# Exhibitor Training Guide

cvent

# Verbiage to Know

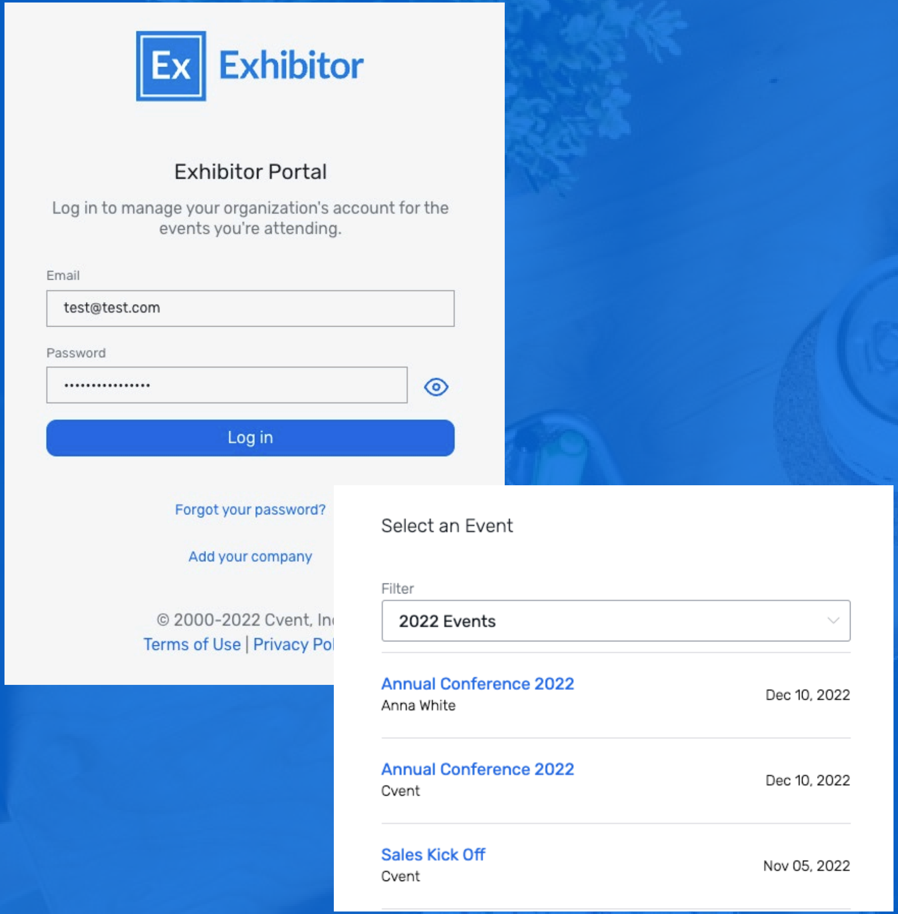
**LeadCapture App** – Cvent's lead retrieval app to scan and qualify leads onsite

**Exhibitor Admin-** Designated team members in charge of purchasing LeadCapture app licenses, assigning them to booth staff and downloading leads.

**Exhibitor Portal -** The platform where exhibitor admins can purchase and manage LeadCapture licenses by adding booth staff, accessing and assigning LeadCapture licenses, and exporting leads.

**Booth Staff -** Team members that will be onsite scanning leads and assigned any LeadCapture License Access Codes.

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

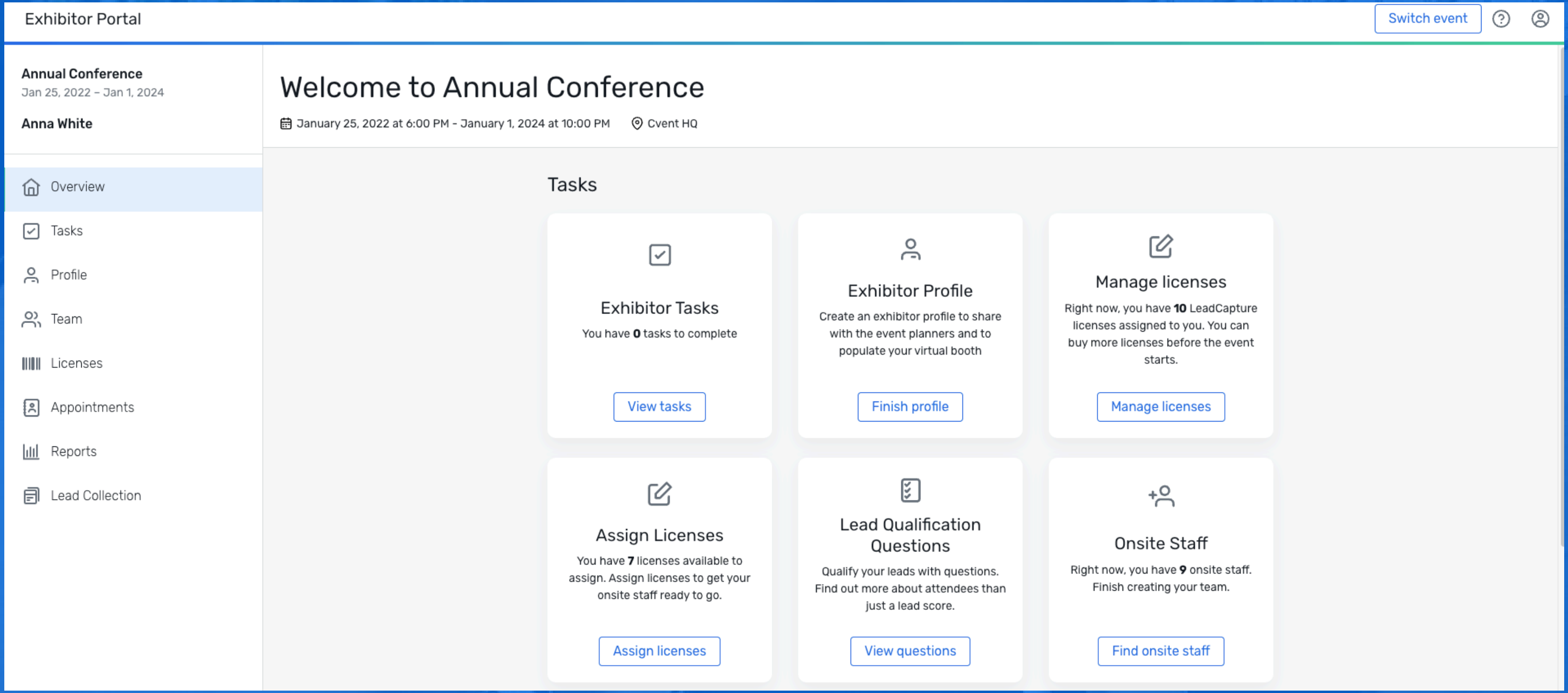



# Log in to the Exhibitor Portal

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.

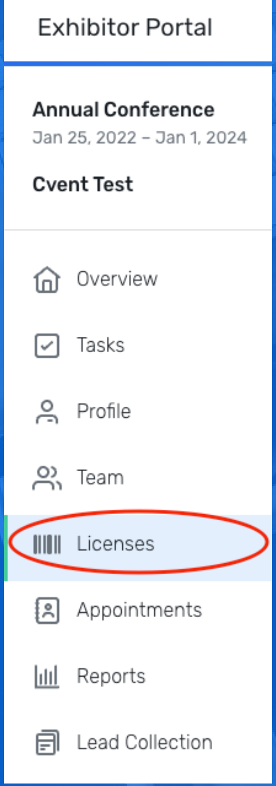
Once you've set your password, you'll use https://exhibitors.cvent.com/login for any future logins. Re-using the original link can cause duplicate exhibitor accounts.

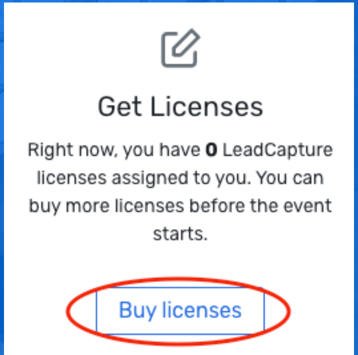
# Exhibitor Portal Homepage



# 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. Licenses: Confirm 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.



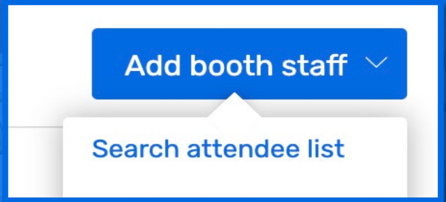




**REMEMBER – you will need one license per device. These cannot be re-assigned once consumed.**

# Pre-Event: Assign Booth Staff

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

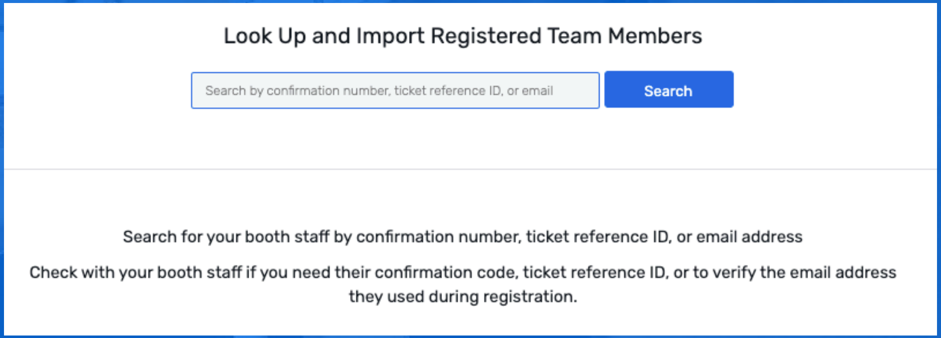
*Admin staff that plan on scanning leads onsite, must be registered as booth staff as well*




To add your Booth Staff, follow the below steps.

1. Click **Team** on left side
2. Click **Add Booth Staff.**
3. **Search attendee list**

   – Will only show people already registered for the event. Search by confirmation number or email.

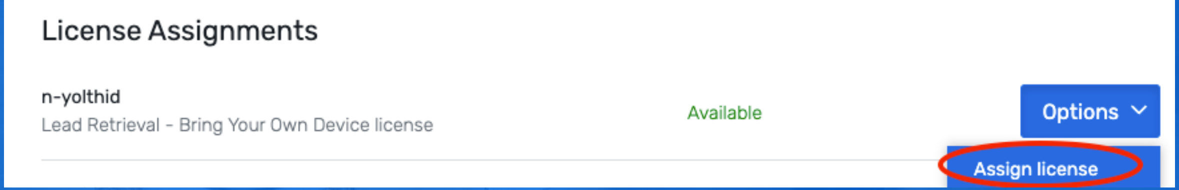



If you have additional staff members that need access to the Exhibitor Portal, you can add them on the Admin tab.

# 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

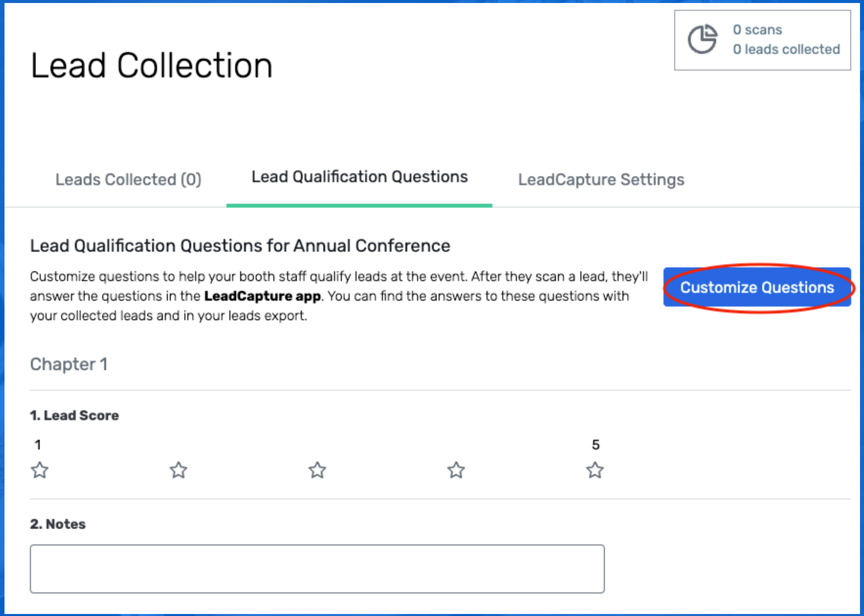


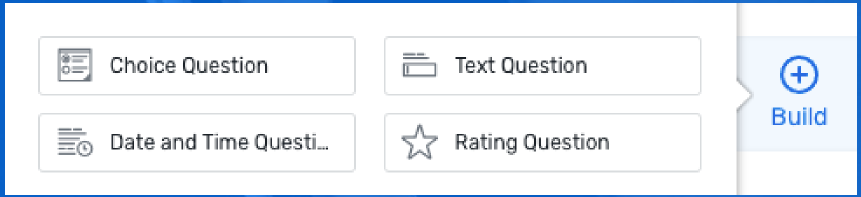

# Pre-Event: Customize Qualification Questions

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

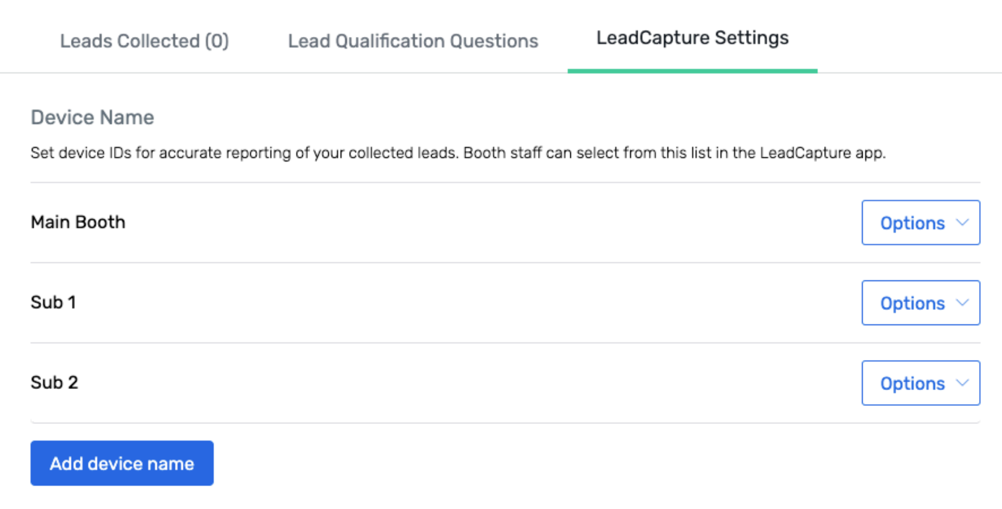


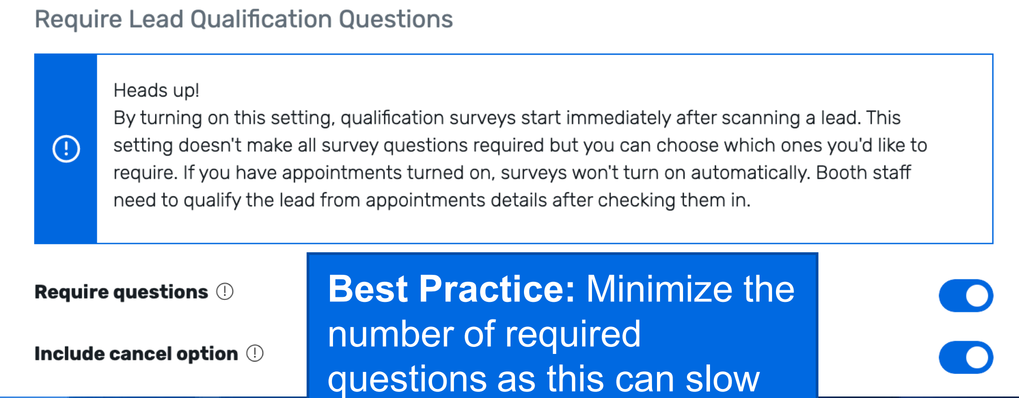



# Pre-Event: LeadCapture Settings

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

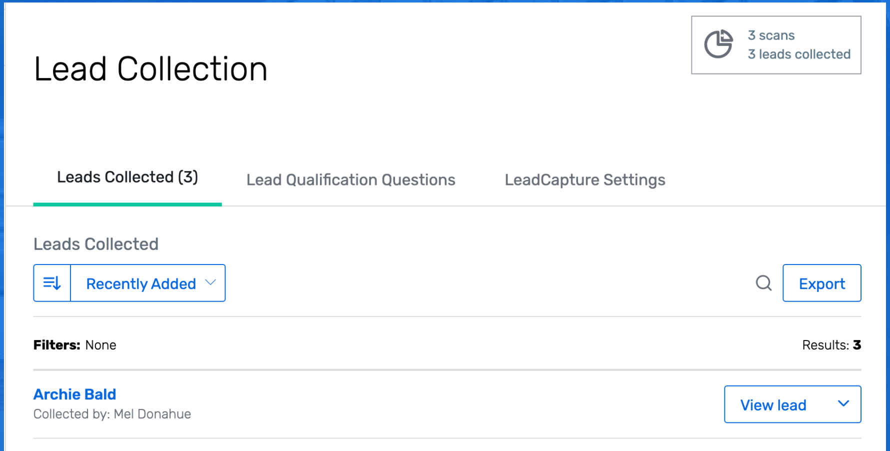



**Best Practice:** Minimize the number of required questions as this can slow down scanning onsite

# 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*

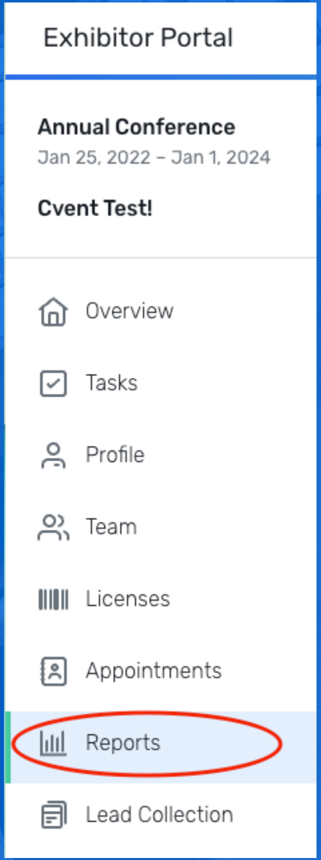
*Note: The attendee information shared on the lead report has been pre-set by the planner.*

# Post Event: Exhibitor Reports

Navigate to the "Reports" on the left-hand panel.

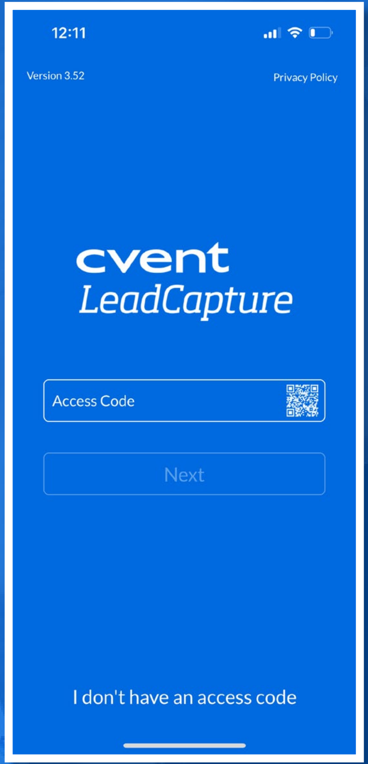
**Leads with Lead Qualifying Questions**

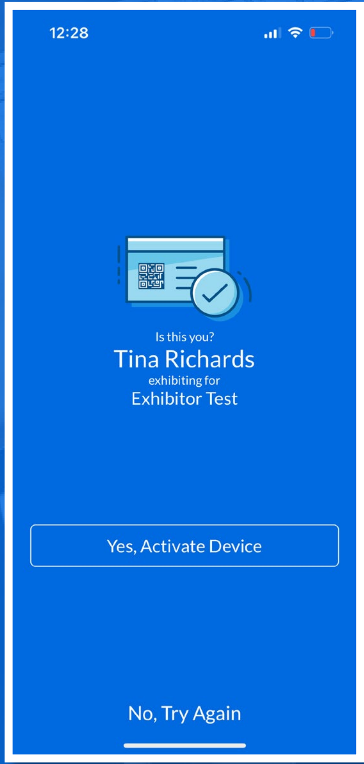
This report provides a list of attendees who engaged with your company, along with answers to your qualifying questions. Scanned leads will still appear in this report, even if they did not answer any qualifying questions.



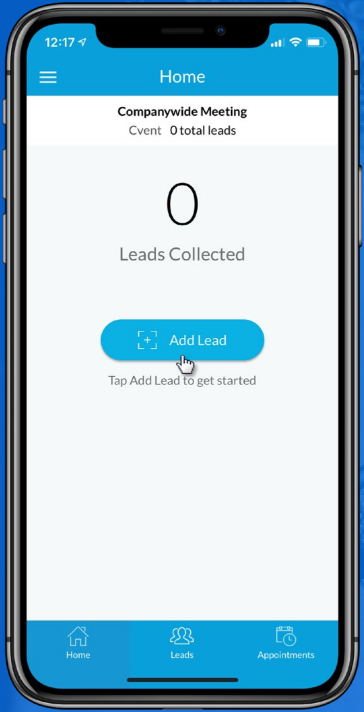
# Logging into the LeadCapture App

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

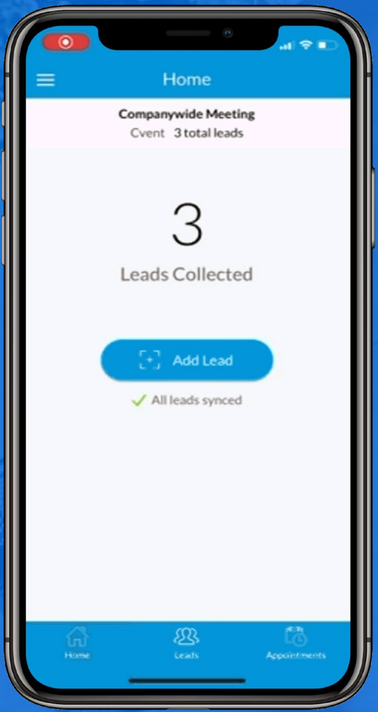


# Scanning a Lead in the LeadCapture App

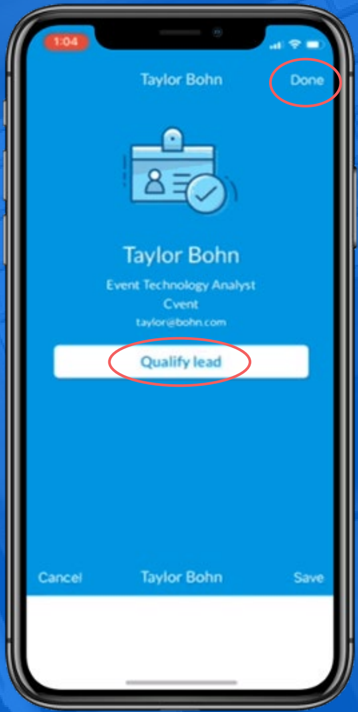



1. From the home page, select **Add Lead**

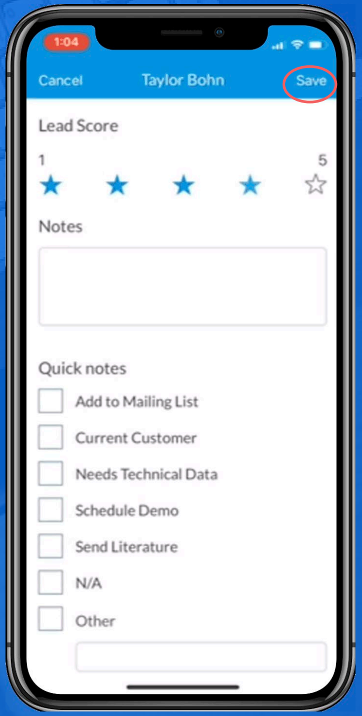



2. Scan QR Code


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

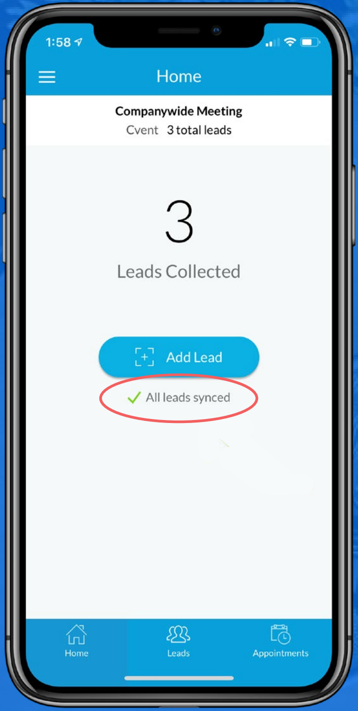



4. Tap **Qualify Lead** to enter the survey, or tap **Done** to save the lead

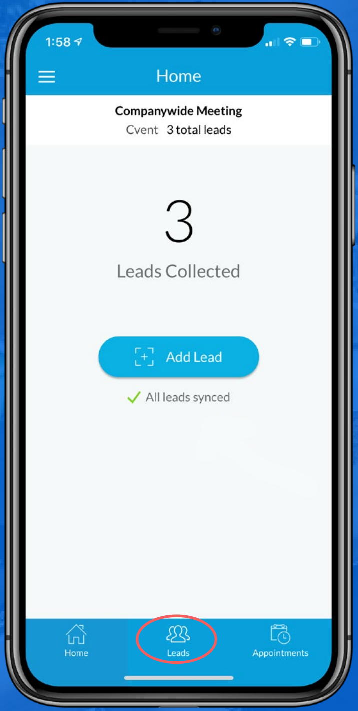



5. Tap **Save** once you've completed the survey to save the lead

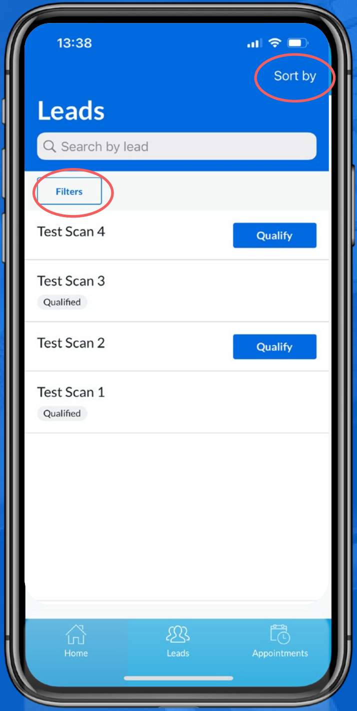
# Syncing & Reviewing Leads in the LeadCapture App




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.