On the Online Directory, appointment taking/sharing delegates are able to send messages to one another, request new appointments, cancel appointments, block appointment times, view company profiles of registered companies and print their appointment schedule.

You must log in to the Online Directory (accessible at www.chtamarketplace.com via the Make Appointment Request button on the home page) with your personalized Delegate ID and Password.

View Appointment Schedules and Company Profiles

1. On the *Appointment Schedule* tab, click to see your confirmed appointment schedule. To see the profile of the delegate you are meeting with, click on a scheduled appointment and then click the *View Profile* button.

Schedule New Appointments

Requests for new appointments are **NOT** automatically scheduled – they require the approval of the requested delegate.

1. On the *Appointments Schedule* tab, click on an open appointment time.
2. Click the *Request Appointment* button.
3. On the *New Appointment Search*, enter the search criteria. In addition to simple searches using company name or person name, you may also search by marketing profile questions by clicking the Registration Type, then clicking any of the marketing questions displayed in the Search option (keep in mind that not all companies have submitted marketing questions and the search may return limited to no results). *Note: Selecting only the registration type without selecting any marketing questions will return ALL registered appointment taking delegate of that type.*
4. Click the *Search* button.
5. A list of search results will be returned on the right side of the screen. Click a company/delegate name in the Search Results, then click the *Add Delegate(s)* button. Then click the *Request Appointment* button.
6. A request for a new appointment will be sent to the corresponding delegate's *Requests To Me* tab where they can accept or decline the request. The system will also generate an email message that will go to that delegate's email address on record.
7. You should check your *Requests By Me* tab periodically to find out if any of your requests were accepted and scheduled or if they were declined.

Accept/Decline New Appointment Requests to You

1. Requests for new appointments require the consent of the requested company before they will be scheduled.
2. When a request for a new appointment is sent, it will appear in the *Requests To Me* tab. The system will also generate an email message that will go to that delegate's email address on record.
3. To accept or decline the request for a new appointment, click the *Action* button beside the request.
4. Click the request and click either *Accept* or *Decline*.
5. A message will be sent to the requestor informing them or your acceptance or rejection.

Cancel Appointments

Participants may request to cancel, but those requests must be approved by the corresponding delegate.

1. On the *Appointments Schedule* tab, click on the scheduled appointment then click the *Cancel Appointment* button.
2. A request to cancel the appointment will be sent to the delegate's *Requests To Me* tab where they can approve or decline the cancellation request. A message will be sent informing the delegate who requested the cancellation of the cancellation approval or rejection.

Change Appointments

To change a scheduled appointment, select the applicable appointment and click the "**Request Change**" button. From there, select the applicable appointment slot you'd like to change the appointment to and click Request Change.

Send Messages

*All messages are routed directly to the platform, t**o receive a copy of any message in your business email, please go to Settings on the top and add your business email address.***

1. To send messages to someone you are already scheduled to meet with: From the *Appointments Schedule* tab, click on the delegate name. Then, click the *Send Message* button. Next, enter Subject and message body. Finally, click the *Send Message* button.
2. To send messages to someone you are not scheduled to meet with: From *Inbox* tab, click the *Compose* button. Next, on the *Search for Recipients* window, search for one or more delegates you would like to send messages to and add them to the Recipient List by clicking their name(s) and clicking the *Add Recipients* button. Finally, type your message then click the *Send* button.

Print Schedule

Click the Reports button and select one of the print options:

1. Summary: Prints a condensed version of your schedule.
2. Detail: Prints a multi-page detailed schedule with space for notes beside each appointment.
3. Excel Export: Exports your schedule to Microsoft Excel.
4. Word Export: Exports your schedule including every company's profile to Microsoft Word.
5. PDF Export: Exports your schedule to PDF.

Important – you control any changes (additions, cancellations and time changes) that you do in your schedule, therefore you must refer to your schedule online at all times.