Pre-Scheduled Meeting Preference App

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The Pre-Scheduled Meeting Preference App lets exhibitors and attendees set up preferences and requests for who they'll meet with.

When creating this app and other Meeting Matching settings, you should consider how Platinum and Gold Preferences are set up, as these will be given higher priority by the Meeting Matching technology when making appointments.

You'll also want to test all reports that you associate with the Preference Request page and the Marketing Tags you use to aid exhibitors and attendees in searching for the people they want to meet with.

Setting up the Pre-Scheduled Meeting Preference 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.**

Localization

Changing the wording in the app/portal

Changes made to the default language in Application Settings will affect all events. However, you can still make unique local changes for each portal in each event in the Portal Setup. **Read more about Localization.**

Content

Sign In Page

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

Settings 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**

- **Heading**

- **Exhibitor or Attendee Exclusion Instructions**

- **Enable Exhibitor Country Exclusions**

  - Number of Exclusions

  - Note Type to Store Exclusions

- **Enable Exhibitor Contact Tage Custom Field Exclusions**

  - Custom Field

  - Number of Exclusions

  - Note Type to Store Exclusions

- **Enable Attendee Marketing Tag Exclusion**

  - Marketing Tag

  - Number of Exclusions

  - Note Type to Store Exclusions

Preferences Page

These are the settings used to manage the content on the Preferences page:

- **Navigation** — Enter the text to appear on the button in the Navigation bar.

- **Filter Heading** — You can change the default text here.

- **Filter Instructions** — Enter any instructions in the HTML Editor.

- **Results Heading** — You can change the default text here.

- **Results Instructions** — Enter any instructions in the HTML Editor.

- **Add to Platinum Preferences button label** — You can change the default text here.

- **Add to Gold Preferences button label** — You can change the default text here.

- **Add to Standard Preferences button label** — You can change the default text here.

- **Attendee Info Merge Doc** — Choose the Merge Doc to display Attendee contact info.

- **Exhibitor Info Merge Doc** — Choose the Merge Doc to display Exhibitor contact info.

- **Show Photo/Logo** — This option will display the stored photo.

Note: For an Exhibitor, there is no contact photo – instead, the Company Logo from the Exhibition entry

can be displayed. This is an optional field that can be turned on in Exhibition Preference Setup.

- **Combine Exhibitor and Co-exhibitor** - show co-exhibitors together with the main exhibitor.
- **Show Stand Number** - This option will display the Stand Number.
- **Attendee Print** — Choose the Report to display Attendee Preferences.
- **Exhibitor Print** — Choose the Report to display Exhibitor Preferences.
- **Current Preferences Label** — You can change the default text here.
- **Current Preferences Instructions** — Enter any instructions in the HTML Editor.
- **Platinum Preferences Label** — You can change the default text here.
- **Platinum Preferences Instructions** — Enter any instructions in the HTML Editor.
- **Platinum Preferences Counter Label** — You can change the default text here.
- **Gold Preferences Label** — You can change the default text here.
- **Gold Preferences Instructions** — Enter any instructions in the HTML Editor.
- **Gold Preferences Counter Label** — You can change the default text here.
- **Standard Preferences Label** — You can change the default text here.
- **Standard Preferences Instructions** — Enter any instructions in the HTML Editor.
- **Standard Preferences Counter Label** — You can change the default text here.

Exclusions Page

- Navigation
- Heading
- Exhibitor or Attendee Exclusion Instructions
- Percentage of preferences that can be removed
- Exclusion settings confirmation message
- Preferences removed based on others exclusions label
- Preferences removed based on your exclusion label
- Hide Exclusions Tab

Attendee Search

The following settings control the Attendee Search Page (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.
- **Include Country** — Turning this on will display a country drop-down list in the search fields.
- **Country Label** — You can set the default text for the country drop-down 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**

Exhibitor Search

The following settings control 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.
- **Include Country** — Turning this on will display a country drop-down list in the search fields.
- **Country Label** — You can set the default text for the country drop-down 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**

Additional Pages

Include up to 3 additional pages, with any information required by your Attendees. Enter the page Titles, Heading, and Content here.

Using the Pre-Scheduled Meeting Preference App

Sign In

The attendee or exhibitor enters their email address and password. They will need to have cookies enabled in their browser.

Home

The attendee or exhibitor can review any information or instructions you've added here.

Preferences

Filter

Attendees or exhibitors can find people they want to meet with by using the filter options below:

- Search – Enter any part of the person's name or organization to see all matching records.
- Country – Select from a pre-populated list of every country in this event.
- Order – Order results by Organization, ID, or Last Name.

Pressing **Search** shows results, and **Clear** wipes the Filter. To see *all* available people, users should leave the Search and Country fields empty, then press **Search**.

Result

Users can see all people who match their search filter here. To see more information about a person, they can

press the blue 🛈 Information button next to a name. (This will display the Merge Document set up under **Attendee Info Merge Doc** or **Exhibitor Info Merge Doc** on the Preferences page of the App setup.)

The user can now make selections, and add them to one of three lists:

- Standard Preferences
- Gold Preferences (if enabled)
- Platinum Preferences (if enabled)

There are three different ways to add people to a list of Preferences:

- Pressing the ➕ green button adds the person to Standard Preferences;
- Names can be dragged-and-dropped into a Preferences box;
- Clicking one (or more) of the checkboxes next to each name, then pressing one of the following selections will add the person to the selected preference:
    - Add to Standard Preferences
    - Add to Gold Preferences (if enabled)
    - Add to Platinum Preferences (if enabled)

> **Note:** As soon as a name is added, it's automatically saved – there is no need for a Save button.

Status

This area shows the number of preferences left in each category – Standard, Gold, and Platinum.

Current Preferences

This shows everyone the user has indicated they want to meet with. To remove a name from here, it can be either dragged-and-dropped back to the Result section, or the ❌ red "x" icon next to the name will remove it from that preference section.