# **NC** expo+ conference

### **MOBILE APP & LEAD CAPTURE TOOL** QUICK START GUIDE

## **LEAD CAPTURE FEATURES & BENEFITS**

- Quickly scan attendee badges from the HD Expo + Conference mobile app\* to instantly capture contact information
- Multiple users at no added cost
- Lead scoring and notes (available once you have claimed your team)
- Scan offline. Scan anywhere. The leads will sync when you have internet connection again
- Export all of your team's leads

\*Mobile App/lead capture system requires an Apple device with iOS 16 or later, or an Android device with Android 9 or later.

#### STEP 1 DOWNLOAD THE HD EXPO MOBILE APP

Scan the QR code:



## STEP 2

Log in using the email address you registered with and the Badge ID found in your confirmation email or on your show badge.

Don't have your badge ID? Visit the Registration Help Desk on-site or check the confirmation email you received from no-reply@matchmaking.hdexpo.com

#### STEP 3 CLAIM TEAM

Claim your team in the mobile app for the ability to score leads, enter notes, and see all of your team's leads. Click "Claim Your Team" on the mobile app homepage and follow the instructions on the screen.

Note: The first staff member to log in and claim the team will become the team admin. The admin can change this or you can email: support@grip.events

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#### STEP 4 GET LEADS!

#### **Scan Attendee Badges**

- 1. On the mobile app homepage, click the red "Lead Capture Button", and allow the app permission to access your device's camera.
- 2. Point your camera at the QR code on the attendee's badge and the device will vibrate. You'll see a pop-up at the bottom of the screen.
- 3. Click the pop-up to open the attendee profile to rate the lead and add notes.

#### Be sure to click save after you rate your lead or enter notes.

Note: If you do not see prompts to rate a lead or add notes, follow Step 3 to claim your company Team. On iOS vs Android devices (e.g., on iOS, users have to click the lead details tab to add notes and ratings, while Android devices go directly to the screen to score leads and add notes.

#### **Badge Scanning FAQs**

After claiming your team, you can set up qualifying questions to ask attendees after you've scanned their badges. These can be set up under the "Settings" tab in the "MY TEAMS" portal. We recommend no more than 3-5 questions. These will appear on all of your team members' devices to ask and enter responses when they scan a badge and hit "Start Qualifying." These responses will appear alongside the lead data you receive when you export. Note: Qualifying questions are optional.

## **Q:** What information will be captured when I scan attendee badges or make a connection in the mobile app?

A: Once you scan an attendee badge or make a connection with an attendee in the mobile app, you'll be able to view the following details: Full Name, Company Name, Business Type, Firm Buying Power, Job Role, Buying Process Role, Overseas Importer, Product Categories of Interest, Company Website, Email, and Phone (when available).

#### Q: Why don't I see all the attendee information?

A: We collect as much attendee information as possible during the registration process. Please note that some versions of the registration form include fewer questions, which can result in varying levels of data between attendees. We recommend reviewing the info with the lead after you scan so you can add contact info in the notes if needed.

\*Only available if attendee provided at registration

#### STEP 5 EXPORT LEADS

1. Go to the mobile app web version from a laptop/desktop device:

#### hdconnect.hdexpo.com/hdexpoconference2025/event-login

- 2. Login using the same username/password for the Mobile App
- 3. Go to your team portal via the button in the top right corner that says "My Team"
- 4. Go to the "Export" tab on the far right and then click the "Export" button in the "Export Contacts and Badge Scans" box.

Note: Mailing addresses will not be displayed. Request this information by sending an export request email to mobileapp@emeraldx.com

Need help? Contact support at mobileapp@emeraldx.com