

## SCHEDULING APPOINTMENTS WITH FUNDINGSOURCE EXHIBITORS:

- 1.) Go to <https://scheduler.elfaonline.org>
- 2.) Click on the name of the most current meeting.

### Select a Meeting

Meeting Name	Dates	Status
32nd Annual National Funding Conference	April 21, 2020 - April 23, 2020	SCHEDULING OPEN

- 3.) Click on **Meet with an Exhibitor** on the left or the blue, **Request to Meet** button next to the date above your schedule:

View My Schedule(s)  
**Meet With An Exhibitor**

PROFILE INFORMATION ^  
Edit My Attendee Profile

**Attendee**

### Appointment Times



Share Schedule ?

LEGEND  
● Appointment not in meeting hall   ← Awaiting your response   ⌘ Request waiting for approval

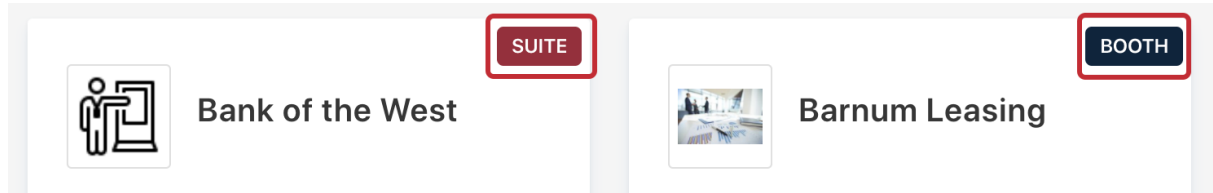
Wednesday, April 22nd, 2020 **+ Request to Meet**

Time Slot	Scheduled Appointments	Invite Status
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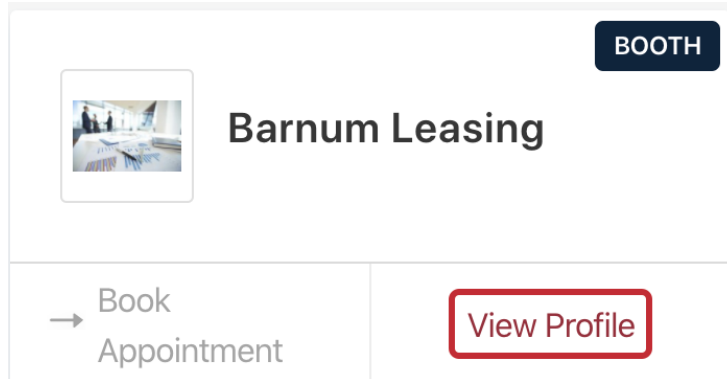
- 4.) This brings up a list of available exhibitors. You can scroll through the list or type in the name of the company you're looking for in the search box above the list:

 <b>Bank of the West</b> SUIITE	 <b>Barnum Leasing</b> BOOTH
<a href="#">→ Book Appointment</a> <a href="#">View Profile</a>	<a href="#">→ Book Appointment</a> <a href="#">View Profile</a>

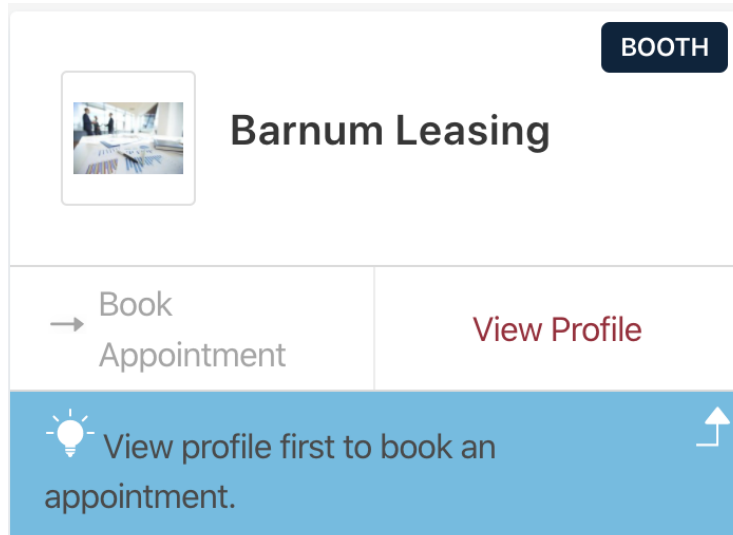
Please note that the icons in the upper right corner of each listing indicate the type of exhibitor. Suites have a red icon and booths have a dark blue icon:



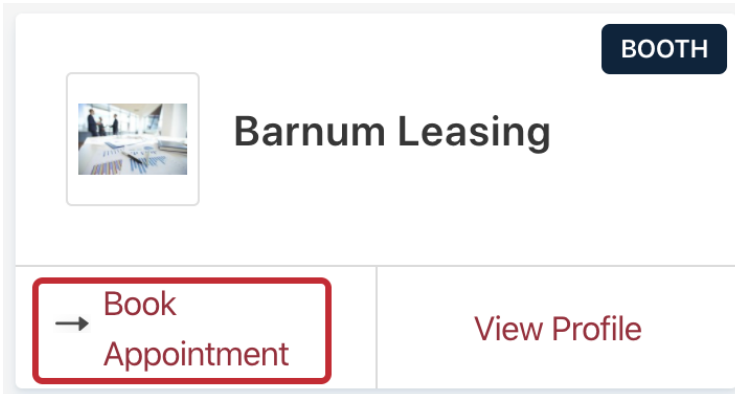
5.) Before you can schedule an appointment with an exhibitor, you must first view their profile to ensure they're a good match. The Book Appointment link will be greyed out until you click on **View Profile** to bring up the company's profile.



If you click on **Book Appointment** before you've looked at the profile, you'll be prompted to view the profile first.

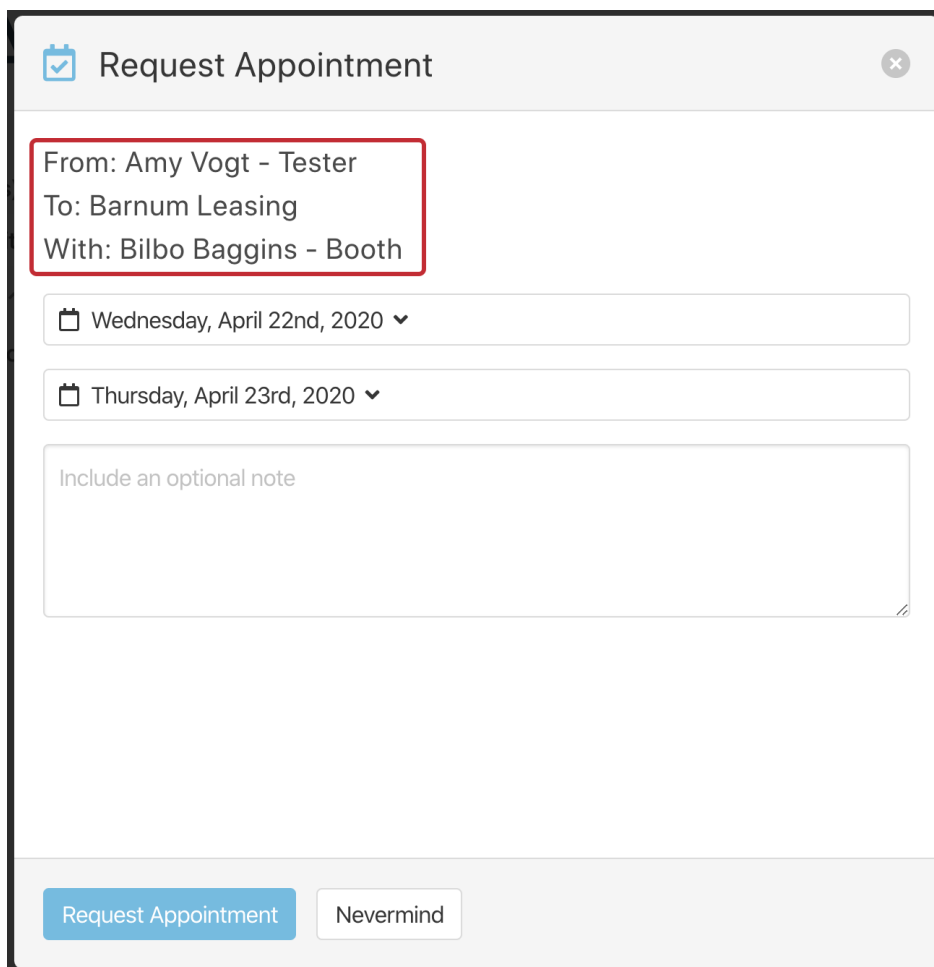


- 6.) Once you've viewed the company's profile, the **Book Appointment** link becomes active. Click the **Book Appointment** link to schedule an appointment with that company.



The screenshot shows a company profile for "Barnum Leasing". At the top right, there is a dark blue button labeled "BOOTH". Below the company name is a small image of a booth. At the bottom, there are two buttons: "Book Appointment" (highlighted with a red border and a red arrow) and "View Profile".

- 7.) A Request Appointment window will pop up that shows who is making the appointment (you or the person you're logged in as), the name of the company you're making an appointment with, and the name of the person at the company who's manning the booth or suite.



The screenshot shows a "Request Appointment" window. At the top, there is a title bar with a calendar icon, the text "Request Appointment", and a close button (X). Below the title bar, there is a red-bordered box containing the following text:

From: Amy Vogt - Tester  
To: Barnum Leasing  
With: Bilbo Baggins - Booth



Below this box, there are two date selection fields:

Wednesday, April 22nd, 2020 ▼  
Thursday, April 23rd, 2020 ▼



Below the date fields, there is a text area with the placeholder text "Include an optional note".

At the bottom of the window, there are two buttons: "Request Appointment" (blue) and "Nevermind" (white).



- 8.) To schedule an appointment, click on either of the days and choose from the list of time slots. Only available time slots will show up here. There is also an option to add a note for the person you'll be meeting with.

 **Request Appointment** 

From: Amy Vogt - Tester  
To: Barnum Leasing  
With: Bilbo Baggins - Booth

 Wednesday, April 22nd, 2020 

08:50 am - 09:10 am  
 09:10 am - 09:30 am  
 09:50 am - 10:10 am

 Thursday, April 23rd, 2020 

Include an optional note

Click on the blue, **Request Appointment** button to schedule the appointment or **Nevermind** to cancel your request.

When the request has been made, you'll see a new pop-up indicating that your appointment request has been sent. Click **OK** to return to the list of exhibitors.

