

HOW TO GET THE MOST OUT OF PARTNERLINX® AND YOUR ONE-ON-ONE BUSINESS APPOINTMENTS:

CREATING A TABLE/TEAM – JANUARY 30 TO MARCH 31, 2023

- **DISTRIBUTORS:** Create tables with topics specific to your business unit.
 - HDA suggests distributor members host at least three tables.
 - Be clear about the table captain and the table attendees because manufacturers often know your people better than your topics. If you have three brand tables, they'll be looking for the person who is their usual contact.
 - Use the "Description" function to clarify the discussions you want to have at each table. Will "Brand Table 1" also be talking about specialty products? Make sure to add specifics if you can.
 - **We encourage you to identify at least one table that is open to "New Business Opportunities," so new manufacturers can easily identify and request appointments with the correct table.**
- **MANUFACTURERS:**
 - PartnerLinx® creates your team and assigns the team members after the conference registration is processed. Manufacturer meeting coordinators can login and review your team information in PartnerLinx® and reassign the team captain if needed or add a team description.

SELECTING APPOINTMENT REQUESTS – APRIL 3 TO MAY 5, 2023

- **DISTRIBUTORS:** Please be aware that some of the manufacturers will have multiple teams. Make sure to note the team captain for the teams before making your selection.
- **MANUFACTURERS:** Do your research!
 - Distributors are working to be clear about the discussion topics they want to address at each table, as well as the people that will man each table. Try to request appointments with the tables and contacts where you'll have the most productive discussions.
- **DISTRIBUTORS AND MANUFACTURERS:** You may make an unlimited number of appointment requests, but HDA suggests to limit the number to no more than 55.

RANKING APPOINTMENT REQUESTS

- **RANKING:** Be sure to prioritize your appointment requests to increase the likelihood that your most important requests will be scheduled.
- **HIDE:** You now have the option to hide a team or table from the list. Hiding the team or table means you will not see them in the list of teams or tables when you are working on your selections.
- **EXCLUDE:** You are able to **exclude** a team or table when entering your selections. Excluding the team or table means an appointment will **not** be created by PartnerLinx. You may exclude up to 20 teams/tables. Please refer to the PartnerLinx® User Guide for detailed instructions.

CALENDAR – DISTRIBUTORS AND MANUFACTURERS

- The calendar is identical to all other participants' calendars. All of the breaks are the same and the timeslot for each appointment is 20 minutes (with five minutes in between appointments). **Each table/team can block up to five timeslots in addition to the scheduled breaks**
- If you need to block more than three timeslots, call HDA and ask to block the timeslots for you.

REPORTS

- You have the option to export the list of distributors, manufacturers or service providers.
 - After logging in, click on Edit Team/Table or Request Appointments and then click on Additional Options found on the top right of the page. If logged in as a **distributor**, you will see all Manufacturers or all Service Providers listed as an option. If logged in as a **manufacturer**, you will see all Distributors or all Service Providers listed as an option. Click on either one to see the lists. If logged in as a **service provider**, you will see all Distributors or all Manufacturers. Select one to see the list and then select Export All or Print All.

FINAL SCHEDULES WILL BE MADE AVAILABLE THE WEEK OF MAY 15, 2023

QUESTIONS? Email or call HDA staff for further assistance

Lisa Gallagher,
Senior Director
Member Services
(202) 964-4818

Michelle Leslie,
Manager
Membership and Education
(202) 964-6547