

# APPOINTMENT SCHEDULING GUIDE

2019

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# APPOINTMENT SCHEDULING GUIDE

## CONTENTS

Appointment scheduling guide .....	3
Software requirements.....	3
Getting started .....	3
Appointment schedule tab overview .....	4
Request an appointment .....	7
Open appointments tab.....	9
Requests by me tab.....	9
Requests to me tab .....	10
Inbox messages .....	12
Sent messages .....	13
Settings tab .....	13
No show reporting tab .....	13
Print/Export .....	14

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# Appointment scheduling guide

This guide explains how appointment taking delegates can review their schedule, make changes and schedule new appointments. Appointment taking delegates can access Appointment Scheduling from 11 April 2019 via the [My TRENZ Zone](#).

**Note:** Only appointment taking delegates can make changes to a company's schedule. To see who is the appointment taking delegate for your company go to the My Company Profile section of the My TRENZ Zone and view the list of delegates on the bottom left hand side of the screen.

The TRENZ appointment system no longer operates on a first-in, first-served basis. Instead, appointment taking delegates can view all delegates who have requested to meet with them at a particular time and can choose who they want to meet. If they also want to meet with the other delegates that requested to see them at this time, they can request an alternative time to see them. Key changes include:

- Delegates can make multiple requests for each time slot depending on who is available at that time.
- Delegates can request an appointment with another delegate across multiple timeslots; allowing the other delegate to choose what time works best.
- If an appointment cancellation request is sent or received and has not been accepted or declined by either party within 48 hours, the appointment will be cancelled from both parties schedules and an email notification will be sent alerting the delegate of the cancellation.

If you need further assistance, please email [info@trenz.co.nz](mailto:info@trenz.co.nz).

## Software requirements

Check that your browser supports the appointment scheduling software:

1. If using Internet Explorer (IE), you need IE 8.0 or higher. Mozilla Firefox and Google Chrome browsers are supported.
2. Disable all pop-up blockers.

## Getting started

Begin by logging into the My TRENZ Zone:

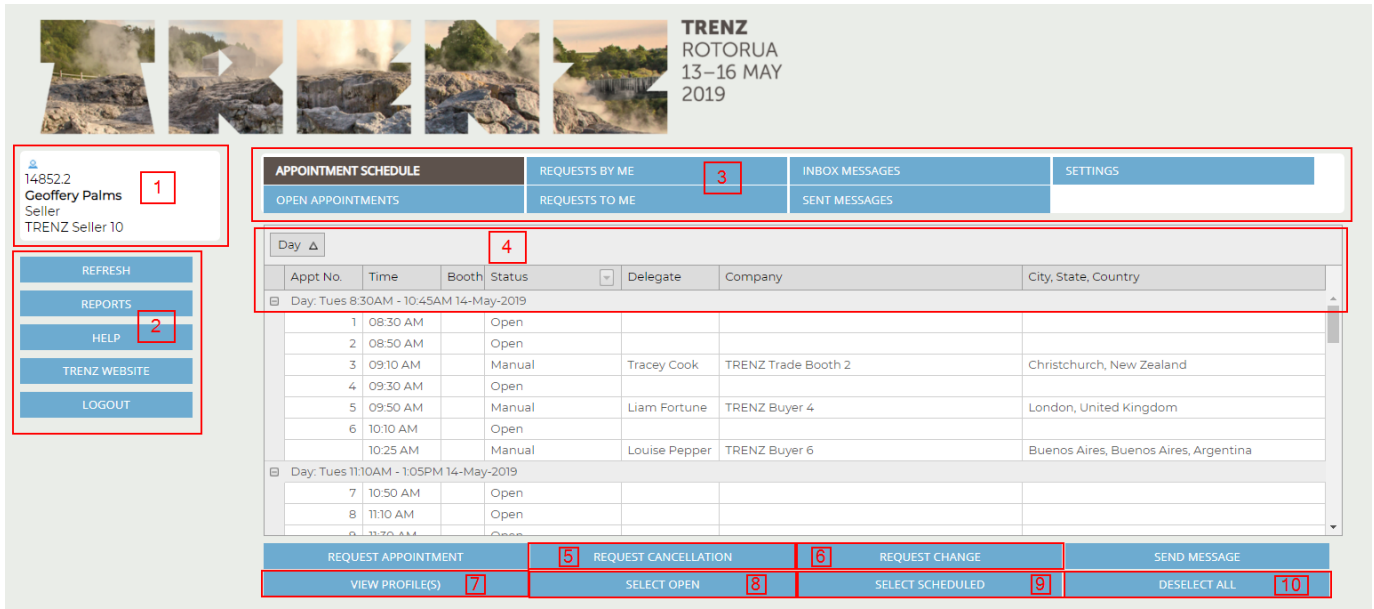
1. Click here to access the [My TRENZ Zone](#).
2. Log in using your personal account information. If you do not know your username and password, check your TRENZ confirmation email or the latest issue of TRENZ Tips – your account information will be on the top right corner.
3. Go to the appointment schedule tab on the side navigation menu.

If at any time you are unsure of what a button or column means, click the 'Help' button at the left of the screen for a quick explanation. Note: If you are inactive in the system for more than 15 minutes, you will need to log in again.

# Appointment schedule tab overview

This is the default page when you enter. This tab shows you your appointment schedule including all pre scheduled appointments as well as open appointment slots.

The screenshot below highlights the key areas of the appointment schedule tab.



The screenshot shows the TRENZ Appointment Schedule interface. The header includes the TRENZ logo and event details: ROTORUA 13-16 MAY 2019. The left sidebar contains user information (14852.2, Geoffrey Palms, Seller, TRENZ Seller 10) and navigation buttons (REFRESH, REPORTS, HELP, TRENZ WEBSITE, LOGOUT). The main area displays the appointment schedule with columns for Appt No., Time, Booth, Status, Delegate, Company, and City, State, Country. The schedule is organized by day, showing two days: Tuesday 8:30AM - 10:45AM and Tuesday 11:10AM - 1:05PM. The bottom navigation bar includes buttons for REQUEST APPOINTMENT, REQUEST CANCELLATION, REQUEST CHANGE, SEND MESSAGE, VIEW PROFILE(S), SELECT OPEN, SELECT SCHEDULED, and DESELECT ALL.

A description of what each number represents follows.

1. View the details on the appointment stream/registered delegate that you are currently logged in under.
2. Access key functions of the system, including a refresh button to load the most up to date information, the ability to print or export your schedule, handy reports to better manage your appointments, and the help function which provides appointment schedule help. You can also link directly to the TRENZ website from here.
3. The navigation bar for the Appointment Scheduling system.
4. Your Appointment Schedule detail for each day – information is set out as follows:

## *Appointment No.*

The appointment slot number of all of the slots available for the duration of TRENZ.

## *Time*

The time the appointment commences.

## *Booth*

The booth number of a Seller or a Trade Booth who you are meeting with.

## *Request Type*

There are three status options:

- Open – Represents available slots.
- Pre scheduled – Appointments that have been pre scheduled following the appointment request process.

- Manual – Appointments made manually through the appointment scheduling process.

*Delegate, Company & City, State, Country*

The name of the person you are meeting with, their company and their location.

5. Request Cancellation: Request a cancellation of a scheduled appointment by selecting the appointment and clicking this button – a cancellation request will be sent to that recipient.

Note: If a cancellation request is sent or received and it has not been accepted or declined by either party within 72 hours, the appointment will be cancelled from both parties schedule and an email notification will be sent alerting you of the cancellation.

6. Request Change: Request a change of a scheduled appointment by selecting the appointment and clicking this button – the system will show you another option of when both parties have the same availability. Select the new appointment time and click 'Select Change'.

You will be notified if there is no common slot for both parties when you select the appointment and click 'Request Change'. Note: You are only able to select one appointment at a time to cancel or change.

7. View Profiles: View the profiles of your scheduled appointments - you can click on one or hold down the 'Ctrl' key on your keyboard and select multiple appointments, then select the 'View Profile(s)' button. You can print all of the profiles or close out by clicking the 'x' symbol at the top of the Profile window.

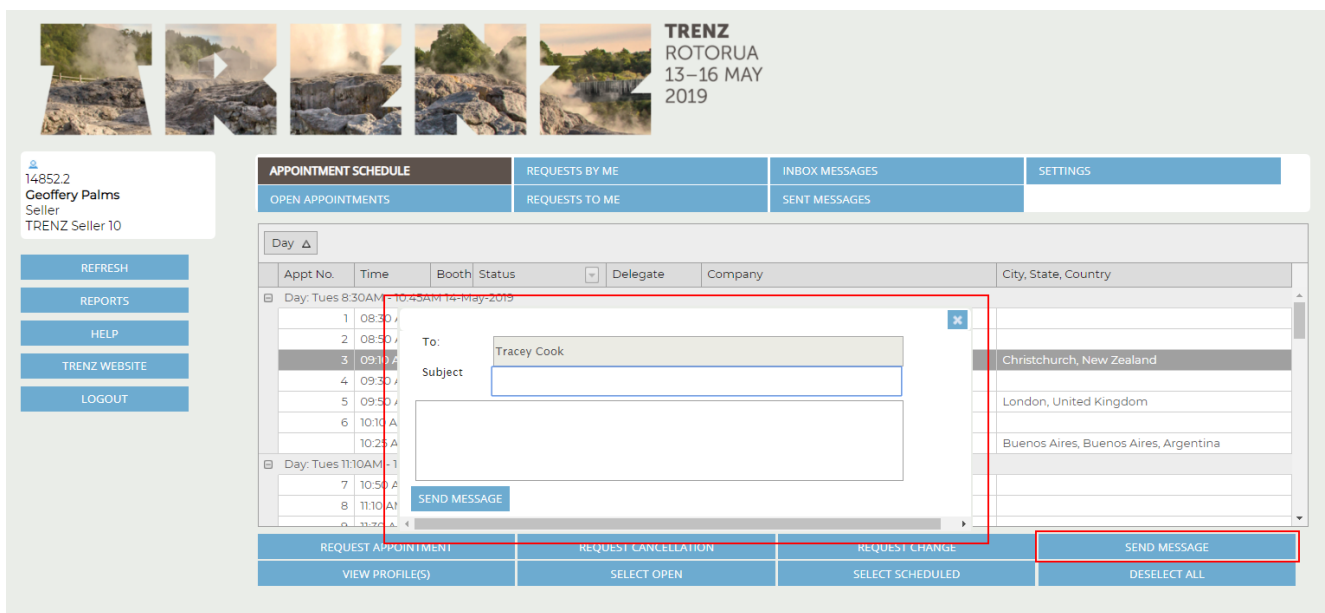
Note: It may take some time for profiles to load if you select a large number of companies.

8. Select Open: Highlight all of your open (available) appointment slots.
9. Select Scheduled: Highlight all of your scheduled appointments.
10. Deselect All: Deselect all highlighted options.

# Send a message to a scheduled appointment

Follow the steps below to send a message to the appointment taking delegate of a company you have scheduled an appointment with:

1. Select the appointment.
2. Click on the 'Send Message' button.
3. A new window will open with the delegate name(s) in the 'To' field. Type your message and select 'Send Message'. If you select more than one delegate to send a message to, each person will be blind copied on that message.



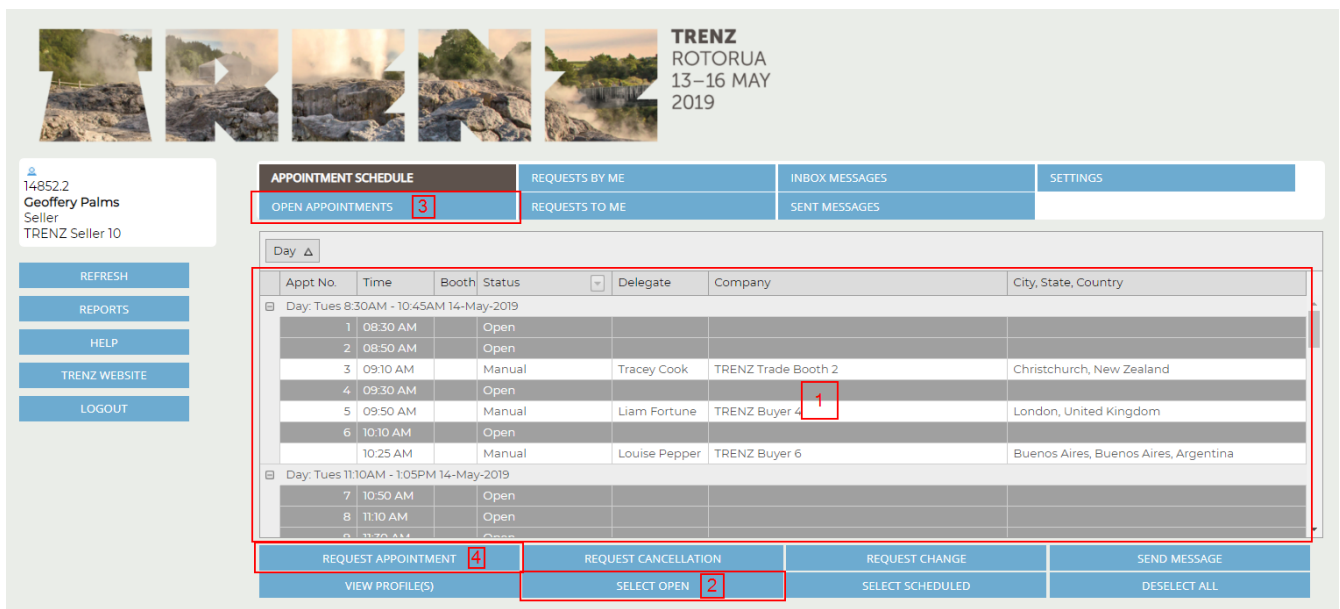
The screenshot displays the TRENZ ROTORUA 13-16 MAY 2019 interface. On the left, a sidebar shows the user profile for Geoffrey Palms (Seller, TRENZ Seller 10) and navigation buttons: REFRESH, REPORTS, HELP, TRENZ WEBSITE, and LOGOUT. The main area features a table of appointments. Appointment 3, scheduled for Tuesday, May 14th at 09:30 AM, is selected. A message window is open for this appointment, showing the 'To' field populated with 'Tracey Cook' and a 'Subject' field. A 'SEND MESSAGE' button is visible in the window. Below the appointment table, a row of buttons includes 'REQUEST APPOINTMENT', 'REQUEST CANCELLATION', 'REQUEST CHANGE', and 'SEND MESSAGE' (highlighted with a red box). The 'SEND MESSAGE' button in the bottom row is also highlighted with a red box.

# Request an appointment

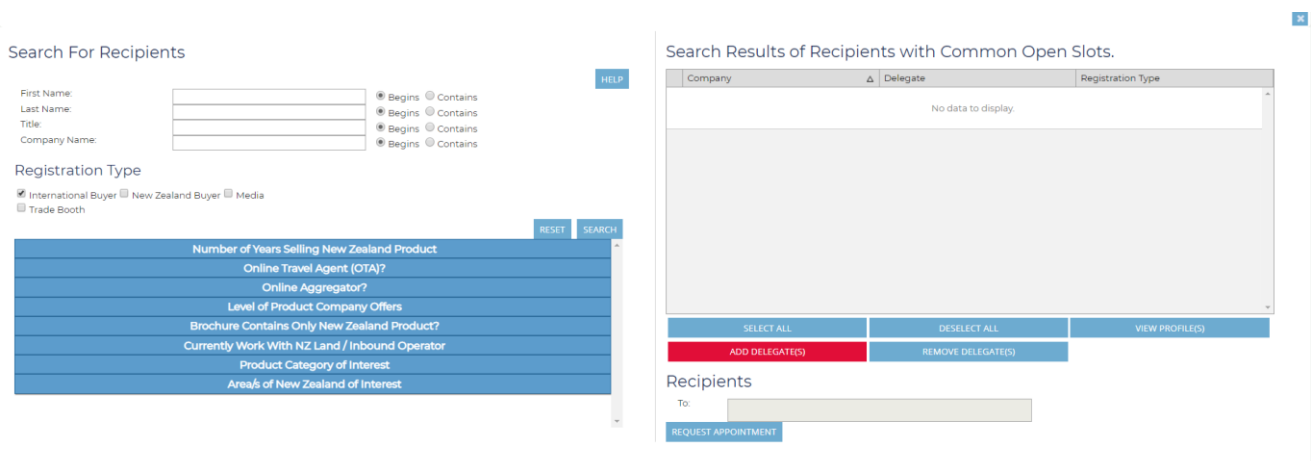
Follow the steps below to request an appointment for any of your open appointment slots.

You're best to request as many mutual slots as are available to maximise chance of confirming a meeting with a delegate

1. Select an open appointment or hold down the 'Ctrl' key on your keyboard and select multiple appointments.
2. You can also click on the 'Select Open' button to highlight all of your open appointment slots.
3. You can also go to the 'Open Appointments' tab and follow the same steps. This tab shows you only your open appointments for easy viewing.
4. Once you have selected the open slot/s click on the 'Request Appointment' button.



5. 'New Appointment' window will open where you can 'Search for Recipients' by performing a quick search for Name, Title, Company Name or First Time.





6. For a more extensive search, click on the Registration Type and any specific profile criteria you are interested in and click 'Search'.

Note: You can only select one Registration Type at a time in order for profile criteria to appear.

7. The results from your search will appear in the 'Search Results of Recipients with Common Open Slots' on the right side of your screen.

Note: you can see those delegates that meet the criteria that you already have an appointment with, those you have requested and those with available slots that match.

### Search For Recipients

First Name:

Last Name:

Title:

Company Name:

Registration Type  
☒ International Buyer ☐ New Zealand Buyer ☐ Media  
☐ Trade Booth

Number of Years Selling New Zealand Product  
☒ Yes ☐ No

Online Travel Agent (OTA)?  
☒ Yes ☐ No

Online Aggregator?  
☐ Yes ☐ No

Level of Product Company Offers  
☐ Yes ☐ No

Brochure Contains Only New Zealand Product?  
☐ Yes ☐ No

Currently Work With NZ Land / Inbound Operator  
☐ Yes ☐ No

Product Category of Interest  
☐ Yes ☐ No

Areas of New Zealand of Interest  
☐ Yes ☐ No

[RESET](#) [SEARCH](#)

### Search Results of Recipients with Common Open Slots.

Company	Delegate	Registration Type
Status: Available		
Esprit d'Aventure	Ariane Arpin-Delorme	International Buyer
TRENZ Buyer 2	Carol Pure	International Buyer
TRENZ Buyer 2	James Queen	International Buyer

[SELECT ALL](#) [DESELECT ALL](#) [VIEW PROFILES](#)

[ADD DELEGATES](#) [REMOVE DELEGATES](#)

Recipients  
To:

[REQUEST APPOINTMENT](#)

You can select one listing, or hold down the 'Ctrl' key on your keyboard and select multiple listings. Select all available listings by clicking on the 'Select All' button.

8. Once selected you can view their profile by clicking the 'View Profile/s' button.

A pop up window will load with their details and available slots.


9. Once selected click on the 'Add Delegates' button to add them to the 'Recipients' field

10. Click on the 'Request appointment' button.



## Open appointments tab

This tab shows you all of your open appointment slots for easy viewing.



**TRENZ**  
 ROTORUA  
 13-16 MAY  
 2019

APPOINTMENT SCHEDULE	REQUESTS BY ME	INBOX MESSAGES	SETTINGS
<b>OPEN APPOINTMENTS</b>	REQUESTS TO ME	SENT MESSAGES	

Appointment Number	Appointment Start Time	Appointment End Time
0	14/05/2019 01:05 PM	14/05/2019 02:45 PM
0	15/05/2019 10:45 AM	15/05/2019 11:10 AM
0	15/05/2019 01:30 PM	15/05/2019 05:30 PM
0	16/05/2019 10:25 AM	16/05/2019 10:50 AM
0	16/05/2019 01:05 PM	16/05/2019 02:45 PM
1	14/05/2019 08:30 AM	14/05/2019 08:45 AM
2	14/05/2019 08:50 AM	14/05/2019 09:05 AM
4	14/05/2019 09:30 AM	14/05/2019 09:45 AM
6	14/05/2019 10:10 AM	14/05/2019 10:25 AM
7	14/05/2019 10:50 AM	14/05/2019 11:05 AM
8	14/05/2019 11:10 AM	14/05/2019 11:25 AM
9	14/05/2019 11:30 AM	14/05/2019 11:45 AM
10	14/05/2019 11:50 AM	14/05/2019 12:05 PM
11	14/05/2019 12:10 PM	14/05/2019 12:25 PM
12	14/05/2019 12:30 PM	14/05/2019 12:45 PM

REQUEST APPOINTMENT
SELECT ALL
DESELECT ALL

14852.2  
 Geoffery Palms  
 Seller  
 TRENZ Seller 10

REFRESH

REPORTS

HELP

TRENZ WEBSITE

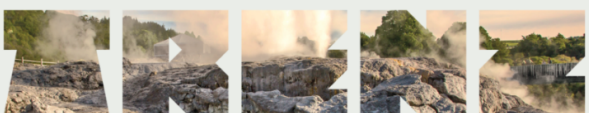
LOGOUT

To request an appointment from this tab, please follow the instructions under the 'Request an Appointment' section of this guide.

## Requests by me tab

This tab shows you all of the requests sent by you including appointment requests, cancellation requests and change requests.

1. All of your 'Pending' requests will appear at the top of the list. Once that request has either been accepted or declined, it will move to the bottom of the list and be marked as either 'Scheduled' or 'Granted' depending on the type of request sent.
2. You have the option to withdraw any request(s) that are still marked 'Pending' by clicking on the 'Action' link in the last column labelled 'Details'. Once the 'Status' changes from Pending, you can no longer withdraw that request.



**TRENZ**  
 ROTORUA  
 13-16 MAY  
 2019

APPOINTMENT SCHEDULE	REQUESTS BY ME	INBOX MESSAGES	SETTINGS
<b>OPEN APPOINTMENTS</b>	REQUESTS TO ME	SENT MESSAGES	

Request Type	Status	Delegate	Company	Time	Registration Type	City, State, Country	Details
Appointment	Pending	Julie Stewart	TRENZ Buyer 5	27/03/2019 10:55 PM	New Zealand Buyer	Auckland, New Zealand	<a href="#">Action</a>
Appointment	Scheduled	John McDonald	TRENZ Trade Booth 1	27/03/2019 10:30 PM	Trade Booth	Christchurch, New Zealand	<a href="#">Action</a>
Appointment	Scheduled	Lucy Wyatt	TRENZ Media 1	27/03/2019 10:31 PM	Media	Auckland, Auckland, New Zealand	<a href="#">Action</a>
Appointment	Unavailable	Tony Xe	TRENZ Buyer 1	27/03/2019 10:55 PM	International Buyer	Beijing, China	<a href="#">Action</a>
Appointment	Scheduled	Louise Pepper	TRENZ Buyer 6	27/03/2019 10:55 PM	International Buyer	Buenos Aires, Buenos Aires, Argentina	<a href="#">Action</a>
Appointment	Scheduled	Jessie Chan	TRENZ Media 2	27/03/2019 10:56 PM	Media	Los Angeles, California, United States	<a href="#">Action</a>
Appointment	Unavailable	Tracey Cook	TRENZ Trade Booth 2	27/03/2019 10:56 PM	Trade Booth	Christchurch, New Zealand	<a href="#">Action</a>

SELECT ALL
DESELECT ALL
VIEW PROFILE(S)
SEND MESSAGE

14852.2  
 Geoffery Palms  
 Seller  
 TRENZ Seller 10

REFRESH

REPORTS

HELP

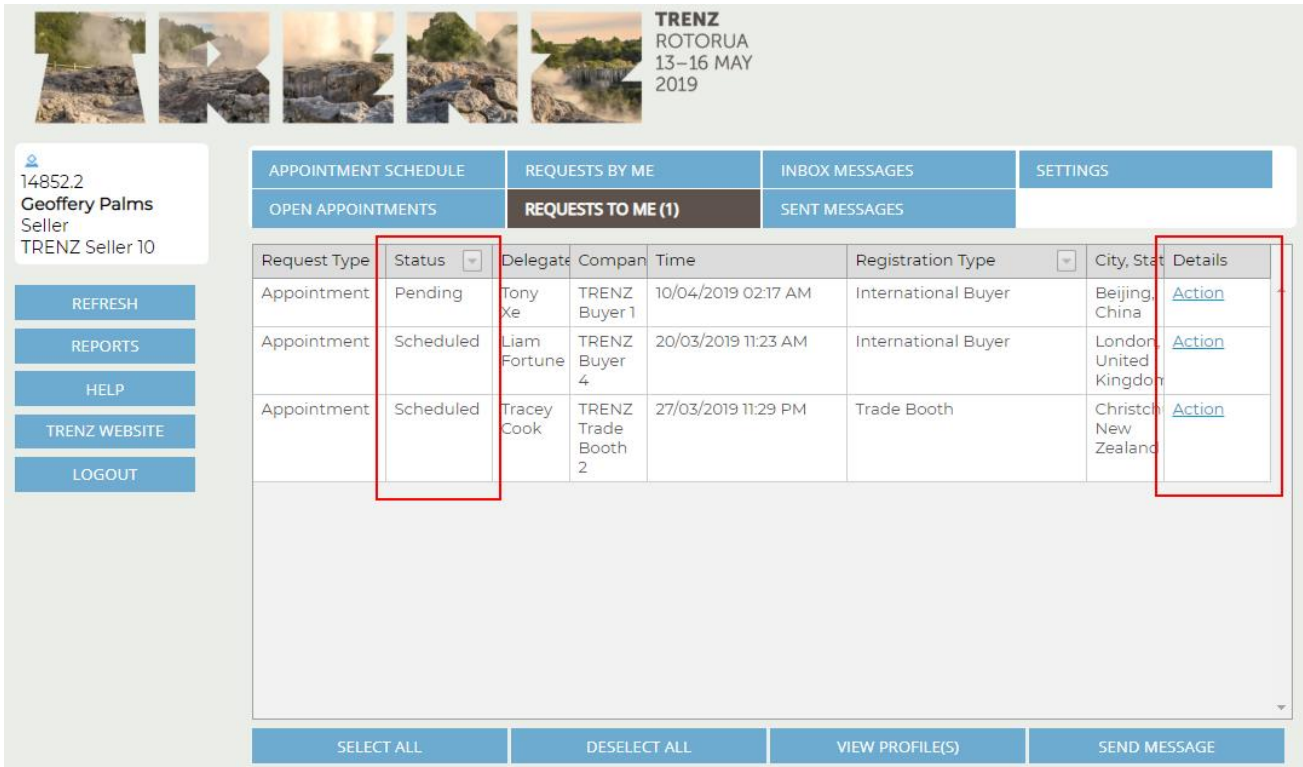
TRENZ WEBSITE

LOGOUT

## Requests to me tab

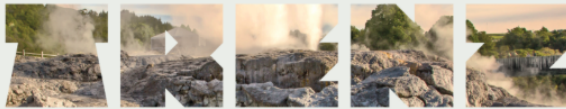
This tab shows you all of the requests sent to you including appointment requests, cancellation requests and change requests.

1. All of your 'Pending' requests will appear at the top of the list. Once that request has either been accepted or declined, it will move to the bottom of the list and be marked as either 'Scheduled' or 'Granted' depending on the type of request sent.

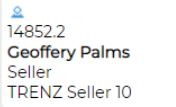


Request Type	Status	Delegate	Company	Time	Registration Type	City, State	Details
Appointment	Pending	Tony Xe	TRENZ Buyer 1	10/04/2019 02:17 AM	International Buyer	Beijing, China	<a href="#">Action</a>
Appointment	Scheduled	Liam Fortune	TRENZ Buyer 4	20/03/2019 11:23 AM	International Buyer	London, United Kingdom	<a href="#">Action</a>
Appointment	Scheduled	Tracey Cook	TRENZ Trade Booth 2	27/03/2019 11:29 PM	Trade Booth	Christchurch, New Zealand	<a href="#">Action</a>

2. You have the option to withdrawal any request(s) that are still marked 'Pending' by clicking on the 'Action' link in the last column labelled 'Details'. Once the 'Status' changes from Pending, you can no longer withdrawal that request.



**TRENZ**  
 ROTORUA  
 13-16 MAY  
 2019



REFRESH  
 REPORTS  
 HELP  
 TRENZ WEBSITE  
 LOGOUT

APPOINTMENT SCHEDULE	REQUESTS BY ME	INBOX MESSAGES	SETTINGS
OPEN APPOINTMENTS	<b>REQUESTS TO ME (1)</b>	SENT MESSAGES	

Request Type	Status	Delegate	Compan	Time	Registration Type	City, State	Details
Appointment	Pending		TRENZ	13/05/2019 08:30 AM	Individual	Beijing, China	<a href="#">Action</a>
Appointment	Pending					London, United Kingdom	<a href="#">Action</a>
Appointment	Pending					Christchurch, New Zealand	<a href="#">Action</a>

Slot	Start Time	Date	Comments
1	08:30 AM	14/05/2019	

ACCEPT

DECLINE

SELECT ALL

DESELECT ALL

VIEW PROFILE(S)

SEND MESSAGE

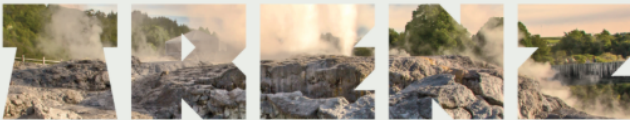
Once you have accepted or declined that request, it will either be added or removed from your appointment schedule, depending on the type of request and the status of that request will change from 'Pending' to 'Scheduled' or 'Granted'.

Status of 'Unavailable' means that the request is no longer available to you because the person that requested you is no longer available to meet at that specific time.

3. You have the option when you decline to write a comment about why you are declining the request.

# Inbox messages

This tab shows you all of the general email messages you have received from within the message centre.



**TRENZ**  
 ROTORUA  
 13-16 MAY  
 2019

14852.2  
**Geoffery Palms**  
 Seller  
 TRENZ Seller 10

REFRESH  
 REPORTS  
 HELP  
 TRENZ WEBSITE  
 LOGOUT

APPOINTMENT SCHEDULE  
 OPEN APPOINTMENTS

REQUESTS BY ME  
 REQUESTS TO ME (1)

**INBOX MESSAGES**  
 SENT MESSAGES

SETTINGS

From	Company	Subject	Date and Time	Status
Lucy Wyatt	TRENZ Media 1	RE: TRENZ 2019	27/03/2019 11:06 PM	Read
Jessie Chan	TRENZ Media 2	RE: 2019	27/03/2019 11:11 PM	Read
Louise Pepper	TRENZ Buyer 6	Request for appointment	27/03/2019 11:16 PM	Read
Tracey Cook	TRENZ Trade Booth 2	TESTTTTT	27/03/2019 11:38 PM	Read

SELECT ALL  
 VIEW PROFILE(S)

DESELECT ALL  
 REPLY


PRINT  
 COMPOSE

DELETE  
 FORWARD

To compose a new message, click on the 'Compose' button and enter your search criteria.

Note: There will not be any appointment requests you've received listed under this tab.

Search for the Recipient using the search tools – all delegates are searchable and can be filtered.



**TRENZ**  
 ROTORUA

14852.2  
**Geoffery Palms**  
 Seller  
 TRENZ

SEARCH  
 RESET

Search For Recipients

First Name:   
 Last Name:   
 Title:   
 Company Name:

Begins Contains  
 Begins Contains  
 Begins Contains

Registration Type  
☐ Seller ☐ Sponsor ☒ International Buyer  
☐ New Zealand Buyer ☐ Media ☐ Trade Booth  
☐ Research

Number of Years Selling New Zealand Product  
 Online Travel Agent (OTA)?  
 Online Aggregator?  
 Level of Product Company Offers  
 Brochure Contains Only New Zealand Product?  
 Currently Work With NZ Land / Inbound Operator  
 Product Category of Interest  
 Areas of New Zealand of Interest

Recipients' Search Results

Company	Delegate	Registration Type
Esprit d'Aventure	Ariane Arpin-Delorme	International Buyer
TRENZ Buyer 1	Tony Xe	International Buyer
TRENZ Buyer 2	Carol Pure	International Buyer
TRENZ Buyer 3	James Queen	International Buyer
TRENZ Buyer 4	Jennifer Lovejoy	International Buyer
TRENZ Buyer 5	Heather Topaz	International Buyer
TRENZ Buyer 6	Liam Fortune	International Buyer
TRENZ Buyer 7	Muthu Dharma	International Buyer

SELECT ALL  
 ADD RECIPIENTS

DESELECT ALL  
 REMOVE DELEGATE(S)

VIEW PROFILE(S)

Write Your Message


To: Carol Pure  
 Subject: TRENZ Appointment  
 Message: Hi there Carol,  
 I'd love to meet with you to discuss our new product. I'd really appreciate it if you accepted my request.  
 Many thanks,  
 Geoffery

SEND

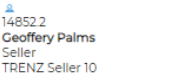
Highlight the person you wish to connect with. Select 'Add Recipients', write your message and press send.

## Sent messages

This tab shows you all of the general email messages you have sent from within the message centre. There will not be any appointment requests you've sent listed under this tab.



**TRENZ**  
 ROTORUA  
 13-16 MAY  
 2019



REFRESH  
 REPORTS  
 HELP  
 TRENZ WEBSITE  
 LOGOUT

APPOINTMENT SCHEDULE		REQUESTS BY ME		INBOX MESSAGES	SETTINGS
OPEN APPOINTMENTS		REQUESTS TO ME (1)		SENT MESSAGES	
Subject	Date and Time	Recipient	Status		
RE: TESTTTTT	27/03/2019 11:38 PM	Tracey Cook (TRENZ Trade Booth 2)	Read		
RE: Request for appointment	27/03/2019 11:17 PM	Louise Pepper (TRENZ Buyer 6)	Read		
2019	27/03/2019 10:58 PM	Jessie Chan (TRENZ Media 2)	Read		
TRENZ 2019	27/03/2019 10:58 PM	Lucy Wyatt (TRENZ Media 1)	Read		

SELECT ALL  
FORWARD

Deselect all  
PRINT  
DELETE

## Settings tab

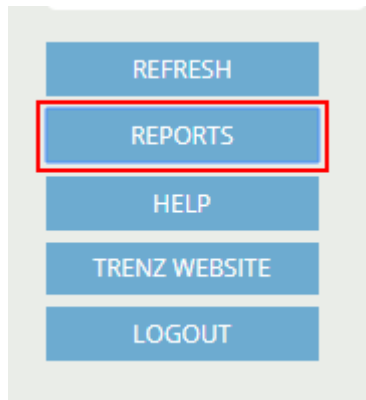
This tab controls your personal settings. The email address you provided when registering will be listed as the default email address and all appointment requests/messages will be emailed to you as well as appear in your 'Requests To Me' tab (appointment requests) or 'Inbox' tab (messages).

## No show reporting tab

This tab allows you to report any 'no show' appointments in real time. This feature will only be available beginning on the first day of appointments.

## Print/Export

Print or export your appointment schedule using the 'Reports' button. You will also find other handy reports here to help you manage your appointment schedule.



Below is a list of the features available:

**Summary** - Print a list of your scheduled appointments showing day/date, appointment slot, time, booth number (applicable only on buyer schedules), request type (Pre Scheduled, Manual, Mutual, Open, etc), delegate name (applicable only on supplier schedules), and company.

Print



**TRENZ 2019**  
Geoffery Palms ( 14852.2 ), Seller  
TRENZ Seller 10  
Wellington, New Zealand

Day <span>▲</span>							
Appt No.	Time	Booth	Appt. Type	Status	Delegate	Registration Type	Company
Day: Tues 8:30AM - 10:45AM 14-May-2019							
1	08:30 AM			Open			
2	08:50 AM			Open			
3	09:10 AM		Manual	Manual	Tracey Cook	Trade Booth	TRENZ Trade Booth 2
4	09:30 AM			Open			
5	09:50 AM		Manual	Manual	Liam Fortune	International Buyer	TRENZ Buyer 4
6	10:10 AM			Open			
	10:25 AM		Manual	Manual	Louise Pepper	International Buyer	TRENZ Buyer 6
Day: Tues 11:10AM - 1:05PM 14-May-2019							
7	10:50 AM			Open			
8	11:10 AM			Open			
9	11:30 AM			Open			
10	11:50 AM			Open			
11	12:10 PM			Open			
12	12:30 PM			Open			
13	12:50 PM			Open			
	01:05 PM			Open			
Day: Tues 2:45PM - 4:40PM 14-May-2019							
14	02:45 PM			Open			
15	03:05 PM			Open			
16	03:25 PM		Manual	Manual	Lucy Wyatt	Media	TRENZ Media 1
17	03:45 PM			Open			
18	04:05 PM		Manual	Manual	John McDonald	Trade Booth	TRENZ Trade Booth 1
19	04:25 PM		Manual	Manual	Jessie Chan	Media	TRENZ Media 2
Day: Wed 8:30AM - 10:45AM 15-May-2019							





Print



**TRENZ 2019**  
Geoffery Palms (14852.2), Seller  
TRENZ Seller 10  
Wellington, New Zealand

Day ▾							
Appt No.	Time	Booth	Appt. Type	Status	Delegate	Registration Type	Company
Day: Tues 8:30AM - 10:45AM 14-May-2019							
3	09:10 AM		Manual	Manual	Tracey Cook	Trade Booth	TRENZ Trade Booth 2
5	09:50 AM		Manual	Manual	Liam Fortune	International Buyer	TRENZ Buyer 4
0	10:25 AM		Manual	Manual	Louise Pepper	International Buyer	TRENZ Buyer 6
Day: Tues 2:45PM - 4:40PM 14-May-2019							
16	03:25 PM		Manual	Manual	Lucy Wyatt	Media	TRENZ Media 1
18	04:05 PM		Manual	Manual	John McDonald	Trade Booth	TRENZ Trade Booth 1
19	04:25 PM		Manual	Manual	Jessie Chan	Media	TRENZ Media 2

**Requests made but not scheduled** - Print a list of appointment requests you submitted that were not scheduled (shows priority and company name).

**Requests received but not scheduled** - Print a list of appointment requests you received that were not scheduled (shows priority and company name).

**Excel Export** - Display your appointment schedule as an Excel spreadsheet.

**PDF Export** - Display your appointment schedule as a PDF file.

**Word Export** - Display your appointment schedule as a Word document.