FDIC MATCH! Platform Guide

fdic.com

SUMMARY

LOGIN

- You'll start by creating your profile via an email sent from the FDIC team (noreply@meetingportal.clarionevents.com) with the subject:

  Activate your FDIC MATCH! account today!
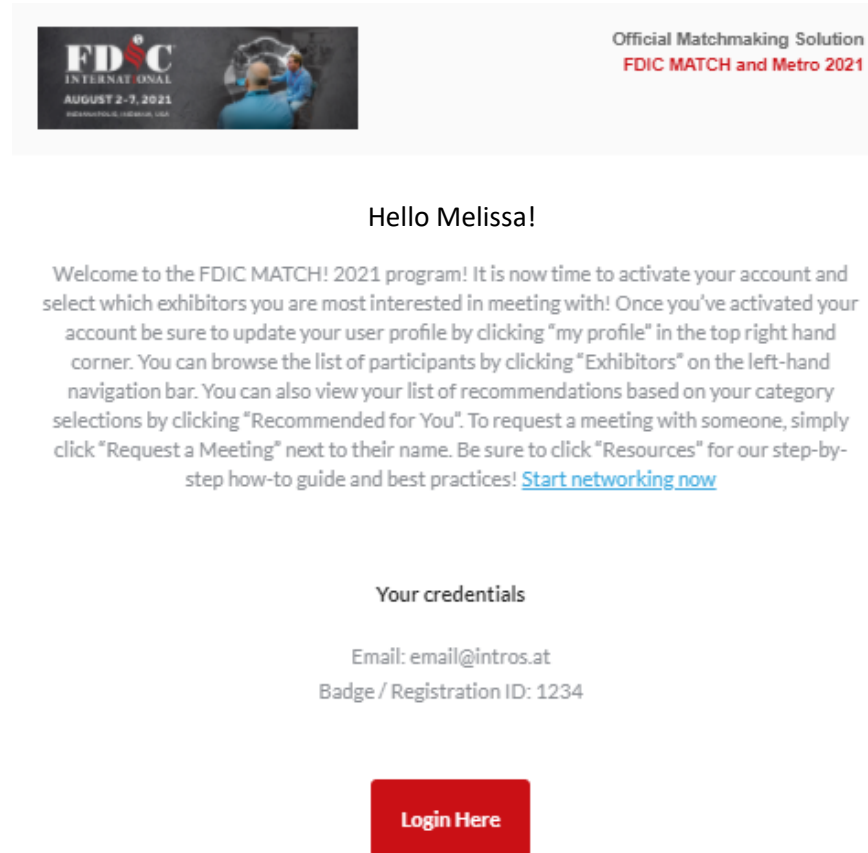
If you don't see this email in your inbox, please check your spam or contact the FDIC team.

LOGIN, *con't*

- Navigate to the event platform and click "**Login**" to claim your account by using your Email Address that you registered with and Badge/Registration ID.

Once you claim your account, you will be able to create a password to use every time you login to the platform.

UPDATE YOUR PROFILE

- Once you're logged in, complete your profile by answering a few, simple questions about you and your department.

- You can always access this information by clicking "**Profile**".
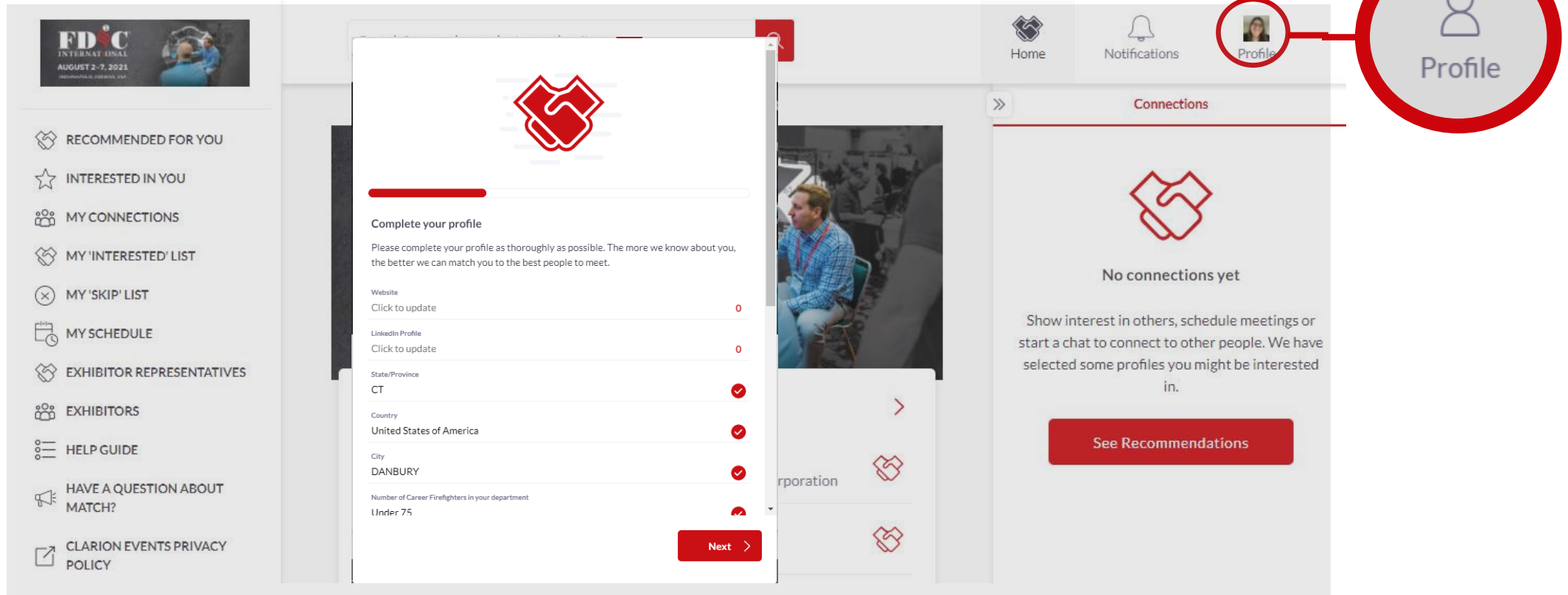
These first steps are crucial to complete as the answers are used by the matchmaking algorithm to generate recommendations.

MANAGE CALENDAR AVAILIBILITY

- Click "**Profile**", then "**Manage My Availability**" on the left navigation bar to keep your calendar up-to-date of days/times you're available to meet.

- A box will pop-up with the event schedule, and you are able to block off days/times so fellow event participants cannot request a meeting with you. Times will automatically adjust to the time-zone you are in.

NETWORK

- To begin networking, click "**Recommended For You**". These are the participants the platform has made for you based on your profile.

The more actions you take in the platform, the more tailored the recommendations will be.

NETWORK, *con't*

- You can also view the entire list of **MATCH! Sponsors** or **Sponsor Representatives** by clicking on the left navigation bar.

- Filter on a particular product or services by clicking "**Products and Services Categories Provided**"

This list of Product and Services includes the top-level category. Be sure to check out the Sponsor's showroom to learn more about them!

CHAT

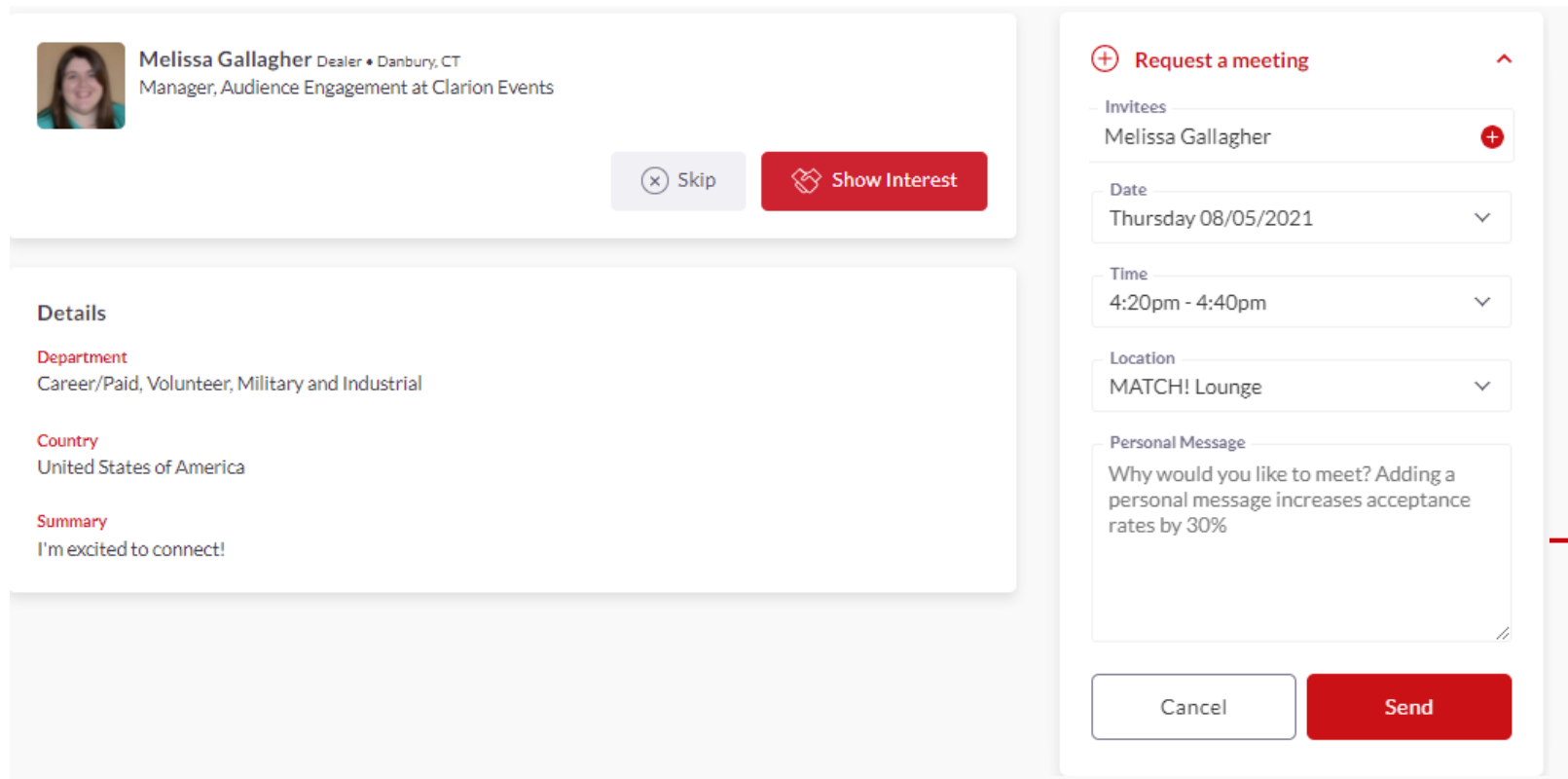- Click "**My Connections**" to view the people you've connected with to chat with fellow event participants.

- You can also send a message to **MATCH! Sponsor** by visiting their **Showroom** page.
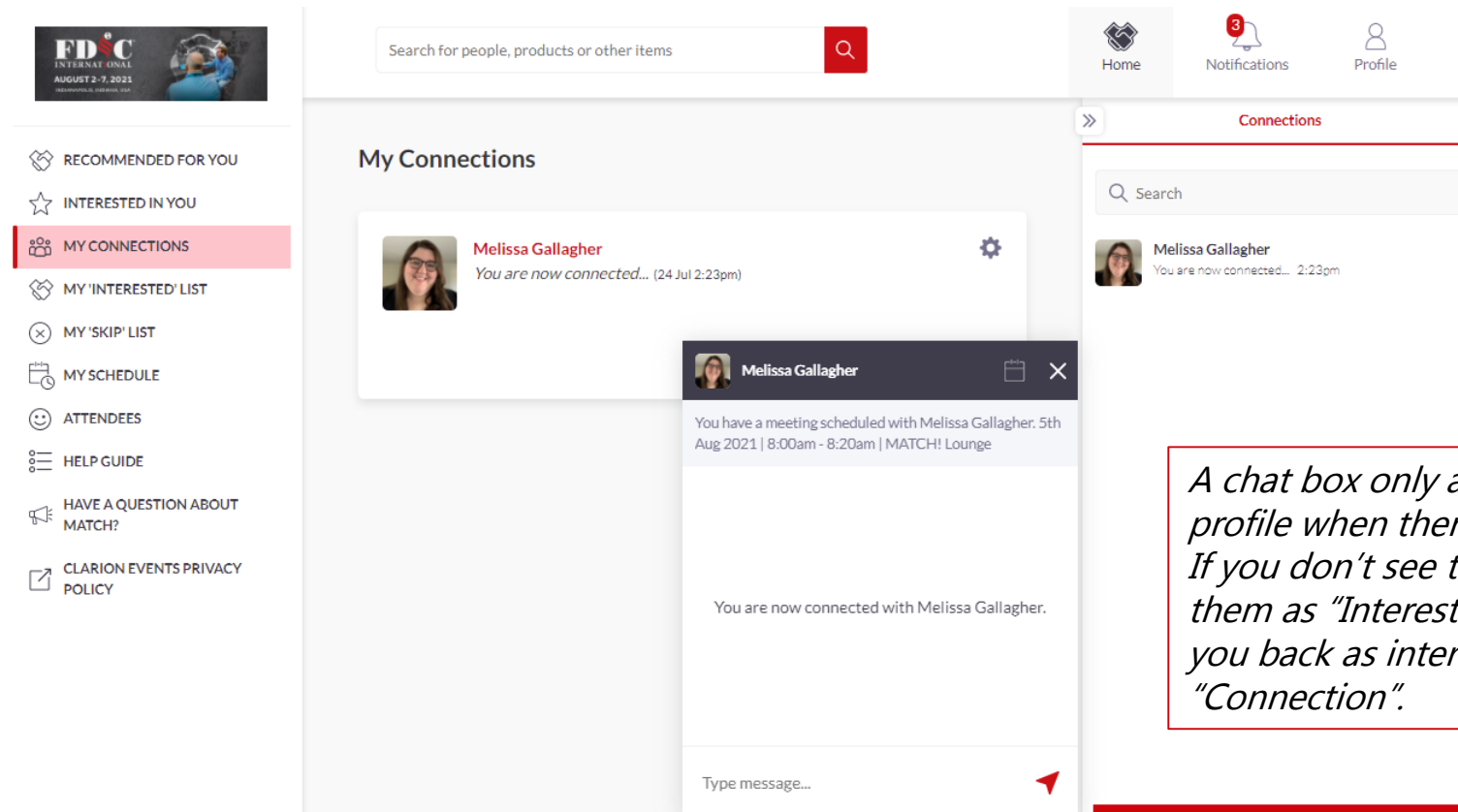
A chat box only appears on an individual profile when there is a mutual connection. If you don't see the chat box, first mark them as "Interested". They can then mark you back as interested to create the "Connection".

REQUEST A MEETING

- While browsing the platform, if you find you'd like to meet with someone, click "**Request a Meeting**" next to their name. From their profile page, you can request a meeting.

- The platform will automatically select a time based available to you and the fellow event participant.

Don't forget to add a Personal Message to your meeting request! It makes it personal, and helps them know who you are!

ACCEPT A MEETING REQUEST

- To accept the meeting request via email, simply click "**Accept**" in the email notification.

- To accept via the platform, click "**My Schedule**" on the left navigation panel. Then filter by "**Meeting Status**" to view all meeting requests still awaiting a response.
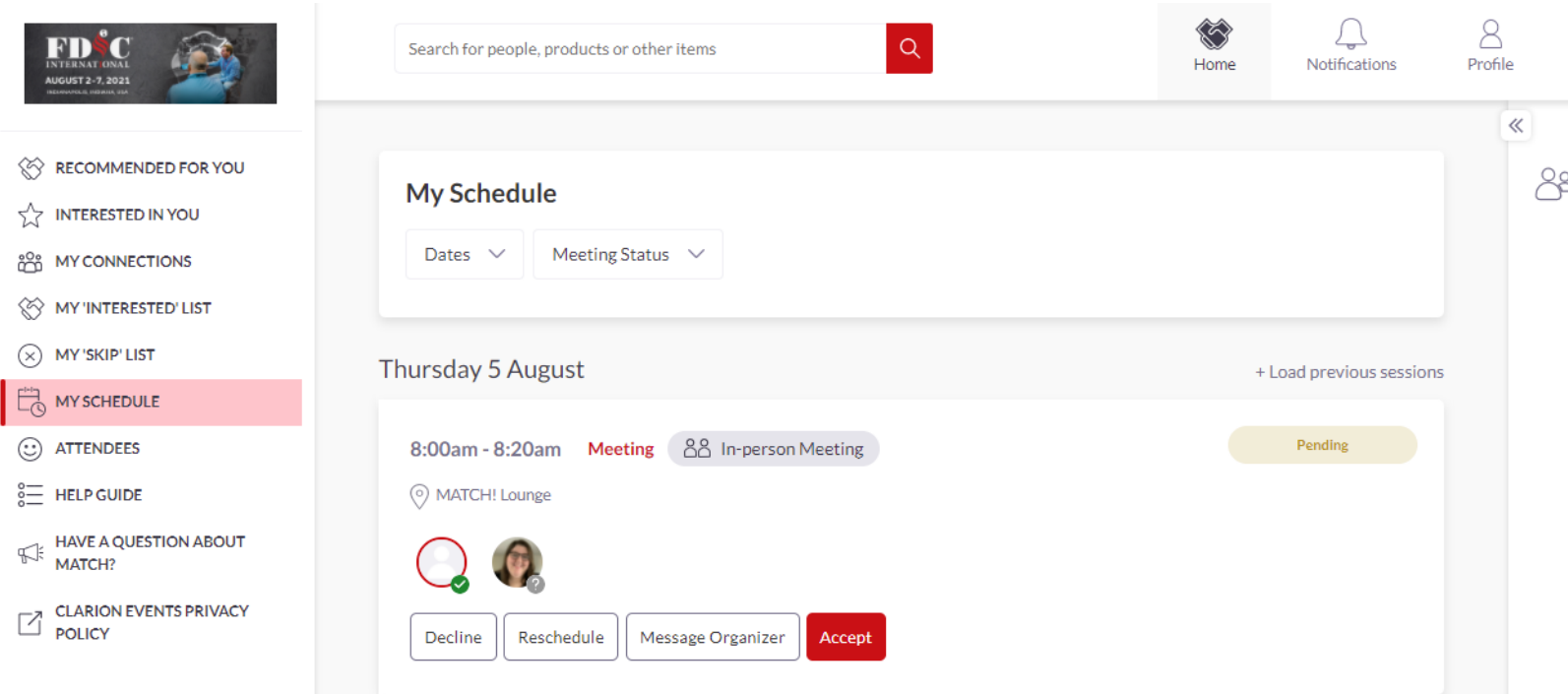
DIFFERENT MEETING STATUSES:

Scheduled: The meeting has been confirmed by both parties.

Pending: Someone has requested a meeting with you and you need to approve it, decline it or reschedule it.

Awaiting Response: You have requested a meeting with someone and they need to approve it, decline it or reschedule it.

Declined: The meeting has been declined by you and/or the other person.

You can also decline or reschedule within the platform.