

## Exhibitor Guide and FAQs

### Guidelines

Using the Exhibitor Portal for LeadCapture

#### Instructions LeadCapture OnArrival

As an Exhibitor Admin, you'll play an integral part in your organization's lead gathering. You'll need to register your organization and booth staff and provide them with LeadCapture licenses. Booth Staff are the members of your team that will be on the front lines, representing your organization at the event and scanning potential leads. The instructions below will show you how to access the Exhibitor Portal, add your dream team, and export the leads they collect.

**1 Access the Exhibitor Portal.** If you have already pre-purchased licenses, locate the LeadCapture invitation in your inbox, and click **Get Started**. Create a password and click **Log In**. [Then skip to step 3](#).

Please find below the screenshots



ITEXPO TECHSUPERSHOW 2023

Log in to manage your organization's account for the events you're attending.

Email

Password

[Forgot?](#)

Log in

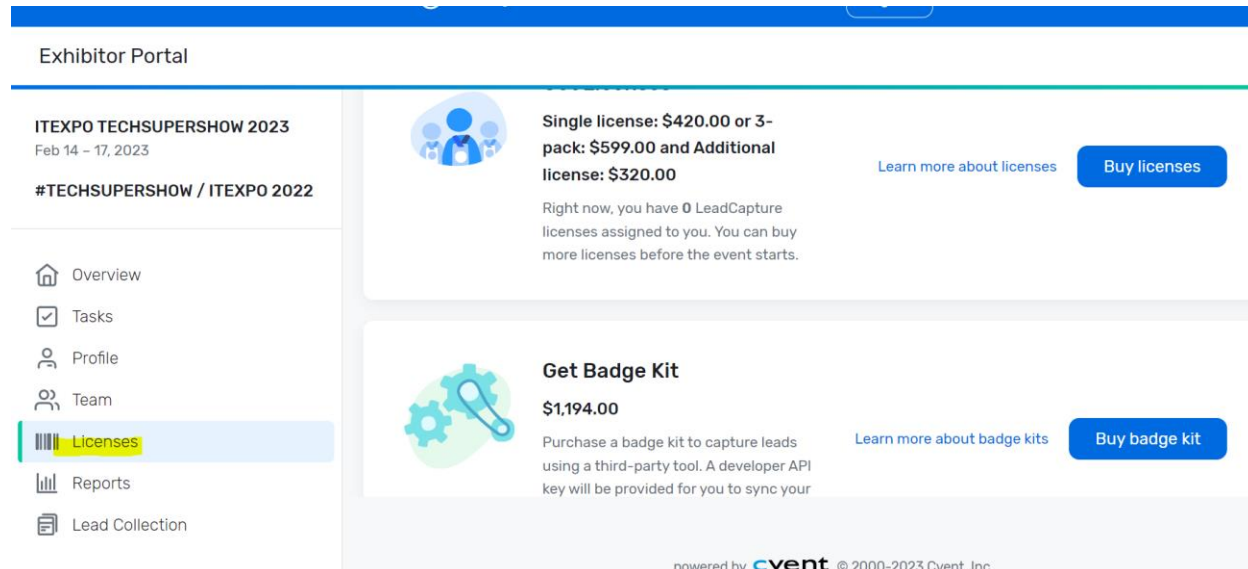
**2 Purchase your licenses, if necessary.** From the Welcome Page, click **Buy licenses**, then **Purchase licenses**. Next, select your desired license type. *App Licenses* require your booth staff to download the LeadCapture app on their own device in order to scan leads. *Device Rental Licenses* include the scanning devices, which we

ship to the site, ready to go.

Check the box to the right of Single to purchase one LeadCapture license, or click the plus sign (+) to increase the quantity of how many devices you want to purchase.

Once you've made your selections, click **Go to checkout** to complete the transaction.

Please find the Screenshot Below



**3 Add badge kit access, if necessary.** If you are working with a third party lead solution, you can purchase access to the API to integrate [the badge kit](#).

To do so, from the left-hand navigation, click **Licenses**. In the Get Badge Kit section, click **Buy badge kit**. Add the badge kit access to your cart by clicking the plus sign (+) then click **Continue to checkout** to complete your transaction.

Once you've completed your purchase, from the left hand navigation, click **Licenses**. The Licenses tab opens by default. Click the **Badge Kit** tab to access the API information.

**NOTE:** [Follow these instructions](#) to build your integration.

**4 Add your staff.** From your event's home page, click **Find onsite staff**.

# Welcome to Future Technologies Conference

📅 November 21, 2022 at 7:30 AM - April 2, 2023 at 12:30 PM

## Tasks

The dashboard displays five task cards:

- Exhibitor Tasks**: Icon of a checkmark. Text: "You have **3** tasks to complete". Button: "View tasks".
- Get Licenses**: Icon of a document with a pencil. Text: "Right now, you have **7** LeadCapture licenses assigned to you. You can buy more licenses before the event starts." Button: "Buy licenses".
- Assign Licenses**: Icon of a document with a pencil. Text: "You have **0** licenses available to assign. Assign licenses to get your onsite staff ready to go." Button: "Assign licenses".
- Lead Qualification Questions**: Icon of a checklist. Text: "Qualify your leads with questions. Find out more about attendees than just a lead score." Button: "View questions".
- Onsite Staff**: Icon of a person with a plus sign. Text: "Right now, you have **0** onsite staff. Finish creating your team." Button: "Find onsite staff".


In order to add someone as onsite staff, they need to be [registered for the event as an attendee](#). Search for your team by confirmation number, ticket ID, or email and check the box next to their names.

Search Booth Staff



### Look Up and Import Registered Team Members

Brenda@email.com Search

 Brenda Black	brenda@email.com	Confirmation HTNC4P4CHZV
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Import selected

Repeat as necessary. When you're done, click **Import selected**.

**5 Assign licenses.** Your staff won't have access to scan leads in the LeadCapture app until you assign them a license. To do so, click **Licenses** from the left-hand navigation. All of your license codes will be listed.

**NOTE:** *App Licenses* require your onsite staff to download the LeadCapture app on their own device in order to scan leads. The *Device Rental Licenses* include the scanning devices, which we ship to the event, ready to go.

Click **Options** next to one of your unassigned license codes, then **Assign License**. Click the circle next to the person you want to assign the license to, then **Assign**.

Assign LeadCapture License ×

Assign License n-l9r1sex  
to:

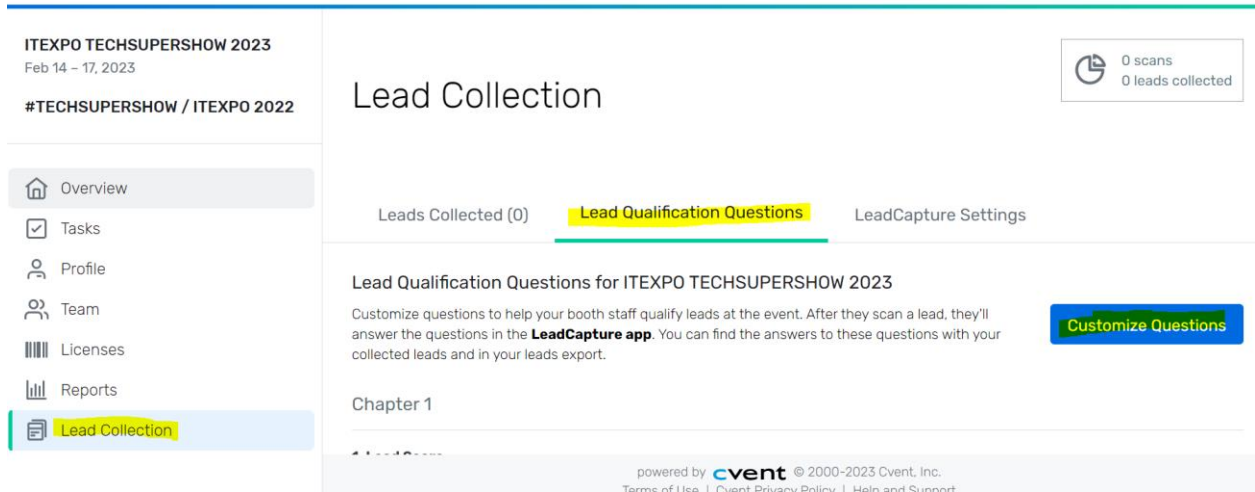
- Kaitlyn Artt**  
 kartt@event.com
- Tara Di Napoli**  
 dinapoli@event.com

Cancel Assign license

They'll automatically receive an email with their access code to log in to the LeadCapture app.

**6 Create questions for your onsite staff to answer while collecting leads.** From the left-hand navigation, click **Lead Collection**. The Leads Collected tab opens by default. Click the neighboring tab, **Lead Qualification Questions**. Then [build out your questions](#).

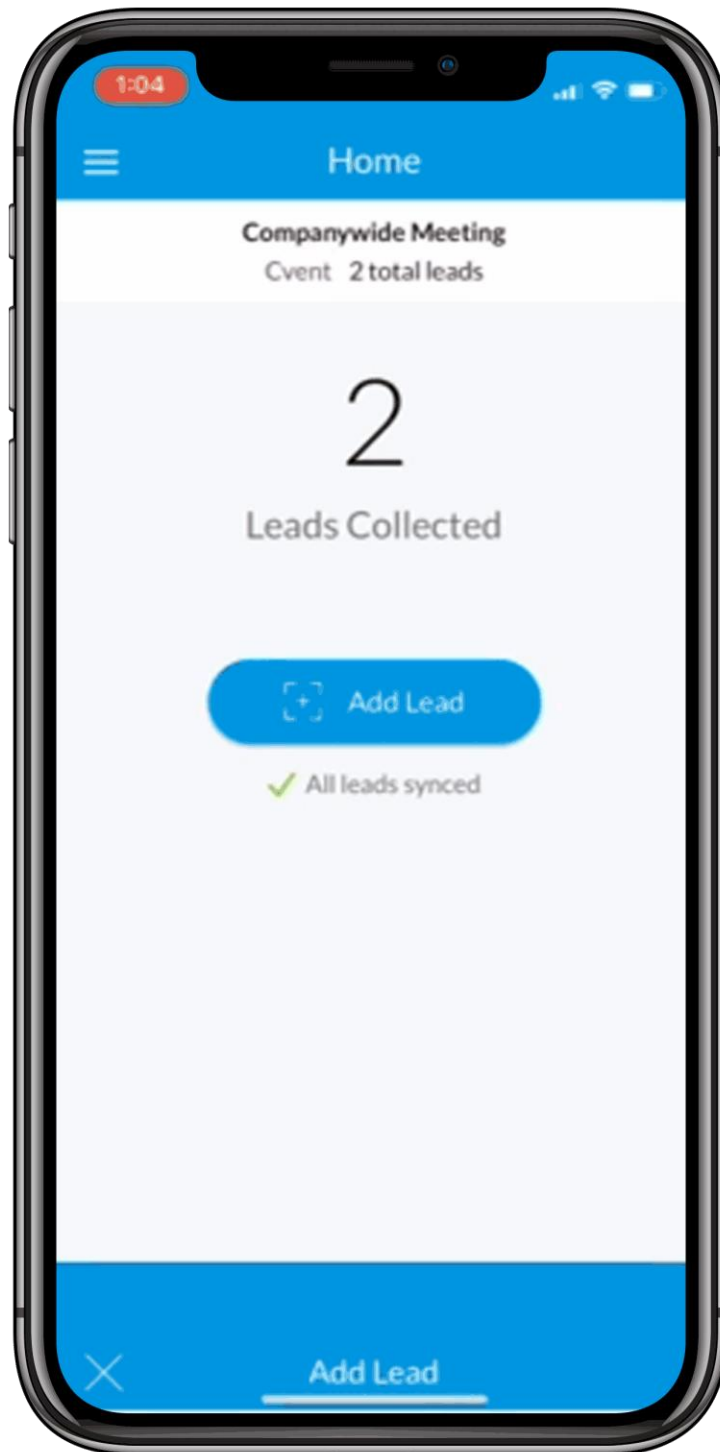
Please find below the screenshot  
Exhibitor Portal



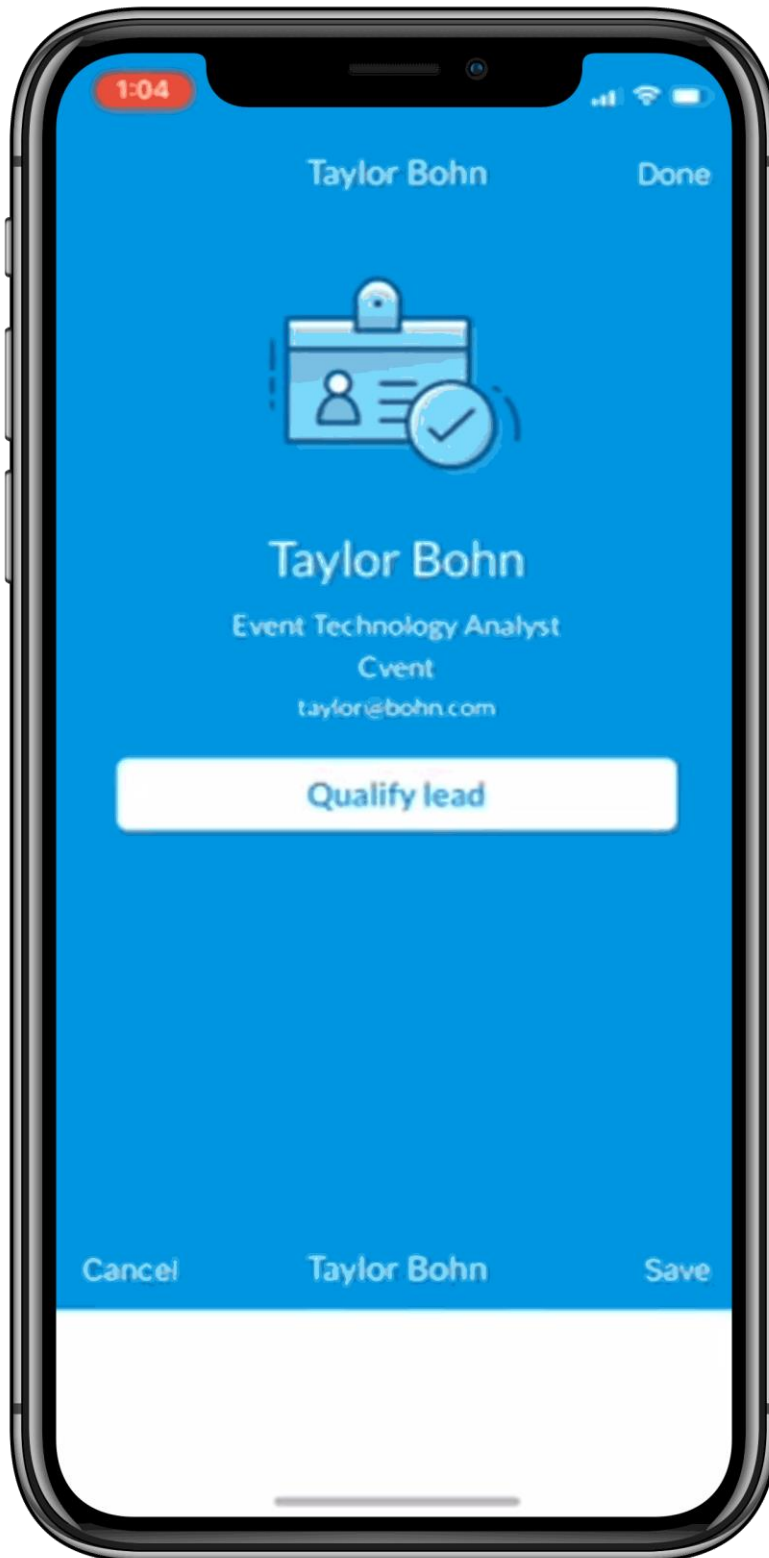
**7 Capture leads.** To [scan leads](#), instruct your onsite staff to download the Cvent LeadCapture app from the [Apple App Store](#) or [Google Play Store](#).

Have them open the app, then enter their access code and tap **Next**, then **Yes, Activate Device**.

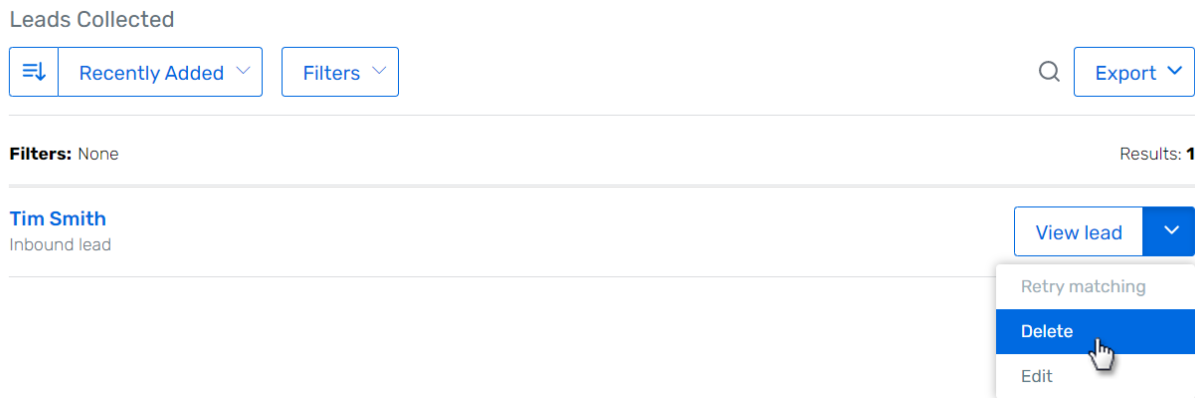
Tap **Add Lead** and scan the lead's QR code.



If necessary, tap **Qualify Lead**. Enter any qualifying questions, then tap **Save**.



**10 Delete a lead, if necessary.** If you accidentally scanned a lead that you no longer want to appear in reports, you can delete the lead in the Exhibitor Portal. From the left-hand navigation, click **Lead Collection**. Click the arrow to the right of the lead you want to delete, click **Delete**, then click **Delete lead**.



**11 Export your leads.** Once the event is over, [follow these steps](#) to export your leads to an Excel file.

## Scanning LeadCapture Leads

### Instructions Trade Show Solutions LeadCapture

The LeadCapture app allows you to quickly scan leads while exhibiting at an event. Collect the lead's contact information, answer qualifying questions, and export this data after the event.

**1 Download the LeadCapture app on your device.** Download the Cvent LeadCapture app from the [Apple App Store](#) or [Google Play Store](#). If you rented a scanner, the app is already installed and ready for pickup onsite. Contact your event planner for the onsite LeadCapture pickup location.

**2 Enter Your Access Code.** Enter the access code from your email. (If you never received one, tap **I don't have an access code** or ask your Exhibitor Admin to look it up).

Tap **Next**.

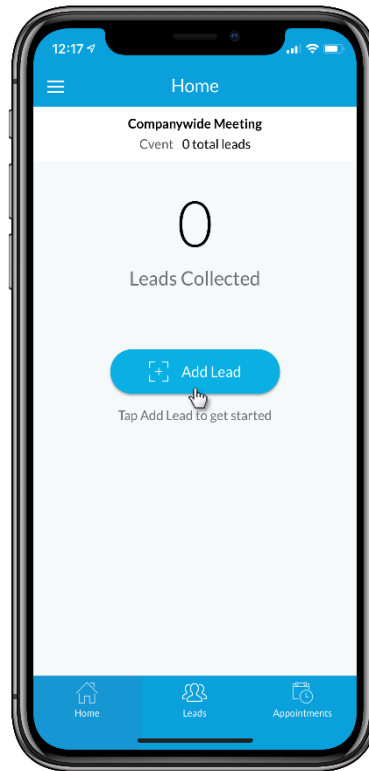
**NOTE:** If your Admin hasn't assigned you a license yet, you'll be prompted to allow the app to access your camera. Tap **OK**, then scan your badge or tap **Manually Enter** to enter your confirmation number

Tap **Yes, Activate Device** to confirm.





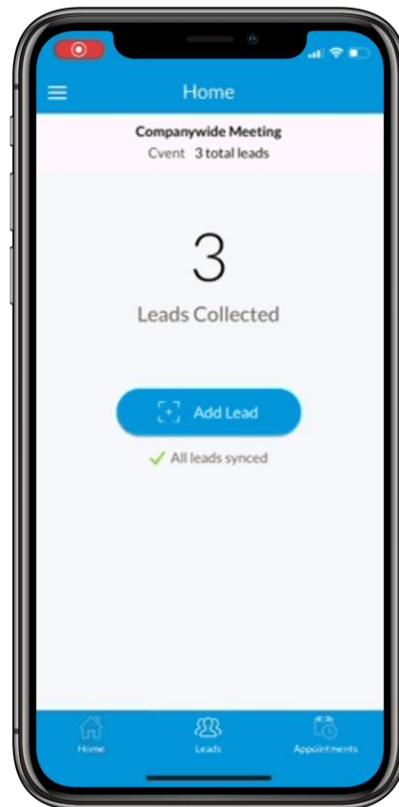
**3 Add a lead with your device scanner.** Tap **Add Lead** in the center of the screen. If prompted, tap **OK** to allow the app to access your camera or the attached scanner.



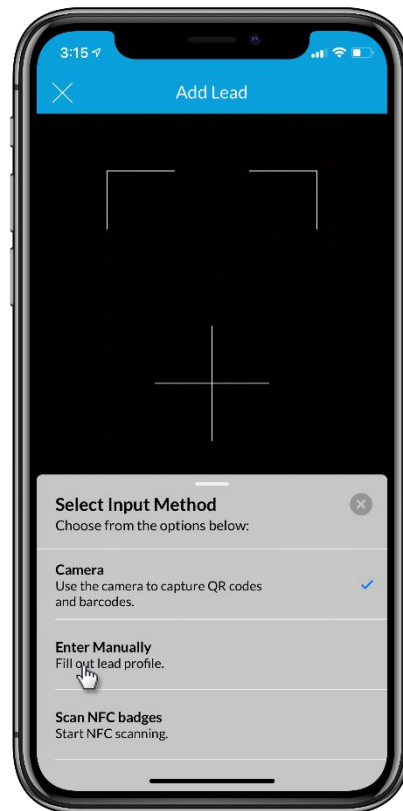
To scan a lead with:

- Your own device, center the code on the screen.
- A rental scanner, aim it at the QR code and press the button on the side.

Then tap **Done**.

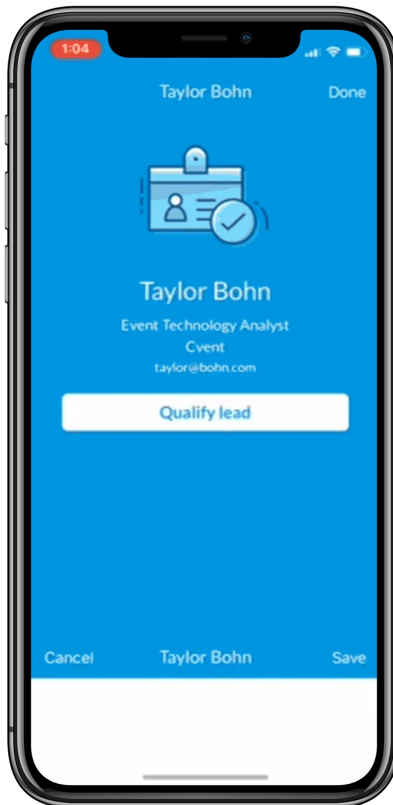


**Or, add a lead manually.** If the lead isn't wearing a badge, add their information by tapping **Add Lead**. Then tap **Camera** at the bottom of the device to open more input method options. Tap **Enter Manually**.



Enter the lead's information, then tap **Save**.

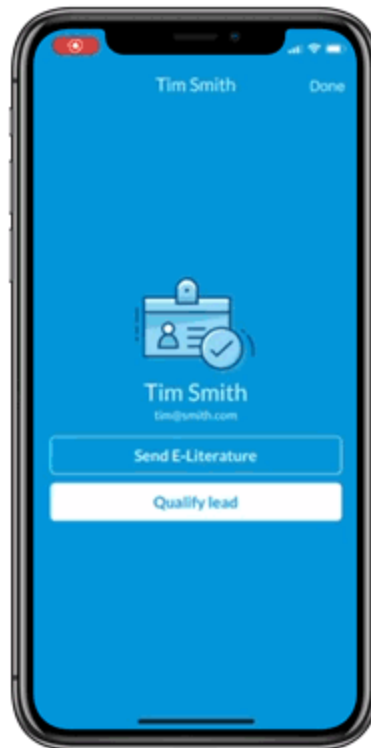
**4 Qualify the lead, if necessary.** Tap **Qualify Lead** to answer additional questions or add notes.



When finished, tap **Save**.

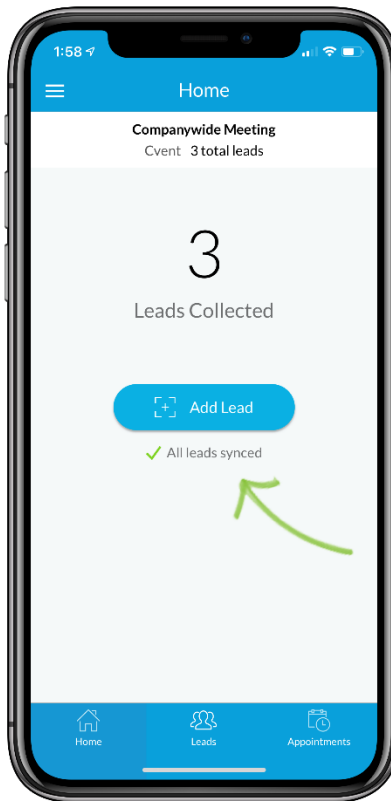
**NOTE:** To view or edit a lead's info, tap **Leads** at the bottom of the app's home screen. You won't be able to see leads your coworkers have collected.

**5 Send e-Literature, if applicable.** If you're [using e-Literature with Universal LeadCapture](#), select which files and links to send to the lead. Tap **Send E-Literature** and check the boxes next to the files and links you want to send. Tap **Send** in the top-right, then **Done**. You can send up to 25 files and links at once.



The lead will receive an email to access the files and links.

**6 Sync Your Leads.** After the event, ensure you connect the device to Wi-Fi to sync all of the leads to the server. If leads are not synced, your exhibitor admin will not be able to export the leads you collected. Verify that the leads have synced by checking the home screen.



**7 Export your leads.** Once your leads are synced, [follow these instructions](#) to export them.

## FAQs

### **1. How can I Access Leads?**

Only Exhibitor Admins have access to export leads. If you were part of the booth staff onsite or virtually, contact your Exhibitor Admin and provide them with these steps to export your leads. Due to attendee privacy and security reasons, we're unable to export and send leads. [Exporting Your Leads Post Event](#)

- Link to log into exhibitor portal (enter event code in the url before distributing to exhibitor admin)
- <https://onsite.cvent.com/exhibitor/#/login/eventcode>

**2. Can we add other admins to the portal? When an admin is providing consent over email.**

Yes – required written request/approval from planner.

**3. Can we change the exhibitor's name/email address?**

Simple spelling errors – yes

Exhibitor Admin can do this

If not, written consent from planner.

**4. Could you help me with the Event code?**

If the administrator is emailing then yes, if it's an unknown email address then we would have to confirm with the client.

**5. Where to purchase a license?**

The exhibitor admin can login to the Exhibitor Portal > Select Purchases License.

Resource: [Using the Exhibitor Portal](#)

- Link to log into exhibitor portal (enter event code in the url before distributing to exhibitor admin)  
<https://onsite.cvent.com/exhibitor/#/login/eventcode>

**6. I don't see any available licenses. Why is that?**

Licenses may not be available for purchase. Please reach out to the meeting planner.



## **7. How to export leads?**

Leads can be accessed 2 ways:

### **Speaking with exhibitor:**

Only Exhibitor Admins have access to export leads. If you were part of the booth staff onsite or virtually, contact your Exhibitor Admin and provide them with these steps to export your leads. Due to attendee privacy and security reasons, we're unable to export and send leads.

#### Exporting Your Leads Post Event

- Link to log into exhibitor portal (enter event code in the url before distributing to exhibitor admin)
- <https://onsite.cvent.com/exhibitor/#/login/eventcode>

## **8. How to assign a license?**

Admin needs to assign booth staff (must be a registered attendee), then the license can be assigned

Step 4 of Using the Exhibitor Portal

## **9. I'm not able to find my booth staff, why?**

The attendee must be registered for the event in order to be added as Booth Staff. Once registered, you can search for them by confirmation number, ticket reference ID, or email address.

## **10. Can the same license be used by two different booth staff/on different devices?**

Once a license has been consumed, it can't be used on a different device.

The same license cannot be used simultaneously on two devices

### **11. Why am I not able to edit exhibitor profiles/content?**

Profile edits may not have been enabled by the planner. Please reach out to the meeting planner.

### **12. A team member registered through one of the assigned reg types, but we want to cancel that and register someone else instead.**

Reach out to the PM to receive consent from the planner to substitute.

### **13. How can I set up custom questions for lead surveys?**

[Adding Custom Questions in the Exhibitor Portal](#)

### **14. I'm not seeing the correct event when I login to the exhibitor portal, why?**

You may have utilized LeadCapture for a previous event. To add the correct event, from exhibitor portal > Switch Event > Join Event > Enter Event Code > Select Add Event

This is the signup url for ITEXPO TECHSUPERSHOW 2023- [Exhibitor Portal \(cvent.com\)](#)

***I have different sub-companies, how can I purchase all the licenses under one portal and differentiate between the leads collected by different companies? OR how can I rename the license to my company name?***

#### **Steps for Support:**

You must then communicate that the booth staff must select their company as the device name when logging into the app. Log-in > Set Device Name > Select the Correct Company > Scan Leads

### 15. What is the difference between 3-Pack LeadCapture License and Single LeadCapture License?

In 3 Pack LeadCapture License, you get 3 Licenses for \$599 and any additional Purchase will be cost - \$320/ APP license.

If you go with Single LeadCapture License, you get a single license for \$420 (First purchase) and additional licenses will cost you \$320/APP License

### 16. I do not recall the password to Admin Portal

Go to the login link - > Click on forgot password> Enter your email address> click on the reset link which you have received in your inbox> Reset your password

Please find below the screenshots

1.



Log in to manage your organization's account for the events you're attending.

Email

Password

[Forgot?](#)

Log in

[Add your company](#)



ENTER YOUR EMAIL

We'll email you instructions on how to reset your password.

Email

Reset password

Cancel

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3.

Reset your OnSite Solutions password



OnSite Solutions Notifications <planners-noreply@cvent.c  
To ● Andrews, Anto



Retention Policy Delete After 2 Years (2 years)

Expires 11-01-2025

**i** If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some message.

Hi Anto,

Forgot your password? No worries, we have a new one for you.

[Reset Your Password](#)

Didn't request this? Just ignore this email. Your password will be fine.

Thank You!

The Cvent Team

[For assistance, contact Customer Care](#)

You are receiving this email because you're a customer of Cvent

4.



## Reset Your Password

**New Password** Required

- Minimum 8 characters
- One uppercase letter
- One number
- One lowercase letter
- One special character
- Maximum 20 characters

\*Note: Your new password can't be the same as your last five passwords.

**Confirm Password** Required

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### Helpful Resources – Cvent Community Articles

- Exhibitor Admins
  - [Using the Exhibitor Portal](#)
  - [Adding Custom Questions in the LeadCapture Exhibitor Portal](#)
  - [Assigning Registrations to Onsite Staff in the Exhibitor Portal](#)
- Onsite Booth Staff
  - [Scanning LeadCapture Leads](#)
  - [Why aren't my leads or attendees syncing?](#)