

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.

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

Questions Auto Thank You Email Lead Alert Email

New Question Setup

Question*

Response Type*

Attachment [Browse](#)

Include In 'Request Info from Sponsor' Tool Your Sponsored Sessions

Include in 'Request Info' Tool on your Virtual Stand

Mandatory

Hide

Valid Responses

[🗑](#) [↑](#)

External Ref

Only show response for these sessions

Attachment [Browse](#)

[🗑](#) [↑](#)

External Ref

Only show response for these sessions

Attachment [Browse](#)

[🗑](#) [↑](#)

External Ref

Only show response for these sessions

Attachment [Browse](#)

[+ Add Response](#)

[Cancel](#) [Save](#)

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** - your exhibitor can attach a PDF document with special offers or other marketing messages
- **Body** - your exhibitor is also able to merge in the first name of the attendee visiting their stand for added personalization.

Lead Management Setup

Questions **Auto Thank You Email** Lead Alert Email

Auto Thank You Email Setup

From Name *

From Address *

Cc

Bcc

Subject *

Attachment [Remove](#)

Body *

Thank you for taking the time today to stop by our stand and learn more about ABC Company and how we can help you create a 21st century technology for your business.

We're excited to move forward in 2017 and partner with businesses such as yours to become true industry pioneers in the exciting world of drone-based pizza delivery.

Please take a look at our special show offer, which is attached to this email.

Again, thank you for your interest in ABC Company.

Sincerely,
Joe Foster Jenkins, CEO
ABC Company

[Insert First Name](#)

[Clear](#) [Save](#)

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**

Lead Management Setup

Questions Auto Thank You Email **Lead Alert Email**

Lead Alert Email Setup

Send Lead Alert Email

To Name * Michael Nesmith

To Address * mike@abccompany.com

From Name * David Jones

From Address * davey@abccompany.com

Cc salesassistant@abccompany.com

Bcc

Subject * New Lead at Environmental Trade Show

Clear Save

Exhibitor Steps for Using Lead Management Services

Step One - Login to the Attendee App

All stand personnel will use the same login name and password for the primary contact person who purchased the stand. There is no limit to the number of personnel who are able to log into the app.

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 stand, 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.

Current Leads			
<input type="text" value="Search Contact Details"/>			Total Leads 4
Clear ▼ Add Filter			
Contact	Date Scanned	Stand	
 <p>Mr. Melvin Anderson Modern Architecture Design Concord CA</p>	Mon Oct 24, 2016 4:14 pm	115	🗑️
 <p>Mr. Vincent Anderson Gene Walter's Marketplace Cincinnati OH</p>	Mon Oct 24, 2016 4:13 pm	115	🗑️
 <p>Ms. Kelly Lockett DGS VollMAX Jackson TN</p>	Mon Oct 24, 2016 4:07 pm	115	🗑️
 <p>Mr. Allen Rosser Smitty's Marketplace Longford KS</p>	Mon Oct 24, 2016 4:07 pm	115	🗑️
📄 Export 📍 Map			

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 stand.
- **Export** - selecting Export will generate a spreadsheet with all information collected on attendees visiting your stand.
- **Map** - selecting Map will display a world-wide map with geographic indicators for every visitor to your stand.

