

# Meeting Matching tools

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Meeting Matching is a feature of EventsAir that allows you, as the conference organizer, to help attendees and exhibitors to arrange meetings by pre-appointment. You can allow Attendees and Exhibitors to select preferences, from which meetings can be arranged in schedules based on preferences. They can also directly request meetings in EventsAir.

Meetings don't have to be in person – they can also take place virtually, via the Meeting Hub in the OnAIR portal, or in the Attendee App.

There are many different approaches you can take, so it's worth spending time designing the best meeting matching options for your attendees and/or exhibitors. You'll also want to explain and promote the benefits of the option you choose by communicating with your Attendees and Exhibitors about Meeting Matching.

There are several ways to offer Meeting Matching:

- **One-Way Attendee Option** — Attendees can request meetings with specific Exhibitors.
- **One-Way Exhibitor Option** — Exhibitors can request meetings with specific Attendees.
- **Two-Way Option** — Attendees and Exhibitors can both request meetings with each other.
- **Organizer-Managed Meetings** — Only the organizer can match attendees to exhibitors and schedule meetings. There are no preference requests.
- **Attendee-to-Attendee Meetings** — Attendees search for and request meetings with other attendees.

## Meeting Matching glossary

These definitions may be helpful:

- **Meeting Diary** — The list of confirmed appointments (meetings) for an attendee or exhibitor.
- **Meeting Preferences** — the contacts each Attendee or Exhibitor has chosen as the people they'd like to meet with.
- **Meeting Request** — both Attendees and Exhibitors may be given the option to request meetings.
- **Meeting Request Notification Email** — The automatically generated email sent to an exhibitor or attendee when another party requests to meet with them.
- **Meeting Request Response Site** — This automatically created website is where an attendee or exhibitor is directed to when responding to a meeting request. They can choose to accept or decline.
- **Meeting Schedule** — A daily timetable of available meeting timeslots. You can create multiple meeting schedules. For example, if you have Tuesday-only delegates, you can create a meeting schedule that only has timeslots on a Tuesday, and add this to the Tuesday-only registration type.
- **Meeting Type** — will be either:
  - Attendees with both Exhibitors and other attendees
  - Attendees with Exhibitors
  - Attendees with other Attendees
- **Preference Categories** — you can enable up to three categories of preferences. If enabled, certain preferences are more heavily weighted:
  - **Platinum** preferences — these are given top priority
  - **Gold** — these are given second level priority, after Platinum preferences have been allocated
  - **Standard** — this is the default preference (even if you don't enable Platinum or Gold preferences) and will be given the lowest priority of the three.
- **Tables** — For attendee-to-attendee meetings, you have the option to set aside a number of tables as locations. As a meeting is scheduled it will be automatically assigned to a table.

## MEETING MATCHING WORKFLOW

**Plan ahead** to establish the purpose and needs of your attendees/exhibitors for an optimal setup. Your process may vary, but the below outlines a typical scenario where both attendees and exhibitors can request meetings with each other in person.

**Create marketing tags** to assist searching, matching and preferences. [If you want to allow exclusions based on certain criteria, you should also set up Contact Custom Fields and a Note Type for meeting exclusion requests.]

**Setup Panel**>Marketing [*and/or Custom Fields / Notes*]

**Create appropriate Merge Docs for attendees (and exhibitors, if required) to display details** in Pre-Scheduled Meeting Preference App. **Communications Panel > Merge Docs**

**Enable Meeting Matching** in Registration Preferences. This makes the Meeting Schedules option appear. For Attendee meetings, add table details if needed, and set any other options you require.

**Setup Panel**>Registration>Preferences

Create Meeting Schedules (time slots)

[Setup Panel](#)>[Registration](#)>[Meeting Schedules](#)

Set up meeting options as needed in Registration types (for attendees) and Stand Types (for Exhibitors)

[Setup Panel](#)>[Registration](#)>*within each relevant registration type*

[Setup Panel](#)>[Exhibition](#)>*within each relevant stand type*

Create the necessary Apps (Pre-Scheduled Meeting Preference App, where people request meetings; and Meeting Diary App, where they can see and tweak their personal meeting diaries once they've become available). Be sure to set expiry/read-only dates correctly.

[Online Panel](#) > [App Store](#) > *both apps*

OPTIONAL: Ask attendees (and exhibitors, if required) to set their preferences and make meeting requests (using the Pre-Scheduled Meeting Preference App). Remind them of the closing date.

[Communications Panel](#) > *email/SMS your attendees and exhibitors as required*

Run the Meeting Matching Express Action to create everyone's meeting diaries (based on their preferences and your settings). Check the results and adjust manually if needed.

[Express Actions Panel](#) > [Meeting Matching](#)

OPTIONAL: Run necessary reports and make any changes required.

[Reporting Panel](#)

Invite your attendees and exhibitors to view their diaries in the Meeting Diary App. If you've allowed it, they can also block meetings and/or request more meetings.

[Communications Panel](#) > *email/SMS an auto login token for the Meeting Diary App as required*

## Plan ahead for successful Meeting Matching

Think about exactly what you want to achieve before setting up the system and communicating the details to your attendees and exhibitors. All of this will depend on what type of event you're organizing. You'll need to consider:

- Who can make Meeting Matching requests? Will this be driven only by attendees seeking meetings with Exhibitors, or will it be two-way, where Exhibitors can request meetings as well? And/or do you want attendees to request meetings with other attendees?
- You can only have ONE meeting schedule per registration type. Also, Attendees can only successfully meeting match with other attendees if they're connected to the same meeting schedule.
- What search criteria will people want to use (and therefore what custom fields/marketing tags will you need?) Region, type of business or product, area of special interest?

*TIP: Be careful using number fields, because filtering would require someone to type in the exact number. It may be better to use a range of numbers instead, e.g. "2-4", "4-6", "6-8".*

- 
- Do you want all attendees/exhibitors to be able to request meetings, or only those from specific registration categories? For example, exhibitors who opt for the top package may be allowed 3 days of meetings while others only have 2 days.
  - Will you offer Platinum or Gold preferences? Will some attendee and exhibitor categories have more Platinum or Gold preferences than others?
  - Will you let Exhibitors with additional booth personnel the option to have two or more diaries? For example, an exhibitor who reserves a larger booth may get two diaries (multiple schedules side-by-side) while regular exhibitors only get one diary.

## Set up Meeting Matching — step-by-step

Setting up features in the correct order helps you avoid problems later. Read through all the steps first so you understand the process and create the necessary notes, tags etc.

### Step 1: Create what you'll need for the next steps:

#### In Event Set up:

- **Country List** (if required, for searching and matching purposes)
- **Registration Types** (as many as needed, depending on how you plan to run Meeting Matching)
- **Stand Types** (if you're allowing Exhibitors to use Meeting Matching; again as many as needed)
- **Note Types, Marketing Tags, and/or Custom Fields** (for search purposes).

NOTE: You can create up to 10 marketing tags for attendees, and up to 10 for exhibitors, to be included in search filters.

#### In Communications:

- Merge Doc(s) — one for Attendees, one for Exhibitors if needed (with just the information you want displayed in the Pre-Scheduled Meeting Preference App).

#### In Reporting:

- Custom Reports (if needed — there are default reports you can also use)

In the OnAIR portal and the Attendee App:

Decide whether you want to enable the setting in the meeting hub under Exhibitions: “Enable ability to set No Show for Pre-Scheduled meetings”.

## Step 2: Enable Meeting Matching

- In the Setup Panel, select the Registration Module.
- Select Preferences.
- Tick the box to enable Meeting Matching.

The screenshot shows the 'Registration Preference Setup' interface. Under the 'Details' tab, the 'Meeting Matching' section is active. It includes several checkboxes and input fields:

- Enable Meeting Matching
- Enable Attendee to Attendee Meetings
- Number of Tables Available:
- Table Name:
- Description for Organizer Created Meeting:
- Record Attendee Pre-Scheduled Meeting Preferences
- Record Exhibitor Pre-Scheduled Meeting Preferences
- Block meetings that conflict with Functions
- Allow  minutes after flight arrival for first meeting
- Allow  minutes before flight departure for last meeting
- Enable Virtual Meetings
- Enable Walk Time Restriction
  - Allow  Appointments per day to exceed Maximum Walk Time
  - Maximum Walk Time:  seconds
  - Time to Walk 10 Meters:  seconds
- Send meeting request reminder email after  hours

At the bottom right, there are 'Clear' and 'Save' buttons.

## Step 2: (a) For Attendee-to-Attendee Meeting Matching

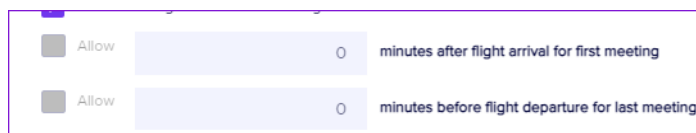
[Usually, this type of meeting occurs in an area with tables, rooms, or pods.]

- Check the box to **Enable Attendee to Attendee Meetings**.
- To create pre-assigned tables, enter the number of tables available. You can also enter a default name for the tables (such as location, pod, table, or whatever's appropriate).

## Step 3: Set up other meeting options in Registration module

Choose all options you require:

- Add a Description for Organizer Created Meeting
- Enable 'Record Attendee Pre-Scheduled Meeting Preferences' and/or 'Record Exhibitor Pre-Scheduled Meeting Preferences' if you want these options.
- You can also block meetings that conflict with functions and/or sessions.
- Consider travel arrival and departure times and set the correct options here.

A screenshot of a settings interface showing two rows of options. Each row has a checkbox labeled 'Allow', a text input field containing '0', and a label. The first row is labeled 'minutes after flight arrival for first meeting' and the second row is labeled 'minutes before flight departure for last meeting'.

|                          |       |   |  |
|--------------------------|-------|---|--|
| <input type="checkbox"/> | Allow | 0 | minutes after flight arrival for first meeting   |
| <input type="checkbox"/> | Allow | 0 | minutes before flight departure for last meeting |

- If needed, enable Virtual Meetings for your virtual or hybrid events.
- If needed, enable Walk Time Restrictions and settings.
- If needed, set reminder emails and automatic expiry for a meeting status.

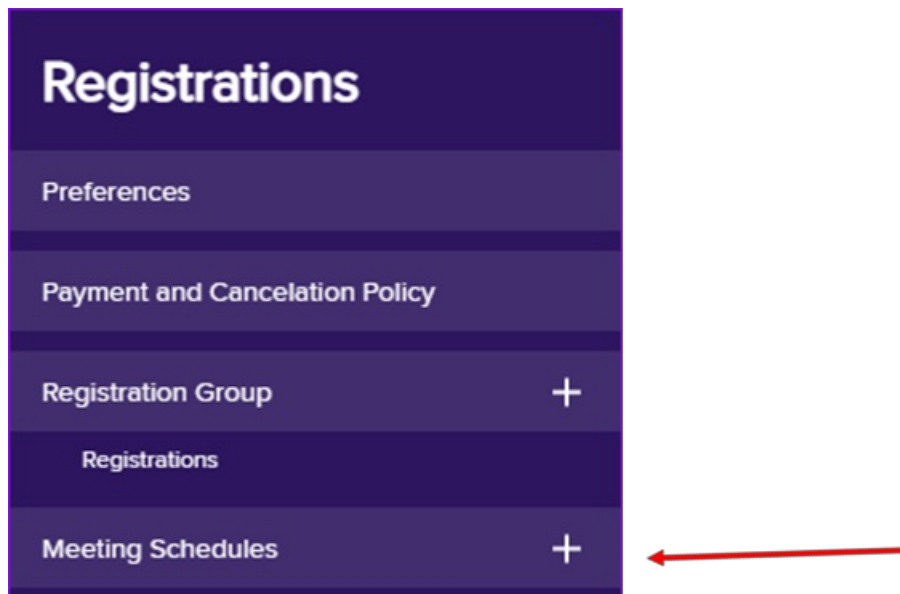
*TIP: Walk time matches meetings closer together first so attendees don't have to walk from one end of the floor to another.*

Configure the navigation button text, brands, and other settings for the notification email and for the Meeting Request Response Site.

At this point, **Save** your preferences.

You will now see **Meeting Schedules** appear in the Registrations module.

## Step 4 — Create your Meeting Schedule(s)



A Meeting Schedule is a list of empty timeslots, ready to be allocated as meeting times.

Each Registration Type (or Stand Type, for Exhibitors) is connected to a particular meeting schedule.

Use the + next to **Meeting Schedules** to create a schedule.

Start by giving this schedule a name, such as Attendee Networking Meeting Schedule.

**Note:** You may only need one Meeting Schedule, but more complicated events (such as where you have different categories of people attending on different days) may need more. For example, you might have a Meeting Schedule called "Monday-Wednesday", for anyone coming on Monday, Tuesday, and Wednesday. But if you also have a Registration Type that allows people to attend on only one day, you could create a matching Meeting Schedule called "Wednesday ONLY", that only has meeting slots on Wednesday.

However, only people who are connected to the same meeting schedule can be matched via the automatic process.

You can add time slots one at a time, or use Auto Create.

Using Auto Create is easiest. Select the Auto Create button and fill in:

- Start Date
- End Date
- Start Time
- Number of Meetings per day
- Meeting Duration in minutes

- You should also enable the 'Create Gap' option, then give the gap duration in minutes and give it a name (such as "Move to Next Appointment")

Another option is to use auto create for the morning times, then again for the afternoon.

Your meeting schedule will look something like the below. You have the option to delete or add individual time slots, add a lunch break etc:

| DATE       | START TIME | END TIME | NAME           | TYPE    |   |
|------------|------------|----------|----------------|---------|---|
| 31/10/2025 | 11:00 AM   | 11:10 AM | Meeting 1      | Meeting | ⊗ |
| 31/10/2025 | 11:10 AM   | 11:13 AM | 3-minute break | Gap     | ⊗ |
| 31/10/2025 | 11:13 AM   | 11:23 AM | Meeting 2      | Meeting | ⊗ |
| 31/10/2025 | 11:23 AM   | 11:26 AM | 3-minute break | Gap     | ⊗ |
| 31/10/2025 | 11:26 AM   | 11:36 AM | Meeting 3      | Meeting | ⊗ |
| 31/10/2025 | 11:36 AM   | 11:39 AM | 3-minute break | Gap     | ⊗ |
| 31/10/2025 | 11:39 AM   | 11:49 AM | Meeting 4      | Meeting | ⊗ |
| 31/10/2025 | 11:49 AM   | 11:52 AM | 3-minute break | Gap     | ⊗ |
| 31/10/2025 | 11:52 AM   | 12:02 PM | Meeting 5      | Meeting | ⊗ |
| 31/10/2025 | 12:02 PM   | 12:05 PM | 3-minute break | Gap     | ⊗ |
| 1/11/2025  | 11:00 AM   | 11:10 AM | Meeting 6      | Meeting | ⊗ |



If you choose to add a **Time Slot** manually, you need to fill in:

- Date
- Start Time
- End Time
- Type (of slot) i.e. Meeting, Gap, or Free Meeting . You use Gap for breaks, lunches, or time to move to the next appointment.
- Name of slot e.g. "Meeting 1, Garden Cafe"

You need to repeat this for all your time slots.

Whichever method you use, be careful not to create any overlapping time slots. (You can have 9am to 10am and also 10am to 11am; you can't have 9am to 9.45am and also 9.30am to 10am.)

## Step 5: Enable and set up Meeting Matching for the correct Registration type(s)

As mentioned, you may want only certain registration types to access meetings or particular features. Each Registration Type or Stand Type will be linked to a Meeting Schedule.

So, while still in the **Setup Panel, in Registrations**:

- Select an appropriate registration type and scroll down under the Details tab until you see the Meeting Matching options.
- Tick the **Enable Meeting Diary** box.
- Choose whether or not you want to enable **Sharing Meeting Diary** .
- Select the correct **Meeting Schedule** (based on what you created in the previous step).
- You have the option to limit Pre-Scheduled Meetings across the entire event schedule, set a daily limit, or do neither.
- You *must* set a maximum number for **Standard** Priority Pre-Scheduled Meeting Preferences, but setting a maximum for the other two categories (Platinum and Gold) is optional.

*NOTE: Platinum choices will get top priority; Gold gets second priority; and Standard is the default. If you leave Platinum or Gold at 0, these preferences aren't shown . It's a good idea for people to have more preferences than slots because not all preferences may be successful.*

- Select the appropriate **Meeting Type** for this registration category. This depends on your event and who'll be meeting with who:
  - Attendees with Exhibitors
  - Attendees with other Attendees
  - Both

### Registration Type Setup

Details
Payment Schedule
Cancellation Schedule
Advanced

**Meeting Matching**

Enable Meeting Diary

Sharing Meeting Diary

**Meeting Schedule\*** Attendee Networking Meeting Schedule

Limit Maximum Pre-Scheduled Meetings 0

Limit Maximum Pre-Scheduled Meetings Per Day 3

**Pre-Scheduled Meeting Preferences**

Maximum number of Standard 8

Maximum number of Platinum 0 Label Platinum

Maximum number of Gold 0 Label Gold

**Meeting Type\***

With Exhibitors

With Other Registered Attendees

Both

Delete
Save

- **Save** your settings.

## Step 5(a) — if Exhibitors are involved – enable Meeting Matching for Exhibition Stand Types

Again, depending on your planning, you may only want to give these options to some stand categories.

**Only confirmed exhibitor bookings will be visible to attendees requesting meetings.**

In the **Setup** panel, select the **Exhibition** module.

- Select an appropriate **Stand Type**.
- Scroll down to the **Meeting Matching** section of Details, and tick the box to **Enable Meeting Diary**.
- If there are co-exhibitors sharing the schedule, tick the box for **Co-Exhibitors Share Exhibitors Meeting Schedule**

- Select the correct **Meeting Schedule** (based on what you set up earlier).
- Select the **Default Number of Diaries** for this stand type. (Some stand types may have multiple staff available and would like more than one meeting diary for their stand.)
- You have the option to limit Pre-Scheduled Meetings across the entire schedule, OR limit them per day.
- As with Attendee meetings, you *must* set a maximum number for Standard Priority Pre-Scheduled Meeting Preferences, but setting a maximum for the other two categories (Platinum and Gold) is optional.

NOTE: This works the same way as it does for Attendee preferences, i.e. Platinum choices will get top priority; Gold gets second priority; and Standard is the default.

**Meeting Matching**

Enable Meeting Diary

Co-Exhibitors share Exhibitors Meeting Schedule

Meeting Schedule\* Attendee & Exhibitor Meetings

Default Number of Diaries\* 1

Limit Maximum Pre-Scheduled Meetings 20

Limit Maximum Pre-Scheduled Meetings Per Day 10

**Pre-Scheduled Meeting Preferences**

Maximum number of Standard 25

Maximum number of Platinum 2 Label Platinum

Maximum number of Gold 5 Label Gold

Delete
Save

## Step 6: Create the Pre-Scheduled Meeting Preference App

Using preferencing is optional. The **Pre-Scheduled Meeting Preference App** is where your attendees and exhibitors can request meetings they'd like to have with others. Platinum and Gold Preferences are given higher priority by the Meeting Matching technology when creating Meeting Diaries (scheduling meetings).

You should test the 'print' reports you've allowed on the Preference Request page, and make sure any Marketing Tags or Custom Fields you want attendees/exhibitors to use when searching will help them find the best meeting partners.

In the **Online Panel**, under **App Store**, find and install the **Pre-Scheduled Meeting Preference App**, and set the following options:

### Details Tab

Follow the same process for setting up any app in EventsAir: adding a name, alias, live dates, etc.

Set your Live Dates carefully, so that meeting preferences can't be requested after a certain date. Once everyone's put their requests in and you've closed the app, you'll be ready to run the Meeting Matching Express Action.

## Content Tab

### Content Tab – Sign In Page

- **Heading** — the default heading is “Sign in” but you can change it
- **Content** – Enter any text to appear on the Sign In page, using the HTML editor

### Content Tab – Home Page

- **Navigation** — default name of this menu tab, i.e. **Home** (you can edit this)
- **Heading** – enter your heading here
- **Content** – enter any text to appear on the home page in the HTML editor

### Content Tab – Settings Page

1. **Navigation** — default name of this menu tab, i.e. **Settings** (you can edit this — see below)
2. **Heading** – enter your heading here
3. **Exhibitor and Attendee Instructions** — add instructions to appear on the settings page.

It may be helpful to edit the menu navigation name of this page. You could call it something like “Search Settings”, or “Exclude from Search” and in the instructions, let people know that they can select things they want to **exclude** from their meeting match search. You can also let them how many exclusion filters are allowed.

See example below:



The screenshot shows a mobile interface for the Cyber Education International 15th Annual Summit in Sydney, Australia. It features a header with a logo of a brain with gears and the event title. Below the header, a welcome message reads 'Welcome Margaret Attendee'. A dark navigation bar contains a hamburger menu icon. The main content area asks, 'Would you like to exclude any industry sector(s) from your meeting preferences?' and states, 'You can exclude a maximum of 2 sectors below.' There are five checkboxes: 'Education Technology', 'Government', 'Post Secondary Education' (checked), 'Primary Education', and 'Secondary Education' (checked). A blue 'Save' button is at the bottom of the form.

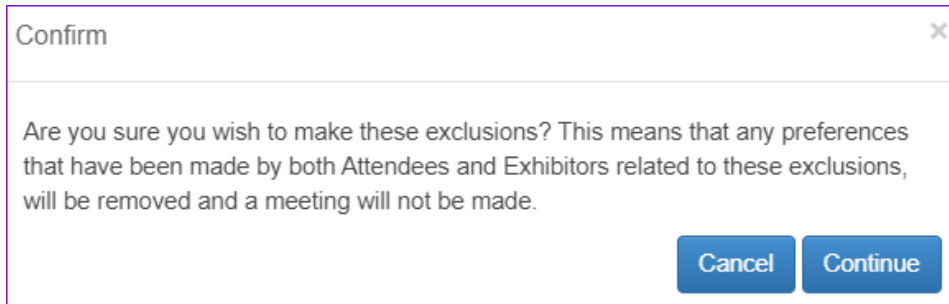
- **Enable Exhibitor Country Exclusions** — allows exhibitors to exclude meeting requests based on country (for example, if they don't own the rights to sell to a particular region)
- **Number of Exclusions** — how many exclusion filters an attendee or exhibitor is allowed.
- **Note Type to Store Exclusions** — the note type you'll use to store the exclusion preference (you need to have set this up earlier)
- **Enable Exhibitor Contact Tag Custom Field Exclusions** — if you like, you can allow exhibitors to exclude some attendees based on a contact custom field (such as industry sector)
- **Custom Field** — the custom field for the above exclusion (again, you'll need to set this up beforehand)
- **Enable Attendee Marketing Tag Exclusion** — you can allow attendees to exclude exhibitors based on a marketing tag
- **Marketing Tag** — the marketing tag that the above exclusions will be based on .

#### Content Tab – Exclusions Page

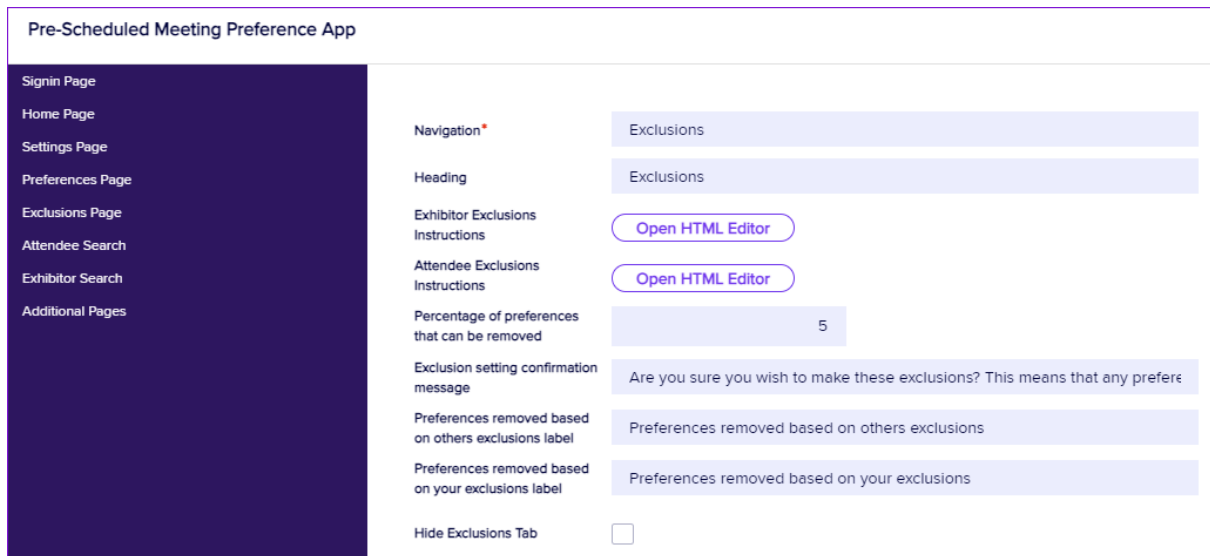
- **Navigation** — default name of this menu tab, i.e. **Exclusions** (you can edit this)
- **Heading** — you can change the heading here
- **Exhibitor and Attendee Exclusions Instructions** — use the HTML editor to add any extra instructions you want to appear on the Exclusions page.
- **Percentage of preferences that can be removed** — percentage of meeting preferences to be removed when

running meeting matching process.

- **Exclusion setting confirmation message** — you can change the default text [note, this text actually appears on the Settings page of the app.]



- **Preferences removed based on other exclusions label** — you can change the default text
- **Preferences removed based on your exclusions label** — you can change the default text
- **Hide Exclusions Tab** — Hides the Exclusions tab altogether



## Content Tab – Preferences Page

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

- **Navigation** — default name of this menu tab, i.e. **Preferences** (you can edit this)
- **Filter Heading** — you can change the default text
- **Filter Instructions** — enter any instructions in the HTML Editor

*NOTE: You can search for a matching surname but the app will NOT search by first name. For attendee networking, you may want to add that to your instructions.*

- **Results Heading** — you can change the default text
- **Results Instructions** — enter any instructions in the HTML Editor
- **Add to Platinum Preferences button label** — you can change the default text
- **Add to Gold Preferences button label** — you can change the default text
- **Add to Standard Preferences button label** — you can change the default text
- **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** — displays the stored image for Attendee/Exhibitor [You can enable the company logo display for Exhibitors, in the Set up panel under Exhibition>Preferences.]
- **Combine Exhibitor and Co-Exhibitor** — Combines preferences from exhibitors and co-exhibitors
- **Show Stand Number** — Displays exhibitor stand numbers
- **Show Tabbed Preferences** — Displays different preferences in a tabbed format in preferences page
- **Attendee Print and Exhibitor Print** — These options let you choose which Preferences Report an Attendee or Exhibitor can print from the app. You can also leave these blank. If you choose an option, a Print button will appear on the App.

NOTE: You can choose what Attendees and/or Exhibitors can print from the Pre-Scheduled Meeting Preferences app, depending on your needs. The App will print a personal version of the report (not the same version you'd see in the Reporting panel). Because the Meeting Matching action is done AFTER the Pre-scheduled Meeting Preferences App app closes, Meeting Diaries aren't yet available. Therefore, the recommended reports for this app are:

For "Attendee Print": **Attendee Meeting Preferences Selection List** — shows full details of all meeting preferences this attendee has requested.

For "Exhibitor Print": **Exhibitor Meeting Preferences Selection List** — full details of each meeting preference this exhibitor has requested.

For the below, you can change the default text that appears on the label, and you can enter extra instructions using the HTML Editor.

- **Current Preferences Label / Instructions**
- **Platinum Preferences Label / Instructions / Counter Label**
- **Gold Preferences Label / Instructions / Counter Label**
- **Standard Preferences Label / Instructions / Counter Label**

Content Tab – Attendee Search



You can set various options in the Attendee Search (where **Exhibitors or Attendees** can search for **Attendees**). :

- **Tab** — default name of this in the app, i.e. **Attendee** (you can edit this if you wish)

- **Show these Registration Types in Search Results** — choose the registration types that can be searched and displayed.

**You MUST set these up for the app to work properly.**

- **Include Country** — will display a country dropdown list in the search fields
- **Country Label** — default label is “Country” but you can change this
- **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. You can also leave these blank.

#### Content Tab – Exhibitor Search

You can set various options in the Exhibitor Search (where **Attendees** search for **Exhibitors**):

- **Tab** — default name of this in the app, i.e. **Exhibitor** (you can edit this if you wish)

- **Show these Stand Types in Search Results** — choose the Stand Types that can be searched and displayed  
**If allowing Exhibitor meetings, you MUST set these up for the app to work properly.**

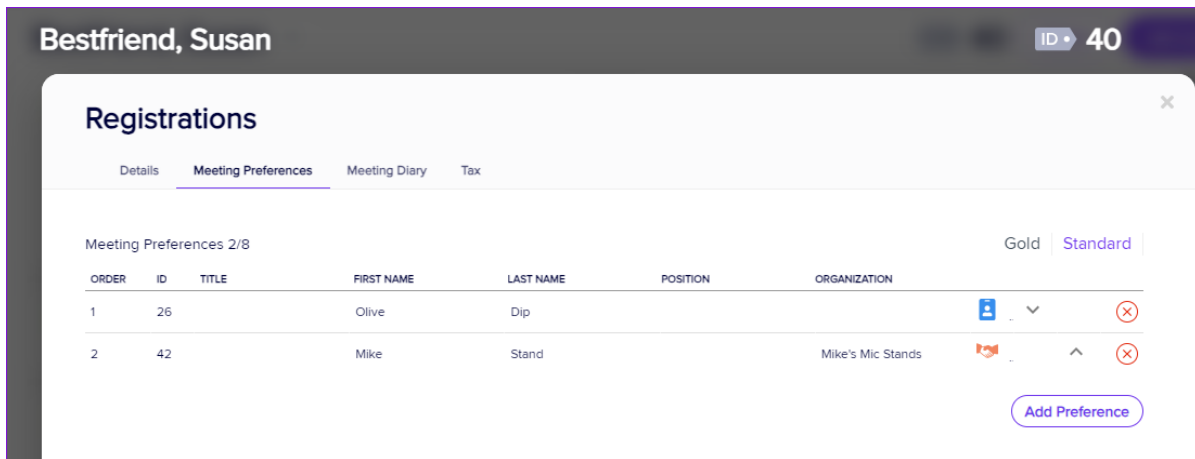
- **Include Country** — will display a country dropdown list in the search fields
- **Country Label** — you can set the default text for the country drop down list here
- **Marketing Tags, Labels and Help Text** — you can select up to 10 marketing tags to appear in the Exhibitor Search fields, along with corresponding labels and help text
- **Include Group Members in result** — Includes exhibitor group members in search results
- **Additional Pages** — this option lets you define up to three other pages for the app, along with Navigation buttons and content. For example, you could give details about the location and table set up for meetings.

## Step 7 — Invite Attendees (and Exhibitors, if relevant) to request meetings

After creating the Pre-Scheduled Meeting Preference App, let Attendees and Exhibitors know it’s available by sending them a link and telling them how to use the app and when the closing date for meeting preferences will be.

See also the “Information to send” section at the end of this article.

TIP: You can also see, add or change meeting preferences directly in a contact record, in the Registrations module (for Attendees) or the Exhibition Module (for Exhibitors). Look for the Meeting Preferences tab. Be sure to look at the top right to check Platinum, Gold, and/or Standard preferences. You'll also see an icon to show whether the meeting is with an attendee or an exhibitor.



## Step 8: Run the Meeting Matching Express Action

This Express Action is where ‘the magic happens’. All the meeting preferences and requests from your attendees and/or exhibitors are processed to create everyone’s meeting diaries (schedule everyone’s meetings) .

Running the Meeting Matching Express Action is what processes everyone’s meeting preferences and requests to create meetings.

This is why you wait until you’ve collected everyone’s preferences via the Pre-Scheduled Meeting Preferences App before running the Meeting Matching action.

You can run Meeting Matching across all contact records at the same time, OR run it in waves , only for specific meeting schedules, registration categories or exhibitor categories. (For example, you could match the exhibitor preferences first by filtering to exhibitors before running the process.)

You can also enter a percentage from 1% to 100% to give exhibitor, attendees, or mutual preferences a boost (which will influence the calculations being done behind the scenes).

The screenshot shows the 'Meeting Matching' configuration window. At the top, there are two tabs: 'Details' (selected) and 'Selected Records'. Below the tabs, the 'Target Group' section features a filter icon and the text '0 Records Selected'. The 'Scheduled Meetings' section contains two checkboxes: 'Delete ALL existing Scheduled Meetings before running' and 'Attempt to move meetings to another timeslot after initial matching process'. The 'Advanced Options' section includes three progress bars for 'Mutual Preference Boost', 'Exhibitor Preference Boost', and 'Attendee Preference Boost', all showing 0%. Below these are two more checkboxes: 'Exclude Non-Mutual Exhibitor Preferences' and 'Exclude Non-Mutual Attendee Preferences'. A 'Start' button is located at the bottom right of the window.

## Meeting Matching Options

These are the settings you'll see before running the Meeting Matching action:

**Target Group** (Filter symbol) — You need to start by selecting who you want matched. The default setting is 0 records. You need to click the filter icon and select “Apply” if you want to include all records with unmatched meeting preferences. You can also apply specific filters.

- **Delete ALL existing Scheduled Meetings before running** – select this ONLY if you want to remove all existing matches and start completely from scratch
- **Attempt to move meetings to another timeslot after initial matching process** – select this if you want to keep all current matches but will allow their times to be changed, to accommodate new Platinum or Gold preferences.
- **Exclude Non-Mutual Exhibitor Preferences** – select this if you only want people to be matched if BOTH of them have selected each other.
- **Exclude Non-Mutual Attendee Preferences** — as above, for attendee-to-attendee meetings.
- **Selected Records Tab** — Shows all records that will be included according to your settings. You can review and select individual records from the list if you only want those to be matched.

Once you're happy with your settings, select the **Start** button to run **Meeting Matching** and create meeting diaries for your attendees/exhibitors.

You'll 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.

If it doesn't complete successfully, you should check your settings to make sure you haven't missed anything.

For example, if you have Exhibitors who are also registered as attendees, and their other registration type has meetings enabled, Meeting Matching may fail, as they can only be matched on one basis.

### ***More about the "Selected Records – 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. For example, if you made a set of changes to a specific set of records, you can recall them later to send an email communication, or run a report on those records.

**Note:** **Save As Data Snapshot** saves the results, not the selection criteria. Any new contacts added *after* you ran the Data Snapshot are NOT included, even if they match your original search criteria.

If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button in the Filter screen.

## **Step 8(b) — RECOMMENDED – Run reports (check meeting diaries)**

It's recommended that you run one or more of these reports to check that your Meeting Diaries are ready for your attendees/exhibitors to review.

The Attendee reports are in the **Reports – Registrations** module; Exhibitor reports are in the **Reports – Exhibitions** module.

You can use these to check how many of your attendee and exhibitor preferences have been successfully matched, and if needed, run Meeting Matching again with some options boosted.

- **Attendee Meeting Summary List** — this report shows each attendee and a statistical breakdown of their requests, preferences, and scheduled appointments.
- **Attendee Meeting Schedule** — this report shows the full diary of meetings for a specific attendee. *This is a good report to use for the "Attendee Print" option in the Meeting Diary app. They'll see their own personal version.*
- **Attendee Free Appointment List** — Shows vacant meeting times. *You can use this as "Attendee Print 2" in the Meeting Diary App.*

You may also want to look at:

- **Attendee to Attendee Meeting Schedule (by Attendee)** – a detailed list of all attendee-to-attendee meetings.
- **Attendee to Attendee Meeting Schedule (by Table)** — as above, but listed by Table.

For Exhibitors:

- **Exhibitor Meeting Summary List** —shows each exhibitor and a statistical breakdown of their requests, preferences, and scheduled appointments.
- **Exhibitor Meeting Schedule** – shows the full diary of meetings. *This is a good report to use for the "Exhibitor*

*Print” option in the Meeting Diary App. They’ll see their own personal version.*

## Step 9: Create the Meeting Diary App



This is where your attendees/exhibitors can see and print their meeting diaries. They may also be able to request extra meetings and/or block requests, according to the “Read Only” dates settings you put in.

In the Online Panel, select Meeting Diary from the App Store and follow the usual steps to create an app and add necessary basic details in the Details tab. Now, review the following settings and edit if needed:

### Content Tab

#### Content Tab – Sign In Page

- **Heading** — you can edit this if needed
- **Content** — add any extra text in the HTML editor

#### Content Tab – Home Page

- **Navigation** — name of this tab in the app, i.e. Home
- **Heading** — you can add/change the heading here
- **Content** – enter any text to appear on the home page in the HTML editor

#### Content Tab – Exclusions Page

- **Navigation** — name of this tab in the app, i.e. Exclusions
- **Heading** – enter your heading here
- **Exhibitor and Attendee Exclusions Instructions** — add any extra instructions to appear on the exclusions pages for your attendees and exhibitors
- **Enable Exhibitor Country Exclusions** — this allows exhibitor to exclude meeting preferences based on country
- **Number of Exclusions** — number of exclusions allowed by attendee or exhibitor
- **Note Type to Store Exclusions** — which note you’ll use to store the exclusion preference
- **Enable Exhibitor Contact Tag Custom Field Exclusions** — option to exclude exhibitor preferences based on a contact custom field
- **Custom Field** — custom field to exclude options by
- **Enable Attendee Marketing Tag Exclusion** — option to exclude exhibitor preferences based on a marketing tag
- **Marketing Tag** — Marketing tag to exclude options by

## Content Tab — Meeting Diary Page

| Meeting Diary        |  |
|----------------------|--|
| Home Page            | Navigation* Meeting Diary  |
| Exclusions Page      | Heading Meeting Diary  |
| Meeting Diary Page   | Content <a href="#">Open HTML Editor</a>   |
| Request Meeting Page | Set Meeting Diary to Read Only after 23/09/2024 12:00 AM                                 |
| Missed Meetings Page | Allow available meeting times to be blocked <input type="checkbox"/>                     |
| Attendee Search      | Number of meetings that can be blocked per day 2   |
| Exhibitor Search     | Allow to block meeting times until 23/09/2024 12:00 AM                                   |
| Additional Pages     | Allow Pre-Scheduled meetings to be canceled <input checked="" type="checkbox"/>          |
|                      | Number of meetings that can be canceled per day 5  |
|                      | Allow meeting cancellation until 23/09/2024 12:00 AM                                     |
|                      | Show Alternate Times when Confirming Meeting Request <input checked="" type="checkbox"/> |
|                      | Attendee Print Attendee Meeting Schedule   |
|                      | Attendee Print 2 Attendee Free Appointment List  |
|                      | Attendee Print 2 Label Print available times   |
|                      | Exhibitor Print Exhibitor Meeting Schedule   |
|                      | Exhibitor Print 2 Exhibitor Meeting Schedule - Free Meeting List                         |

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** — default name of this tab in the app, i.e. Meeting Diary
- **Heading** — you can change the default heading here
- **Content** — add any instructions or information
- **Set Meeting Diary to Read Only after** — attendees and exhibitors can only make changes before this date.

The 'read only after' date is a key setting you'll want to let your attendees and exhibitors know about when you send them their link to the Meeting Diary app. See also 'Information to send' section.

- **Allow available meeting times to be blocked** — allows exhibitors and attendees to mark a meeting time as 'blocked out' times, when no meetings can be scheduled.
- **Number of meetings that can be blocked per day** — number of meetings from meeting diary that can be blocked per day.
- **Allow to block meeting times until** — set a final date for meetings to be blocked
- **Allow Pre-Scheduled meetings to be canceled** — allows exhibitors and attendees to cancel meetings that were pre-scheduled

- **Number of meetings that can be canceled per day** — set a maximum number here
- **Allow meeting cancellation until** — set the final date for meeting cancellations
- **Show Alternate Times when Confirming Meeting Request** — will display the person’s other available time slots when requesting a meeting
- **Attendee Print** — Choose the main printable Attendee meeting report (such as **Attendee Meeting Schedule**).
- **Attendee Print 2** — Choose a second report, if required (such as Attendee Free Appointment List)
- **Attendee Print 2 Label** — Label for Attendee Print 2 report (e.g. “Print available times”)
- **Exhibitor Print** — Choose the Report to display the Exhibitor meeting schedule
- **Exhibitor Print 2** — Choose a second report (such as Exhibitor Meeting Schedule — Free Meeting List)
- **Exhibitor Print 2 Label** — as for Attendee option

In the Meeting Diary app, it looks a bit like this:

The screenshot displays the 'Meeting Diary' interface. At the top, there are 'Print' and 'Print available times' buttons. The main content is organized by date, with sections for 'Friday Oct 31, 2025' and 'Saturday Nov 1, 2025'. Each meeting entry includes a time slot, a status (e.g., 'Available', 'Mutual Request', 'Exhibitor Request'), and a 'REQUEST MEETING' or 'CANCEL MEETING' button. Meeting 7 and Meeting 9 are highlighted in green, indicating they are pre-scheduled. Meeting 7 is for 'Mike's Mic Stands' and Meeting 9 is for 'Johnson Corporation'. Both have 'Diary 1' and a count (2 and 11 respectively). Meeting 7 also has a 'Mutual Request' label and Meeting 9 has an 'Exhibitor Request' label. At the bottom, there are 'Print' and 'Print available times' buttons.

### Content Tab — Meeting Request Page

This is the page an attendee or exhibitor sees if they select the “Request Meeting” button on the previous page (in

which case the time slot will also appear) OR if they use the “Request Meeting” menu tab (if so, they can search for a specific time slot).

- **Navigation** — edit the default name of the page (in menu) i.e. Request Meeting
- **Heading** — you can also change the default heading here
- **Content** — enter any instructions or information
- **Various headings & instructions** — unlikely to need changing
  - **Show Photo/Logo** — displays either exhibitor logos or attendee photos in diary (Exhibitor Company logos are visible if you’ve enabled this in Exhibitions module set up preferences).
  - **Combine Exhibitor and Co-exhibitor** — allows exhibitor and co-exhibitors to count as a single meeting
  - **Show Stand Number** — displays exhibitor stand number

So an exhibitor wanting to request more attendee meetings might see something like this:

### Request Meeting

#### Filter

Please use the filter options below to select your meeting preferences

**Attendee**

**Search**

**Country**

**Status**  Only show Attendees with Meeting Times Available

**Time Slot**

**Order**

#### Result

Please see below the results of your filter

| ID | Name                | Organization      | Status                 |
|----|---------------------|-------------------|------------------------|
| 39 | Margaret Attendee   | <a href="#">i</a> | No Availability        |
| 26 | Olive Dip           | <a href="#">i</a> | Meeting Already Booked |
| 32 | Major Teenage Drama | <a href="#">i</a> | Meeting Already Booked |
| 4  | Nancy Drew          | <a href="#">i</a> | No Availability        |
| 38 | Music Fan           | <a href="#">i</a> | No Availability        |
| 18 | Freddie Mercury     | <a href="#">i</a> | No Availability        |
| 6  | Sandy Oceans        | <a href="#">i</a> | No Availability        |



## Content Tab — Missed Meetings Page

This doesn't mean people not turning up to a meeting, but refers to preferences that were unable to be matched. Often an Exhibitor or Attendee will receive more preference (requests) for meetings than can be fit into available timeslots. This page shows these unhandled requests, to allow people to still make contact after the event, where appropriate.

You can edit the following settings:

- **Navigation** — default menu tab is Missed Meetings
- **Heading** — default page heading is Missed Meetings
- **Content** — enter any instructions or information

In the Meeting Diary app, it looks something like this:

The screenshot displays the Meeting Diary app interface for the Cyber Education International 15th Annual Summit in Sydney, Australia. The user is logged in as Alan Johnson. The navigation menu includes Home, Exclusions, Meeting Diary, Request Meeting, Missed Meetings, and Sign off. The Missed Meetings page is active, showing a list of meetings requested by the user and others. The page includes a Time Zone dropdown menu and two tables of meeting requests.

**Meetings Requested By Me**

| ID | Name              | Organization              | Status          |
|----|-------------------|---------------------------|-----------------|
| 38 | Music Fan         | 9 Meeting Times Available | REQUEST MEETING |
| 38 | Music Fan         | No Availability           |                 |
| 18 | Freddie Mercury   | 9 Meeting Times Available | REQUEST MEETING |
| 6  | Sandy Oceans      | No Availability           |                 |
| 18 | Freddie Mercury   | No Availability           |                 |
| 22 | Mary Poppins      | No Availability           |                 |
| 39 | Margaret Attendee | No Availability           |                 |
| 6  | Sandy Oceans      | No Availability           |                 |

**Meetings Requested By Others**

| ID | Name            | Organization              | Status          |
|----|-----------------|---------------------------|-----------------|
| 18 | Freddie Mercury | No Availability           |                 |
| 18 | Freddie Mercury | 9 Meeting Times Available | REQUEST MEETING |

## Content Tab — Attendee Search

These are your settings for Attendee search/filter (where Attendees or Exhibitors search for Attendees), shown on the Request Meeting Page:

- **Tab** — text that appears on the Exhibitor’s Search Tab [Default is “Attendee”]

- **Show these Registration Types in Search Results** — choose which Registration Types are able to be found via search.  
**You MUST set these up for the search and missed meetings features to work properly.**

- **Include Country** — tick to include a country dropdown list in the search fields
- **Country Label** — 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 search fields, along with corresponding labels and help text. (You’d probably use the same ones you used in the Pre-Scheduled Meeting Preferences App.)
- **Include Group Members in result** — will show group members in search results instead of group contact

#### Content Tab – Exhibitor Search

These are your settings for the Exhibitor search/filter (where Attendees search for Exhibitors):

- **Tab** — text that appears on the Attendee Search Tab [default is “Exhibitor”]

- - **Show these Stand Types in Search Results** — choose which Stand Types are able to be found via search  
**If you’re including Exhibitor meetings, you MUST set these up for the search and missed meetings features to work properly.**

- **Include Country** — tick to include a country dropdown list in the search fields
- **Country Label** — 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 search fields, along with corresponding labels and help text (again, probably the same ones you used in the Pre-Scheduled Meeting Preferences App).
- **Include Group Members in result** — will show group members in search results instead of group contact

#### Content Tab–Additional Pages

- You can add up to three extra pages with Navigation buttons and content

## Virtual, remote & hybrid event meetings

Meeting Matching works in both Live and Virtual modes at the same time, and uses the same process for both types of attendees. All attendees and exhibitors will see their pre-scheduled meetings appear on the OnAIR timeline.

If enabled in the Attendee App / OnAIR portal, attendees can indicate if an exhibitor was a no-show for their pre-scheduled meeting in virtual events.

**Note:** If an exhibitor has meeting requests but no team member has yet been assigned to them, when they log into OnAIR there'll be a note to tell them to assign (at least one) team member(s). If they have more than one team member, they need to assign virtual meetings manually. If they only have one person, that person will be automatically assigned all the meetings.

## Information to send Attendees / Exhibitors

*You'd send your attendees (and Exhibitors, if applicable) information along the lines of what's below.*

*Of course, if you change the names of pages or labels in your app, you should revise the below to suit.*

*You should also let them know the closing dates for preferences and changes :*

## Using the Pre-Scheduled Meeting Preference App

This app allows you to say who you'd like to meet with while at our event.

The app is easy to use, however some simple guidelines are below.

**Please note this app will only be available until [date]:**

### Sign In page

We'll send you an auto-login token that will automatically sign you in.

(If you have an attendee or exhibitor online account for this event, you may also be able to use that email/password combination.)

Trouble signing in? Make sure you have cookies enabled.

### Home

Check here for any extra information.

### Settings

You can exclude people from your search if your event organizer allows this.

### Preferences

### *Filter*

You can search for people you'd like to meet with:

- Search field: Enter a person's surname or organization to see all matching records.

Your event organizer may also allow you to narrow your search by country or other criteria.

- Order – See results listed by Organization, ID, or Last Name.

Press the **Search** button to see your results, or **Clear** to wipe the Filter.

To see *all* available people, leave fields blank, then press **Search**.

### ***Result***

See all people who match your search filter(s).

You can add someone to your:

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

Use the (i) icon for Information.

Use the + button to add someone as a Standard meeting preference.

- You can also drag and drop a name into a Preference box, or
- Click one (or more) of the checkboxes next to each name, then press:
  - Add to Standard Preferences
  - Add to Gold Preferences (if enabled)
  - Add to Platinum Preferences (if enabled)

### **Status**

See how many preferences you have left in each category.

### **Current Preferences**

This shows everyone you'd like to meet with.

To remove someone from the list, either Drag & Drop back to the Result section or press the red X button next to the name.

### **Exclusions**

This will indicate who's been excluded from your meeting preferences (based on either your criteria or theirs).

**Sign off** — use this page to sign out of the app.

# Using the Meeting Diary App

## Sign In

We'll send you an auto-login token that will automatically sign you in.

Please note this app will be 'read-only' after [date]:

(If you have an attendee or exhibitor online account for this event, you may also be able to use that email/password combination.)

Trouble signing in? Make sure you have cookies enabled.

## Home

Check here for any extra information.

## Meeting Diary

The Meeting Diary has a color-coded display of all your 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 (green) and Meeting Requests (light green) include:**

- **Meeting Time**
- **Attendee Name or Exhibitor Name** – Press the **Information** button for more details.
- **Diary** – if an Exhibitor has multiple people working on their booth, there can be more than Diary.
- **Stand Number (if enabled)**
- **Request Type** – Attendee Request, Exhibitor Request, or Mutual Request. (For requests you personally made, you'll see "My Request".)
- **Pre-Scheduled Meeting** — you've been matched based on either your or their preference, or your event organizer's request.

**Empty Timeslots (blue) include:**

- **Request Meeting** – Send a Request.
- **Cancel Request** – Change your mind? Cancel a pending Request here.
- **Accept Meeting** — Review the Request details, enter an optional message to be emailed to the other person, and press Accept Meeting.
- **Decline Meeting** – Review the Request details, enter an optional message, and press Decline Meeting.
- **Cancel Meeting** – Cancel a confirmed meeting (if this feature is enabled).

**Request Meeting options:**

## *Filter*

Find possible meeting matches by using the Filter.

- You can search for people you'd like to meet with:
- Search field: Enter a person's surname or organization to see all matching records.
- Your event organizer may also allow you to narrow your search by country or other criteria.
- Status – only show people with meeting times. Ticking this will hide people with no free matching timeslots.
- Order – See results listed by Organization, ID, or Last Name.
- Time Slot – pick a particular slot, or "All" for any timeslot.
- Order – Order your results by Organization, ID, or Last Name.

Press the **Search** button to see your results, or **Clear** to wipe the Filter.

To see *all* available people, leave fields blank, then press **Search**.

Press **Search** to see your results, or **Clear** to wipe the Filter. If you want to see *all* available people, leave the Search and Country fields empty, then press **Search**.

## *Result*

See all people who match your search filter here. Use the (i) icon for more information.

You will also see how many free timeslots each person has.

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

## **Missed Meetings**

There will usually be more Requests (Preferences) for meetings than can be given meeting appointments. Use this tab to keep track of these requests:

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