

# **Self-Manage via the Exhibitor Portal**

Each exhibitor or exhibitor team contact will open the Exhibitor Portal directly and set up their Lead Management details. You will see a Leads Dropdown menu in your Exhibitor Portal. Only the primary contact has access to this Leads area of the portal, other exhibit staff registered through the portal will only have access to scanning leads onsite.

## **Lead Setup - Questions**

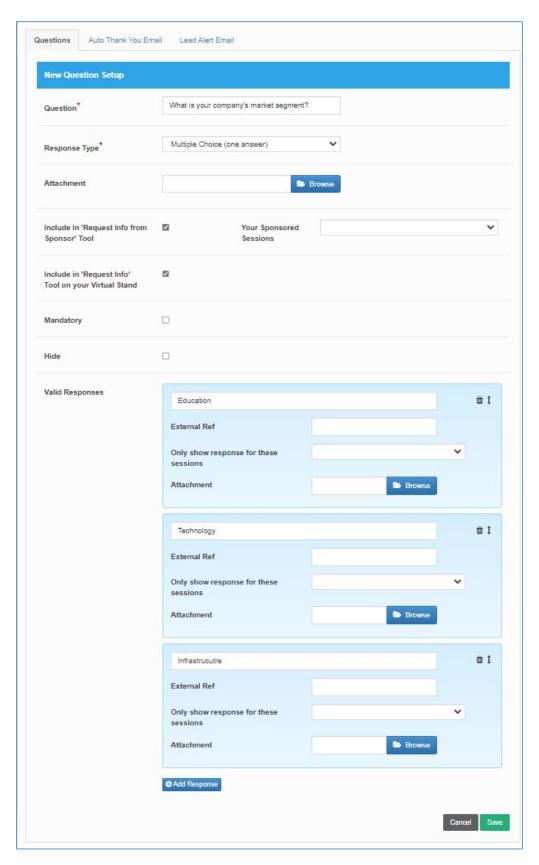
This is where you can create the profile questions that each attendee visiting your booth are asked (through the mobile attendee app). You can create your own list of profile questions that are unique to your company.

Selecting **Add New Question** will let you create questions with these settings:

- Question the actual text of the question, such as "What is your research specialty?"
- **Response Type** similar to survey questions, you can choose what type of responses you wish to display. Available response types are:
  - Multiple Choice (one answer)
  - Multiple Choice (one or more answers)
  - Single Textbox
  - Comment Box
  - Rating 1-5
  - Yes / No
  - True / False
  - Number
  - Date
- Mandatory check this box if you wish to this question to be answered by all leads
- **Hide** check this box if you wish to temporarily disable, or hide this question from the Lead Management function

**VIEW SCREENSHOT ON THE NEXT PAGE** 





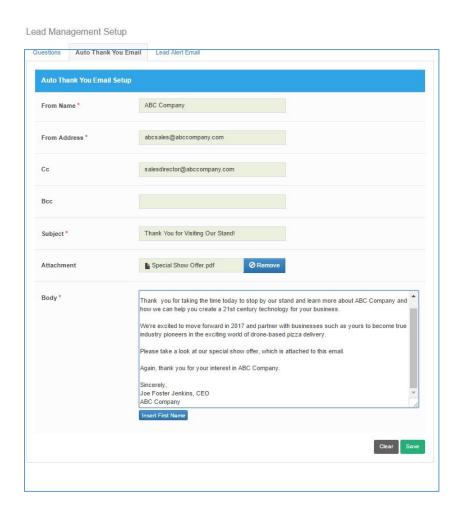


### **Auto Thank You Email**

You are able to configure an email that is automatically sent to each visitor immediately after the visitor badge scanned and questions are answered (if applicable).

## Options include:

- From Name and Address
- CC and BCC
- Subject
- Attachment you can attach a PDF document with special offers or other marketing messages
- Body you can also merge in the first name of the attendee visiting your booth for added personalization.



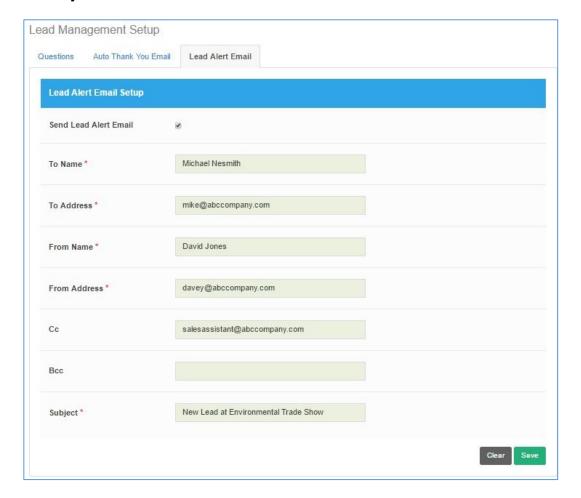


### **Lead Alert Email**

You are able to configure an email that is sent to a specified contact person. This could be a coordinator or sales manager at the home office or a team member at the conference.

## Options include:

- Send Lead Alert Email check this box to enable the sending of the Lead Alert Email
- To Name and Address
- From Name and From Address
- CC and BCC
- Subject





# **Exhibitor Steps for Using Lead Management Services**

#### Step One - Login to the Attendee App

All personnel who were registered through the exhibitor portal will have the Scan Leads button in their AHS meeting app. Login to the app per directions from AHS. Please see the registration desk with any issues.

#### **Step Two - Select Scan Leads**

This puts the attendee app into scan mode and is ready to either scan a bar code/QR code or the exhibitor can enter the name of the visiting attendee.

## **Step Three - Scan the Attendee Badge**



Select Scan Lead to use your device's camera to scan the attendee's bar code or QR code. When an attendee visits a booth, the exhibitor will use their mobile attendee app to directly scan the attendee's bar code or QR code.

### **Step Four - Answer Profile Questions**

When the contact's details are displayed, the exhibitor will be able to directly enter answers to the profile questions (if enabled by the exhibitor). Once the submit button is pressed, the lead details are collected and if enabled, a thank you email is immediately sent to the visiting attendee.

#### **Step Five - Reviewing Collected Leads**

During the exhibition or afterwards, you will be able to review collected leads by selecting **View Leads from the Mobile Attendee App** or **View Leads from the Exhibitor Portal.** When viewing from the Exhibitor Portal, you are also able to export your leads to an Excel Spreadsheet for further sales follow up and even view a graphical display of lead sources from world map.

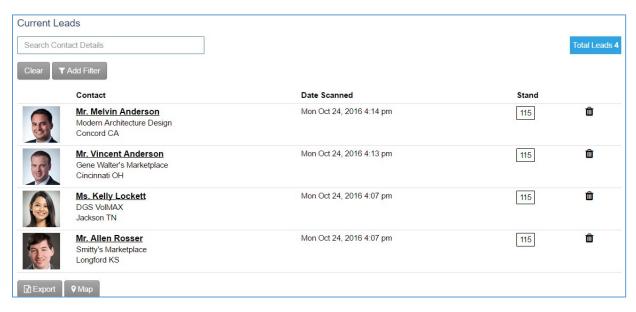
#### **Optional Lead Alert Emails**

In addition, if you enabled and configured Lead Alert Emails, designated parties are sent an email with the attendee details and profile question responses.



## Viewing Current Leads in the Exhibitor Portal

The Exhibitor portal lets you (from any location) view a list of leads collected at your booth.



### Options include:

- Attendee Detail clicking on the name of each attendee will display a detailed view that includes responses to profile questions and date/time the attendee visited your booth
- **Export** selecting Export will generate a spreadsheet with all information collected on attendees visiting your booth.
- **Map** selecting Map will display a world-wide map with geographic indicators for every visitor to your booth.

