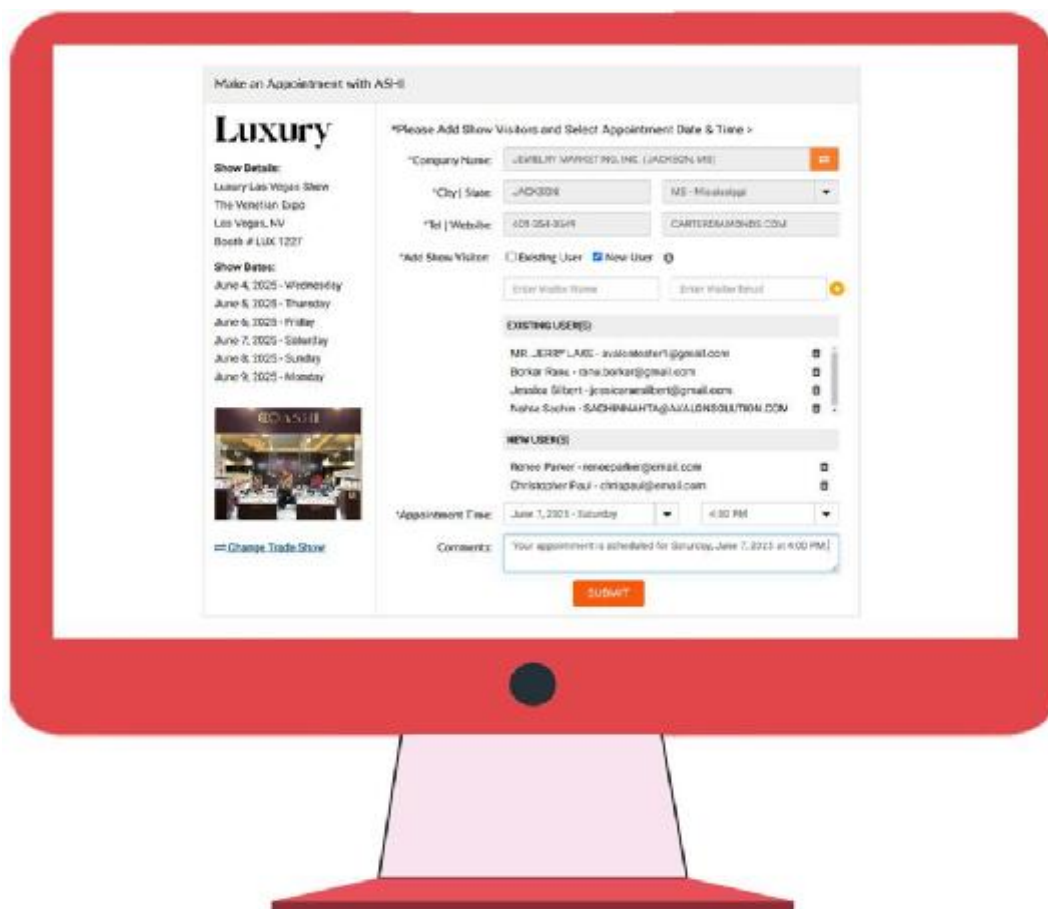


# ASHI

## ASHI B2B SALESMAN PORTAL

### MAKE AN APPOINTMENT MODULE



## HELP MANUAL FOR ASHI SALES TEAM

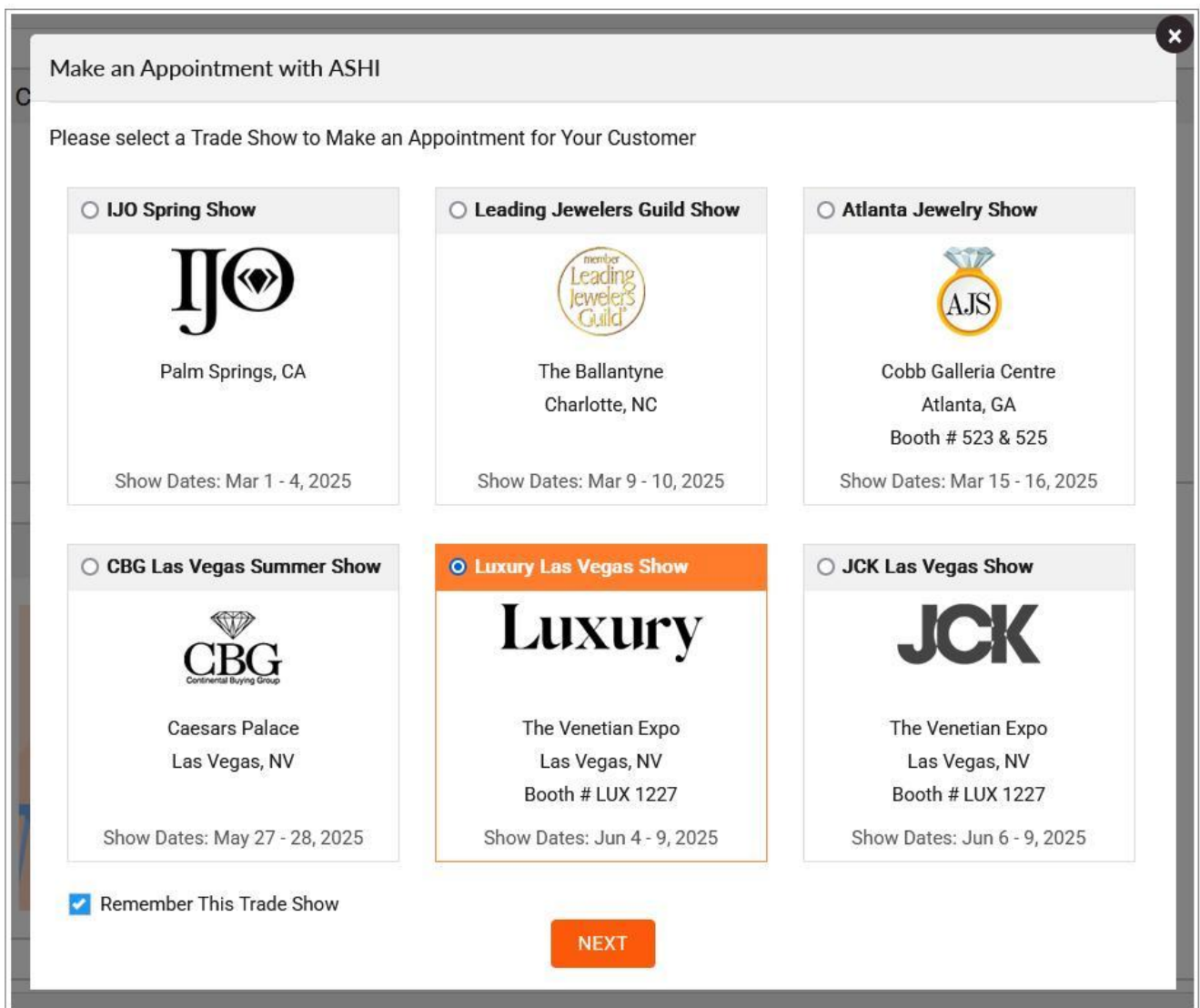
Powered by:



The enhanced "Make an Appointment" module on the ASHI B2B Salesman Portal allows you to efficiently schedule show appointments for both existing customers and prospective customers.

With this module, you can:

- Schedule show appointments for multiple users or visitors in one go.
- Send appointment details to new customers who are not yet ASHI customers.
- Save time and effort while managing appointments for your customers.



## Login to the Salesman Portal

To make a new appointment, log in to the ASHI B2B Salesman Portal using the link below:

<https://www.ashidiamonds.com/Salesmen>

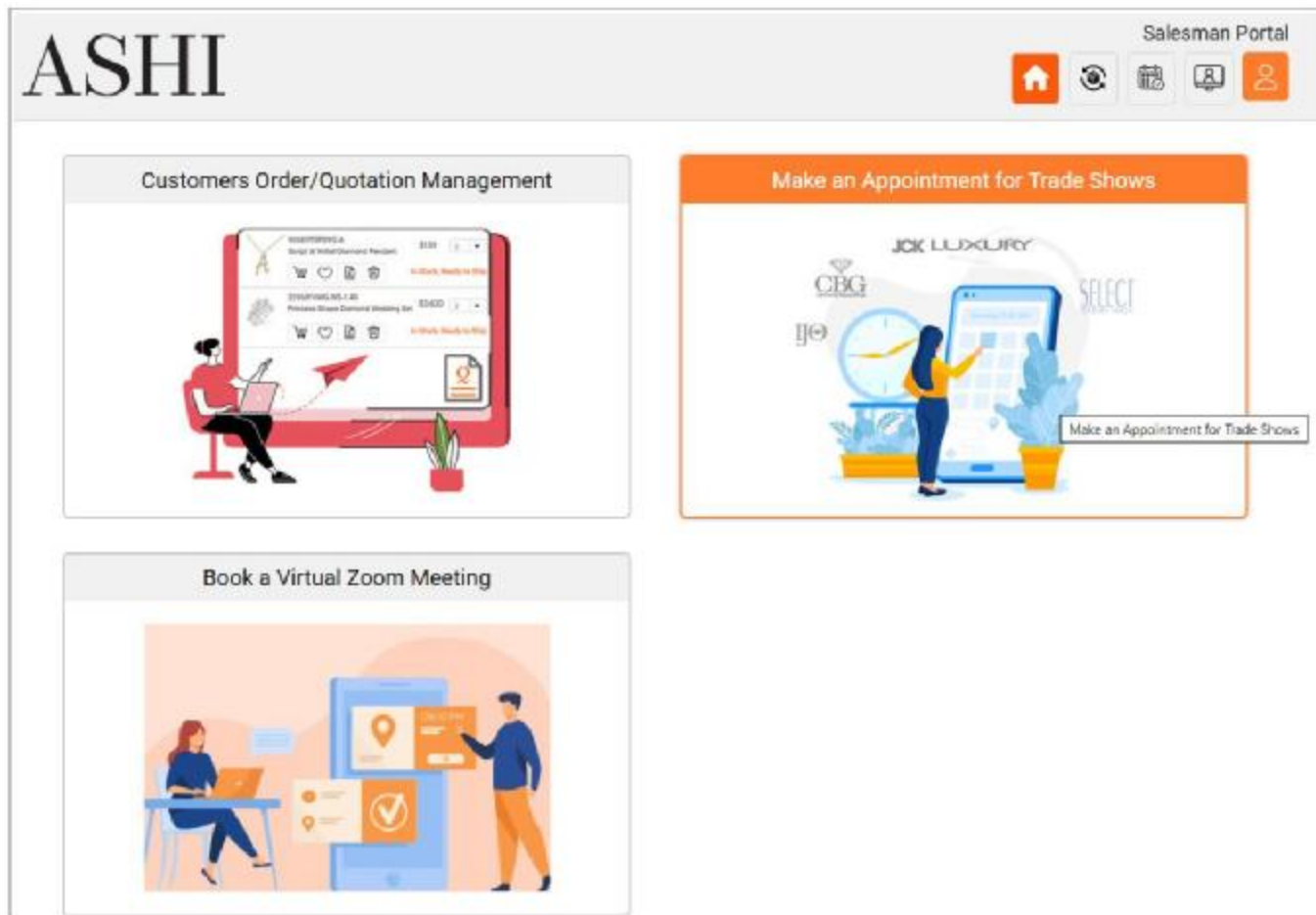
## MAKE AN APPOINTMENT

1. Once logged in, navigate to the 'Make an Appointment' section in the dashboard. Here, you can create Show Appointments for your existing customers as well as prospective customers.

The screenshot shows the ASHI Salesman Portal dashboard. At the top left is the ASHI logo. At the top right, there is a navigation bar with icons for Home, Refresh, Make an Appointment (highlighted with a red box), Logout, and Profile. Below the navigation bar, the page title is "Salesmen Admin - Search ASHI Customer". A welcome message reads "Welcome SACHIN NAHTA" and "Please Search and Select your Customer to Access their Account and Order Information." The main section is titled "Search ASHI Customer" and contains a search input field labeled "Search By Keywords:". Below the input field, there is a note: "(Search by ASHI Account Id (Jewelsoft Id), Customer Name, City, State and Tel #)". A row of letters from A to Z is displayed, with "All" selected. A "SEARCH" button is located below the letters. At the bottom right of the search section, there is a "Manage Customer" link with an information icon. Below the search section, there is a pagination area showing "Showing 1 - 50 of 514 Records" and navigation links: "<< First Page < Previous 1 2 3 4 5 ... Next > Last Page >>". At the bottom, there is a table with columns for ASHI Account Id, Customer Name, Main Contact, City, State, Tel1, Email Id, Website URL, PL | Buying Group, ASHI B2B, Avalon, Website, I Do | LB, Website, and Customer Detail. The Customer Detail column contains a "Manage Customer" link.

This close-up shows the "Salesman Portal" navigation bar. It contains five icons: Home, Refresh, Make an Appointment (highlighted with a white box), Logout, and Profile. The text "Salesman Portal" is centered above the icons.







2. You can also go to the Home page and click on 'Make an Appointment for Trade Shows' to schedule Show Appointments.



3. On clicking 'Make an Appointment', a pop-up is displayed with the first six active shows in chronological order. You can select 'Remember This Trade Show' if you'd like to make multiple appointments for the same show, and then click on the Next button.

Make an Appointment with ASHI

Please select a Trade Show to Make an Appointment for Your Customer

<input type="radio"/> <b>IJO Spring Show</b>  Palm Springs, CA Show Dates: Mar 1 - 4, 2025	<input type="radio"/> <b>Leading Jewelers Guild Show</b>  The Ballantyne Charlotte, NC Show Dates: Mar 9 - 10, 2025	<input type="radio"/> <b>Atlanta Jewelry Show</b>  Cobb Galleria Centre Atlanta, GA Booth # 523 & 525 Show Dates: Mar 15 - 16, 2025
<input type="radio"/> <b>CBG Las Vegas Summer Show</b>  Caesars Palace Las Vegas, NV Show Dates: May 27 - 28, 2025	<input checked="" type="radio"/> <b>Luxury Las Vegas Show</b>  The Venetian Expo Las Vegas, NV Booth # LUX 1227 Show Dates: Jun 4 - 9, 2025	<input type="radio"/> <b>JCK Las Vegas Show</b>  The Venetian Expo Las Vegas, NV Booth # LUX 1227 Show Dates: Jun 6 - 9, 2025

Remember This Trade Show

**NEXT**


4. In the left pane, you can view the details of the selected show for which you want to schedule an appointment.
5. You can schedule an appointment for an Existing ASHI Customer by selecting from the drop-down or by entering New Customer details manually.

### Make an Appointment with ASHI

## Luxury

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday



[Change Trade Show](#)

Please select an existing **ASHI Customer** or enter **New Customer Details** >

Existing ASHI Customer\*:

OR

Enter New Customer\*:

**NEXT**

## SELECT EXISTING ASHI CUSTOMER

6. You can select any of your existing customers from the 'Select Existing ASHI Customer' drop-down. The drop-down includes a "Keyword Search" feature, allowing you to search by typing a customer name, city, or state.
7. The results are filtered based on your input, and the drop-down will display all the customers matching the keyword. All your existing customers are listed in alphabetical order.

The screenshot displays the 'Make an Appointment with ASHI' interface. On the left, there is a sidebar for the 'Luxury' show, including details like 'Luxury Las Vegas Show', 'The Venetian Expo', and dates from June 4 to June 9, 2025. Below this is a photo of the ASHI trade show booth and a 'Change Trade Show' link. The main area prompts the user to 'Please select an existing ASHI Customer or enter New Customer Details >'. It features two input fields: 'Existing ASHI Customer\*' and 'Enter New Customer\*'. An 'OR' separator is between them. A search dropdown is open for the 'Existing ASHI Customer\*' field, showing a search for 'jack' and a list of filtered results including 'BARNETT FAMILY ENTERPRISES, INC (FL) | JACKSONVILLE, FL', 'CC. MEDAWAR JEWELERS LLC (JACKSON) | JACKSON, MI', 'JACK LEWIS JEWELERS, LLC (IL) | BLOOMINGTON, IL', 'JACKSON JEWELERS, INC. (MS) | FLOWOOD, MS', 'JEWELRY MARKETING, INC. (JACKSON, MS) | JACKSON, MS', 'PICKETT BROTHERS, INC (FL) | JACKSONVILLE, FL', and 'ROBERTS JEWELRY COMPANY, INC. (TN) | JACKSON, TN'. An orange 'NEXT' button is located at the bottom right of the main area.


8. Click on the Next button, and this popup will display the selected customer’s basic information, pre-filled and non-editable.
9. You need to add Show Visitor either by selecting Existing Users or by selecting New User Option. The existing User Option will only appear if customers are approved on the ASHI B2B Platform.
10. Once you select the existing User option, a dropdown list of all the users listed for the selected retailer. If there are no additional users defined in the B2B Admin Account then only Retailer Admin User will appear.
11. You can select multiple users from the drop-down by clicking the checkbox next to each user. The drop-down lists the users based on their assigned roles.

Make an Appointment with ASHI
X

## Luxury

**Show Details:**  
 Luxury Las Vegas Show  
 The Venetian Expo  
 Las Vegas, NV  
 Booth # LUX 1227

**Show Dates:**  
 June 4, 2025 - Wednesday  
 June 5, 2025 - Thursday  
 June 6, 2025 - Friday  
 June 7, 2025 - Saturday  
 June 8, 2025 - Sunday  
 June 9, 2025 - Monday



[Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

\*Company Name:  ≡

\*City | State:

\*Tel | Website:

\*Add Show Visitor:  Existing User  New User i

4 Existing User(s) Selected

**Retailer Admin**

MR. JERRY LAKE - avalontester1@gmail.com

**Purchase Manager**

Borkar Ranu - ranu.borkar@gmail.com

Jessica Silbert - jessicaraesilbert@gmail.com

Nahta Sachin - SACHINNAHTA@AVALONSOLUTION.COM

Rajeev Pandya - rajeevkpandya@gmail.com

\*Appointment Time:

Comments:

SUBMIT


12. If you do not find the user, in the Existing User dropdown, whom you want to invite for the show, then you can opt for the 'New User' option to book an appointment.
13. On the selection of the New User option, you need to add the Visitor Name and Email Address manually in the respective fields. If you want to add multiple visitors then click the '+' icon to add the additional visitor. Click the Submit button to fix the appointment for the visitors.

Make an Appointment with ASHI
✕

## Luxury

**Show Details:**  
 Luxury Las Vegas Show  
 The Venetian Expo  
 Las Vegas, NV  
 Booth # LUX 1227

**Show Dates:**  
 June 4, 2025 - Wednesday  
 June 5, 2025 - Thursday  
 June 6, 2025 - Friday  
 June 7, 2025 - Saturday  
 June 8, 2025 - Sunday  
 June 9, 2025 - Monday



[⇌ Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

\*Company Name:  ⌵

\*City | State:   ⌵

\*Tel | Website:

\*Add Show Visitor:  Existing User  New User ℹ

+

**EXISTING USER(S)**

- MR. JERRY LAKE - avalontester1@gmail.com 🗑
- Borkar Ranu - ranu.borkar@gmail.com 🗑
- Jessica Silbert - jessicaraesilbert@gmail.com 🗑
- Nahta Sachin - SACHINNAHTA@AVALONSOLUTION.COM 🗑

**NEW USER(S)**

- Renee Parker - reneeparker@email.com 🗑
- Christopher Paul - chrispaul@email.com 🗑

\*Appointment Time:  ⌵  ⌵

Comments:

SUBMIT

14. Please Note: You can add up to a total of 10 users, including both Existing Users and New Users. You can also use both the Show Visitor Options at the same time.

The screenshot displays the user management interface. At the top, there are dropdown menus for \*City | State (JACKSON) and MS - Mississippi. Below that is a \*Tel | Website field with the number 60. A yellow callout box points to the user management section, containing the text: "You can add up to a total of 10 email addresses, including both Existing and New Users." Under \*Add Show Visitor, there are checkboxes for Internal User (unchecked) and New User (checked), with an information icon. Below these are two input fields: "Enter Visitor Name" and "Enter Visitor Email" with an orange plus icon. The interface is divided into two sections: "EXISTING USER(S)" and "NEW USER(S)".


EXISTING USER(S)	
MR. JERRY LAKE - avalontester1@gmail.com	
Borkar Ranu - ranu.borkar@gmail.com	
Jessica Silbert - jessicaraesilbert@gmail.com	
Nahta Sachin - SACHINNAHTA@AVALONSOLUTION.COM	





NEW USER(S)	
Renee Parker - reneeparker@email.com	
Christopher Paul - chrispaul@email.com	

15. You can delete any Existing User or New User by clicking the 'Delete' icon next to each entry.



\*Add Show Visitor:  Internal User  New User ⓘ

Enter Visitor Name:  Enter Visitor Email:  



**EXISTING USER(S)**

MR. JERRY LAKE - avalontester1@gmail.com	
Borkar Ranu - ranu.borkar@gmail.com	
Jessica Silbert - jessicaraesilbert@gmail.com	
Nahta Sachin - SACHINNAHTA@AVALONSOLUTION.COM	

**NEW USER(S)**

Renee Parker - reneeparker@email.com	
Christopher Paul - chrispaul@email.com	

**NEW USER(S)**

Renee Parker - reneeparker@email.com	
Christopher Paul - chrispaul@email.com	

16. By clicking 'Change Trade Show', you can switch to a different show at any time if you want to schedule an appointment for another show.

**Make an Appointment with ASHI**

**Luxury**

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday

[Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

\*Company Name: JEWELRY MARKETING, INC. (JACKSON, MS)

\*City | State: JACKSON MS - Mississippi

\*Tel | Website: 601-354-3549 CARTERDIAMONDS.COM

\*Add Show Visitor:  Existing User  New User

Select Existing User(s)

\*Appointment Time: Select Date Select Time

Comments: Comments

**SUBMIT**

17. You will be redirected to the 'Please Select a Trade Show to Make an Appointment for Your Customer' pop-up, where you can select a different show and proceed further.

18. By clicking 'Change Company Name', you can switch to a different customer at any time if you want to schedule an appointment for another customer.

Make an Appointment with ASHI

## Luxury

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday

[Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

\*Company Name: JEWELRY MARKETING, INC. (JACKSON, MS) Change Company Name

\*City | State: JACKSON MS - Mississippl

\*Tel | Website: 601-354-3549 CARTERDIAMONDS.COM

\*Add Show Visitor:  Existing User  New User ⓘ

Select Existing User(s)

\*Appointment Time: Select Date Select Time

Comments: Comments

**SUBMIT**

19. You will be redirected to the 'Please select an existing ASHI Customer or enter New Customer Details' pop-up, where you can select a different customer or enter new customer details, and proceed further.

## ENTER NEW CUSTOMER


20. To make an appointment for a prospective customer, enter the Company Name under the Enter New Customer field and click on the Next button.

Make an Appointment with ASHI

### Luxury

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday



[⇌ Change Trade Show](#)

Please select an existing **ASHI Customer** or enter **New Customer** Details >

Existing ASHI Customer\*:

OR

Enter New Customer\*:

**NEXT**


21. Enter the necessary details for the appointment – City, State, Telephone, Visitors' Name and Email, Appointment Date & Time.

Make an Appointment with ASHI
✕

## Luxury

**Show Details:**  
 Luxury Las Vegas Show  
 The Venetian Expo  
 Las Vegas, NV  
 Booth # LUX 1227

**Show Dates:**  
 June 4, 2025 - Wednesday  
 June 5, 2025 - Thursday  
 June 6, 2025 - Friday  
 June 7, 2025 - Saturday  
 June 8, 2025 - Sunday  
 June 9, 2025 - Monday



[⇌ Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

\*Company Name:  ≡

\*City | State:   ▼

\*Tel | Website:

\*Add Show Visitor:  Add Visitor ℹ

+

\*Appointment Time:  ▼  ▼

Comments:

SUBMIT

22. Enter the visitor's name and email, then click the '+' icon to add the additional visitors. Click the Submit button to fix the appointment for the visitors.


23. You can delete any Visitor Info by clicking the 'Delete' icon next to each entry.

### Make an Appointment with ASHI

## Luxury

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday



[Change Trade Show](#)

**\*Please Add Show Visitors and Select Appointment Date & Time >**

**\*Company Name:** Velvet Vogue Jewelers

**\*City | State:** Dallas TX - Texas

**\*Tel | Website:** 851239456 www.velvetvogue.com

**\*Add Show Visitor:**  Add Visitor

Enter Visitor Name Enter Visitor Email

**VISITOR(S)**

Sophia Evans - sophia.evans@testmail.com

**\*Appointment Time:** June 7, 2025 - Saturday 4:00 PM

**Comments:** Comments

**SUBMIT**

24. Please Note: You can add up to a maximum of 10 visitors.

**\*Tel | Website:** 851239456 www.velvetvogue.com

**\*Add Show Visitor:**  Add Visitor

Ethan Carter ethan.carter@testmail.com

**VISITORS**

Sophia Evans - sophia.evans@testmail.com

## CONFIRM AND SEND APPOINTMENT DETAILS


25. Review the appointment details and confirm the information you have entered. Click the Submit button to send the appointment details to the respective users and visitors.

Make an Appointment with ASHI

# Luxury

**Show Details:**  
Luxury Las Vegas Show  
The Venetian Expo  
Las Vegas, NV  
Booth # LUX 1227

**Show Dates:**  
June 4, 2025 - Wednesday  
June 5, 2025 - Thursday  
June 6, 2025 - Friday  
June 7, 2025 - Saturday  
June 8, 2025 - Sunday  
June 9, 2025 - Monday



Thank You! Your Customer's Appointment with ASHI is confirmed.  
Your customer will receive an email with their appointment time and ASHI booth location.

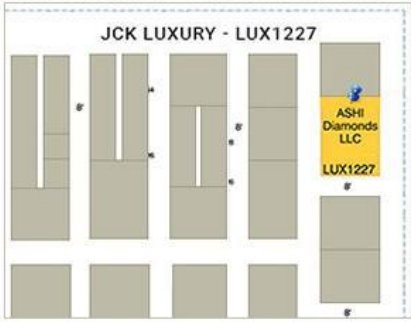
**Customer Information**  
JEWELRY MARKETING, INC. (JACKSON, MS)

**Appointment Information**

Show:  
**Luxury Las Vegas Show**

Date:  
**June 7, 2025 - Saturday**

Time:  
**3:30 PM**



JCK LUXURY - LUX1227

ASHI Diamonds LLC  
LUX1227

UNIONTOWN DANETTE@ABRYSCOLDANCEMS.COM Yes SELECT CH


## RECEIVE CONFIRMATION EMAIL

26. Once the appointment is scheduled, ASHI, the salesperson, and the customer will receive a confirmation email with the appointment details.
27. If you have selected multiple users then each user will receive a separate copy of the Make an Appointment Email.
28. You will receive the ASHI Copy of Email which will list all the Users that you have selected for the show.

### Customer Copy

Appointment Scheduled with ASHI for the Luxury Las Vegas Show on June 7, 2025 - Saturday at 4:00 PM Inbox x

ContactUs@ashiamonds.com  
to SACHINNAHTA ▾



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Dear Nahta Sachin,  
JEWELRY MARKETING, INC. (JACKSON, MS)


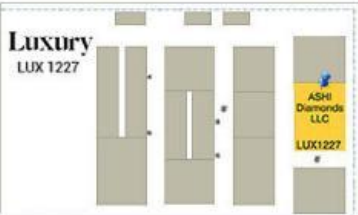
Thank You for Scheduling an appointment with ASHI for the Luxury Las Vegas Show.  
Please note our **Luxury Las Vegas Show - ASHI Booth # LUX 1227**.

**This Appointment has been made by your ASHI Customer Service Representative SACHIN NAHTA on your behalf.**

We are delighted to tell you that your appointment has been confirmed, and we ask that you mark your calendar!

ASHI is proud to announce its \$50,000 donation to the Leukemia & Lymphoma Society (LLS), the world's largest organization dedicated to curing leukemia, lymphoma, and other blood cancer diseases while improving the quality of life for patients and their families. [Learn More >>](#)

Please see your Show Appointment details below:

<b>Company:</b>	JEWELRY MARKETING, INC. (JACKSON, MS)	<p>ASHI'S Booth Map at the Luxury / JCK Las Vegas Show</p> 
<b>City:</b>	JACKSON	
<b>State:</b>	MS - Mississippi	
<b>Telephone #:</b>	601-354-3549	
<b>Website:</b>	<a href="http://CARTERDIAMONDS.COM">CARTERDIAMONDS.COM</a>	
<b>Show Visitor:</b>	Nahta Sachin	
<b>Visitor Email Id:</b>	<a href="mailto:SACHINNAHTA@AVALONSOLUTION.COM">SACHINNAHTA@AVALONSOLUTION.COM</a>	
<b>Show:</b>	Luxury Las Vegas Show	
<b>Appointment Date:</b>	June 7, 2025 - Saturday	
<b>Appointment Time:</b>	4:00 PM	
<b>Comments:</b>	Your appointment is scheduled for Saturday, June 7, 2025 at 4:00 PM.	

## ASHI Copy

Appointment Scheduled with ASHI for the Luxury Las Vegas Show on June 7, 2025 - Saturday at 4:00 PM Inbox x



Dear ASHI Team,

SACHIN NAHTA from JEWELRY MARKETING, INC. (JACKSON, MS) has scheduled an appointment with ASHI for the Luxury Las Vegas Show on June 7, 2025 - Saturday at 4:00 PM.

**This Appointment has been made by ASHI Customer Service Representative SACHIN NAHTA on Customer's behalf.**

Please find their information below and update the ASHI Luxury Las Vegas Show Appointment Calendar:

Req Date: Feb 07, 2025  
Req Email Trans #: 4982  
IP Address: 173.68.171.170  
IP Location: New York, NY, US

**Company:** JEWELRY MARKETING, INC. (JACKSON, MS)  
ASHI Jewelfsoft Id: ABBYSUNPA  
City: JACKSON  
State: MS - Mississippi  
Telephone #: 601-354-3549  
Website : [CARTERDIAMONDS.COM](http://CARTERDIAMONDS.COM)

**Show Visitor(s):**  
Borkar Ranu ([ranu.borkar@gmail.com](mailto:ranu.borkar@gmail.com))  
Nahta Sachin ([SACHINNAHTA@AVALONSOLUTION.COM](mailto:SACHINNAHTA@AVALONSOLUTION.COM))  
Sophia Evans ([sophia.evans@testmail.com](mailto:sophia.evans@testmail.com))

**Show:** Luxury Las Vegas Show  
**Appointment Date:** June 7, 2025 - Saturday  
**Appointment Time:** 4:00 PM  
**Comments:** Your appointment is scheduled for Saturday, June 7, 2025 at 4:00 PM.


**Thank You!**  
ASHI

29. When an appointment is scheduled for a new customer, the ASHI copy will display “NEW CUSTOMER” for the ASHI Jewelsoft ID. This helps both you and the ASHI team distinguish between existing and new customers.

### ASHI Copy

Velvet Vogue Jewelers - Appointment Scheduled with ASHI for the Luxury Las Vegas Show on June 7, 2025 - Saturday at 4:00 PM

ASHI  
to ContactUs, nearness, Shows ▾



Dear ASHI Team,

SACHIN NAHTA from Velvet Vogue Jewelers has scheduled an appointment with ASHI for the **Luxury Las Vegas Show on June 7, 2025 - Saturday at 4:00 PM**.

**This Appointment has been made by ASHI Customer Service Representative SACHIN NAHTA on Customer's behalf.**

Please find their information below and update the ASHI **Luxury Las Vegas Show** Appointment Calendar:

Req Date:	Feb 16, 2025
Req Email Trans #:	5015
IP Address:	150.129.146.82
IP Location:	Bhopal, MP, IN
Company:	Velvet Vogue Jewelers
ASHI Jewelsoft Id:	NEW CUSTOMER
City:	Dallas
State:	TX
Telephone #:	861239456
Website:	<a href="http://www.velvetvogue.com">www.velvetvogue.com</a>
Show Visitor(s):	Sophia Evans ( <a href="mailto:sophia.evans@testmail.com">sophia.evans@testmail.com</a> )
Show:	Luxury Las Vegas Show
Appointment Date:	June 7, 2025 - Saturday
Appointment Time:	4:00 PM