Virtual vs. Pre-Event Planning

Before the dates of the virtual event, attendees and exhibitors can start making appointments with each other through the Service Centers.

During the virtual event, the functionality works the same as it does in the Service Centers. Attendees go to their profile to access the SmartMatch planner.

Attendees can also easily request an appointment with an exhibitor by clicking on the Appointment tab in the exhibitor’s booth to request an appointment with the exhibitor directly from their booth.

Screenshots in this overview are taken from the Service Centers.
EXHIBITORS

Exhibitors login into the Exhibitor Service Center (ESC) and navigate to the SmartMatch Meetings page.

Exhibitors do not have access to the SmartMatch Planner in the Virtual Environment. Only booth staff will be able to log into the Virtual Show and will be the ones managing their appointments.

The Profile Setup Tab

The Profile Setup tab pulls information from the Exhibitor’s registration record. The name listed is the Sales Contact for the company.

You can list any of the questions that the exhibitors answered in the sales form. We can also add a new question, such as the SmartMatch question to the profile setup.

The Time Blocks Tab

The Time Blocks tab allows the exhibitor the ability to manage when they are available to meet with attendees.

Each exhibitor gets four (4) appointments per time slot. If only two booth staff are available at a certain time, the exhibitor can mark off 2 appointments so that attendees know they are unavailable. Note: the green checkmark means NOT AVAILABLE.
Networking Setup Options

The Search Tab

The Search tab allows exhibitors to search for Attendees.

Attendees include regular attendees and speakers.

We can add or take away from the search options I have listed below. Options include:

- Attendee Name
- Attendee Company
- Attendee City
- Attendee State
- Attendee Country
- Any survey question that is listed on the registration forms

Click “Search” after entering the search criteria.
Click “List All” to display all attendees without completing a search.

The text at the top of the Search tab is yours to edit. I pulled this text from another show with a similar setup to yours.

![Search Tab](image)

Search Results

Now that the exhibitor has found some attendees to reach out to, they can learn a little more about them

![Search Results](image)
1. Click on the **Attendee’s name to open their profile**. The profile can include address block information, a direct email button, and answers to the profile questions.

2. The **Answer Match** column displays how many of the attendee’s responses to the SmartMatch question matched the exhibitor’s answers.

3. The exhibitor can request an appointment with the attendee by clicking on **Make Appointment**. A popup window will display with all available timeslots.

   - Simply select the time you would like to meet with the attendee
   - scroll down to the bottom of the popup window
   - Add a Note for the attendee
   - And click **Request Appointment**
4. If you don’t want to request an appointment, you can check the **Bookmark** checkbox to flag the attendee for later.

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**Appointments Tab**

The Appointments Tab is the main page that will help your exhibitors manage their appointments.

This tab will display:
- all appointments regardless of status; Pending, Approved, Cancelled, Declined, and Updated.
- Bookmarked attendees
- Attendees who bookmarked this exhibitor
- A pdf Itinerary
5. **To Accept or Decline an Appointment Request:**
   a. Click on the yellow “Pending” icon to open a popup window.
   b. Add a note if you wish.
   c. Confirm or Decline the appointment.

6. **To assign the appointment to the appropriate booth staff:**
   a. Click on Select Booth Staff link to open a popup window.
   b. Click Assign next to the staff member.
   c. Now the booth staff member will be listed under the Booth Staff column.
d. The **booth staff member will receive an email**, confirming that they have been assigned to an appointment. I do not have control over the formatting of this email.

![Email screenshot]

**PDF Itinerary**

The PDF itinerary is available on all pages of the SmartMatch Planner.

You can add text above and below the automated information.
ATTENDEES
The majority of the SmartMatch Planner is the same for attendees as it is for exhibitors. Attendees log into the Attendee Service Center (ASC) and navigate to the SmartMatch Meetings page.

The Matches Tab
Attendees have an additional tab entitled, “Matches.” This tab lists all attendees and companies that answered the SmartMatch question the same way they did.

1. The **Recommend** View displays by default. This is a list of those that have at least one answer match with the attendee.

```
<table>
<thead>
<tr>
<th>Logo</th>
<th>Exhibitor Name</th>
<th>Answer Match</th>
<th>Make Appointment</th>
<th>Bookmark</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TestCompany1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image1.png" alt="image" /></td>
<td>TestCompany2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
|      |                                        |              |                 |         |```

2. The **Search** View allows the attendee to search like they do on the Search Tab.

```
Search for suppliers by their company name using the dropdown menu below.

Once you find the supplier you want to request an appointment with, click on the little calendar with the “?” to the right of their name.

<table>
<thead>
<tr>
<th>Search Questions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Company Name:</td>
<td></td>
</tr>
<tr>
<td>Primary Applications (Check all that apply)</td>
<td></td>
</tr>
<tr>
<td>Primary Responsibility</td>
<td></td>
</tr>
<tr>
<td>Primary Techniques/Areas of Interest</td>
<td></td>
</tr>
</tbody>
</table>

```
Networking Setup Options

Booth Staff
Since booth staff are an extension of the exhibiting company, they only see the Appointments tab when they log into the Attendee Service Center. They do not have the ability to search for attendees or companies themselves.

Attendee Search Tab
The Attendee Search tab offers three (3) options for searching for potential appointments; Attendees, Exhibitors, Session

1. **Attendees** – allows the attendee to search for other attendees, which includes speakers. The search options are the same for an exhibitor searching for an attendee.

2. **Exhibitors** – allows attendees to search for exhibiting companies. Search options include:
   a. Exhibitor Name
   b. Exhibitor City
   c. Exhibitor State
   d. Any question you would like to use as search criteria
Networking Setup Options

3. **Session** – allows attendees to search and find more information about the sessions. This is a good way for attendees to find the names of speakers they would like to connect with. Any session that is bookmarked will display on the attendee’s itinerary to help them plan their day.

   Search options include:
   a. **Session** – enter the name of the session
   b. **Description/Keyword** – enter a keyword to try to find a session the attendee is interested in
   c. **Session Pulldown** – lists all sessions offered on the day selected
   d. **Speaker Pulldown** – lists all speakers

   Once you find the supplier you want to request an appointment with, click on the little calendar with the “?” to the right of their name.

4. **Click on the name of the Session to open the session profile**

5. **Bookmark** the session by clicking on the bookmark checkbox. This will add the session to your bookmarked sessions on your Appointments Tab.
Networking Setup Options

Attendee Appointments Tab
The attendee’s version of the Appointments Tab is much the same as the exhibitors.

Attendee Profile Setup Tab
The attendee’s version of the profile setup tab is much the same as the exhibitor’s. The only difference is that it can list the questions that the attendee answered from the registration form, or add a question that is only used for the SmartMatch functionality.
Networking Setup Options

Attendee Time Blocks Tab

The attendee’s version of the Time Blocks tab is much the same as the exhibitor’s. The only difference is that an attendee will only have one slot available per timeslot.

<table>
<thead>
<tr>
<th>Block</th>
<th>Start Time</th>
<th>End Time</th>
<th>APT</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>08:00 AM</td>
<td>08:15 AM</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>08:15 AM</td>
<td>08:30 AM</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>08:30 AM</td>
<td>08:45 AM</td>
<td></td>
</tr>
</tbody>
</table>