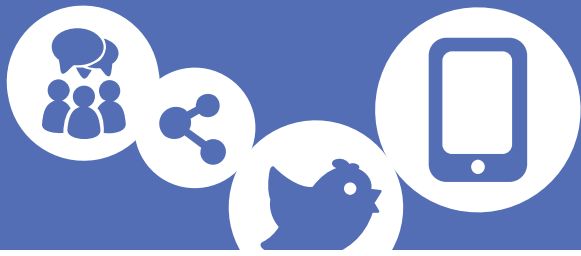# How to:

Create and use Lead Qualification codes

LeadReference

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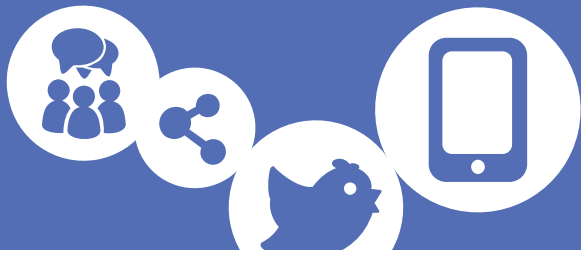
When you log in, you will see the events your account is linked to. This could be one event or many – depending on what events you have ordered scanners for.

DOUBLE click the event you wish to view
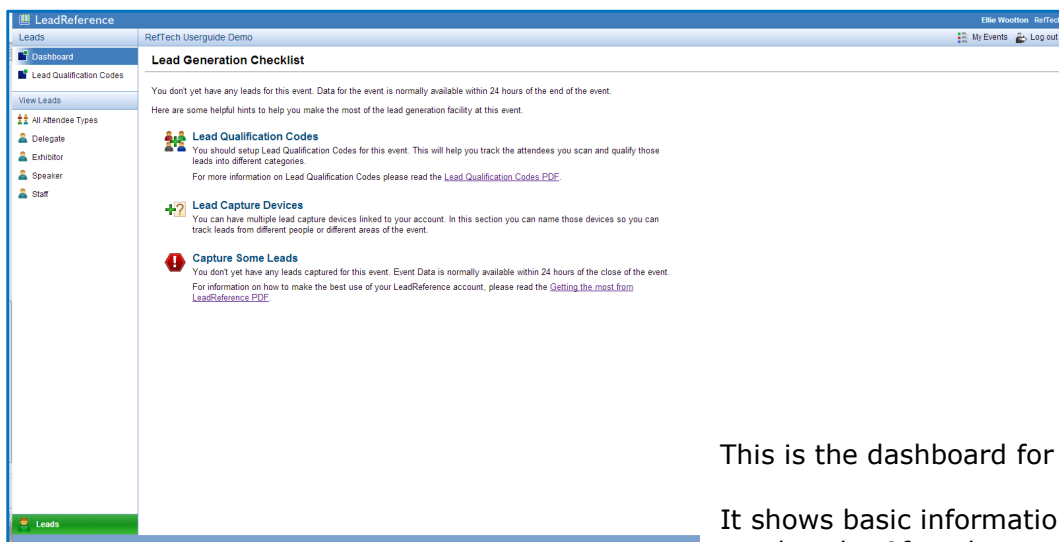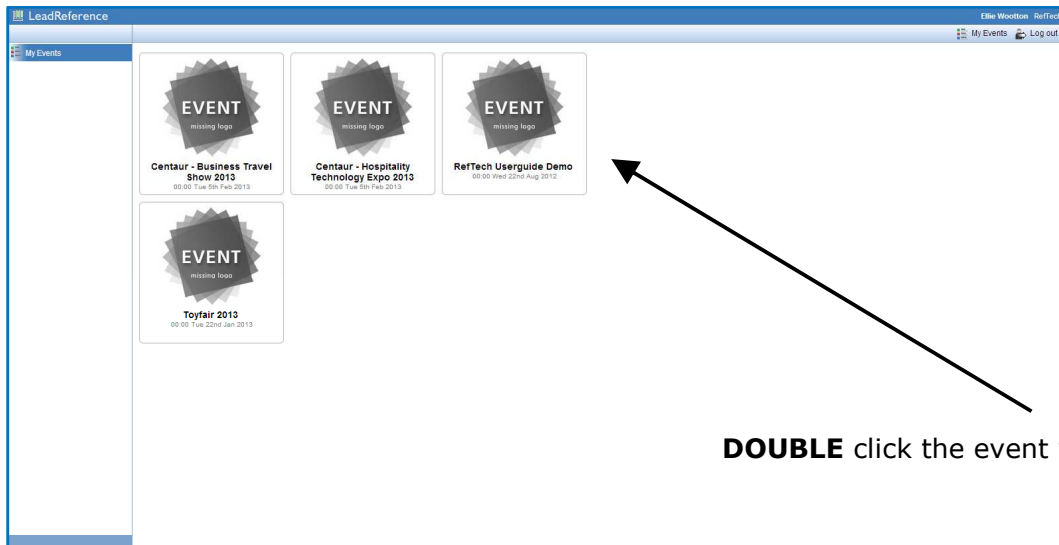
This is the dashboard for the event.

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
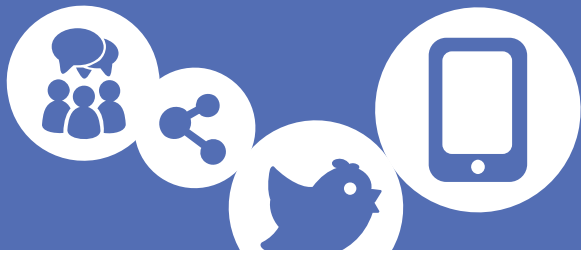
# 3. Creating your lead qualification codes (barcode sheet)

This is where you set up the barcode sheet for on-site 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)
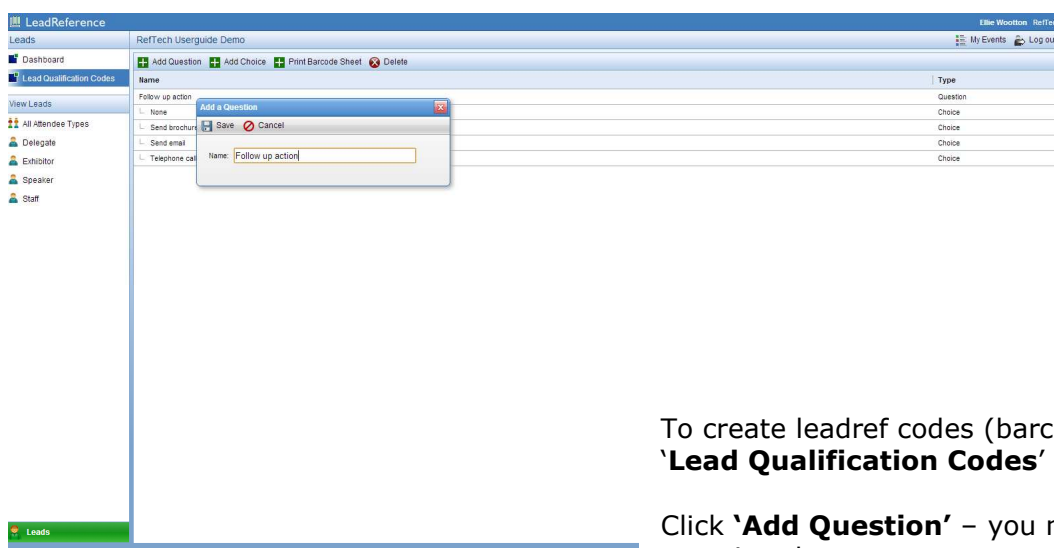
To create leadref codes (barcodes) go to the '**Lead Qualification Codes**' tab.

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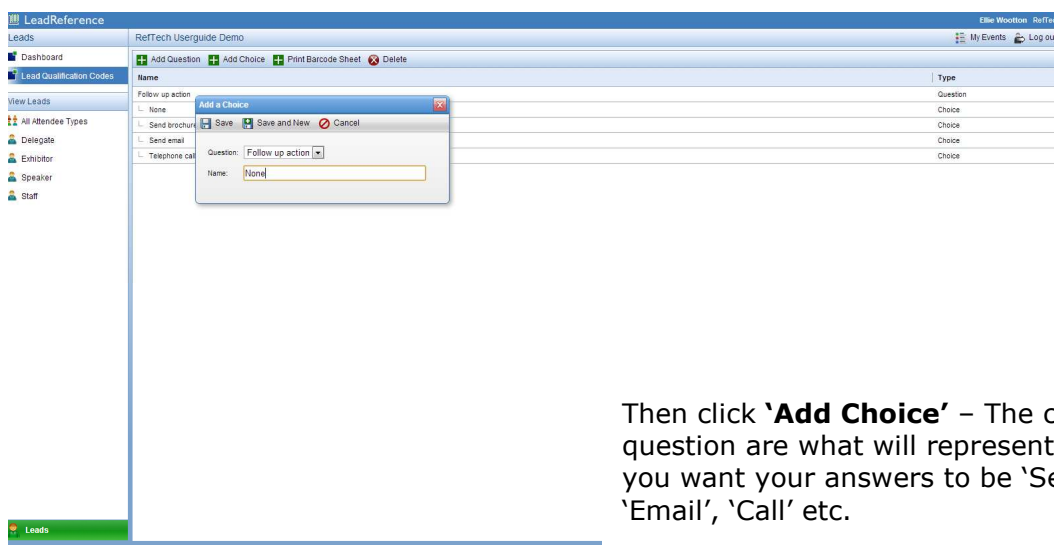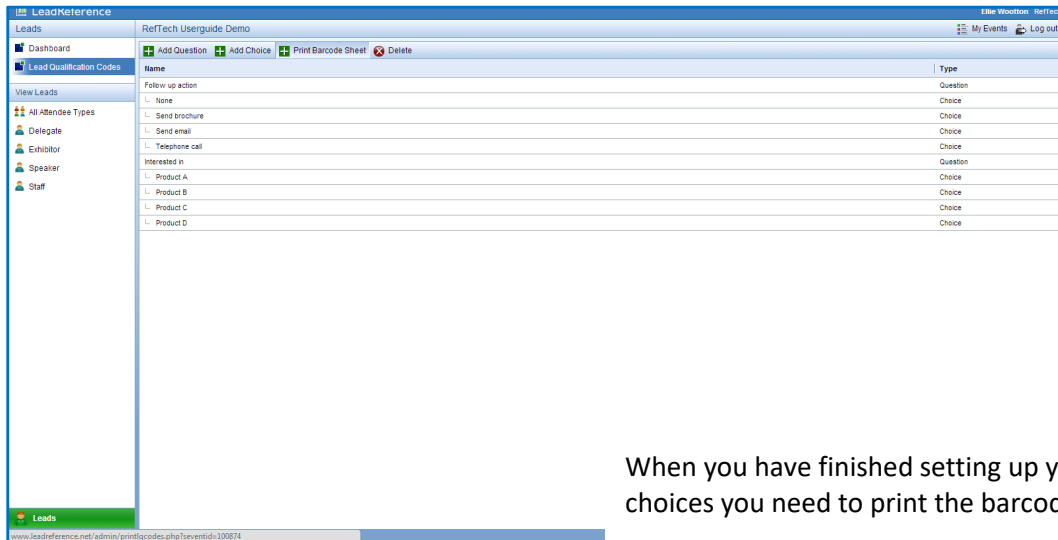

Then click **'Add Choice'** – The choices for this question are what will represent the barcodes. So you want your answers to be 'Send brochure', 'Email', 'Call' etc.

You can put as many questions and choices as you need.
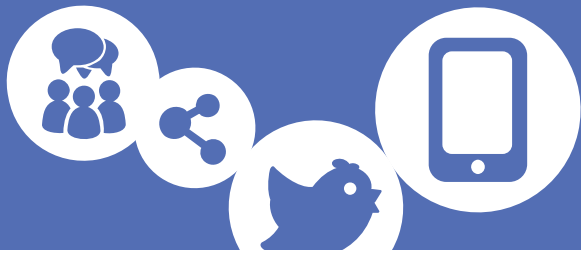
4. Printing your barcode sheet

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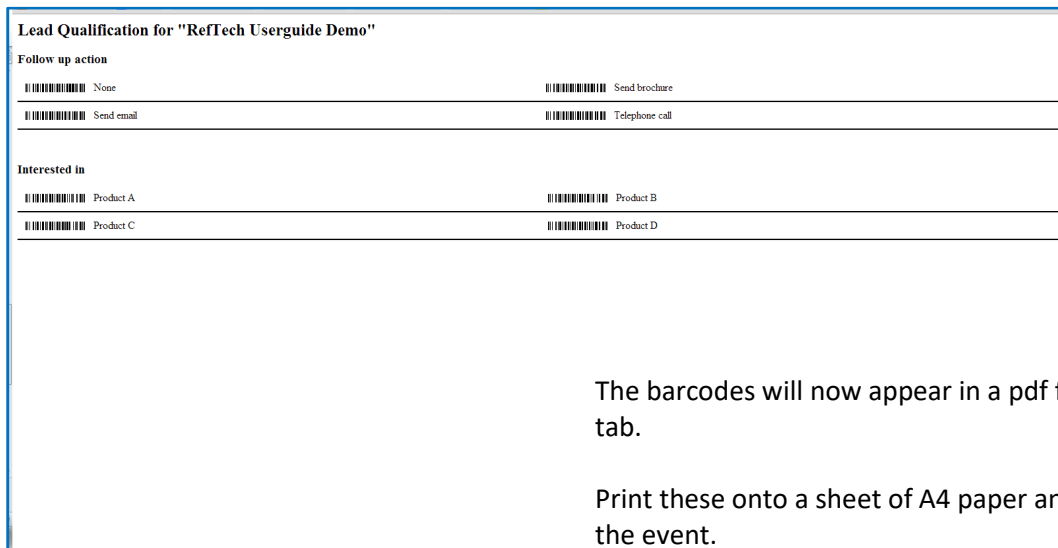
The barcodes will now appear in a pdf format in a separate tab.

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.

EventReference

- ✓ Event Registration
- £ Paid Registration
- 📅 Event Management
- 🌐 WebBadging
- 📊 Event Reporting
- WebScanning

YOUR EVENT. YOUR WAY.

Self-service registration & badging

"I've signed up for EventReference"

"I can't believe how easy it is to get all the reports I need"

"I found it to be fast, powerful and easy to use for my event"

"I was able to extract the information easily, which is perfect"

"Being able to target abandoned registrations helped drive my registration numbers up"

What our customers say...

"We have been using EventReference through RefTech for over two years now and in this time we have seen it develop and progress constantly. As a small, independent conference organiser, Opening Doors & Venues needed a straightforward, pay-per-event platform for gathering registrations, that would be easy to manage in-house - it is exactly what EventReference offered us. We use the platform for both free-to-attend and paid-for registrations with multiple attendee types and varied fee structures and find the interface very user friendly, whether it is for building a landing page or formatting the registration form. We must also applaud the RefTech staff for their patience and promptness in providing the support we constantly require - even though at times we ask the oddest of questions!"

Madalina Marincas, OPENING DOORS & VENUES

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