THE NETWORK BUILDING PENSIONS AND LIFETIME SAVINGS ASSOCIATION

SWAPCARD INTERACTIVE PROFILE GUIDE

PLSA CONFERENCES

swapcard

PLSA are using Swapcard as the event app provider. You will be using the tools in the Swapcard Exhibitor Centre to configure your Interactive Profile, manage your team, and interact with attendees.

DOWNLOAD THE PLSA EVENTS APP

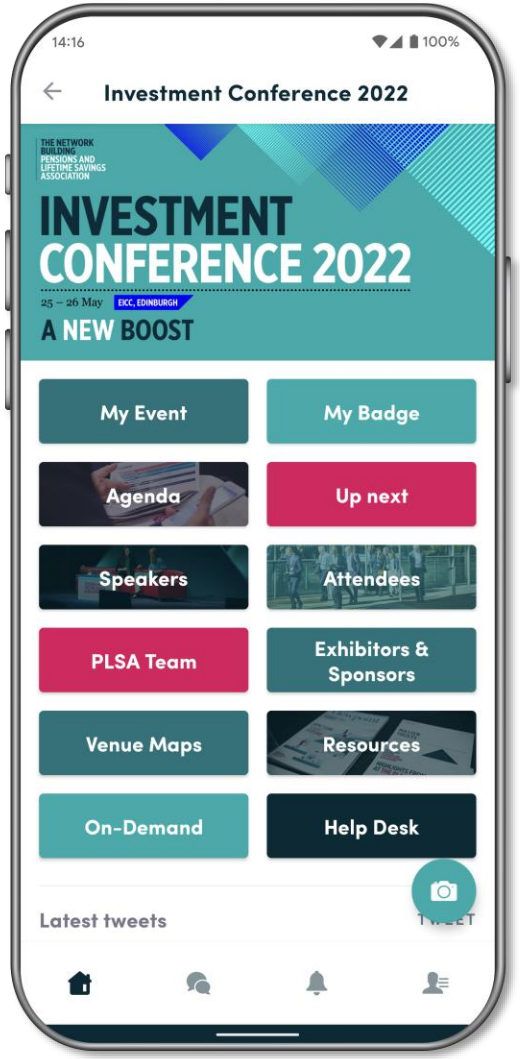
The complete, interactive, AI-powered guide to our conferences

PLSA [Get the app for iPhone or iPad](#)

PLSA [Get the app for Android](#)

Or scan this QR code from your device:

Click here for the web browser version: https://plsa.app.swapcard.com



ACCESS TO THE EXHBITOR CENTRE

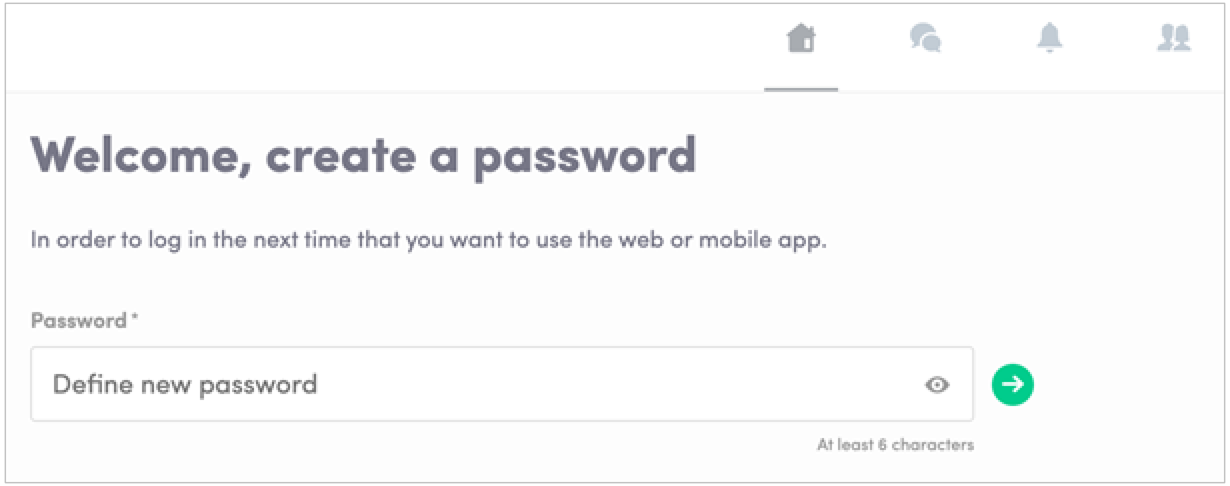
HOW TO LOG ON

HOW TO LOG IN TO THE APP FOR THE FIRST TIME

Once registered for the event your Swapcard account for the PLSA Events app will be created by PLSA.

The app opens approx. two weeks prior to the conference. You will receive an email invite similar to the one on the right.

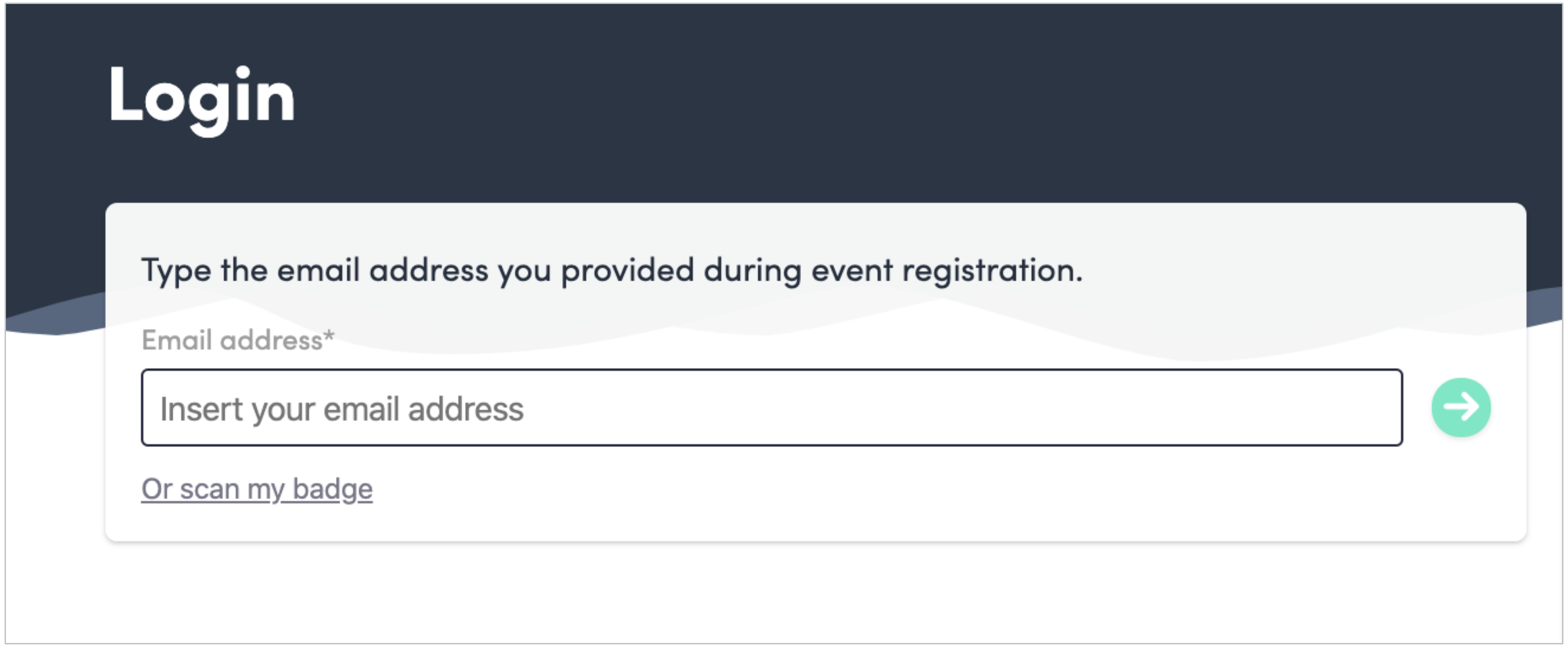
The **«Let's get started!»** button in the email will take you to the Swapcard platform and prompt you to create a password for your account.



Please be prepared and log in a few days before your session to familiarise yourself with the features

HOW TO LOG IN TO THE EVENT IF YOU ALREADY HAVE A SWAPCARD ACCOUNT

Access your account at https://plsa.app.swapcard.com
Enter the email address you used to register for the previous event and the password you created for it.
Then click enter to connect.

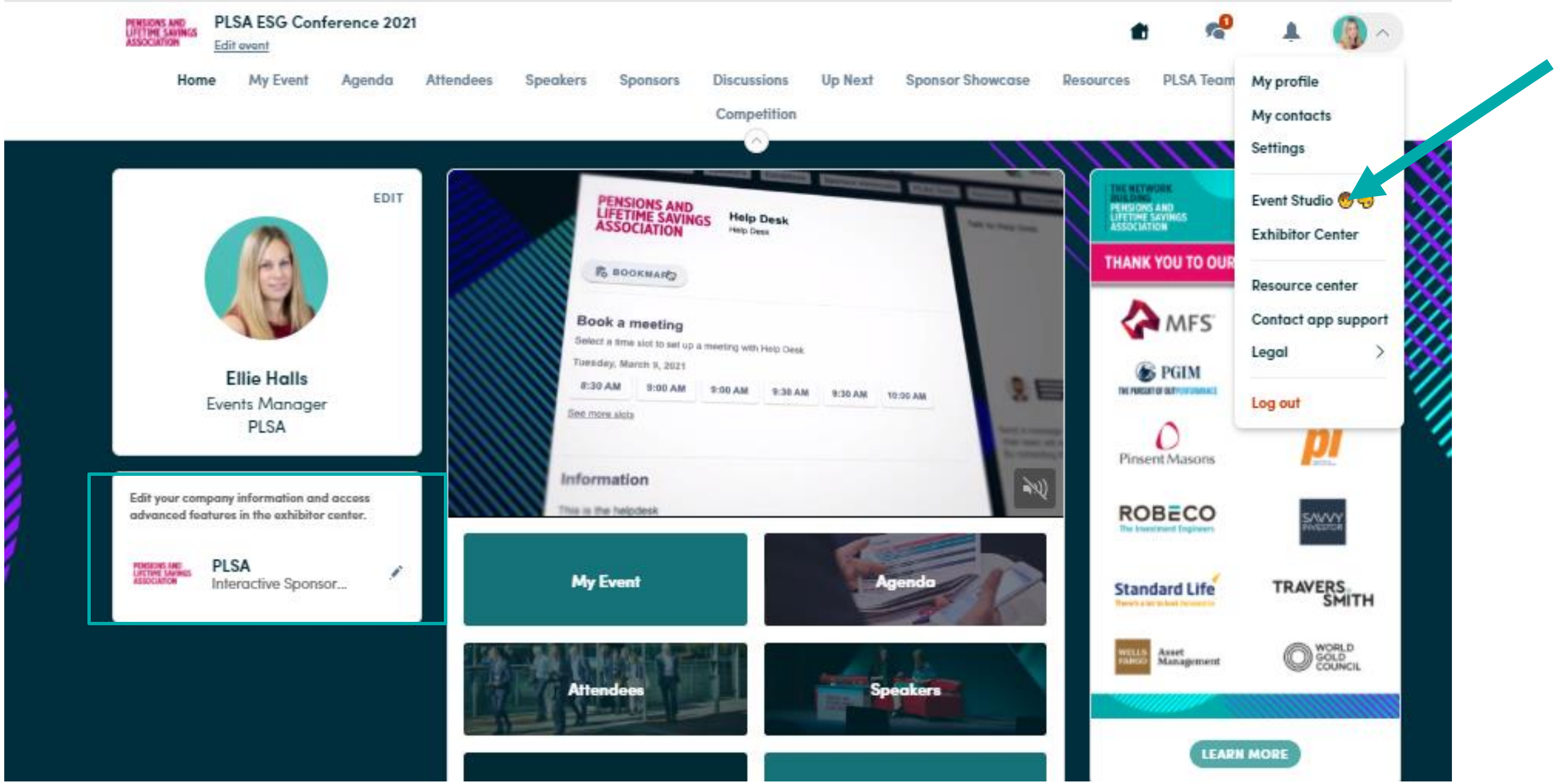


Note: If you have forgotten your password enter your email address then click on **Send me a magic link**. You'll receive in your mailbox an email to reset your password. If you need any help please contact support@swapcard.com

SETTING UP
YOUR INTERACTIVE PROFILE

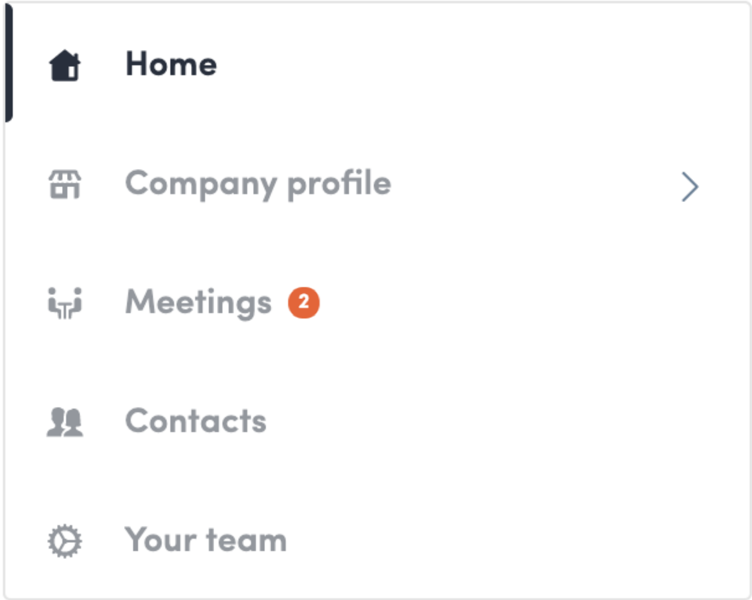
NAVIGATION

Your profile is set up and managed via the Exhibitor Centre click on your company or on the button « Exhibitor Centre » in the drop down menu.



NAVIGATION

This is the menu bar that appears on the left side of your screen. It will be useful for you to navigate between the different sections of the Exhibitor Centre.



Home is the first page that you will see when accessing the Exhibitor Centre

A red pin indicates that you have a **pending notification**

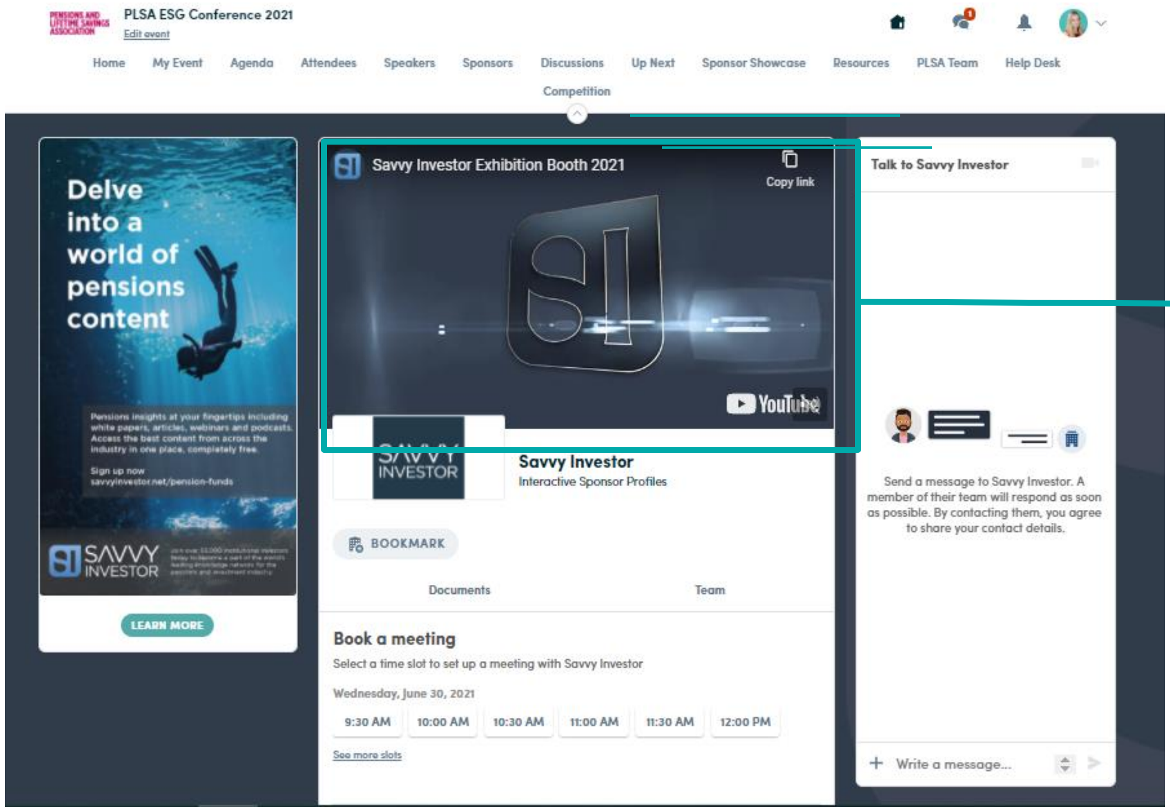
INSTRUCTION FOR PROFILE SET UP

To make your profile as attractive as possible and maximise on attendee engagement, you should upload all of the content areas and information available to you. Any assistance with set up please contact mollie.mayo@plsa.co.uk

- ✓ **HEADER IMAGE**
  Import a 1200 x 675 px (16:9 ratio) image, no larger than 1MB
- ✓ **HEADER VIDEO**
  video ID on YouTube or Vimeo; be sure to enter the video ID, and not the full URL of the video
- ✓ **BACKGROUND IMAGE**
  Import a 2560x1600px (16:10 ratio) image, no larger than 1MB
- ✓ **ADD SOCIAL MEDIA LINKS**
- ✓ **ADD DOCUMENTS**
  Unlimited document uploads (links to content or imported files)

ADD ADVERT TO YOUR PROFILE
Import a 1080x1920px (9:16 ratio) image, no larger than 1MB. with click through to chosen URL

HOW TO ADD AN IMAGE, LOGO OR VIDEO TO YOUR PROFILE



You are able to upload an image, a video banner, or a video onto your company homepage.

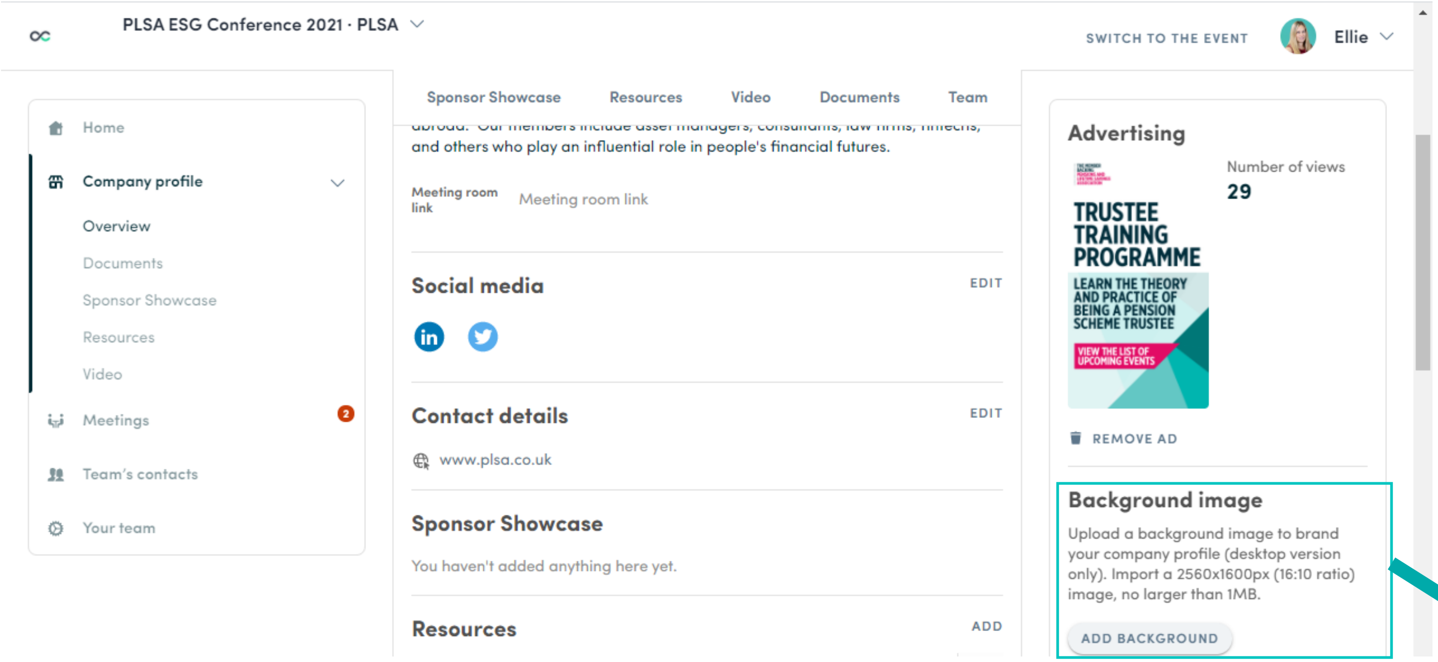
To upload a file, go to your Exhibitor Centre and click on « Company Profile ». In the first part, click on « Edit ».

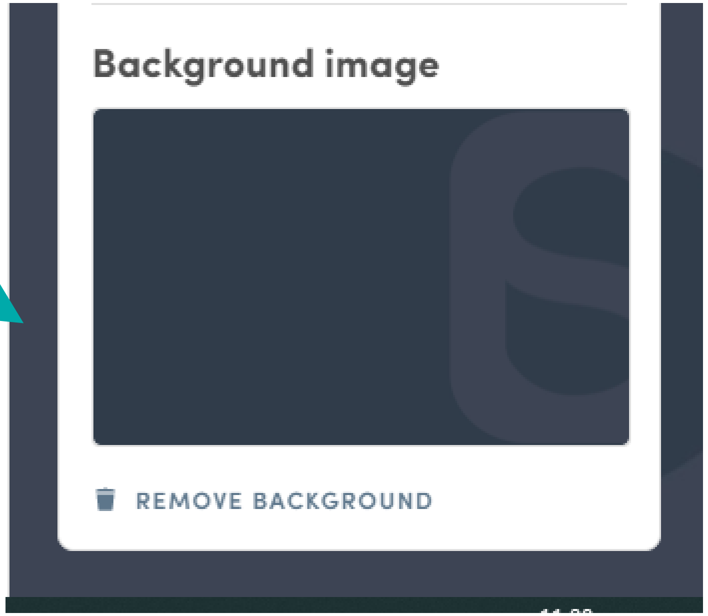
You will then be able to add your file or a YouTube video ID as a banner.

Note: A YouTube video ID is the characters after « /watch?v=_ » in the website link.

- For example in « https://www.youtube.com/watch?v=_mKoi9VNgx4 », the ID of the video is « mKoi9VNgx4 ».

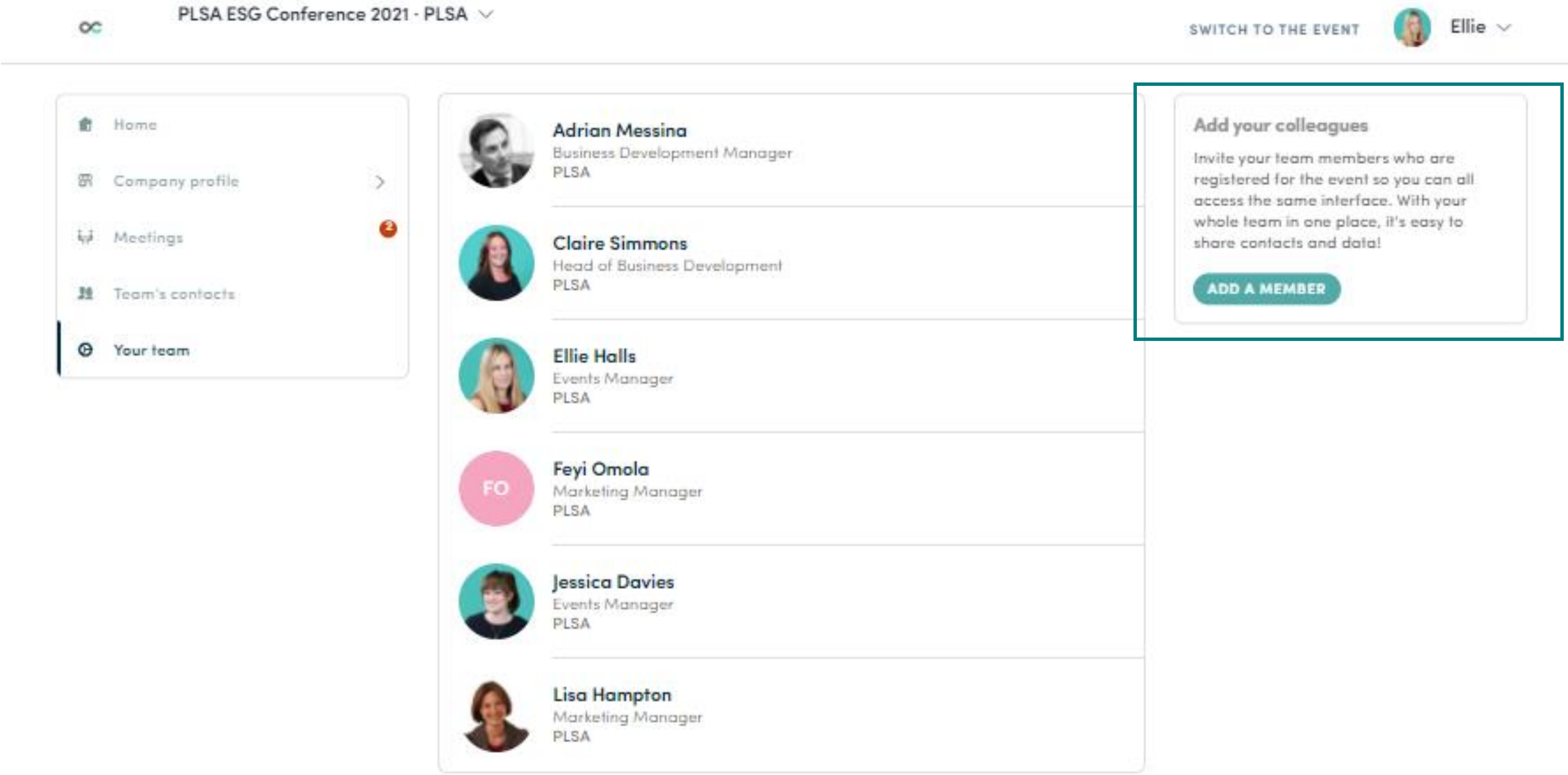
HOW TO ADD A BACKGROUND TO YOUR PROFILE





To upload a file, go to your Exhibitor Centre and click on «Company Profile ». You will then be able to add your file

HOW TO ADD A TEAM MEMBER TO YOUR PROFILE

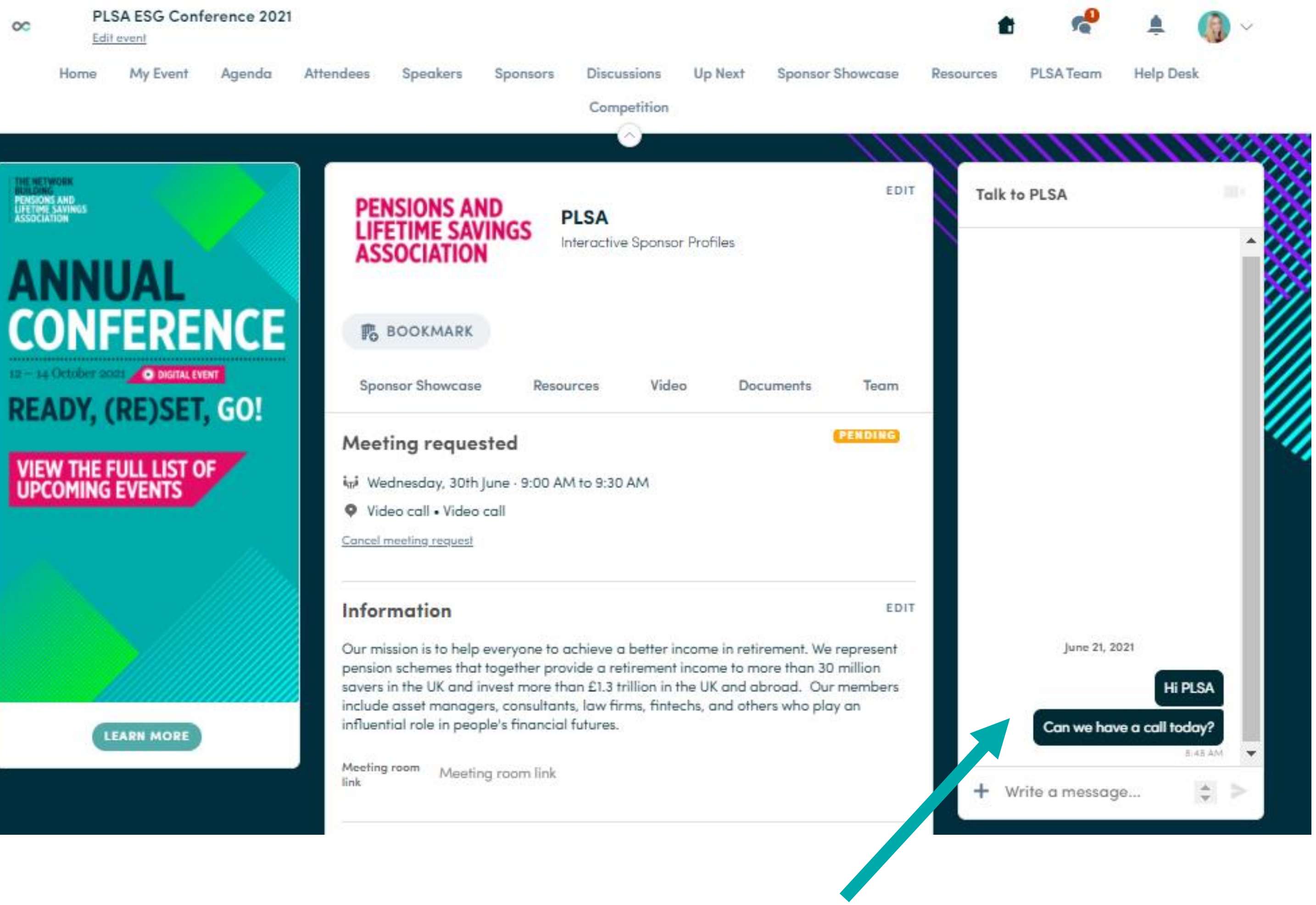


Initially only the lead sponsor contact will be pre-regisered to your profile.

When the platform opens to all attendees you will be able to add colleagues (registered for the event) to your team. Once added they will be able to view the incoming queries and meeting requests. You are also able to assign them to particular meetings. You will also be able to monitor the contact they scan on site and any notes they make about them.
To add a team member, click on the button here and add their email address. They will then receive access to the Exhibitor Centre

Click the «Your Team » tab to see everyone that you have set up to be a team member of your stand.

RESPONDING TO MESSAGES TO YOUR PROFILE



Once you are added to the team, you will have access to the profile inbox shared with all of your team members. Messages in the inbox are generated when an attendee visits your profile and types a message into the «Talk with…» window.

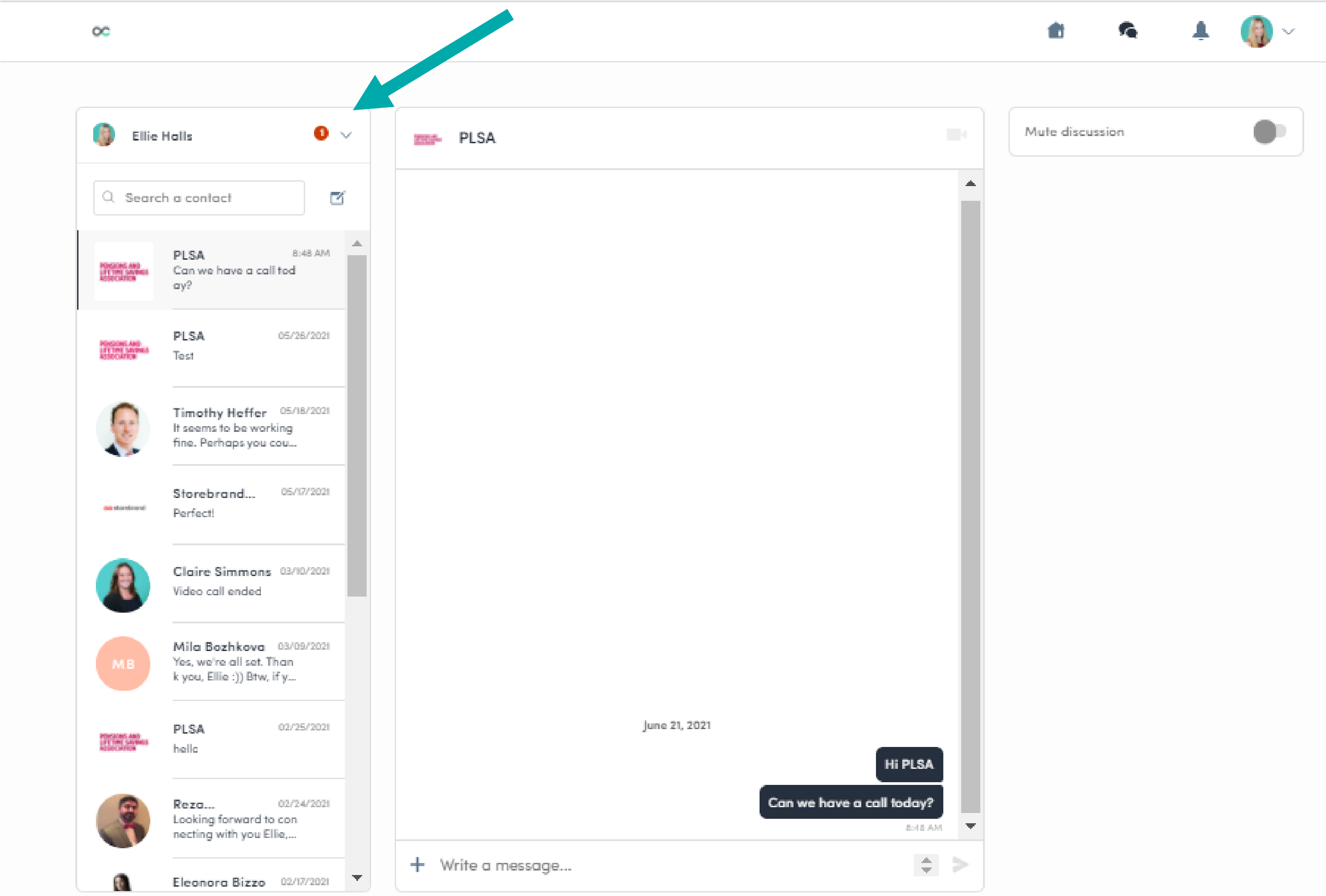
For the attendee, the message appears within a chatbox on the right hand side of the profile page as a 1:1 chat. For the team, the message generates a notification in the platform, and appears as a message in the inbox.

A sponsor team member will not see the discussion in the «Talk to» window; only the attendee will see it there.

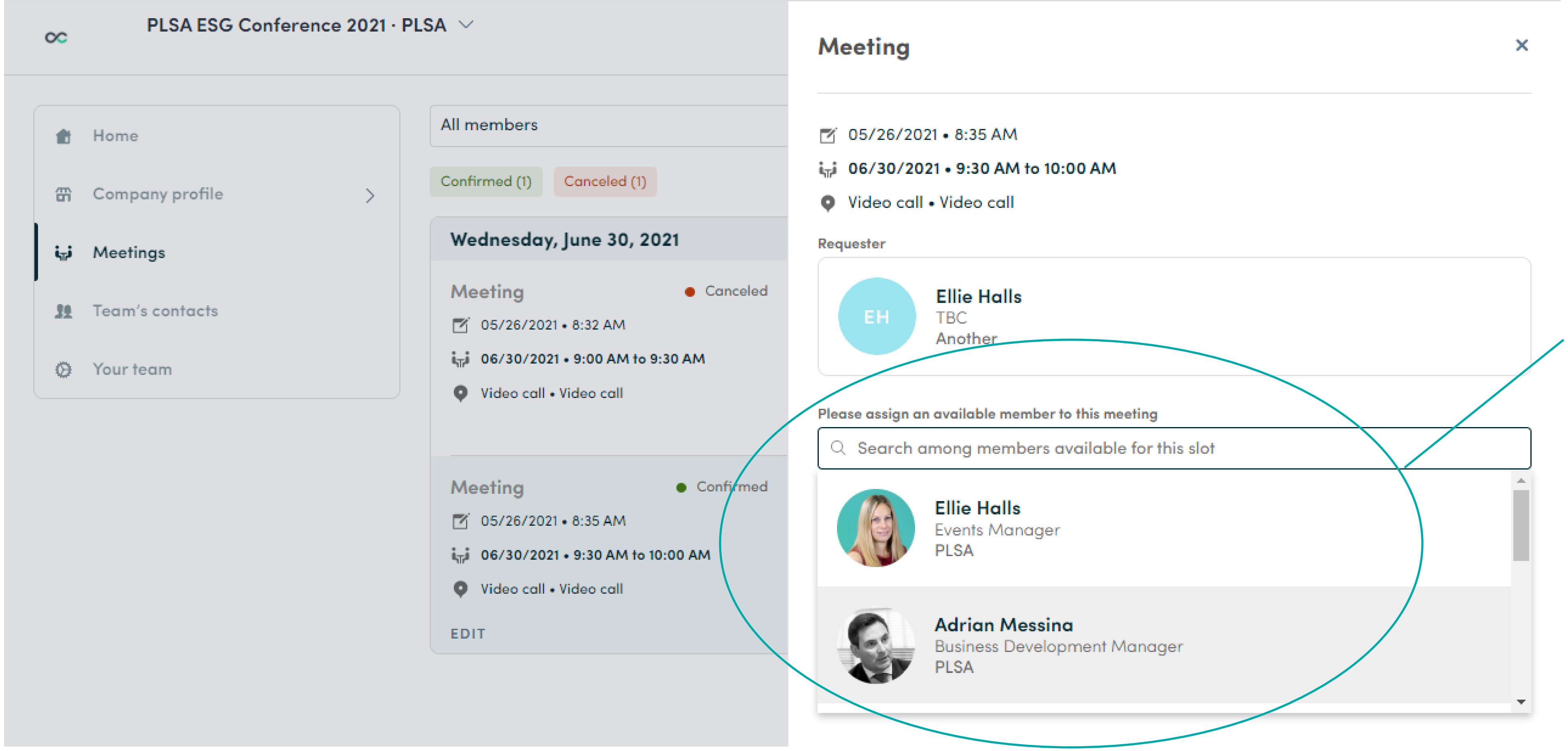
RECEIVING AND RESPONDING TO MESSAGES AS A TEAM MEMBER

To view your profile inbox, click on the chat bubble icon along the top menu. Once there, toggle between your personal inbox and the profiles' inbox by clicking on the dropdown box nested under your name on the left hand side.

All of the stand team will see a red notification circle over the chat bubble icon when new messages are received. Please note that once ay team member reads the message, the red circle will disappear for the entire team.



HOW TO ASSIGN A MEMBER OF YOUR TEAM TO A MEETING

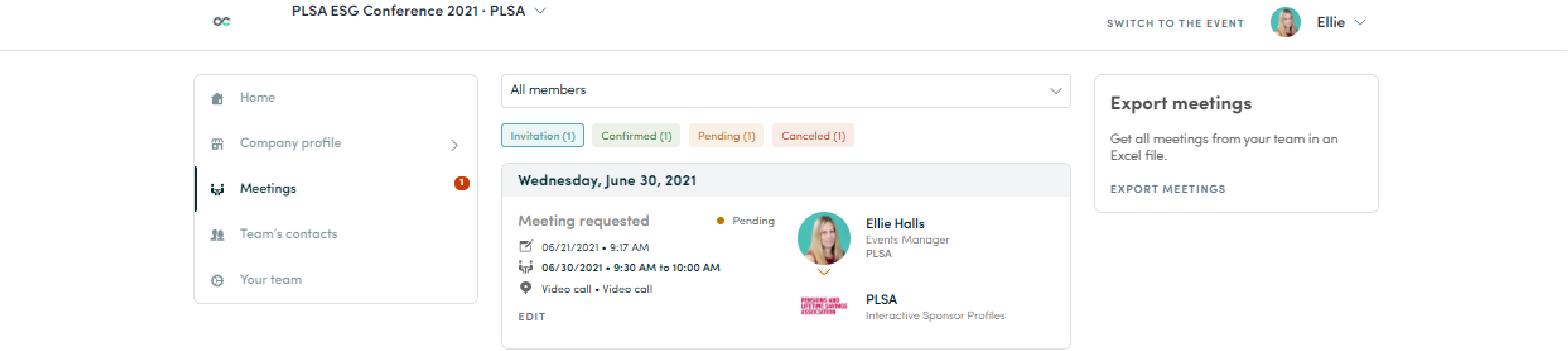


From the Exhibitor Centre, you can manage your teams meetings.

Go to the « **Meetings** » tab and see all of your team meetings during the event.

To assign or change a team member taking a meeting, click on the meeting and choose the team member you want to assign.

MANAGE MEETINGS FOR YOUR TEAM



In this section you can:

- **Display the meetings** of your team
- **Filter meetings by status** : Pending, Validated or Declined, Cancelled.
- **Assign a meeting to a member of your team** : click on « answer » on the meeting request, and choose the person to assign.
- **Accept or decline meeting requests**
- **Export the full list of meetings** from your team.

LEAD CAPTURE VIA THE APP

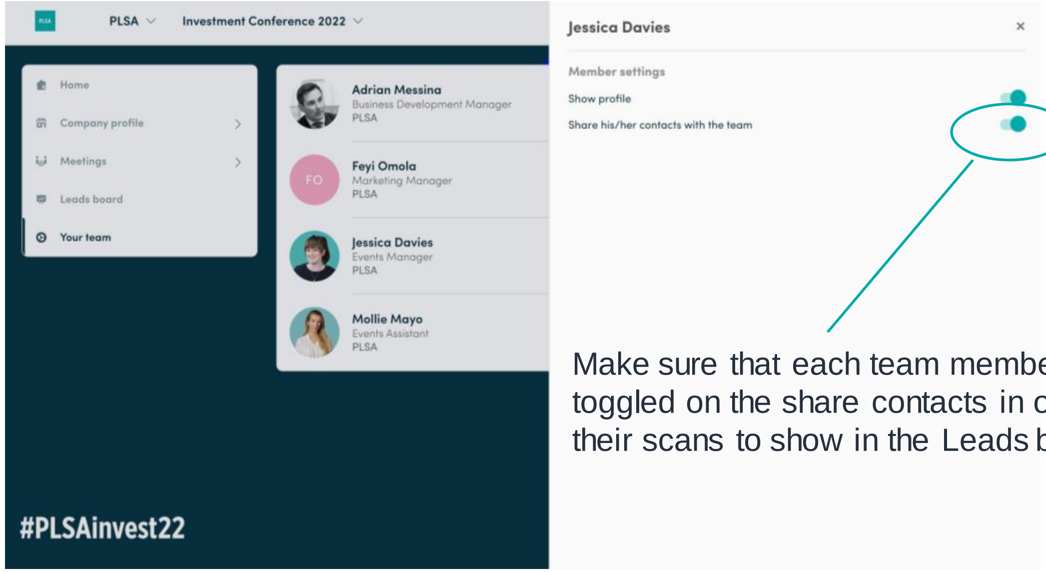
Everyone representing your company on site should download the event app.

Via the app you can scan delegate badges to capture or exchange contact details. As exhibitors you can capture and store the data for each contact and meeting that your team have on site. You can also rate, make notes and add tags for follow up.

All of this can be exported via the exhibitor centre for follow up or to upload into your own CRM system.

In order to do this you need to make sure that everyone on site is added as a team member to your profile

You scan delegate badges via the camera icon on the app home screen.



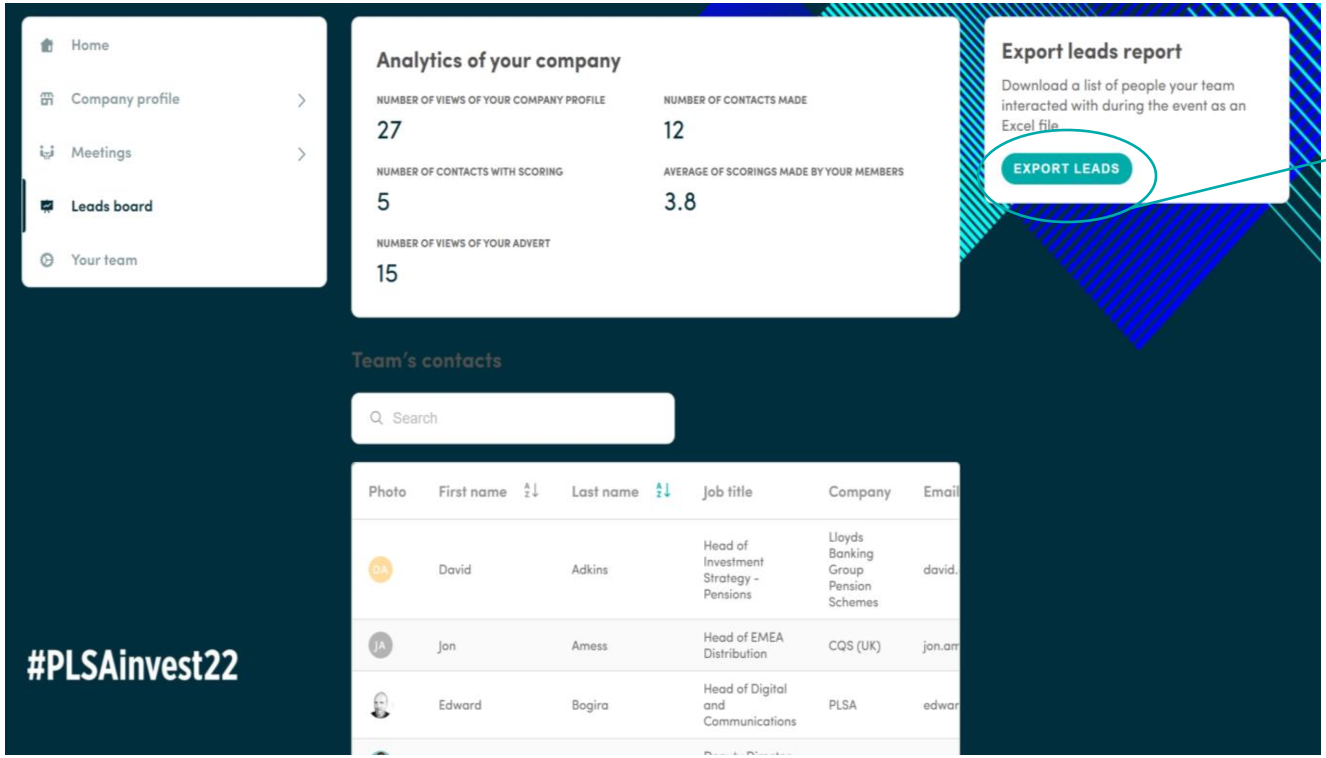
Make sure that each team member has toggled on the share contacts in order for their scans to show in the Leads board.

You can also export any contacts made yourself as an excel file by going to your contacts and clicking on "export".

Let's talk GDPR…

When an attendee submits a query to your stand, or someone connects with your team, they tacitly agree to share information with you. You therefore retrieve this information in accordance with the GDPR.

EXPORTING LEADS MADE BY THE TEAM



By going to «Leads board» tab, you can view and export all the contacts collected by you and your team before, during, and after the event.

Check that all of your stand team have activated the share contacts functionality to enable this.

Let's talk GDPR…

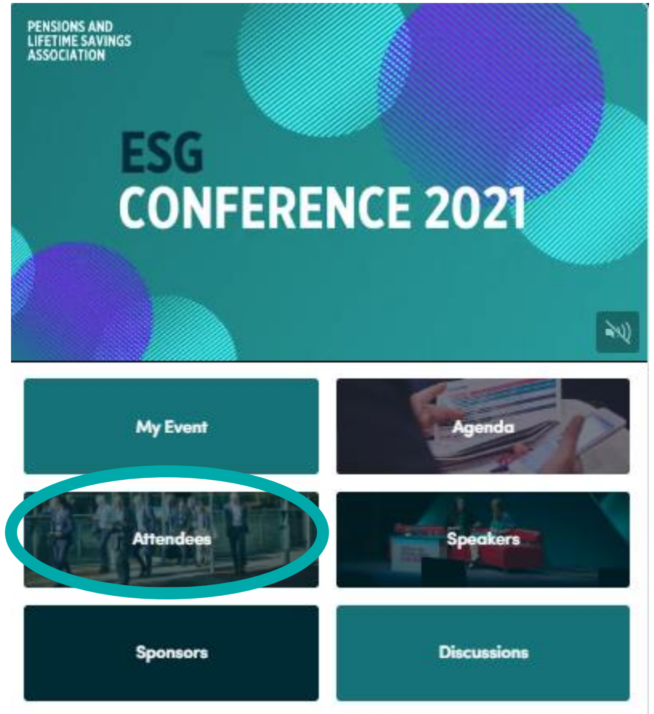
When an attendee submits a query to your stand, or someone connects with your team, they tacitly agree to share information with you. You therefore retrieve this information in accordance with the GDPR.

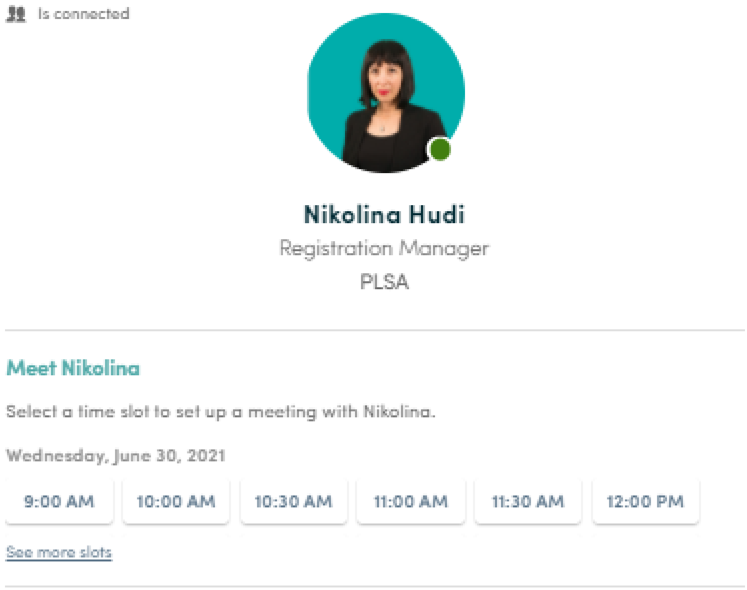
You can also export any contacts made yourself as an excel file by going to your contacts and clicking on "export".

HOW TO NETWORK

On the home page of the event, you can access to the **Speaker** and **Attendees** lists.

From here attendees can identify people of interest. Send them connection requests and schedule meetings.

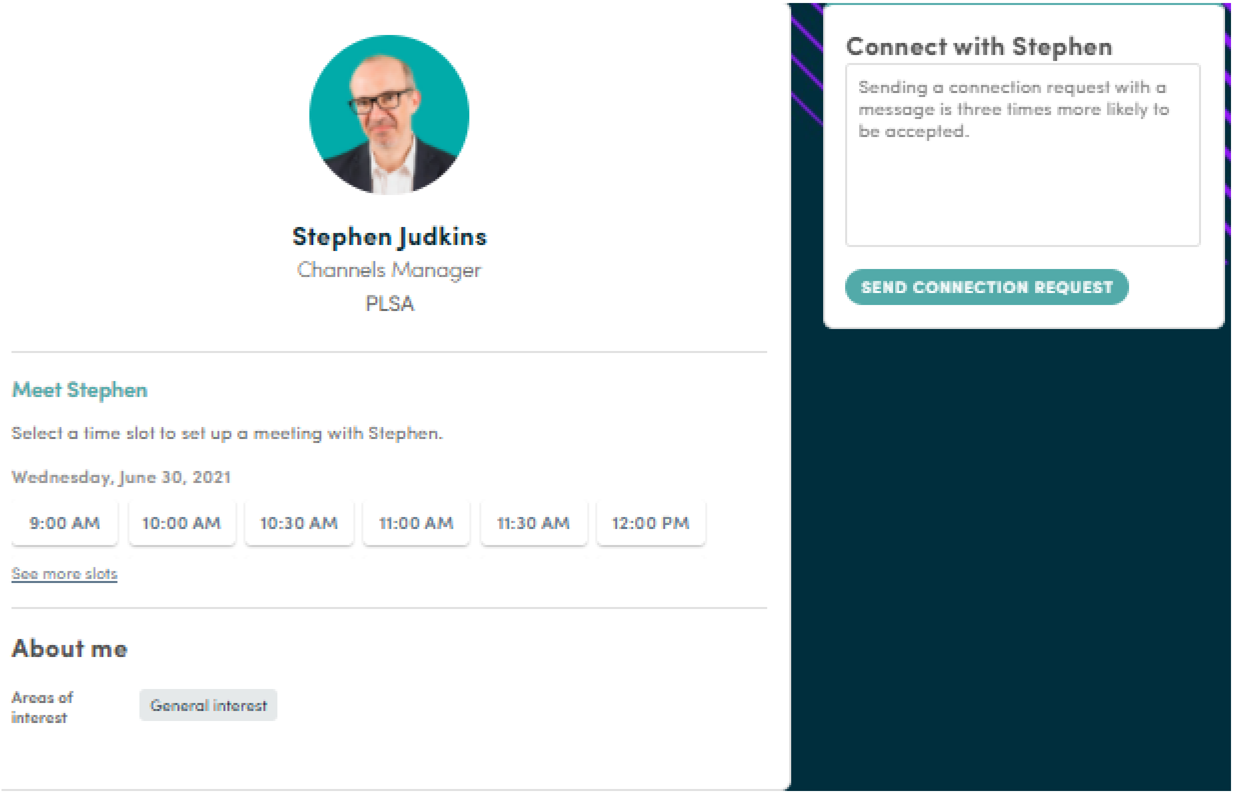




Available meeting time slots can be viewed on attendee profiles.

You can manage your own availabity from the «**My Event**» button

HOW TO MAKE A CONNECTION REQUEST



To send a connection request to a person, go to their profile (via the attendee or speaker list, or company profile and click on «SEND CONNECTION REQUEST».

Tip: We encourage you to write a message before sending your connection request to introduce yourself and explain the reason of your request.

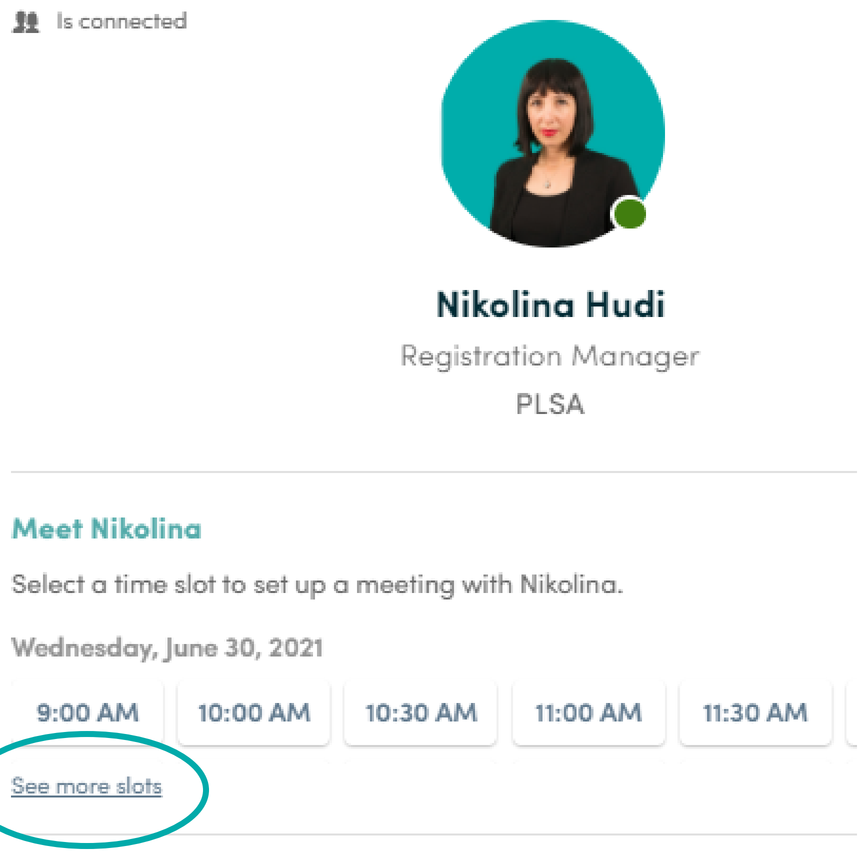
You will be able to find all the people you have been in contact by selecting «My Event» button and clicking on «My Networking» .

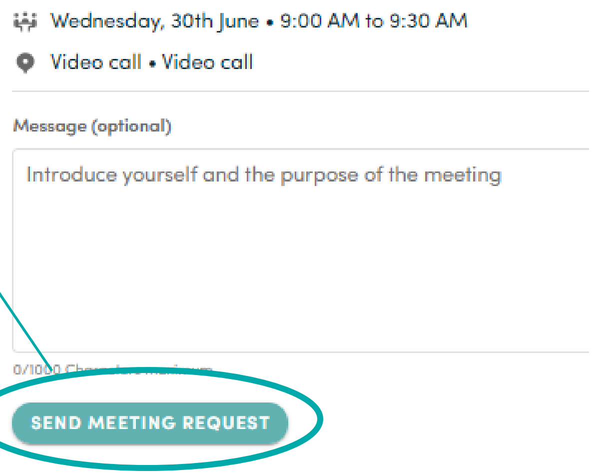
HOW TO REQUEST A MEETING

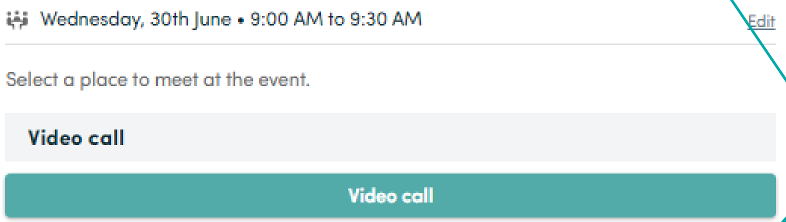
Step 1 : Go to a person's profile - by going to the list of attendees, speakers, or a sponsors' profile.

Step 2 : Click on one of the suggested meeting slots. If you want to see other slots, click on « See more slots ».

Step 3 : After selecting a slot, write a message to the person you want to meet. Once done, click on « SEND MEETING REQUEST ».







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