

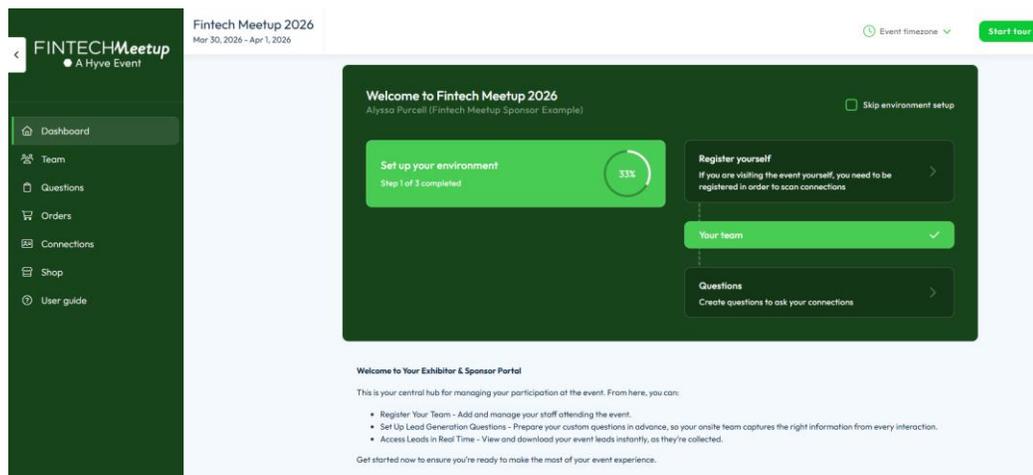
LEAD RETRIEVAL – APP ACCESS & USE ON SITE

Before succeeding the below steps, Please note the following:

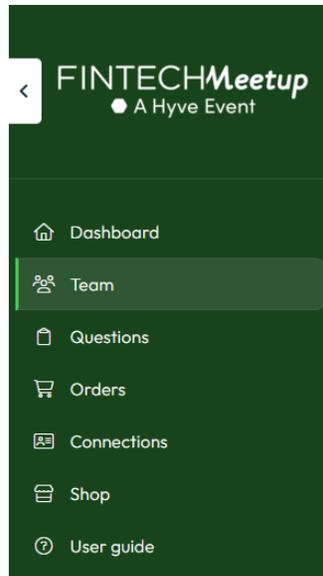
- **The intended designee of a license MUST be registered before being allocated a license. Please register all team members before following these instructions.**
- Once a QR code is scanned, that is a use of one of your licenses and cannot be undone. Only the person who the license is intended to be granted to should scan the QR code.
- **Section 1** is instructions for the main contact to allocate licenses.
- **Section 2** is instructions for the recipient of a license to activate and add the scanning app to their home screen for use on site.
- **Section 3** is how to use the application on site.

Section 1 – Allocating Scanning Licenses to Your Team

Step 1 – Access your Visit Dashboard



Step 2 – Navigate to Team on the left hand side of your dashboard.



Step 3 - Update the permissions for making connections for your team members

- Hover your mouse to the left of the permissions column on your team member, this will make a green edit pencil appear. Click the green pencil.

<input type="checkbox"/>	▼ Name	Email	Type	▼ State	▼ Attendance	▼ Connections	Permissions
<input type="checkbox"/>	Alyssa Purcell	[REDACTED]	EXHIBITOR REPRESENTATIVE	Registered	No show		

- Update the permissions you desire for each user. **Allow to make connections must be selected in order to grant a scanning license**

Open registration form

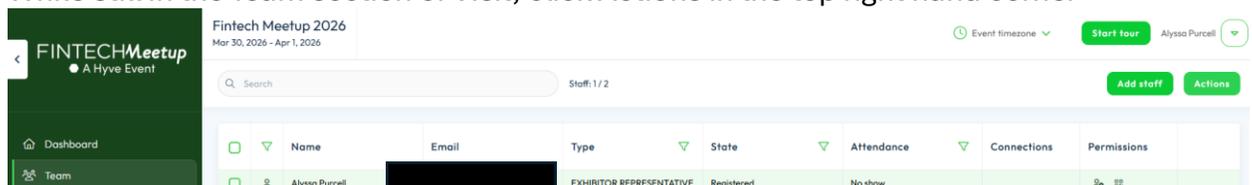
Permissions

- Admin permissions
- Allow to make connections
- Show all connections
- Allow export connections
- Allow to edit tasks

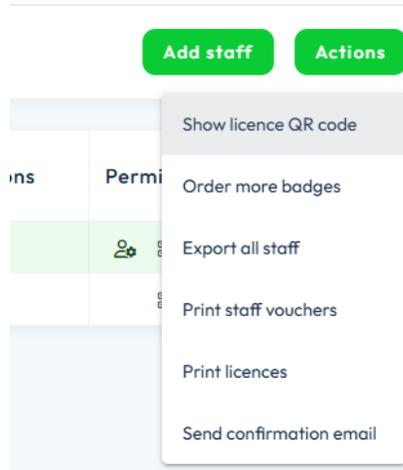
Cancel
Save

Step 4 – Send or Open the QR code

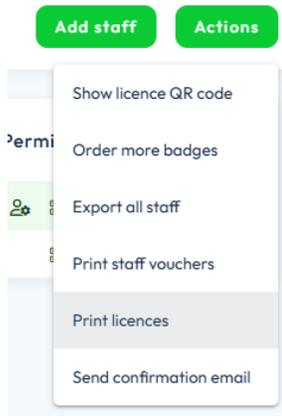
- While still in the Team section of Visit, click Actions in the top right hand corner



- **To activate a license immediately**, click Show QR code under Actions. Then scan the QR code that pops up. **REMEMBER** each scan of a QR code is a use of one of your licenses.



- **To send your team member a license**, click Print licenses under Actions. Save the PDF that appears and send it via email to your intended team member. REMEMBER, they must be registered before being allocated a license.



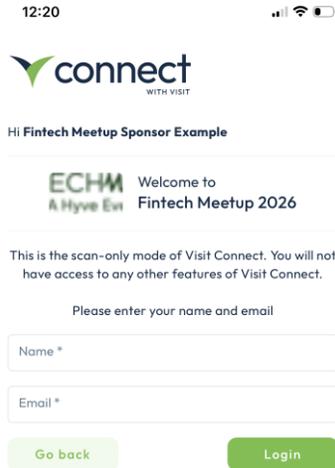
NOTE: You will see a Questions Section on the left hand side of your dashboard. This will not be in use for this show and can be disregarded.

Section 2 – Activating a License and Preparing for Onsite Use

Step 1 – Scan the QR code

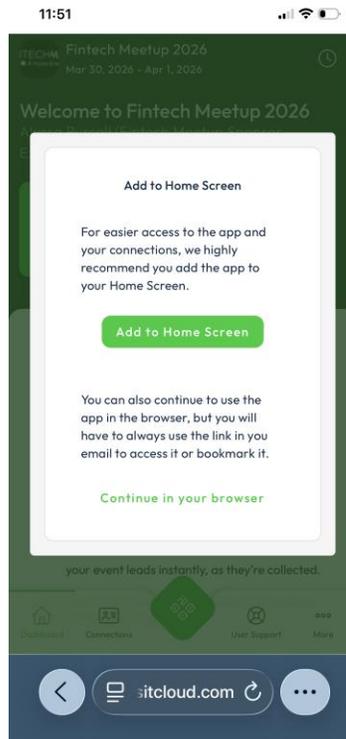
- Reference step 4 in section 1

Step 2 – Enter your name and Email. You MUST already be registered.

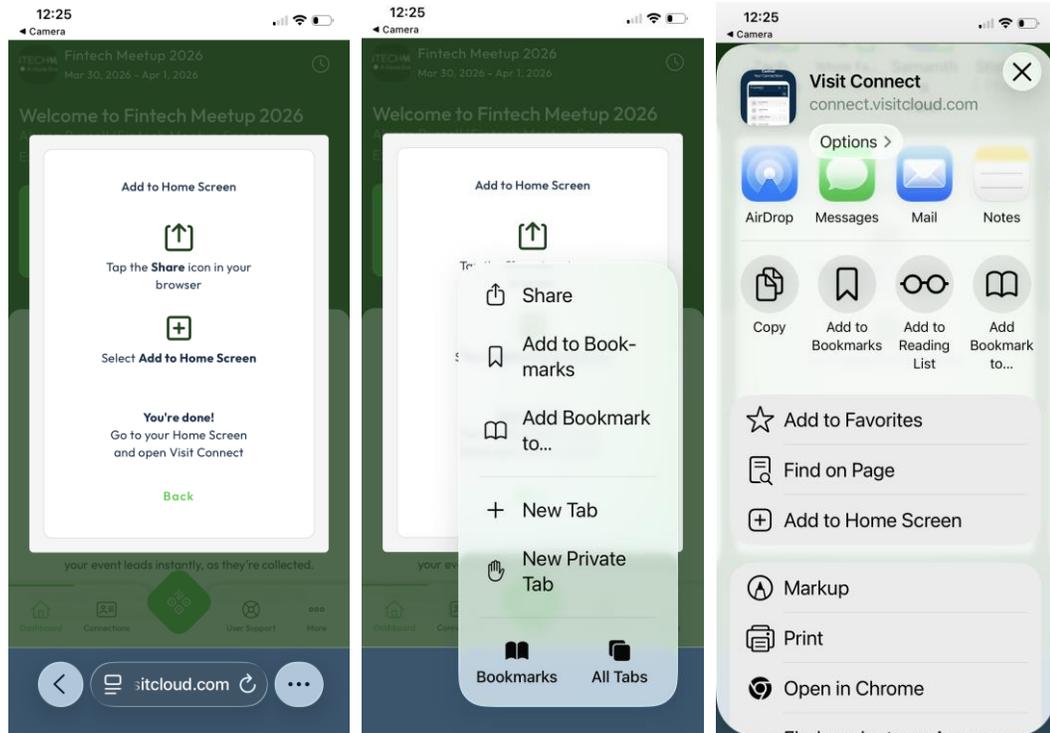


Step 3 – Add Scanning App to Your home screen. This is necessary for onsite use

- Click Add to Home Screen



- Follow the pop-up instructions. Click the Share button in your browser, then Add to Home Screen



You are now ready to use the scanning application on site.

Section 3 – Using Lead Retrieval Application On Site

Step 1 – Open the Connect App from Your Home Screen

- You MUST have followed step 3 in Section 2



Step 2 – Scan a badge

- Click the green diamond in the bottom of the screen
- Allow Access to Your Camera
- Position your camera over the QR code on the badge of the attendee you wish to scan.

