



LeadReference

USER GUIDE

How to create and use
lead qualification codes

LeadReference exhibitor lead management system goes beyond just collecting the business card information offered in general lead retrieval systems. LeadReference offers exhibitors an efficient, quick, and easy method to collect and manage leads at events in a way that makes the follow-up a breeze.



Mobile App



Handheld scanner



Lead qualification

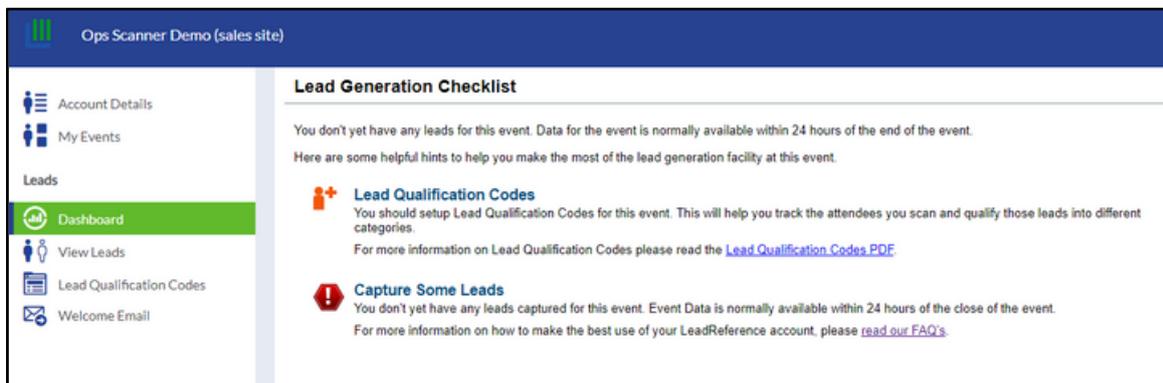
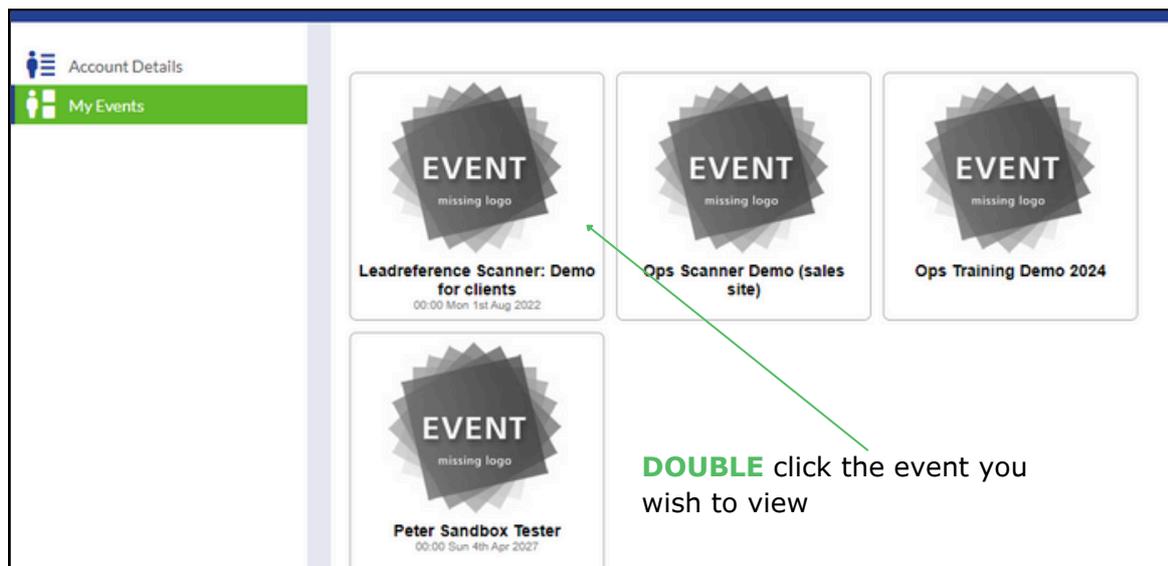
1. Logging In

First, you will need to log into the website using the login details you are issued with via email.

Go to the web page given in your 'lead reference login details' email.

2. Opening your account

When you log in, you will see the events your account is linked to. This could be one event or many – depending on what events you have ordered scanners for.



This is the dashboard for the event.

It shows basic information about what you need to do. After the event has finished and your leads are fully uploaded, the dashboard will show a pie chart of the information captured.

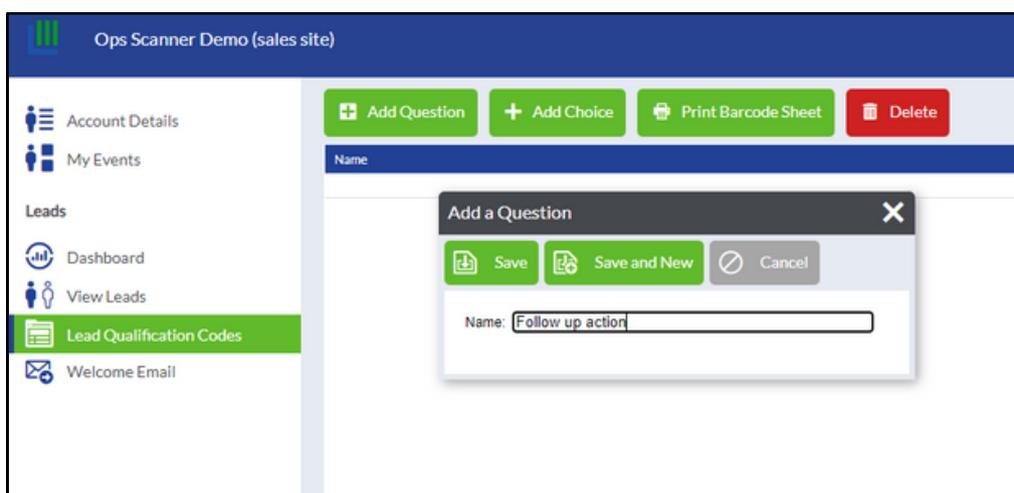
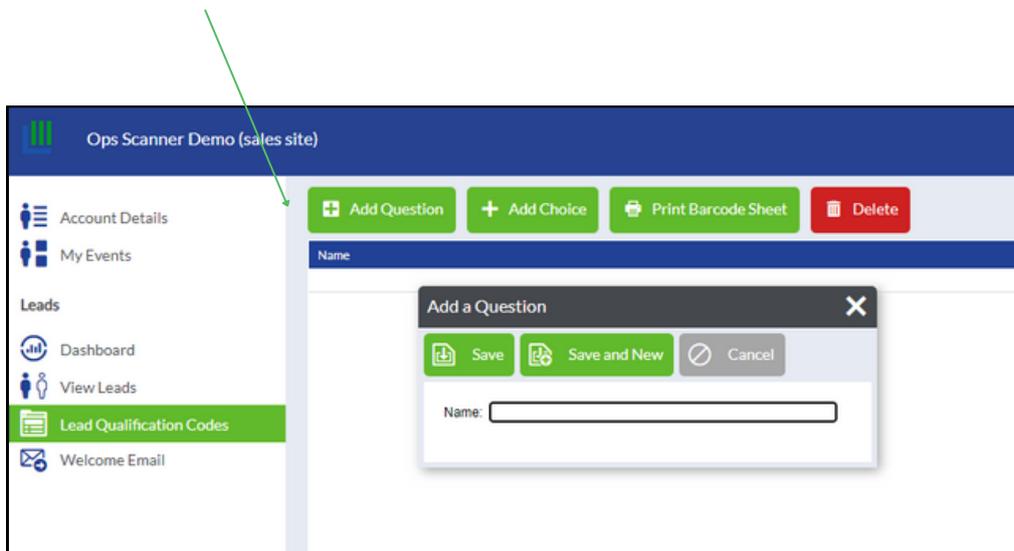
3. Creating your lead qualification codes (barcode sheet)

This is where you set up the barcode sheet for onsite use. The reason for doing this is so that when you scan a delegate at the event you can have the option to make a note against them to help identify what they required at a later date.

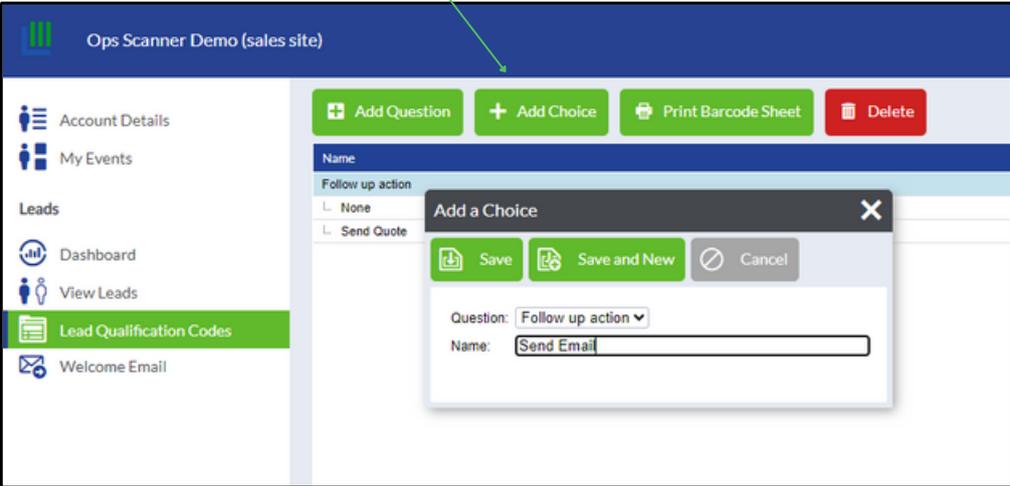
By making this barcode sheet you can scan the barcode appropriate for each delegate, therefore the leads are easier to go through when you're back in the office (e.g. Mrs Smith was interested in product X and wants a brochure sending)

To create leadref codes (barcodes) go to the **'Lead Qualification Codes'** tab.

Click **'Add Question'** – you need to add a question that you can put answers to for example 'Follow up action'.



Then click 'Add Choice' – The choices for this question are what will represent the barcodes. So you want your answers to be 'Send brochure', 'Email', 'Call' etc.



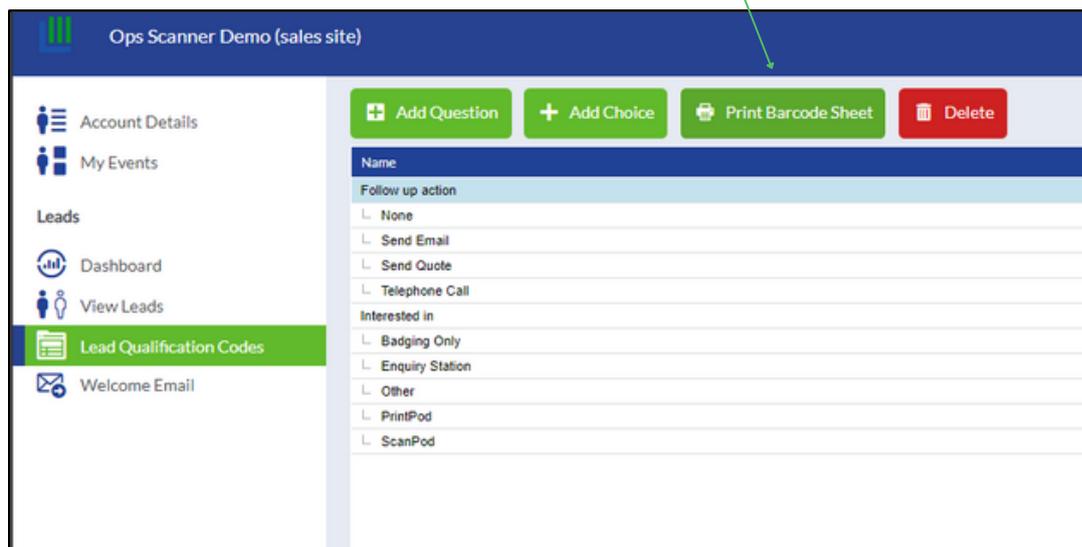
You can put as many questions and choices as you need.



4. Printing your barcode sheet

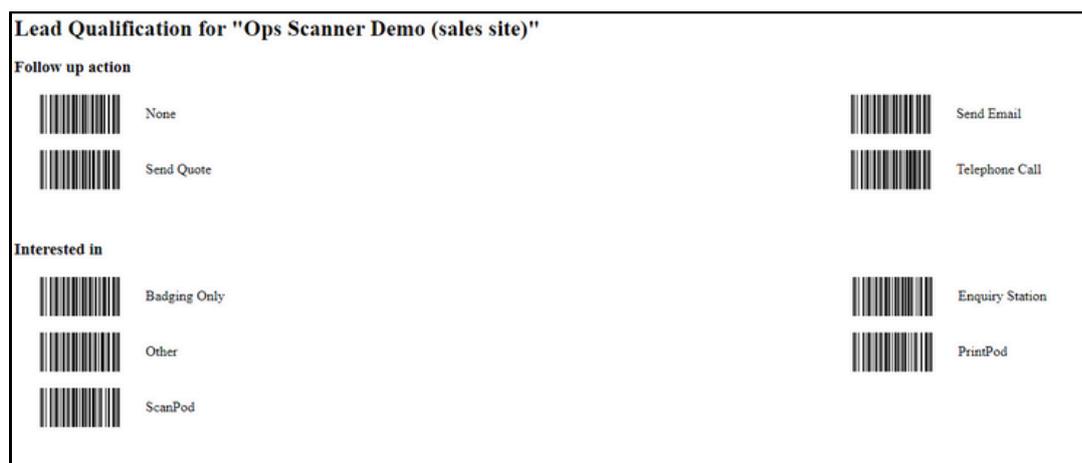
When you have finished setting up your questions and choices you need to print the barcode sheet.

Click the button at the top '**Print Barcode Sheet**'.



The barcodes will now appear in a pdf format in a separate tab.

Print these onto a sheet of A4 paper and bring it with you to the event.



When you are at the event you will **FIRST** need to scan the barcode on the delegate's name badge, **THEN** scan any relevant barcodes from your A4 sheet. You can scan as many barcodes on the sheet as you wish.

For more information or additional support, please get in touch.

+44 (0) 1827 61666.

info@reftech.com

www.reftech.com



YOUR EVENT. OUR SERVICE.

Full badging & registration solution

