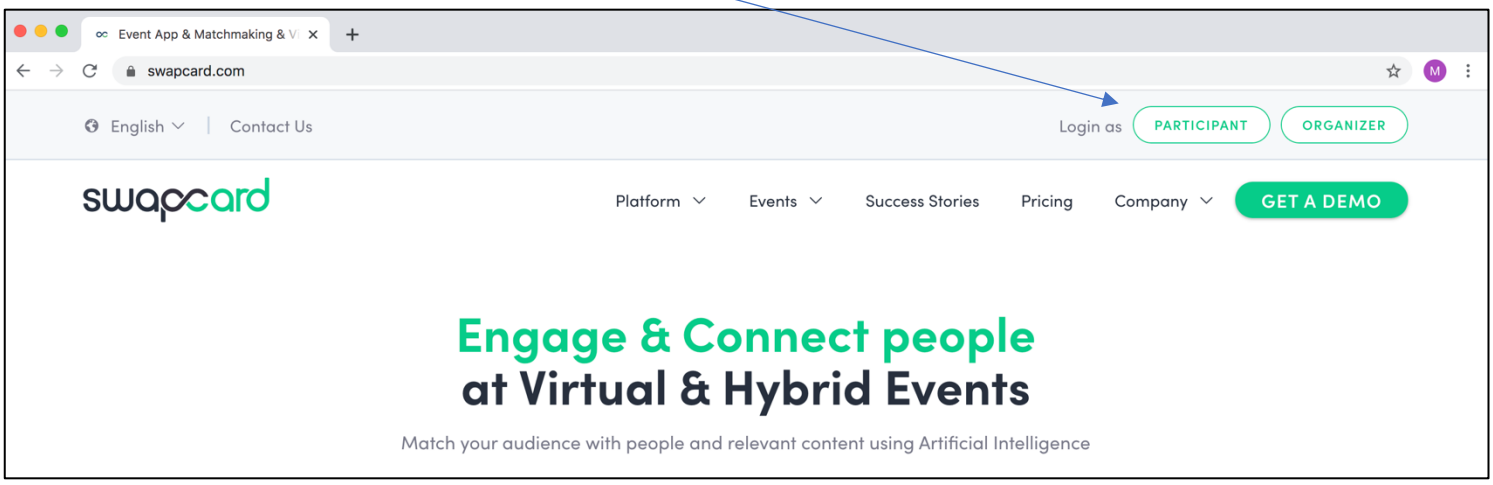
Movers & Shakers Community Platform FAQs

The Platform

How do I access the platform?

- You will have received an email when you are added to the platform sent from Movers & Shakers (from the address hello@swapcard.com) – please use the link in this email to access the Community
    - If you receive the following message after clicking the link "Magic Link Expired": The magic link email has a security token personalized for your email address which expires within an hour or once you click on the link. If you think your magic link may have expired, please request a new one at the login page



- If you have already set up your password, you can access your account using the email address given when registering for the event

Where do I go for help with the platform?

- If the answer to the question you have isn't contained in this document you can use our Helpdesk button which is located on the homepage of the platform, where you can ask any questions you might have
- The helpdesk will be manned periodically but if you need an answer right away please email chelise.flower@moversandshakers.uk.com or Julia.horsley@moversandshakers.uk.com and we will get straight back to you

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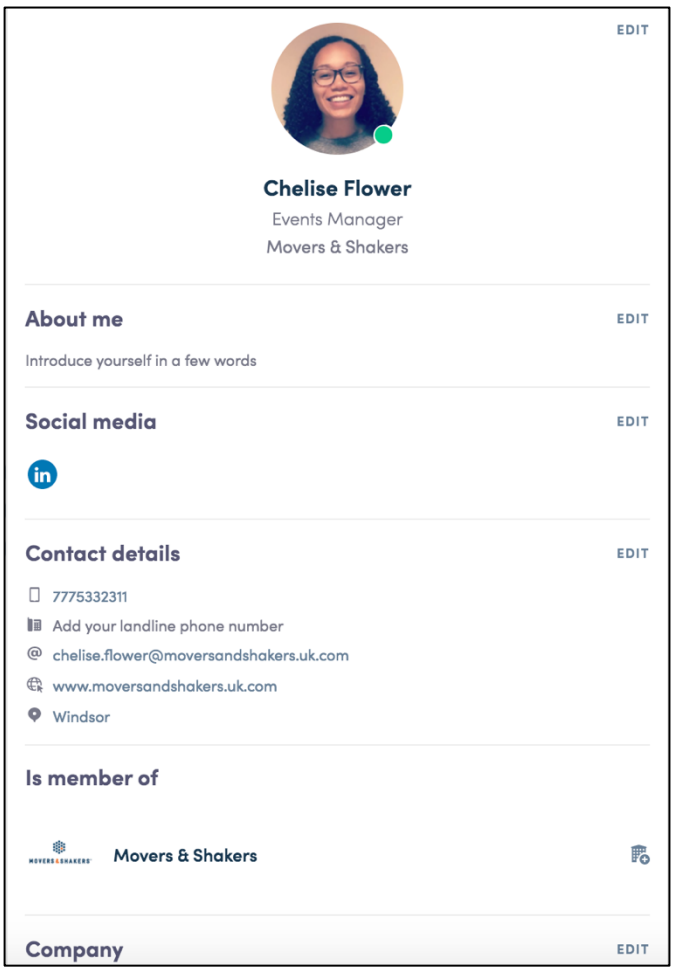
Your Profile and the Community

How do I update my profile?



Adding a photo

- The first time you log in you will be asked to add a profile picture
- Click on **Add your picture**, select the photo you want to have as a profile picture and then crop it with the tool that appears on the page. Once the photo has been cropped, you can validate it by clicking on ✓ at the top right of your screen.
- You can also add a photo later by going to the My Profile tab.
- Here, click on the box with your name and then on Edit in the box with your empty profile picture.
- Click on the empty circle of your profile photo, you will be able to select a photo and then crop it as explained above.
- You can also take a photo when editing your photo by clicking on "Camera"

Adding a biography

- To add a biography, go to the My Profile tab and then click Edit in the biography box. Describe yourself in a few words then go back to save.

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Adding social media

- Go to the My Profile tab.
- Click on the box with your name on and then click on Edit in the Social Media box.
- Add the usernames of the social media you want to add to your profile.
- Please note - it is important to add only the username and not the entire URL corresponding to the profile of each of your social media.

Once you have completed your profile the below information is public to everyone.

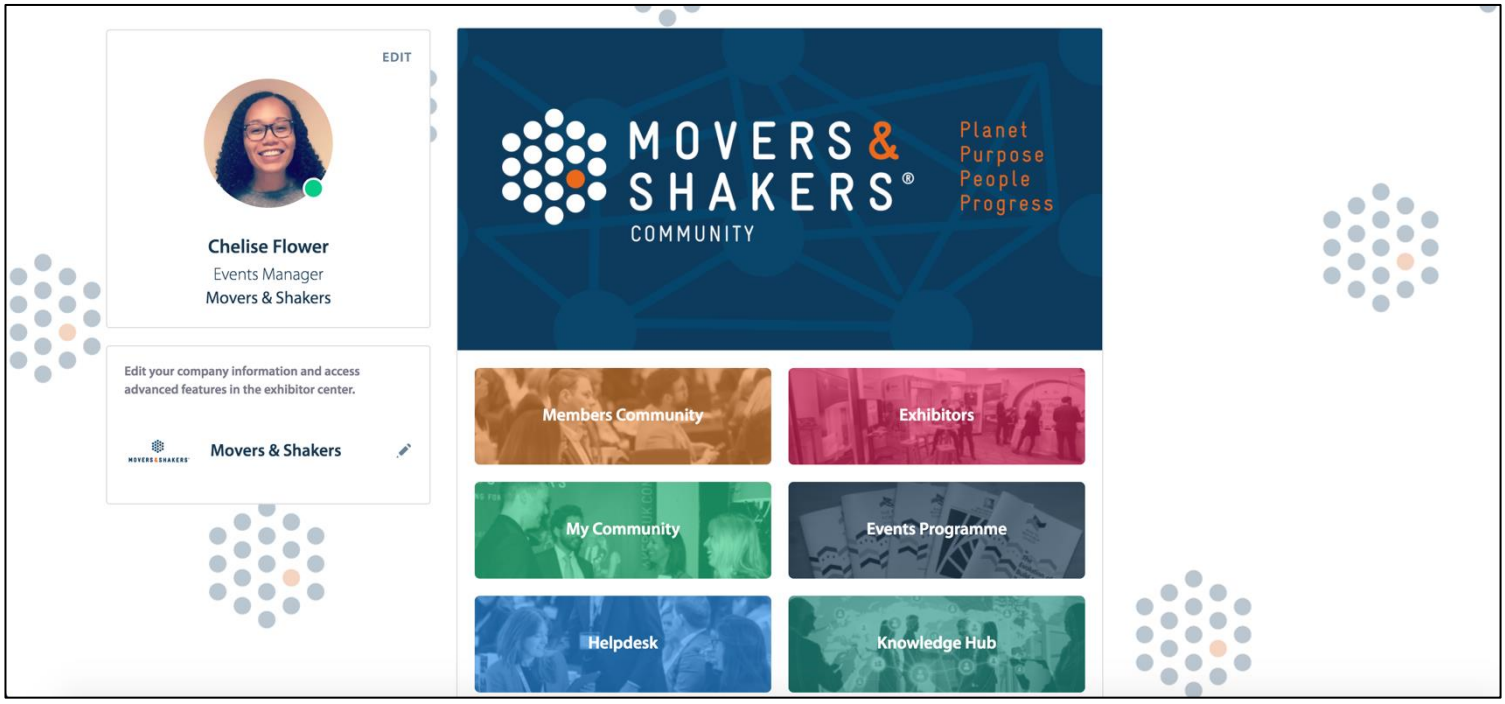
- Name
- Job title
- Company
- Biography
- Social Networks (if completed)
- Skills (if completed)

Additional information in your profile which becomes accessible by the participants with whom you are connected (connection or meeting request sent and accepted or received and accepted)

- E-mail
- Telephone (if completed)
- Address (if completed)

How do I navigate the Community?

- The Community is the main hub for Movers & Shakers Members, where you can network with other members, attend or catch up on events, visit exhibitors or catch review information in our knowledge hub.



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- When you first login to the platform you will find yourself on the Community homepage, from here you can use the buttons to find your way around.

- **Community Members button**:
  - Here you will find a list of all of the other members of the community and will be able to connect and send meeting requests. This will be made easier by the use of AI, helping to match you with other members that it would be beneficial to connect with.
- **Exhibitors button**:
  - All exhibitors are listed here, and you will be able to visit their hubs, where you can find out more information on the organisation, book meetings with their team members and make new connections, review any documents they have uploaded and view their social media and external websites.
- **My Community button**:
  - The 'My Community' button can be used to manage your meetings, easily find bookmarked sessions and exhibitors as well as anyone you have connected with.
  - More information on the My Community function can be found below (click here)
- **Events Programme button**:
  - This is where you will find all of the upcoming and past events.
  - They will be listed in date order and will include information on the session itself and the speakers.
  - You will be able to bookmark the session so that it adds it into your schedule and can be downloaded into your diary (more information can be found here)
- **Helpdesk button**:
  - This area can used if you have any questions about the platform. More information on the helpdesk is included here.
- **Knowledge Hub button**:
  - Here you will find specialist industry data and information on all of the topics that are important to our members.
- **Speech bubbles icon**:
  - At the top of the page, you can click on this icon to quickly navigate to conversations you have had with other members.
- **Alarm bell icons**:
  - At the top of the page, you can click on this icon to quickly navigate to any notifications that you have. These will include meetings, upcoming sessions, connection requests.

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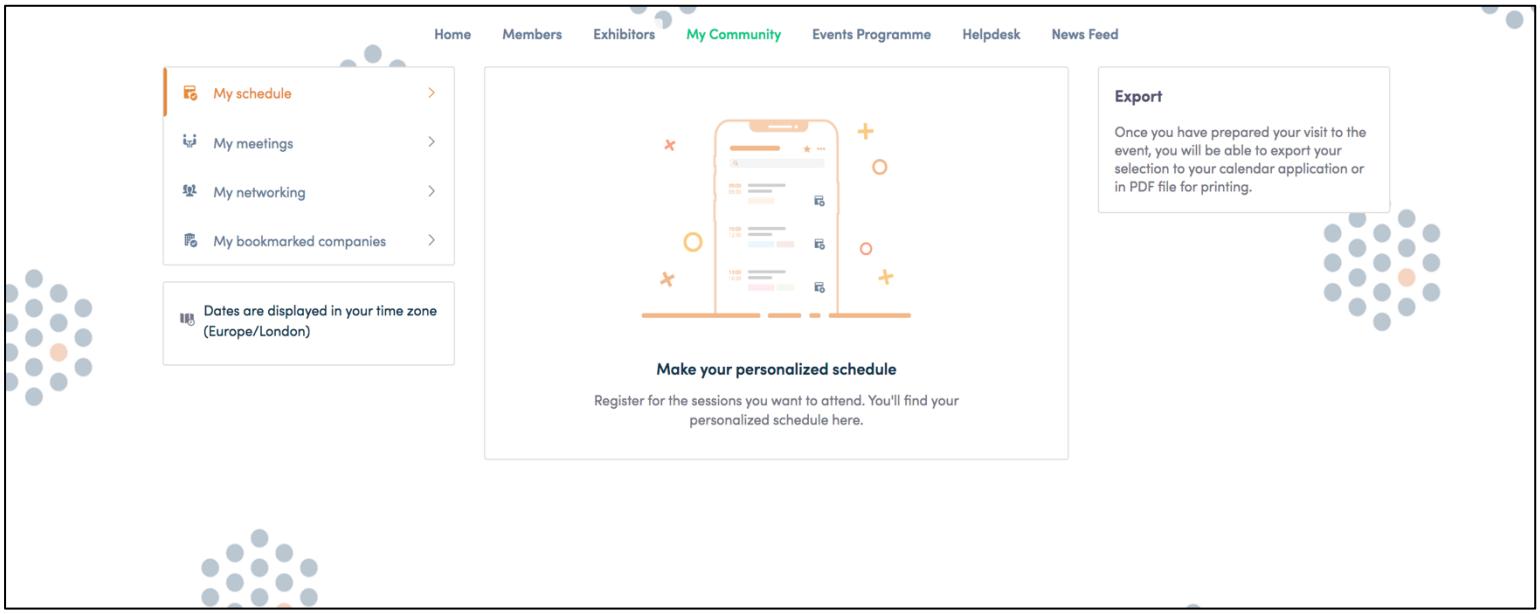
What is 'My Community'?

The 'My Community' button can be used to manage your meetings, easily find bookmarked sessions and exhibitors as well as the people you have connected with.



- My Schedule
  - The first tab of My Visit allows you to see the sessions you have bookmarked as well as your confirmed meetings. You can export your program and/or your meetings by clicking on Export at the top-right corner.
- My Meetings
  - Here you can see and manage your meetings.
- My Networking
  - Different from the application's Contacts menu, the My Contacts tab in My Community allows you to see all your contacts (confirmed or pending) made during the Community you are on (unlike the application's Contacts menu which lists all your contacts through all events).
- My Bookmarked Companies
  - All company files that you bookmarked by clicking on  are gathered here.

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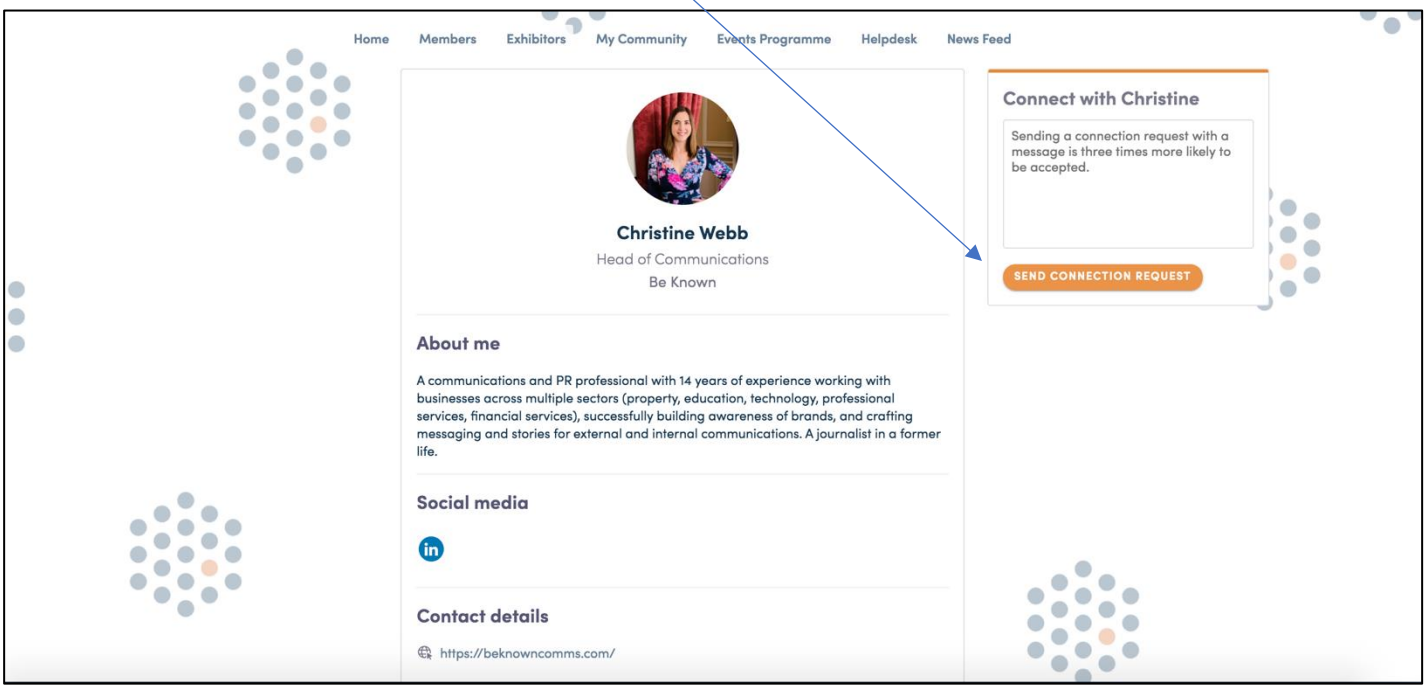
How do I send a connection request?



- To send a connection request to a person, go to their profile (via the list of participants or via an exhibitor hub) and click on Connect.
- We encourage you to write a message before sending your connection request to introduce yourself and explain the reason for the connection.
- Then click on the arrow in the top right corner to send your connection request.
- You will be able to find all the people you have been in contact with during an event in the My Community button under the My Contacts tab on the left-hand side.
- If you see this icon next to a contact, it means that the person has already accepted your connection request.
- If you see this icon next to a contact, it means that your connection request is pending.

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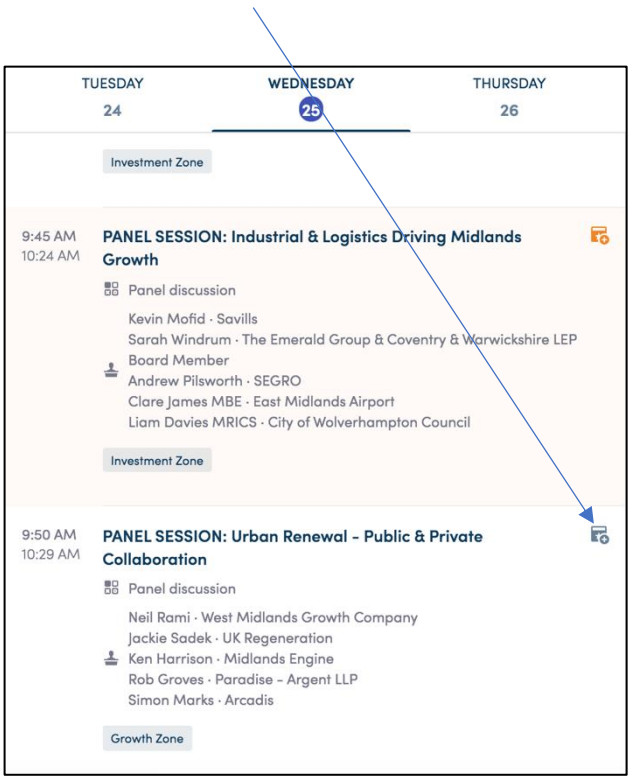
How do I bookmark and attend events?



- From the homepage you can navigate to the Events by clicking on the Events Programme button. Here you will see a list of the upcoming sessions, including timings, information on the topic, the speakers and the other attendees that have bookmarked to attend the session.
- On the session you would like to bookmark you can click on the calendar icon on the right-hand side on the full listings to add this event.
- Once bookmarked the event will appear in your schedule listed under 'My Community' where you can also export all of your listings to your calendar.
- On the day you can navigate to the live session via your schedule or on the events programme.

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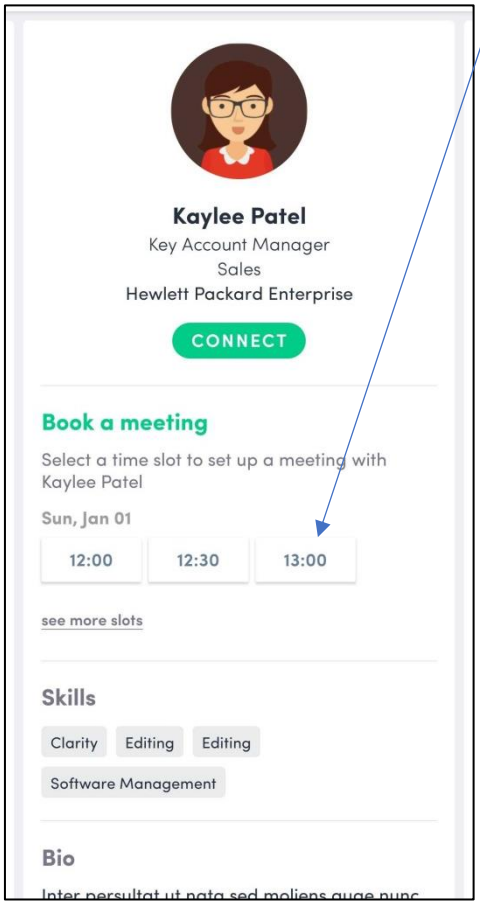
Meetings

Will I be notified about my meetings?

- Automatic notifications are sent when you receive a meeting request, and a reminder will also be sent a few minutes before the meeting starts.
- Similarly, when you cancel a meeting, your contact will be notified.
- Emails are sent through to the email address that you registered with, on the App if you have allowed notifications and on the platform under the bell icon in the top menu bar.

How do I book meetings with other members?



- Use the Members button to navigate to the full list of members and search for the person that you would like to request the meeting with and click on their profile.
- Click on one of the proposed meeting slots on the profile. If you want to see other slots, click on see more slots.
- After selecting a slot, choose a meeting place (for virtual events, this will always be virtual room) and write a message to the person you want to meet. Once done, click on the arrow at the top right to send your meeting request.

How do I book meetings with exhibitors?

- You can book a meeting with the exhibiting company directly.
- To do this, click on the exhibitor's button and navigate to the page of the exhibiting company you would like to book the meeting with
- Click on one of the proposed meeting slots. If you want to see other slots, click on **see more slots.**

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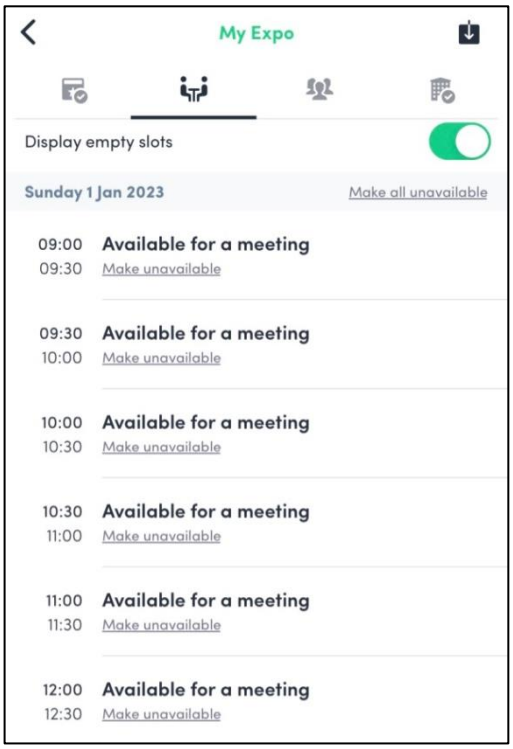
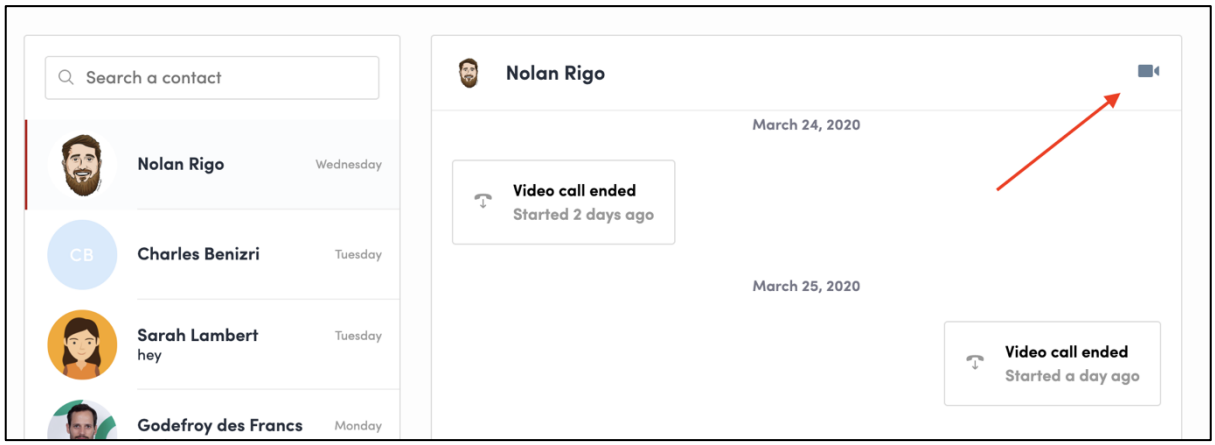
- After selecting meeting a slot, choose a meeting place (for virtual events, this will always be virtual room) and write a message if you wish. Once done, click on the arrow at the top right to send your meeting request.

How do I update my availability for meetings?



- You can see your pending or confirmed meetings by clicking on the 'My Community' button and then by clicking on the Meetings tab on the left-hand-side.
- You can cancel a confirmed or pending meeting by clicking Cancel Request (if it was pending) or Cancel Meeting (if it was confirmed).
- If you wish to make yourself unavailable on certain meeting slots created by the organizer of your event, you simply have to click on Make unavailable in the Meetings tab.
- The unavailable slots will no longer be displayed on your profile and other participants will no longer be able to book meeting with you on these slots.

How do I start the meetings/video calls?



- Once the meeting has been requested and accepted you can navigate to the meeting notification and click on the camera button at the agreed time and click on the video icon to start the meeting.
- Once connected you can view your connections full profile. From their profile you can then chat directly with them by clicking on the chat box on the right-hand side. You will be able to send images and documents and start an impromptu video call by clicking on the video button.

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How do I book group meetings?

- If you would like to book a meeting with more than one other participant you will need to contact either chelise.flower@moversandshakers.uk.com or Julia.horsley@moversandshakers.uk.com and we will be able to facilitate this for you.

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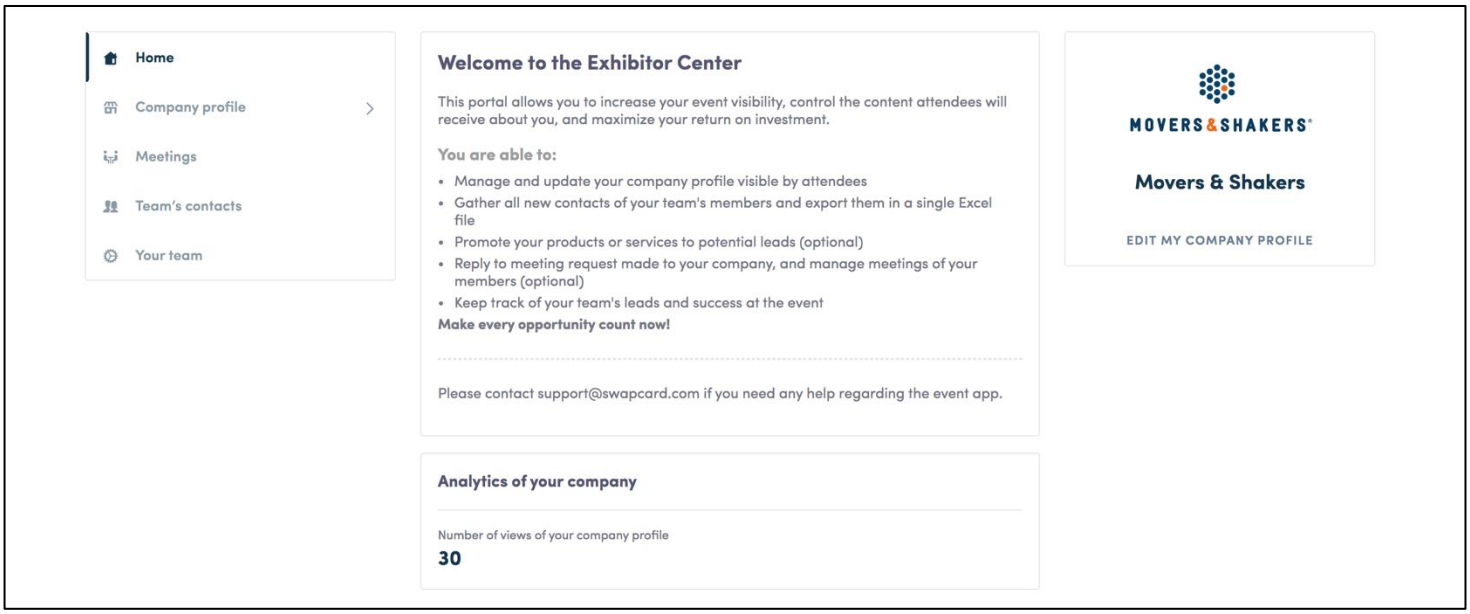
Exhibitors

Where do I find the exhibitor centre and update our hub?



- This is the **menu sidebar** 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.
- If this doesn't appear automatically it can be found by clicking on the dropdown arrow next to your name on the right-hand side of any page. From here there should be an 'Exhibitor Centre button', once you have clicked on this you will be taken into the area where you will be able to edit the exhibitor booth and will see a menu appear as above.
    - Please note if this option doesn't appear it means that you are not connected to a booth and will need to get in touch with one of the Movers & Shakers team for this to be updated.
- **Home**: find the welcome message of the event organizer as well as some statistics about your exhibitor hub.
- **Company profile**: view and modify the information of the company for which you are exhibiting. Click edit and you will be able to update all of the below:
    - Add or update your company logo
    - Update the background image used on the booth
    - Add a link to a video on YouTube or Vimeo or use a banner
    - Add links to social media
    - Add a link to your website
    - Add links to any relevant documents
- **Meetings**: manage meeting requests that are sent to your company.
    - A red dot indicates that you have a pending notification
- **Contacts**: view and export all the contacts made by your team before, during and after the event.

- **Your team**: manage the different members of your team.

How do I control meetings as an exhibitor?

- Participants in an event can request meetings with exhibitors.
- When you receive a meeting request, you have the option to accept or decline it.
- All requests received appear in your Exhibitor Area, in the "Meetings" tab.
- You can also assign specific members of the exhibiting organisation when confirming a meeting.