



Leadretrieval

by Fira de Barcelona



USER MANUAL

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1. Lead Retrieval by Fira Barcelona

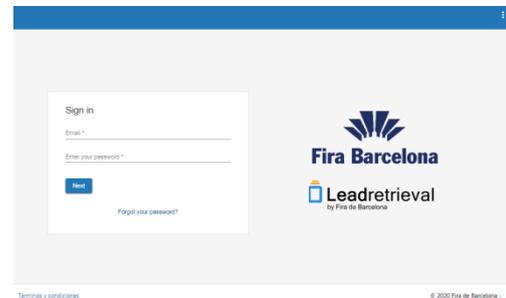
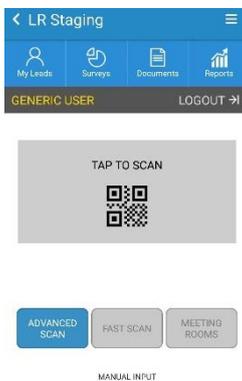
Lead Retrieval is a service for capturing and following up the leads you make during an event, trade fair or congress.

The Lead Retrieval system has 2 separate components:



The **App** scans the visitor's badge and converts it into a lead

The **Web Portal** acts as a database for managing the leads.



With the **App**, the user can scan the leads, run surveys, send documents, add notes or define tags in real-time. The scanned leads are synchronized in the Web Portal under the same company account.

The **Web Portal** offers access to the leads information & statistics. It is where surveys & tags are created and documents are uploaded.



2. Web portal: Configure your service

2.1. Access the Web portal

The Administrator is responsible for the Lead Retrieval system and has access to all the functionalities of the Web Portal. Fira assigns the Administrator role to the person indicated in the purchase form as the responsible of the Lead Retrieval service during the event.

On the first login, only the Administrator can access the Web Portal. Access the URL <http://lrback.firabarcelona.com/>.

Please get in contact with the Lead Retrieval team if you didn't get the credentials to access the Web Portal.



IMPORTANT: There's only **1 Administrator** assigned per company for security and simplicity reasons. If you strongly need to have more than one, please contact us at leadretrieval@firabarcelona.com.

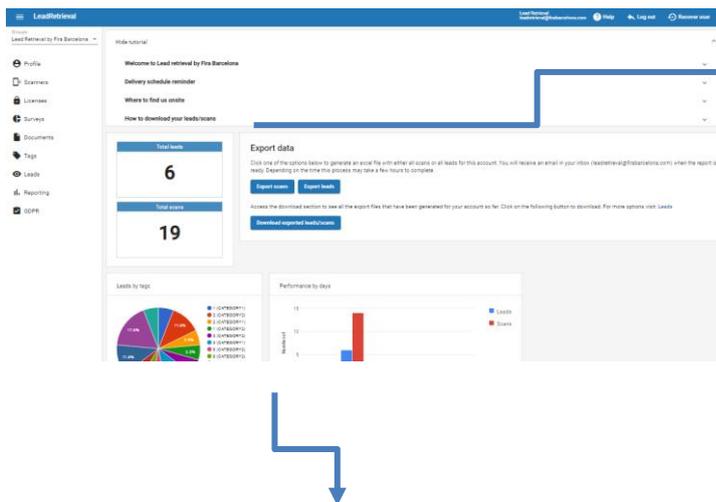


2. Portal web: Configure your service

2.2. Dashboard

On the homepage of the Web Portal, the Administrator will see a dashboard that includes important information about the lead capturing progress and the performance of the team.

There's also a introduction or tutorial made by the Lead Retrieval team for administrators to have all the information in a quick way.



Scans and Leads statistics.

Team Members and their scanned lead statistics



Difference between Lead and Scan

Lead defines a stand visitor. Scan defines a scanning of the visitor badge. The same visitor (lead) might keep coming back to your stand and every time the person is scanned, it will be seen as a scan.



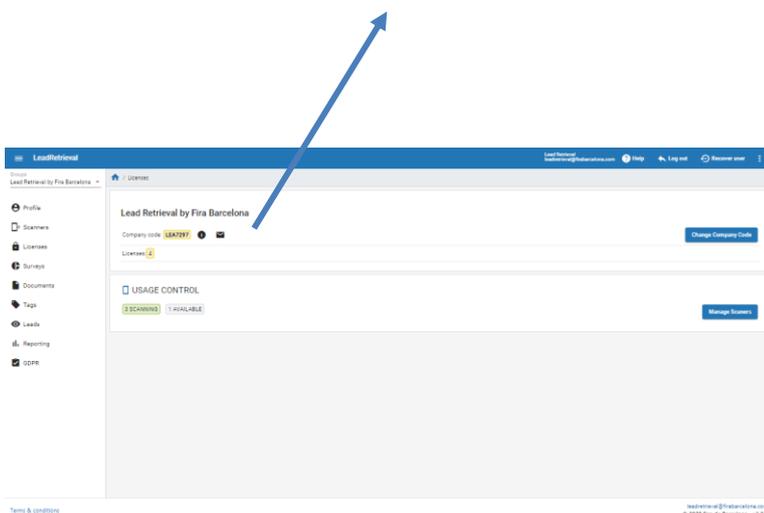
2. Web portal: Configure your service

2.3. Managing licenses

The Company Code is necessary to log in to the Lead Retrieval App. You can consult your Company Code in the Licenses section.

At any time, the Administrator can monitor the number of licenses that are in use using the Web Portal, in the Licenses section. Pay attention: don't log-out a scanning license that is in use by one of your users as the App might stop working and it might be necessary to log in again

Send Company Code to administrator(s)



Change Company Code, used in exceptional cases and generated automatically

Disconnect any active scanners

IMPORTANT: Changing the Company Code means all your scanning users will not be able to Access the App until you provide them with the new Company Code. We do NOT recommend to use this functionality except if it's strictly necessary.



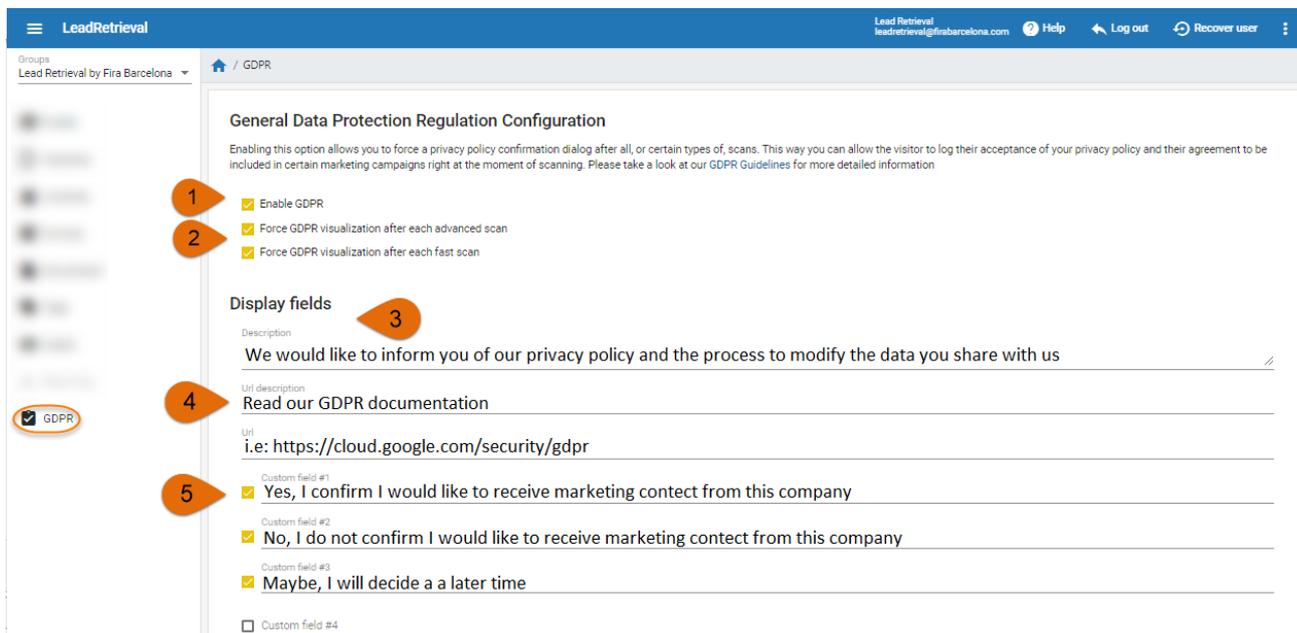
2. Web portal: Configure your service

2.4 Additional features

2.4.1 GDPR: Pop-up

In case of a simple exchange of information with the goal of sharing specific info related to the context in which the data was shared, just like would be the case when sharing business cards, the visitor's act of allowing their badge to be scanned implies the consent needed. In case of needing further confirmation, you can use our GDPR pop-up.

To customize your GDPR pop-up, go to the tab GDPR on the left-side menu.



The screenshot shows the 'GDPR' configuration page in the Leadretrieval web portal. The page is titled 'General Data Protection Regulation Configuration' and includes the following sections:

- Enable GDPR:** Three checkboxes are shown, all of which are checked:
 - 1. Enable GDPR
 - 2. Force GDPR visualization after each advanced scan
 - Force GDPR visualization after each fast scan
- Display fields:** A section with a text description:
 - 3. Description: We would like to inform you of our privacy policy and the process to modify the data you share with us
 - 4. Uri description: Read our GDPR documentation
 - Uri: i.e: <https://cloud.google.com/security/gdpr>
- Custom fields:** Four checkboxes are shown, all of which are checked:
 - 5. Custom field #1: Yes, I confirm I would like to receive marketing contact from this company
 - Custom field #2: No, I do not confirm I would like to receive marketing contact from this company
 - Custom field #3: Maybe, I will decide a a later time
 - Custom field #4: (unchecked)

1. Enable GDPR
2. Make GDPR mandatory on Advanced scan
3. Make GDPR mandatory on Fast scan
4. A small summary/description
5. An URL and its description (the full text of your privacy policy for example) that can be opened in the app
6. Different checkboxes to use depending on your own needs.

For more information please consult our [GDPR GUIDELINES](#) or contact us.



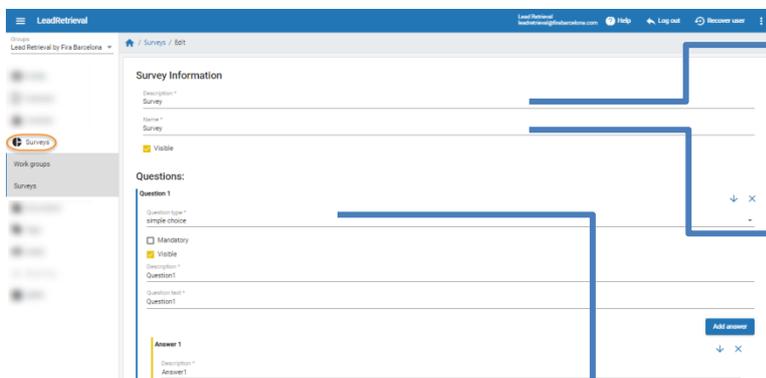
2. Web portal: Configure your service

2.4 Additional features

2.4.2 Surveys and workgroups

The Surveys that you will be able to run from the Lead Retrieval App need to be defined in the Web Portal by the Administrator.

To create Surveys, go to the section **Surveys** → Click on **Add Survey**.



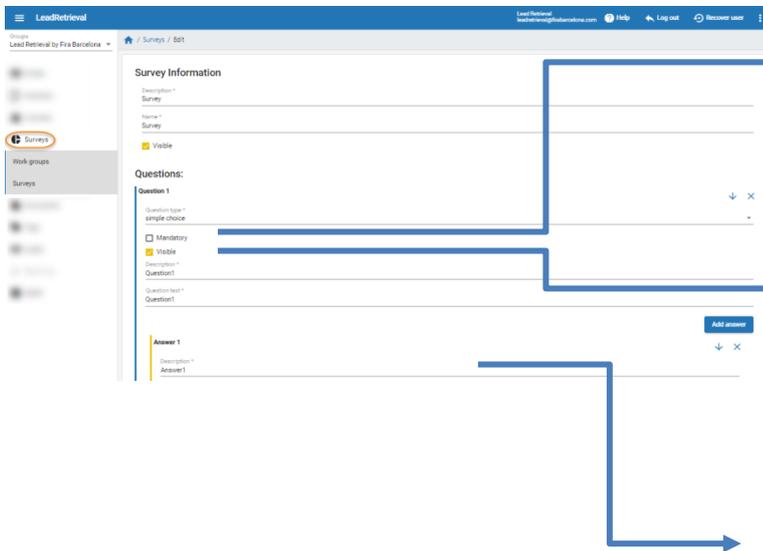
Survey description. Only visible to the Administrator.

Survey Name is the name that will be visible to the person using the App. Default setting: 'visible'

Add Question. 5 types available (simple choice, multiple choice, small text, long text, date).



2. Web portal: Configure your service



Mandatory: if you want this question to be answered in order to consider the survey as complete

Visible: uncheck to hide the question

To define the answers to the question you are authoring

Check the **Order answers alphabetical** button if you want the answers to be sorted alphabetically in case of single choice or multiple choice questions.

Once your questions and answers are defined, you can edit, eliminate or sort them with the buttons at the right of each of them.

Simply click **Save**, at the bottom of the screen when the survey is finished and it will be created.

If you want to preview your surveys to see how it will look when running it, go to the **Viewer tab**.



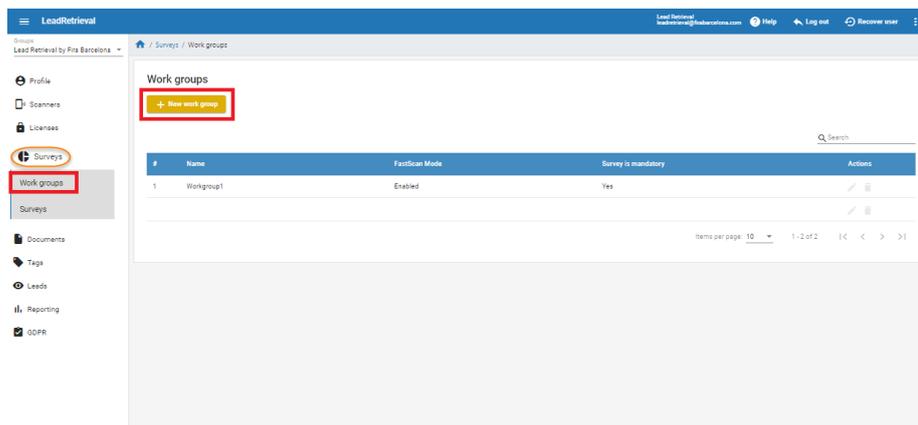
2. Web portal: Configure your service

2.4 Additional features

2.4.2 Surveys and workgroups

Workgroups

Assign surveys to specific scanners/persons of your Company.



Name of the workgroup

Select the assigned survey.

Assign the survey as mandatory (it will pop-up as soon as you scan).

Disable the survey on Fast scan.

Select who will be part of this workgroup.

Add people by number of badge.



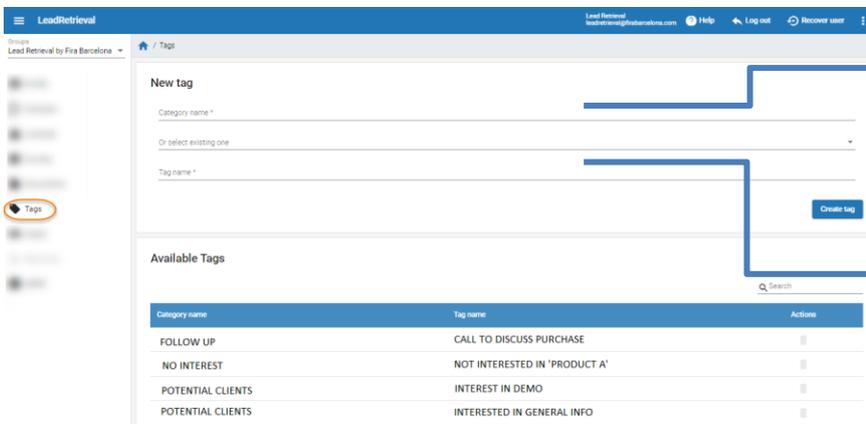
2. Web portal: Configure your service

2.4 Additional features

2.4.3 Tags

When scanning a lead, the user will have the option to tag it with whatever categories and tags were previously created in the Web Portal. **This can be used to categorize potential customers.**

Please note that only the Administrator can create new categories and tags. In order to do it, go to the 'Tags' section in the Web Portal and fill in the boxes. Repeat this process any time you need to create a new tag.



Category name	Tag name	Actions
FOLLOW UP	CALL TO DISCUSS PURCHASE	
NO INTEREST	NOT INTERESTED IN 'PRODUCT A'	
POTENTIAL CLIENTS	INTEREST IN DEMO	
POTENTIAL CLIENTS	INTERESTED IN GENERAL INFO	

Category name: For example: "Lead Type"

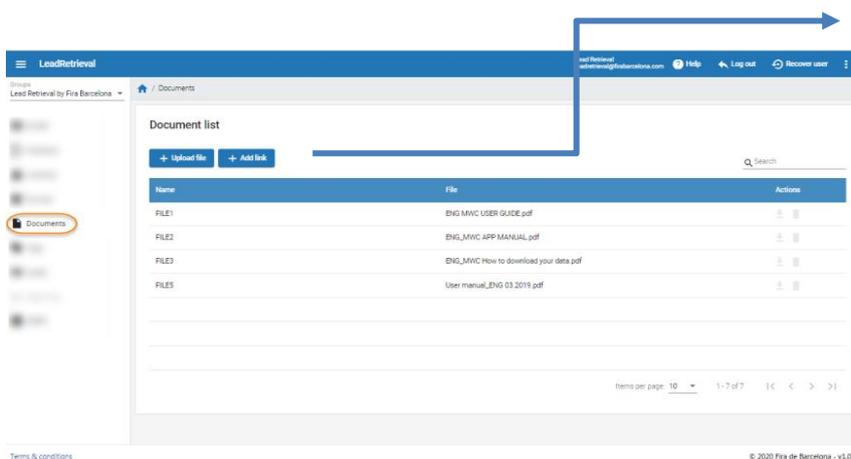
'Tag name'
For Example: "Promising Medium sized Lead"



2. Web portal: Configure your service

2.4 Additional features 2.4.4 Documents and Links

After scanning with the App you will be able to send him/her documents such as catalogues or product presentations. In order to do that, you need to upload the documents to the Web Portal in advance.



Upload documents or links.
Upload files of up to 5MB. You can upload up to 10 documents and unlimited number of links

Uploaded files can be of any of the standard document formats: pdf, Excel, PowerPoint, Word, zip, etc. Uploaded files can be of any size up to 5MB

Using the app you will be able to select any amount of these documents/links and send them automatically to the visitor compiled into one email.

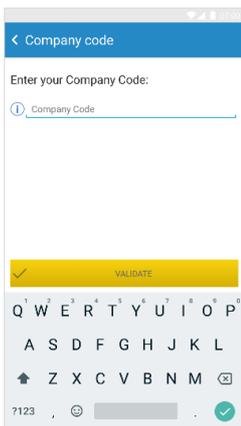
IMPORTANT: Please make sure your leads have permissions for the links you send to them



3. Lead Retrieval APP

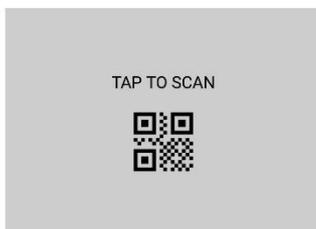
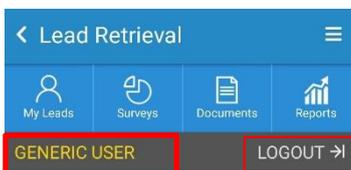
3.1. Log-in

The Company Code is the company access code that all the users of a company use to login to their device. It should be shared with all scanner users of your company. It is what links their scanning efforts to your company's account.



Introduce the Company Code in the input text field, then click Validate.

When accessing the App, a Scanning License needs to be free in order to access the service. If you get an error notifying of no licenses available that means you don't have any more licenses to use. In case of a mistake please see 2.3 to free licenses through the Web Portal.



If you are already logged in: The name of the logged user will appear at the top left corner just above the scanning area. By clicking the logout button, the user will be able to log out of the App



MANUAL INPUT



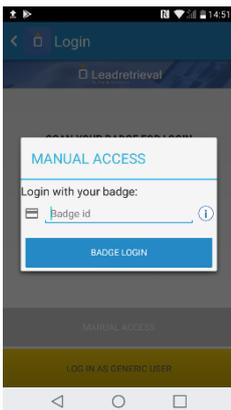
3. Lead Retrieval APP

3.1. Log in

There are 3 alternative ways for logging in



Scan your own badge. By approaching the mobile device to your badge, the App will retrieve your contact information and log in automatically. Once logged in, any and every lead scanned will appear under your name on the Web Portal.

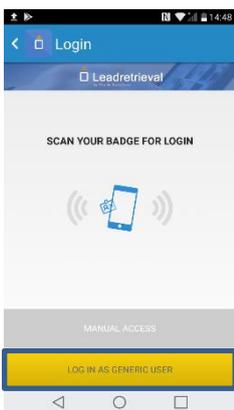


Manual Access

Manual option of logging in in case you don't have your QR.

Click on Badge id and input the 8 digit code that appears below the QR code on your badge.

Click Badge Login



Generic User.

Represented by a button underneath the manual access, which will allow you to quickly sign in without needing to scan a badge of the person using the Scanner. Once logged in, any and every scan will appear under the name "Generic scanner" on the Web portal.



3. Lead Retrieval APP

3.2. Scanning leads

The App offers 3 scanning modes.



ADVANCED SCAN

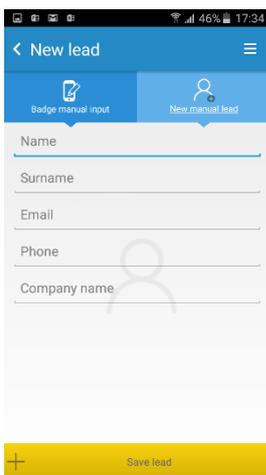
Advanced Scan: Obtain information and make use of the previously configured additional features (surveys, notes, documents, gdpr pop-up, tags..). After scanning it will take you to the scanned visitor's profile.

FAST SCAN

Fast Scan: Obtain information without going to the advanced functions. It scans a contact and is ready instantly for another scan.

MEETING ROOMS

Meeting Rooms: By creating a meeting room session, you can scan people IN/OUT.



Manual input: leads to a screen in which the user can input the Badge ID of the contact whose information needs to be retrieved. You can also introduce a lead without a badge simply by introducing his/her details manually.



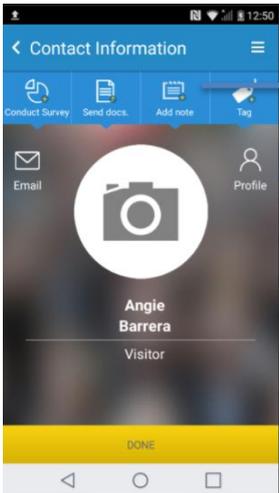
For scanning, make sure the QR code on the badge is clearly visible and in focus. Pay special attention to glare on the plastic and the distance to the code. For NFC simply tap the badge to the device's back.



3. Lead Retrieval APP

3.3. Lead profile and notes

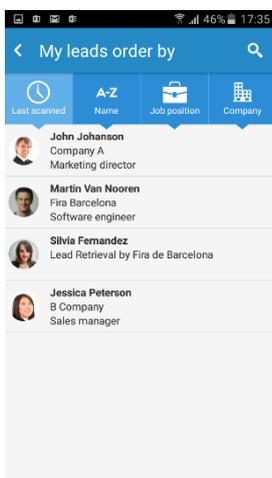
Advanced Scan mode functions:



To take a note just click **'Add Note'**

Take surveys, send documents, write notes and assign tags.

Profile icon to see more detailed information. There, you will see a couple of different tabs: Contact Details, Job Details, and Surveys



The **My Leads** button on the home screen of the App, lets you access a list of all the leads scanned by your current scanner profile. If you select one lead of this list, you go to his/her profile.

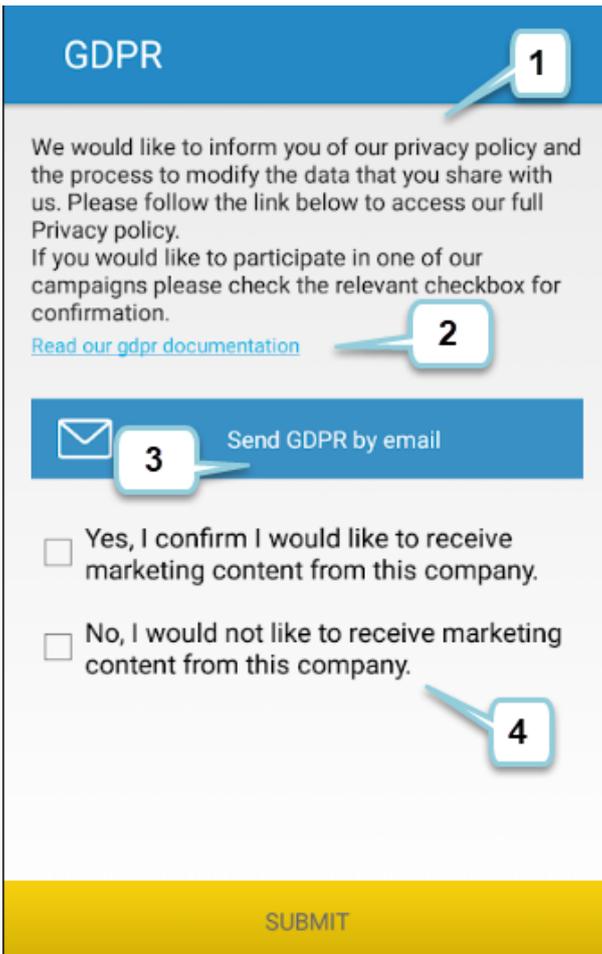


3. Lead Retrieval APP

3.4 Additional features

3.4.1 GDPR: Pop-up

GDPR pop-up after scanning (if enabled).



The screenshot shows a GDPR pop-up form with a blue header and a yellow 'SUBMIT' button at the bottom. The form contains the following elements:

- 1**: A blue header bar with the text 'GDPR'.
- 2**: A paragraph of text: 'We would like to inform you of our privacy policy and the process to modify the data that you share with us. Please follow the link below to access our full Privacy policy. If you would like to participate in one of our campaigns please check the relevant checkbox for confirmation.' Below this is a blue link: 'Read our [gdpr documentation](#)'.
- 3**: A blue button with an envelope icon and the text 'Send GDPR by email'.
- 4**: Two checkboxes with labels: 'Yes, I confirm I would like to receive marketing content from this company.' and 'No, I would not like to receive marketing content from this company.'

- 
1. Summary
 2. Link (URL).
 3. Send an e-mail with the summary + URL.
 4. Different checkboxes.

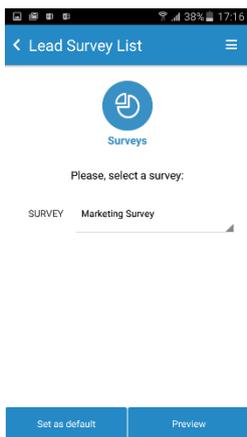


3. Lead Retrieval APP

3.4 Additional features

3.4.2. Surveys

Once a contact has been scanned in Advanced Scan mode, the advanced functions screen appears, in which the user has access to see the contact details, take notes, run surveys or send documents to the lead. By clicking on Surveys you proceed to run a survey to your lead.



First you need to select a Survey from the ones you have defined in the Web Portal



Run a survey by answering the different questions. You can move between questions easily and save it anytime, even if not completed. You can reopen a survey later from the lead profile and continue or edit it

Through Surveys, on the home screen of the App, you can visualize the surveys and see the questions beforehand.

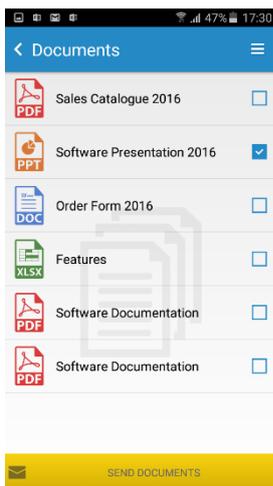


3. Lead Retrieval APP

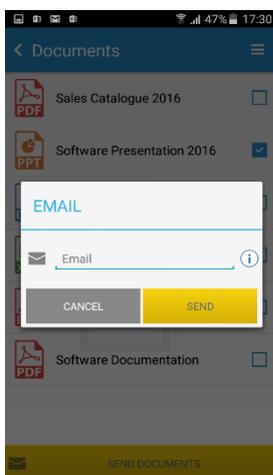
3.4 Additional features

3.4.3 Sending documents

In the advanced functions screen (after scanning a lead in Advanced Scan mode) click on Documents to send documents to your lead via email. You can also do it manually from the home screen by clicking the Documents icon and introducing the email of the person to whom to send the documentation.



Select which documents or links to send to your lead from the list of documents that your admin user uploaded to the Web Portal, then click on Send Documents.



A screen will pop up with the email address of the lead you just scanned and you will be asked for confirmation.

An email with links to the documents will be sent to the lead or the email address provided. The user will be able to download the documents by clicking on them. You can edit the email text using the Web Portal if desired.

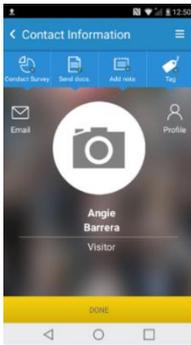


3. Lead Retrieval APP

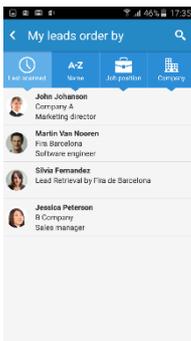
3.4 Additional features

3.4.4 Tags

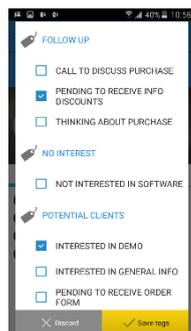
There are two ways of tagging a contact.



1. Right after scanning a lead with the Advanced Scan mode, just click on the label icon and choose which tags you want to apply to that lead.



2. You can also access the list of scanned leads at any time and select a specific lead.



Tag a contact: Choose from the tags previously created on the Web Portal and they will apply to that lead.



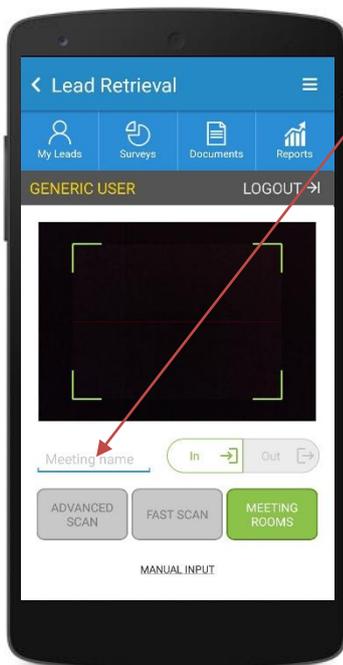
3. Lead Retrieval APP

3.5 Meeting Rooms

This scanning mode will let you scan visitors as 'IN' or 'OUT' inside a meeting or even on your stand.

To start a meeting simply add a **Meeting Name** and start scanning everyone as 'IN'.

Once the meeting is finished you will want to scan everyone that came in as 'OUT'. To start a new meeting simply change the Meeting Name and scan with IN again.



MEETING NAME

Start a meeting by adding a name. All scans and leads will be saved under the Meeting Name on the Portal web

IN / OUT



Scan people IN or OUT with a single click. Scans/Leads will show the visitors information with 'IN' or 'OUT' and the date/hour on the Web Portal.

Please take into account that any information gathered from scanning as Meeting room, it will be stored separately from the information gathered as Leads/Scans.



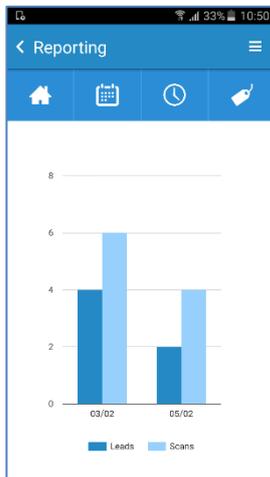
3. Lead Retrieval APP

3.6 Reports

The App offers a limited reporting functionality. The Web Portal offers more extensive reporting and stats.

You can access to Reports from the home of the App. You will be able to visualize stats of daily leads and scans corresponding to the scanner user that is logged in at that given moment.

For more detailed reporting and visualization of leads, we suggest to access the Web Portal.



Top 5 report

TOTAL CONTACTS		4
YOUR CONTACTS		4
1.)	Sandra Lund	5
2.)	Giedre Ciapaitė	4
3.)	Sarah Parker	4



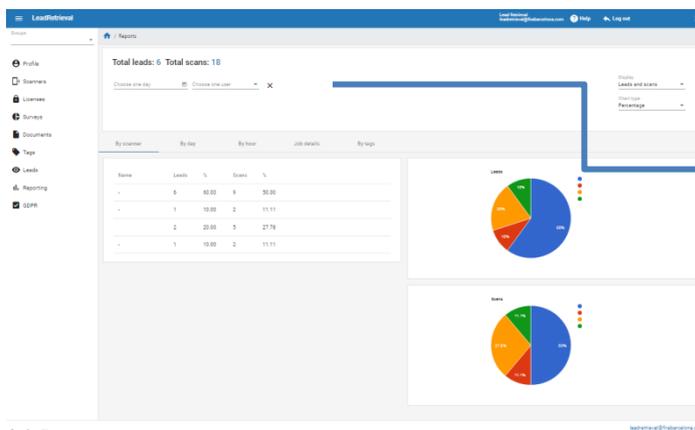


4. Stats of your leads on the web portal

Stats of your leads on the web portal

The Web Portal offers leads statistics and reporting with many options and filters. Log onto the Web Portal and go to the Reporting Section.

You have the possibility to see stats such as leads or scans per day, per hour or per scanner user. You can also see stats per Job Details of the leads you have scanned. There's pie charts to the right side for easy interpretation of the data



Filter by date or/and user
and choose below how to
visualize the information
(by tags, by hour...)

The Administrator user has access to the company consolidated information and the stats that appear include information from all leads.

IMPORTANT: Only the administrator user has the access to Web Portal.



5. Managing and exporting information

Managing and exporting information of your leads through the web portal

The Web Portal offers access to lead details. Log onto the Web Portal and go to the Leads Section. You will see a list of all the scanned leads. The Administrator can see all company consolidated leads and can filter per scanner user.

There are 2 reports:

- **By leads** (all the visitors, who were scanned by devices using our app with your company code, one line per lead)
- **By scans** (all the separate scans by devices using our app with your company code, possibly multiple lines per lead in case of multiple scanning instances)

2. Lead information can be exported in an Excel file for later importation into your CRM, by clicking on the Export Scan or Export Lead button.

3. Access your generated files by clicking on 'Download exported Leads/Scans'

Your leads/scans report will be generated within seconds (or up to a couple of hours in case of a lot of simultaneous downloads) You can then download them directly from the web portal using the download exported leads/scans button



IMPORTANT: You can access the Web Portal and download your data from the moment you receive your login details until 3 months after the last day of the event



5. Managing and exporting information

Managing and exporting information of your meeting rooms through the web portal

Similarly like the process needed to export and download Leads/Scans but it will contain solely information gathered through the scanning mode of 'Meeting Rooms'.

The biggest difference is that said lines will contain a 'scan type' referring to 'IN' and 'OUT'.

You can filter through your different registered meeting names in 'Select Meeting' and export/download the information separately or, without selecting any meeting you can also download the information all together.

Export Meeting Rooms

Download exports

Meeting Rooms scans

Select meeting

Meeting 4

x

Q Search

Lastname	Firstname	Company	Jobtitle	E-mail	Scanner full name (Badge number)	Meeting	Scan type	Visit date
					Generic Scanner - 231	Meeting 4	In	2021-05-31 17:03:20
					Generic Scanner - 231	Meeting 4	Out	2021-05-31 17:04:16

Items per page: 10

1 - 2 of 2

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IMPORTANT: You can access the Web Portal and download your data from the moment you receive your login details until 3 months after the last day of the event



Portal Web: <https://lrback.firabarcelona.com>

Lead Retrieval Official page: <https://leadretrieval.firabarcelona.com/en/>



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Call Center schedule: 9AM to 18PM daily.

