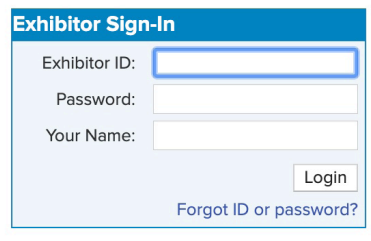*The Scheduled Appointments tool is a way for exhibitors to set up and manage appointments with attendees through the Exhibitor Dashboard. This tool allows exhibitors to post available appointment times to their online directory listing, and attendees can reserve these appointments while logged into their My Show Planner accounts, allowing them to easily connect with exhibitors on-site or virtually.*

Utilizing the Scheduled Appointments tool will allow you to:
- *Control your appointment schedule*
- *Assign staff members specific appointment times to allocate resources appropriately*
- *Determine the meeting type for each available appointment (on-site, virtual, or other)*
- *View overall meeting schedule to see on-site booth visits vs virtual meetings*

Accessing Scheduled Appointments

1. Sign-in to the **Exhibitor Dashboard** with your assigned login credentials.

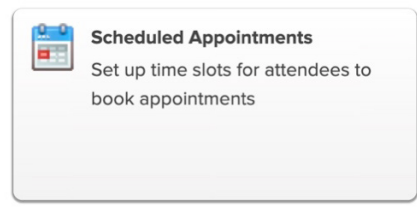2. Click the **Scheduled Appointments** tile.

Creating Appointments

1. To create open appointments to display on your online exhibitor listing, click the **Create New Appointments** button.

2. You will be directed to the Create A New Appointment page where you can begin entering your appointment information. All fields are required.

3. Enter the appointment date, start time, end time, and the number of appointments available per time slot.

4. Select the desired length of the appointments.

5. Choose where the appointments will take place. (Booth number, virtually, or other)
   Options will vary depending upon individual show setup.

6. Once you have completed all fields, check the right side of your screen for a schedule preview to make sure everything is displaying as expected. Once confirmed, click the **Add New Appointments** button.

7. Repeat steps 1-6 as needed to add additional appointments to your schedule.
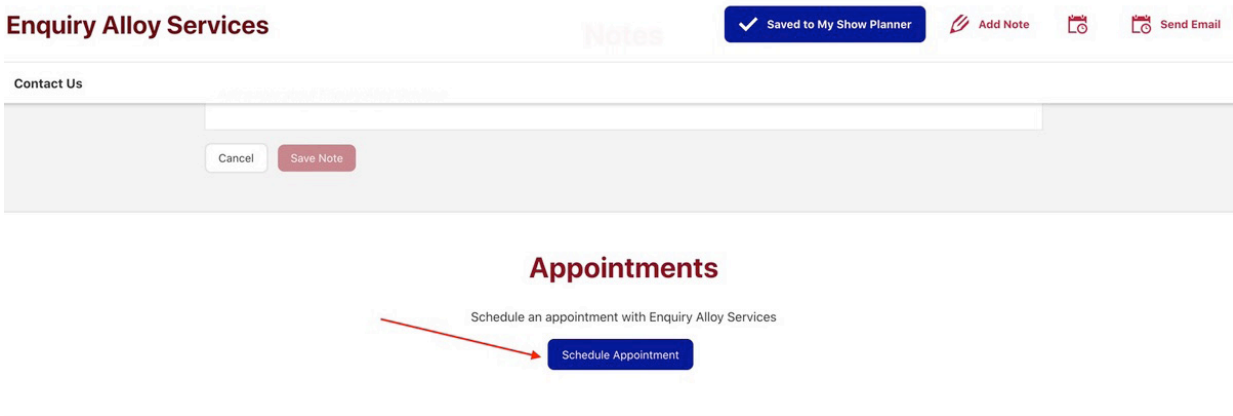
Reserving Appointments and Assigning Staff Members

When appointments have been added to your schedule, they will be available on your online listing for My Show Planner users to book.

Once an attendee books an appointment with your company you can assign a specific staff member to host that appointment through the Reservations link as described in the section below, or in bulk through Manage Existing Appointments detailed in the following section.

If you need to reserve a meeting on behalf of an attendee you can assign the staff member and the individual attendee through that same link. Follow the directions below to complete this process.

1. Click on the **Reservations** option next to an appointment.

2. Click on the **Reserve** option next to an open appointment.

3. When entering a staff member, you can choose an individual who has been previously added or enter a new staff member.

4. If the meeting location is virtual, you can enter a specific URL for that staff member to override the general virtual link entered during setup.

Enquiry Alloy Services

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Reserve Appointment
Appointment times are in Eastern Time (US & Canada)

Date:
Wed, Jan 12, 2022

Time:
9:30 am - 10:00 am

* Location:
336

Assign staff members to meet with this attendee:

Representative Name:
Note: Staff members that you've added may not appear immediately. Reload the staff member list.

Choose a Staff Member

+ Add a Staff Member

Notes:
Notes will not be shared with the attendee

5. Enter the attendee name, email, phone number, and company.

Add an Attendee

Attendee Name:

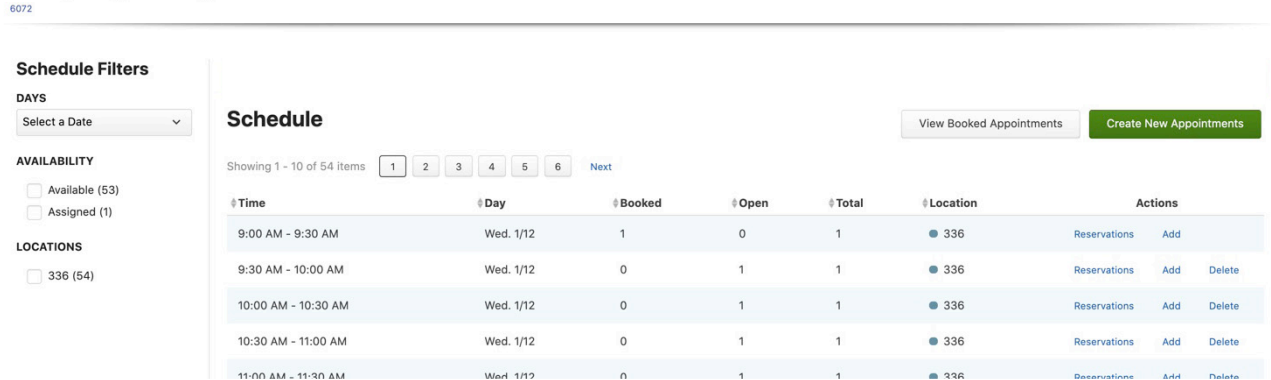**Attendee Email:**

Attendee Phone:

Attendee Company:

6. Once you have updated the information on this page, you will see the updates in real time on the appointment home page, the Meetings Scheduled area, and your online listing.

Managing Existing Appointments

1. All appointments created will display on the attendee scheduling home page. Use the filters on the left side of the screen to filter appointments by Days, Availability, and Locations.

2. To edit or add to an existing appointment, click the **Add** option under the Actions column. You can use this option at any time to update the appointment information, including the assigned staff members.

3. To delete an existing appointment, click the **Delete** option under the Actions column. A pop-up window will display requiring you to confirm.
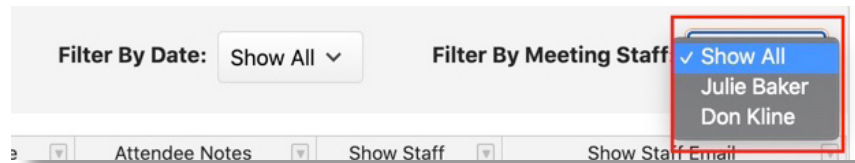
4. To edit multiple appointments at once, click the **View Booked Appointments** option to see all appointments listed within a spreadsheet format.

5. Use the filter options to filter by date and/or staff member assigned.

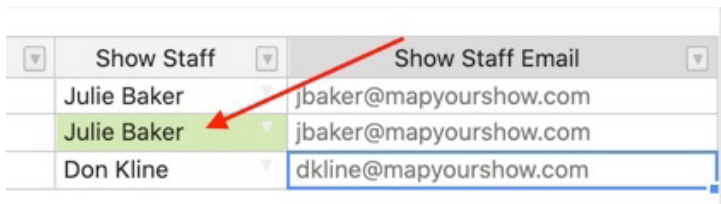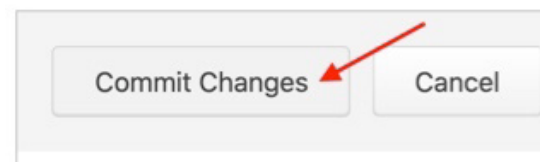6. Make changes within the spreadsheet by clicking each cell and editing. Once a change has been made, the cell will be highlighted in green. To save all changes, be sure to click the **Commit Changes** button at the top of the page.
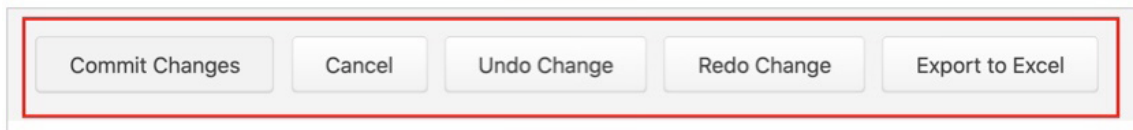

7. Use the other buttons at the top of the page to cancel, undo, or redo changes. You can also export the spreadsheet to Excel to save it to your device.