

Meeting Matching (in Express Actions)

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Meeting Matching is the technology in EventsAir to allow attendees and exhibitors to request appointments with each other. This Express Action is where you actually run the Meeting Matching technology to process all of the meeting preferences and requests that have been entered by attendees and/or exhibitors and create the diaries, or schedules of meetings for all of your attendees and exhibitors.

Running the Meeting Matching Express Action

When you have finished collected meeting preferences from your attendees and exhibitors (as applicable to your event), and you have reviewed all requests, you are ready to run this Express Action.

You can choose to run Meeting Matching across all contact records at the same time, or you may wish to run Meeting Matching in waves, against specific meeting schedules, registration categories or exhibitor categories.

Meeting Matching

Details

Selected Records

Target Group

0 Records Selected

Scheduled Meetings

☐ Delete ALL existing Scheduled Meetings before running

☐ Attempt to move meetings to another timeslot after initial matching process

Advanced Options

Mutual Preference Boost

0%

Exhibitor Preference Boost

0%

Attendee Preference Boost

0%

☐ Exclude Non-Mutual Exhibitor Preferences

☐ Exclude Non-Mutual Attendee Preferences

Start

Filter

Press the Filter button next to Target Group to select the group of people you want to work with. If you want everybody, simply hit Apply without entering any selections.

Note: only people who have entered Meeting Preferences will be found.

Scheduled Meetings Options

You have two options prior to running your Meeting Matching process:

- **Delete ALL existing Scheduled Meetings before running** - select this option **ONLY** if you wish to remove all existing matches and completely start from scratch.
- **Attempt to move meetings to another timeslot after initial matching process** - select this if you wish to retain all current matches, but wish to move them in order to accommodate new Platinum or Gold preferences.

Advanced Options

Within the advanced options you have the ability to boost Exhibitor, Attendee or Mutual preferences allowing you to adjust how the meeting matching process will assign meetings from the preferences made. If Attendee Preference Boost was higher than Exhibitor Preference Boost, the process would favor preferences made by attendees over those made by Exhibitors.

There are also options to exclude non-mutual preferences for both attendees and exhibitors so only attendees and exhibitors that have a mutual preference will be matched.

Selected Records Tab

After you use the filter to make your selection, you can view a complete list of Selected Records. You are able to use all selected records (by default) or select specific records that you want to include in Meeting Matching.

Save as Data Snapshot Option

Selecting the **Save as Data Snapshot** option lets you save the current set of Selected Records. You can then later re-use that Snapshot in a future filter operation. For example, if you made a set of changes to a specific selection of records, you can recall that same set of records in order to send an email communication, or run a report specific to the selection.

Note: **Save As Data Snapshot** saves the results, not the selection criteria. This means that any Attendees added *after* you made this selection are NOT included, even if they match your original selection.

If you want to save the *Selection Criteria* (instead of the *results*), simply use the **Save** button inside the Filter screen, instead of the **Save As Data Snapshot** button on the Selected Records screen.

Running the Process

Press **Start** to create meetings. You will see a progress thermometer at the bottom of the screen while the matching is underway. Once complete, a pop-up message will tell you how many meetings were created.

For Detailed Guides

- There is a document on this topic in [White Papers \(Detailed Guides\)](#)
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