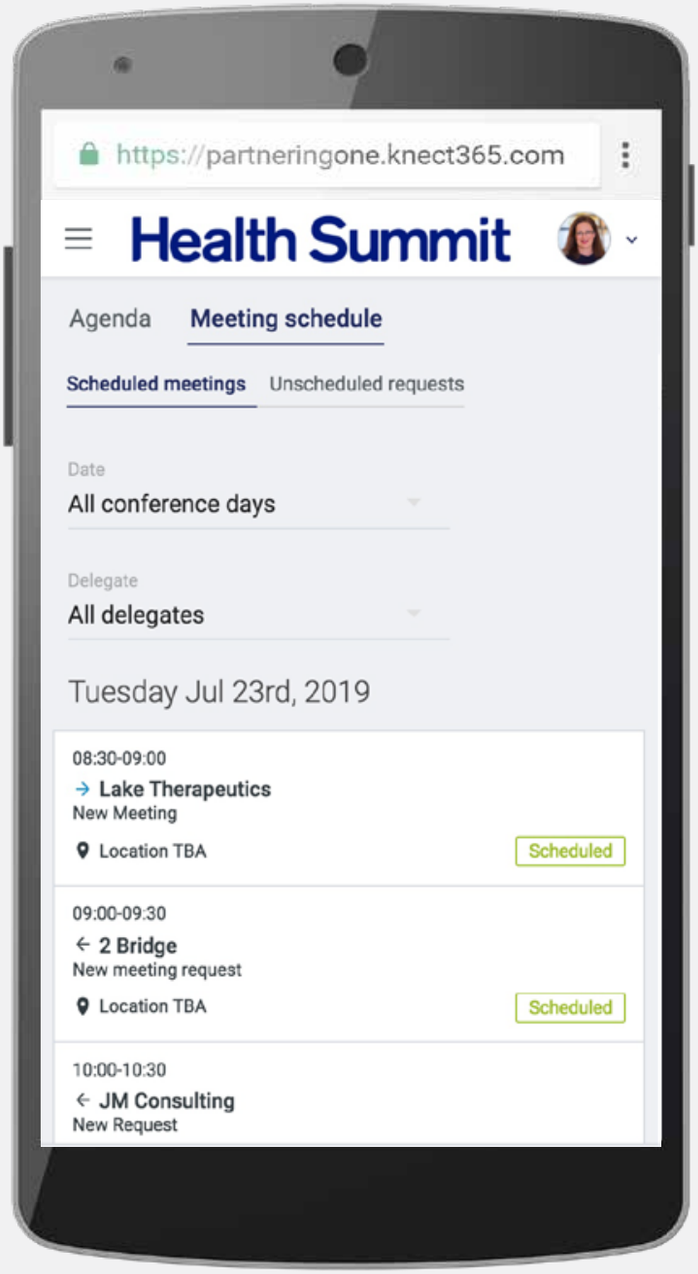
partneringONE®

TOP 10 TIPS
for unleashing the power of productivity

TIP 1: Go mobile

STAY UP TO DATE ON YOUR MOBILE

You now have the power to access live data on-the-go with the responsive platform.



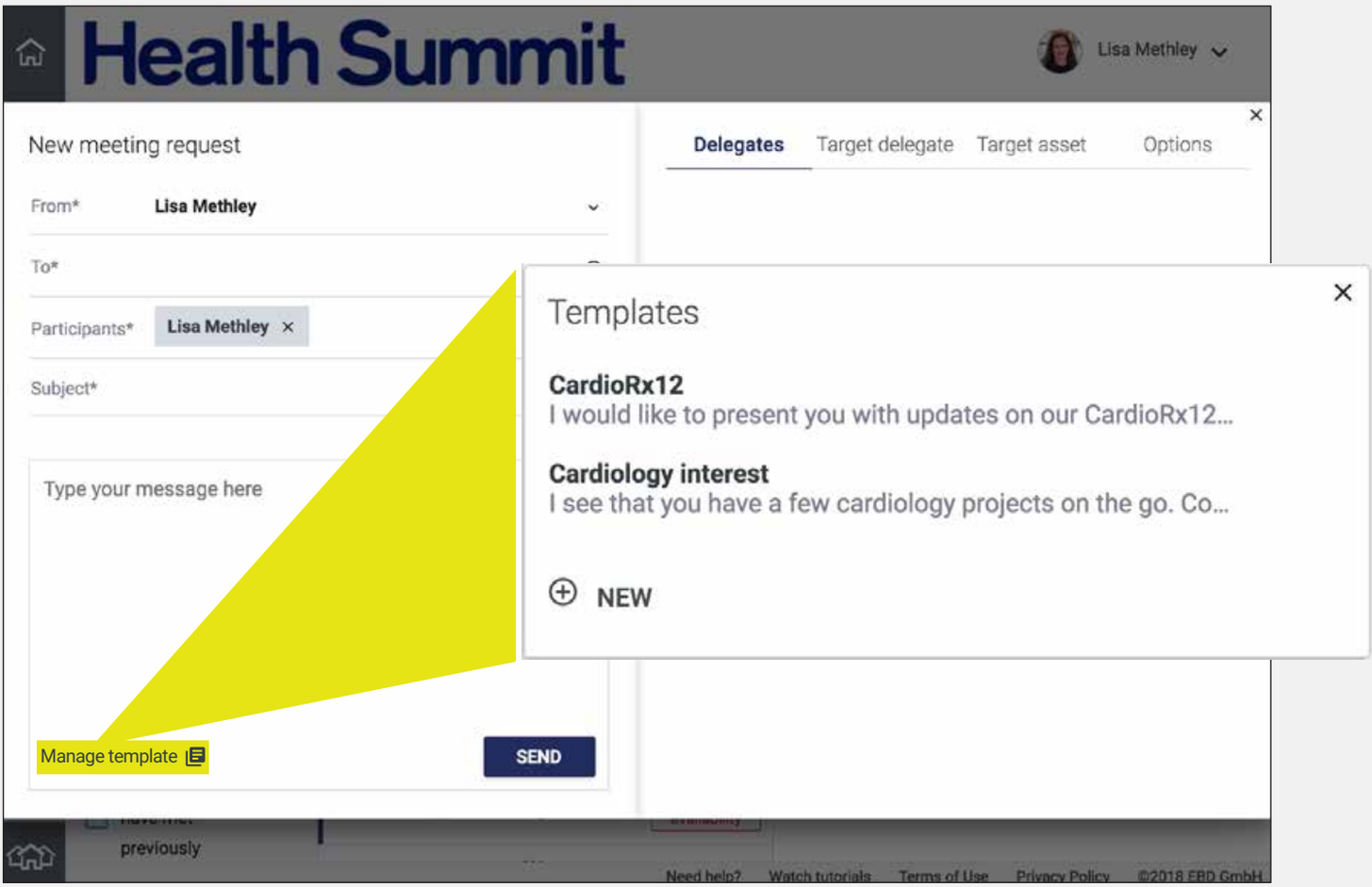
HOW TO:
There is nothing to download to your phone. Simply navigate to the event website and login. Add to homescreen for easy access in future.

TIP 2: Save time

CONNECT MORE QUICKLY WITH TEMPLATES

Save time by using custom templates to connect with partners.

HOW TO:
Use the template icon to create or re-use company-wide templates. Edit them easily to personalize for each prospective partner.

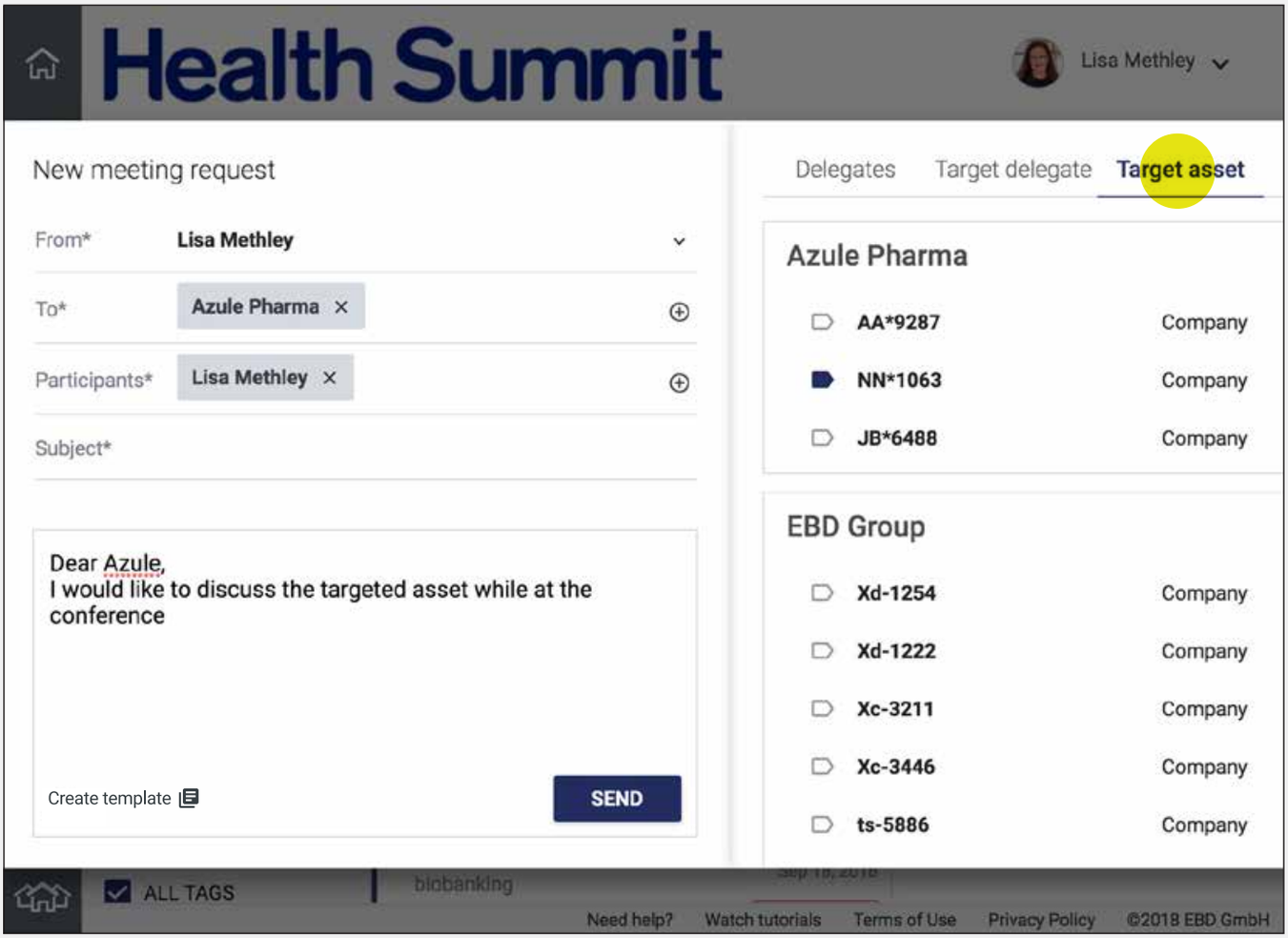


TIP 3: Target

TARGET AN ASSET OR DELEGATE

Target the right delegate or asset to increase the likelihood of positive outcomes for your meetings.

HOW TO:
Select the delegate or asset when sending a new meeting request by selecting "Target delegate" or "Target asset." It can be your own asset or theirs.

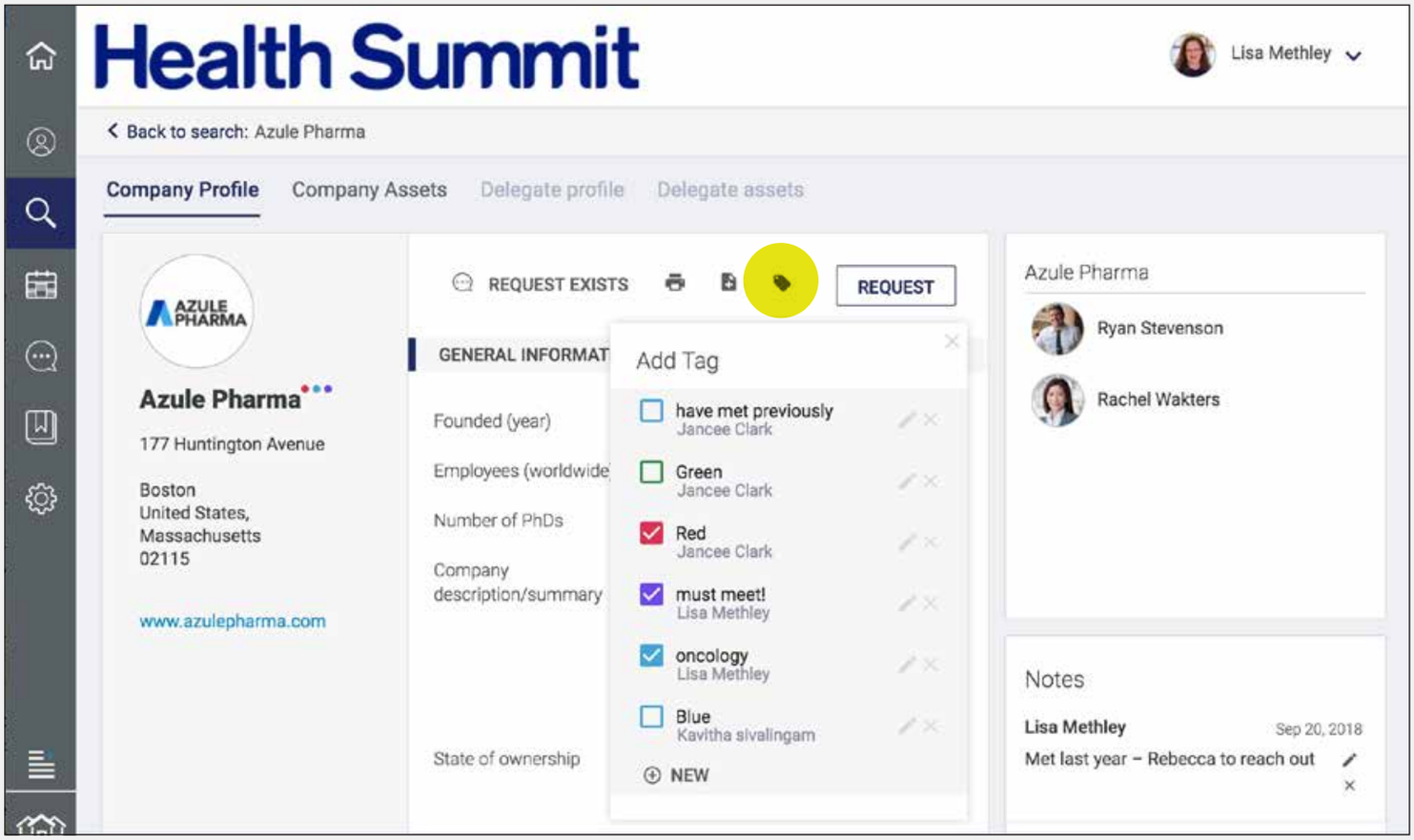


TIP 4: Bookmark with tags

GET ORGANIZED WITH TAGS

Increase your productivity by focusing your thoughts with tags.

HOW TO:
Add or create customized tags by clicking on the tag icon so you can categorize partners' profiles, such as 'met before', or 'high priority'.



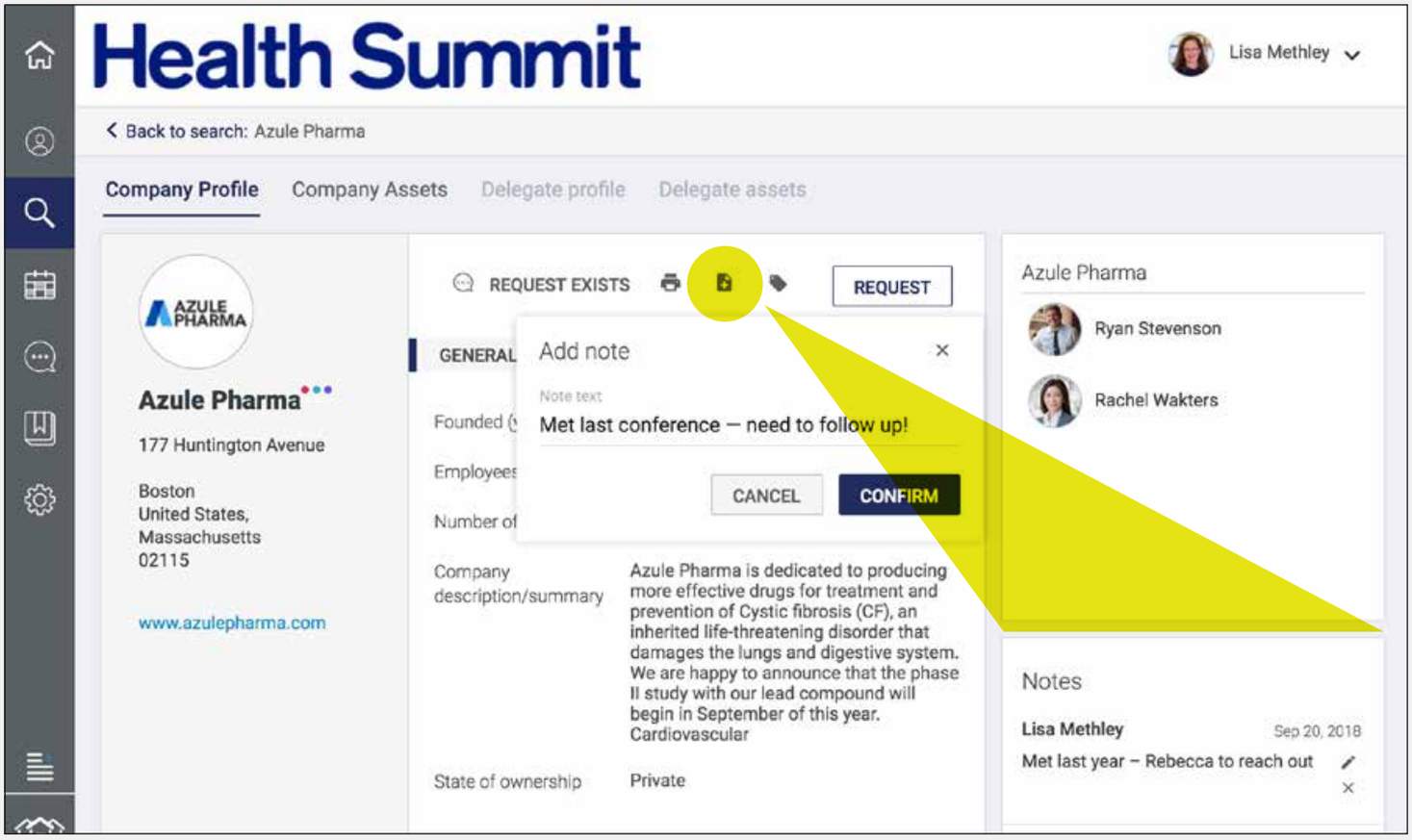
TIP 5: Profile Notes

COLLABORATE MORE WITH NOTES

Track profiles of interest by adding a note directly on the profile of individuals and companies.

HOW TO:

Add notes to any profile by clicking on the notes icon on the top of profiles. Notes are private to your company, can be searched for within your Lists page, and can be accessed from mobile or printed in your schedule.

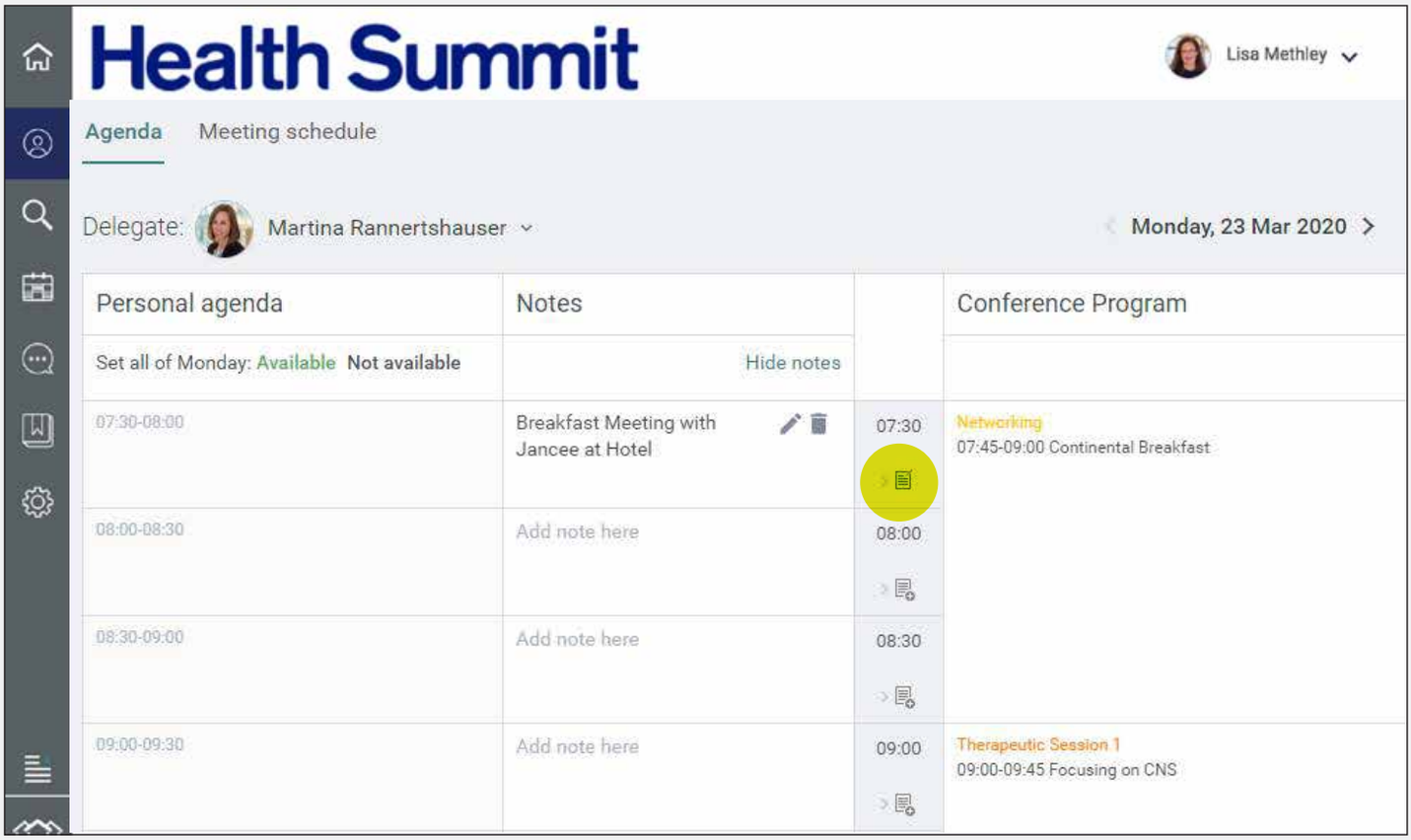


TIP 6: Agenda Notes

ADD NOTES TO STAY ORGANIZED

Add notes to your Agenda to remind you of activities arranged outside of the partnering system.

HOW TO:
Click on the icon next to the corresponding timeslot where you would like to add a Note. Notes will also show on your meeting schedule.



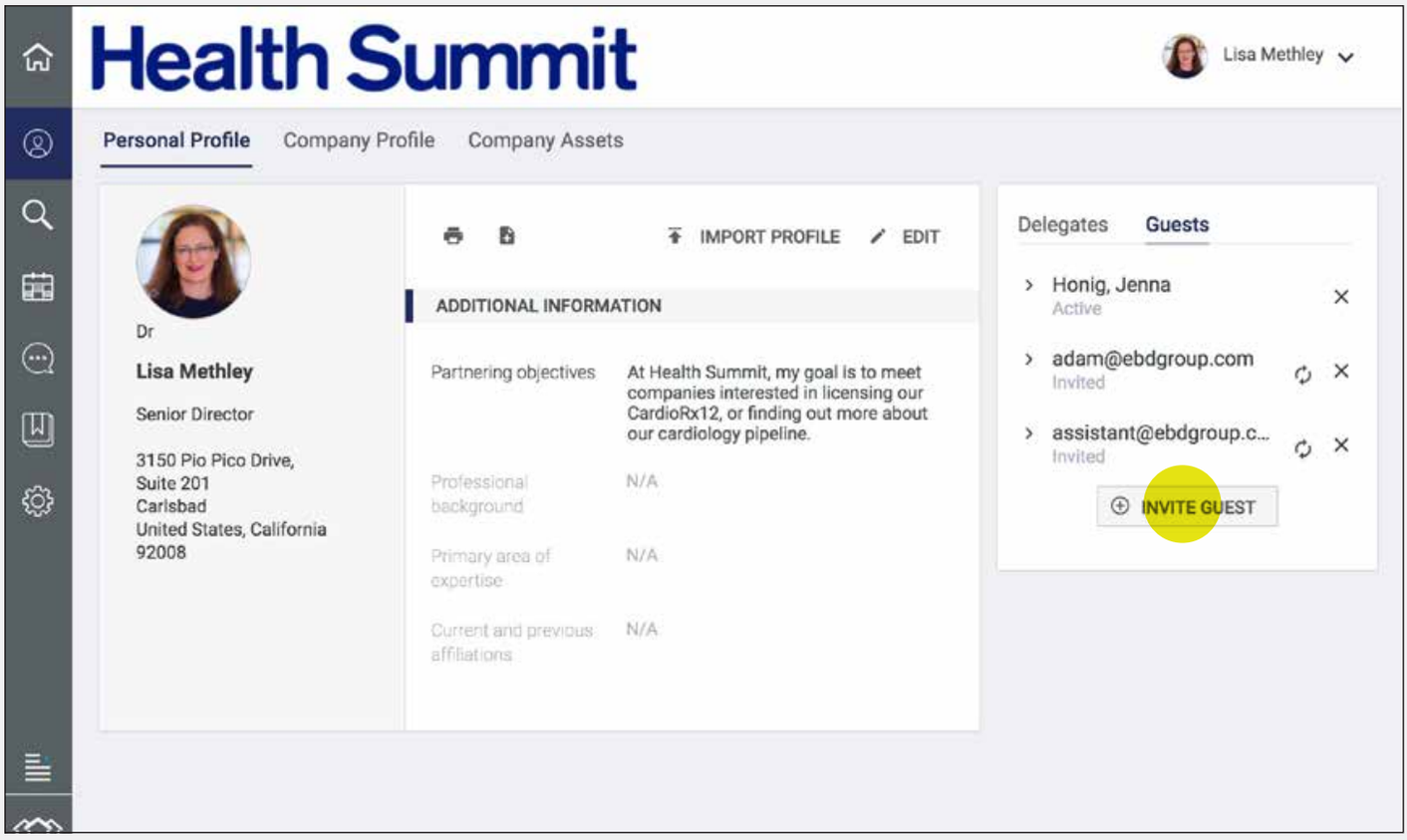
TIP 7: Guests

SHARE YOUR WORKLOAD BY INVITING A COLLEAGUE

Invite a guest to your account to help manage your meetings and act on your behalf.

HOW TO:
Invite a guest via your own personal profile page by selecting "Guests" - "Invite Guests". They will receive an email with their own personal login link. There is no need to share your own login credentials. You can cancel a guest account at any time.

Please note that your Guest is not registered to attend the conference.

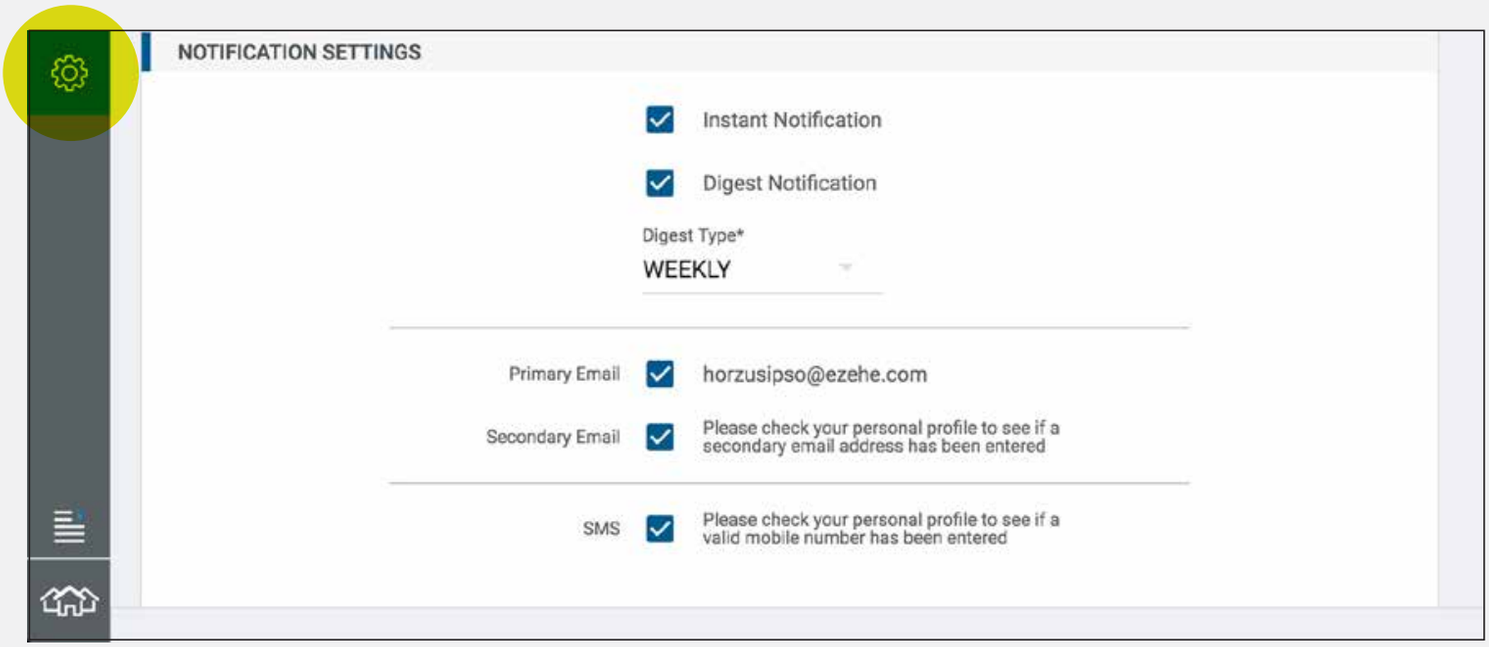


TIP 8: Settings

NOTIFICATIONS

Manage notifications you want to receive for this event.

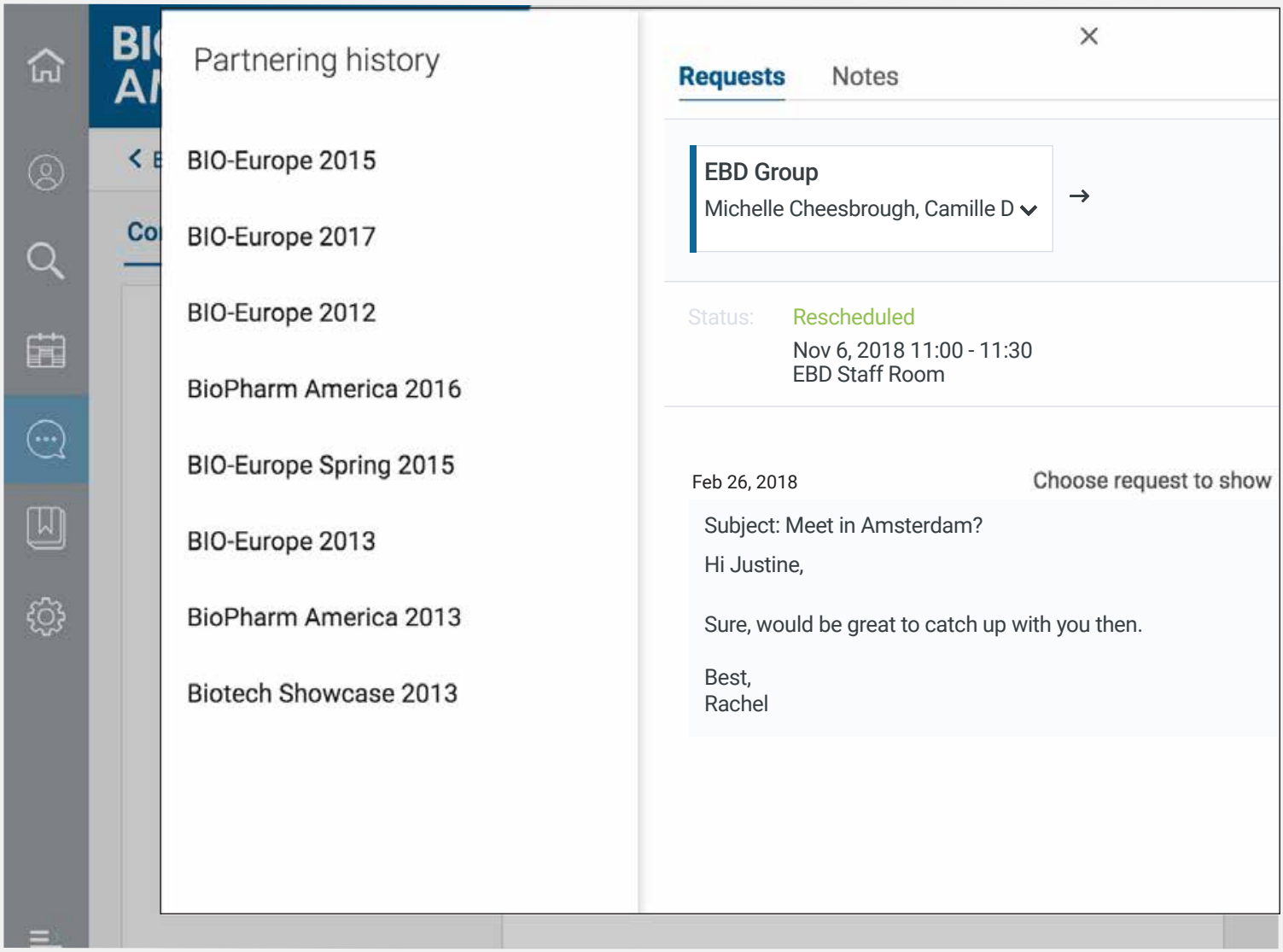
HOW TO:
Go to your Settings page to manage your email and notification preferences. You can subscribe to SMS notifications, add another email address as a secondary email as well as turn on instant notifications and digests.



TIP 9: History

ACCESS YOUR PARTNERING HISTORY

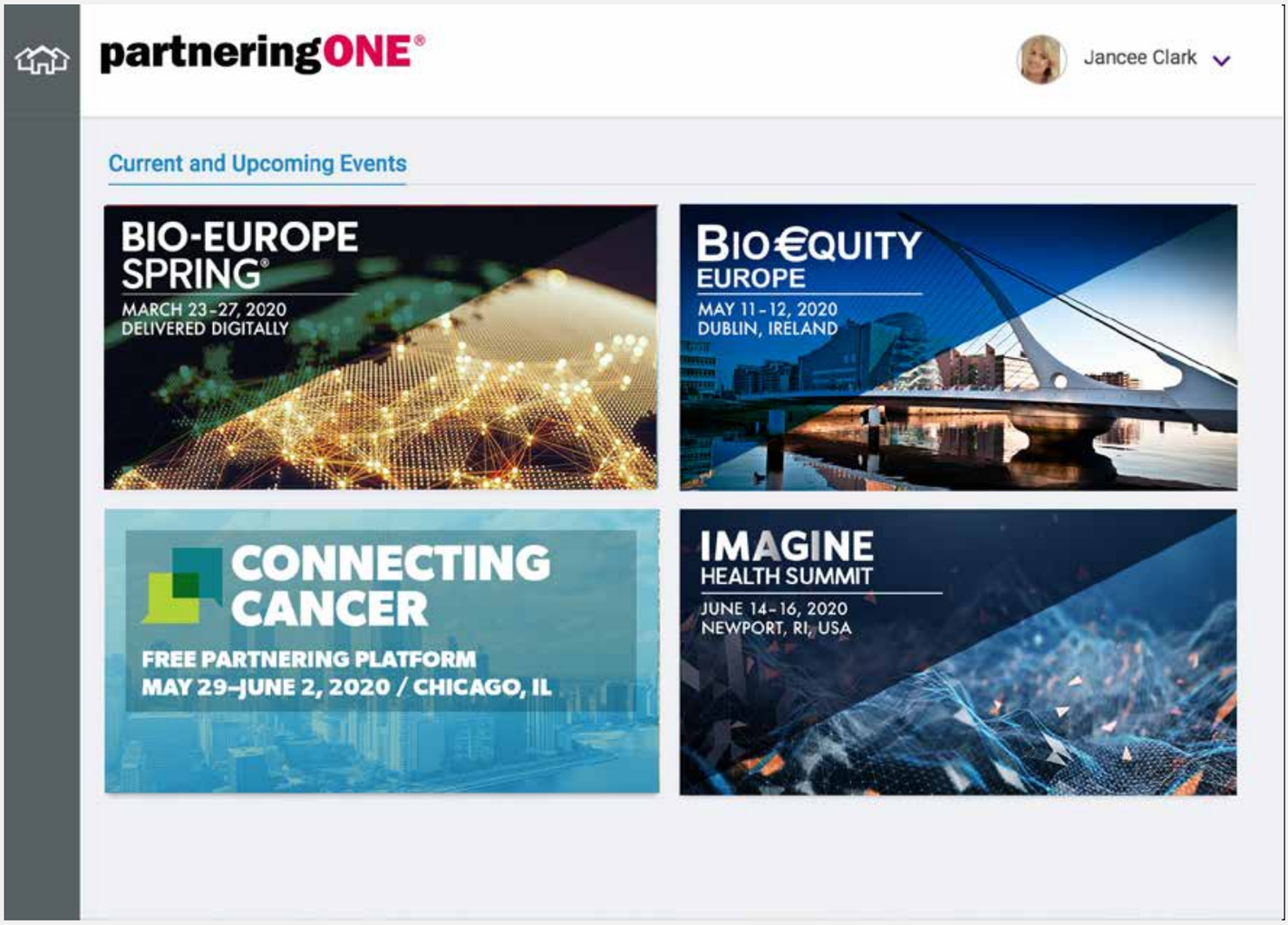
HOW TO:
A history icon will appear on profiles you had previous interaction with. Click the history icon to view your partnering history. Note, your history is tied to your company email address.



TIP 10: One login

REMINDER!

Access all partneringONE events with one login.
Switch between your partneringONE events.



MORE POWER, MORE POTENTIAL

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a complete set of tutorials,
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