



# Meeting Portal Guide



**GIFT &  
SOUVENIR** GROUP

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

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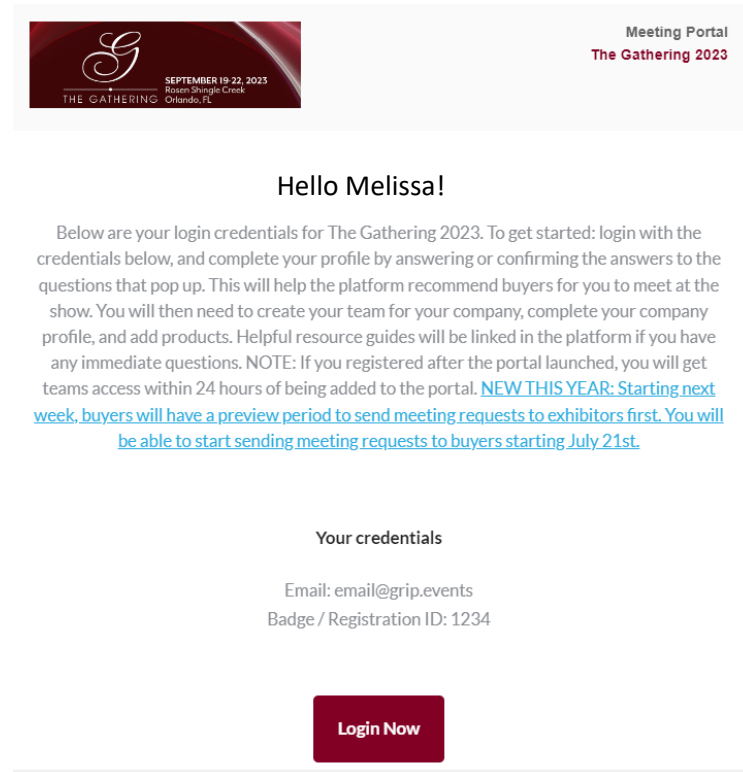
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# LOGIN

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

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

cameron.litcher@clarionevents.com

Login



## Enter the Badge ID

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 displays a web application interface with a modal dialog for profile completion. The modal features a progress bar at the top and a list of fields to be updated: Website, LinkedIn Profile, Main Product Categories Provided, and Sub Product Categories Provided. Each field has a 'Click to update' link and a '0' indicator. A 'Next >' button is located at the bottom of the modal. In the background, the user's profile picture is circled in red, with a line connecting it to a larger red circle containing a person icon and the word '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 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.

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

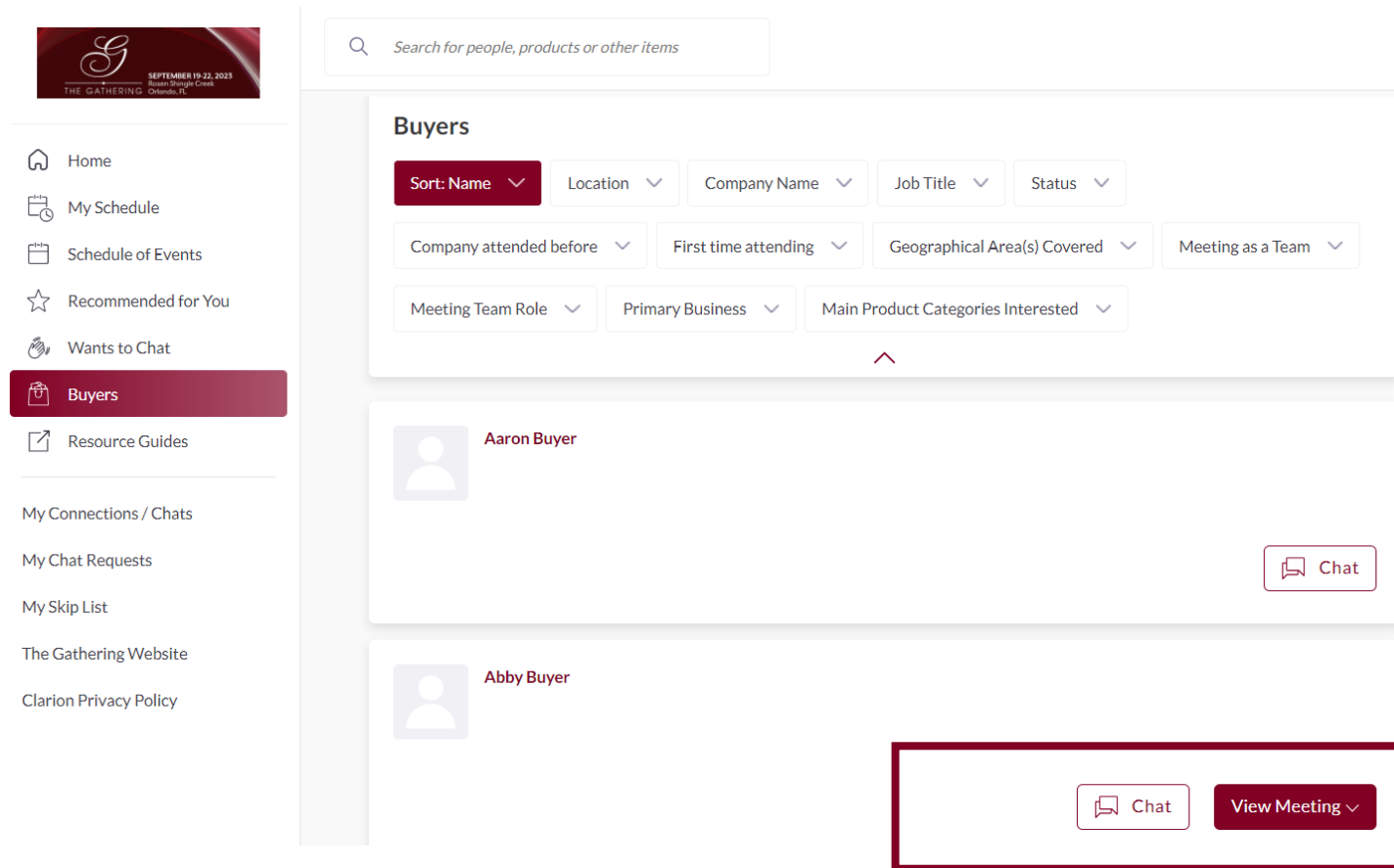
The screenshot displays the 'Manage My Availability' interface. On the left, a sidebar contains navigation links: 'Edit Profile', 'Manage My Availability' (highlighted), 'Account Settings', 'Export', and a 'MORE' section with links to 'User Feedback', 'Help Center', 'Privacy Policy', 'Terms & Conditions', 'About Grip', and 'Sign Out'. Below this is a 'GET THE APP' section with a 'Copy the App Link' button. The main content area includes a search bar at the top, a description of the availability feature, a 'Range of daily availability' section with a time range selector (12:00am to Midnight) and a 'Reset availability' link, and an 'Event Days' table. The table lists days from Tuesday to Friday, with checkboxes for availability and links to 'Edit Availability'. The right sidebar shows a 'Connections' list with user profiles and a 'Support' button at the bottom.

| Event Days   | Edit Availability                 |
|--|-----------------------------------|
| <input checked="" type="checkbox"/> Tuesday - September 19<br>Add time ranges when you <b>won't</b> be available during the day.<br>from 9:00am to 11:00am | Done                              |
| <input type="checkbox"/> Wednesday - September 20<br>Unavailable for the entire day  | <a href="#">Edit Availability</a> |
| <input checked="" type="checkbox"/> Thursday - September 21  | <a href="#">Edit Availability</a> |
| <input checked="" type="checkbox"/> Friday - September 22  | <a href="#">Edit Availability</a> |

***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.



You can take the following actions on event participants:

- **Skip:** you are not interested in this person
- **Chat / 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 "Showing Interest" you can include a personal message by clicking the arrow in the box next to "Show Interest".*

# 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 'Request a meeting' form. The profile includes contact information, activity logs, and details about the user's role. The form allows selecting invitees, dates, times, and locations, and includes a text area for a personal message.

**Abby Buyer** Buyer  
sdljfa@asdlkfja.com N/A

View Lead Notes Chat

**Lead Activity** 4

Has requested a meeting with Nadira Interested in Nadira Has viewed Nadira Has viewed Caitlin

**Team Member Activity** 0

**Details**

**Meeting Team Role**

Primary meeting contact

**Meeting as a Team**

No; I will attend meetings individually

**Meetings with Abby Buyer** View As: Cameron Litcher

**+ Request a meeting**

Invitees  
Abby Buyer

Date  
Wednesday 09/20/2023

Time  
10:30am - 12:00pm

Location  
Clarion Test (90 minute meeting)

**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 **9:30 AM – 10:00 AM** OR **9:30 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

SEPTEMBER 19-22, 2023  
THE GATHERING ONLINE

Search for people, products or other items

Home

**My Schedule**

Schedule of Events

Recommended for You

Wants to Chat

Buyers

Resource Guides

My Connections / Chats

My Chat Requests

My Skip List

The Gathering Website

Clarion Privacy Policy

Tuesday September 19

+ Load previous sessions

10:00am - 11:00am Meeting In-person Meeting Awaiting Response

Clarion Test (60 minute meeting)

Cameron Litcher Abby Buyer

Clarion Ev...

Cancel Reschedule

Wednesday September 20

10:30am - 12:00pm Meeting In-person Meeting Pending

Clarion Test (90 minute meeting)

Abby Buyer Cameron Litcher

Clarion Ev...

Decline Reschedule Message Organizer Accept

## 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 'CLARION EVENTS' company profile page. At the top, there's a navigation bar with 'Meetings', 'Inbound Leads', 'Company Chat', 'Contacts', 'Team Members', 'Company Profile' (highlighted), 'Product', and 'Export'. Below this, the profile details are listed with 'Click to update' links for each field:

- Name: CLARION EVENTS
- Headline: The Gathering 2023
- Address: Click to update
- Embedded Video URL: Click to update
- LinkedIn Profile: Click to update
- Phone / Mobile: Click to update
- City: Click to update
- State / Province: Click to update
- Country: Click to update
- Zip / Postal Code: Click to update

At the top right of the page, there are icons for home, notifications (1), 'My Team', and a user profile dropdown.

*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.

The screenshot shows the 'CLARION EVENTS' dashboard. At the top, there is a search bar and navigation icons. Below the dashboard title, a horizontal menu includes 'Meetings', 'Inbound Leads', 'Company Chat', 'Contacts', 'Team Members', 'Company Profile', 'Product' (which is highlighted with a red underline), and 'Export'. The main content area is titled 'Product' and features a large white card with the 'CLARION EVENTS' logo and the text 'The Gathering Meeting Portal'. A small gear icon is located in the top right corner of this card. To the right of the card is a red 'Add Product' button. On the far right, there is a vertical sidebar with a back arrow and a user profile icon. A red-bordered text box is overlaid on the right side of the interface.

Product

Add Product

CLARION EVENTS

The Gathering Meeting Portal

*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 'CLARION EVENTS' dashboard. At the top, there's a search bar and navigation icons. The 'Inbound Leads' section is active, showing a summary of leads: 2 To Review, 1 Reviewed, and 3 Total Leads. Below this, a lead profile for Natalie Pollan is displayed, including her title, location, and a note that she has viewed the meeting portal. Action buttons for 'View Lead Notes', 'Request to Chat', and 'Request a meeting' are visible at the bottom of the lead profile.

CLARION EVENTS

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

### Inbound Leads

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.

2 To Review

1 Reviewed

3 Total Leads

**Natalie Pollan** Austin, TX  
Director of Retail and Visitors Services - Visit Austin

Has viewed The Gathering Meeting Portal

View Lead Notes Request to Chat 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

