How to Use the Meeting Platform

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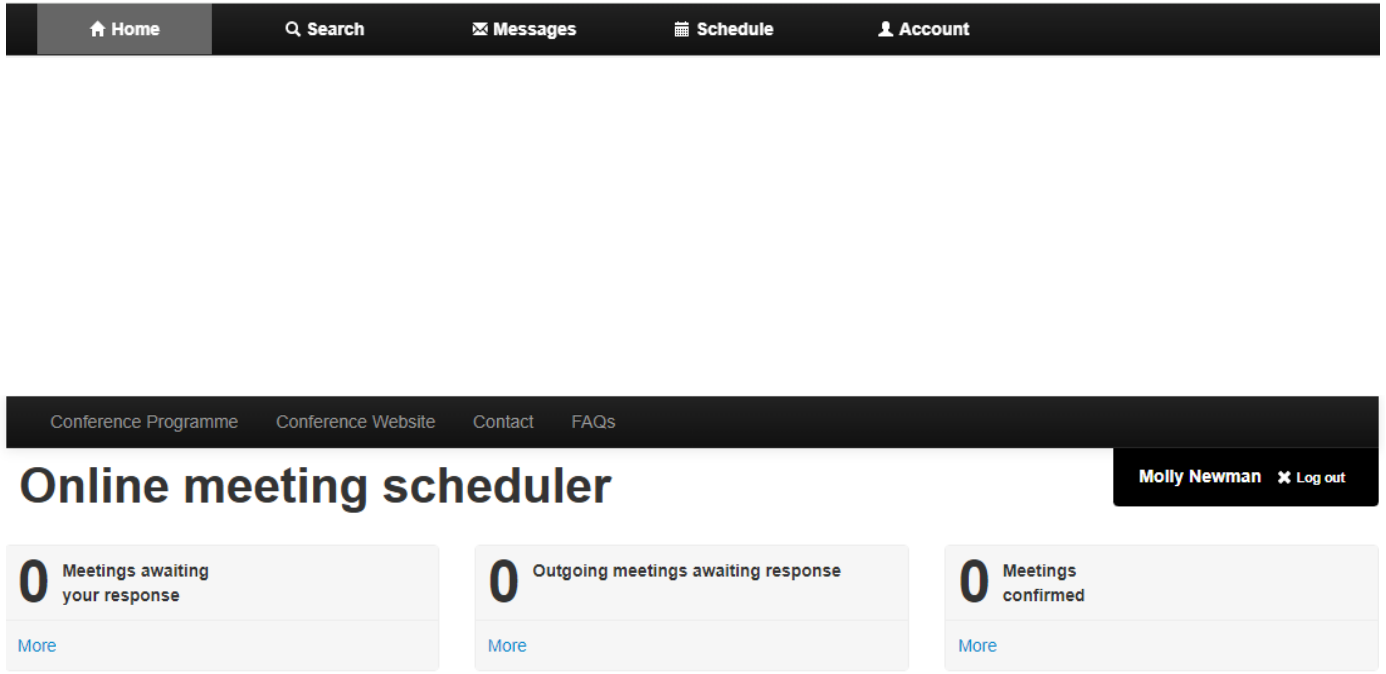
Access

You should have received an email from the platform, with the subject line
'Welcome to ..... Online Meeting Scheduling'.

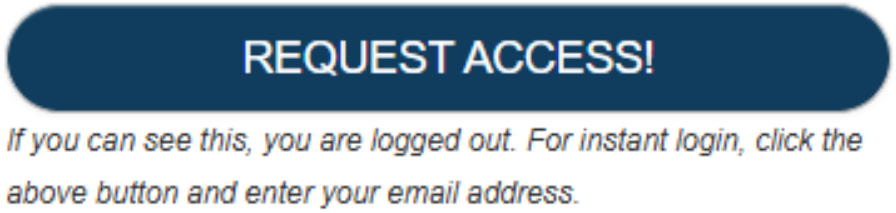
This contains a link, click it to gain immediate access to your online account.

You should see this on your screen



If instead you see this

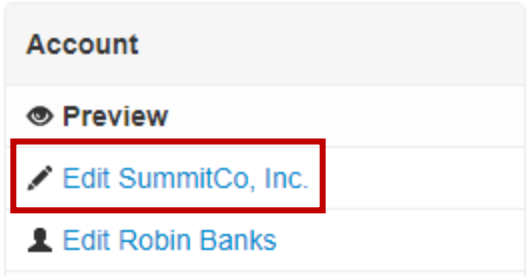
- click the button 'REQUEST ACCESS' and enter your email address to receive a new access link



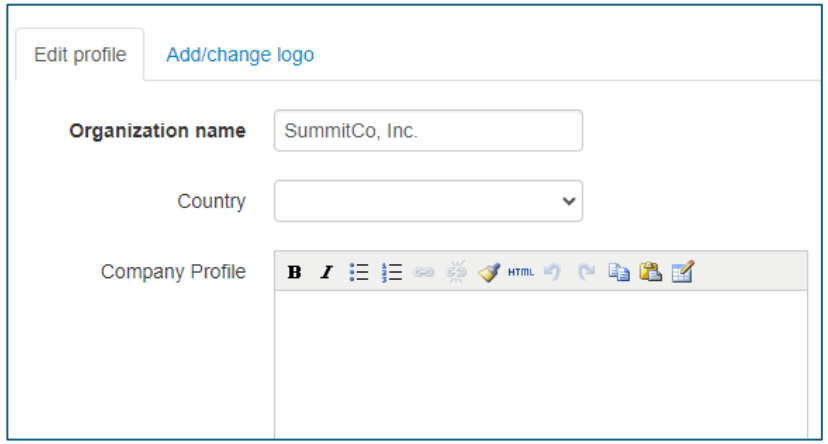
Profile Update: Company

1. Go to the Account link in the top menu bar:

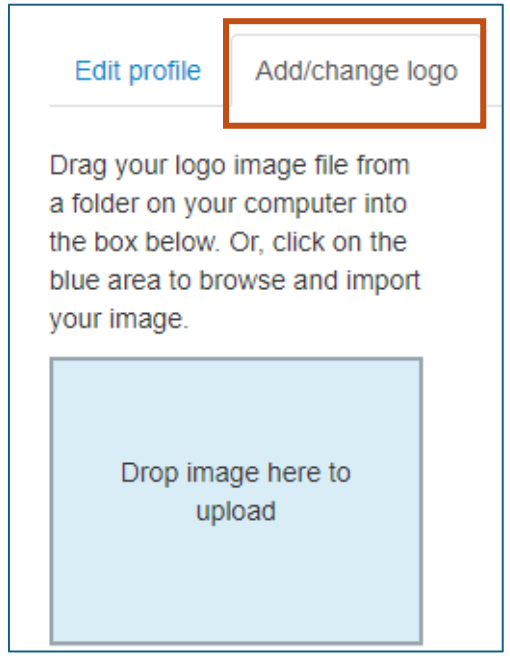
2. Click the Edit link at the left of the page to update your company profile:



3. Enter profile information, then Save



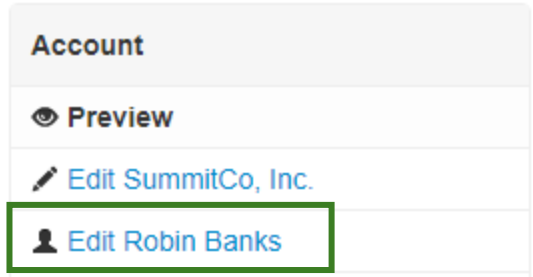
4. Add your company logo.
Click Add/change logo then drag/drop a .png or .jpg image file of less than 2Mb



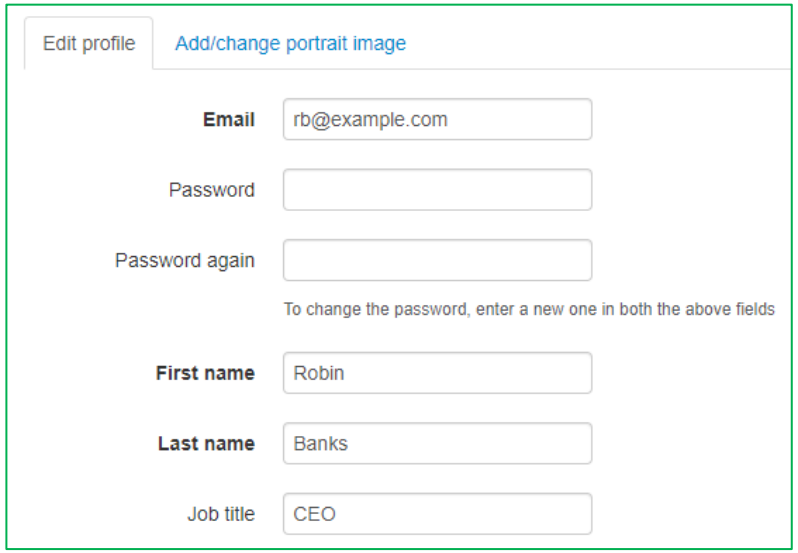
Make sure you click Save before leaving the Edit profile area.

Profile Update: Personal

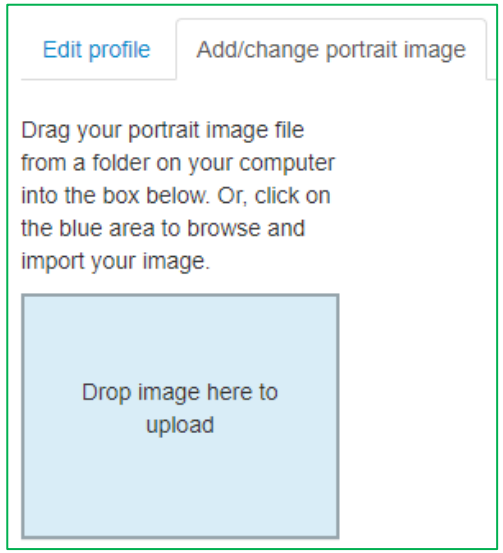
5. Click the Edit link at the left of the page to update your personal profile:



6. Check your personal details and update if needed. If you prefer to use password access, add an 8 character password to **both** password fields



7. Add your portrait photo. Click Add/change image then drag/drop a .png or .jpg photo file of less than 2Mb



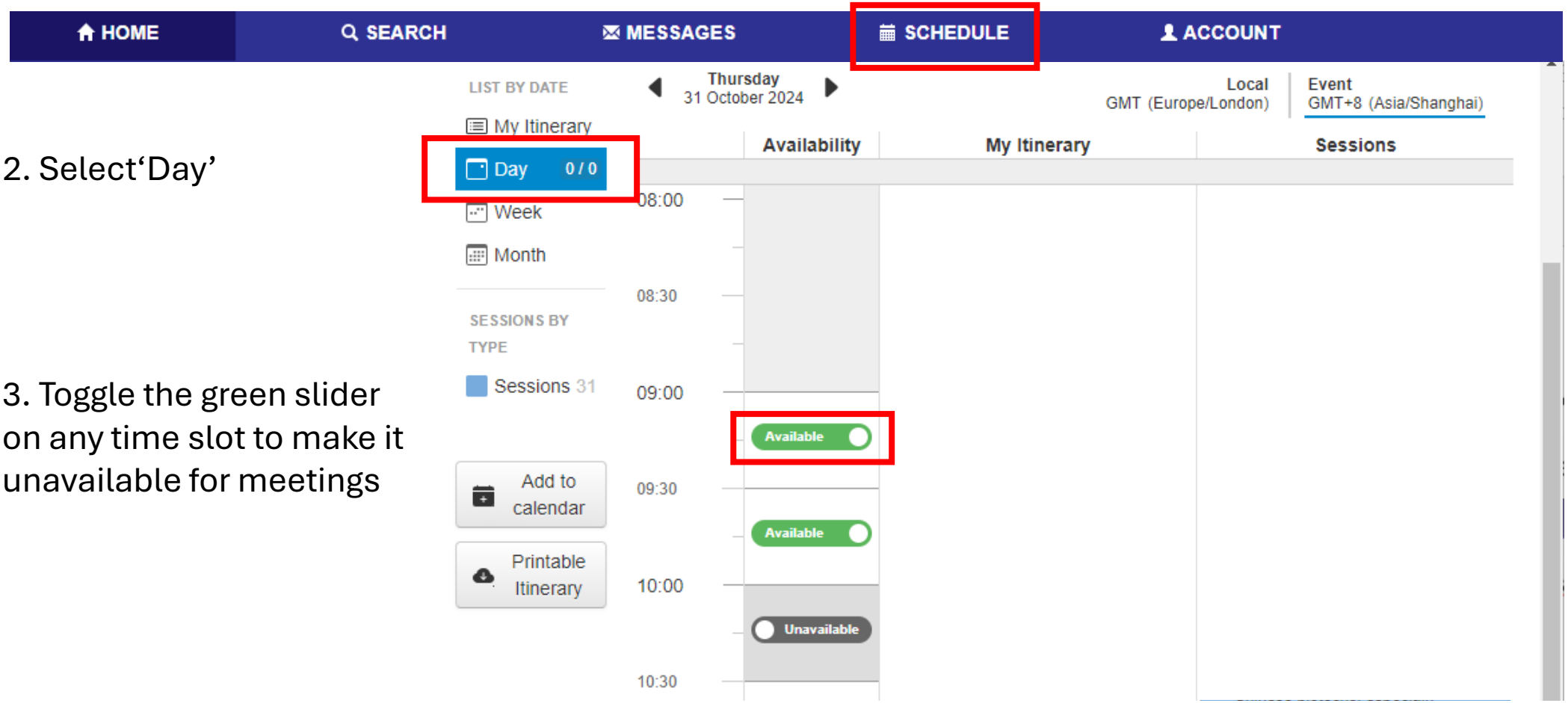
Make sure you click Save before leaving the Edit profile area.

Set Your Availability

1. Go to the Schedule link in the top menu bar:

2. Select‘Day’

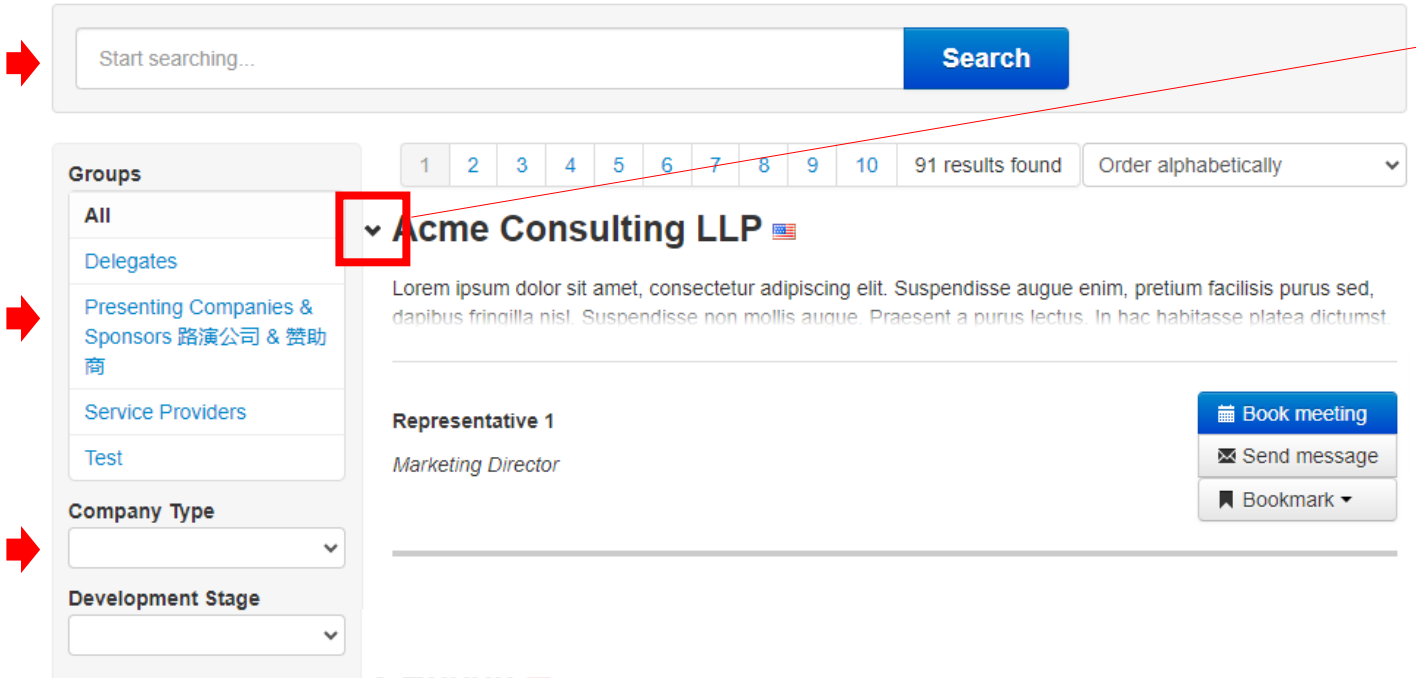
3. Toggle the green slider on any time slot to make it unavailable for meetings



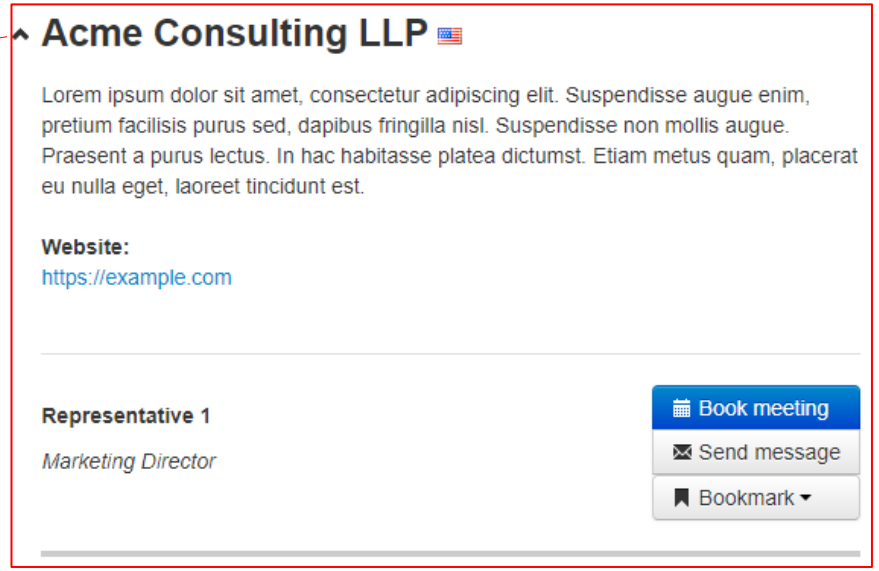
Find Meeting Partners and Book Meetings

1. Go to the Search in the top menu bar. You will find all organizations and attendees listed here:

2. Use the filters at the left and the text search field at the top to look for potential business targets

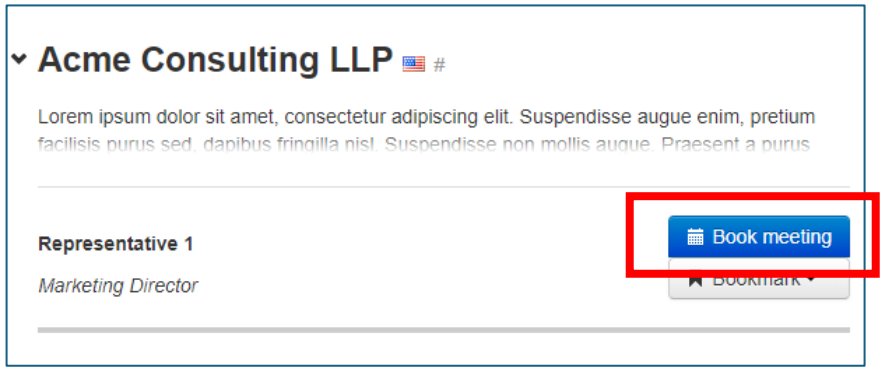


3. Click the arrow next to the company name to view their full profile.

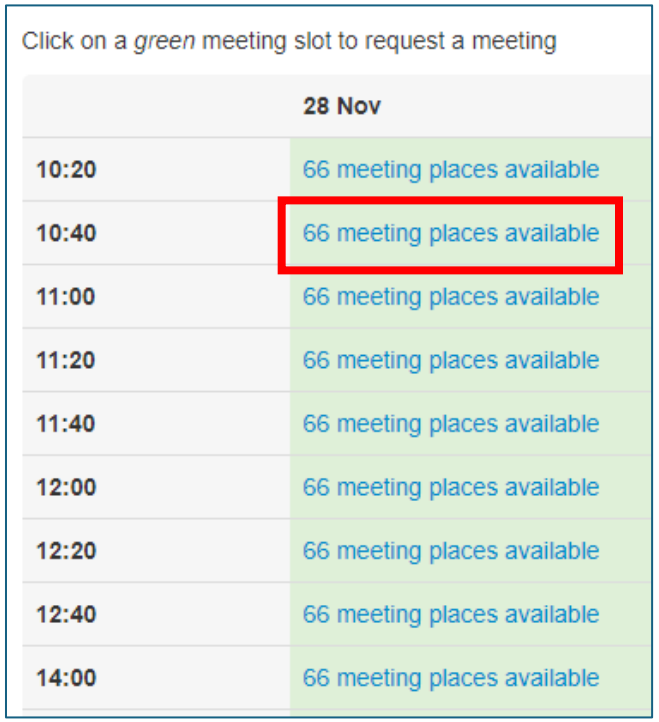


Book Meetings

1. Click the ‘Book meeting’ button next to the person you want to meet.

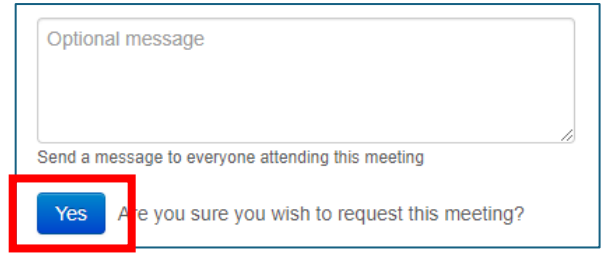


2. Select a meeting time. Only the green slots are available to both you and the other person.



3. Add a message to explain why you want to meet, then click ‘Yes’.

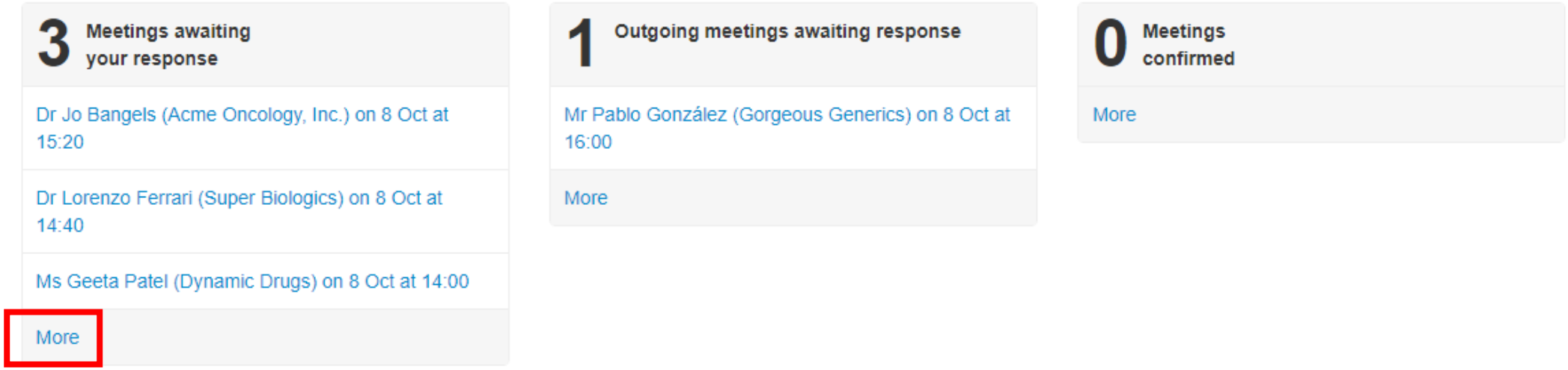
An email will be sent to the other person with your message, asking them to respond.



Manage Meetings - 1

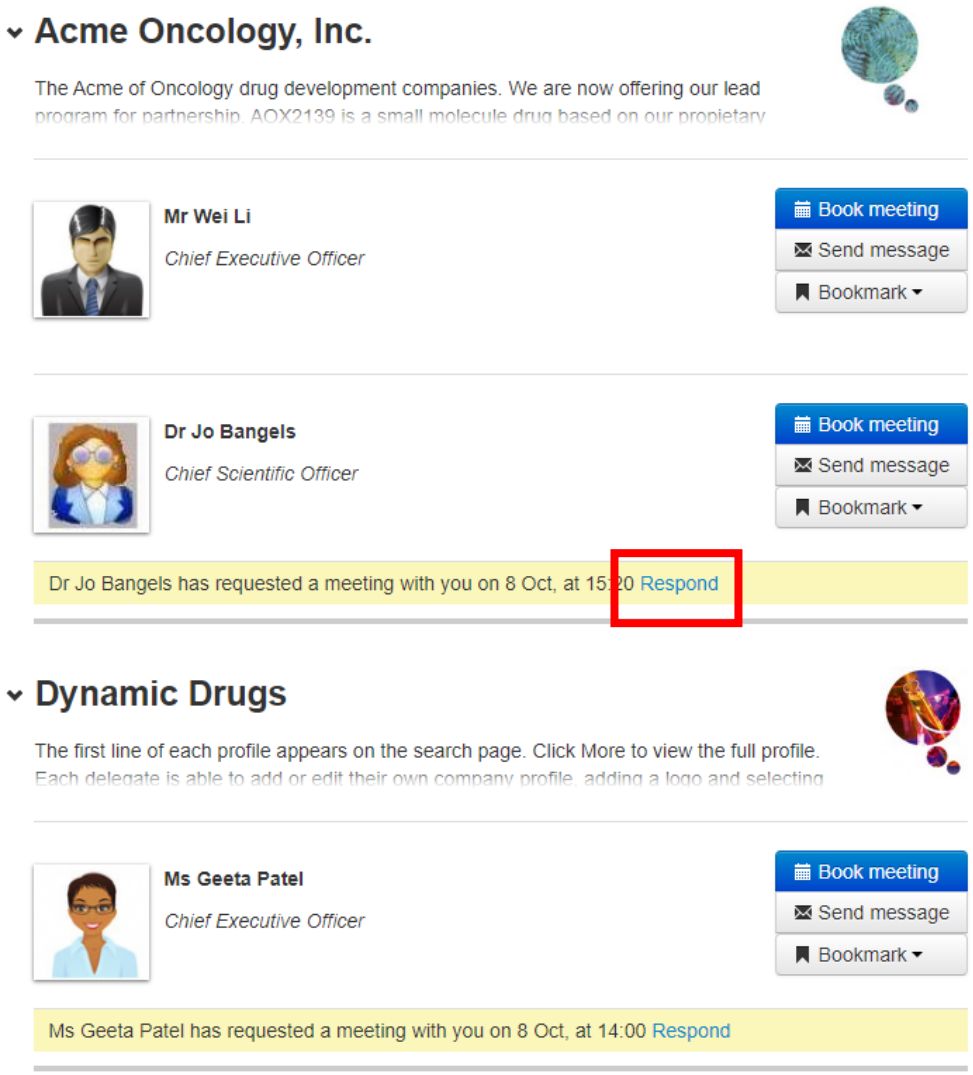
1. Your incoming meeting requests are listed on the Home page

2. Click ‘More’ to view the profiles of your requestors



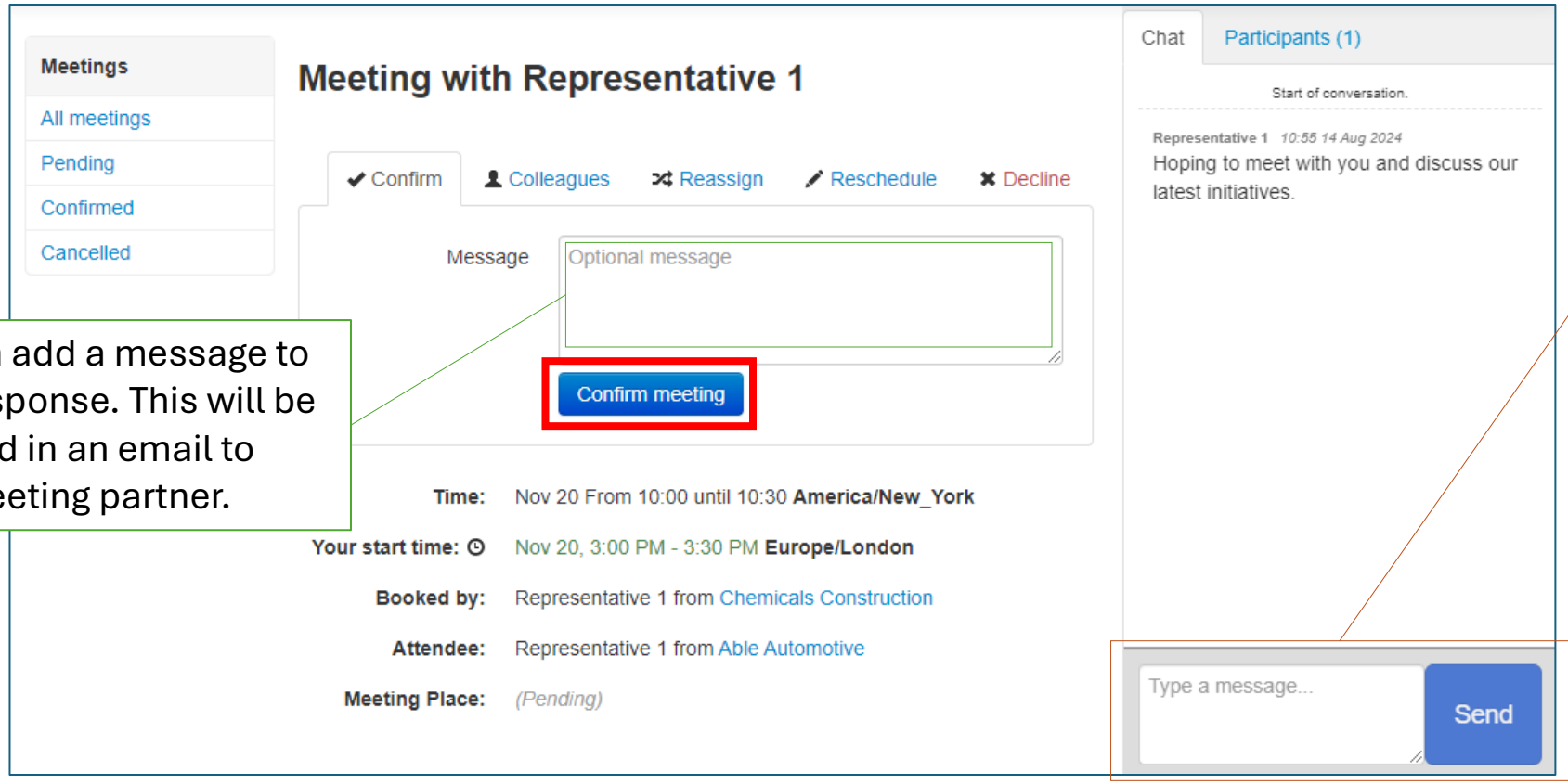
Manage Meetings - 2

3. Click ‘Respond’ beneath the name of each requestor to confirm or decline their request.



Manage Meetings - 3

4. Select your response from the console tabs. Be sure to click the button to complete the action.



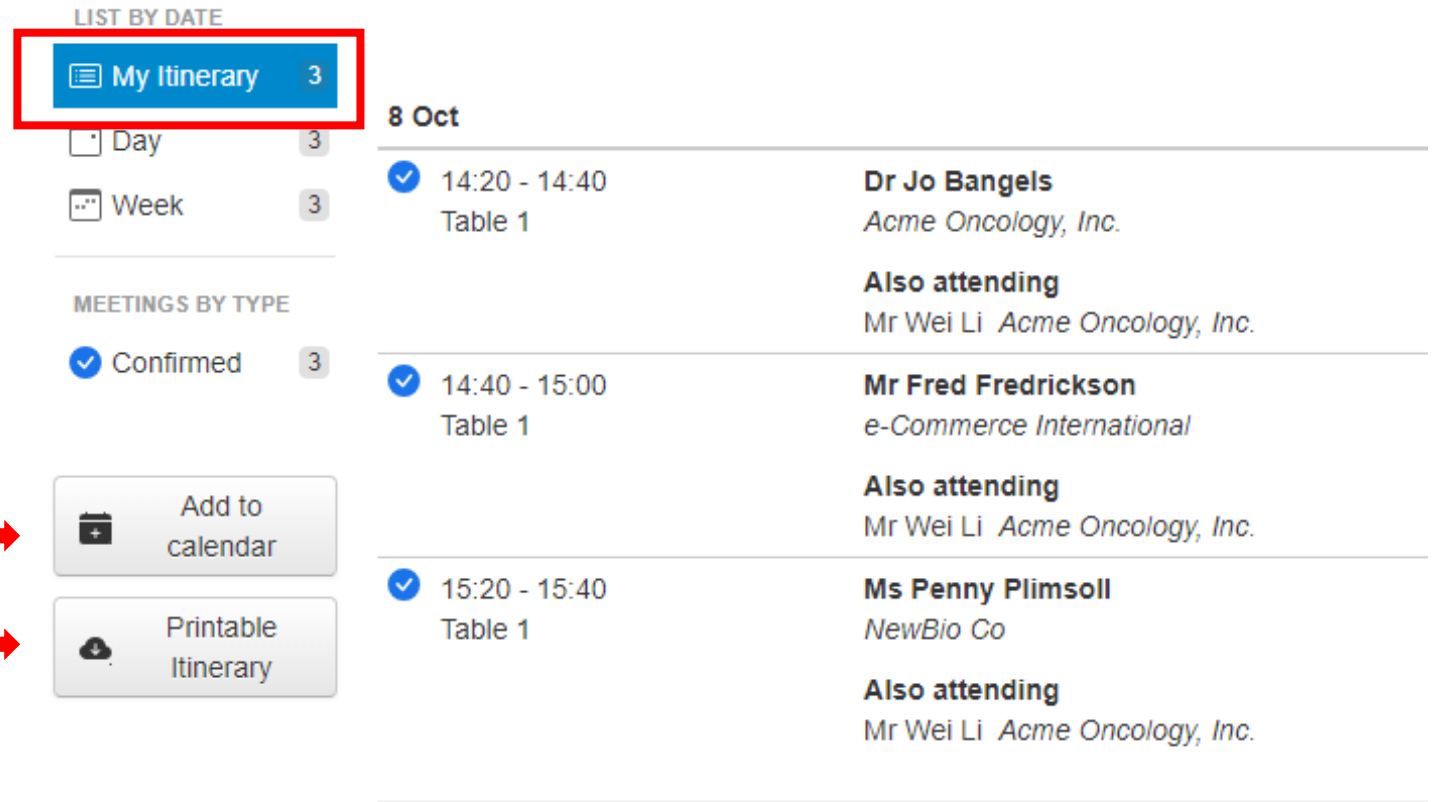
You can add a message to your response. This will be included in an email to your meeting partner.

You can send a private message via the Chat panel without changing the status of the meeting request

Personal Itinerary

1. Go to the Schedule link in the top menu bar:

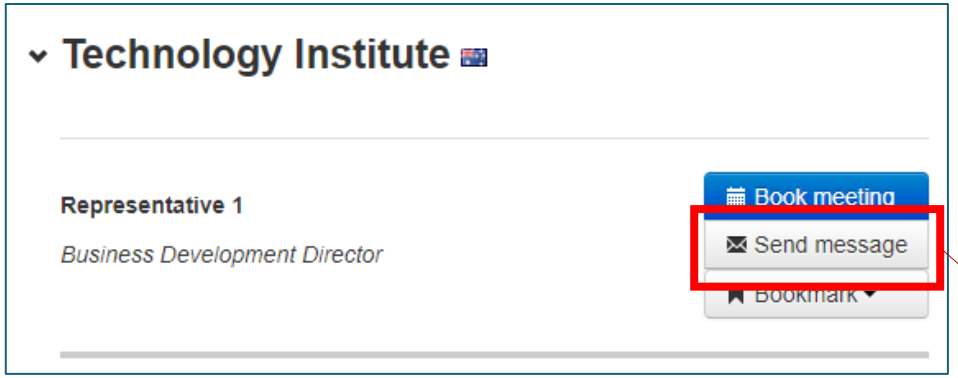
2. Select My Itinerary

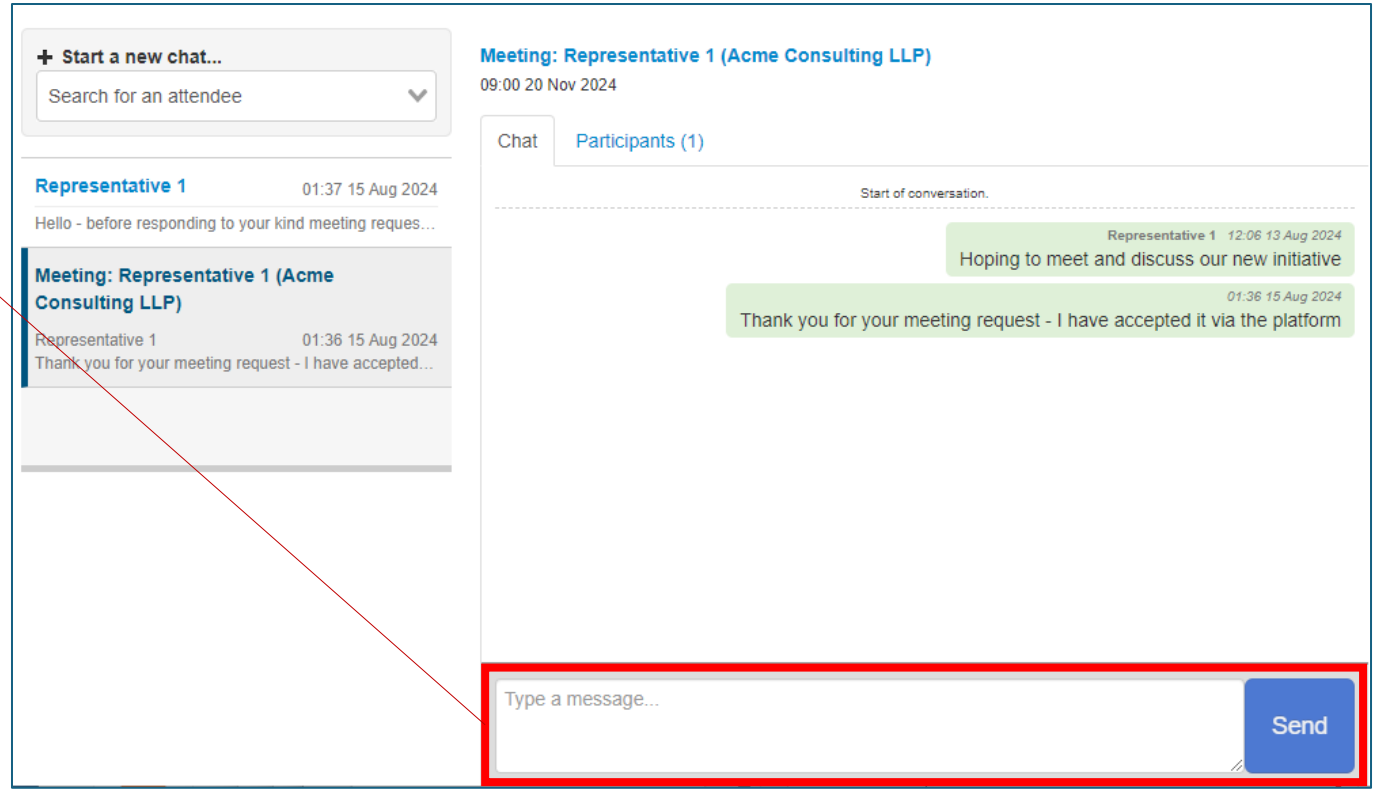


3. Follow the links at the left to download your Itinerary as a PDF and/or integrate it into your Outlook calendar.

Send Private Messages

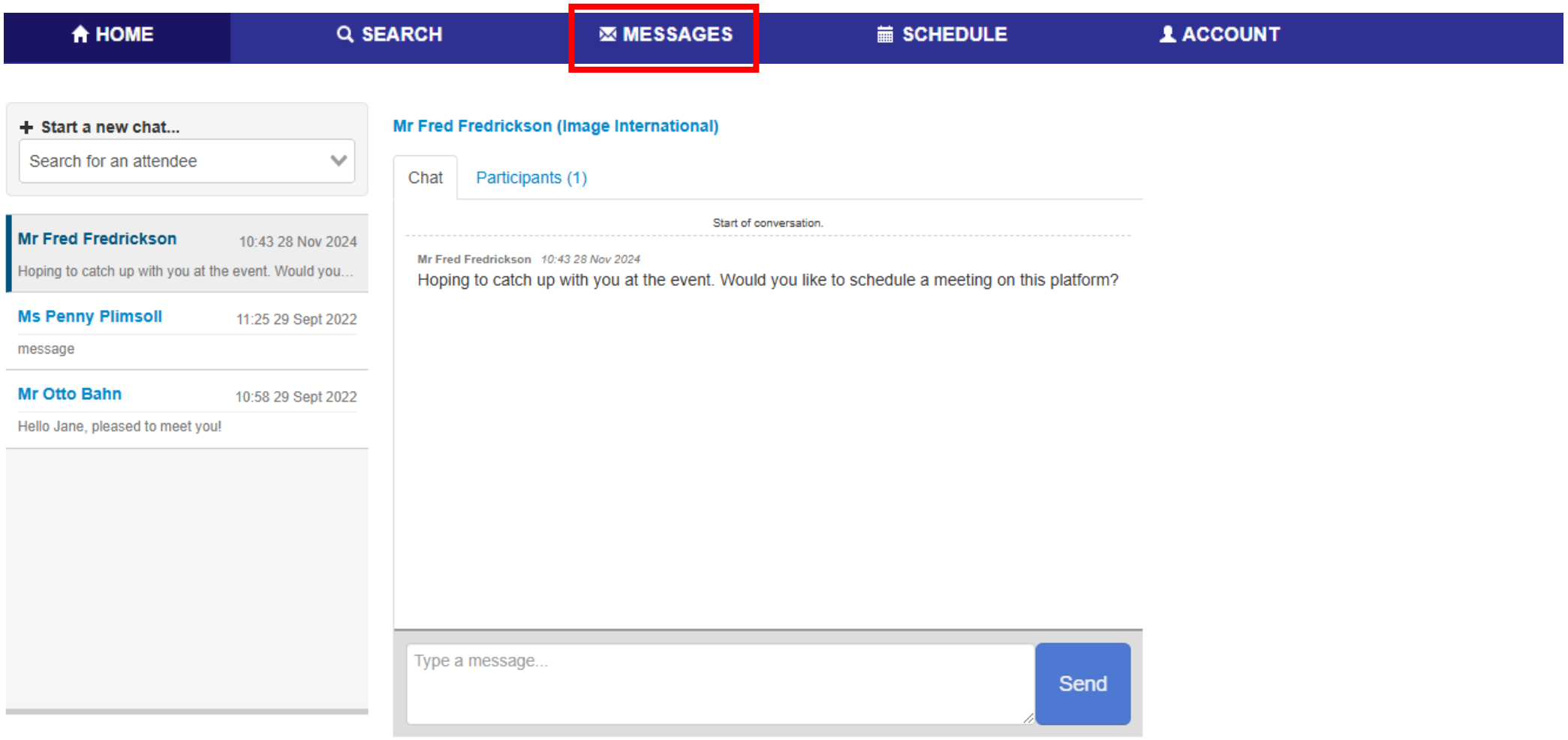
You can send an email message to any other attendee. On the Search page, click their Message button then type in your message.
The other attendee will receive your message within an email. This email will not reveal your contact details unless you include these in the message.





View Messages

Go to the Messages link in the top menu bar:



ENDS