

cvent | LeadCapture License Set-up

View directions below to create and manage licenses.

1.) Click the link associated with your event and enter the requested information then hit 'Create Account'



THE 12TH ANNUAL HEDIS® & QUALITY IMPROVEMENT SUMMIT [H950]

Enter details to add your company.

Email	
tdshalley@gmail.com	
Your Company Name	
RISE	
First Name	Required
Тгеу	
26 characters remaining	
Last Name	Required
Shalley	
23 characters remaining	

Create account

For help on how to use the lead capture tool you can to take a look at this article or review this video demo here

 You will then receive an email from our Customer Care team that grants your access to your exhibitor profile for the event. Please note this profile is not outward facing and is only meant for managing lead capture services. Click the Log In Button.

Hi Exh	ibitor Admin,
Welco be ab	me to RISE National 2022 [H2688]. When you log into your account you'll le to:
	Add your booth staff to your team's account Assign your LeadCapture licenses to a team member Customize Lead Qualification Questions Export lead information from your event
Log ir Lo If ano new u work i	to get started. Enjoy the event! g in ther person should be managing your account, you can add that person as a ser after you log in. This invitation is unique to your email address and won't for anyone else.

3.) Once you're logged in you can now manage the Admin features for your company, such as adding booth staff, purchasing licenses (Get License), assigning licenses to your booth staff, modifying lead questions and reviewing your leads as they come in.



Welcome to The 12th Annual HEDIS® & Quality Improvement Summit [H950]

For help on how to use the lead capture tool you can to take a look at this article or review this video demo here

4.) To find your booth staff click on the button 'Find Booth Staff' button and you should see this prompt screen. Select the add booth staff button on the top right and search the attendee list for your team members. When searching make sure that you're using the email that your team members entered when registering for the conference. You can also search with their confirmation code.



- 5.) You are also able to add Admins to help manage the Exhibitor Portal on the Admin tab in the image above. You'll just need to fill out their first name, last name and email address and they should receive the same email found in Step 1 on this document.
- 6.) In order to begin scanning for leads, you'll lead to assign your license(s) to your booth staff. Select the 'Assign Licenses' feature of the homepage of the Exhibitor Portal



For help on how to use the lead capture tool you can to take a look at this article or review this video demo here

7.) You should see the correct amount of App Licenses listed in your profile on the page. In the options button for each license, you have the ability to assign those licenses to team members that are booth staff. You can also unassign and reassign the licenses as well during the event if the Capture Service need to change between staff. Please note that once a license has been activated on a device and used, it cannot be transferred.

Available Licenses		
My Current Licensing for		
App Licenses 0 Purchased 1 Planner-Provided 0 Assigned	1 Remaining	
Device Rental Licenses	0 Remaining	
About License Codes Image: Access codes allow your booth staff to log in to the Cvent LeadCapture app at the event.		
n-4lqwgou Lead Ratrieval - Bring Your Own Device license Available	Options 💟	

8.) You must add booth staff in order to assign the license. When you go to assign the license(s) all booth staff should appear in that window to select from

Assign License n-4lqwgou to:	Close \times
Trey Shalley tshalley@fraconferences.com	
Assign Cancel	

9.) Once your licenses have been assigned, your Booth staff receiving them should receive an email our Customer Care team prompting them to download the cVent Lead Retrieval app from the Apple Store or Google Play. An access code to activate the capture tool is found within the email as well.

Hi Trey Shalley,		
You've been added as a lead gatherer to collect leads at RISE National 2022 [H2688].		
Use the link below to download our lead scanning app, Cvent LeadCapture, on your iOS or Android device. Once the app is downloaded, log into the app with your access code.		
Access code: n-4lqwgou		
Don't share your access code with anyone else it won't work for them. Once your code has been used, you won't be able to use it on any other device.		
Download on the App Store Get IT ON Google Play		
Sincerely,		
RISE Customer Care		

For help on how to use the lead capture tool you can to take a look at this article or review this video demo here