



# Exhibitor Training Guide

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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.



## Exhibitor Portal

Log in to manage your organization's account for the events you're attending.

Email

test@test.com

Password

.....



Log in

[Forgot your password?](#)

[Add your company](#)

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### Select an Event

Filter

2022 Events

[Annual Conference 2022](#)

Anna White

Dec 10, 2022

[Annual Conference 2022](#)

Cvent

Dec 10, 2022

[Sales Kick Off](#)

Cvent

Nov 05, 2022

# 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

Exhibitor Portal Switch event ? 👤

**Annual Conference**  
Jan 25, 2022 – Jan 1, 2024

**Anna White**  
📅 January 25, 2022 at 6:00 PM - January 1, 2024 at 10:00 PM 📍 Cvent HQ

🏠 Overview

☑ Tasks

👤 Profile

👥 Team

|||| Licenses

📅 Appointments

📊 Reports

📁 Lead Collection

## Welcome to Annual Conference

### Tasks

☑

#### Exhibitor Tasks

You have **0** tasks to complete

[View tasks](#)

👤

#### Exhibitor Profile

Create an exhibitor profile to share with the event planners and to populate your virtual booth

[Finish profile](#)

✍

#### Manage licenses

Right now, you have **10** LeadCapture licenses assigned to you. You can buy more licenses before the event starts.

[Manage licenses](#)

✍

#### Assign Licenses

You have **7** licenses available to assign. Assign licenses to get your onsite staff ready to go.

[Assign licenses](#)

📄

#### Lead Qualification Questions

Qualify your leads with questions. Find out more about attendees than just a lead score.

[View questions](#)

+👤

#### Onsite Staff

Right now, you have **9** onsite staff. Finish creating your team.

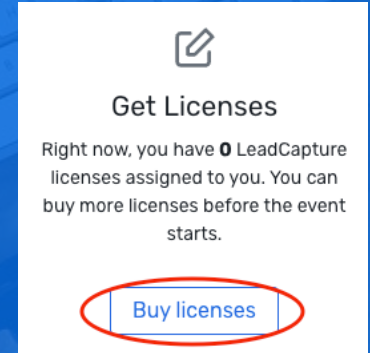
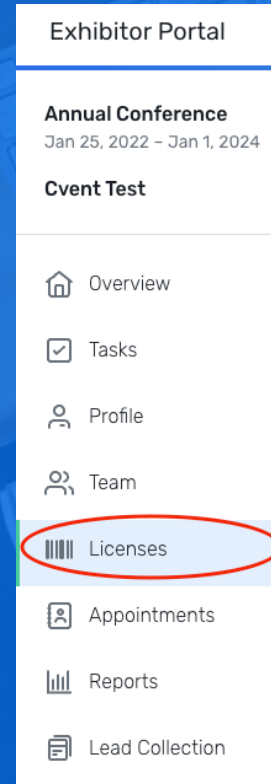
[Find onsite staff](#)

4



# 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.*

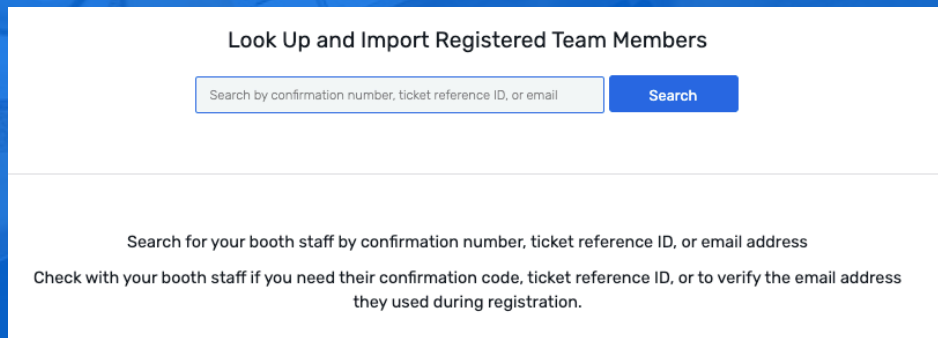
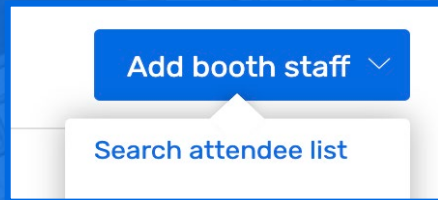
*Admin staff that plan on scanning leads onsite, must be registered as booth staff as well*

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




**License Assignments**

n-yolthid Available

Lead Retrieval - Bring Your Own Device license

Options ▾

Assign license



Assign License n-yolthid  
to:

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**Kim Jones**  
kjones@test.com



# 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

The screenshot shows the 'Lead Collection' interface. At the top right, there is a status box with a pie chart icon and the text '0 scans' and '0 leads collected'. Below this, there are three tabs: 'Leads Collected (0)', 'Lead Qualification Questions' (which is selected and highlighted with a green underline), and 'LeadCapture Settings'. The main content area is titled 'Lead Qualification Questions for Annual Conference'. Below the title, there is a paragraph of text: 'Customize questions to help your booth staff qualify leads at the event. After they scan a lead, they'll answer the questions in the **LeadCapture app**. You can find the answers to these questions with your collected leads and in your leads export.' To the right of this text is a blue button with a white border and the text 'Customize Questions', which is circled in red. Below the text, there is a section titled 'Chapter 1'. Underneath, there is a section titled '1. Lead Score'. Below this, there is a row of five stars. The first star is filled, and the others are empty. To the right of the stars, the number '5' is displayed. Below the stars, there is a section titled '2. Notes'. Below this, there is a large empty text input field.

The screenshot shows the question type selection interface. It features four buttons arranged in a 2x2 grid. The top-left button is labeled 'Choice Question' and has a list icon. The top-right button is labeled 'Text Question' and has a document icon. The bottom-left button is labeled 'Date and Time Questi...' and has a calendar icon. The bottom-right button is labeled 'Rating Question' and has a star icon. To the right of these buttons is a vertical button labeled 'Build' with a plus sign icon.



# 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

Leads Collected (0)    Lead Qualification Questions    **LeadCapture Settings**

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**Device Name**  
Set device IDs for accurate reporting of your collected leads. Booth staff can select from this list in the LeadCapture app.

Main Booth Options ▾

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Sub 1 Options ▾

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Sub 2 Options ▾

[Add device name](#)

**Require Lead Qualification Questions**

**Heads up!**  
By turning on this setting, qualification surveys start immediately after scanning a lead. This setting doesn't make all survey questions required but you can choose which ones you'd like to require. If you have appointments turned on, surveys won't turn on automatically. Booth staff need to qualify the lead from appointments details after checking them in.

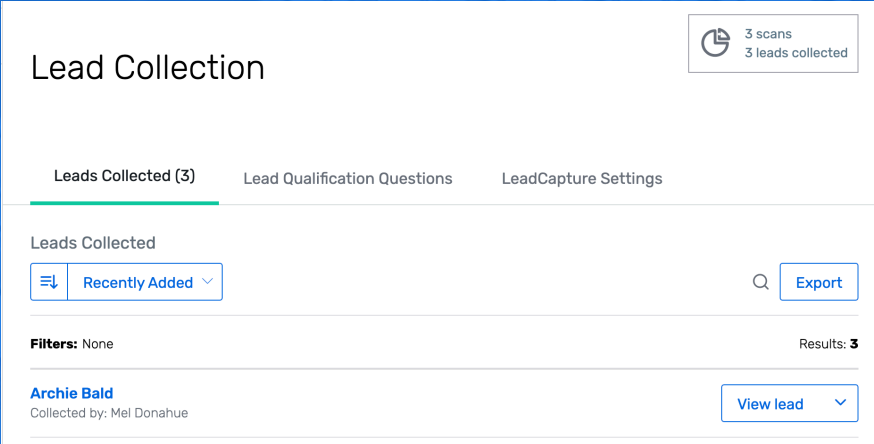
**Require questions** ⓘ

**Include cancel option** ⓘ

**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.



The screenshot displays the 'Lead Collection' interface. At the top right, a summary box shows '3 scans' and '3 leads collected'. Below this, there are three tabs: 'Leads Collected (3)', 'Lead Qualification Questions', and 'LeadCapture Settings'. The 'Leads Collected' tab is active. Underneath, there is a search bar with a magnifying glass icon and an 'Export' button. Below the search bar, it says 'Filters: None' and 'Results: 3'. A lead entry for 'Archie Bald' is shown, with 'Collected by: Mel Donahue' and a 'View lead' button with a dropdown arrow.

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

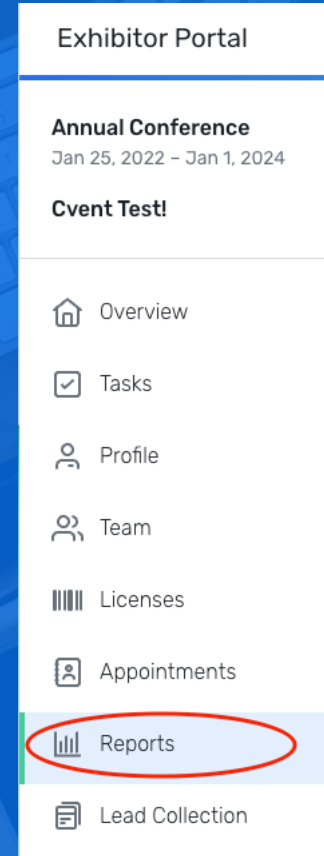
*Note: The attendee information shared on the lead report has been pre-set by the planner.*

# Post Event: Exhibitor Reports

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

## Leads with Lead Qualifying Questions

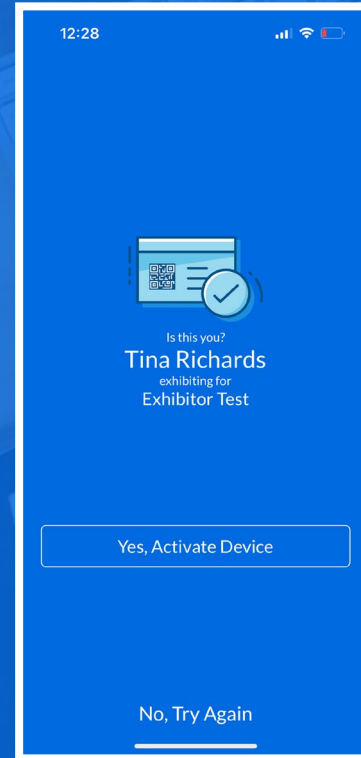
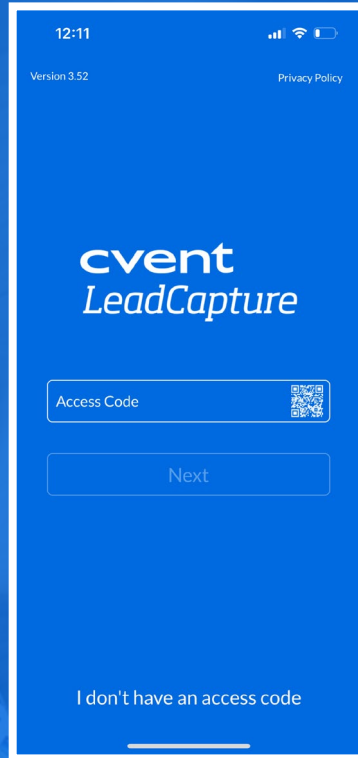
This report provides a list of attendees who engaged with your company, along with answers to your qualifying questions. Scanned leads will still appear in this report, even if they did not answer any qualifying questions.



The screenshot shows a vertical navigation menu for the Exhibitor Portal. At the top, it says "Exhibitor Portal". Below that, it displays "Annual Conference" with the dates "Jan 25, 2022 - Jan 1, 2024". Underneath is "Cvent Test!". The menu items are: Overview (house icon), Tasks (checkbox icon), Profile (person icon), Team (group of people icon), Licenses (vertical bars icon), Appointments (calendar icon), Reports (bar chart icon, circled in red), and Lead Collection (document icon).

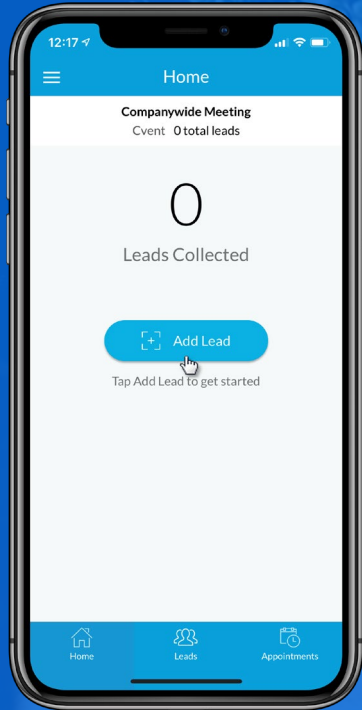
# Logging into the LeadCapture App

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

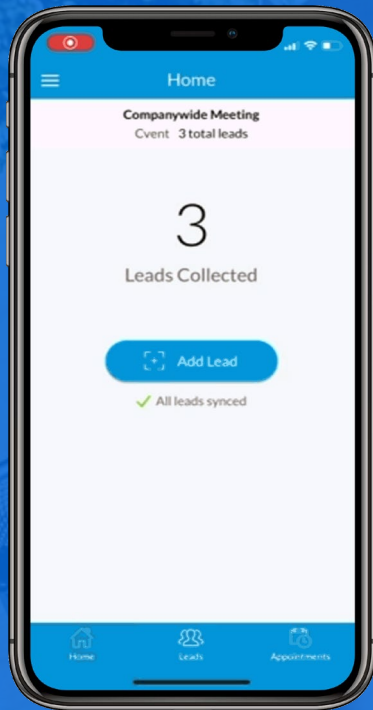




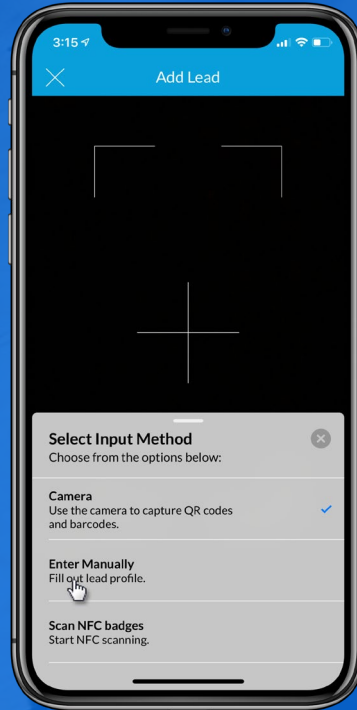
# Scanning a Lead in the LeadCapture App



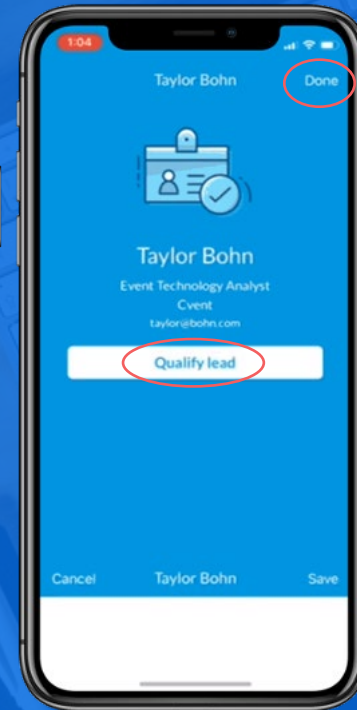
1. From the home page, select **Add Lead**



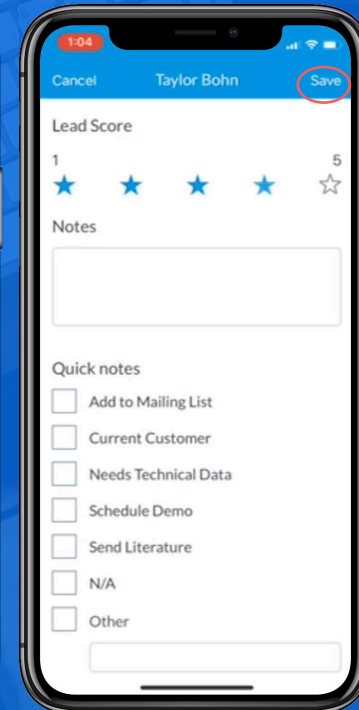
2. Scan QR Code



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

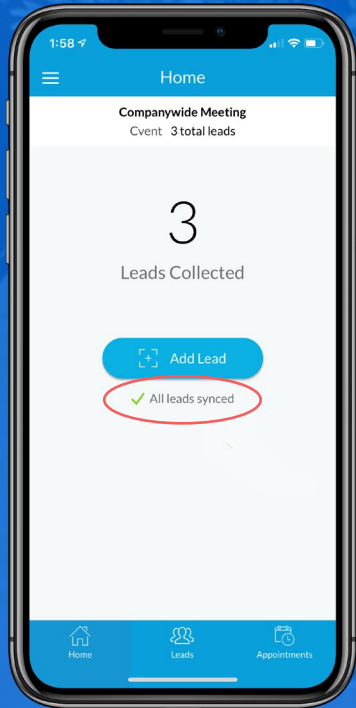


4. Tap **Qualify Lead** to enter the survey, or tap **Done** to save the lead

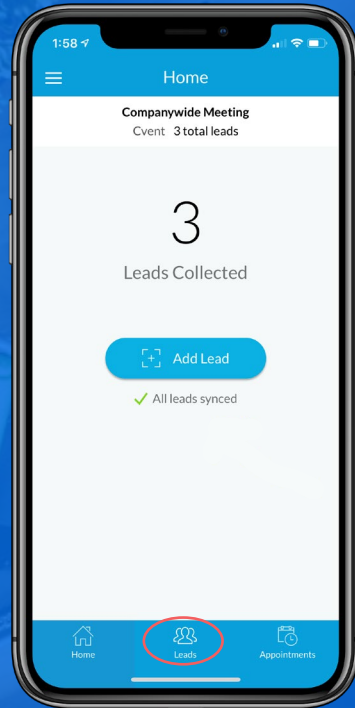


5. Tap **Save** once you've completed the survey to save the lead

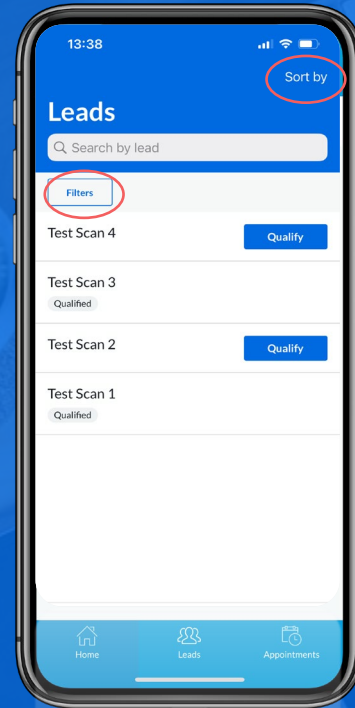
# Syncing & Reviewing Leads in the LeadCapture App



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.