

## 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. It is compatible with most Apple and Android devices.

### Installation and Setup

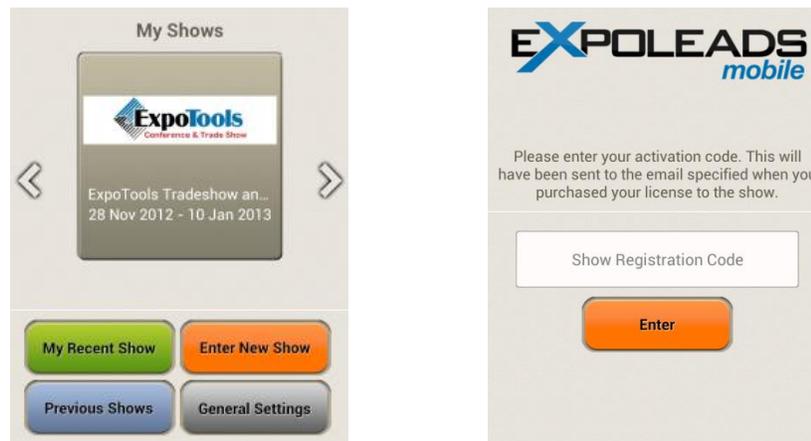
---

You must first download and install the application from the appropriate app store. You can search for 'ExpoLeads Mobile' on either store. Alternatively, you can use one of the links below:

For Apple/iOS devices: <https://itunes.apple.com/us/app/expoleads-mobile/id583329571?mt=8/>

For Android devices: <https://play.google.com/store/apps/details?id=com.expotools>

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 'Enter New Show'; 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 name, booth number and aisle 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.

Please enter your Contact Information while at the show.  
This information will help our staff provide service should you encounter any problems during the event. It will not be shared with anyone else.

First Name

Last Name

Contact Phone

Aisle  Booth

Optionally share show with this person

Email address

Their name

## Using the ExpoBadge Mobile App

---

Lead capture is quick and easy and can be done in two ways. You can either enter the ID number manually or scan the barcode from the badge. **The device must have a rear-facing camera with autofocus in order to scan the barcode.**

If the service provider at your event has not included a suitable barcode, scanning will not work but you can still capture leads by manually keying in the ID number.



Once captured, ExpoLeads Mobile will display the contact information for that prospect. You can switch between a more or less detailed view using the 'extended view' or 'simple view' button at the top right.

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).

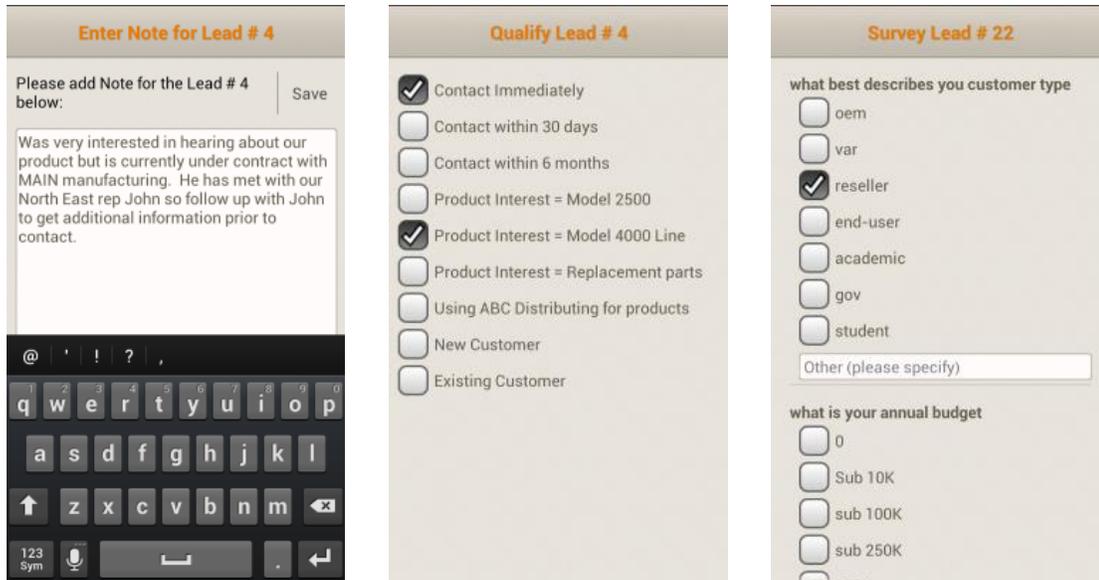
If a lead shows 'no profile data available' after scanning or entering the ID number, the lead detail has not yet been uploaded to the ExpoBadge system. The data will become available once the database has been updated by show management.

## 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 three ways: entering notes, checking off qualifiers, or running a full survey. You can access these from the lead detail screen by pressing any of the three corresponding icons.



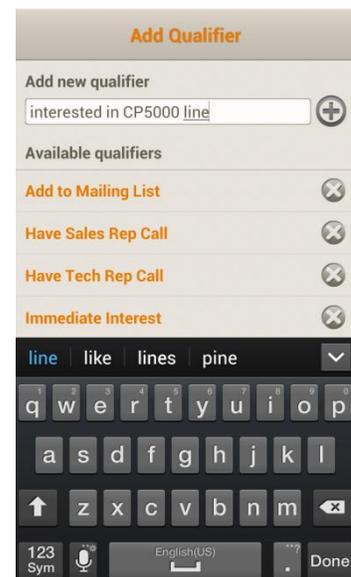
This information is automatically added to the lead and will be available in your leads spreadsheet.

## 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 qualifier screen, press the 'Menu' button (on Android devices this is the physical menu button, on iOS it is an on-screen button). From there, select add qualifier.



## Creating Surveys

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

On Android devices, press the menu button from the surveying page and choose 'Add New Survey Question'. For iOS devices, this button is available directly from the surveying screen.

## 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.

**Survey Lead # 16**

What best describes your company?

End-user

Reseller

VAR

Distributor

Gov

Academic

Other (please specify)

---

What is your annual budget?

< \$10K

\$10K to \$50K

### Reports

By Event | By Exhibitor | **By Survey**

Select Event: \*

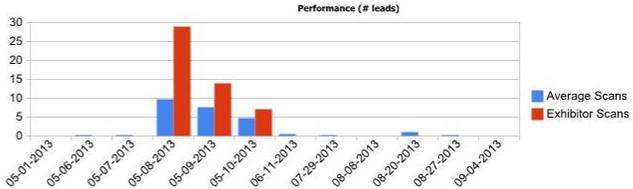
Select Exhibitor: \*

Event Status: **Current**

Last scan: **09-04-2013 03:57:16 PM** by ExpoBadge 937

Total scans: **50/25.12**(average per exhibitor)

Average daily scans: **0.14/0.07**(average from all exh)



Control Medical Technology summary at the show Society for Maternal-Fetal Medicine, Orlando, FL

All Devices

Scan#	Scan code	Scan Date	Scan Time	Qualifiers	Notes	Photos	Badge data
1	200101120	05-08-2013	12:07:45 AM				Control Medical Technology, Park City, UT, United States, info@controlmed.com
2	111111	05-08-2013	12:07:45 AM				Drug, Control Med, Park City, UT, 800-368-8888 and 800-368-8888, 111111, USA, info@controlmed.com
3	200100489	05-08-2013	12:20:52 AM		Healthcare		200100489 James Scott, Providence Hospital and Medical Centers, 500 Providence Dr, Anchorage AK, 99503, United States, james@providence.org
4	200100474	05-08-2013	12:20:52 AM				200100474 Landon Page, Providence Hospital and Medical Centers, 500 Providence Drive, Anchorage AK, 99503, United States, landon@providence.org
5	200100351	05-08-2013	12:36:09 AM		Healthcare		200100351 Ryan Starnes, Cardiovascular Institute, 121 Sherburne Road, Sugar Hill, GA, 30088, United States, ryan@cvinstitute.com
6	200100032	05-08-2013	12:40:32 AM				200100032 Tracy Steinhilber, P.O. Box 10000, Providence Hospital, 10000 Providence Blvd, Anchorage AK, 99503, United States, P.O. Box 10000, Anchorage, AK, 99503, United States, tracy@providence.org
			12:42:43				200100032 Tracy Steinhilber, P.O. Box 10000, Providence Hospital, 10000 Providence Blvd, Anchorage AK, 99503, United States, P.O. Box 10000, Anchorage, AK, 99503, United States, tracy@providence.org

## Advanced Features: Syncing, Off-line Mode and Follow-up

Advanced features are available from the scan screen menu. This can be accessed directly from the on-screen icon for iOS devices, or by pressing the 'menu' button on Android devices.

### 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. Although not usually necessary, you can re-sync both sides manually whenever you wish using the Sync feature.

### 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.

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 choose the Email Leads option from the menu in the scan screen.

### 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 from the Lead Detail screen menu.

