

## Basic Features

After exhibitors pay for the event license with the lead retrieval provider, they will be emailed their event code. They enter the code, check the event details and click confirm. They can start collecting and qualifying leads.

### Steps to Capture and Qualify Leads

- Open iLeads.
- Tap on your Event name.
- Tap New Lead.
- Enter Badge ID # or scan barcode if available.
- From here, it's easy to add notes and follow up actions.
- After entering your qualifiers, tap Done – your qualified lead is added to the leads list.



### Modifying an existing lead

- In leads list, tap the lead you would like to modify.
- Tap on Edit.
- Tap Done when you are finished.



### Tips to Remember:

- 1) A live Internet connection is NOT necessary during the show to use iLeads.
- 2) All leads are uploaded to LeadsLightning.com. Access leads using the User Name & Password found on the Info Tab on iLeads.
- 3) A 24-hour Tech Support Line is available during the show (914-375-7994)
- 4) If no name appears, that simply indicates a late registrant. Add qualifiers and notes as usual. Contact info will appear later when you sync your device.

## Easy to Use Advanced Features - Add custom qualifiers or follow-up actions

### Customizing Follow-ups

- Tap Events.
- Tap blue round button with a white arrow to the right of the Event name. 
- Scroll down, Tap on Follow-ups.
- To add a new Follow-up, tap Add a new question, tap Save.
- To edit a Follow-up, tap the question, edit, and tap Save.
- To delete a Follow-up, tap on the  red circle to the left and tap Delete.
- To move a question up or down, tap and hold the  three horizontal bars.
- When you are finished with your customization, tap Done.



### Adding or Deleting Survey Questions and Answers

- Tap blue round button to the right of the Event name. 
- Tap on Survey. Tap Add a new Question. Type the question and tap Save.
- Tap on Add a new Answer. Type the answer and tap Save.
- To delete an answer, tap on the  red circle to the left and tap Delete.
- To move an answer up or down, tap and hold the  three horizontal bars.
- When you are finished with your customization, tap Done.



### Modifying Standard Survey Questions and Answers

- Tap on the question text, make your changes and tap Save.
- To change the question type, tap on the current type, tap preferred type & tap Save.
- To add an answer, scroll down, tap Add a new answer, tap Save.
- To delete an answer, tap the  red circle to the left and tap Delete.
- When you are finished with your customization, tap Done.

