MARKETPLACE 2018
SCHEDULE TIPS FOR APPOINTMENTS

APPPOINTMENT SCHEDULE TAB
The purpose of this tab is to show you all the appointment times, regardless of if they are scheduled or open. You can make requests for new appointments and cancellations of existing appointments.

REQUESTING AN APPOINTMENT
To request an appointment for any of your open appointment slots, you can either select one open appointment or you can hold down the “Ctrl” key and select multiple appointments.

You can also click on the “Select Open” button to highlight all of your open appointment slots.

Note: Go to the “Open Appointments” tab and follow the same steps. This tab shows you only your open appointments for easy viewing.

Once you have selected any or all open slots, click on the “Request Appointment” button. This will open the search window.

CANCELLATION
To make a cancellation of a scheduled appointment, select the applicable appointment and click the “Cancel Appointment” button.

You are only able to select one appointment at a time to cancel.

SEARCH WINDOW
Search for Recipients by performing a quick search for Name, Title, Company Name or First Time. For a more extensive search, click on the Registration Type and then choose specific profile criteria you are interested in and click “Search”.

Note: You can only select one Registration Type at a time in order for profile criteria to appear.

The results from your search will appear in the “Search Results of Recipients with Common Open Slots” on the right side of your screen. You can select one listing, hold down the “Ctrl” key to select multiple listings, or select all available listings, by clicking on the “Select All” button. Once you have made your selection, click on the “Add Delegates” button to add them to the Recipient field and click on the “Send Request” button.

You will be able to see all of the requests you have sent in your “Requests By Me” tab.

Note that all delegates who match your criteria and who have an open time in a least one matching slot will be displayed in the Search results, however not all are available. If you already have an appointment with the delegate, they have already requested them for the selected slots or have received a request from them for the selected slots they will be marked as Scheduled, Requested By Me or Request Received.

OPEN APPOINTMENTS TAB
This tab shows you all of your open appointment slots for easy viewing.

Requesting an Appointment
To request an appointment for any of your open appointment slots, you can either select one open appointment or you can hold down the “Ctrl” key and select multiple appointments.

You can also click on the “Select Open” button to highlight all of your open appointment slots.

Note: You can also go to the “Open Appointments” tab and follow the same steps. This tab shows you only your open appointments for easy viewing.

Once you have selected any or all open slots, simply click on the “Request Appointment” button.

REQUESTS TO ME TAB
This tab shows you all of the requests sent to you, which include Appointment Requests.

All of the “Pending” requests will appear at the top of the list. Once that request has either been accepted or declined, it will move to the bottom of the list and be marked as either “Scheduled” or “Granted” depending on the type of request received.

To accept or decline any pending request, click on the “Action” link in the last column labeled “Details”.

Once you have accepted or declined that request, it will either be added or removed from your appointment schedule, depending on the type of request and the status of that request will change from “Pending” to “Scheduled” or “Granted”.

A status of “Unavailable” means that the request is no longer available to you because the person that requested you is no longer available to meet at that specific time.

REQUESTS BY ME TAB
This tab shows you all of the requests sent by you, which include Appointment Requests and Change Requests.

All of your “Pending” requests will appear at the top of the list. Once that request has either been accepted or declined, it will move to the bottom of the list and be marked as either “Scheduled” or “Granted” depending on the type of request sent.

This tab is for your personal settings. The email address you provided when registering will be listed as the default email address and all appointment requests/messages will be emailed to you as well as appear in your “Requests For Me” tab or “Inbox” tab. You can also check the box to allow requests/message notifications to be sent to your cell phone via SMS Messaging.

INBOX MESSAGES
This tab shows you all of the general email messages you have received from within the message center. To compose a new message, click on the “Compose” button and enter your search criteria. There will not be any appointment request messages you’ve received listed under this tab.

Go to the Requests For Me tab to view requests you have been sent.

SETTINGS
This tab is for your personal settings. The email address you provided when registering will be listed as the default email address and all appointment requests/messages will be emailed to you as well as appear in your “Requests For Me” tab or “Inbox” tab. You can also check the box to allow requests/message notifications to be sent to your cell phone via SMS Messaging.

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