

# FMI ONLINE APPOINTMENT SCHEDULER

User manual to guide appointment scheduling contacts through the use of the FMI online appointment scheduler.

Last update: October 22, 2013

*User  
Manual*



## FMI Appointment Scheduler User Manual

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# Retailers and Suppliers

## Accessing the Online Appointment Scheduler

Login to the FMI Appointment Scheduler using the URL sent to you by the FMI staff. You will use the username and password that was provided to you in the scheduler letter. If you do not know your password, simply click on the "Forgot Password" link, and it will be e-mailed to you.

## Current Schedule

When you first login to the FMI Appointment Scheduler, you will come to the main schedule viewing page for your company. This page shows each day of the meeting and the time periods in which appointments may be scheduled. Next to each one of these time blocks, you will see the status for that time. These can be:

1. **"OPEN" with a link to "block"** – You have not requested an appointment with a company for this time period, and no companies have requested an appointment with you. For instructions on blocking a time period, see the sections below.
2. **The name of a company with "please respond" linked next to it** – One or more companies have requested an appointment with you during this time period. See the sections below for further instructions on how to respond to requests.
3. **The name of a company with the words "pending response" and a link to cancel** – An appointment request you have made to a company is still pending a response. If you would like to cancel one of your requests, see the sections below.
4. **The name of a company with Reschedule Cancel Appointment links next to it** – You have a confirmed appointment with this company and an option to reschedule or cancel if necessary.
5. **"TIME SLOT BLOCKED" with an "unblock" link next to it** – A time period you have chosen to block from scheduling appointments. See the section below on blocking and unblocking time periods.



- Education
- Calendar
- Conferences & Tradeshows
- Event Archive
- Industry Event Calendar
- Awards

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## Appointment Scheduler

APPOINTMENT SCHEDULE FOR: FOOD MARKETING INSTITUTE

**2014 Strategic Executive Exchange**

Below is your current appointment schedule.

[Click here to request an appointment](#)

[Download Calendar](#)

SATURDAY, JANUARY 11, 2014	
12:00 PM - 12:45 PM	Kellogg Company <a href="#">Reschedule</a> <a href="#">Cancel Appointment</a>
01:00 PM - 01:45 PM	TIME SLOT BLOCKED <a href="#">Unblock</a>
02:00 PM - 02:45 PM	OPEN <a href="#">Block</a>
03:00 PM - 03:45 PM	Time/Warner Retail Sales & Marketing - Pending Response <a href="#">Cancel Request</a> EXPIRING IN 4 DAYS
04:00 PM - 04:45 PM	McCormick & Company, Inc. - <a href="#">Please Respond</a> EXPIRING IN 4 DAYS

- ← Confirmed Appointment
- ← Blocked Time Slot
- ← Open Time Slot
- ← Pending Other Party's Response
- ← Pending Your Response

## Requesting an Appointment

If you would like to request an appointment with a company, click the link at the top of the main schedule page titled "Click here to request an appointment."

Once you have clicked on the link, you will be brought to a page listing all the company's accepting appointments for this meeting. Click on the name of the company with whom you would like to request an appointment.

Once you have clicked on the name of the company, you will see all the time periods available to schedule with this company. Click on the "Request Appointment" link next to the time period you would like to request an appointment.

Once you have selected the time period, you will be brought to a page where you may enter additional notes that you would like included in the appointment request to the company. Enter any notes, and then click on the "Request Appointment" button.

An e-mail notifying the company that you have requested an appointment with them will be sent to the Scheduling Contact, and you will see a page confirming your request. You may click on the link at the bottom of the page to return to the main schedule page to request more appointments, or you can select the link to request an additional appointment with the same company.

If you would like to schedule back-to-back appointments with a company, you must select the option to request an appointment with the same company. Be sure to include a **note** with the requested start and finish time so that the company is aware of the double block.

Once the company responds to your request, you will receive an e-mail, and your main schedule will be updated.

The screenshot displays the 'Appointment Scheduler' interface. At the top, there is a green header with 'EVENTS & EDUCATION' and a background image of a store aisle. Below the header is a navigation menu with options: Education, Calendar, Conferences & Tradeshow, Event Archive, Industry Event Calendar, and Awards. The main content area is titled 'Appointment Scheduler' and includes a breadcrumb trail: HOME | EVENTS & EDUCATION | APPOINTMENT SCHEDULER. There are 'PRINT' and 'SHARETHIS' links. The text below the title reads: 'Below is the appointment availability for Kellogg Company at the 2014 Strategic Executive Exchange. Click on Request Appointment to request an appointment for a specific date and time. The company contact will receive an e-mail with your request.'

SATURDAY, JANUARY 11, 2014	
12:00 PM - 12:45 PM	<a href="#">Request Appointment</a>
01:00 PM - 01:45 PM	<a href="#">Request Appointment</a>
02:00 PM - 02:45 PM	<a href="#">Request Appointment</a>
03:00 PM - 03:45 PM	<a href="#">Request Appointment</a>
04:00 PM - 04:45 PM	<a href="#">Request Appointment</a>

SUNDAY, JANUARY 12, 2014	
08:00 AM - 08:45 AM	<a href="#">Request Appointment</a>
09:00 AM - 09:45 AM	<a href="#">Request Appointment</a>
10:00 AM - 10:45 AM	<a href="#">Request Appointment</a>

## Rescheduling or Canceling a Confirmed Appointment or Appointment Request

If you **requested an appointment** with a company that you no longer wish to pursue, click the “Cancel Request” link next to the pending request. You will go to a page where you may simply cancel the pending request, or cancel and suggest an alternative time. You are also given the opportunity to enter any notes that you would like send along with your cancellation/reschedule.

If you wish to cancel a **confirmed appointment** with a company that you no longer wish to pursue, click the “Cancel Appointment” link next to the confirmed appointment. You will be asked to confirm if you would like to go through with the cancellation. If you say yes, the appointment will be permanently deleted from your schedule. You may also reschedule the appointment by requesting an alternate time slot. Only available time slots for the company will show.

An e-mail will be sent to the scheduling contact telling them that the pending request/confirmed appointment has been cancelled.

EVENTS & EDUCATION

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Education  
Calendar  
Conferences & Tradeshows  
Event Archive  
Industry Event Calendar  
Awards

Appointment Scheduler

APPOINTMENT SCHEDULE FOR: FOOD MARKETING INSTITUTE

2014 Strategic Executive Exchange

Below is your current appointment schedule.

[Click here to request an appointment](#)

[Download Calendar](#)

SATURDAY, JANUARY 11, 2014	
12:00 PM - 12:45 PM	Kellogg Company <a href="#">Reschedule</a> <a href="#">Cancel Appointment</a>
01:00 PM - 01:45 PM	TIME SLOT BLOCKED <a href="#">Unblock</a>
02:00 PM - 02:45 PM	OPEN <a href="#">Block</a>

Reschedule or Cancel an Appointment

## Responding to a Request from the Calendar Page

To respond to an appointment request that has been sent to you by a company, click the “Please Respond” link next to the name of the company to whom you would like to respond.

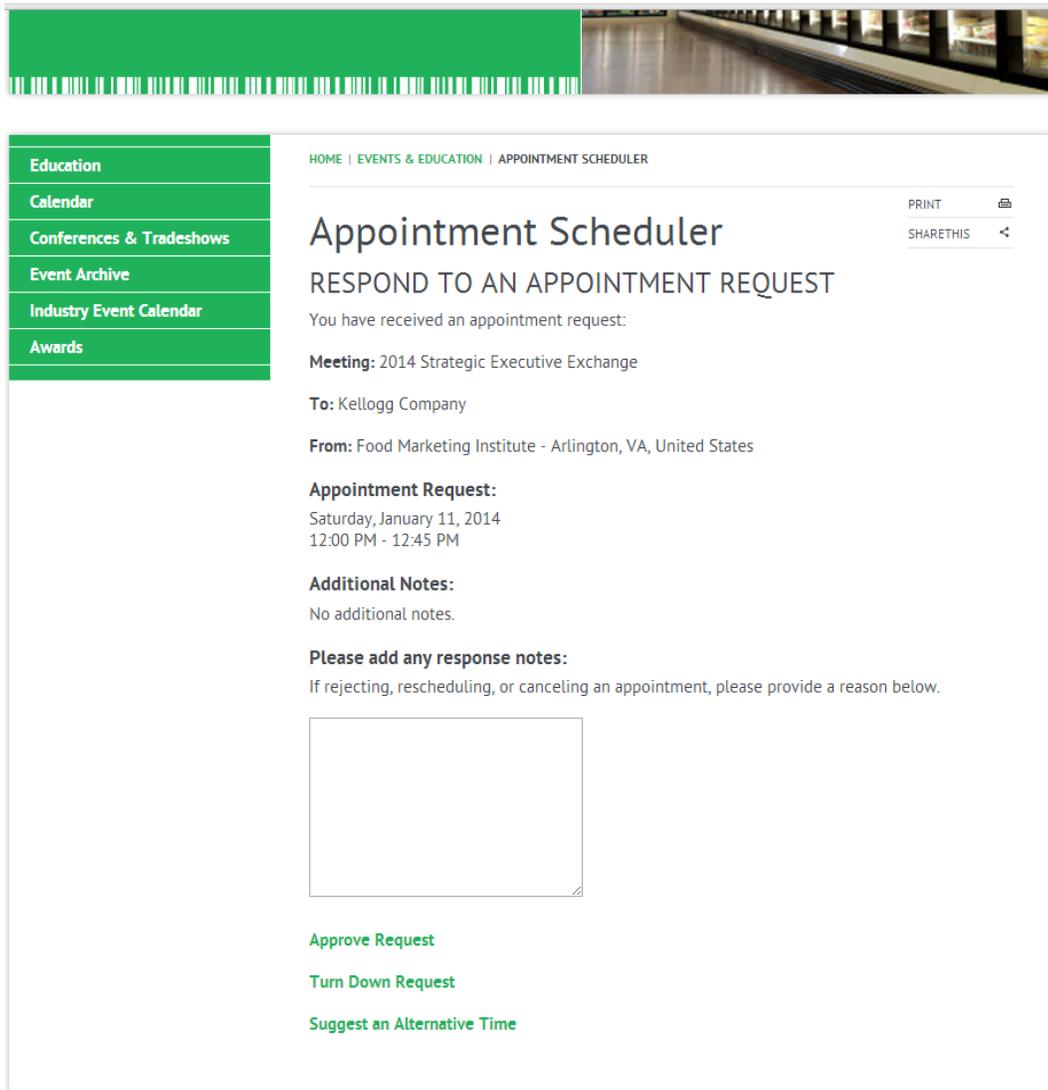
Once you click on the link, you will be taken to a page that will allow you to approve the request, turn down the request or suggest an alternative time. You will also have the option of adding notes to send to the company in your response.

Enter any notes you wish, and then click the appropriate link for accepting, turning down or suggesting an alternative time.

**NOTE:** If you accept an appointment and that time period is no longer available for the company, you will be prompted to suggest an alternative time for an appointment. To do so, click “Suggest an Alternative Time”, then click the link “Request an Appointment with [Company Name]”. The company’s schedule will appear, select an available time slot. A new page will then open with the new time slot, you may choose to leave a note before submitting your alternative time. Complete the process by clicking “Request Appointment”.

Once you have responded to the request, an e-mail will be sent to the Scheduler Contact with your response, along with any notes that you added.

Once you have accepted a request for an appointment from a company, that company's name will now appear in your schedule.



The screenshot displays a web interface for an appointment scheduler. At the top, there is a green navigation bar with a menu containing: Education, Calendar, Conferences & Tradeshows, Event Archive, Industry Event Calendar, and Awards. The main content area has a breadcrumb trail: HOME | EVENTS & EDUCATION | APPOINTMENT SCHEDULER. The page title is "Appointment Scheduler" with sub-headers "RESPOND TO AN APPOINTMENT REQUEST" and "You have received an appointment request:". The request details are as follows: Meeting: 2014 Strategic Executive Exchange; To: Kellogg Company; From: Food Marketing Institute - Arlington, VA, United States; Appointment Request: Saturday, January 11, 2014, 12:00 PM - 12:45 PM; Additional Notes: No additional notes. A section titled "Please add any response notes:" includes the instruction "If rejecting, rescheduling, or canceling an appointment, please provide a reason below." and a large empty text box for input. At the bottom, there are three green buttons: "Approve Request", "Turn Down Request", and "Suggest an Alternative Time". On the right side of the page, there are links for "PRINT" and "SHARETHIS".

## Responding to an E-Mail Request

To respond to an appointment request from an e-mail that has been sent to you by a company, simply **click on the link in the e-mail** message.

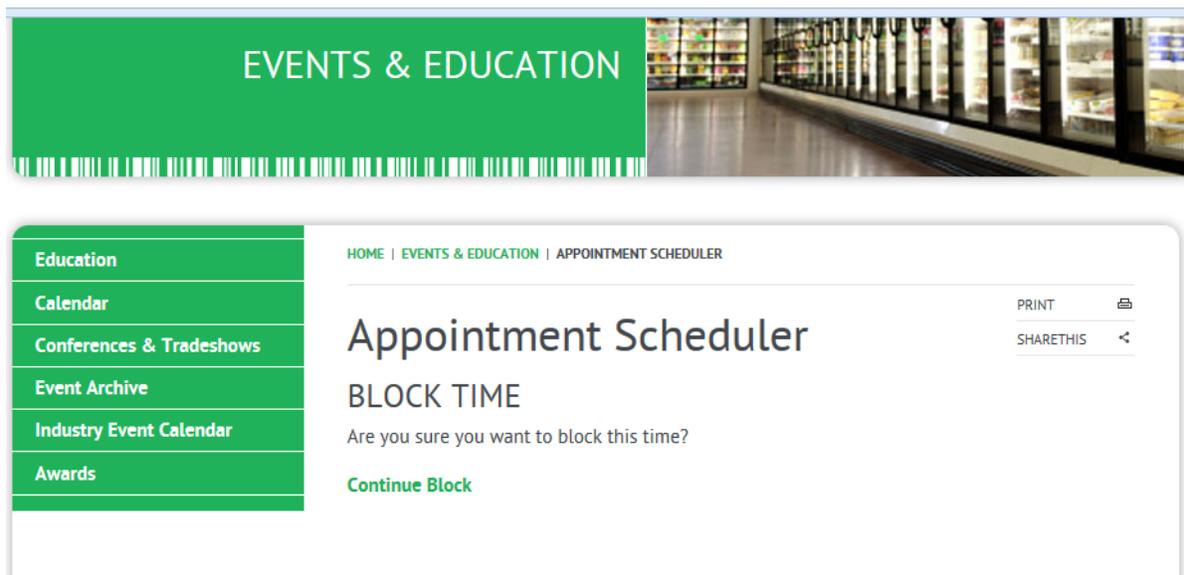
Once you click on the link, you will be taken to a login page where you will enter your username and password. From there, you will be taken to a page where you will be able to accept, turn down or suggest an alternative appointment time.

\*\*\* Do not responding directly to the email as that will not reach the intended recipient. All online scheduling communication must take place within the online scheduler tool by entering the appropriate username and password.\*\*\*

## Blocking and Unblocking a Time Period

If there is a period of time that your company is not available for appointments, you may block this time period. To do this, simply click the “block” link next to any open time period. You will go to a page that asks you to confirm that you really do want to block this time period. Click “Continue”, and this time slot will no longer be available to any partners.

If at any time you change your mind, you may unblock this time period by clicking the “unblock” link next to that time period.



The screenshot displays the 'EVENTS & EDUCATION' section of a website. On the left is a green navigation menu with links for Education, Calendar, Conferences & Tradeshows, Event Archive, Industry Event Calendar, and Awards. The main content area has a breadcrumb trail: HOME | EVENTS & EDUCATION | APPOINTMENT SCHEDULER. The title 'Appointment Scheduler' is prominently displayed, with 'BLOCK TIME' below it. A confirmation message asks, 'Are you sure you want to block this time?'. A green 'Continue Block' button is visible. In the top right corner, there are 'PRINT' and 'SHARETHIS' options.

## Expiration

Due to the competitive nature of these appointments, appointment requests are set to expire if not responded to after a period of time. Currently, requests are set to expire after 10 days if a response is not made. After five days, both the Retailer and the Company will receive reminder e-mails. After 10 days with no response, the pending appointment will be automatically removed from the calendar and e-mail notices will be sent to both the Company and the Retailer indicating this pending request has now expired. Please be sure to respond to requests in a timely manner so the scheduling process can continue to move forward for all parties.