

# DIRECT SCHEDULING

The Go West Summit  
Appointment Process



# This Session Includes



SET YOUR BREAKS



SELECT COMPANIES



REQUEST  
APPOINTMENTS

# Set Your Breaks



- Log in
- Click **Appointments** in the Member Area Drop Down Menu
  - This option will not appear unless payment is received
- Click **Set My Breaks**
- Click the blocks of time to let the system know when you will be unavailable for an appointment

The screenshot shows the Go West Summit Member Area dashboard. At the top, there is a navigation bar with the Go West Summit logo, a search icon, and social media icons for Facebook, LinkedIn, YouTube, Instagram, and Twitter. Below the navigation bar, the page title is "Appointment Selections". A red "Subscribe" button is visible next to the text "Subscribe to receive email alerts when new companies register for Go West Summit".

The main content area features a blue box with white text displaying various statistics:

Companies Selected <b>10</b>	Requests Sent <b>0</b>	First Request Sent:
Avg. Selected <b>26.9</b>	Avg. Requests Sent <b>0.0</b>	Last Request Sent:
Requests Received <b>0</b>	Awaiting Replies <b>0</b>	Awaiting Your Reply <b>0</b>
Confirmed <b>0</b>	Declined <b>0</b>	Reschedules <b>0</b>
Total Appt. Slots <b>50</b>	Appt. Slots Remaining <b>50 (100%)</b>	Canceled <b>0</b>

A red "Cross-Reference Tool" button is located at the bottom right of the blue box.

Below the blue box, the text "Completed Steps: 100%" is displayed. A list of seven steps follows, with the first step, "1. Set My Breaks", circled in red:

1. Set My Breaks
2. Select Companies
3. Request Meetings with Companies and View Schedule
4. Respond to Requests
5. View Pending and Confirmed Requests
6. View Declined/Canceled/Expired Requests and Reschedules
7. Download Profiles



# Select Companies



- Click **Select Companies**
- Add companies to your Request List by clicking the company's name

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Appointments > Select Companies

### Select Companies

Select Companies You Want to Meet

**WELCOME SABRINA KASSAB -- YOU ARE LOGGED IN AS A BUYER**

[Hide Instructions](#)

IMPORTANT: Please review the [Appointment Selection Process](#) instructions before beginning.

Click the company name below to populate your appointment request list. All of the columns are sortable and every profile can be filtered to help you locate the perfect match. Simply click the column header, (Delegate Name, State or Country, etc.) to sort and use the filter tools below to improve your efficiency. After your request list is populated SAVE YOUR LIST and proceed to Request Meetings with Companies.

Save List Save / Exit Clear List

\* - a company has selected your company for an appointment selection.

#### Companies I Want to Meet 2 companies added

[Hide List](#)

Cherry Creek Shopping Center (S7298) Keach Molly CO	↑ ↓	<a href="#">Remove</a>   <a href="#">Details</a>   <a href="#">Availability</a>
Elko Convention & Visitors Authority (S7295) Lester Tom NV	↑ ↓	<a href="#">Remove</a>   <a href="#">Details</a>   <a href="#">Availability</a>

Save List Save / Exit Clear List 2 companies added

[Filter Companies](#)



# Select Companies



- Use the filters provided to make finding companies easier
- Click the **My Profile Matches** button to find companies that match information found in your profile
- Click the **Return to Original List** button to view all companies
- Click **Availability** to check that company's availability

Filter Companies

Filter By Criteria | My Profile Matches

Registered Companies

Company Name	Delegate Name	State/Province / Time Zone	Viewed	
<a href="#">Academy Museum of Motion Pictures (\$7251)</a>	Adalid, Rowena <a href="#">Markets</a>	CA	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">ACM: Hospitality &amp; Restaurants (\$7648)</a>	Alvarado, Jose <a href="#">Markets</a>	AZ	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">Aloft &amp; Element Hotels Redmond (\$7744)</a>	Bonet, Damon <a href="#">Markets</a>	WA	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">Alterra Mountain Company / Mammoth Resorts (\$7430)</a>	O'Farrell, Jenny <a href="#">Markets</a>	CO	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">Antelope Canyon Navajo Tours (\$7221)</a>	Etsitty, Dalvin <a href="#">Markets</a>	AZ	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">Antelope Canyon Tours (\$7217)</a>	Redshirt, Ryan <a href="#">Markets</a>	AZ	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>
<a href="#">Aquarium of the Pacific (\$7304)</a>	Brainard, Sarah <a href="#">Markets</a>	CA	Not viewed	<a href="#">Details</a> <a href="#">Availability</a>

# Request Appointments



- Click **Request Meetings**
- Open one of the four marketplaces by clicking one of the red **Marketplace** buttons

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Appointments > Request Meetings

### Request Meetings with Companies and View Schedule

- Available for Requests     - Unavailable     - Confirmed Request     - Pending Request     - Waiting for Reply

[Set My Breaks](#)

Confirmed 0    Pending 0 (0 Expired)    Awaiting Your Reply 0 (0 Expired)  
Reschedules 0    Declined 0    Canceled 0

Click on one of the Marketplace buttons below to make requests in that marketplace.

Marketplace 1 Tue, Feb 15	Marketplace 2 Tue, Feb 15	Marketplace 3 Wed, Feb 16	Marketplace 4 Wed, Feb 16
8:00 AM	1:00 PM	9:00 AM	1:15 PM - 2:15 PM Speed Appointment Session
8:12 AM	1:12 PM	9:12 AM	2:15 PM
8:24 AM	1:24 PM	9:24 AM	2:27 PM
8:36 AM	1:36 PM	9:36 AM	2:39 PM
8:48 AM	1:48 PM	9:48 AM	2:51 PM
9:00 AM	2:00 PM	10:00 AM	3:03 PM
9:12 AM	2:12 PM	10:12 AM	



# Request Appointments



- Click the **Find Companies** button on any of the time slots to start slotting appointments into place
- The Available Companies column lists all companies in your request list that are available to meet at that date and time
- Simply click the name of the company to request a meeting

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Appointments > Request Meetings > Marketplace

### Request Meetings with Companies

- Available for Requests     - Confirmed Request     - Waiting for Reply  
 - Unavailable     - Pending Request  
B - Buyer Pick    S - Supplier Pick    SY - System Pick

[Set My Breaks](#)    [Refresh Appointments](#)

Marketplace 1 Tue Feb 15 ▾  
<< Return to full schedule

\* - a company has selected your company for an appointment selection.

Marketplace 1 Tue, Feb 15	Available Companies	Unavailable Companies	Reschedule Requests
8:00 AM Unavailable	Awesome Shopping Mall Details View Availability	*Best Western Sheridan Center	No reschedules yet.
8:12 AM Unavailable	Berkeley Events & Conferences Details View Availability	<b>Pending/Confirmed Requests</b>	<b>Declined/Canceled Requests</b>
8:24 AM Unavailable	Best Western Plus Landmark Inn Park City Details View Availability	No pending or confirmed requests yet.	No declined or canceled requests yet.
8:36 AM <a href="#">FIND COMPANIES</a>	Bindlestiff Tours Details View Availability		
8:48 AM	Bluff Dwellings Resort / Wild Expeditions Details View Availability		
	Bryce Canyon Country Details View Availability		
	Carreras Tours LLC		



# Reviewing Requests



- Click any **Marketplace** button that shows pending requests
- Click the **Respond** button beside the blue pending request
- From there you can accept the request, decline the request, or suggest to meet at a different time
- You will have an opportunity to explain why you'd like to reschedule or decline each request

Meeting Time	Company	When Sent
Feb 15 1:00 PM	Acme Tour Operators <a href="#">Details</a>	Jan 13 8:04 AM

Reply to Appointment Request

Acme Tour Operators would like to meet with you on Feb 15 at 1:00 PM.

Accept the request  
 Decline the request  
 You want to meet at a different time

Please give a reason if you are declining the request or want to reschedule the appointment.

  




# Appointments Dashboard Key

Companies Selected **10**

Avg. Selected **30.2**

Requests Received **1**

Confirmed **0**

Total Appt. Slots **68**

Requests Sent **3**

Avg. Requests Sent **0.0**

Awaiting Replies **0**

Declined **0**

Appt. Slots Remaining **68 (100%)**

First Request Sent: **Jan 5**

Last Request Sent: **Jan 11**

Awaiting Your Reply **0**

Reschedules **0**

Cancelled **1**

Cross-Reference Tool

- **Companies Selected** shows how many companies are in your Select Companies list
- **Avg. Selected** is the current average for your registrant type (Buyer/Supplier/Media/Sponsor)
- **Requests Received** is a running total of how many requests you receive
- **Confirmed** shows how many appointments have been confirmed
- This registrants shows **68 Total Appointment Slots**
- This registrant has sent three appointment requests
- **Avg. Requests Sent** is the current average for your registrant type (Buyer/Supplier/Media/Sponsor)
- **Awaiting Replies** is the current number of requests you have sent that are pending. Pending requests expire 72 hours after being submitted.
- This person has zero **Declines**
- Since this registrant has zero confirmed appointments, all 68 appointment slots are still available.
- **First Request Sent** shows when your first request were sent
- **Last Request Sent** shows when your most-recent request was sent
- **Awaiting Your Reply** shows how many pending requests are awaiting your reply. Click the **Respond to Requests** link on your landing page to respond.
- **Reschedules** shows how many rescheduled appointments you have confirmed.
- **Cancelled** shows how many appointments have been canceled.
- **Cross Reference Tool** - Use this tool to be sure you've requested meetings with everyone on your list.

