EDspaces
Designing the Future of Education

LEAD CAPTURE STEPS

APP LOGIN

1 Open the EDspaces Connect App on your iOS or Android device:
- First time logging in? Click here or scan this QR code to begin.
- Log in using your registered email address and badge ID as password.

2 Complete Onboarding:
- Create a password to log into the app and follow the prompts through the onboarding process until you reach the Claim Your Team step.

3 Claim Your Team:
- You must claim your team to access your team's lead data, rate leads, and add notes.
- Click the My Team button in the top-right corner to open the team portal.

4 Lead Capture / Badge Scanning:
- Use the Lead Capture / Badge Scanning button at the top of the app to start scanning badges. When you scan a badge, you gain immediate access to the attendee's profile information through the app web portal. Leads can be captured through badge scanning, expressed interest, or confirmed meetings.

5 Score Leads
- After the event, all scores and notes from badge scans are seamlessly included in your contact export list

6 Export Leads
- You must export through the app web portal in My Team, not the mobile app. To ensure you export full contact information for each lead, confirm that a team member has already claimed your Team.

Require immediate assistance? Please reach out to us at mobileapp@emeraldx.com.

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MANAGE YOUR TEAM IN THE EDSPACES CONNECT WEB PORTAL: A QUICK GUIDE

Maximize your experience by managing your team through the EDspaces Connect Event App's Web Portal! Take these steps to make the most out of the My Team Portal functionality.

1 Claim Your Company's Team

a. The first person from your company to log into the Web Portal will automatically claim your team.
b. This person becomes the Team Admin, responsible for managing team members and their access.
c. The first person to log in should be prepared to take on this role, as they will have full control over the team management process.

PRO TIP: If you need to transfer the team admin role to someone else, the current admin can easily assign the role to another team member.

2 Access the My Team Portal

a. Once logged in, navigate to the My Team section from the dashboard.
b. This portal provides an overview of your team's activity and engagement with event attendees.

3 Add or Remove Team Members

a. Add Team Members: Select Invite Team Member and enter their details.
b. Remove Team Members: Click on the team member and select Remove from Team.

4 Manage Team Roles

a. Assign different roles to your team members (Admin, Manager, or Member) to control their access levels within the platform.
b. Admins have full control, including managing invites and assigning roles. Members have limited access.

5 Track Team Activity

a. Monitor your team's interactions and engagement metrics such as connection requests, meetings, and messages sent.
b. Use this data to understand team performance and adjust strategies accordingly.

6 Schedule Meetings

a. Team members can schedule meetings with event attendees directly through the web portal or mobile app.
b. Easily track scheduled meetings in the Meetings tab for seamless planning and coordination.

7 Analytics + Reports

a. Access performance analytics for your team, including metrics like the number of meetings, leads generated, and interaction history.
b. Use the Export feature to download reports for further analysis or internal reporting.

HOW TO EXPORT LEADS

1 **On a desktop computer visit the EDspaces Connect App Portal:**
https://pmazb.app.link/EDSpacesandCampusSafety25

2 **Log into your account using the email you used to register and the password you created for the EDspaces Connect app.**
- If your team hasn't already been claimed, you will see mid-screen some onboarding dialog boxes.
- Click next to go through the steps to Claim Your Team.

3 **You will have a My Team button in the upper right corner navigation.**

4 **Under My Team see Export on the far right.**
- Export to XLS or CSV.
(Tip: If excel export fails, try CSV format)

5 **Export includes all the exhibitor teams' scanning data.**

6 **If any scans are missing, click under Team Members.**
- Missing scans can be due to any team members pending acceptance to the team. Verify if there are any members who did not get accepted to the team.
- Once pending team members are accepted, regenerate the report and the missing data will populate.

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LEAD CAPTURE STEPS

Q | What is the in-app lead capture system?

A | The in-app lead capture system is a feature integrated directly into the EDspaces Connect event app, enabling exhibitors to capture, manage, and leverage leads efficiently using the camera on their personal mobile devices.

Q | How does the in-app lead capture system work?

A | Exhibitors can use their personal iOS or Android devices (must support iOS 16 or later or Android 9 or later) to scan attendee badges, capture contact information, take notes, score leads, and engage in real-time chat within the app. All captured data is aggregated in the Exhibitor Team Portal for easy review and management.

Q | Is there a limit to the number of users who can access the lead capture system?

A | No, all registered booth personnel (full conference and expo-only badge types) can utilize the lead capture features without incurring additional licensing costs when utilizing their own (or exhibitor provided) devices.

Q | Can exhibitors use their personal devices for lead capture?

A | Yes, the system is compatible with personal iOS and Android devices (must support iOS 16 or later or Android 9 or later), offering flexibility and eliminating the need for auxiliary devices. All users wishing to capture leads must download the EDspaces Connect event app from their respective app stores.

Q | What happens if there is no internet connection?

A | The lead capture system works offline. Exhibitors can scan badges and capture leads without an internet connection, and the data will automatically be available once the internet connection has been restored.

Q | How can exhibitors manage and export the leads they capture?

A | All leads captured by the team are aggregated in the Team Portal within the EDspaces Connect event app. From there, leads can be reviewed, organized, and exported with full profile details. Exhibitors can export the data to a .CSV file for seamless integration with their marketing automation or CRM tools.

Q | How long will exhibitors have access to their leads post event?

A | Exhibitors will have access to their leads for 30 days after the event. Please be sure to download leads prior to the 30-day deadline.

LEAD CAPTURE STEPS

Q | What are the key features of the in-app lead capture system?

A | Key features include:

- Badge Scanning:
  - Quickly scan attendee badges to instantly capture contact information.
- Note-Taking:
  - Add detailed notes about each interaction directly within the app.
- Lead Scoring:
  - Rate leads based on their potential value to easily prioritize follow-ups.
- In-App Chat:
  - Engage with attendees directly through real-time chat within the app.

Q | How does lead capture improve an exhibitor's ROI?

A | By efficiently capturing and managing leads, exhibitors ensure no potential opportunity is missed. The ability to quickly gather and organize contact information, coupled with powerful networking features, means more meaningful connections and better follow-ups, ultimately driving a higher return on their event investment.

Q | What additional benefits do in-app lead capture offer?

A | Additional benefits include:

- Unlimited Access:
  - All registered booth staff (full conference and expo-only badge types) can use the feature without additional licensing costs.
- Seamless Integration:
  - Built directly into the EDspaces Connect event app, eliminating the need for separate apps or devices.
- Enhanced Networking:
  - Real-time communication and personalized interactions help build stronger relationships.
- Centralized Management:
  - All booth staff leads will be aggregated in the Exhibitor Team Portal for easy review, organization, and export.