



Customer Portal Release Highlights

July 2021 (Native Scheduler)

Customer Portal Feature Summary



Features

- Agenda Templates
 - Setup & Applied
- Agenda: Associated speakers *(recommended first)*
- General Access Link
 - Existing, New
- Printables
 - Setup & Execution
- Virtual Welcome – **MUSIC!!!**

UI Updates

- New Calendar View: How do you view?

Agenda Template: Setup

Create a center level agenda template

ACCESS : Program COG → Programs → Agenda Templates

Current Setup

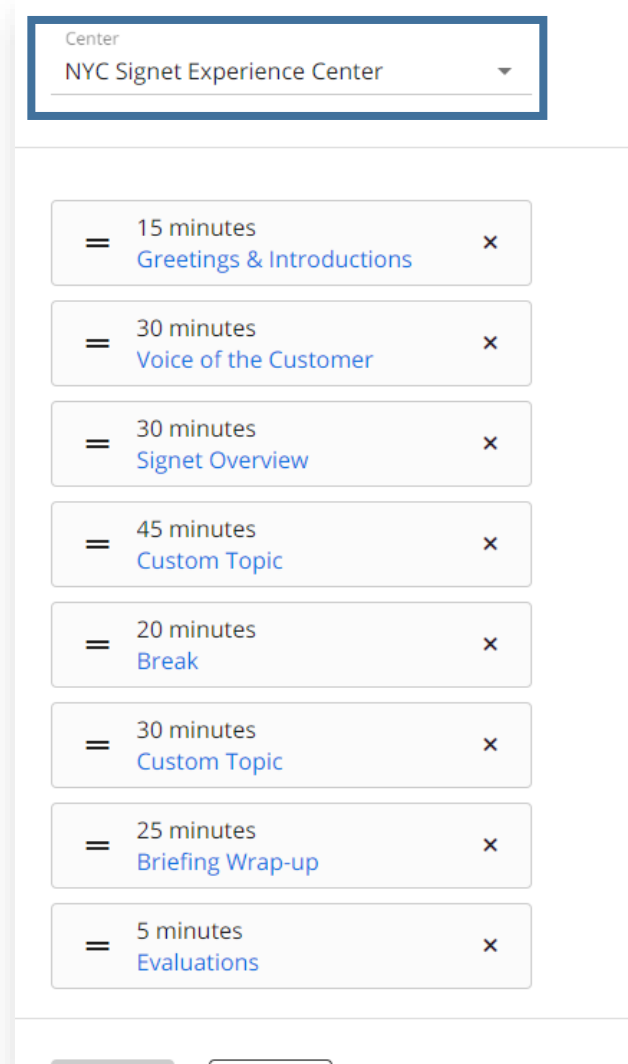
- Set standard **Topics**
- Set standard **durations**
- Set standard **briefing flow**

Set at

- Center
- Internal/External
- Single/Multi-Day

Applied

- New Briefings



The screenshot shows the 'Agenda Template: Setup' interface. At the top, there is a dropdown menu labeled 'Center' with 'NYC Signet Experience Center' selected. Below this, there is a list of agenda items, each with a duration, a topic name, and a delete icon (X). The items are:

Duration	Topic	Action
15 minutes	Greetings & Introductions	X
30 minutes	Voice of the Customer	X
30 minutes	Signet Overview	X
45 minutes	Custom Topic	X
20 minutes	Break	X
30 minutes	Custom Topic	X
25 minutes	Briefing Wrap-up	X
5 minutes	Evaluations	X

Benefits

- Consistent naming
- Consistent duration
- Optimize Scheduling

Agenda Template: Applied

Create a new briefing → template is applied

Click Topic Title to

- Edit Topic name, description
- Edit Speaker(s)
- Edit duration
- Set Eval Flag

Click Add Agenda Item

- Add new agenda topics

Click X to delete

- New Briefings

Briefing Details

Overview

Setup

Opportunity

Agenda

Attendees

Facilitation

Experiences

Evaluations

Thu, Sep 30, 7:00am - 2:00pm

7:00am - 7:15am (15 minutes)

Greetings & Introductions

7:15am - 7:45am (30 minutes)

Voice of the Customer

7:45am - 8:15am (30 minutes)

Signet Overview

8:15am - 9:00am (45 minutes)

Custom Topic

9:00am - 9:20am (20 minutes)

Break

9:20am - 9:50am (30 minutes)

Custom Topic

9:50am - 10:15am (25 minutes)

Briefing Wrap-up

10:15am - 10:20am (5 minutes)

Evaluations

Add Agenda Item

Details

Start time *

7:00am

Is this topic in a different meeting room?

☐ No

Topic *

Greetings & Introductions

Topic Name Override

Greetings & Introductions

Topic Description Override

B I U

Duration *

15 min

Speaker



Liz Blacklock
Customer Success Manager

Show Speaker

☒ Yes

This will display the speaker in the CE App and Virtual Welcome.

Include Speaker in Evaluation

☒ Yes

This will display the speaker in the feedback section.

Add Additional Speaker

Save

Cancel

Delete

Agenda: Associated Speakers



ACCESS : ENGAGEMENT → SPEAKER

Functionality

Associate speakers to Topics and the platform will recommend associated speakers at the top of the list

Topic Name *

Signet Overview

Topic Category *

Signet Solutions

External Description

B I U

Internal Description

B I U


Centers *


NYC Signet Experience Center

Default Duration *

30 min

Speakers

 Marshall Thompson
Director, Client Solutions

 Alex Maniuk

Start time *

10:00am

Is this topic in a different meeting room?

☐ No

Topic *

Signet Overview

Topic Name Override

Signet Overview

Topic Description Override

B I U

Duration *

15 min


Save


Cancel

Delete


Speaker

Associated Speakers

 Marshall Thompson
Director, Client Solutions

 Alex Maniuk
Director, Engineering

Other Speakers

 Elena Gladkova

General Access: Already registered

The CenterSuite Platform now offered General Access URL (or QR codes)


ACCESS : BRIEFING OVERVIEW

Get General Access Link (same access point)

- Copy Shareable Link
- View QR Code (download or copy)

Get General Access Link

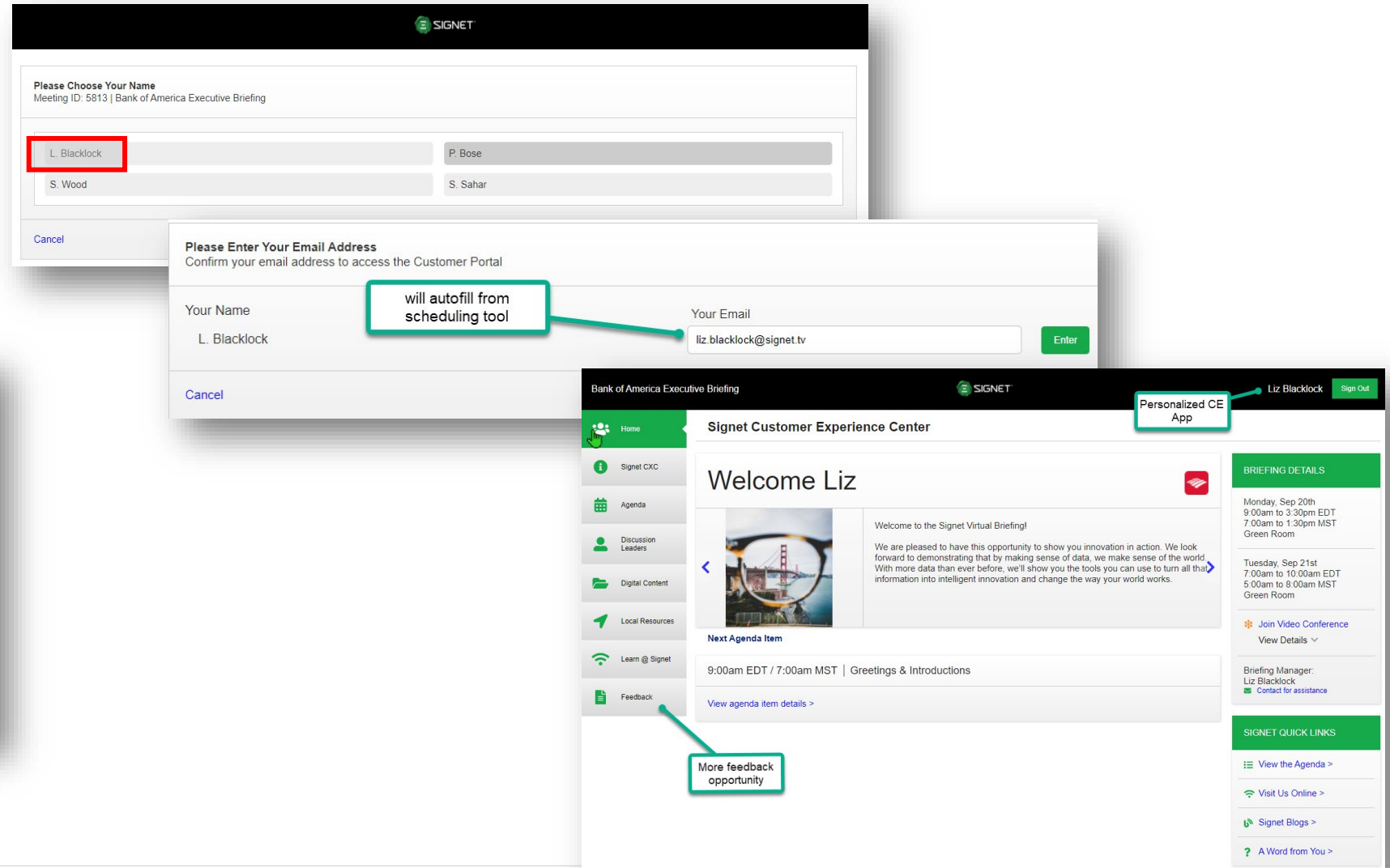
Copy Sharable Link  | View QR Code 

Send Meeting Invite 

Share CE App Access 

Print Agenda 

Print Attendees Seat Tents 



The screenshots illustrate the user journey for a registered user accessing the Signet Customer Experience Center. The first screen shows a selection of names, with 'L. Blacklock' highlighted. The second screen shows the email confirmation step, where the email 'liz.blacklock@signet.tv' is autofilled from the scheduling tool. The third screen shows the main dashboard, which includes a welcome message, a personalized CE app link, and a list of agenda items. A feedback link is also visible in the bottom left corner.

Please Choose Your Name
Meeting ID: 5813 | Bank of America Executive Briefing

L. Blacklock | P. Bose
S. Wood | S. Sahar

Please Enter Your Email Address
Confirm your email address to access the Customer Portal

Your Name: L. Blacklock
Your Email: liz.blacklock@signet.tv

Bank of America Executive Briefing
SIGNET

Home | Signet CXC | Agenda | Discussion Leaders | Digital Content | Local Resources | Learn @ Signet | Feedback

Signet Customer Experience Center
Welcome Liz

Next Agenda Item
9:00am EDT / 7:00am MST | Greetings & Introductions

BRIEFING DETAILS
Monday, Sep 20th
9:00am to 3:30pm EDT
7:00am to 1:30pm MST
Green Room

SIGNET QUICK LINKS
View the Agenda >
Visit Us Online >
Signet Blogs >
A Word from You >

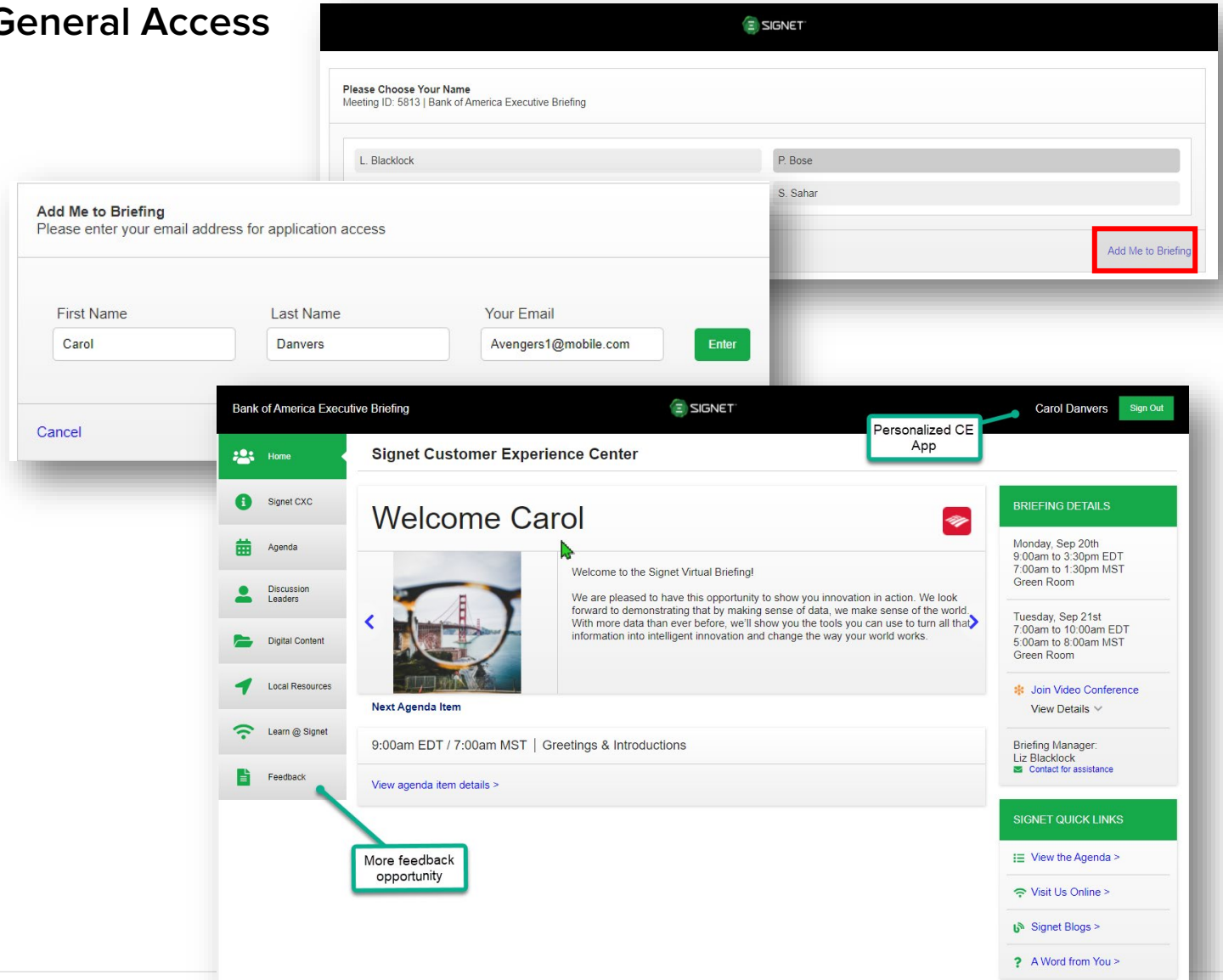
General Access: New Attendee

The CenterSuite Platform now offered General Access URL (or QR codes)

ACCESS: ADD NEW USER

- New User have URL or QR code
 - Clicks Add me to Briefing
 - Adds First, Last, Email
 - CE App opens immediately
- BM notified of user and can revoke user access

Someone new attending?



The image displays two screenshots of the SIGNET interface. The top screenshot shows the 'Add Me to Briefing' modal, which prompts the user to enter their email address for application access. Below this, there are input fields for First Name (Carol), Last Name (Danvers), and Your Email (Avengers1@mobile.com), along with an 'Enter' button. The bottom screenshot shows the 'Signet Customer Experience Center' dashboard, which includes a 'Welcome Carol' message, a 'Next Agenda Item' section, and a 'BRIEFING DETAILS' sidebar. A 'Personalized CE App' button is highlighted in the top right corner, and a 'More feedback opportunity' button is highlighted in the bottom left corner.

Printables: Setup

Agenda

ACCESS : Briefing Overview → Print Agenda & Print Attendees Seat Tents

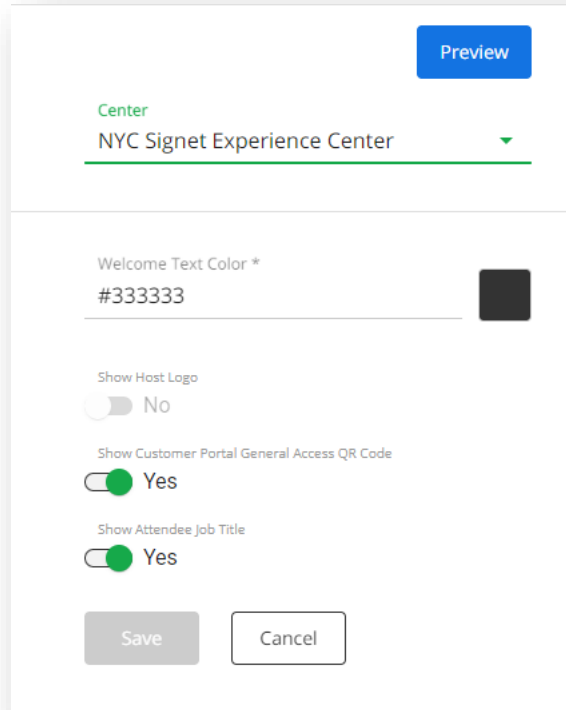
Settings done at the center level

Table Tents

- Show QR Code
- Job Title

Agenda

- Show QR Code
- Client Logo
- Salutation Message
- Show Agenda Topic Name in all caps
- Show agenda descriptions
- Show Speakers
- Show Speaker Title



Center
NYC Signet Experience Center

Preview

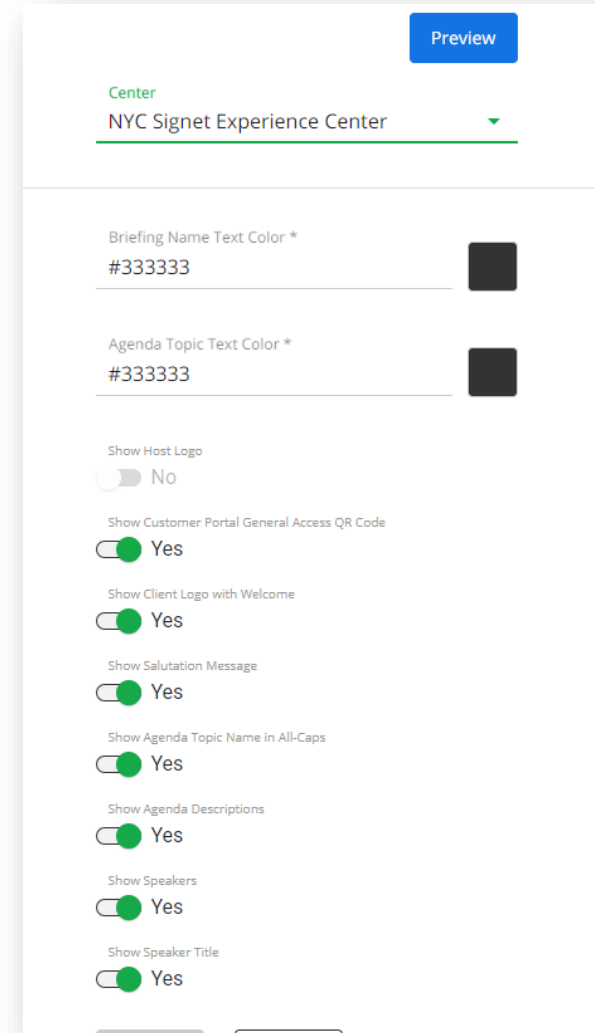
Welcome Text Color *
#333333

Show Host Logo
☐ No

Show Customer Portal General Access QR Code
☒ Yes

Show Attendee Job Title
☒ Yes

Save Cancel



Center
NYC Signet Experience Center

Preview

Briefing Name Text Color *
#333333

Agenda Topic Text Color *
#333333

Show Host Logo
☐ No

Show Customer Portal General Access QR Code
☒ Yes

Show Client Logo with Welcome
☒ Yes

Show Salutation Message
☒ Yes

Show Agenda Topic Name in All-Caps
☒ Yes

Show Agenda Descriptions
☒ Yes

Show Speakers
☒ Yes

Show Speaker Title
☒ Yes

Printables: Execution



Agenda and Table Tents

ACCESS : Briefing Overview → Print Agenda & Print Attendees Seat Tents

Briefing Details

Overview

Setup

Opportunity


Agenda

Attendees

Facilitation

Experiences

Evaluations

 **FedEx Executive Briefing**
FedEx

Customer Briefing | Virtual
NYC Signet Experience Center
Briefing Manager: Liz Blacklock
Tue, Sep 21, 2021 | 9:00am - 4:00pm EDT
Virtual

Briefing Status: Active
ID: 5807 | PIN: 4ocPy2Gq

Internal Attendees: 2

Agenda Topics: 3

Speakers: 0

External Attendees: 3

[Launch Virtual Welcome](#)

[Your CE App Access Link](#)

Get General Access Link

[Copy Sharable Link](#) | [View QR Code](#)

[Send Meeting Invite](#)

[Share CE App Access](#)

[Print Agenda](#)

[Print Attendees Seat Tents](#)

Virtual Welcome: Music



Add music to your Virtual Experience

ACCESS : EXPERIENCES → VIRTUAL WELCOME → SETTINGS

Current Musical Options (by Center)

- Clarion Full
- Clarion
- Decide
- Freedom Run
- Fresh Commerce
- Technology
- Upstart

Center
NYC Signet Experience Center

View Duration (sec) *
15

Show Time in Header
☒ On

Show Secondary Time
☒ On

Show Music in Header
☐ Off

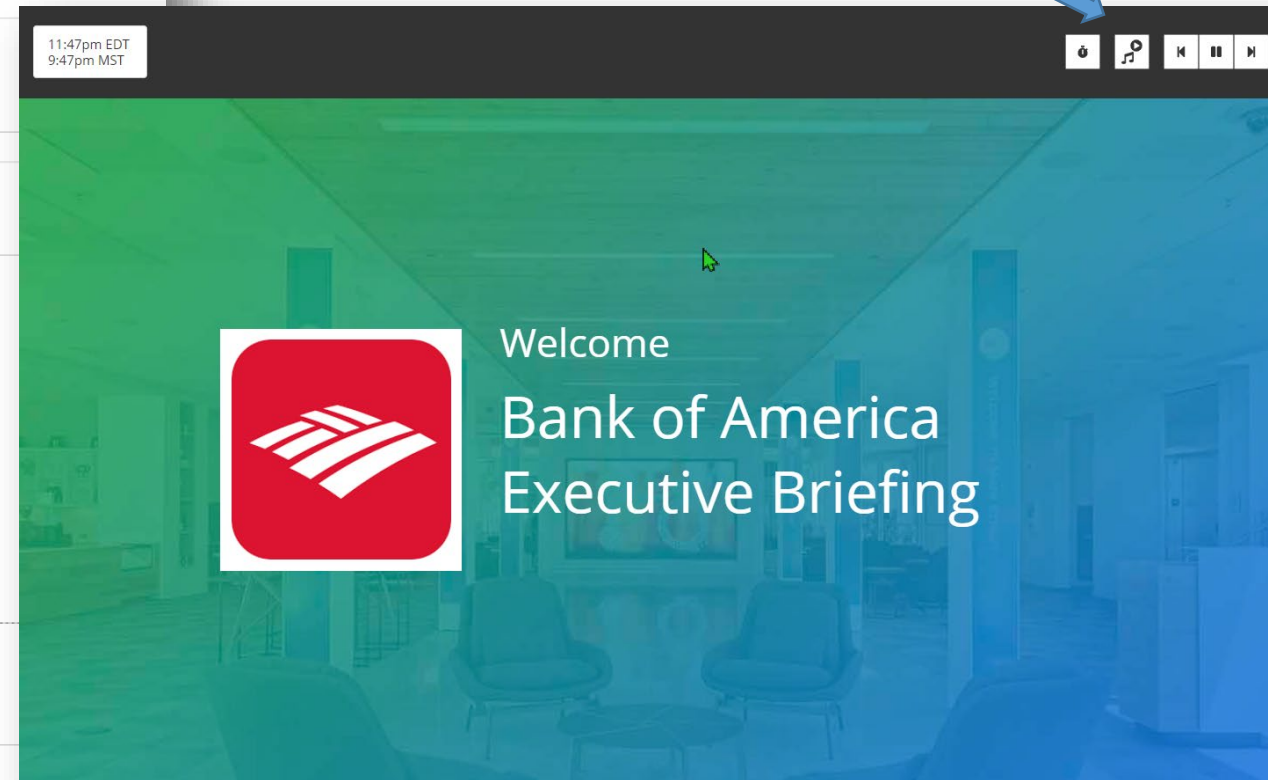
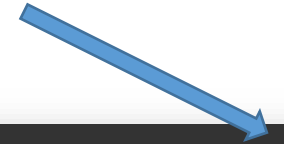
Audio

Speaker Label *
Discussion Leader

Show Speaker Headshot
☒ On

Default Additional Media

Control the music here!



How do you view?



Choose between weekly or monthly views

Calendar

Center: New York Signet Exper... Date Range: 9/13/2021 - 9/17/2021

Monday, Sep 13	Tuesday, Sep 14	Wednesday, Sep 15	Thursday, Sep 16	Friday, Sep 17
<p>From request to briefing 10:30am - 10:00pm EDT Green Room</p> <p>8 3 0</p>	No briefings scheduled on this day.	No briefings scheduled on this day.	No briefings scheduled on this day.	No briefings scheduled on this day.

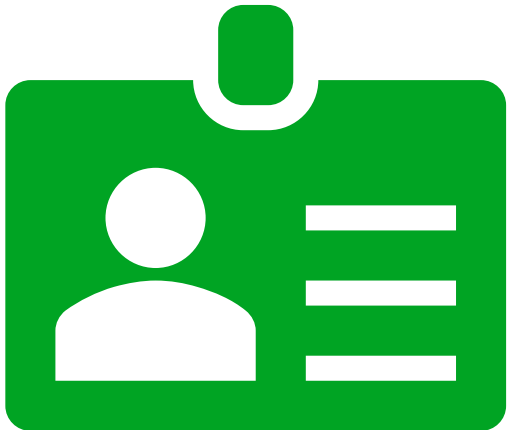
Add'l flags

- Engagement Type
- Center
- Month/Week

Calendar

Engagement Type: All Center: New York Signet Exper... Month and Year: 9/2021

Monday	Tuesday	Wednesday	Thursday	Friday
<p>Aug 30</p> <p>No briefings scheduled on this day.</p>	<p>Aug 31</p> <p>No briefings scheduled on this day.</p>	<p>Sep 01</p> <p>No briefings scheduled on this day.</p>	<p>Sep 02</p> <p>No briefings scheduled on this day.</p>	<p>Sep 03</p> <p>No briefings scheduled on this day.</p>
<p>Sep 06</p> <p>No briefings scheduled on this day.</p>	<p>Sep 07</p> <p>2 Calendar Meeting 5:00am Green Room</p>	<p>Sep 08</p> <p>2 Calendar Meeting 5:00am Room 2</p>	<p>Sep 09</p> <p>No briefings scheduled on this day.</p>	<p>Sep 10</p> <p>Door Monitor Demo 5:00am Room 2</p>
<p>Sep 13</p> <p>From request to briefing 10:30am Green Room</p>	<p>Sep 14</p> <p>No briefings scheduled on this day.</p>	<p>Sep 15</p> <p>No briefings scheduled on this day.</p>	<p>Sep 16</p> <p>No briefings scheduled on this day.</p>	<p>Sep 17</p> <p>No briefings scheduled on this day.</p>
<p>Sep 20</p> <p>No briefings scheduled on this day.</p>	<p>Sep 21</p> <p>No briefings scheduled on this day.</p>	<p>Sep 22</p> <p>Shane 5:30am Virtual</p>	<p>Sep 23</p> <p>No briefings scheduled on this day.</p>	<p>Sep 24</p> <p>No briefings scheduled on this day.</p>
<p>Sep 27</p> <p>No briefings scheduled on this day.</p>	<p>Sep 28</p> <p>No briefings scheduled on this day.</p>	<p>Sep 29</p> <p>No briefings scheduled on this day.</p>	<p>Sep 30</p> <p>Citi Financial Executive Br... 10:00am Green Room</p>	<p>Oct 01</p> <p>No briefings scheduled on this day.</p>



For Video and text FAQ check us out @
<https://info.signet.tv/knowledge>

Our support team is available @ support@signet.tv

For additional training reach out to your Customer
Success Manager or Success@Signet.tv