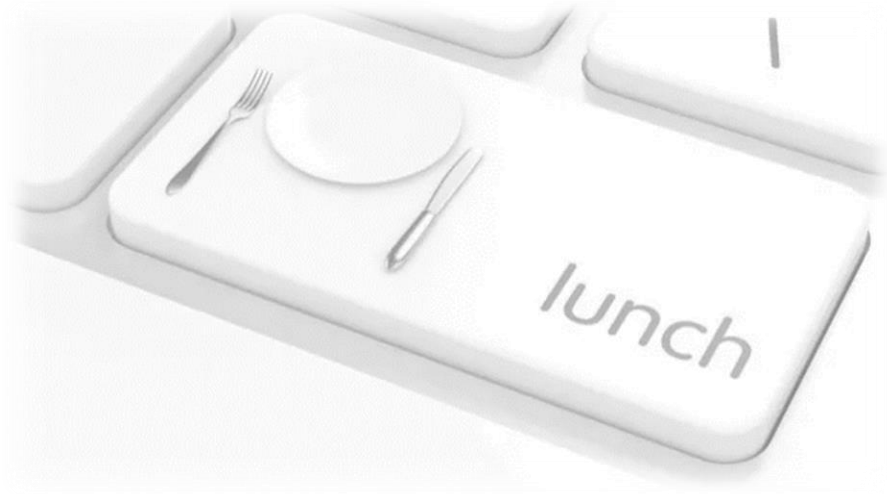


x nexus



Nexus Platform Lunch-n-Learn Apr 6, 2022

TODAY'S SESSION IS FOCUSED ON



NEXUS RELEASE HIGHLIGHTS

- Briefing request form enhancements
- Speaker calendar invite per Agenda item
- New Briefing Status = CANCELED
- Advanced filters for reporting page
 - Programs: New entities (Segments / Regions)
- Preferences: Ability to select multiple centers for automated emails

Request Form Enhancements



- Alternate Briefing Request Date
- Briefing Start and End Date
- Attendee Entry
- Request Agenda Topics
- Custom Fields

Customer Briefing Request Form

Please enter all briefing request details and the local center team will be in touch shortly.

Briefing Info

Center Location *

Briefing Request Date *

Alternate Briefing Request Date *

Briefing Start Time *

Briefing End Time *

Briefing Format *

Estimated # of Attendees *

Select single answer *

Text Answer *

Multi-Select Question *

Briefing Objective and Notes *

Requester Name *

Requester Email *

Opportunity Details

Is this an Opportunity?
☒ Yes

Opportunity Name *

Opportunity ID

Opportunity Amount *

Opportunity Probability (%) *

Estimated Opportunity Close Date *

Opportunity Description

[Add Additional Opportunity](#)

Account Details

Account Name *

Account CRM ID *

Annual Revenue *

Account Industry *

Account Description

Attendees

[Add Attendee](#)

Request Agenda Topics


[Add Topic](#)

Submit

Speaker Invite



- Ability to send calendar invites to speakers per agenda item

 Adobe Executive Briefing Actions ▾

Overview

Agenda

Attendees

Facilitation

Impressions

Evaluations

Wrap-up

More ▾

Internal Attendees: 1

Agenda Topics: 5

Speakers: 4

External Attendees: 2

Pre-Briefing Customer Impressions

Daily Sessions	Media Views	Media Emailed
0	0	0

Briefing Details

Account: [Adobe](#)
Industry: Telecommunications
Customer Briefing | In-Person
New York Signet Experience Center
Briefing Manager: [Liz Blacklock](#)
Thu, Mar 31, 2022 | 7:00am - 9:00am EDT
Room 2
ID & PIN: 543 | a47xcjhC

Engagement Reports

Planning Report
[Preview](#) | [Download](#)

Wrap-up Report
The briefing has not started yet.

Launch ▾

Print ▾

Email ▾

Copy ▾

Calendar invite

Customer Portal Direct Access Link

Customer Portal General Access Link

Send Meeting Invite

Select attendees or speakers to receive a meeting invite to this engagement.

Speakers ▾

<input type="checkbox"/>	ATTENDEE	STATUS
<input type="checkbox"/>	Alex Gold alex.maniuk@signet.tv	Sent
<input type="checkbox"/>	Liz Blacklock liz.blacklock@signet.tv	Accepted
<input type="checkbox"/>	Andrew Wojakowski Success@signet.tv	Not Sent
<input checked="" type="checkbox"/>	Neil Rieger No Email	Not Sent

You can preview and edit the template on the next screen.

Next Cancel

Briefing Status



- Ability to cancel briefing

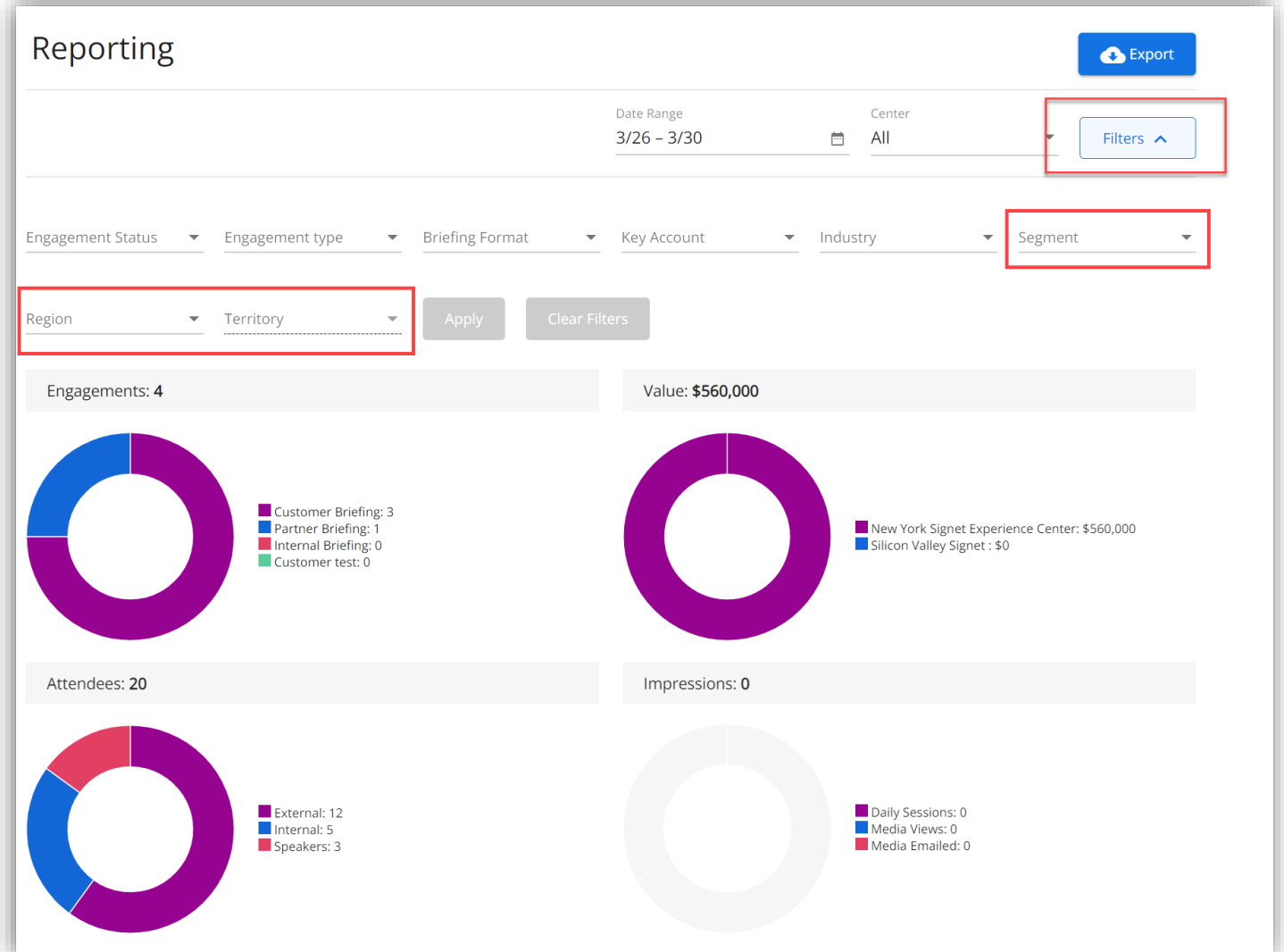
The screenshot displays the 'Kaiser Permanente Executive Briefing' interface. On the left is a sidebar with navigation links: Overview (selected), Agenda, Attendees, Facilitation, Impressions, Evaluations, and Wrap-up. Below these is a 'More' link with a downward arrow. The main content area is divided into three sections. The top section shows attendee counts: Internal Attendees: 1, Agenda Topics: 8, Speakers: 4, and External Attendees: 1. The middle section, titled 'Pre-Briefing Customer Impressions', contains a table with three columns: 'Daily Sessions' (value 1), 'Media Views' (value 0), and 'Media Emailed' (value 0). The bottom section contains 'Briefing Details' (Account: Kaiser, Industry: Healthcare, Customer Briefing | Virtual, New York Signet Experience Center, Briefing Manager: Liz Blacklock, Thu, Mar 31, 2022 | 10:00am - 2:00pm EDT, Virtual, ID & PIN: 417 | x6PyEGUP), 'Engagement Reports' (Planning Report with Preview and Download links, and Wrap-up Report with the note 'The briefing has not started yet.'), and a row of four action buttons: Launch, Print, Email, and Copy. An 'Actions' dropdown menu is open in the top right corner, with the 'Cancel' option highlighted by a red rectangle. Other options in the menu are Duplicate and Delete.

Reporting Filters



Advanced Filters

- Segment
- Region
- Territory
- These are added to your accounts
- For integrated clients – these fields will not show up



Recurring Email Preferences



- Ability to select multiple centers for automated emails

The screenshot shows a 'Preferences' dialog box with a 'Recurring Emails' tab. It contains two sections for email preferences. The first section, 'Receive Weekly Debrief Email', has a toggle set to 'Yes'. Below it, a 'Center *' dropdown menu is open, showing three options: 'All' (unchecked), 'Silicon Valley Signet' (checked), and 'New York Signet Experience Center' (unchecked). A red box highlights the 'Silicon Valley Signet' option, with a red arrow pointing to it from a text box that says 'Default center is always active'. The second section, 'Receive New Briefing Requests Email', has a toggle set to 'No'. Below it, a 'Center' dropdown menu is open, showing 'Silicon Valley Signet' as the selected option. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Preferences

Recurring Emails

Please select which system email to receive.

Receive Weekly Debrief Email
☒ Yes

Center *

Clear Filters

☐ All

☒ Silicon Valley Signet

☐ New York Signet Experience Center

Select center(s) to receive emails from.

Receive New Briefing Requests Email
☐ No

Center
Silicon Valley Signet

Select center(s) to receive emails from.

Save Cancel

Let's dive in!