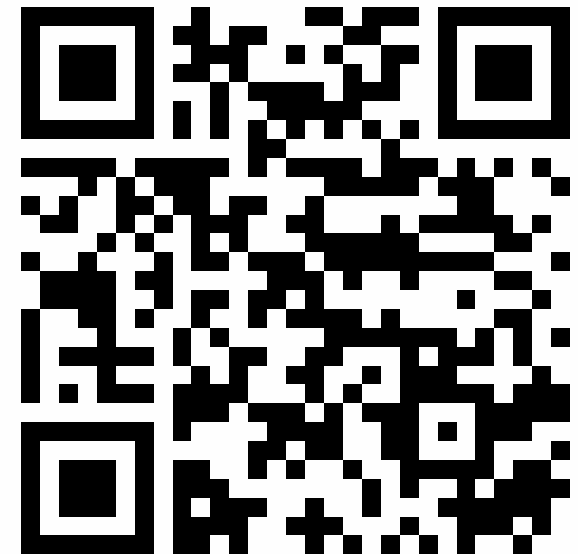# Guide for Leads app (Contact person)

A step by step guide on how to setup the Leads app alongside how to scan and capture a lead.

1. Download the Leads app

Download the Eventbuizz Lead scanner app to your phone via App Store/Google Play or scan the QR-code.

2. Add profiles

Navigate to App → Sponsors/Exhibitors → Sponsors list / Exhibitors list
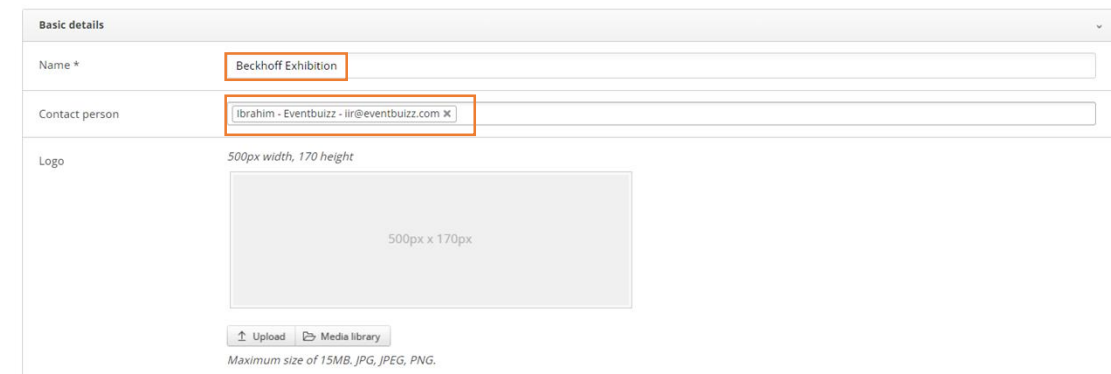
Click on "+ Add"

Fill in the of the sponsor/exhibitor and assign a contact person

Click on Save at the bottom of the page

3. Products

Navigate to App → Sponsor/Exhibitors → Settings (The cogwheel to the right)

To select whether to display Products in the Leads app, set Products Catalogue accordingly.

Receive lead email on save	
Show lead email button	
Enable signature	
Enable auto capture	
Product catalogue	
Consent management	
Exhibitors can change categories	
Display attendees surveys	

4. Consent management

Navigate to App → Sponsor/Exhibitors → Settings (The cogwheel to the right)

To select whether to display Consents in the Leads app, set Consent management accordingly.

Receive lead email on save	
Show lead email button	
Enable signature	
Enable auto capture	
Product catalogue	
Consent management	
Exhibitors can change categories	
Display attendees surveys	

5. Forms

Navigate to App → Sponsor/Exhibitors → Settings (The cogwheel to the right)

To select whether to display Forms in the Leads app, set Display attendees surveys accordingly.

Receive lead email on save	
Show lead email button	
Enable signature	
Enable auto capture	
Product catalogue	
Consent management	
Exhibitors can change categories	
Display attendees surveys	

6. Leads app setup

Navigate to App → Leads Management→ Settings (The cogwheel to the right)

Disable Allow leads users

Enable Login with authentication

Click Save at the bottom of the page

Leads settings

Display settings		
Verification code		686671
Allow leads users		
Login with authentication code		
Signup with organizer approval		
Allow business card		
Receive lead email on save		
Show lead email button		
Enable signature		
Enable auto capture		
Last date & time for capture new leads	0000-00-00	00:00

7. Start screen

Enter the event code. For this instance, it is 10322.
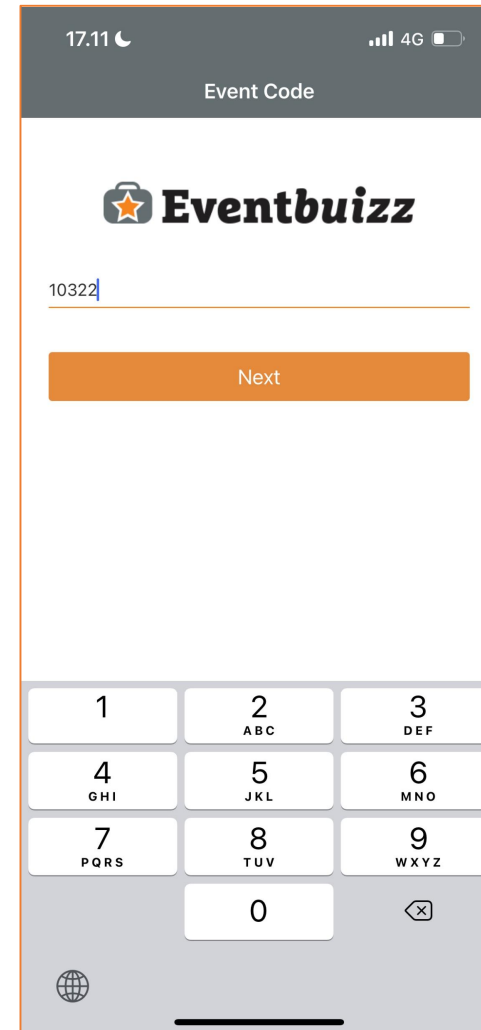
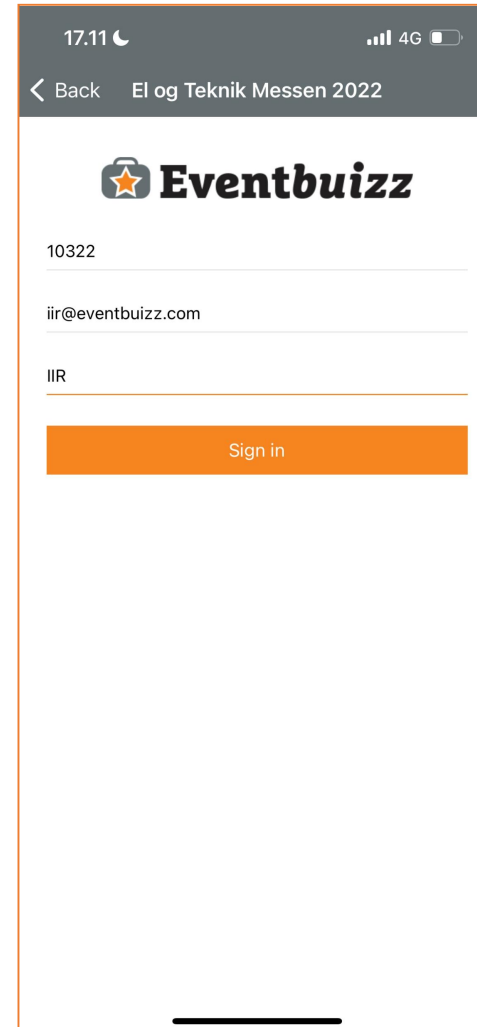# 8. Logging in

Enter your email.

Initials are not mandatory.

Then click Sign in.

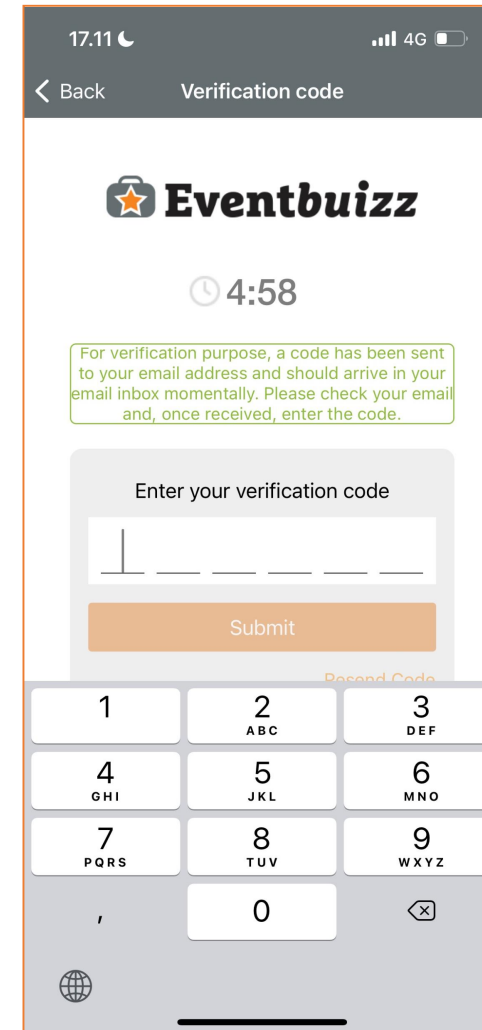A verification code will then be sent to the email.

9. Verification

Enter the verification code that was sent to your email.

10. Select profile
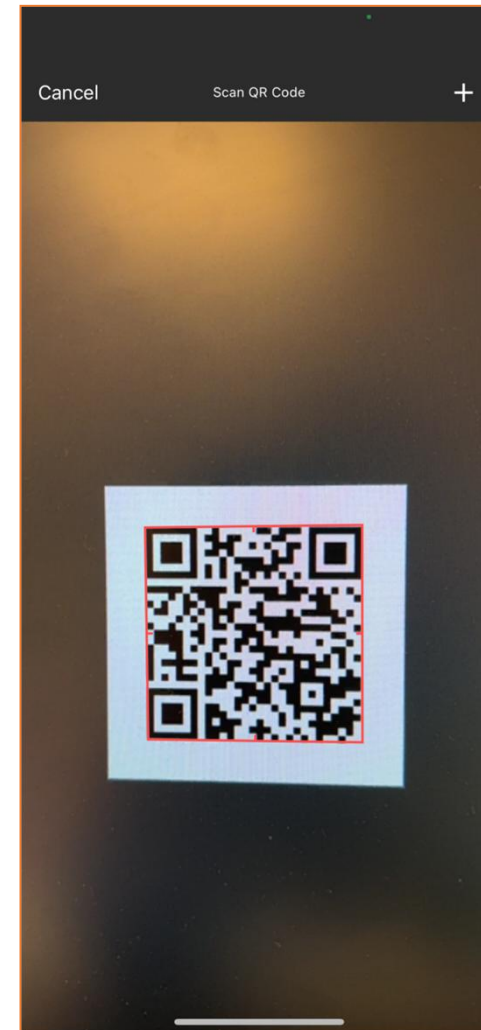
Select the event profile you have been assigned to.

11. Access scanner

Click on the Scan lead button to access the scanning section.

12. Scan the QR-code

Use this section to scan the QR-codes on a lead.

13. Lead profile

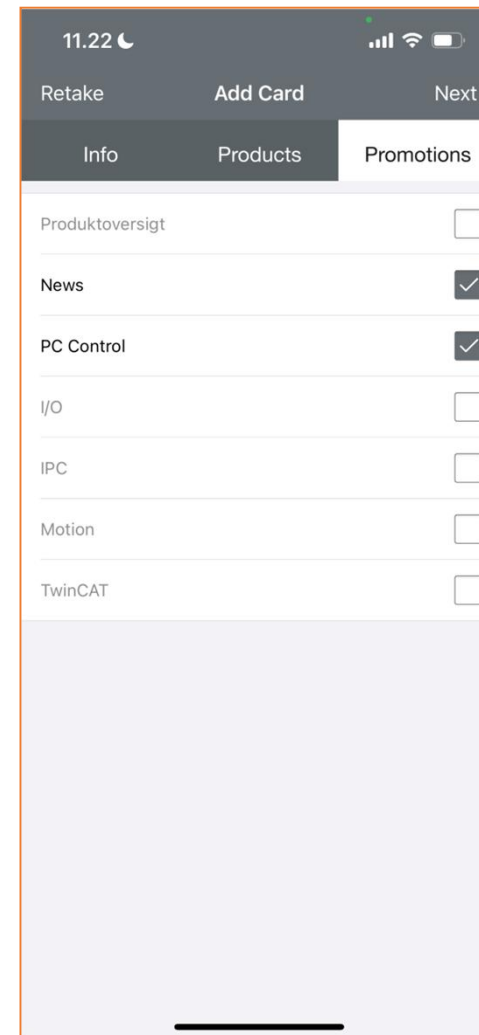Fill in the relevant information regarding the scanned lead.

14. Products

Select the relevant product documents from the list that you want to send to the lead. The lead will receive the product documents via their email.
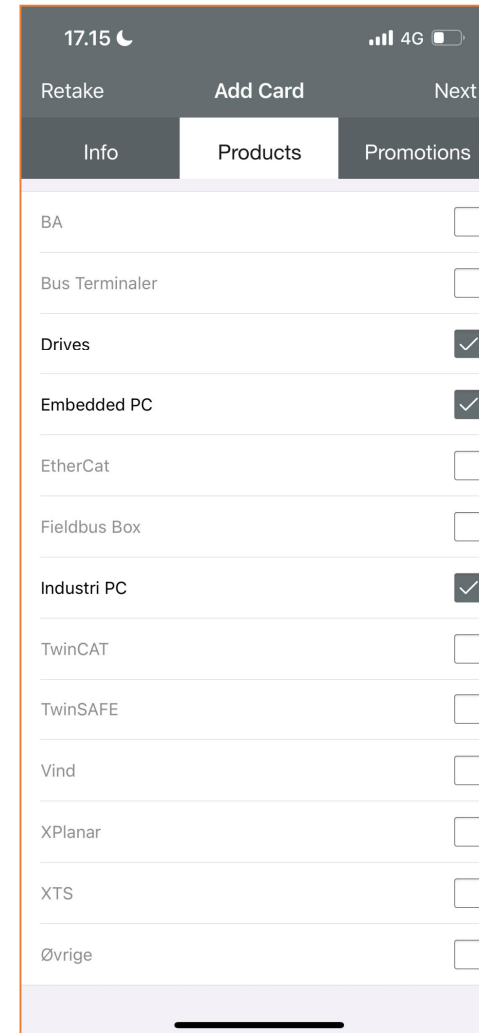
15. Promotions

Select the agreements and subscriptions that the lead has agreed to receive.

16. Forms

A form can be constructed on the Exhibitor Portal which can be filled in using the Leads app.

This can be used to gather additional information on a lead.

17. Save lead

Have the lead sign the field to finish the capturing process.
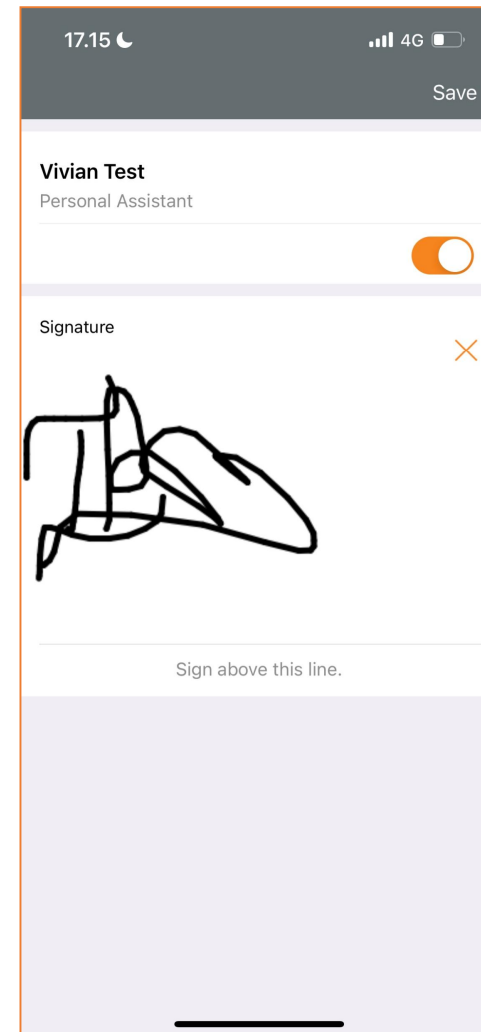
18. Leads list

The lead is now added to your list of leads which can be seen on the Leads page. These leads can also be edited or deleted by swiping left on a lead.