

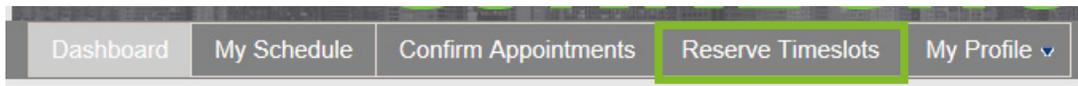
DEALSOURCE MATCH-UP HOW-TO's for INVESTMENT BANKS

The DealSource Match-Up system will allow you to confirm meetings with Private Equity Firms at the 2018 Capital Connection DealSource. **Please ensure that you update your profile under the “My Profile” tab before you begin to confirm 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



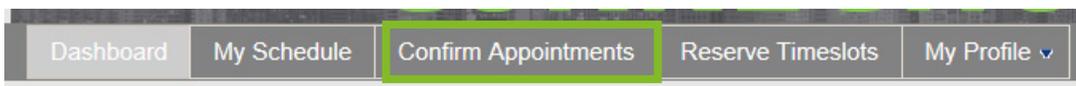
TIP: You can change the label for the reserved timeslot

4. Select “Save Timeslot”

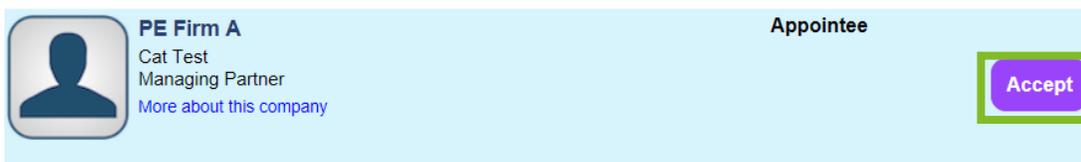


B. HOW TO CONFIRM AN APPOINTMENT WITH A PRIVATE EQUITY FIRM

1. You will receive an email indicating a Private Equity Firm has requested an appointment with you
2. Login to the website
3. Navigate to the “**Confirm Appointments**” tab



4. You will see the requested appointment at the top of your list with a purple button that says “**Accept**”



5. Select **“Accept”** to change the “accepted” appointment with a “pending” appointment.



6. Once the button is blue, and indicates **“Pending”**, select **“Confirm All Pending Appointments”** to confirm and add the appointment to your schedule.

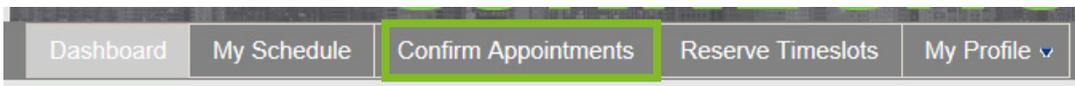
Confirm All Pending Appointments

7. The appointment is now confirmed and the button will change to green - it is now in both yours and the Private Equity firms schedule.

TIP: If you **do not** want to confirm an appointment, **leave it as “Accept”** (purple button)

C. HOW TO MAKE AN APPOINTMENT WITH A PRIVATE EQUITY FIRM

1. Navigate to the **“Confirm Appointments”** tab



2. Select the **“Connect”** button, it will turn blue to indicate the meeting is “Pending”



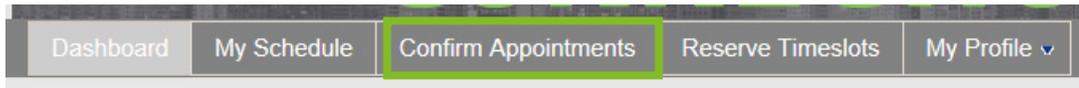
3. You must select **“Confirm All Pending Appointments”** to confirm and add the meeting to your schedule.

Confirm All Pending Appointments

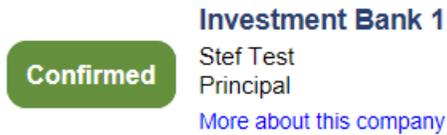
TIP: The Private Equity Firm will receive an email with a confirmation of the appointment, they can then decide to remove the appointment or keep it in their schedule. In the instance that they do cancel the appointment, you will receive an email confirmation.

D. HOW TO CANCEL A MEETING WITH A PRIVATE EQUITY FIRM

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 “**Confirm Appointments**” 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.



E. HOW TO PRINT YOUR SCHEDULE

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