

# Meeting Matching (in Express Actions)

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

[Read more about setting up Meeting Matching here.](#)


## Running the Meeting Matching Express Action

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

You can choose to run Meeting Matching across all contact records at the same time, or in waves based on 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, just click 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 want 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 want to keep all current matches, but would like to move them so you can accommodate any new Platinum or Gold preferences.

## Advanced Options

Here, you can boost Exhibitor, Attendee or Mutual preferences, to adjust how the meeting matching process will assign meetings. For example, if Attendee Preference Boost is higher than Exhibitor Preference Boost, the process will 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 those who both want to meet with each other (mutual preference) will be matched.

## Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
ID	NAME	ORGANIZATION	
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khan, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tenaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Blanco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Ma, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Costa, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Ma, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

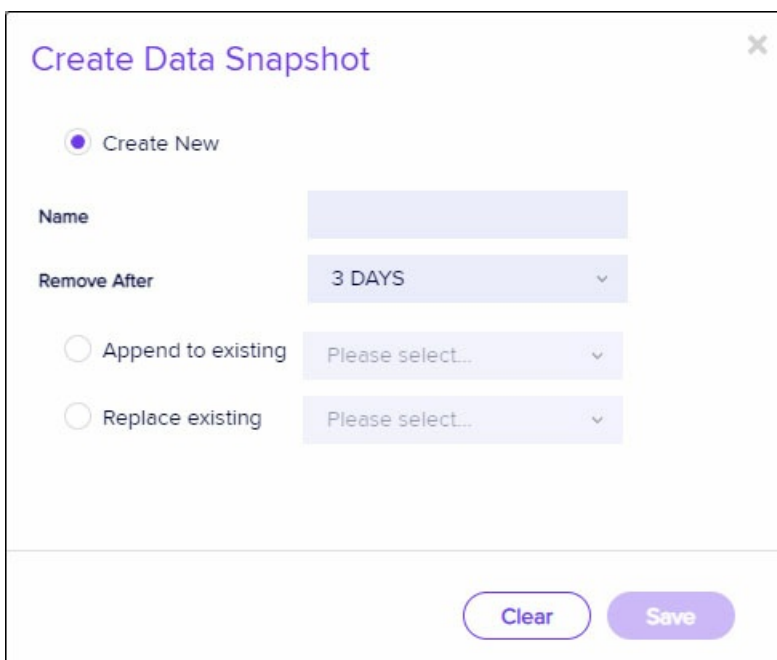
**Save as Data Snapshot**

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or “remembers” the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

**Note:** **Save As Data Snapshot** saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.



The screenshot shows a dialog box titled "Create Data Snapshot" with a close button (X) in the top right corner. The dialog contains the following elements:

- A radio button labeled "Create New" which is selected.
- A text input field labeled "Name".
- A dropdown menu labeled "Remove After" with "3 DAYS" selected.
- A radio button labeled "Append to existing" next to a dropdown menu showing "Please select...".
- A radio button labeled "Replace existing" next to a dropdown menu showing "Please select...".
- At the bottom, there are two buttons: "Clear" and "Save".

## 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.

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