Connecting international educators with the world's best agents

ICEF Workshops

Marcom eSchedule PRO

Getting Started information for Agents

Important

This version of Marcom eSchedule PRO has been customised for ICEF Workshops. Marcom eSchedule PRO meeting scheduling system is provided to all participants at no additional cost. It should be used to schedule all meetings. Meetings made outside of the system will not be recorded and may result in conflicting meetings.

> Overview

Marcom eSchedule PRO is a centralised web-based meeting scheduling system which facilitates the meeting booking process between participants prior to the workshop.

The system is extremely user-friendly as it follows a traditional approach:

- You view/search/filter the list of participants and send meeting requests to those you want to meet
- Contacted participants receive an email and your name is added to their list of meeting requests received
- When a participant schedules a meeting with you, you receive an email and your online schedule is updated
- You will also receive meeting requests from other participants interested in meeting with you
- You schedule meetings with participants you are interested in meeting and decline other requests
- Prior to the event you can export your schedule to PDF, print it and take it to the workshop.

The top menu bar includes easy-to-use tabs to navigate between the following sections:

[My Schedule]

View/cancel existing meetings, reschedule meetings, block/unblock timeslots, indicate whether you will attend social events, add comments, view who initiated the meeting, print your schedule.

If you attend this event with a colleague you can also view your colleague's schedule, join meetings, transfer meetings between schedules, add comments to your colleague's schedule, indicate whether your colleague will attend social events.

[Requests Received]

List of meeting requests received from other participants (listed by category).

If you attend this event with a colleague: View all meeting requests received by your colleague and even schedule meetings with participants who have contacted your colleague.

[Educators] - [Service Providers]

List of representatives classified by organisations with filter and search options. Send, resend and cancel meeting requests to participants, view the status of all actions completed.

If you attend this event with a colleague: View the status of all actions completed by your colleague.

[Seminars / Sessions]

Click on this tab to view all pre-event seminars offered to all participants. Make your selection and click on the "Add to My Schedule" icon located in the Actions column to sign up. Added sessions will then be displayed on your schedule.

[Message Centre]

The Administrator and the event organiser will occasionally post messages for you. Please make sure that you read all your messages as the message centre will only be used for important notifications.

[Edit Profile]

View/Edit your personal and business account information and change your password.

[Other links]

The "Getting Started & FAQ", "Support" and "Log out" links are always available above the menu bar on the right.

Marcom eSchedule PRO

> Review / Edit your profile & Google Maps Location

Upon your first login, you will be prompted to review your profile and Google Maps Location and add/update information as needed.

At any time, you can also make changes to your profile by clicking on the [Edit Profile] tab. Make sure you click on the "Save" button in order to save your changes.

In order to review/edit your business information, please follow these steps:

- Click on the [Edit Profile] tab
- Click on the "Click here to review/edit your business information and Google Maps location" link
  (large green button) on the right of your personal details
- Review/edit your business information
- Scroll down to the bottom of the page and click on the "Save" button to save your changes

Please note that If you attend this event with another representative from the same organisation, your Marcom eSchedule PRO accounts are linked and your business information is identical on both accounts.

Agents cannot make changes to their agency description via their Marcom eSchedule PRO account. Please send your updated text by email directly to the event organizer who will update your profile.

> Block off timeslots

There are a number of reasons why you may want to block off some timeslots such as: you want to keep some sessions for late bookings, your flight leaves early ...

To block some timeslots:

- Click on the **[My Schedule]** tab in the menu bar
- In the Actions column of your schedule, click on the block timeslot icon -
- Click on "Yes" when the alert message appears

To unblock a timeslot, follow the reverse process by clicking on the unblock icon -
Your timeslot will then become available for bookings.

Agents may block off up to three timeslots. Please contact the event organiser if you need to have this limit increased.

> Requests Received

You will receive meeting requests from other participants by email. These requests are listed in the **[Requests Received]** section. Please make sure that you process all requests received either by scheduling a meeting or by declining these requests.

To view all meeting requests received, click on the **[Requests Received]** tab in the menu bar. Requests are listed by category of participants. Click on the Unanswered Requests link to view pending requests.

The numbers of common available timeslots to schedule meetings with other participants appear in the "Matching timeslots" column. If you have no common timeslots available with a participant, you will be invited to launch the Matching Wizard.

You then have several options:

A - You are interested in meeting with this participant. Click on the Schedule meeting icon in the Actions column to book a meeting.

When scheduling meetings, you can write short notes which will be inserted in the email notifying other participants of new meetings. These notes can be saved for future use. If you chose to do so, these notes will be added to your saved notes which you can manage in the **[Requests Received]** > My Saved Notes subsection.

*If your colleague is attending the event with you, he/she is able to schedule the meeting requests that have been sent to you. To do so, he/she just needs to click on the **[Requests Received]** tab in the menu bar and then on the [unanswered request(s)] link located below your name ("My colleague - [your name]")*

Note:

If you are interested in meeting with a participant but you have no common available timeslots, you may contact the other participant by email and ask if he/she is interested in meeting with you during a break timeslot such as a coffee break or a lunch break. You will then both need to unblock the same break timeslot on your schedules so that the meeting can be confirmed.

B - You are not interested in meeting with this participant or unable to do so. Click on the decline icon ▨ in the Actions column to decline this meeting request and add a short message for the sender (optional). You may decline multiple requests at the same time by selecting them and clicking on the "decline all selected requests" link located above the list.

When declining meeting requests, you can add notes for the senders. These notes can be saved for future use. If you chose to do so, they will be added to your saved notes which you can manage in the **[Requests Received]** > My Saved Notes subsection.

Note:

If you declined a meeting request by mistake, or changed your mind after you declined the request, you are still able to schedule the meeting. To do so, you just need to click on the [declined requests] link and then you will be able to click on the "schedule meeting" icon located next to the request on the right.

*If your colleague is attending the event with you, he/she is able to schedule a meeting request that you declined. To do so, he/she just needs to click on the **[Requests Received]** tab in the menu bar and then on the [declined requests] link located below your name ("My colleague - [your name]")*

Tips:
Place your cursor on the message icon ▨ to view the meeting request message.
Place your cursor on the reminder number to see when this request has been sent/resent.

> Contact other Participants

Click on the **[Educators]** or **[Service Providers]** tab in the menu bar to view all organisations currently registered for this event.

When viewing the list of representatives you have two ways of requesting a meeting:

A - You click on the request meeting icon ▨ in the Actions column of a specific representative. You can then enter a personalised message to request a meeting with this participant.

B - You pre-select some participants by using the checkbox and you click on the "Request a meeting with all selected participants" link to contact all selected participants at the same time. You will then have the opportunity to add your message and the system will perform an email merge.

In both cases, you will be asked if you want to save your message template for future use. Your saved message will appear next to the message box next time you send a meeting request.

It will also be added to your saved messages which you can manage in the "My Saved Messages" subsection within each participants' category (**[user category]** > My Saved Messages).

Thanks to percentage rates displayed next to each message template, you can monitor how successful your saved messages are and identify which ones led to confirmed meetings. The statistics appear in the "My Saved Messages" subsection within each participants' category, and to the left of the message box when you write your meeting request.

Your meeting requests sent can be viewed in the Actions column next to the representative name.
An alert message above the list will inform you if some of your meeting requests have been declined.

> Other features

This version of the Marcom eSchedule PRO contains other important features such as:

Who's Who

The list with photos of participants has been added so that you can match a face with a name. You just need to click on the "Who's Who" link located just above the list of participants on the left. You can also use the filter to identify participants you will be meeting.

Schedule changes

All actions made by other participants and/or your colleagues on their meetings that also affect your meetings (rescheduling, transfer, join, cancellation, ...) will now be displayed above your schedule.

"Met at past workshops" filter

A new filter has been added that allows you to display the list of participants that you met at past workshop.

Click on the **[Educators]**, or **[Service Providers]** tab in the menu bar.

Click on the "--Status--" in the Filter box located just above the list of participants on the left and select "Met at past workshops".

Click on the "Go" button.

"Participants added since my last login" filter

A new filter has been added that allows you to display only participants added to Marcom eSchedule PRO since your last login.

Click on the **[Educators]**, or **[Service Providers]** tab in the menu bar.

Click on the "--Status--" in the Filter box located just above the list of participants on the left and select "Added since my last login".

Click on the "Go" button.

Search on all categories

When you search a participant in a specific category, Marcom eSchedule PRO will also let you know if participants from other categories meet your search criteria.

My past meetings

You can now view which participant(s) you have met before at an ICEF Workshop. An icon is displayed next to the name of the relevant participant(s).

Download participant's details as vCard

Participant's contact information can now be downloaded as a vCard, a standard electronic business card format supported by all major address book and email applications.

Schedule meetings during non-meeting sessions

You have the possibility to schedule meetings during non regular meeting sessions (coffee breaks, lunch...). You first need to unblock the corresponding timeslot on your schedule to indicate that you are willing to accept meetings at this time. Other participants, whom you have contacted, will then be able to schedule a meeting with you after unblocking the corresponding timeslot on their own schedule.

Quick Scheduling

If you only need to schedule a meeting rapidly, you can do it from you PC or your smartphone. You just need to click on the **[Schedule this meeting in two clicks]** link at the bottom of the meeting request e-mail. You can then select an available timeslot in order to book the meeting. Whether you use your PC or your smartphone, a message is displayed to confirm that the meeting has been added to your schedule. The Quick Scheduling process only works if you still have common available timeslots

Marcom eSchedule PRO Matching Wizard

As the event date approaches, it becomes more and more difficult to find common available timeslots with other participants. In this case, you will be prompted to launch the Matching Wizard which will analyse both schedules and try to suggest solutions via rescheduling meetings, unblocking timeslots... You can then select the best option and ask Marcom eSchedule PRO to arrange the meeting for you!

If you attend this event with a colleague, you can also ask the Matching Wizard to search for a matching timeslot with your colleague.

Advanced Filter Alerts

By clicking on the "Advanced Filters" link above the lists, you can refine your search and specify search criteria. You can save your filters and activate an alert to be notified by email whenever a new participant matching your criteria is added to the database.

My Lists

The "My Lists" feature allows you to quickly classify participants as you like within 10 different lists. You can name your lists and complete group actions such as send the same meeting request to all participants from one list. The list of participants can easily be filtered so as to display only participants you have added to your own lists.

Click on ➕ next to an organisation or an institution in order to add it to one of your lists. You can also select several organisations by checking the boxes next to their names and add them to the same list. You can name and rename your lists via the **Educators/ Service Providers** > My Lists of [user category] subsection.

Click on ➖ to remove an organisation or institution from your lists.

Exporting the list of participants

You can export the full list of participants or a partial list resulting from a search or filter to PDF or Excel. Exporting to Excel comes with more options as you can select which information you want to export by dragging the corresponding fields from left to right. Your field selection is now recorded so that you can use it as many times as needed.

Attending Social Events

You can specify whether you will be attending social events listed on your schedule. Simply click on the corresponding icons in the Actions column to confirm your selection.

If you attend this event with a colleague you can also view your colleague's schedule in order to indicate whether he/she will attend social events.

> FAQ

1. [Why do I need to use Marcom eSchedule PRO for all my meeting bookings?](#)
2. [Can I add an meeting to my schedule?](#)
3. [What happens when I send a meeting request to another participant?](#)

Q. Why do I need to use Marcom eSchedule PRO for all my meeting bookings?

A. Because the system compiles meetings for all participants. Meetings not recorded by the system may result in conflicting meetings.

Q. Can I add a meeting to my schedule?

A. Yes, you can schedule a meeting only if you (or your colleague) have received a meeting request from another participant. If you schedule a meeting with another participant outside of Marcom eSchedule PRO, please make sure that you follow up with a meeting request so that this meeting is properly recorded.

Q. What happens when I send a meeting request to another participant?

A. The other participant receives an email with your message requesting a meeting and a link to Marcom eSchedule PRO login page where he/she can login. An alert is also posted on the participant's schedule to indicate that a new meeting request has been received.

Q. When scheduling a meeting with me, do other participants see my schedule of meetings?

A. No, other participants only see when both of you are available so that they can select the most appropriate time.

Q. Is it possible for a participant to book two meetings with two different organisations during the same session?

A. No, double booking is not permitted by the system but you may meet two representatives from another organisation if a second representative decided to join the initial meeting.

Q. Can I resend a meeting request if I don't get a reply?

A. Yes, you can resend the same meeting request if you have not received a reply after two days. Requests which have been resent are listed on top of the list of meeting requests received. Resent requests are not transmitted by email (unlike the first one).
You can view the lists of participants to whom you can resend meeting request by using the "Unanswered requests to be resent" filter. It can be accessed via the filter options located just above the list of participants.

Q. Can I schedule meetings during break sessions?

A. Yes, but you and the other participant must first unblock the corresponding timeslot on your Schedule.

Q. How do I reschedule or cancel a meeting?

A. Click on the **[My Schedule]** tab and click on the Reschedule or Cancel icon corresponding to the meeting. If you cancel an meeting, an email will automatically be sent to the other participant to let him/her know of this cancellation. No email is sent to the other participant when you reschedule a meeting.

Q. Can I cancel a meeting request?

A. Yes, you can cancel meeting requests which have been sent and which are still unanswered. Please note that no email notification is sent out to the recipient when you cancel your request. This request is simply removed from his/her list of requests received.

Q. How can I transfer meetings between schedules?

A. Click on the **[My Schedule]** tab and click on the Transfer icon in the Actions column. You will then have the option to transfer the meeting to the same timeslot (pre-selected and circled in red) if your colleague is available or transfer it to another timeslot when both representatives are available. You can also transfer meetings from your colleague's schedule to your schedule by following the reverse process.

Q How can I join a meeting?

A. Click on the **[My Schedule]** tab and click on the link with the name of your colleague. You will then see all meetings made by your colleague. A Join Meeting icon will appear in the Actions column of your colleague's schedule if you are available during this timeslot. If you click on the Join Meeting icon, this meeting is automatically added to your schedule. Your name will also be automatically added on the schedule of the other party so that he/she is aware that you've joined the meeting.

> **Support** ————————————————————————

If you need assistance with Marcom eSchedule PRO, please send an email to the support team support@marcom-education.com. All inquiries are answered within one working day.