

# Exhibitor Guide for the Event App



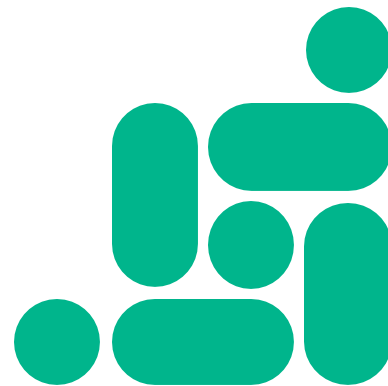


Welcome to the Exhibitor Guide.  
You will be using the tools in your  
Exhibitor Center to manage your  
team, and interact with  
attendees during the **event!**



# Table of contents

1. Access the app
2. Exhibitor Center
3. Content Features
4. Networking Features



# Access the App Login



# How to login for the first time?

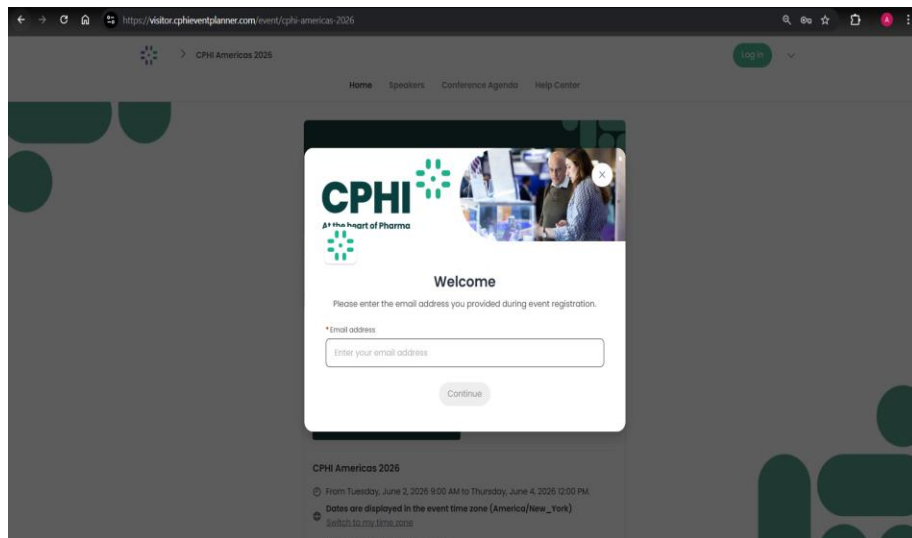
## Login for the first time:

Step 1: You will receive an email\* from [servicesnoreply@eventsbycphi.com](mailto:servicesnoreply@eventsbycphi.com) containing a link to the Event Planner. Click the link

Step 2: A window will then prompt you to create a password for your account

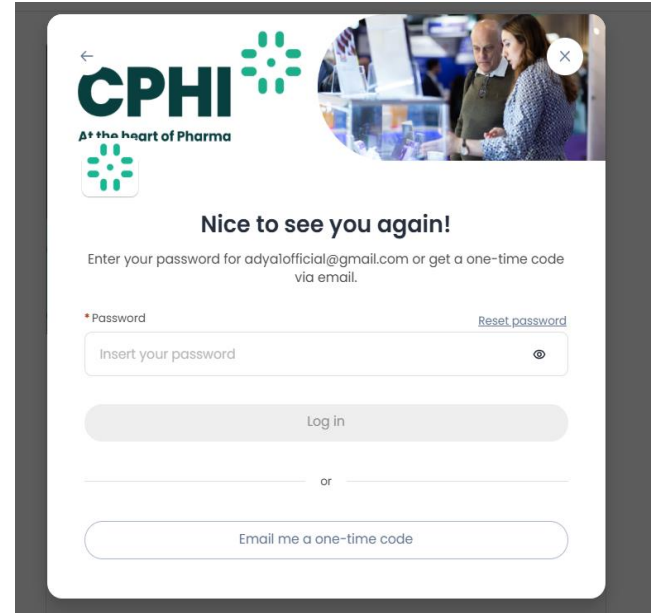
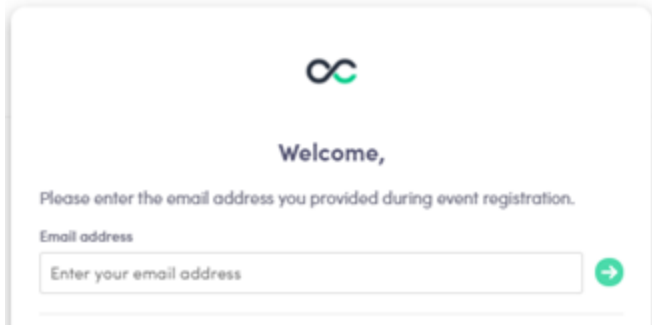
Note: If you don't see this email in your mailbox, please check your spam folder. Most of our emails are sent from

[servicesnoreply@eventsbycphi.com](mailto:servicesnoreply@eventsbycphi.com)



# How to login when I have an account ?

- 1 Access your account on <https://visitor.cphieventplanner.com/event/cphi-americas-2026>
- 2 Enter the email you used to register from your event and your password. Click the green arrow to connect.

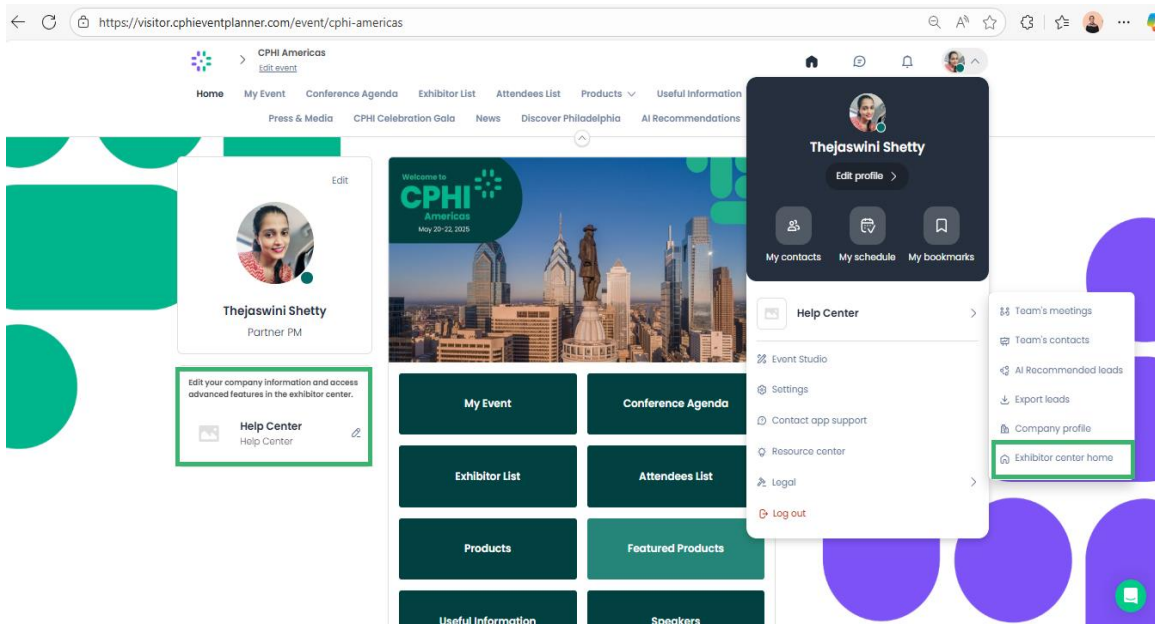


- Note:** If you have forgotten your password, click **“Send me a magic link”** after entering your email. You’ll receive an email to reset your password (valid for 1 hour).  
If you need any help, please contact [cphiexhibitor@informa.com](mailto:cphiexhibitor@informa.com)

# Exhibitor Center

## FUNCTIONALITIES





There are three ways to access your Exhibitor Center

1

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

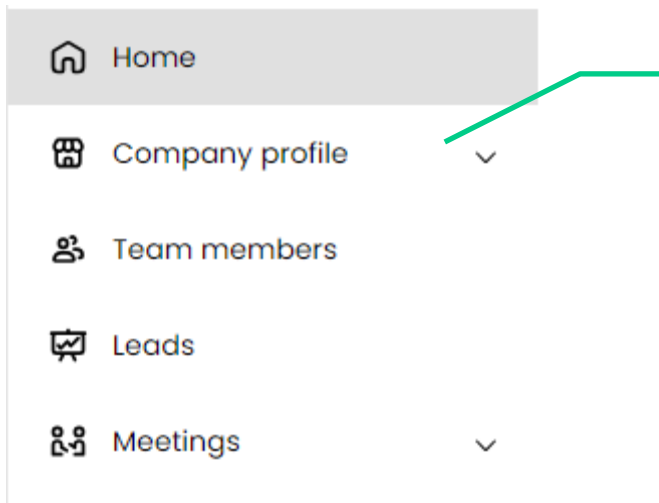
2

Click **“Exhibitor Center”** in the drop down menu.

3

Click on your Exhibitor booth from the home page.

**Note:** you can access the Exhibitor Center even if the event isn't live.



This **navigation bar** will appear on the left side of your screen. It will help you to navigate between the different sections of the **Exhibitor Center**.

**Home** is the first page that you will see when accessing the Exhibitor Center.

A red pin indicates that you have a **pending notification**. Click to see what's going on!

# Company profile – Overview

▶ Preview



### Help Center

[Open event company profile](#)

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**CPHI Americas 2026**  
Jun 2, 2026 – Jun 4, 2026  
[Open event](#)

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Home

Company profile

**Overview**

Documents & Links

Product

Team members

Leads

Meetings

## Help Center

[Customize](#)

---

### Information

[Edit](#)

Please add a description of your company

Organization Type  
Organization Type

Business Activity  
Business Activity


Company Certification  
Company Certification

Markets Active In  
Markets Active In

Country

### 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](#)

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### 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](#)

Make sure to update your personal and company profile on **CPHI Online** to maximize your visibility. An up-to-date profile ensures you appear in filtered searches and recommendations. Without current information, you risk being overlooked by valuable connections actively searching the platform.

# Manage your meetings

## Meetings

Export meetings

Manage availability

Status	Meeting date	Location	Team members	External participants	Request date
Pending	January 12, 2024 9:00 AM to 9:30 AM	Virtual Virtual Room	Ben Alex +1 more	-	January 10, 2024 5:38 AM
Pending	January 12, 2024 10:00 AM to 10:30 AM	Virtual Virtual Room	Ben Alex +1 more	-	January 10, 2024 6:51 AM

### Meeting requests

Ben wants to meet you. 7 minutes ago

1:1 meeting

Fri, Jan 12, 2024 10:00 AM to 10:30 AM

Virtual Room

You have 2 day(s) left to answer to this request

Ben Alex  
Informa

Accept Decline

- **Display the meetings** of your team (*All members* or a specific team member)
- **Filter meetings by status:** Pending, Confirmed, Canceled or Declined.
- **Assign a meeting:** reply to the meeting request and select a team member to assign.
- **Accept or decline meeting requests or cancel an existing meeting.**
- **Export the full list of meetings.**

# Add your company products

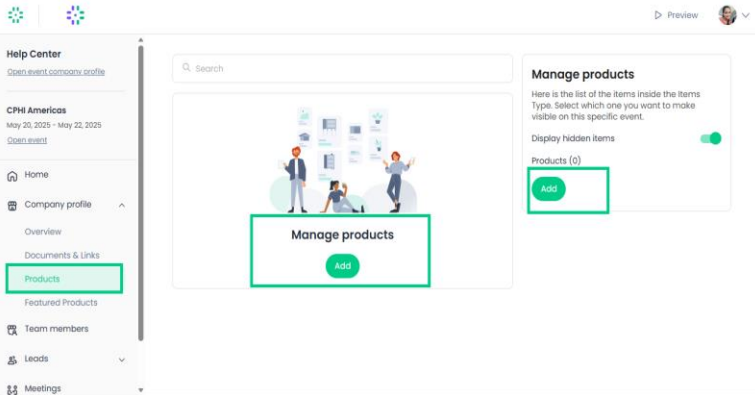
Promote your offerings and solutions to the entire show universe by adding products to your company profile. Give your products a name, unique description and image to help them reach your target audience.

**Step 1:** Select products from the navigation panel

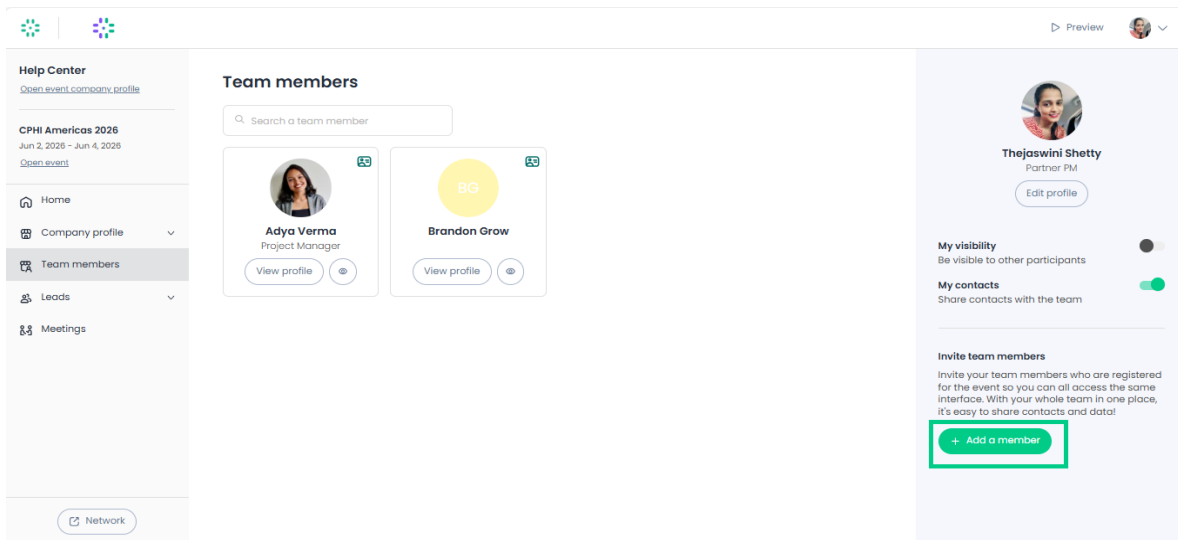
**Step 2:** To add a product click on “Add”, located on the right of the page

**Step 3:** To edit a product, hover over it in the list and select the pen icon to make changes

**Step 4:** Select the 3 dots at the side of each product to hide it from attendees



# How to add a teammate to your team?



In your **Exhibitor Center**, you can manage your team.

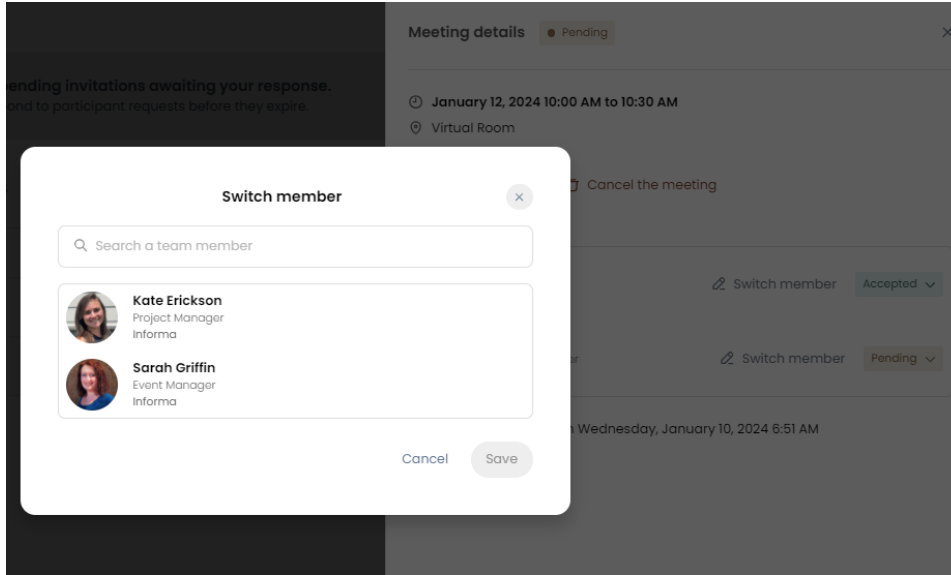
Go to the **“Team Members”** tab and see all your teammates on the booth.

To add new members, click **this button** and add their email address. If you can't see this button please contact the event organizer. The contacts of new members aren't shared by default for security.

**To add a member, he/she must already be in the list of participants.**

**\* Note:** only if allowed by the organizer

# How to assign a teammate to a meeting?



In your Exhibitor Center, you can manage your team member's meetings.

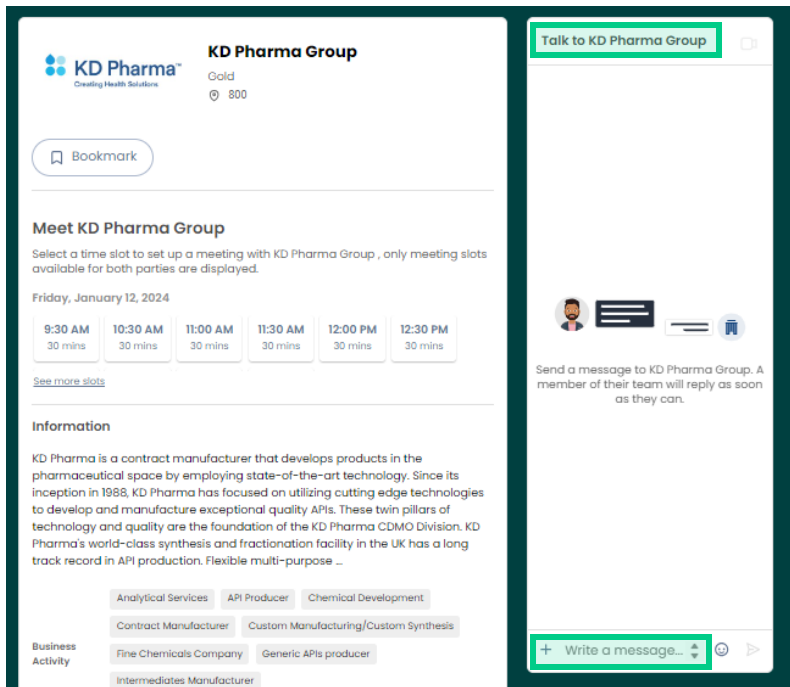
Go to the **"Meetings"** tab and see all your team meetings during the event.

To assign or change a team member for a meeting, **click on the meeting** and choose the team member you wish to assign.

A confirmed meeting has to be assigned to a member of the team for them to get reminders.

**Note\***: once the meeting has been initiated by a team member, you are unable to assign someone else.

# What happens if I receive a message as an exhibitor? (1/2)



Once you are added to an Exhibitor booth as a team member, you have access to a shared inbox with all your organization's team members.

Messages in the inbox are generated when an attendee visits your booth and types a message into the **"Talk to..."** window.

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.

# Team's contacts and exports

The screenshot shows the 'Team's contacts' tab selected in the sidebar. The main content area displays a table of contacts with the following data:

Photo	First name	Last name	Job title	Company	Email	Created on
	Alenar	Al-Mallak	Project Manager Team Lead Southern Europe	Swagcard	alenar@swagcard.com	04/21/2021 • 7:50 AM
	Ivan	Fernandez Lucas	PM, CEST / GMT+02:00 (Paris)	Swagcard	ivan@swagcard.com	10/20/2020 • 9:27 AM
	Nurma	Lopez	Event Support Specialist	Swagcard	nurma@swagcard.com	11/16/2021 • 9:15 AM
	Anais	Silvano	EPM	Swagcard	anais@swagcard.com	04/21/2021 • 7:50 AM
	Emeline	Thomas	Event Project Manager EU	Swagcard	emeline@swagcard.com	01/25/2021 • 2:42 PM

At the bottom of the table, there is a pagination control showing 'No / page 10', 'Page 1', and '1 - 5 of 5'.

1

2

3

1

By going to the **"Team's contacts"** tab, you can view and export all the contacts collected by you and your team before, during, and after the event.

2

**Only the contacts** (from connections, meetings, and people who can chat in the exhibitor booth) of your **collaborators who have enabled the contact sharing option will be displayed**, in addition to yours. You can check if **all your collaborators have activated it** from the **"Your team"** tab.

3

From the App or Web App, **you can also export your contacts (and only yours)** as an Excel file by going to your contacts and clicking on **"Export all."**



### Let's talk GDPR...

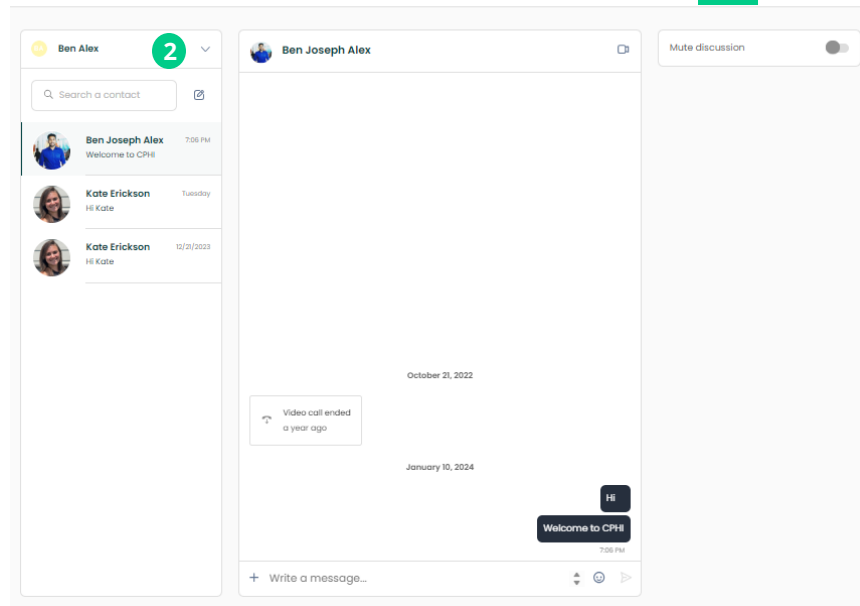
*All users of the platform have agreed to share their data with the event organizer. When you connect with a user, they tacitly agree to share their information with you. You therefore retrieve this information in accordance with GDPR.*

# What happens if I receive a message as an exhibitor? (2/2)



- 1 To view your exhibitor inbox, click the **chat bubble icon** along the top menu.
- 2 Switch between your personal inbox and the exhibitor inbox by clicking on the dropdown box.
- 3 All exhibitors will see a **red notification circle** over the **chat bubble icon** after each new message.

**i Note:** once any exhibitor team member reads the message, the red circle disappear for the entire team.



# How to share your contacts with your team?

The screenshot displays the CPHI event management interface. On the left is a navigation sidebar with options: Home, Company profile, Team members (selected), Leads, and Meetings. The main content area is titled "Team members" and includes a search bar. Below the search bar are three team member cards: Adya Verma (Project Manager), Brandon Grow, and Adya Verma. Each card has a "View profile" button and a pen icon. To the right is a detailed profile view for Thejaswini Shetty, Partner PM, featuring an "Edit profile" button, "My visibility" (Be visible to other participants) toggle (off), "My contacts" (Share contacts with the team) toggle (on), and an "Invite team members" section with an "Add a member" button.

Each team member can choose to share their contacts with the team.

Go to the "Your team" tab and see all your teammates on the booth.

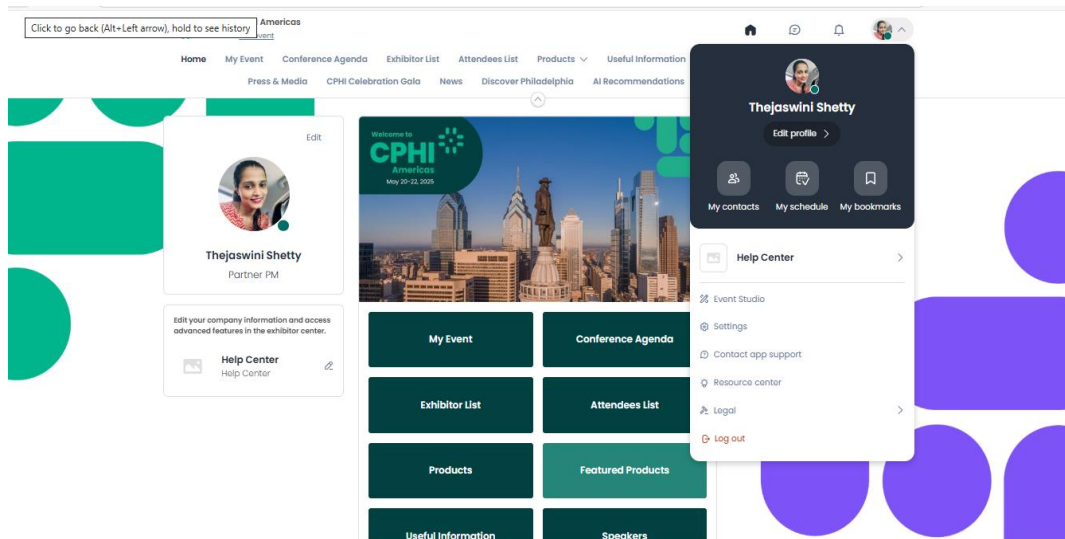
To share contacts, click the pen to the right of your name. You will then see a toggle list appear where you'll be able to choose whether to share your contacts with the team.

# Personal Profile

## Increase your visibility



# How to edit my personal profile? (1/2)



There are 2 ways for you to access your profile

1

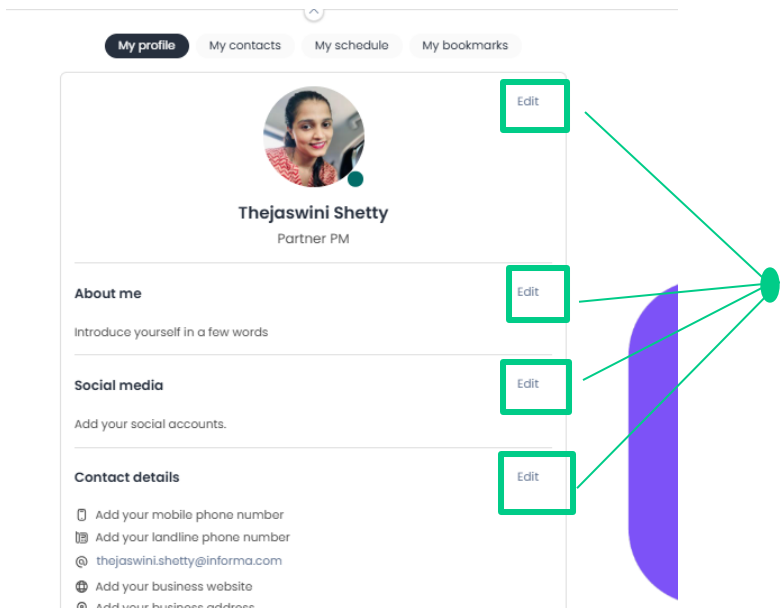
On the upper-right corner of your screen, click on **“My profile.”**

2

On the left side of your screen next to your photo, click on **“Edit.”**

You'll then be redirected to your profile details.

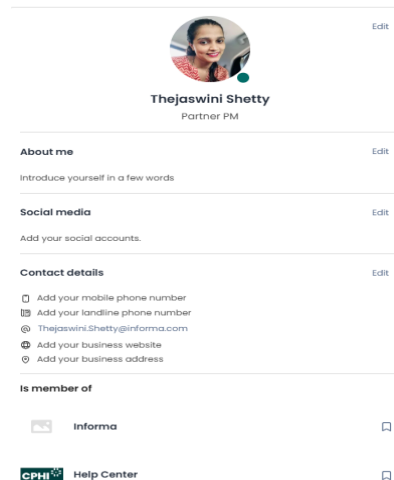
# How to edit my personal profile? (2/2)



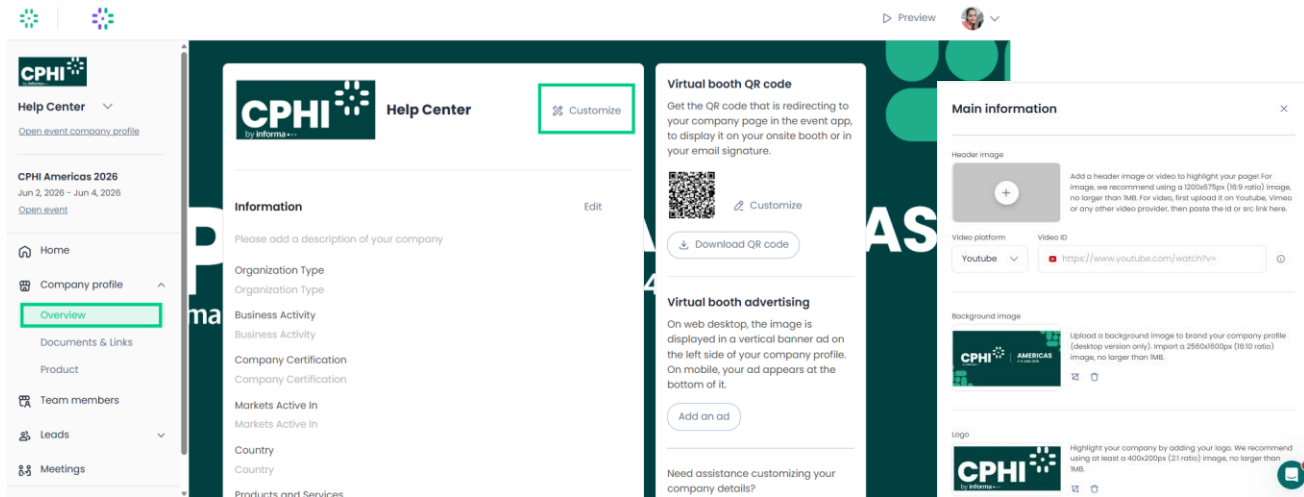
To edit the information on your profile, simply click on the **“Edit”** or **“Add”** parts depending on which type of information you want to edit.

Below is some of the information you can edit on your profile:

- My main information
- About me (Biography)
- Social Media
- Contact details
- Company



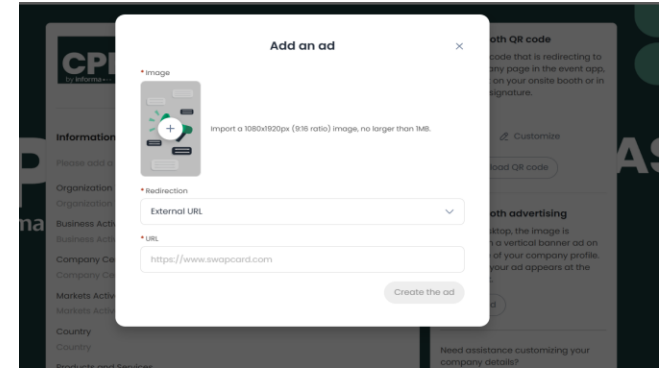
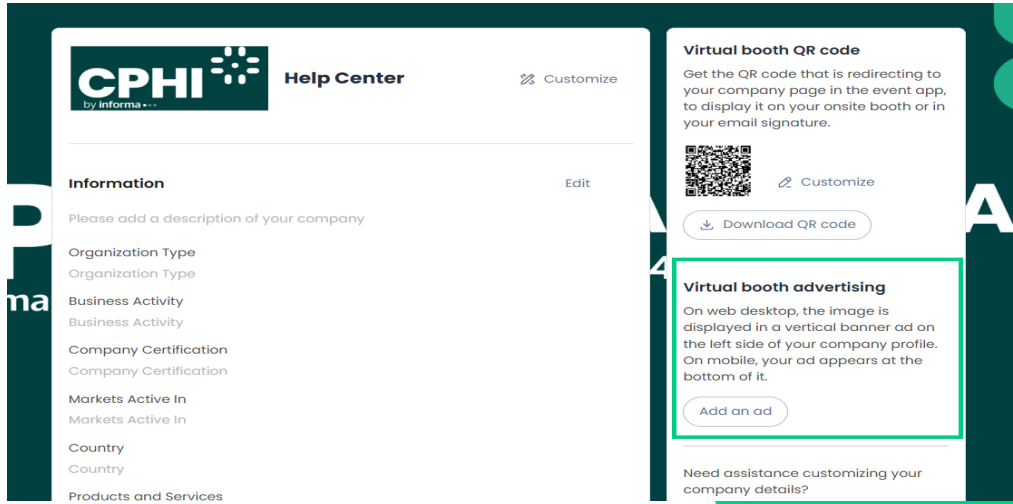
# Company profile - How to add a background?



As an exhibitor, depending on your sponsorship package, you can upload a background image onto your company homepage.

- 1 To upload a file, go to your Exhibitor Center and click on **"Company Profile."**
- 2 You will then be able to add your image.

# Company profile – How to include an ad?



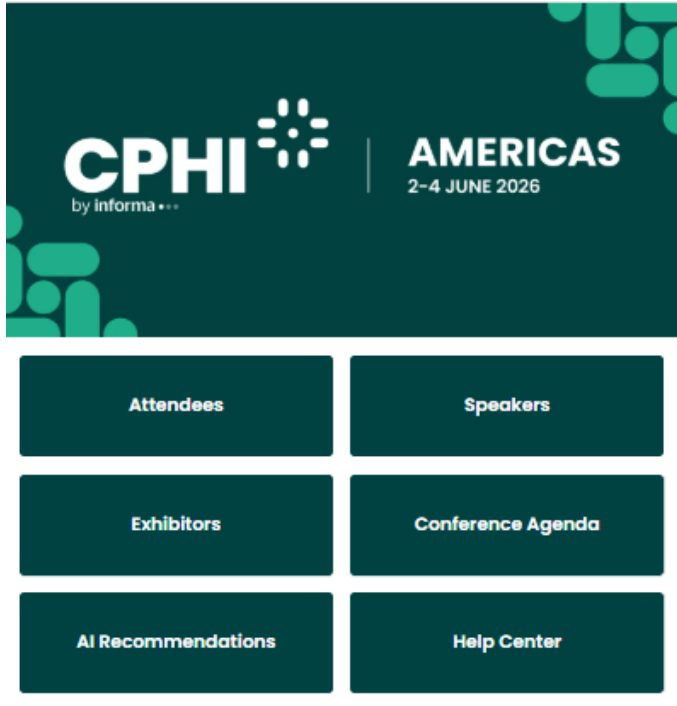
As an exhibitor, depending on your sponsorship package, you can also include an ad to your company homepage and choose your redirection for it.

- 1 To upload a file, go to your Exhibitor Center and click on "Company Profile."
- 2 You will then be able to add your file.

# Networking Features Main Functionality



## How to network?



1

On the homepage of the event, you can access the Attendee and Speakers list. This will help you find visitors to network with.

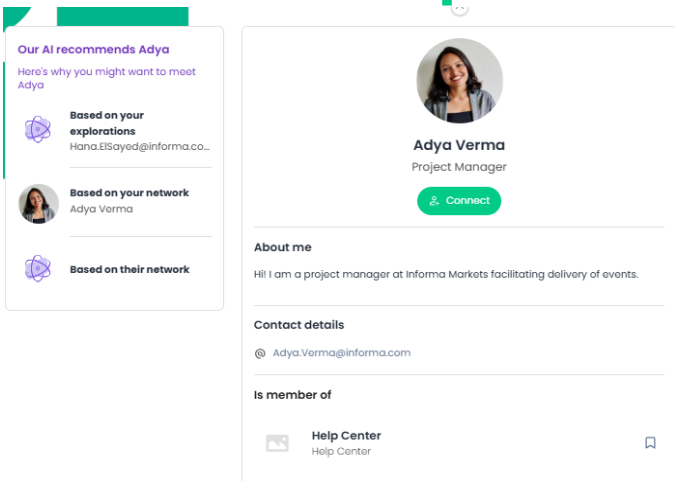
Don't hesitate to contact them through the application to chat, and book meetings.

2

If you see time slots appearing on attendees' profiles, it means that the organizer has allowed meetings to be scheduled during the event.

Request meetings with the attendees of your choice before all their slots are booked. You can also manage your availabilities from the **"My Profile"** section of the application.

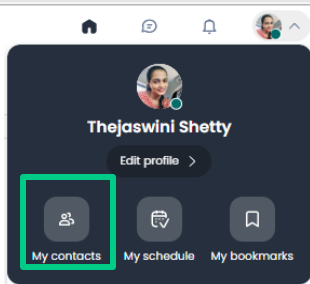
# How to make a connection request?



Go to someone's profile via the list of participants, speakers, or a company profile and click on

Send connection request

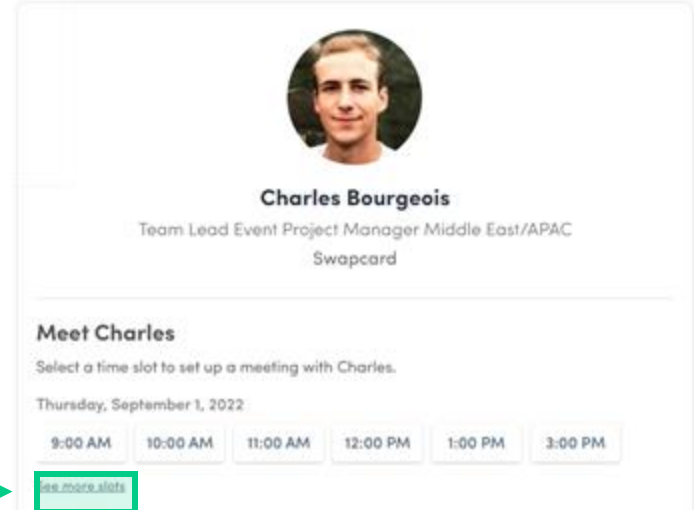
We encourage you to write a message before sending your connection request to introduce yourself and explain the reason for your request.



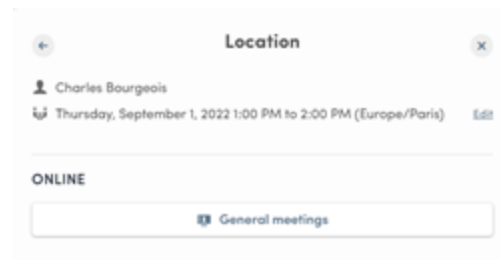
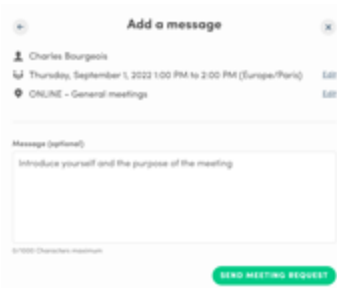
You will be able to find all the people you have been in contact with from "My contacts" tab under your profile picture, or in the **"My Profile"** button in **My Networking** tab.

# How to request a meeting?

- 1 Go to a person's profile - by going to the list of attendees, speakers, or a sponsor's profile.
- 2 Click on one of the suggested meeting slots. If you want to see other slots, click "**See more slots.**"
- 3 After selecting a slot and the **Meeting** location, write a message to the person you want to meet. Once done, click



Send meeting request



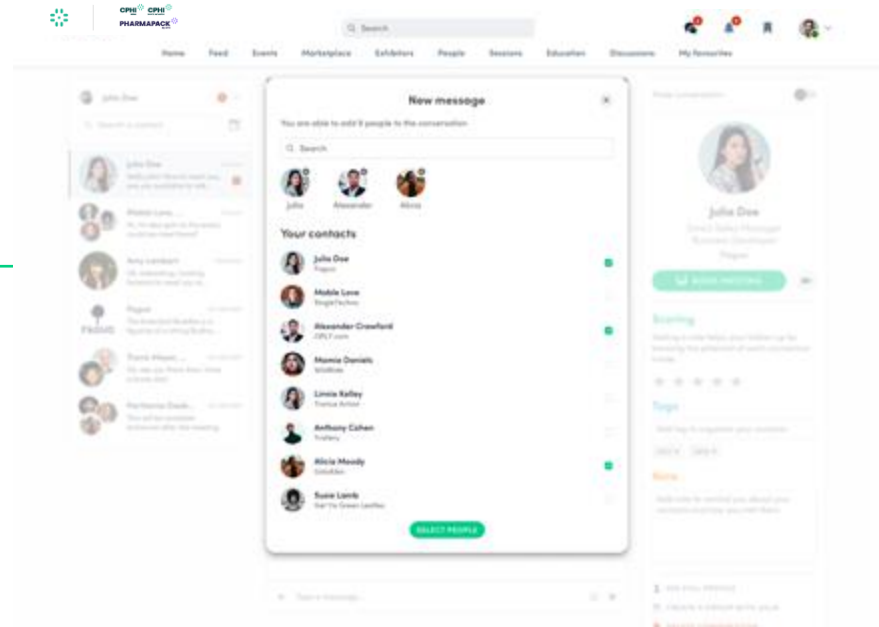
# How to create Group chats?

The Group Chat feature gives Users 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



# Lead Retrieval



# Set up your qualifying questions

**Bring consistency to your lead qualification by creating personalized questions for your company. After scanning an attendee badge or connecting with someone online, your team can answer these questions to help identify the quality of the lead.**

## To set up your personalized questions:

**Step 1:** Log in to the Event Planner and go to your ExhibitorCentre\*.

**Step 2:** Select "Leads" from the left hand menu. Then select "Leads qualification"

**Step 3:** Click the button titled "+ Create a qualification field"

**Step 4:** Create your questions. There is no limit on the number of questions you can add. Single choice, multiple choice and short text answers are supported

*\* It is possible for any member of your team to add questions, however once a question is added it will be seen by all your team members. We suggest one person take responsibility for adding questions and that they set these up as early as possible to get the most benefit*

CPHI Americas  
May 20, 2025 - May 22, 2025  
[Open event](#)

- Home
- Company profile
- Team members
- Leads
  - Team's contacts
  - AI Recommended leads
  - Lead qualification**
  - Export
  - Meetings

Network

Define all desired qualification fields in the form before its utilization; otherwise, responses could be lost or absent.

[+ Create a qualification field](#)

Score

★ ★ ★ ★ ★

Note

Enter any additional details to remember

Users can only answer questions from the app. You can't directly answer these questions. Team members can complete the qualification fields for each contact directly in the app. Once a qualification field is filled for a contact, it cannot be removed or edited from the form. All collected responses will be available in the leads export for easy access and follow-up.

**Step 5:** Click on the pen icon to edit the question



Multiple choices

- Option 1
- Option 2
- Option 3

Type

- Lead
- Partner
- Supplier
- Existing client

**Step 6:** Edit the field name and values. To save a value, select the tick icon.

### Company Size



\* Qualification field name

Company Size

12/1500 characters maximum

\* Values

1 - 50

51 - 500

501



+ Add value

 Delete qualification field

# Scan attendee badges onsite

CPHI by informa

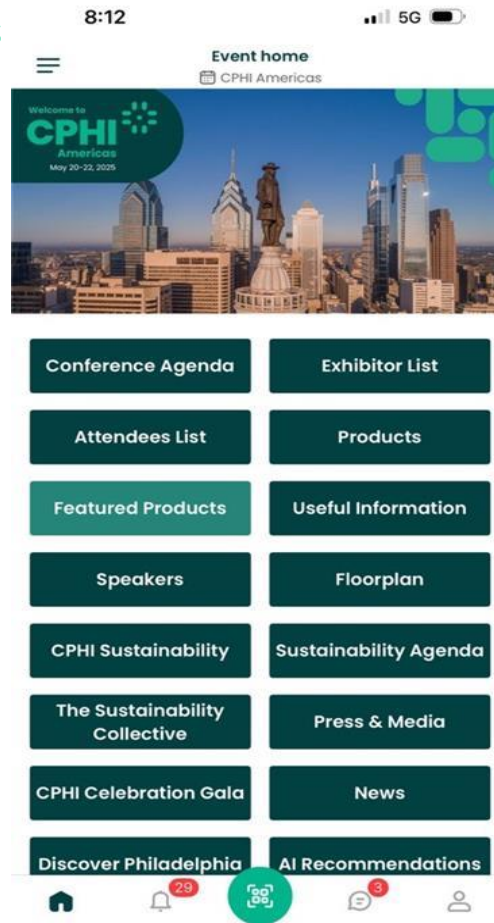
Scanning a badge will capture their contact details for you to download later.

To start scanning badges onsite, you will need to download the app.

**Step 1:** Log in and select the QR code icon at the bottom center

**Step 2:** Select QR Code

**Step 3:** Align the square camera with the attendee badge



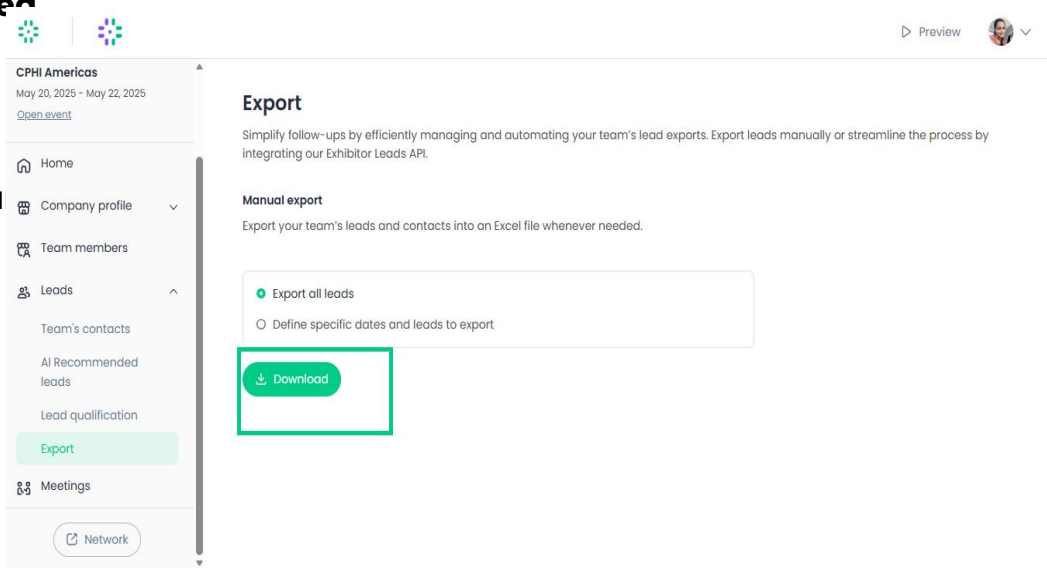
**Post-event, you can download an excel file that includes the information of all your scanned badges, any connections made online and anyone who has interacted with your sponsored content. The file is formatted so that all the information can seamlessly be imported into most CRM systems.**

**Step 1:** Log in to the Event Planner and go to your **Exhibitor Centre**. To get to the exhibitor centre from the event homepage, click your profile picture in the top right-hand corner and select “Exhibitor Centre” from the dropdown menu.

**Step 2:** Select “**Leads**” from the left-hand menu.

**Step 3:** Click “Export Leads” from the top right corner.

**Step 4:** You can download all your leads at once or select specific dates and sources



The screenshot displays the CPHI Americas Exhibitor Centre interface. On the left is a navigation menu with options: Home, Company profile, Team members, Leads (highlighted), Team's contacts, AI Recommended leads, Lead qualification, Export (highlighted), and Meetings. At the bottom of the menu is a 'Network' button. The main content area is titled 'Export' and includes a sub-section 'Manual export' with the instruction: 'Export your team's leads and contacts into an Excel file whenever needed.' Below this, there are two radio button options: 'Export all leads' (selected) and 'Define specific dates and leads to export'. A green 'Download' button with a download icon is highlighted with a red box.

**Thank you for taking the  
time to read this presentation.**

**Any questions, please email our  
client services team:  
[cphiexhibitor@informa.com](mailto:cphiexhibitor@informa.com)**

