Sponsor & Exhibitor Instructions

This guide provides step-by-step instructions for sponsors and exhibitors to access the event platform, set up their representatives, use the event app, manage their company profile, and collect leads.

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1. Set Up Your Team Accounts

Each representative should have **their own individual account**.

Step 1 — Provide representative details

Send the event organiser the following information for each representative:

- Full name
- Individual email address
- Job title/role
- Profile photo, if required

Each representative should use a **unique email address**.

Step 2 — Wait for the invitation

The event organiser will add the representatives to your company/exhibitor profile and send them an invitation via email.

Step 3 — Create or access the account

Each representative should:

1. Open the invitation email.
2. Follow the link provided.
3. Log into your representative account:

   - Option 1: You can create an account using the **same email address that received the invitation**.
   - Option 2: You already have an account as part of the event organizer’s custom login system, if so you can sign in with the corresponding email address and password.
   - Option 3: If they already have an account with that email address, simply sign in.
4. Open the event.

Do not share one login between representatives.

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2. Install and Use the Event App

Each representative can use the event app on their **own device**.

Step 1

Download/install the event app.

Step 2

Sign in using the representative's individual account.

Step 3

Open the relevant event.*

Step 4

Check that your company/exhibitor profile is available.

*if you have any questions or app concerns, please email the event organizer.

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3. Access the Exhibitor Dashboard through the Web app.

Representatives with the appropriate permissions can access the exhibitor dashboard of the organization/company they are representing.

From the event web app:

1. Open the profile menu.
2. Select **Exhibitor booths**.
3. Select your company.
4. Open the relevant section of the exhibitor dashboard.

Depending on the permissions assigned by the organiser, representatives may be able to edit the company profile and/or view leads.

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4. Add or Update Your Company Profile

If you have been given **Add and edit information** permission, you can manage your company profile.

You can update information such as:

- Company name
- Logo

- Company description
- Website
- Contact information
- Social media links
- Resources/PDFs
- Video links
- Other company information

To update your profile:

1. Open the exhibitor dashboard.
2. Select your company under **My exhibitor profiles**.
3. Open the **Info** tab.
4. Make your changes.
5. Click **Save**.
6. When everything is ready, click **Submit for review**.

Important: Changes submitted by exhibitors may need to be reviewed and approved by the event organiser before they become visible in the app.

Conference Compass – Update company profiles

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5. Set Up Lead Tracking

Representatives with **View leads** permission can collect and manage leads through the event app.

To scan an attendee:

1. Open the event app.
2. Open your profile menu.
3. Select **My contacts**.
4. Select **Scan a card**.
5. Scan the attendee's QR code/business card.

6. The attendee will be added to your contacts.
7. You are now able to:
    a. Request to connection request with the attendee in the app
    b. Chat with the attendee via the chat function (I think?)
    c. Add a note if you want to record follow-up information.

For example, notes can include:

- Requested product information
- Follow up after the event
- Interested in a meeting
- Send presentation
- Contact after the event

Viewing company leads

The exhibitor dashboard's **Leads** section allows the company to view leads associated with its representatives.

The dashboard can show which representative collected each lead.

Exporting leads

Representatives with the appropriate permissions can export leads from the exhibitor dashboard.

Lead information is subject to attendee privacy and consent settings.

Conference Compass – Lead tracking
