



# Exhibitor Lead Retrieval

Questions?

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This webinar is being recorded.



# How to access your lead retrieval portal

The login and access key are assigned to the booth contact.

Booth contacts can share this login with their team members.

Login to the ASCRS 2025 Exhibitor Portal:

- Purchase Lead Retrieval
- Set-up qualifying questions & custom tags
- Assign licenses
- Pull Lead Scan Reports



## Welcome to the ASCRS 2024 Annual Scientific Meeting Exhibitor Portal

Welcome to the 2024 Exhibitor/Sponsor Portal, where companies and organizations can manage Exhibit Space/Sponsorships

Click here to access the [ASCRS 2024 Exhibitor and Sponsor Prospectus](#) !

Manage your Exhibit Space or Sponsorships:

You may log in to upload your company description, logo, complete tasks and submit payment. All confirmed Exhibitors and Sponsors are required to log in with the Access Key sent in the official booth confirmation email.

We are happy to offer sponsorship opportunities to our exhibitors.

### Log In

#### Rent Exhibit Booth / Purchase Marketing Opportunities

Click **Purchase Exhibit/Marketing** if you have not purchased an exhibit space or marketing opportunity for 2024.

Your access key from previous years will **NOT** allow you to log in.

[Purchase Exhibit/Marketing](#)

#### Manage your Exhibit Space or Sponsorships

[Lost your Access Key? or Need help?](#)

[Login/ Manage](#)

# Lead Retrieval - Purchase

To purchase your first license,  
**Click**

*“Purchase First Lead Retrieval License”*

If you need more than one license,  
**Click**

*“Purchase Additional Lead Retrieval Licenses”*

The screenshot displays the ASCRS 2024 Exhibitor Portal. At the top, there is a banner for the 'ASCRS | ANNUAL SCIENTIFIC MEETING' in Baltimore, MD, from June 1-4, 2024, celebrating the 125th anniversary. Below the banner is a navigation bar with links for 'ASCRS 2024 Exhibitor Portal', 'Log Out', 'Task Progress', 'Informational Links', 'ASCRS Details', and 'Technical Support'. The main content area is divided into three sections: 'EVENT INFORMATION' (with a calendar icon), 'YOUR INFORMATION' (with a profile icon), and 'INFORMATIONAL LINKS' (with a folder icon). The 'EVENT INFORMATION' section lists dates (Jun 1 - 4, 2024), location (Baltimore Convention Center), and a link for more information. The 'YOUR INFORMATION' section has a placeholder box. The 'INFORMATIONAL LINKS' section includes links for the prospectus, insurance form, and lead retrieval information, along with a feedback prompt and a 'Receipt' button. Below these sections is a task list with five items. The first item, 'LEAD RETRIEVAL: Purchase First License', is marked as completed with a green checkmark and is highlighted with a yellow border and a red arrow. The other four items are marked as incomplete with red X's and have green 'Lead Retrieval' buttons next to them.

ASCRS 2024 Exhibitor Portal | Log Out | Task Progress | Informational Links | ASCRS Details | Technical Support

**EVENT INFORMATION** 

**YOUR INFORMATION** 

**INFORMATIONAL LINKS** 

 Dates: Jun 1 - 4, 2024 (Sat — Tue)

 Location:  
Baltimore Convention Center  
Baltimore, Maryland

 More Information: [Website](#)

 [ASCRS 2024 Prospectus](#)

 [Rainprotection Insurance Form for ASCRS](#)

 [ASCRS 2024 Lead Retrieval Information](#)

 We always welcome feedback and want to hear what you like and your suggestions. [Give feedback Now](#)

[Receipt](#)

-  LEAD RETRIEVAL: Purchase First License (completed 11/14/2022, 3:14 PM)
-  LEAD RETRIEVAL: Purchase Additional Licenses (task is due 3/29/2023)
-  LEAD RETRIEVAL: Qualifying Questions (task is due 3/24/2023) [Lead Retrieval](#)
-  LEAD RETRIEVAL: Custom Tags (task is due 3/24/2023) [Lead Retrieval](#)
-  LEAD RETRIEVAL: Assign Licenses (task is due 3/24/2023) [Lead Retrieval](#)

# Lead Retrieval Setup Tasks

Three (3) Lead Retrieval setup tasks will be located on the home page of your portal under “TASKS”.

Click on each task and follow the instructions.

Qualifying questions and tags are optional; license assignment is mandatory

ASCRS 2024 Exhibitor Portal | Log Out | Task Progress | Informational Links | ASCRS Details | Technical Support

**EVENT INFORMATION** 

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[Receipt](#)

 **LEAD RETRIEVAL: Purchase First License** (completed 11/14/2022, 3:14 PM)

 **LEAD RETRIEVAL: Purchase Additional Licenses** (task is due 3/29/2023)

 **LEAD RETRIEVAL: Qualifying Questions** (task is due 3/24/2023) [Lead Retrieval](#)

 **LEAD RETRIEVAL: Custom Tags** (task is due 3/24/2023) [Lead Retrieval](#)

 **LEAD RETRIEVAL: Assign Licenses** (task is due 3/24/2023) [Lead Retrieval](#)

# Qualifying Questions

A task list with three items, each with a green checkmark and a 'Lead Retrieval' button. The first item is highlighted with a red border, and the entire list is highlighted with a yellow border.

- ✓ Lead Retrieval Qualifying Questions (completed 8/29/2022, 11:19 AM) **Lead Retrieval**
- ✓ Lead Retrieval Custom Tags (completed 9/13/2022, 3:04 PM) **Lead Retrieval**
- ✓ Assign Lead Retrieval Licenses (completed 9/20/2022, 1:12 PM) **Lead Retrieval**

Qualifying questions are customized by **company**, not by sales rep

Multiple choice or free entry

10 per company

**Deadline: May 9, 2025**

A screenshot of a web application interface for adding a question. The main window is titled 'Add Question'. It contains a dropdown menu for 'Question Type' with 'Multiple-Choice' selected. Below it is a text input field with the question 'What is the customer's favorite color?'. Underneath is an 'Answers' section with a list of 'Red', 'Blue', and 'Purple'. At the bottom, there are input fields for 'Minimum Answers' (set to 0) and 'Maximum Answers' (set to 1). A red circle highlights the 'Qualifying Questions' section in the left sidebar. The 'SAVE QUESTION' button is at the bottom right.

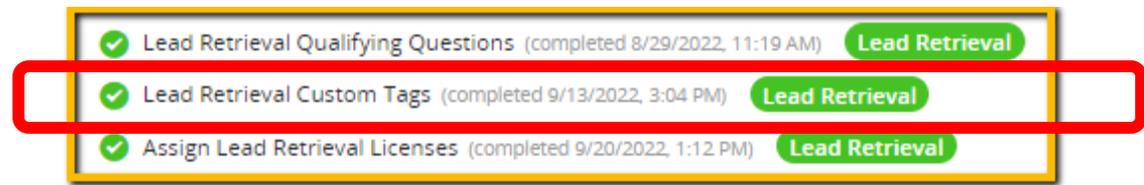
# Custom Tags

Tags are customized by **company**, not by sales rep

Three categories: Qualifiers, Products, Actions

15 tags per category

**Deadline: May 9, 2025**



## LEAD RETRIEVAL: CUSTOM TAGS

Complete Task



(completed 1/17/2023, 10:19 AM)



Please add your lead retrieval tags. These are attributes that your sales reps can optionally attach to each lead. This will help you to qualify your leads and run reports based on the tags on each lead.

Once you have completed this task, click the "Complete Task" button to mark this task as complete. You may return this task any time prior to February 24 to make edits.

**IMPORTANT:** deadline to add custom tags is Friday, February, 24. Tags cannot be added or changed after the deadline.

**All text should be typed in as plain text with carriage returns only. DO NOT COPY AND PASTE. No bulleted lists.**

### Qualifiers

New Prospect  
Current Client  
Past Client  
Special Client

Add as many tags as you would like to, and separate them with carriage returns. The tags will appear to your sales reps in the order you add them. Each tag will be clickable in the mobile app to quickly tag each lead with attributes.

An example of qualifiers are:  
New Prospect  
Current Client  
Past Client

**All text should be typed in as plain text with carriage returns only. DO NOT COPY AND PASTE. No bulleted lists.**

### Products

Product 1  
Product 2  
Product 3  
Product 4

Add as many tags as you would like to, and separate them with carriage returns. The tags will appear to your sales reps in the order you add them. Each tag will be clickable in the mobile app to quickly tag each lead with attributes.

An example of product are:  
Product 1  
Product 2  
Product 3

**All text should be typed in as plain text with carriage returns only.**

# Assign Licenses

Staff **MUST** be registered for the conference before you can assign a lead retrieval license!

Do this via the “Register Your Booth Staff” task BEFORE assigning your lead retrieval licenses!

Email **MUST** match the address used to register for the conference.

**Lead Retrieval Deadline: May 9, 2025**

- ✔ Register Your Booth Staff (Comp/Paid Badges) (completed 2/14/2023, 7:33 AM)
- ✔ LEAD RETRIEVAL: Purchase First License (completed 2/3/2023, 11:36 AM)
- ✔ LEAD RETRIEVAL: Purchase Additional Licenses (completed 2/3/2023, 9:22 PM)
- ✔ LEAD RETRIEVAL: Qualifying Questions (completed 2/14/2023, 3:09 PM) **Lead Retrieval**
- ✘ LEAD RETRIEVAL: Custom Tags (task is due 3/24/2023) **Lead Retrieval**
- ✘ LEAD RETRIEVAL: Assign Licenses (task is due 3/24/2023) **Lead Retrieval**

# Assign Licenses

Staff **MUST** be registered for the conference before you can assign a lead retrieval license!

Do NOT click “Continue” on the task until you have assigned licenses!

|   |   |                |
|---|---|----------------|
| ✓ | Lead Retrieval Qualifying Questions (completed 8/29/2022, 11:19 AM) | Lead Retrieval |
| ✓ | Lead Retrieval Custom Tags (completed 9/13/2022, 3:04 PM)           | Lead Retrieval |
| ✓ | Assign Lead Retrieval Licenses (completed 9/20/2022, 1:12 PM)       | Lead Retrieval |

You have assigned 1 sales rep with access to lead retrieval. You have 1 left to assign.

| #   | Sales Rep                  | Lead Retrieval Activated? | Mobile Device Type       | Lead Retrieval Score |
|---|----------------------------|---------------------------|--------------------------|----------------------|
| Sales Reps With Lead Retrieval Capability ( 1 ) |                            |                           |                          |                      |
| 1   | Finaltest5-26, Testychange | ✗                         | Not activated in app yet |                      |
| Sales Reps ( 2 )                                |                            |                           |                          |                      |
| 2   | Grabowski, Ashley          | ✓                         | Not activated in app yet | 0                    |
| 3   | Leo, Jennifer              | ✓                         | Not activated in app yet | 0                    |

| #   | Sales Rep         | Lead Retrieval Activated? | Mobil  |
|---|-------------------|---------------------------|--------|
| Sales Reps With Lead Retrieval Capability ( 6 ) |                   |                           |        |
| 1   | Kishter, Lacey    | ✓                         | Samsi  |
| 2   | McBride, CJ       | ✓                         | Samsi  |
| 3   | Test ID           | ✓                         | iOS IP |
|   |                   |                           | Not a  |
|   |                   |                           | iOS IP |
|   |                   |                           | iOS IP |
| 7   | Grabowski, Ashley | ✓                         | Not a  |

If this section is blank, you have not assigned licenses

**Ashley Grabowski**  
EMAIL: agrabowski@discoversb.com

Assign License Edit



## Using lead retrieval onsite – Special Notes

Lead retrieval works on Wi-Fi or cellular signals.

Offline scans are held locally on the device UNTIL it reaches Wi-Fi or cellular service.

### Remember...

- Staff can scan offline, but **other staff members will not see those leads until they are back on Wi-Fi or cellular.**
- Offline leads will not appear in post-show reports until the device has internet service.
- **DO NOT** delete the app until your leads have been synced using the WiFi

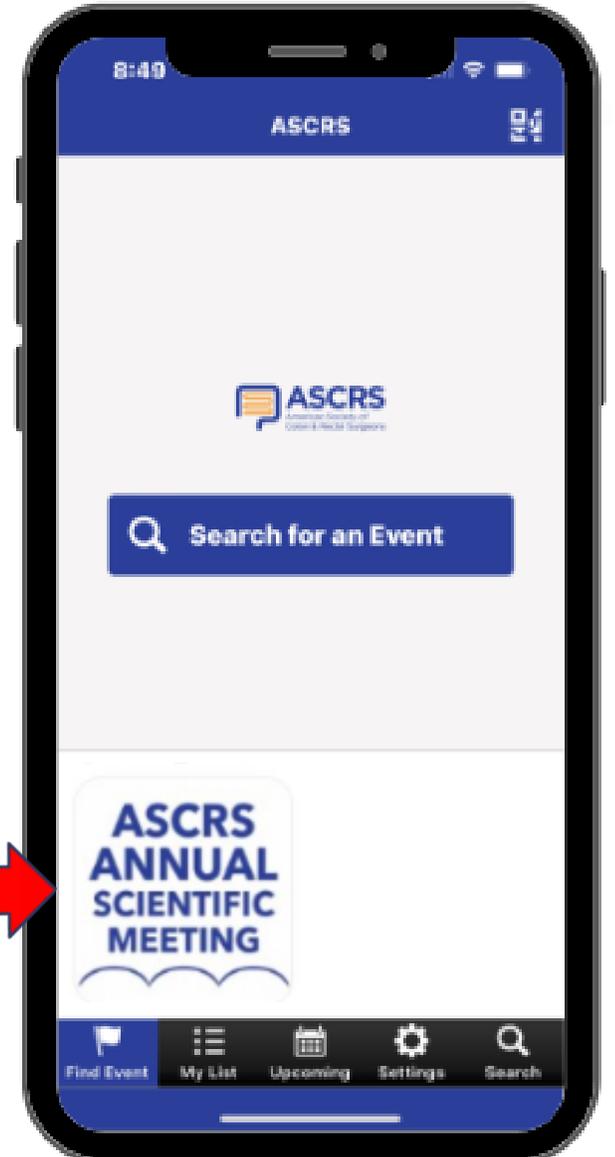
# Using lead retrieval – DOWNLOAD the Event app

Booth Staff....**Do this before arriving in Orlando!**

Download the 2025 **ASCRS Annual Scientific Meeting App**

- App Store: Search for “ASCRS Events”
- Login credentials – Email and Access Key
  - Email with login credentials was sent to all \*registered\* attendees

App is available soon for iOS and Android!



# Using lead retrieval onsite

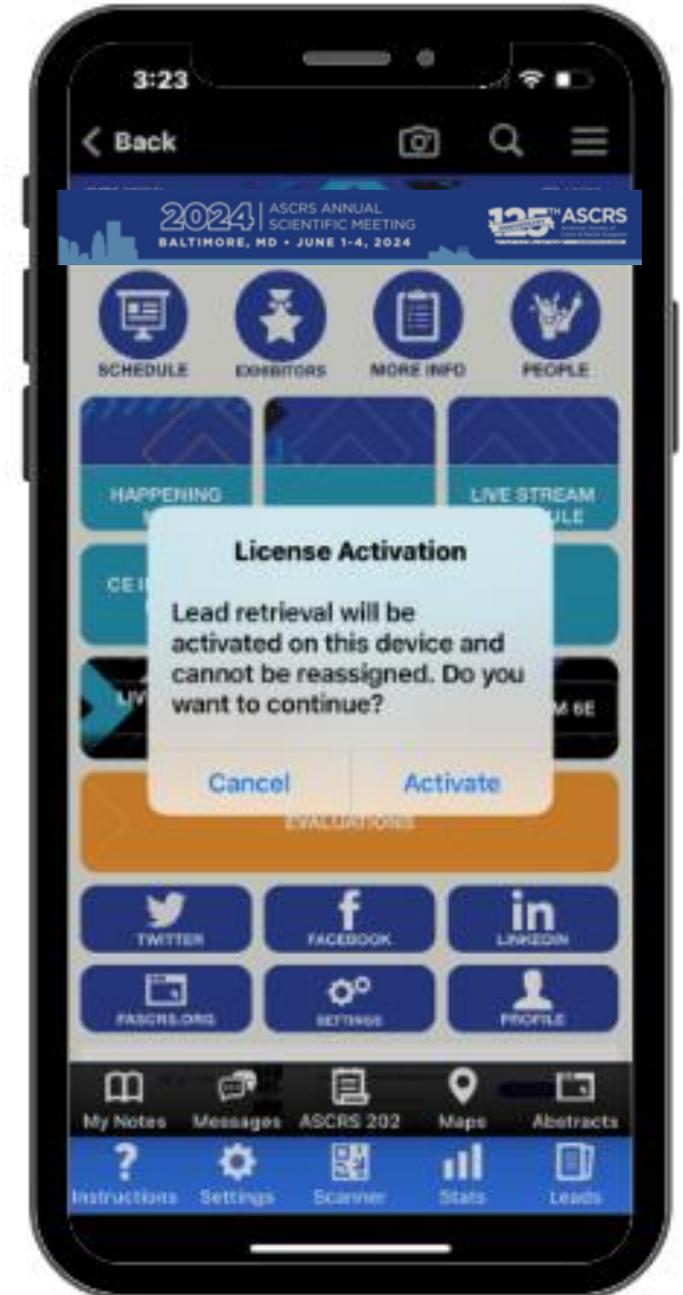
If you've been assigned a Lead Retrieval license through the Exhibitor Service Center

## YOU WILL SEE

a **BLUE** bar at the bottom of your screen.

“Scanner” button opens the QR code reader

“Leads” button shows scans for **all** company sales reps



# Using lead retrieval onsite

When you FIRST select the “Scanner” button,  
*You will see this License Activation popup.*

Click “Activate” and then the license will be assigned to YOUR device.

*Booth staff will ONLY see this message the first time.*



# Using lead retrieval onsite

**THIS LICENSE SHOULD ONLY BE ACTIVATED ON ONE DEVICE.**

*(i.e. your team member is using an iPhone for personal use and company iPhone for scanning with their same credentials)*

**Leads WILL be LOST if you use the same login credentials to activate all the lead licenses.**

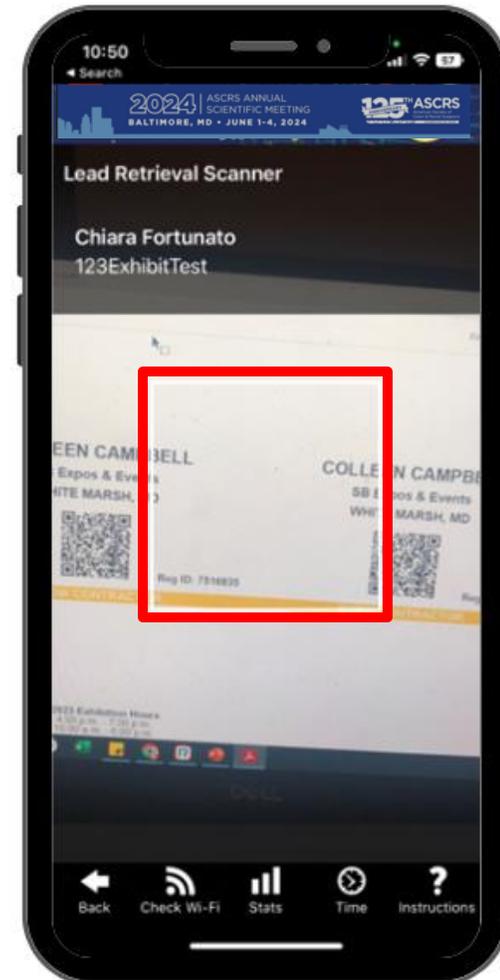


# Using lead retrieval onsite

1. Click “Scanner” button



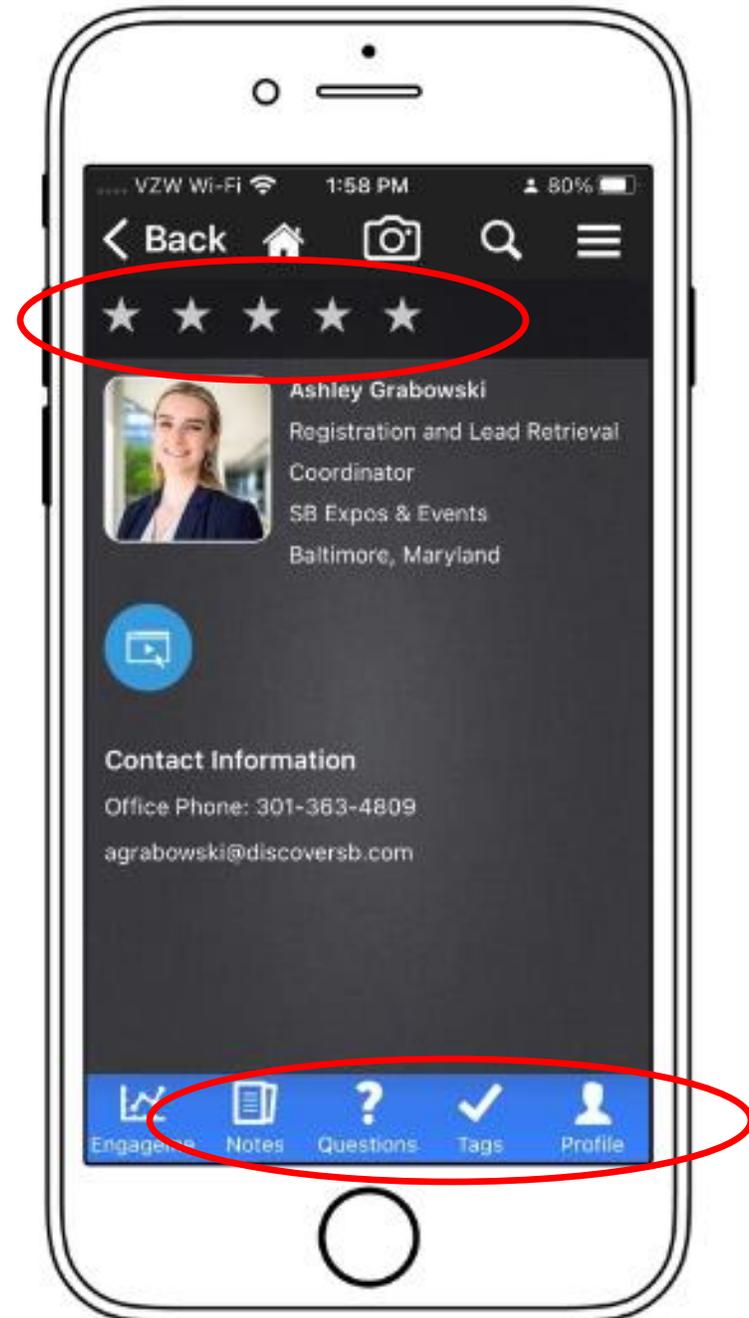
2. Align QR code in view

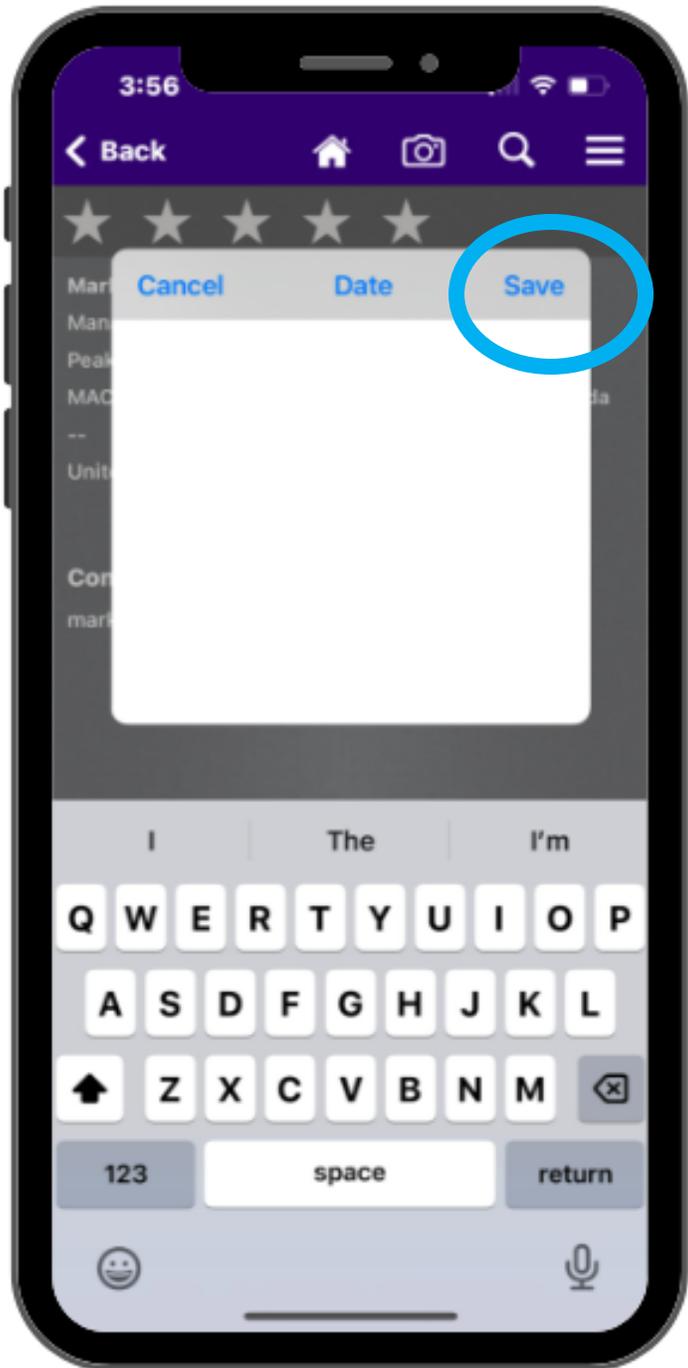


# Using lead retrieval onsite

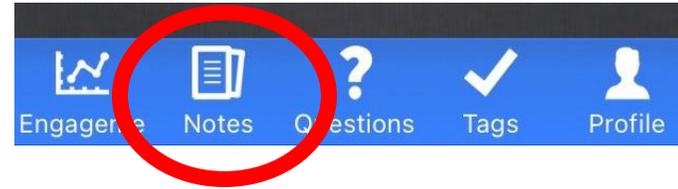
After attendee is scanned, several options available

- **Notes:** Free entry field
- **Questions:** Answer qualifying questions that admin set up in Tasks
- **Tags:** Select tags that admin set up in Tasks
- **Profile:** Make edits to the attendee's profile.
- 1-5 stars

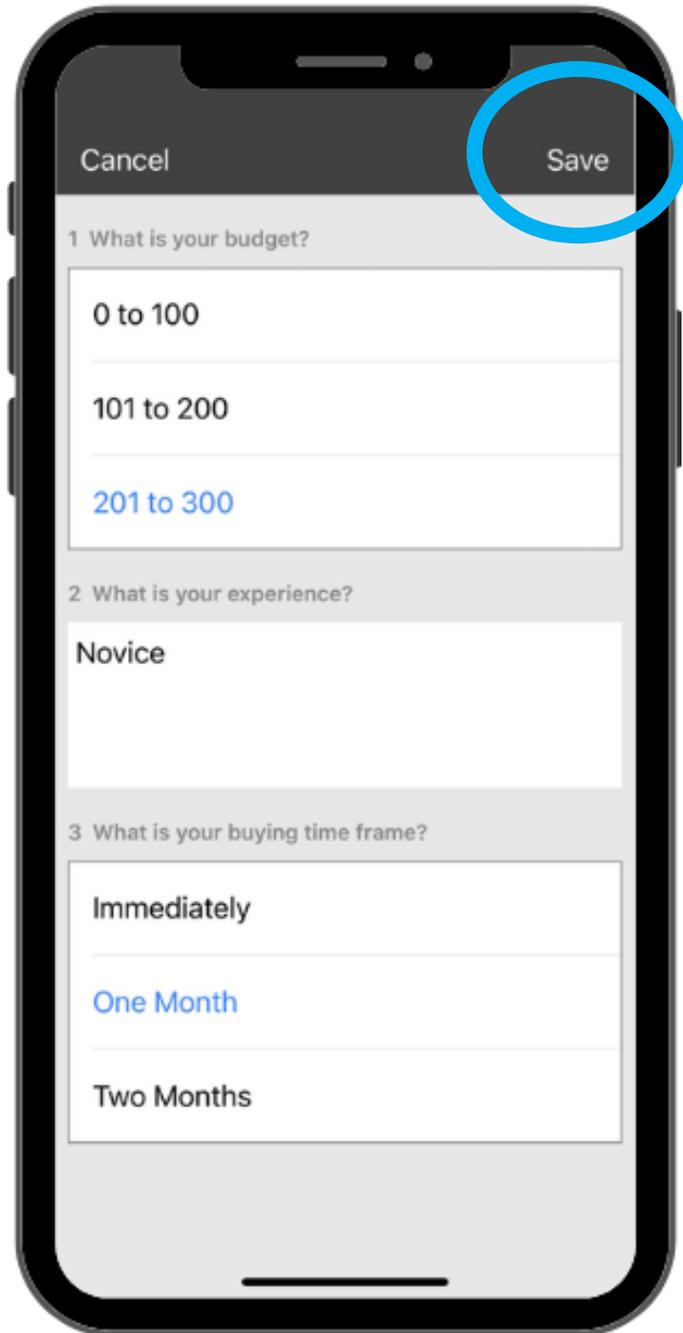




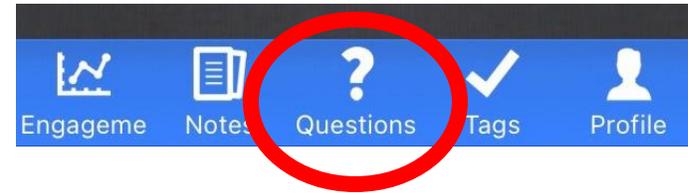
## Using lead retrieval onsite - NOTES



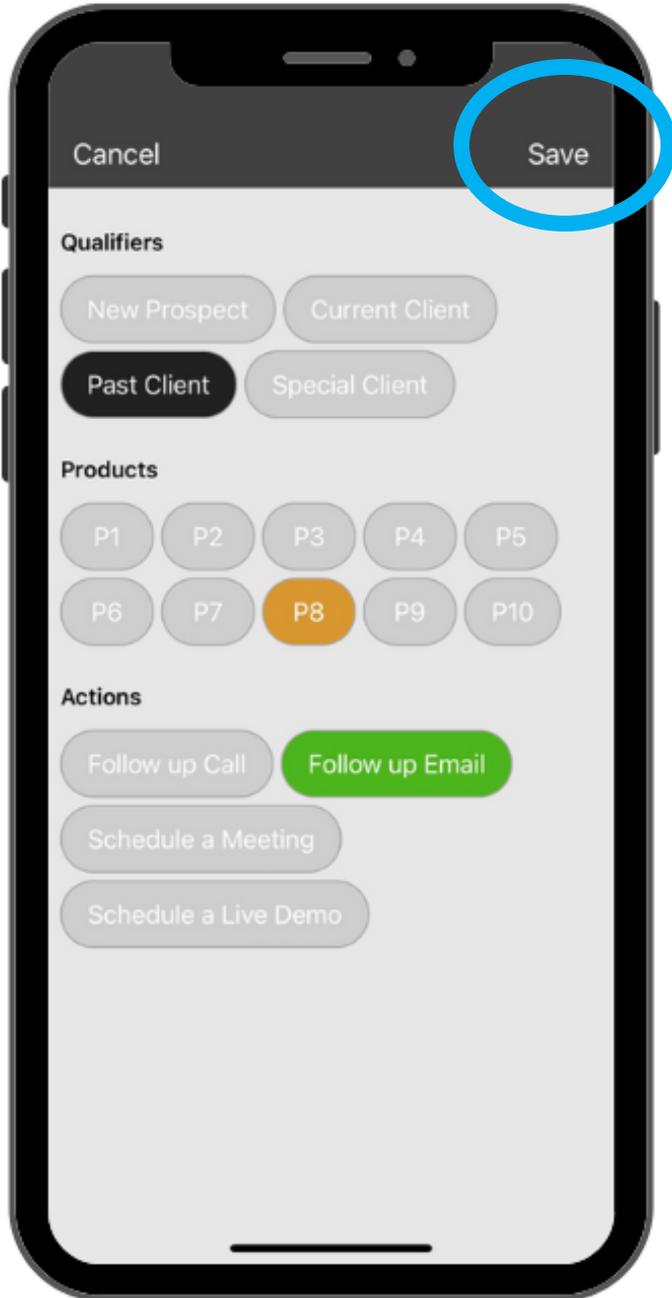
- Include any notes about the customer
- HIT "SAVE" at the top right



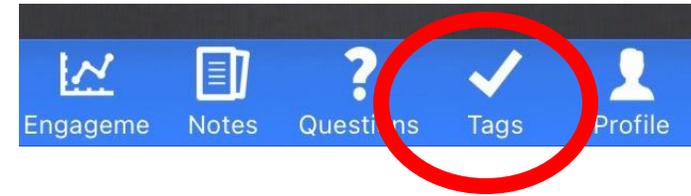
# Using lead retrieval onsite - Questions



- These are the qualifying questions you've loaded into the portal
- Select answers and answer turns BLUE
- HIT "SAVE" at the top right

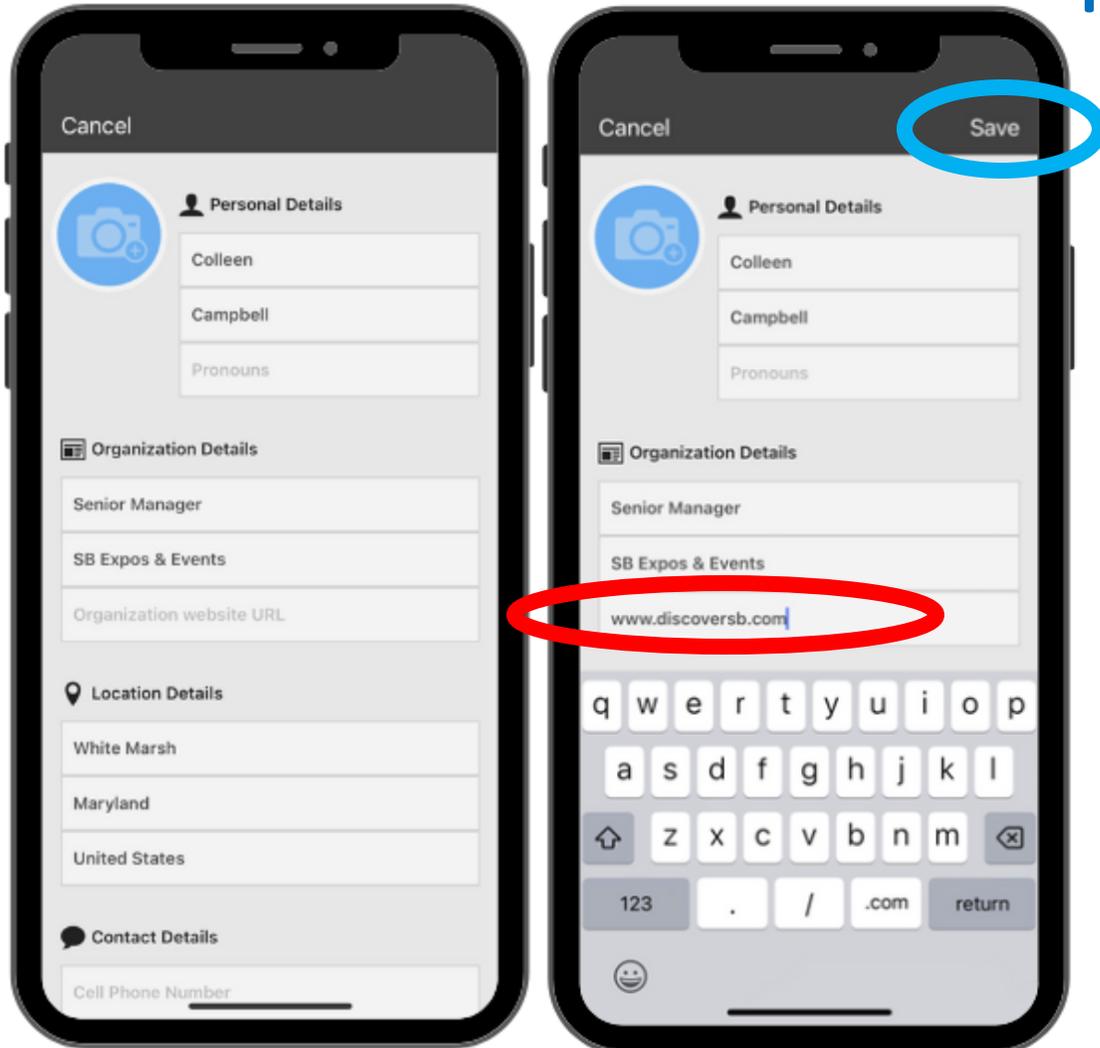
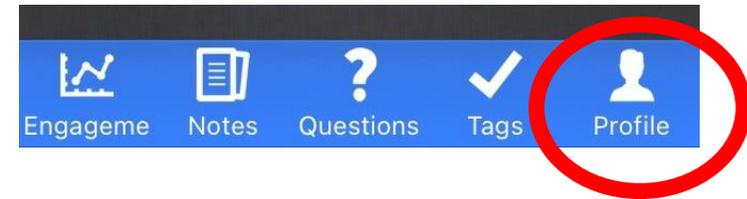


## Using lead retrieval onsite - Tags



- These are the tags you've loaded into the portal
- Select answers and answer turns a color
- HIT "SAVE" at the top right

# Using lead retrieval onsite - Profile



- These fields are pre-populated from what the attendee entered into registration
- You can ask them for any other information you want
- HIT "SAVE" at the top right

# Checking Leads Onsite – Offline Warning



Alvarez, Jill





**ASCRS ANNUAL  
SCIENTIFIC MEETING**  
San Diego, CA • May 10-13, 2025

## Checking Leads Onsite

### **Check Leads Often and Reports**

Onsite sales representatives should use the "Leads" section to confirm leads **before leaving the exhibit hall or disconnecting from the Wi-Fi.**

Booth administrators use the ACSRS 2025 Exhibitor/ Sponsor Portal to review your collected leads and ensure they synced correctly.

**If the admin cannot access the portal during the conference, they can share the access details with an onsite representative.**



# Accessing Post-Show Reports

- Login to the ASCRS 2025 Exhibitor Portal
- Two Excel Reports
  - Unique Leads
  - All Scans with notes

IN PERSON EVENT LEAD RETRIEVAL

 Booth 9999 (2 sales reps performed 6 scans and acquired 6 leads.)

Lead Retrieval Report - Unique Leads

Lead Retrieval Report - All Scans







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## **1. Remind sales staff to:**

- Ask permission before scanning an attendee's badge.
- Review your scanned leads before leaving show floor to ensure you captured all the information.

## **2. Utilize all of the qualifying features that are available to get the best post-show data:**

- Stars
- Notes
- Custom qualifier questions
- Tags



## When You Arrive in Orlando

**YES - You CAN purchase licenses on-site**

- \$475 for the first license
- \$260 for each additional license



**ASCRS ANNUAL  
SCIENTIFIC MEETING**  
San Diego, CA • May 10-13, 2025

- The Lead Retrieval desk will be staffed during the following hours:

**Saturday, May 10: 8am - 5pm**

**Sunday, May 11: 8am - 3:30pm**

**Monday, May 12: 8:30am - 4:00pm**

- After Monday, May 12, please email [ascrsleads@discoversb.com](mailto:ascrsleads@discoversb.com)