ACG Toronto **CAPITAL CONNECTION 2018**

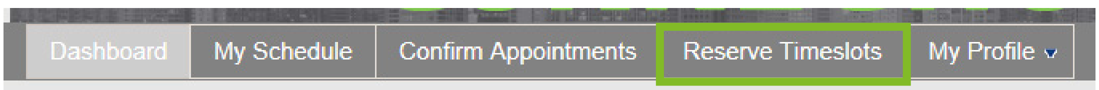
DEALSOURCE MATCH-UP
HOW-TO's for PRIVATE EQUITY FIRMS

The DealSource Match-Up system will allow you to request meetings with Investment Banks at the 2018 Capital Connection DealSource. **Please ensure that you update your profile under the "My Profile" tab before you begin to request meetings.**

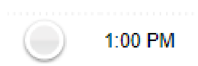
Click Here to Access the Match-Up Website

A. HOW TO BLOCK OFF TIME IN YOUR SCHEDULE

1. Navigate to the "**Reserve Timeslots**" Tab



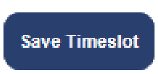
2. Select the circular button beside the time slot to block off a timeslot



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

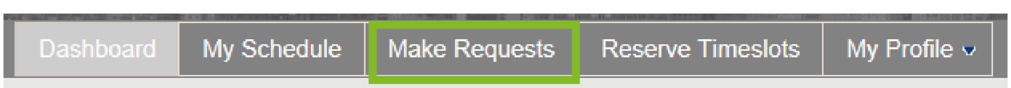
TIP: You can change the label for the reserved timeslot

4. Select "Save Timeslot"

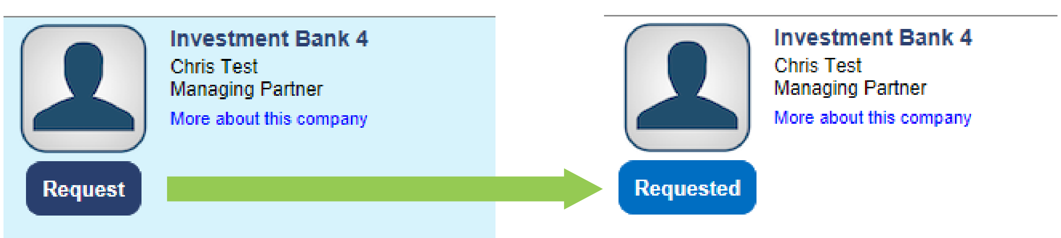


B. HOW TO REQUEST AN APPOINTMENT WITH AN INVESTMENT BANK

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

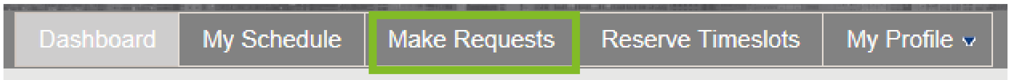


4. The request will now be sent to the Investment Bank. They will be notified through email of your request

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"