FTE/APEX/IFSA App & Attendee Engagement Platform

(FTE APEX IFSA in app store)

Sponsor and Exhibitor 'How To' Guide & Frequently Asked Questions

Overview

1. Accessing the app
2. Downloading the mobile app
3. Exhibitor Centre - Setting up your Exhibitor showcase
4. Exhibitor Centre – Linking your team members
5. Exhibitor Centre – Leads list and how to export.
6. Exhibitor Centre – Managing your booth meetings.
7. Front End – Arranging meetings
8. Front End – Lead retrieval
9. Front End – Managing my event

1 **Accessing the App:** All exhibitors and sponsors will receive access to the app a few weeks prior to launch. This early access is to enable your team to set up your personalised showcase.

**your colleagues who are helping manage your company's presence at the event but are not attending will also gain access for logistic purposes. This access will be limited to the exhibitor centre only, they will not see the attendee list or be able to organise meetings at the event.

How? A link will be sent out to you on the date of access. There are no set login details, each link is bespoke and auto linked to your registration details. If it is the first time accessing the app you will be prompted to create a password. Please log in using the email address you used for event registration, then create a password. The first communication you receive will direct you straight to the 'exhibitor centre'.

2. **Downloading the App.** Please ensure you download the app on your phone for onsite use. You can search your app store for: FTE APEX IFSA

3. **Exhibitor Centre. Setting up your Exhibitor Showcase.** This is a chance to get noticed – we advise you don't use generic company information. Think about why attendees should stop by your booth, what are you showcasing? Will you have demos? Any giveaways? A competition? Any news releases or launches?

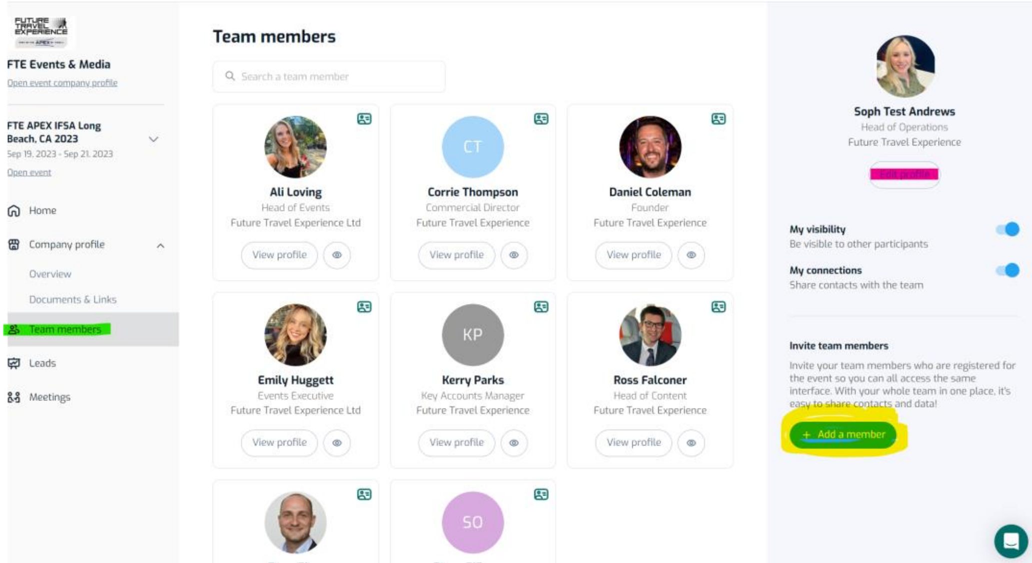
Your profile will be autofilled taking your listing from the event website – if you wish to update the copy use the edit button, check any specific information and select the interest areas tabs that fit your company profile so you are more visible in searches

****CATEGORIES makes up part of your profile -** This is important to complete as the categories you select will ensure your AI matches are relevant and attendees will also be able to filter by the selection. **

Social Media – How can attendees keep up to date with your latest news?

Provide links to your blog or social media accounts so that visitors can keep up with your latest news on LinkedIn, Twitter, Instagram, Facebook, YouTube, etc.

4. <u>Exhibitor Centre – Team Members</u>



The navigation list includes – **Team Members**. On this tab, you simply press **'+ Add a member**' to link a colleague to your showcase. Please note your colleague must be registered to attend the event. From registration to gaining access to the app can take up to 24 hours.

You can also edit your own profile in this section.

Should you need to change your name/job title, you can do so within the app, however, please also edit the details in your registration confirmation to ensure your badge gets printed correctly onsite.

What information in my profile is accessible by other participants?

Public profile information, accessible by all participants of the event:

- First Name
- Last Name
- Function
- Secondary function
- Company
- Biography
- Social Networks (if completed)

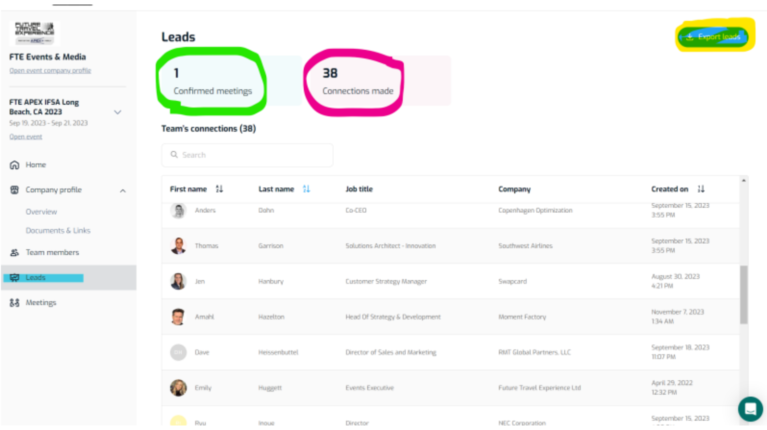
Private information, accessible by the participants with whom you are connected (connection or meeting request sent and accepted or received and accepted & badge scanned)

- First Name
- Last Name
- Function
- Secondary function
- Company
- Biography
- Social Networks (if completed)
- E-mail
- Telephone (if completed)
- Address (if completed)

5. Exhibitor Centre – Leads

Lead Retrieval Overview

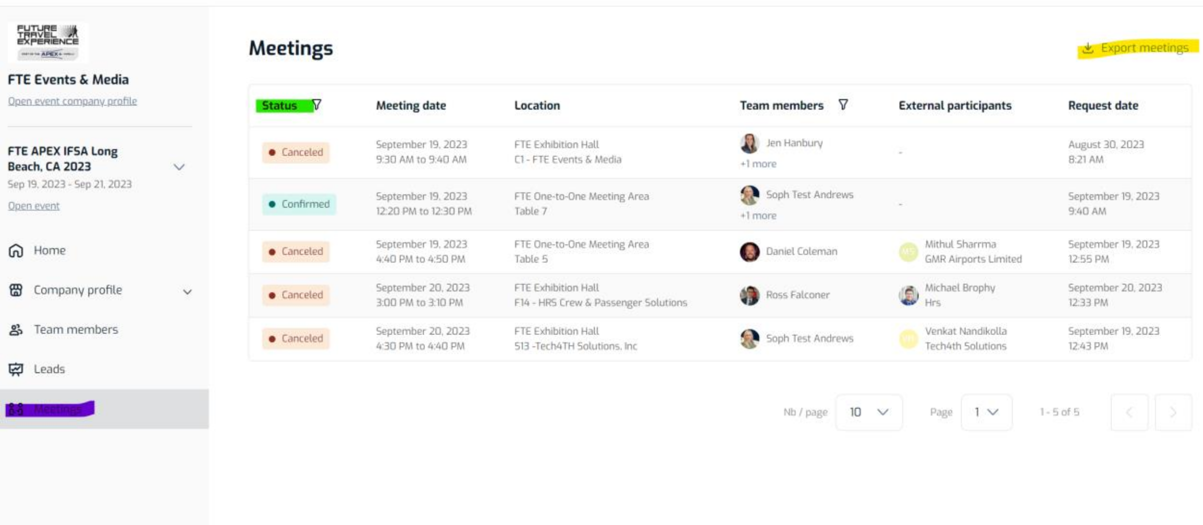
You can only gain access to the full attendee data of those who agree to connect with you. To connect with an attendee, you can either send a request (via their profile on the app) or via scanning their badge or app at the event. The app is AI powered so it will also suggest matches based on criteria and areas of interest you entered when you registered. The information gathered will depend on what the attendee has agreed to share and will show up in the exhibitor centre under 'Leads'. You also have the option to tag / add notes as you connect so you have a reference when following up later.



This list includes all yours and your teams' connections. You have the option to export this list into an excel spreadsheet. At the top of the page is a summary of your teams confirmed meetings and overall connections.

If you would like to see only your own personal connections this is done by going into your personal profile.

6. Exhibitor Centre – Meetings



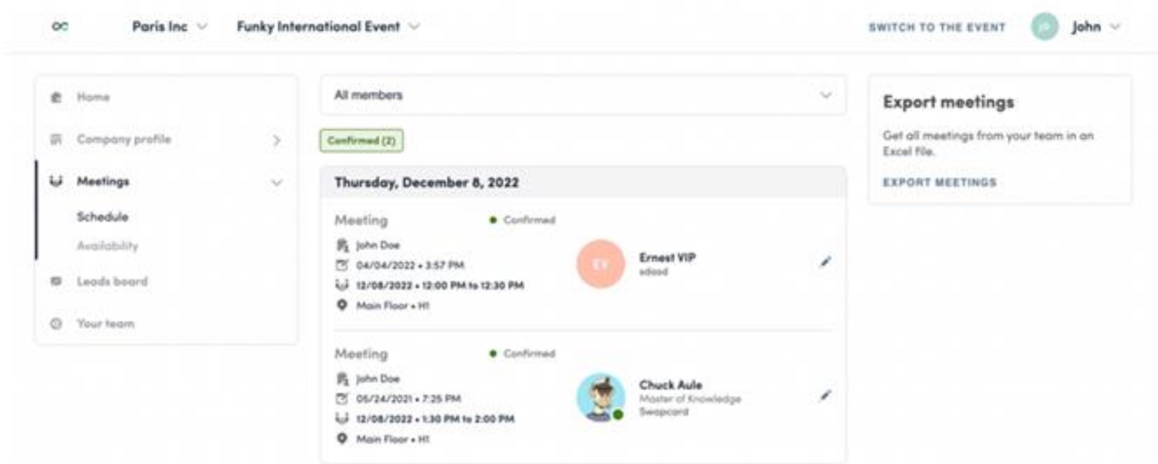
Here you can view all your teams' meetings and their status – confirmed, pending, cancelled. You can export a list and manage the attendance by selecting on a specific meeting and updating which team member will attend.

Meeting availability management for Exhibitors

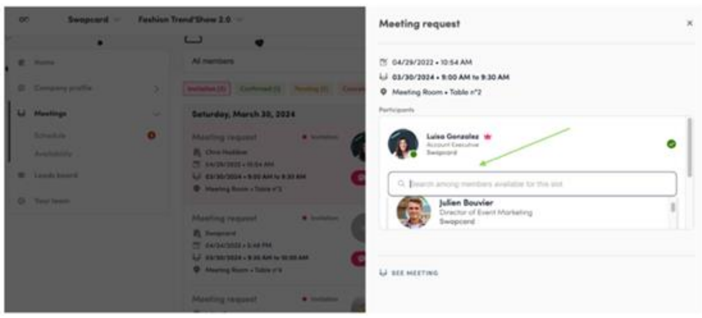
From the Exhibitor Centre, Exhibitors can specify the date and time they are available to meet with prospective clients.

Finding your Meetings

Event Participants can request meetings with Exhibitors. As an Exhibitor, when receiving a meeting request, you have the option to accept or decline it. All requests received will appear in the Exhibitor Centre's Meetings tab, as shown below:



Please note that for a Meeting to take place with an Exhibitor Booth, a Team Member needs to be assigned to said Meeting.



7. Frontend - Arranging Meetings

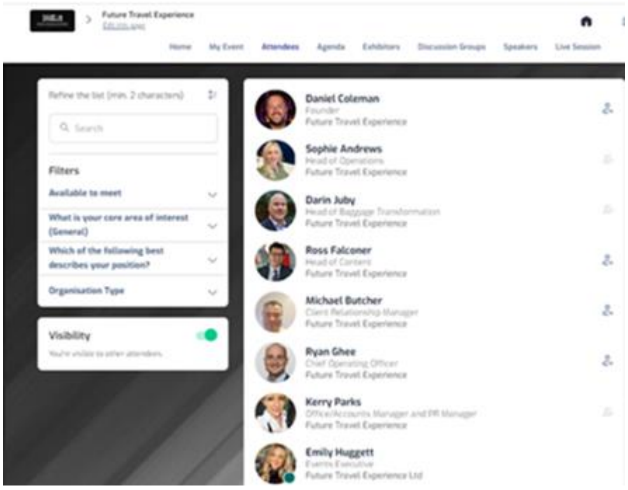
How to book a meeting with an Attendee?

Option 1

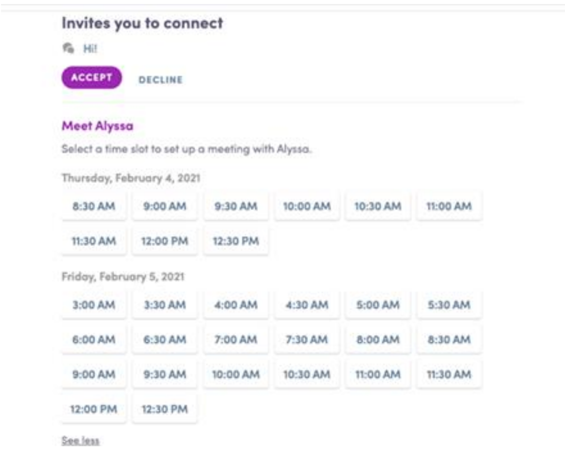
1. Go to a person's profile, by going to the list of participants.

2. Click on one of the proposed meeting slots. If you want to see other slots, click on see more slots.

3. After selecting a slot, choose a meeting place and write a message to the person you want to meet. Once done, click on "send meeting request."

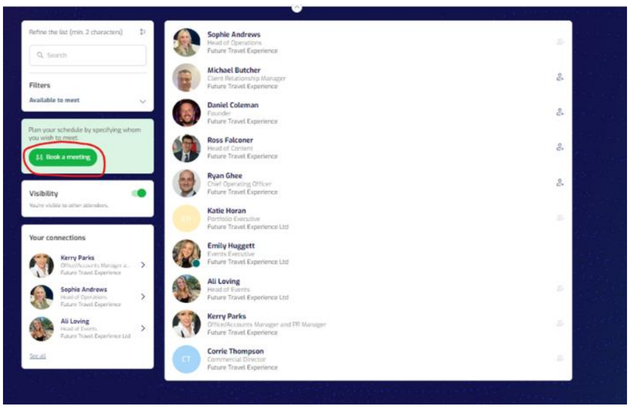


A pending meeting is blocking a meeting slot. If your meeting is not confirmed or refused after a few days, do not hesitate to cancel it to free up this meeting slot. If you want to make a change to the time or location of the meeting, you will need to cancel the existing meeting and send a new request



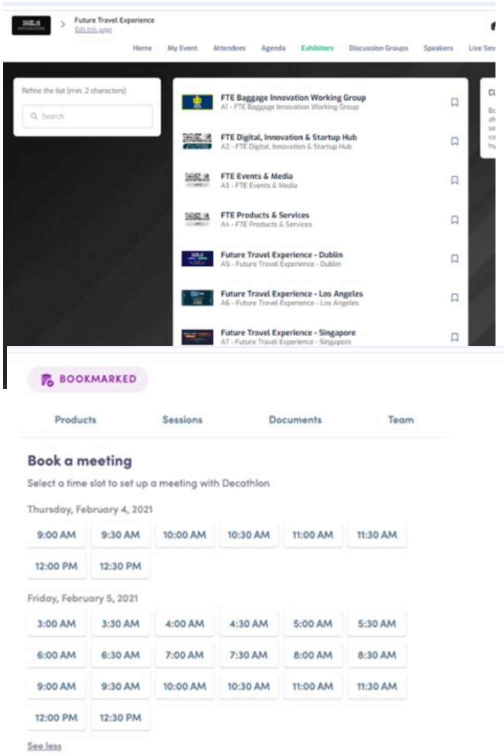
Option 2

1. Navigate to any People view



2. Click on the "Book a Meeting" button
3. Fill in the meeting details, including time and location

How to book a meeting with an Exhibitor?



- You can book a meeting with one of the members of an exhibiting company or you can book a meeting with the exhibiting company directly.

1. To do this, go to the page of an exhibiting company by going to the list of exhibitors:

2. Click on one of the proposed meeting slots. If you want to see other slots, click on see more slots.
3. After selecting meeting a slot, choose a meeting place and write a message if you wish. Once done, click on "send meeting request."

A pending meeting is blocking a meeting slot. If your meeting is not confirmed or refused after a few days, do not hesitate to cancel it to free up this meeting slot. If you want to make a change to the time or location of the meeting, you will need to cancel the existing meeting and send a new request.

8. Frontend - Lead Retrieval

Scan a QR Code

1. Click the ‘Scan’ icon on the lower right corner of the event home page.
2. In the first tab, you will have the option to scan QR codes.
3. As soon as you scan the QR Code on an attendee's badge or app, their contact details will be shared with you and the person will be added to your contacts.

Scan a Business Card

1. Click the ‘Scan’ icon on the lower right corner of the event home page.
2. In the second tab, ‘Card’, you will have the option to scan business cards.
3. The app will take a picture of the business card that will be saved as a contact, and you will be prompted to a prefilled contact form. You will have the opportunity to check the contact information collected and add relevant information, such as the lead score or notes to remember details of that first interaction with the attendee.

Should an attendee want to scan your QR code, this can be found either on your physical attendee badge (sent pre-event) or via the ‘My QR code’ button shown in the above image.

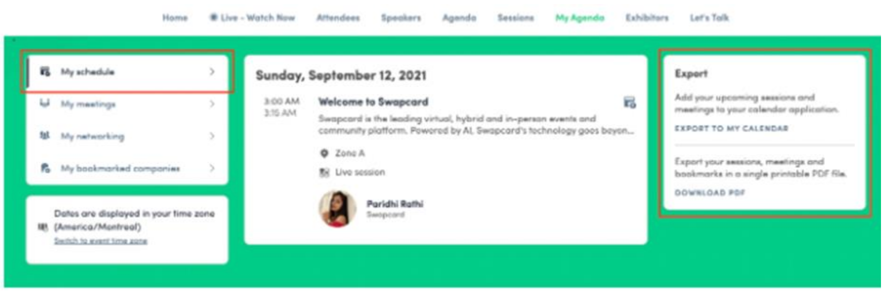
9. Managing the ‘My Event’ button

The ‘My Event’ button can be used to manage your meetings, easily find bookmarked sessions and exhibitors as well as all the contacts you have made for this event.

1. My schedule

The first tab of ‘My Event’ allows you to see the ‘Sessions’ you have bookmarked or registered to from the ‘Agenda’ button (the actual name can vary on each event). You have two options for the schedule:

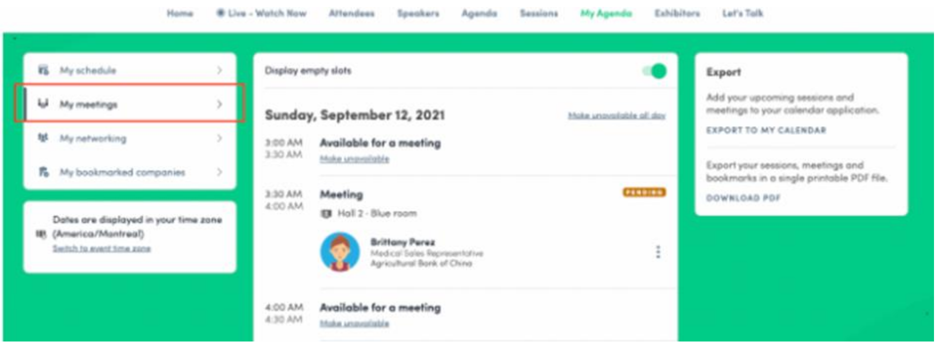
- Export to my calendar
- Download PDF



2. My meetings

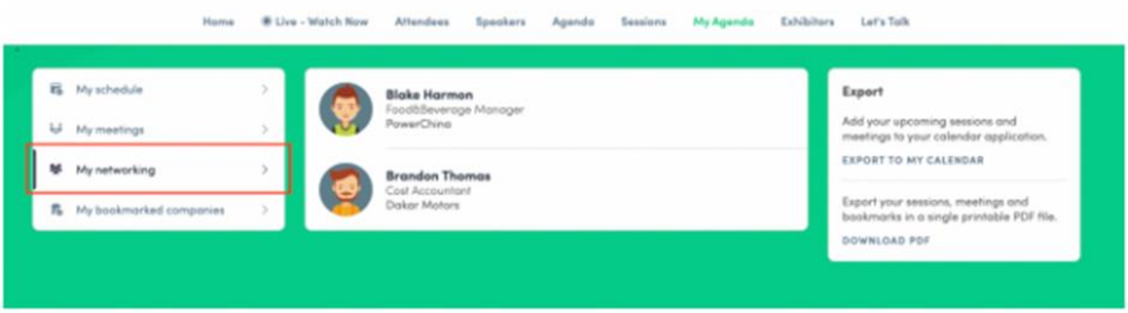
This tab allows you to visualise and manage all your ‘Meetings’ (both confirmed and pending). Similarly, to the ‘My Schedule’ tab, you have two options for your ‘Meetings’:

- Export to my calendar
- Download PDF



3. My networking

Here you will be able to find a complete list of all connections you have made with fellow attendees of the event. In this list, you will find all those with the status “Is connected” (they/you have accepted the connection request) and “pending” (awaiting for their response on your connection request).



4, Bookmarking ‘Sessions’ – ‘My Event’

Before, during, and after an event, you can bookmark ‘Sessions’. With this, you can quickly access them under the ‘My Event’ button.

How to bookmark ‘Sessions’:

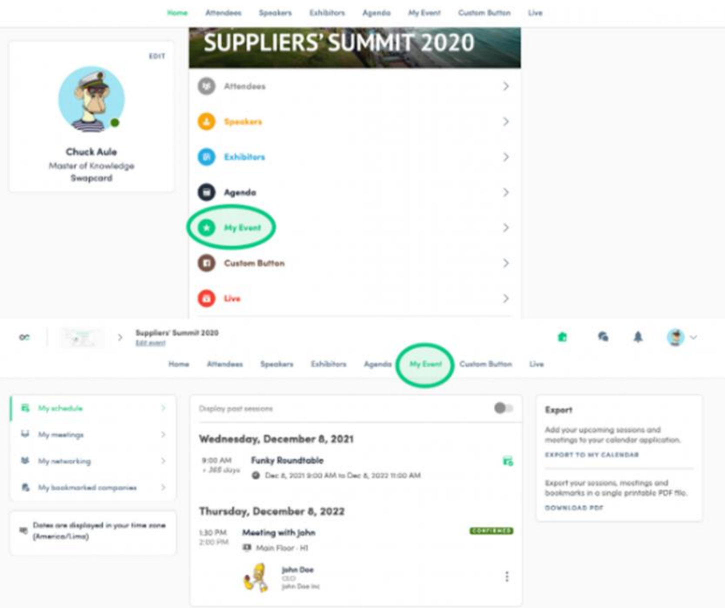
To bookmark a ‘Session’, you simply need to click on the dedicated icon located on the Session's page. Once bookmarked, the grey icon will change colour to highlight such actions.

2. **Bookmarking ‘Sessions’ – ‘My Event’**

Before, during, and after an event, you can bookmark ‘Sessions’. With this, you can quickly access them under the ‘My Event’ button

How to find bookmarked ‘Sessions’?

In the app, a button is displayed on both the ‘Event Home’ and the top navigation bar, as shown below. Clicking on the ‘My Event’ button displays all the ‘Sessions’ previously bookmarked by you as an attendee. Your booked ‘Meetings’ will also be listed there, in chronological order.



3. Exporting my meetings, schedule, and bookmarks

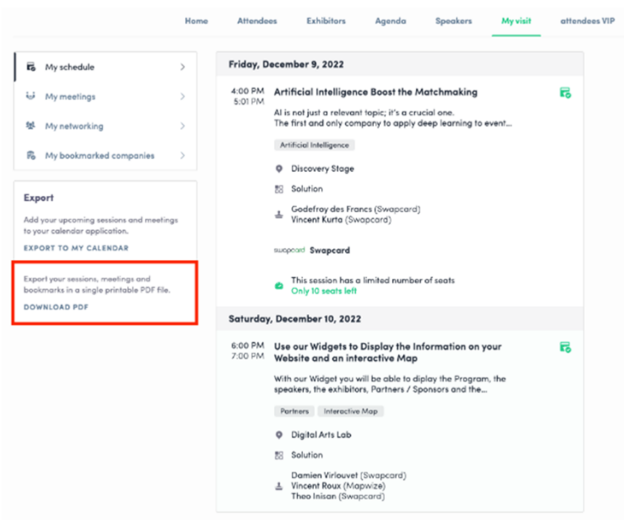
It is possible to export your confirmed meetings as well as the sessions you have bookmarked and add them to your own agenda on your device, or to print them out.

Exporting your Swapcard calendar

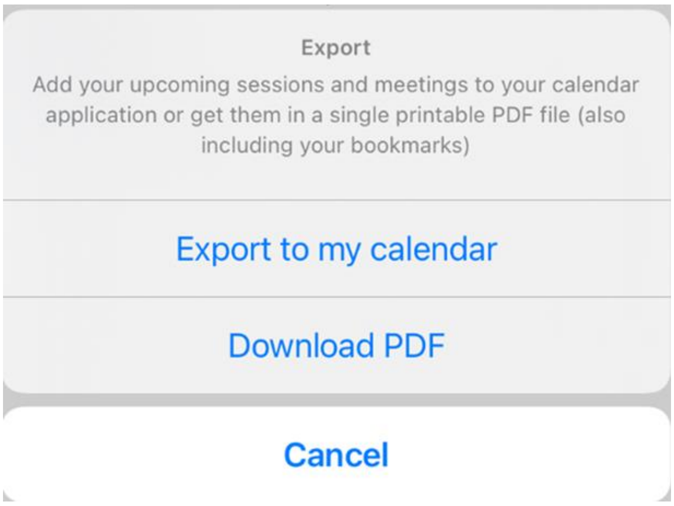
In the event, select ‘My Event’ (the actual button name may change depending on the event, i.e. My Schedule). Once there, go to ‘My schedule’ or ‘My meetings’.

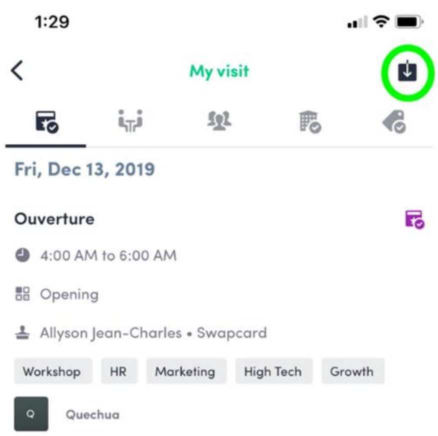
On the web app: You can export your meetings, schedule, networking, and bookmarks as a PDF by clicking on Download PDF.

Otherwise, click on ‘Export to my calendar’ to download an ICS file with your event data.



On the mobile app: Select the Download icon at the top-right corner of your screen. Choose between 'Export to my calendar' to download an ICS file, or 'Download PDF', to receive your data in a printable PDF format.





The download button is available in all sections of your 'My event' tab (My schedule, My meetings, My networking, My bookmarks, My videos, and My Wishlist).

4. Importing the ICS file to your own calendar

Once you have exported your event data using the steps above, you will need to decide which calendar you want to import your Swapcard calendar into. Here you can find instructions for three of the most used calendars:

Google Calendar

On Google Calendar > Open your Settings > select Add calendar > Import & export > select the previously downloaded ICS file > click on Import

On Mac

Download the ICS file to your desktop. Double-click on it to open your Calendar application, then select the personal Calendar you want to sync your events with.

Outlook calendar

Open Outlook > select File > Open & export > Import/export > in the Import/Export Wizard box, choose Import an iCalendar > select file > click OK and Import