Using the Exhibitor Portal for LeadCapture

As an Exhibitor Admin, you'll play an integral part in your organization's lead gathering. You'll need to register your organization and booth staff and provide them with LeadCapture licenses. Booth Staff are the members of your team that will be on the front lines, representing your organization at the event and scanning potential leads. The instructions below will show you how to access the Exhibitor Portal, add your dream team, and export the leads they collect.

1 Access the Exhibitor Portal. If you have already pre-purchased licenses, locate the LeadCapture invitation in your inbox, and click **Get Started**. Create a password and click **Log In**. **Then skip to step 3**.

If you have not pre-purchased licenses, you will receive a Welcome email inviting you to the Exhibitor Portal. Click on Log In link to create an account.

Log in to your account and complete the sign-in process by entering your email address, a new password, and your organization's name. The site will redirect you to the Exhibitor Portal Welcome Page.

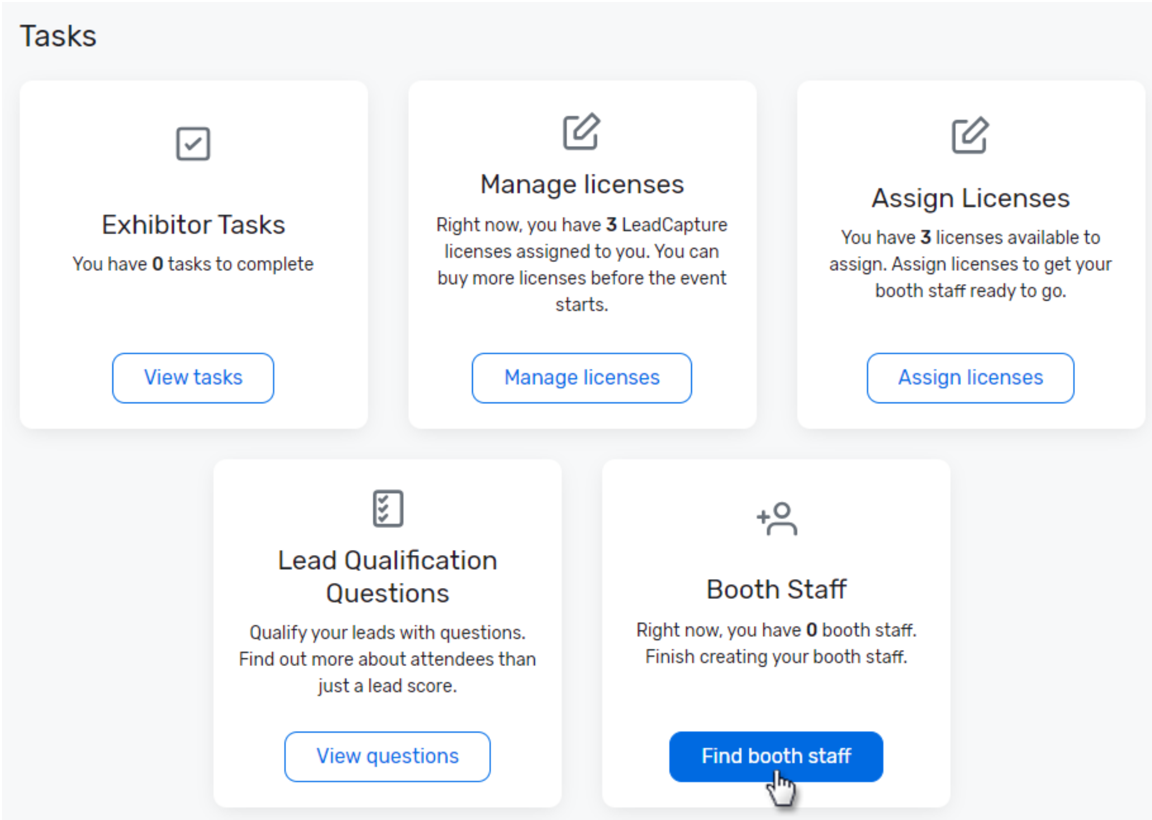
2 Purchase your licenses, if necessary. From the Welcome Page, click **Manage licenses**, then **Purchase Licenses**. Next, select *App Licenses* which requires your booth staff to download the LeadCapture app on their own device in order to scan leads.

Check the box to the right of Single to purchase one LeadCapture license, or click the plus sign **(+)** to increase the quantity of how many devices you want to purchase.

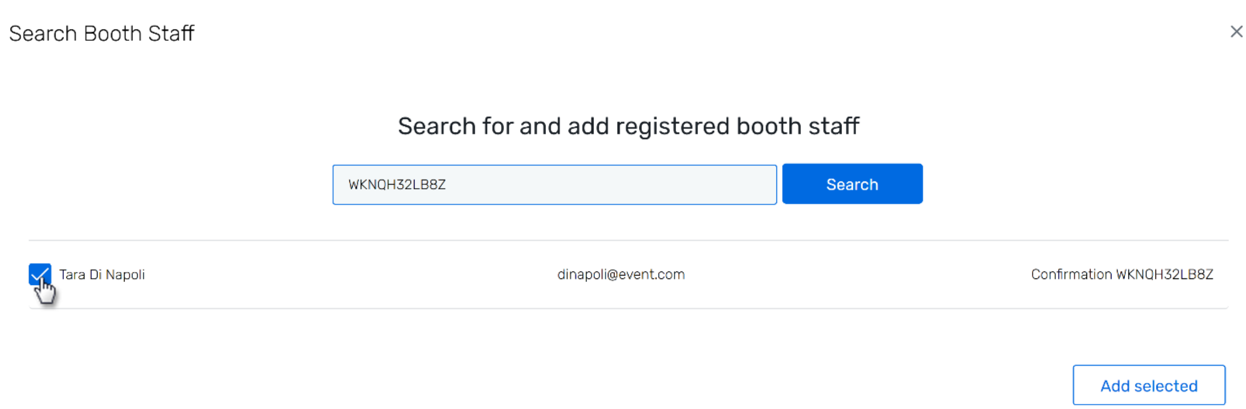
Once you've made your selections, click **Go to checkout** to complete the transaction.

3 Add badge kit access, if necessary. If you are working with a third-party lead solution, follow these instructions to purchase access to the API and integrate the badge kit.

4 Add your staff. From your event's home page, click **Find booth staff**.



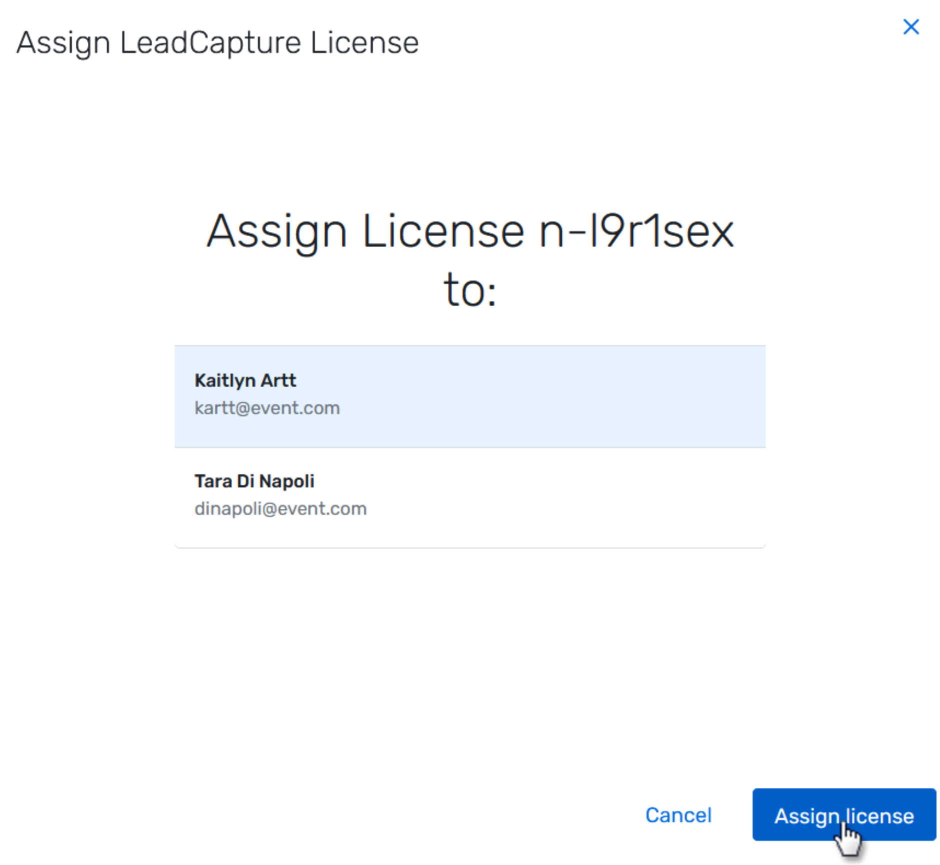
In order to add someone as booth staff, they need to be registered for the event as an attendee. Search for your team by registration confirmation number and check the box next to their names. Please email drojas@bgca.org to register your staff to this new registration.



Repeat as necessary. When you're done, click **Add selected**.

5 Assign licenses. Your staff won't have access to scan leads in the LeadCapture app until you assign them a license. To do so, click **Licenses** from the left-hand navigation. All of your license codes will be listed.

Click **Options** next to one of your unassigned license codes, then **Assign License**. Click the circle next to the person you want to assign the license to, then **Assign**.

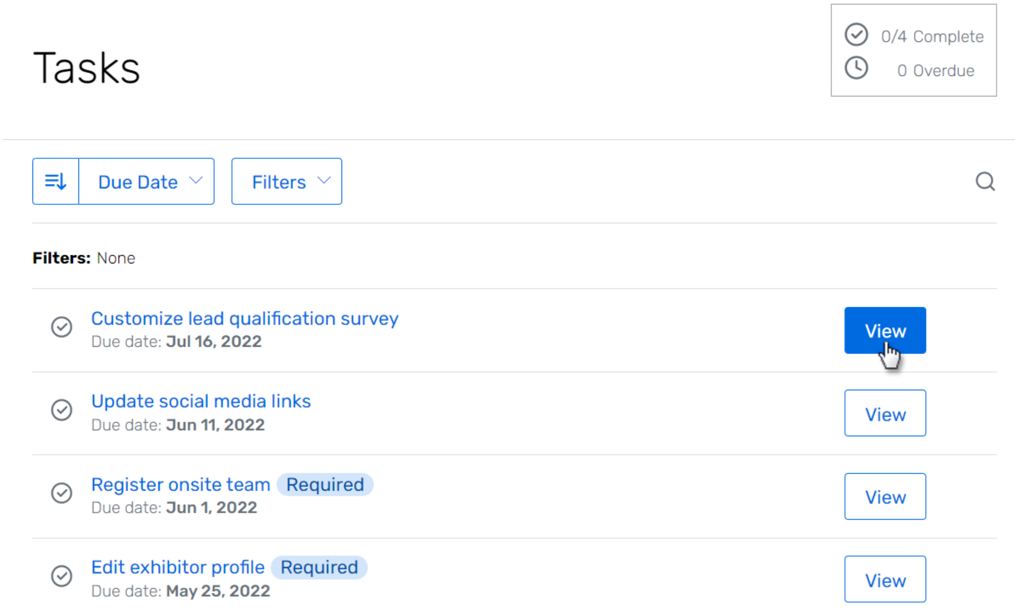


They'll automatically receive an email with their access code to log in to the LeadCapture app.

6 Create questions for your booth staff to answer while collecting leads. From the left-hand navigation, click **Lead Collection**. The Leads Collected tab opens by default. Click the neighboring tab, **Lead Qualification Questions**. Then build out your questions.

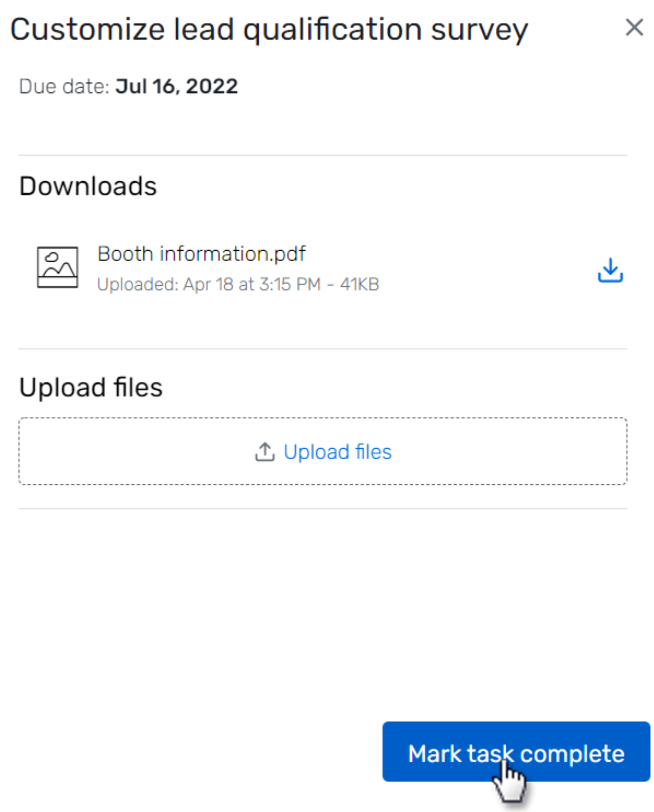
7 Manage and complete assigned tasks. The planner of the event you're attending may have assigned you tasks to complete prior to attending the event. From the left-hand navigation, click **Tasks**.

A list of your assigned tasks will appear. Click **View** next to the task you want to manage.



Any attachments or links that the planner has provided will appear here. If the planner has required you to upload an attachment, click **Upload files**, browse for the file on your computer, then click **Upload**.

When you've finished the task, click **Mark task complete**.



Repeat these steps for each task that you're assigned.

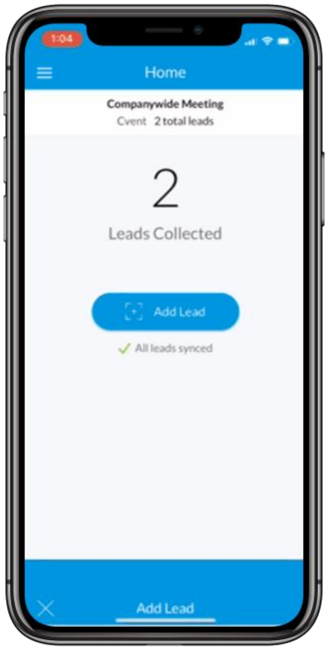
8 Fill out any custom fields. If the event planner has created custom fields to gather more information about your organization, respond to the questions. From the left-hand navigation, click **Exhibitor Profile**. Click **Options** in the top-right, then **Edit answers.**

Select your responses. When you're finished, click **Save.**

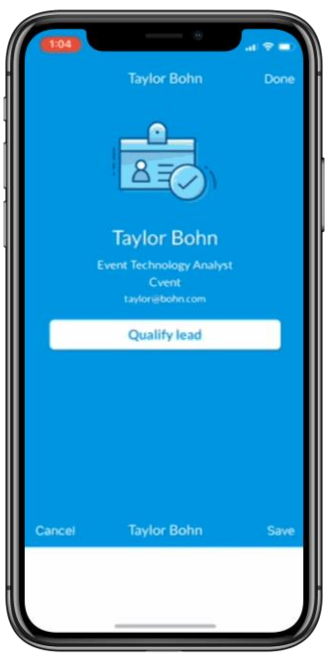
9 Capture leads. To scan leads, instruct your booth staff to download the Cvent LeadCapture app from the Apple App Store or Google Play Store.

Have them open the app, then enter their access code and tap **Next**, then **Yes, Activate Device**.

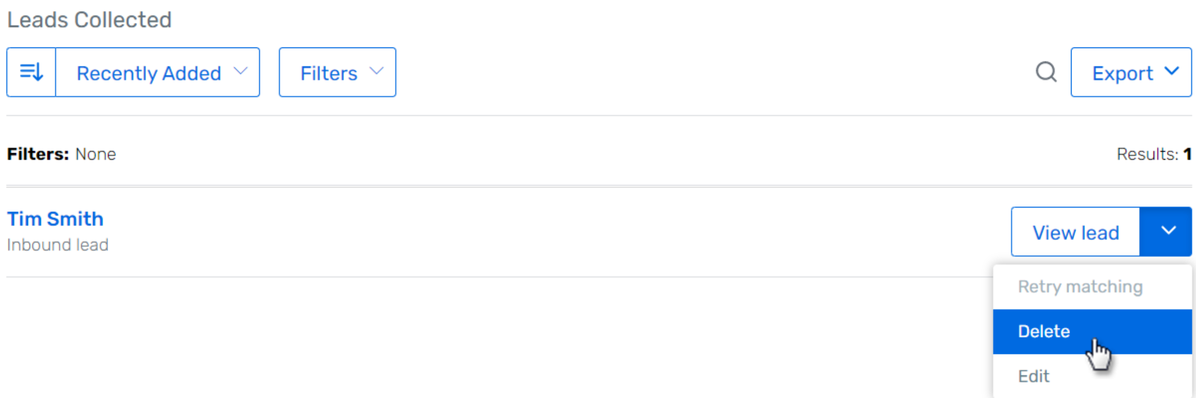
Tap **Add Lead** and scan the lead's QR code.



If necessary, tap **Qualify Lead**. Enter any qualifying questions, then tap **Save**.



10 Delete a lead, if necessary. If you accidentally scanned a lead that you no longer want to appear in reports, you can delete the lead in the Exhibitor Portal. From the left-hand navigation, click **Lead Collection**. Click the arrow to the right of the lead you want to delete, click **Delete**, then click **Delete lead**.



11 Export your leads. Once the event is over, [follow these steps] to export your leads to an Excel file.