

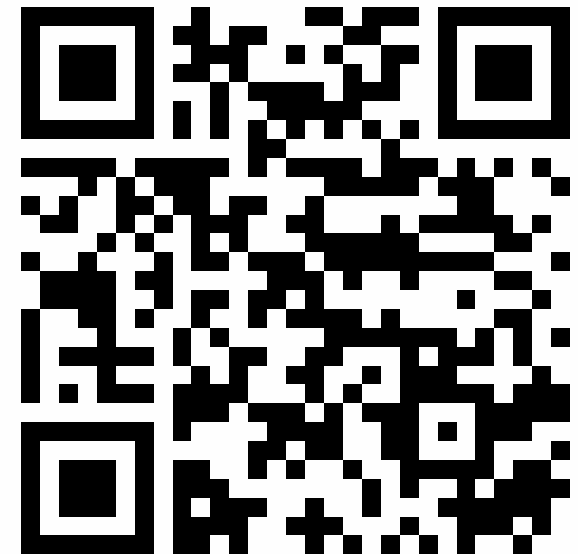
Guide for Leads app (Contact person)

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"

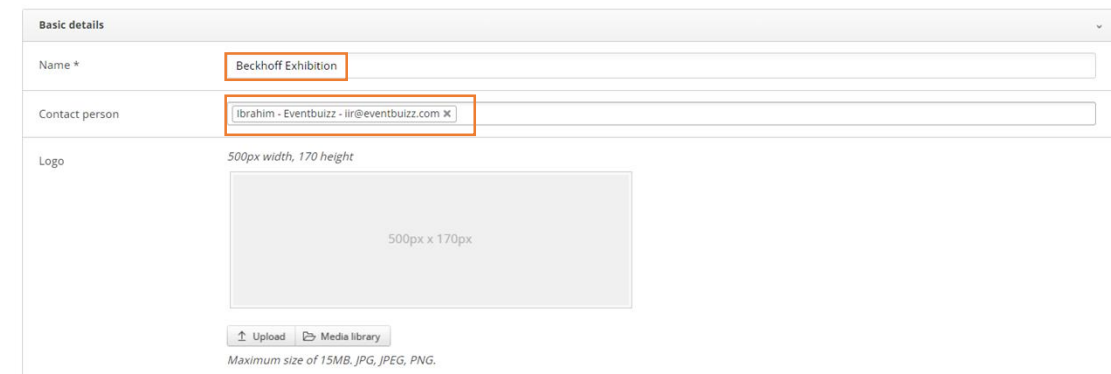
Fill in the of the sponsor/exhibitor and
assign a contact person

Click on Save at the bottom of the page

Exhibitors list



Add exhibitor



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	<input checked="" type="checkbox"/>
Show lead email button	<input checked="" type="checkbox"/>
Enable signature	<input checked="" type="checkbox"/>
Enable auto capture	<input type="checkbox"/>
Product catalogue	<input checked="" type="checkbox"/>
Consent management	<input checked="" type="checkbox"/>
Exhibitors can change categories	<input type="checkbox"/>
Display attendees surveys	<input checked="" type="checkbox"/>

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	<input checked="" type="checkbox"/>
Show lead email button	<input checked="" type="checkbox"/>
Enable signature	<input checked="" type="checkbox"/>
Enable auto capture	<input type="checkbox"/>
Product catalogue	<input checked="" type="checkbox"/>
Consent management	<input checked="" type="checkbox"/>
Exhibitors can change categories	<input type="checkbox"/>
Display attendees surveys	<input checked="" type="checkbox"/>

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	<input checked="" type="checkbox"/>
Show lead email button	<input checked="" type="checkbox"/>
Enable signature	<input checked="" type="checkbox"/>
Enable auto capture	<input type="checkbox"/>
Product catalogue	<input checked="" type="checkbox"/>
Consent management	<input checked="" type="checkbox"/>
Exhibitors can change categories	<input type="checkbox"/>
Display attendees surveys	<input checked="" type="checkbox"/>

6. Leads app setup




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

Disable Allow leads users

Enable Login with authentication

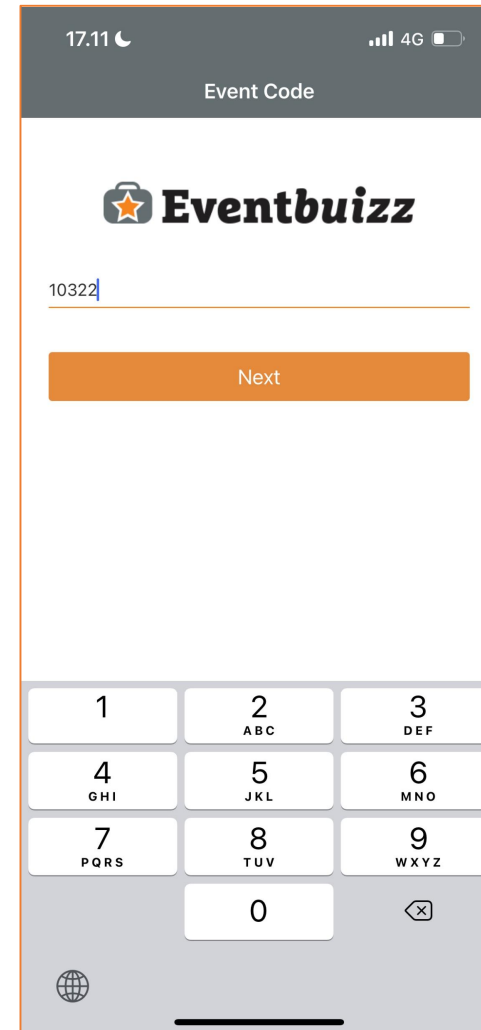
Click Save at the bottom of the page

Leads settings

Display settings	
Verification code	686671 
Allow leads users	<input type="checkbox"/>
Login with authentication code	<input checked="" type="checkbox"/>
Signup with organizer approval	<input type="checkbox"/>
Allow business card	<input type="checkbox"/>
Receive lead email on save	<input checked="" type="checkbox"/>
Show lead email button	<input type="checkbox"/>
Enable signature	<input checked="" type="checkbox"/>
Enable auto capture	<input type="checkbox"/>
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.



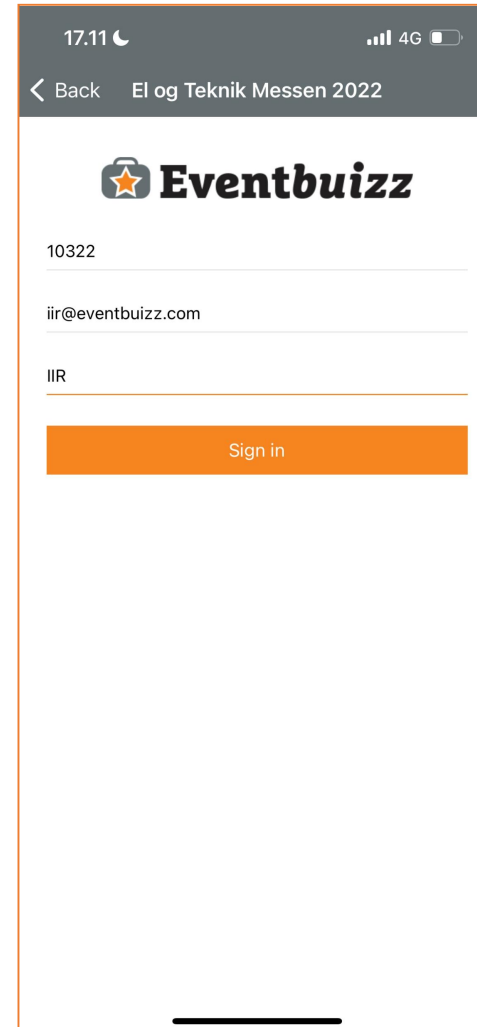
8. Logging in

Enter your email.

Initials are not mandatory.

Then click Sign in.

A verification code will then be sent to the email.

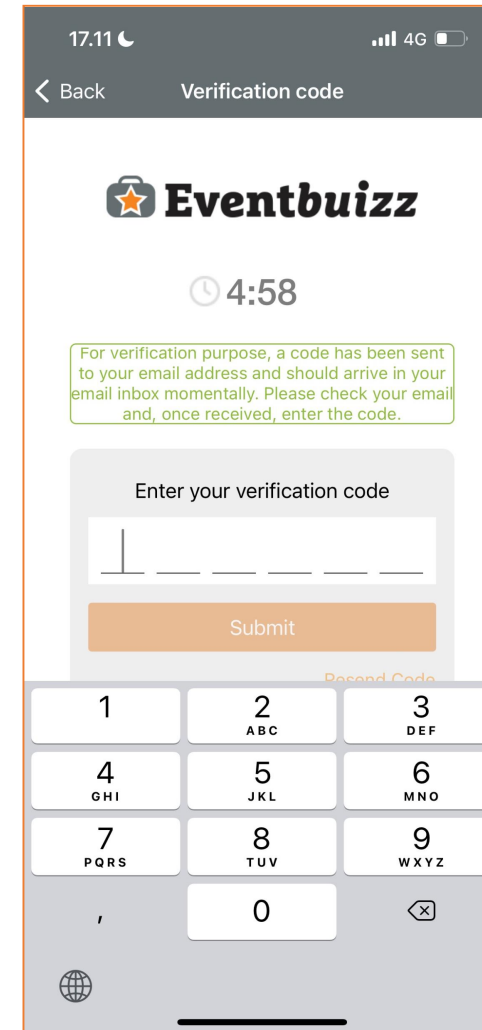


The screenshot shows the login interface of the Eventbuizz mobile app. At the top, the status bar displays the time 17:11, signal strength, 4G connectivity, and battery level. Below the status bar is a dark grey navigation bar with a back arrow and the text "El og Teknik Messen 2022". The main content area features the Eventbuizz logo (a star in a briefcase) and the text "Eventbuizz". There are three input fields: the first contains the number "10322", the second contains the email address "iir@eventbuizz.com", and the third contains the initials "IIR". Below the input fields is a prominent orange "Sign in" button. The bottom of the screen shows a black home indicator bar.



9. Verification

Enter the verification code that was sent to your email.



10. Select profile

Select the event profile you have been assigned to.



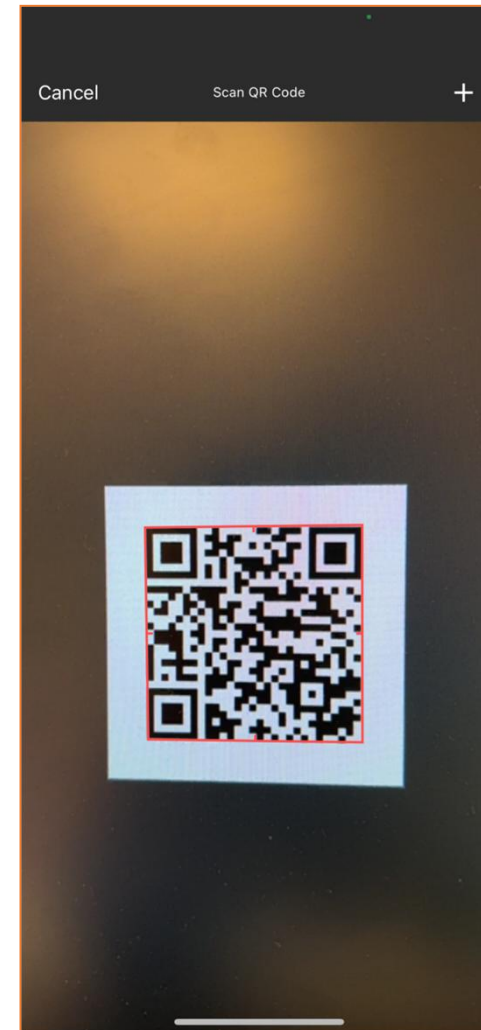
11. Access scanner

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.

17.14 4G

Retake Add Card Next

Info Products Promotions

Rating ★★★★★

Notes

First name Vivian

Last name Test

Mobile

Work tel

Work email iir@eventbuizz.com

Website

Company

Department

12.11

Retake Add Card Next

Info Products Promotions

Company

Department

Job title Personal Assistant

Industry

Street 1

Street 2

Work City State

Post code

Country

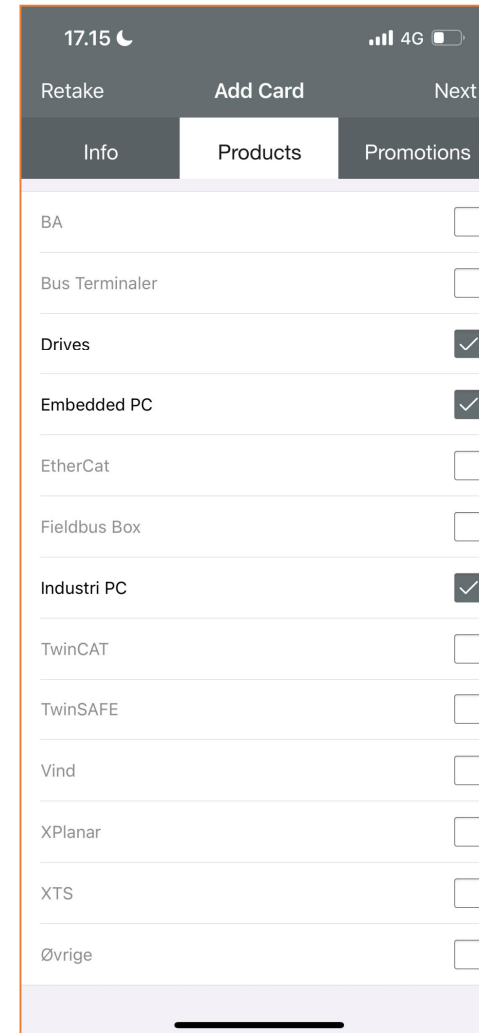
Upload Photo
Upload picture from gallery .png .jpg less the 2 mb

Take a Photo
Capture from your camera



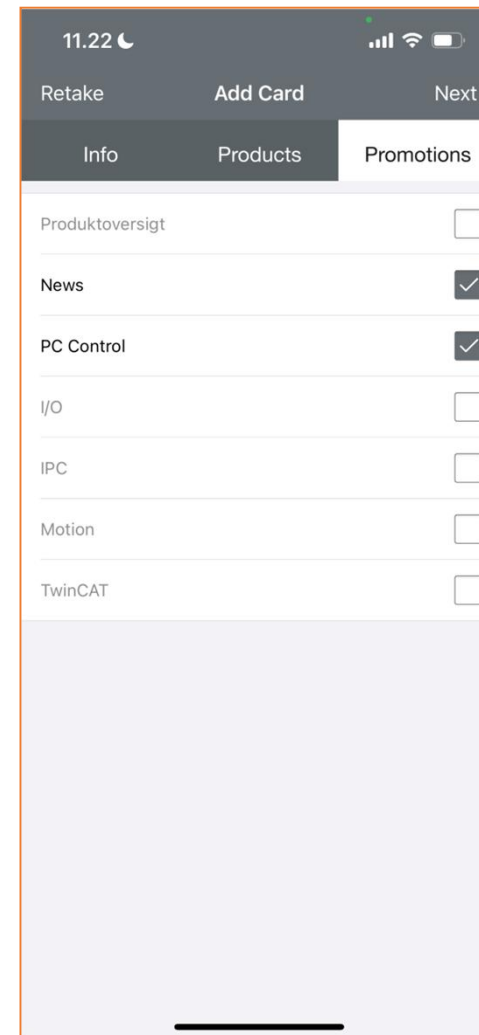
14. Products

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.



14.10

← Add Lead Next

Info Products Promotion Survey

Firma
Answer

Navn
Answer

Adresse
Answer

Postnr. By
Answer

Telefon
Answer

Mail adresse

14.11

← Add Lead Next

Info Products Promotion Survey

Init.
Answer

Messe
Answer

Dato
[Calendar icon]

Beckhoff Interesse

- BA
- Bus Terminaler
- Drives
- Embedded PC
- EtherCAT
- Fieldbus Box
- Industri PC
- TwinCAT
- TwinSAFE
- Vind
- XPlanner
- XTS
- Øvrige

Please enter comments

Applikation
Answer

14.11

← Add Lead Next

Info Products Promotion Survey

Beckhoff Interesse

- BA
- Bus Terminaler
- Drives
- Embedded PC
- EtherCAT
- Fieldbus Box
- Industri PC
- TwinCAT
- TwinSAFE
- Vind
- XPlanner
- XTS
- Øvrige

Please enter comments

Applikation
Answer

Aktivitet
Answer

14.16

← Add Lead Next

Info Products Promotion Survey

Beckhoff Interesse

- EtherCAT
- Fieldbus Box
- Industri PC
- TwinCAT
- TwinSAFE
- Vind
- XPlanner
- XTS
- Øvrige

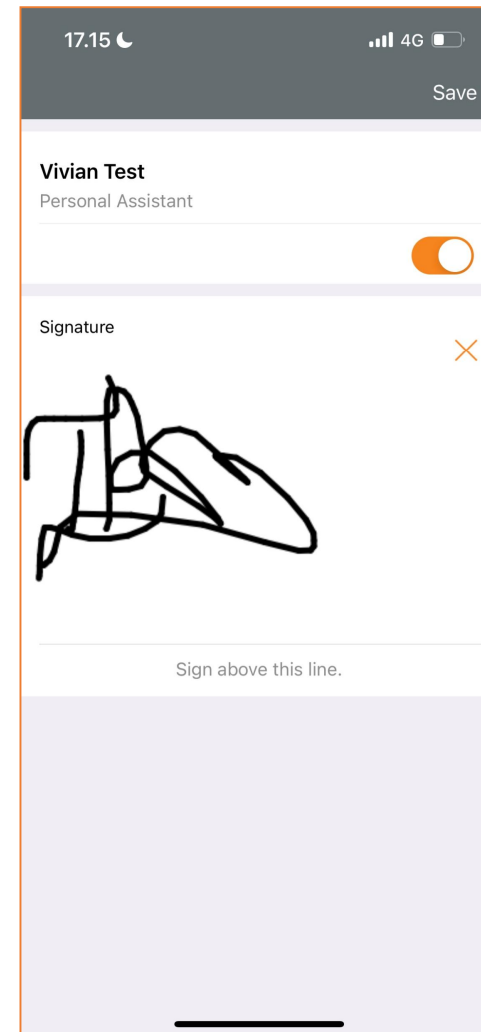
Please enter comments

Applikation
Answer

Aktivitet
Answer

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.

