

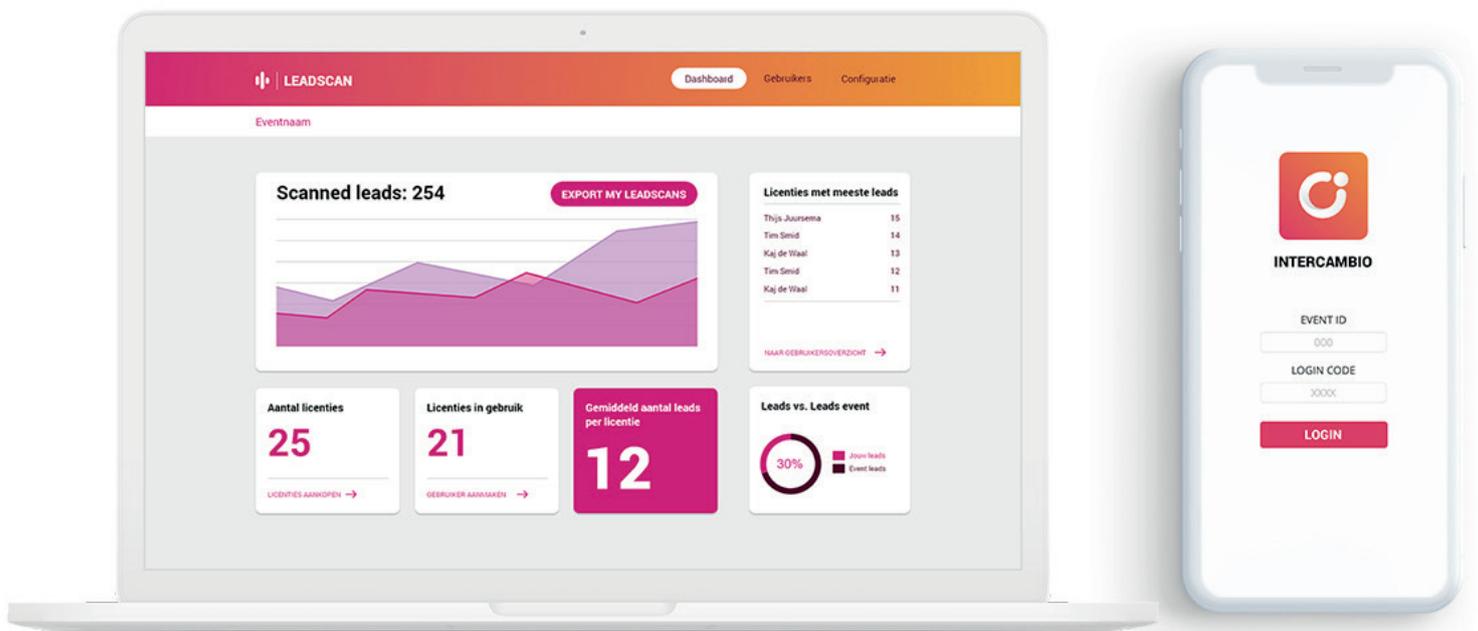


# INTERCAMBIO LEADSCAN PORTAL & APP

## QUICK GUIDE

# INTRODUCTION

With Intercambio Leadscan from Invitado you can quickly keep track of who visits your stand. Every visitor wears a badge with a unique QR code on it. After scanning this code with the Intercambio Leadscan app, you immediately have all the information you need to follow this lead. You can enrich this information based on questions that each exhibitor can define in the portal. The collected data is shown in the app and is available for download in CSV format through the portal after the event. Upon request a download link to the export file is sent to the exhibitor by e-mail.



# 1. INTERCAMBIO LEADSCAN PORTAL

## 1.1 Portal for exhibitors

Exhibitors log in at <https://leadscan.invitado.nl> with the credentials of their personal Intercambio Leadscan account. If an exhibitor is new to Intercambio Leadscan, he receives an activation e-mail when his e-mail address is added by a client of Invitado. The exhibitor can choose his own password upon activation.

### Users and licenses

As an exhibitor, you create, change or delete users in the **Users tab** as long as licenses are available. Simply enter the name of the user and his e-mail address. For each user you can indicate whether it is allowed to download the export file with the scanned leads through the portal.

When a user is added, he receives a notification about his new role and instructions on how to activate his account via e-mail. This e-mail can always be sent again via the envelope icon in the Users overview.

In the Configuration tab, you can purchase additional licenses if desired. On deletion of a user, the scanned information remains available.

### Define questions

In the Configuration tab, you can create or change questions under Questions. These questions are - apart from a default comment field - shown after scanning a badge on the user's smartphone. For each type of question, a checkbox can indicate whether an answer is required or not. The exhibitor has the choice of three types of questions:

#### 1. Text (one line)

This is an open question, for example to record matters discussed during the conversation with the visitor.

#### 2. Checkbox list

An item can be created here that is provided with a toggle switch in the app. Think of a yes/no or true/false question or statement, such as "The visitor has received the information package."

#### 3. Select list

A question with a pulldown can be generated here. After scanning, the user can only select one of the given options. Think, for example, of selecting a department that should contact the prospect.

## 1.2 Portal for users

Users log in at <https://leadscan.invitado.nl> with the credentials of their personal Leadscan account. If a user is new to Leadscan Intercambio, he receives an activation e-mail when his e-mail address is added by an exhibitor. The user can choose his own password upon activation.

## 2. INTERCAMBIO LEADSCAN APP

### 2.1 Installation and login

- Download the Intercambio LeadsScan app by Invitado Visitor Management on your smartphone:  
For iOS via <https://leadscan.invitado.nl/ios-download>  
For Android via <https://leadscan.invitado.nl/android-download>
- Open the app and log in with your Intercambio LeadsScan credentials of your personal account. A user-role for the e-mail address has to be defined and the account has to be activated in the Intercambio LeadsScan portal first.
- If requested, give the app permission to use the camera function of your smartphone.

### 2.2 Scanning

- If you are a user for multiple events, please first select the event for which you want to scan.
- Now you can start scanning immediately. As soon as a QR code has been scanned, the available data from the visitor database is displayed.
- At the bottom of this screen the user will find the questions defined by the exhibitor and a default field for comments ('Your remarks'). When all required questions have been answered, the scanned lead can be saved with SAVE. After this, the scan screen reappears to scan a new QR code.
- If a QR code is scanned for the second time, previously entered data will be displayed as it was saved after the previous scan.

### 2.3 View and modify the scan data

- In the CAPTURED tab you will find an overview of all leads that have been scanned by the various users of an exhibitor. This overview is sorted by scan date and time, and can be searched using the Search box.
- If you tap on a name, selected data from the visitor database is displayed. This data cannot be modified, but the answers to the questions can be edited. All users can also add their own comment to the scanned lead. Once you have made your changes, tap SAVE.
- As soon as an UPDATE notification appears at the bottom of the screen, it is advisable to refresh the overview screen before editing. You do this by swiping down on this page. That way you know for sure that you have the latest data.