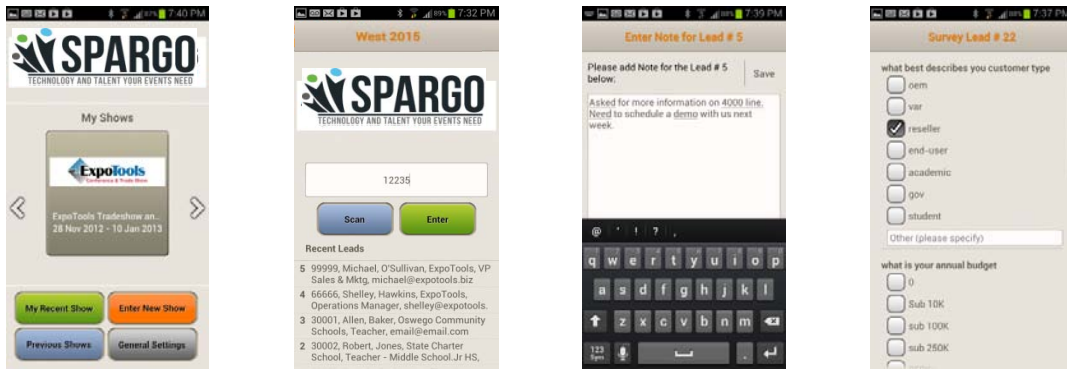


DirectLead™ Rover User Guide



DirectLead™ Rover is an application that can be used to scan, qualify and survey attendees at events and trade shows using smartphones or tablets. It is compatible with most Apple and Android devices.

Installation and Setup

You must first download and install the application from the appropriate app store. You can just search for 'expoleads mobile' on either store. Alternatively, you can scan one of the links below:

For Apple/iOS devices:

<https://itunes.apple.com/us/app/jspargo-directleadrover/id878177657?mt=8>



For Android devices:

<https://play.google.com/store/apps/details?id=com.directleadrover>

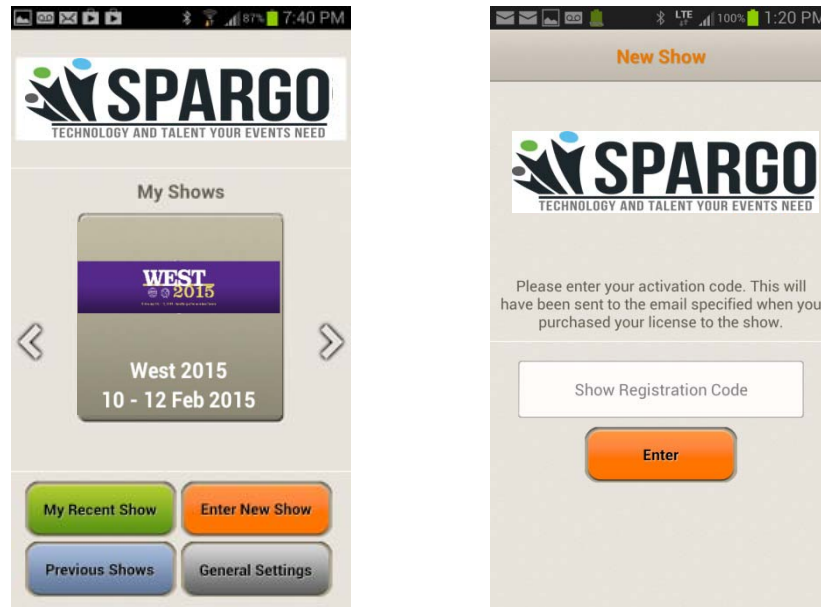


Once installed, you will need your *activation code*. You can find this in the confirmation email that was sent out when you signed up for DirectLead™ Rover use:

You will need to download the application before your show. You can do this from [Google Play](https://play.google.com/store/apps/details?id=com.directleadrover) for Android devices or [iTunes AppStore](https://itunes.apple.com/us/app/jspargo-directleadrover/id878177657?mt=8) for Apple products.

Please note that once used, an activation code is not transferrable to a different device. Only use activation codes on devices you plan to use at the show.

Once you have located this, run the application and select 'Enter New Show'; this will bring you to the screen where you can enter the activation code.



If using cut-and-paste to copy over the code, be careful not to select anything other than the activation code itself. Some email programs like to grab spaces, line feeds or other things when using cut-and-paste. If you have problems pasting it, just typing it in directly.

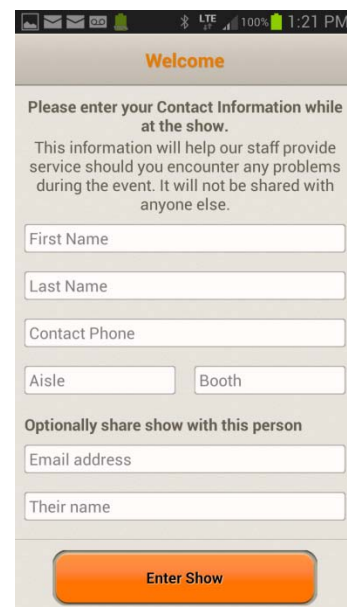
You will be asked for your name, booth number and aisle number. This information is used to help identify scans by specific users (when more than one license is being used) as well as to provide service. It is not shared with anyone.

If you do not know your booth or aisle number at this time, you can leave it blank and fill it in later.

You can also share all the data from the show with someone else, such as a colleague or an inside sales person. To do so, just type in their email address and name in the 'Optionally share show with...' email box. An automated message with login details to the web-portal will be sent to that email address. From there they can access all the show data, including notes and qualifiers. Note that this step is optional.

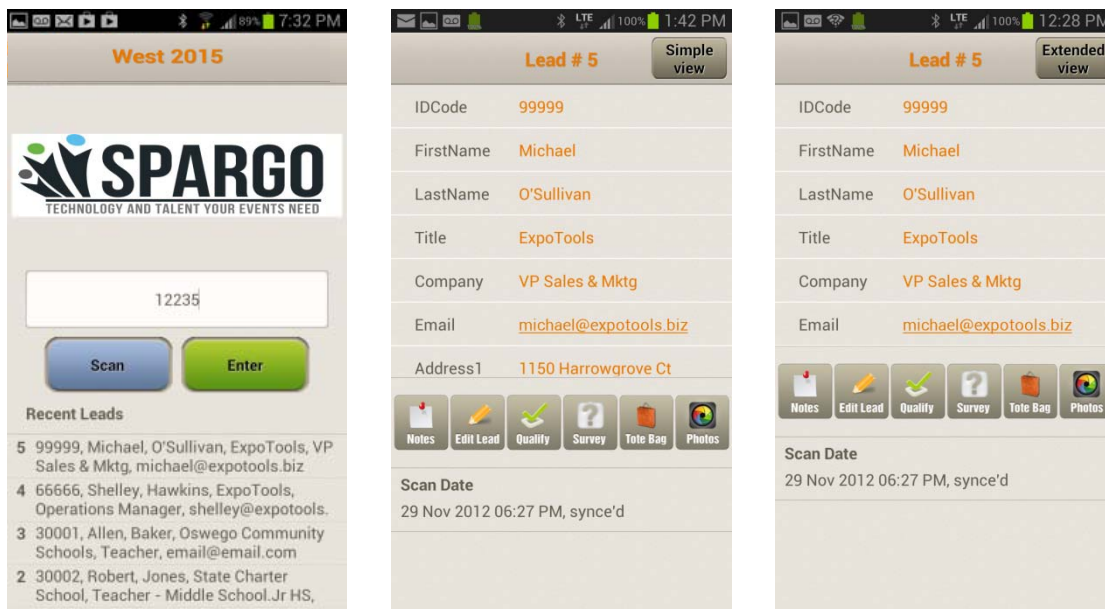
Once activated, the app will try to download a copy of the show information and database. This should only take a few seconds.

If you need to change any of this profile information later, you can do so from the show settings screen.



Using DirectLead™ Rover

Lead capture is quick and easy with DirectLead™ Rover and can be done in two ways. You can either enter the ID number manually or scan the barcode from the badge. Devices have varying abilities when it comes to scanning, especially with regard to focusing, so there is a bit of a knack to this and not all devices are suitable. Typically, holding the device about four inches away from the barcode is a good distance, but that depends upon the device.



Once captured, DirectLead™ Rover will display the contact information for that prospect (you can also see these detail by tapping on it from the scanning screen).

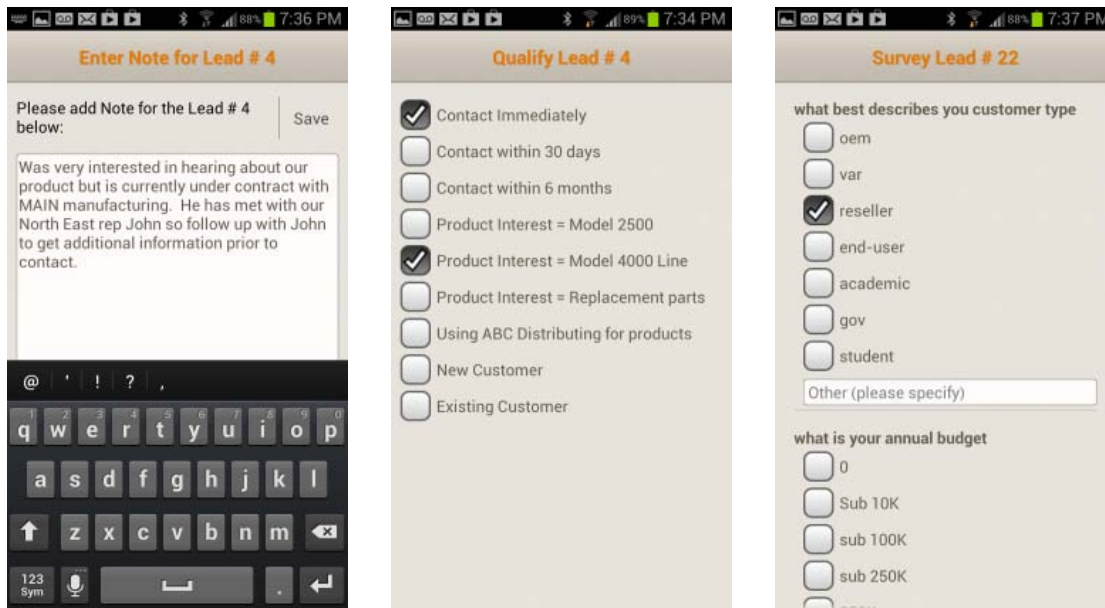
You can switch between a more or less detailed view using the 'extended view' or 'simple view' button at the top right. This can be helpful for devices with smaller screens.

To capture another lead, just go back to the scan screen using the 'Back' button (on Android devices) or the 'back to show' button in the title bar (on iOS devices).

Qualifying Leads

The most important part of the lead capture process is qualifying them right then, right there. That's the difference between leads and names in the phone book.

DirectLead™ Rover lets you do this in three ways: entering notes, checking of qualifiers or running a full blown survey. You can access any of these from the Lead detail screen by pressing any of the three corresponding icons.

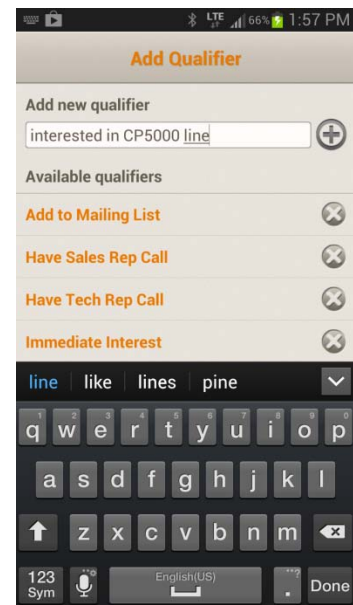


This information is automatically added to the lead and will be available in the digital file. No more handwritten notes!

Adding New Qualifiers

Qualifiers can be preloaded by your service provider before the show, but you can also add or create them yourself, either from the app itself or from the web portal.

To add them from the app, go to the qualifier screen, press the 'Menu' button on Android devices this is the physical menu button, on iOS it is an on-screen one). From there, select add qualifier.



Creating Surveys

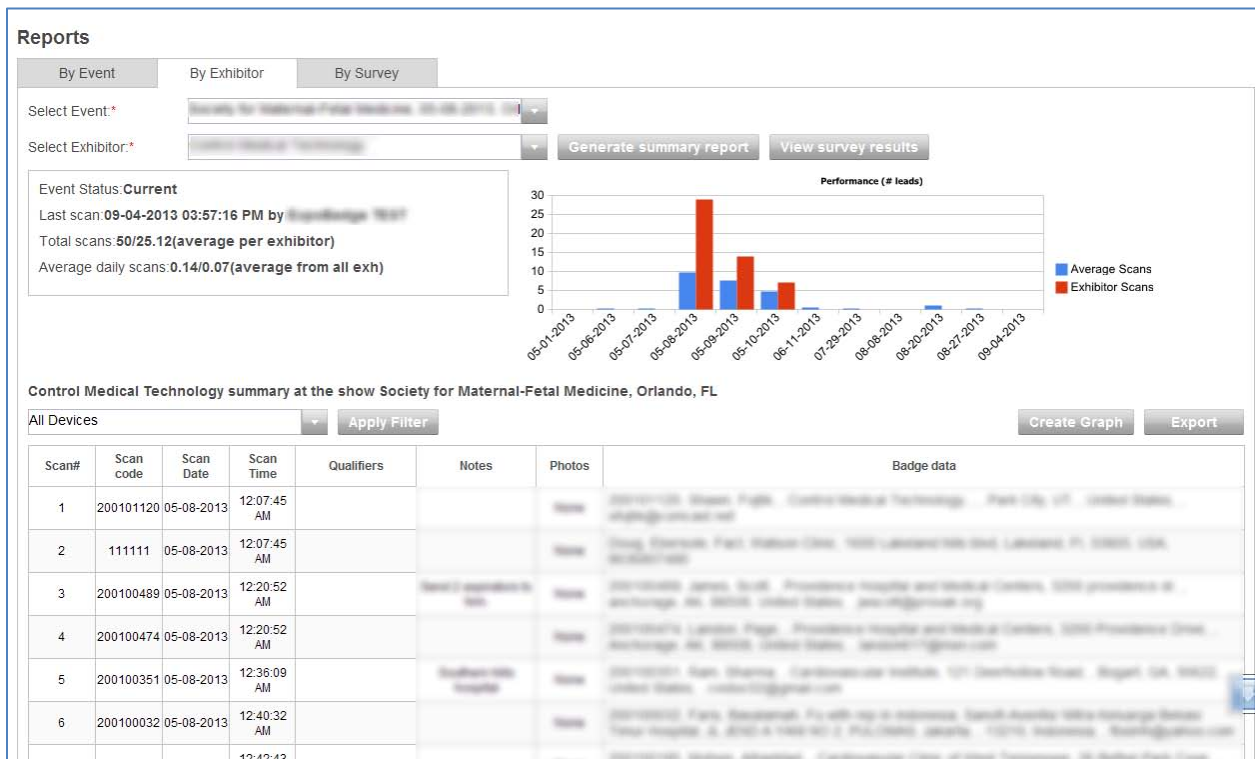
Surveys can be preloaded by your service provider or created by you. While the web portal makes it easier to type things in, nothing beats the immediacy of adding a survey question right from the show floor.

On Android devices, press the menu button from the surveying page and choose 'Add New Survey Question'. For iOS devices, this button is available directly from the surveying screen.



Web-Portal

Your Welcome to DirectLead™ Rover also includes a link and login details to the DirectLead™ Rover web-portal. The portal allows you to see all the data scanned from all of the devices used under the same registration code. It also allows you to download a copy for use with in-house databases or CRM solutions and to view your day-to-day performance and compare it to the show average.



Advanced Features: Syncing, Off-line Mode and Following-up

Advanced features are available from the scan screen menu. This can be accessed directly from the on-screen icon for iOS devices, or by pressing the 'menu' button on Android devices.

Syncing

DirectLead™ Rover automatically checks in with the server whenever you scan or update a lead. However, it also keeps a copy of the data internally for when the data connection is not available. Although not usually necessary, you can re-sync both sides manually whenever you wish using the Sync feature.

Offline Mode

DirectLead™ Rover automatically switches between the on-line database and the local one based upon the availability of a data connection. If the data connection is present but unreliable, this may become slow. In these cases, you can switch to offline mode. In this mode, the application will not attempt to use the on-line database even when a data connection is available. The downside is that your data will not be available on the web-portal until you manually invoke the Sync function described earlier.

Note that this feature is not used under normal circumstances. It is meant for when a data connection is present but throughput is inadequate.

Emailing Your Leads to Someone

If you want to send a copy of the leads to yourself or someone else, you can do that directly from the application. Just choose the Email Leads option from the menu in the scan screen.

Following-up Features

ExpoLeads Mobile has two features that make following up on a lead easier.

These are **sending an email to a prospect** directly from the lead detail screen and **adding a prospect to your contacts** list. Both of these are available from the Lead Detail screen menu. This screen also lets you search for a specific prospect or add photos to the current lead.

