Online Demo Scheduling Tool: User Guide

This document provides step by step instructions on how to successful use the Online Demo Scheduling tool for pre booking appointments for tradeshows/congresses.

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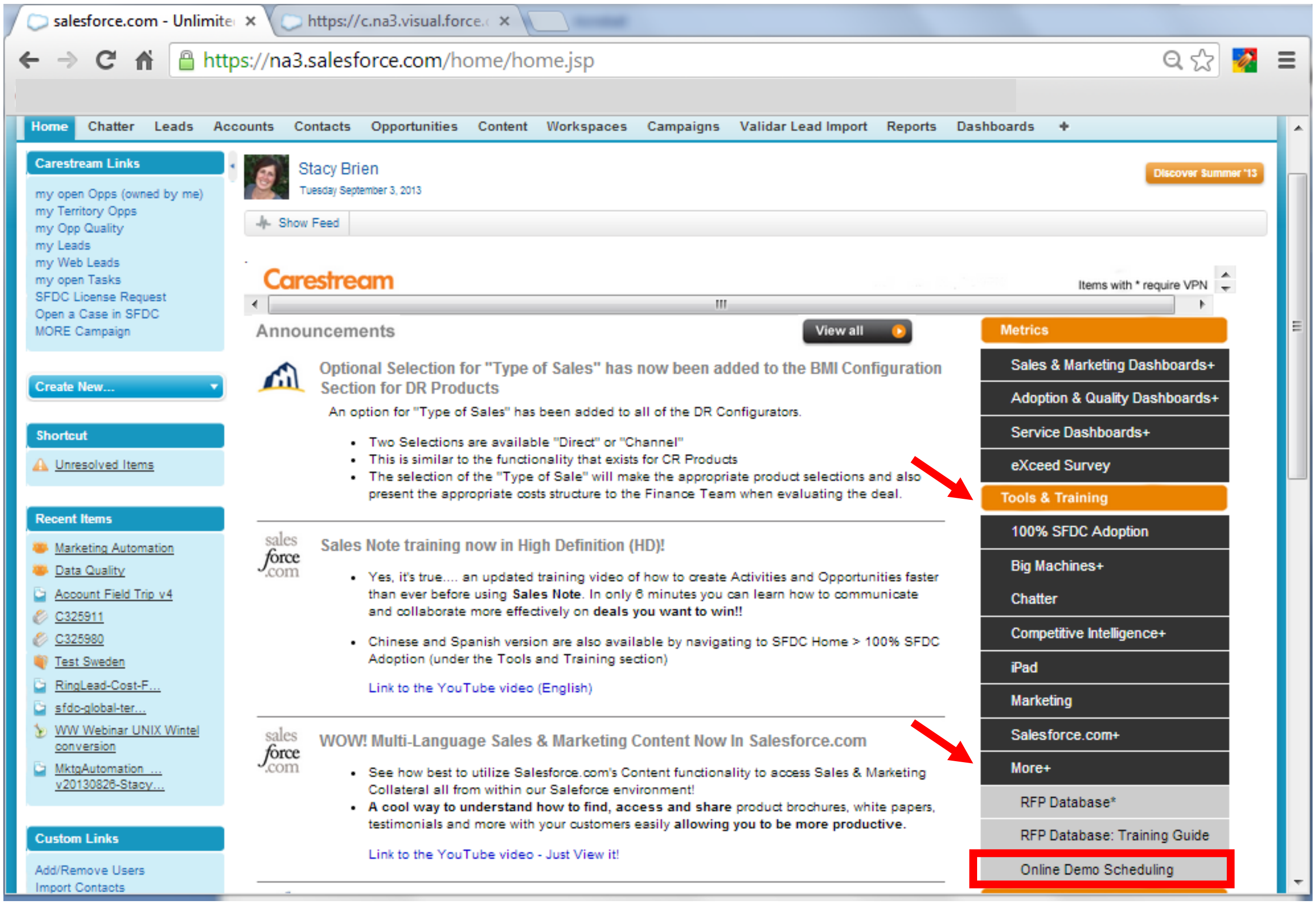
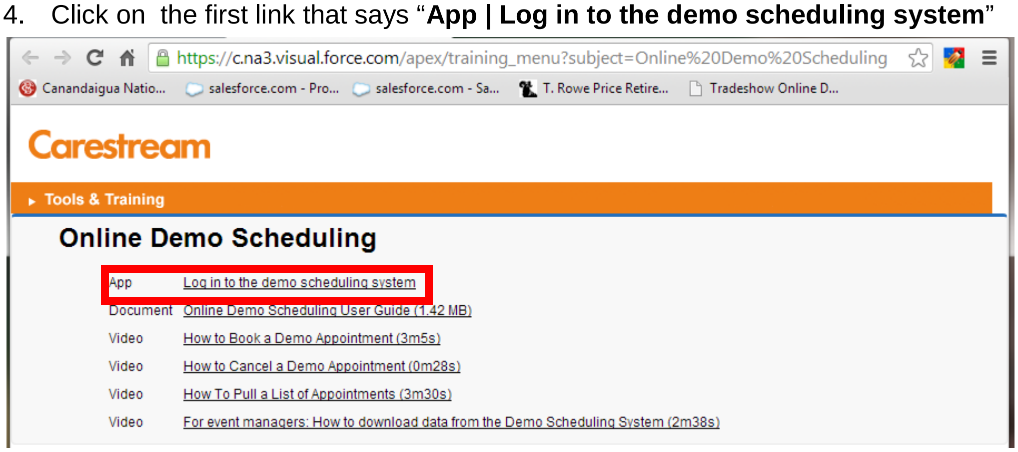
September 16, 2013

How to Log into the Online Demo Scheduling Tool

1. Log in to Salesforce.com, using Google Chrome or Firefox. Scroll to the bottom of the home page and select the '**More+**' button in the Tools & Training Menu of the right navigation.
2. The 'More+' button will expand down three options. Click on the '**Online Demo Scheduling**' button.



3. Bookmark this page in your web browser.
4. Click on the first link that says "**App | Log in to the demo scheduling system**"



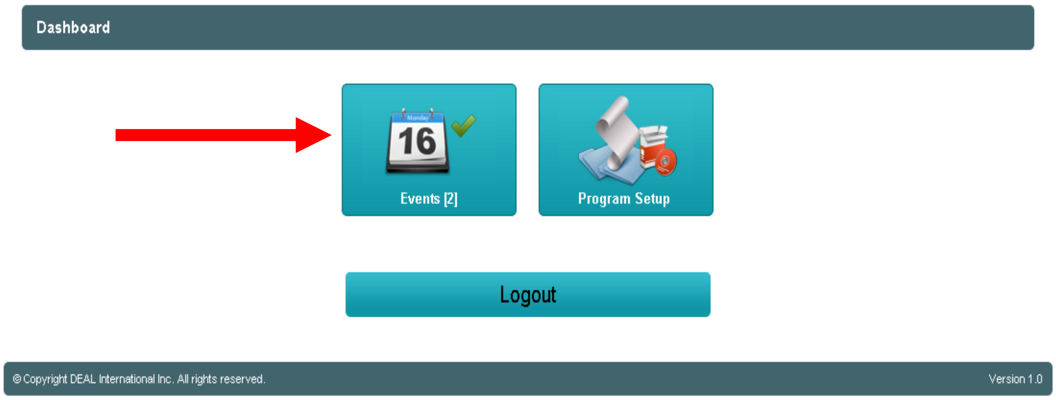
5. Log into the application (User name = Carestream email address, Password = Global ID)

How to Book a Demo Appointment

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.

2. From dashboard click the **’Events’** icon to see details about the events.



3. From the ‘Events List’ screen, click the ‘**Goto**’ arrow for the event you want to book an appointment for. Note that you will only see listed the events you have permissions to schedule for.

Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA 2012** RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA CONF RM** RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

4. From the ‘Events Dashboard’ click the ‘**View Schedule**’ icon to book a new appointment.

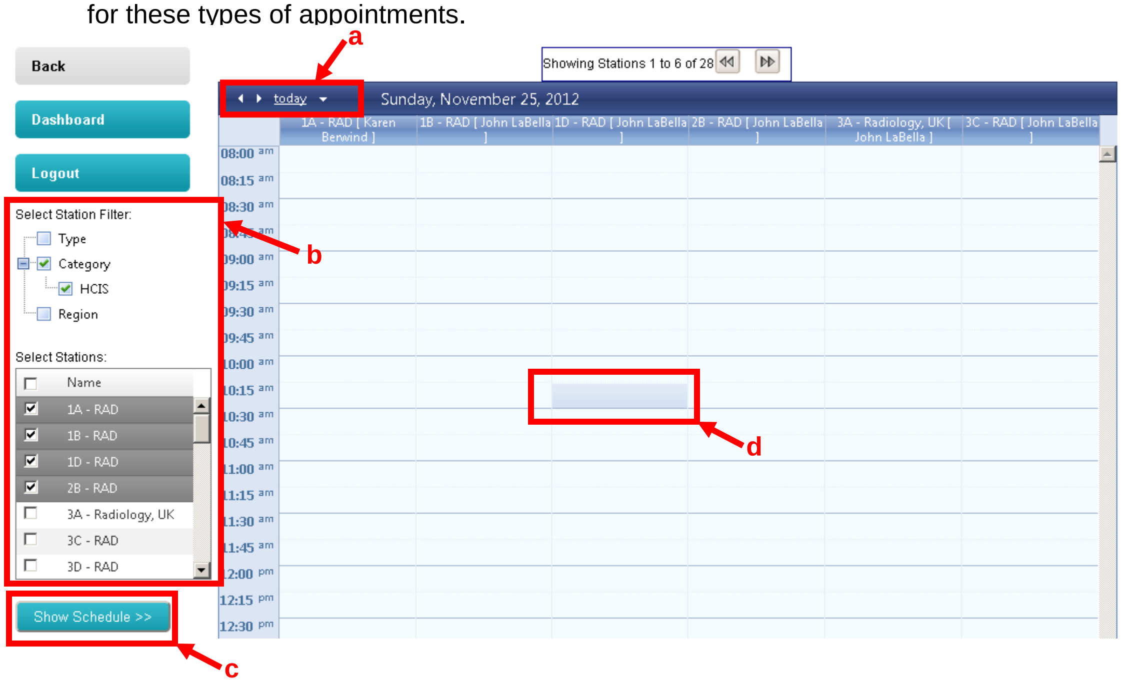
This will bring you to the calendar view of that event. From here you will want to:

a. Select the date of the appointment you want to schedule at the top left of the calendar view.

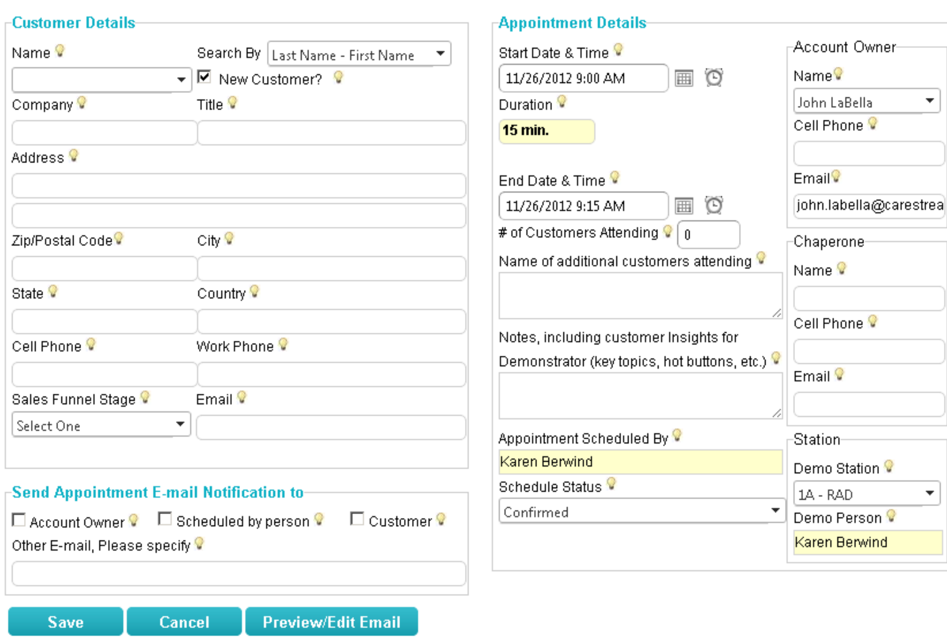
b. Then use the '**Select Station Filter**' from the left navigation to filter which station you are booking for (ex. 'Category' select HCIS, and then under '**Select Stations**' choose all Demo areas you wish to see the schedule for).

c. Click '**Apply Filter'**. This will refresh your screen and only show the availability for what you the date you selected, and the items you identified in the 'Select Station Filter' and 'Select Station' areas.

d. Similar to other calendaring tools you will **single click** on the time block you want to book. Note: Most demo appointments are scheduled in 15 min time slots due to the large volume of requests for these types of appointments.

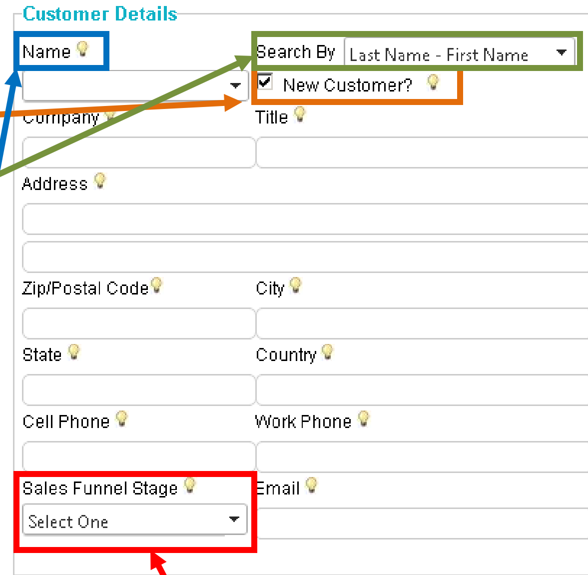


5. Selecting the time slot in step 4.d automatically opens up the form that needs to be submitted to book the appointment.



a. Complete three areas (Customer Details, Appointment Details and Send Appointment Notification Email):

1. **Customer Details**



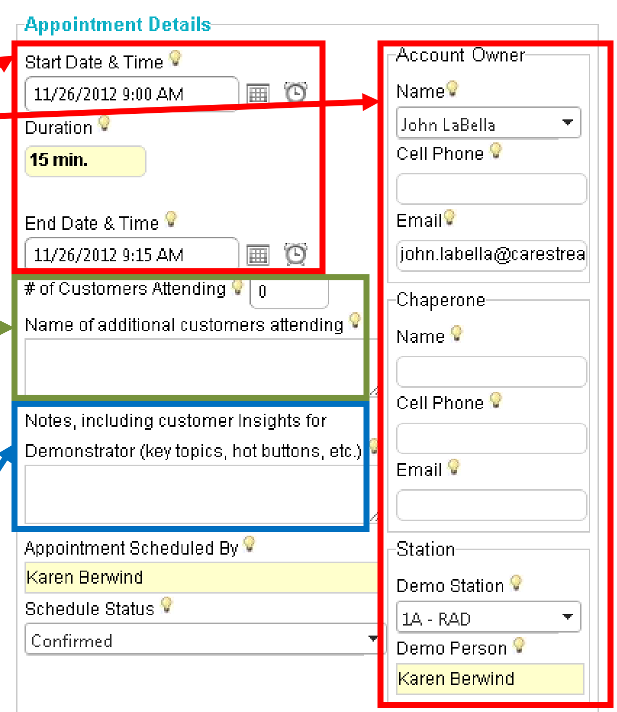
   i. If you are booking an appointment for a new customer, the '**New Customer**' check box is automatically selected and you will need to fill out the information for the new customer.

   ii. If it is for an existing customer, use the '**Search By**' functionality to identify how you would like to search for the user ('Last Name – First Name' or 'First Name – Last Name').

   iii. Once you have chosen how you will search for the customer go back to the '**Name**' field and type in the customer's name you want to find. The search tool is synced to SFDC and will populate the name as you type it.

   iv. Confirm the information and ensure you designate the '**Sales Funnel Stage**'.

2. **Appointment Details**



   i. Review and confirm the information stored in the 'Start Date & Time', 'Scheduled Status', 'Account Owner', 'Chaperone' and 'Station' sections for accuracy.

   ii. If the customer is bringing additional customers, list out their names and email addresses in the box under the label '**Name of additional customers attending**.'

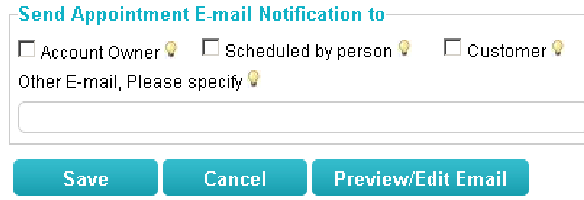
   iii. If the 'Chaperone' is not identified and the account owner is not attending the event, complete this section.

   iv. You can also additionally add notes for the demonstrator to review at the event to help frame their conversations with the attendees. Be aware that these are seen by the demonstrator and others.

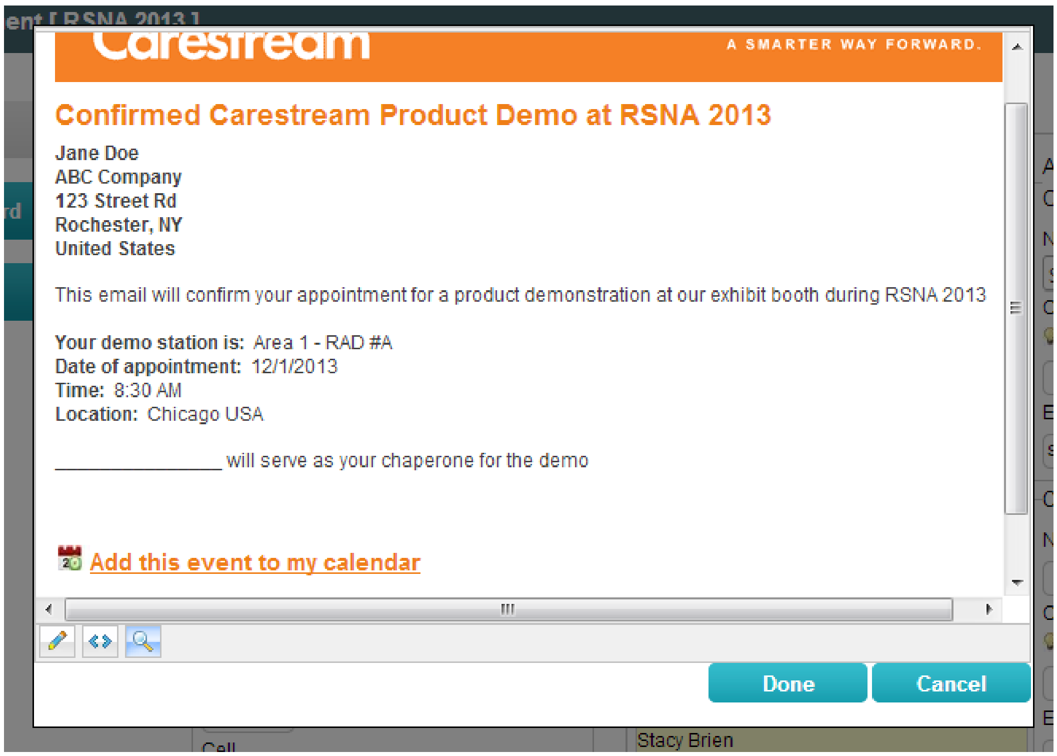
3. **Send Appointment Email Notification**

   i. You can send an appointment confirmation email to the following people: Account Owner, Scheduled by Person, Customer, or any other email address typed into the field under the label 'Other E-mail' or 'Please specify'.

   Select the check box next to the people you want the email to go to, or type in the email address in the field provided.

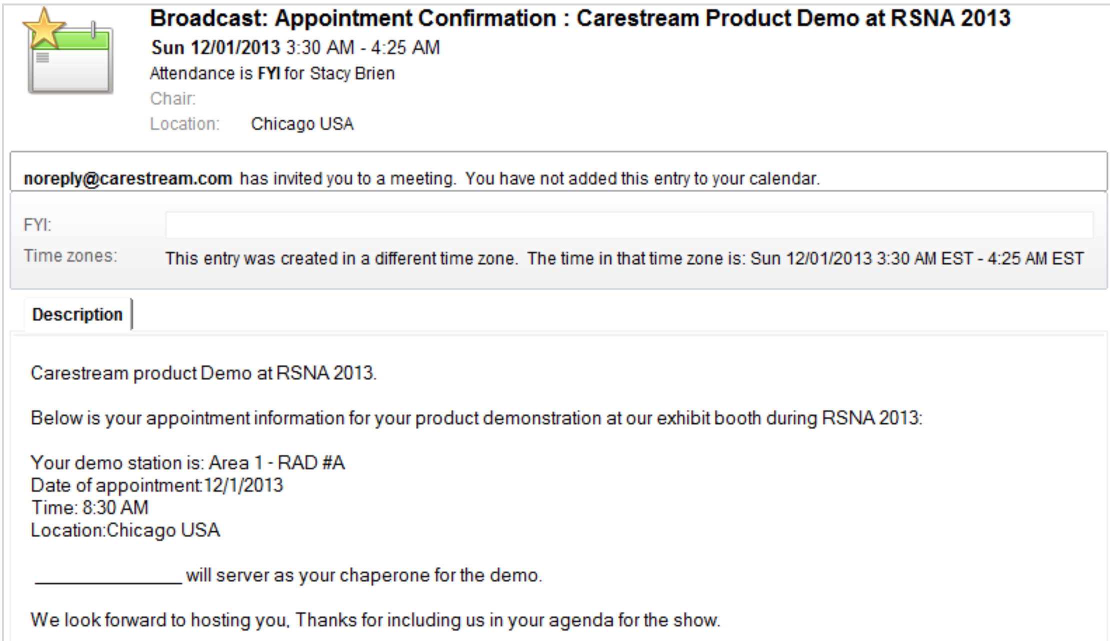


   ii. To preview the email, click the '**Preview/Edit Email**' button. The Preview/Edit window will appear.

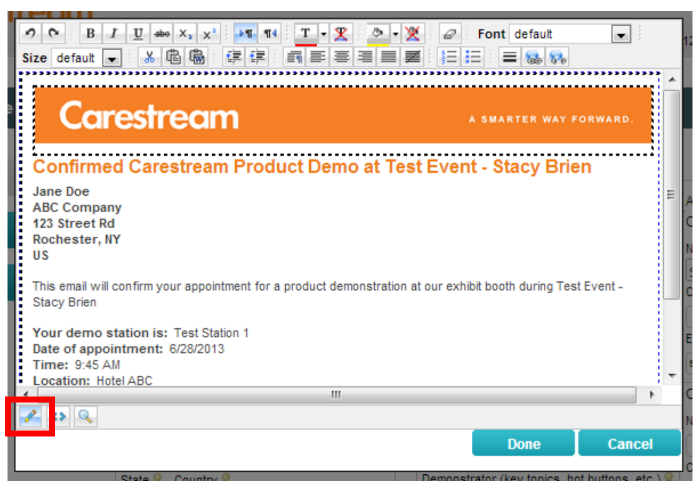


The email will auto-populate with information from the form completed in steps 5.a.1, 5.a.2 and 5.a.3.

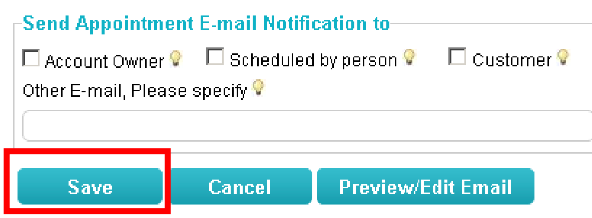
The email will also auto-populate the “Add this event to my calendar” feature, allowing the user to easily add their appointment to their calendars. Below is what they will see when they click the link:



iii. If you need to edit or change information in the email, select ‘**Design Mode**’ () and edit as needed. Click ‘**Done**’.



iv. After you are done reviewing and editing the email, click **Save.** The email will be sent and the appointment will be booked. Note: the email is sent from a generic Carestream address.

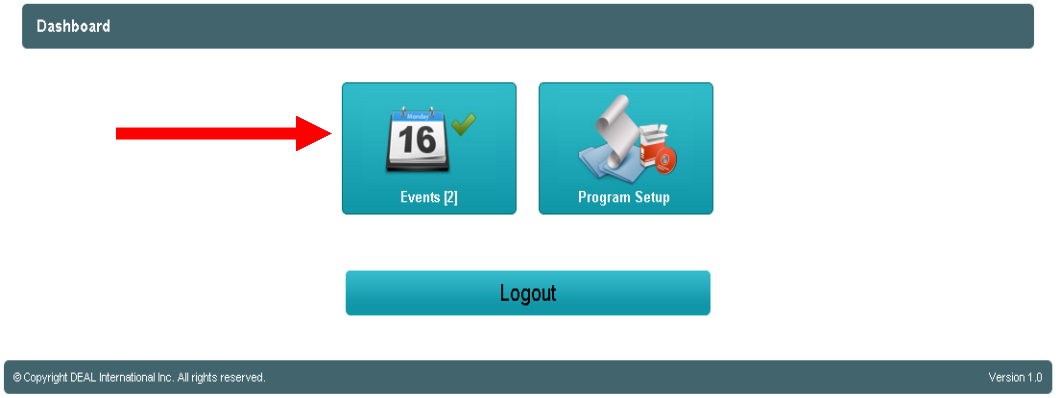


b. To confirm appointment was booked, repeat **Step 4.**

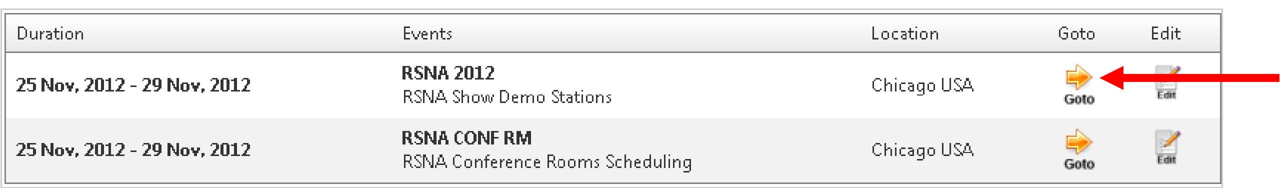
How to Cancel a Demo Appointment

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. From dashboard click the **’Events’** icon to see details about the events.

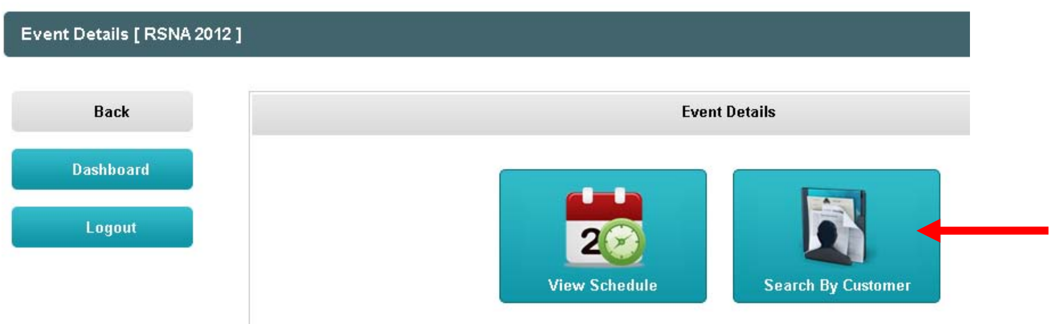


3. From the ‘Events List’ screen, click the ‘**Goto**’ arrow for the event in which the appointment is in that you wish to cancel. Note that you will only see listed the events you have permissions to schedule for.

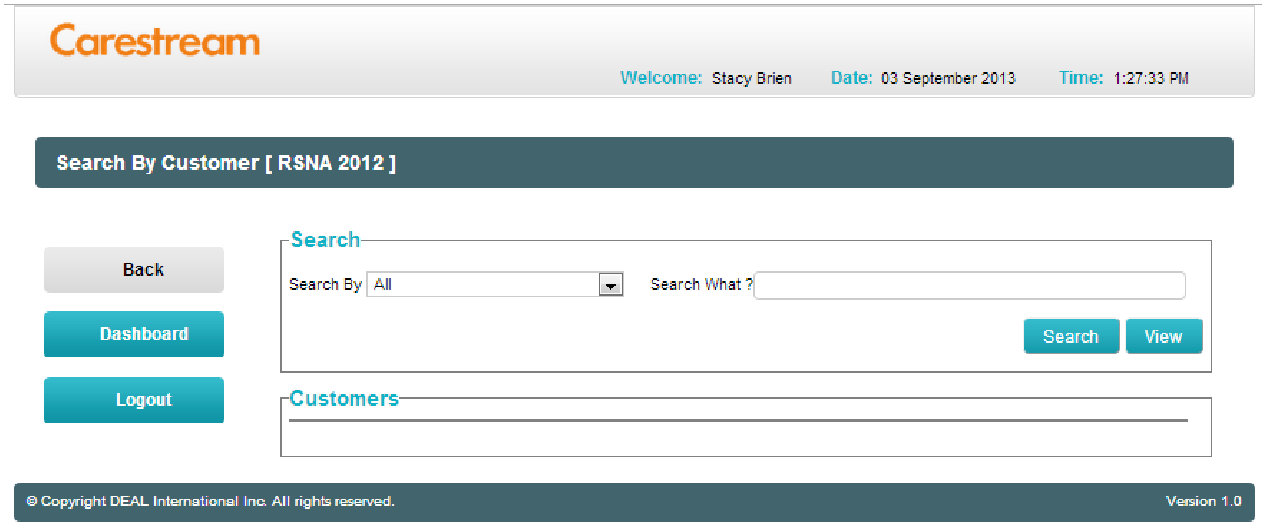


Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA 2012** RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA CONF RM** RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

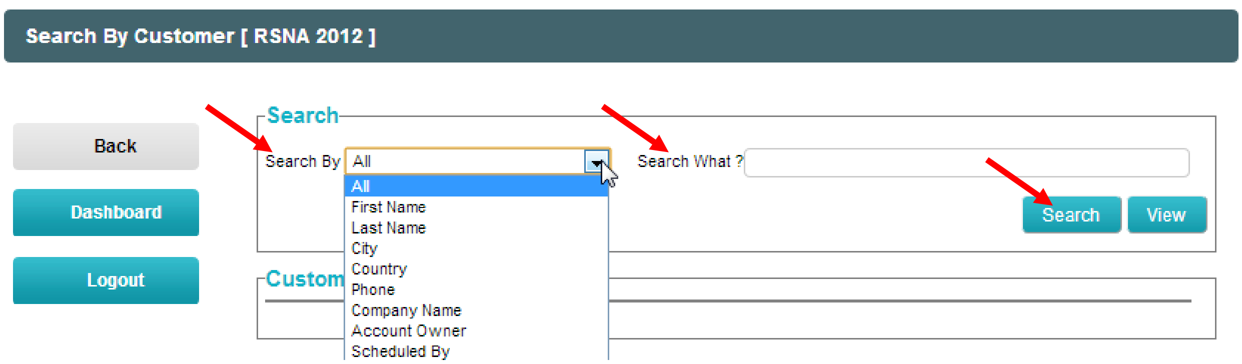
4. From the ‘Events Dashboard’ click the ‘**Search By Customer**’ icon to locate the appointment you want to cancel.



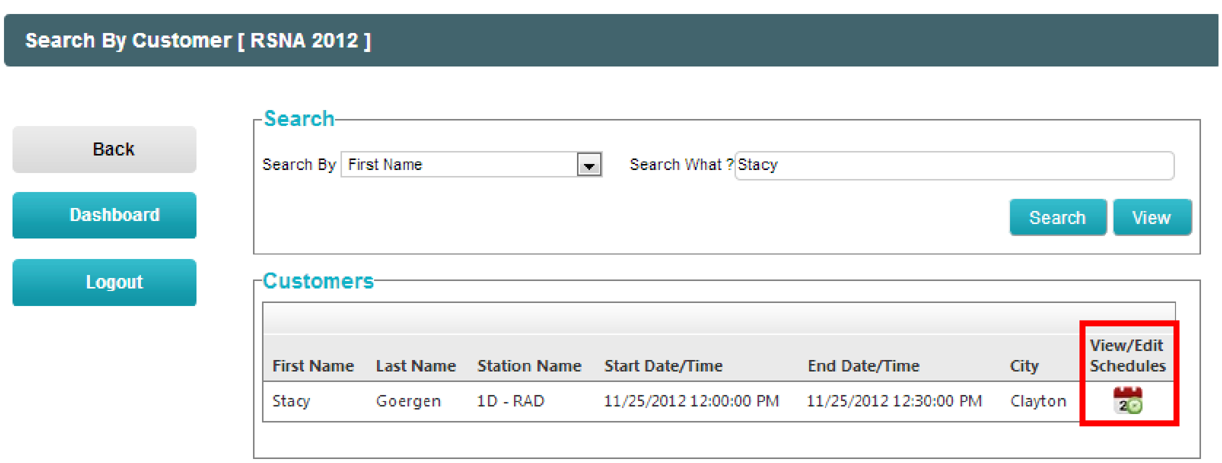
5. The '**Search By Customer**' screen now displays.



a. Select the method in which you want to search by from the '**Search By**' drop down, and then type in the search criteria in the '**Search What?**' field. Click the "**Search**" button to run your search.



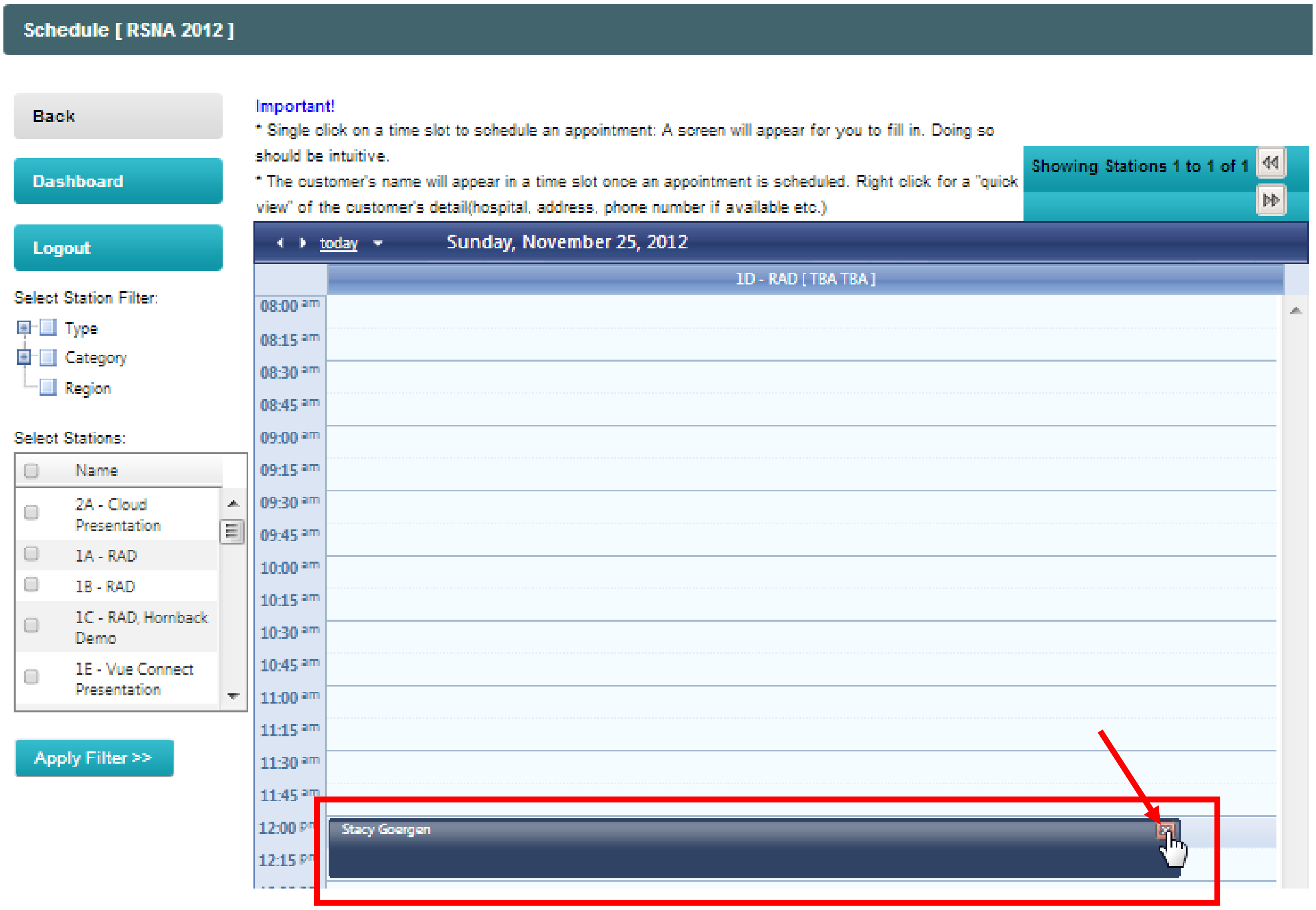
b. You will now see a list of all customers that meet your search criteria. Now click the '**View/Edit Schedule**' () button.



c. You are now shown the calendar view for the date in which the appointment you want to cancel is booked. The appointment you searched for will be shown in Dark Blue.

d. Locate the appointment from the list and hover over the box until you see the red x appear in the upper right corner. **Click the red X** ( ).

e. A prompt will appear asking you to confirm that you want to delete the event. Click '**Ok**'.

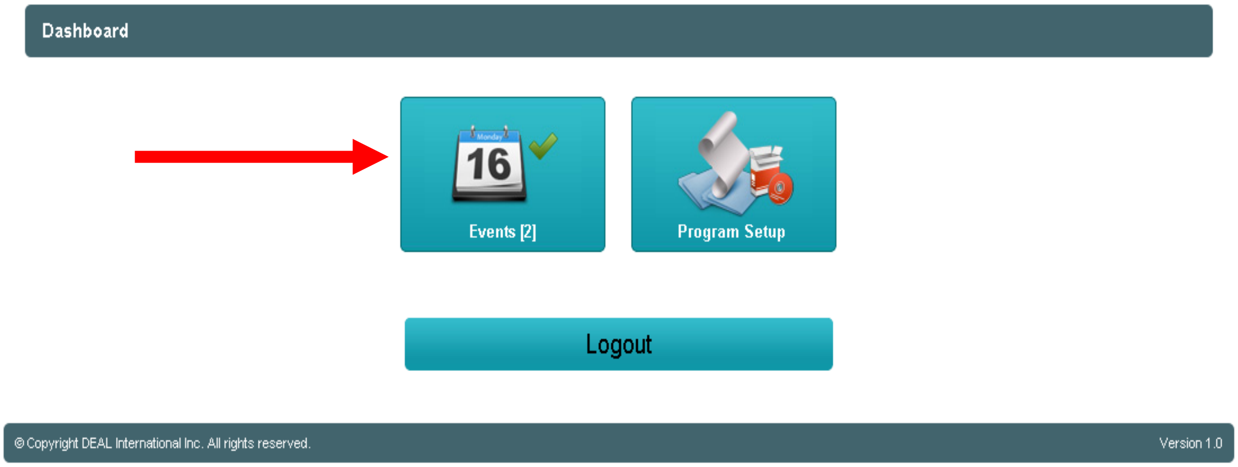


f. Once you confirm, the appointment is removed from the calendar view and deleted.

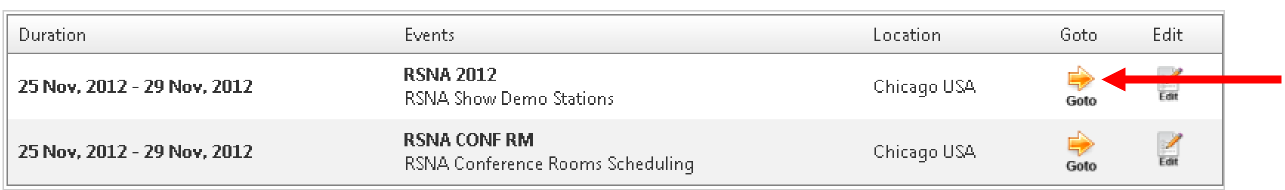
How to Pull a List of Appointments

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. From dashboard click the **’Events’** icon to see details about the events.

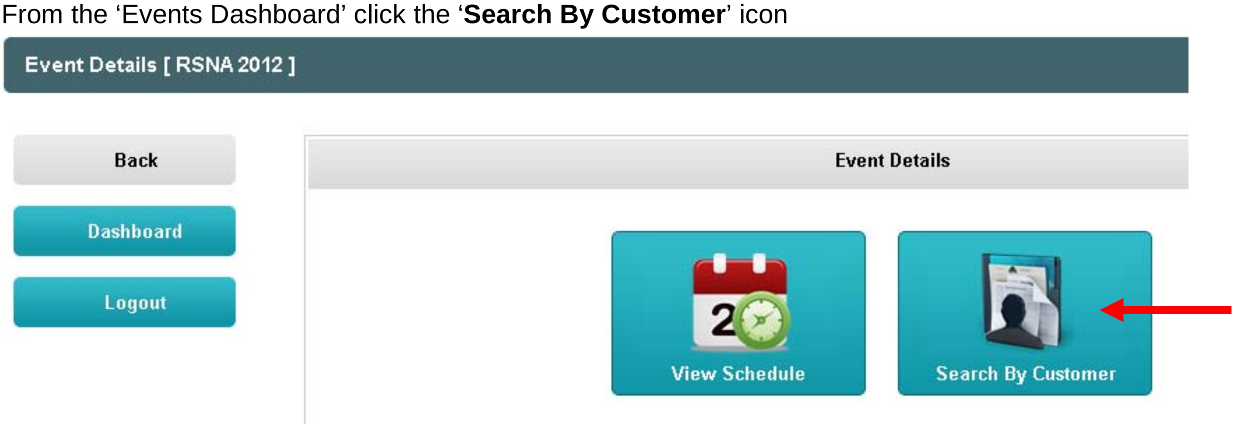


3. From the ‘Events List’ screen, click the ‘**Goto**’ arrow for the event in which you want to pull a list of appointments from. Note that you will only see listed the events you have permissions to schedule for.

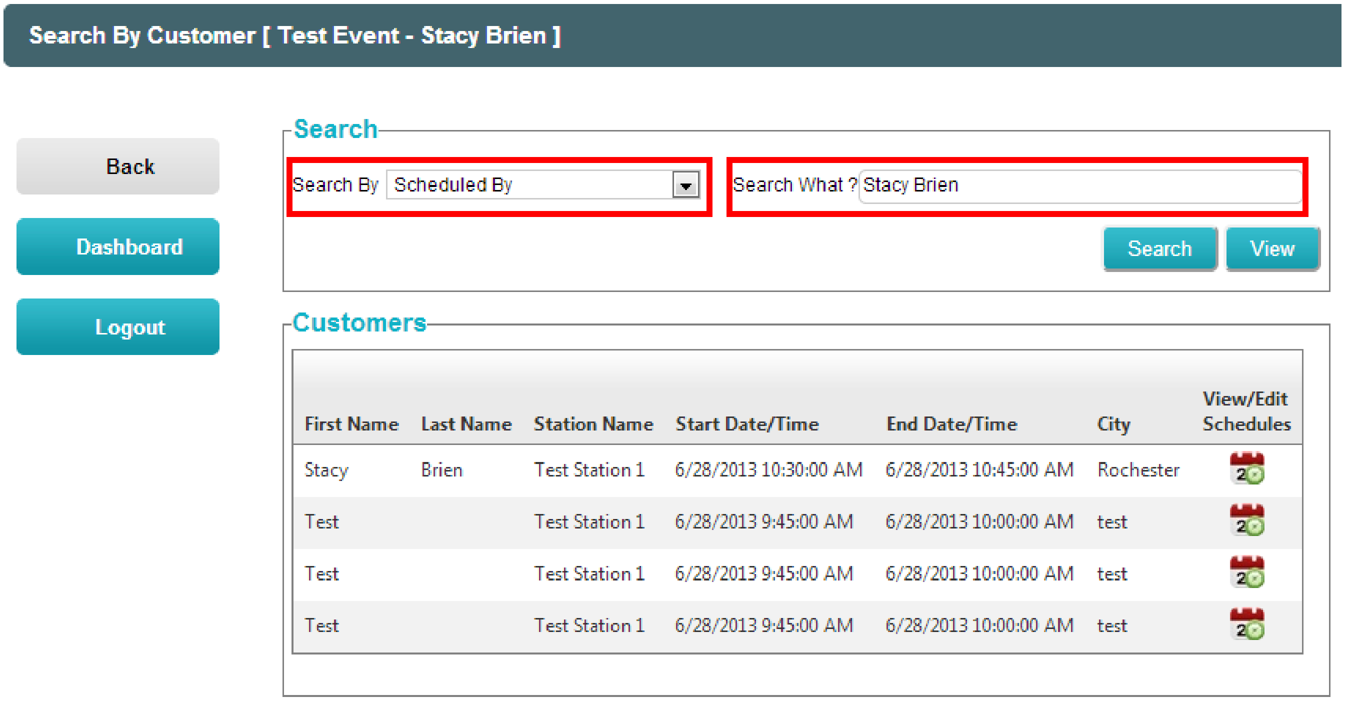


Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA 2012 RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA CONF RM RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

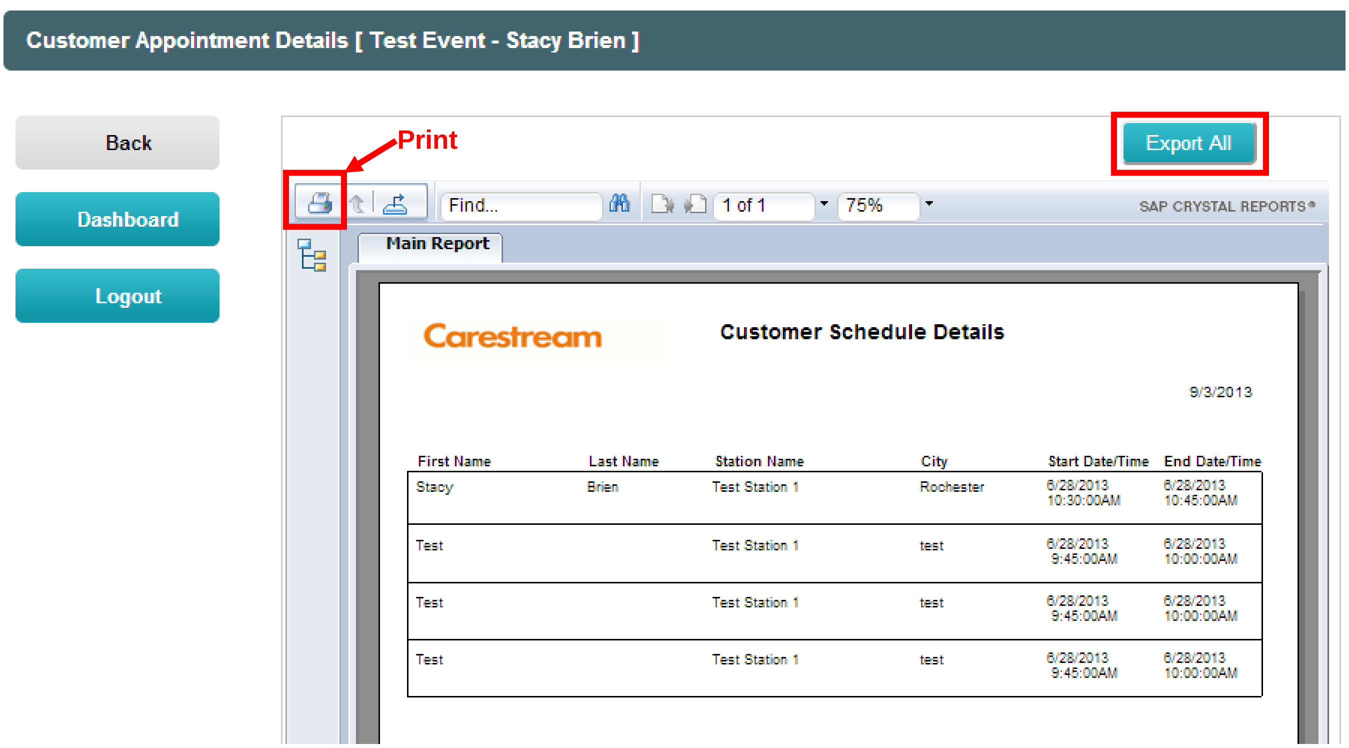
4. From the ‘Events Dashboard’ click the ‘**Search By Customer**’ icon



5. Under '**Search By'** select the method in which you want to search for appointments by. For this example we will use '**Scheduled by**'. Enter the name into the "**Search What?**' field, and click the '**Search**' button. A list of all appointments that were scheduled by the person identified in the 'Search What?' field will now appear.



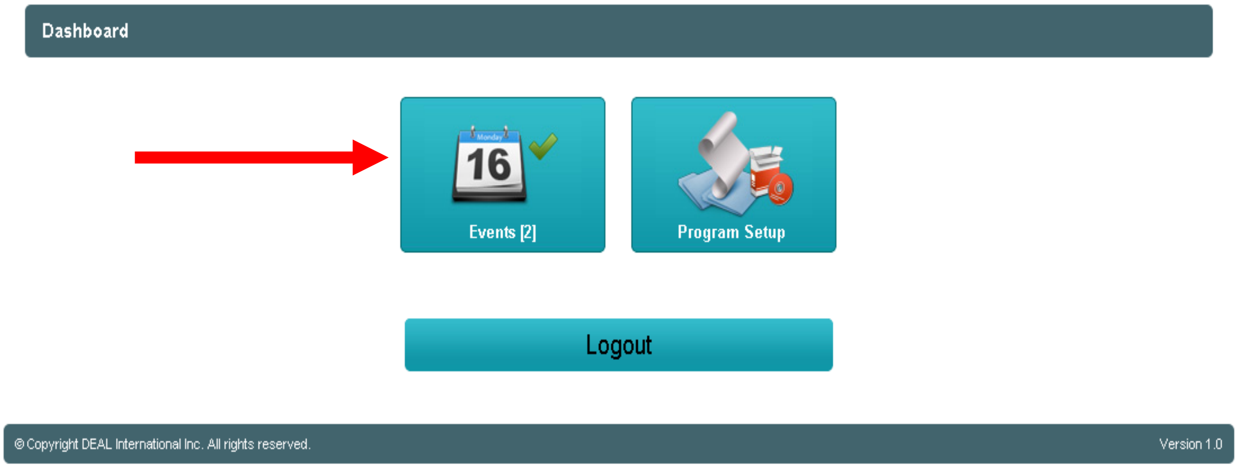
6. Above the list, next to the 'Search' button, you will find the '**View**' button. Click '**View**'
7. This will bring up a print friendly view of the list that you can easily send to your printer. You can also export the list by clicking the '**Export All**' button.



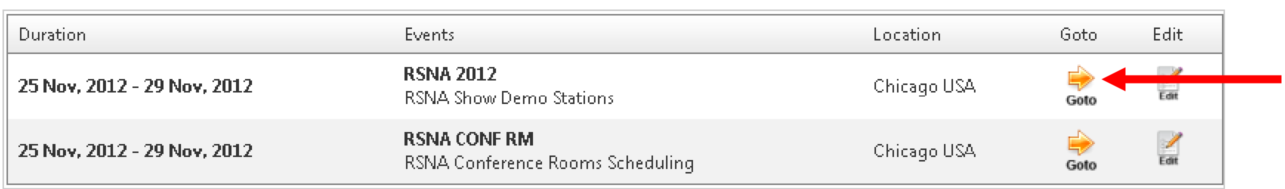
For Administrators and Event Managers: How to Download Data from the Demo Scheduling System

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. From dashboard click the **’Events’** icon to see details about the events.

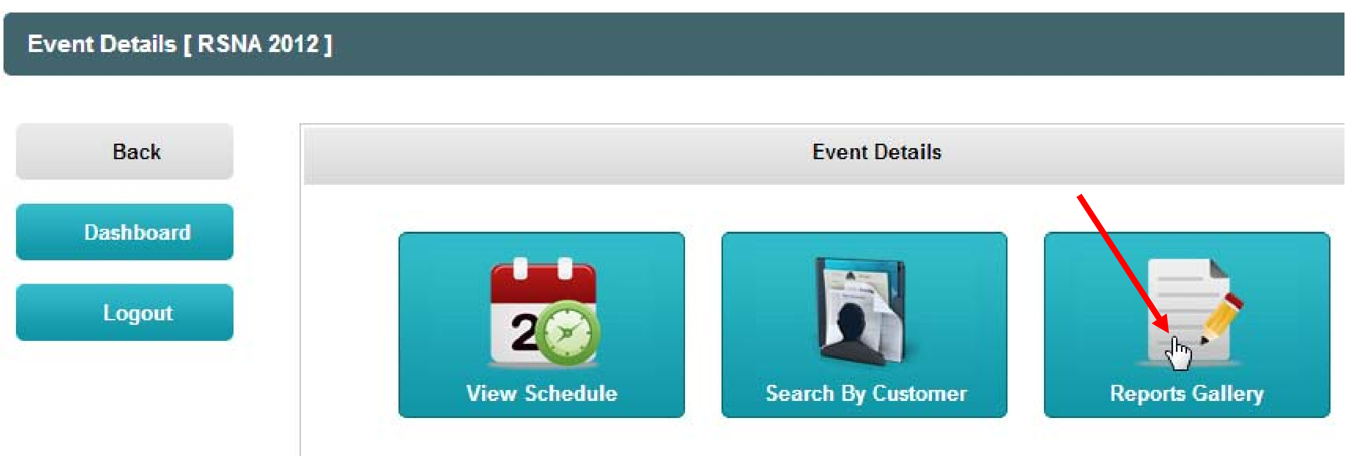


3. From the ‘Events List’ screen, click the ‘**Goto**’ arrow for the event in which you want to download data from. Note that you will only see listed the events you have permissions to schedule for.

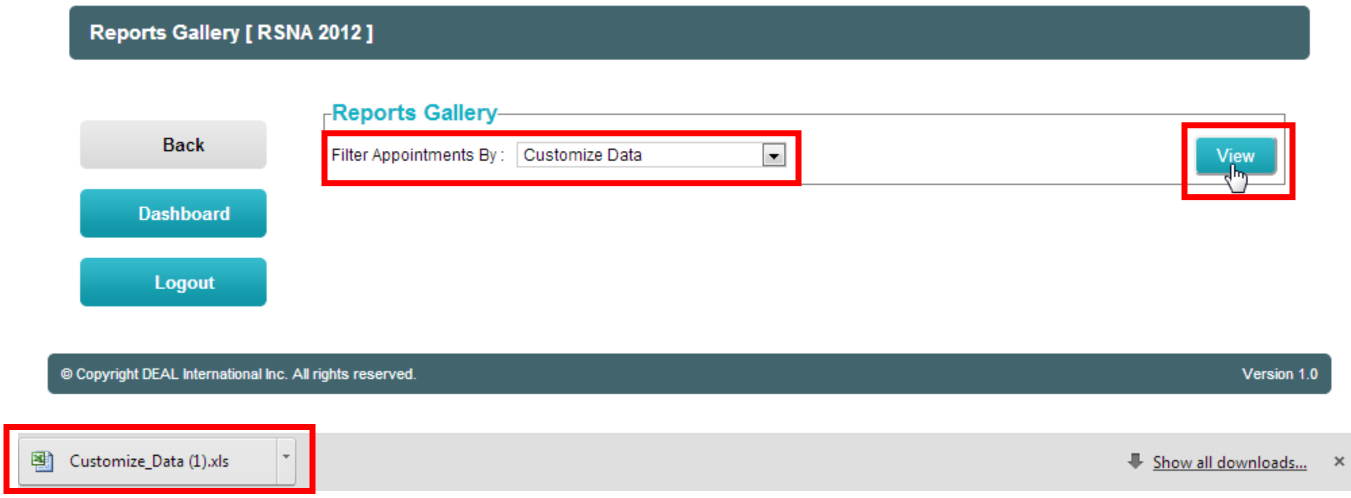


Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA 2012** RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	**RSNA CONF RM** RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

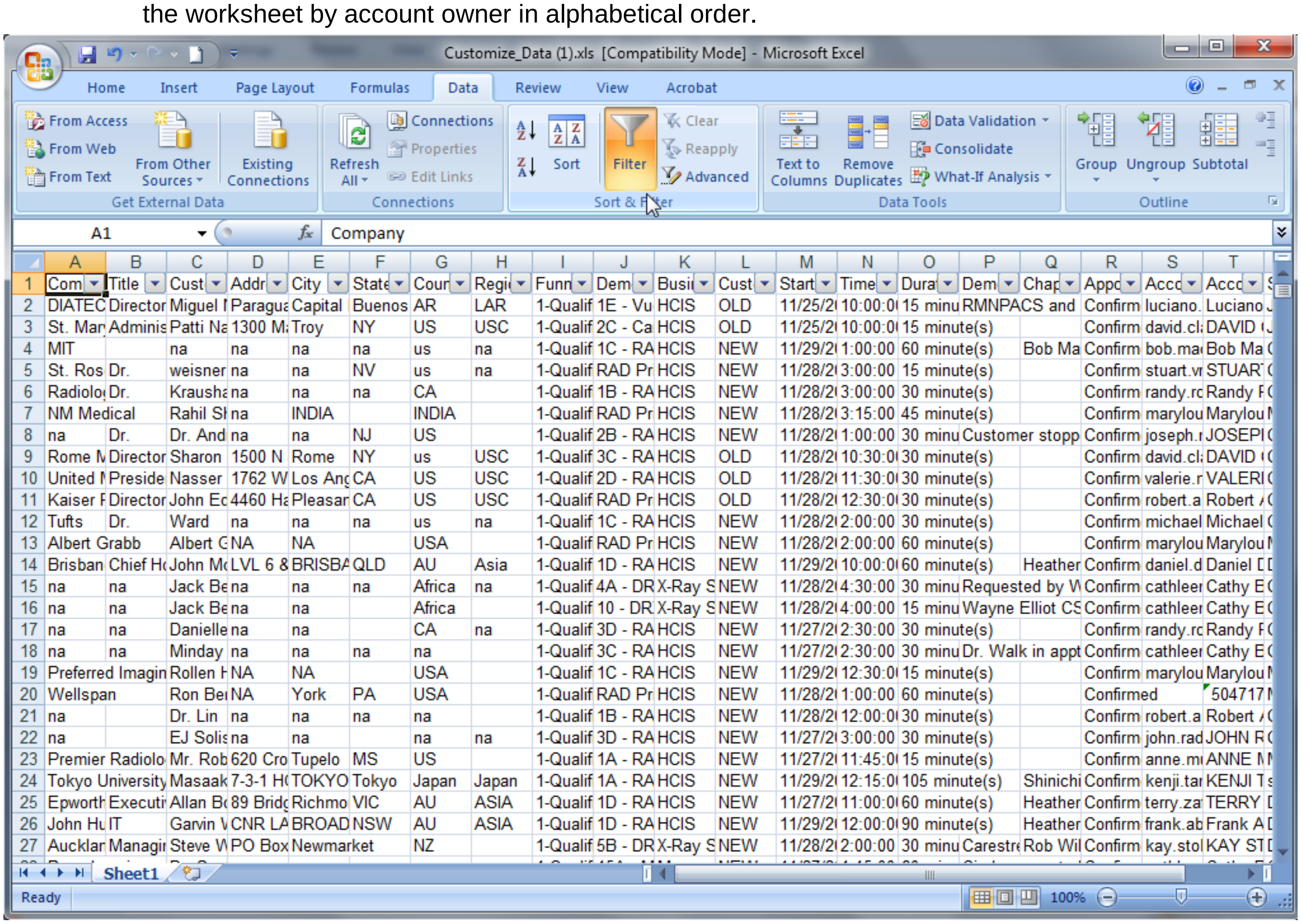
4. From the Events Details screen select the ‘Reports Gallery’ button.



5. In the Reports Gallery section set the '**Filter Appointments By**' field to '**Customize Data**'.
6. Click the '**View**' button, and when the pop up appears click '**Okay**'. This will download and open the data in Excel.



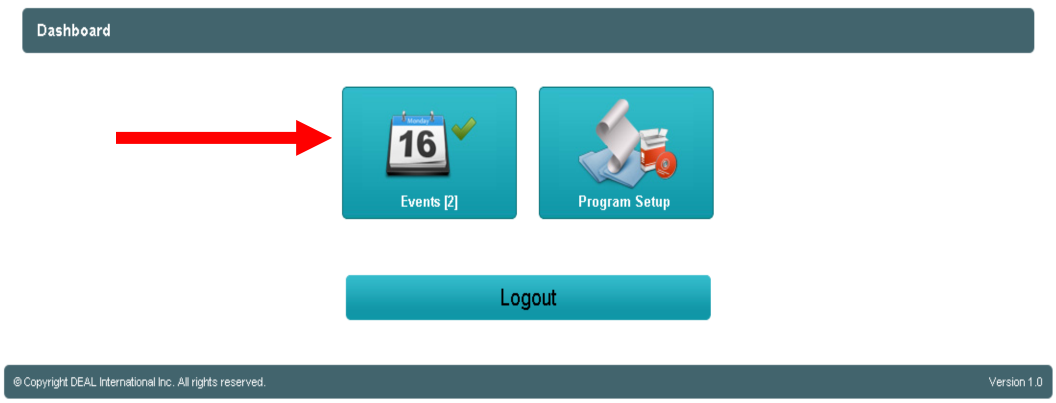
7. When Excel loads it will display all the data for that tradeshow.
8. Once in Excel you can organize the data in many fashions by applying the **'Filter**' tool to the worksheet.
    a. To apply this functionality navigate to the '**Data**' tab and click on the '**Filter**' icon.
    b. Now, if for example, you want to sort the worksheet by the 'Account Owner' you can click the on the arrow next to the 'Account Owner' title in row A and select 'Sort from A to Z'. This arranges the worksheet by account owner in alphabetical order.



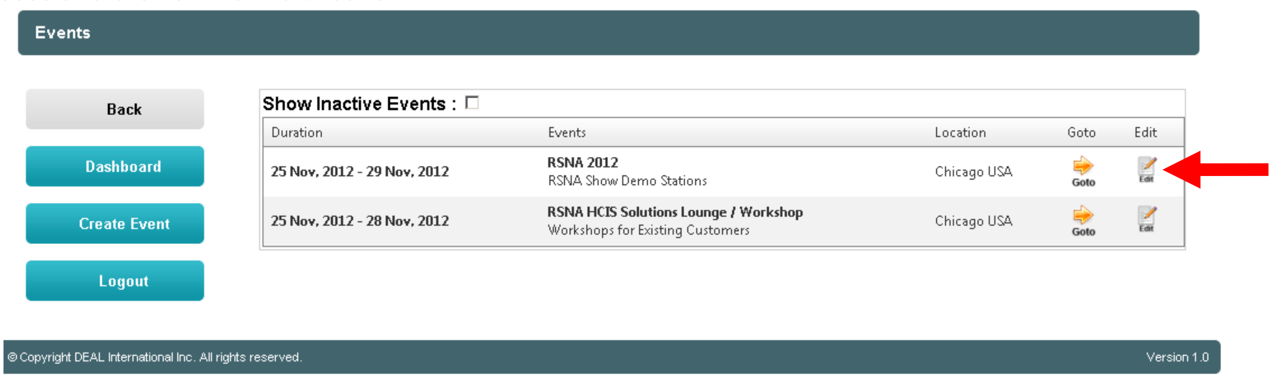
For Administrators and Event Managers: How to Set up Event Team Members

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.

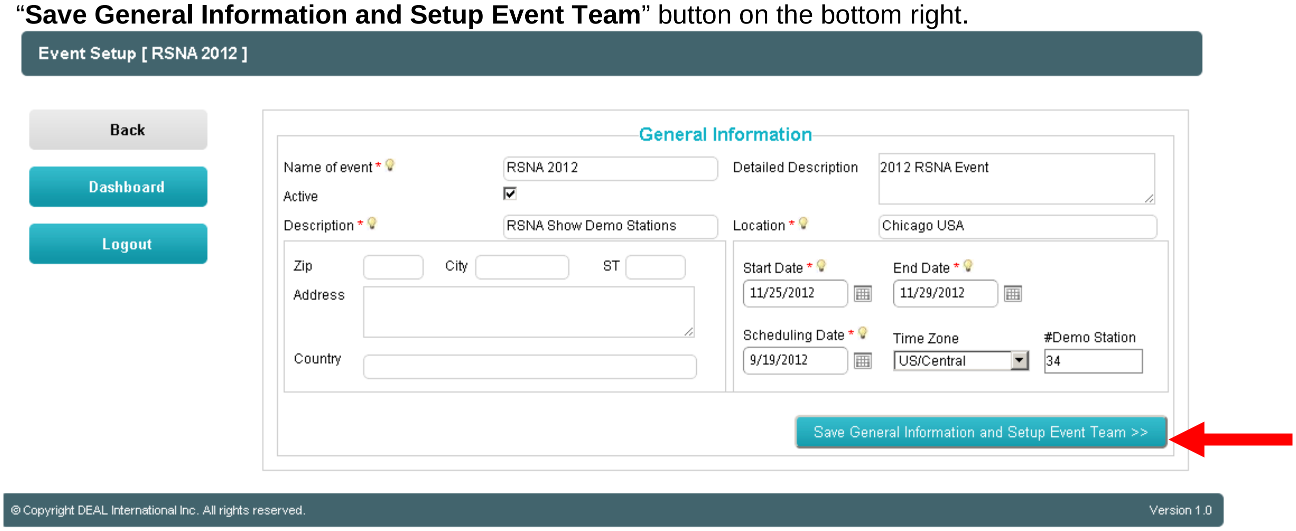
2. Click the ‘**Events**’ button on the dashboard to set up team members for an event.
   - “Team members” constitute all people that will need to use the scheduling system to book demo appointments for a particular trade show.
   - At any time, you can click on the “Back” button, to go to the previous screen, or you can click on “Dashboard” to take you back to the Event screen.



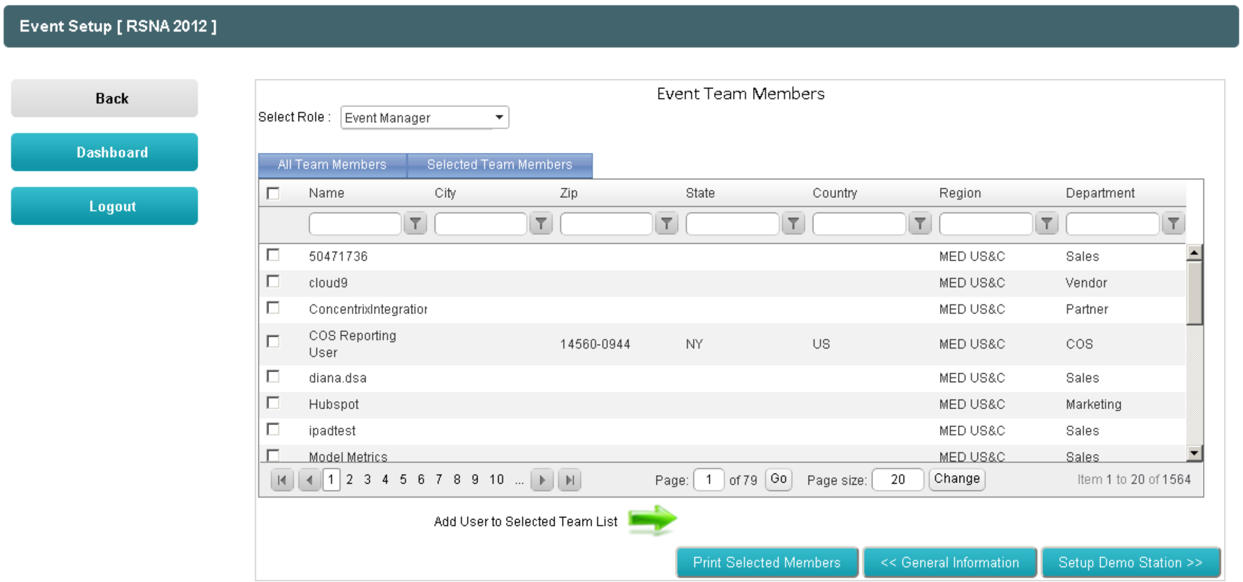
3. After clicking on the “Events” button, you will be taken to the screen below. Find the Event name you need to access and click on the “**Edit**” button.



4. You are now taken to the Event Setup Screen (shown below) that displays details of your event. Click on the “**Save General Information and Setup Event Team**” button on the bottom right.

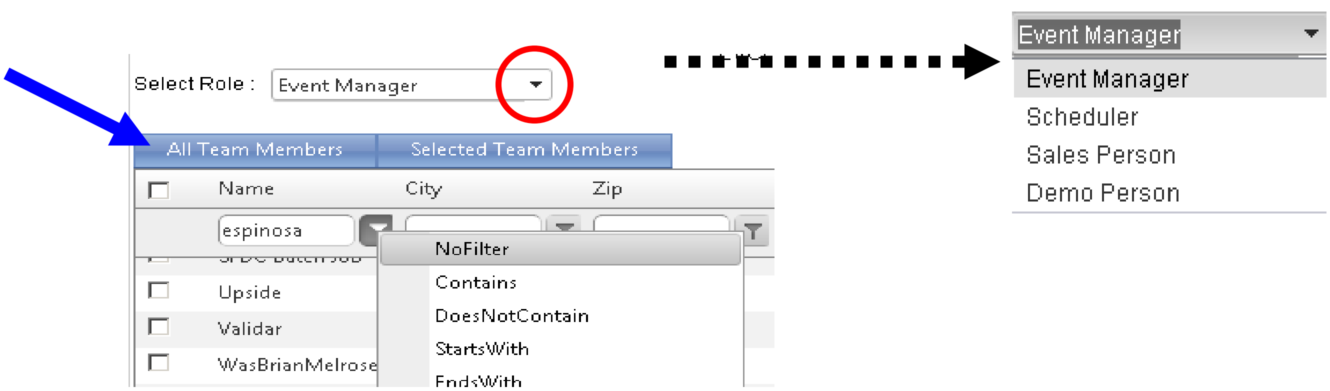


5. You are now in the "**Event Team Members**" section. Here, you will add the appropriate people to your event as team members. **However, before you do so you first need to decide on what "permission levels" you want to give the various members of the team.**



<u>Follow these steps to add event team members:</u>

a) When granting permission, first click on the '**All Team Members'** button (**<u>blue</u>** arrow below); then click on the down arrow (circled in **red**) in the '**Select Role**' field. This will expose the names of the different permission types (shown adjacent to "dotted" **<u>black</u>** arrow): Event Manager, Scheduler, Sales Person, Demo Person. Select the permission you want to grant. Permission Level definitions are shown below.



<u>Permission Levels</u>:

- <u>Administrator</u> – Has the rights to create new events, grant permission levels, and add new people that are not in the 'Universe'. The 'Universe' is defined as those employees and names that are preloaded into the system from Salesforce.com. If you cannot find a name in the system, you will need to add that person as a new user to the Universe.
- <u>Event Manager</u> – Can essentially do everything Administrators can, except create new events.
- <u>Scheduler</u> – Can schedule demo stations for themselves and other people.
- <u>Demo Person</u> – Can schedule demonstrations for them only.
- <u>Sales Person</u> – Can schedule demo stations for themselves and view information.
- <u>Basic Login</u> – When a user is originally added into the system they are defaulted to 'Basic Login'. This role provides 'View only' access to the user. They cannot add, delete, or edit any information within the system.

b) Granting Permission to One or a Few People:

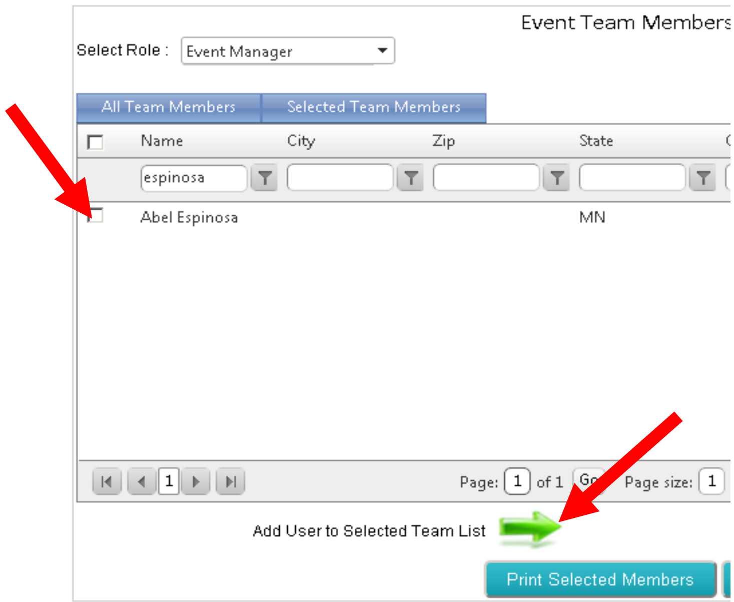
a. In the name field, type in part of the first or last name of the person you wish to search for.

b. Then select the Filter icon ( ) and select "**contains**" to perform the search, shown in step a above.

If the person is in the system, you will see him/her listed (see illustration below).

Click on the white check box adjacent to the person's name to select the person. Then click on the Green Arrow which says '**Add user to Selected Team List**' (Add User to Selected Team List).

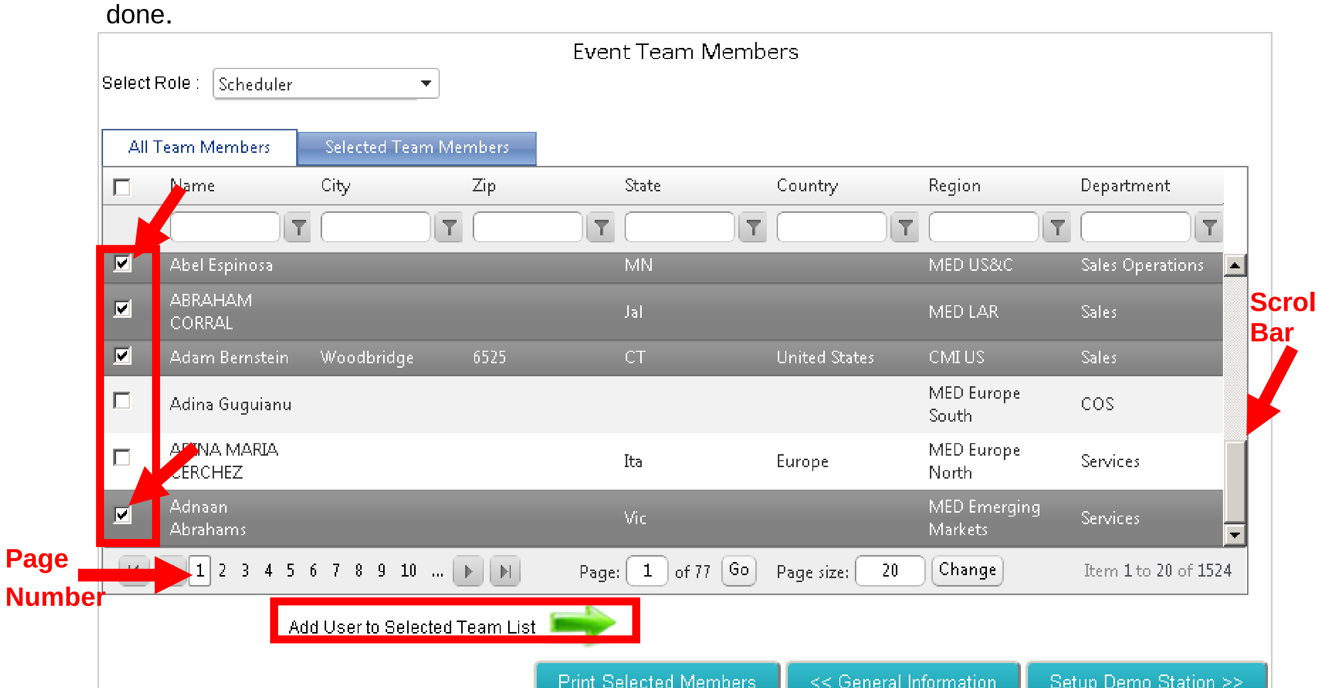
You will see that person's name disappear from the window below. This means they have been added to your event at the permission level you selected.



c. Granting Permission Level to Many People:

This can be done by clicking on the white check box before each name you want to assign that role to. The person's name will be highlighted in gray when selected. This process needs to be done for each page. Make sure you scroll from top to bottom on each page.

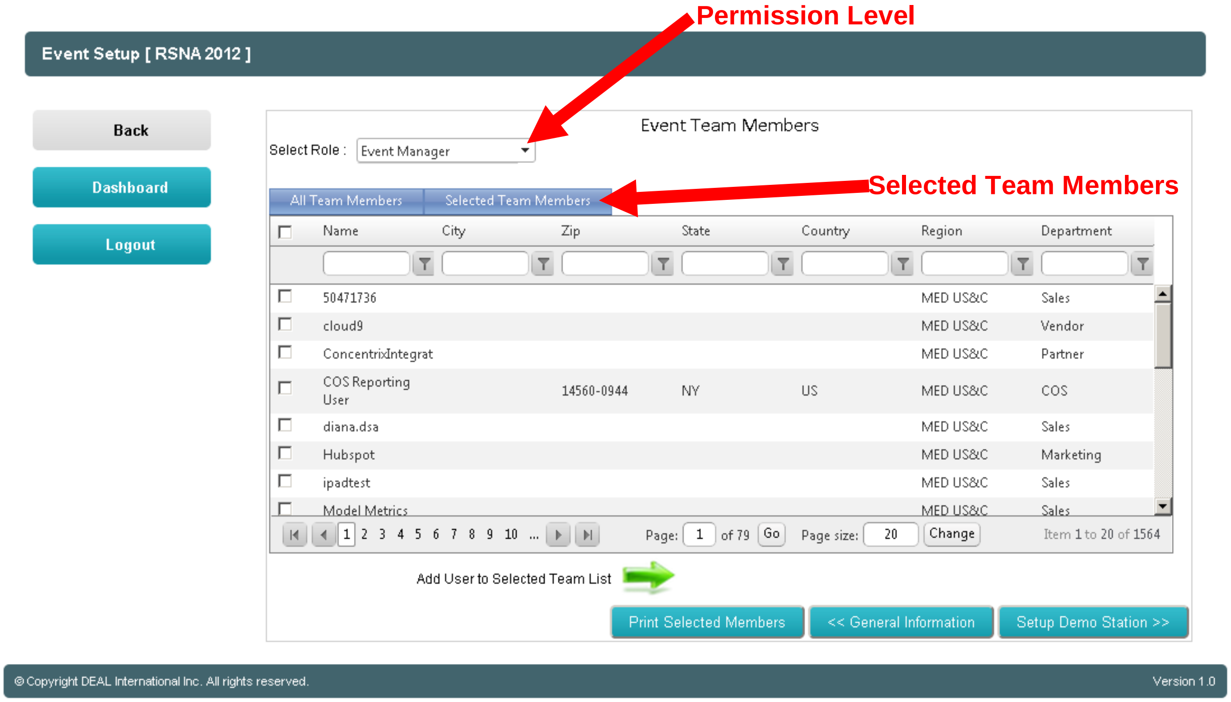
Once all the individuals are selected for that role, click on the green arrow next to the content '**Add User to Selected Team List**'. The people marked are removed from the 'All Team Members' list and added to the permission level list you selected. Repeat the steps above on each page until you are done.



d. <u>Confirm Permission Levels</u>:

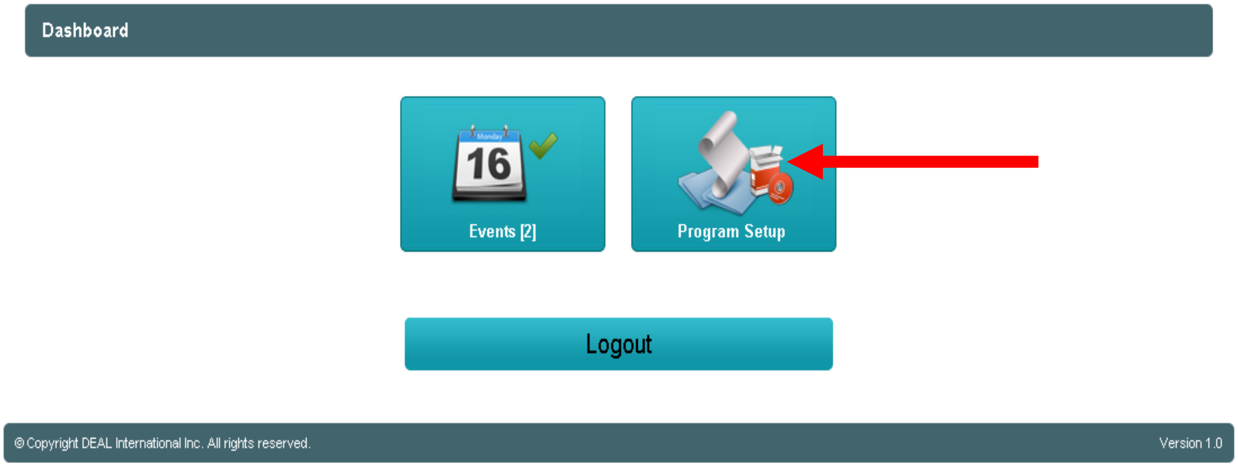
If you want to confirm who has a certain level of permission, you can select the permission level and then click on the '**Selected Team Members**' tab.

If there is more than one page, you will need to review each page to see who is listed. All names are listed alphabetically.

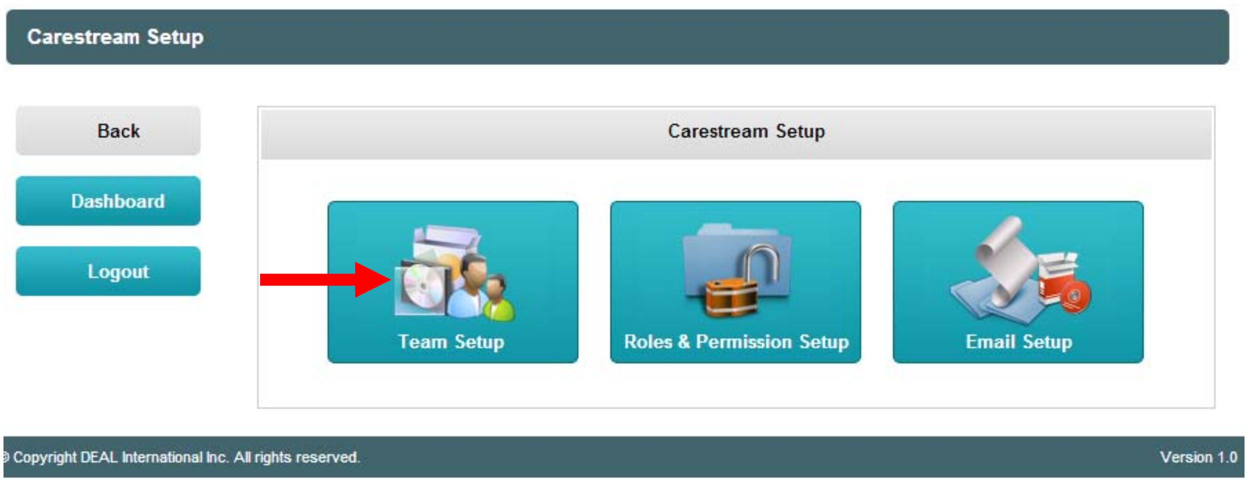


For Administrators: How to Add a User to the Universe

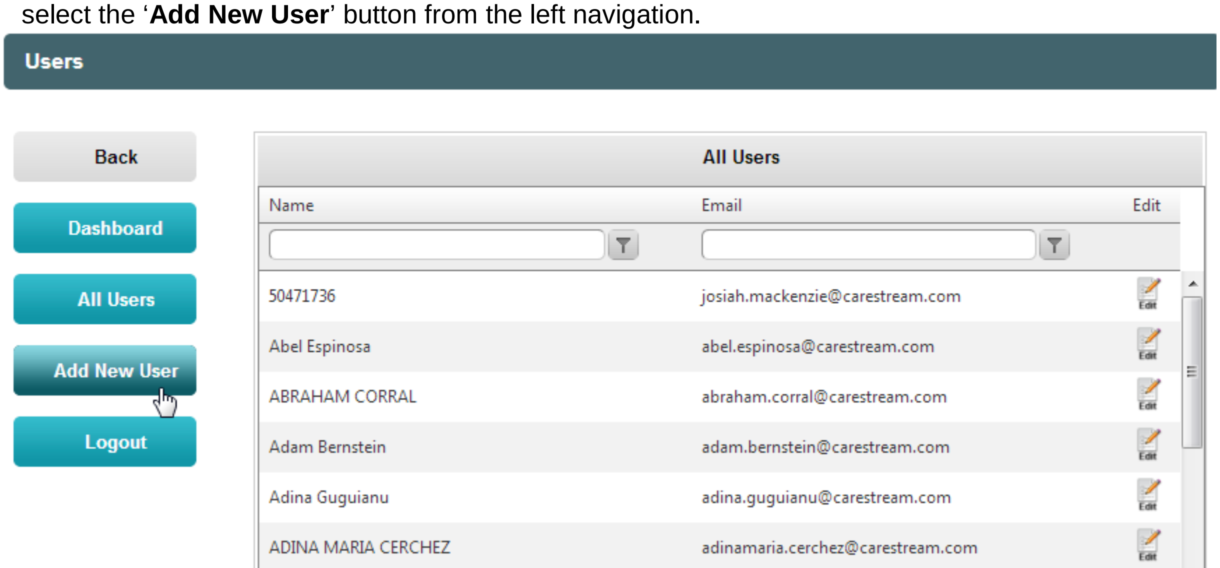
1. Log into the Online Demo Scheduling Tool (See instructions: "How to Log into the Online Demo Scheduling Tool"). User name = Carestream email address, Password = Global ID.
2. From dashboard click the **Program Setup'** icon.



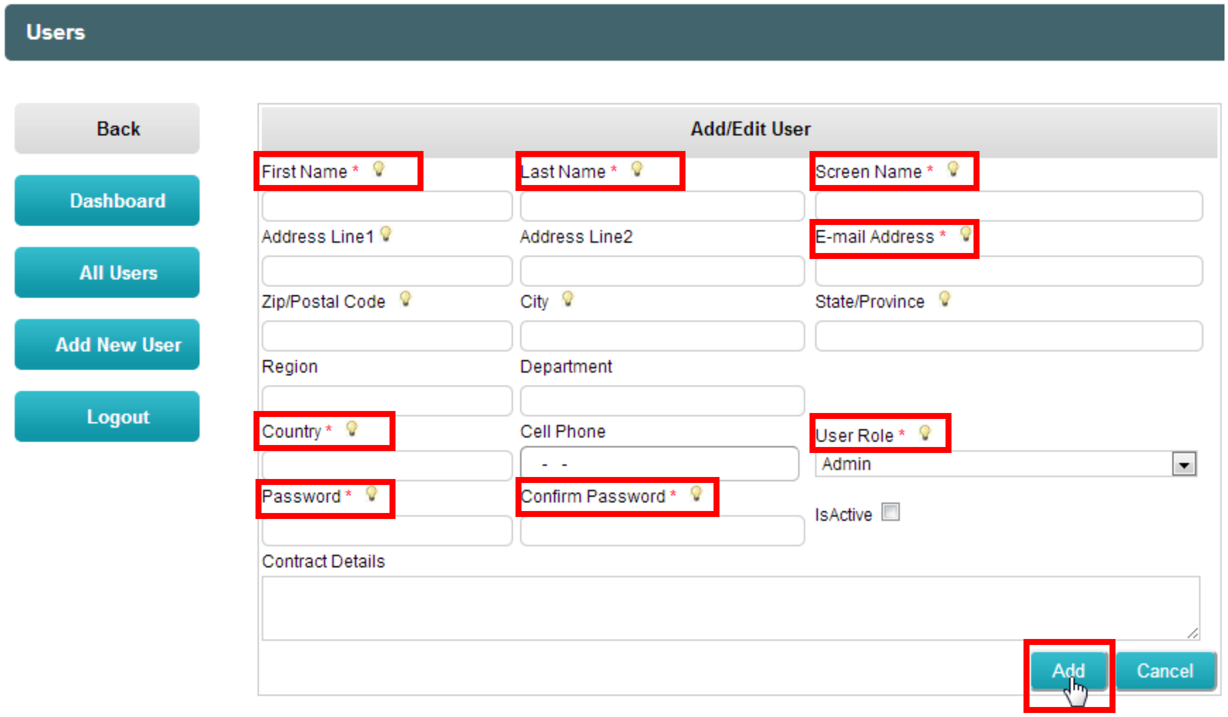
3. From the Carestream Setup section, select the '**Team Setup**' icon.



4. The '**Users'** section shows you all the users in the Carestream Universe. To add a user to the universe, select the '**Add New User**' button from the left navigation.



5. Fill in all the appropriate information on the '**Add/Edit User**' form.



The following fields are **required**:

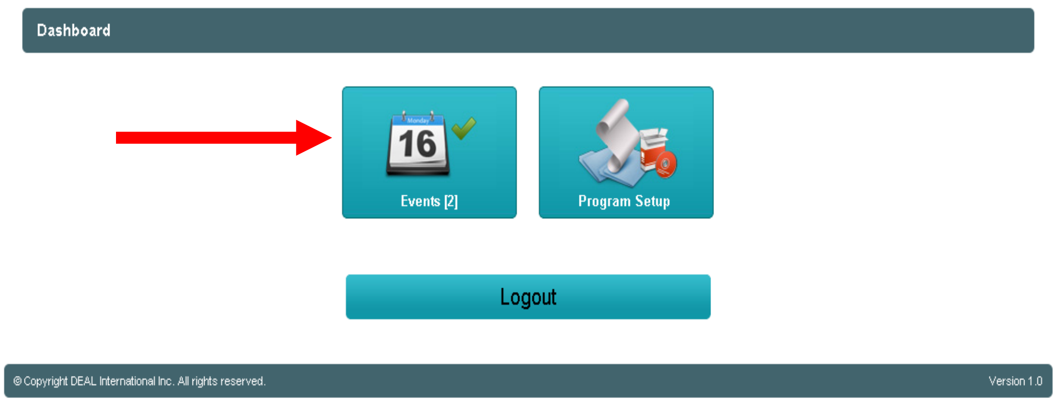
a. First Name
b. Last Name
c. Screen Name (First Name + Last Name, Title Case)
d. Email Address
e. Country
f. User Role – All Users are added in as 'Basic Login' unless identified otherwise
g. Password – we use our Global IDs as passwords
h. Confirm Password – we use our Global IDs as passwords

6. When you are done, click '**Add**'. The user has now been added to the Universe.

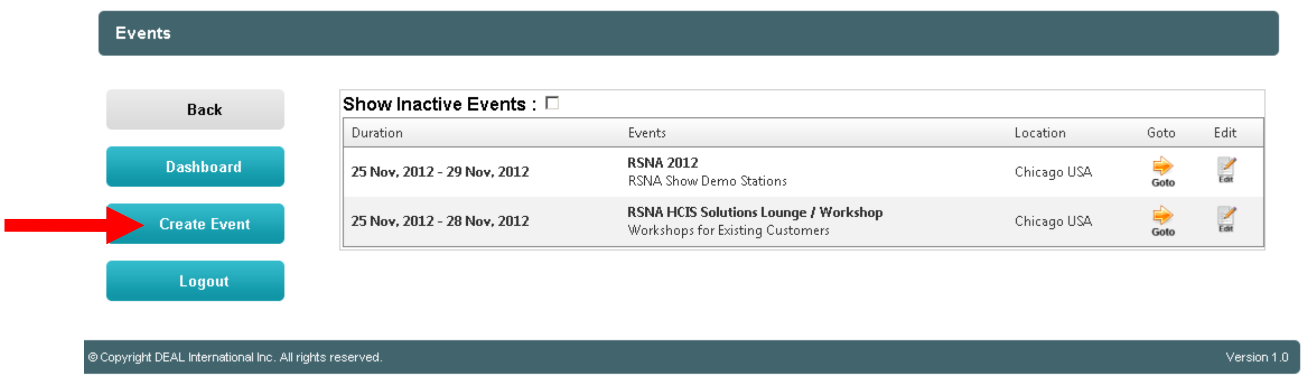
For Administrators: How to Create an Event

1. Log into the Online Demo Scheduling Tool (See instructions: "How to Log into the Online Demo Scheduling Tool"). User name = Carestream email address, Password = Global ID.

2. Click the '**Events**' button on the dashboard. At any time, you can click on the "Back" button, to go to the previous screen, or you can click on "Dashboard" to take you back to the Event screen.

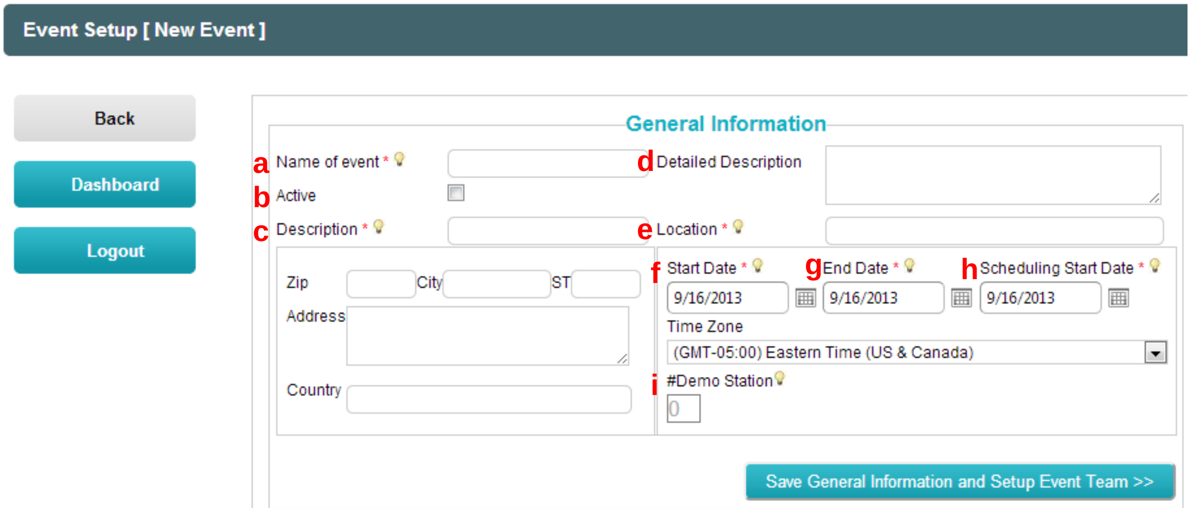


3. From the left navigation choose the 'Create Event' button.



4. You are first taken to the '**General Information**' section. Please complete all required fields and all additional fields to the best of your ability. Refer to screen shot on next page.
   a. **Name of Event** – Required. Enter the name of the event you are creating (i.e. Arab Health 2013 or RSNA 2013). Keep it simple.
   b. **Active** – Check this box if you want the event to be visible. If the event is in the future, leave this unchecked until you want to make it visible in the system.
   c. **Description** – Required. Enter a description of the event. This appears under the event title in the main listing of events.
   d. **Detailed Description** – Enter any additional details for this event here.
   e. **Location** – Required. Enter the location of where the event is being held. (i.e. Chicago, IL or Palais des Congrès, Paris, France)
   f. **Start Date** – Required. Enter the date in which the event begins.
   g. **End Date** – Required. Enter the date in which the event ends.
   h. **Scheduled Start Date** – Required. Enter the date in which you would like users to be able to begin scheduling appointments. This date would occur before the event Start Date.

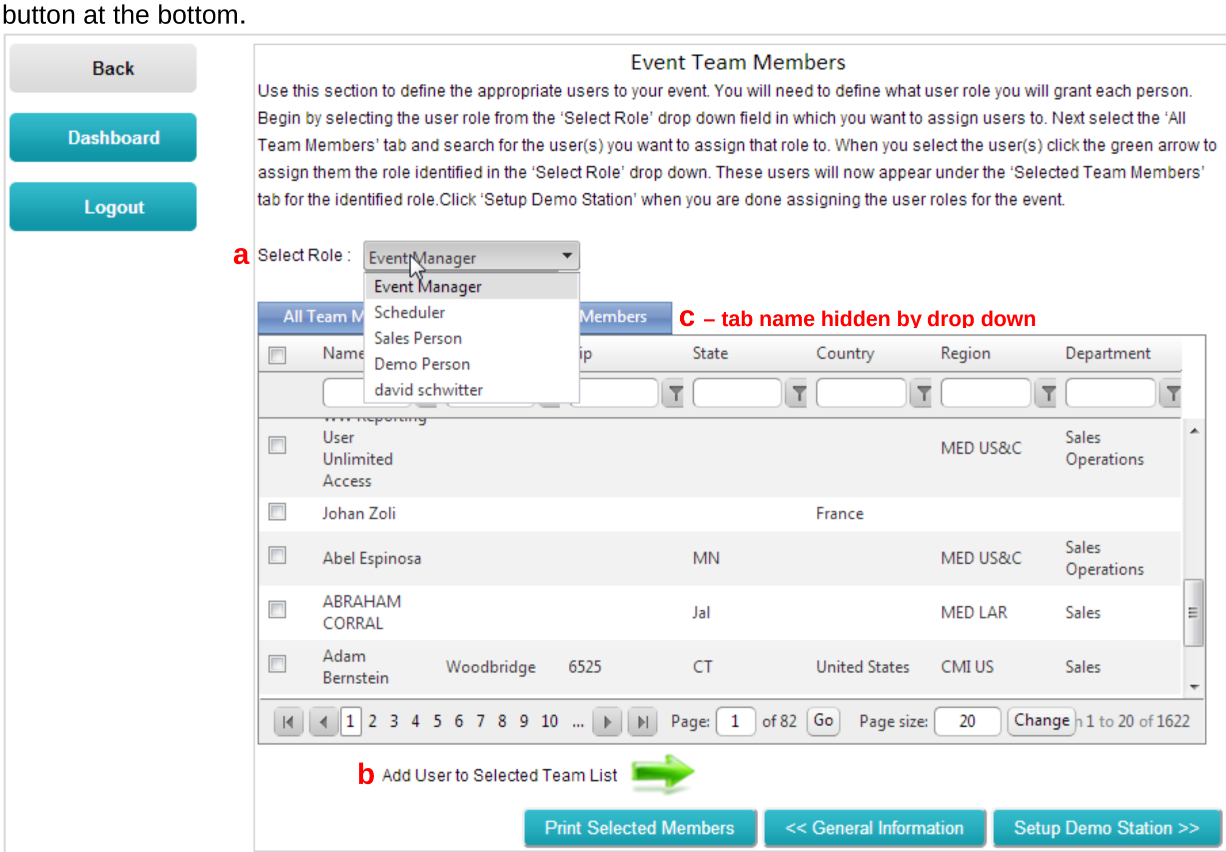
i. **#Demo Station** – This field is for information only. It counts the total number of demo stations that are created for the event.



5. Once the general information is completed click the 'Save **General Information and Setup Event Team >>**' button.

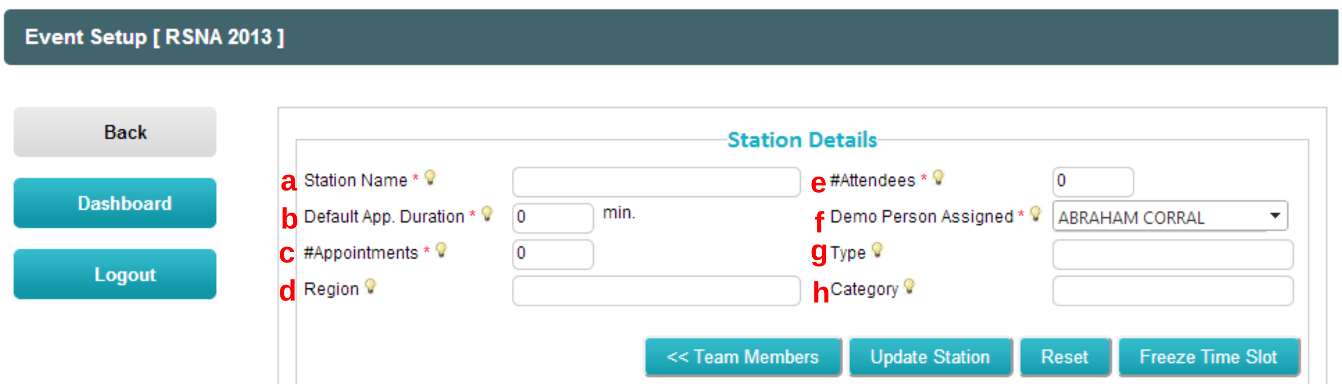
6. You are now taken to the **'Event Team Members'** section.
   a. Find the people who will be assigned to this event by first selecting the role in which you want to assign from the '**Select Role**' drop down. Once the page reloads, select the names of the individuals in the list you want to assign that role to by clicking the check box to the left of their name.
   b. After you have checked the box of the individuals, click the green arrow ( ) that says '**Add User to Selected Team List**'.
   c. Review the individuals you have added to the role identified from the 'Select Role' drop down by clicking on the '**Selected Team Members**' tab. If you added someone by mistake select the check box next to their name and click the green arrow that says "**Move to All Team Member List**".

From here you can also print a copy of the selected members by clicking the '**Print Selected Members**' button at the bottom.

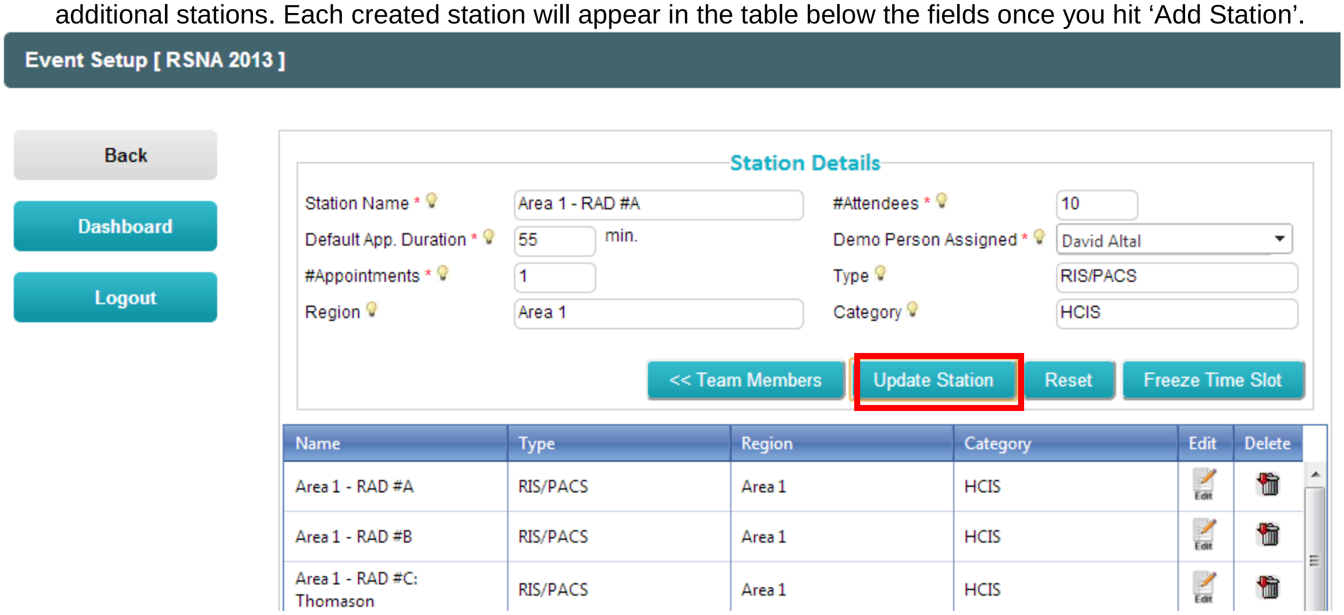


7. When you have finished selecting all the event members, click the '**Setup Demo Station >>**' button at the bottom of the 'Event Team Members' section.

8. In this section you will create the Demo Stations needed for your event.
   a. **Station Name** – Required. Enter the name you want to call the demo station. Use a consistent naming convention to organize the list (i.e. POD 1 - PACS, POD 2 - Mini-Théâtre).
   b. **Default App. Duration** – Required. Enter the length of time in which each demonstration lasts (i.e. 15 minutes, 30 minutes, etc.)
   c. **# Appointments** – Required. Enter how many appointments can be scheduled per the length of time you listed in "Default App Duration."
   d. **Region** – Enter the Region for the station, or leave blank. This is used for filtering when booking appointments.
   e. **#Attendees** – Required. Enter the total capacity or number of people who can physically fit in the demo area -usually 10.
   f. **Demo Person Assigned** – Required. Select from the drop down the person who will be doing the demonstration for this station. The list is populated by those defined in the 'Team Members List' as being demonstrators.
   g. **Type** – Enter a value for the type of station this is, like RIS/PACS, MyVue, Vue Motion or Elite CR. This is used for filtering when booking appointments.
   h. **Category** – Enter the product category for the station like HCIS, MAMMO, X-Ray Solutions, etc. This is used for filtering when booking appointments.

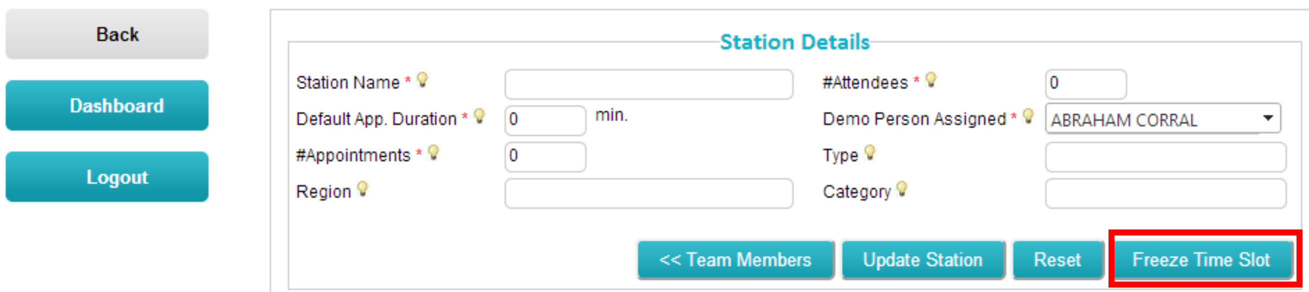


9. When you have completed the fields for the first station select the '**Add Station**' button. You will receive a confirmation pop up when the station is created. Click '**Ok**' to return to the Station Details screen to add additional stations. Each created station will appear in the table below the fields once you hit 'Add Station'.

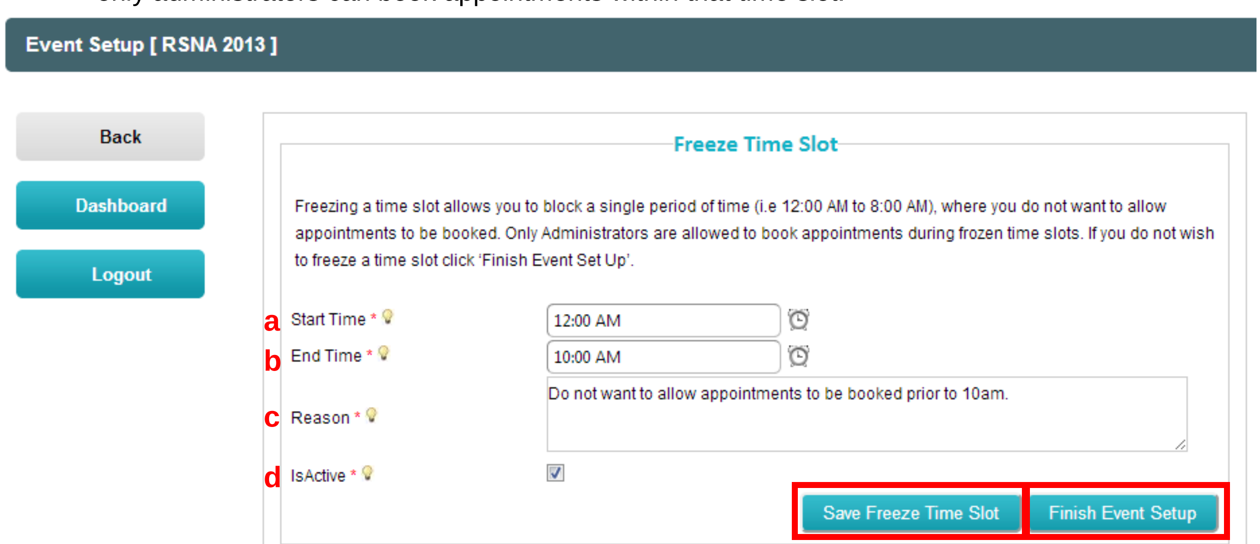


10. Repeat steps 8 and 9 until all stations have been added. If you need to edit a station, click the '**Edit**' icon () to the right of the station name. If you need to delete a station, click the '**Delete**' () icon to the right of the station you want to remove.

11. Once you have added all stations needed for the event, click the '**Freeze Time Slot**' Button.



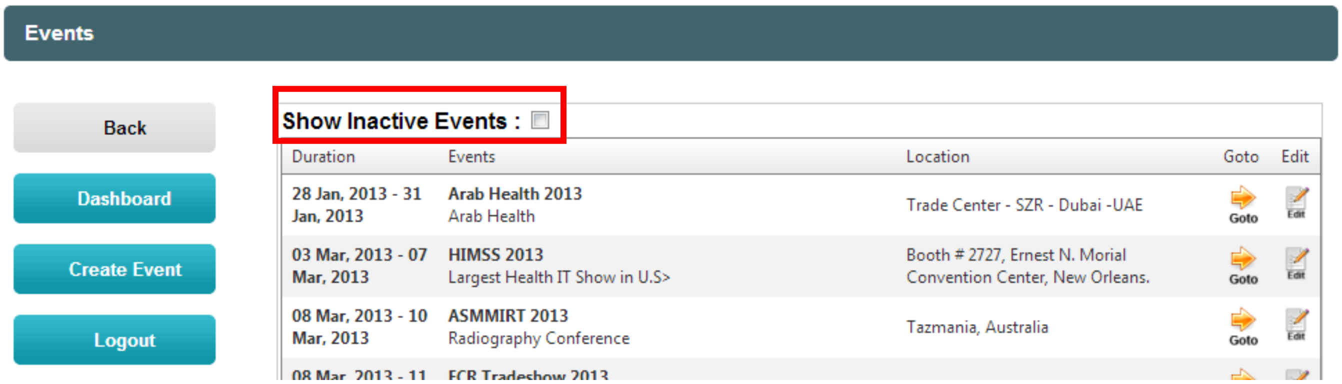
12. The '**Freeze Time Slots**' section allows you to block a single period of time (i.e 12:00 AM to 8:00 AM), where you do not want to allow appointments to be booked. Only Administrators are allowed to book appointments during frozen time slots. If you do not wish to freeze a time slot click '**Finish Event Setup**'.
    a. **Start Time** – Required. Enter the time of day in which you want the freeze to begin (i.e. 12:00 AM).
    b. **End Time** – Required. Enter the time of day in which you want the freeze to end (i.e. 8:00 AM).
    c. **Reason** – Required. Enter a reason for why you are freezing this time slot (i.e. Show does not start until 9:00 AM.)
    d. **IsActive** – Required. Checking this box indicates that the time slot identified above is turned on and only administrators can book appointments within that time slot.



13. Once the fields are complete click the '**Save Freeze Time Slot**' button. Click '**Ok**' when you receive the confirmation pop up window. You are now redirected to the beginning at the 'General Information' section.
    At this point your event has been created.

14. If you need to go back into your event to edit any details you can step through this process again, or you can click on the ‘**Dashboard**’ button to the right and see if your event shows up in the listing.

    Note: if your event is not set as ‘Active’ (from step 4) you will need to check the ‘**Show Inactive Events**’ box at the top of the table.



Frequently Asked Questions

Question: What to do when people can't log onto the System?

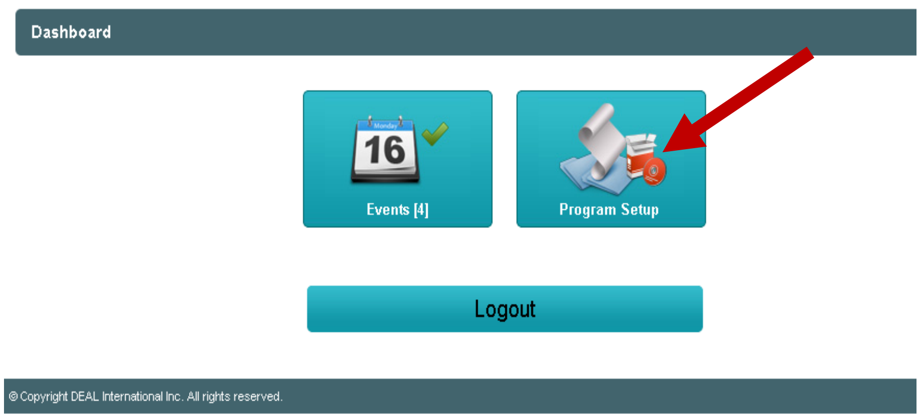
Answer:
Please contact one of the system administrators. Troubleshooting this question can only be performed by users with Administrator level permissions. Carestream trade show managers should have this permission level. Contact Stacy Brien (stacy.brien@carestream.com) if you need any further assistance.

If you do have the above permissions, here are instructions for troubleshooting the most common log in issues:

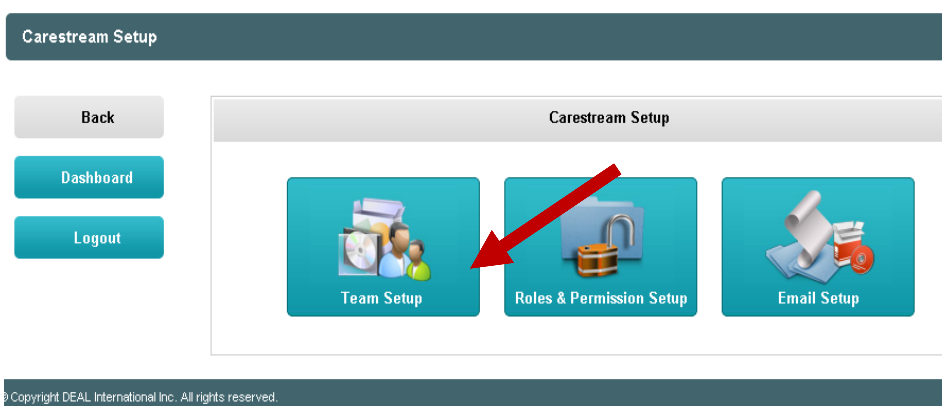
A. If someone cannot log onto the Online Demo-Scheduling System

First, look up the person's external email address and Global ID and try logging on as him or her. If you are unable to do so, use this procedure:

1. Log on to the System with your own email address and Global ID.
2. Select Program Setup



3. Select Team Setup

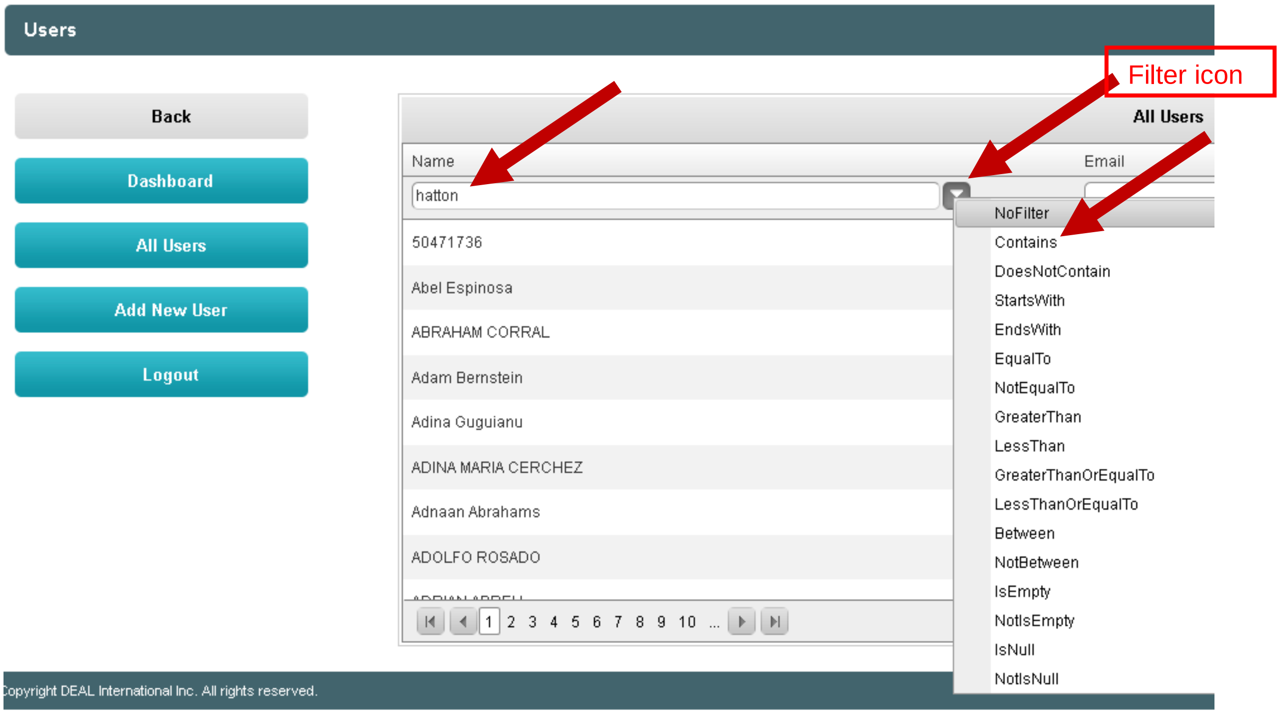


4. Put the last name of the person you want to check (i.e., the person who can't log into the system) in the name field shown below.

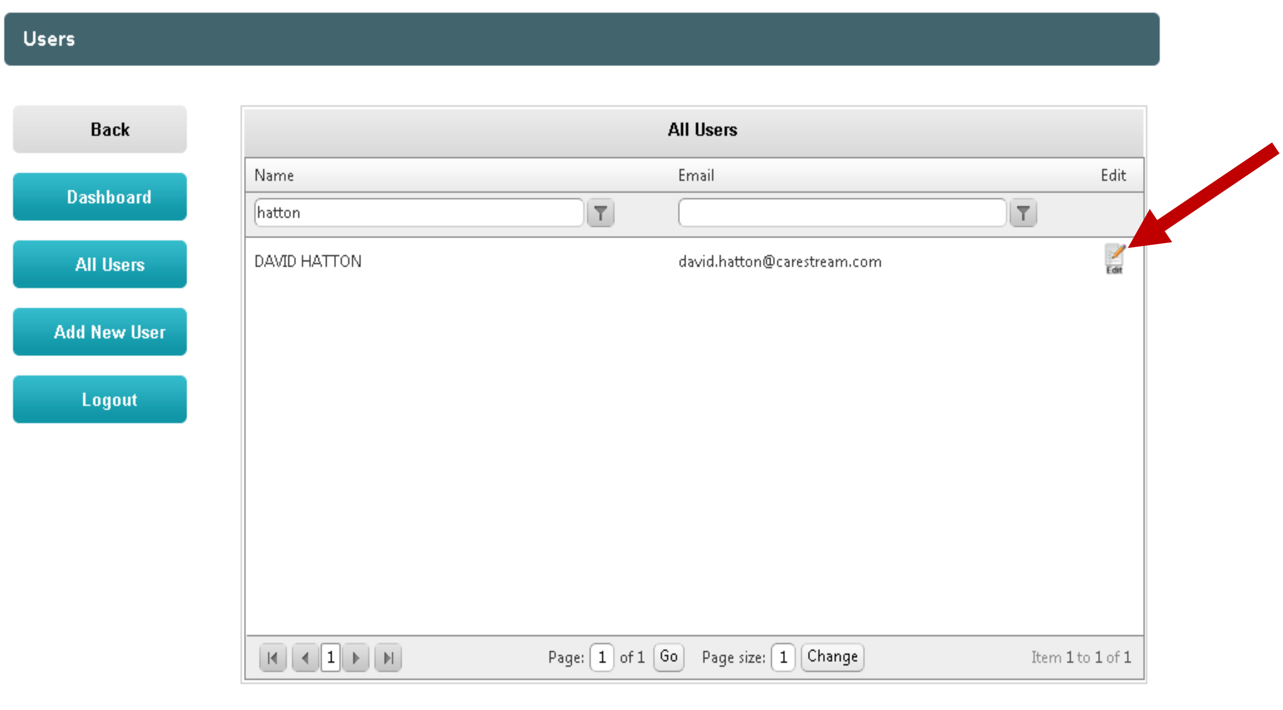
   Then click on the filter icon and select the word "contains" to search for that person.

   If the person cannot be found, you know you need to add them to the database of names in the system (called the "Universe"). To add a person to the Universe, see Page 19, of this User Guide, "For Administrators: How to Add a User to the Universe".

   Otherwise, proceed to Step 5 below.

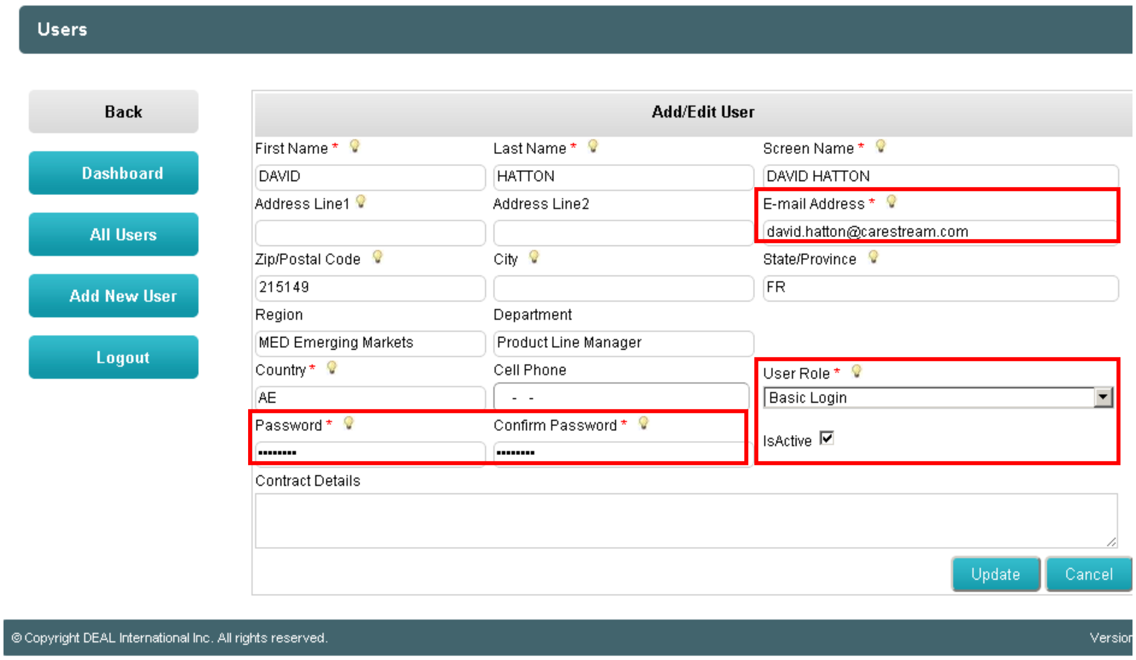


5. Once the system finds the person, click on the "Edit" button to open that person's profile.



6. The User's profile screen now appears.
   Ensure the following information is accurate: the User email address is correct, the User Role states "Basic Login," the User is listed as "Active," and his/her Password is correct.
   Remember, a person's Global ID serves as his/her Password. Since you cannot see the Password, re-enter the person's Global ID in the "Password" field, and in the "Confirm Password" field.
   Then click on the "Update" button to make sure the person's User profile is updated.

   Note: When an individual's User Role is "Basic Login" they merely have access to view the system.



7. To verify everything is working properly, log off, and then try logging back on as that User. If log on is successful, everything is okay.

B. If someone can log onto the System, but cannot see the Tradeshow Event

If a person can log onto the Online Demo Scheduling System, but cannot see the Tradeshow event, this means that the person has 'Basic Login' to the System and has NOT been granted any level of permissions. This means you need to grant a permission level such as 'Scheduler', 'Sales Person' or 'Demo Person'.

This is easy to do:
In the **User's profile screen**, click on the down arrow in the **User Role** field and select the appropriate permission level, then click on the 'Update' button to update the person's User Role.