

LEADS APP

# USER GUIDE



Ditch the expensive scanning technology and acquire more qualified leads using your smart phone.

## SET-UP

Edit your personal profile and company profile, then download the Leads app.



## LEADS APP

The Zerista Leads app is your lead scanner & on-the-go address book for the leads you collect at the event.

Add leads either manually or by scanning QR codes.

## EVENT APP & WEBSITE

YOU CANNOT scan leads with the event app.

YOU CAN manage and export your leads using the event app & website.

## DOWNLOAD THE LEADS APP

 ZERISTA LEADS

Search for “Zerista Leads” in the app store on your iOS or Android device



## COLLECTING LEADS

Scan an attendee's QR code  
Scan the attendee's badge, or ask the attendee to log in to the app and click 'My QR Code.'

Manually add the lead  
Enter their contact information by hand.

An attendee adds your company to their contact list  
Your company can be added via the app or website.

An attendee scans your company's QR code  
Located on your company profile page on the website.

## ADDITIONAL FEATURES

### Notes

Add notes to each lead you collect. You can add information that is missing from their profile or tips to help you remember your conversation.

### Interact

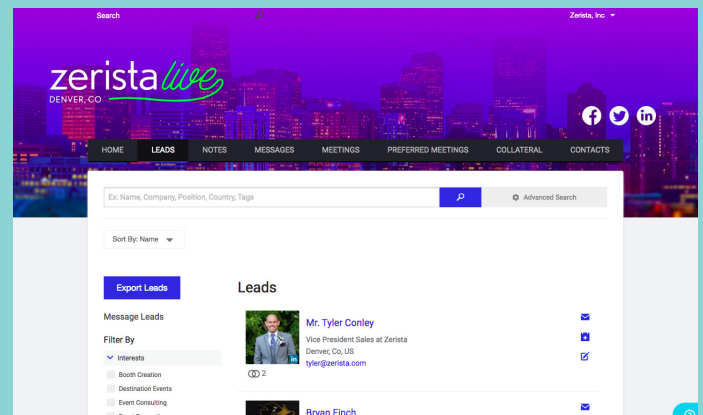
Call, text, email, or message your leads from the Leads app.

## EXPORTING LEADS

You can export your company's leads from the event website or from the Zerista Leads app on your iOS or Android device.

### EXPORT FROM THE EVENT WEBSITE

- Log in and select your company profile
- Click the **'Leads'** tab
- Click the **'Export Leads'** button
- You will receive an email with an attached CSV file that includes contact information, notes, and more



### EXPORT FROM YOUR iOS OR ANDROID DEVICE

- Tap the share icon at the top of the Leads page



iOS SHARE ICON



ANDROID SHARE ICON

- The Leads app will only successfully add leads when your device is connected to Wi-Fi or a network.
- Everyone who has been associated as a company contact can collect leads.

- Each company contact will see the same list of leads.
- Company contacts can add separate notes to the same lead.

