



## MOBILE APP & WEB PLATFORM RESOURCE GUIDE

# TABLE OF CONTENTS

Login, Web Platform	3
Login, Mobile App	4
Onboarding	5
Edit Profile	6
Calendar Availability	7
Event Agenda	8
Calendar Sync	9
Push Notifications	10
Browse & Filter	11
Meetings, Requesting	12
Meetings, Accepting	13

Meetings, Unintentional Decline	14
Export Contacts	15
SPONSORS ONLY	
My Team Dashboard	16
Company Profile*	17
Team Members*	18
Leads*	19
Lead Qualification*	20
Meetings, Request for Team Members*	21
Meetings, Accept for Team Members*	22
Export Team Contacts*	23


# LOGIN

## WEB PLATFORM

Navigate to the [web platform](#) and click “**Login**” to access. Your badge ID was provided to you when you initially registered for the event. If you have already logged in via the mobile app, you will just need your email address and password to access the web platform.

To reset your password, click "Request a reminder" on the login page.


1



Welcome to DTECH Data Centers and AI. Please log in below to get started.

Login

2




Enter Your Email

Enter the email address you provided when you registered for DTECH Data Centers and AI.

Email

Login

3



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](#)

# LOGIN

## MOBILE APP

Download the mobile app from your app store, then click “**Login**” to access. Your badge ID was provided to you when you initially registered for the event. If you have already logged in via the web platform, you will just need your email address and password to access the mobile app.

**To reset your password, click "Request a reminder" on the login page.**

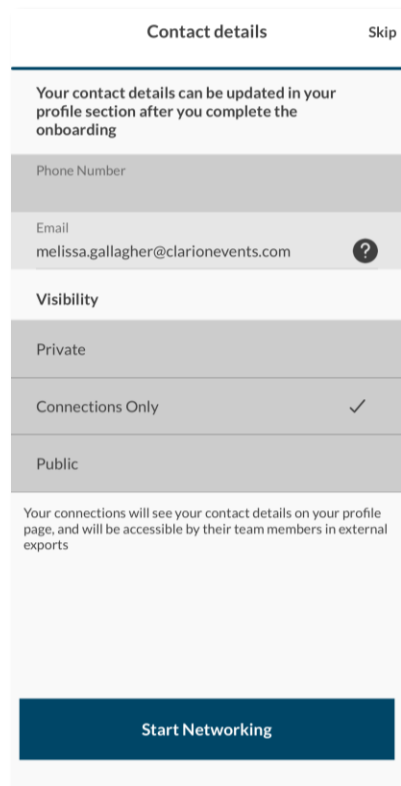
The image displays three sequential mobile app screens for the DTECH mobile application. Each screen features a DTECH logo at the top left and a help icon (question mark in a circle) at the top right.

- Screen 1: Enter Your Email**  
The screen prompts the user to "Enter the email address you provided when you registered for DTECH Events." It includes a text input field with the placeholder "Enter Your Email" and a blue "Login" button at the bottom.
- Screen 2: Enter the Badge ID**  
The screen prompts the user to "Enter the Badge ID you received in your welcome email when you registered for the event." It includes a text input field with the placeholder "Badge ID / Registration ID". Below the input field, there is a link that says "Don't know your badge ID? Request a reminder". A blue "Claim Account" button is at the bottom.
- Screen 3: Success!**  
The screen displays a "Success!" message: "Please create a password for your account and use this password the next time you log in." It features two text input fields: "Password" and "Confirm Password", each with a toggle icon for visibility. Below these fields, a note states "Password must be at least 6 characters long". A blue "Create Account" button is at the bottom.

# ONBOARDING

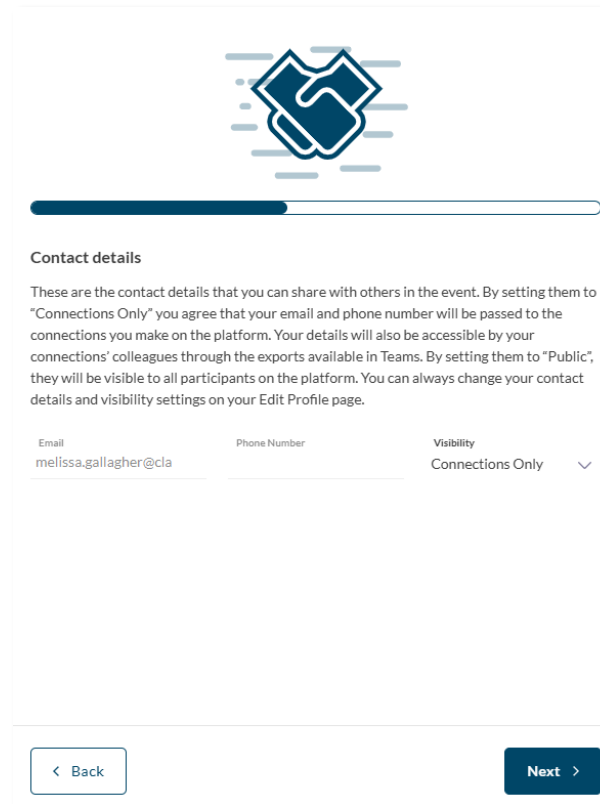
During onboarding, you'll be asked to confirm your registration information. This will help recommend profiles to meet with. You will also be asked to confirm how you'd like your contact information to appear in the platform. **The platform will default to "Connections Only".**

## MOBILE APP



The mobile app screen displays a 'Contact details' form. At the top, there's a 'Skip' link. Below it, a message states: 'Your contact details can be updated in your profile section after you complete the onboarding'. The form includes fields for 'Phone Number' and 'Email' (pre-filled with 'melissa.gallagher@clarionevents.com' and a question mark icon). Under the 'Visibility' section, three options are listed: 'Private', 'Connections Only' (which is selected with a checkmark), and 'Public'. A note at the bottom explains: 'Your connections will see your contact details on your profile page, and will be accessible by their team members in external exports'. A 'Start Networking' button is at the very bottom.

## WEB PLATFORM



The web platform screen features a large icon of two interlocking puzzle pieces at the top. Below it is a progress bar. The 'Contact details' section contains an explanatory paragraph: 'These are the contact details that you can share with others in the event. By setting them to "Connections Only" you agree that your email and phone number will be passed to the connections you make on the platform. Your details will also be accessible by your connections' colleagues through the exports available in Teams. By setting them to "Public", they will be visible to all participants on the platform. You can always change your contact details and visibility settings on your Edit Profile page.' Below this, there are input fields for 'Email' (pre-filled with 'melissa.gallagher@cla') and 'Phone Number'. To the right, a 'Visibility' dropdown menu is set to 'Connections Only'. Navigation buttons for '< Back' and 'Next >' are at the bottom.

## CONTACT SHARING OPTIONS

### PRIVATE

No one can see your contact details

### CONNECTIONS ONLY

Participants you've connected with will be able to see your contact details on your profile page, as well as in external exports from the platform

### PUBLIC

Contact Details will be displayed on your profile page and available in exports for everyone at the event

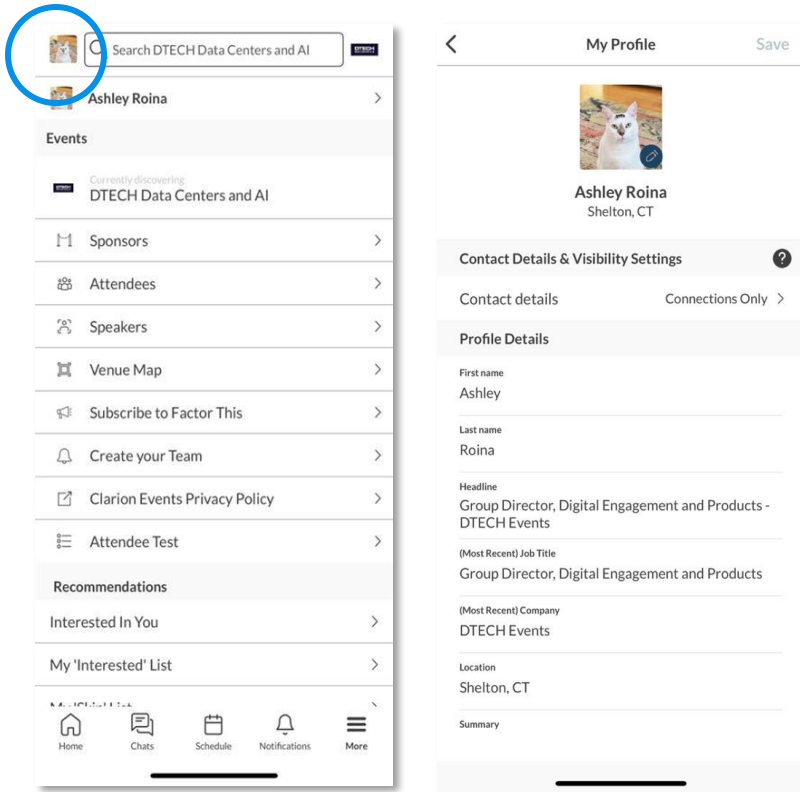


# EDIT PROFILE

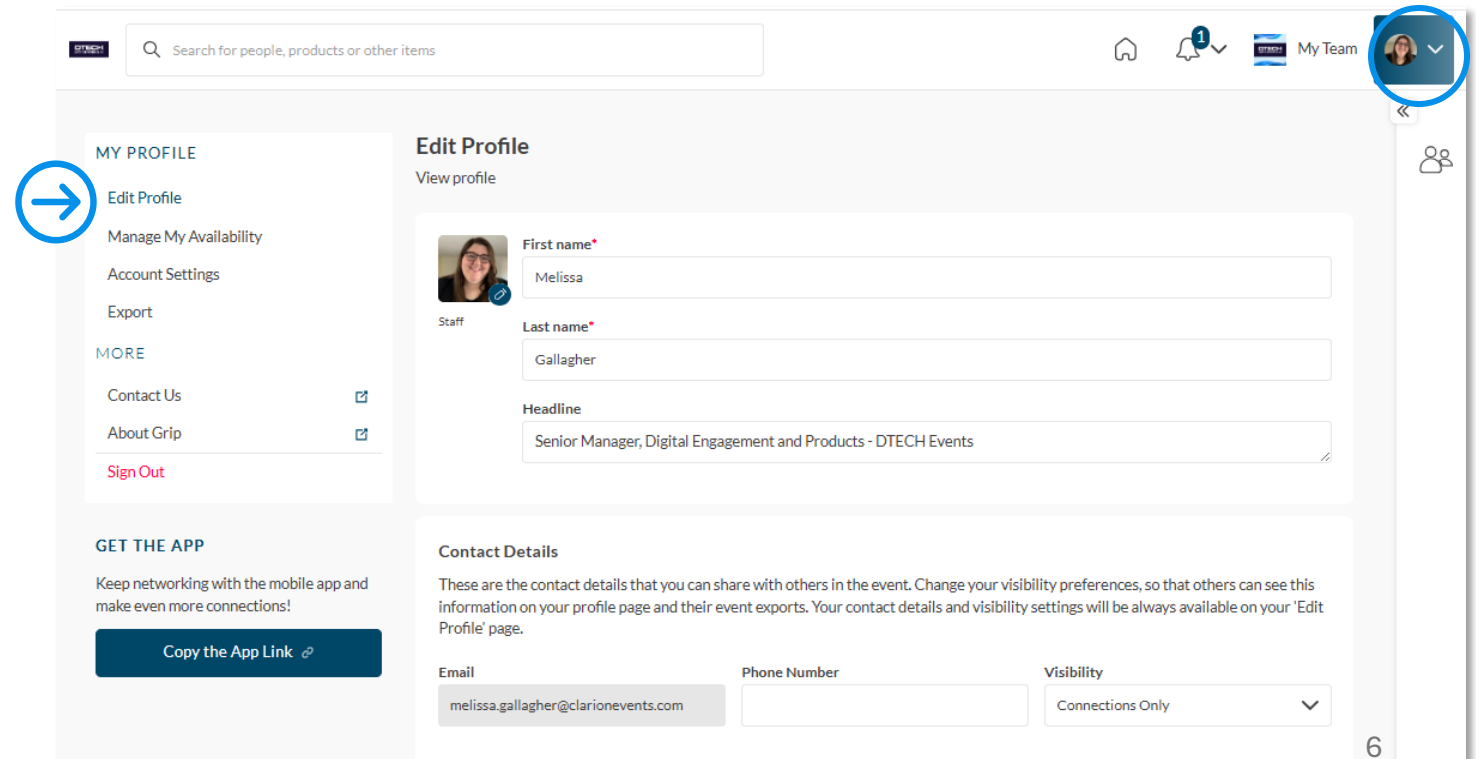
You can edit your profile at any time through both the mobile app and the web platform.

To edit via the web platform, click the icon at the **top right** of the home page. To edit via the mobile app, click the icon at the **top left** of the home page.

## MOBILE APP



## WEB PLATFORM



# CALENDAR AVAILABILITY

To make yourself unavailable for meetings, either for a specific time block or day, you can manage your availability through the web platform.

**Via the web platform**, click “Profile”, “Manage My Availability”, the “Edit Availability”. Adjust the times your unavailable to meet for each day.

The screenshot shows the 'Manage My Availability' page. A blue arrow points to the 'Manage My Availability' link in the left sidebar under 'MY PROFILE'. Another blue circle highlights the user profile icon in the top right corner, which has a dropdown menu open showing options: 'Edit Profile', 'Manage My Availability', 'Account Settings', 'Export', 'Contact Us', 'About Grip', and 'Sign Out'. The main content area is titled 'Manage My Availability' and contains instructions on how to set availability. Below the instructions, there is a section for 'Range of daily availability' with a dropdown menu set to '12:00am' and another set to 'Midnight'. A 'Reset availability' link is visible. At the bottom, there is a table with columns 'Event Days' and 'Edit Availability'. The table lists three days: Tuesday - 27 May, Wednesday - 28 May, and Thursday - 29 May, each with an edit icon. A 'Save Changes' button is at the bottom right.

Search for people, products or other items

MY PROFILE

- Edit Profile
- Manage My Availability
- Account Settings
- Export

MORE

- Contact Us
- About Grip
- Sign Out

GET THE APP

Keep networking with the mobile app and make even more connections!

Copy the App Link

### 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 customise 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 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](#)

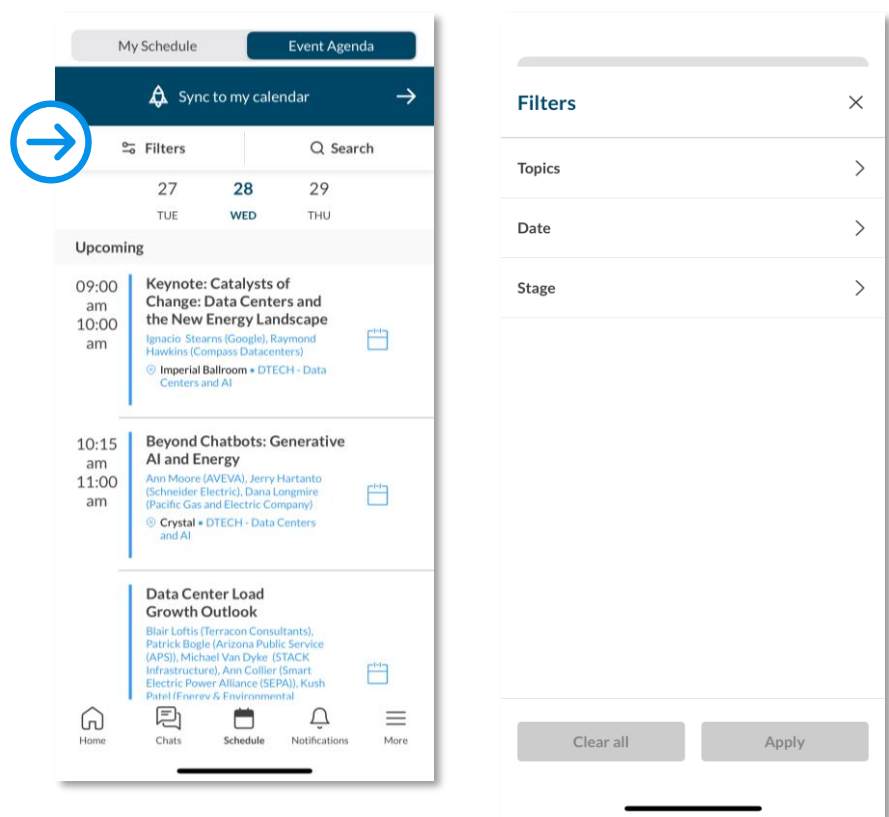
Event Days	Edit Availability
Tuesday - 27 May	
Wednesday - 28 May	
Thursday - 29 May	

Save Changes

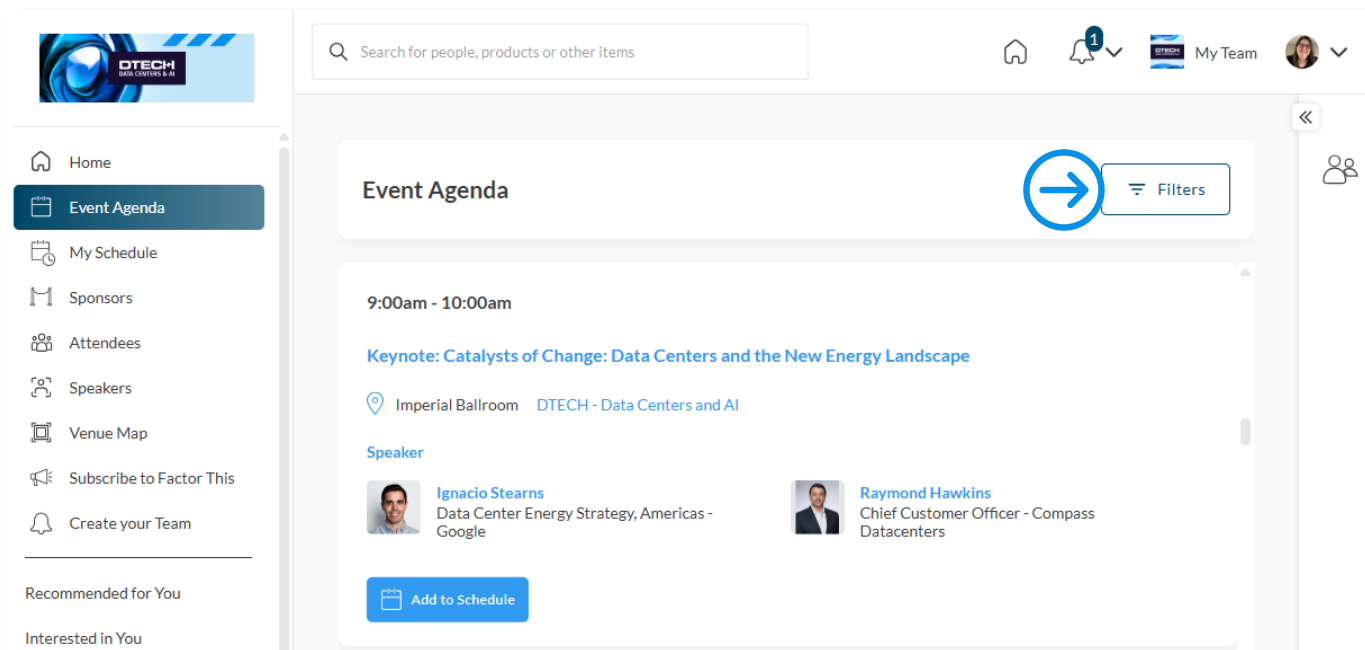
# EVENT AGENDA

Tailor your event experience by adding sessions to your calendar. Filter the agenda by topics, location (stage), date. “Add to Schedule” or use the calendar icon to add a session to your calendar.

## MOBILE APP



## WEB PLATFORM

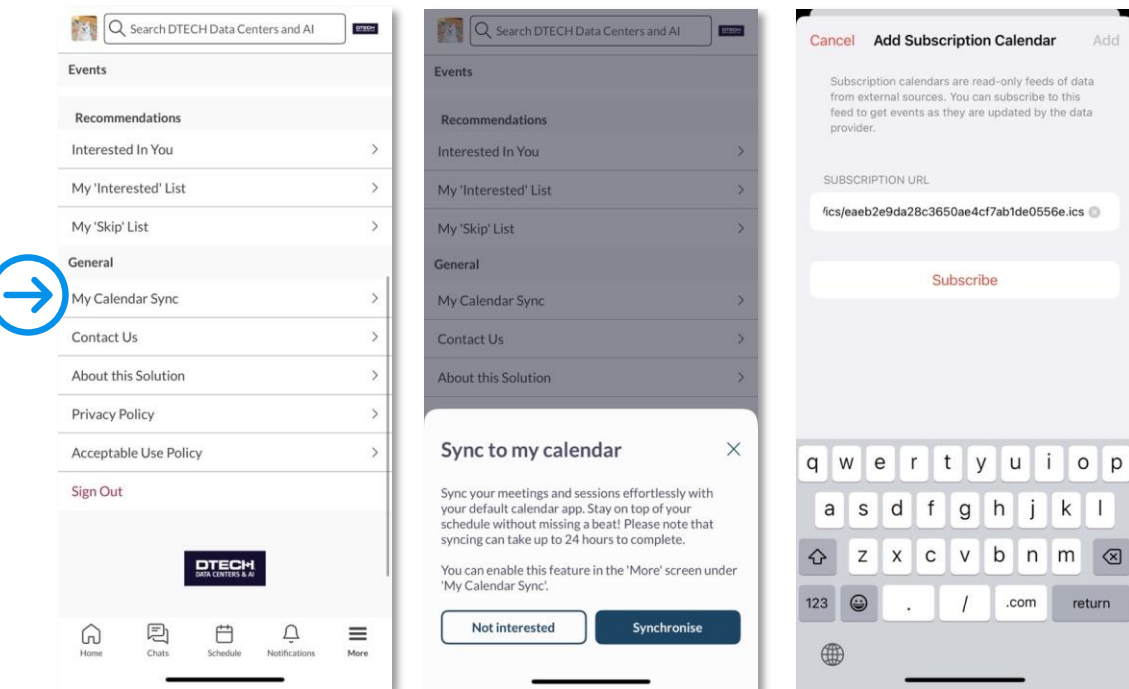




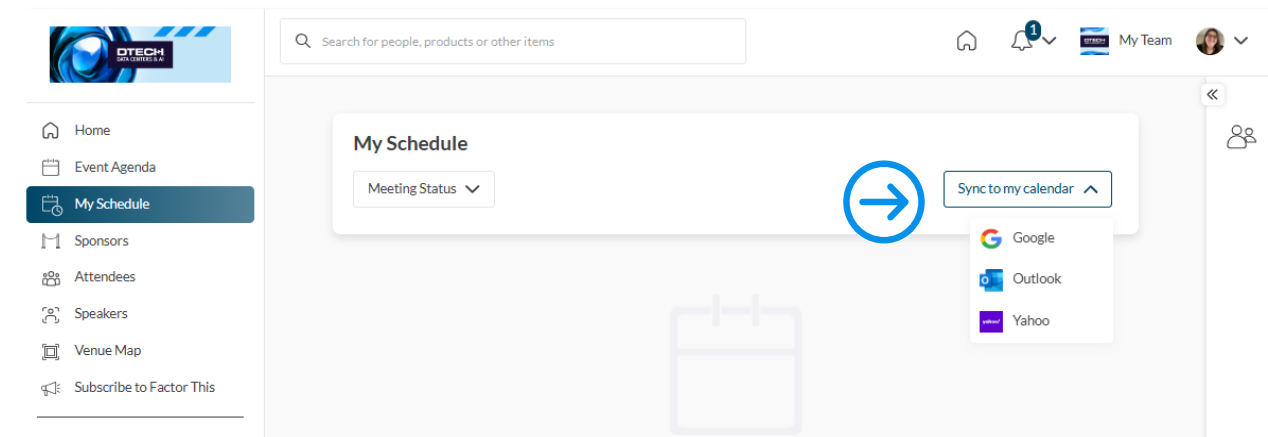
# CALENDAR SYNC

[Sync your calendar](#) (confirmed meetings and registered sessions) automatically to your device. On the web platform, click “My Schedule”, then “**Sync to my Calendar**”. On mobile, from either the Event Agenda, or the “More” list click “**My Calendar Sync**”. Follow the instructions to add the Calendar to your device.

## MOBILE APP

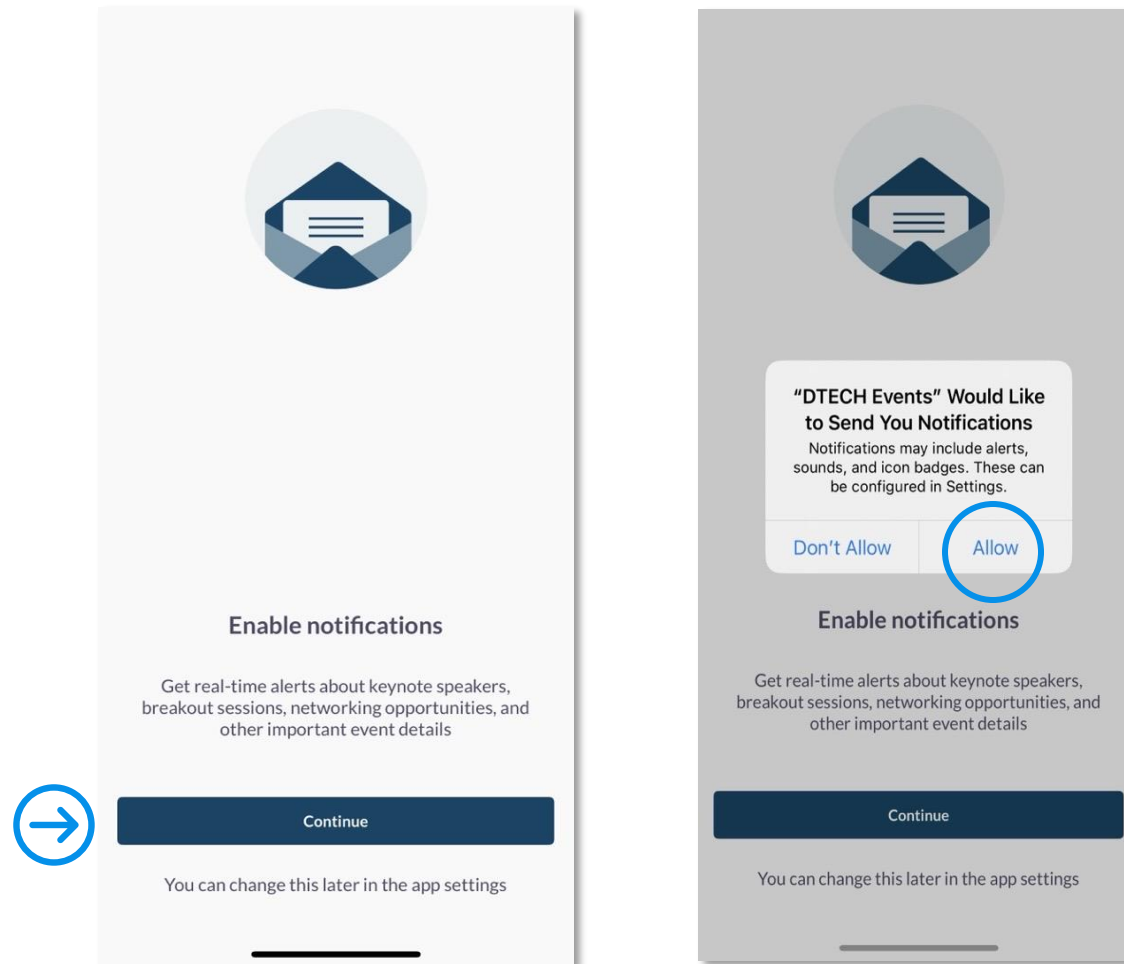


## WEB PLATFORM



# PUSH NOTIFICATIONS

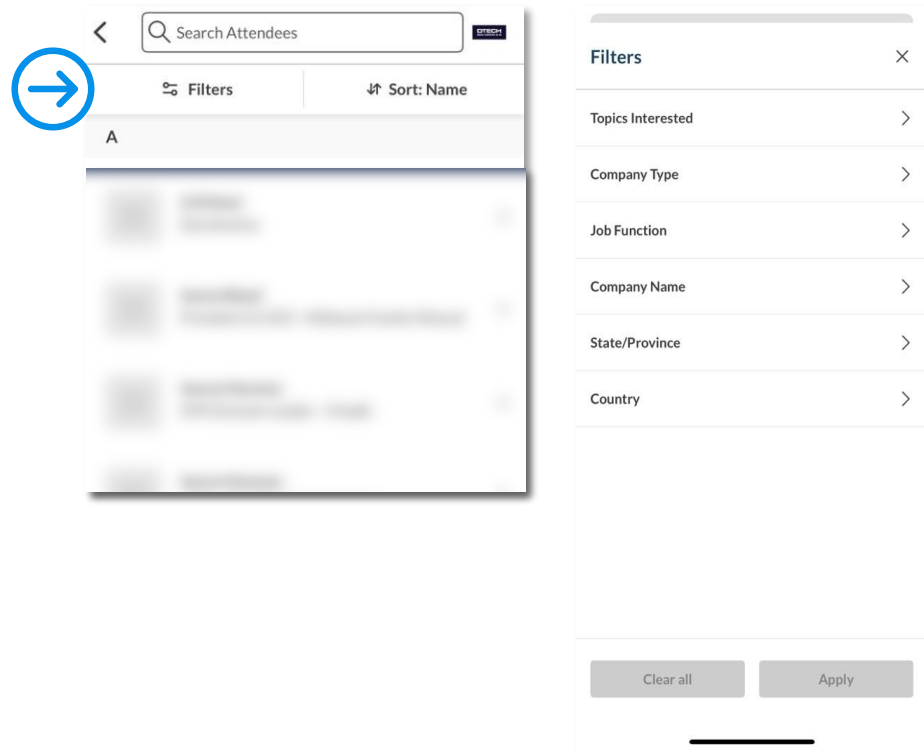
Stay informed while at the show by enabling push notifications to your device. Using the mobile app, click "**Notifications**" at the bottom, then "**Turn on Notifications**". A box will pop-up asking you to "Allow" notifications on your device.



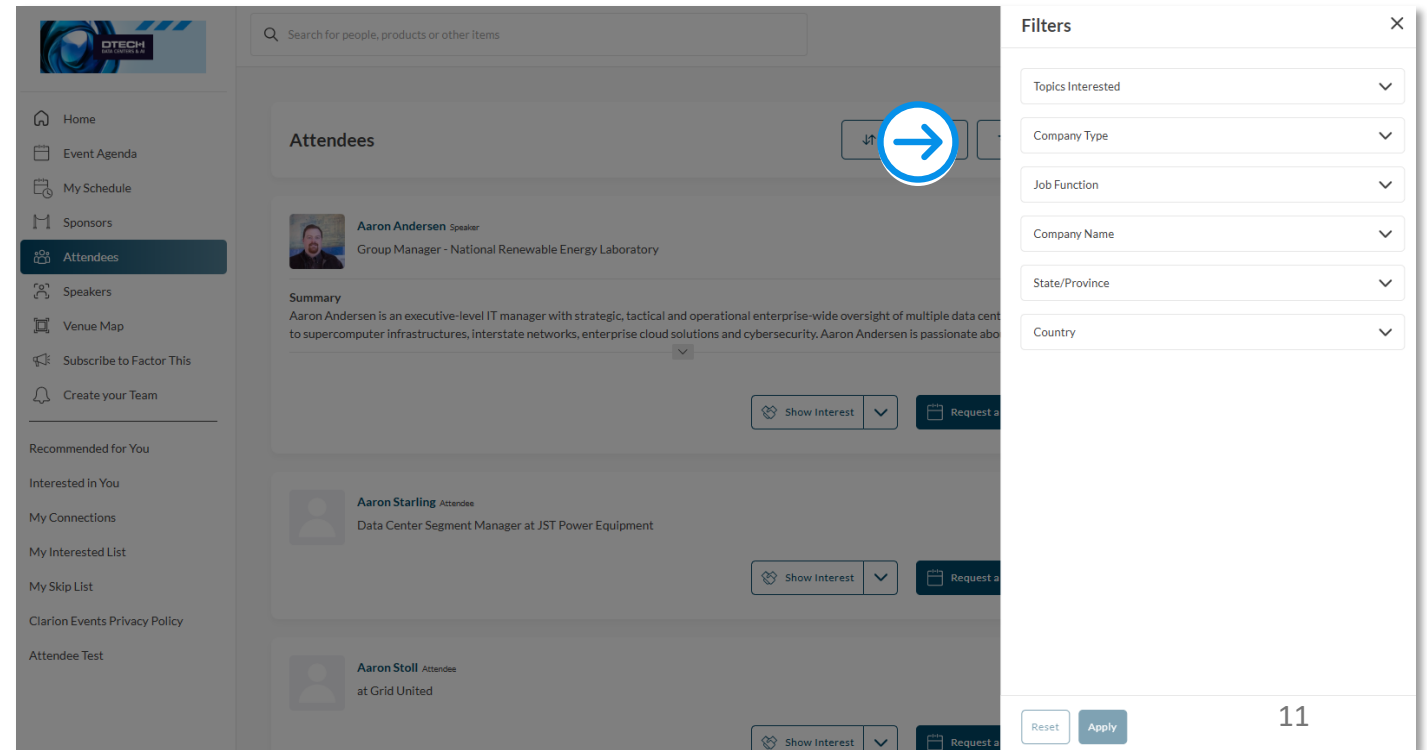
# BROWSE & FILTER

To browse for people or companies to connect with, you can click any list from the home page ("Attendees", "Sponsors", etc.) and **filter** the list. Check "**Recommended for You**" often to see the names the recommendations from the platform (the more actions you take the in the platform, the more tailored the recommendations will be!).

## MOBILE APP



## WEB PLATFORM

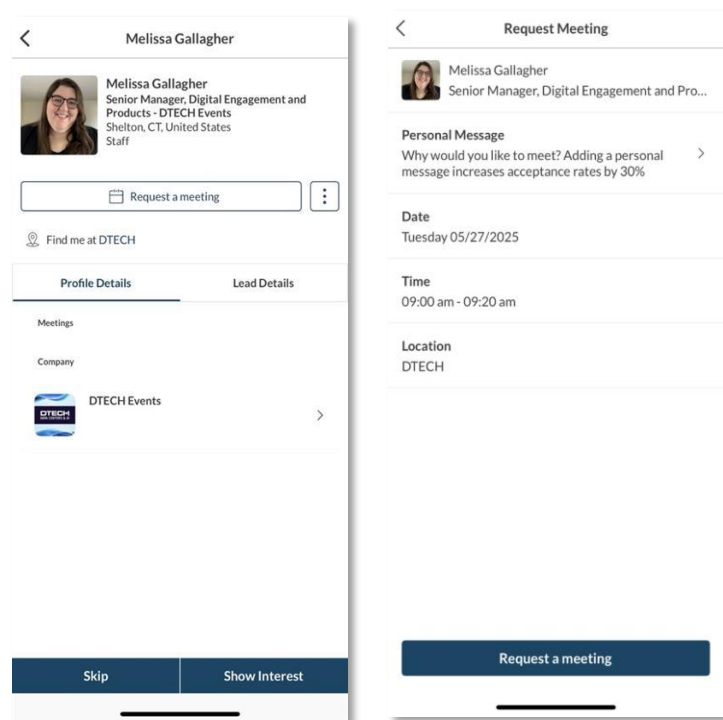


# MEETINGS

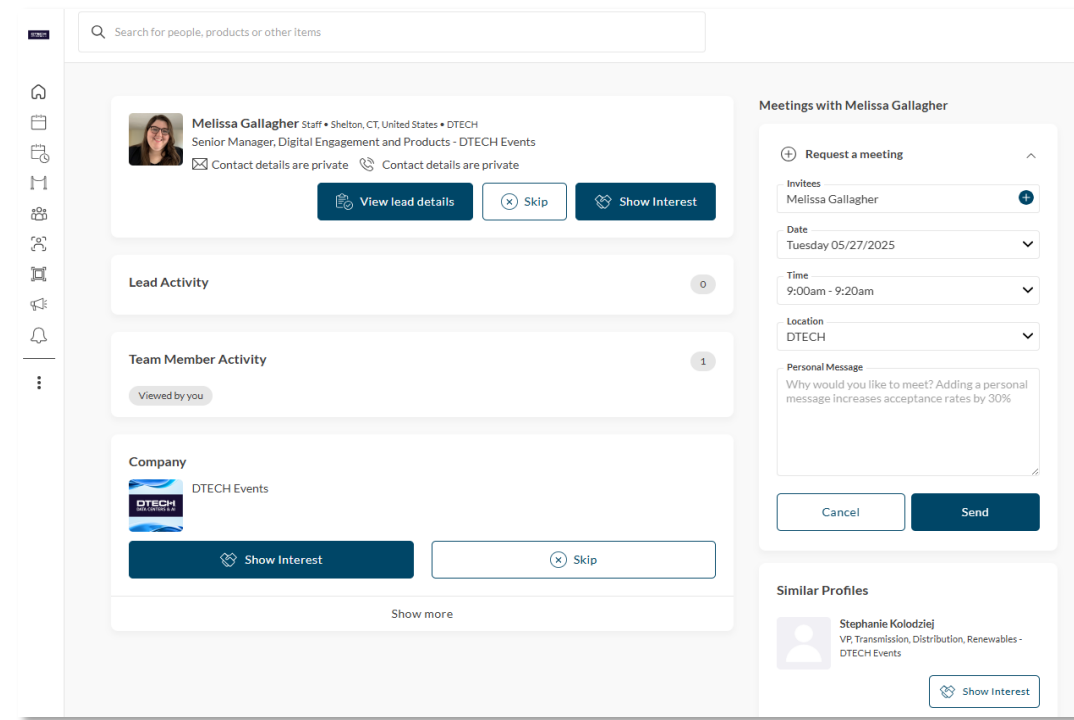
## REQUESTING

Once you find someone you would like to meet with, click “**Request Meeting**” next to their name. Add the date/time and location, as well as a personal message, then click “**Request Meeting**”. They will receive an email/push notification that they received a meeting request. Once a meeting is confirmed, you will receive a notification.

## MOBILE APP



## WEB PLATFORM

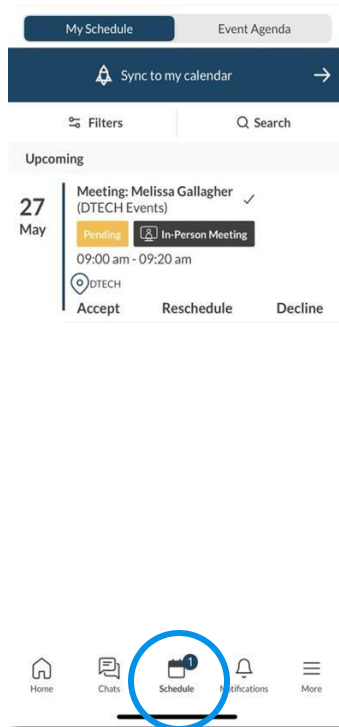


# MEETINGS

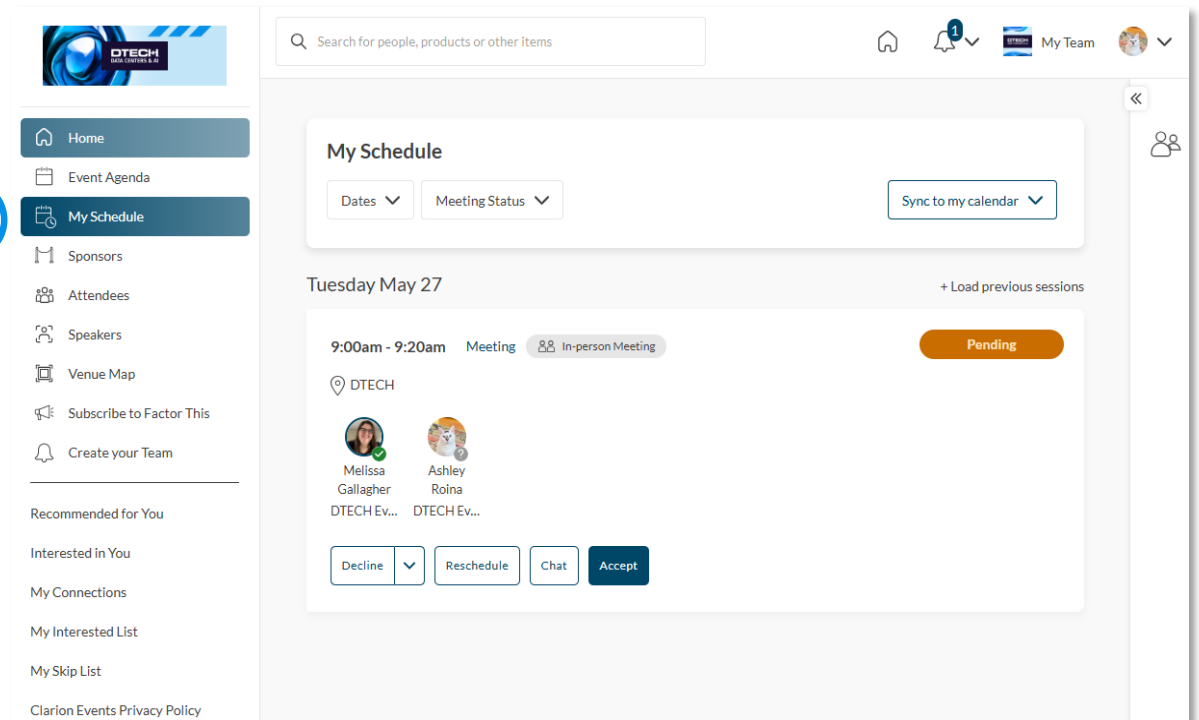
## ACCEPTING

If someone sends you a meeting request, you will receive an email/push notification with the meeting details. You can confirm via the “Accept Meeting” in the email or via the app. To filter your full list of meetings, click “**My Schedule**”, then “**Meeting Status**” or “**Filter**” to filter on pending meetings.

### MOBILE APP



### WEB PLATFORM





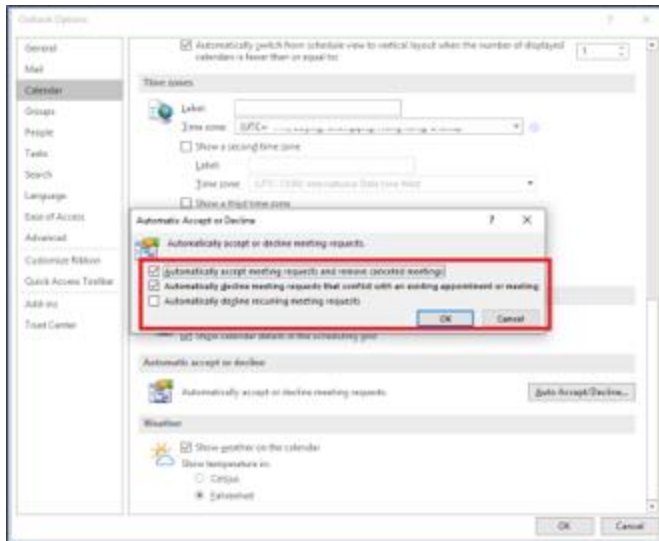
# MEETINGS

## UNINTENTIONAL DECLINE

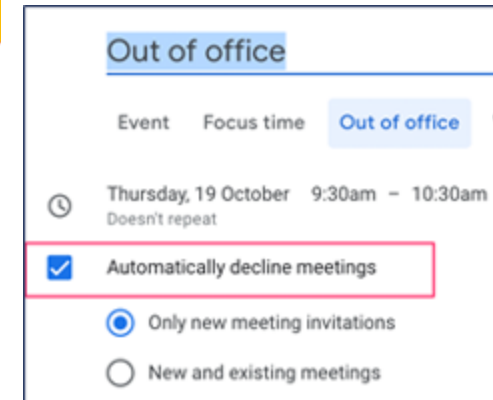
If you are finding that your meetings are auto-declining, it may be your Out of Office. Some calendars include the option to auto-decline meetings while an Out of Office is enabled. Make sure this is turned off, or your meetings scheduled through the mobile app will be declined.



### OUTLOOK



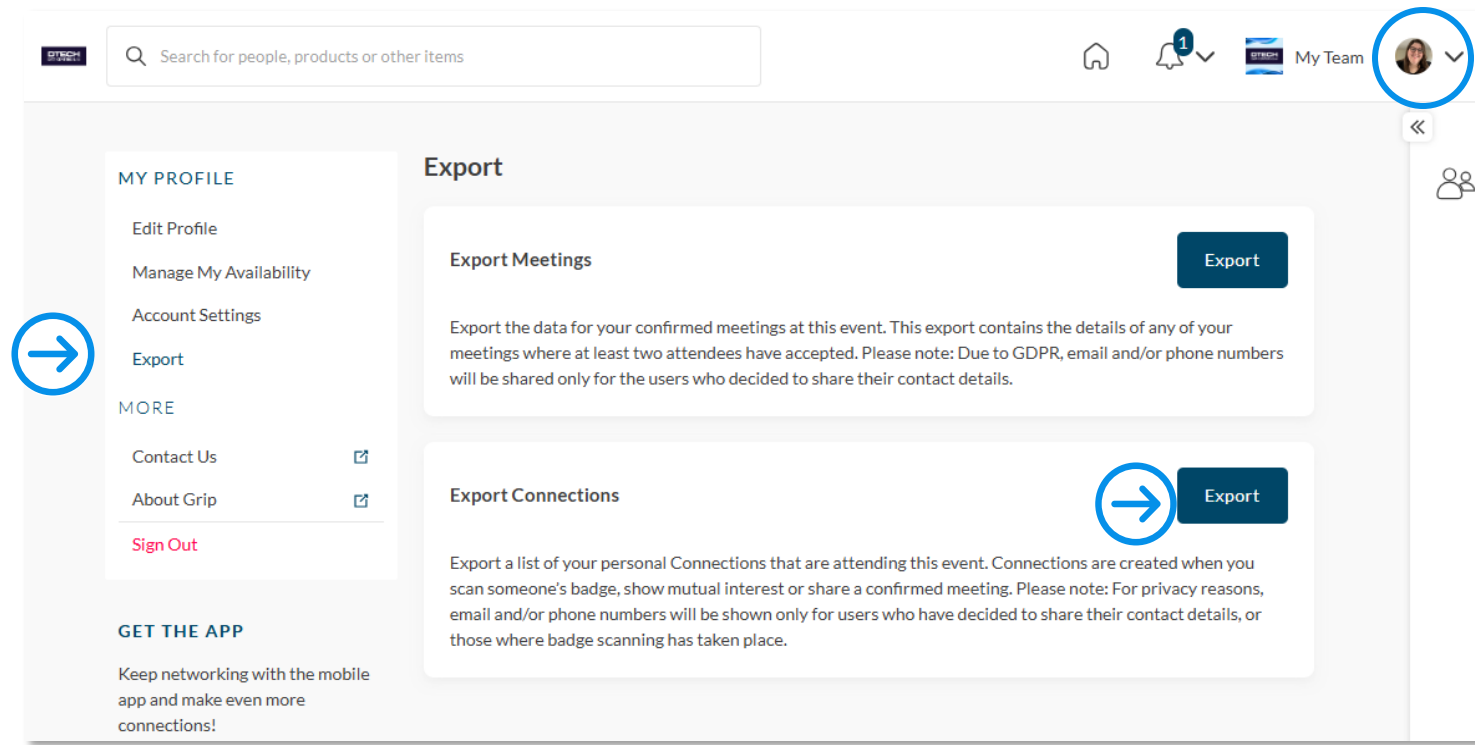
### GOOGLE



# EXPORT CONTACTS

From the web platform, you can export a list of all your connections – anyone you’ve connected with through the platform or had a meeting with – into an .csv file by going to “Edit Profile” then “Export.”

**Due to GDPR email and/or phone numbers will be shared only for the users who decided to share their contact details.**



NOTE: Sponsors, or anyone tied to a “Team”, can download the connections from everyone on their team. Learn more on how to download the connections from your team under the “Export” tab in your Teams Dashboard.



# MY TEAM DASHBOARD

## SPONSORS ONLY

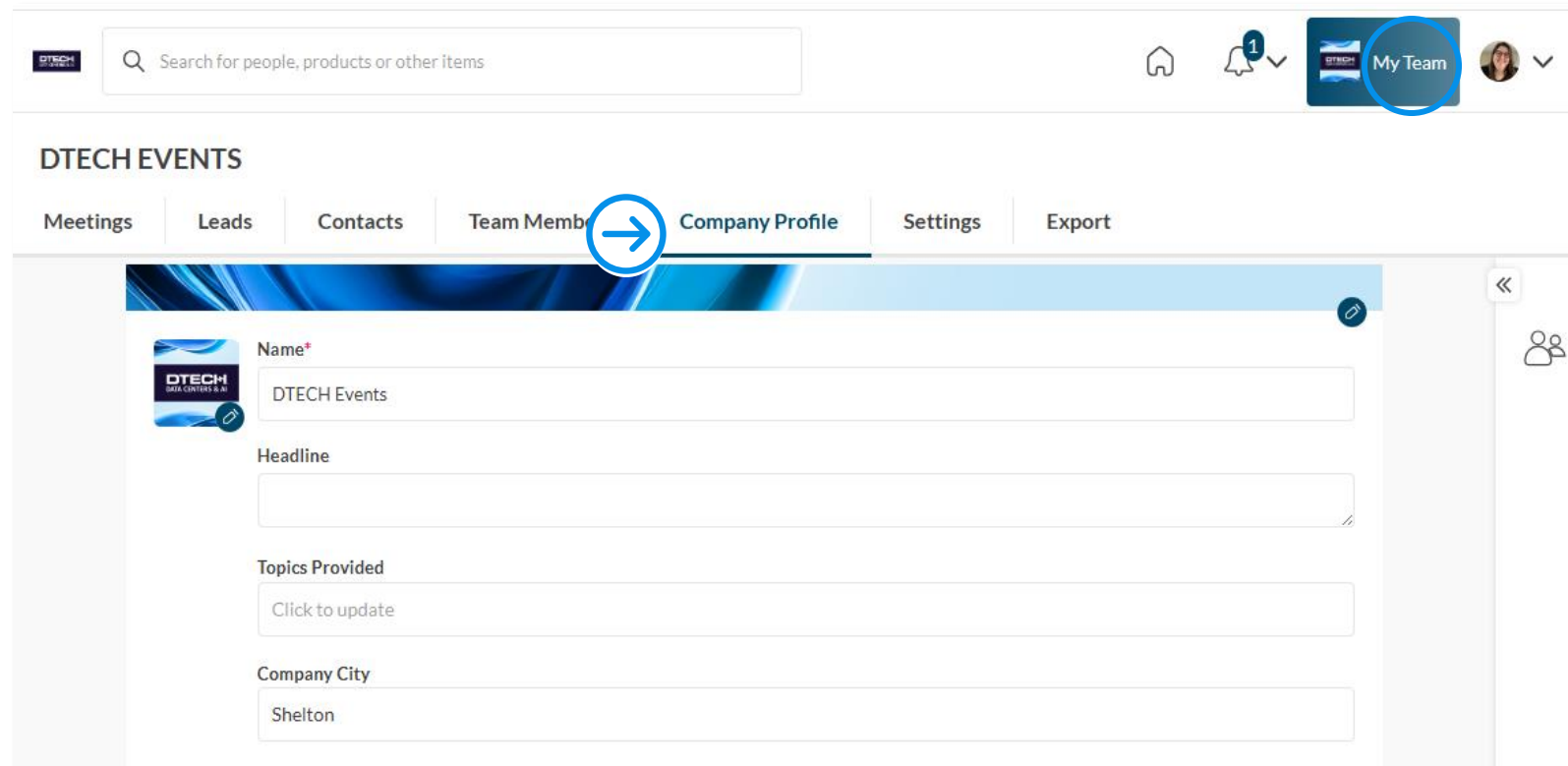
As a Sponsor, you and your team have access to the “Teams” dashboard, only accessible via the web platform (top-right). From here, you can edit your company profile, manage meetings for your team members, view your Inbound Leads, and export the contacts for your entire team.

The first person to sign in via the web platform will create your team and become the admin for the team.

For issues or questions on creating your team, please contact: [mobileapps@clarionevents.com](mailto:mobileapps@clarionevents.com), and we will be happy to help!

# EDIT COMPANY PROFILE\*

In “**My Team**”, click “**Company Profile**” to edit your company profile with Topics, Company Description, Logo, etc. Ensuring your profile is filled out completely will help event participants when searching and filtering the Sponsor list. Once complete, click “**Update Profile**” at the bottom of the page. View our [Sponsor Checklist](#) to see what we recommend adding to your company profile.

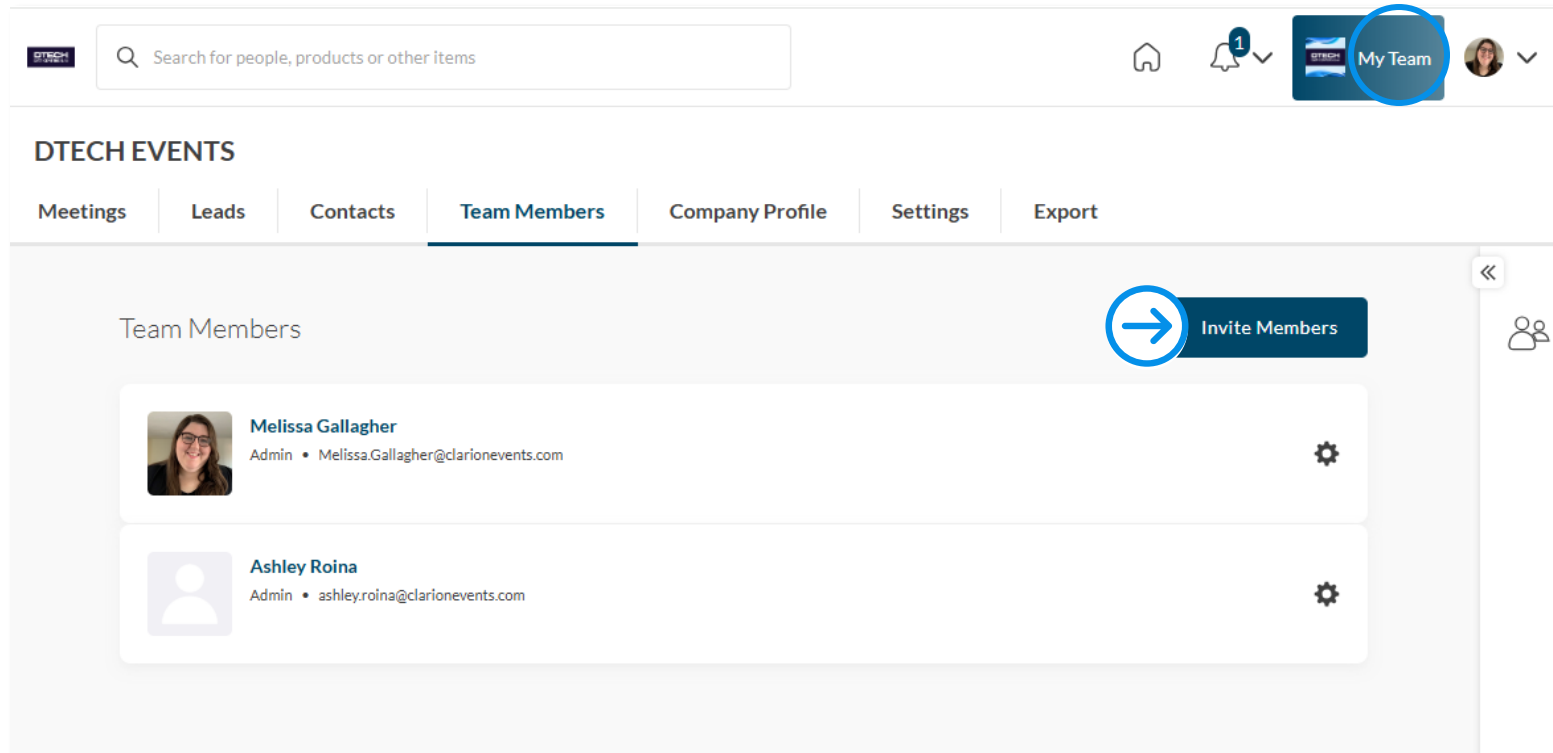


The screenshot shows the 'DTECH EVENTS' interface. At the top, there is a search bar and a 'My Team' button. Below this, a navigation bar contains tabs for 'Meetings', 'Leads', 'Contacts', 'Team Members', 'Company Profile', 'Settings', and 'Export'. The 'Company Profile' tab is selected, indicated by a blue circle and an arrow. The main content area displays a form for editing the company profile. The form includes a 'Name' field with the value 'DTECH Events', a 'Headline' field, a 'Topics Provided' field with a 'Click to update' button, and a 'Company City' field with the value 'Shelton'. A blue circle highlights the 'Company Profile' tab in the navigation bar.

NOTE: Cover photos may be added, however they will only appear on the web platform. Specs: 1476 x 634px, 500kb

# TEAM MEMBERS\*

The first person from your company to login will create your team and be designated the "**Admin**". To invite team members to join your team, click "Team Members", then "Invite Members". Search for the participant by first and last name. They will receive an email requesting they join your team\*\*.



## ACCESS LEVELS

### ADMIN

- Edit Company Profile
- Access Inbound Leads
- Export Connections (contacts) for entire team
- Request or Accept Meeting Requests on behalf of other team members
- Edit Team Member Profiles and Manage their Calendar Availability\*
- Invite additional Team Members or remove Team Members\*

### TEAM MEMBER

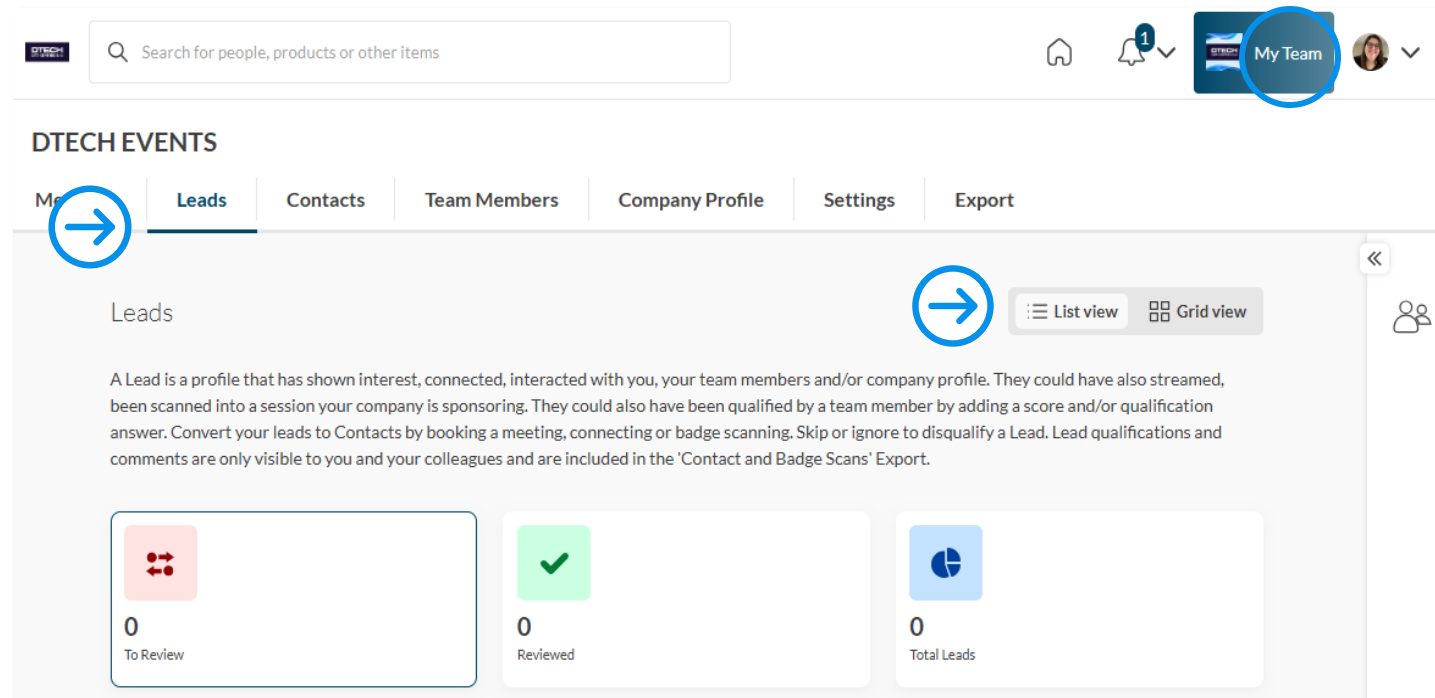
- Edit Company Profile
- Access Inbound Leads
- Export Connections (contacts) for entire team
- Request or Accept Meeting Requests on behalf of other team members

**\*\*NOTE:** Any person added to your team will be able to access the contacts and leads for **ALL** your team members. Only add team members to your team that should have access to see and export this information.



# LEADS\*

Event Participants that interact with you, your company, or your team members will appear in your “**Leads**”. This includes Profile Views; Connections/Interests; Session Registrations.



NOTE: Toggle the view by clicking the menu icon on the top right.

# LEAD QUALIFICATION\*

Once connected to a profile in the app, you have the option of adding "**Lead Qualifications**". These notes will be included in your Connections Export and can be customized for your company. In "**Settings**" you can add your Lead Qualification Questions. There are three options: Paragraph (text box); Single Select; or Multi-Select. These questions will appear once you've connected with someone to add information to follow-up post-event. Answers will not be shared with the profile; however, they will be shared across your team in the "**Export**".

DTECH EVENTS

Meetings | Leads | Contacts | Team Members | Company Profile | **Settings** | Export

Lead Qualification Settings

Customize the lead qualification questions that your team will use to assess leads. [Learn more](#)

Region 6/255 Single Select

Northeast x Southeast x Northwest x Midwest x Add new option

☒ 'Other' option

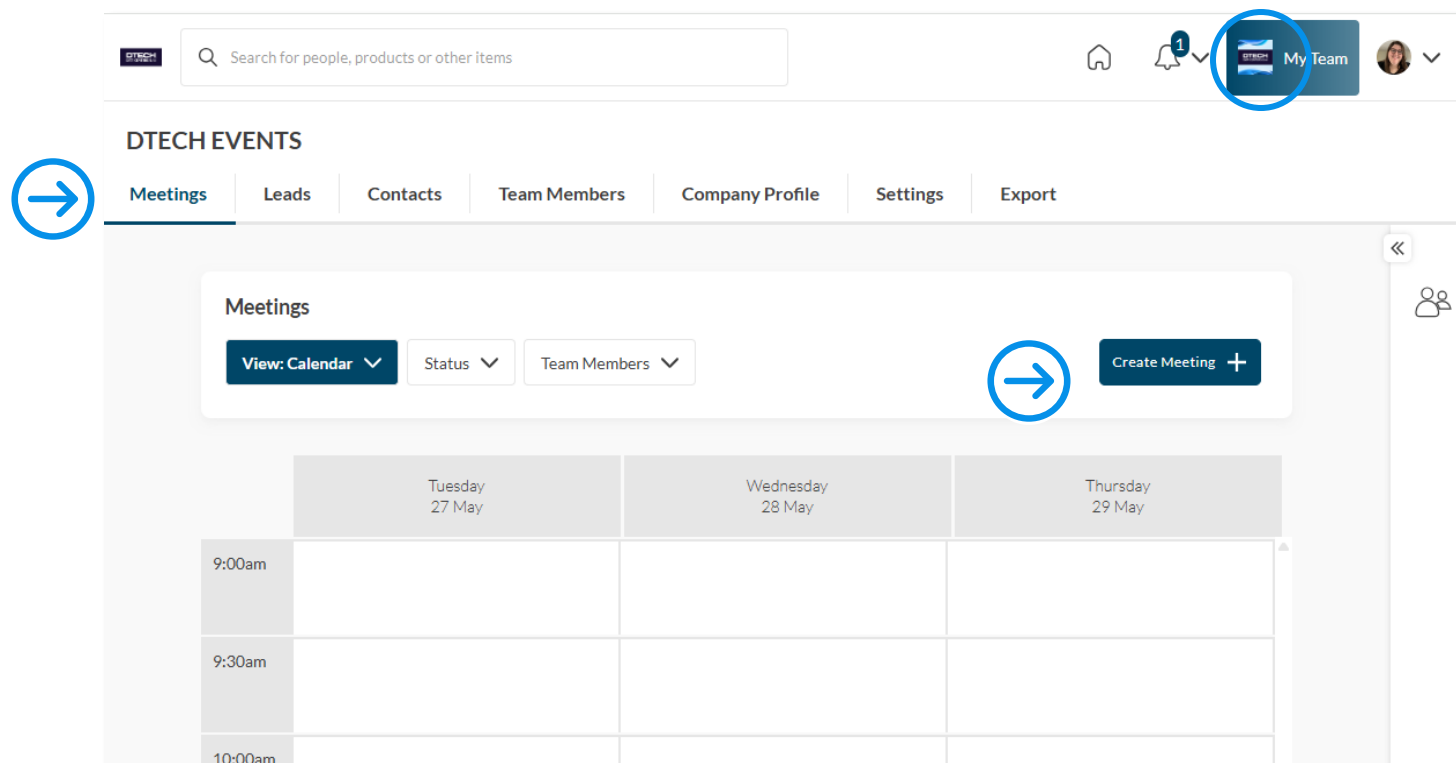
Note: Options will appear in the the order you add them. Please add them in your desired sequence

+ New Question Save Changes

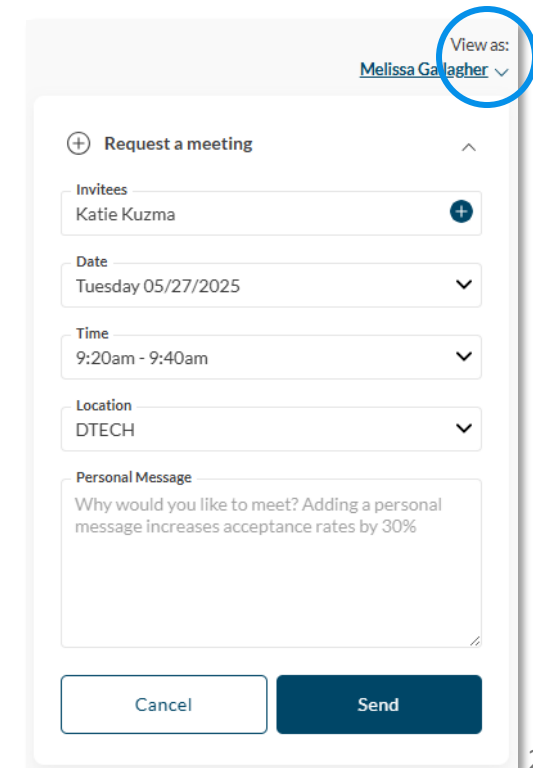
# MEETINGS\*

## REQUEST FOR TEAM MEMBERS

To request a meeting on behalf of one of your team members, navigate to **"My Team"** at the top right of the home page. Then click **"Create a Meeting"**. Then indicate the team member to request the meeting on their behalf. You can also navigate to the profile of who will receive the meeting request and click **"View As"** to change the person requesting the meeting to a Team Member.



The screenshot shows the DTECH EVENTS interface. At the top right, the 'My Team' button is circled in blue. Below the navigation bar, the 'Meetings' tab is selected, and the 'Create Meeting +' button is circled in blue. The interface includes a search bar, a home icon, a notification bell, and a user profile dropdown. The main content area displays a calendar for Tuesday 27 May, Wednesday 28 May, and Thursday 29 May, with time slots from 9:00am to 10:00am. A blue arrow points to the 'Meetings' tab.

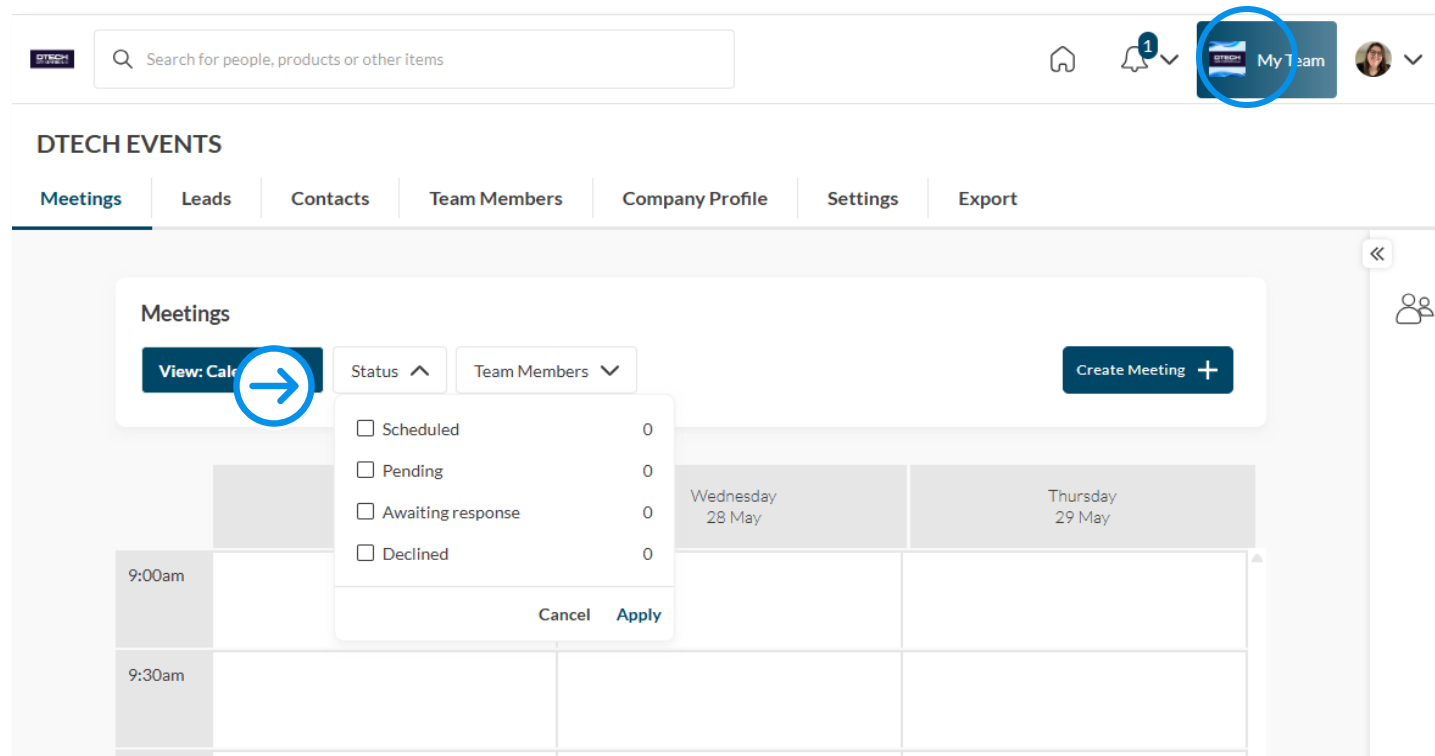


The screenshot shows the 'Request a meeting' form. The 'View as: Melissa Gallagher' dropdown is circled in blue. The form includes fields for Invitees (Katie Kuzma), Date (Tuesday 05/27/2025), Time (9:20am - 9:40am), Location (DTECH), and a Personal Message field. The 'Send' button is highlighted in blue.

# MEETINGS\*

## ACCEPT FOR TEAM MEMBERS

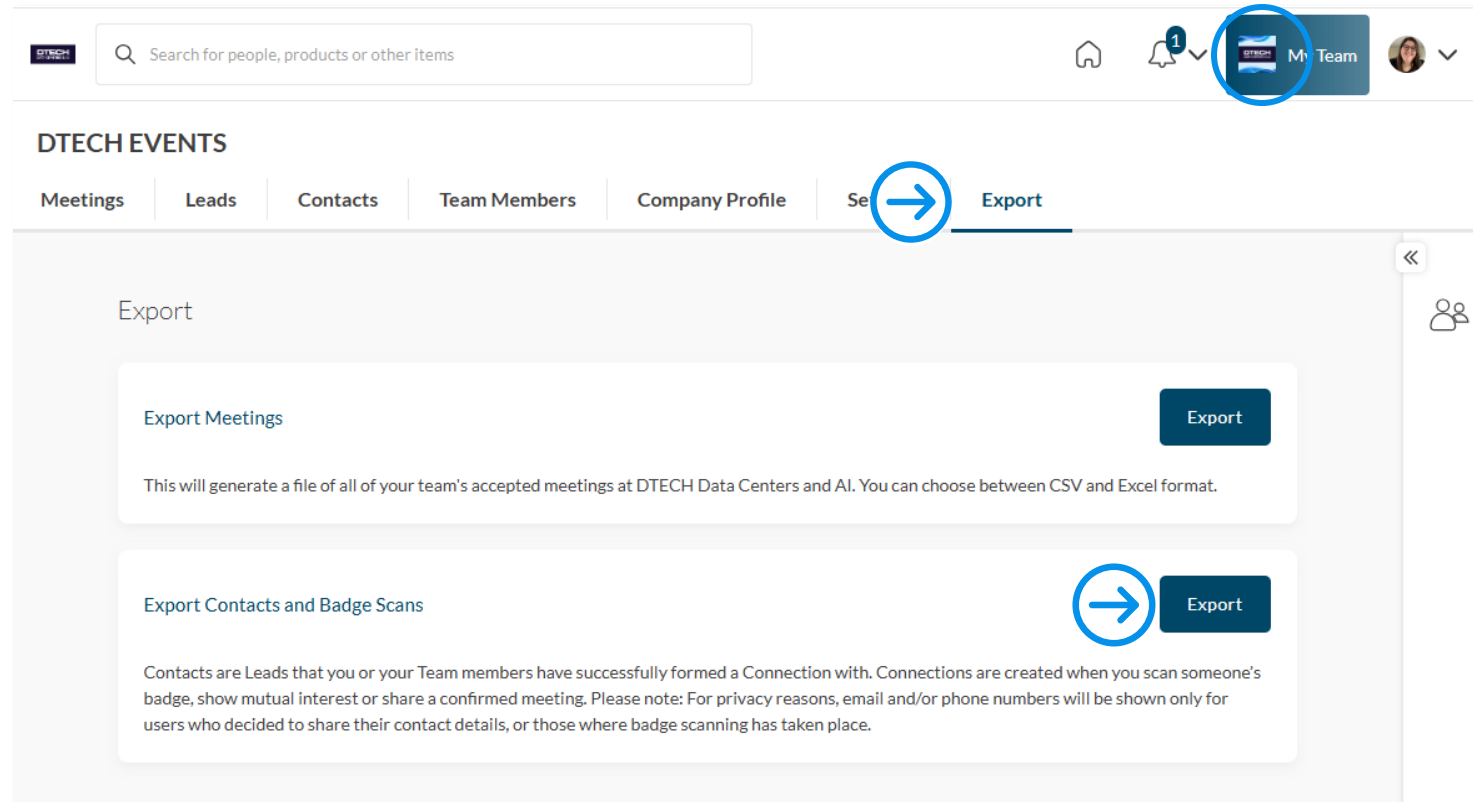
To accept a meeting on behalf of one of your Team Members, navigate to "**My Team**" at the top right of the home page. Then click "**Pending**" under "**Status**" at the top. After clicking on the Meeting, you'll be directed to the organizers profile. Then click "**Accept**". Both parties will receive an email confirmation of the meeting.



# EXPORT TEAM CONTACTS\*

From the web platform, you can export a list of all your connections – anyone you or your team has connected with through the platform or had a meeting with - into an .csv file by going to “My Team” then “Export.”

**Due to GDPR email and/or phone numbers will be shared only for the users who decided to share their contact details.**



NOTE: To download your individual connections report, go to “My Profile”, then “Export”.