SwiftLeads Android version - Documentation and FAQ v3.10.17

This document covers the basic usage of the app: setting up a device, generating a lead through a scan, adding notes and qualifiers, and saving.

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General Information:

SwiftLeads for Android is the industry's most versatile lead capture app. You can set your device to read any barcode format including 1D, QR, and PDF417. You can also read NFC tags and beacons.

Exhibitors can create individualized custom qualifiers and questions so they can qualify, take notes, and edit leads easily and quickly. You can also edit attendee data if needed.

Real time email follow up enables users to automate email messages and send relevant literature as leads are generated.

As you scan each new lead, the previous lead is automatically, saved allowing you to move seamlessly from customer to customer without worrying about data loss.

Setup:

Depending on the origin of the device running the app, a device may require setup. If it is a rental unit, the device has been already configured for the show and no setup is required.

If you are downloading the app through Google Play, you must visit the setup screen. If this is your first time downloading the app, you should be presented with the setup screen immediately. If a show has been set up prior, you must click the menu ("...") button at top-right corner of the main screen and select the top option, *Setup*.

Once at the setup screen, you will have several options available to set up a show. Please note that a show manager must first have created a license for you in the Reporting Portal (See Reporting Portal FAQ for more information).

Option 1: Enter email. The app will load your show based on the license(s) associated with your email. If there are multiple licenses, you will be given a selection of shows to choose from.

Option 2: Enter license code. This is a code generated when a manager creates a license. This code can be emailed to you through the Reporting Portal.

Option 3: Select "Scan Activation Code" and scan a license QR code through the camera on your device. License codes are also generated through the Reporting Portal and can be emailed as well. This will fill the text field with the associated license code.

Regardless of the option, you must then select *Setup App* to set up the show.

Scanning:
A scan can be performed with either our Bluetooth scanner (SwiftScan) or the device's camera. Note that the scanning methods are set in the show's configuration parameters or can be changed in the device's parameters.

If using a Bluetooth scanner: Ensure the SwiftScan device (the sled) is on by pressing either of the two buttons on the sled. The sled should automatically connect to the app and indicate connection with a small audio clip. You may then proceed to scanning barcodes by directing the scanner's laser at the target barcode. Leads should appear on the screen when you scan.

If using the device's camera: Press the *Scan* button at the top and capture a complete barcode image in the middle of the screen. The app should return to the main screen, displaying the captured data.

Saving a Lead:
When you are ready to save a lead and send it to the server, press *Save Scan*. The banner at the top of the app should update momentarily when the lead is sent, displaying the show name and [(leads captured) / (leads sent)]. (**Note**: leads captured should equal leads sent if saved successfully.)

Scanning any new lead will automatically save the previous one. In addition, leaving a lead on the screen for an extended period will cause it to automatically save.

Changing Sessions:
If the show is configured with different sessions, a dropdown box with a session title will be visible on the main screen. Clicking this list will allow a user to change the session. The session will be saved along with lead data whenever a scan is performed.

Notes and Qualifiers:
Any lead can have a note attached to it. Click the white box above the lead information and enter the note using the phone's keyboard.

If qualifiers are set up for the show or the user license, they will appear below the lead upon scanning. If configured, the system will send any documentation associated with selected qualifiers to the lead's email when the lead is saved, allowing you to immediately provide your leads with relevant brochures or messages.

Editing Leads:
Select the *Leads List* button at the top of the main screen to see a list of leads. Selecting a lead from this list will bring you to another screen showing the lead details. Notes and qualifiers can be edited during this time. Click *Save* to save the changes on the server. **If you do not press Save, your changes will be lost.**

Menu Options:
Help - Displays a code to be used as both the user's login and password when retrieving their leads through the portal on the website. Also displays some technical information.

Send Login Info - Sends an email with the user's login and password to the specified email.