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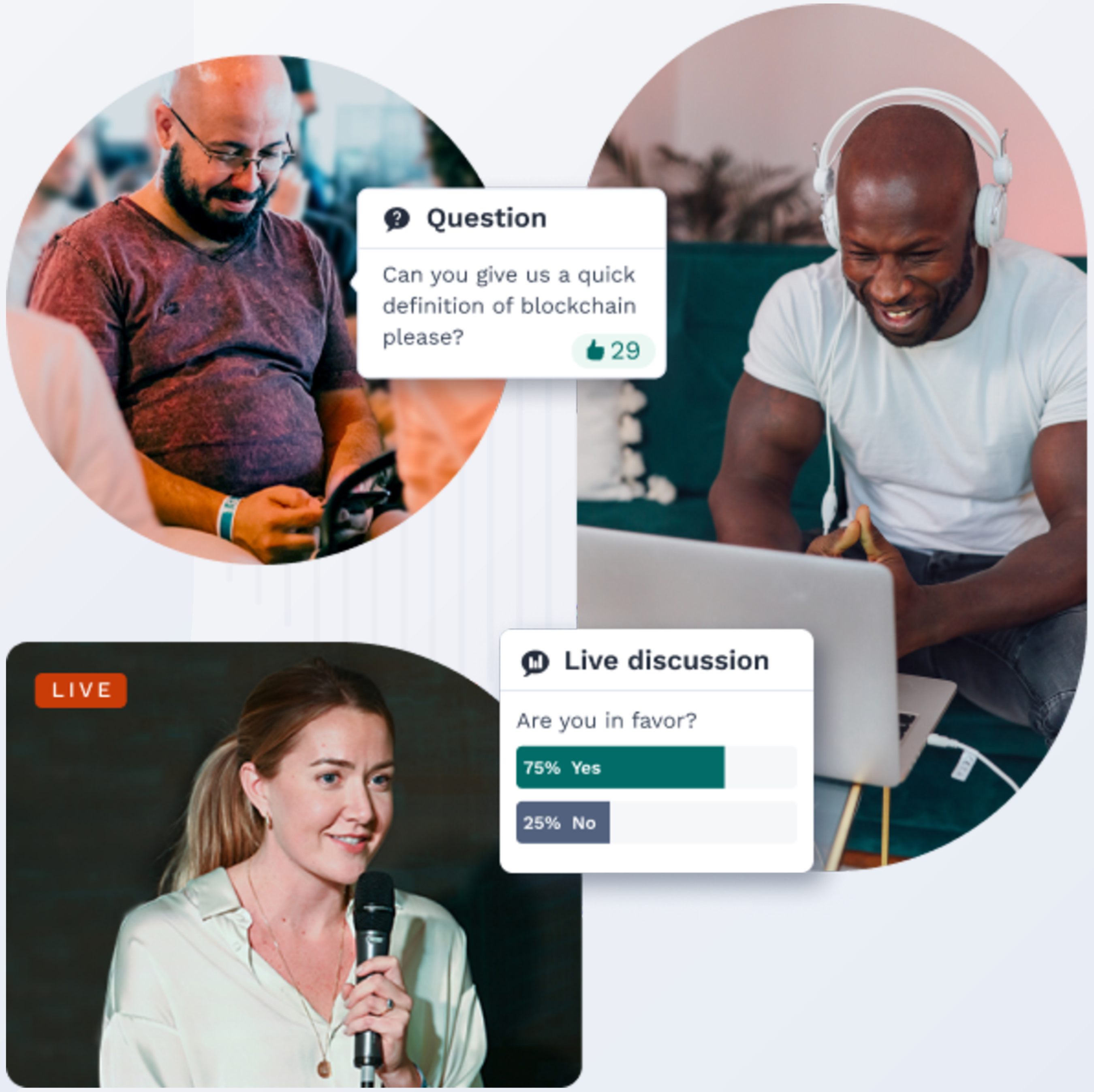
Lead Capture

How to use lead capture



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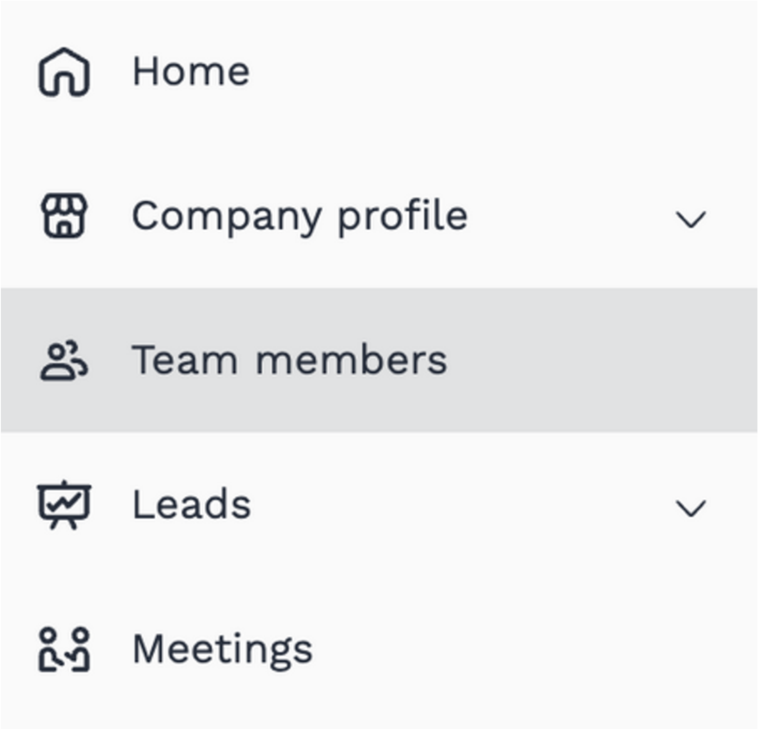
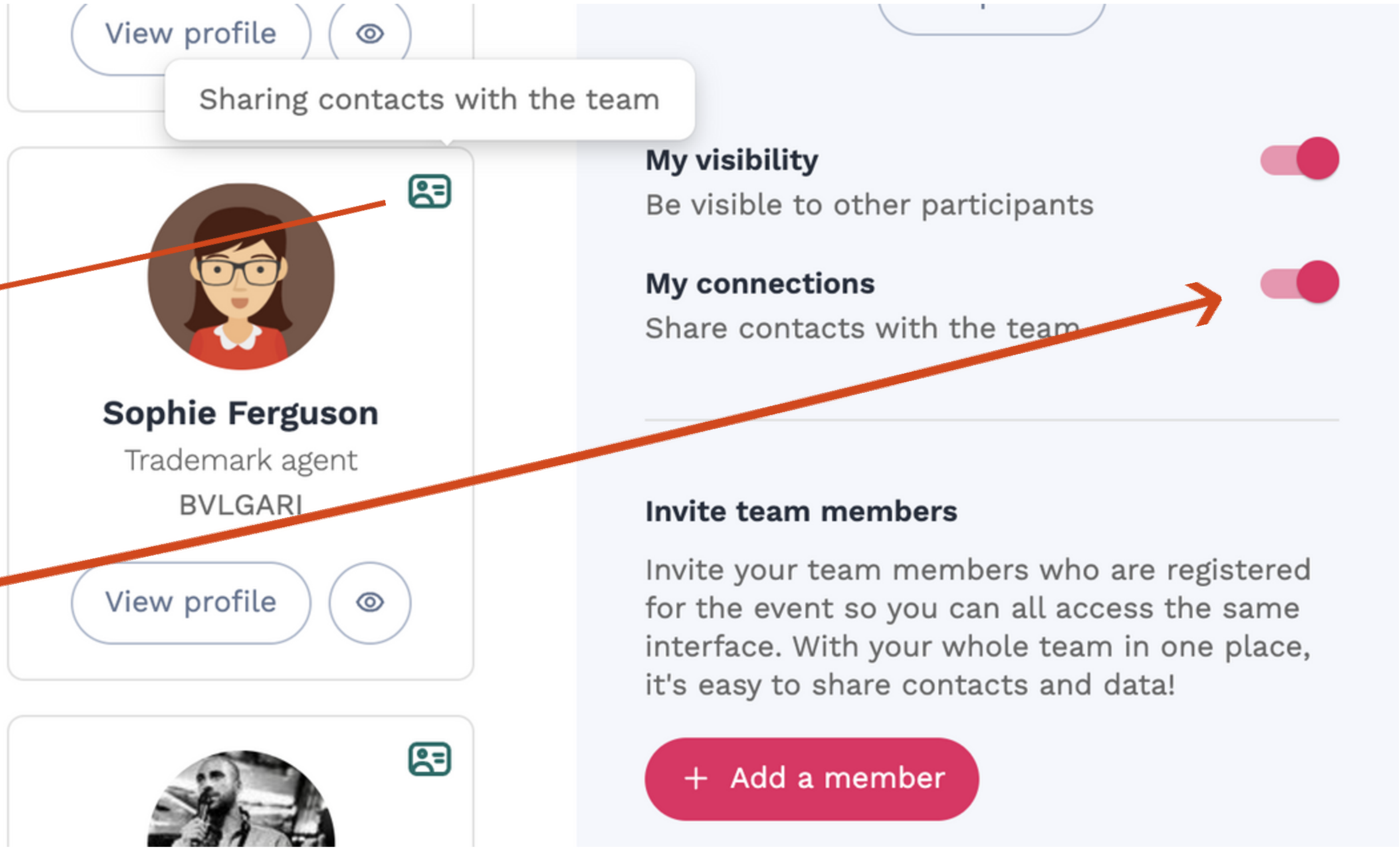
Before lead scanning

Before scanning, **make sure you are a team member of an exhibitor booth**. If you are not, your leads will not land in the team's contact list. Your colleagues who are already team members can add you as a member from **"Team members"** in the **Exhibitor Center** (team.swapcard.com).

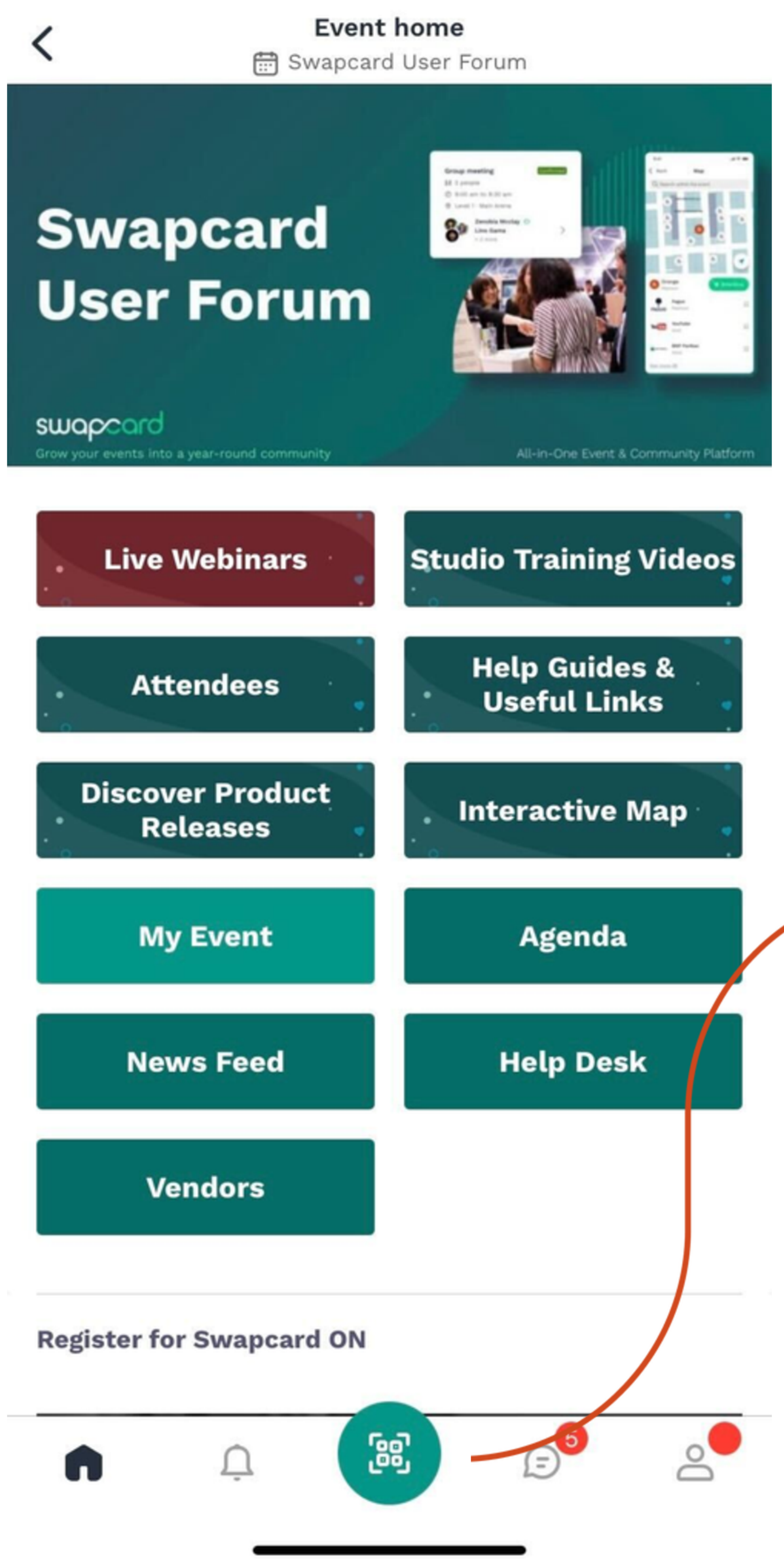


Note: If the add a member option is not there, **contact the event organizer**.

Make sure that **contact sharing is on**. Go to **"Team members"** and hover over the icon in the top right corner to check if they are sharing contacts with the team. **Only the person currently logged in can toggle this on/off**.



How to lead scan?



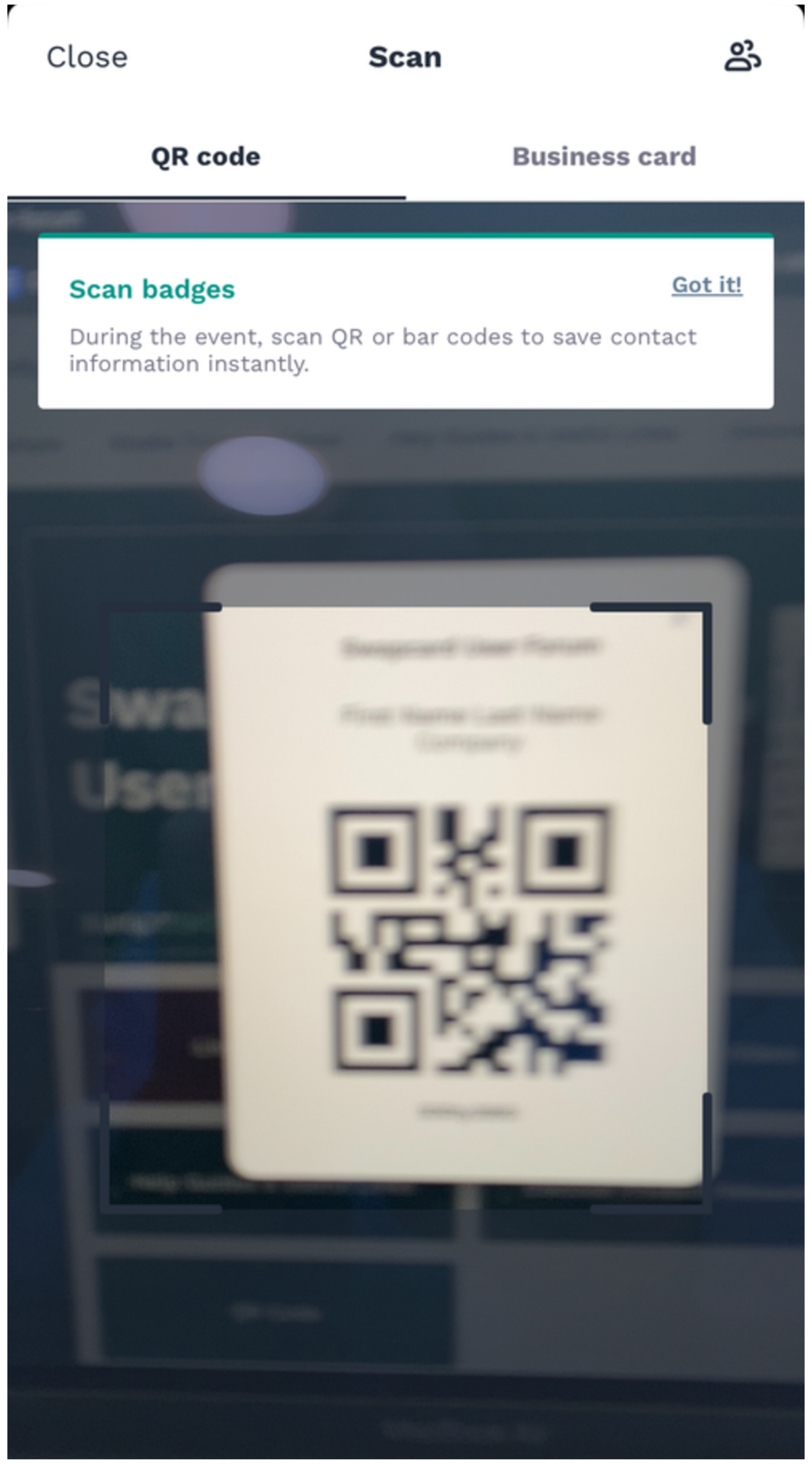
1

Download the Swapcard app for **iOS** or **Android**

Note: the organizer may have their own app you can use instead, usually searchable by event name. If you are unsure about which app to use, contact the event organizer.

2

Login and click the **scan icon on the bottom of the screen.** This opens up a QR code/barcode **scanner**.



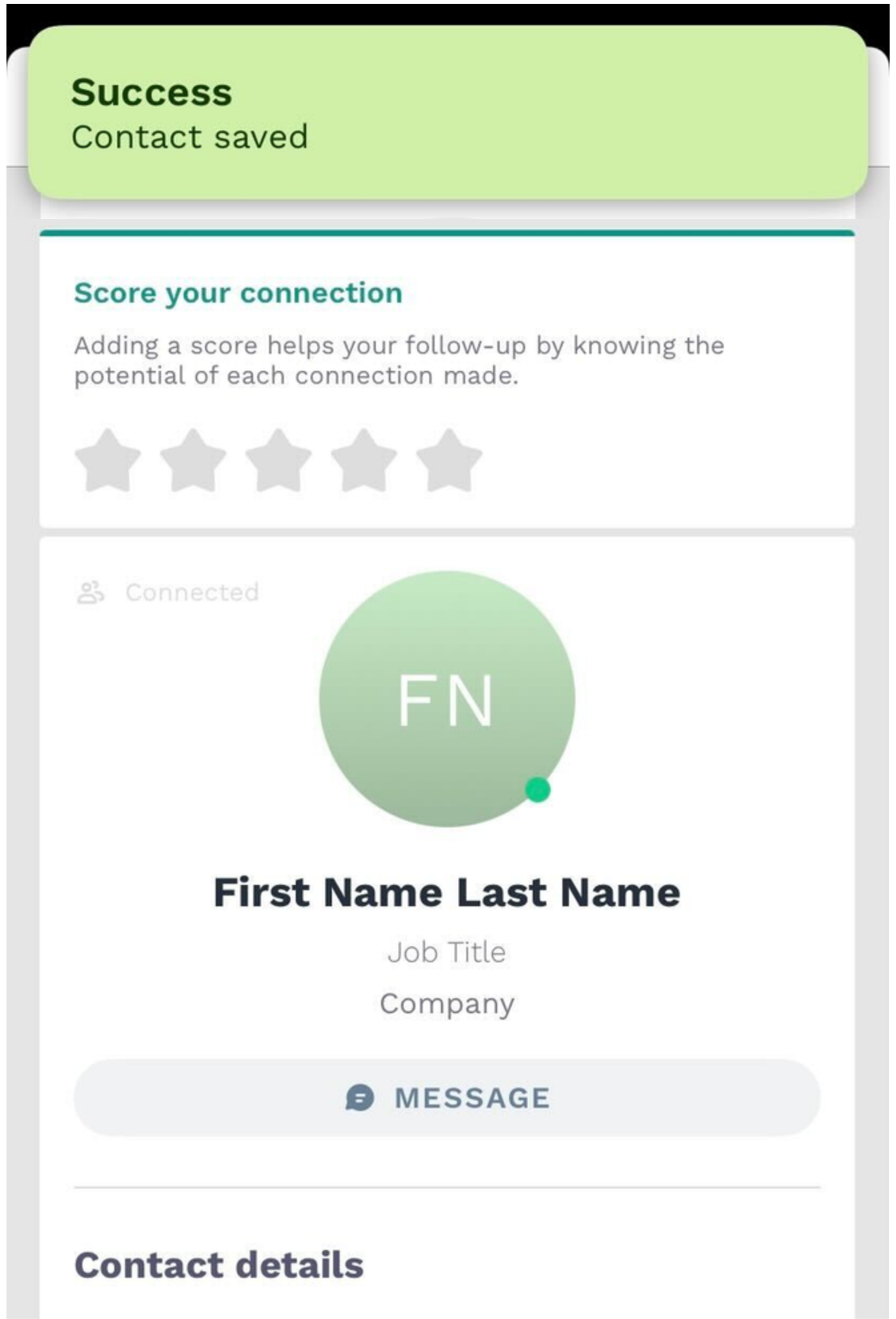
What to lead scan?

There are generally two options, depending on what the organizer decides to do:

1. Scan the QR code or barcode on a printed badge
2. Scan the QR code or barcode from the Swapcard or Event app

Note: Organizers often add a button on the event homepage that attendees can use to open their QR code or barcodes for scanning. This is usually called "**Event Ticket**," "**My Badge**," "**QR code**," or similar.

Options after scanning



1

A pop-up will tell you if the scan was successful. You have the option to score and add notes.

2

Scanning automatically creates a connection between you and the person you scan. They will then land in your own contact list as well as the team’s contact list.

3

You can also export, print, or delete the contact and, if the **Lead Qualification** option has been enabled by the organizers, you can then add more details about this lead.

Leads dashboard and how to export the leads

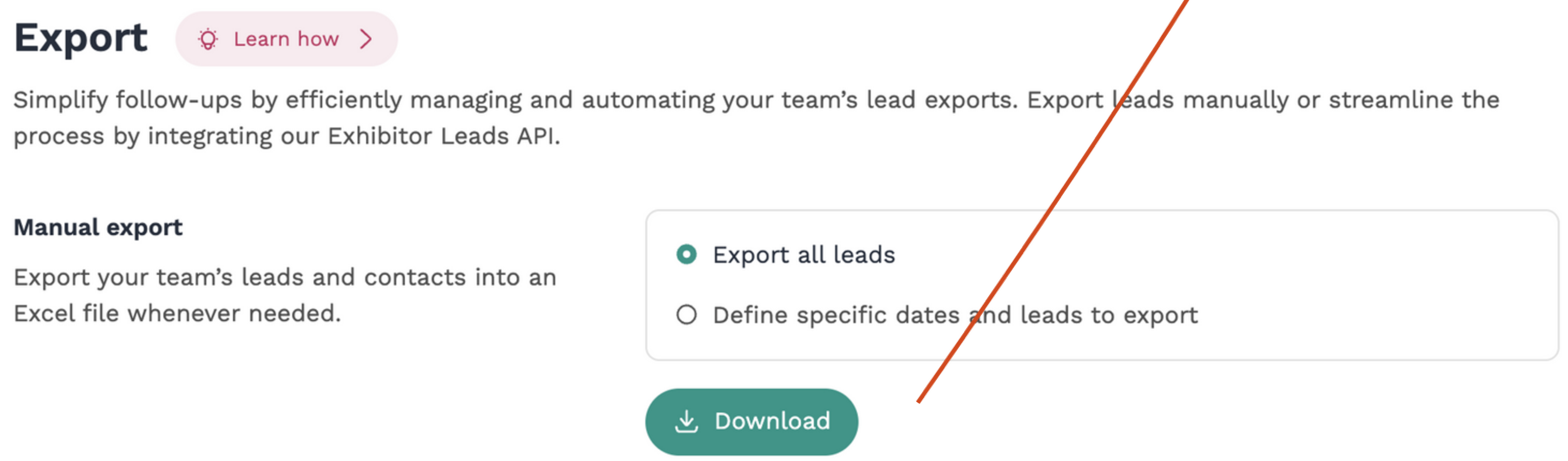
You can easily manage your leads and at the **Leads dashboard**, in the **Exhibitor Center** (team.swapcard.com).
Note: Some features may not be available for your company. Please **confirm with the organizer which ones are available** according to your category of participation.

1

Under Team's Contacts, check some statistics about your company's booth and your team's activity, and view a table with the contacts made by you and your fellow team members.

2

You can easily download your leads from your computer, go to Export to download an Excel list with your leads.



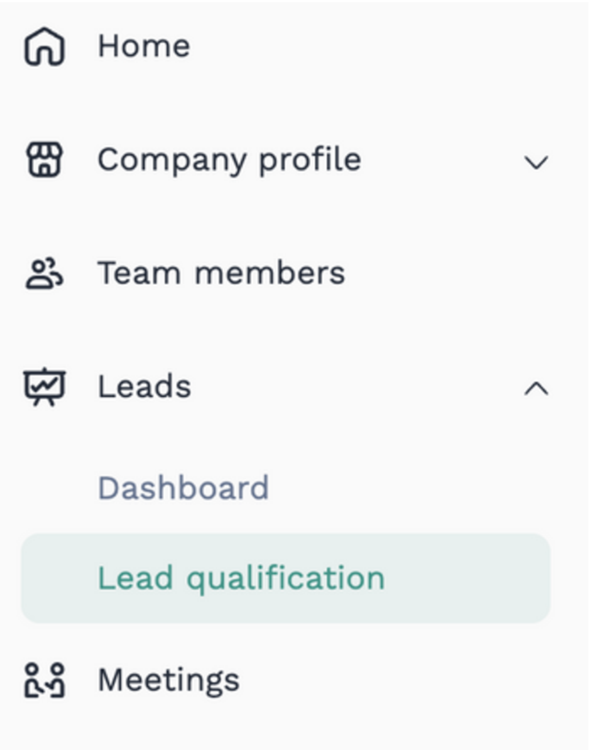
Leads excel export

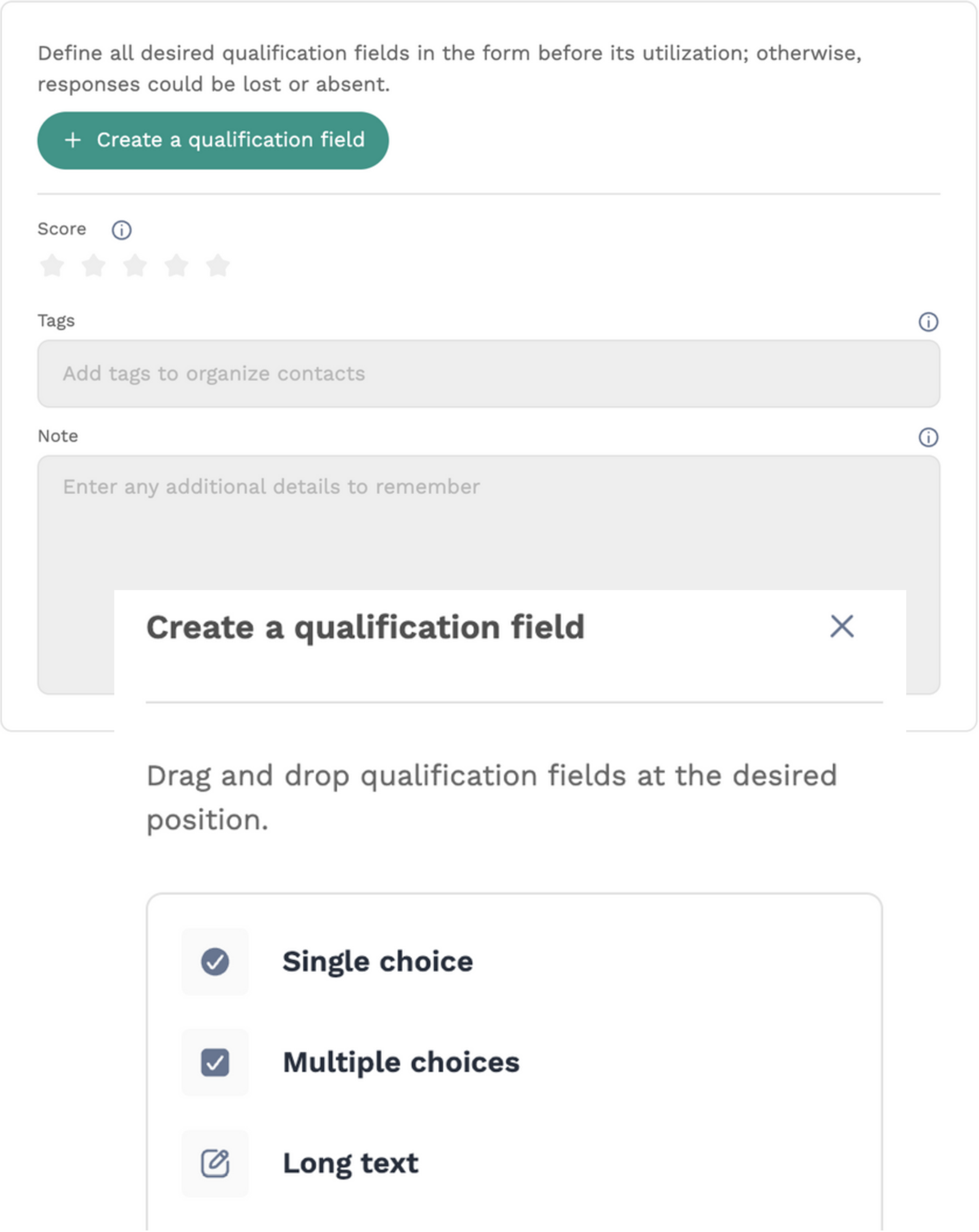
Different tabs with the leads will show up in the exported **Excel file** depending on the permissions/filters available according to your participation in the event:

- **Contacts**: The list of people that connected with exhibitor members.
- **Meeting confirmed**: The list of people who had a meeting with the exhibitor or its members.

Create the Lead Qualification form

1. After accessing the **Exhibitor Center**, go to **Leads** and then **Lead qualification**.
2. Press the **Customize lead qualification** button.
3. Press the **Create a qualification field** button to start adding fields to your qualification form.
4. From the right side panel, drag & drop the type of field you want to create to the form.
5. Press edit icon to rename the field and related option values (if single and multiple choices). You can also reorder your fields and delete them by clicking on the proper icon.



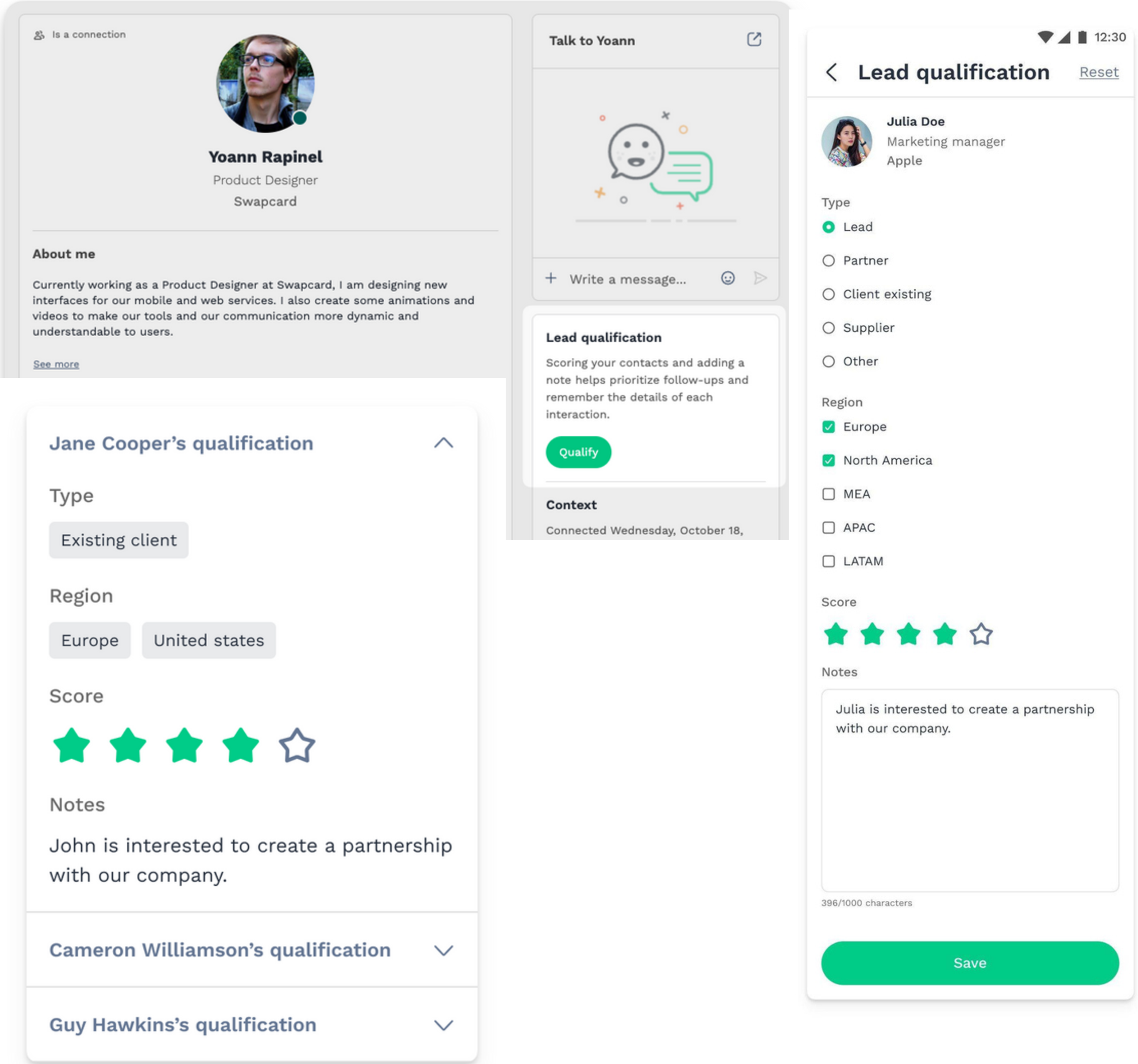


Note: Score is a default qualifier and can't be deleted

Qualify a contact using the Lead Qualification form

Following an accepted connection or meeting request, or after scanning their badge, you can qualify your contact. From **Web or Mobile app**, navigate to the contact page and follow these steps:

1. Locate the Lead Qualification section and press **Qualify**
2. The shared qualification form you created will be accessible and fillable by all team members for each contact they meet at the event
3. You can **view and add details** to a contact already qualified by another team member
4. All team members' qualification responses will be included in the global export of your team's contacts



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Thank you for taking the time to read this presentation.

If needed, you can use our Live Chat and our **support team** will get in touch: help-attendees.swapcard.com

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