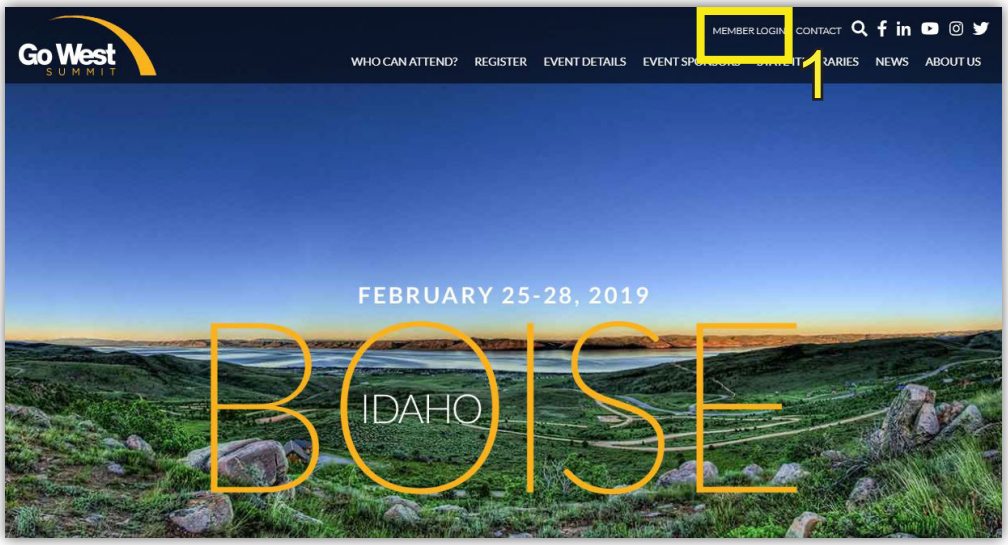
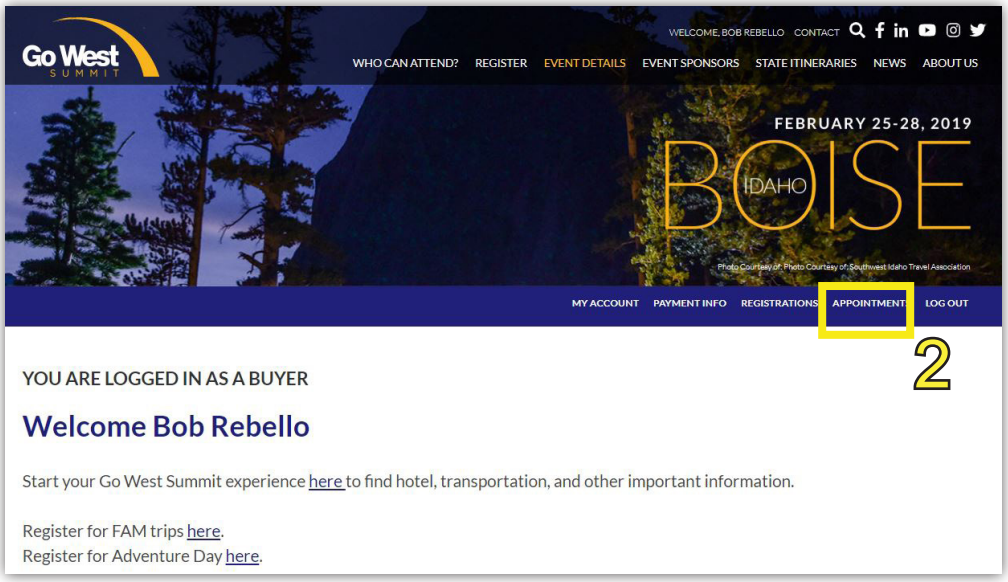
HOW TO REQUEST APPOINTMENTS



Step 1:
Go to www.gowestsummit.com.
Click on **MEMBER LOGIN**.
Enter your login credentials.



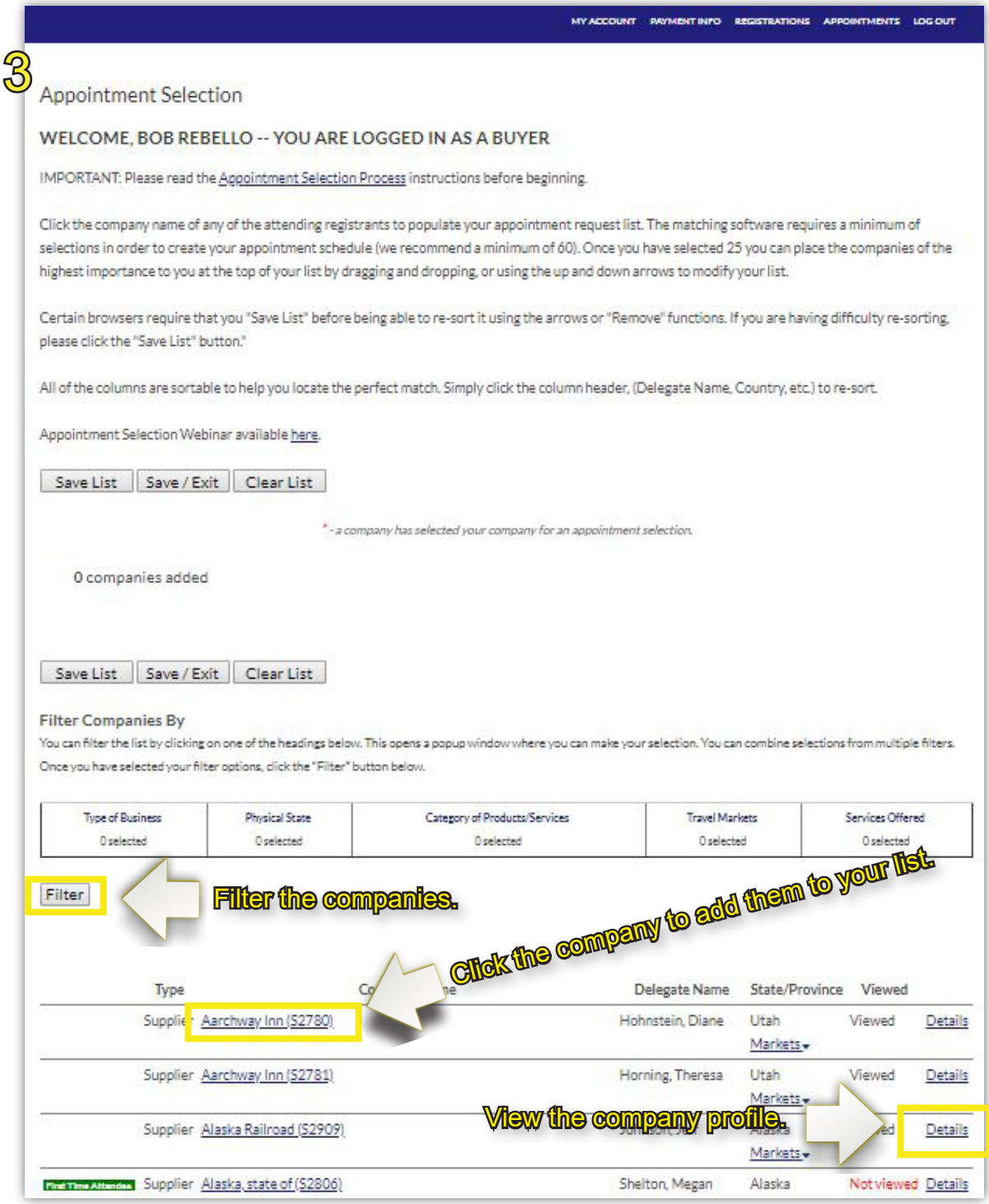
Step 2:
Click on **APPOINTMENTS** in the toolbar on your landing page.
Choose **APPOINTMENT SELECTION** from the drop down menu.

Tip: Make your first round of requests when appointment selection opens, then login again before appointment selection closes to look for late registrants or new mutual requests.

Step 3:

Select the companies you would want to meet.

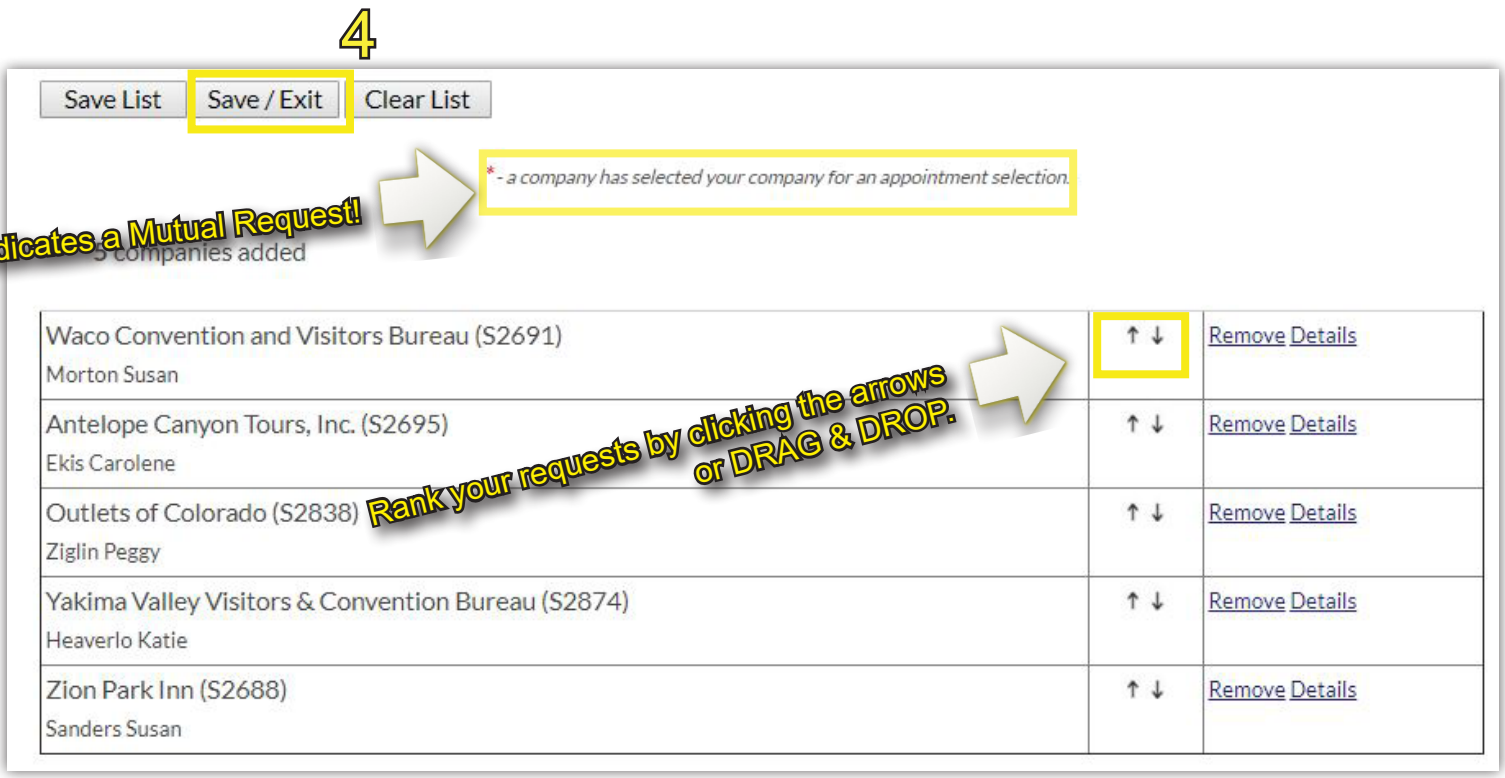
- **CHOOSE** 25 minimum, we recommend you choose 60.
- Scroll down and click the name of the company you want to meet with, highlighted in blue. This will add that company to your appointment request block where you will be able to rank them by priority.
- **FILTER** the companies to make it easier to find compatible businesses.
- See company profiles by clicking **DETAILS**.
- **SAVE** your work. You will receive an email with your appointment requests. You can login to make changes, rank your list, add new companies, or remove requests until appointment selection closes.



Step 4:

Rank your list.

- **PRIORITY REQUESTS** are the companies at the top of your list.
- Click the arrows or **DRAG & DROP** the companies to rank your choices.
- **CHOOSE** at least 25 companies.
- When you're satisified with your ranking, click **SAVE/EXIT**.
- You will receive an **EMAIL CONFIRMATION** with your selected appointment requests.
- **LOGIN AGAIN** to change the ranking or add new companies until appointment selection closes.



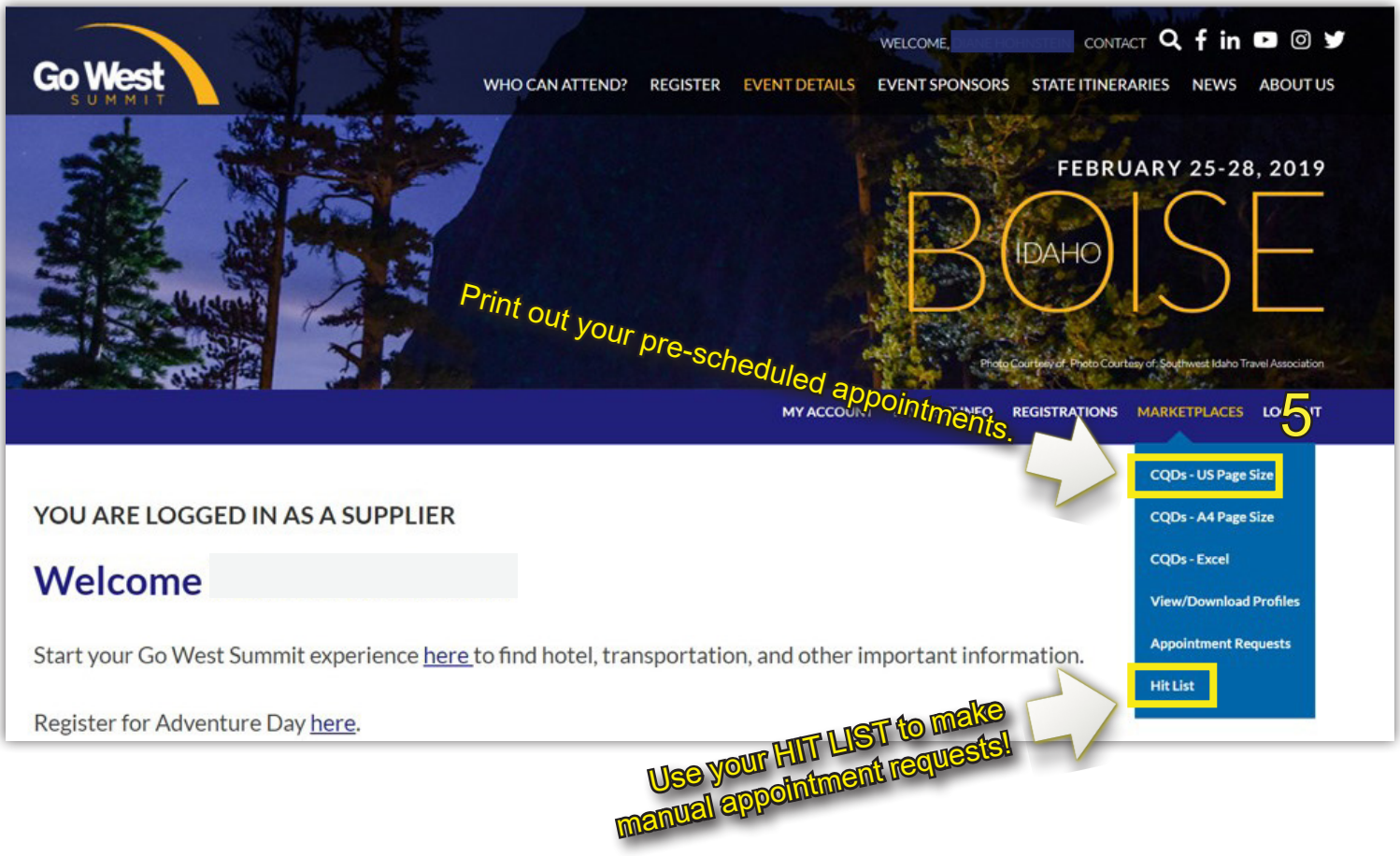
TIPS & TRICKS

- A red star (*) next to the company name means you have a **MUTUAL REQUEST**. The company has asked to meet with you too. Mutual requests are priority for our computer matching software!
- Remember which profiles you have seen: the **VIEWED** text will change from red to black if you have read their profile. This can be helpful if your preferences aren't saved properly.
- **LEARN MORE** on our How-to-Summit page, including a helpful video.
- LOGIN again to do a **FINAL APPROVAL** of your schedule. New mutual requests and late registrations can occur - check back often! You can make changes to your ranked list of requests until appointment selection closes.

Step 5:

After appointment selection closes, login and print out your appointment schedule. Then you can start sending manual appointment requests via email.

- Login to **DOWNLOAD & PRINT** your pre-scheduled appointments from your portal.
- **NEW:** Use your **HIT LIST** to see who you requested, but did not get an appointment with - then email that company directly with a **MANUAL APPOINTMENT REQUEST**.
- Add any new manual appointments to your schedule by hand.
- Use your **HIT LIST** during the Speed Appointment Session.



TIPS & TRICKS

- Send **MANUAL APPOINTMENT REQUESTS** after receiving your pre-scheduled appointments. Contact the companies on your **HIT LIST** via email and ask if they have an open slot.
- Create **PROFILE SHEETS** for your scheduled appointments and come prepared to do business!
- Use your **HIT LIST** during the 5-minute Speed Appointment Session - this is a great way to make a quick introduction with your top companies if you aren't able to schedule an appointment.