

Web Portal

Pre-Event activities

There are a number of activities that you should carry out before the event begins.

Set up an Exhibitor Account

Click on the link in your order confirmation mail. If you are a new user you can create a new exhibitor account. If you have used Visit Connect at another event you can choose to add this new event to your existing exhibitor account.

Login

Subsequent logins take place at <https://visitconnect.n200.com>

Set targets

Visit Connect allows you to specify targets for the number of leads you plan to generate during the event. You can then use the built-in analysis to monitor your performance and identify trends.

- ▶ Click **Set targets**
- ▶ Double-click to select a day
- ▶ Enter values for Target, Moderate Performance and Minimum Performance
- ▶ Click **Save**

Add Questions

You can add your own questions and answers. These are available across all of your events. They default to Enabled for the current event and Disabled for all other events. When a question is disabled for an event (either because it was created in another event or it's status has been changed), it still shows in the list but is greyed out. To use the question in the selected event, select it and change the **Status** to Enabled.

- ▶ Select **Manage questions**

- ▶ Click **Add Question**
- ▶ Enter your question
- ▶ Select the status
- ▶ Select the answer **type**
 - ▶ Free text – this gives the lead the opportunity to give any answer
 - ▶ Single choice – this displays radio buttons, of which only one can be selected
 - ▶ Multiple choice – this displays check boxes, of which more than one can be selected
 - ▶ Drop-down list – this displays a list when clicked, of which only one can be selected
- ▶ Enter your answers



- ▶ If you have a lot of answers for a single- or multiple-choice question you can define in how many columns the answers should be displayed by selecting 1-4 in **Columns**
- ▶ You can add the ability to add additional text next to an answer by clicking  and then selecting 'Other' field
- ▶ You can change the display sort order by clicking the arrows  
- ▶ You can delete an answer by clicking 
- ▶ Click **Save**

Answers

Scan App

If you collect Leads using the app, the answers are recorded by selecting the Lead and then **Questions**. More details are in the scan app section.

Barcode Scanners

If you are using Barcode Scanners to scan visitor badges you must generate a barcode sheet with your questions and answers.

- ▶ Select **Manage questions**
- ▶ Click **Download barcodes pdf**
- ▶ Print the file to take it with you to the event.



Users

Once an Admin account has been created (using the link sent in an email), that account can create as many user accounts as they want. One user account should be created for each user that will be scanning Leads using the Scan App. There are two different levels, Normal and Admin. The Normal users can do everything that the Admin can except User and Licence management

Assign Licences

If using the Scan App, Admin users need to assign Scan App licences to users. Only once a Scan App licence

has been assigned to a user account, can that account use the app. To assign a licence to a user

- ▶ Select **Manage users and licences**
- ▶ Select a user
- ▶ Click **Assign licence**. Note that this option is only available if there are licences available to be assigned.
- ▶ A key icon  appears next to each user who has a licence assigned

When the user logs in to a mobile device for the first time, the licence is then permanently assigned to that device and cannot be used on a different device. When that happens the licence icon is shown as .

You can remove the licence from one user and assign it to another whilst it is in 'assigned' status . Once it has been linked to a device it cannot be assigned to another user or device. .

If you are only using Barcode Scanners you do not need to assign licences.

Ready to go?

- Created users, if needed?
- Set up questions and answers?
- If using barcode scanners, printed out the questions and answers pdf?
- If using the scan app, download the app. Search in the App Store or Google Play for **N200 Visit Connect**. iOS 6.0/Android 2.2 and higher are supported.
- Defined your daily targets?

During-event activities

During an Event you can view the lead information collected, monitor your performance, and add or edit questions.

Scan Leads

You can scan leads one of two ways;

■ **Scan app** can be downloaded to a mobile device to scan the leads and record their answers

To scan using the app;

- ▶ Scan the QR code on the Visitors badge
- ▶ Select **Questions**, select each question and enter the answer(s). See next page for more details.

■ **Barcode scanners** are used to scan Visitor badges and then scan their answers to questions (on the sheet you printed out)

To scan using a Barcode Scanner;

- ▶ Ensure that the barcode pdf is printed (see Answers on previous page)
- ▶ Scan the 1D barcode on the Visitor's badge
- ▶ Scan the answers as required

You do not have to take any special action when finished. The last scanned Lead remains active until you scan the badge of another Lead or hand the scanner in, at which point the collected data is automatically uploaded

The number of answers possible is indicated by an icon after the question ;

- One answer only
- More than one answer possible

If more than one answer is scanned for questions where only one is permitted, only the last answer is recorded. For questions where multiple answers are permitted, all scanned answers are recorded.

Browse Leads

In the web portal, the **Browse leads** option on the left-hand side displays a full listing of collected leads from all associated mobile devices (app) and barcode scanners.

Search Leads

You can search for leads using either the **Search** box or the **Advanced Search** option.

- ▶ Search option – searches on First Name and Last Name
- ▶ Advanced search – search on the stage the lead is at, the dates it was collected and the Company

Edit Leads

You can view a Lead's details by double-clicking on them. Double-click again to edit their details.

By selecting an option from the top you can edit various details;

- **Contact** allows editing of their contact details
- **Your questions** allows you to edit the answers given to your own questions
- **Stage** set the stage the lead is at within the process

Move to next stage

- Stage:
- New
 - Contacted
 - Active Opportunity
 - Quoted
 - Sold
 - Inactive
 - Long Term Opportunity

■ **Registration Questions** allows you to edit the answers given during the registration process. Note: once you have changed the answer, the original answer is overwritten!

■ **Notes** allows you to add some notes to the Leads record

Export Leads

From the Leads listing you can choose **Export**. This exports all Leads with their Contact information, and the answers to both Your Questions and Registration Questions to an Excel file.

Edit Questions

You can add and edit questions and answers at any time. Be aware however that, if you have already started collecting answers from Leads, these will be overwritten with the new values you enter.

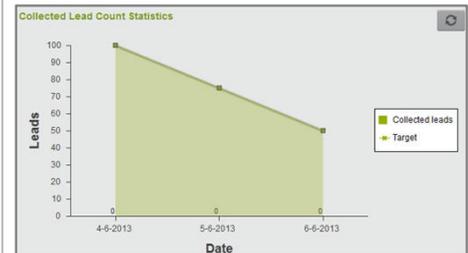
To edit a question;

- ▶ Select **Manage question**
- ▶ Either click **Edit** or hover over a question and select the Edit icon
- ▶ Make the change required
- ▶ Click **Save**

Monitor performance

You can view the number of leads collected against the target you set by selecting **View statistics**.

Important – click the Refresh icon on the stop right to get the latest information



This shows you the number of leads collected on each day of the event and compares it to the targets you set.

Log off

Log off by clicking on your user name and selecting **Log Off**

After the Event

All your leads are available to view/edit/export.

Scan App for Mobile Devices

Scan leads

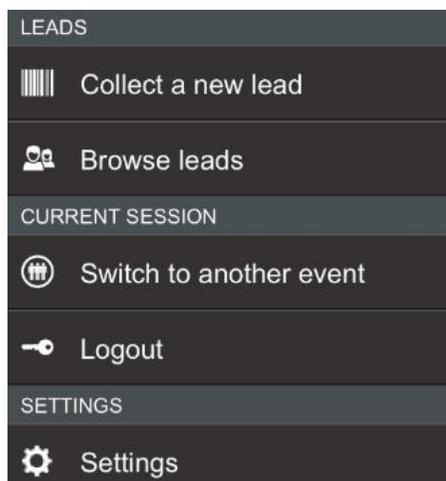
Leads are collected via the app. As well as collecting lead information you can also record their answers to any questions you have set up (via the web portal). The data you collect is continually updated to the central database (if a connection is available).

Login

Double click the Visit Connect App icon and login with your user name and password. A licence must be assigned to the user. See Assign Licences section above.



Main Menu



Collect Leads

You can collect leads either by entering the unique reference or scanning the QR Code, both of which should be on their badge.

To collect a Lead;
▶ Tap the scan icon



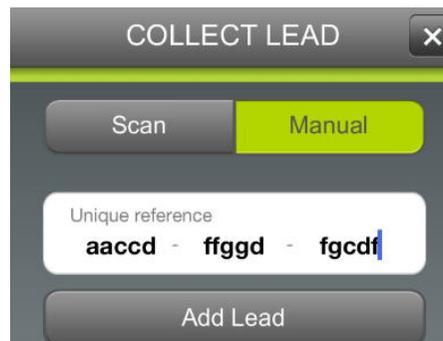
▶ Select if you want to **Scan** the QR code or enter the Unique Reference (**Manual**)

▶ If you select **Scan**, hold the device in front of the QR code . The app scans it automatically.

▶ The light bulb icon activates the flash for scanning in low-light conditions

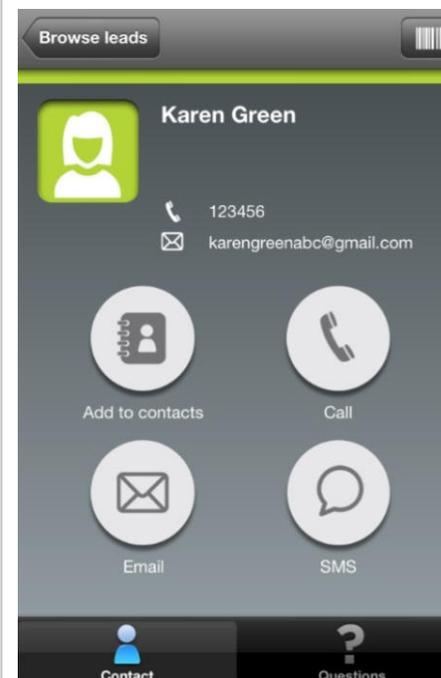


▶ If you select **Manual**, enter the reference that is on the Lead's badge. This consists of 3 sets of 5 letters.



The collected Lead information is updated immediately to your central database, if there is an internet connection available.

Immediately after collecting a Lead, their information will appear on the screen with various options, including to go to the Questions.



- ▶ Tap **Questions**
- ▶ Select a question
- ▶ Select the answer(s)
- ▶ Tap **Next** or **Previous** as required

If no internet connection is available, the request for the lead information is stored on the device and will be

downloaded once an internet connection is available.

Browse Leads

Any Leads that you collect on the mobile device are listed in **Browse Leads**

The most recently scanned leads are at the top of the list.

Settings

In the settings you can define the device reaction in certain situations.

After the Event

Go to the web application, <https://visitconnect.n200.com>, log in with your user name and password. All leads collected, by all mobile devices (and barcode scanners, if being used), are visible under **Browse Leads**.

Scan app technical information

iOS6.0 and higher is supported.
Android 2.2 and higher is supported.

Badges and barcodes

Bob Smith

Visitor




ggdkq-npmfc-xcgbd

Mobile Device App: You can collect a lead by scanning the QR code

Scanning:  If you are collecting leads using a Scanner, scan this barcode before you start scanning their answers on your pdf sheet

Mobile Device App: You can collect a lead by entering the Unique Reference code (#ur#)