



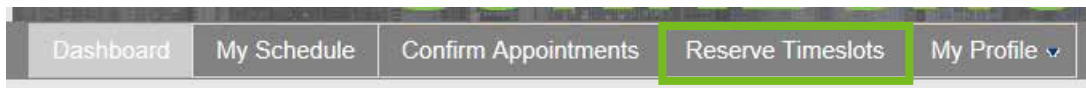
DEALSOURCE NORTH MATCH-UP HOW-TO's for PRIVATE EQUITY FIRMS

The DealSource North Match-Up system will allow you to request meetings with Investment Banks at the 2019 DealSource North. **Please ensure that you update your profile under the “My Profile” tab before you begin to request meetings.**

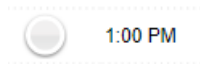
[Click Here to Access the Match-Up Website](#)

A. HOW TO BLOCK OFF TIME IN YOUR SCHEDULE

1. Navigate to the “**Reserve Timeslots**” Tab



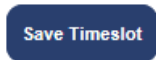
2. Select the circular button beside the time slot to block off a timeslot



3. The button will turn orange to indicate the timeslot is blocked off by you



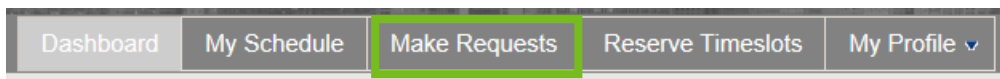
4. Select “Save Timeslot”



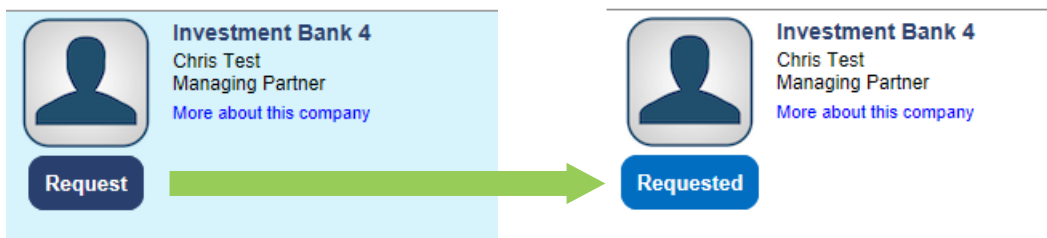
TIP: You can change the label for the reserved timeslot

B. HOW TO REQUEST AN APPOINTMENT WITH AN INVESTMENT BANK

1. Navigate to the “**Make Requests**” Tab



2. Browse through the list of Investment Banks that are participating in DealSource
3. Select the blue “**Request**” button located below the profile photo

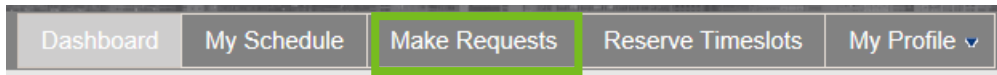


4. The request will now be sent to the Investment Bank. They will be notified through email of your request

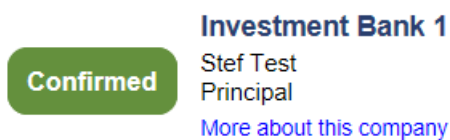
TIP: Your appointment request can only be confirmed by the Investment Bank. Once they have confirmed the appointment, it will be populated in your schedule, and you will be sent a confirmation email.

C. HOW TO CANCEL AN APPOINTMENT WITH AN INVESTMENT BANK


1. You will receive an email that states an Investment Bank has scheduled a meeting with you.
2. Login on to the website
3. Navigate to the **“Make Requests”** tab on the top bar



4. Select the **“Confirmed”** button



5. You will be prompted to cancel the meeting, select **“OK”** to cancel and remove the meeting from your schedule.

TIP: You can also remove an appointment from your schedule by navigating to the **“My Schedule”** tab, and selecting the remove button  beside the meeting you would like to cancel.



C. HOW TO PRINT YOUR SCHEDULE

1. Navigate to the **“My Schedule”** tab
2. Select **“Print Appointment Schedule”**