

ECRM Connect™

My MarketGate is your one stop shop for all event preparation, product organization, lead sourcing and news. Once you're registered for an ECRM event, My MarketGate is the platform where you can find all of the tools offered with your event registration. Overall, ECRM'S Product Library it the ideal tool to source new products.

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Event Listing

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Event Listing Defined:

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The screenshot shows the ECRM Connect Event Listing page. At the top, there are navigation tabs: 'UPCOMING EVENTS', 'PAST EVENTS', 'RECOMMENDED EVENTS', and 'ALL EVENTS'. Below this, there are four event cards for 'EPPS' (Event Preparation and Product Showcase) in various categories: Skin, Bath, Cosmetics & Fragrances; Hair & Ethnic; Personal Care, Oral & Baby; and Sun Care. A fifth card for 'The Health Care EPPS' is partially visible. Callouts provide the following information:

- View a list of events you're registered to attend.** (Points to the 'UPCOMING EVENTS' tab)
- Past events that you've attended.** (Points to the 'PAST EVENTS' tab)
- Events you're not registered for but fit into your focus.** (Points to the 'RECOMMENDED EVENTS' tab)
- View past and future ECRM events.** (Points to the 'ALL EVENTS' tab)
- Filter to only EPPS events, other events, events you're registered for or events your company is registered to attend.** (Points to the 'Filter' icon)
- Click to see the Event Dashboard. Enter Event is only available for events that are currently taking place.** (Points to the 'Enter Event' buttons)
- Click Preview Event to see the Event Dashboard. Preview Event is only visible if you're registered for the event.** (Points to the 'Preview Event' buttons)
- Take ECRM Connect outside of EPPS events and use during everyday meetings.** (Points to the 'ECRM On the Go' icon)
- Access Industry Contact information.** (Points to the 'Search Industry Contacts' icon)
- Visit ECRM's homepage www.ecrm.marketgate.com.** (Points to the 'Visit ECRM Marketgate.com' icon)

Event Dashboard

Review the Event Dashboard for everything you need to know about a particular event.

View Event Dashboard:

Below is a general overview of the Event Dashboard page.

Take meeting notes, select items of interest and send emails.

Review the time layout for the event including meals, general sessions and evening activity information.

View freight and flight information when applicable.

Review contact information for each person attending the event.

Review meeting notes and follow up.

Jot down quick thoughts with the Notepad.

Send a quick email to the ECRM team members at the event.

Take photos of event happenings.

Review hotel and meeting space information when applicable.

Event Dashboard Content:
 Hello Again Susan,
 Click on the 'Meeting Recap' button below to get started with event follow up.
 Buttons: Event Agenda, My Meetings, Meeting Recap, Notepad, Freight & Flight, Attendees, Take Event Photo, Contact ECRM.
 Location: Chateau Elan Winery & Resort, 100 Rue Charlemagne, Braselton, GA 30517 United States, 800-233-9463.
 Links: Website, Directions, Hotel Layout, My Meeting Room.

My Meetings

Click the My Meetings button to view the Schedule page.

My Meetings Page Defined:

Once My Meetings is clicked you can view the Schedule page. This page shows your appointment list and is the gateway to the Meeting Notes page.

Company attending the meeting.

Meeting time.

Event the company is attending.

Swipe to view meeting schedule for the next day.

Meeting rank selected on the Meeting Notes page.

Click > to view the Meeting Notes page for that company.

Location where the meeting takes place.

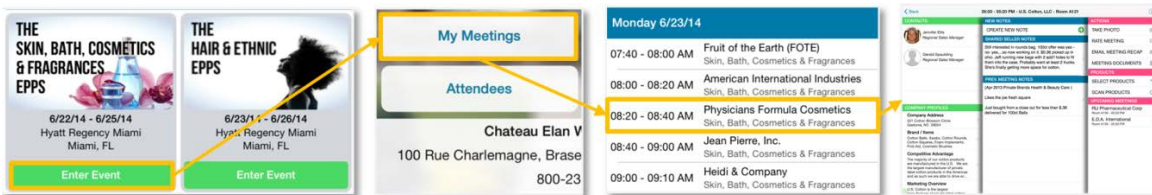
Monday 6/23/14	Room	Rank
07:40 - 08:00 AM Fruit of the Earth (FOTE) Skin, Bath, Cosmetics & Fragrances	Room 225	★★★★★
08:00 - 08:20 AM American International Industries Skin, Bath, Cosmetics & Fragrances	Room 226	
08:20 - 08:40 AM Physicians Formula Cosmetics Skin, Bath, Cosmetics & Fragrances	Room 229	★★★★★
08:40 - 09:00 AM Jean Pierre, Inc. Skin, Bath, Cosmetics & Fragrances	Room 231	
09:00 - 09:10 AM Heidi & Company Skin, Bath, Cosmetics & Fragrances	Ballroom A	
09:10 - 09:20 AM *** BREAK ***		
09:20 - 09:40 AM EyeDoll Chatter Skin, Bath, Cosmetics & Fragrances	Ballroom D	
09:40 - 10:00 AM SinfulColors Inc. Skin, Bath, Cosmetics & Fragrances	Ballroom F	

Meeting Notes

Use the Meeting Notes page to document all important meeting details.

View the Meeting Notes Page:

Follow the below navigation instructions to view the Meeting Notes page.



Meeting Notes Page Defined:

All information captured on the Meeting Notes page can be referenced during and after the event.

View the attendees from the company that you're meeting with. Click on an attendee to view contact information or to take a personal note.

If not made private you can view the notes taken by the company you're meeting with.

Use the Company Profiles section to learn about a company's capabilities and event focus.

View notes taken before the show. These notes are entered on the preparation site.

Click the Plus + icon to create a new meeting note.

Click to take a photo of a product.

Give this meeting a score between 1 and 5 stars.

Email a meeting recap to select contacts.

View documents uploaded on the prep website.

Select items of interest.

Scan products to flag items of interest.

View the time & location for upcoming meetings.

View meeting notes taken during past meetings.

Who has visibility to the documents listed in the Meeting Documents section and how are those documents edited?

The Meeting Documents are only visible to the supplier who uploaded the document and the selected retail account. If you're a supplier you must upload the Meeting Documents through the preparation website.

Where are the featured items listed and how do I edit those items?

Featured products are listed on the Actions section of the Meeting Notes page. If you're a supplier you can select your featured items via the Featured Products section on the Online Preparation website.

Where are the Pre-Show Notes entered?

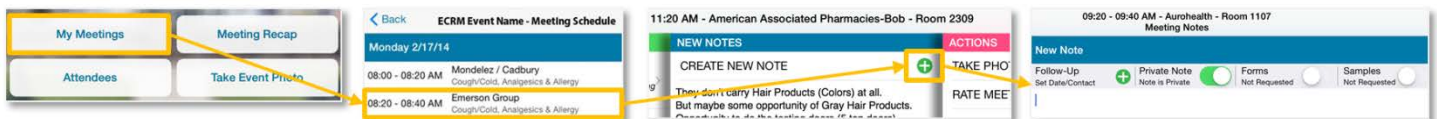
These notes are entered in the pre-meeting notes section of the preparation website.

Who has visibility to the Meeting Ranking?

Only you have visibility to the meeting ranking as this information is always private. The Meeting Ranking is designed to help you evaluate meeting productivity.

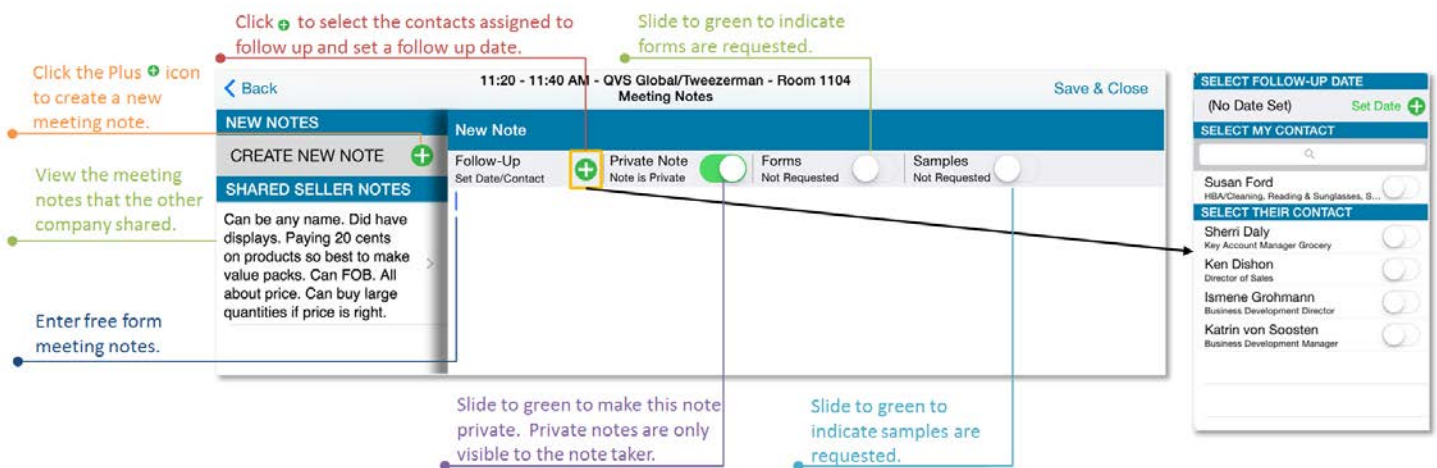
View the Create New Note Page?

Follow the below navigation instructions to create a New Meeting Note.



Create a New Meeting Note Page Defined:

Below is a high-level overview of the features available on the New Meeting Note page.



After the meeting where can you view meeting notes?

You can view all meeting notes on the Meeting Recap tab. All information can also be access on the Follow Up website <http://ecrm.marketgate.com/FollowUp/>.

When creating a new note what are the defaults?

The note will always default to the selections that were made on the previous meeting note.

Meeting Recap

The Meeting Recap page displays a line listing of the notes taken and product selections made during each meeting.

Meeting Recap Page Defined:

Below is a general overview of each option available on the Meeting Recap page.

Company	Notes	Products	Follow-Up	Forms	Samples	Photos	Ranking	View
Basic Research	1	0	1/13/2014	No	No	No	★★★★★	Review >
Body and Soul	1	0	12/8/2013	No	No	No		Review >
Creative Bioscience	1	0	1/12/2014	No	No	No		Review >
Ddrops Company	1	0	1/15/2014	No	No	No		Review >

Email Meeting Recap Page Defined:

Below is a general overview of each option available on the Email Meeting Recap page.

The screenshot shows the 'SELECT EMAIL RECIPIENTS' section with three contact cards: John Ciotola, Susan Ford, and Scott Waidmann. Below this is a 'SEARCH & ADD CUSTOM EMAIL RECIPIENTS' section with a search bar and an 'Add Custom Email Address' button. The 'ATTACHED ITEMS' section has four toggle switches: Notes Attached, Products Attached, Forms Attached, and Photos Attached. The bottom section is 'CREATE MESSAGE AND SEND' with a text area for a custom message and a 'SEND EMAIL' button.

Once an email is sent, will the recipient receive the email immediately?

No, emails are sent from the ECRM server every five minutes.

FAQs

Can two users enter information into Connect at the same time?

Yes, multiple users can enter information into ECRM Connect at the same time while using different devices.

Can I change my profile picture on Connect?

No, contact an ECRM staff member who can update the photo for you.

Can I use Connect when not connected to the internet?

Yes, you can take notes, make product selections, etc. when you're not connected to the internet. As soon as the iPad reconnects to the internet, all information that was saved while offline will synch.

There are green signal bars located in the bottom left hand corner of Connect. What does that signal mean?

The green signal means you're connected to the internet. The red signal means you're not connected to the internet.