

LOGGING IN

1. Click on the link to go to The Virtual BIG Deal landing page
2. On the Landing Page, click **“First Time Logging In?”**
3. Enter the email you used to register for The Virtual BIG Deal
4. You will receive an email asking you to create a password to begin scheduling meetings. Create the password, return to the landing page, and log in

*** Your login is unique to this event. Even if you have used the CSS meeting tool before, you must create a new password/profile. ***

Sign in to your Conference Scheduling Solutions account.

Username

Enter your username

Password

Enter your password

[Click here to read our Data Policy](#)

Login

Forgot your password? [Reset it.](#)

First Time Logging In?

The Virtual BIG Deal

First time login

Email

Enter the email address used for registration

Send Registration Email

Cancel

Welcome!

CONFIRM YOUR PASSWORD

Hello -

Please click the link below to complete your password and start your participation in the meeting scheduling system for the event.

Click the button below, or right mouse click to copy the link for the appointment system site.

CREATE A PASSWORD TO REQUEST MEETINGS

This email is sent from:
Conference Scheduling Solutions (CSS)

For technical support, please email help@conferencesolutions.com.

SET UP YOUR PROFILE

- Upload a profile picture
- **Select how frequently you would like to receive emails from the tool about your meeting requests**
- Update any other information
- Click **“Save Changes”** at the bottom

The Virtual BIG Deal

Profile Account Information Demographics

Kate Hadden
Director of Marketing at ACS Boston

photo (.jpg, .png, .gif) Browse
Image size 200 x 200

First Name
Kate

Last Name
Hadden

Title
Director of Marketing

Company Name
ACS Boston

Receive No Email Notifications
Receive Email Notification for Each Request
☒ Receive Periodic Email Digests

Location
Address 1
Address 2
City
Bridgetown
State
- Select -
Zip
Country
Barbados

Contact Details
Display Email Address
khadden@acsboston.org
Website
Phone Number
LinkedIn
eg. <https://www.linkedin.com/in/john>

Save Changes

- Navigate to the **“Demographics”** tab at the top of your Profile
- **Click “Change Answers”** to add/select demographics
- **Select what information you would like to provide - note: these will help other attendees find you in the tool**
- Click **“Save Changes”** at the bottom

*** We HIGHLY ENCOURAGE you to fill out the Demographics of your profile - it is how other attendees will find you, in order to request meetings with you. ***

The Virtual BIG Deal

Profile Account Information Demographics

Kate Hadden
Director of Marketing at ACS Boston

Primary Function
To select multiple rows, hold down the CTRL (Windows) or CMD (Mac) key and click
Corporate Development
Family Office
Investment Bank
Lender
Other
Private Equity

Industry Focus
To select multiple rows, hold down the CTRL (Windows) or CMD (Mac) key and click
Aerospace / Defense
Business & Commercial Services
Consumer Products
Education & EdTech
Energy
Financial Services
Food & Bev
Generalist

Investment Strategy

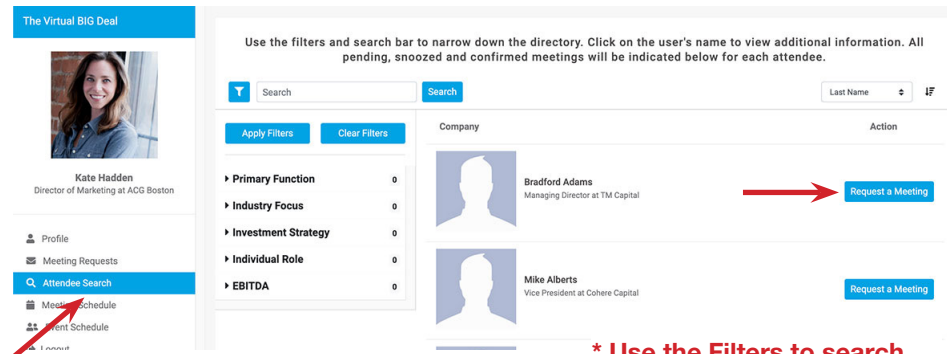
Individual Role

EBITDA

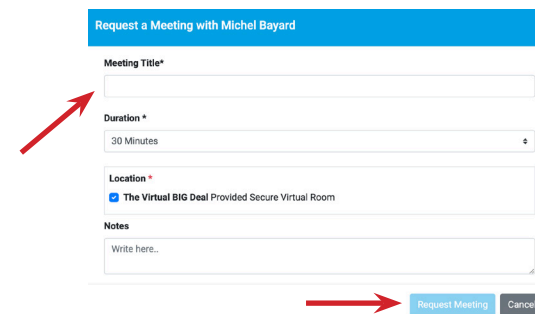
Cancel Save Changes

SEND & ACCEPT MEETING REQUESTS

- Navigate to the “**Attendee Search**” section of the tool
- Use the filters, or search by Name and Company, to find the individual with whom you’d like to meet

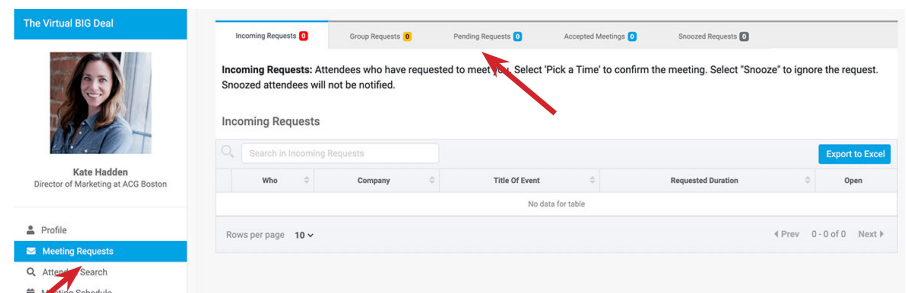


- When you’re ready to send a meeting request, click “**Request a Meeting**”
- Type in a “Meeting Title” (ex. Request to meet), select the Duration of the meeting, and write a Note to the individual, if desired. Click “Request Meeting”
- The person who *receives* the meeting request will be able to select a mutually available time to meet

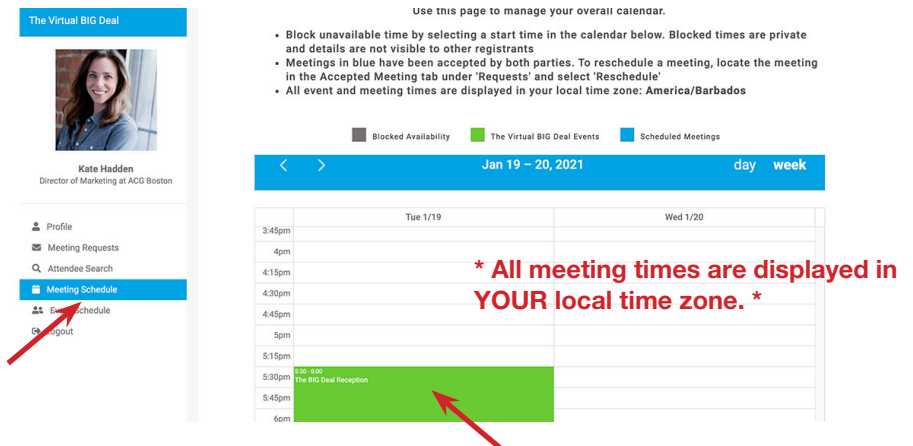


* Use the Filters to search by Demographic (primary function, industry, etc.). Use the Search bar to search by Name and Company ONLY. *

- In the “**View All Requests**” section of the tool, you’ll also be able to see “**Incoming Requests**” (meeting requests sent TO you), **Pending Requests**, **Group Requests**, **Accepted Meetings**, and **Snoozed Meetings** (meetings you’re unsure you want to accept just yet)
- From here you can see your incoming requests, accept them, snooze them (if you aren’t ready to accept just yet), and add or accept group meeting requests



- In the “**My Meeting Schedule**” section of the tool, you’ll see your personal meeting schedule
- **TO START A MEETING:** when it’s time to start a meeting, simply click on the meeting on your calendar, and the private link to your virtual meeting will appear



GROUP MEETINGS

- If you have **SENT** a meeting request (i.e., you are the originator of the meeting), there is the option to add extra individuals to your meeting
- Once your meeting request has been accepted, go to “View All Requests,” and “Accepted Meetings” - click on the Eye Icon next to the accepted meeting
- From there, click “Invite Others”
- Search for the individual you would like to invite, select her or his name, and hit “enter”
- The individual will now be able to see the group meeting request in their “Group Requests” section
- If the other individual accepts the group meeting request, she or he will now appear in the list of attendees when you view your meeting

Unfortunately, if you did not originate the meeting request, then you are unable to add extra individuals to the meeting at this time.

The screenshots illustrate the steps to add invitees to an accepted meeting:

- Accepted Meetings List:** A table showing accepted meetings. The first row is for a meeting on Jan 19, 2021, at 8:45 AM, titled 'Meeting Request Test' by Christy Dancause. An eye icon is visible next to the meeting name.
- Meeting Details:** Clicking the eye icon opens a modal for the meeting. It shows the duration (15 minutes) and the time zone (America/Barbados). Buttons for 'Reschedule', 'Invite Others', and 'Cancel' are present.
- Invite Others:** Clicking 'Invite Others' opens a search modal. A search bar contains 'Emily'. Below, a list shows 'Emily Silva' with email 'esilva@acgboston.org' and a note to 'Press enter to select ACG Boston'.
- Legend:** A legend indicates that a green checkmark means 'Accepted', a red X means 'Rejected', and a blue circle means 'Pending'.

EVENT AGENDA

- In the “**Event Agenda**” section, you can add any events you’d like to attend (for ex. the Virtual BIG Deal Reception).
- These will show up in “My Meeting Schedule” as well, and will block off the time from your calendar, so you won’t be able to schedule 1:1 meetings during that time

The screenshots show the Event Agenda and Meeting Schedule:

- Event Agenda:** A dashboard titled 'The Virtual BIG Deal Events Dashboard' showing a table of events. The first event is 'The BIG Deal Reception' on Jan 19, 2021, from 5:30 PM to 8:00 PM, located in the 'Virtual Ballroom'.
- Meeting Schedule:** A sidebar menu on the left shows the user's profile and a list of items including 'Event Schedule', which is highlighted with a red arrow.

EXPORT YOUR MEETING SCHEDULE

- **When all your meetings are finalized**, you can export your meetings – you can download to Outlook. Note: each meeting has a UNIQUE URL embedded in the .ics file, which is your private meeting link. The meeting link can also be found in the “My Meeting Schedule” section of the tool, when you click on the meeting you would like to join.