Getting Started Information for Providers

ICEF
Connect. Recruit. Grow.

Important:

This version of Marcom eSchedule PRO has been customised for ICEF Events. 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 event.

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 bring it with you.

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

Your schedule

View/cancel existing meetings, reschedule meetings, add comments, view who initiated the meeting, print your schedule.

If you attend this event with your colleagues (and he/she has an own scheduling account) 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.

If you attend this event with a colleague (and he/she has an own scheduling account): view all meeting requests received by your colleague and even schedule meetings with participants who have contacted your colleague.

Participants

Participants are listed under the following tables: EDUCATORS, AGENTS, and SERVICE PROVIDERS. Send, resend and cancel meeting requests to participants, view the status of all actions completed.

If you attend the event with colleagues from the same organisation, and they have their own schedule, you can view the status of all actions completed by your colleagues.

Seminars

Click on this tab to view 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 seminars will then be displayed on your schedule.

Other options

You can click at any time on the downward arrow located next to your name, in the top right corner to:

- Review and update your profile details.
- Change your password.
- Contact our support team.
- Read the Getting Started & FAQ.
- Log out.
- Replay the Quick tour.

REVIEW/EDIT YOUR PROFILE

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

At any time, you can make changes to your personal and/or business information. Make sure you click on the "Save" button in order to save your changes.

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

1. Click on the downward arrow next to your name, in the top right corner, and select "Edit profile" in the dropdown list.
2. Review/edit your personal information.
3. Scroll down to the bottom of the page and click on the "Save" button to save your changes.
4. Click on the "Edit your business information" (large green button) on the right to review/edit your business information.
5. Make the necessary changes.
6. Scroll down to the bottom of the page and click on the "Save" button to save your changes.

If you attend the event with colleagues from the same organisation, and they have their own schedule, your Marcom eSchedule PRO accounts are linked and you share the same business information.

BLOCK OFF TIMESLOTS

If you know you will be unavailable at some point during meeting sessions, because your flight comes in late or leaves early, or if you want to set time aside for late bookings or your personal activities, you can block off the corresponding timeslots in your schedule.

To do so:

1. Click on the MY SCHEDULE tab in the menu bar.
2. In the "Actions" column of your schedule, click on the block timeslot icon 🔲
3. Click OK 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.

SCHEDULE MEETINGS

Meeting requests sent to you by other participants will be listed in the REQUESTS RECEIVED section of your account. You will also receive them by email. Please make sure that you process all requests received either by scheduling a meeting or by declining these requests.

Viewing requests received

To view pending meeting requests:

1. Click on the REQUESTS RECEIVED tab in the menu bar.
2. Select "View all" in the dropdown menu.
3. Click on the relevant "unanswered" link.

The numbers of common available timeslots to schedule meetings with other participants appear in the "Matching timeslots" column. If you do not have any common available timeslots with a participant, you will be invited to launch the Matching Wizard.

Tips:

Click on the message icon 📧 to view the meeting request message.

Click on the reminder number to see when this request has been sent/resent.

Scheduling a meeting with a participant

1. Click on the "schedule meeting" icon 🖼 in the "Actions" column.
2. Tick the "Insert a note" box if you want to write a short note to the request sender. It will be included in the email notifying him/her of the new meeting.
3. Select an available timeslot.
4. Click on the "Confirm" button to add the meeting to your schedule. It will also be automatically added to the other participant's schedule.

Tips:

If you insert a note for the request sender when scheduling a meeting, your note can be saved for future use.
You can manage your saved notes in the REQUESTS RECEIVED section of your account, under "My Saved Notes"

If you are attending the event with your colleagues, you can schedule meeting requests that have been sent to them.

To do so:

1. Click on the REQUESTS RECEIVED tab in the menu bar.
2. Select "View all" in the dropdown menu.
3. Click on the relevant "unanswered" link in the "Requests received by my colleagues" table.

Note:

If you do not have any common available timeslots with the other participant, you can click on 📝 in the "Actions" column to try the Matching Wizard.

- If the Matching Wizard finds scheduling options, select one of the suggested solutions and click on the "Do it for me" button.
- If the Matching Wizard cannot find any solutions, you can contact the other participant by email, to arrange a meeting outside regular meeting sessions for example, or you can decline the request.

DECLINE MEETING REQUESTS

If you are not interested in meeting with a participant who requested a meeting with you or unable to do so, please be sure to decline the corresponding meeting request.

To do so:

1. Click on the "Decline" icon in the "Actions" column.
2. You may also select multiple requests and then click on the "decline selected meeting request(s)" button located above the list to decline them at the same time.
3. Insert a note to explain why you decline the request(s). If you do not want to write a note to the sender(s), untick the "Insert note" box.
4. Click on the "Submit" button to decline the request(s).

Tips:

If you insert a note for the request sender when scheduling a meeting, your note can be saved for future use.

You can manage your saved notes in the REQUESTS RECEIVED section of your account, under "My Saved Notes"

Scheduling a declined request

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:

1. Click on the REQUESTS RECEIVED tab in the menu bar.
2. Select "View all" in the dropdown menu.
3. Click on the relevant "declined" link.
4. This opens a list of decline requests.
5. Click on the "schedule meeting" icon corresponding to the request in the "Actions" column.

If you are attending the event with your colleagues, you can schedule meeting requests they have declined.

To do so:

1. Click on the REQUESTS RECEIVED tab in the menu bar.
2. Select "View all" in the dropdown menu.
3. Click on the relevant "declined" link in the "Requests received by my colleagues" table.

CONTACT OTHER PARTICIPANTS

Click on the EDUCATORS, AGENTS, and SERVICE PROVIDERS tab in the menu bar and select "View all" in the dropdown menu to view all organisations currently registered for this event.

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

Send an individual meeting request

1. Go to the list of participants.
2. Click on the "request meeting" icon in the "Actions", next to the participant you want to send the meeting request to.
3. Enter your message to the participant.
4. Click on the "Send" button to send your request.

Send multiple meeting requests

1. Go to the list of participants.
2. Tick the boxes on the left of the list corresponding to participants you want to send the meeting requests to.
3. Click on the button located above the list to request a meeting with all selected participants.
4. Enter your message.
5. Click on the "Send" button to send your requests.

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. To manage your saved messages, go to the tab corresponding to the list of participants and select the "My Saved Messages" submenu.

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. You can also access the statistics on the left of the message box, when you write your request.

Tips:

To view a meeting request you have sent, click on the "Print" icon in the "Actions" column, next to the name of the participant you sent it to.

To access the list of requests you sent that have been declined, go to the tab corresponding to the list of participants and select the "Requests send & declined" submenu.

USEFUL FEATURES

This version of Marcom eSchedule PRO contains other important features that are available via your account:

Saved meeting requests

You can export your message templates and use them at other events.

During the import, make sure that you update the content of the messages that might be relevant to specific events, such as the event name.

Colour coding (Berlin only)

A colour will be allocated to each room. When scheduling a meeting a coloured background will appear behind the name of the location so that participants and specifically agents can group their meetings and reduce their transit time between meetings.

The same background colours will appear on the online agenda and on the PDF schedule.

Photo/logo format

You can upload your photo/logo in any of the available formats: GIF, JPG, JPEG, PNG.

Who's Who

This 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 tab corresponding to the list of participants, and then on the "Who's Who" submenu. You can also use the filter to identify participants you will be meeting.

My schedule timeline

Click on the "My schedule timeline" button located above your schedule, on the right, to view all actions made by other participants and/or your colleagues on their meetings that also affect your schedule. These include rescheduled, transferred, and cancelled meetings, as well as meetings your colleagues joined in.

"Met at past events" filter

To easily get a list of participants you have met at past events, click on "— Status—" in the filter box and select the "Met at past events" filter.

My past meetings

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

Participants "Added since my last login" filter

You can filter the list of participants to display only those added to Marcom eSchedule PRO since you last logged in. To do so, click on "—Status—" in the filter box and select "Added since my last login".

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.

Download participants' details as vCard

Participants' 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 your 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 with the request sender.

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 relevant "My Lists" submenu in the list of participants.

Click on − to remove an organisation 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

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 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 where he/she can log in. 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 the same organisation if a second representative decided to join his/her colleague's 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 requests 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 a 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 or have been declined. 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 to my colleague" 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. To join your colleague's meetings, go to MY SCHEDULE tab . Click on the drop-down list located above your schedule, on the left, and then select the name of your colleague. You will then see your colleague's schedule. A "Join this meeting" icon will appear in the "Actions" column next to meetings if you are available during this timeslot. Click on the icon 📇 to automatically add the meeting to your schedule. Your name will show on the other party's schedule so that they are aware you have 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.