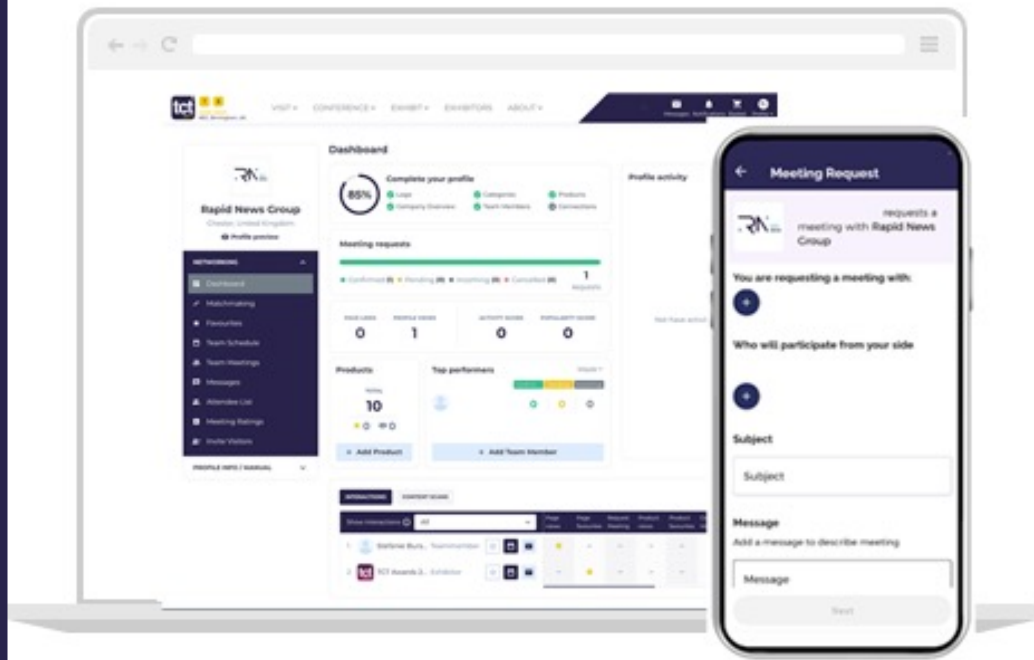
MAKING THE MOST OF LEAD RETRIEVAL

KEY FEATURES

Our dashboard showing who is interacting with your company profile, products and team members

- **Scan badges, categorize leads, rate leads and make notes, including offline scanning of badges**
- **Ability to download leads**
- **Ability to equip your stand personnel with lead retrieval**
- **Ability for visitors to request onsite meetings and send messages**
- **Ability for visitors to scan badges and scan company and product QR codes**
- **Ability for visitors to favourite companies and products**



PRE-EVENT NETWORKING TO GENERATE MORE LEADS

COMPANY DASHBOARD

When logged in with an exhibitor profile or as an admin team member accessing the company profile, this version of the Dashboard page is displayed.

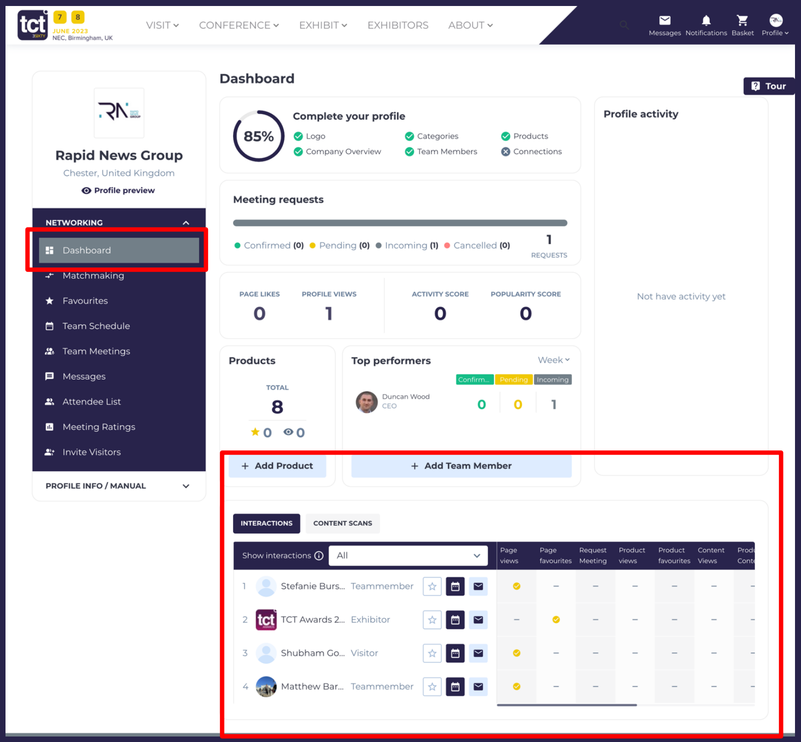
At the bottom of the Dashboard page you will see a list of who has interacted with your profile and who your team has scanned onsite.

Interactions displayed are:

- Company profile page viewed
- Page favourite
- Meeting requested
- Product viewed
- Product favourite
- Scanned at stand

On this page you can:

- Click into a person's profile to see additional details about them
- View all leads from both the website and mobile
- Add a person to your favourite's
- Send a message
- Send a meeting request



ATTENDEE LIST

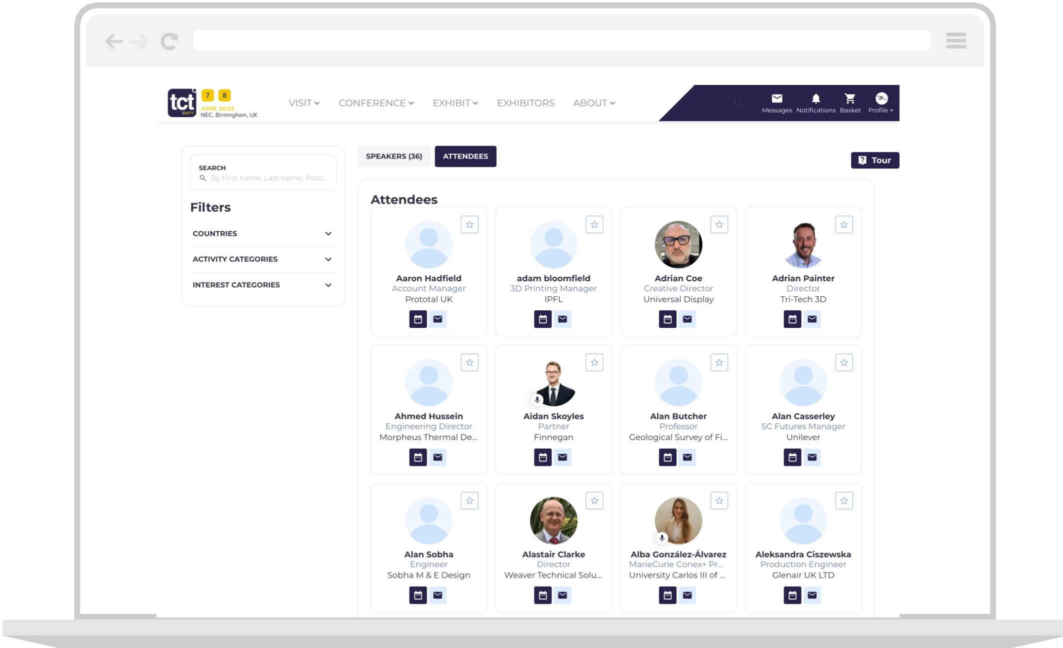
To get started, visit the **Attendee List.**

To navigate to the Attendee List from the Profile section, click on Settings then click on Attendee List in the new left navigation that appears.

Available filters include:

- Countries
- Activity categories
- Interest categories

Each person’s profile card can be clicked into for additional details about that person. There are also icons that allow you to add the person to your list of favourite's, send them a message, or send them a meeting request.



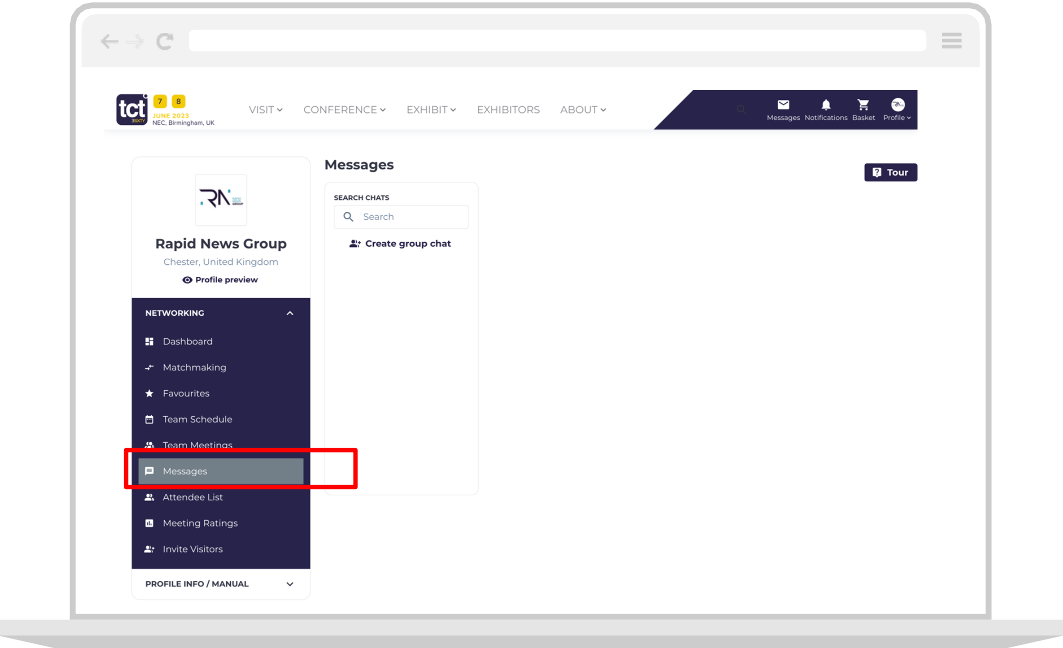
MESSAGING

Messages can be sent via the platform and the mobile app

To send a message, click on the envelope icon and begin typing your message.

At the top of the page, to the left of the profile picture, you'll see Messages and Notifications. When you receive a message, it will appear in Messages and you will also receive a notification under Notifications.

You can all see and search all of your messages by clicking on the profile picture in the upper right, then choosing Messages in the Networking section of the drop down menu.



REQUESTING A MEETING

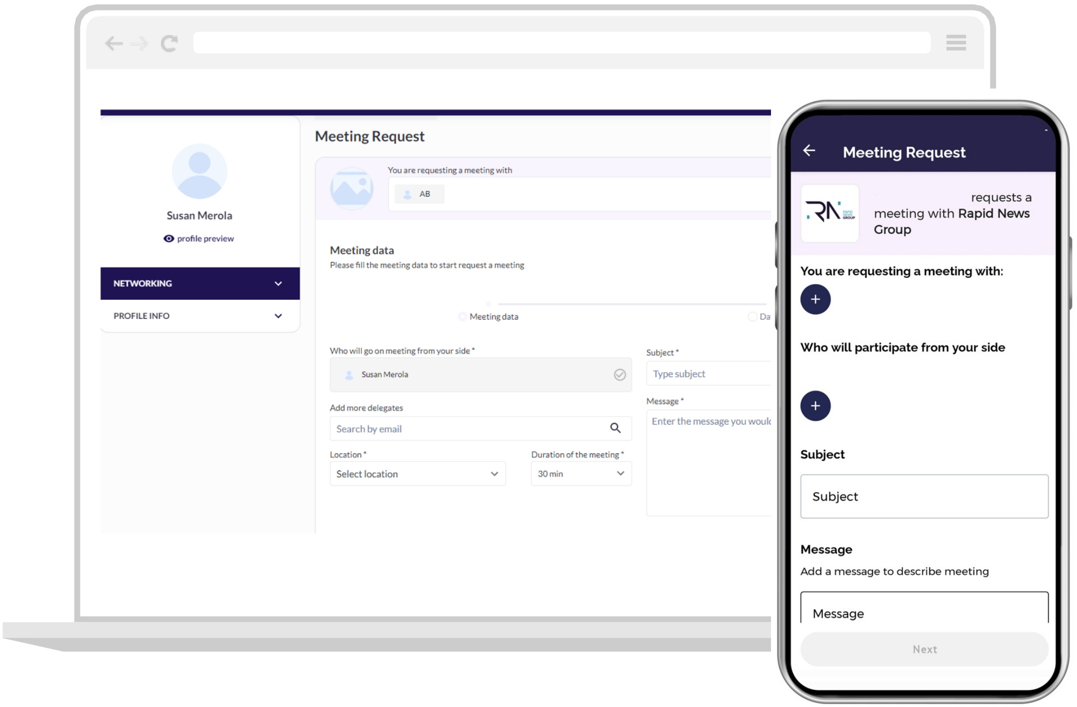
Meeting requests can be sent on the platform and the mobile app using the calendar icon 

To request a meeting, click on the icon and begin filling out the form.

In the first step you'll be asked for:

- Subject - what is the purpose of the meeting?
- Message - a short message about why you want to meet
- Others you wish to invite (optional) - Invite others to join your meeting using their email address
- Location to meet (online or at event)
- Duration of the meeting

In the second step, you'll be asked to select a date and time for the meeting and then your meeting request will be sent to the other party when you click the Request Meeting button.



SCANNING BADGES & MANAGING LEADS

SCANNING BADGES

Step 1: Log in using your exhibitor or team member credentials.
These are the same credentials that you use to log into the web platform.

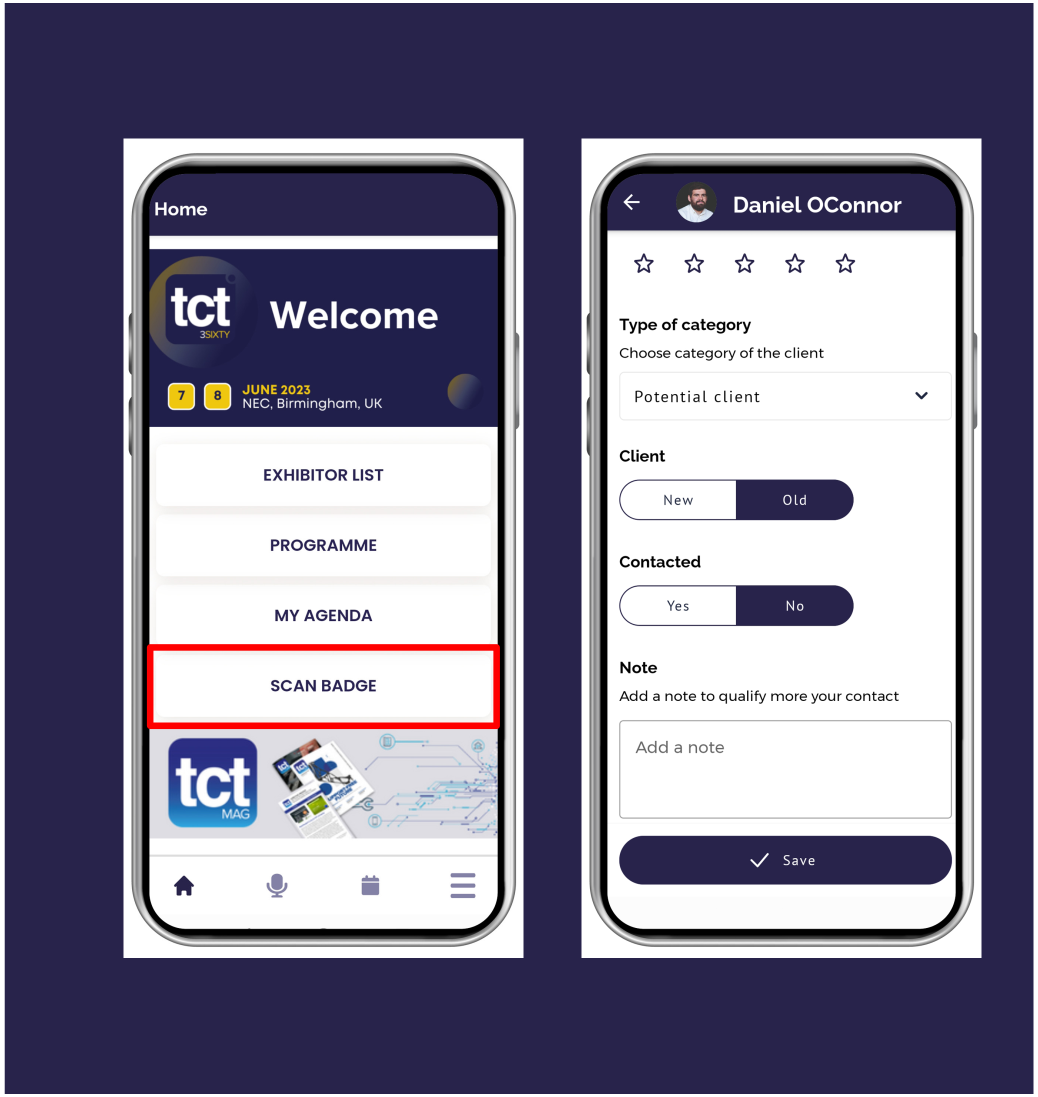
Step 2: To scan a badge, choose Scan Badges from the menu or side menu.

This will open your camera so you can scan the badge. When the camera is pointed at the badge, it will automatically scan. (Note- depending on your permission settings you may be asked to give the app permission to use the camera or may need to tap within the scan window to grant permission)

Step 3: After scanning add details and notes on the next screen.

On this screen you can add:

- What type of lead they are (Potential Partner, Potential Client, Supplier, Other)
- What type of client they are (New/Old)
- If they've been contacted (Yes/No)
- Lead Rating (1-5 stars)
- Any notes about the lead



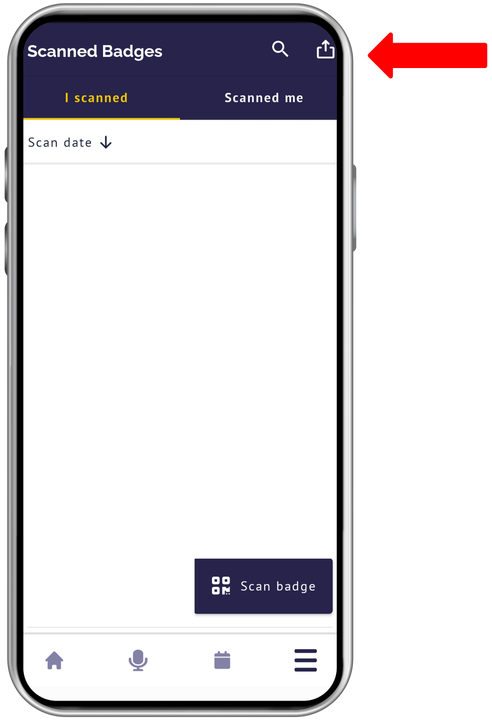
EXPORTING LEADS FROM THE MOBILE APP

Each person can view the badges that they've scanned by navigating to Scan Badges in the app.

On this screen, there is an Export link in the upper right that can be used to export the leads.

This will trigger an email to the user with an attached spreadsheet of leads which includes

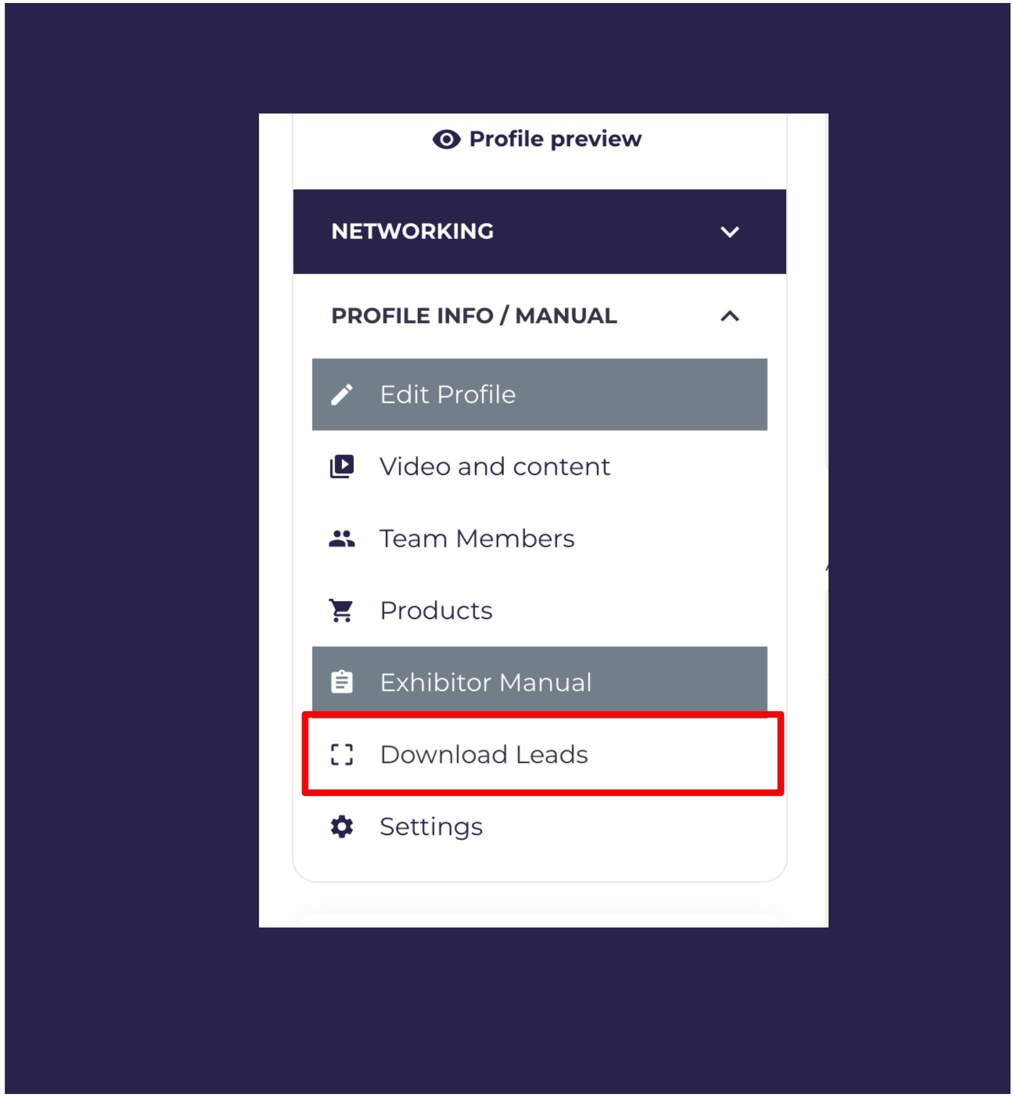
- Name
- Email
- Company
- Position
- Address
- Phone
- Star Rating
- Notes added
- Products the lead was interested in
- Type of client (new/old)
- Time scanned



EXPORTING LEADS

Leads can also be downloaded from the website.

- When accessed using the exhibitor profile this download will include all web and all scanned leads for all team members. This file contains all leads, the downloaded spreadsheet will have an additional column for Lead Owner.
- When accessed using a personal profile this download will include all web and all scanned leads for just that person.



SEE YOU AT THE SHOW!