

**PENSIONS AND
LIFETIME SAVINGS
ASSOCIATION**

PLSA CONFERENCES

**EXHIBITOR
GUIDE**

swapcard

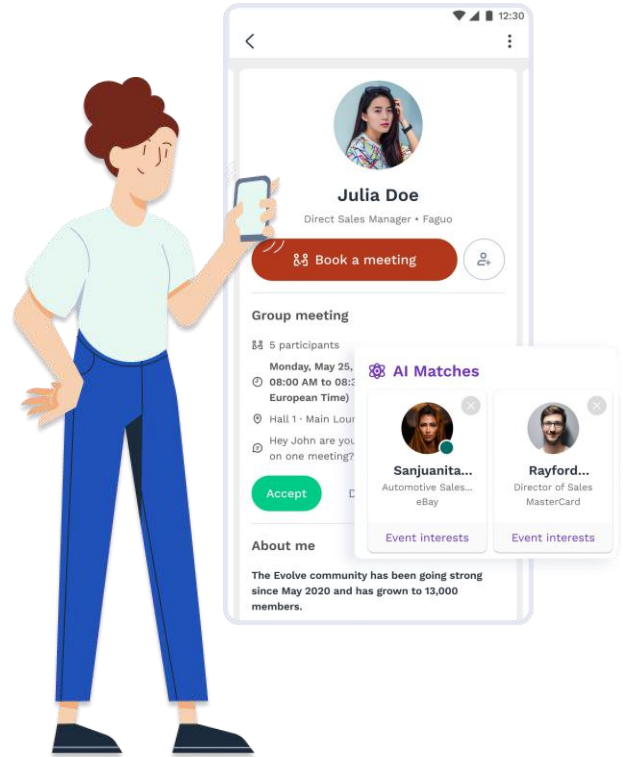
3. Introduction
4. Login instructions
5. Accessing the Exhibitor Center
6. Front-view of an example Exhibitor profile
7. Profile set-up: Company information
8. Profile set-up: Logo, header and background
9. Profile set-up: Advertising
10. Profile set-up: Documents and links
11. Graphic guidelines
12. Exhibitor profile QR code
13. Accessing the attendee list
14. How to make a connection request
15. How to create a group chat
16. Manage your own meetings availability
17. How to request a meeting with an attendee
18. Book a meeting with multiple participants
19. Managing meetings in the Exhibitor Center
20. Exhibitor profile chat box
21. Lead capture set-up
22. Exporting leads
23. Exhibitor Center in the PLSA Events app
24. Support

Welcome to the Exhibitor Guide

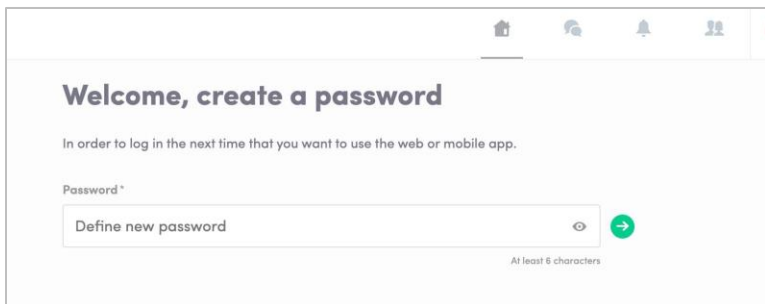
The aim of this guide is to assist with the configuration of your **interactive profile** in the **PLSA Events app** which is powered by **Swapcard**.

The profile also appears on the PLSA website.

In the **Exhibitor Center** you can add your company information, branding, documents and links, as well as manage your team, and interact with attendees before, during and after the event!



You will receive an email similar to the right with a button redirecting you to a login page or you can visit <https://app.swapcard.com/c/plsa> and then click 'Log in'. Enter your email address and you will then be prompted to create a password for your account:



The screenshot shows a web browser interface with a navigation bar at the top containing icons for home, refresh, notifications, and user profile. The main content area has the heading "Welcome, create a password" and a sub-heading "In order to log in the next time that you want to use the web or mobile app." Below this is a "Password*" label and a text input field with the placeholder "Define new password". To the right of the input field are an eye icon and a green arrow icon. Below the input field, it says "At least 6 characters".

You can also access the event from a mobile device by downloading the PLSA Events app ([iOS](#)/[Android](#))



The email content is displayed within a white-bordered box. At the top is a header image with a pink speech bubble overlay. The text inside the speech bubble reads: "PENSIONS AND LIFETIME SAVINGS ASSOCIATION", "INVESTMENT CONFERENCE", "27-29 FEBRUARY 2024 | ECC, EDINBURGH". Below the image is the heading "PLSA Investment Conference 2024". The body text reads: "Hello Beatriz,", "The PLSA Events app is now live.", "The app is your go-to resource in the lead up to and during this year's Investment Conference. Check the programme for updates and register for sessions you want to see.", "To get started, click on the button below.", "Please note: this link will expire in 48 hours. If the link has expired, simply enter your email address and follow the steps.", "Check out the [PLSA privacy notice](#)." At the bottom right is a teal button with the text "GET STARTED!" in white.

Note: If you don't see this email in your mailbox, please check your spam folder. Most of the emails are sent from noreply@swapcard.com or events@plsa.co.uk

Log in to PLSA on Swapcard: <https://app.swapcard.com/c/plsa>

The screenshot shows the Exhibitor Center interface for the PLSA Investment Conference 2024. The top navigation bar includes links for Home, My Event, My QR Code, Agenda, Speakers, Attendees, PLSA Team, Exhibitors & Sponsors, Resources, Venue Layout, and Exhibition Floor Plan. A user profile dropdown menu is visible in the top right corner. The main content area features a user profile for Rebecca Moessi, Events Technical Manager at PLSA, with an 'Edit' button. Below the profile is a section for editing company information. The central part of the interface displays the event details: 'INVESTMENT CONFERENCE' from 27-29 February 2024 at EICC, Edinburgh. A grid of navigation buttons includes 'My Event', 'My QR Code', 'Agenda', 'Speakers', 'Attendees', and 'PLSA Team'. A large pink arrow points to the 'Exhibitor Center' button in the top navigation bar. On the right, there is a 'THANK YOU TO OUR APP SPONSORS' section featuring logos for AEGON Asset Management and PGIM Bank Asset Management, along with the hashtag #PLSAInvest24.

There are three main ways to access the Exhibitor Center:

1

By clicking the button in your **invitation email**, which will redirect you to the **Exhibitor Center**.

2

Click '**Exhibitor Center**' in the drop down menu.

3

Click on your Exhibitor profile from the home page on the left.

FRONT-VIEW OF AN EXAMPLE EXHIBITOR PROFILE

Exhibitor ad



Video or image header



isio. **Isio**
Interactive Sponsor Profiles
📍 Exhibition hall, Stand 612

Bookmark

Sessions Documents & Links Team

Information

Isio challenges tradition to give their clients the financial confidence they deserve. Established in 2020 and headed by the expertise of Premier Business Management is

Company information



Customised background

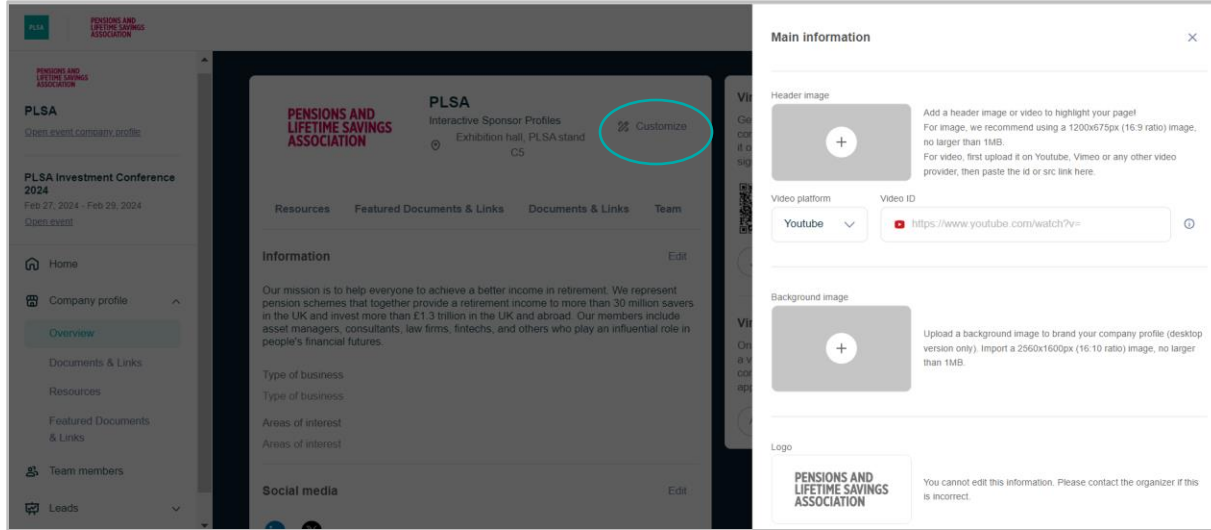
PROFILE SET-UP: COMPANY INFORMATION

The screenshot shows the PLSA Exhibitor Center profile setup page. The page is divided into a left-hand navigation menu and a main content area. The navigation menu includes options for Home, Company profile, Overview, Documents & Links, Resources, Featured Documents & Links, and Team members. The main content area displays the PLSA profile with a title, logo, and mission statement. An 'Edit' button is circled in red. To the right, there is a 'Virtual booth QR code' section with a QR code and a 'Download QR code' button, and a 'Virtual booth advertising' section with an 'Add an ad' button.

We recommend you complete your profile as fully as possible to engage delegates. Click **'Edit'** and fill in all the editable information in the Exhibitor Center.

Some fields are managed by the organiser so if a field is not editable please contact the PLSA Events Team. 7

PROFILE SET-UP: LOGO, HEADER, AND BACKGROUND



Exhibitor logo

Please supply a full colour and white-out high-resolution logo in eps, ai or transparent png file format to the PLSA Events Team who will upload the logo on your behalf.

If a field is **greyed out**, it indicates that only the organiser can edit it.

Click '**Customise**' to add a header image or video header and a custom background.

Header image or video

Upload an image 1200x675px jpg or png, no larger than 1MB. or add a video url hosted on YouTube or Vimeo, or add an iFrame.

Background image

Upload an image 2560x1600px jpg or png, no larger than 1MB

PROFILE SET-UP: ADVERTISING

PENSIONS AND LIFETIME SAVINGS ASSOCIATION **PLSA**
Interactive Sponsor Profiles [Customize](#)

Resources Featured Documents & Links Documents & Links Team

Information [Edit](#)

Our mission is to help everyone to achieve a better income in retirement. We represent pension schemes that together provide a retirement income to more than 30 million savers in the UK and invest more than £1.3 trillion in the UK and abroad. Our members include asset managers, consultants, law firms, fintechs, and others who play an influential role in people's financial futures.

Type of business
Type of business

Areas of interest
Areas of interest

Virtual booth QR code
Get the QR code that is redirecting to your company page in the event app, to display it on your onsite booth or in your email signature.

[Customize](#)

[Download QR code](#)

Virtual booth advertising
On web desktop, the image is displayed in a vertical banner ad on the left side of your company profile. On mobile, your ad appears at the bottom of it.

[Add an ad](#)

Click on **'Add an ad'** to add an advert.

Upload an image 1080x1920px jpg, png or gif and no larger than 1MB.

You can include a link to an external website.

Add an ad [×](#)

* Image
 Import a 1080x1920px (9:16 ratio) image, no larger than 1MB.

* Redirection
External URL [▼](#)

* URL
https://www.swapcard.com

[Create the ad](#)

The screenshot displays the PLSA Investment Conference 2024 profile setup interface. On the left is a navigation menu with options: Home, Company profile (with sub-items Overview, Documents & Links, Resources), Featured Documents & Links (highlighted), Team members, and Leads. The main content area features a search bar and a list of four featured items, each with a cover image, title, and 'PLSA' attribution:

- Putting the Spotlight on Social Factors - Best Practise Case Studies** (PLSA)
- Viewpoint Spring 2024** (PLSA)
- Secure Income Made Simple Guide** (PLSA)
- Five Steps to Better Pensions: Time for a New Consensus** (PLSA)

On the right, the 'Manage featured documents & links' panel includes a description: 'Here is the list of the items inside the Items Type. Select which one you want to make visible on this specific event.' It has a 'Display hidden items' toggle (currently on) and a 'Featured Documents & Links (0)' section with an 'Add' button.

Note: The cover image should be at least **400x400px** (1:1 ratio) and no larger than 1MB.

We recommend **'Featured Documents & Links'** which require a cover image to highlight them. **Paste a link** (with <http://> or <https://>) or **import a file** (pdf, doc, docx, ppt, pptx, png or jpg), then add a name and a short description of what it is. If the url is long, we suggest using a url shortener. You may also want to add tracking to your url.

If you do not have a cover image, then add in the **'Documents & Links'** section instead.

Exhibitor logo (managed by the event organiser)

- Please supply a full colour and white-out high-resolution logo in eps, ai or transparent png file format to the PLSA events team who will upload the logo on your behalf.

Header

- Image: 1200x675px jpg or png (16:9 ratio) and no larger than 1MB
- Video: hosted on Vimeo or Youtube. Ask us if you host the video on another tool.
Note: the video will be muted by default

Profile background

Rectangular image (16:10 ratio), size of 2560x1600px jpg or png and no larger than 1MB

Advertising

Rectangular image (9:16 ratio), size of 1080x1920px jpg, png or gif and no larger than 1MB

Documents and links

- Paste a link or import a file (pdf, doc, docx, ppt, pptx, png, jpg) and no larger than 30 MB
- Title: max 80 characters
- Description: max 160 characters
- Highlight featured documents and links with a 400x400px jpg or png (1:1 ratio) image, no larger than 1MB

The screenshot displays the Swapcard Hybrid Platform exhibitor profile. On the left is a navigation menu with options like Home, Company profile, Overview, Documents & Links, Products & Services, Prizes & Giveaways, Digital Library, Job Board, Team members, Leads, and Meetings. The main content area features a header with the Swapcard logo and 'Swapcard Hybrid Platform' title. Below this is a QR code for the virtual booth, with a 'Customize' link and a 'Download QR code' button. The right-hand side section, titled 'Virtual booth advertising', shows a dark card with the Swapcard logo and a call to action: 'Want to learn more? Use the chat box on the right-hand side or contact a Swapcard'. An arrow points from the text on the right towards the QR code area.

As an Exhibitor you can download your virtual booth QR code to display on your physical stand or in digital or print materials.

Delegates can scan the QR code to view your company details in the PLSA Events app, download your resources, start a chat, or request a meeting. Plus, your organisation will be automatically listed in their **My Event** → **My bookmarked companies**.

ACCESSING THE ATTENDEE LIST

Access the **Attendees** tab for the full delegate list.

From here you can make connections, send messages, video call and book meetings.

You can also do the same for Speakers and the PLSA Team.

The main interface shows a list of attendees with the following sections on the left:

- Full text search:** A search bar with the placeholder "Refine the list (min. 2 characters)" and a search icon.
- Attendee filters (such as role, interests, organisation type):** A section with "Filters" and "Areas of interest" dropdown menus.
- Book a meeting:** A button labeled "Book a meeting" with a calendar icon.
- Visibility:** A toggle switch labeled "Visibility" with the text "You're visible to other attendees." and a blue toggle.
- Existing contacts:** A section titled "Your connections" showing a contact card for Jessica Davies, Events Manager at PLSA.

The main grid displays the following attendees:

- Joe Dabrowski, Deputy Director - Policy, PLSA
- Jessica Davies, Events Manager, PLSA
- Frank Day, Events Content Creator, PLSA
- Jon Echevarria, Policy Lead, PLSA
- Maria Espadinha, Policy Lead, PLSA
- Kate Hadley, Director of Events and Training, PLSA
- Nikolina Hudi, Registration Manager, PLSA
- Marie Lake, Senior Marketing Manager, PLSA
- Helen Lamb, Senior Membership..., PLSA

On the right, a navigation menu for the "LOCAL AUTHORITY CONFERENCE" (11-13 JUNE GLOUCESTERSHIRE) includes buttons for "My Event", "My QR Code", "Agenda", "Speakers", "Attendees" (circled in red), and "PLSA Team". A callout "Add a new contact" points to a plus icon in the top right corner of the attendee grid.

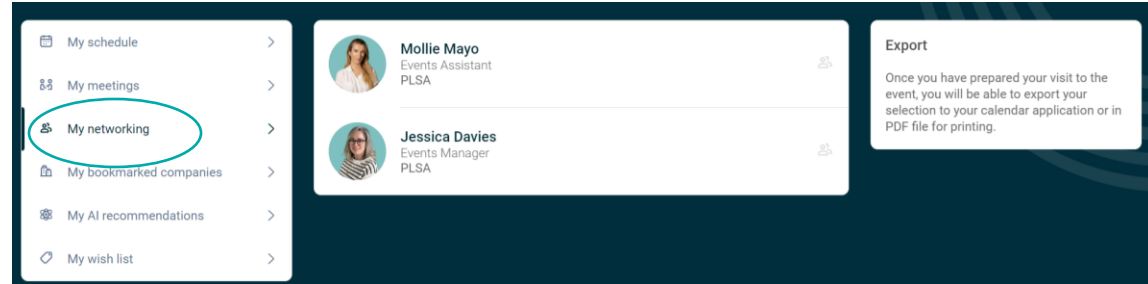
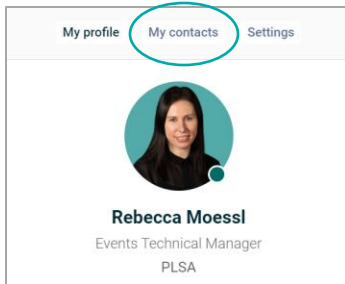
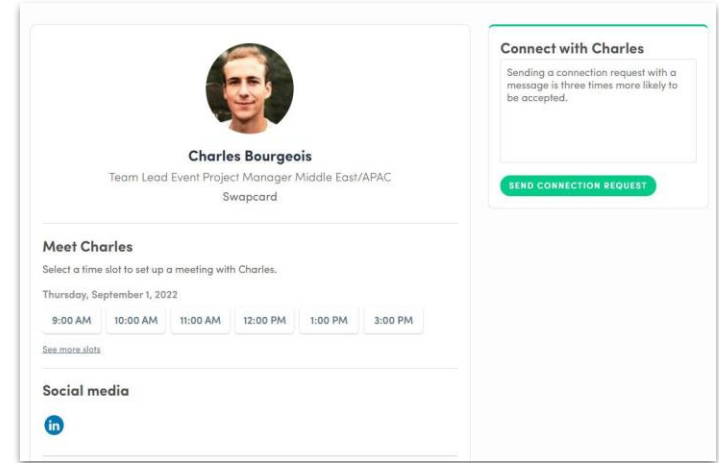
HOW TO MAKE A CONNECTION REQUEST

Go to an attendee's profile via the list of attendees, speakers or a company profile and click on

Send connection request

We encourage you to write a message before inviting them to connect to introduce yourself and explain the reason for your request.

You will be able to find all the people you have been in contact with from **“My contacts”** tab above your **profile** picture, or in the **“My Event”** button in **My Networking** tab.



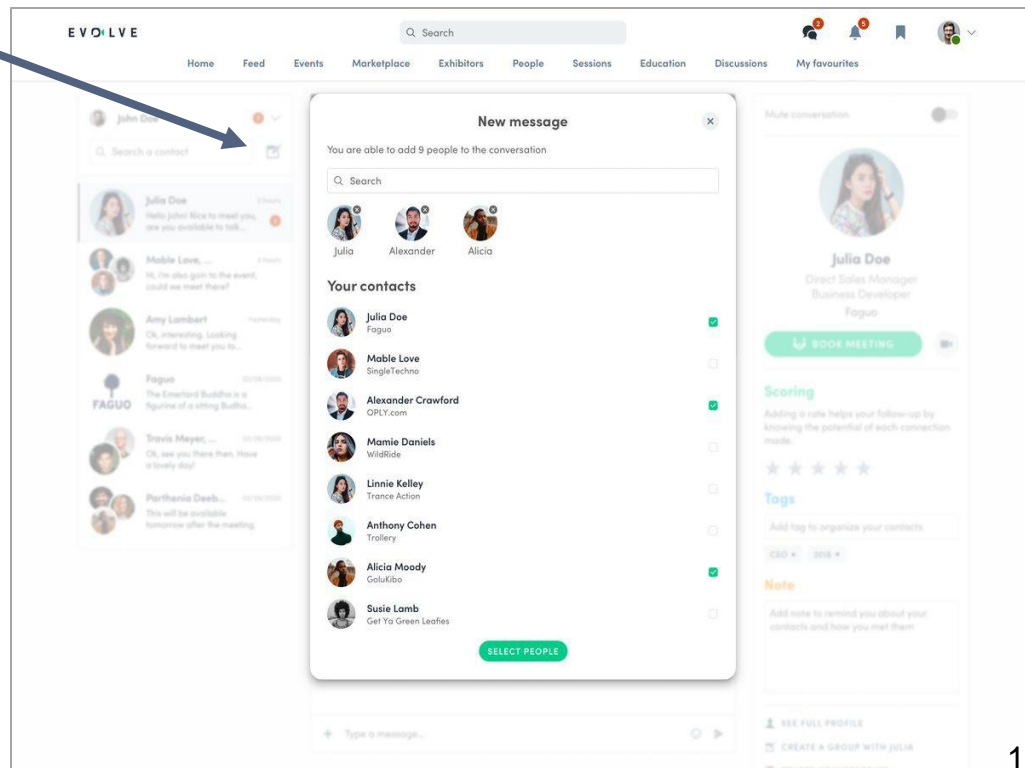
HOW TO CREATE A GROUP CHAT

The Group Chat feature gives attendees the ability to engage in a discussion with up to 10 people. It also allows them to send messages, files, reactions, and even have group video calls.

To create a group chat, click on the message icon to the right of "search a contact" then add the list of people from your contacts list you want to include in your group.

By default, the person creating the group chat is the Admin. This will give them the rights to:

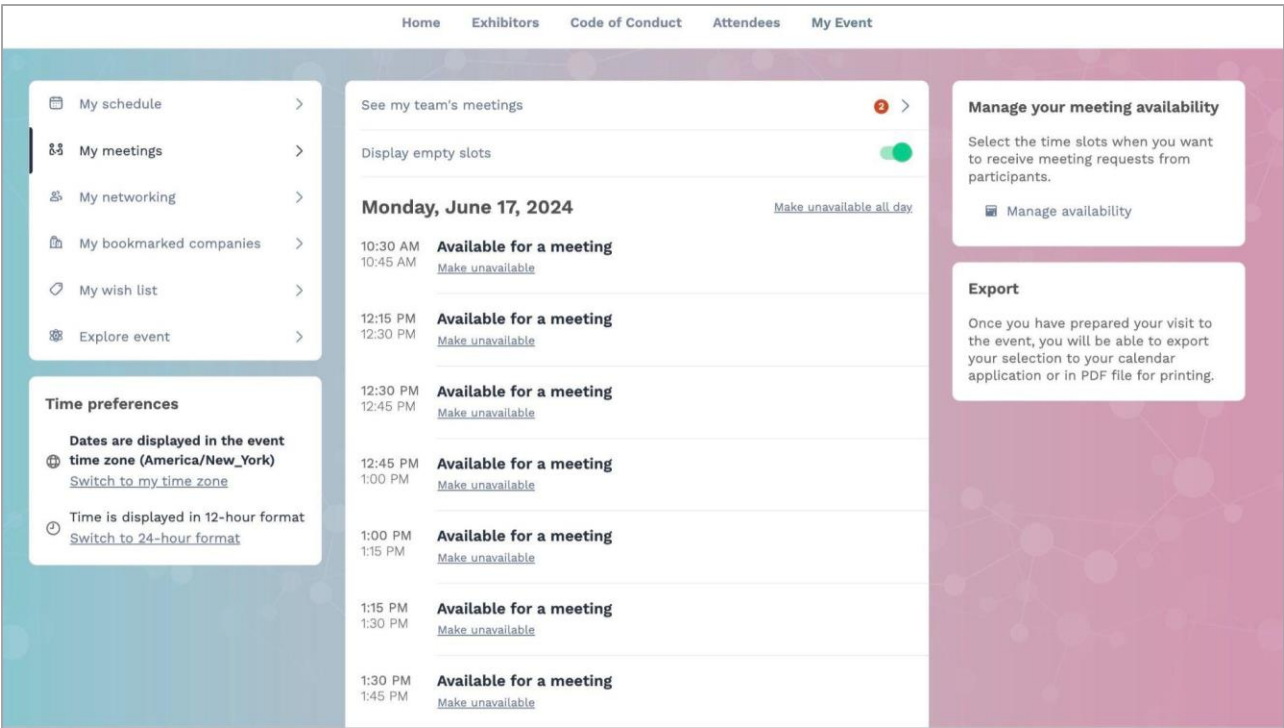
- Add and remove members
- Rename the conversation
- Assign or demote other Admins
- End the conversation



MANAGE YOUR OWN MEETINGS AVAILABILITY

Go to **My Event** and then **My Meetings** where you will find the **Manage availability** option.

Once you click on **Manage availability**, you will see a list of all the available Meeting Slots in the networking periods. You simply need to de-select the slots that you want to make yourself unavailable.



HOW TO REQUEST A MEETING WITH AN ATTENDEE

1 Open an attendee's profile by going to the list of attendees, speakers, or a company profile.

2 Select one of the suggested meeting slots. If you want to see other slots, click **“See more slots.”**

Charles Bourgeois
Team Lead Event Project Manager Middle East/APAC
Swapcard

Meet Charles
Select a time slot to set up a meeting with Charles.

Thursday, September 1, 2022

9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 3:00 PM

[See more slots](#)

3 Select a Meeting location.

Location

Charles Bourgeois

Thursday, September 1, 2022 1:00 PM to 2:00 PM (Europe/Paris)

ONLINE

General meetings

4 Write a message to accompany your meeting request, then click **“Send meeting request”**

Add a message

Charles Bourgeois

Thursday, September 1, 2022 1:00 PM to 2:00 PM (Europe/Paris)

ONLINE - General meetings

Message (optional)
Introduce yourself and the purpose of the meeting

0/1000 Characters maximum

SEND MEETING REQUEST

BOOK A MEETING WITH MULTIPLE PARTICIPANTS

Book a meeting

Refine the list (min. 2 characters) ↑

Search

Filters

Areas of interest

Unlock new opportunities by optimizing your schedule with meeting requests

1 Book a meeting

Joe Dabrowski
Deputy Director - Policy
PLSA

Jessica Davies
Events Manager
PLSA

Frank Day
Events Content Creator
PLSA

2 Select participants

You can add up to 7 participants to the meeting

Search people

Charles Oriana

Your contacts

Charles Bourgeois
Swapcard

Oriana Rainuzzo
Swapcard

Daniel Neves
Música & Mercado

Hannes Huyghe
Busworld

Davide Petilli
Swapcard

See more

More potential connections

Angelika Lichnerova

Next

3 Date & time

Feb 2025

Thursday, February 13

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

Dates are displayed in your time zone (Europe/Paris)
[Switch to event time zone](#)

2:00 PM	2:00 PM
30 mins	30 mins
2:00 PM	2:30 PM
30 mins	30 mins
2:30 PM	2:30 PM
30 mins	30 mins
3:00 PM	3:00 PM
30 mins	30 mins

4 Location

LLamada virtual

Media Center

Virtual

Video call - 1

VIP Room

Room 1

Room 2

Room 3

Room 4

Room 5

Video call

Virtual Meeting

Meeting Room

Table n°1

Table n°10

Table n°2

The screenshot shows the Swapcard Hybrid Platform interface. On the left is a navigation sidebar with options: Home, Company profile, Team members, Leads, Meetings (circled in red), and Referral program. The main content area displays a 'Meetings' table with columns for Status, Meeting date, Location, Team members, External participants, and Request date. A notification at the top states 'There are 2 pending invitations awaiting your response.' Below the table, a 'Meeting details' modal is open for a pending invitation on June 17, 2024, from 12:30 PM to 12:45 PM at the Exhibit Booth. The modal shows team members (Giovanna Grasso) and external participants (John Francis Reddickins) with status indicators (Accepted, Declined, Pending).

Status	Meeting date	Location	Team members	External participants	Request date
Pending	June 17, 2024 10:30 AM to 10:45 AM	Exhibit Booth	Jessica Culp	-	April 23, 2024 7:19 AM
Confirmed	June 17, 2024 12:30 PM to 12:45 PM	Exhibit Booth	Giovanna Grasso	John Francis Reddickins	April 23, 2024 7:18 AM
Invitation	June 17, 2024 12:45 PM to 1:00 PM	Exhibit Booth	Unassigned	Jessy Watson Rebecca Minkoff	April 23, 2024 11:11 AM

The 'Manage your meeting slots availability' dialog box allows users to select time slots for receiving meeting requests. It shows a calendar for Monday, June 17, 2024, with slots for 10:30 AM, 12:15 PM, 12:30 PM, 12:45 PM, 1:00 PM, 1:15 PM, and 1:30 PM, each for 15 minutes. Below the calendar, there are dropdown menus for Tuesday, June 18, 2024, and Wednesday, June 19, 2024.

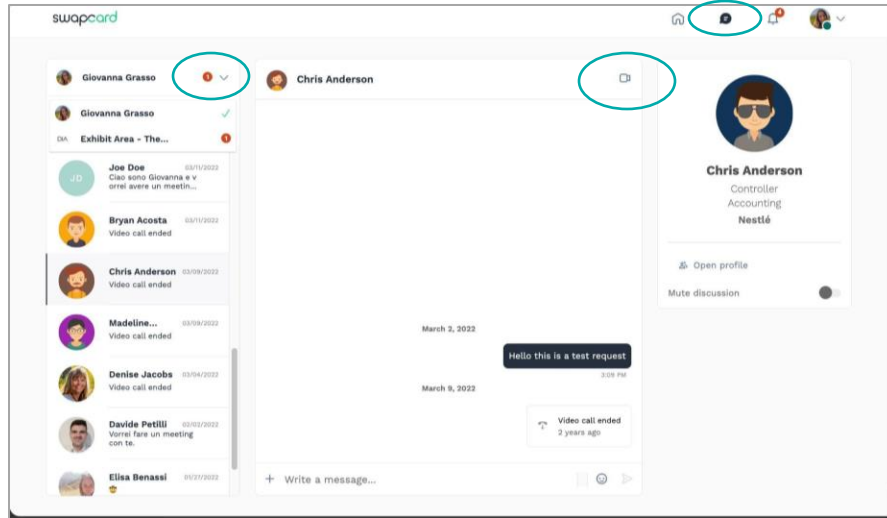
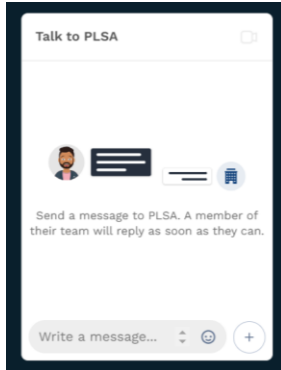
1. **Manage your availability** (you just need to unselect the time slots where you are not available)
2. **Assign a meeting:** reply to the meeting request and select a team member to assign.
3. **Accept or decline** meeting requests or cancel an existing meeting.
4. **Filter meetings by status:** Pending, Confirmed, Cancelled or Declined.
5. **Export** the full list of meetings.

EXHIBITOR PROFILE CHAT BOX

As a team member in the interactive Exhibitor profile you have access to a shared inbox with your other team members.

Messages in the inbox are generated when an attendee visits your interactive profile and types a message into the “**Talk to...**” window. The chat is private between the attendee and your team.

For the attendee, **the message appears within the booth as a 1:1 chat.** For the exhibitor team, the message generates a notification in the platform, and appears as a message in the exhibitor inbox.



To view your interactive exhibitor inbox, click the **chat bubble** icon along the top menu. Switch between your personal inbox and the interactive exhibitor inbox by clicking on the dropdown box.

All team members will see a **red notification circle** over the **chat bubble icon** after each new message. Once any exhibitor team member reads the message, the red notification circle disappears for the entire team.

Click on the video icon to launch a **video call** using the integrated video calling feature. Click [here](#) for more information.

LEAD CAPTURE SET UP

The PLSA Events app can be used to scan delegate badges and business cards. As exhibitors you can capture and store the data for each contact and meeting that your team hold. You can also rate, make notes and add tags for follow up. All of this can be exported via the **Exhibitor Center** for follow up or to upload into your own CRM system.

To track your team's networking activity, make sure that everyone from your organisation is added as a **team member** to your company profile and that they have toggled on **'Share contacts with the team'**.

Everyone representing your company at the conference should download the **PLSA Events app** ([iOS/Android](#))



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

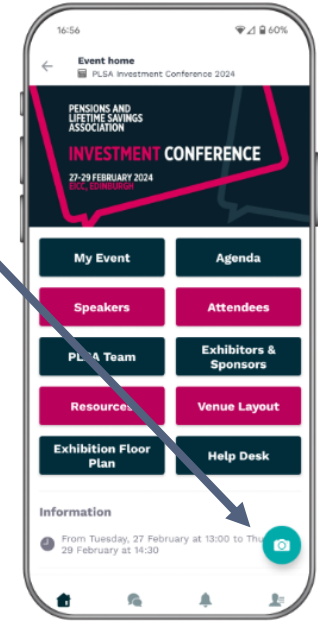
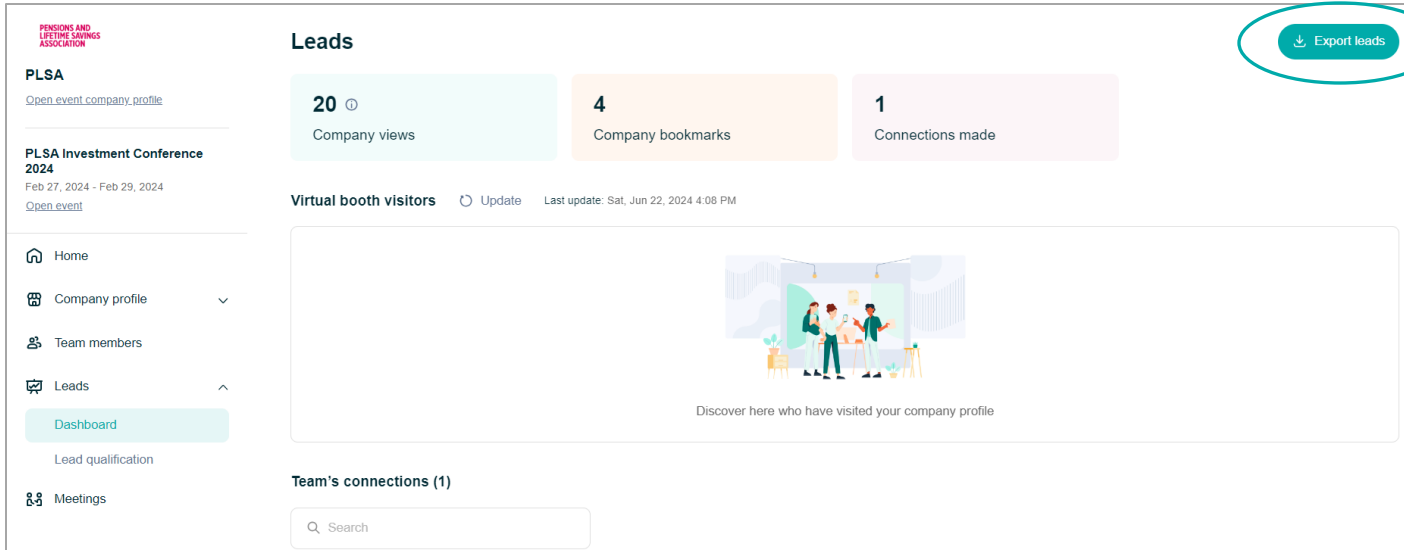
The screenshot displays the 'swapcard Exhibitor Center' interface for the Pensions and Lifetime Savings Association. The main content area is titled 'Team members' and features a search bar and three team member cards: Mahmoud Zein (Marketing & Social Media... PLSA), Marie Lake (Senior Marketing Manager PLSA), and Rebeccah Onabajo (Marketing & Social Media... PLSA). Each card includes a 'View profile' button and a privacy icon. On the right, a sidebar shows the profile of Rebecca Moessl (Events Technical Manager PLSA) with an 'Edit profile' button. Below this, there are two toggle switches: 'My visibility' (Be visible to other participants) and 'My connections' (Share contacts with the team), both of which are currently turned on. The 'My connections' toggle is circled in red. At the bottom, there is a section for 'Invite team members'.

EXPORTING LEADS

Scan delegate badges and business cards via the **camera icon** on the app home screen.

By going to the **Leads dashboard** in the Exhibitor Center you can view and export all the contacts collected by you and your team before, during, and after the event.

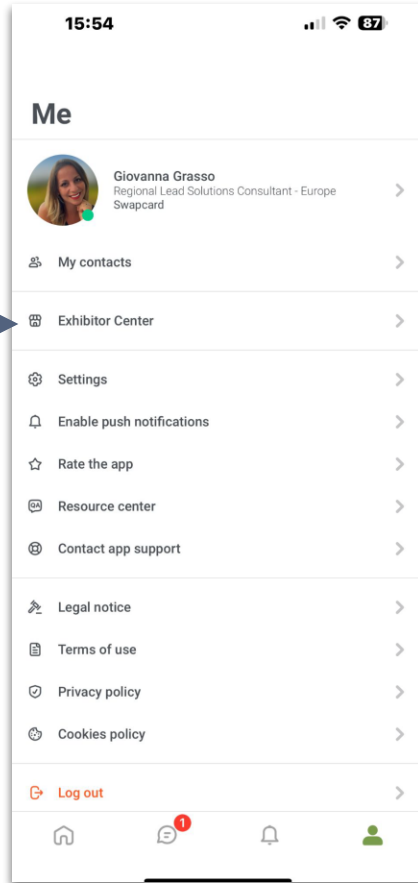
Note: Check that all of your team members have toggled on **'Share contacts with the team'**, in order that their scans will be available in the Leads dashboard.



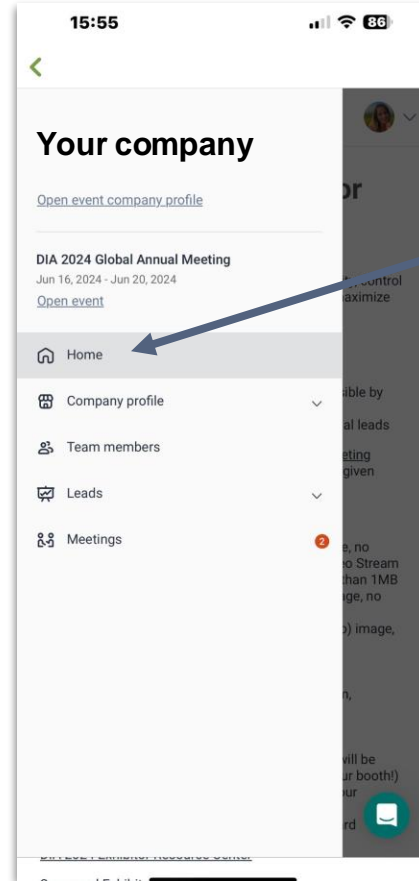
You can also export any contacts made yourself, as an excel file, by going to your contacts in your profile and clicking on "export".

EXHIBITOR CENTER IN THE PLSA EVENTS APP

Go to your **profile**
to access the
Exhibitor Center




Exhibitor Center



Exhibitor Center Menu

All the same Exhibitor
Center features on
desktop are also
available in the app


There are resources available for Exhibitors on Swapcard's website here: <https://help-attendees.swapcard.com/en/>



Attendees

If you are participating in an event powered by Swapcard as an Attendee

44 articles



Exhibitors

If you are participating in an event powered by Swapcard as an Exhibitor

22 articles

You can also contact the PLSA Events Team if you need further assistance events@plsa.co.uk

**PENSIONS AND
LIFETIME SAVINGS
ASSOCIATION**

PLSA CONFERENCES

**EXHIBITOR
GUIDE**

swapcard