Meeting Diary App

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The Meeting Diary App is used by both Exhibitors and Attendees to review their meeting schedules, request additional appointments, and print out their schedules.

Setting up the Meeting Diary App

Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. **Read this article for more information.**

Content

Sign In Page

- **Heading** – Enter a page heading here.
- **Content** – Enter any text to appear on the Sign In Page in the HTML editor.

Home Page

- **Navigation** — Enter the text to appear on the button in the Navigation bar.
- **Heading** – Enter a page heading here.
- **Content** – Enter any text to appear on the Home Page in the HTML editor.

Exclusions Page

Exclusions let attendees or exhibitors choose specific criteria about potential meetings and exclude them from the meeting matching process. This feature has the following options:

- **Navigation** — Enter the text to appear on the button in the Navigation bar.
- **Heading** – Enter your desired page heading here.
- **Exhibitor or Attendee Exclusion Instructions** – Enter any instructions to appear on the page in the HTML editor.
- **Enable Exhibitor Country Exclusions** – Enable to allow exhibitors to exclude preferences based on country.
- **Number of Exclusions** – Maximum number of exclusions an exhibitor can have for this field.
- **Note Type to Store Exclusions** – Specify the note to store the exclusion information on the exhibitors

record.

- **Enable Exhibitor Contact Tag Custom Field Exclusions** — Enable to exclude exhibitor preferences based off custom field of type tag.
- **Custom Field** – Specify the custom contact field to exclude preferences by.
- **Enable Attendee Marketing Tag Exclusion** – Enable to exclude exhibitor preferences based off Marketing Tag of type tag.
- **Marketing Tag** – Specify the marketing tag to exclude preferences by.

Meeting Diary Page

These are the settings used to manage the content on the Meeting Diary Page, which shows the schedule of meetings for each attendee or exhibitor:

- **Navigation** — Enter the text to appear on the button in the Navigation bar.
- **Heading** — Enter a page heading here.
- **Content** — Enter any instructions or information in the HTML Editor.
- **Set Meeting Diary to Read Only after** — Set the date and time here, after which attendees and exhibitors will no longer be able to make any changes to their schedule. If you do not set this to a future date, then Attendees and Exhibitors will not see the **Request Meeting** tab and buttons in the portal.
- **Allow available meeting times to be blocked** — Checking this box will allow exhibitors and attendees to block out times where meetings cannot be scheduled.
- **Allow to block meeting times until** – Allows you to specify a time and date that attendees will no longer be able to block meetings.
- **Allow Pre-Scheduled meetings to be cancelled** — Checking this box will allow exhibitors and attendees to cancel meetings that were pre-scheduled.
- **Show Alternate Times when Confirming Meeting Request** — Checking this box will display additional open time slots that can be requested.
- **Attendee Print** — Choose the Report to display the Attendee meeting schedule.
- **Exhibitor Print** — Choose the Report to display the Exhibitor meeting schedule.

Request Meeting Page

This is the page where attendees and exhibitors can request meetings with other people.

- **Navigation** — Enter the text to appear on the button in the Navigation bar.
- **Heading** — Enter your desired page heading here.
- **Content** — Enter any instructions or information in the HTML Editor.
- **Filter Heading & Instructions** – this will appear on the Request Meeting tab.
- **Results Heading & Instructions** – this will appear on the Request Meeting tab.
- **Meeting Request Heading & Content** – users will see this when requesting a new meeting.
- **Accept Meeting Heading & Content** – users will see this when accepting a new meeting request from another person.

- **Decline Meeting Heading & Content** – users will see this when declining a meeting request from another person.
- **Cancel Request Heading & Content** – users will see this when requesting cancellation of an existing meeting.
- **Cancel Meeting Heading & Content** – users will see this when canceling an existing meeting.
- **Attendee Info Merge Doc** – when viewing Info about an Attendee, this Merge Doc will be used.
- **Exhibitor Info Merge Doc** – when viewing Info about an Exhibitor, this Merge Doc will be used.
- **Show Photo/Logo** – should the person's photo be displayed with their Info?

> **Note**: Exhibitors do not show the Contact's Photo, but instead show the Company Logo from the Exhibition entry. This is an optional field that can be turned on in Exhibition Preference Setup.

- **Combine Exhibitor and Co-Exhibitor** – Merge Co-Exhibitor with their exhibitor, for easy viewing.
- **Show Stand Number** – should the Exhibitor's stand/booth number be displayed?

Missed Meetings Page

Often an Exhibitor or Attendee will receive more requests for meetings than can be accommodated in the number of timeslots. This page shows these unhandled requests, so Exhibitors may contact these Attendees after the event.

- **Navigation** — Enter the text to appear on the button in the Navigation bar.
- **Heading** — You can change the default text here.
- **Content** — Enter any instructions or information in the HTML Editor.

Attendee Search

The following settings let you configure the Exhibitor Search Page (this is where Exhibitors search for Attendees):

- **Tab** — Enter the text to appear on the Attendee Search Tab.
- **Show these Registration Types in Search Results** — Choose the registration types that you want to be available to search and display on this page.

> **Note**: If you forget to set this up, you'll get no Search Results, and see no Missed Meetings on the Missed Meetings tab.

- **Include Country** – Turning this on will display a country dropdown list in the search fields.
- **Country Label** — You can set the default text for the country dropdown list here.
- **Marketing Tags, Labels and Help Text** — You can select up to 10 Marketing Tags to appear in the Attendee Search fields, along with corresponding labels and help text.
- **Include Group Members in Result** – Results will include group members as options.

Exhibitor Search

The following settings let you configure the Exhibitor Search Page (this is where Attendees search for Exhibitors):

- **Tab** — Enter the text to appear on the Exhibitor Search Tab.
- **Show these Stand Types in Search Results** — Choose the Stand Types that you want to be available to search and display on this page.

> **Note:** If you forget to set this up, you'll get no Search Results, and see no Missed Meetings on the Missed Meetings tab.

- **Include Country** — Turning this on will display a country dropdown list in the search fields.
- **Country Label** — You can set the default text for the country dropdown list here.
- **Marketing Tags, Labels and Help Text** — You can select up to 10 Marketing Tags to appear in the Exhibitor Search fields, along with corresponding labels and help text.
- **Include Group Members in Result** – Results will include group members as options.

Additional Pages

You can define up to three additional pages along with Navigation buttons and content, to contain any necessary information for your visitors.

Using the Meeting Diary App

Sign In

Attendees or Exhibitors sign in by entering their email address and password. They will need to have cookies enabled in their browser.

Home

You can add any information here you'd like your Attendees/Exhibitors to read.

Meeting Diary

The Meeting Diary has a color-coded display of all meetings and meeting requests.

- **Blue** rows are empty timeslots. Each of these has a button to **Request Meeting**.
- **Green** rows are confirmed appointments.
- **Light green** rows are unanswered meeting requests.

Meetings, and Meeting Requests, have the following information:

- **Meeting Time**

- **Attendee Name or Exhibitor Name – the Information button gives more details.**
- **Diary** – If the Exhibitor has multiple people working on their booth, each one can have their own Diary.
- **Stand Number** – This will only display if enabled in the App Content setup for the Request Meeting page.
- **Request Type** – Attendee Request, Exhibitor Request, or Mutual Request. ("My Request" indicates a manual request by the logged in user.)
- **Pre-Scheduled Meeting** – this is a meeting generated automatically by the Meeting Matching Express Action, not a manual request.

Empty Timeslots (blue) gives the user the following buttons:

- **Request Meeting** – Send a Request for a meeting with another person. This uses the same interface as the Request Meeting tab (below).
- **Cancel Request** – Cancel a pending Request.
- **Accept Meeting** – Review the Request details, then enter an optional message for the requesting person, and press Accept Meeting. The message will be emailed to the other person.
- **Decline Meeting** – Review the Request details, then enter an optional message for the requesting person, and press Decline Meeting. The message will be emailed to the other person.
- **Cancel Meeting** – Cancel a confirmed meeting. (Pre-Scheduled Appointments can only be canceled here if that option is enabled in the App Content options for the Meeting Diary Page.)

Request Meeting

Filter

Attendees/Exhibitors can search for people to meet with by using the Filter. The following options are available:

- Search – Entering any part of the person's name or organization will show all matching records.
- Country – A pre-populated list of every country currently in the event.
- Status – If 'only show people with meeting times available' is ticked, it'll hide people with no free matching timeslots.
- Time Slot – Search for a particular slot, or "All" for any timeslot.
- Order – Results can be ordered by Organization, ID, or Last Name.

Pressing **Search** will display results, and **Clear** will wipe the Filter. To see *all* available people, users can leave the Search and Country fields empty, then press **Search**.

Result

This will show all people who match the search filter. More information about a person will be shown if users press the blue Information button next to their name. (It displays the Merge Document you've set up under **Attendee Info Merge Doc** or **Exhibitor Info Merge Doc** on the Request Meeting Page section of the App setup.)

The user can also see how many free timeslots each person has. They can then:

1. Choose a person, and press **Request Meeting**.
2. On the pop-up screen, enter a message for the other person.
3. Press **Request Meeting** to send the request. The other person will be alerted via email.

Missed Meetings

There will always be more Requests for meetings than can be given meeting appointments. Users can look under this tab to keep track of these requests:

- **Meetings Requested by Me** – shows requests that could not be filled.
- **Meetings Requested by Others** – shows other people's unfulfilled Requests to meet.

This information is also available on the Missed Meeting List, which is part of the **Exhibitor Meeting Documentation** report, and the Attendee **Meeting Documentation** report.