



*A hosted buyer event for
gift & souvenir professionals*

THE GATHERING
West

FEBRUARY 7-9, 2023

Town and Country Resort • San Diego, CA

Meeting Portal Guide



**GIFT &
SOUVENIR** GROUP

<https://www.thegatheringevent.com/west>

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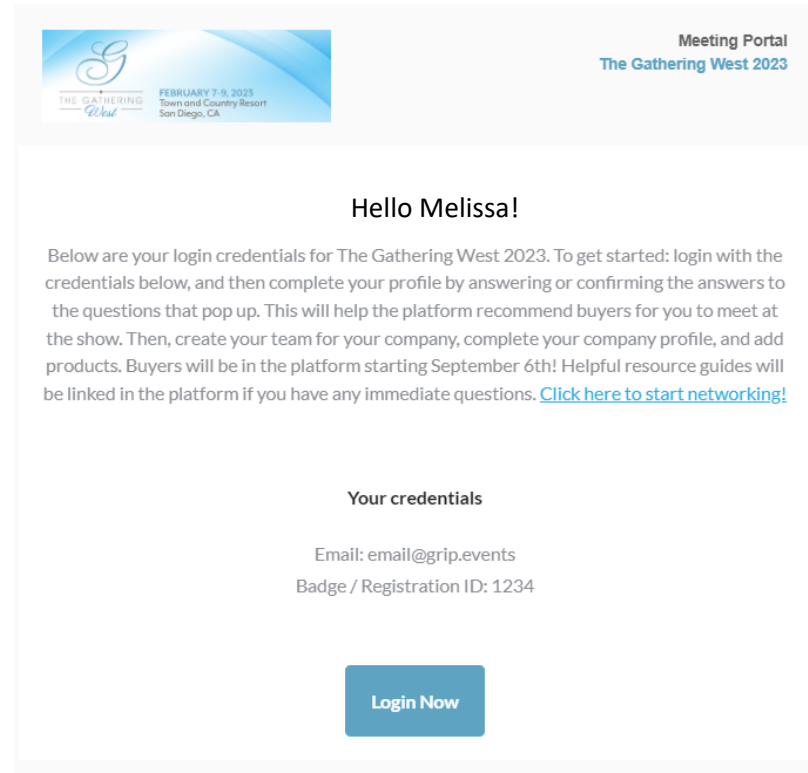
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LOGIN

- You'll start by creating your profile via an email sent from The Gathering team (noreply@meetingportal.clarionevents.com) with the subject: **Welcome to The Gathering West 2023 Meeting Portal!**



If you don't see this email in your inbox, please check your spam or contact The Gathering 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.



Enter the email address you provided when you registered for The Gathering West 2023.

Email

cameron.litcher@clarionevents.com

Login



Enter the Badge ID you received in your welcome email when you registered for the event.

Badge ID / Registration ID

Claim Account



Don't know your badge ID?

[Request a reminder](#)

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, confirm your registration details for you and your department.
- You can always access this information by clicking "**Profile**" at the top right.

The screenshot shows the 'Complete your profile' form in the The Gathering West app. The form is overlaid on a blurred background of the app's home screen. The form has a blue header with a logo and a progress bar. Below the header, there is a title 'Complete your profile' and a paragraph: 'Please complete your profile as thoroughly as possible. The more we know about you, the better we can match you to the best people to meet.' The form contains several input fields: 'Main Product Categories Provided' with a red asterisk and 'Click to update' button, showing '0 (minimum 1)'; 'Country' with a dropdown menu set to 'United States'; 'Website' with a text input field containing 'https://www.thegatheringevent.com/east' and a right-pointing arrow; 'LinkedIn Profile' with a text input field and a 'Click to update' button; and 'Phone / Mobile' with a text input field. A blue 'Next >' button is at the bottom right of the form. To the right of the form, a blue callout box highlights the 'Profile' icon in the top navigation bar, which is a person icon with the word 'Profile' below it. The background app interface includes a search bar at the top, a navigation bar with icons for Home, My Team, and Profile, and a list of connections on the right side.

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 update the times you're available to meet.
 - **Range of Daily Availability:** Easily set up a single range of times for all show days.
 - **Event Days:** Change the times you are available for each day.
- Don't forget to hit "**Save**" when finished.

Search for people, products or other items

My Team

Manage My Availability

During this event, other users can request meetings with you at times set by the organiser. On this page, you can further personalise your availability so that other users can only send meeting requests for times which are convenient for you.

To start, pick the earliest and latest times at which you'd be available for a meeting during this event. If needed, you can then further customise your availability for each day. [Learn more](#)

Range of daily availability ⓘ
All times shown for America/Los_Angeles

12:00am to Midnight [Reset availability](#)

Event Days	Edit Availability
<input checked="" type="checkbox"/> Tuesday - February 7 Add time ranges when you won't be available during the day. from 9:00am to 12:00pm	Done
<input type="checkbox"/> Wednesday - February 8 Unavailable for the entire day	🔄
<input checked="" type="checkbox"/> Thursday - February 9	🔄

Save Changes

Support

Tip! You can print your schedule by exporting your meetings!

Times will automatically adjust to the time-zone you are in.

NETWORK

- To browse the list of **Buyers** click the link on the left navigation bar.

Search for people, products or other items

Switch Events

Home

My Schedule

Schedule of Events

Recommended for You

Wants to Chat

Buyers

Resource Guides

The Gathering West Website

My Connections / Chats

My Chat Requests

My Skip List

Clarion Privacy Policy

Buyers

Sort: Name Location Company Name Job Title Status

Aaron Buyer Skip

Request to Chat Request a meeting

Abby Buyer Skip

Request to Chat Request a meeting

You can take the following actions on event participants:

- Skip:** you are not interested in this person
- Request to Chat:** you are interested and would like to spark a conversation
- Request a Meeting:** you want to request a meeting with that person

When "Requesting to Chat" you can include a personal message by clicking the arrow in the box next to "Request to Chat".

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 available to you and the fellow event participant.

The image shows a user profile for Abby Buyer and a meeting request form. The profile includes contact information, activity logs, and a details section. The meeting request form is titled "Meetings with Abby Buyer" and includes fields for invitees, date, time, location, and a personal message. A callout box points to the "Send" button in the form.

Abby Buyer Buyer
Contact details are private Contact details are private
View Lead Notes Chat

Lead Activity 1
Interested in you

Team Member Activity 1
Viewed by you

Details
Potential Handshake
Abby Buyer is interested in meeting you.

Meetings with Abby Buyer View As: Cameron Litcher

+ Request a meeting

Invitees
Abby Buyer

Date
Tuesday 02/07/2023

Time
8:30am - 9:00am

Location
CLARION EVENTS (30 min)

Personal Message
Why would you like to meet? Adding a personal message increases acceptance rates by 30%

Cancel Send

To cut down on pending meeting requests/taking up time slots, only those buyers who oversee the meetings for their teams/themselves will be able to make meetings.

CHOOSE A MEETING LENGTH

- You have the ability to choose a meeting length of 30, 60, or 90 minutes.
- Start with selecting the **DATE** you want to meet, then choose your **TIME FRAME**. You will notice that the time blocks are reflective of the meeting lengths. For instance, you may see **9:00 AM – 10:00 AM** OR **9:00 AM – 10:30 AM**. *Make sure you are choosing the correct length of time that you would like.*
- Your location will automatically update based on the meeting length you choose, for example “Company Name (30 minutes)” .

The times shown will update based off the calendar availability of you and the requestee within the platform.

30 Minute Meeting

60 Minute Meeting

90 Minute Meeting

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

The screenshot shows a user interface for managing meeting requests. On the left is a navigation sidebar with options: Home, My Schedule (highlighted), Schedule of Events, Recommended for You, Wants to Chat, Buyers, and Resource Guides. Below this are links for 'The Gathering West Website', 'My Connections / Chats', 'My Chat Requests', 'My Skip List', and 'Clarion Privacy Policy'. The main content area is titled 'Tuesday 7 February' and '+ Load previous sessions'. It displays a meeting request for '9:00am - 10:30am Meeting' with a status of 'Pending'. The meeting is for 'CLARION EVENTS (90 min)' and involves 'Aaron Buyer' and 'Cameron Litcher'. Below the meeting details are buttons for 'Decline', 'Reschedule', 'Message Organizer', and 'Accept'. The next section is titled 'Wednesday 8 February' and displays a meeting request for '9:00am - 10:00am Meeting' with a status of 'Awaiting Response'. This meeting is for 'CLARION EVENTS (60 min)' and involves 'Cameron Litcher' and 'Ashley Roina'. Below the details are buttons for 'Cancel' and 'Reschedule'.

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.

Teams | COMPANY PROFILE

- To edit your Company Profile, click **"My Team"** at the top-right. Then, click **"Company Profile"** on the left navigation bar.
- Edit each individual field, then click **"Update Profile"** at the bottom of the page.

The screenshot shows the Microsoft Teams interface for 'CLARION EVENTS'. At the top, there is a search bar and navigation icons including a home icon, a notification bell with '3', and a 'My Team' button with a profile picture. Below this is a navigation bar with tabs: 'Meetings', 'Inbound Leads', 'Company Chat', 'Contacts', 'Team Members', 'Company Profile', 'Product', and 'Export'. The 'Meetings' tab is active, displaying a calendar view for 'Tuesday February 07', 'Wednesday February 08', and 'Thursday February 09'. The calendar grid shows time slots from 10:00am to 12:00pm. A 'Create Meeting +' button is located in the top right of the calendar area. At the bottom right of the page, there is a 'Support' button.

If you'd like to view your Company Showroom from an attendee view, navigate to your personal profile, by clicking "Profile" to right. Then, at the top of the page, click "View Profile". This will bring you to your personal profile, and from there you can click on your company showroom.

Your company information would have been pulled from your Exhibitor Profile, but please make sure the information is correct.

Teams | PRODUCTS

- To edit or add Products, click "**My Team**" at the top-right. Then, click "**Products**" on the left navigation bar.
- Edit each individual field, then click "**Update Profile**" at the bottom of the page.

CLARION EVENTS

Meetings | Inbound Leads | Company Chat | Contacts | Team Members | Company Profile | **Product** | Export

Product

Add Product



You can add or edit products here. To edit a product, click the "gear" icon next to the product image.

Teams | INBOUND LEADS

- To view your Inbound Leads click "**My Team**" at the top-right. Then, click "**Inbound Leads**" on the left navigation bar.

The screenshot shows the Microsoft Teams interface for 'CLARION EVENTS'. At the top, there is a search bar with the placeholder text 'Search for people, products or other items'. Below the search bar, the 'CLARION EVENTS' header is visible, followed by a navigation menu with tabs for 'Meetings', 'Inbound Leads', 'Company Chat', 'Contacts', 'Team Members', 'Company Profile', 'Product', and 'Export'. The 'Inbound Leads' tab is currently selected. The main content area is titled 'Inbound Leads' and includes a brief description: 'The Inbound Leads section features profiles of people that have shown interest, connected or interacted with you, your team members and/or company profile. The section is dynamic, as the profiles will remain on the list until you take action on them by requesting a meeting, showing interest or skipping the profile.' Below this description are three summary cards: '1 To Review' (with a red icon), '1 Reviewed' (with a green checkmark icon), and '2 Total Leads' (with a blue icon). A detailed profile card for 'Abby Buyer' is shown below, with status indicators 'Interested in you' and 'Viewed by you'. At the bottom of the profile card, there are three buttons: 'View Lead Notes', 'Chat', and 'Request a meeting'.

Inbound Leads is your "short-list" of anyone who has view your profile or your company showroom.

Export and Print Your Meetings

- Click on your **"Profile"**, then locate the Export Meetings box on the left navigation bar
 - **Export Meetings:** Easily export and PRINT your ACCEPTED meetings as a .CSV or a .XLSX

The screenshot shows a user profile page. On the left, there is a navigation menu with the following items: **Edit Profile** (highlighted with a blue box and an arrow), Manage My Availability, Account Settings, User Feedback, Help Center, Privacy Policy, Terms & Conditions, About Grip, and Sign Out. The main content area is titled **Edit Profile** and includes a profile picture, first name (Cameron), last name (Litcher), and headline (Sr. Audience Engagement Coordinator at Clarion Events). Below this is the **Contact Details** section, which includes fields for Email (cameron.litcher@clarionevents.com), Phone Number, and Visibility (Private). At the bottom, there is a **GET THE APP** section with a button to **Copy the App Link**. On the right side, there is a user menu with the following options: **Edit Profile** (highlighted with a blue arrow), Manage My Availability, Search, Account Settings, User Feedback, Help Center, Privacy Policy, Terms & Conditions, About Grip, and Sign Out.