Conference
Leads

Version 1.0 – October 2017

Engineerica

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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

Your Conference

Your Conference Dates
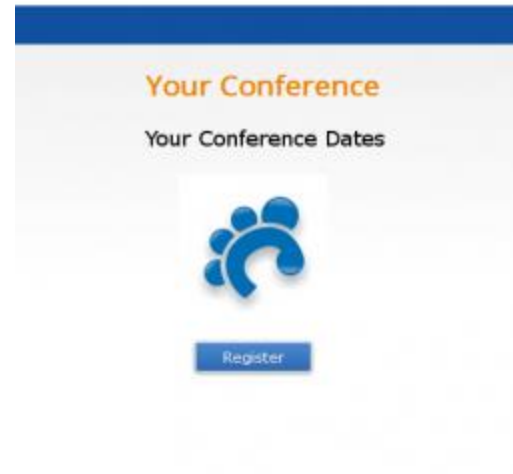
Register

Exhibitor Administrator Registration

Fields marked with (*) are mandatory

Company / Institution (*)

First name (*)

Middle name

Last name (*)

Email (*)

Password (*)

Repeat

Title

Phone Number

Street Address

City

State

Zip Code

☐ **Enable Conference Leads**
Conference Leads system makes it easy for exhibitors to capture leads. A quick scan of the attendee's badge is all it takes to capture their contact information. Exhibitors can then add their own notes to the captured data. More information...

☐ Register Representatives

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.

Lead Retrieval
Leads | Random Name Drawing
Online Exhibitor Registration
Exhibitor Representatives
Exhibitor Administrators

General Information

First Name	John
Last Name	Smith
Phone Number	
Street Address	
City	
State	
Zip Code	
Title	Sales Manager
Company / Institution	Company

Security

Email	name@email.com
Password	
Repeat	

☑ Enable Conference Leads
☑ Active (Requires a license of Conference Leads if active)

For security purposes, **we do not email passwords**. Be sure to keep your representative's 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.
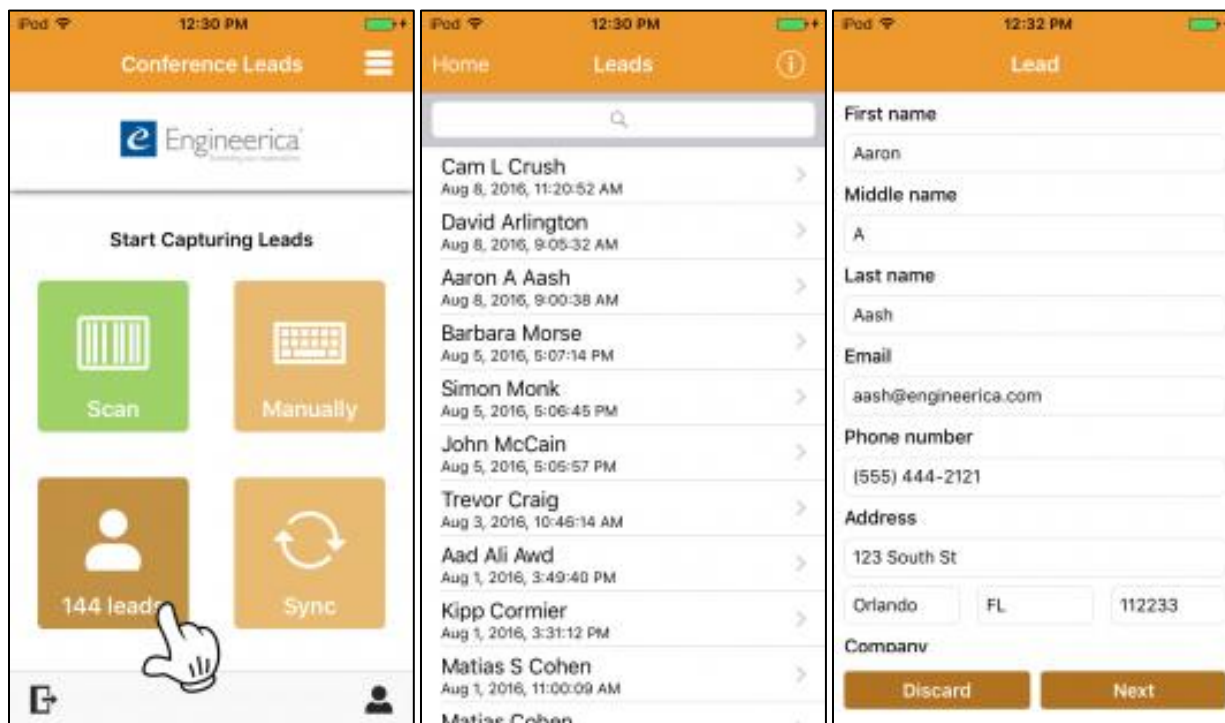
Create Custom Qualifying Questions

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 **Leads > Edit Leads Survey** in the web interface first.

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

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, as well as other points of interest. This data can be printed out my clicking the **Print Report** button at the top of the page.
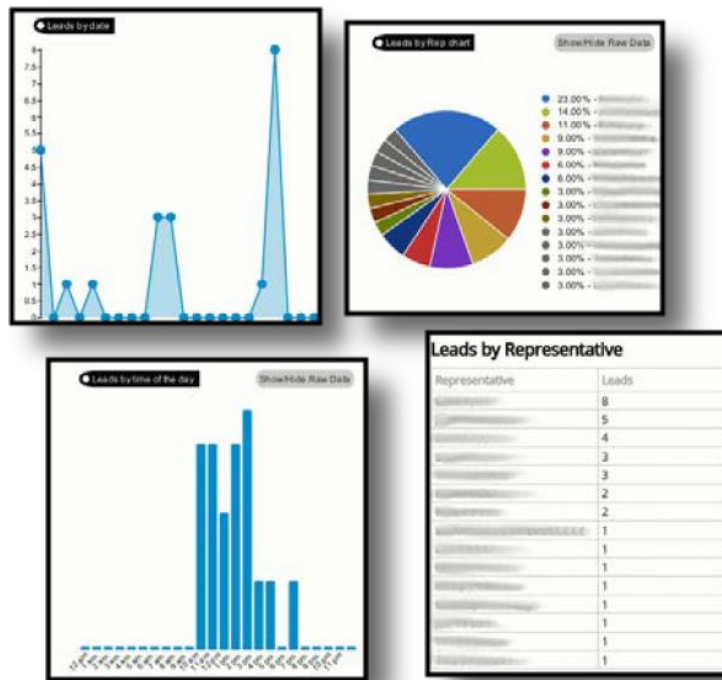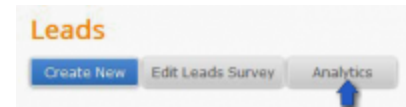

Export Leads

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.
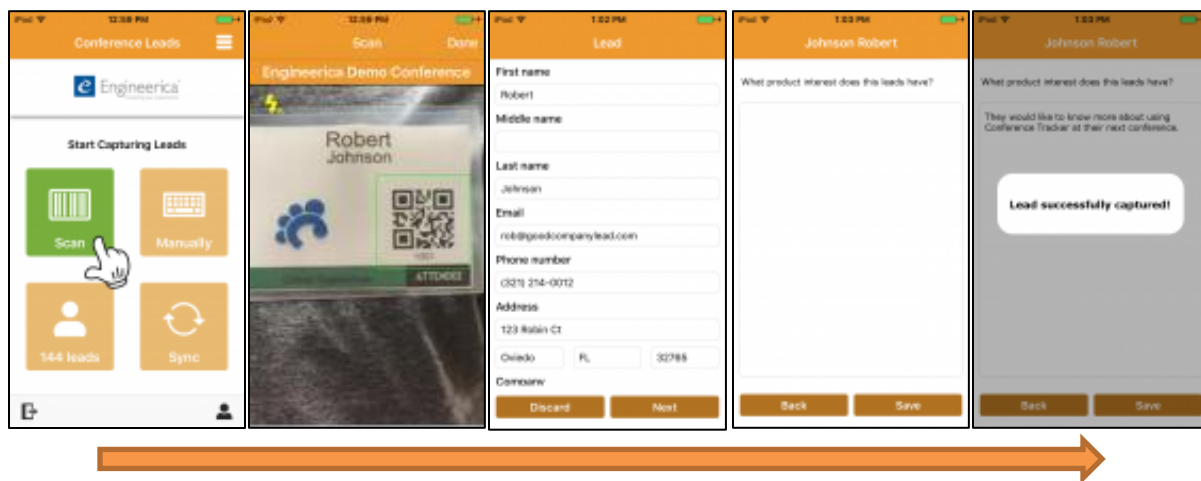
Conference Leads App

App Installation and Login

1. Download the **Conference Leads** app. You can find the app download at the Google Play Store (Android) and the App Store (Apple).
2. Once the app is downloaded, launch it and enter your login credentials.
   - **Domain:** Given to you by the conference management.
   - **E-mail**: The e-mail address used to create your account.
   - **Password**: Chosen by the company administrator that created your account.
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 displayed here. You are now ready to start capturing leads!
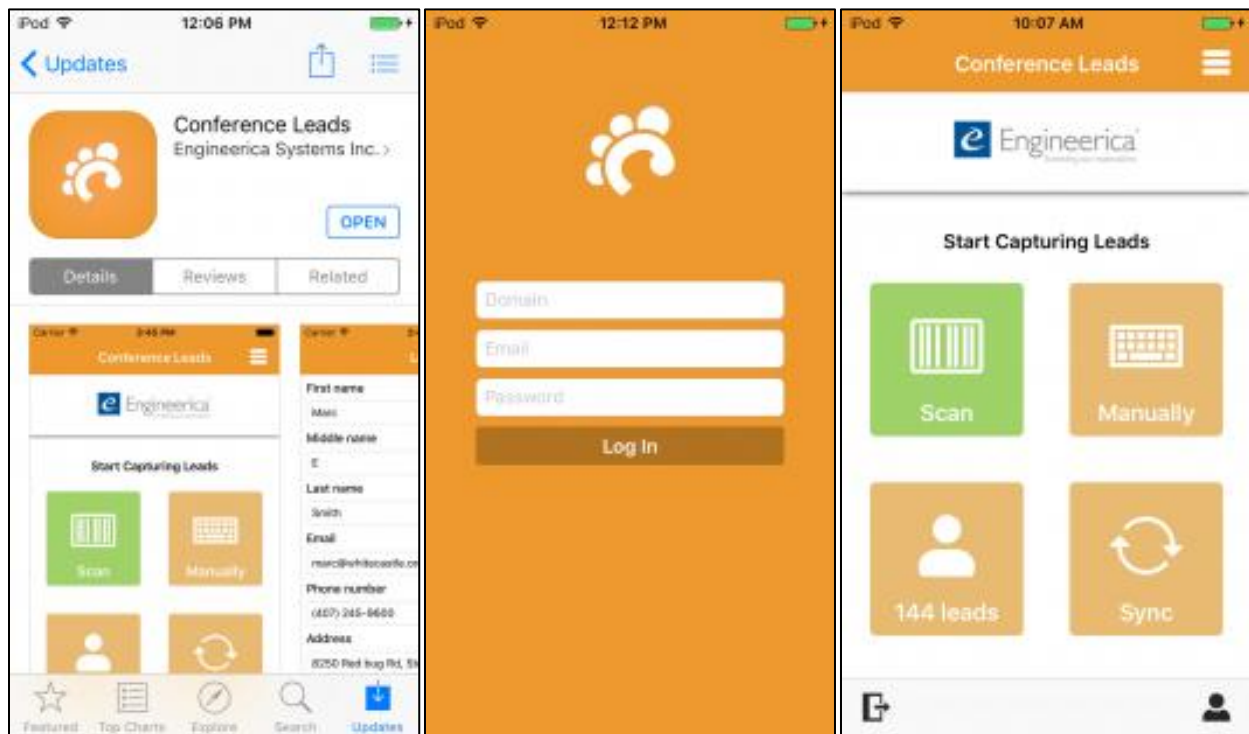
Capturing Leads

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 tap **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 you wish to edit a field, simply tap on it.
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.

Entering Leads Manually

Only used if the contact does not have a conference badge. This way, you can still add the lead without scanning.

1. From the app's main menu, tap the **Manual** button.
2. The app will display a contact screen with blank fields.
3. Fill in the 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, or change your settings.
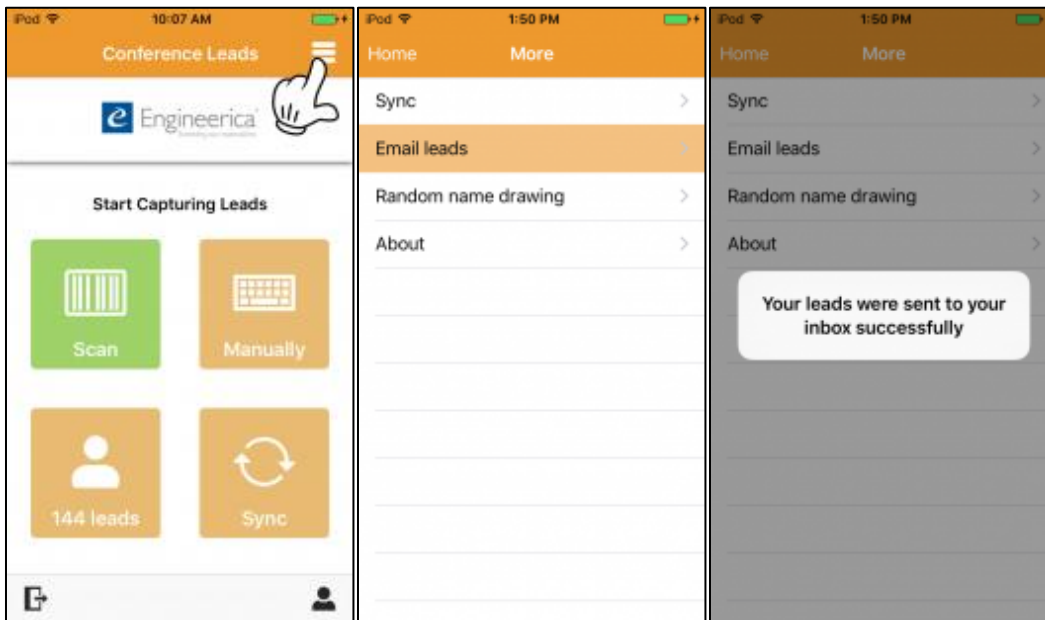
IMPORTANT: If you do not have an Internet connection during the conference, you **must sync the device when Internet connection is available immediately before and also after the conference**. The sync prior to the conference will set up the app for scanning attendees, while the sync after the conference will transmit the captured scans to the server to enable you to view, export, or email the captured leads. You can tap **Sync** in the main menu to easily sync your device.
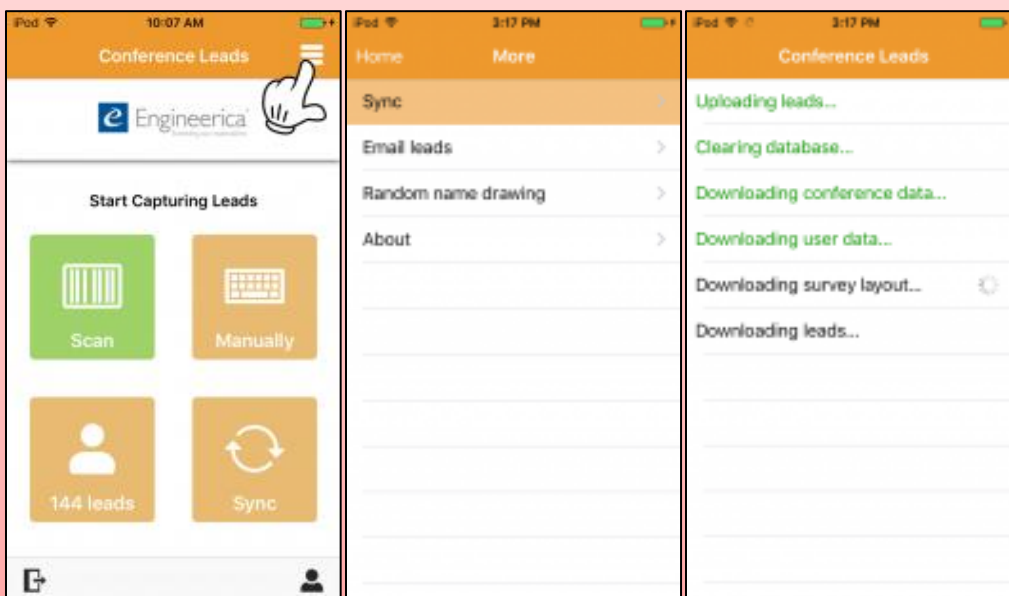
View your Leads Collected!

Now that you have collected your Leads, how do you view them?

There are three ways:

1. **Viewing the Leads on the Conference Leads App**
   - Simply click on **Leads** in the app's main menu to view a list of your captured Leads. To view the information of a specific lead, simply tap on them.
2. **Getting the Leads List via Email**
   - If you would like a copy of the leads delivered to you via email, simply tap on **Email Leads** from the **Options** menu. 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.

     i. Login to the **Conference Tracker** website using the following credentials.
        - **Domain:** Given to you by your conference management.
        - **E-mail**: The e-mail used to create your account.
        - **Password**: Chosen by the conference administrator that created your account.

     ii. To view the Leads you have gathered during the conference, click on the **Leads** link on the **Conference Tracker** main menu under **Lead Retrieval**.

     iii. Notice that you will get a list that looks like the image below when viewing the data in **Conference Tracker**.

     iv. To export the Leads you have gathered during the conference, click on the **Export Data** link on the **Conference Tracker** main menu under **Lead Retrieval**.