



Instamatch Tutorial

The Tianguis Instamatch system allows delegates 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.

Login to the Tianguis Instamatch System with your personalized Delegate ID and Password.

View Company Profiles

1. On the **Appointment Schedule** tab, click on a scheduled appointment and then click the **View Profile** button.

Schedule New Appointments (Buyers)

Buyer requests for new appointments are automatically scheduled if the requested company has the appointment time available. Buyer requests for new appointments do not require the consent of the corresponding delegate.

1. On the **Appointments Schedule** tab, click on an open appointment time.
2. Click the **Make 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 Exhibitor, then clicking any of the marketing questions displayed in the search options. *Note: Selecting only the registration type of Exhibitor without selecting any marketing questions will return ALL registered appointment taking Exhibitors.*
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. Click the **Make Appointment** button.
6. The new appointment will automatically be scheduled and a message will be sent to the corresponding Exhibitor's Instamatch **Inbox** informing them of the new appointment.

Schedule New Appointments (Exhibitors, Media Participant)

Exhibitor/Media Participant 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 Exhibitor or Buyer, then clicking any of the marketing questions displayed in the Search option. *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.
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. For this event some requests for new appointments require the consent of the requested company before they will be scheduled:
 - Exhibitor requests made to Buyers
 - Exhibitor requests made to Media Participants
 - Media Participant requests made to Exhibitors
2. When a request for a new appointment is sent, it will appear in the **Requests To Me** tab.
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 of your acceptance or rejection.

Cancel Appointments

For this event, Buyers may automatically cancel appointments without the consent of the corresponding delegate. Exhibitors may not cancel appointments in the Instamatch system and Media 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. For Buyers the appointment will automatically be cancelled and removed from both schedules. A message will be sent to the Exhibitor's Instamatch **Inbox** informing them of the cancellation.
3. For Media Participants, a request to cancel the appointment will be sent to the Exhibitor's **Requests To Me** tab where the Exhibitor 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.

Send Messages

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.



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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.