Logo' has a toggle switch set to 'Yes'. Below that, 'Speaker Label *' is set to 'Discussion Leader'. A section titled 'Home Details Container Info to Display' contains two checked items: 'Meeting Room' and 'Briefing Manager'. At the bottom of this section, 'Allow Contact Briefing Manager Email Feature' has a toggle set to 'Yes', and 'Allow Contact Speaker Email Feature' has a toggle set to 'No'. At the very bottom are 'Save' and 'Cancel' buttons.

Center
Silicon Valley Nexus Experience Centers ▼

Customer Portal Layout
Layout A ▼

Navigation Position *
Left ▼

Show Home Visiting Company Logo
☒ Yes

Speaker Label *
Discussion Leader

Home Details Container Info to Display

☒ Meeting Room

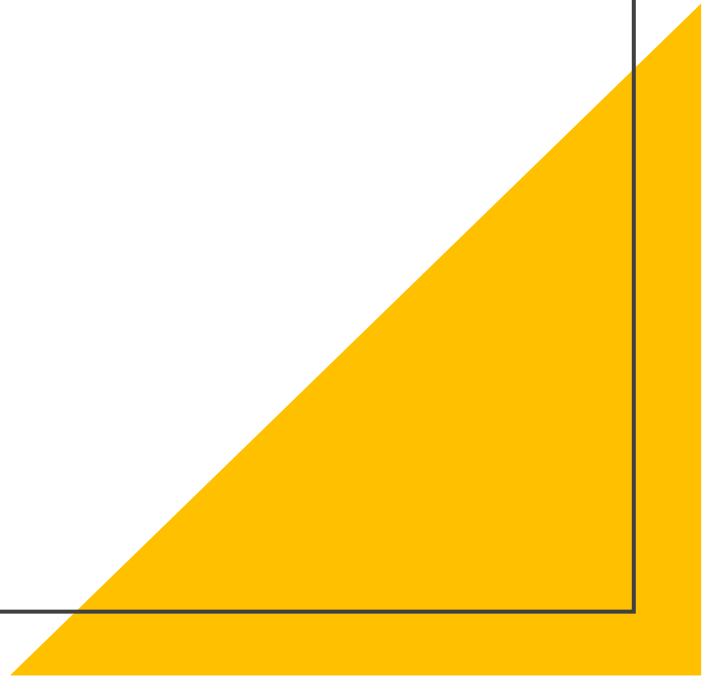
☒ Briefing Manager

Allow Contact Briefing Manager Email Feature
☒ Yes

Allow Contact Speaker Email Feature
☐ No

Save Cancel

Virtual Warmer



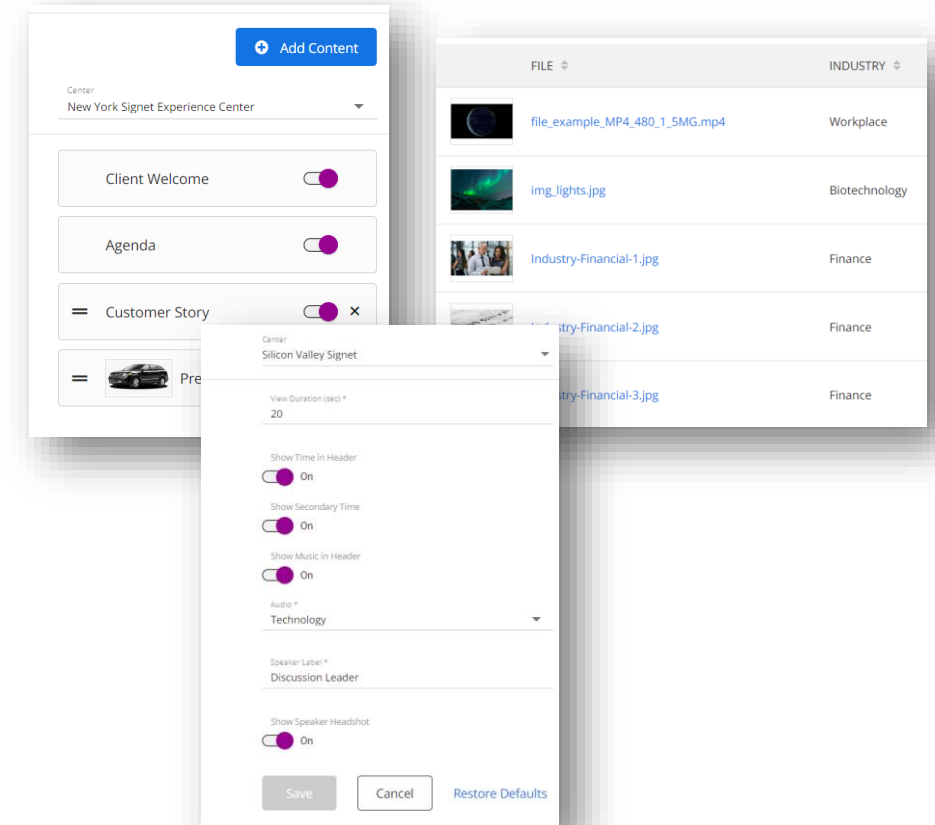
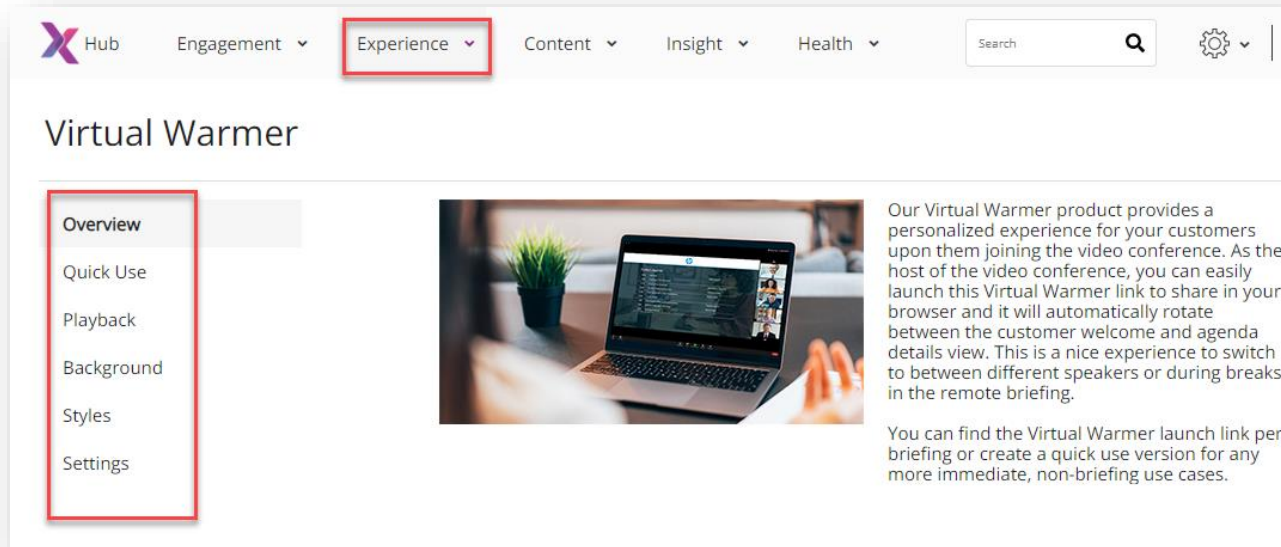
Virtual Warmer Maintenance



A virtual Room Warmer experience, automated from your briefing data!
Launch from the Briefing Overview screen!

Maintenance navigation hint: **EXPERIENCE → CUSTOMER PORTAL**

- Set your content strategy
- Set your industry-based background imagery
- Set the rotation schedule and header behavior



What questions do you have?

- Support: support@nexuscenter.io
- FAQ Site: <https://info.signet.tv/knowledge>