Lead Capture

How to use lead capture?

swapcard

All-In-One Event & Community Platform

Grow your Events into a Community

TABLE OF CONTENTS

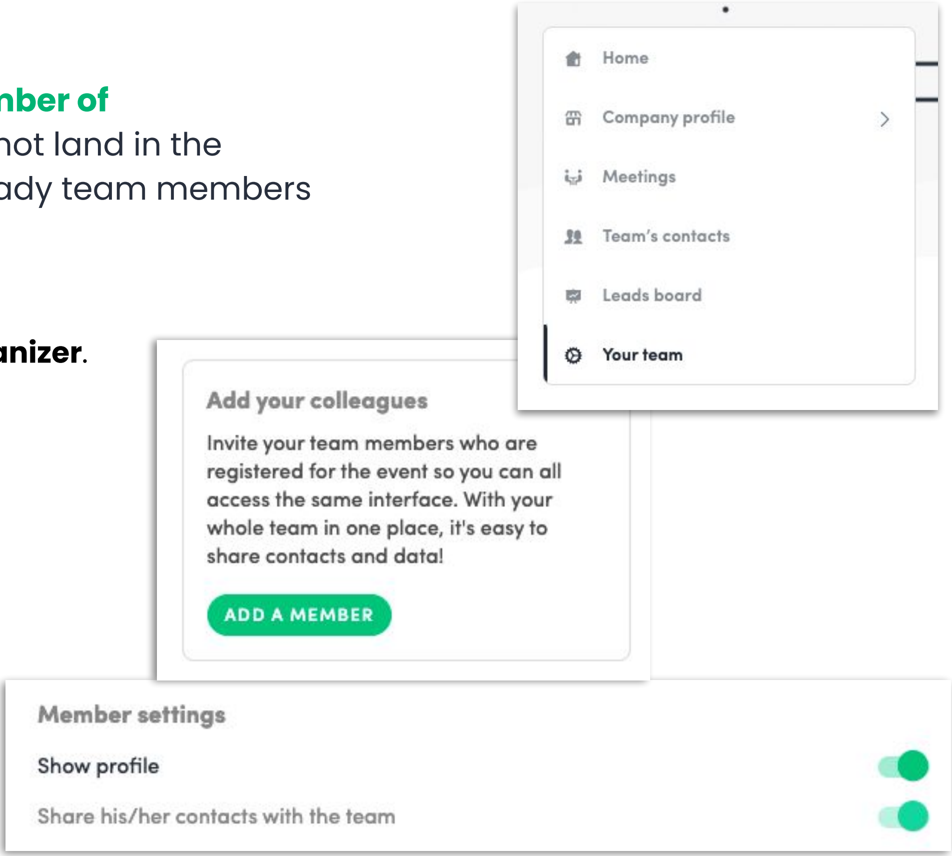
- Before lead scanning
- How to lead scan
- What to lead scan
- How to use the leads board
- How to export the leads
- How to use the leads export

Before lead scanning

Before scanning, **make sure you are a team member of an exhibitor booth**. If you are not, your leads will not land in the team's contact list. Your colleagues who are already team members can add you as a member from **"Your team"** in the **Exhibitor Center** (team.swapcard.com).

Note: If this option is not there, **contact the event organizer**.

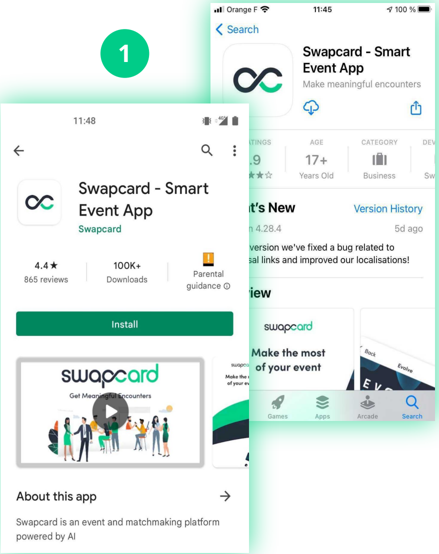
Make sure that **contact sharing is on**. Go to **"Your team"** and click to share your contacts with the team.
Only the person currently logged in can toggle this on/off.

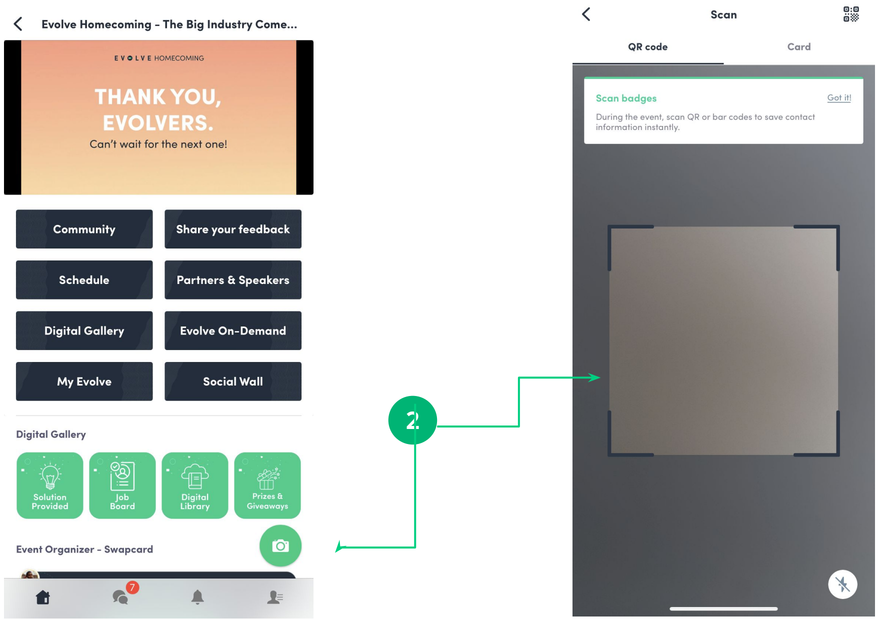


How to lead scan?

swapcard

1 Download the Swapcard app for **iOS** or **Android**
Note: the organizer may have their own app you can use instead, usually searchable by event name. If you are
unsure about which app to use, contact the event organizer.



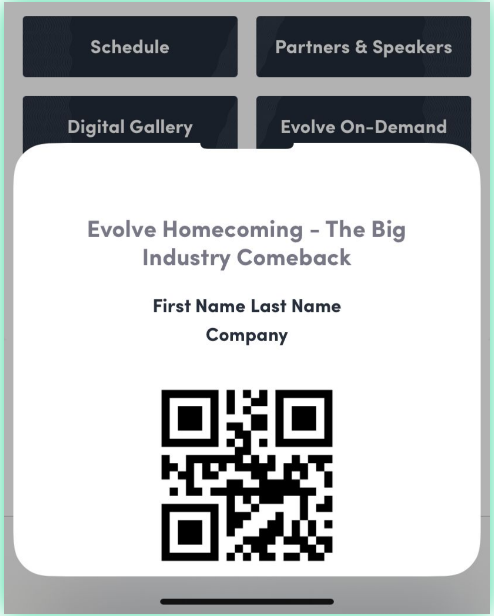


2 Login and click the **camera icon on the bottom right.** This opens up a QR code/barcode **scanner**.

What to lead scan?

swapcard

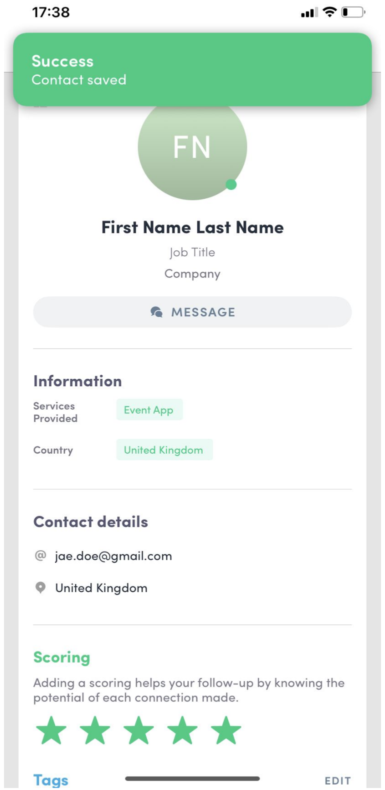
There are generally two options, depending on what the organizer decides to do:



1. Scan the QR code or barcode on a printed badge
2. Scan the QR code or barcode from the Swapcard or Event app:

Note: Organizers often add a button on the event homepage that attendees can use to open their QR code or barcodes for scanning. This is usually called “**Event Ticket**,” “**My Badge**,” “**QR code**,” or similar.

Options after scanning



1

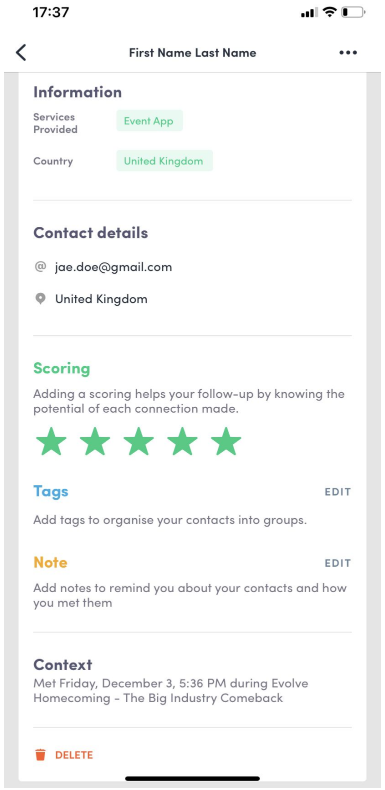
A pop-up will tell you
if the scan was successful.

2

Scanning will automatically create a connection between you and the person you scan. They will then land in your own contact list as well as the team's contact list.

3

You can then add details about this lead. You have the option to **score, tag, add a note,** and **delete** the contact, as well as view the **context of the connection**.

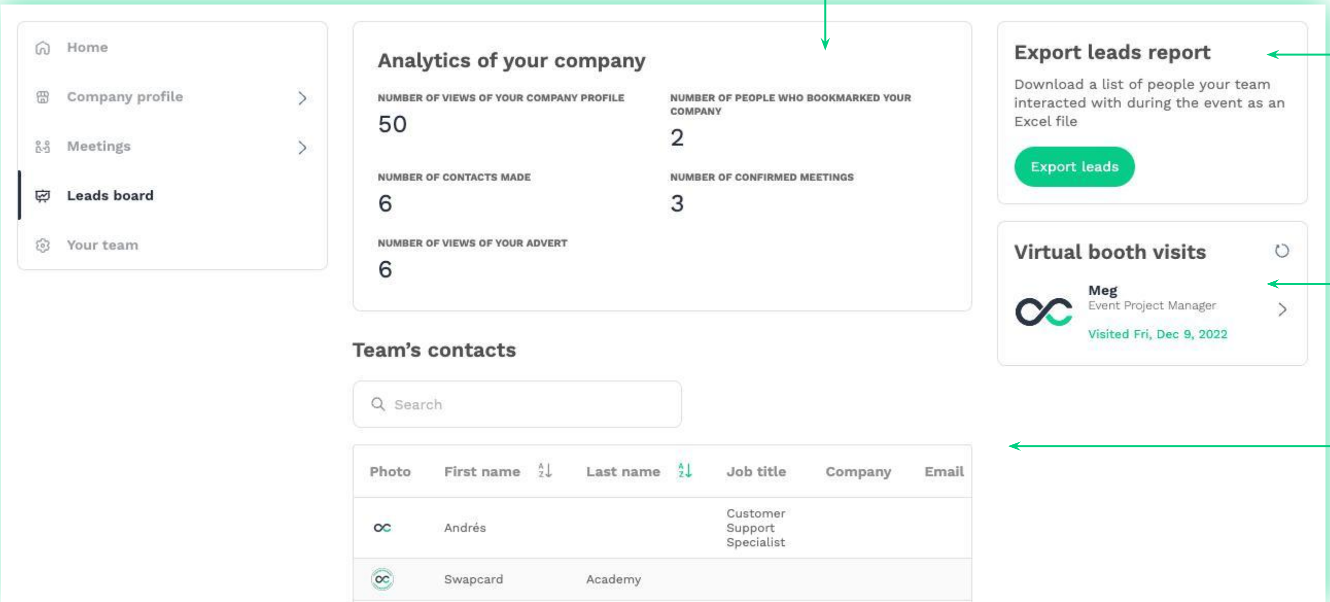


Leads board

You can easily manage your leads and at the **Leads board**, in the **Exhibitor Center** (team.swapcard.com).

Note: Not all of these features may be available for your company. Please **confirm with the organizer which ones are available** according to your category of participation.

Check some statistics about your company's booth and your team's activity



Download an Excel with the list of people your team interacted with.

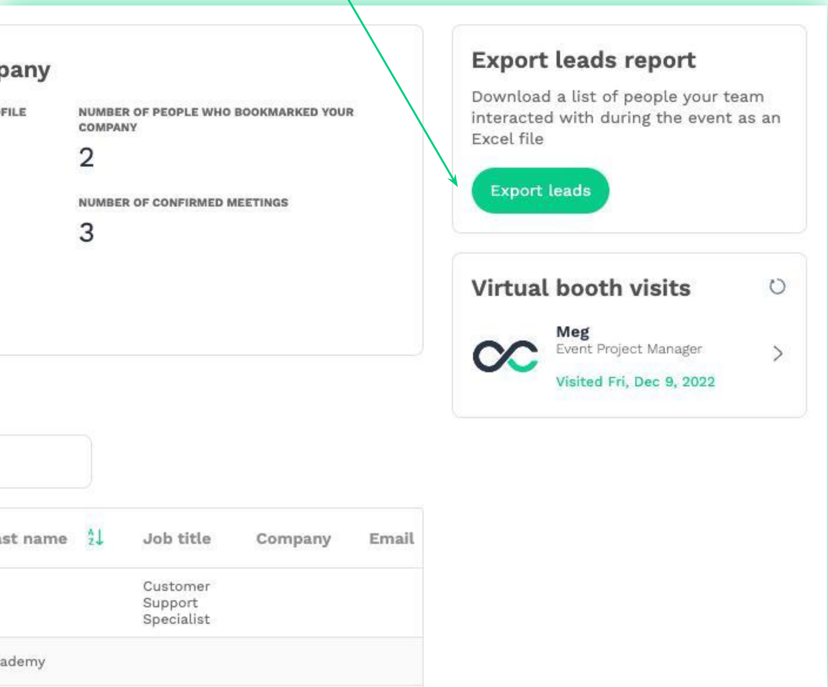
List of people who view your company's virtual booth.

Table with the contacts made by your fellow team members.

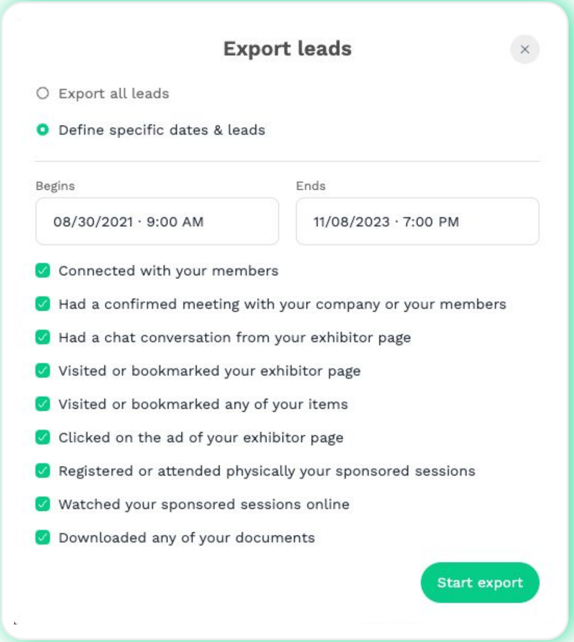
How to export the leads

You can easily download your leads from your computer accessing the **Leads board**, in the **Exhibitor Center**.

1. Click on the **Export leads** button on the top right corner.



2. Select whether you want to export all leads or to filter them by date and/or lead type.



Note: Not all of these filters may be available for your company. Please **confirm with the organizer which ones are available** according to your category of participation.

Leads Excel export

swapcard

Different tabs with the leads will show up in the exported **Excel file** depending on the permissions/filters available according to your participation in the event:

- **Contacts**: The list of people that connected with exhibitor members.
- **Meeting confirmed**: The list of people who had a meeting with the exhibitor or its members.
- **Chat**: The list of people who had a chat with the exhibitor in the exhibitor booth.
- **Booth**: The list of people who visited or bookmarked the exhibitor booth.
- **Product**: The list of people who visited or bookmarked the exhibitor items.
- **Document**: The list of people who visited or bookmarked the exhibitor documents.
- **Advertisement**: The list of people who viewed and clicked on the ad on the exhibitor page.
- **Session bookmarks**: The list of people who registered or physically attended the sponsored sessions.
- **Session viewer**: The list of people who watched the sponsored sessions online.

Thank you for taking the time to read this presentation.

If needed, you can fill out this **quick form** and our **support team** will get in touch: https://help-attendees.swapcard.com

swapcard