ExpoBadge Mobile App User Guide

ExpoLeads Mobile is an application that can be used to scan, qualify and survey attendees at events and trade shows using smart phones or tablets. The mobile app is compatible with iPhone, iPad 3 & 4, and most Android devices. **The device must have a rear-facing camera with <u>autofocus</u> in order to scan the barcode.**

Installation and Setup

 You must first download and install the application from the appropriate app store. You can search 'ExpoLeads Mobile' on either the Apple App Store or on the Google Play Store to download the app.

Once installed, you will need your *activation code*, which is emailed to you *after* placing your order.

After you have located this, run the application and select the button at the top right of the screen; this will bring you to the screen where you can enter the activation code:
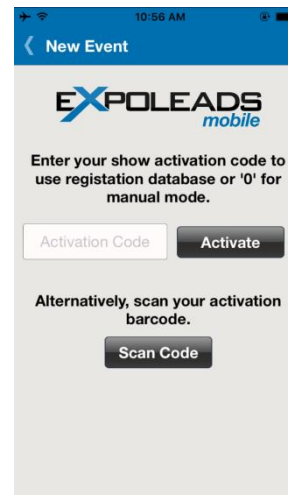
Once activated, the app will try to download a copy of the show information and database. This should only take a few seconds.

You will be asked for your full name, and phone number. This information is used to help identify scans by specific users (when more than one license is being used) as well as to provide service. It is not shared with anyone.

If you need to change any of this profile information later, you can do so from the show settings screen.
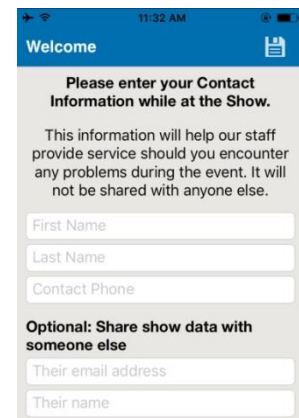
Using the ExpoBadge Mobile App

Lead capture is quick and easy, simply push 'Scan Badge" and the rear facing camera will open. Center the barcode in the middle of the screen to retrieve the lead.

The device must have a rear-facing camera with <u>autofocus</u> in order to scan the barcode.
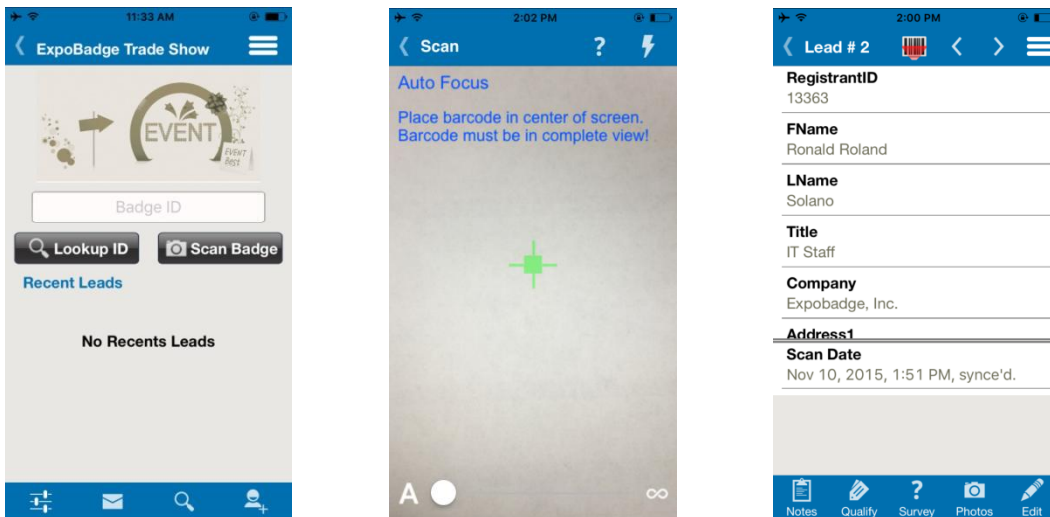
To capture another lead, just go back to the scan screen using the 'Back' button (on Android devices) or the 'back to show' button in the title bar (on iOS devices). You can also push to quickly switch to the scanning screen.

If a lead shows 'no profile data available' after scanning or entering the ID number, the lead detail has not yet been uploaded to the ExpoBadge system. The data will become available once the database has been updated by show management.

After scanning the lead, you may click on the bottom bar to enter notes, select qualifiers, take a survey, take a photo and edit the lead.

Qualifying Leads

The most important part of the lead capture process is being able to quickly and accurately qualify leads.

The ExpoBadge Mobile App lets you do this in several ways: entering notes, checking off qualifiers, running a full survey, taking a photo, or editing the lead. You can access these from the lead detail screen by pressing any of the corresponding icons at the bottom of the screen.
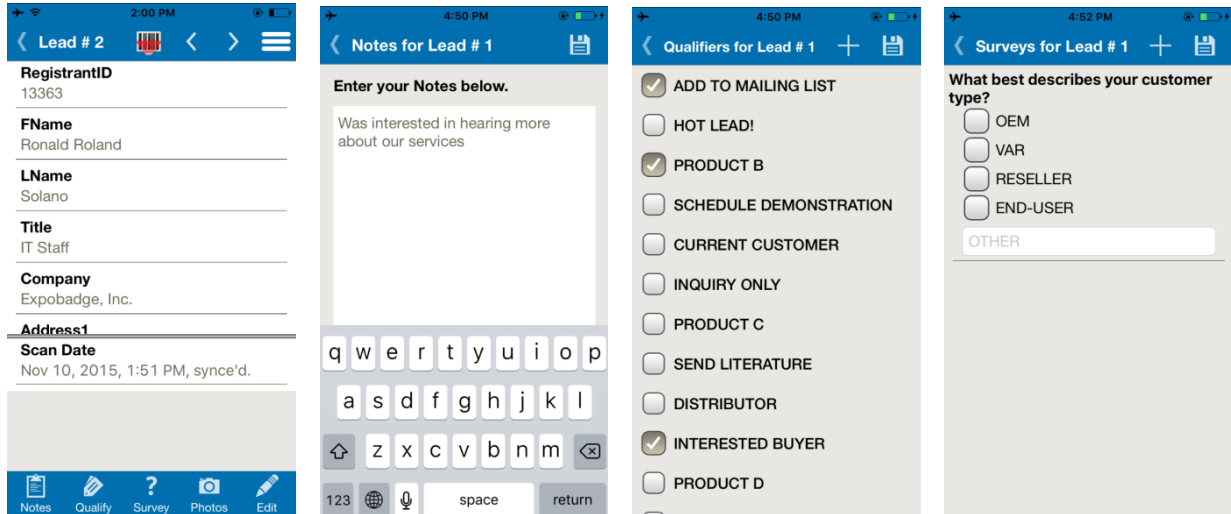

This information is automatically added to the lead and will be available in your leads spreadsheet.

Adding New Qualifiers

Qualifiers can be preloaded before the show, but you can also add or create them yourself.

To add them from the app, go to the show screen, press the '▤' button, then click on 'Edit Qualifiers'. From there you can type new qualifiers, then push + to add it to the list. Sync all other devices to get the updated qualifier list.
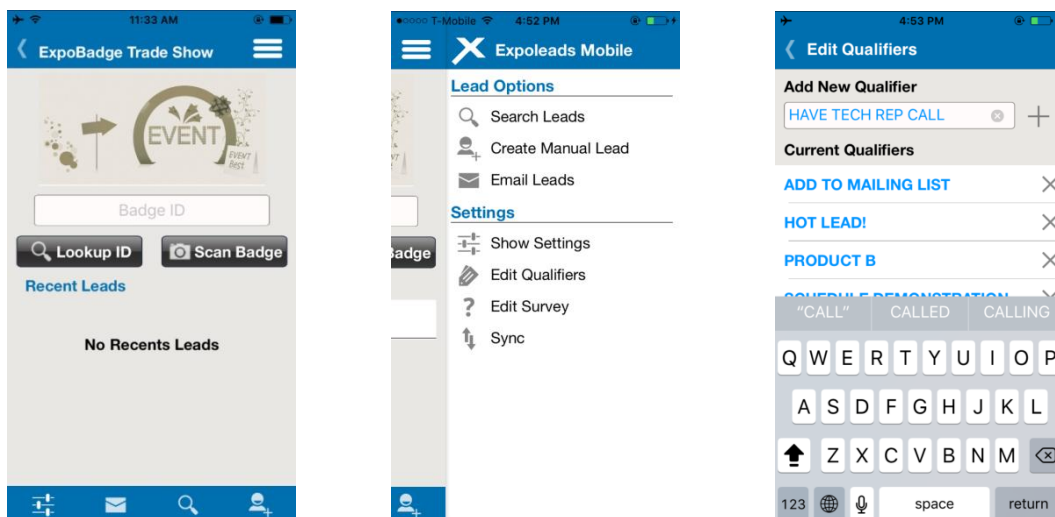
Creating Surveys

Surveys can also be preloaded before the show or entered from the app.

To add them from the app, go to the show screen, press the '▤' button, then click on 'Edit Survey'.

Then push '+' at the top right to create a new survey. Enter the question and answers then push '💾' to save the survey. Sync all other devices to get the updated survey.
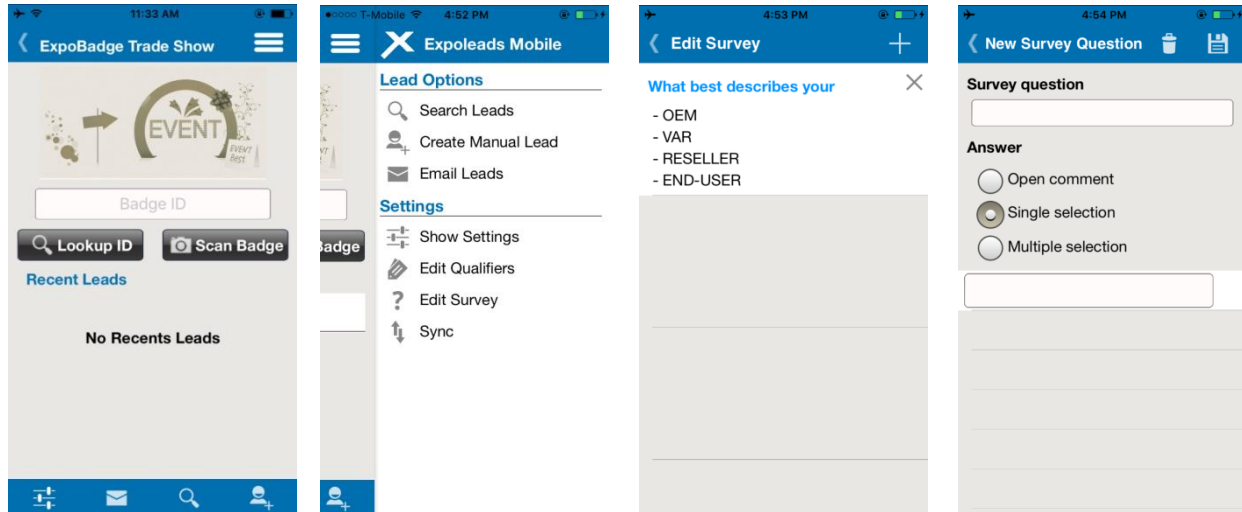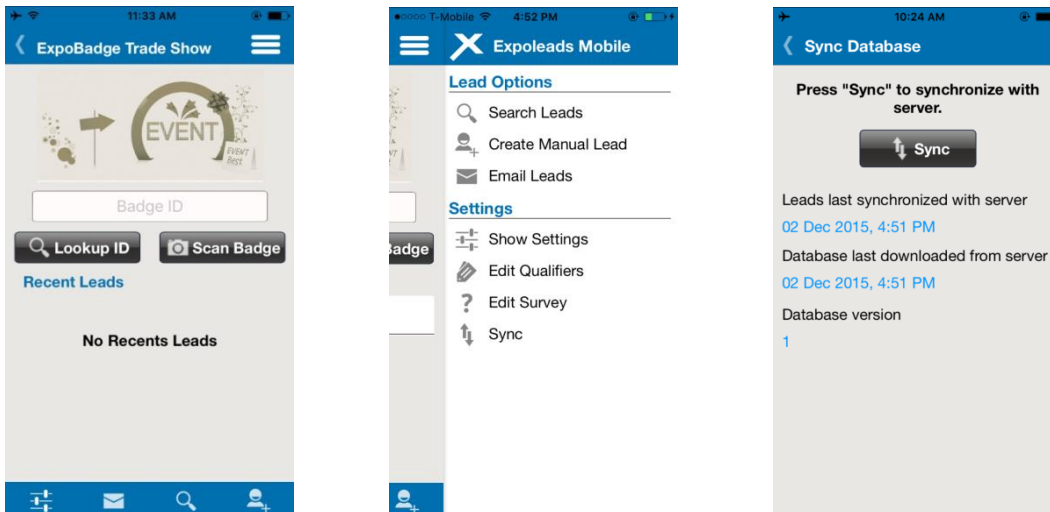

Web-Portal

Your "Welcome to ExpoLeads" email also includes a link and login details to the ExpoBadge Mobile App web-portal. The portal allows you to see all the data scanned from all of the devices used under the same registration code. It also allows you to download a copy and to view your day-to-day performance.
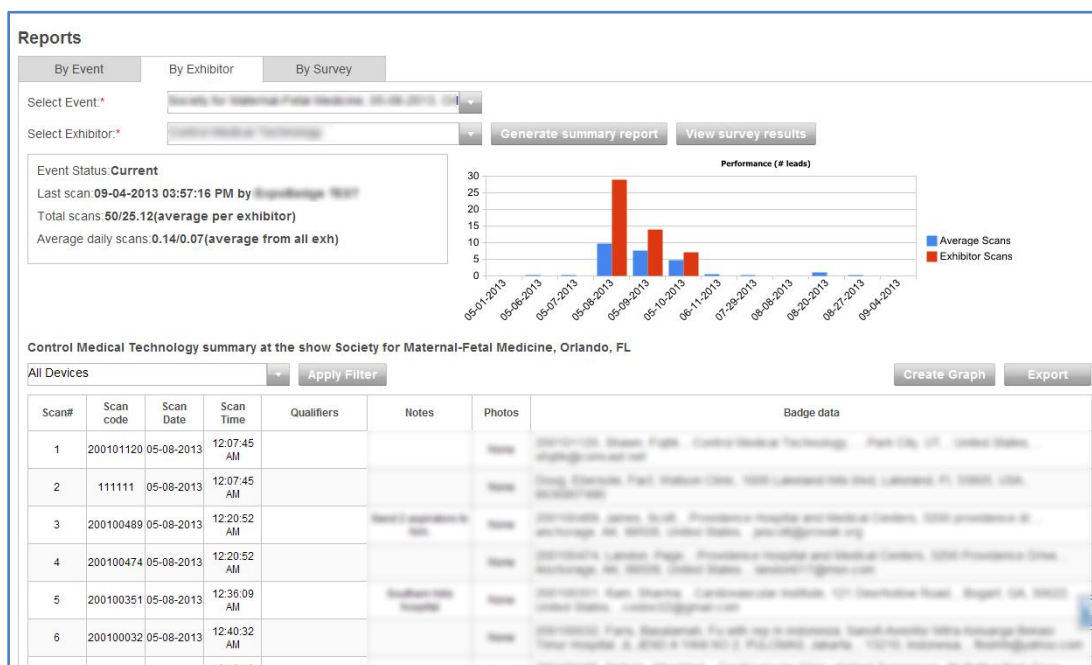
**Advanced Features: Syncing, Off-line Mode and Follow-up**

Syncing

The ExpoBadge Mobile App automatically checks in with the our server whenever you scan or update a lead. However, it also keeps a copy of the data internally for when the data connection is not available.

To sync a device, push ' ' to open the setting tab, click 'Sync' to open the next screen then push the button to synchronize all information with the server.


Offline Mode

If the data connection is present but unreliable, syncing may become slow. In these cases, you can switch to offline mode. Your data will not be available on the web-portal until you manually invoke the Sync function described earlier. Click the ' ' button at the main screen, push Offline Mode, then toggle the button to ON.

*Note that this feature is not used under normal circumstances. It is meant for when a data connection is present but unstable.
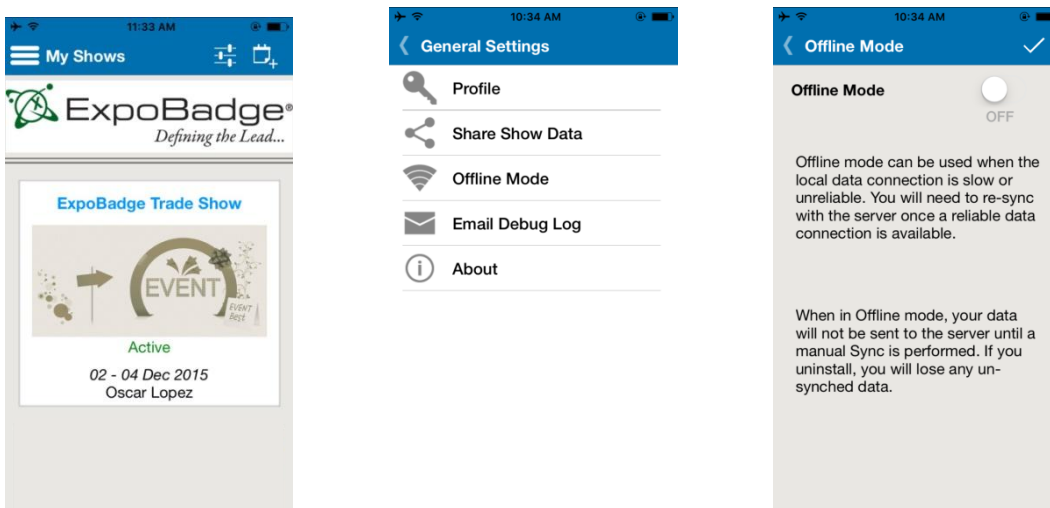
Emailing Your Leads to Someone

If you want to send a copy of the leads to yourself or someone else, you can do that directly from the application. Just click the '✉' button on the show screen. Type in the recipient's email address with a small message then click 'Send'. To go back, push the 'Cancel' button.
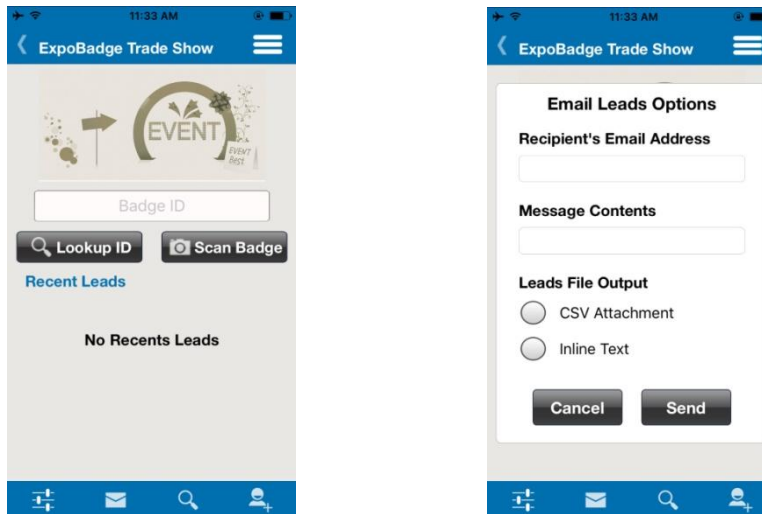
Follow-up Features

ExpoLeads Mobile has two features that make following up on a lead easier.

These are **sending an email to a prospect** directly from the lead detail screen and **adding a prospect to your contacts** list. Both of these are available after making a scan. Click '☰' after scanning a lead to show more options. Under Lead Options you can manually search for leads, send an SMS, send an email, call, or add them to your devices contact list.