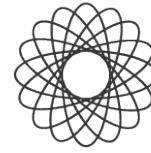


 N200



*GES*

GES GLOBAL NETWORK

**Visit Connect  
Full User Guide  
R3.17**

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# 1. Welcome to Visit Connect

Visit Connect gives you total control over your sales lead management process. There are various elements that make up the Visit Connect package. You can pick and choose what you want to use to best fit your needs.

## Scan app

The scan app allows you to scan a visitors badge, retrieve contact details add notes, photos, voice memos, log answers to questions and much more. You can use the app via tablet or phone, iOS 6.0 or Android 2.3 or higher, can scan on- or offline and even mail leads direct from each device in an excel spreadsheet. Detail will be held on your device and synchronised to the web portal which will hold all lead information.

## Barcode Scanners

The more traditional of our lead collation methods, the barcode scanner allows you to scan visitor badges and record answers to pre-set questions using a barcode sheet. Questions can be standard questions or custom questions set up using the web portal (see **Section 5 Web Portal**). Scanners must be collected at the start of each event and returned to the Visit Connect desk in order for the leads to be downloaded to the portal for access. Barcode scanners must be ordered in advance of an event in order to guarantee availability.

## Web Portal

The web portal allows full management and overview of all of the leads scanned by all the licences purchased, both scan app and barcode scanners. The portal allows you to define custom questions and answers for both the app and the barcode scanners, view, edit and download all leads scanned by all scan apps and barcode scanners, print answer sheets for use with the scanners, set targets and measure progress, send purchased licences via email to the end user, control how the app works for individual users.

## 2. Getting started

When an order is placed for Visit Connect, an email is sent to the email address specified in the order. It contains information about;

**Scan App licences** in the form of QR codes. The QR code should be scanned by the scan app (downloaded from App Store/Play Store, search for N200 Visit Connect) to activate it. It is important that only the mobile device that will be used to scan visitors is used to scan the licence. Scanning the licence activates it; once activated it cannot be used by another mobile device.

**Barcode scanner** orders will be confirmed by the email. The actual scanner(s) will be available from the collection point on the first day of the event, unless otherwise stated.

**Web portal access** is automatically included with every order. Information on how to access the portal is detailed in the email. Use of the web portal is not mandatory if using the scan app, however there are a number of advanced features in the portal which are made available with a licence.

If you are using barcode scanners you will have to access the web portal to be able to download your leads.

## 3. Scan App for Mobile Devices

If you have ordered Scan Apps, the lead collection takes place via an app on your phone or tablet. As well as collecting lead information you can also record answers to either standard questions or custom questions you have set up via the web portal. The data you collect is continually updated to the central database provided an internet connection is available and you have activated a licence.

### Download

Download the N200 Visit Connect app from either the Play Store or App Store. iOS 6.0 and Android 2.3 and higher are supported. Your device must have a suitable camera and you must allow the permissions requested when you first use the app.


Some functions may not be available on your device. See **Section 3 Scan App Specifications** for an overview.

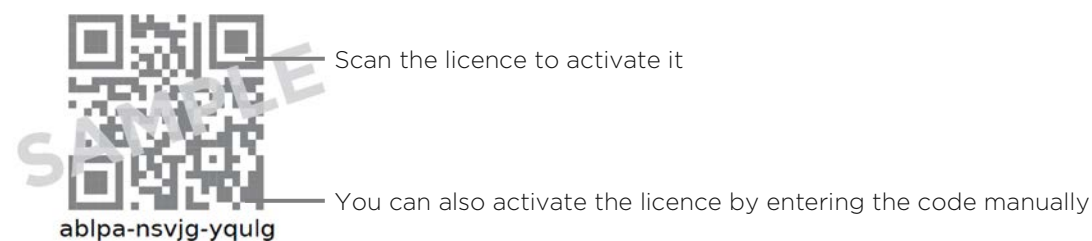
Note that some functionality is dependent on being online and whether or not you have activated a licence. See **Section 3 Scan App Functionality Availability** for an overview.

### Login (Activate a licence)

There are a number of ways to login;

#### Activate a printed licence

- ▶ Tap the scan icon 
- ▶ Scan the licence
- ▶ If you are not able to scan the licence, due to your device not having a compatible camera for example, you can enter the licence code manually



**If you haven't yet purchased a licence, or don't have it to hand, go straight to Collecting a lead**

## Activate a licence from an email


- ▶ On the device you want to use to scan, tap the **Activate Licence** button in the mail
- ▶ If you haven't yet downloaded the app you will be prompted to do so
- ▶ The app opens and is activated

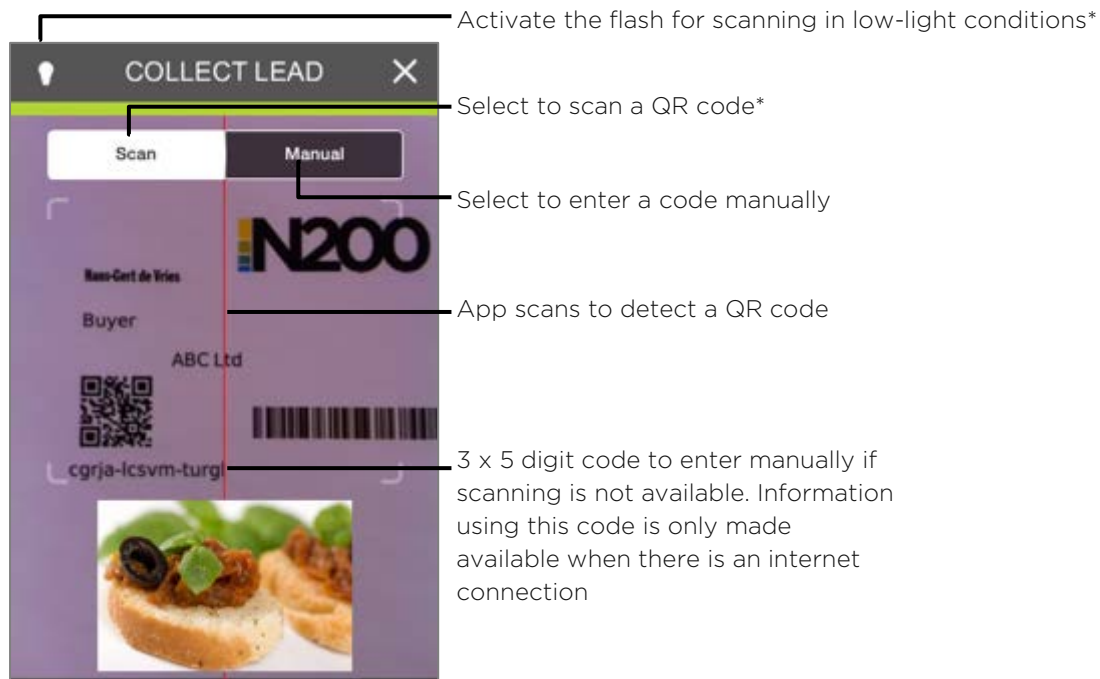


You can find the app version in the **Settings of the app**

## Collecting a lead

You can collect a lead by scanning a visitor's badge or manually entering the code on their badge.

- ▶ Tap the scan icon at the top right of the screen 
- ▶ Select if you want to **Scan** the QR code or manually enter the Unique Reference



*Scan a badge*



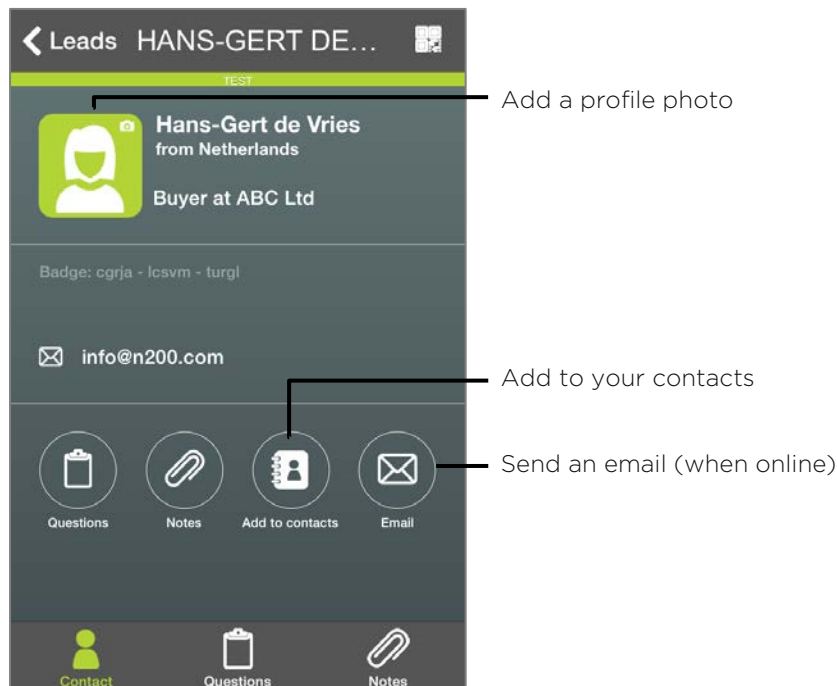
See **Section 8 Badges and Barcodes** for a test badge you can scan



**\*If your device does not support particular functionality, the option will not be displayed. Visit Connect is supported on IOS 6.1 and Android 2.3 and higher.**

## Lead information

Once scanned you have access to the lead's details.



*Collected lead details*



Even if you work offline some information will be available (first name, first letter of last name and country). As soon as you go online all data is synchronised provided you have activated a licence.

## Questions

You can create your own questions, see **Section 5 Web Portal, Custom Questions** or you can use the supplied Standard Questions, see **Section 6 Sample Standard Question Sheet** to log answers to questions.

- ▶ Tap **Questions**
- ▶ Select the answers
- ▶ Click **Next** to go to the next question(s)



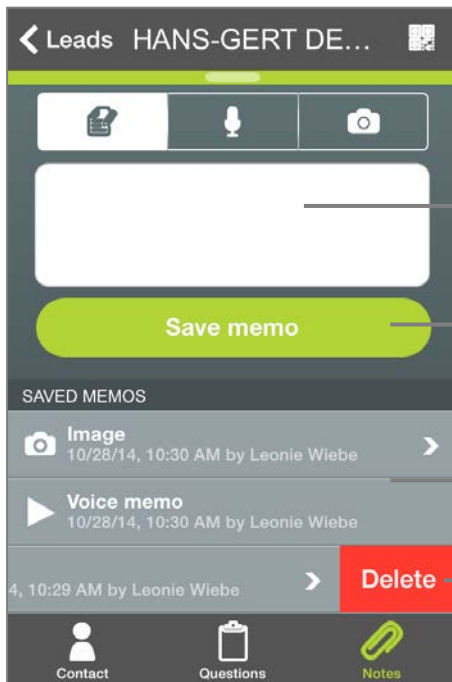
If you don't create any custom questions the standard questions will be available to you.

## Notes

You can add notes to a lead. This is useful for noting your conversation, taking a photo (or a diagram) or adding a quick voice memo.

To add a note

- ▶ Tap **Notes**
- ▶ Select the type of note you want to add; text memo, voice memo or photo

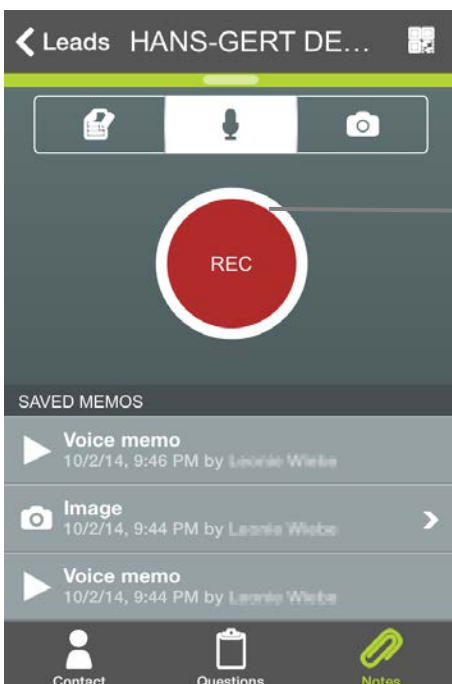


Type note and save the memo

All previously added notes are available

Delete an attachment by swiping to the left

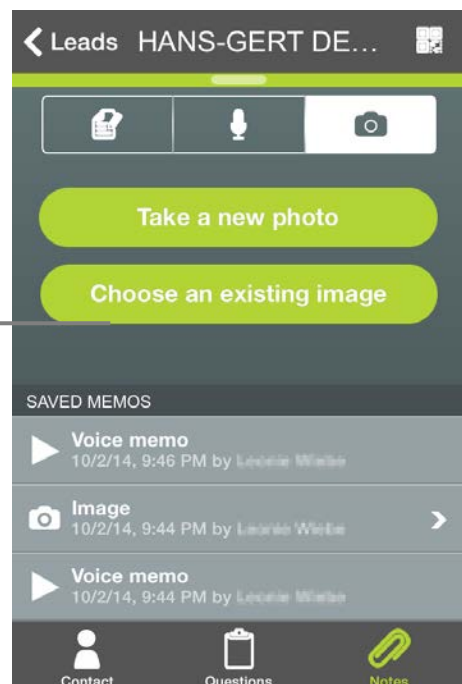
*Add a text note*



Press REC to start recording

Add a new or existing photo

*Add a voice memo*

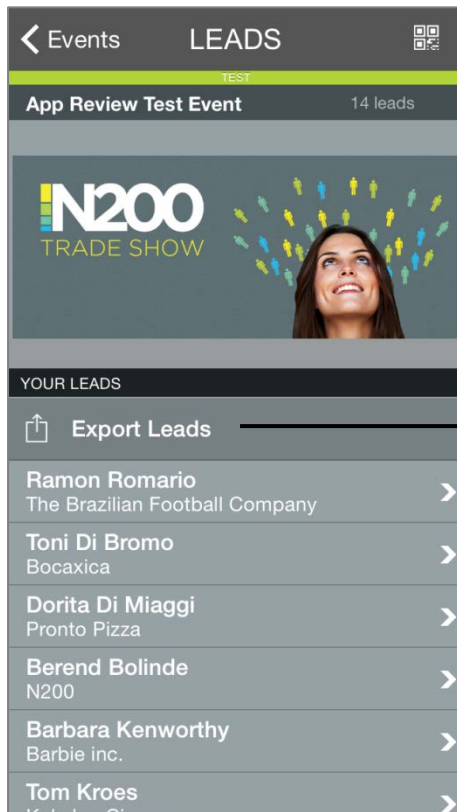


*Add a photo*



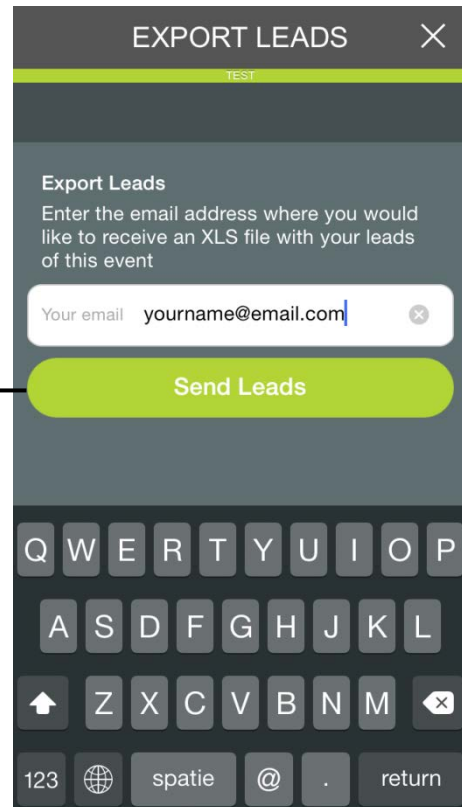
## Browse and export leads

Once you have collected a lead they appear in the leads overview list. You can export them as an Excel workbook via email.



Browse leads

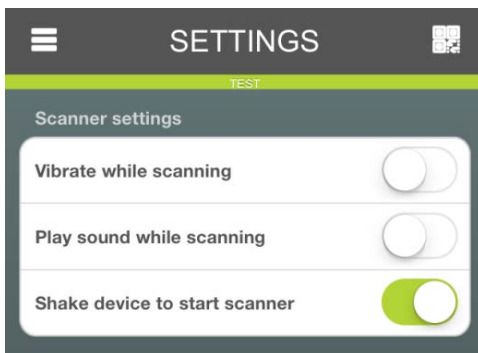
Export leads via email



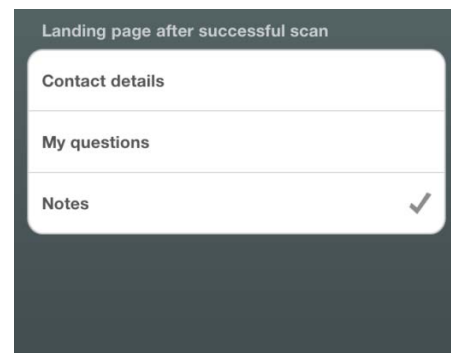
Export leads

## Settings

It is possible to customise the behaviour of the app to your preference.



Settings



## Scan app specifications

The mobile device used to scan should support the following functionality. If it does not, the scan app performance and behaviour can be impacted. You must accept the permissions requested when you first use the app or some functions will not work properly.

Functionality	Impact if not available
<b>Back camera</b>	Not able to scan visitor badges. Leads can still be collected by manually entering the code on the badge.
<b>Internet access</b>	Unable to use app
<b>Autofocus</b>	Badge scanning is more difficult, but not impossible, without autofocus. A steady hand is needed!
<b>Flash</b>	In low-light conditions badge scanning may be more difficult. If there is no flash it may not be possible to make the badge visible enough to scan. You can still enter the badge code manually.
<b>Vibrate</b>	Device will not vibrate when a badge is scanned
<b>Microphone</b>	Not possible to record a voice memo note for a lead

## Scan app functionality availability

Internet connectivity during an event can be unreliable. The Visit Connect app is designed to allow as much functionality as possible to also be available offline.

This table gives an overview of the different functionality and its availability when working offline or without activating a licence.

Functionality	Online	Offline
Login/Activate licence	✓	-
Export leads via email	✓ *	-
Scan Visitor badges	✓	✓
Add notes	✓	✓
Add images	✓	✓
Retrieve custom questions from portal	✓	-
Log answers to questions	✓	✓
View limited personal details of lead	✓	✓
View full contact details of lead	✓	-
Add leads to your contacts	✓ *	✓ *
Send email to a lead	✓ *	-

\* Only available if a licence is activated for an event

## 4. Barcode Scanners

Leads can be collected via Barcode Scanners. As well as collecting lead information you can also record answers to any standard questions and any custom questions you have set up via the web portal. Once you hand back the scanner the collected data is uploaded to the web portal where you can view, edit and export it.

### Print custom questions sheet

If you have created customer questions via the web portal, you should print these and bring them with you. See **Section 5 Web Portal** for more details.

### Collect the scanner

Unless otherwise advised, pre-ordered barcode scanners will be available from the Visit Connect desk on the first day of the event, along with Standard Question scan answer sheets if you have not created your own custom questions.

### Scan Leads

Press the button and scan the barcode. A successful scan is indicated by a high-pitched beep and a green light.



**See Section 8 Badges and Barcodes for a test badge you can scan.**

### Questions

To record lead's answers to questions

- ▶ Scan the barcode on the visitors badge
- ▶ Scan the barcode of the question (either of your custom questions sheet, see **Section 5 Web Portal**, or the standard questions sheet)
- ▶ Scan the relevant answer(s)
- ▶ When finished with one lead, scan the badge of the next visitor



**Always scan the visitor badge before you start scanning questions and answers, otherwise answers will be logged against the previous visitor you scanned.**

## Data

To obtain your data you must return the barcode scanners to the Visit Connect desk. The data will be downloaded and you can view, edit and export the data from the web portal. See **Section 5 Web Portal** for details on how to do this.

## 5. Web Portal

You can use the web portal to customise your experience, manage your lead collation and access your leads post event. For those of you using barcode scanners your leads will only be accessible via the portal.

### Access

Your order confirmation mail includes a URL which links to the web portal. You can create a new account per event or, if you have used Visit Connect previously, you can link all the events to one account.

If you, or someone else from your company, have already created an account you may be prompted to use that account. If you try to create another account you will be prompted to adjust your company name as we already have an account in that name. You can either do this or use the login details created previously.

The URL for subsequent logins is <https://visitconnect.n200.com>.

### What can you do?

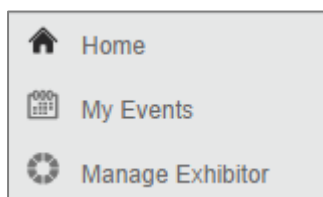
There are many ways to customise your set up. You can;

- **Set targets** –for how many leads you want to collect. Measure your actual performance against your target.
- **Create custom questions and answers** –. You can access these via the scan app or you can print off an answer sheet if you are using barcode scanners.
- **Send licences** – you can email scan app licences
- **Add users** – add other users for the web portal

### Manage your account

From the main menu you can go to;

- **Home** – here you can view the tour of the Visit Connect application, view lead collection statistics and see the events for which you have a licence for.
- **My Events** – here you have a list of events
- **Manage Exhibitor** – here you can change your company name



*Manage your account*

## Set targets

You can set targets for the number of leads to be collected per day of the event.

To set targets

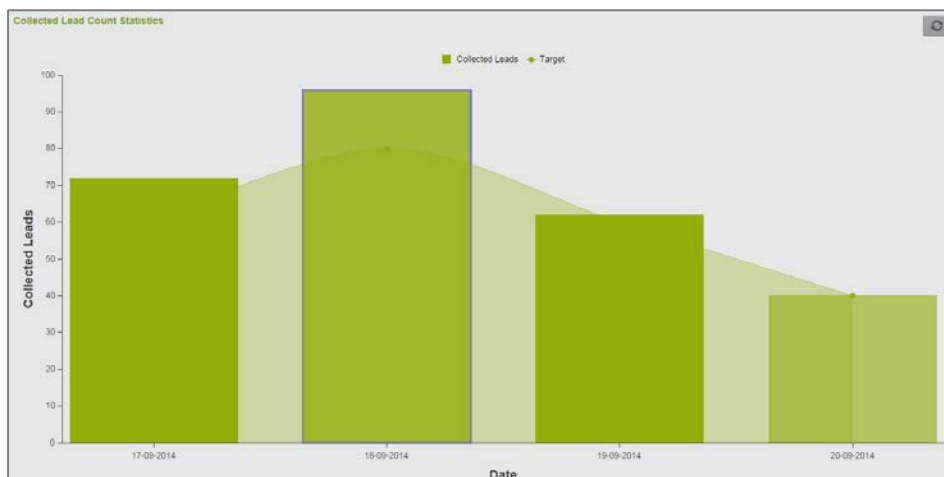
- ▶ Click **Set Targets**
- ▶ Select a date
- ▶ Enter figures in **Target Performance, Moderate Performance and Minimum Performance**
- ▶ Click **Save**

Targets	
Day:	2
Date:	18-09-2014
Target Performance:	<input type="text" value="80"/>
Moderate Performance:	<input type="text" value="60"/>
Minimum Performance:	<input type="text" value="40"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Enter the target number of leads you want to collect each day

*Set targets*

During, and after, the show you can check progress by clicking on **View Statistics**.



Click to refresh the display

*View statistics*

# Questions

There are two types of questions, custom questions and standard questions;

- **Custom questions** – questions you create yourself along with the potential answers you want to record
- **Standard questions** – there are 4 standard questions, each with 10 answers. If using scanners you can write your potential answers on the sheet so you know what each answer means.

## Custom questions

To create custom questions

- ▶ Select **Manage Questions**
- ▶ Click **Add Question**
- ▶ **Enter** your question
- ▶ Select the **status**
- ▶ Select the **answer type**
  - ▶ **Free text** gives the lead the opportunity to give any answer. Note that answers can only be given to this answer type via the Scan App, not Barcode Scanners.
  - ▶ **Single choice** displays radio buttons, of which only one can be selected
  - ▶ **Multiple choice** displays check boxes, of which more than one can be selected
  - ▶ **Drop-down** list displays a list when clicked, of which only one can be selected
- ▶ **Enter** your answers
- ▶ Click **Save**
- ▶ If using barcode scanners, click **Download barcodes PDF** to print out the sheet to take with you. See **Section 6 Sample Question and Answer Sheets**

Default is Enabled for the selected event

Question: What products are you interested in?

Status:  Enabled  Disabled

Answer Type:  Multiple choice  Single choice  Drop down list  Free text

Product A

Product B

Click to enable user input for the answer (only for scan app)

Click to delete an answer

Click arrows to change sort order





**Custom questions are available across all your events, the enable or disable status applies to the event you are logged in to at the time.**

## Standard Questions

There are four standard questions, each with ten potential answers;

- Employee
- Product
- Follow-up
- Your own questions

If you are using the scan app and only want to use the custom questions then you do not have to create any custom questions. The standard questions will appear in the app.

If you are using barcode scanners then you should print out the standard questions sheet, click **Download barcodes PDF** to print it out. See **Section 6 Sample Question and Answer Sheets**.

## Licences

The scan licences you have ordered can be seen in the portal, at **Manage Scan Licences**. The scan app licences have to be activated by the scan app to allow full access to an event.

From the portal you can email a licence to whoever is going to use it or print it out so they can be activated on a mobile device.

<input type="checkbox"/> Name	E-mail address	Scans	Type	Activation Time
<input type="checkbox"/>		0	Scan app	Not yet activated
<input type="checkbox"/>		0	Scan app	Not yet activated

These fields are empty until there is information to display in them

Both scan app and barcode scanner licence types appear in the list

Print off (unassigned) licences

Select to email the licences to various people

You can also view and edit individual licences

The screenshot shows a 'Licence' form with the following fields and controls:

- Name:** A text input field containing 'enteraname'. An annotation points to this field stating: 'This name will be displayed in the Browse Leads list'.
- Email address:** A text input field containing 'email@email.com'. A 'Mail licence' button is located to the right of this field. An annotation points to this button stating: 'Once a licence is activated you can no longer print or mail the licence'.
- Activation Time:** A label with the text 'Not yet activated'.
- Do you want to allow this user to be able to mail leads from the scan app?** A question with two radio button options: 'Yes' (selected) and 'No'.
- Buttons:** 'Save', 'Print licence', and 'Cancel' buttons are located at the bottom right. An annotation points to the 'Print licence' button stating: 'Print off (unassigned) licences'.

Below the form, the word 'Licence' is written in italics. A note below the form states: 'Select your choice. You can change this at any time.'






### To **send** a licence

- ▶ **Select** a licence
- ▶ Enter a **name**
- ▶ Enter an **email address**
- ▶ Click **Mail licence**
- ▶ Select if the licence user is allowed to mail leads from within the scan app
- ▶ Click **Save**





## 6. Sample Question and Answer Sheets

If you are using barcode scanners to collect your leads you will need to scan answers to any questions you want from an answer sheet. The standard questions each have 10 answers. This sheet can be collected when you pick up your scanner. The custom questions sheet contains the questions set up in the web portal. You need to print this sheet prior to the event.

### Sample custom questions sheet

<b>Test Catering Trade Fair 2013</b>	Printed on Fri Oct 3 16:28:07 2014
<b>N200 System Account</b>	
<hr/>	
<b>Value of order</b> 	
	2000
	5000 
	10000
	Other 

### Sample standard questions sheet

<b>Standard Question &amp; Answer Sheet</b>	
<b>Valid for all events</b>	
Use the barcodes below to record your interactions with leads. It is useful if you write your questions and the answers represented on this sheet. The answer(s) recorded for each lead will be synced to the portal and are included in the lead download file.	
<i>More than one answer is possible for this question. If more than one answer is scanned, all scanner answers are recorded.</i>	
<b>1. Employee</b>	
<hr/>	
	
<i>Your answer 1</i>	
	
	<i>Your answer 2</i>
	
<i>Your answer 3</i>	

## 7. Leads download file

You can download leads from both the scan app (email leads collected on that device) or via the web portal (download all leads collected by all of your licences for an event). The details are in an Excel workbook which contains the following fields as standard. Note that this information is only available if it has been collected during the registration process. In addition, if you log answers to questions they will also be included along with links to any attachment such as text notes, voice memos or images.

Field Name	Description
<b>Time</b>	Date and time lead was scanned. Time zone is Universal Time Coordinated (UTC)
<b>Gender</b>	Gender of lead. Possible values are 'male' or 'female'
<b>Title</b>	Title of lead
<b>Initials</b>	Initials of lead
<b>First Name</b>	First name of lead
<b>Last Name prefix</b>	Last name prefix of lead
<b>Last Name</b>	Last name of lead
<b>Job Function</b>	Job function of lead
<b>Department</b>	Department of lead
<b>Company</b>	Company of lead
<b>Address 1/2/3</b>	Address lines 1,2 and 3 of lead
<b>House number</b>	House number of lead (if captured separately)
<b>Postal Code</b>	Postcode of lead
<b>City</b>	City of lead
<b>State/County</b>	State/County of lead
<b>Country</b>	Country of lead
<b>Phone 1</b>	Phone number of lead
<b>Phone 2</b>	(Additional) phone number of lead

<b>Fax</b>	Fax number of lead
<b>Email</b>	Email address of lead
<b>Website</b>	Website of lead's company
<b>COC</b>	Chamber of commerce number of lead's company
<b>VAT number</b>	Registered tax (VAT) number of lead's company
<b>Badge UR</b>	Unique reference, appears on lead's visitor badge
<b>Lead code</b>	Unique identifier for each collected lead
<b>Stage</b>	The stage that the lead is registered at. When first scanned they are set to 'New'. Stages can be edited via the web portal.
<b>Type</b>	Registration type of lead
<b>Scanned by</b>	Who scanned the lead. Leads scanned by a scan app display the name entered in the app. Leads scanned by a barcode scanner display an identifier of the barcode scanner.
<b>Notes</b>	Links to all notes made
<b>Language</b>	Language of lead

Any profile questions asked during registration will appear after these fields along with the answers given by the lead

## 8. Badges and Barcodes

This is a test badge. You can scan this with the scan app (not a barcode scanner). The lead details can be viewed in the scan app.

**Ted Tester**

Buyer

Euro Foods



ablpa-nsvjg-yqulg

**Scan app** Collect a lead by scanning the QR code

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

**Scan App:** You can collect a lead by entering the Unique Reference code

## 9. Further Questions

If you have any further queries please contact either our UK or NL office on the details below.

### N200 UK

Tel: +44 1923 690690

Email: [visitconnect@n200.com](mailto:visitconnect@n200.com)

### N200 NL

Tel: +31 23 5120160

Web: [www.n200.com](http://www.n200.com)