

PEF Scheduling Process Notes 2025

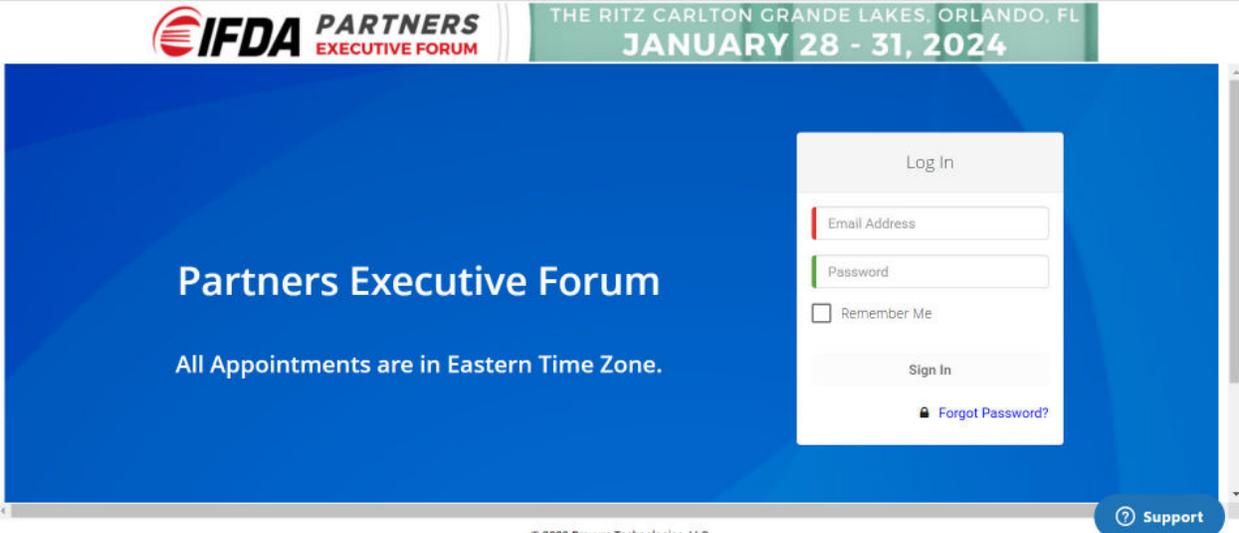
Accessing Scheduling Platform



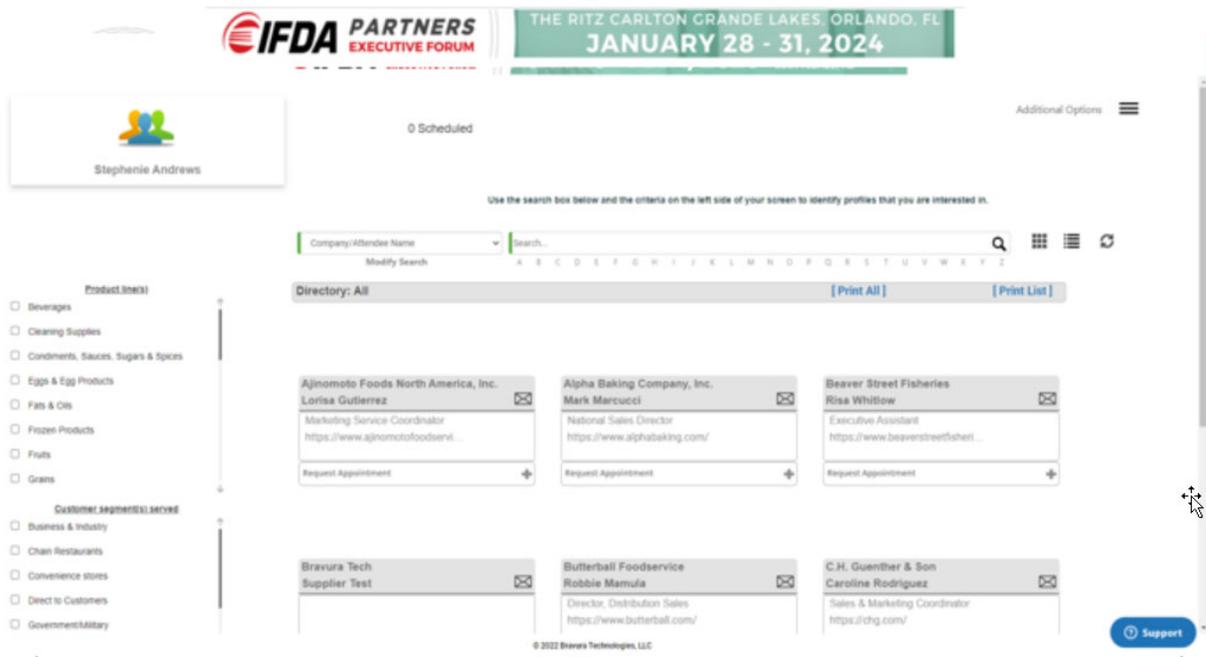
Key Dates

- Oct. 30 @ 2:00 PM ET** Scheduling Opens for Distributors and Platinum & Gold Level Partners
- 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

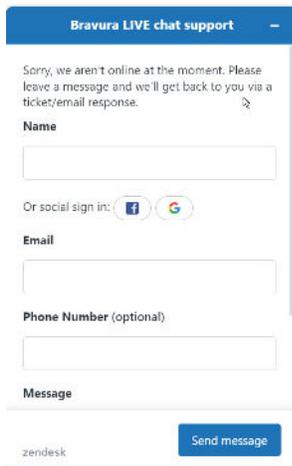
We will start by looking at the platform through the lens of a **Manufacturer Perspective** and then continue on from the distributor’s perspective – we will show different features in each of these profiles.



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



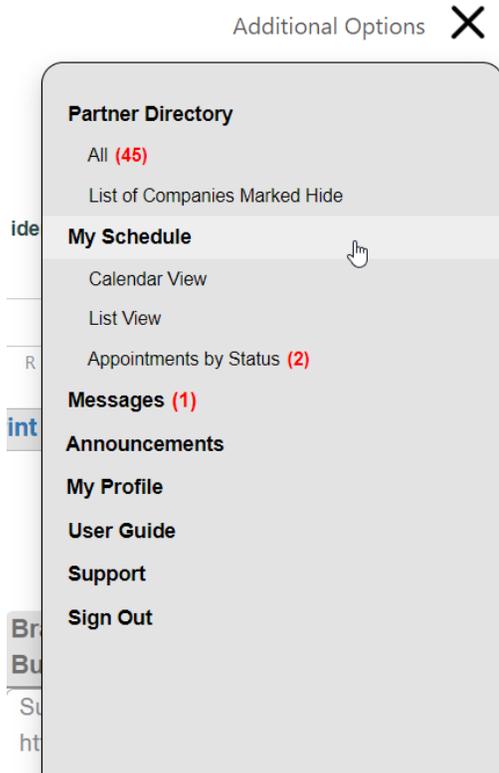
And I want to draw your attention to the **Support button** that is displayed in the lower right hand corner – if you have any technical challenges you can initiate a chat session with a support team from Bravura – our scheduling platform partner. They provide live chat support throughout the scheduling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



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;



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.

[Search by Company Name](#) – search the directory by company name - enter Gordon in the search box and click the Magnifying Glass to initiate the search



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>	<u>Customer segment(s) served</u> <u>by percent of sales (pre-populated)</u>
<input checked="" type="checkbox"/> Clear	<input checked="" type="checkbox"/> Clear
<input type="checkbox"/> Northeast	<input type="checkbox"/> Independent Restaurants
<input type="checkbox"/> Mid-atlantic	<input checked="" type="checkbox"/> Chain Restaurants
<input type="checkbox"/> Southeast	<input type="checkbox"/> Education
<input type="checkbox"/> Southwest	<input type="checkbox"/> Healthcare
<input checked="" type="checkbox"/> Upper mid-west	<input type="checkbox"/> Travel & Leisure
<input type="checkbox"/> West coast	<input type="checkbox"/> Business & Industry
<input type="checkbox"/> Pacific northwest	<input type="checkbox"/> Retail
	<input type="checkbox"/> 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 [\[Print All \]](#) [\[Print List \]](#)

Bravura Technologies123
ibrahim Abdurahman 

FL

Request Appointment 

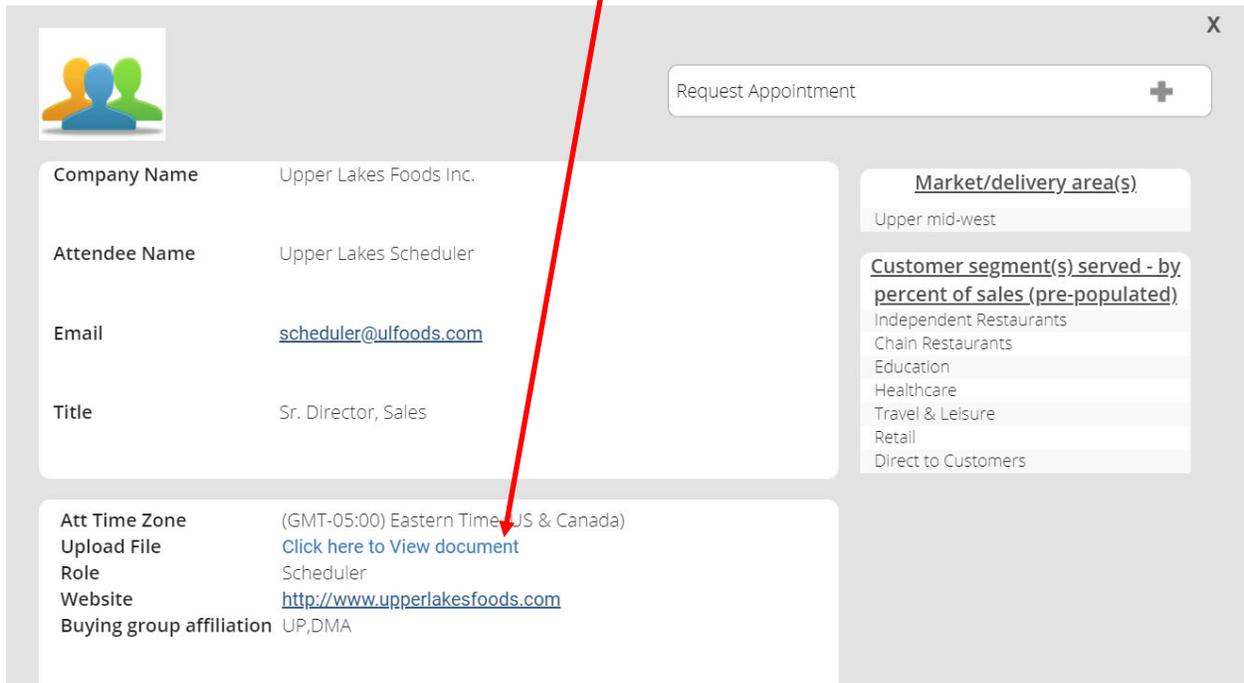
Upper Lakes Foods Inc.
Upper Lakes Schedu... 

Sr. Director, Sales
<http://www.upperlakesfoods.com>

Scheduled 

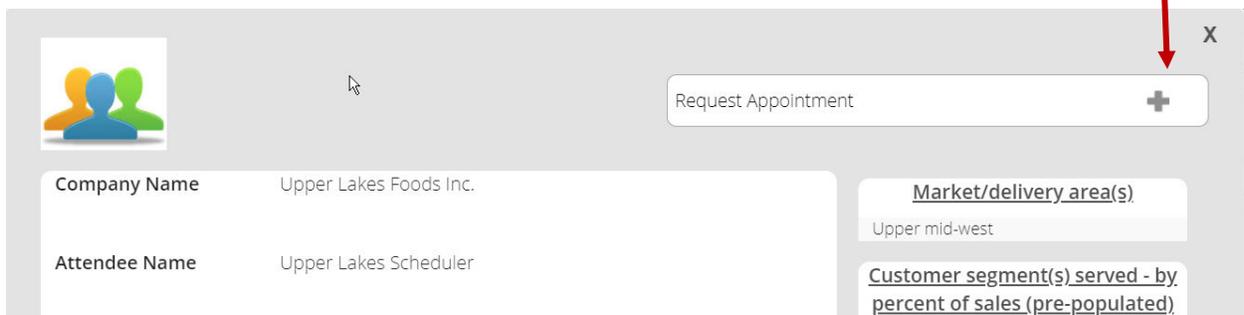
First Previous **1** Next Last

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.

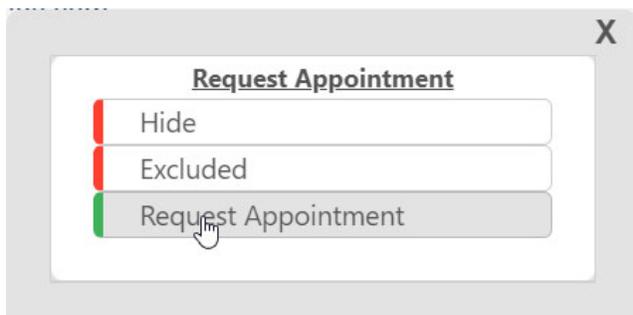


Requesting an Appointment with Upper Lakes

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



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



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 - :

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
Jan 29, 01:00 PM	Jan 29, 02:00 PM
Jan 29, 02:00 PM	Jan 29, 03:00 PM

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.

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

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

Do you want to request an appointment with Upper Lakes Foods Inc.: Greg Whitney on Feb 01, 11:00 AM?
Select YES to request the appointment or NO to cancel this request.

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

[Modify Search](#) A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Partner Directory: All [\[Print All \]](#) [\[Print List \]](#)

Ben E. Keith Foods Kathy Whalen <input type="button" value="✉"/>	BiRite Foodservice Distrib... Tom Whiteside <input type="button" value="✉"/>	Bravura Technologies LLC. BuyerBravura UserB... <input type="button" value="✉"/>
Assistant http://www.benekeith.com	VP, Purchasing http://www.biritefoodservice.com	SupportBravura https://bravuratechnologies.co...
Request Appointment <input type="button" value="⊕"/>	Request Appointment <input type="button" value="⊕"/>	Request Appointment <input type="button" value="⊕"/>

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

Accepting or Declining Appointments

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

Pending Approval 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.

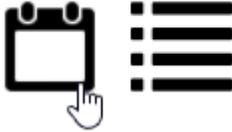
The screenshot shows the distributor dashboard for the IFDA Partners Executive Forum. The header includes the event name and dates: 'IFDA PARTNERS EXECUTIVE FORUM' and 'THE RITZ CARLTON GRANDE LAKES, ORLANDO, FL JANUARY 28 - 31, 2024'. The dashboard features a '0 Scheduled' notification, buttons for 'Unread Message(s)' and 'Pending Appointment(s)', and a search bar. A sidebar on the left lists 'Product line(s)' and 'Customer segment(s) served'. The main content area displays a directory of distributors with contact information and 'Request Appointment' buttons.

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.

The screenshot shows the distributor dashboard for the IFDA Partners Executive Forum, specifically the 'Calendar View' for January 30, 2024. The calendar displays a grid with columns for '7:00 AM', '8:00 AM', '9:00 AM', and '10:00 AM'. A legend on the left explains the color coding: green for 'Appointment Scheduled', yellow for 'NO APPOINTMENT SCHEDULED', and red for 'Non-Appointment Time'. The calendar shows several appointments scheduled for 7:00 AM, 8:00 AM, and 10:00 AM.

Clicking the



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

prev January 30, 2024 next Export Calendar Print All Print Profiles Appointments by Status

Monday			
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 PM - 02:00 PM	7	NO APPOINTMENT Scheduled
Jan 31, 2022	02:00 PM - 03:00 PM	8	NO APPOINTMENT Scheduled
Jan 31, 2022	03:00 PM - 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.

LEGEND

- Click on calendar row to see appointment details
- Click to JOIN virtual meeting
- Appointment Scheduled
- NO APPOINTMENT SCHEDULED
- Non-Appointment Time

Direct Scheduling:

- Requested By Me
- Requested, Pending My Approval

Current Time Zone: Eastern Time (US & Canada)

prev January 30, 2024 next Export Calendar Print All Print Profiles Appointments by Status

Tuesday			
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

Click on the Conagra link in the Appointment column

Appointment

Appointment With: Conagra Foodservice: Scheduler

Date: January 30, 2024

Time: 11:00 AM - 11:50 AM

Click here for quick tips on [Virtual Meetings](#).

Decline Appointment

Decline and Reschedule Appointment

Accept Appointment

Questions

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

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

prev January 30, 2024 next Export Calendar Print All Print Profiles Appointments by Status

Tuesday			
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

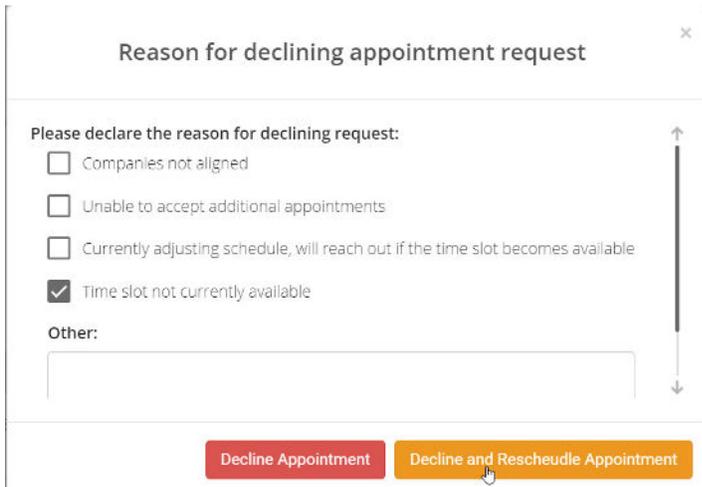
Back on the Pending Approval screen – for the Ventura Foods appointment we’re going to select the Decline and Reschedule Feature – this is a new feature that we worked with Bravura to enhance the scheduling platform to allow for a decline and reschedule in one step instead of two as it was last year.

Pending Approval

Appointments Pending Appr

Date	Time	Status	Requested by	Appointment with	
Jan 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
Feb 01, 2022	08:00 AM - 08:50 AM	Requested	Ventura Foods, LLC: Terri Kersavage	Upper Lakes Foods Inc.: Upper Lakes Scheduler	Accept / Decline / Decline and Reschedule Appointment
Feb 01, 2022	02:00 PM - 02:50 PM	Requested	Georgia-Pacific: Brooke McKillop	Upper Lakes Foods Inc.: Upper Lakes Scheduler	Accept / Decline / 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



Reason for declining appointment request

Please declare the reason for declining request:

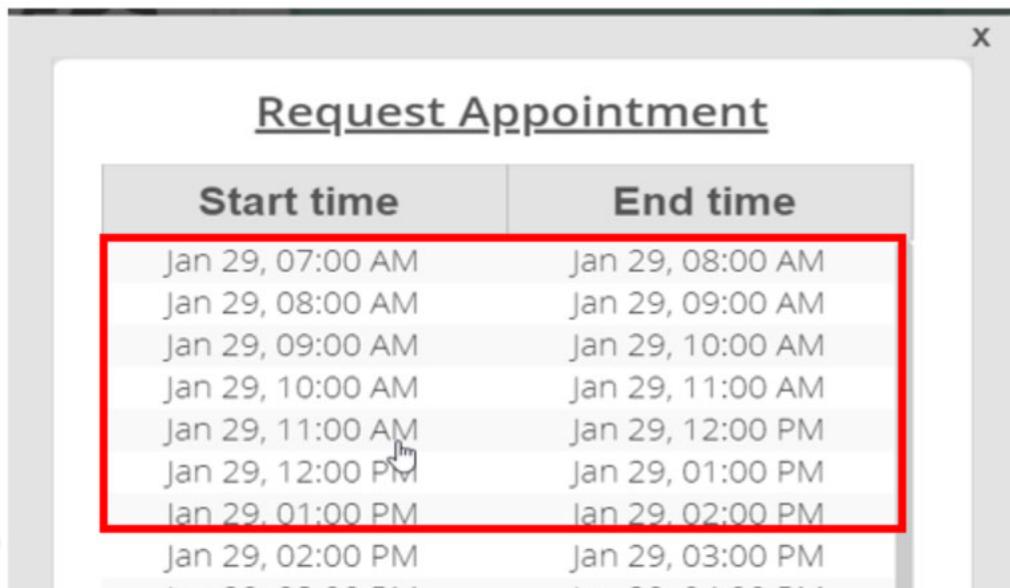
- Companies not aligned
- Unable to accept additional appointments
- Currently adjusting schedule, will reach out if the time slot becomes available
- Time slot not currently available

Other:

Decline Appointment Decline and Reschedule Appointment

We’ll choose the “Time Slot not currently Available” reason and click the Decline and Reschedule Appointment button.

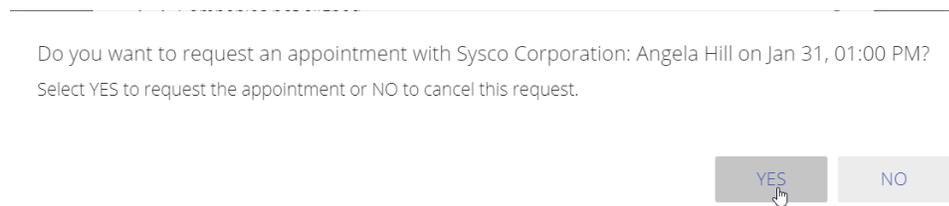
This opens the Reschedule Appointment window with the list of available time slots with your trading partner and can select a new appointment time – your trading partner will then receive the “Pending Appointments” notification and they can accept or decline the request.



Request Appointment

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
Jan 29, 01:00 PM	Jan 29, 02:00 PM
Jan 29, 02:00 PM	Jan 29, 03:00 PM

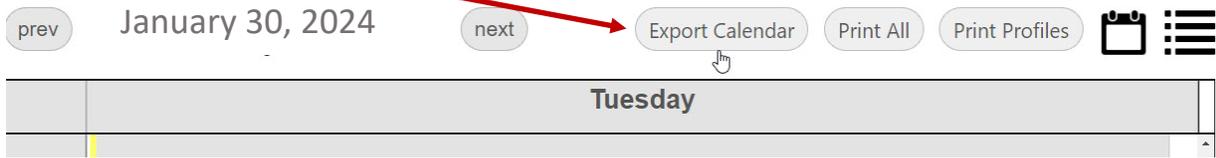
You’ll be asked to confirm by clicking ‘Yes’



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.

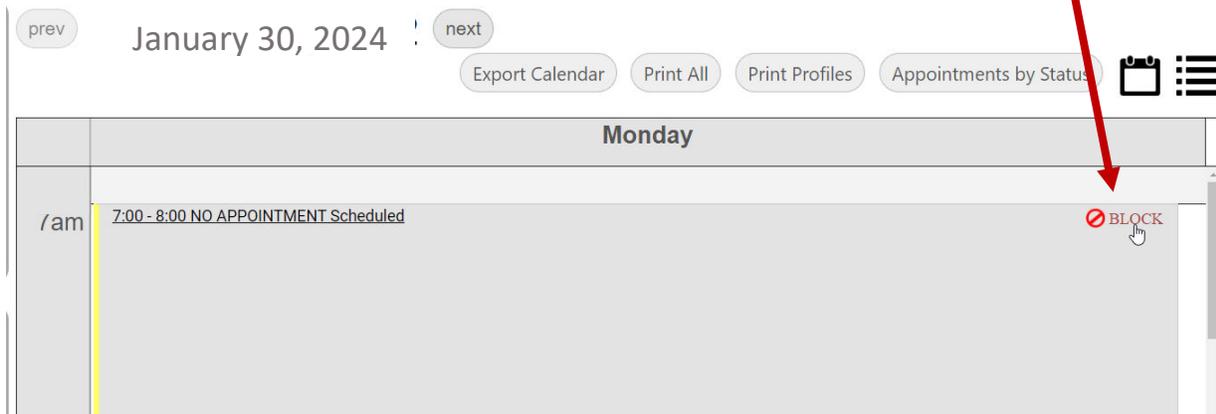
YES NO

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



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



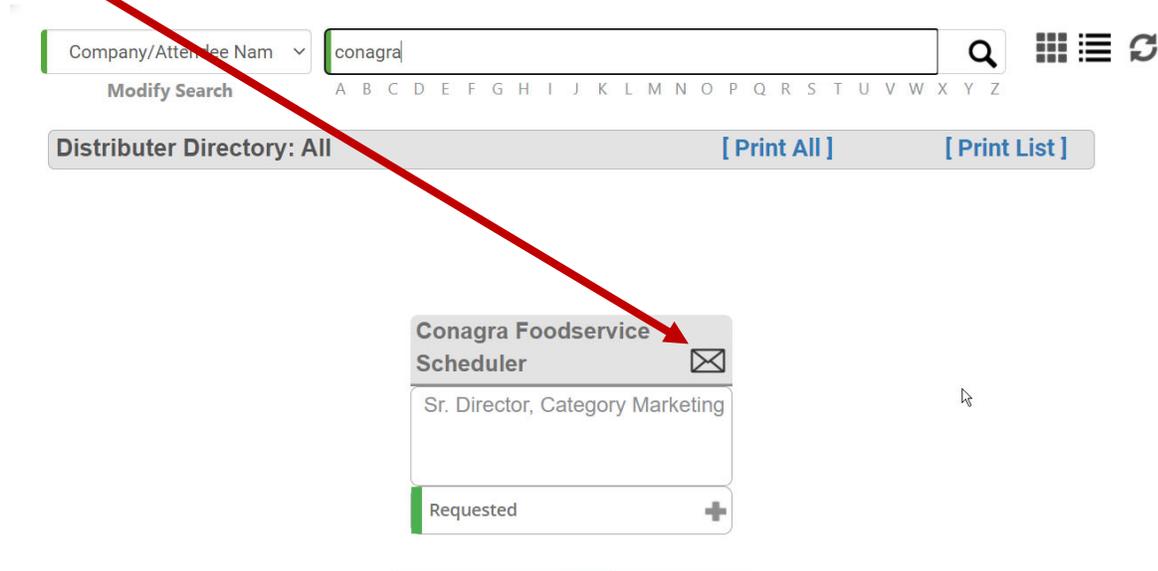
You can provide a title, description and confirm the time slots and click Block – now that time slot will not show in the Request Appointments window

A screenshot of a 'Block Time Slot' dialog box. The dialog has a title bar with 'Block Time Slot' and a close button. It contains several input fields: 'Title' with the text 'NOT AVAILABLE', 'Description' with the placeholder 'Enter Description', 'Date' with the value 'Jan 31, 2022', 'Start Time' with the value '07:00 AM', and 'End Time' with the value '08:00 AM'. At the bottom, there is a blue 'Block' button and a 'Close' button.

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

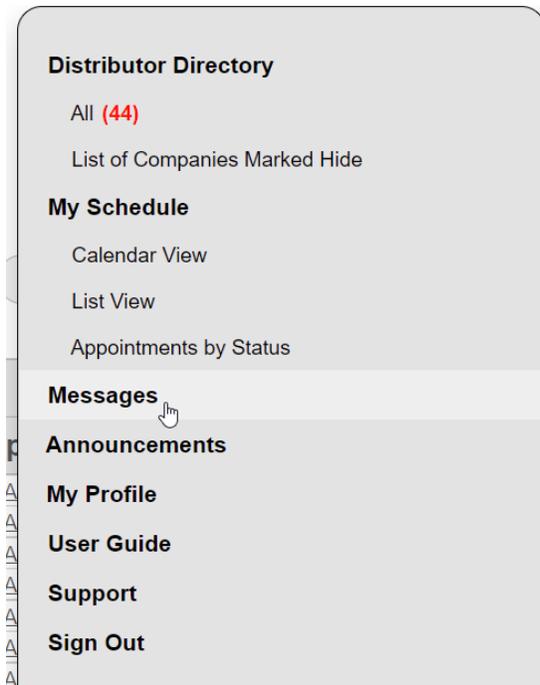
Direct from the profiles, users can click the email icon on the company profile title bar to launch an email



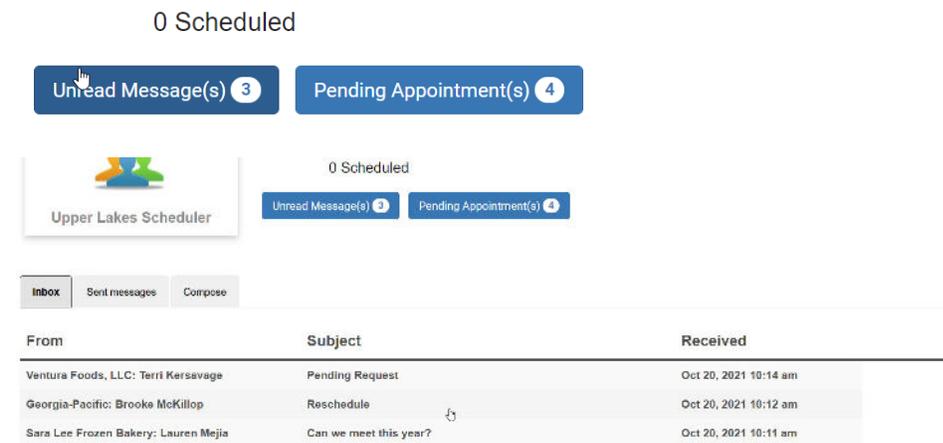
Fill in the Subject, message and add an optional attachment. Click Send when done; we also saw in the previous session the New message notification.

The 'Send Message' dialog box is shown. It has a title bar with a close button. The fields are: 'To: Scheduler', 'From: scheduler@ulfoods.com', and 'Subject: Reschedule - A Better Time'. The message body contains the text 'Would you like to be able to move our meeting to Wednesday'. At the bottom, there are buttons for 'Remove Attachment', 'Add Attachment', and 'Send'. The text 'No file selected.' is visible to the left of the buttons.

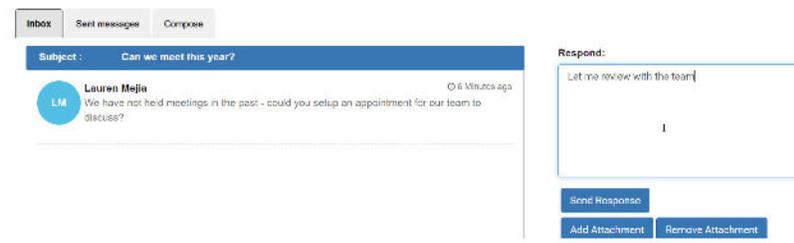
You can also access your mailbox from the Additional Options menu and select Messages



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

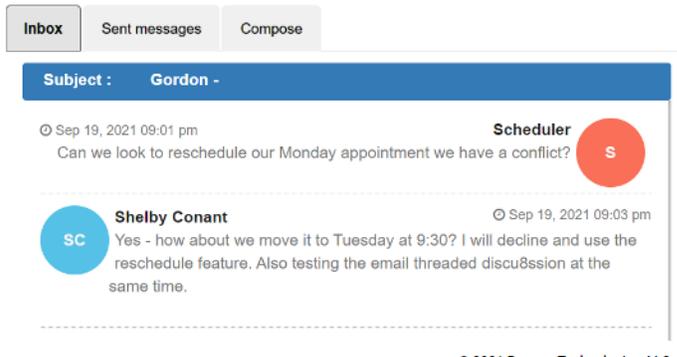


Click on any of the Message to review details and reply



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

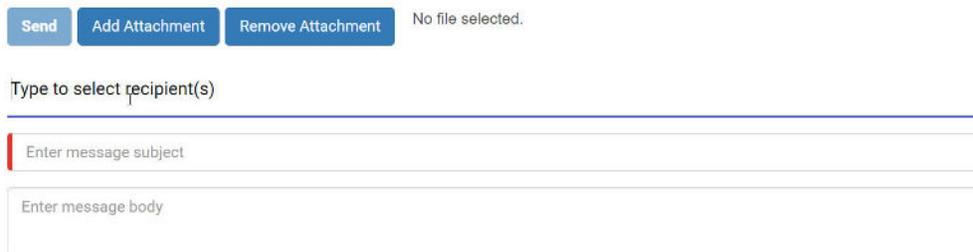
If you click on any of the messages you can see a thread of all the communications



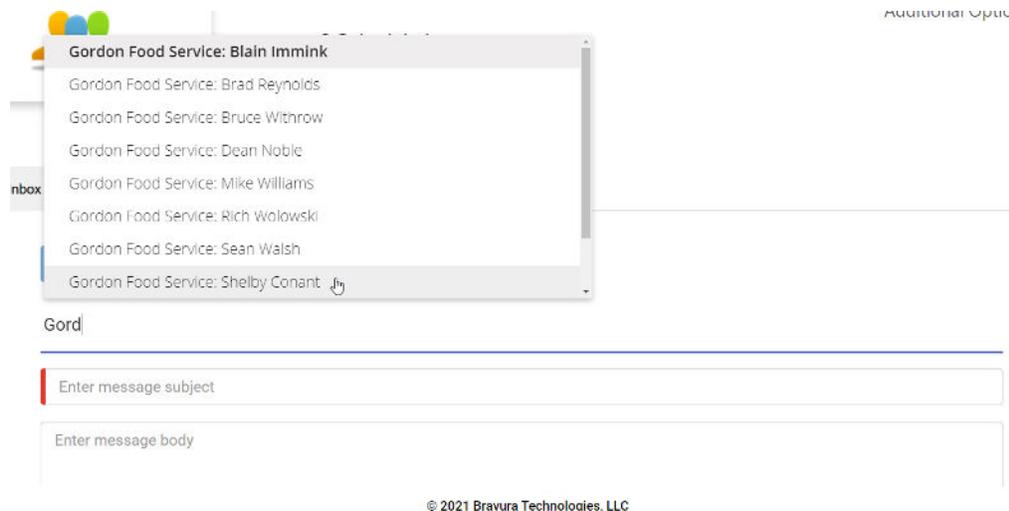
Compose New Message

To compose a new message – click the Compose button

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



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: Shelby Conant ✕

Schedule Status

We have a couple of outstanding requests, can we talk about confirming one of the dates?

I

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

Click Send to send the message.