

How to Use the Meeting Platform

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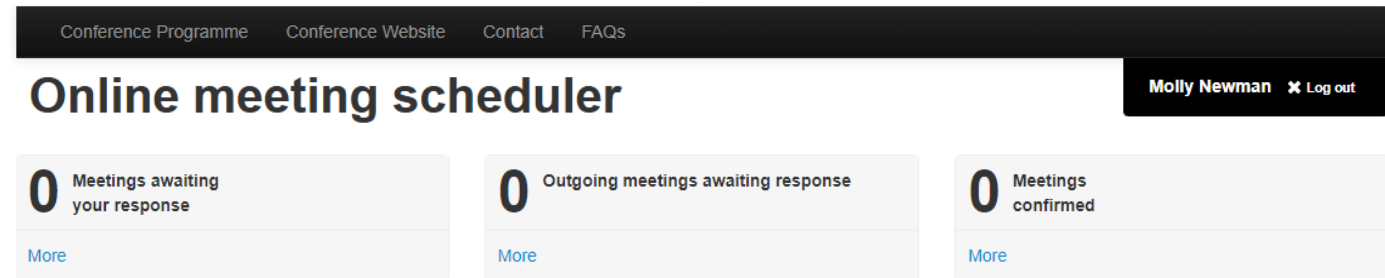
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Access

You should have received an email from the platform, with the subject line ‘— --’.

This contains a link, click it to gain immediate access to your online account.

You should see this on your screen →



If instead you see this
- click the button ‘REQUEST ACCESS’ and enter your email address to receive a new access link



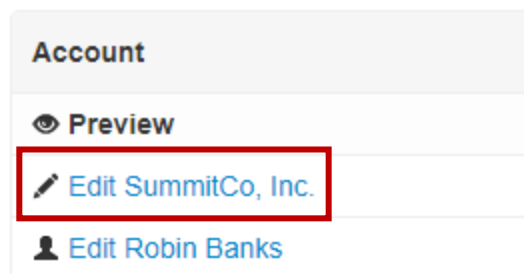
If you can see this, you are logged out. For instant login, click the above button and enter your email address.

Profile Update: Company

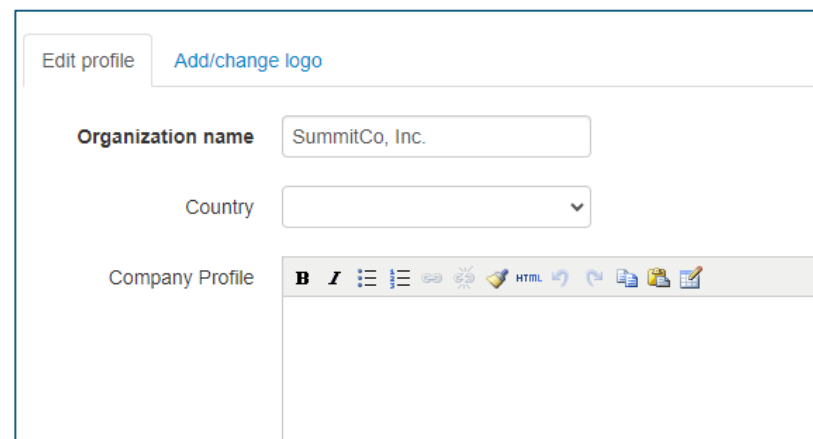
1. Go to the Account link in the top menu bar:



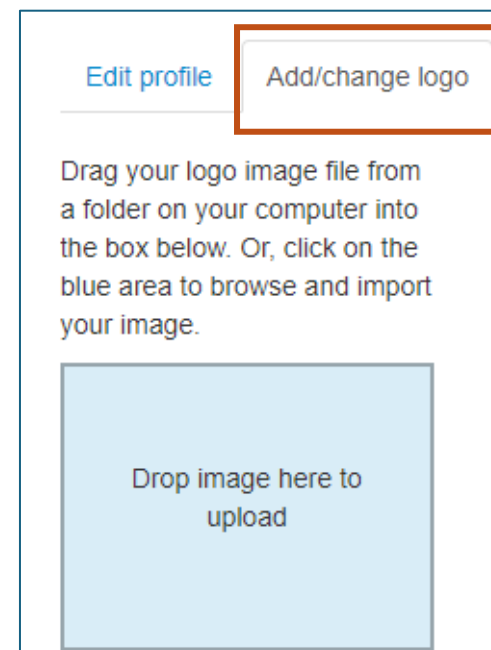
2. Click the Edit link at the left of the page to update your company profile:



3. Enter profile information, then Save

A form titled "Edit profile" with a tab "Add/change logo". It contains three fields: "Organization name" with the text "SummitCo, Inc.", "Country" with a dropdown menu, and "Company Profile" with a rich text editor toolbar (containing bold, italic, list, link, image, HTML, and other icons) and a text area.

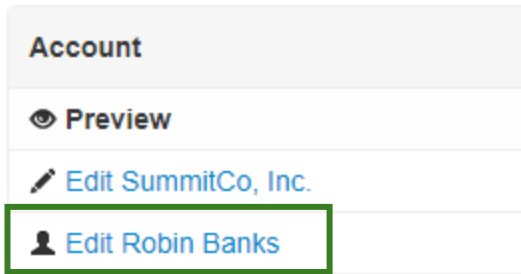
4. Add your company logo.
Click Add/change logo then drag/drop a .png or .jpg image file of less than 2Mb

A section titled "Add/change logo" with a blue "Edit profile" link to its left. Below the title, there is a text instruction: "Drag your logo image file from a folder on your computer into the box below. Or, click on the blue area to browse and import your image." Below this text is a large light blue rectangular box with the text "Drop image here to upload" inside it. The "Add/change logo" title is highlighted with an orange rectangular box.

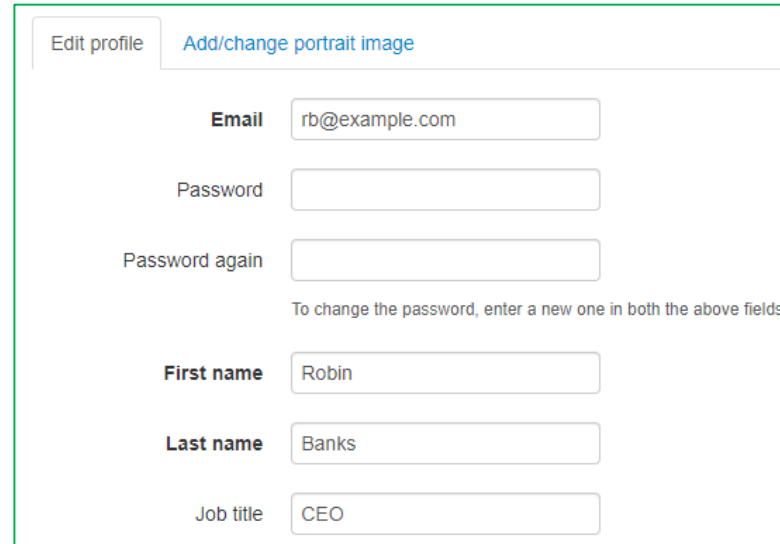
Make sure you click **Save** before leaving the Edit profile area.

Profile Update: Personal

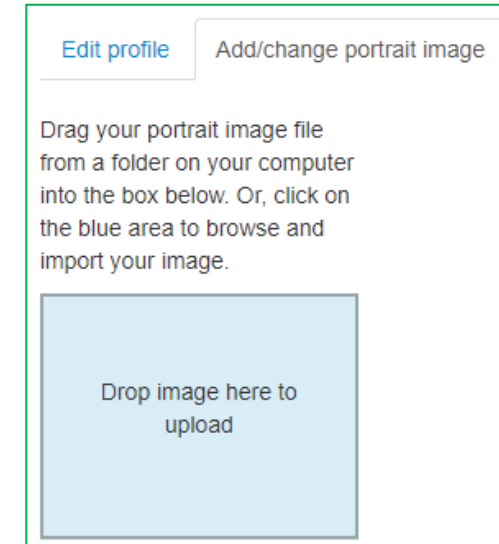
5. Click the Edit link at the left of the page to update your personal profile:



6. Check your personal details and update if needed. If you prefer to use password access, add an 8 character password to **both** password fields

A screenshot of the 'Edit profile' form. The form has two tabs at the top: 'Edit profile' (selected) and 'Add/change portrait image'. The form contains several input fields: 'Email' (pre-filled with 'rb@example.com'), 'Password', 'Password again', 'First name' (pre-filled with 'Robin'), 'Last name' (pre-filled with 'Banks'), and 'Job title' (pre-filled with 'CEO'). Below the password fields, there is a note: 'To change the password, enter a new one in both the above fields'.

7. Add your portrait photo. Click Add/change image then drag/drop a .png or .jpg photo file of less than 2Mb

A screenshot of the 'Add/change portrait image' form. The form has two tabs at the top: 'Edit profile' and 'Add/change portrait image' (selected). Below the tabs, there is a text instruction: 'Drag your portrait image file from a folder on your computer into the box below. Or, click on the blue area to browse and import your image.' Below this instruction is a large blue rectangular area with the text 'Drop image here to upload' in the center.

Make sure you click **Save** before leaving the Edit profile area.

Set Your Availability

1. Go to the Schedule link in the top menu bar:

The screenshot displays a web application interface for setting availability. At the top, a dark blue navigation bar contains links for HOME, SEARCH, MESSAGES, SCHEDULE (highlighted with a red box), and ACCOUNT. Below this, the main content area shows a calendar view for Thursday, 31 October 2024. On the left, a sidebar allows switching between 'My Itinerary', 'Day' (highlighted with a red box), 'Week', and 'Month' views. Below this, there are options for 'Sessions 31' and buttons for 'Add to calendar' and 'Printable Itinerary'. The central part of the interface is a grid with time slots (08:00, 08:30, 09:00, 09:30, 10:00, 10:30) and columns for 'Availability', 'My Itinerary', and 'Sessions'. In the 'Availability' column, a green toggle switch for the 09:00 slot is highlighted with a red box and labeled 'Available'. Below it, another green toggle switch is also labeled 'Available', and a third toggle switch is labeled 'Unavailable'.

2. Select 'Day'

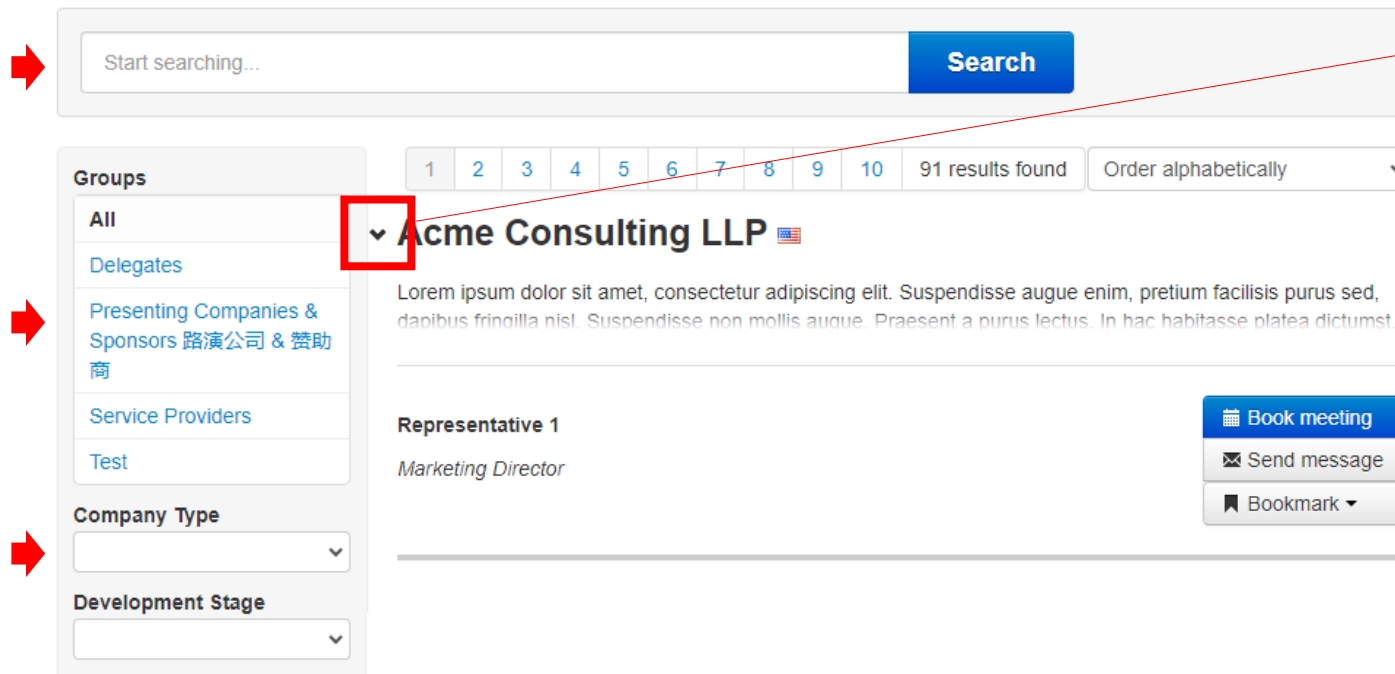
3. Toggle the green slider on any time slot to make it unavailable for meetings

Find Meeting Partners and Book Meetings

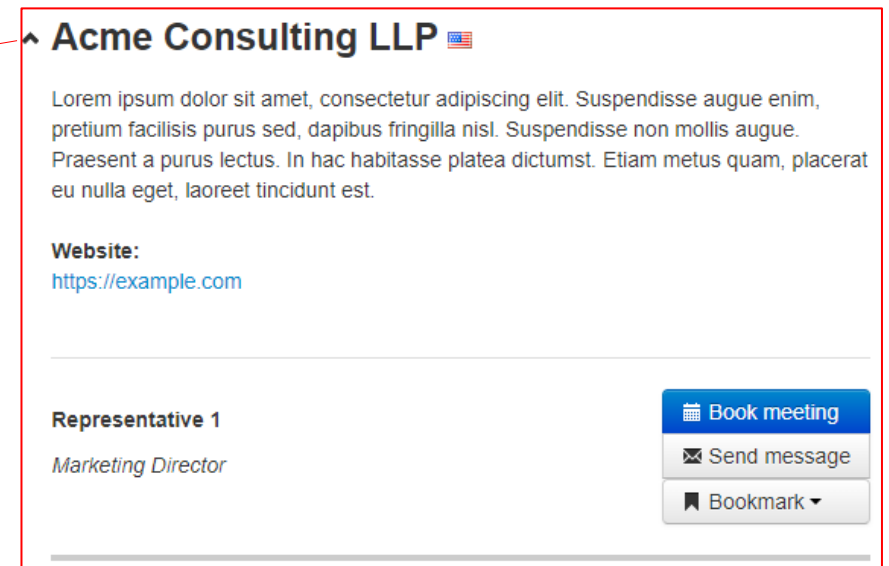
1. Go to the Search in the top menu bar. You will find all organizations and attendees listed here:



2. Use the filters at the left and the text search field at the top to look for potential business targets



3. Click the arrow next to the company name to view their full profile.



Book Meetings

1. Click the 'Book meeting' button next to the person you want to meet.

▼ Acme Consulting LLP 🇺🇸 #

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse augue enim, pretium facilisis purus sed, dapibus fringilla nisl. Suspendisse non mollis augue. Praesent a purus

Representative 1

Marketing Director

📅 Book meeting

🔖 Bookmark

2. Select a meeting time. Only the green slots are available to both you and the other person.

Click on a *green* meeting slot to request a meeting

28 Nov	
10:20	66 meeting places available
10:40	66 meeting places available
11:00	66 meeting places available
11:20	66 meeting places available
11:40	66 meeting places available
12:00	66 meeting places available
12:20	66 meeting places available
12:40	66 meeting places available
14:00	66 meeting places available

3. Add a message to explain why you want to meet, then click 'Yes'.

An email will be sent to the other person with your message, asking them to respond.

Optional message

Send a message to everyone attending this meeting

Yes

Are you sure you wish to request this meeting?

Manage Meetings - 1

1. Your incoming meeting requests are listed on the Home page



2. Click 'More' to view the profiles of your requestors

3 Meetings awaiting your response

Dr Jo Bangels (Acme Oncology, Inc.) on 8 Oct at 15:20

Dr Lorenzo Ferrari (Super Biologics) on 8 Oct at 14:40

Ms Geeta Patel (Dynamic Drugs) on 8 Oct at 14:00

More

1 Outgoing meetings awaiting response

Mr Pablo González (Gorgeous Generics) on 8 Oct at 16:00

More

0 Meetings confirmed

More

More

Manage Meetings - 2

3. Click 'Respond' beneath the name of each requestor to confirm or decline their request.

▼ Acme Oncology, Inc.

The Acme of Oncology drug development companies. We are now offering our lead program for partnership. AOX2139 is a small molecule drug based on our proprietary



Mr Wei Li

Chief Executive Officer

Book meeting

Send message

Bookmark ▼



Dr Jo Bangels

Chief Scientific Officer

Book meeting

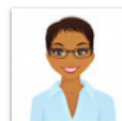
Send message

Bookmark ▼

Dr Jo Bangels has requested a meeting with you on 8 Oct, at 15:20 [Respond](#)

▼ Dynamic Drugs

The first line of each profile appears on the search page. Click More to view the full profile. Each delegate is able to add or edit their own company profile, adding a logo and selecting



Ms Geeta Patel

Chief Executive Officer

Book meeting

Send message

Bookmark ▼

Ms Geeta Patel has requested a meeting with you on 8 Oct, at 14:00 [Respond](#)

Manage Meetings - 3

4. Select your response from the console tabs. Be sure to click the button to complete the action.

The screenshot displays the 'Meeting with Representative 1' interface. On the left, a 'Meetings' sidebar lists 'All meetings', 'Pending', 'Confirmed', and 'Cancelled'. The main area shows response options: 'Confirm' (checked), 'Colleagues', 'Reassign', 'Reschedule', and 'Decline'. Below these is a 'Message' section with a text input field labeled 'Optional message' and a 'Confirm meeting' button highlighted with a red border. A green callout box points to the message field with the text: 'You can add a message to your response. This will be included in an email to your meeting partner.' Below the message field, meeting details are listed: 'Time: Nov 20 From 10:00 until 10:30 America/New_York', 'Your start time: Nov 20, 3:00 PM - 3:30 PM Europe/London', 'Booked by: Representative 1 from Chemicals Construction', 'Attendee: Representative 1 from Able Automotive', and 'Meeting Place: (Pending)'. On the right, a 'Chat' panel titled 'Participants (1)' shows a message from 'Representative 1' at '10:55 14 Aug 2024' saying 'Hoping to meet with you and discuss our latest initiatives.' An orange callout box points to the chat panel with the text: 'You can send a private message via the Chat panel without changing the status of the meeting request'. At the bottom of the chat panel, there is a text input field labeled 'Type a message...' and a 'Send' button, both highlighted with an orange border.

Meetings

- All meetings
- Pending
- Confirmed
- Cancelled

Meeting with Representative 1

✓ Confirm 👤 Colleagues ⚡ Reassign ✏ Reschedule ✕ Decline

Message

Optional message

Confirm meeting

Time: Nov 20 From 10:00 until 10:30 America/New_York

Your start time: ⌚ Nov 20, 3:00 PM - 3:30 PM Europe/London

Booked by: Representative 1 from Chemicals Construction

Attendee: Representative 1 from Able Automotive

Meeting Place: (Pending)

Chat **Participants (1)**

Start of conversation.

Representative 1 10:55 14 Aug 2024
Hoping to meet with you and discuss our latest initiatives.

Type a message... **Send**

You can add a message to your response. This will be included in an email to your meeting partner.

You can send a private message via the Chat panel without changing the status of the meeting request

Personal Itinerary

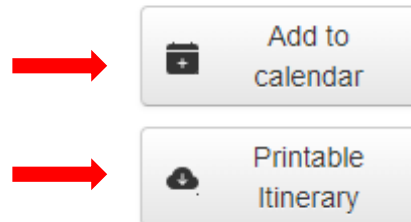
1. Go to the Schedule link in the top menu bar:



2. Select My Itinerary



3. Follow the links at the left to download your Itinerary as a PDF and/or integrate it into your Outlook calendar.



8 Oct

✓ 14:20 - 14:40
Table 1

Dr Jo Bangels
Acme Oncology, Inc.

Also attending
Mr Wei Li *Acme Oncology, Inc.*

✓ 14:40 - 15:00
Table 1

Mr Fred Fredrickson
e-Commerce International

Also attending
Mr Wei Li *Acme Oncology, Inc.*

✓ 15:20 - 15:40
Table 1

Ms Penny Plimsoll
NewBio Co

Also attending
Mr Wei Li *Acme Oncology, Inc.*

Send Private Messages

You can send an email message to any other attendee. On the Search page, click their Message button then type in your message.

The other attendee will receive your message within an email. This email will not reveal your contact details unless you include these in the message.

The image shows a two-part workflow for sending private messages. On the left, a user profile for 'Technology Institute' is shown, featuring a 'Send message' button highlighted with a red box. A red line connects this button to the right-hand screenshot. The right-hand screenshot shows the chat interface for 'Meeting: Representative 1 (Acme Consulting LLP)'. At the bottom, the message input area is highlighted with a red box, containing a text field labeled 'Type a message...' and a blue 'Send' button.

Technology Institute

Representative 1
Business Development Director

Book meeting

Send message

Bookmark

+ Start a new chat...

Search for an attendee

Meeting: Representative 1 (Acme Consulting LLP)

09:00 20 Nov 2024

Chat Participants (1)

Start of conversation.

Representative 1 01:37 15 Aug 2024
Hello - before responding to your kind meeting request...

Meeting: Representative 1 (Acme Consulting LLP)

Representative 1 01:36 15 Aug 2024
Thank you for your meeting request - I have accepted...

Representative 1 12:06 13 Aug 2024
Hoping to meet and discuss our new initiative

01:36 15 Aug 2024
Thank you for your meeting request - I have accepted it via the platform

Type a message...

Send

View Messages

Go to the Messages link in the top menu bar:

[HOME](#)[SEARCH](#)[MESSAGES](#)[SCHEDULE](#)[ACCOUNT](#)

Start a new chat...

Search for an attendee

Mr Fred Fredrickson

10:43 28 Nov 2024

Hoping to catch up with you at the event. Would you...

Ms Penny Plimsoll

11:25 29 Sept 2022

message

Mr Otto Bahn

10:58 29 Sept 2022

Hello Jane, pleased to meet you!

Mr Fred Fredrickson (Image International)

Chat

Participants (1)

Start of conversation.

Mr Fred Fredrickson 10:43 28 Nov 2024

Hoping to catch up with you at the event. Would you like to schedule a meeting on this platform?

Type a message...

Send

ENDS