PEF Scheduling Process Notes 2025

Accessing Scheduling Platform



- Oct. 31 @ 2:00 PM ET Scheduling Opens for Silver & Basic Level Partners
- Nov. 11 Team Member Registration Opens (must register to have access to hotel room block)
- Nov. 11 IFDA Hotel Room Block Opens (tiered opening)
- Dec. 9 Manufacturer Contract Balances Due
- Dec. 9 Manufacturer Hotel Forms Due
- Dec. 27 Team Member Registration Deadline
- Dec. 27 Housing Deadline for all Team Members

We will start by looking at the platform through the lens of a **Manufacturer Perspective** and then continue on from the distributor's perspective – we will show different features in each of these profiles.



When you first logon you arrive on your dashboard and you may see notifications for unread messages and pending appointments

	FDA PARTNERS EXECUTIVE FORUM	TP	E RITZ CARLTON GRAN	de lake 3 - 31 ,	S. ORLANDO, FL 2024			
	0 Scheduled					Additional O	ptions 🔳	
Stephenie Andrews								
	09	e the searc	h box below and the oriteria on the left side of	your screen to	identify profiles that you are interested i			
	Companyi Attendee Name v Modity Search	Search. A B		MNOI		م 🖩	ß	
Product.line(s)	Directory: All				[Print All]	[Print List]		
Deverapes 7								
Cleaning Supplies								
Condiments, Sauces, Sugars & Spices								
Eggs & Egg Products	Ajinomoto Foods North America, Inc.		Alpha Baking Company, Inc.	100	Beaver Street Fisheries	100		
Fats & Oils	Madefina Sanica Coordinator	6	National Sales Director	6	Execution Assistant	6		
Prozen Products	https://www.ajinomotofoodservi		https://www.alphabaking.com/		https://www.beaverstreetfisheri			
7 Fruits		_						
Grams ÷	Request Apparement	+	Request Apportment	+	Request Appointment.	+		.+.
Customer segment(s) served								1
Dusiness & Industry								
Chain Restaurants	Researce Tech		Butterball Facdatanian		C. H. Countries & Sea			
Convenience stores	Supplier Test	123	Robbie Mamula	050	Caroline Rodriguez	8		
Direct to Customers			Director, Distribution Sales		Sales & Marketing Coordinator			
			https://www.butterball.com/		https://chq.com/			

And I want to draw your attention to the **Support button** that is displayed in the lower right hand corner – if you have any technical challenges you can initiate a chat session with a support team from Bravura – our scheduling platform partner. They provide live chat support throughout the scheduling process as well as during the virtual components of the in-person meeting sessions in January/February.

Coror we aren't online at the	moment Please
sorry, we aren't online at the leave a messare and we'll ne	et back to you via a
ticket/email response.	2
Name	
Or social sign in:	G)
Phone Number (optional)	
Message	

Clicking on the Additional Options allows you to navigate to specific areas of the scheduling platform.



- **Partner Directory** allows you to search your trading partner profiles;
- My Schedule provides a calendar view of all your appointments;
- Message You can use the messages section to send communications to your trading partners;
- My Profile allows you to manage your organization company profile these are the same demographics that you have been updating over the past couple of weeks;

	Additional Options 🗙
ide	Partner Directory All (45) List of Companies Marked Hide My Schedule Calendar View
R	List View Appointments by Status (2) Messages (1)
Int	Announcements My Profile User Guide
Bra Bu	Support Sign Out
Sı ht	

We will start our overview looking at the Directory – where you can search and find additional details on your potential trading partners. The Directory is also where you can schedule and request appointments.

The directory is configured so that when a Manufacturer logs in, they are able to search Distributors, and conversely when a Distributor or Buying Group Member logs in they can search Manufacturers.

<u>Search by Company Name</u> – search the directory by company name - enter Gordon in the search box and click the Magnifying Glass to initiate the search

Company/Attendee Nam 🗸	Gordon										C	2	Ш	≣	K
Modify Search	АВС	DEF	GHI	J K	LM	N O	PC	R S	1	υvv	V Х У	Z			
Partner Directory: All							[Pri	nt All	1		[Pr	rint L	.ist]		
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Search on Demographics -

On the left side of the page, you have the ability to search on some other key demographics such as Market/Delivery Areas, Customer Segments Served, Product Lines, etc.

Let's search for a distributor that has a market/delivery area in the Upper-midwest and with customer segments served = Chain Restaurants – the system generates the results

	<u>Market/delivery_area(s)</u>	Cus	stomer segment(s) served
×	Clear	1	<u>populated)</u>
	Northeast	×	Clear
	Mid-atlantic	□ Re	Independent staurants
	Southeast	<	Chain Restaurants
	Southwest		Education
			Healthcare
✓	Upper mid-west		Travel & Leisure
	West coast		Business & Industry
	Pacific northwest		Retail
			Convenience

Manufacturers can search distributor profiles on both Market Delivery areas and Customer Segments Served. Distributors can search manufacturer profiles on both their Product lines and their broker coverage.

Clicking on the Company Name to open up and see additional profile details

Partner Directory: All [Print List]

Bravura Technologies ibrahim Abdurahman	123				Upper Lakes Foods Inc. Upper Lakes Schedu…
					Sr. Director, Sales http://www.upperlakesfoods.com
FL Request Appointment	+				Scheduled 🕂
	First	Previous	1	Next	Last

Page 4 of 17

These are the demographics that you have been updating the last couple of weeks. Likewise, you can also upload documents that are available for download for all trading partners to see.

<u></u>		Request Appointment	+	X
Company Name	Upper Lakes Foods Inc.		Market/delivery area(s) Upper mid-west	
Attendee Name	Upper Lakes Scheduler		Customer segment(s) served - by percent of sales (pre-populated)	
Email	<u>scheduler@ulfoods.com</u>		Independent Restaurants Chain Restaurants Education	
Title	Sr. Director, Sales		Travel & Leisure Retail Direct to Customers	
Att Time Zone Upload File Role Website Buying group affiliation	(GMT-05:00) Eastern Times US & Cana Click here to View document Scheduler <u>http://www.upperlakesfoods.com</u> u UP,DMA	ada)		

Requesting an Appointment with Upper Lakes

Direct from the Profile Page you can initiate an appointment request by clicking the Plus button

			Ļ
	14	Request Appointment	+
Company Name	Upper Lakes Foods Inc.	Market/	delivery area(s)
		Upper mid-wes	t
Attendee Name	Upper Lakes Scheduler	<u>Customer se</u>	<u>gment(s) served - by</u>
		percent of sa	ales (pre-populated)

This opens the Request Appointment window and click the Request Appointment button

Request Appointment	
Hide	
Excluded	
Request Appointment	

Select from any of the available time slots – if a time slot is not available – that time slot will not appear on the schedule – in this example there is no 10:00 am, 1:00 pm or 3:00 pm slot available - :

<u>Request A</u>	<u>ppointment</u>
Start time	End time
Jan 29, 07:00 AM	Jan 29, 08:00 AM
Jan 29, 08:00 AM	Jan 29, 09:00 AM
Jan 29, 09:00 AM	Jan 29, 10:00 AM
Jan 29, 10:00 AM	Jan 29, 11:00 AM
Jan 29, 11:00 AM	Jan 29, 12:00 PM
Jan 29, 12:00 PM	Jan 29, 01:00 PM
lan 29, 01:00 PM	lan 29, 02:00 PM
Jan 29, 02:00 PM	Jan 29, 03:00 PM
1 00, 00:00 DL4	1

A quick note about appointment times – the **Appointments time slots are the same for all three days of the Forum** – each appointment will show as an hour in the "Request Appointment" window – but they are actually 50 minute meetings with a 10 minute interval to transfer in between appointments.

And likewise on Wednesday we have our abbreviated meetings to 40 minutes – 30 minutes for the meeting and 10 minutes to transfer to your next appointment.

Request /	<u>Appointment</u>
Start time	End time
Jan 30, 12:00 PM	Jan 30, 01:00 PM
Jan 30, 01:00 PM	Jan 30, 02:00 PM
Jan 30, 02:00 PM	Jan 30, 03:00 PM
Jan 30, 03:00 PM	Jan 30, 04:00 PM
Jan 30, 04:00 PM	Jan 30, 05:00 PM
Jan 31, 07:00 AM	Jan 31, 07:40 AM
Jan 31, 07:40 AM	Jan 31, 08:20 AM
Jan 31, 08:20 AM	Jan 31, 09:00 AM
Jan 31, 09:00 AM	jan 31, 09:40 AM
Jan 31, 09:40 AM	Jan 31, 10:20 AM
Jan 31, 10:20 AM	Jan 31, 11:00 AM
Jan 31, 11:00 AM	Jan 31, 11:40 AM
	1

Select your time slot and you are asked to click "Yes" to confirm



And that completes your request which will now display in your trading partners dashboard as a "Pending Appointment" notification.



Pending Appointments are also hidden from the list of available appointment times for the next trading partner.

You don't have to drill into the profile to request an appointment, you can also click on the Plus button right from the Directory.

Company/Attendee Nam 🗸	Search	n		Q III
Modify Search	A B	CDEFGHIJKLMNO	PQRSTU	V W X Y Z
Partner Directory: All			[Print All]	[Print List]
Ben E. Keith Foods		BiRite Foodservice Distrib.	Bravura 1	echnologies LLC.
Ben E. Keith Foods Kathy Whalen	\boxtimes	BiRite Foodservice Distrib. Tom Whiteside	Bravura 1	echnologies LLC. vura UserB… 🖂
Ben E. Keith Foods Kathy Whalen Assistant		BiRite Foodservice Distrib. Tom Whiteside	Bravura 1 BuyerBra SupportBr	echnologies LLC. vura UserB… ⊠ avura
Ben E. Keith Foods Kathy Whalen Assistant http://www.benekeith.com		BiRite Foodservice Distrib. Tom Whiteside	Bravura T BuyerBra SupportBr https://bra	echnologies LLC. vura UserB 🕅 avura avuratechnologies.co

Click on the Ben E. Keith Foods and initiate an appointment request

Accepting or Declining Appointments

Lorisa Gutlerrez	0 Scheduled Pending Appointment(s)				Additional Options
	Company/Attendee Name V Se Modify Search	arch B C D E P G H I J K I	M N O	P Q R S T U V W	Щ Ⅲ ☑ Ø
Marketidelivery_area(s)	Directory: All			[Print All]	[Print List]
Mid Atlantic					
Pacific Northwest					la Ia
Southeast	Ace Endico Corp. Andrea Matra	BiRite Foodservice Distributors Stephenie Andrews		Bravura Tech Buyer Test	
Upper Midwest	Purchasing Department https://www.aceendico.com/	Director of Category Management https://birite.com/			
West Coast					
WestCoast	Request Appointment	Requested	+	Request Appointment	+
Customer segment(s) served Business & Industry					
Chain Restaurants	Chestab Tasbaelasias	City Line Distribution		Curtre Food Perulas	
Convenience stores	Michael Cala	Robert Berkowitz		Janet Dennen	
Direct to Customers	Head of Purchasing and Catego	President		VP, Marketing Procurement	

In this example, our scheduler sees two notifications on your dashboard – one for unread messages and one for any pending appointments. It also displays the total number of appointments scheduled.

As you go through the scheduling process next week, you'll want to **monitor your pending** appointments and work through the queue so that available time slots will appear as available to your trading partners - otherwise it can have a ripple effect on the entire scheduling process.

Clicking on the Pending Appointments brings you to the Pending Approval lists where you can manage all your appointment requests. You actually have three options:

- 1. Accept the appointment request
- 2. Decline the appointment request
- 3. Or a new option this year the ability to Decline and Reschedule the appointment

Pen App	ding roval			Appointments	Pending Appro 👻 💾
Date	Time	Status	Requested by	Appointment with	
Feb 01, 2022	12:00 PM - 12:50 PM	Requested	Cash-Wa Distributing: Cash-Wa Scheduler	Conagra Foodservice: Scheduler	Accept / Decline / Decline and Reschedule Appointment
Feb 02, 2022	10:00 AM - 10:50 AM	Requested	City Line Distributors: Robert Berkowitz	Conagra Foodservice: Scheduler	Accept / Decline / Decline and Reschedule Appointment

We'll go ahead and "Accept" both appointments - Once you make your choice the appointment is removed from the Pending Approval list

Distributor Perspective

Let's move on to our next section – logging on as a Distributor

On your dashboard you can see the "Pending Appointments" notification. In our previous section we clicked thru on the notification, this time we're going to use the "Calendar View" to manage our pending requests.

O Schedule O	Ē	IFDA PARTNERS EXECUTIVE FORUM		THE RITZ CARLTON GRA	NDE LAI 28 - 3	kes, orlando, fl 1, 2024	i
Use the search box below and the criteria on the left side of your screen to identify profiles that you are interested in. Image: Company/Attender Name Image: Company, Inc. Image: Company, Inc. Alpha Baking Company, Inc. Image: Company, Inc.	-	0 Scheduled Unread Message(s) ① Pending) Appoin	itment(s) 3			Additional Options
Modify Search A & C O C F O H I I K L M N O O O R T I V V X Y 2 Product line(s) Directory: All [Print List] Decarges Ocontenets, Sauces, Sugars & Specs Alpha Baking Company, Inc. Beaver Street Fisheries Continents, Sauces, Sugars & Specs Alpha Baking Company, Inc. Beaver Street Fisheries State of the Continent of the Contenet of the Continent of the Continent of th		Use Company/Attendee Name	Search.	h box below and the criteria on the left side of	rour screen to	identify profiles that you are interested i	Q. Ⅲ ≡ 2
Beverages ○ (stamps Supplies)	Product line(s)	Modify Search Directory: All	A B	CQEEGHIIKL	M N Q I	PQBSTUVWX [Print All]	Y Z
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Condiments, Sauces, Sugar & Spices Eggs & Egg Products Eggs & Egg Products Eggs & Egg Products Eggs & Egg Products Finzan Products Finzan Products Finzan Products Finzan Products Finzan Products Finzan Request Appointment Finzan Products Finzan Product	Cleaning Supplies						
Eggs & Egg Products Ajinomato Foods North America, Inc. Alpha Baking Company, Inc. Beaver Street Fleheries Fask & Ois Mark Marcucci Mark Marcucci Risa Whittow Image: Street Street Fleheries Frozen Products Mark Marcucci Mark Marcucci Risa Whittow Image: Street Street Fleheries Frozen Products Mark Marcucci Mark Marcucci Risa Whittow Image: Street Street Fleheries Frozen Products Mark Marcucci Mark Marcucci Risa Whittow Image: Street Street Fleheries Frozen Products Mark Marcucci Mark Marcucci Image: Street Street Fleheries Image: Street Street Fleheries Grains Request Appointment Https://www.alphabaking.com/ Image: Street Street Fleheries Image: Street Street Fleheries Grains Request Appointment Image: Street Street Fleheries Request Appointment Image: Street Street Fleheries Grains Image: Street Street Fleheries Request Appointment Image: Street Street Fleheries Image: Street Street Fleheries Grains Image: Street Street Fleheries Request Appointment Image: Street Street Fleheries Grains Image: Street Street Fleheries Image: Street Street Fleheries Image: Street Street Fleheries Grains Image: Street Street Fleheries Image: Street Street Fleheri	Condiments, Sauces, Sugars & Spices						
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Fuils Enguest Appointment Request Appointment Request Appointment Grains Request Appointment Request Appointment Guidsmer Leguest Appointment Requidsmer Leguest Appointment	Fats & Otts Frozen Products	Marketing Service Coordinator https://www.ajinomotofoodservi		National Sales Director https://www.alphabaking.com/		Executive Assistant https://www.beaverstreetfisheri	
Guidatimer segment(s) served Business & Industry Chain Restaurants Convenience stores Bravura Tech Butter/ball Foodservice C.H. Guenther & Son Convenience stores Supplier Test Directive Outfouries Directive Distribution Sales	Fruits	Request Appointment	+	Request Appointment	+	Request Appointment	+
Drawn restautients Bravura Tech Butterhall Foodservice C.H. Guenther & Son Convertence stores Supplier Test Robbie Mamula Caroline Rodriguez Caroline Rodriguez <td< td=""><td>Customer segment(s) served</td><td></td><td></td><td></td><td></td><td></td><td></td></td<>	Customer segment(s) served						
Supplier Test Robbie Mamula Caroline Rodriguez Caroline Rodriguez Director Outstances Sales & Marketing Coordinator		Bravura Tech		Butterball Foodservice	_	C.H. Guenther & Son	_
Director, Distribution Sales Sales & Marketing Coordinator	Direct to Curtamore	Supplier Test	\bowtie	Robbie Mamula		Caroline Rodriguez	
https://www.butterball.com/ https://chg.com/				https://www.butterball.com/		sales & Marketing Coordinator https://chg.com/	

Calendar View - We just saw how you can click on the pending appointments – this time I am going to access the calendar from the Additional Options >> My Schedule >> Calendar View

The legend provides color codes for the appointments – green for a completed scheduled appointment, yellow for no appointment.

Electric de la construcción			Additional Participa
Note: Second Control Image: Second Control		0 Scheduled	Annual Obras
LUINO UNINO Development for Normal State S		- Pending Systemetrics 💿	
Supervised Testeday Supervised Factor	LEGEND IX on calendar tox to see apportment details	January 30, 2024	(Equat Calendar) (Prior Ard) (Prior Profiles) (Approximants by Status) 🛅 🧱
No.Appointent free Part Manufacture Totel Part Na.Matter Stateling Part Na.Matter Statelin	Apportment Scheduled NO APPOINTMENT SCHEDULED		Tuesday
Barn NR. SSING APTOR/MENT STOREGARD Barn NR. SSING APTOR/MENT STOREGARD Barn NR. SSING APTOR/MENT STOREGARD	Deart Schaduling Deart Schaduling Imported by Ma Imported by An	ram 2883.50.4956065.2048048	•
Start 10-13 88th Fastar-se Julitates States Astron		Ram KR. 335247987987504348	Øner
		Barn 18-13 Mile Fasterice Johnson Reprint Antonio	
		- Barn 1-12 Mitte Fastan op Softstaten Saptema Antone	

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Clicking the



Allows you to toggle between a detail and summary view – clicking the bars changes the view to summary

		Monda	ıy
Date	Time	Slot	Appointment
Jan 31, 2022	07:00 AM - 08:00 AM	1	NO APPOINTMENT Scheduled
Jan 31, 2022	08:00 AM - 09:00 AM	2	NO APPOINTMENT Scheduled
Jan 31, 2022	09:00 AM - 10.00 AM	3	NO APPOINTMENT Scheduled
Jan 31, 2022	10:00 AM - 11:00 AM	4	NO APPOINTMENT Scheduled
Jan 31, 2022	11:00 AM - 12:00 PM	5	NO APPOINTMENT Scheduled
Jan 31, 2022	12:00 PM 01:00 PM	6	NO APPOINTMENT Scheduled
Jan 31, 2022	01:00 PN - 02:00 PM	7	NO APPOINTMENT Scheduled
Jan 31, 2022	02:00 P /1 - 03:00 PM	8	NO APPOINTMENT Scheduled
Jan 31, 2022	03:00 / M - 04:00 PM	9	NO APPOINTMENT Scheduled
Jan 31, 2022	04:00 PM - 05:00 PM	10	NO APPOINTMENT Scheduled

And then click on "Next" to navigate to the next day/

You can see Conagra Foodservice – review the Direct Scheduling code – red = requested, pending my approval – **remember that pending appointment time slots remain unavailable to other trading partners**.

Click to JOIN virtual meeting			Tuesda	ay .
Appointment Scheduled NO APPOINTMENT	Date	Time	Slot	Appointment
SCHEDULED	Feb-01, 2022	07:00 AM - 08:00 AM	1	NO APPOINTMENT Scheduled
Non-Appointment Time	Feb-01, 2022	DEIDD AM - DHIDD AM	2	NO APPOINTMENT Scheduled
	Ph 91, 2022	09-00 AM - 10-00 AM	3	NO APPONTMENT Scheduled
Constant Sector Sector	eb-01, 2022	10:00 AM - 11:00 AM	4	NO APPOINTMENT Scheduled
preci schedung	46-01, 2022	11:00 AM - 11:50 AM	5	Conagra Foodservice: Scheduler
Requested By Me	4-91, 2022	12:00 PM - 01:00 PM	6	NO APPOINTMENT Scheduled
Requested, Pending My	++-01, 2022	011:00 PM - 02:00 PM	7	NO APPOINTMENT Scheduled
Approval	eb-01, 2022	02:00 PM - 03:00 PM		NO APPOINTMENT Scheduled
	44-01.2022	03.00 PM - 04.00 PM	9	NO APPOINTMENT Scheduled
downed Rose Acce	Feb-01.2022	04.00 PM - 05.00 PM	10	NO APPOINTMENT Scheduled

Click on the Conagra link in the Appointment column

Appointment With: Conagra Foodservice: Scheduler Date: January 30, 2024 O Time: 11:00 AM - 11:50 AM Click here for quick tips or Virtual Meetings. Decline Appointment Decline and Reschedule Appointment Accept Appointment

And from here, you can also accept the appointment – click Accept Appointment

This then changes the Appointment to "green" for accepted and scheduled.

		Tuesda	ау
Date	Time	Slot	Appointment
Feb 01, 2022	07:00 AM - 08:00 AM	1	NO APPOINTMENT Scheduled
Feb 01, 2022	08:00 AM - 09:00 AM	2	NO APPOINTMENT Scheduled
Feb 01, 2022	09:00 AM - 10:00 AM	3	NO APPOINTMENT Scheduled
Feb 01, 2022	10:00 AM - 11:00 AM	4	NO APPOINTMENT Scheduled
Feb 01, 2022	11:00 AM - 11:50 AM	5	Conagra Foodservice: Scheduler
Feb 01, 2022	12:00 PM - 01:00 PM	6	NO APPOINTMENT Scheduled
Feb 01, 2022	01:00 PM - 02:00 PM	7	NO APPOINTMENT Scheduled
Feb 01, 2022	02:00 PM - 03:00 PM	8	NO APPOINTMENT Scheduled
Feb 01, 2022	03:00 PM - 04:00 PM	9	NO APPOINTMENT Scheduled
Feb 01, 2022	04:00 PM - 05:00 PM	10	NO APPOINTMENT Scheduled

Decline & Reschedule

Back on the Pending Approval screen – for the Ventura Foods appointment we're going to select the Decline and Reschedule Feature – this is a new feature that we worked with Bravura to enhance the scheduling platform to allow for a decline and reschedule in one step instead of two as it was last year.

Pen App	nding proval		Appointments	Pending Appr 👻 💾	
Date	Time	Status	Requested by	Appointment with	
an 31, 2022	03:00 PM - 03:50 PM	Requested	Sara Lee Frozen Bakery: Lauren Mejia	Upper Lakes Foods Inc.: Upper Lakes Scheduler	Accept / Decline / Decline and Reschedule Appointment
eb 01, 2022	08:00 AM - 08:50 AM	Requested	Ventura Foods, LLC: Terri Kersavage	Upper Lakes Foods Inc.: Upper Lakes Scheduler	Accept / Lecline / Decline and Respectule Appointment
eb 01, 2022	02:00 PM - 02:50 PM	Requested	Georgia-Pacific: Brooke McKillop	Upper Lakes Foods Inc.: Upper Lakes Scheduler	Accept 7 Decline 7 Decline and Reschedule Appointment

Click the Decline and Reschedule option – users must select one of the Declined Reasons or enter a note in the "Other" field

Please	e declare the reason for declining request:	Ŷ
	Companies not aligned	
	Unable to accept additional appointments	
	Currently adjusting schedule, will reach out if the time slot becomes available	
\checkmark	Time slot not currently available	
Oth	er:	1

We'll choose the "Time Slot not currently Available" reason and click the Decline and Reschedule Appointment button.

This opens the Reschedule Appointment window with the list of available time slots with your trading partner and can select a new appointment time – your trading partner will then receive the "Pending Appointments" notification and they can accept or decline the request.

<u>Request A</u>	<u>ppointment</u>
Start time	End time
Jan 29, 07:00 AM	Jan 29, 08:00 AM
Jan 29, 08:00 AM	Jan 29, 09:00 AM
Jan 29, 09:00 AM	Jan 29, 10:00 AM
Jan 29, 10:00 AM	Jan 29, 11:00 AM
Jan 29, 11:00 AM	Jan 29, 12:00 PM
Jan 29, 12:00 PM	Jan 29, 01:00 PM
lan 29. 01:00 PM	lan 29, 02:00 PM
Jan 29, 02:00 PM	Jan 29, 03:00 PM
1 00 00:00 DL4	1 00 04-00 DL4

You'll be asked to confirm by clicking 'Yes'

Do you want to request an appointment with Sysco Corporation: Angela Hill on Jan 31, 01:00 PM? Select YES to request the appointment or NO to cancel this request.



One final note about the "Calendar View" you can easily export your calendar by clicking "Export Calendar"

prev	January 30, 2024	next Export Calendar Print All Print Profiles	≣
		Tuesday	
			•

Blocking a Time Slot

If there are any appointment slots that your team is not available, you can click the "Block" icon on the calendar view

(prev	January 30, 2024	next Export Calendar Print All Print Profiles Appointments by Status	
			Monday	
		7:00 - 8:00 NO APPOINTMENT Scheduled		
	/am	7.00-8.00 NO AFFORTMENT Scheduled		BLOCK

You can provide a title, description and confirm the time slots and click Block – now that time slot will not show in the Request Appointments window

	Block Time Slot	×
🛔 Title		
NOT AVAILAB	BLE	
	I	
		87/100
Description		
Enter Descrip	tion	
		1
Date: Ian 3	1. 2022	100/100
Start Time:		
07:00 AM		1
End Time:		
08:00 AM		1
	Block	
		Close

Messages

The scheduling platform offers a number of ways to communicate with one another – and we'll take a moment to review some quick features. We also worked with Bravura to enhance the Messaging system and we'll review those features here

Direct from the profiles, users can click the email icon on the company profile title bar to launch an email

Company/Attendee Nam 🗸 conag	a	Q Ⅲ≣ Ø
Modify Search A B	DEFGHIJKLMNOPQRSTU	V W X Y Z
Distributer Directory: All	[Print All]	[Print List]
	Conagra Foodservice	
	Conagra Foodservice	la A
	Conagra Foodservice Scheduler	l≩
	Conagra Foodservice Scheduler	R

Fill in the Subject, message and add an optional attachment. Click Send when done; we also saw in the previous session the New message notification.

Ŧ

Send Message ×				
To:	Scheduler			
From:	scheduler@ulfoods.com			
Subject: Reschedule - A Better Time				
Message:				
Would you like to be able to move our meeting to Wednesday				
1	No file selected. Remove Attachment Add Attachment Se	end		

You can also access your mailbox from the Additional Options menu and select Messages

	Distributor Directory
	All (44)
	List of Companies Marked Hide
N	/ly Schedule
	Calendar View
	List View
	Appointments by Status
Ν	Aessages رائم
A	nnouncements
Ν	ly Profile
ι	Jser Guide
s	Support
s	Sign Out

Remember that if you have an unread message you will also see a notification on your dashboard when logging in and can click thru

0 Sched	uled	
Unead Message(s) 3	Pending Appointment(s) 4	
Upper Lakes Scheduler	0 Scheduled Unread Message(s) Pending Appointment(s)	
From	Subject	Received
Ventura Foods, LLC: Terri Kersavage	Pending Request	Oct 20, 2021 10:14 am
Georgia-Pacific: Brooke McKillop	Reschedule	Oct 20, 2021 10:12 am
Sara Lee Frozen Bakery: Lauren Mejia	Can we meet this year?	Oct 20, 2021 10:11 am

Click on any of the Message to review details and rely

jeet : Can we meet this year?	Respond:
Lauren Mejia	O 6 Minutes aga
discuss?	appenninitent car team to
	Send Response

Add an attachment if you want – a limit of 50 MB on each attachment – Complete your response and click the "Send Response" button

If you click on any of the messages you can see a thread of all the communications



Compose New Message

To compose a new message - click the Compose button

In the recipients search, type to find the attendee you are looking to message with

Send	Add Attachment	Remove Attachment	No file selected.
Type to	select recipient(s)		
Enter n	nessage subject		
Enter m	nessage body		

Start typing the Company Name allows you to find the recipient – tip – they are listed first by company and that will be quickest way to find the recipient.



Enter a subject line and compose the message

Send Add Attachment	Remove Attachment	No file selected.
Gordon Food Service: She	elby Conant	
Schedule Status		
We have a couple of outstan	iding requests, can we talk I	about confirming one of the dates?

Add an attachment if you would like – 50 MB limit on attachments

Click Send to send the message.