

# Lead Capture

How to use lead capture?

swapcard

All-In-One Event & Community Platform

Grow your Events into a Community



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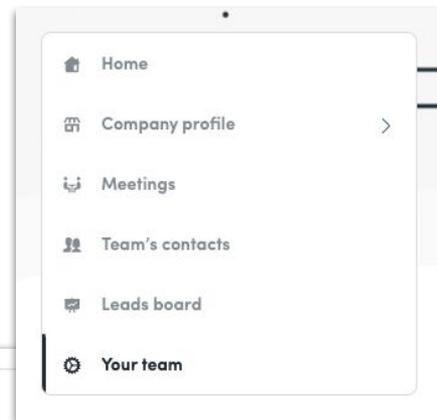
# Before lead scanning

Before scanning, **make sure you are a team member of an exhibitor booth**. If you are not, your leads will not land in the team's contact list. Your colleagues who are already team members can add you as a member from **"Your team"** in the **Exhibitor Center** (team.swapcard.com).

**Note:** If this option is not there, **contact the event organizer**.

Make sure that **contact sharing is on**. Go to **"Your team"** and click to share your contacts with the team.

**Only the person currently logged in can toggle this on/off.**



## Add your colleagues

Invite your team members who are registered for the event so you can all access the same interface. With your whole team in one place, it's easy to share contacts and data!

ADD A MEMBER

## Member settings

Show profile

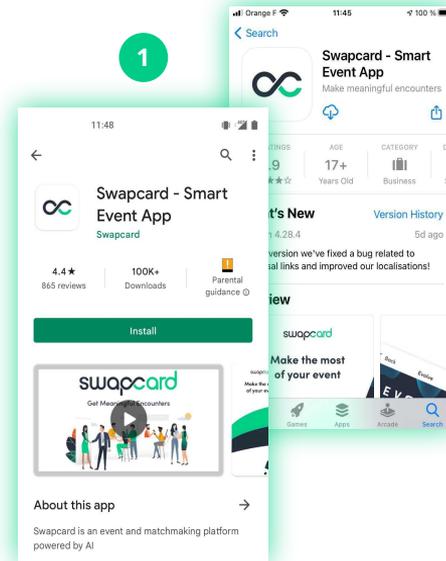
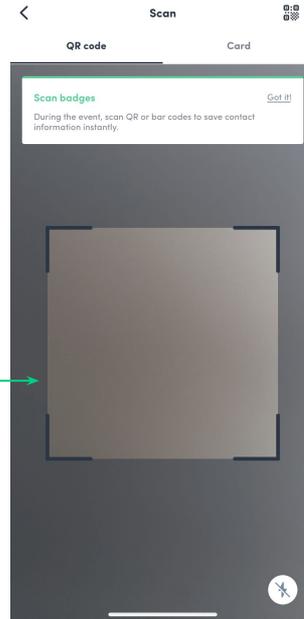
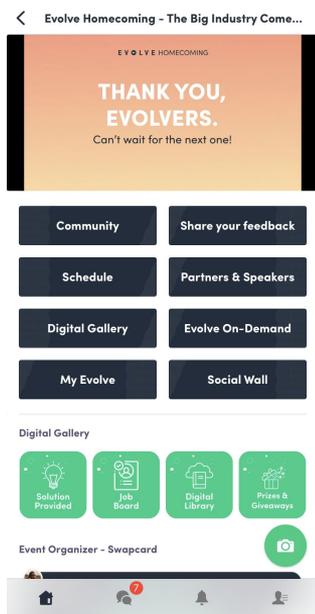


Share his/her contacts with the team



# How to lead scan?

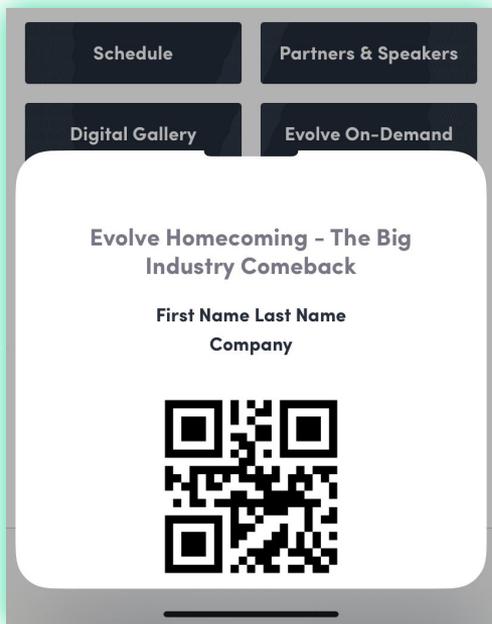
- 1 Download the Swapcard app for **iOS** or **Android**  
**Note:** the organizer may have their own app you can use instead, usually searchable by event name. If you are unsure about which app to use, contact the event organizer.



- 2 Login and click the **camera icon on the bottom right**. This opens up a QR code/barcode **scanner**.

# What to lead scan?

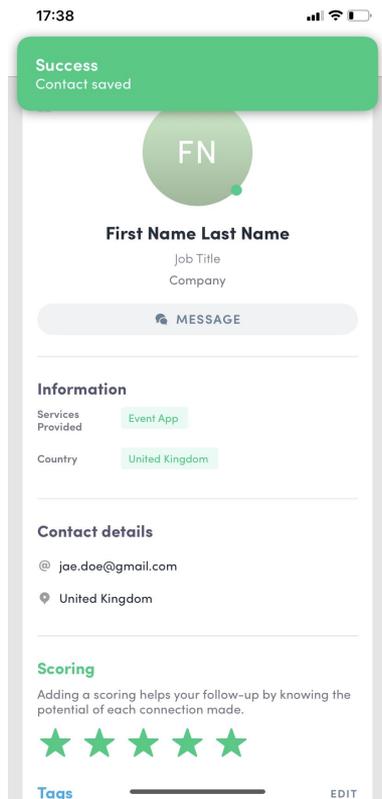
There are generally two options, depending on what the organizer decides to do:



- 1 Scan the QR code or barcode on a printed badge
- 2 Scan the QR code or barcode from the Swapcard or Event app:

**Note:** Organizers often add a button on the event homepage that attendees can use to open their QR code or barcodes for scanning. This is usually called “**Event Ticket**,” “**My Badge**,” “**QR code**,” or similar.

# Options after scanning



1

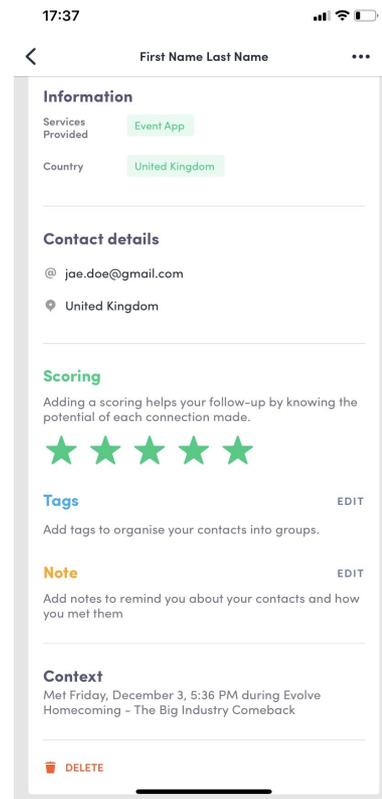
A pop-up will tell you if the scan was successful.

2

Scanning will automatically create a connection between you and the person you scan. They will then land in your own contact list as well as the team's contact list.

3

You can then add details about this lead. You have the option to **score**, **tag**, **add a note**, and **delete** the contact, as well as view the **context of the connection**.



# How to export the leads

To export the leads go to the **Exhibitor Center** (team.swapcard.com) and to **Leads board**. Click **EXPORT LEADS** on the top right.

- Home
- Company profile >
- Meetings
- Leads board**
- Your team

## Analytics of your company

NUMBER OF VIEWS OF YOUR COMPANY PROFILE	242	NUMBER OF PEOPLE WHO BOOKMARKED YOUR COMPANY	2
NUMBER OF CONTACTS MADE	25	NUMBER OF CONFIRMED MEETINGS	1
NUMBER OF CONTACTS WITH SCORING	5	AVERAGE OF SCORINGS MADE BY YOUR MEMBERS	4.8

## Export leads report

Download a list of people your team interacted with during the event as an Excel file

**EXPORT LEADS**

## Team's contacts

Q Search



**Thank you for taking the  
time to read this presentation.**

If needed, you can fill out this **quick form**  
and our **support team** will get in touch:

<https://help-attendees.swapcard.com>

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