

Converge+ Lead Retrieval User Guide – Scanning



Shortened version

1. Scan badge or business card

4:55

Capture Contact Details

SCAN BADGE

SCAN BUSINESS CARD

ENTER MANUALLY

SKIP AND ADD LATER

2. See live insights as you have the conversations

4:56

Live Conversation with Gina Nolan

Tap to pause recording...

Live Insights

- Bicycles Plus offers a wide variety of bicycle accessories including bells, tassels, light reflectors, and seats in multiple colors.
- Bicycles Plus emphasizes customization and choice, catering to diverse customer preferences for bicycle appearance and functionality.
- Bicycles Plus is attracting large-scale buyers interested in purchasing a diverse range of 600 bicycles, including tricycles and electric *mountain*

END CONVERSATION

Powered by SYNOPSIS

3. See your summary after conversation is completed

4:57

Summary of Conversation

Key Points Products Discussed Action Items

- children's bicycles
- adults' bicycles
- tassels for handlebars
- bells
- lights
- reflectors

Add your comments

PROCEED

SKIP

4. See lead details and send follow-ups

4:58

Lead Details - Sarah Nolan

Name	Email
Sarah Nolan	gina.nolan@clarionevents.com
Phone	Company
7818207464	Clarion
Job Title	
SPM	

Live Insights

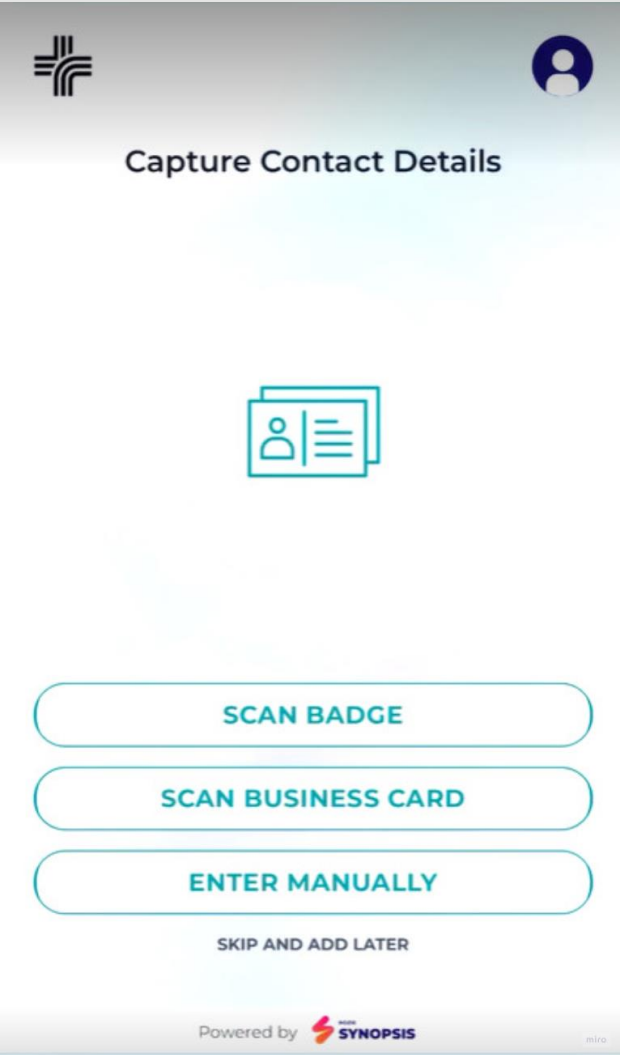
SEND EMAIL

SAVE

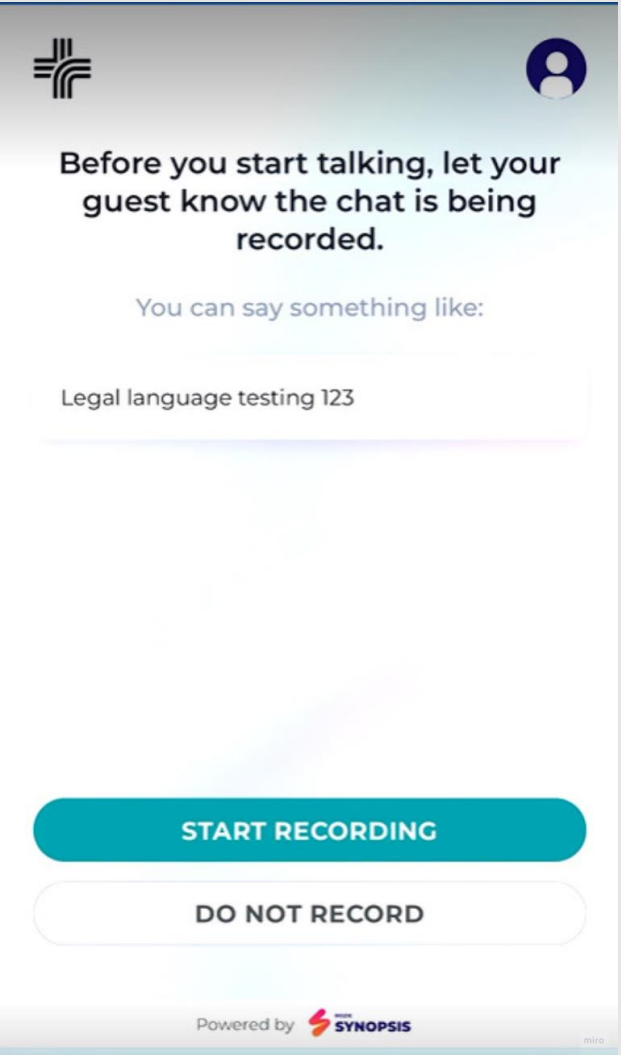
Powered by SYNOPSIS

Longer Version

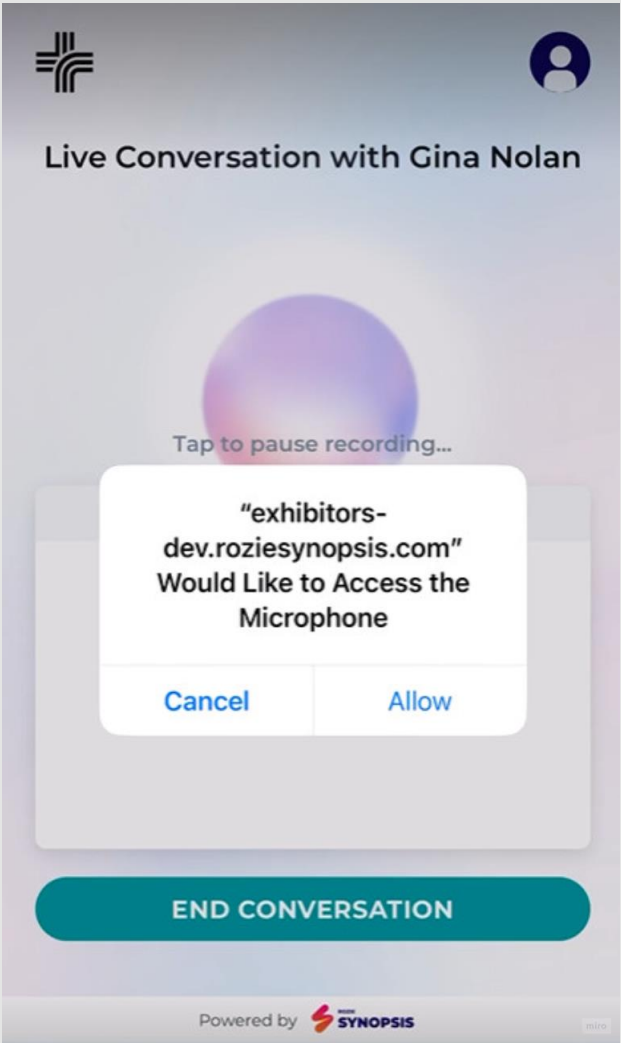
From the home screen, select scan method



Inform attendee that conversation will be recorded. *Note, if attendee refuses, stay here and you can record a voice note when they walk away



Allow microphone access



Begin conversation and see live insights start to populate



Live Conversation with Gina Nolan



Tap to pause recording...

Live Insights

- Bicycles Plus offers a wide variety of bicycle accessories including bells, tassels, light reflectors, and seats in multiple colors.
- Bicycles Plus emphasizes customization and choice, catering to diverse customer preferences for bicycle appearance and functionality.

END CONVERSATION

Powered by  SYNOPSIS 

Once you end conversation, you can see key points, products discussed, and any discussed action items.



Summary of Conversation

Key Points	Products Discussed	Action Items
- Gina is interested in purchasing 600 bicycles of various types (tricycles, bicycles, electric bicycles, children's and adults' bicycles) from Rachel at Bicycles Plus. - Gina inquired about bicycle accessories, and Rachel confirmed that Bicycles Plus sells a variety of accessories (tassels, bells, lights, reflectors, etc.). - Gina confirmed an initial order of 200 bicycles. - A follow-up call is scheduled for Tuesday at 3:00		

Add your comments

PROCEED

SKIP

See details of the scanned lead and edit any as needed



Lead Details - Gina Nolan



Name Gina Nolan	Email gina.nolan@clarionev ents.com
Phone 7818207464	Company Clarion
Job Title SPM	

Live Insights 

PREVIOUS

SAVE

Powered by  SYNOPSIS 

Congrats! You've successfully recorded your lead. You can now start a new conversation, return home, or send follow up emails.



New lead successfully recorded



START NEW CONVERSATION

RETURN TO HOME

Powered by  SYNOPSIS 