

Exhibitor

# Lead Capture

Mobile Application & Web Portal



Expo™



# The next generation of event management solution.

'Expo' by Codegate uses the latest systems and technologies to make your event run smoother and to provide that innovative and professional experience.

We make event registration, tracking your delegates, seating your diners and informing your exhibitors fast and simple for any size of event.

Your event information is updated in real time to the cloud, so you have access to all of it via a simple portal anywhere with internet access.

This document describes how the [Exhibitor Lead Capture Application & Web portal works](#).

## ABOUT CODEGATE EXPO LEAD CAPTURE

When using Codegate Expo, Exhibitors can enjoy the benefits of a comprehensive yet simple application to capture lead information from delegates using a regular mobile phone or tablet.

The Application is split into two parts:

- An On-line Web Portal to set up your mobile app settings and to view your leads.
- A Mobile Application to scan delegate badges with.

### Fast, Accurate Data Capture.



Functionality allows you to:

- Create simple 'Interest' check boxes for the app to save you time when capturing delegate interests.
- Set up automated email responses to your delegate so that they receive a personalised email every time you scan their badge.
- Download the application to your own mobile device, no need to hire expensive bar code readers.
- Capture data quickly and easily.
- View real time graphs of leads captured, by interest and by who captured them.
- Download real time Excel spreadsheets at anytime throughout the event showing all the data.

# Supporting your live event

## ACCESSING THE WEB PORTAL



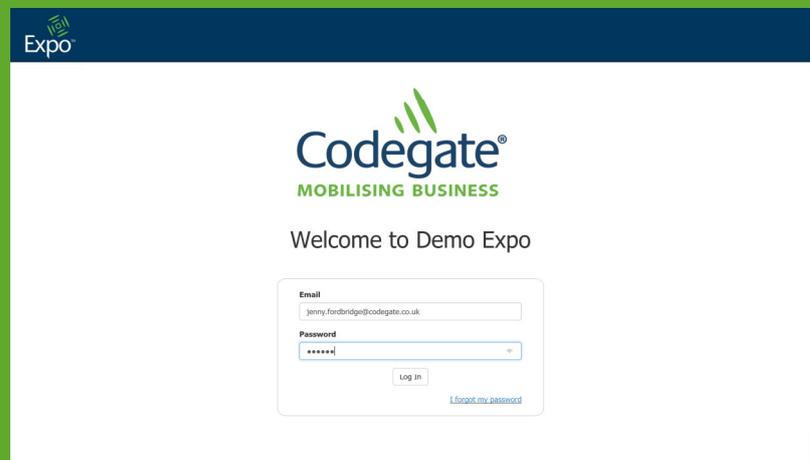
Organisers have an opportunity to switch on this service for exhibitors at the point of a stand being booked.

As exhibitors register their on-site staff, organisers will link them to the company giving them access to use the application.

An auto-email is sent to the lead exhibitor with a URL link to access the web portal, a password can be included, or exhibitors can set up their own via their web-link.

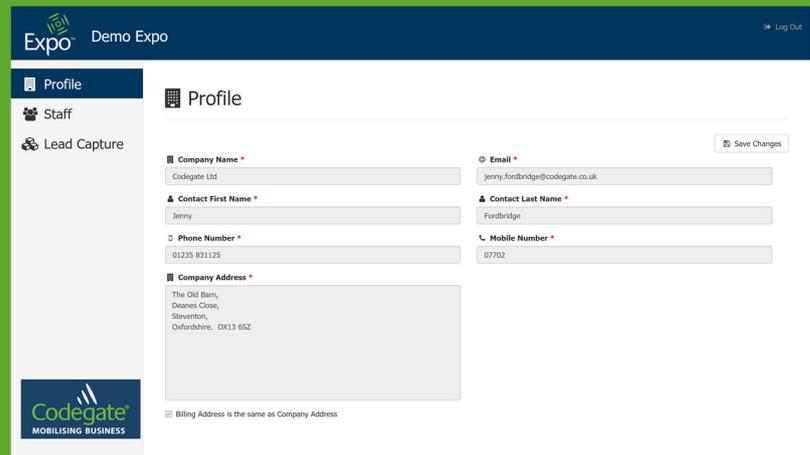
## COMPLETING YOUR USER PROFILE

Log into the Exhibitor web portal using the link that you have been provided in the auto email sent to you by the event organiser.



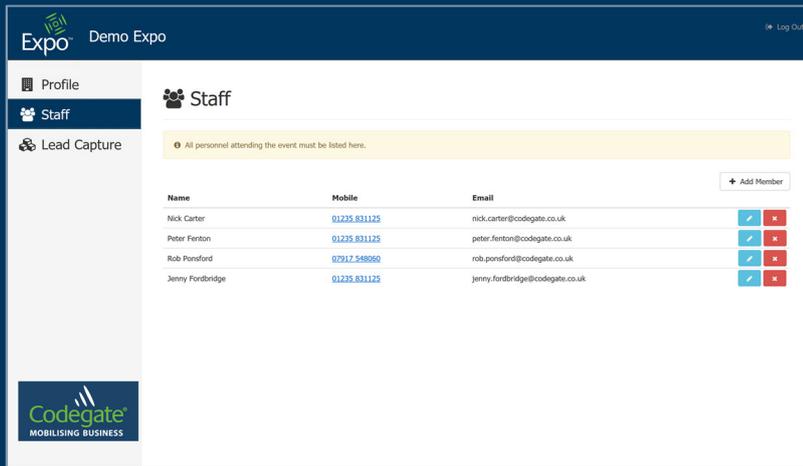
The Profile screen shows the details of the Exhibitor Company and the person that booked the stand space.

Some organisers will have this data locked down so that it can't be amended without contacting them, others will let you edit your details on this screen. If you are enabled to edit the data, save your changes by clicking on 'Save Changes'.



# Take the pressure out of your next event & let Expo do the work.

## CHECKING STAFF ACCESS



By clicking on the 'Staff' option in the main menu, you can see a list of staff who have registered and have access to use the mobile application.

Click on the 'Add Member' button to add a staff member, the 'Pencil' button to edit their details and the 'Red Cross' to delete a member.

Some organisers will lock down the adding & editing functionality.

## SETTING UP INTERESTS

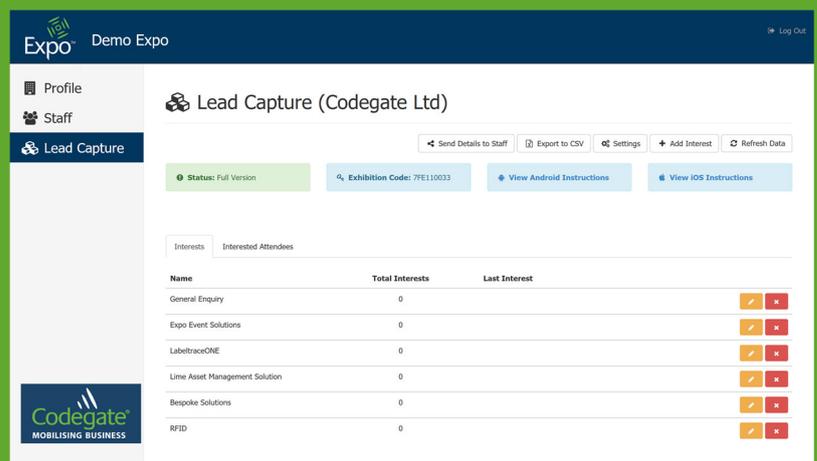
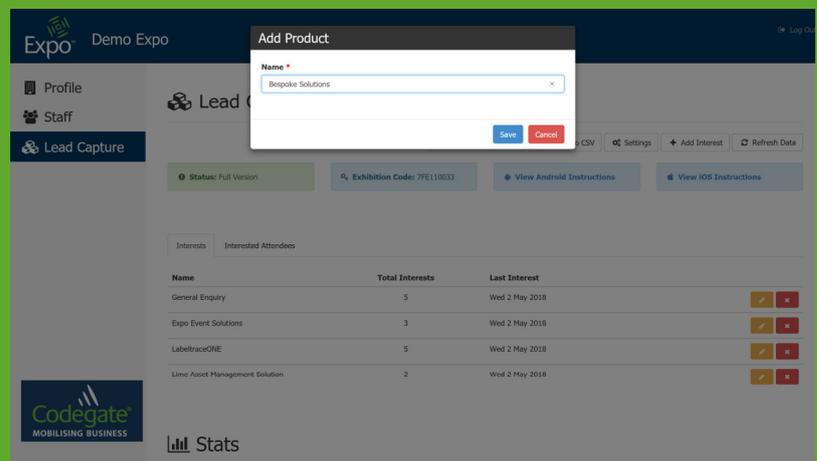
An 'Interest' could be a product, service or information request that you would like to categorise your leads by. For example, if a delegate is interested in a new product you are selling, you would set this up as an interest.

This means that you would be able to report your leads by that product.

To add a new interest to the list, click on the 'Add Interest' and then type in your interest name and click 'Save'.

The new interest is then added to the list in the 'Lead Capture' screen.

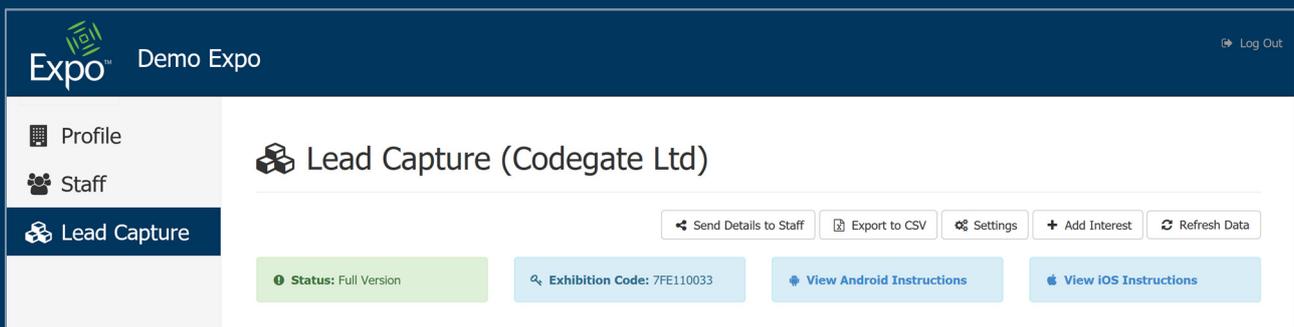
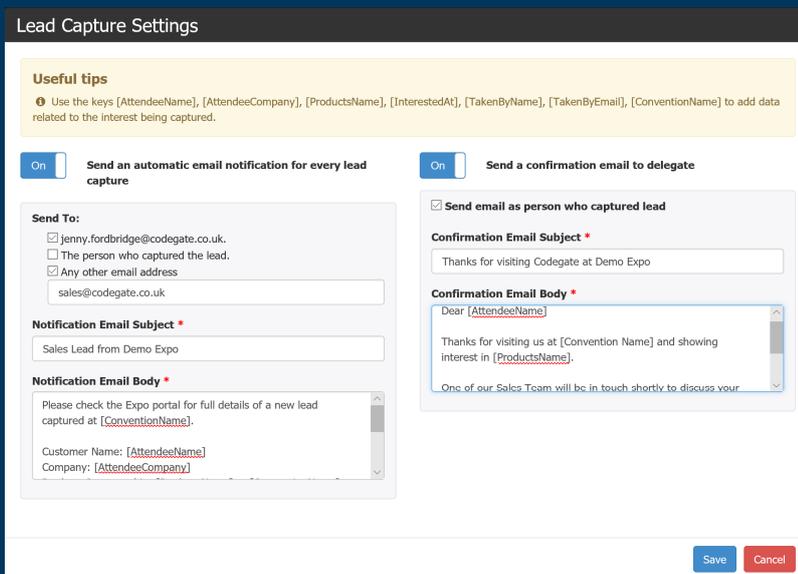
You can edit or delete the interest at any time by clicking on the 'Pencil' icon or the 'Red Cross'.



# Your event is our top priority

## SETTING UP AUTOMATIC EMAIL RESPONSES

Expo 'Lead Capture' allows you to set up emails to go to your marketing team and to the delegate automatically when an exhibitor scans their badge. From the 'Lead Capture' screen in the web portal, click on the 'Settings' button.

You can switch on the different emails independently, so you can send just to delegates or just to your Marketing team.

Click on the slider switch of the email type that you would like to turn on.

The email settings on the left are for internal emails to your marketing team and the email settings on the right are for external emails to delegates.

At the top of the screen, in the 'Useful Tips' box, there are a number of fields that you can use within the body of your email, these will automatically change to actual captured data.

For Example, if you added the text "Dear [AttendeeName]" into your email, the '[AttendeeName]' text would be replaced in the actual email with the delegates own name making it a much more personal email response.

The email will automatically include the official exhibition logo.

When you have added all the email information, click on the 'Save' button at the bottom of the form to make the email settings live.

# Accurate real time reporting keeping your team up to date

## REVIEWING THE CAPTURED DATA

The 'Lead Capture' page will be able to access data in real time. Clicking on the 'Refresh' button will always update the data to show the latest results.

The 'Interests' tab will show the total number of interests uploaded and the time and date of the most recent one. Clicking on the 'Interested Attendees' tab will display the delegates scanned.

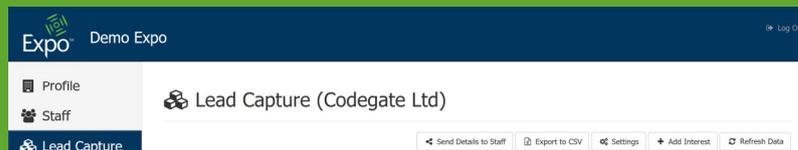
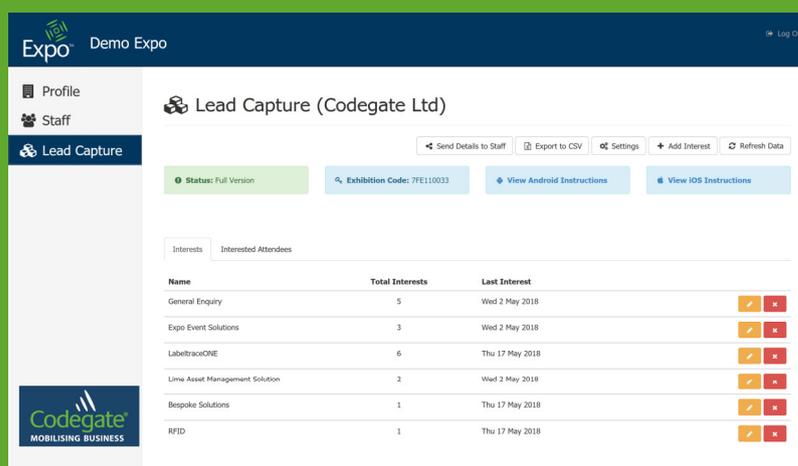
Scrolling down the page, a Stats graph shows the number of leads captured per day and per interest.

Hovering your mouse over the graph will show the exact numbers.

If you scroll down the page further, you will see a breakdown of:

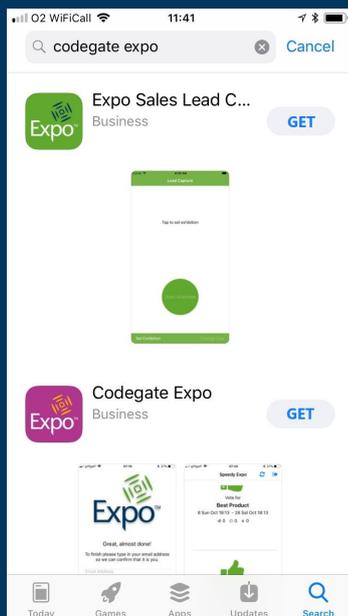
- Leads per Product/Interest
- Leads captured by staff
- Interests captured by staff

To download all your responses, click on the 'Export to CSV' where a full data set will be presented. This can be downloaded any time.



# Simple Data Capture Solutions

## DOWNLOADING THE MOBILE APPLICATION

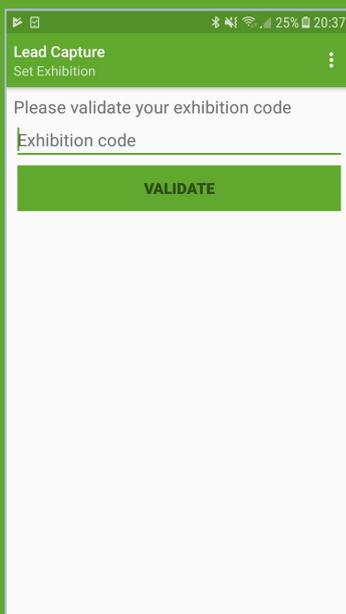


Expo 'Lead Capture' is available to download for Android devices from the Playstore and for Apple devices from the App Store. For large numbers of corporate devices, Codegate can provide an '.apk' file to install locally on to devices.

In your app store, type 'Codegate Expo' into your search bar, and you will be presented with several of our Expo apps to choose from, all apps are colour coded.

The 'Lead capture' app is the **green** one. Download this onto your device, it can be loaded onto smart phones or tablets. Your app store will not charge you to download this app.

## SETTING THE EXHIBITION CODE



The first time that you start the mobile 'Lead Capture' app, you will be asked to enter and validate your exhibition code.

This code is unique to your exhibition stand and allows the device to upload your leads to the correct place.

Your exhibition code may have been emailed to you by the event organiser, but it can be found on the lead capture page of the exhibitor's web portal.

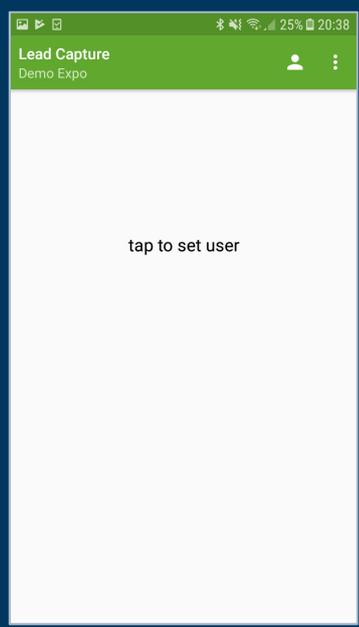


POWER  
TOWERS  
Low-level Powered Access  
a JLG company



# Download to your own mobile phone or tablet

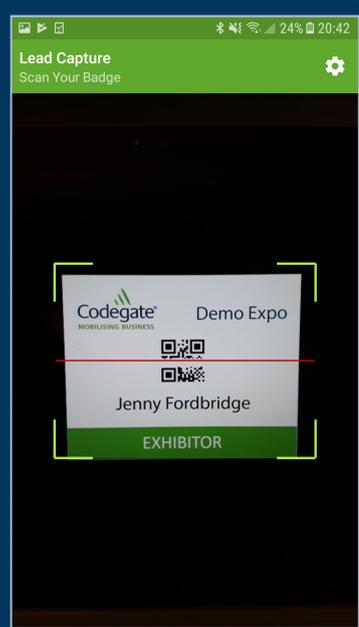
## ASSIGNING A USER



To Allocate a user to the device, tap on the screen and the camera will be activated.

Use the red line on the screen and line it up with the barcode on your Exhibitors badge. (Lead Capture will recognise most 1D and 2D bar codes.)

Once the barcode has been successfully scanned, the app will proceed to the home screen. On the Android version of the app you can make the device beep or vibrate when scanning by tapping on the settings icon in the top right corner.



## CHANGING THE USER OR EXHIBITION



There is a slight difference between the Android and Apple versions of the application due to the way that their operating systems work.

Changing the user on the android version of the app can be done by tapping on the 'person' icon in the top right of the screen which will power up the camera again. On the Apple device the 'Change User' option is in the bottom right corner.

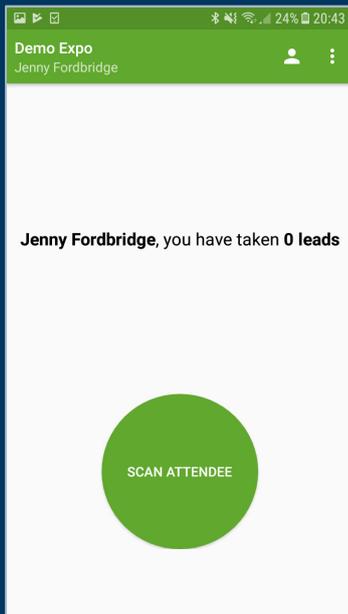
To change an exhibition code on the Android device, tap on the 'three dot' icon in the top right of the screen, on the Apple there is an option in the bottom left of the screen.



# No limit to the number Of users or delegates scanned



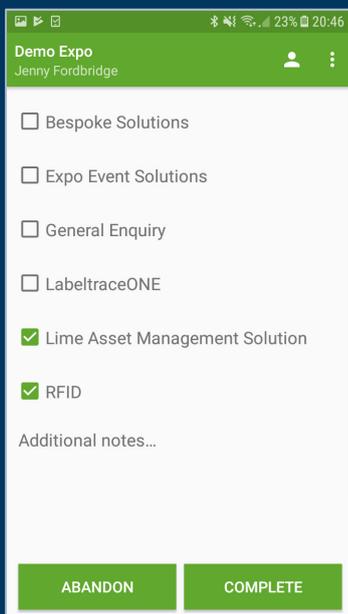
## SCANNING A DELEGATE



To scan a delegate's badge, tap the 'Scan Attendee' button, this will power up the camera to scan the barcode.

Use the red line on the screen and line it up with the barcode on the delegates badge.

When the scan has been successful, the app will take you to the 'Interest' screen.

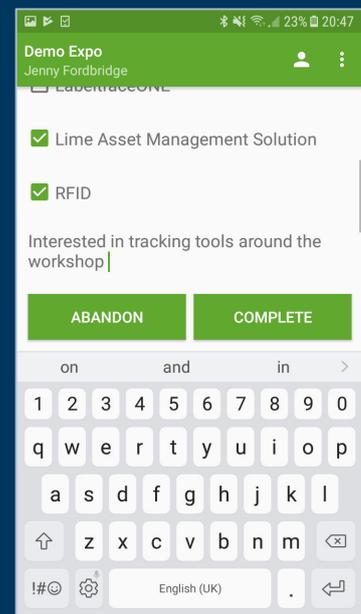


Select the interests that apply to that delegate, you can select multiple interests if they apply.

If you want to add additional information, tap in the 'Additional Notes' area and type.

Tap on the 'Complete' button, when the enquiry is complete or 'Abandon' to delete the information captured so far.

The screen will revert to the 'Home' screen, ready to capture the next lead.



Data from the lead capture app will upload to the web portal every couple of minutes when the device has access to an internet connection. If there is no Wi-fi or mobile network available, the app will hold the data on the device and upload it when the device reconnects to the network and the app is turned on.

# Lead Capture is part of The Expo suite from Codegate

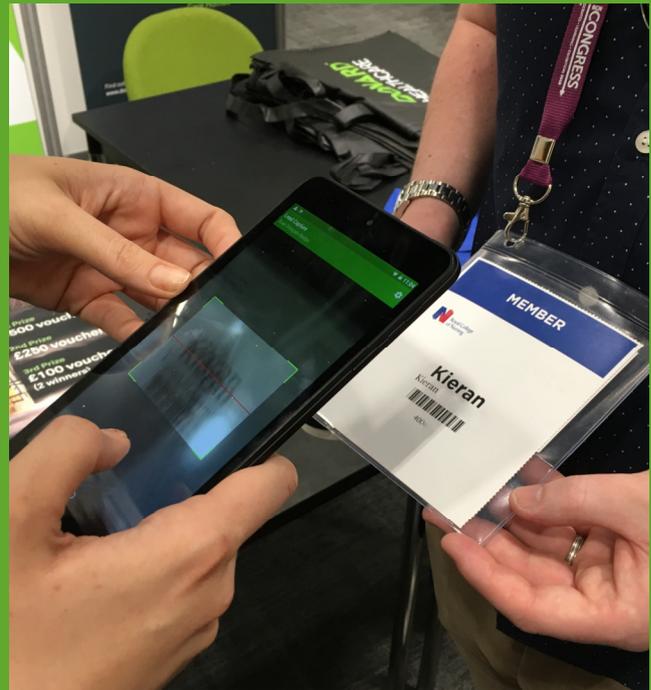
## DATA PROTECTION AND PRIVACY

Codegate take data protection very seriously, you can find out more about our privacy policy at [www.codegate.co.uk/privacy](http://www.codegate.co.uk/privacy).

In this application, Codegate are the data processor and it is the responsibility of the organiser to ensure that delegates are aware that by allowing their badge to be scanned by an exhibitor, they are giving their permission for their contact details to be passed on to them.

The mobile application does not pass any personal data from the mobile device, all personal information is captured at registration and stored on a secure server, accessed by the exhibitor using a unique user email and a password.

If you would like to contact our Data Protection Officer, please email [GDPR@codegate.co.uk](mailto:GDPR@codegate.co.uk).



## MORE INFORMATION

Please look at our website to find out more about Expo and to see some recent case studies: [www.codegate.co.uk/expo](http://www.codegate.co.uk/expo)

If you would like to speak with one of our event co-ordinators, please call 01235 831125 or email [info@codegate.co.uk](mailto:info@codegate.co.uk)