

# 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.



#### 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.

LeadReference	
	Login Please enter your E-mail Address and Password and then click 'Login'
	E-mail Address
	Stay logged in Ecrocition. voor Passescet?
	윎 Login

#### 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.

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

Ops Scanner Demo (sales sit	e)
<ul> <li>Account Details</li> <li>My Events</li> <li>Leads</li> <li>Dashboard</li> <li>Ŷ</li> <li>View Leads</li> <li>Lead Qualification Codes</li> <li>Welcome Email</li> </ul>	Add Question + Add Choice Print Barcode Sheet Delete Name Add a Question Save Save and New Cancel Name:
Ops Scanner Demo (sales s	site)
My Events	Name
Leads         Image: Dashboard         Image: Dashboard	Add a Question X Save and New Cancel Name: 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.

Ops Scanner Demo (sales site)					
Account Details	🚦 Add Question 🕇 Add Choice 🖶 Print Barcode Sheet 📄 Delete				
P My Events	Name Follow up action				
Leads Dashboard	L None Add a Choice X				
View Leads	Question: Follow up action V				
Welcome Email	Name: Send Email				

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

Ops Scanner Demo (sales site) Zor T		
<b>♦</b> Account Details	Add Question + Add Choice      Print Barcode Sheet     Delete	
My Events	Nane	Type
	Folow up action	Question
Leads	L None	Choice
	L Send Email	Choice
Dashboard	L Send Quote	Choice
<b>1</b> 8	L. Telephone Call	Choice
View Leads	Interested in	Question
Lead Qualification Codes	L. Badging Only	Choice
	L Enguiry Station	Choice
Velcome Email	L. Ober	Choice
	L PintPod	Choice
	L. ScanPod	Choice

#### 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'.  $\backslash$ 

site)
🛨 Add Question 🕇 Add Choice 🖶 Print Barcode Sheet 🛅 Delete
Name
Follow up action
L None
Send Email
Send Quote
L Telephone Call
Interested in
Badging Only
Enquiry Station
Cother
PrintPod
L ScanPod

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.

Lead Qualification for "Ops Scanner Demo (sales site)"					
Follow up action					
	None		Send Email		
	Send Quote		Telephone Call		
Interested in					
	Badging Only		Enquiry Station		
	Other		PrintPod		
	ScanPod				

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.

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## <ref:tech>

### YOUR EVENT. OUR SERVICE. Full badging & registration solution

