Conference Leads Manual

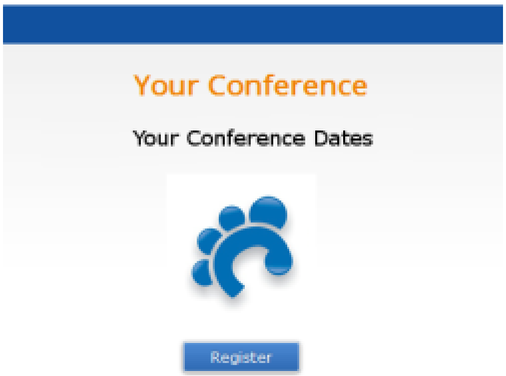
Need to print a copy of this manual? Click the link below to download the PDF:

Conference Leads Manual

Conference Leads Portal

Register as an Exhibitor for the Conference

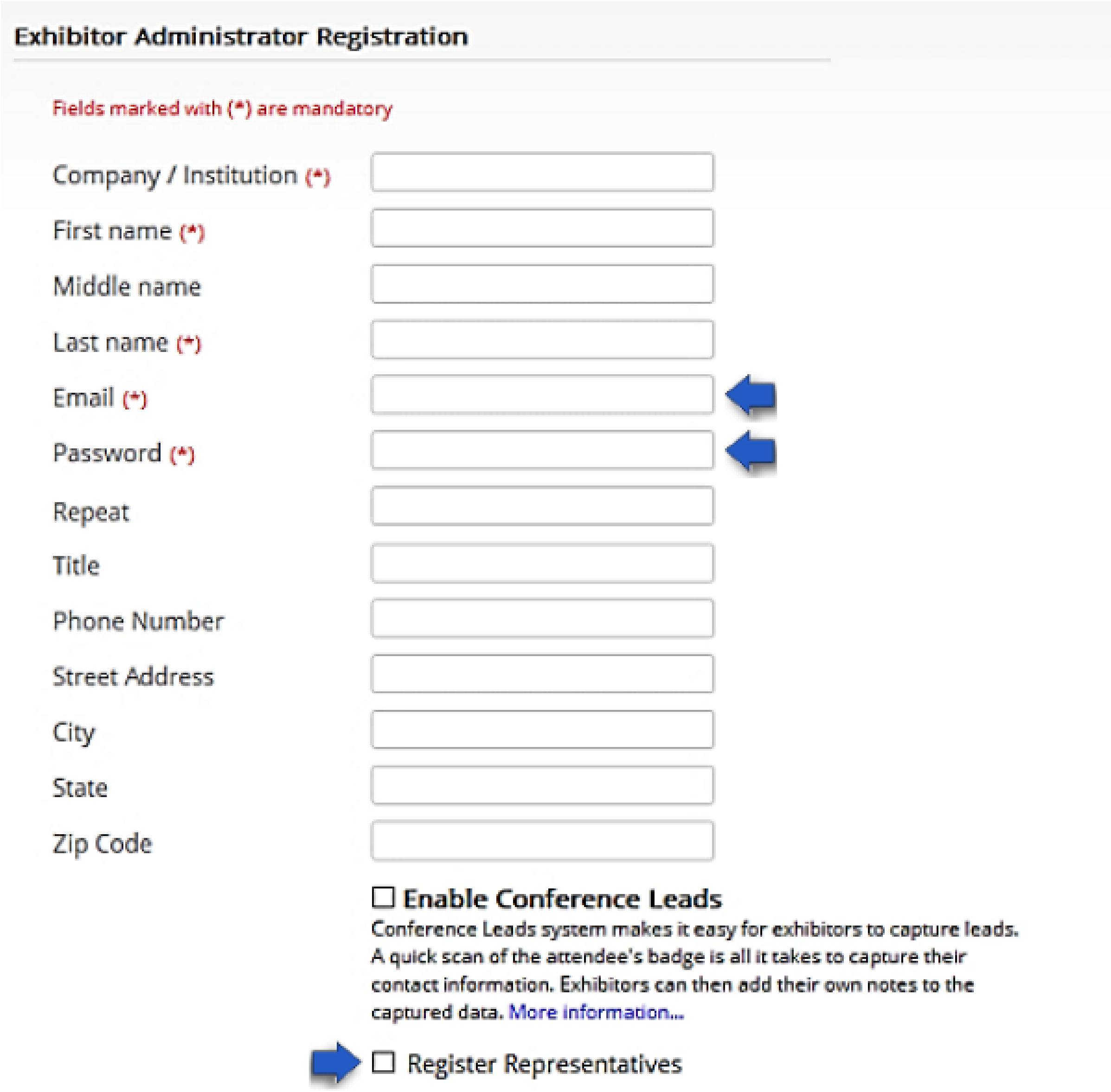
This information should be provided by your conference management team. If they did not provide it this is a sample of how you would register:



Register using the link sent to you by your conference organizer. You will create your user login information during the registration process.

You can locate your **domain** in the registration link:

http://www.conftrac.com/domain/exhibitor

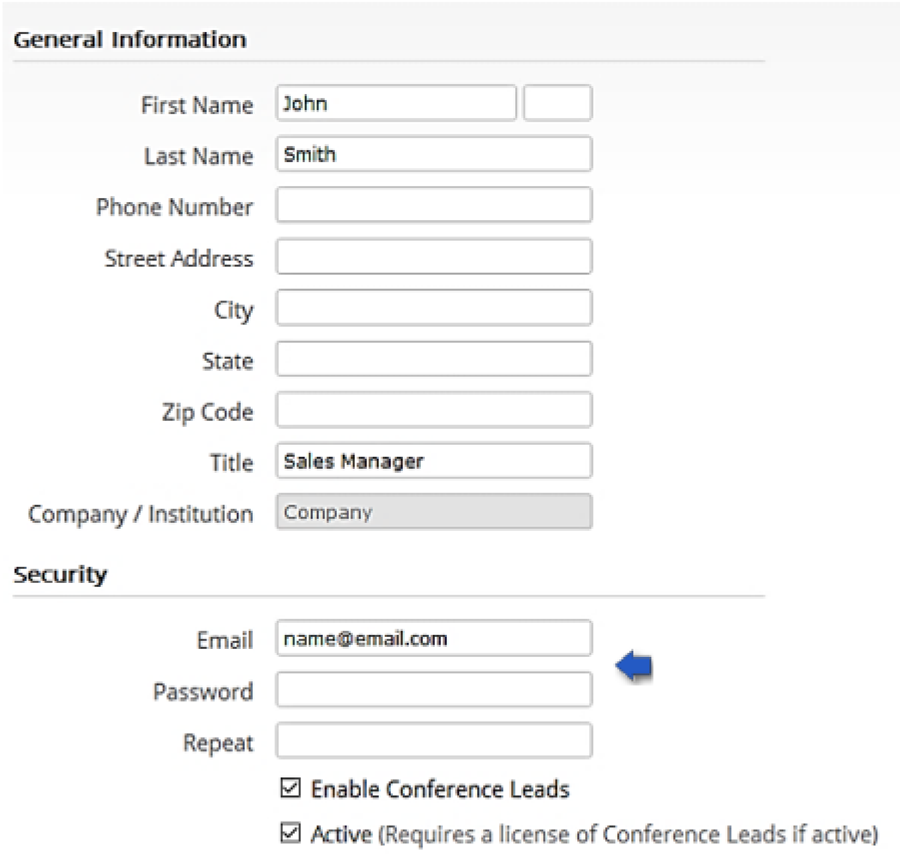


The email address (username) and password entered here will be used to login to your Conference Leads app and web portal. Be sure to store your password in a secure place. If the administrator will be using the Conference Leads, check the box called "Enable Conference Leads." If the administrator will not be using lead retrieval, then the first box should remain unchecked.

To register for lead retrieval licenses, check the Register Representatives box and check the Enable Conference Leads for each representative.

Create Passwords for your Reps

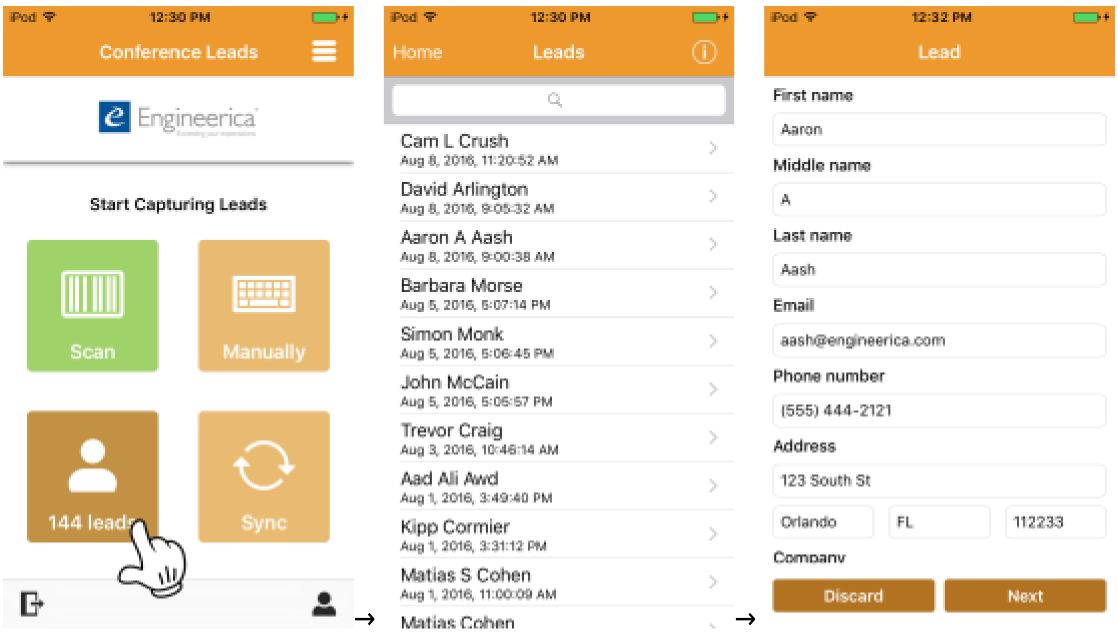
Click on Exhibitor Representatives to create secure passwords for your reps.



For security purposes we do not email passwords. Be sure to create your representatives password in a secure place and provide them with their credentials.

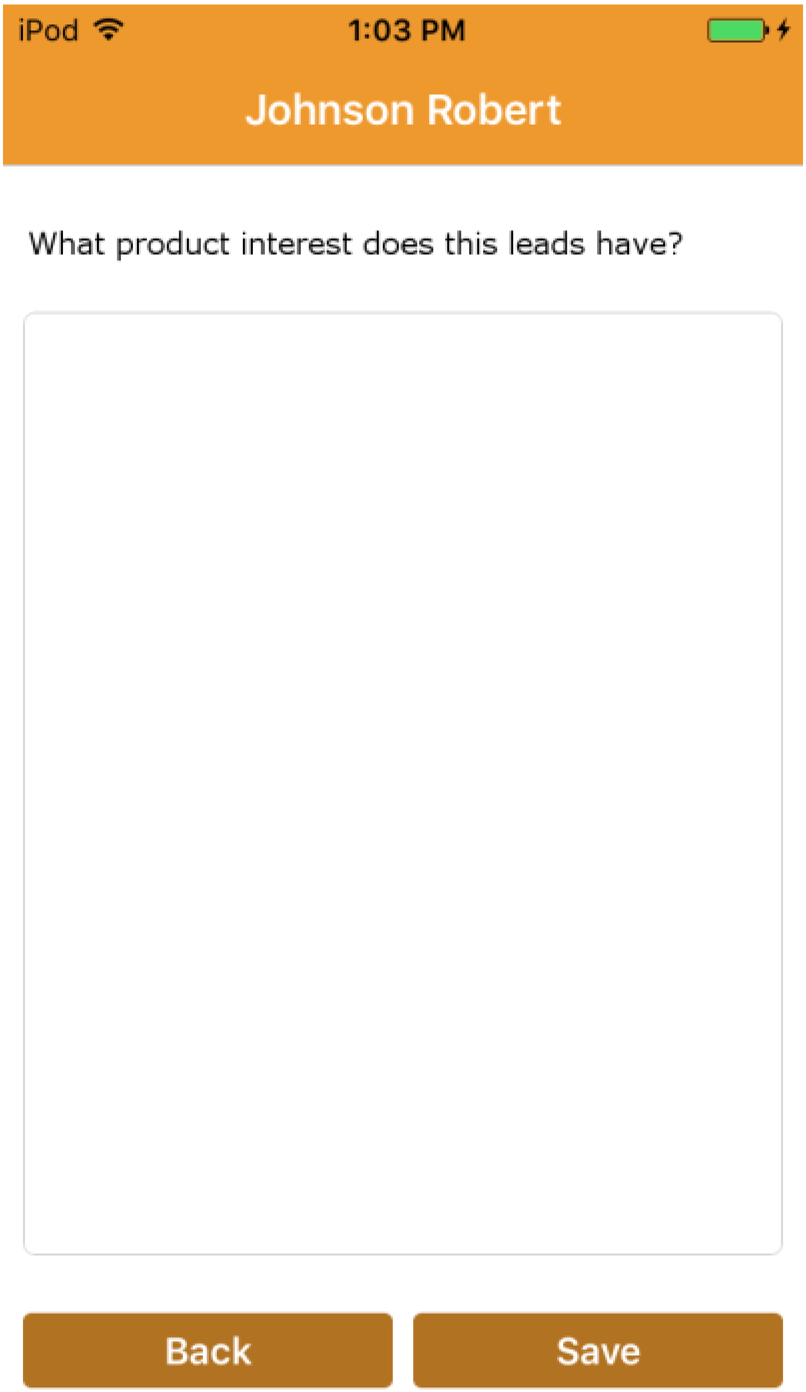
Viewing and Editing Captured Leads

Tap the button on the bottom of the welcome screen to view a list of captured leads.



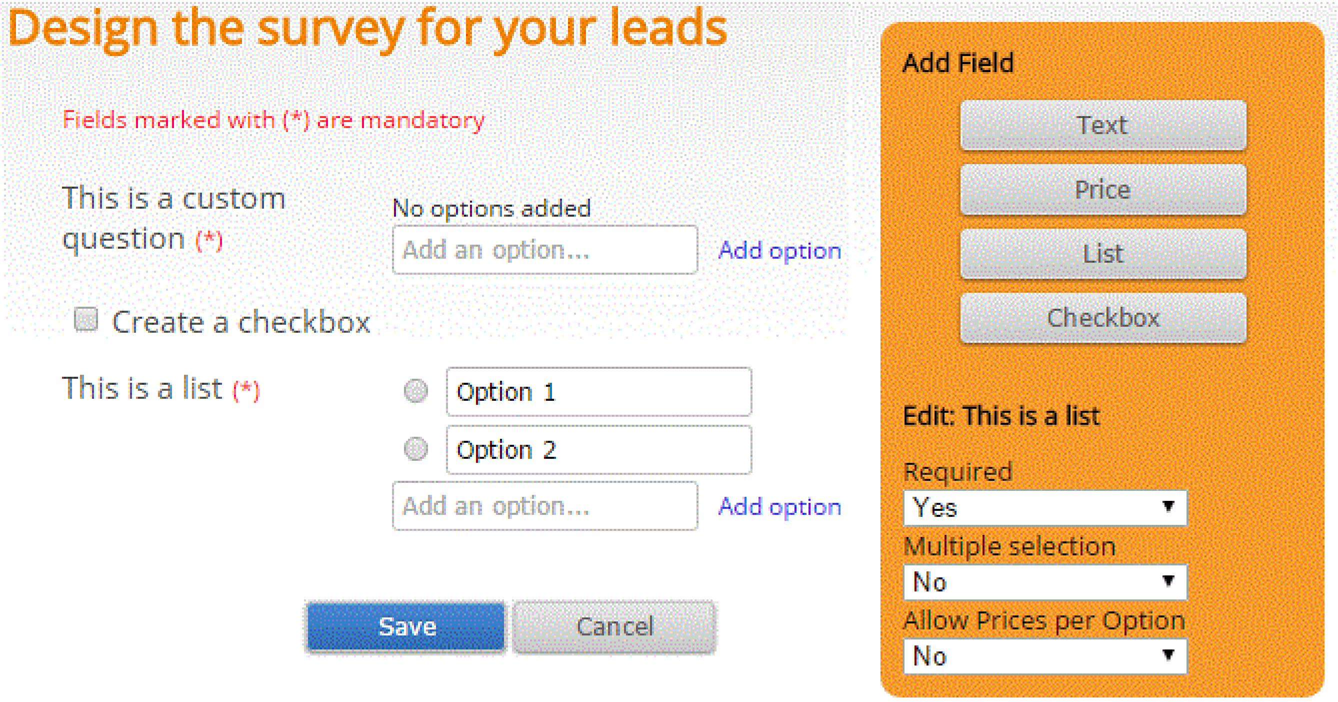
Creating Custom Qualifying Questions

Conference Leads allows your company's administrator to create custom qualifying questions. These questions will appear on your Conference Leads app after you capture a lead.



To create custom qualifying questions on the app you'll need to click on **Setup custom sales lead qualifiers** in the **Leads** section of the website/web interface first.

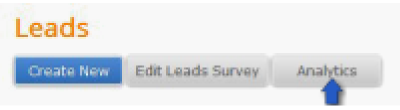
The Leads Survey allows you to add any text, lists, checkboxes, and options such as required responses for a question in the survey.



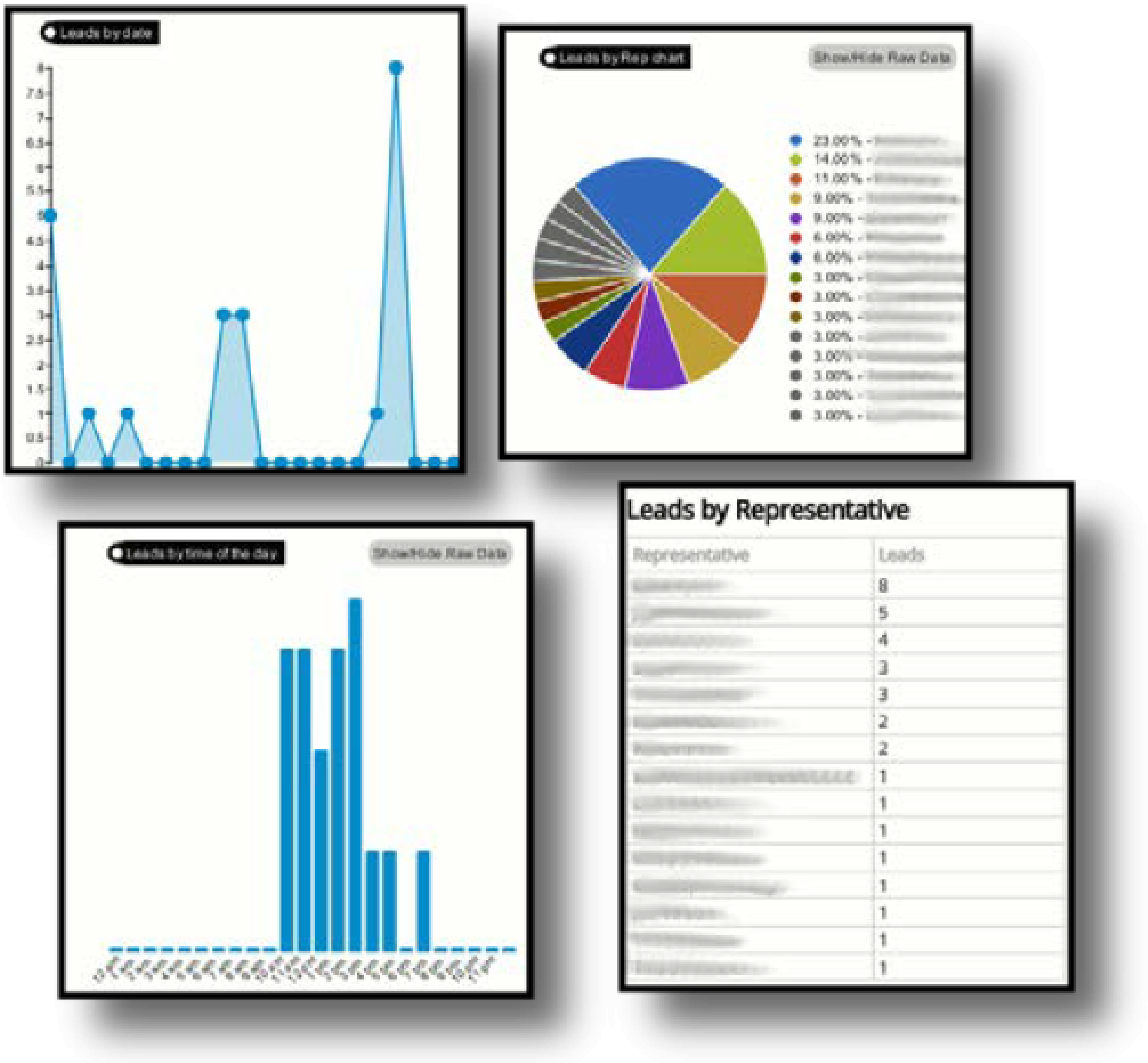
These questions will be available on the Conference Leads app to each license holder once a lead has been captured.

Only the Leads Administrator has access to creating the survey. It is recommended that the qualifying questions are produced prior to the show and not changed once any leads have been captured.

View your Leads Analytics



Also under Leads you'll find Analytics. These analytics illustrate who on your team captured the most leads for the company.



This data can be printed out my clicking the "**Print Report**" button at the top of the page.

Export Leads

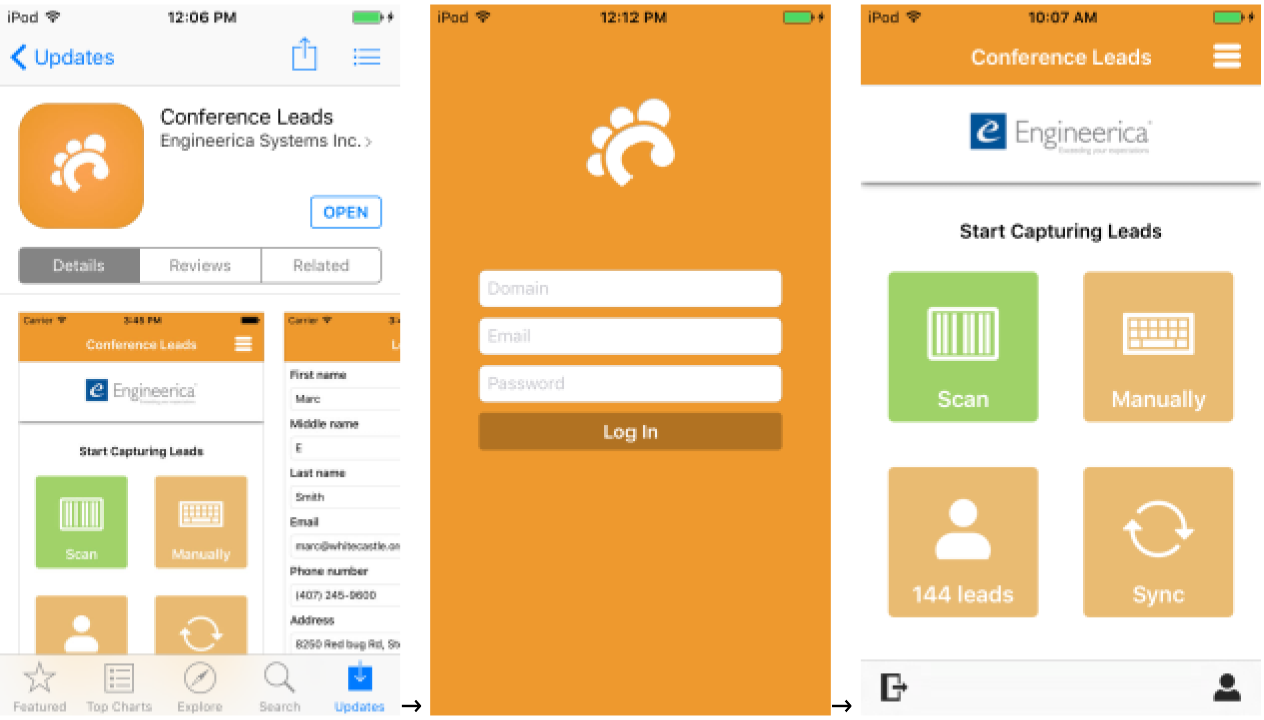
Under Advanced Options select Export Data. This is where you can download an **Excel**CSV**HTML** file format of the leads for your entire Company including the Representative who captured the lead at the conference.

Now simply upload the data to your CRM or other databases as needed.

Conference Leads App

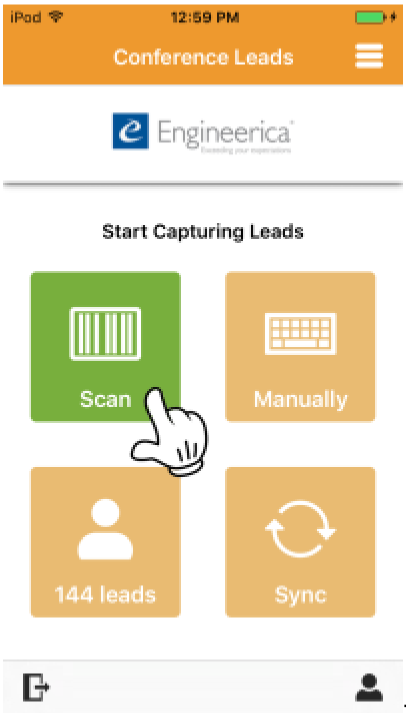
App Installation and Login

1. Download the **Conference Leads** app. First you must download the app to install it and you can find the app for download in both Google Play Store for Android and App Store for Apple devices.
2. Once the app is downloaded, open it and enter your Login credentials:
    - **Domain**: Given to you by the Conference Management
    - **E-mail**: Your e-mail address
    - **Password**: Created by Company Administrator
3. If you log in successfully, the app will download your conference data and will show a welcome screen. You should see your name and company on the welcome screen. You are now ready to start capturing leads!



Capturing Leads

1. From the app's welcome screen, tap the "Scan" button. The first time you do this your device will ask you to give the app access to the camera. Make sure to click "OK"
2. To capture a lead's contact information, aim your camera at the barcode or QR code on the badge.
3. When the barcode is read, the app will display a contact screen with known fields already filled in.
4. If a desired field is missing or to edit a field, simply tap on it and type.
5. You can scroll down to the bottom for an open text area. You can type any notes you'd like about this lead here.
6. Tap "Next" and answer any custom qualifying questions created for your account.
7. Tap "**Save**" on the upper right corner to save the contact info.



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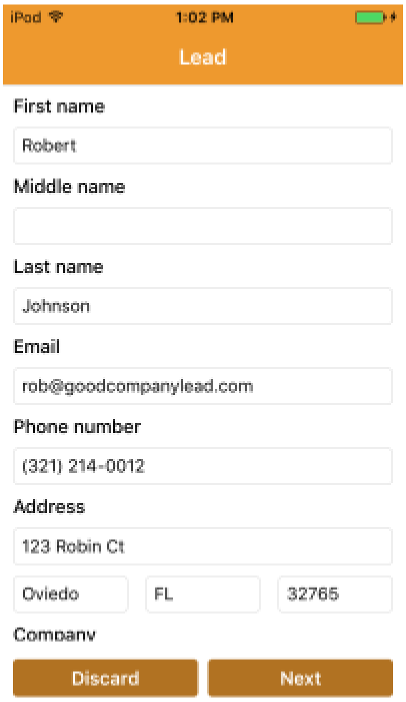

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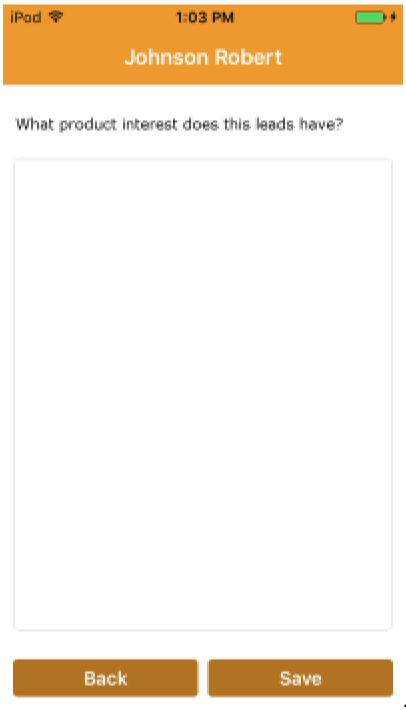

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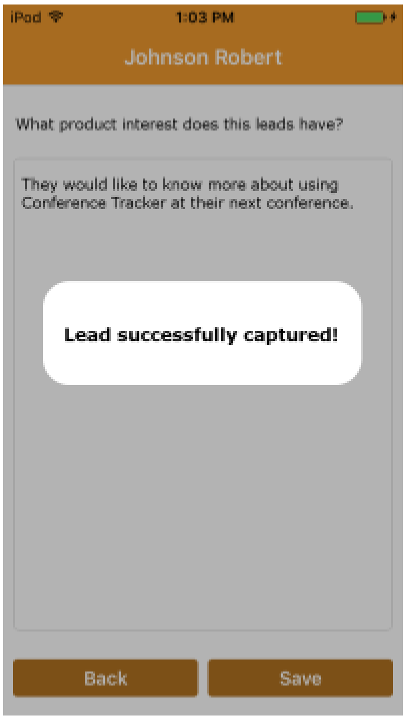


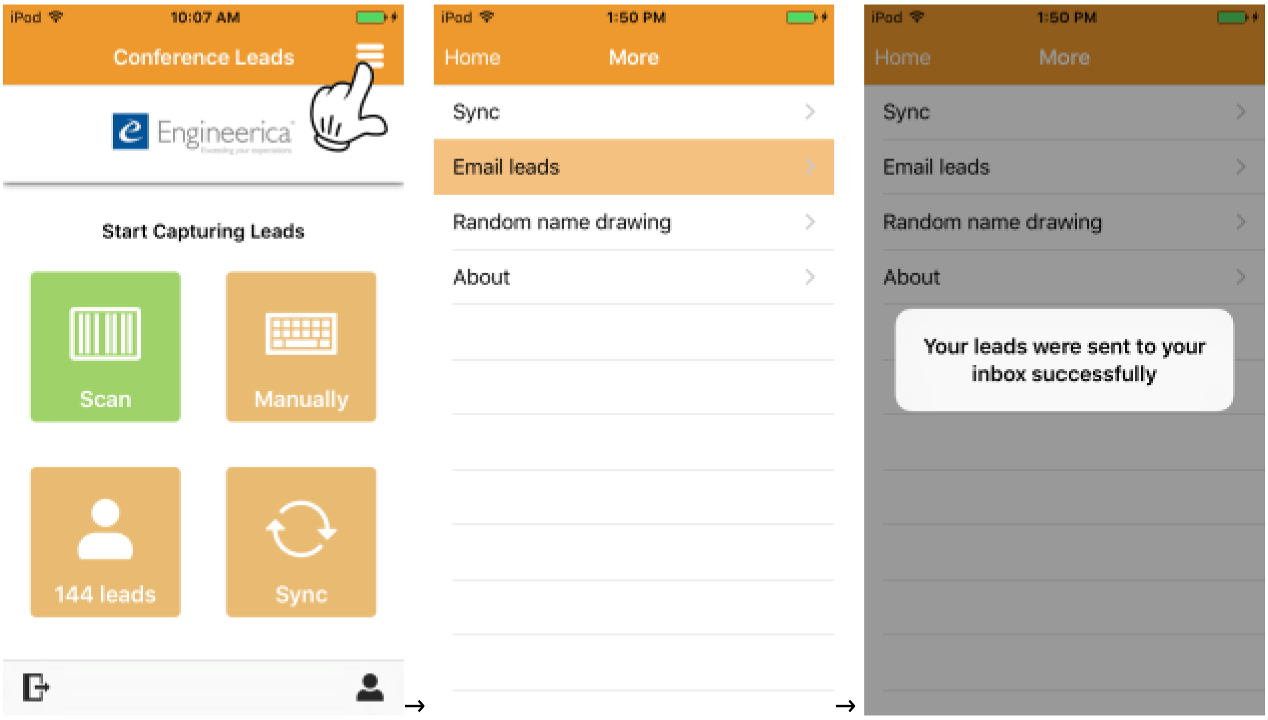
Entering Leads Manually

Only used if the contact does not have a conference badge, this way you can still add the lead manually:

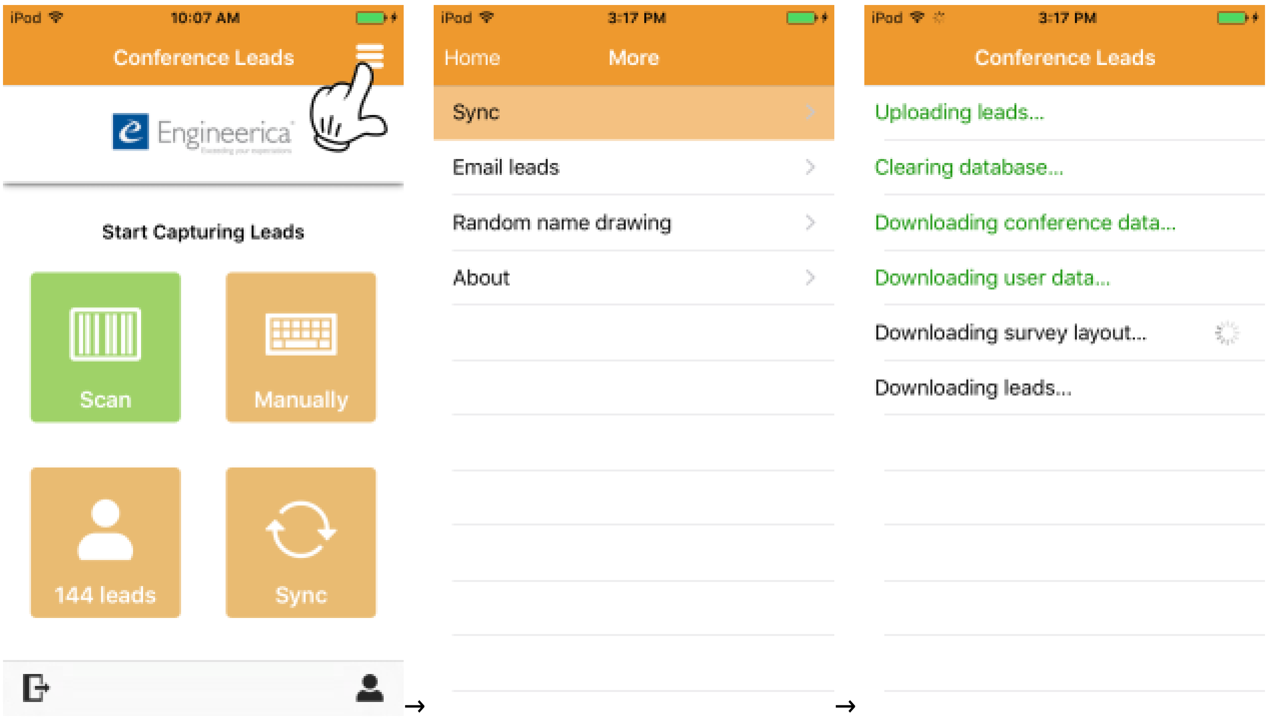
1. From the app's welcome screen, tap the "Manual" button.
2. The app will display a contact screen with blank fields.
3. Fill in name and desired contact info.
4. You can scroll down to the bottom for an open text area. You can type any notes you like about this lead here.
5. Answer any custom qualifying questions set up for your account.
6. Tap "**Save**" on the upper right corner to save the contact info.

Options

In Options you can email your captured leads to yourself, Sync the app to a cloud based secure server, logout of the device, and change your settings.



IMPORTANT: If you do not have an Internet connection during the conference, you **must sync** the device when Internet connection is available immediately **before** and also **after** the conference. The sync prior to the conference will set up the app for scanning attendees, while the sync after the conference will transmit the captured scans to the server to enable you to view, export, or email the captured leads.

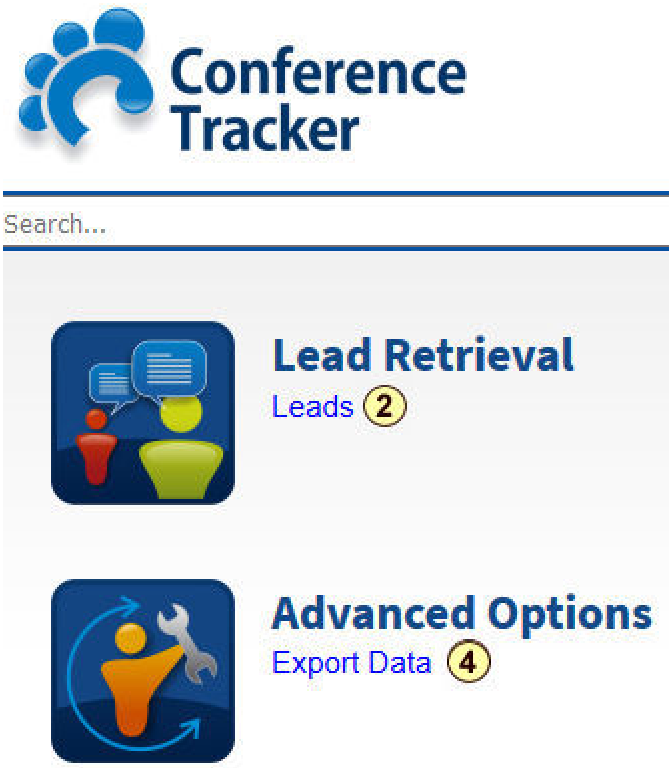


You can just tap **Sync** button on the main screen too (first image above).

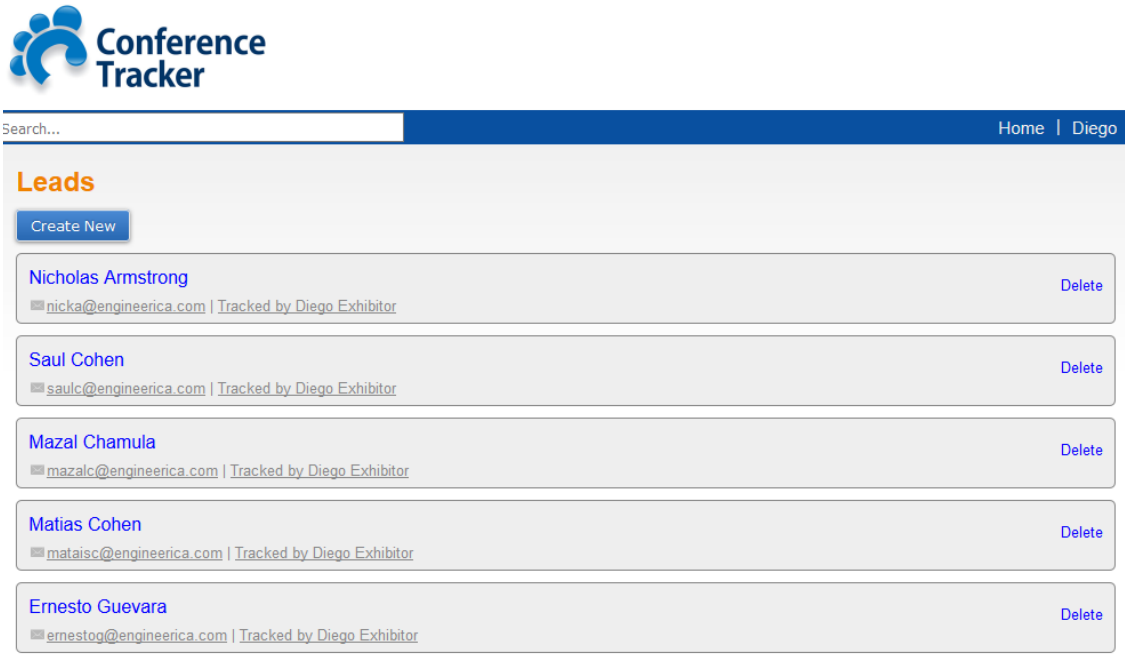
View your leads Collected!

Now that you have captured your leads with Conference Leads, how do you view these leads?

There are three ways:

1. **Viewing the Leads on the Conference Leads App**
    - Simply click on “Leads” in the app's screen or menu to view a list of your captured leads. To view the info of a certain lead, click on it.
2. **Getting the Leads List via Email**
    - If you would like a copy of the leads delivered to you via email, simply click the “Email Leads” from the app. Make sure to sync the device before you do this.
3. **Viewing the Leads via your Conference Leads Cloud Account**
    - Once you have done a sync to upload your leads to the server, you can view your leads online by logging to the Conference Tracker website to view or export a list of captured leads:
    1. Login to the Conference Tracker website using the following credentials:
        - From the http://www.conftrac.com website:
        - **Domain**: Given to you by your Conference Management.
        - **E-mail**: Your e-mail address (typically).
        - **Password**: Given to you by your Conference Management.
    2. To view the leads you have gathered during the conference click on the Leads link on the Conference Tracker home screen under Lead Retrieval.
        - 

    3. Notice you will get a list that looks like this when viewing the data in Conference Tracker.

- 

4. To export the leads you have gathered during the conference click on the Export Data link on the Conference Tracker home screen under Lead Retrieval.

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