



Nexus Platform Lunch-n-Learn Apr 20, 2022  
Briefing Request Form + Enhancements

# TODAY'S SESSION IS FOCUSED ON

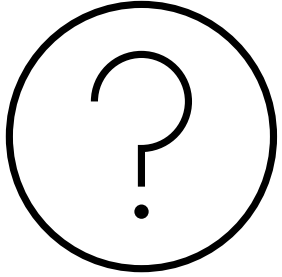
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## **BREIFING REQUEST FORM**

- ✓ Required Fields
- ✓ Toggle fields
- ✓ Custom Text Fields
- ✓ Custom Single or Multi-Select
- ✓ Add Attendees

# Briefing Request Form



The Briefing Request form can be the first step to getting a briefing on the books for your program. Whether this is from Salesforce, MS Dynamics or your internal site the Nexus tool allows you to ask the right questions to optimize the briefing process.

## Required Fields

- Center Location
- Briefing Request Date
- Briefing Format
- Estimated # of Attendees
- Briefing Objectives and Notes

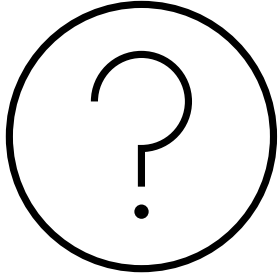
## Optional Fields

- Alternate Briefing Request Date
- Briefing Start and End Date
- Attendee Entry (free text)
- Request Agenda Topics (free text)

## Create Custom Fields

- Text answer
- Single Select answer
- Multi-Select answer

# Briefing Request Form - Integration

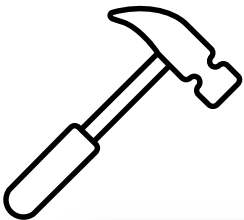


...Then layer on the critical CRM information through the automation for reporting

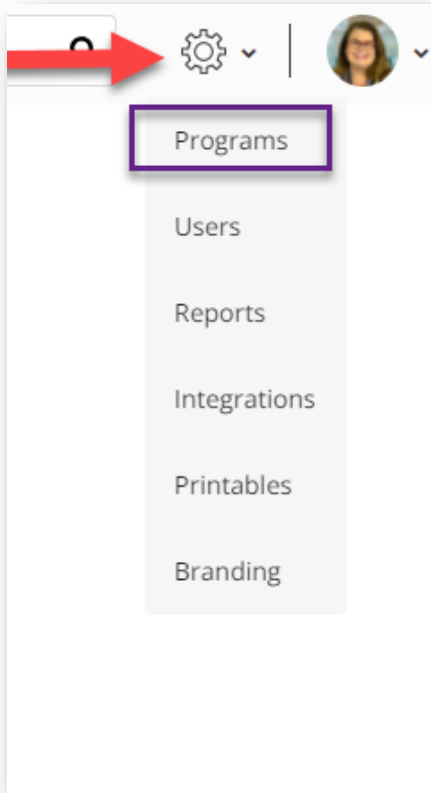
## **CRM Fields**

- Requestor Name/Email
- Opportunity Name
- Opportunity ID
- Opportunity Amount
- Opportunity Probability
- Estimated Close Date
- Opportunity Description
- Account Name
- Account CRM ID
- Annual Revenue
- Account Industry

# Editing the Form



To access the form, click on the right-side COG and select PROGRAMS.



### Programs

Centers

Rooms

Accounts

Industries

Engagement Types

Engagement Requests

Topic Categories

Agenda Templates

Evaluations

Emails

Email Settings

**Briefing Request Form**

Include Alternate Briefing Request Date

☒ Yes

Include Briefing Start and End Time

☐ No

Include Attendee Entry

☒ Yes

Include Request Agenda Topics

☒ Yes

Include Custom Fields

☒ Yes

Custom Fields

Add Custom Field

ORDER	FIELD NAME	FORMAT
= 1	Executive attendance needed?	Single Selection Dropdown
= 2	Executive Requested (name)	Text Field
= 3	NDA In Place?	Single Selection Dropdown
= 4	Topic Categories Requested	Multiple Selection Dropdown
= 5	DEMO Requests	Multiple Selection Dropdown

Toggle on/off

Create as needed

Let's dive in!