Cadmium

Lead Capture Exhibitor Troubleshooting Guide

This guide provides step-by-step answers to common questions exhibitors have about accessing, configuring, and using the Lead Capture portal and mobile app at your event.

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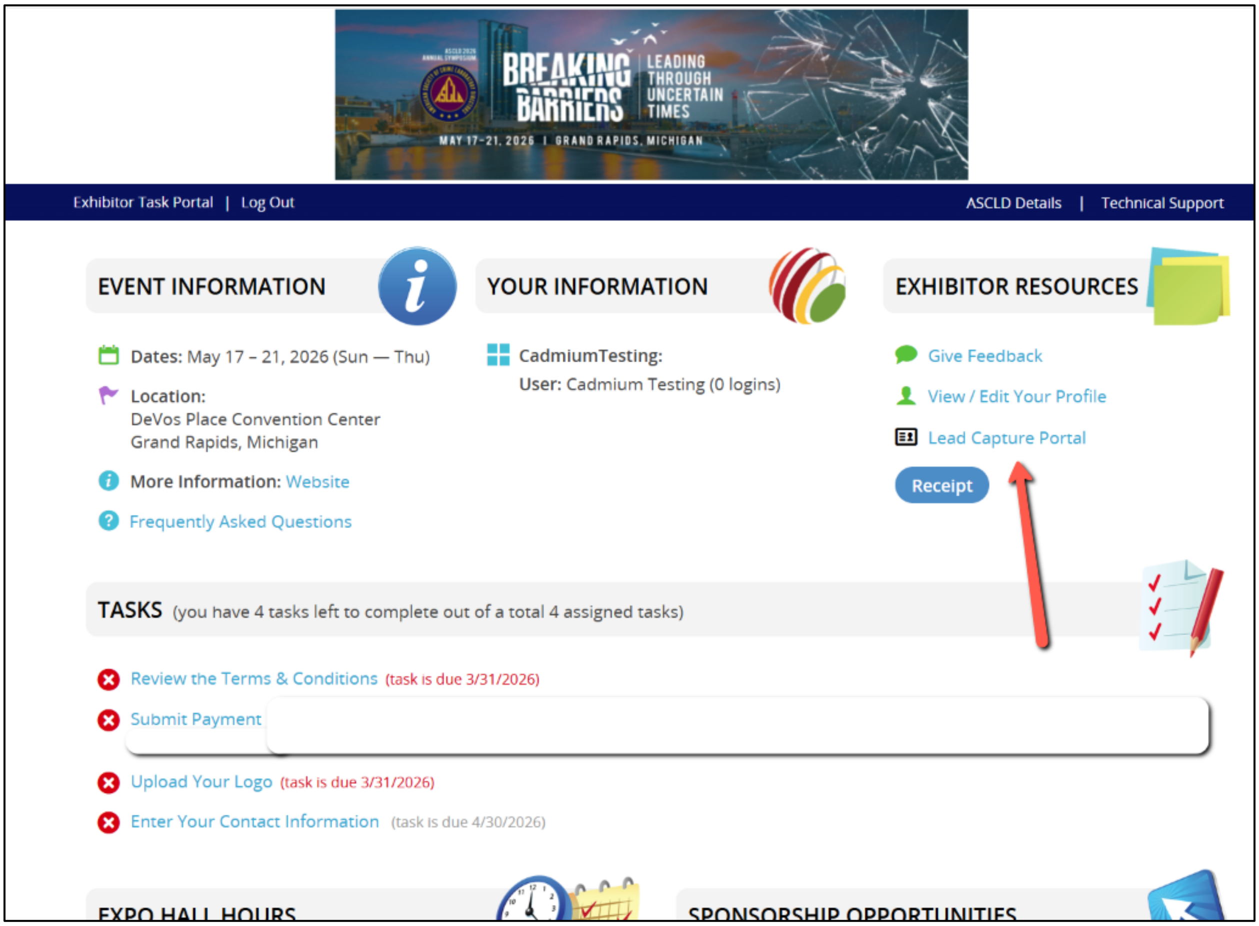
A Comprehensive Lead Capture Exhibitors Guide is also available.

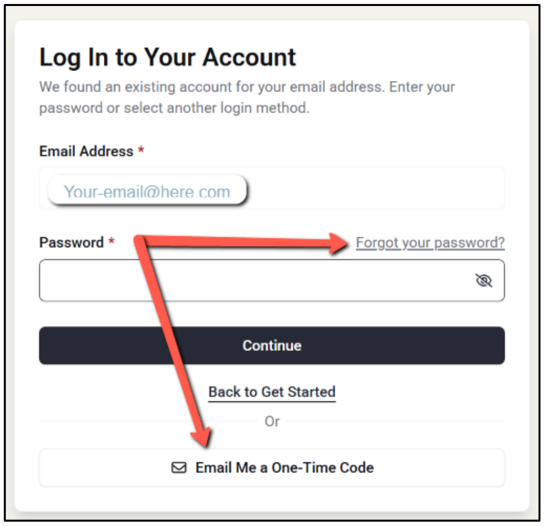
How do I access the Lead Capture portal from my booth management screen? 1.0

Follow these steps to access the Lead Capture portal:

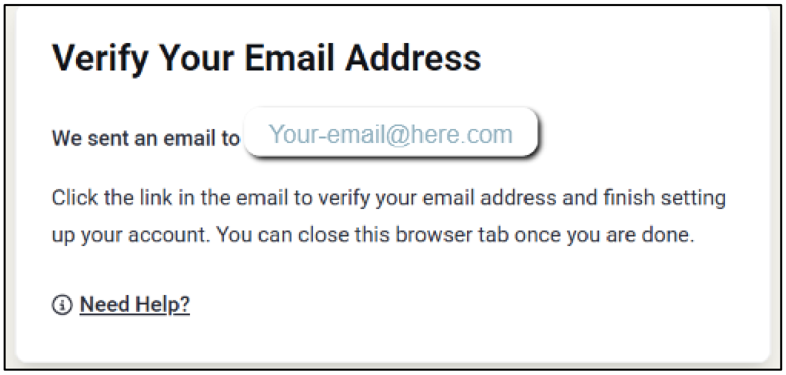
1. When you log into the Booth Management portal, you should see an option to access your Lead Capture Portal in the third column under Exhibitor Resources at the top of the page.



2. On the Lead Capture Portal, you will be asked to enter your email address. If you already have a Lead Capture / Cadmium Identity login account, the system will prompt you for your password and offer you options to reset it if you have forgotten.



If you do not already have an account, the system will send you an email walking you through creating your new account.

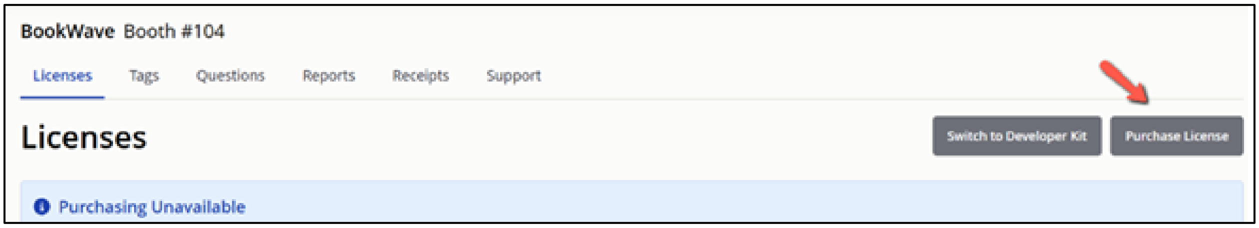


NOTE: This account is separate from your Exhibitor Portal account and will not expire after the event.

How do I purchase licenses for my team?

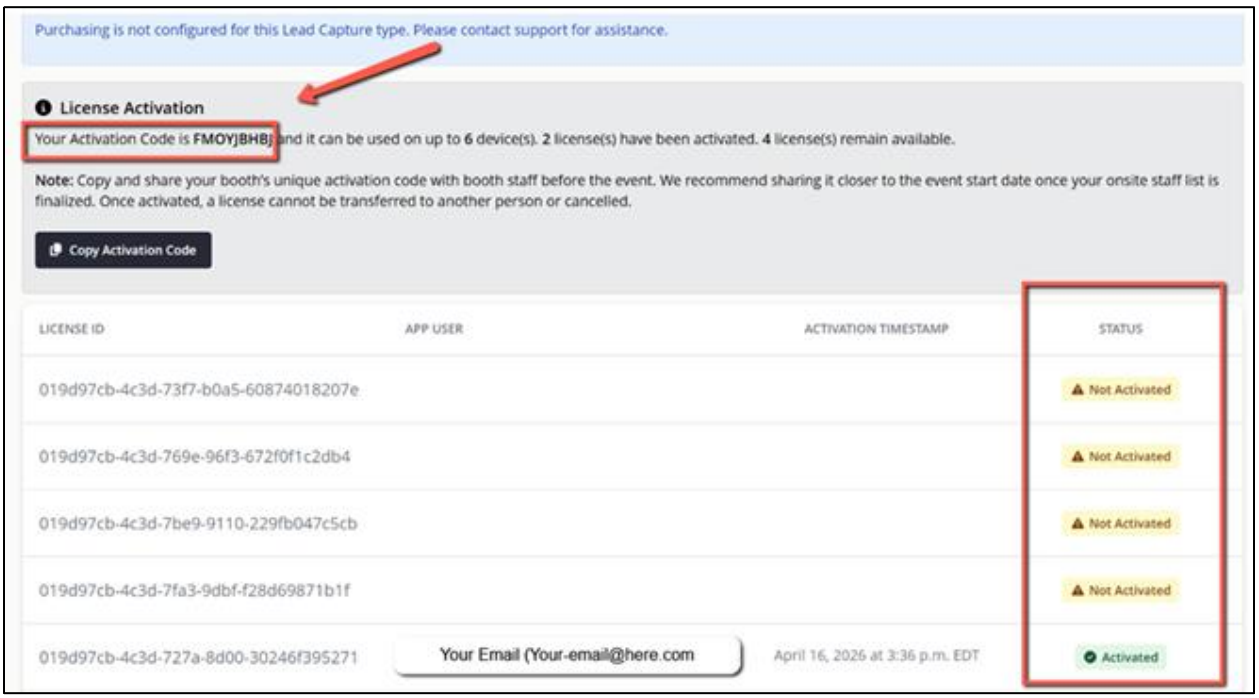
Once you have logged into the Lead Capture portal:

1. The system should take you directly to the Licenses tab / screen.
    a. There should be options in the right-hand corner of the screen to Purchase licenses at the current conference rate. A more detailed Overview of Lead Capture Licenses is also available.



You will also see your:

    b. License activation code you will need to provide to your agents attending the conference,
    c. Any licenses (license ID) your company currently has
    d. The status of those licenses.



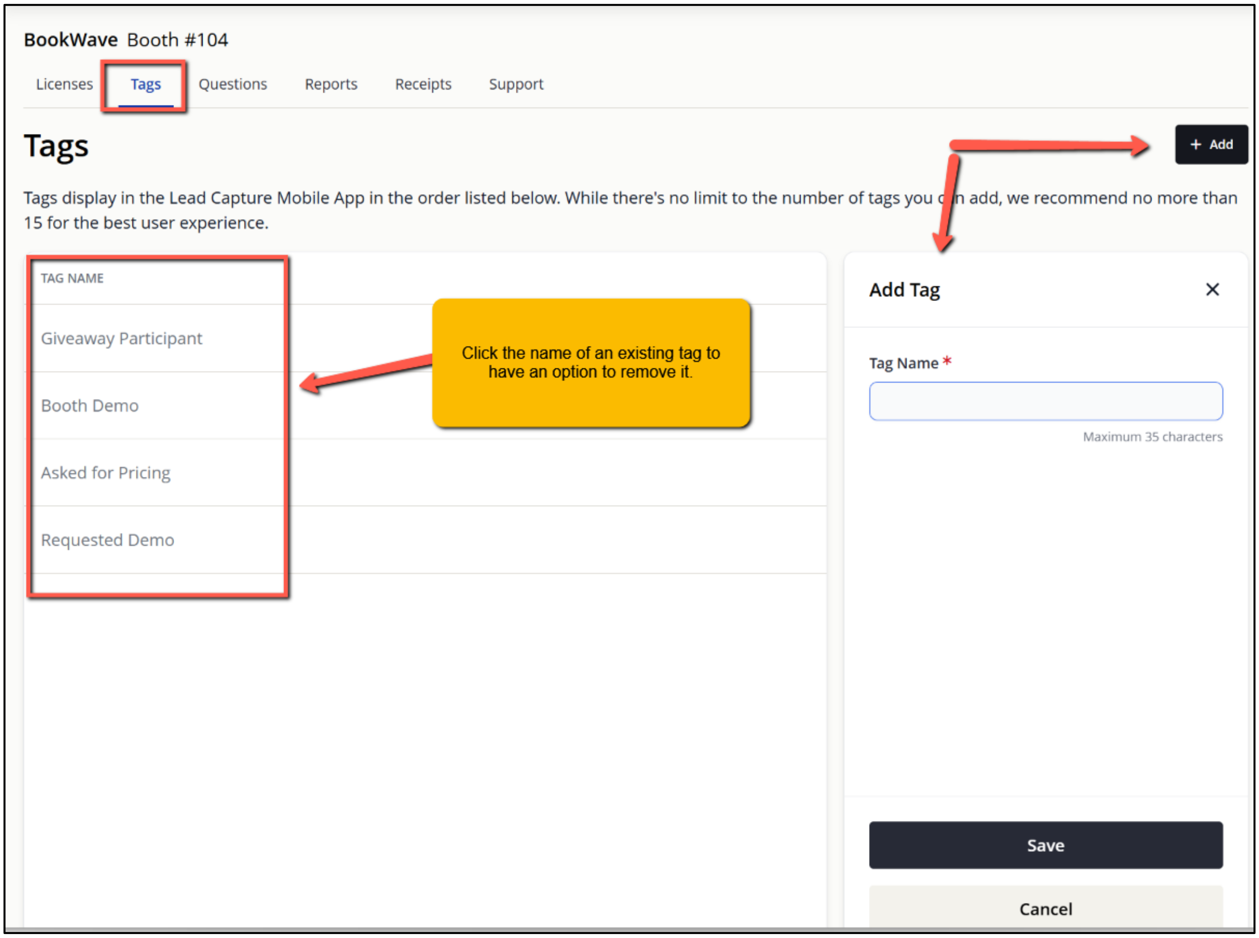
2. There is also an option to switch and use a Developer Kit if you need to integrate the data into your own existing system. *(You will need to contact the sale rep if you would like to purchase this option instead of purchasing and assigning Lead Capture licenses.)*

Additional **Exhibitor Portal Overview** materials can be found here.

How do I add lead retrieval tags?

Lead retrieval tags allow your agents to quickly record responses and categorize leads when scanning badges. [To add or manage tags](#):

1. Open the Lead Retrieval Tags tab. You will see a list of all tags already created for this conference.
2. Click the + Add button at the top of the page.
3. Type in the name of the tag you want to make available to your agents and click Save.
4. To edit or remove an existing tag, click on the tag name and select Edit or Remove.

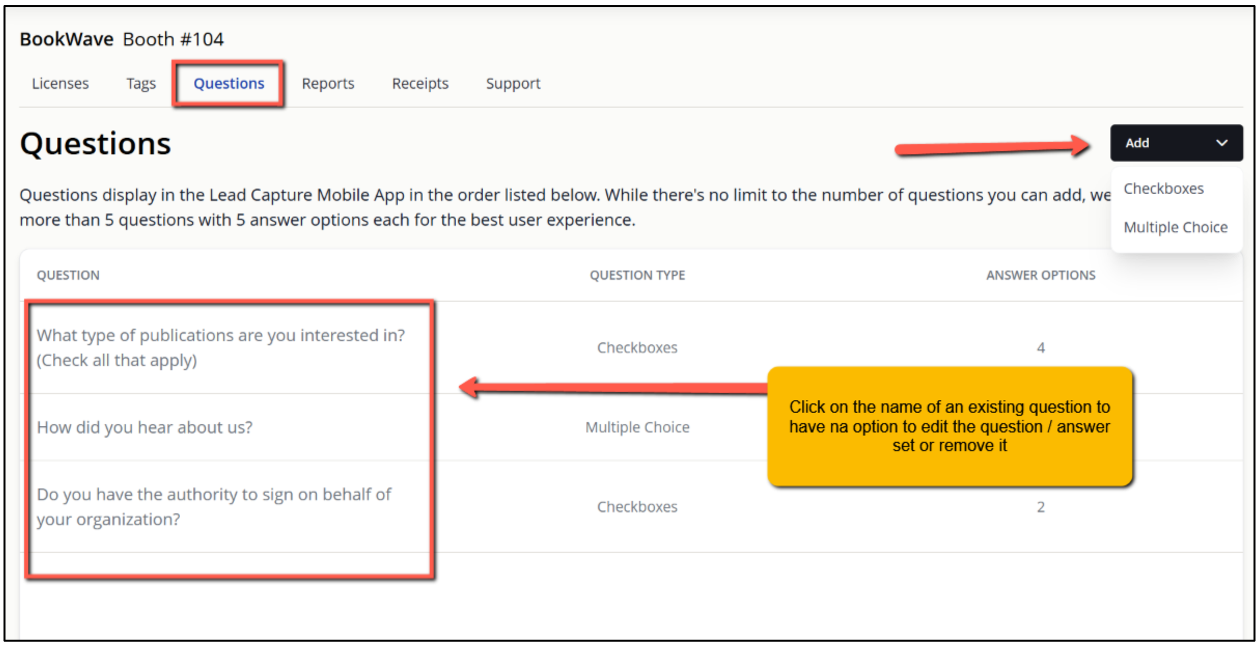


NOTE: Agents can apply more than one tag to a scanned lead.

How do I add questions for my agents to ask potential leads?

Custom questions allow your agents to collect structured qualification data when scanning badges. To add questions:

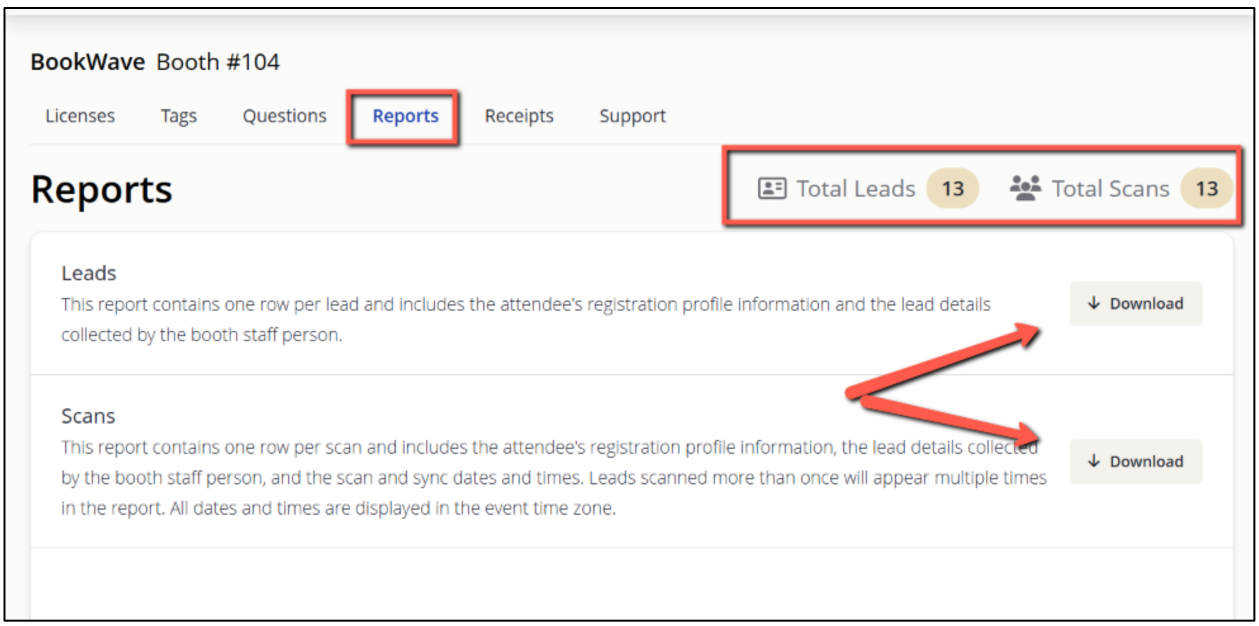
1. Open the Lead Retrieval Questions tab. You will see a list of all questions already created for this conference.
2. Click the Add button at the top of the page.
3. **Select the question type:**
    a. Checkbox (Check all that apply) allows the lead to select multiple answers.
    b. Multiple Choice (Select 1 from the list below) allows the lead to select a single answer.
4. Type in the question text and all answer options, then click Save.
5. To edit or remove an existing question, click on the question name and select Edit or Remove.



How do I access my Lead Capture reports?

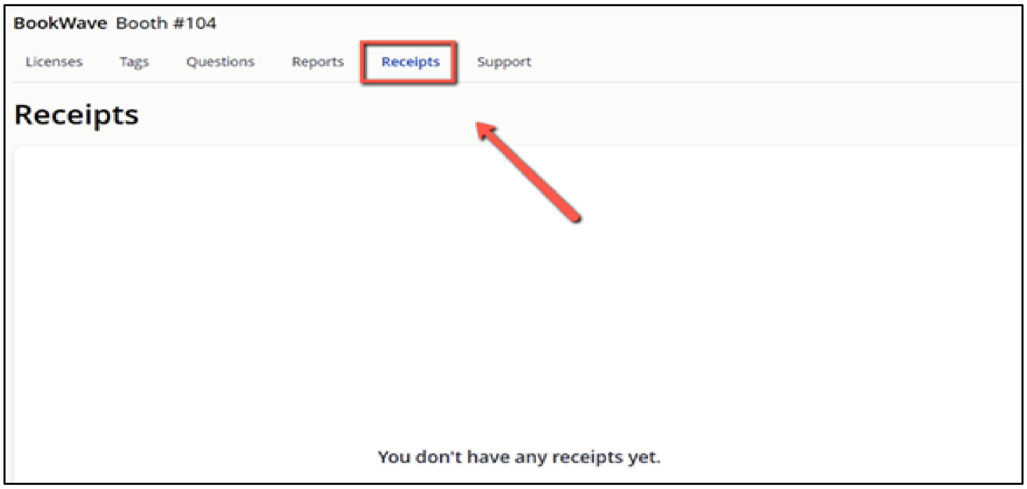
To download your lead data after the event:

1. Open the [Lead Retrieval Reports tab](). You will see two report options available as spreadsheet downloads:
    a. Leads — A list of all unique leads scanned by your agents during the event.
    b. Scans — A list of every badge scan by all agents, including repeat entries if an attendee was scanned more than once.
2. Reports typically include the following information for each lead:
    a. Name of the scanning agent
    b. First and last name of the lead
    c. Preferred pronouns (if provided)
    d. Occupational title (if provided)
    e. Organization name
    f. Email address
    g. Work or cell phone number (if provided)
    h. Mailing address
    i. Agent notes
    j. Tags selected by the agent
    k. Custom questions and the lead's responses



Can I access the receipt for my Lead Capture purchase?

1. Yes, click on the Receipts tab at the top of the Lead Capture portal page to view any receipts available for your purchase.



How do my sales reps activate their licenses?

Sales representatives activate their licenses using the Eventscribe Lead Capture mobile app. Follow the steps below:

1. **Download the app:** Download the Eventscribe Lead Capture mobile app from the Apple App Store or Google Play Store.

Download on the App Store

Eventscribe Lead Capture

GET IT ON Google Play

2. **Log in:** Log in to the app. If the agent does not yet have a Lead Capture / Cadmium Identity account, they will be prompted to create one.
3. **Enter the activation code:** Activate the license using the activation code provided by the booth administrator. (Administrators can locate this code at the top of the Licenses tab in the Lead Capture Portal.)
4. Start scanning attendee badges and capturing leads.
5. Add notes and qualification tags to each lead as needed.
6. View captured leads in the mobile app, or access them through the Lead Capture Exhibitor Portal for export and follow-up.

NOTE: The Eventscribe Lead Capture app is separate from the general attendee mobile app. Agent accounts will not expire and can be reused for future events.