ACG® Philadelphia

1:1 ONLINE MEETING & NETWORKING TOOL

TABLE OF CONTENTS

LOGGING IN & PROFILE SETUP

Registrants of the event will receive an email from "Presdo Match" (notification@presdomail.com) -- to the email address you used when you registered -- with a link to the homepage of the Interactive Attendee Directory & Networking Tool (below), and instructions on how to log in and use the tool.

If you are new to this tool, you will be asked to create a password. If you have used this tool before for a different event, you can use the same login as you had previously.

presdo★match

Enter the email address you used to register for the event or the username provided to you.

Email/username   khadden@acgboston.org
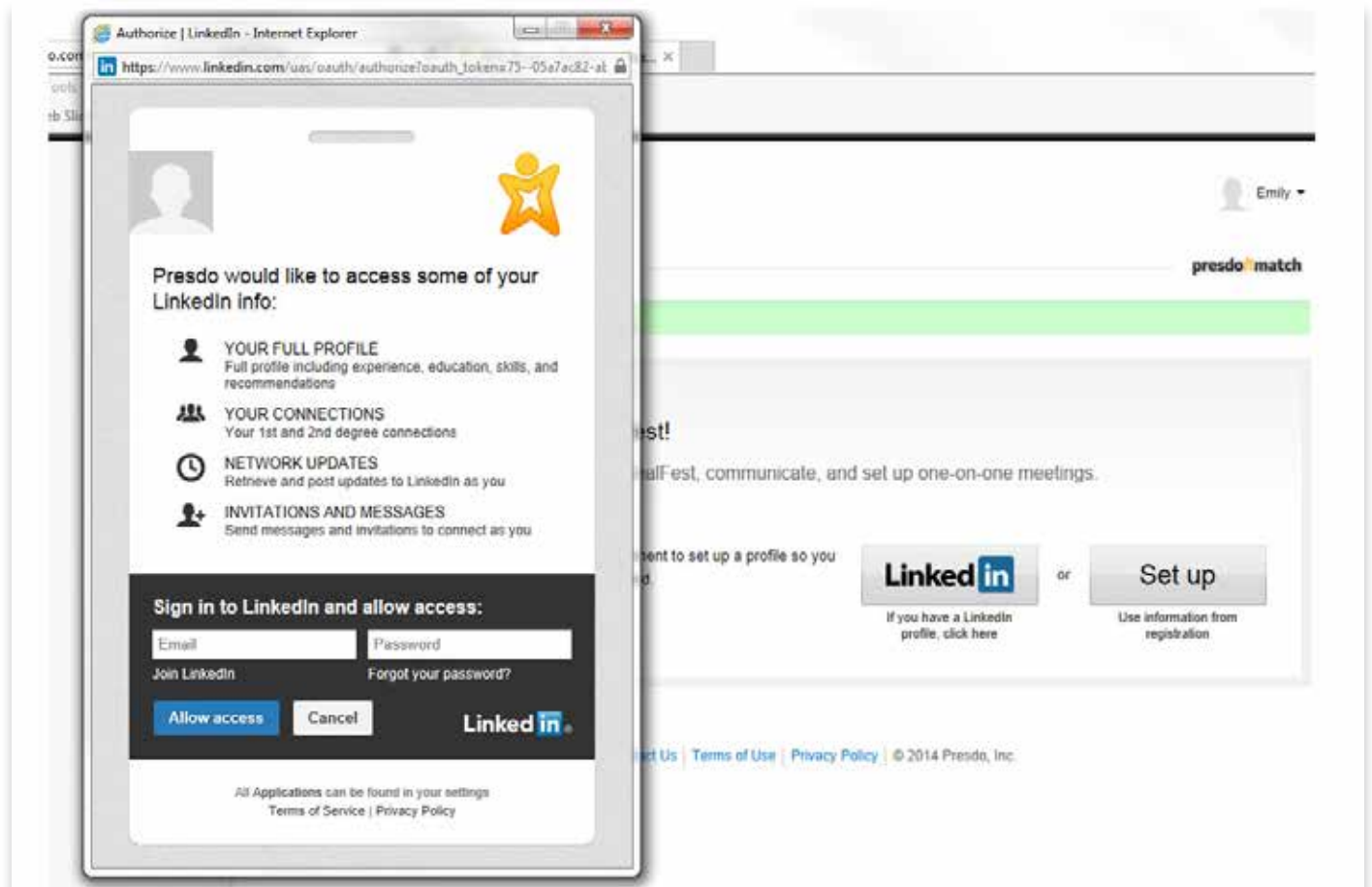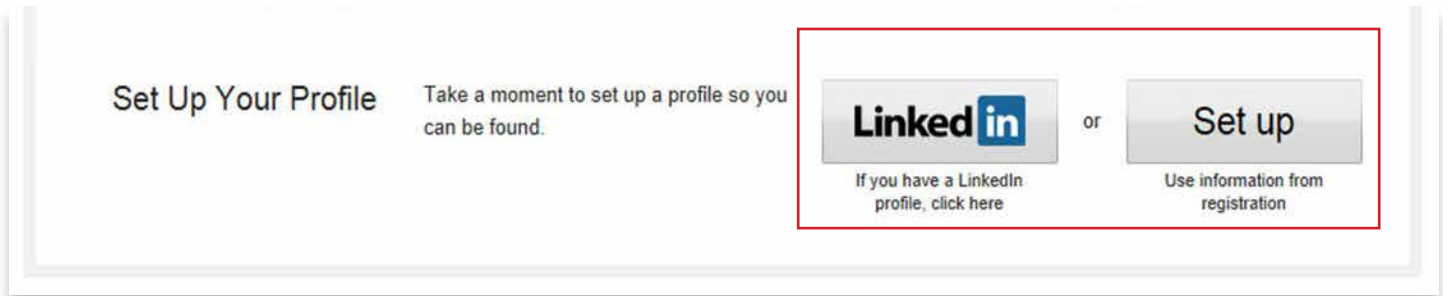
Password   ••••••••••••

☐ Remember me | Get Password

Sign in

Get Presdo Match to go. Go to **m.presdo.com**.

About | Contact Us | Terms of Use | Privacy Policy | © 2015 Presdo, Inc.
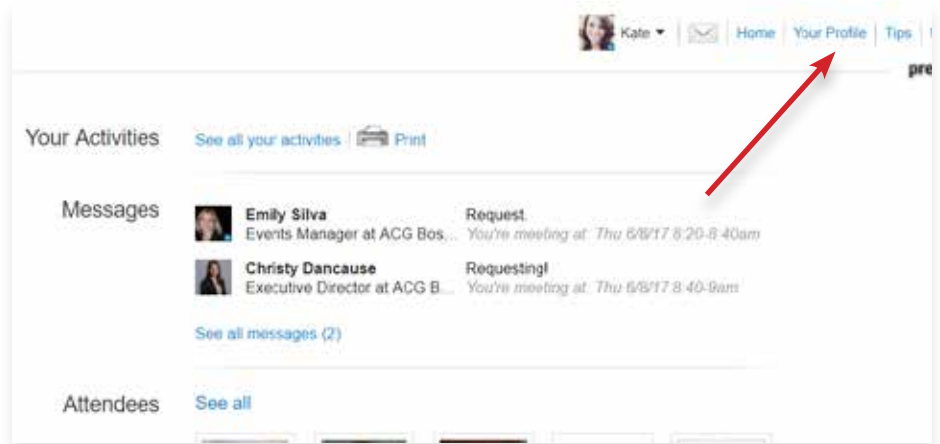
IMPORTING YOUR PROFILE

Next, you will be asked to set up your profile. You can either import your profile from LinkedIn, or set it up from scratch:
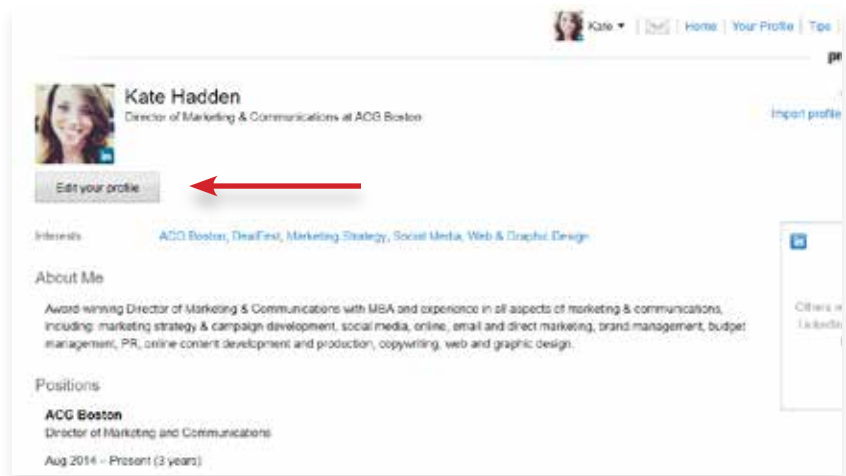
EDITING YOUR PROFILE

After you log in, you'll be taken to the homepage of the tool.

To update your profile after loggin in, select the "Your Profile" link in the top right corner:
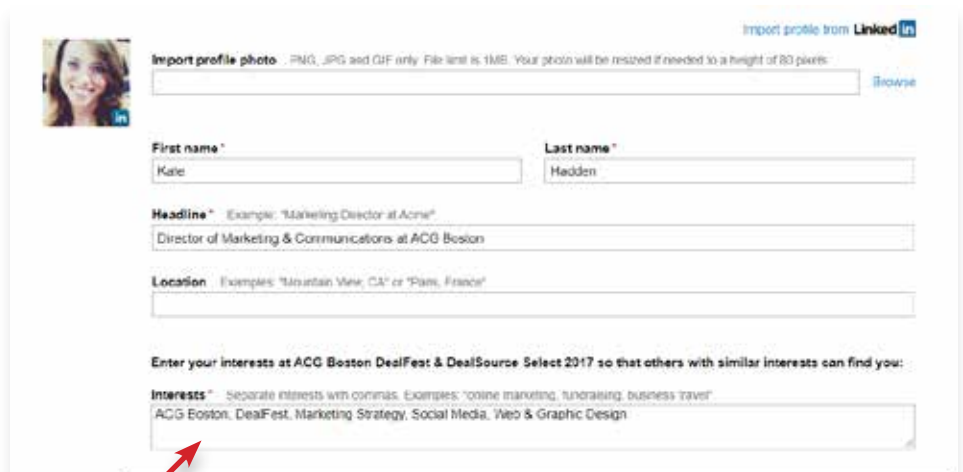

Then, click on the "Edit Your Profile" button.

You can include as much or as little information as you like in your profile, however the more information you place under "Interests," the easier it will be for other participants to find you based on mutual interests:

When you have finished updating your profile, click "Save" at the bottom of the page.

PEOPLE (ATTENDEE DIRECTORY)

The "People" section of the tool is the Attendee Directory, where you can browse who is attending the event and who is available for meeting requests.
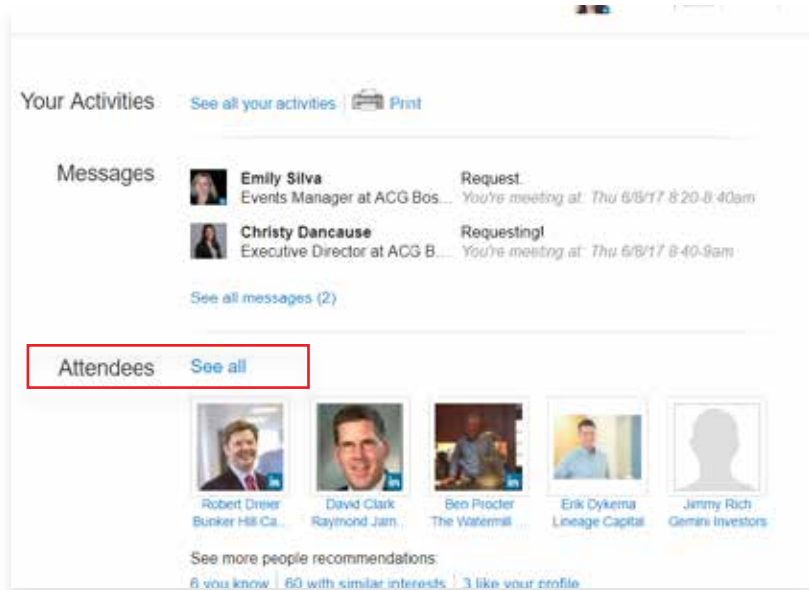
In the left sidebar, there are options for sorting and viewing the attendees. Once all registrants are in the tool, you'll also be able to sort by primary function -- capital provider, intermediary, corporate development etc.
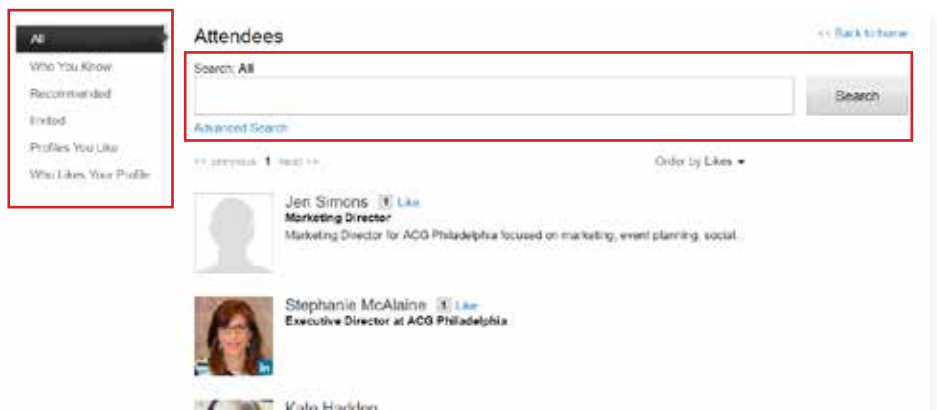
You can also perform a simple Search by keyword, or Advanced search that includes companies, locations, titles, interests, etc.

"Who You Know" in the left sidebar shows you your connections from LinkedIn who are also attending the event (if you have imported your profile from LinkedIn).

"Recommended" shows you attendees you might want to meet with based on similar interests.
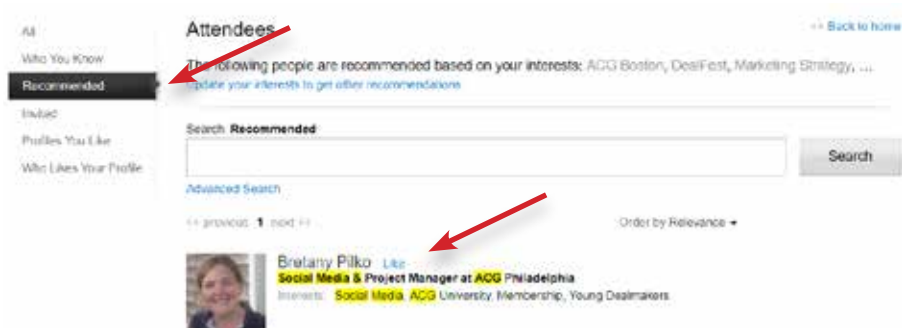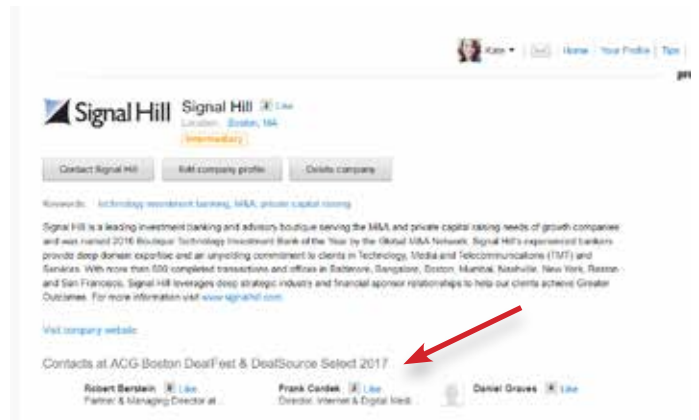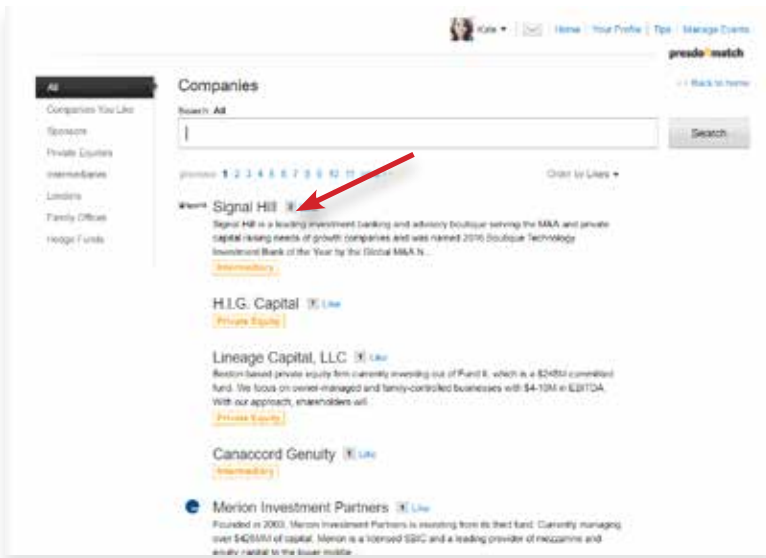
COMPANIES

The "Companies" section of the tool, accessible from the homepage, contains a list of the attendees' companies, and who from that company is registered for the event.
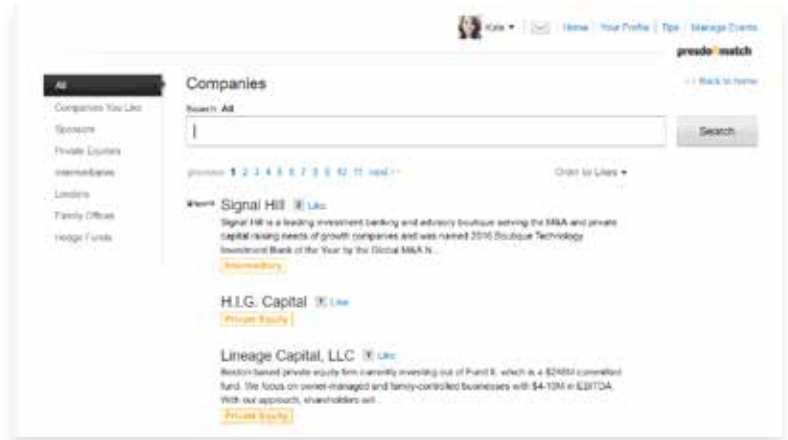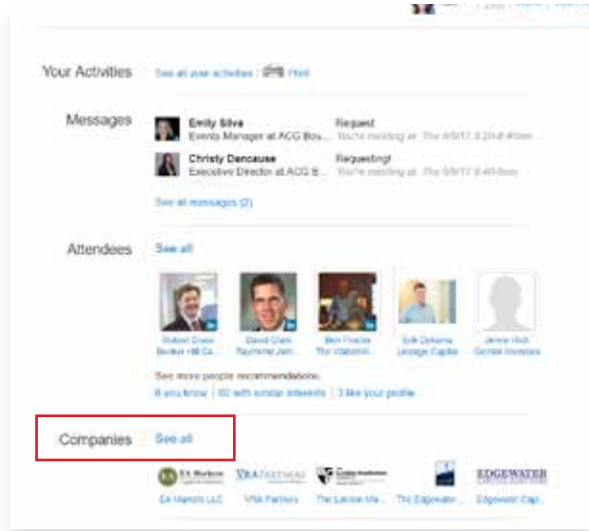
To see which people from the company are registered for the event, simply click on the company's name or logo.

AGENDA

The "Agenda" section of the tool, accessible from the homepage, is where you can select sessions you would like to attend.

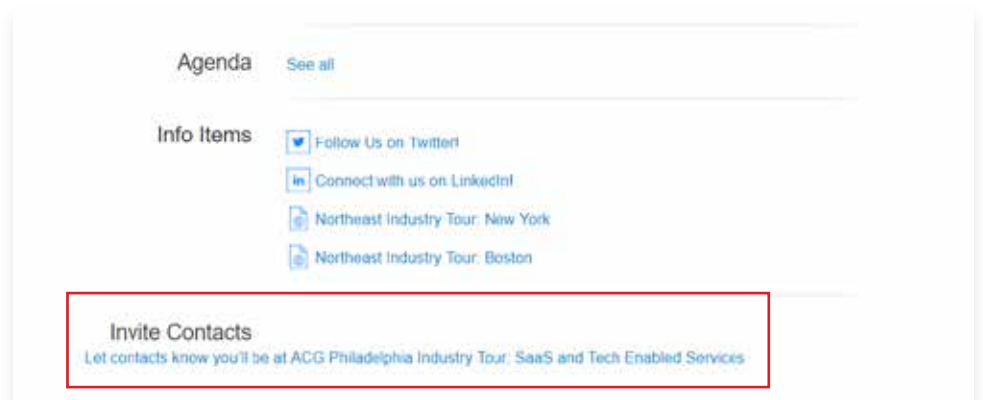Select which sessions you would like to attend.

Note that if you have selected to attend a session, no one will be able to make a meeting with you during that timeslot. It effectively blocks off that timeslot from your schedule.

INVITE YOUR CONTACTS

The "Invite Contacts" section of the tool, accessible via the homepage and also through the "People" section, allows you to invite your LinkedIn contacts to the event (if you have chosen to import your profile from LinkedIn).

Agenda — See all

Info Items
- Follow Us on Twitter!
- Connect with us on LinkedIn!
- Northeast Industry Tour: New York
- Northeast Industry Tour: Boston

Invite Contacts
Let contacts know you'll be at ACG Philadelphia Industry Tour: SaaS and Tech Enabled Services
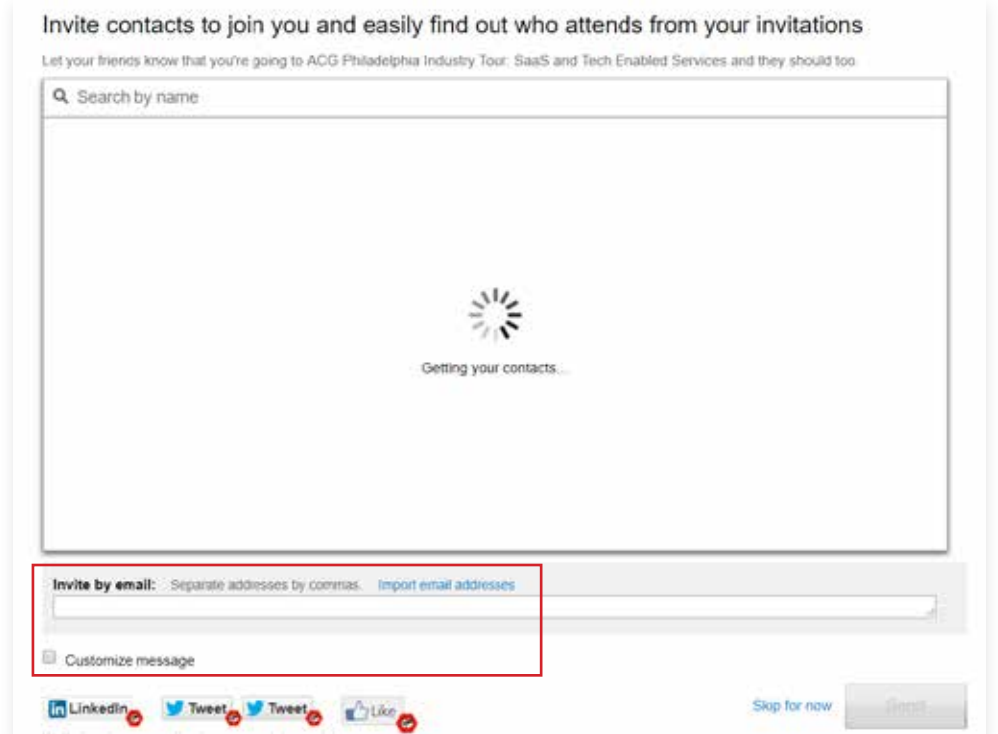
Select your contacts from LinkedIn that you would like to invite to the event.

You can also invite colleagues or peers by entering their email addresses individually.

Next, you can create your own message by selecting "Customize Message."

When you're finished, click "Send."

Invite contacts to join you and easily find out who attends from your invitations

Let your friends know that you're going to ACG Philadelphia Industry Tour: SaaS and Tech Enabled Services and they should too

Search by name

Getting your contacts...

Invite by email: Separate addresses by commas.   Import email addresses

Customize message

LinkedIn   Tweet   Tweet   Like

Skip for now   Send

HOW TO REQUEST A MEETING

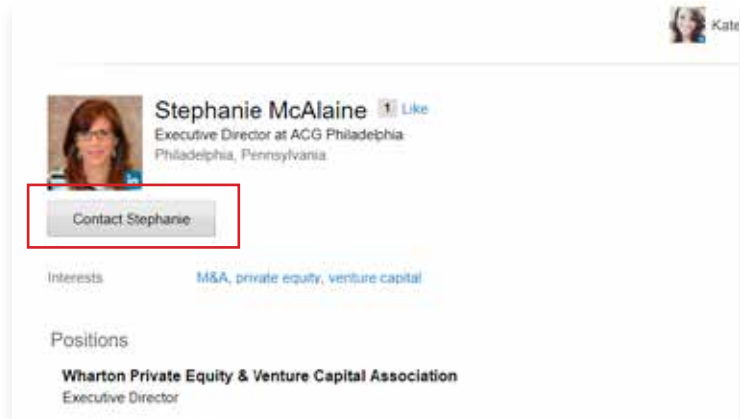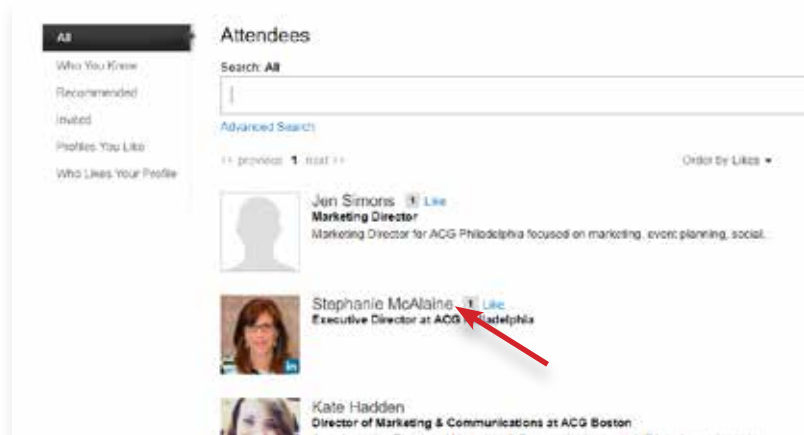When you are ready to begin requesting meetings with other attendees, return to the Attendee Directory by selecting "See All People" from the homepage.
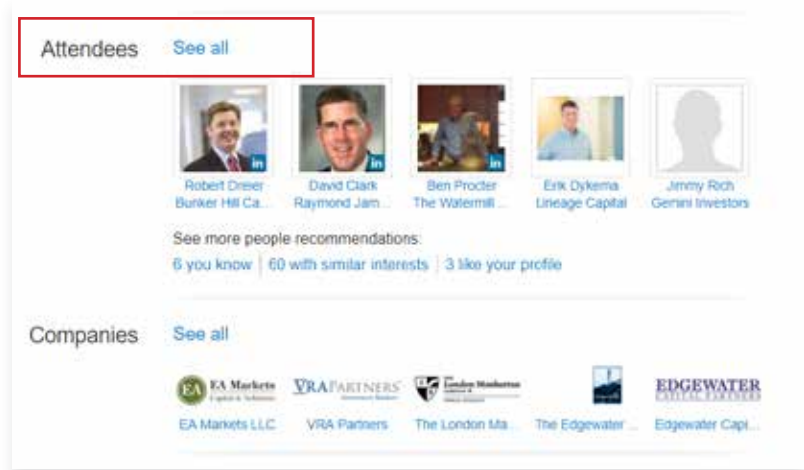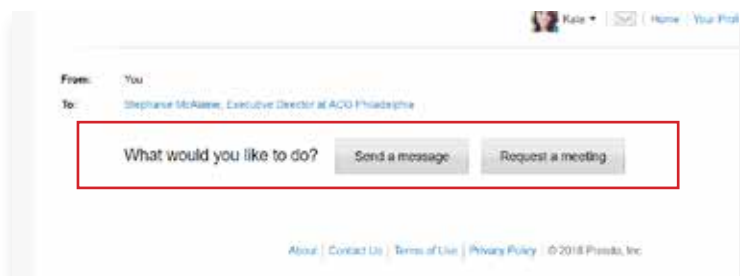

Select the individual you would like to meet with from the Attendee Directory by clicking on their name.

Then, once you are viewing their profile, choose "Contact [Name]."

Next, you will be asked if you would like to either "Send a Message" or "Request a Meeting."

HOW TO REQUEST A MEETING

If you click "Send a Message," a box will pop up for you to type in your message and then click "Send."

Note: this will send a message WITHOUT a meeting request.

To request a meeting, select "Request a Meeting," and a box will pop up asking you to select a meeting duration, and to include a message. When you are finished, click "Send."

The meeting request will be sent to your invitee through both the tool and to the email address with which they registered for the event.


Once your invitee receives the request, they will choose a mutually available time of day and the location for you to meet. You will be notified of this confirmation through the tool and to your email address with which you registered for the event.
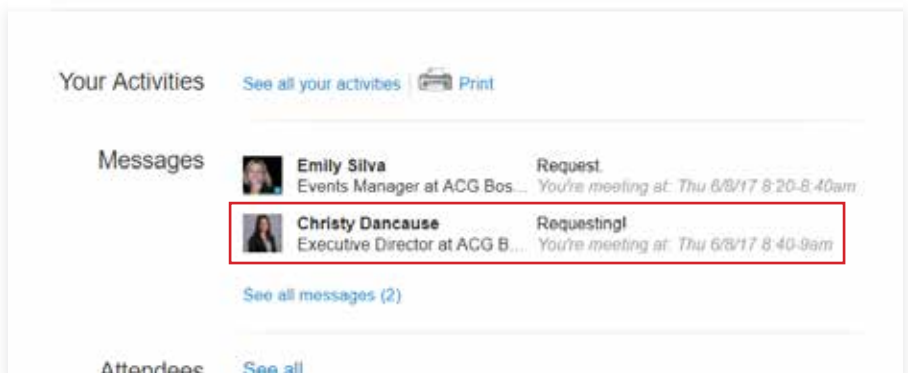
Please note that your invitee may also decline the request to meet.

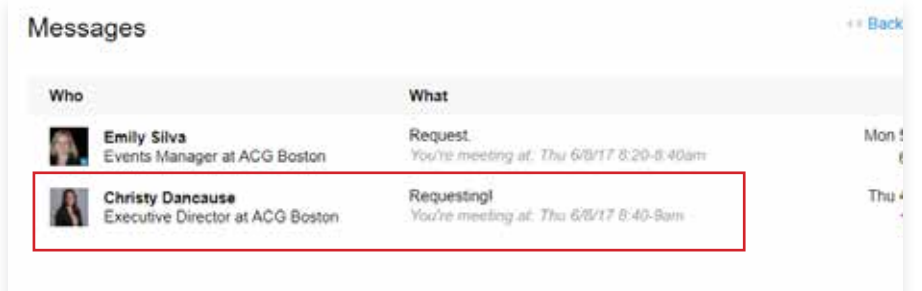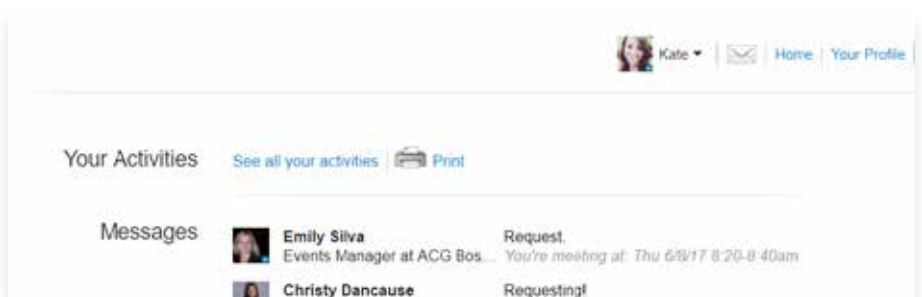# HOW TO REQUEST A MEETING

To see the status of your pending meeting requests, you can click on your invitee's profile and see it there...
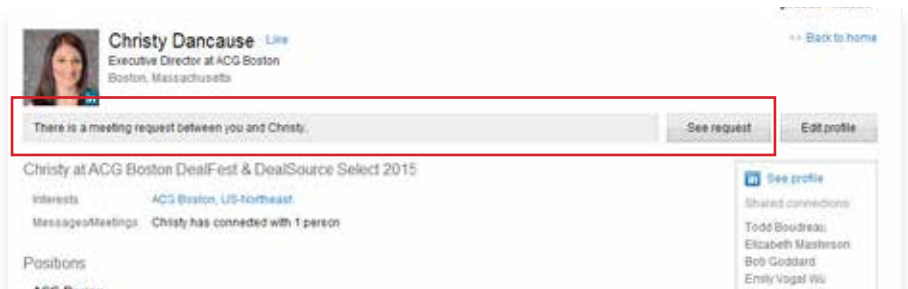
Or you can see it in the "Messages" section on the homepage...

Or in your Inbox, which can be accessed via the Envelope link in the top right corner of the tool.

RECEIVING & CONFIRMING MEETING REQUESTS

Other attendees of the event are also able to request meetings with you.

When someone has requested a meeting with you, you will receive a notification within the Messages section of the tool, and it will also be sent to the email address with which you registered for the event.

When you receive a request for a meeting, you will be able to confirm the meeting by selecting the time of day (only timeslots where you are BOTH mutually available will appear) and the location (only tables that are available during your selected timeslot will appear).

Once you've made those selections, you can confirm the meeting (with the option of sending a message along with the confirmation).

You also have the option of declining the request to meet all together.

VIEWING & PRINTING YOUR AGENDA

Once you've confirmed your meetings, you can view and print your agenda by selecting "See All Your Acitivites" or "Print" from the "Your Activities" section of the homepage.
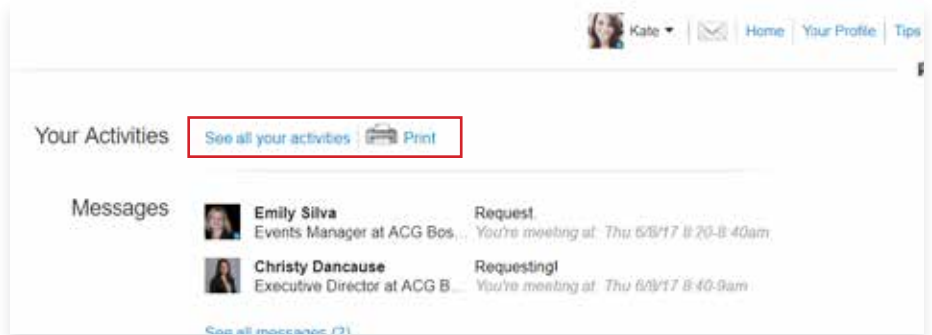
Clicking "See All Your Activities" brings you to this page.

Here, you can: select each of your meetings to view them, send messages to the participants, or cancel.

You can also select "Print" to have a hard copy of your meetings with you when you arrive onsite at the event.
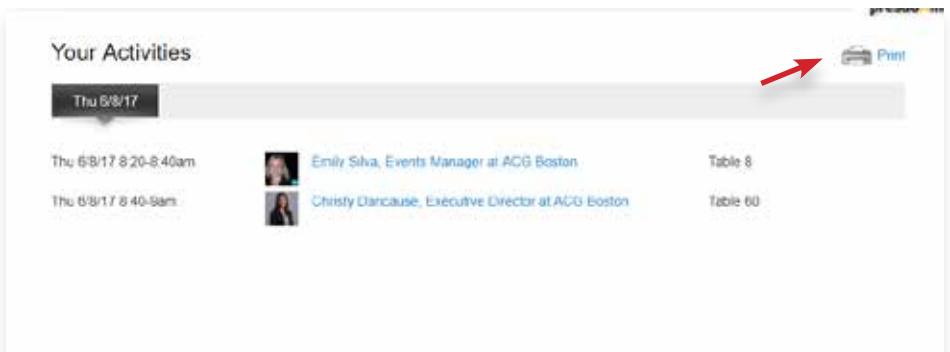
CANCELLING A MEETING

Should you need to cancel a meeting, you can do so by selecting the meeting you wish to cancel from the "Your Activities" section on the homepage...
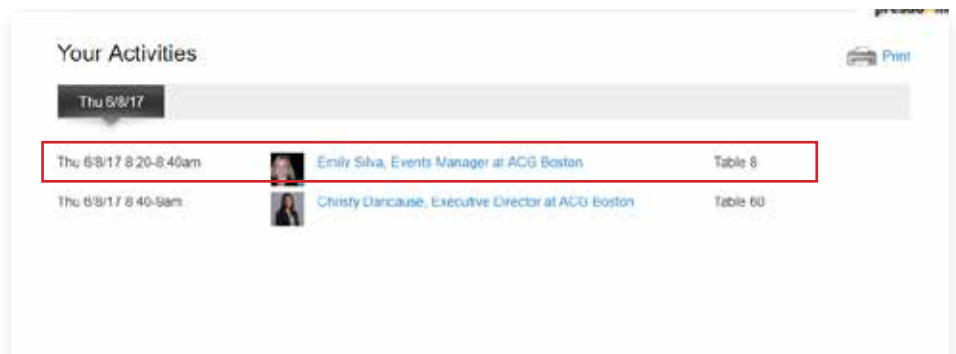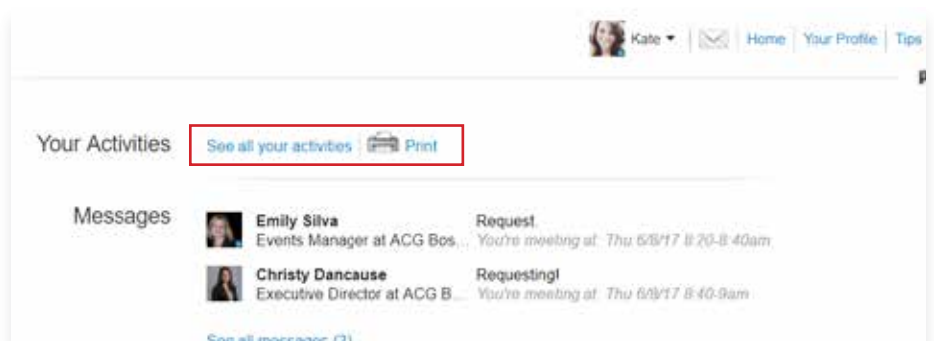
And then click the "Cancel meeting" link.

You'll be asked to compose a brief message to send along with the cancellation.

When you are finished, select the "Cancel Meeting" button.

QUESTIONS & HELP

Is there an app version of this tool?

Yes. There will be an app available to download in the App Store and Google Play. You can do all of the same things in the app (scheduling meetings, view your agenda, send messages, view profiles etc.) as you can in the online version.

Can I schedule meetings with anyone I find in the tool?

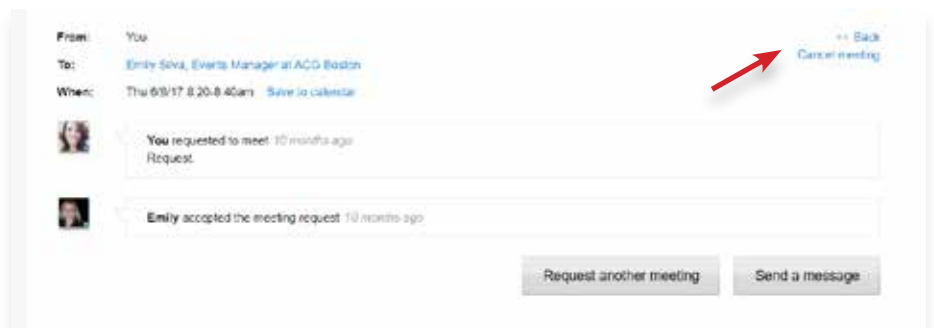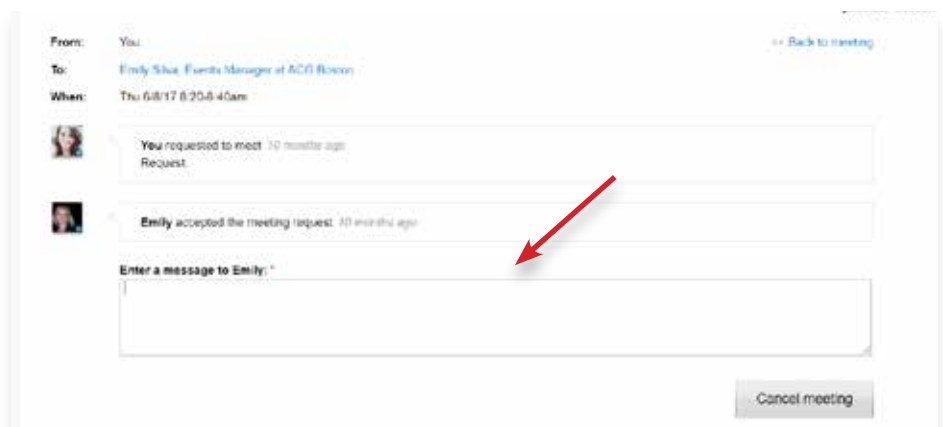Yes. There are no limitations on who you can schedule meetings with, or who can schedule meetings with you.

Do I need to have all my meetings at the same table during the event?

No. This tool allows you to select where (i.e., which Table) and when you want to meet during the event, so you are not relegated to stay at the same table the whole time.

Can I use my assistant's (or any other individual's) email address to log in or in my profile?

The tool's login and profile creation are tied to your email address that you used to register for the event, so you must use that to log in and schedule meetings. You can have your assistant (or other individual) login AS you, by sharing your login information, if you choose.

Can I have any of my messages from the tool cc'd to any other individual within my company (such as an assistant or colleague)?

The tool's functionality does not allow for cc'ing other individuals on messages that you receive. The best solution would be to forward the messages to the individual you want to share them with.

Am I scheduling meetings for just myself (and not the others from my firm who are also attending the event)?

Yes, meetings are scheduled on an invididual basis (one-to-one) in the tool, but you're welcome to have your colleagues from your firm with you at the meetings you schedule -- provided they are also registered to attend the event.

Your colleagues are also welcome to schedule their own meetings apart from you or others in your firm who are attending the event (i.e., you do not have to all attend the same meetings at the same time). We recommend coordinating with your colleagues to make the most of your time at the event, however you choose to go about it.

Be sure to print out your schedule before you arrive onsite at the event.