Exhibitor Training Guide

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Verbiage to Know

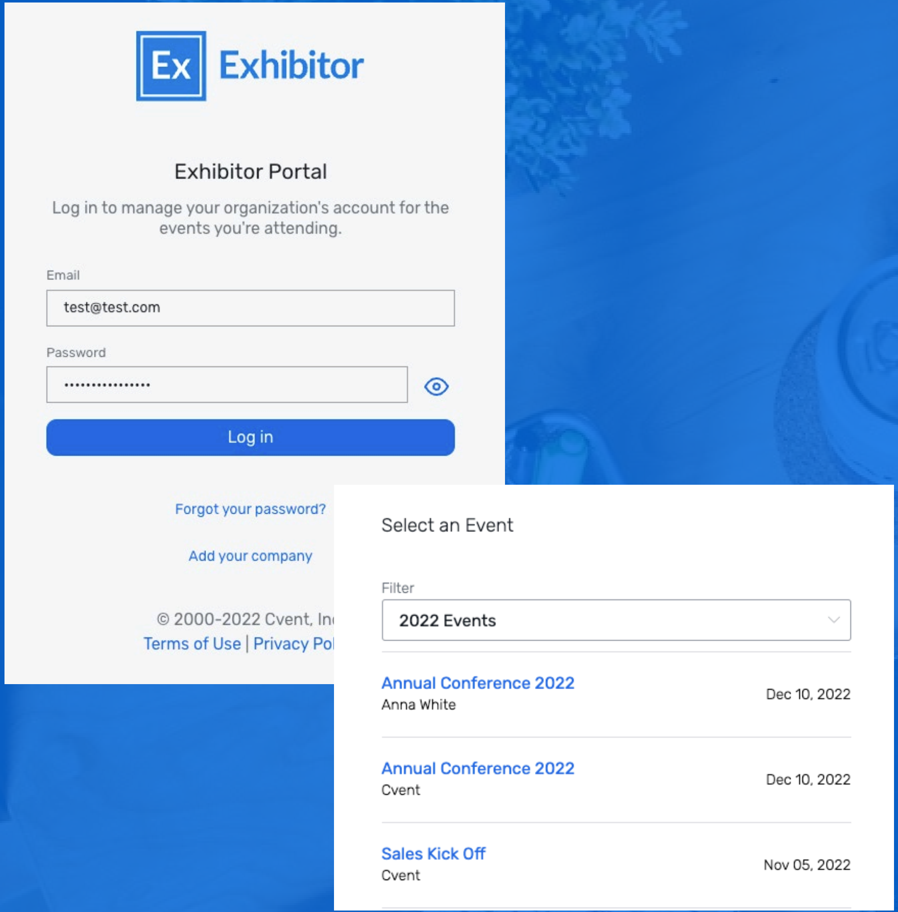
Exhibitor Portal - The platform where exhibitor admins can manage their virtual booths and LeadCapture licenses by adding booth staff, editing your profile and logos, adding content for attendees, accessing and assigning LeadCapture licenses, and exporting leads.

Attendee Hub - The Attendee Hub Website and App is where attendees will access the event to find key event information, view video content, engage with exhibitors, sponsors, and each other.

LeadCapture App – Cvent's lead retrieval app to scan and qualify leads onsite

LeadCapture Access Code: a one-time use access code entered into the LeadCapture App to load your profile. This code cannot be transferred to multiple devices or assigned to multiple booth staff.

Booth Staff - Team members associated to your exhibitor profile for all attendees to see, and who will be assigned any LeadCapture Licenses

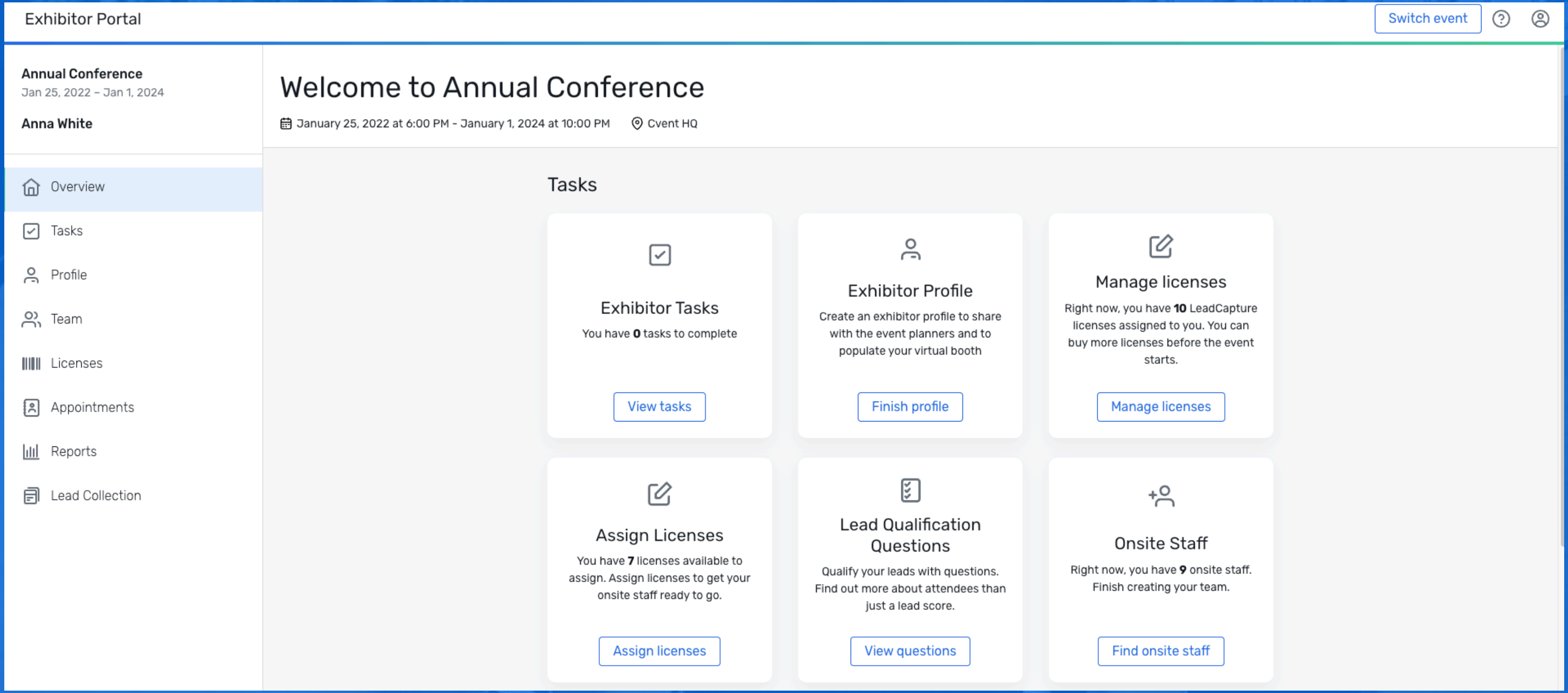


Log in to the Exhibitor Portal

The Exhibitor Portal is a great way to manage everything for your partnership. The admins entered by the planner will receive an email to login and create a password.

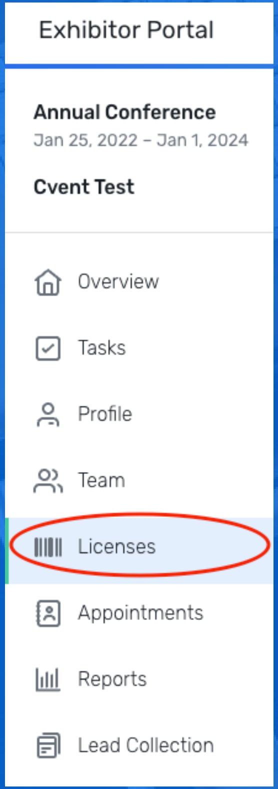
Once you’ve set your password, you’ll use https://exhibitors.cvent.com/login for any future logins. Re-using the original link can cause duplicate exhibitor accounts.

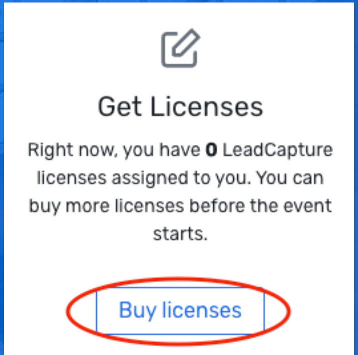
Exhibitor Portal Homepage



Pre-Event: Purchase Licenses

1. On the home page, go to the Get Licenses tile and select **Buy Licenses** or select **Licenses** from the left navigation bar and click the **Purchase** tab.
2. App Only: Add the desired number of licenses.
3. Click **Go to checkout** to complete the transaction.
4. You can get a copy of your invoices on the Invoices tab.





REMEMBER – you will need one license per device. These cannot be re-assigned once consumed.

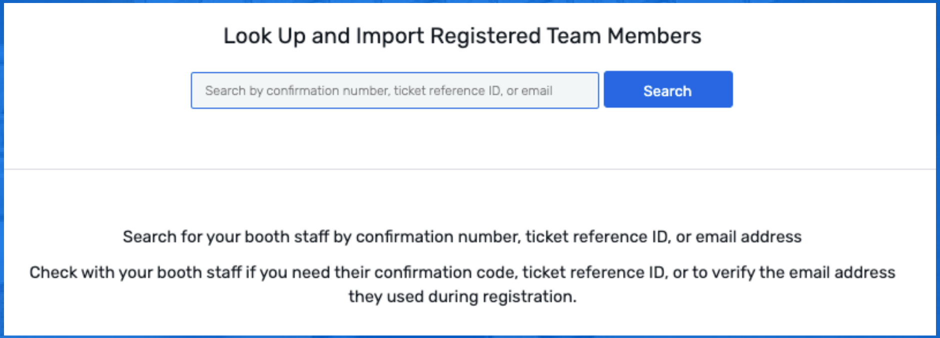
Pre-Event: Assign Booth Staff

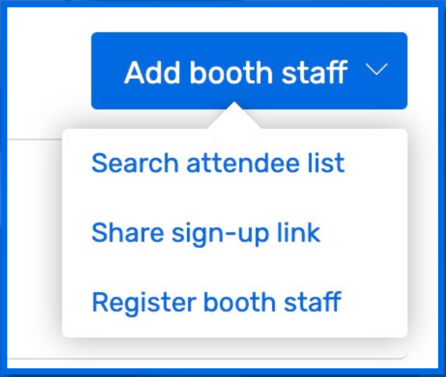
Booth Staff must be registered for the event in order to be assigned.

You can assign Booth Staff, whose names, titles, and profile images will be displayed within your virtual booth.

To add your Booth Staff, follow the below steps.

1. Click **Team** on left side
2. Click **Add Booth Staff.**
3. Search attendee list
    a. You can search by confirmation number or email.



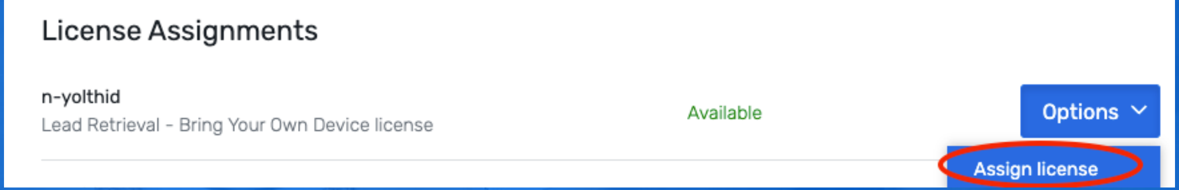


If you have additional staff members that need access to the Exhibitor Portal, you can add them on the Admin tab.

Pre-Event: Assign Licenses

To assign your licenses to booth staff follow these steps:

1. Click the **Available Licenses** tab within the Licenses section
2. Click **Options** next to a license, then **Assign license**
3. Select from available booth staff members and click **Assign**
4. The booth staff member will then receive an email including their access code

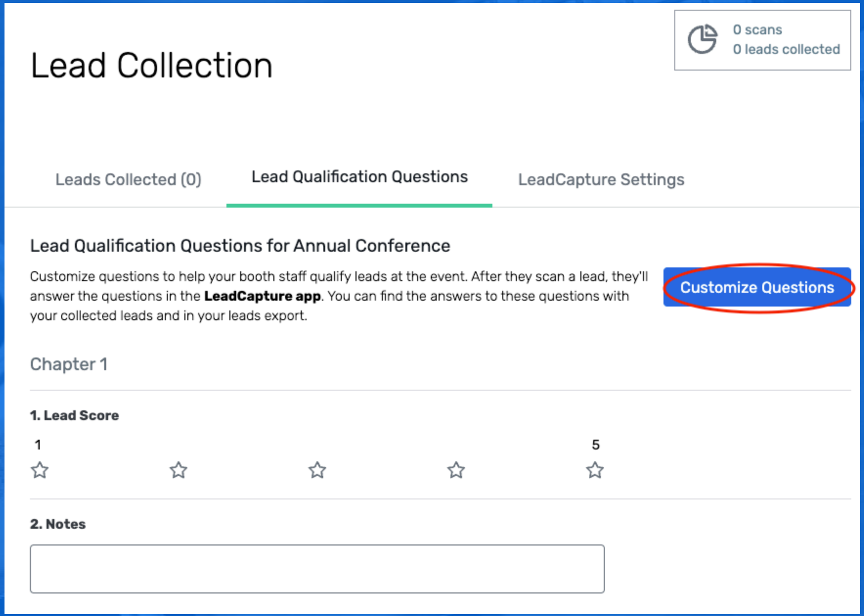


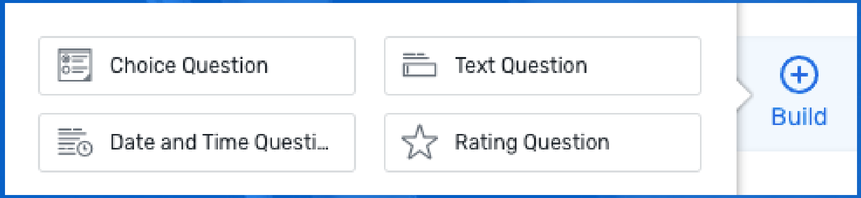
Pre-Event: Customize Qualification Questions

Create custom questions for your booth staff to qualify leads.

To customize your questions, follow the below steps:

1. Click **Lead Collection** from left-hand navigation menu. Click **Lead Qualification Questions** tab and **Customize Questions**
2. Press **Build** and select question type to add new questions or click into an existing question to edit text.
   - Reorder questions by clicking and dragging them into a new area
   - Hover over a question and click **…** to delete questions or add sub questions
3. Press **Save** to preserve changes

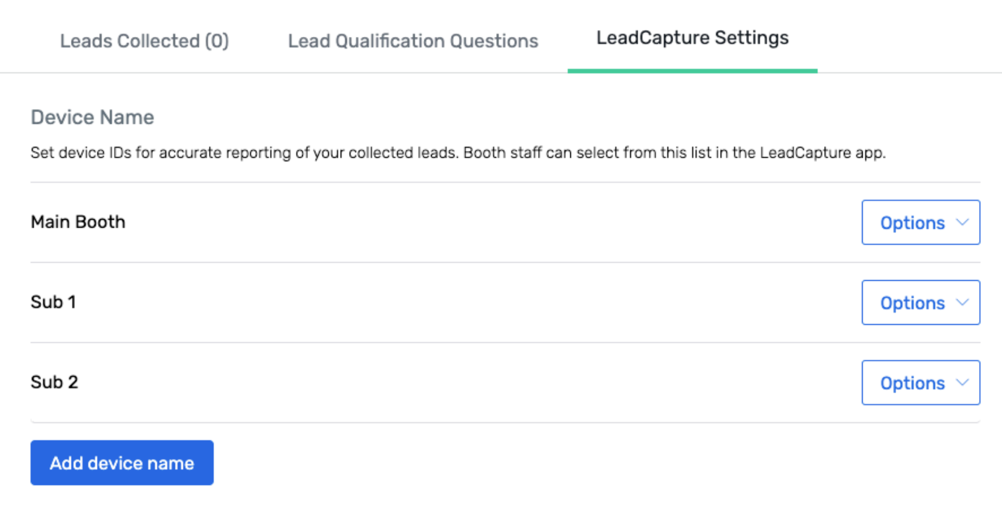


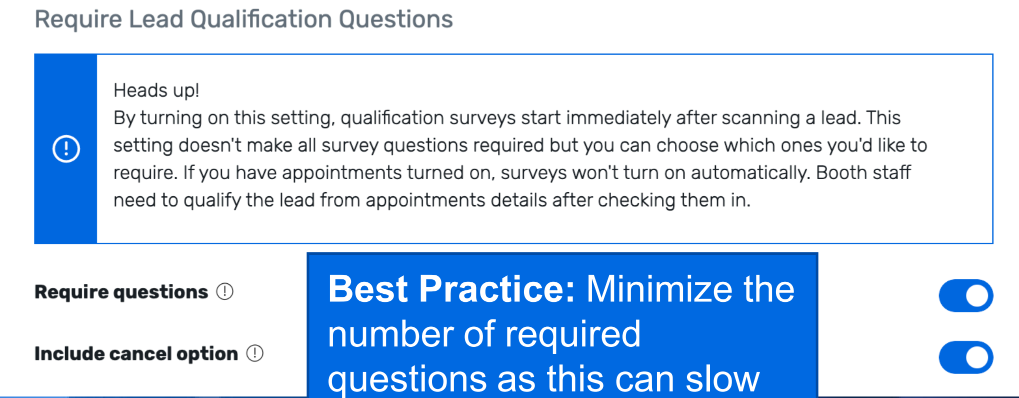


Pre-Event: LeadCapture Settings

Click the **LeadCapture Settings** tab to configure further settings.

1. **Add Device Names** for accurate reporting of your collected leads. Staff will be able to select from this list in the LeadCapture App
2. **Required Lead Fields** - Confirm what fields you want booth staff to be prompted to collect (you can also make them required so staff will not be able to complete a lead if left blank)
3. **Require Lead Qualification Questions** - If turned on, the qualification survey will start as soon as a lead is scanned. If it is not switched on, the booth staff member will be able to skip the questionnaire and fill out later

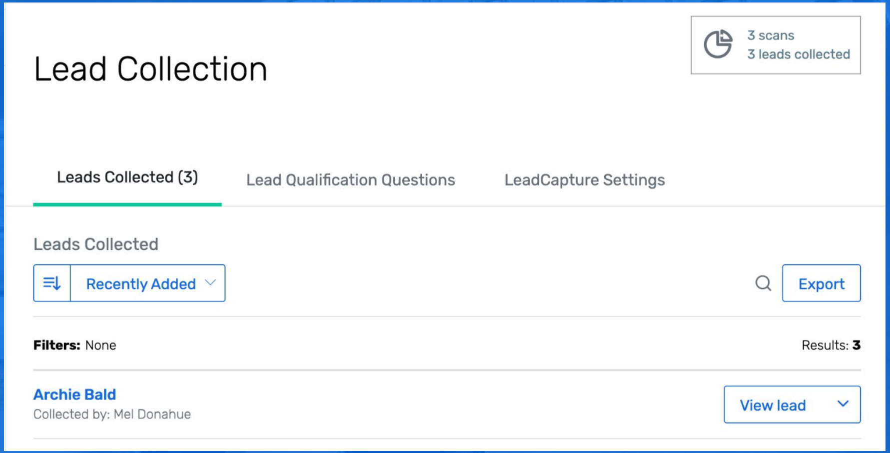




Best Practice: Minimize the number of required questions as this can slow down scanning onsite

Post Event: Access Your Collected Leads

1. To access your leads, go to the left-hand navigation menu and select **Lead Collection.**
2. Click on **Export** to generate a report of the attendee information shared.



Your leads will be available in real time through the Exhibitor Portal

Scanning LeadCapture Leads

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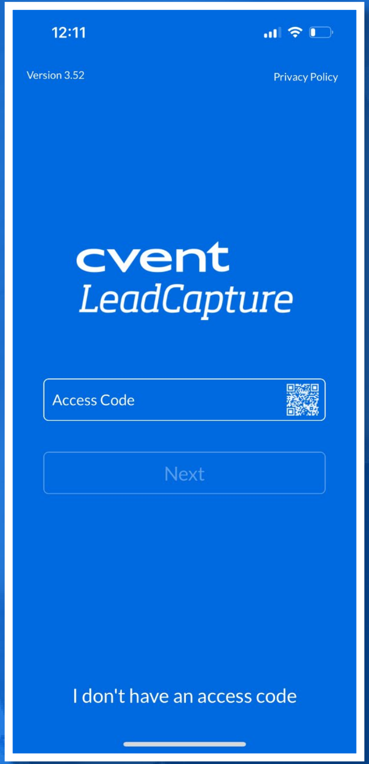
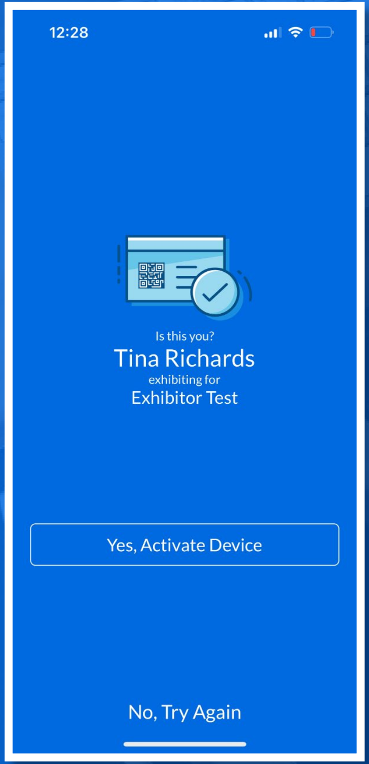
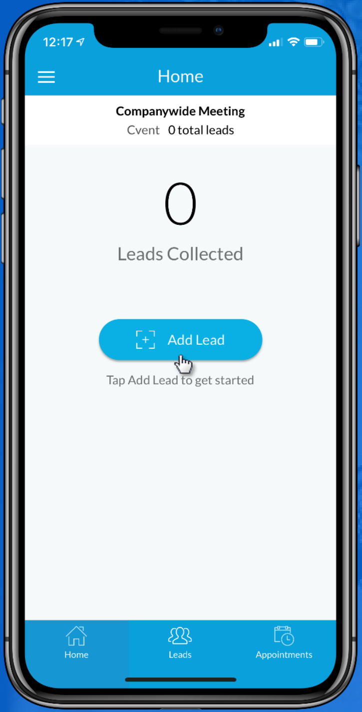
Logging into the LeadCapture App

In the LeadCapture app, enter your access code and tap **Yes, Activate Device**.

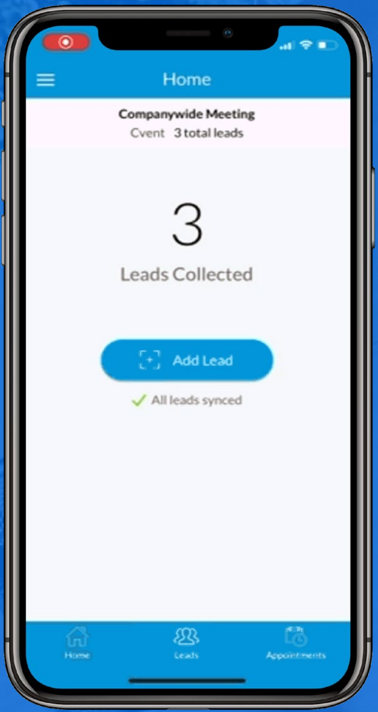




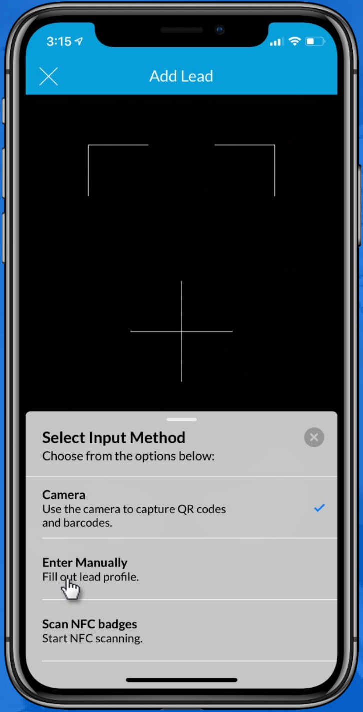
Scanning a Lead in the LeadCapture App



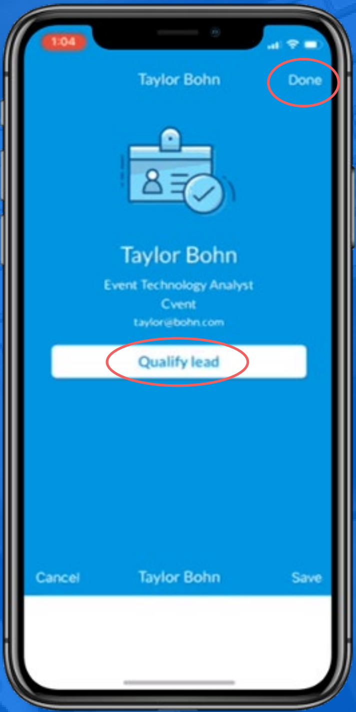
1. From the home page, select **Add Lead**



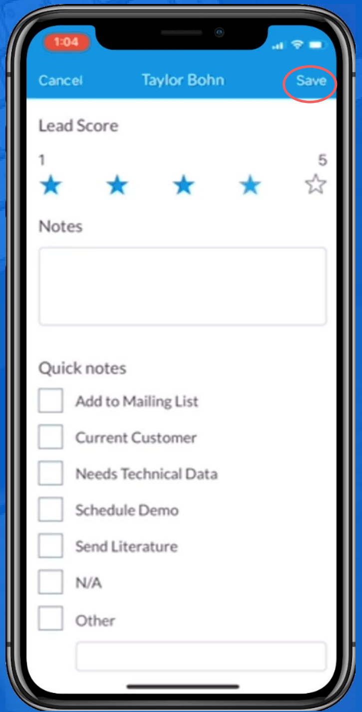
2. Scan QR Code



3. Tap **See more input options** to view alternative ways to add leads

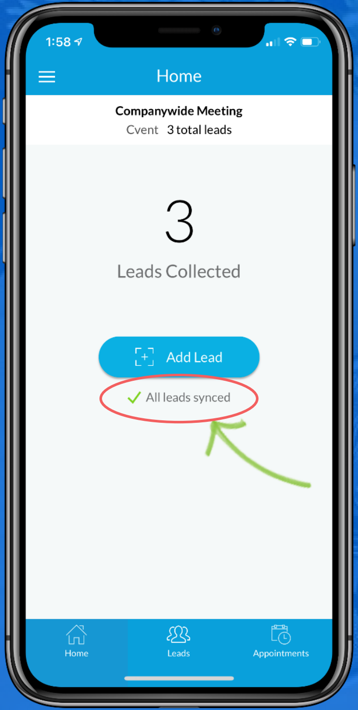


4. Tap **Qualify Lead** to enter the survey, or tap **Done** to save the lead

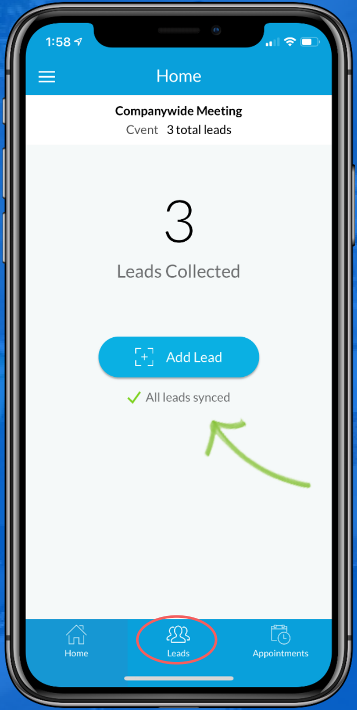


5. Tap **Save** once you've completed the survey to save the lead

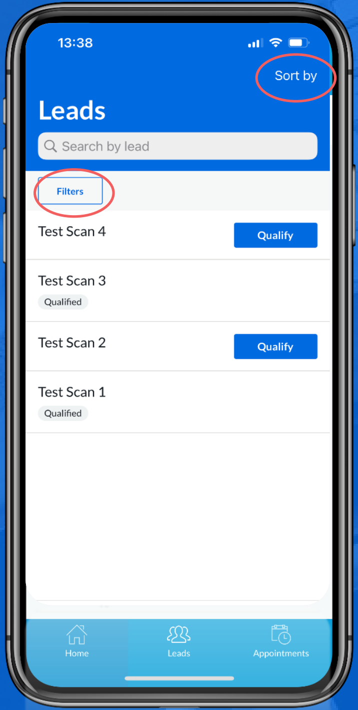
Syncing & Reviewing Leads in the LeadCapture App



1. Verify that the leads have synced by checking the home screen.



2. From the bottom navigation menu, select **Leads**



3. Your leads will appear in order of creation date. Tap **Sort by** or **Filters** to alter your view.

REMEMBER: You will only be able to see the leads you have scanned on that device.

Best Practices

Download the app ahead of time, but don't use the access code until the day you will be using the device. The code can only be used once, by one person and on one device.

Ensure your device is fully charged.

Ensure you have access to the Wi-Fi or Mobile Data. You will still be able to scan leads offline, but it will not sync with the system until back online.

Before logging out of the app, confirm all your leads have synced; otherwise, you will lose your leads.

AVAILABLE RESOURCES

Exhibitor Guides

- Using the Exhibitor Portal

LeadCapture App

- How do I download LeadCapture for an Android device?
- How do I download LeadCapture for an Apple device?
- Scanning LeadCapture leads
- Why aren’t my leads or attendees syncing?
- Adding Custom Questions in the LeadCapture Exhibitor Portal