ACG San Francisco

ACG Access, the MeetMax scheduling tool, allows participants to see who's attending, request and confirm meetings, and connect with key dealmakers from across the country before and during the event.

INSTRUCTIONS

Logging In

1. Click the 'Login' button displayed at the bottom of the login email.
2. Personalized login information will auto-populate within the username and password fields.
3. Click 'Login.'

Profile & Demographics

- Once you log in, you will arrive on your Profile page.
- Make any changes to the information listed, upload a headshot and provide demographic responses (Target Deal Size, Industry Verticals). After updating, scroll down and select "Submit." The Profile information is a way to search and select who is a good fit for meetings. Filling this area out is important!

Requesting Meetings

- **Select "Meetings" on the dropdown menu and click "Request Meeting" to search & filter the attendee list**. Attendees are listed in alphabetical order by firm. To find participants with whom you would like to meet, use the filters and the search box to narrow down your audience. Check the boxes in the search filter to find users who match your criteria. To learn more about a user, click their name and a pop-up will display containing all information provided.
- **To request a meeting: find the individual** you would like to request a meeting with on the Attendee List, and **select Request**.
    - Select a preferred meeting time slot under duration.
    - Please note that you are able to select a time to meet upfront - **if the participant confirms your meeting request, they can keep the requested time selected or will view other times you are both mutually available**.
    - The individual who confirms the meeting will be able to **select the room, table or other location** for the meeting.
    - Once you have sent the invite, the status of that user will be Pending.
- To **Accept** a request, click **Received Requests,** select **Accept** to the right of the incoming request. A pop-up box will appear that will allow you to change the requested meeting time and select the meeting location. Please note only mutually available times will display.
    - **Select a time you are both free and click Submit**. The meeting will automatically be added to your calendars.

- **Decline a meeting request** if you do not want to schedule a meeting with someone who has requested one with you. Click the dropdown arrow to the right of **Accept** and select Decline. That request will be moved to the Declined Requests tab. You can undo any declined requests at any point.

Sent Requests

- These are the requests you have submitted to another attendee. Until that attendee schedules a time to meet, the status of the meeting will remain pending. If you are no longer interested in meeting, click the dropdown arrow and select Cancel — the request will be removed.

All Confirmed Meetings

- Once you have a confirmed meeting, the meeting will be moved to the All Confirmed Meetings tab.
- If you would like to **reschedule or change the location of** a meeting, click the Received or Sent requests button. Click the dropdown arrow and select 'Edit'.
    - Only mutually available times will be displayed. Once you select a new time, the meeting will be automatically updated on both calendars.
    - If you are using the subscribe feature to sync your event schedule to your calendar, all information will be automatically updated.

Meeting Calendar

This section is where you can see all of your confirmed meetings and manage your overall schedule.

- You can **view and edit** your meetings by clicking on any event/meeting and clicking the **Edit** button.
- If you would like to delete the event/meeting, click the meeting and select **Cancel**. You will be given the option to select a reason for canceling and/or add a note. Click **Submit.**
- To **change a confirmed meeting time or location:** click on the meeting and select the **Edit** button. You will then be allowed to update the meeting duration, time, and/or location. Click **Submit.**
- To **download your meetings**: click **Export Calendar** in the top-right corner of the page, then subscribe to the type of calendar you use.

If you require any log-in assistance or have any questions about how to use the software, contact the Technical Support team at enduser-support@meetmax.com. For other questions, please reach out to acgsanfrancisco@acg.org.