Getting Started for Exhibitors
Collecting and Editing Leads
Accessing Your Leads and Reports Online

Getting Started for Exhibitors

What is iLeads?

It's a cloud based trade show lead capture app that lets you digitally collect and manage information from all of your trade show sales interactions using your own smartphone or tablet. Lets you instantly distribute leads to your sales team. It's customizable and paper free, works offline and provides live reporting and digital backup of the list of leads you gather at a show. Speeds up lead distribution since everything is stored in the cloud - leads can be accessed online from anywhere in the world once they have been uploaded.

What if iLeads is not offered at my show? What if my show does not offer iLeads, will it still work?

Currently, iLeads will only work if we are selected as the official lead retrieval vendor. We need to receive the attendee database--and if we are not the official vendor, they will not release this information.

If iLeads is not being offered at your show. We recommend that you contact your show event organizer to request they include iLeads as an option on their lead retrieval order forms

How do I get my access code and my username and password to get leads online? I lost my username and password?

If you paid for your iLeads license, the username and password will be emailed to you. First, please check your spam folder; the email will be from info@leadslightning.com If you still can't locate it, call us at (800) 899-2278. We will make sure you get what you need.

How does iLeads work?

Prior to the event the exhibitor pays a license fee to receive a unique access code, which allows them to gain access to their leads online. As soon as exhibitors pay for the event license, they enter the event code, check the event details and tap confirm. They can start collecting and qualifying leads.

Exhibitors enter a registration ID or scan a barcode on a trade show attendee's badge to digitally capture their info in real time. From here, it's easy to add notes, action items and answer survey questions. They tap done and the badge number and attendee name are added to the exhibitors list of qualified leads.

Is iLeads compatible with iPhone®, iPad®, iPod touch® touch and Android™ devices too?

Yes! iLeads is a native app built specifically for Android and Apple. It also works on the Kindle Fire and Kindle HD. You can use iLeads on an iPhone®, iPod touch®, iPad® (Version 7.0 or higher), or Android® phone (Operating System 4.2.x or higher). We do offer exhibitors the option to rent an iPad® or an iPod touch® at shows.

Does iLeads work on Android phones?

Yes, it works on Android™ phones and tablets (Operating System 4.2.x or higher) that have access to Google Play.

Do exhibitors like using iLeads?

Exhibitors say that the award winning iLeads is "easier." They appreciate how iLeads "gives better data about leads" and how "you can access those leads right away online." With this kind of user response, we know we're delivering a great product to people who really need it.

What about people that don't own smart phones?

We do offer exhibitors the option to rent an iPad® or an iPod touch® at shows.

How do you set up multiple iPods®, iPads® or Android™ devices to store leads in same LeadsLightning℠ account? How can we go about getting a common user name and password for our multiple devices?

When an exhibitor orders multiple licenses a master account is created and then each license is tied to that master account as required. Each individual account will have its own login info, using the master account will allow someone to view all leads. The event access code is the same for all licenses purchased.

Collecting and Editing Leads

How do I setup iLeads for my booth?

First download the free iLeads app onto your device from Apple’s App Store or Google Play. Once an event code is obtained from your lead retrieval provider, enter the event code, check the event details and tap confirm. Do this as soon as you receive the event code.

When do I receive the event code?

The event code is sent via email once we have the registration database from show management. This is typically four to five days prior to the start of the event.

When can I create custom qualifiers and or survey questions?

You can add your custom qualifiers and survey questions/answers once you have received your access code and setup the event on your device. Exhibitors can customize qualifiers right on the device or customize them using the iLeads website, LeadsLightning.com. iLeads allows you to add these items at any time—even while on the show floor.

Can I customize my qualifiers and survey question online?

Yes, first login to LeadsLightning.com and click the “Customize” menu at the top of the page. There, you will be able to customize qualifiers and push the qualifiers to your device. Exhibitors who have purchased multiple licenses can also login online, customize qualifiers and push the unified qualifiers to all the devices at the booth. The updates you make online will go live to iLeads on your device after you press the button that says “Refresh Follow-Ups and Survey”.

How do I customize qualifiers and surveys on the phone?

Press the “Events” button on the upper left of the screen. Find your event name and tap on the blue arrow next to the event name. Scroll down and you’re presented with options to add and edit Follow up actions and Survey questions for this event.

- To add a new Follow-up, tap on Add a new question. Type your question and tap Save.
- To edit a Follow-up, tap on the question, edit it 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 to the right of the question and move it up or down.
- To edit Survey Questions and Answers 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.
- To Modify 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.

How do I collect a lead?

Collecting leads is easy. Tap “new lead”. Enter a badge ID or scan the barcode, if available, on an attendee’s badge. From here, it is easy to add qualifiers, survey responses and notes. Tap done to add the information to your lead database. Tip: iLeads let’s you add custom qualifiers and follow-up actions on the fly. From here - it’s easy to add notes, action items and answer survey questions. Tap done and the badge number and attendee name are added to your list of qualified leads.

Why are there registration IDs on the badges and a barcode?

A registration ID should be printed, as well as a barcode. If for some reason a badge does not scan readily, or an exhibitor does not own a device with a compatible camera, the exhibitor can quickly and easily type the registration ID into their device.

Sometimes exhibitors and/or attendees are uncomfortable when personal space is invaded, as when holding a badge scanning device in close proximity to the badge wearer's body. If a smartphone or scanner is held too far from or too close to a badge, the scan may fail. If lighting is insufficient or if there is glare off of a badge holder, again, there may be failure to scan properly. For all of these reasons, having registration IDs printed on the badge is a reliable fallback position.

Surprisingly, we find a great many exhibitors prefer to enter an ID, rather than having to scan a barcode. Having both options makes everyone happy.

How do I edit or delete a lead?

Tap on the lead, and then tap on edit. From here, you can edit your note; follow up actions or the survey. When you have finished making your changes, simply tap done to save your changes. To delete a lead, scroll down to find the delete option.

Can I view stats on the leads on my device?

Yes, to manage an event, tap on the blue arrow next to the event name. From here, you can view important statistics.

Do I need to be connected to the web to collect leads?

A live internet connection is not necessary during the show to use iLeads. If an Internet connection is unavailable, all collected data will be updated automatically when the device is running iLeads and a Wi-Fi or cellular connection becomes available. The only time a live internet connection is necessary is when you are downloading the app to your device, when you are setting up your device with the access code for the event you are attending and when you want to upload your leads.

How do I know if all of my leads have been uploaded?

Press the "Events" button on the upper left of the screen. Find your event name and tap on the blue arrow next to the event name. To ensure that all your leads have successfully been uploaded to LeadsLightning^{SM}, "the number of leads collected so far" must always match "the number of leads sent successfully." If the number of leads collected so far" is greater than "the number of leads sent successfully", your device may not have had a working Internet connection. As soon as your device establishes a working Internet connection, iLeads will automatically upload the remaining leads to LeadsLightning^{SM}.

What about people that register on site?

At times after entering a new lead, you may notice that prospect's information is missing. This occurs if that particular attendee registered onsite. However, there's no need to worry. As soon as the event lead retrieval provider uploads the onsite registration data, iLeads will automatically populate the missing information. You may add qualifiers and notes as usual even if no information appears. Contact info will appear later when the data is available and your leads are uploaded to LeadsLightning^{SM}.

How do I check if the event has Wi-Fi?

To successfully upload your leads to the LeadsLighting^{SM} online portal, you must establish an Internet connection, Wi-Fi or cellular. This can be done before, during or after a show. In order to connect to Wi-Fi during the show, you may need to check with show management to see if Wi-Fi is available at your event. Here's how you check for Wi-Fi if you are using an Apple product:

1) To check for Wi-Fi availability, press the home button on your iPhone®, iPod touch®, or iPad®
2) Tap on the settings icon
3) Tap Wi-Fi
4) Make sure the Wi-Fi is "ON", if not, use the slide bar to turn on the Wi-Fi
5) Choose an available network from the list and enter the network key to connect
6) Once connected, press the home button and tap the iLeads icon.

Your leads will now be uploaded to the online portal automatically.

I see my leads on LeadsLightning^{SM} but cannot see my custom questions/answers. Where are they?

You need to click on preferences and select all of the items you need to see. For most exhibitors, all you need to check will be Follow-ups and Surveys. Then, click on reports and select LEAD DETAIL. This report will give you all of the information you collected on your leads

How do we receive the leads after the show?

At the show, leads are uploaded to Bartizan's secure web portal, LeadsLightning℠, for tracking activity. You can download and sort leads from this site. A live Internet connection via Wi-Fi or cellular is necessary for real-time access. If no Internet access is available on the show floor, the app will store your leads until the device does get an Internet connection. Once connected, you need to tap on the iLeads icon and your leads will be uploaded automatically.

Is the data transferred in real time?

Yes, if your device is connected to a live Internet connection via Wi-Fi or cellular. If no Internet access is available on the show floor, the app will store your leads until the device does get an Internet connection. Once connected, you need to tap on the iLeads icon and your leads will be uploaded automatically.

We have three sales reps. How is it tracked which person scanned the lead? Is it based on their phone? Or are there presets that we set up to assign name?

Each of your sales reps would be provided with the same license code to setup iLeads on their devices. Once set up, each sales rep is provided with their own account to the LeadsLightning℠ portal to see their leads only. A master account is also setup to monitor the entire company's activity in one place. You'll be able to access your complete event history and statistics and view a database of all company leads collected at various events with powerful lead analysis and reporting.

Will we only be able to use it on one device? Ex. We will have 4/5 reps, can they each have their iPad® / iPhone® and collect leads or can we only use it on one device with our purchase?

For multiple devices, you will also need to purchase multiple licenses, but the fees for both primary and additional licenses are typically much lower than standard lead retrieval equipment.

What if no name appears on the screen after I capture the lead?

If no name appears, that simply indicates a late registrant. Add qualifiers and notes as usual. Contact info will appear later automatically when the data becomes available.

Accessing Your Leads and Reports Online

Where can I find my leads?

Leads are uploaded to a Bartizan's secure web portal, LeadsLightning℠, for tracking activity. Your event license includes access to the LeadsLightning℠ portal. You can access and manage your leads from anywhere. It's your searchable database and email marketing software in one. Using LeadsLightning℠, you can track the attendees who stopped by booth. You can view, sort, print and download leads. With this software it's easy to identify your best leads by filtering leads and sending only the best leads to sales. Bartizan is committed to making your exhibiting experience a success. With iLeads you can follow up quicker and get a leg up on the competition.

Where does the lead data go?

All leads are immediately uploaded to Bartizan's secure web portal, LeadsLightning^{SM}, for tracking booth activity during the event. Included in the exhibitor's event license is access to the LeadsLightning^{SM} portal. This software makes post show follow up easy. It's a searchable database and email marketing software in one. Exhibitors can filter contacts in a wide variety of ways, even view results in graphical form. Complete historical data is available to show management to help prove the ROI of events to prospects.

How do I know if all of my leads have been uploaded?

Press the "Events" button on the upper left of the screen. Find your event name and tap on the blue arrow next to the event name. To insure that all of your leads have successfully been uploaded to LeadsLightning^{SM}, "the number of leads collected so far" must always match "the number of leads sent successfully." If "the number of leads collected so far" is greater than "the number of leads sent successfully", your device may not have had a working Internet connection. As soon as your device establishes a working Internet connection, iLeads will automatically upload the remaining leads to LeadsLightning^{SM}.

Where can I see my lead counts?

You can see how many leads you have collected by performing the following steps:

1. Tap on Event in the upper right corner of the screen.
2. Tap the Arrow to the right of the event name.

Within the Show Statistics area, you will see # of leads collected—this is the total count of leads captured. You will also see # of leads sent successfully—this is the total number of leads sent to your LeadsLightning^{SM} account. The list of # of leads pending contains the number of leads that have not been uploaded to LeadsLightning.com due to either a slow connection or no connection at all. These leads will be sent once a connection is established. The # of leads to be updated is the number of leads that were changed after being sent to LeadsLightning^{SM} previously.

In addition, a quick view of the # of leads collected is on the top of the event leads list.

How do I retrieve login credentials for my organization's LeadsLightning account?

On your device, tap "Info". Use the username and password provided on this screen to access your online account. Or, if you have ordered more than one license, use the user name and password you received via email along with your access code to login - this lets you to view leads collected by all devices.

What is LeadsLightning^{SM}?

LeadsLightning is Bartizan's secure web portal that contains all lead information you gathered at your event. **LeadsLightning is free, cloud-based software that allows you to retrieve data anytime, anywhere.** If you need your user name and password to login to your account, please contact us at 914-375-7994.

Here's how LeadsLighting^{SM} benefits show participants:

Exhibitors: Track the attendees who stopped by booth. View, sort, print and download leads. Identify best leads by filtering leads and sending only the best leads to sales.

Attendees: Attendees can follow up on exhibitors by email. A feature in iLeads called **My Tradeshow Connections**© lets attendees view and download the company information of exhibitors they visited.

How does LeadsLightning^SM work?

The LeadsLightning^SM portal is used for simple and fast data download, tracking, management and reporting. Once logged in, click on “Download Leads” to download your data. You can use this file to later import the data in to your own lead management system or CRM. Highly useful reports can be generated when using the LeadsLightning portal. By default you’re always presented with the “Leads Details” page when you first log in. However, when you log in for the first time, you are presented with a video on how to use LeadsLightning^SM. On this page, you can view all the information related to a lead.

- Scroll horizontally to view all of the available information.
- Click on any of the column titles to sort the data in ascending order.
- Click it again to sort the data in a descending order.
- Click on the “follow up counts” link and you’re presented with an intuitive report based on the Follow up actions entered during the event.

Survey Question Counts is also another very useful report that is generated based on the survey questions answered during the event.

Does LeadsLightning^SM allow downloads in Excel format?

Yes, you can export your information into Excel and other popular file type: PDF, Word, PowerPoint and TDF.

I am totally lost, what can I do for help?

A 24-hour Tech Support Line is available during the show. That number is 914-375-7994. We also have a Help Center on our website with informative articles related to iLeads.