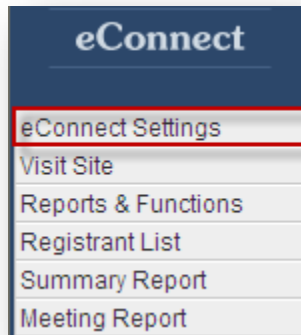


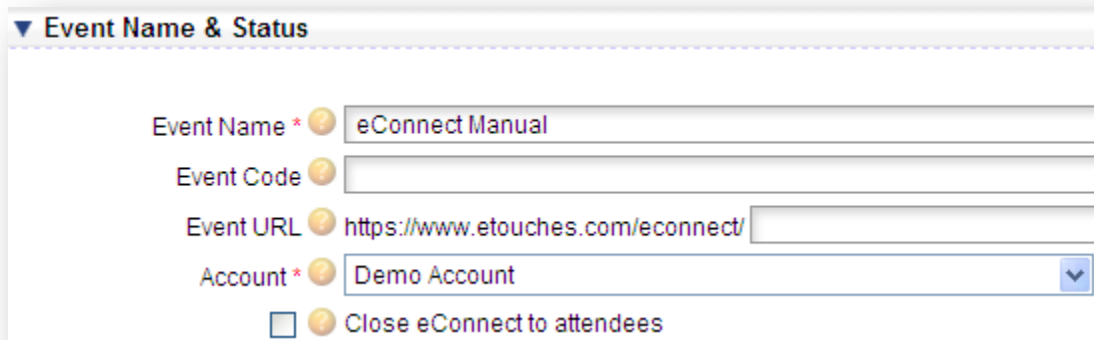
eConnect Manual

eConnect: The eConnect module allows you and your colleagues to manage meetings online and setup meetings with other users.



Basic Details: In the Basic details section you can edit the basic details about your event such as name & status, Schedule Date & Hours, and Available Meeting Locations.

Event Name & Status:

A screenshot of the 'Event Name & Status' form. The form has a title bar with a dropdown arrow and the text 'Event Name & Status'. Below the title bar are several input fields: 'Event Name *' with a yellow question mark icon and the value 'eConnect Manual'; 'Event Code' with a yellow question mark icon and an empty field; 'Event URL' with a yellow question mark icon and the value 'https://www.etches.com/econnect/'; and 'Account *' with a yellow question mark icon and a dropdown menu showing 'Demo Account'. At the bottom of the form is a checkbox with a yellow question mark icon and the text 'Close eConnect to attendees'.

Event Name: This is the name of your event as it will appear on the back end of the system when you are editing it.

Event Code: This is the reference code that you can assign to your event. This has no real bearing on registration, it is just there for internal purpose only.

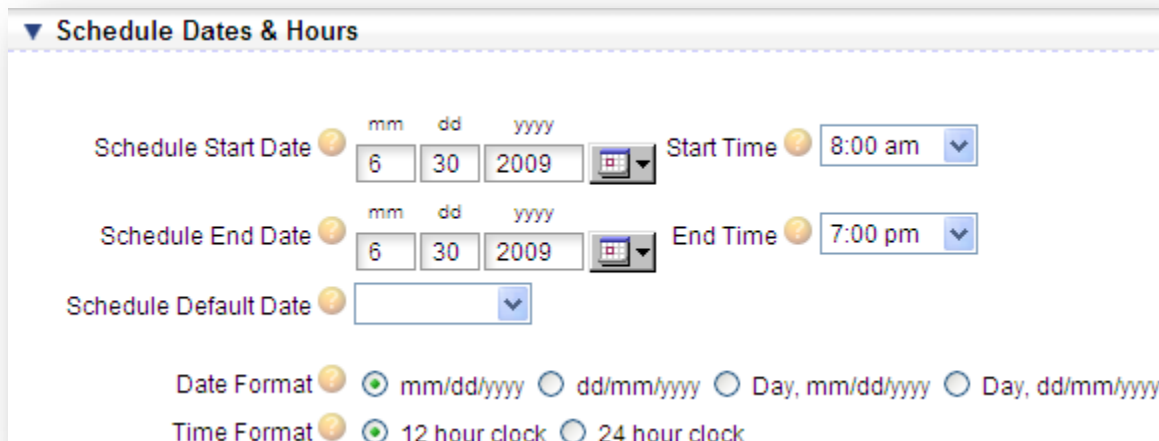
Event URL: By default the link to your event will consist of the event ID number that the system assigned when you created your event. However if you would prefer to have a more relevant

URL to give attendees, then enter the desired URL here. Please note your URL will always begin with [.etouches](#).





Account: This is the account in which the event is placed. The account determines who has access to the event.





Close eConnect to attendees: Checking this box closes eConnect to your attendees, ensuring that no-body can login to the system.



Schedule Date & Hours:





▼ Schedule Dates & Hours

Schedule Start Date  mm dd yyyy
6 30 2009  Start Time  8:00 am 

Schedule End Date  mm dd yyyy
6 30 2009  End Time  7:00 pm 

Schedule Default Date  

Date Format  ☒ mm/dd/yyyy ☐ dd/mm/yyyy ☐ Day, mm/dd/yyyy ☐ Day, dd/mm/yyyy

Time Format  ☒ 12 hour clock ☐ 24 hour clock

Schedule Start Date & Time: This is the earliest date & time that your registrants can view on their eConnect Schedule.

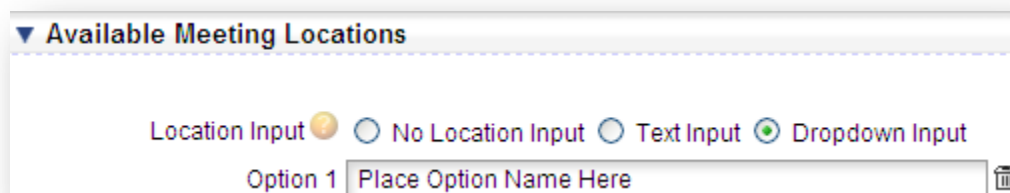
Schedule End Date & Time: This is the latest date & time that your registrants can view on their eConnect Schedule.

Schedule Default Date: This is the date that your registrants will see when they initially log in to their eConnect schedule. If this field is left blank it will default to the schedule start date.


Date Format: Select whether your event dates will appear to registrants in US or European format.


Time Format: Select whether your event times will appear to registrants in 12 hour or 24 hour format.

Available Meeting Locations:



▼ Available Meeting Locations

Location Input  ☐ No Location Input ☐ Text Input ☒ Dropdown Input










Option 1 

Location Input: Select if your registrants can enter a location when creating a meeting request, and if so then select the type they can use when choosing as shown above.



Email Templates: In the email templates section you can add eConnect emails that can automatically be sent to registrants. Here you will have three template emails to choose from or you have the option to add more emails.

eConnect Emails:

▼ eConnect Emails					
Email Subject	Email Type	Notes	edit	copy	delete
/eventname/: Meeting Request	Meeting Request Alert				
/connectsubject/	Personal Messages Between Users				
/eventname/: Meeting Cancellation	Meeting Cancellations				
<div>Add Email</div>					

Adding an Email: By clicking this button you will open an email editor in a new window. In this window you will have the ability to edit the general details pertaining to this email as well as the email permissions.

General Details

Email Type Meeting Request Alert

*From (Email)

From (Name)

Subject

Format ☒ HTML & Text ☐ HTML Only ☐ Text Only

HTML Content

Text Content

Notes

[View Merge Fields](#)

Email Type: Select which email template you are creating.

From (Email): Enter the email address of the person you want the email to come from. Remember that people may reply directly to this email, in which case it's best if this is a person who can assist them.

From (Name): Enter the name of the person you want the email to come from.

Subject: Enter the subject line of your email here. Make sure it is obvious what the email refers to otherwise it may well just be deleted by it's recipients.

Format: Use these radio button to select the format of the email: HTML, Text or both. HTML allows you to bold your text, insert images and generally make your email more lively, but on the downside not everyone can receive it, and it is a little more likely to be caught by spam filters. Text emails are functional- they cannot have any formatting other than new lines. Lastly you can send emails in both formats at once, and the user can see whichever version they prefer.

HTML Content: This is where you should insert the HTML version of your email.

Text Content: This is where you should insert the text version of your email.

Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each email template.

View Merge Fields:

Subscriber Merge Fields: If you choose to add a merge field to your email, click the button labeled “View Merge Fields” located at the bottom right of the page. Once you click this button a small window will open that looks like the screen shot below. Locate the merge field that you want to insert into your HTML content. Then highlight it and copy the text. Once you have done this go back to your HTML content and past the text where you want it to appear within your email.

Miscellaneous Merge Fields: The unsubscribe link can be used for one of your recipients to unsubscribe from your mailing list. You can use this if you want to insert the link in another place in your email besides the default link at the end.

▼ Subscriber Merge Fields	
/address1/	Address 1
/address2/	Address 2
/address3/	Address 3
/ccemail/	cc email
/city/	City
/company/	Company
/country/	Country
/email/	Email Address
/ext/	Extension
/fax/	Fax
/fname/	First Name
/lname/	Last Name
/mname/	Middle Name
/mphone/	Mobile Phone
/nonusstate/	Non US State
/prefix/	Prefix
/state/	State
/suffix/	Suffix
/title/	Title
/wphone/	Work Phone
/zip/	Zip Code
▼ Miscellaneous Merge Fields	
/unsubscribe_link/	Unsubscribe Link

Email Permissions: If this box is checked under an email then the email will be sent to all meeting categories. When this is unchecked you’ll see a list of your meeting categories- and you can then choose which of them should receive this email.

▼ Email Permissions	
<input checked="" type="checkbox"/>	Send to all Meeting Categories

Please note that this setting does not apply for messages between attendees - since these don't have a category.

eReg Integration: This section allows you to adjust the integration settings such as login info, and visible registrant information.

Attendees to include in database:

Attendees to include in database

Include based upon attendee category	Include
Include all attendee categories in eConnect database	<input checked="" type="checkbox"/>
Include based upon registration status	Include
Include all registration statuses in eConnect database	<input checked="" type="checkbox"/>

Include based upon attendee category: By checking this box all the attendee categories currently in eReg will be included in your eConnect database. If this box is unchecked then a list of the categories will appear below and you can manually select which categories you would like included.

Include based upon registration status: By checking this box all the attendee status' currently in eReg will be included in your eConnect database. If this box is unchecked then a list of the status' will appear below and you can manually select which status' you would like included.

Login Info/ Confirm Participant:

Login Info/Confirm Participation

Attendees must complete the following information to login to eConnect

Field 1

Field 2

If you want your registrants to confirm that they want to participate in eConnect, select the eReg question and the response that means they will participate.

eConnect Question

Attendee must complete the following information to login to eConnect:

Field One: Users will be required to enter the exact answers they typed when registering in order to login to eConnect.

Field Two: In order to improve eConnect security we recommend you require that your users enter a second piece of information in order to be allowed to login, although this is not compulsory. Users will be required to enter the exact answer they typed when registering in order to login to eConnect.

Confirming registrants will participate in eConnect: Here you will select which question in eReg will determine whether the registrant will appear in eConnect.

Visible Registrant Information:

▼
Visible Registrant Information

Select the eReg fields that should appear or be searchable from various parts of the eConnect site.

Attendee Directory ?	Attendee View Popup ?	Advanced Search ?	Question Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Email Address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other Identifier
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Verify Email Address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prefix (Mr, Mrs, Dr etc)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	First Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Middle Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Last Name

Attendee Directory: Check this box if you would like this field to appear as a column in the attendee directory.







Attendee View Popup: Check this box if you want this information to appear in the popup window when someone clicks on a registrant.

Advanced Search: Check this box if you want this information to be searchable from the advanced search window.

Question Name: This column displays the list of eReg fields that are available to choose from.



Meeting Categories: This section allows you to add/edit meeting categories. These categories are used to group your attendees.


▼ Meeting Categories				
Name	Notes	edit	copy	delete
Category #2				
Category #1				


Add Meeting Category


Add Meeting Category:


General Details:

▼ General Details

Name * 

Description 



Notes 


Name: Enter the name of the meeting category here- this will be visible to registrants. This could be something like “General Meeting” or “Sponsor Meeting.”


Description: Enter a description of this category- your registrants will see this when selecting this meeting type and it will help them to know what it means.


Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each email category.


Category Restrictions/ Permissions:


▼ Category Restrictions/Permissions


Min meeting length 


 minutes

Max meeting length 

 minutes

☒  This meeting category can be arranged on any date/at any time

☒  This meeting category can be CREATED BY anyone

☒  This meeting category can be CREATED WITH anyone

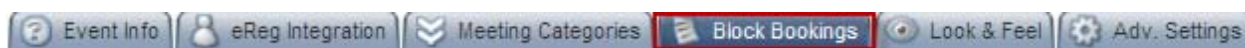
Min Meeting Length: Specify a minimum length in minutes for meeting requests of this category.

Max Meeting Length: Specify a maximum length in minutes for meeting requests of this category.




This Meeting category can be arranged on any date/at any time: Check this box if this meeting category can be arranged on any date or time (within the limits of your schedule)

This meeting category can be CREATED BY anyone: Check this box if this meeting category can be arranged by any attendee categories (from eReg)

This meeting category can be CREATED WITH anyone: Check this box if this meeting category can be arranged by any attendee categories (from eReg)



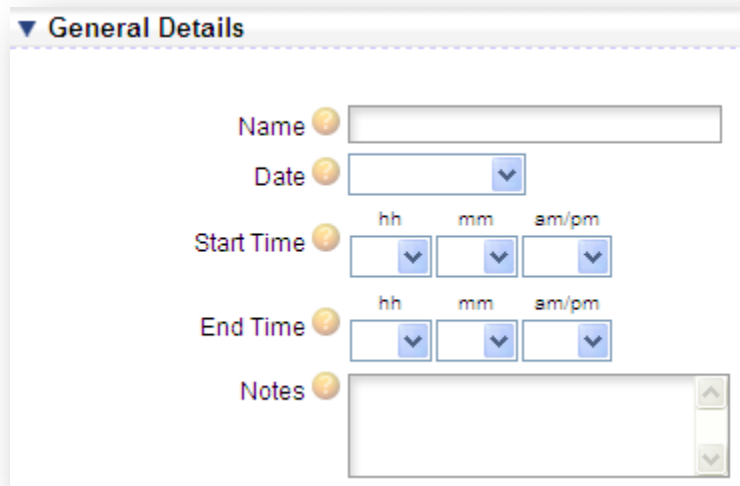
Block Bookings: This section allows you to block out particular times for certain attendee categories. These appointments will appear on the schedule and cannot be edited or deleted by the attendee.

▼ Block Bookings						
Booking Name	Date & Time	Visible	edit	copy	delete	
Lunch	06/09/2010 12:00 pm-1:30 pm	<input checked="" type="checkbox"/>				

Add Block Booking

Add Block Booking:

General Details:



The screenshot shows a form titled "General Details" with a dashed border. It contains the following fields:

- Name:** A text input field with a yellow question mark icon.
- Date:** A date selection dropdown with a yellow question mark icon.
- Start Time:** A time selection dropdown with a yellow question mark icon. It is divided into three parts: "hh" (hours), "mm" (minutes), and "am/pm" (period).
- End Time:** A time selection dropdown with a yellow question mark icon. It is divided into three parts: "hh" (hours), "mm" (minutes), and "am/pm" (period).
- Notes:** A text area with a yellow question mark icon and a vertical scrollbar on the right.

Name: Enter the name of the block booking- this will appear on your registrant's schedule so make sure it's descriptive.

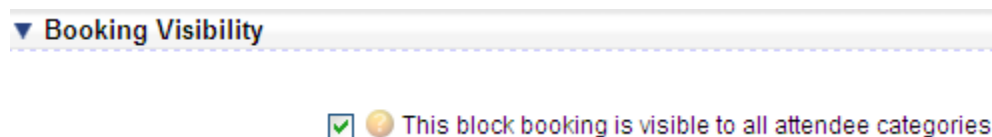
Date: Select the date of this block booking

Start Time: Select the time that this block booking starts

End Time: Select the time that this block booking ends

Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each block booking.

Booking Visibility:

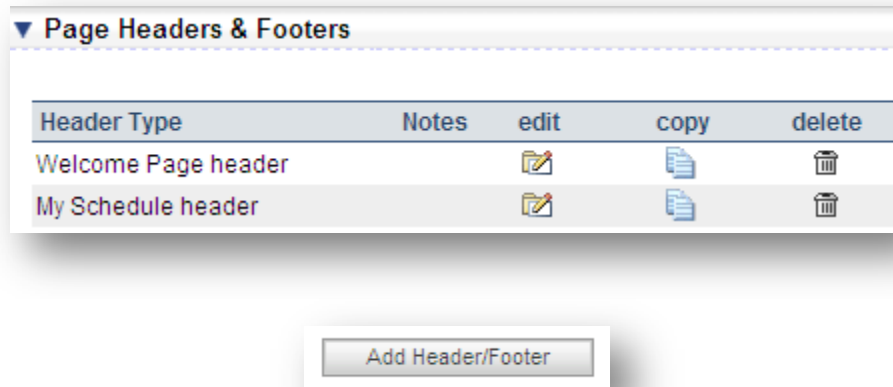


The screenshot shows a section titled "Booking Visibility" with a dashed border. It contains a single checkbox with a yellow question mark icon, which is checked. The text next to the checkbox is "This block booking is visible to all attendee categories".

This block booking is visible to all attendee categories: Check this box if this block booking should be visible to all attendee categories from eReg.



Headers/ Footers: Here you can create headers/ footers for your eConnect site to either give directions, display images, etc.



Add a Header/ Footer: Clicking this button will open a header/ footer editor where you can input the general details of your header/ footer.

General Details

Appears on Welcome Page

Type Page Header

Content

Notes

Appears On: Select which page of your eConnect site you want this message to appear on.

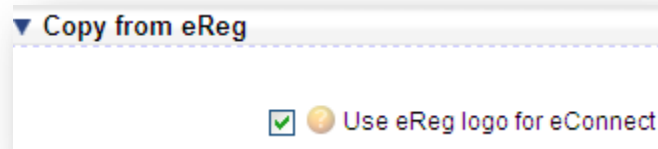
Type: Select if this is a header or a footer. Headers will appear above the rest of the content, footers will appear below.

Content: Enter the content that you want to appear here.

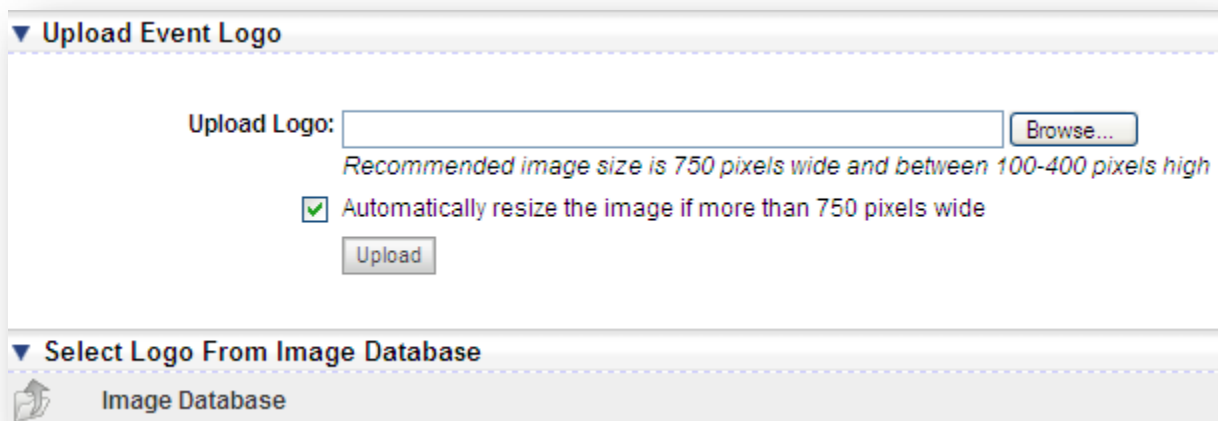
Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each header/ footer.



Event Logo: Here you can use the eReg logo or you can upload a logo for your eConnect site.




Use eReg Logo for eConnect: Check this box if you want to use the same event logo for eConnect that you use for your eReg site. If this box is unchecked you will be able to browse for another logo on your computer or select one from your account's image database as shown in the screen shot below.



Colors & Fonts: In this section you can either choose to use the look and feel from eReg or edit the background page colors and the font styles of your eConnect. Any changes made will be shown in the preview of your eConnect to the right of the page colors.


▼ Copy from eReg


☒  Use eReg colors and fonts for eConnect



Use eReg Colors and Fonts for eConnect: Check this box if you want to use the same colors and fonts for eConnect that you use for your eReg site. If this box is unchecked you will be able to edit the colors and fonts manually as shown in the screen shot below.


▼ Page Colors

Page Background


☐  Solid color

☒  Gradient (one color faded into another)

Fade from this color  to this color 

☐  Background Image

Other Colors

Menu Background Color  [Reset to Default]


Inner Page Color  [Reset to Default]




Table Row Color One  [Reset to Default]

Table Row Color Two  [Reset to Default]

Preview



Page Background: Here you can select from one of three options for your page background; either a solid color, gradient, or upload your own background image.

Other Colors: Here you can adjust the menu background colors, and inner page color. Any unwanted changes can be reset to default by clicking the link to the right of the color.

▼ Fonts

Header Font:		Standard Font:	
Type	Arial	Type	Arial
Size	13 pixels	Size	12 pixels
Color	Black	Color	Black

Fonts: Here you can edit the font type, color, and size of both the header and standard font.



General Settings: In this section you can choose to change the advanced settings for your eConnect site.

▼ Advanced Settings

- ☐ Disable ability for attendees to send messages to each other
- ☐ Hide Total Attendee number in Attendee Directory
- ☐ Do not display Attendee Category as a column in the Attendee Directory
- ☐ Automatically shrink each day of an attendee schedule to fit on a single side of A4
- ☐ Allow attendee categories who are not visible in eConnect to log in
- ☐ Allow attendees who have opted out of eConnect to log in
- ☐ Hide the attendee directory header when returning search results
- ☐ Remove the attendee name everywhere other than confirmed meeting requests.
- ☐ Remove the Request Meeting button.
- ☐ Ignore clashes with eReg schedule.

Meeting length increment: 5

- **Disable ability for attendees to send messages to each other:** This option prevents users from sending messages to each other when logged into eConnect- they can only send meeting requests.
 - **Hide Total attendee number in attendee directory:** This hides the total number of attendees; otherwise they number of attendees will be displayed at the top of the directory page.
 - **Do not display attendee category as a column in the attendee directory:** This will remove the attendee category column from the attendee directory. This is useful if you want to display the dropdown at the top of the page with the attendee category in it, but do not want the category in a column on the page.
 - **Automatically shrink each day of an attendee schedule to fit on a single side of A4:** Checking this will shrink the content of each attendee's schedule so each day fits on a single sheet of A4.
 - **Allow attendee categories who are not visible in eConnect to log in:** Checking this will allow attendee categories who are not visible in eConnect to login and view the other attendees in the directory.
 - **Allow attendees who have opted out of eConnect to log in:** Checking this will allow attendee who have opted out of participating in eConnect to login and view the other attendees in the directory.
 - **Hide the attendee directory header when returned search results:** Checking this will hide your directory header when the page is returned search results. This can be useful if you have a large header that forces people to scroll a long way down the page each time they search.
 - **Remove the attendee name everywhere other than confirmed meeting requests:** This option will automatically remove the attendee name from your eConnect site. The only place that it will be visible is on confirmed meeting requests.
 - **Remove the request meeting button:** This option will automatically remove the meeting button from your eConnect site. Attendees will only be able to use eConnect to send messages.
 - **Ignore clashed with eReg Schedule:** This option will allow attendees to schedule meetings at the same time as sessions booked using eReg. This can be handy if you're using an eReg session to indicate when people are allowed to use eConnect.
 - **Meeting length increment:** This sets the increment in minutes for a meeting length.
-

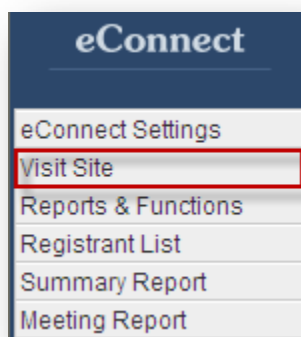


Language & Wording: In this section you can customize the default system text to display differently.

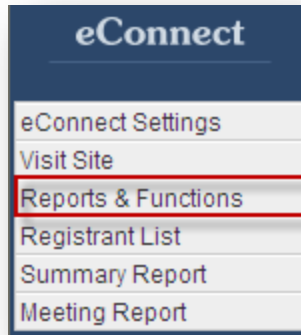
▼ Customize Standard System Text

	Standard Text <i>(red text has been modified)</i>	Login	Schedule	Directory	Attendee View	Send Message	Request Meeting	Advanced Search	Pending Requests	Appointment Editor	Cancel Meeting	Actions
Customize	Accepts Checked Meetings								✓			
Customize	Add Appointment		✓									
Customize	Advanced Search		✓					✓				
Customize	Appointment Details									✓		
Customize	Attach a Message						✓					
Customize	Attendee Details				✓							
Customize	Attendee Directory		✓									
Customize	Attendees Per Page		✓									
Customize	Back									✓	✓	
Customize	Cancel						✓					
Customize	Cancel Meeting										✓	
Customize	Cancel this appointment									✓		
Customize	Change Date:		✓									
Customize	Check Availability						✓					

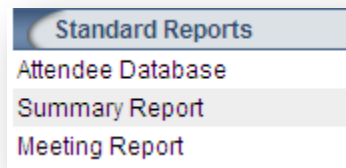
Customize: Click the customize button to change the text. Any text that has been changed will display red. The green checkmarks across the page will display what page that text appears on.



Visit Site: Clicking this option will open your eConnect site in a new window to view. This is the same site that your attendees will access. This feature is useful to view any changes you made or would like to make to your look & feel, as well as setup of eConnect.



Reports & Functions: Clicking this option will display the standard reports as well as functions available to you within the eConnect module.



Standard Reports:

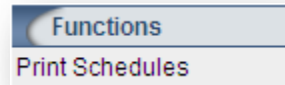
Attendee Database: Clicking this link will display every registration in the eConnect attendee database as well as their information.

Summary Report: Clicking this link will open the summary report that displays the event summary and statistics for each of the days in your schedule as shown below.

Event Summary	
Total Attendees	
Messages sent	0
Total Meeting Requests	9
Confirmed Meeting Requests	3
Rejected Meeting Requests	
Stats For 06/30/2009	
Total Requests	9
Confirmed	3
Rejected	

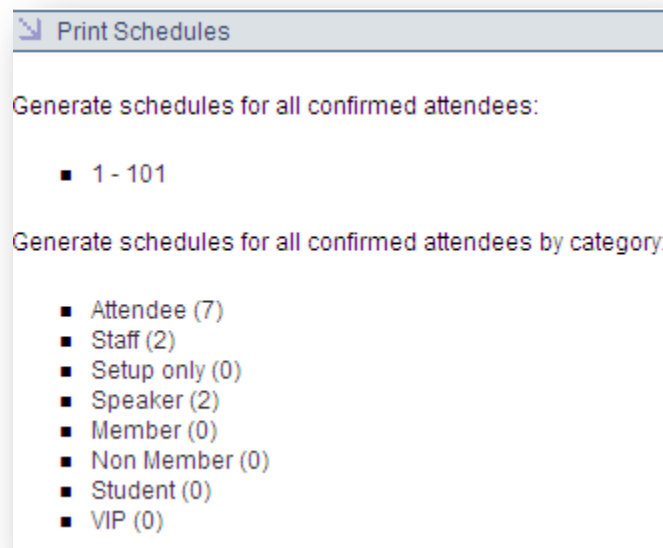
Meeting Report: Clicking this link will open the meeting report as shown below. The meeting report will display all the meetings that have been created as well as who they were arranged by, duration, etc.

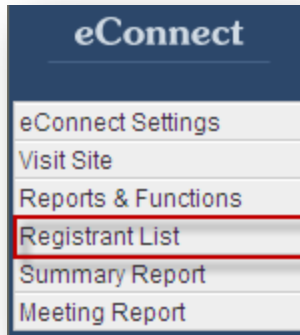
Meeting Name ▲ Arranged By ▲ With ▲ Meeting Category ▲ Meeting Date ▲ Time ▲ Duration ▲ Status ▲ Last Modified ▲ edit delete



Functions:

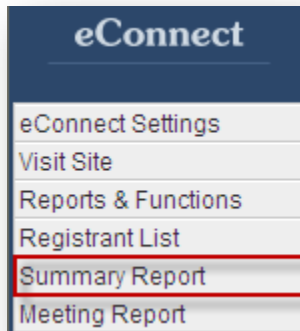
Print Schedules: Clicking the print schedules will allow you to view each category and the number of attendees in each category. Click on the name of the category to print the schedule for each attendee. You can also click the first link which will print all the schedules for the confirmed attendees.





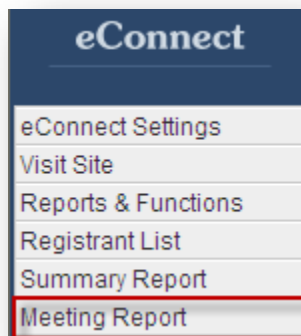
Registrant List: Clicking this option will allow you to view the current registrant list in your eConnect database. This is the same information that is included on the attendee database report.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All							Attendees Per Page 50
Conf #	First Name	Last Name	Job Title	Company	Category	Sub-Category	Included
720902	Wilma	Rubble	Vice President	Barney and Co.	Attendee	Non Member	✗
720893	Julian	Ward	VP of Operations	WeBe Computers	Staff		✓



Summary Report: Clicking this link will open the summary report that displays the details regarding your event summary and statistics for each of the days. This is the same information that is included on the summary report in the reports and functions link.

Event Summary	
Total Attendees	
Messages sent	0
Total Meeting Requests	9
Confirmed Meeting Requests	3
Rejected Meeting Requests	
Stats For 06/30/2009	
Total Requests	9
Confirmed	3
Rejected	



Meeting Report: Clicking this link will allow you to view a report of all the meetings in the eConnect database. This is the same information that is included on the meeting report in the reports & functions link. This report displays every meeting, who arranged it, the duration, etc.

Meeting Name	Arranged By	With	Meeting Category	Meeting Date	Time	Duration	Status	Last Modified	edit	delete
--------------	-------------	------	------------------	--------------	------	----------	--------	---------------	------	--------