

What is fielddrive Leads?

fielddrive Leads is a powerful and streamlined on-site lead retrieval and qualification app designed to help you get the most out of your event exhibitor booths.

Built with simplicity and speed in mind, the app offers a highly intuitive user experience and a fine-tuned user interface that makes lengthy training periods obsolete.

Thanks to our simple tap-and-scan design philosophy, lead retrieval at events has never been easier.

How does it work?

fielddrive Leads allows you to scan every potential lead during events with these three simple steps:

- **Scan the visitor's badge**
  All known information will pop up on your device and can be edited.
- **Qualify the lead…**
  with default and custom lead questions and categorise them as Hot, Warm, and Cold for prioritised follow-ups.
- **Share information**
  Select brochures, files and web links and send them straight to the visitor.

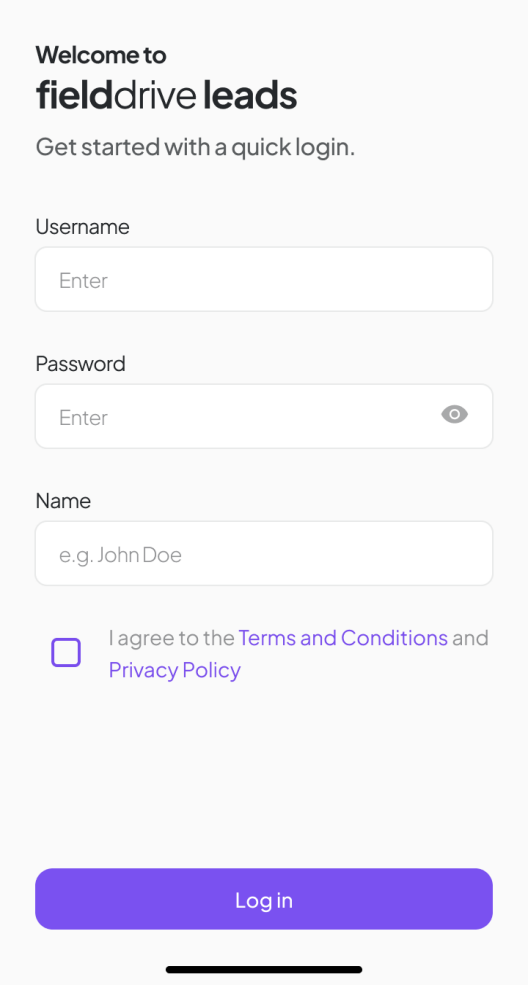
How to use fielddrive Leads?

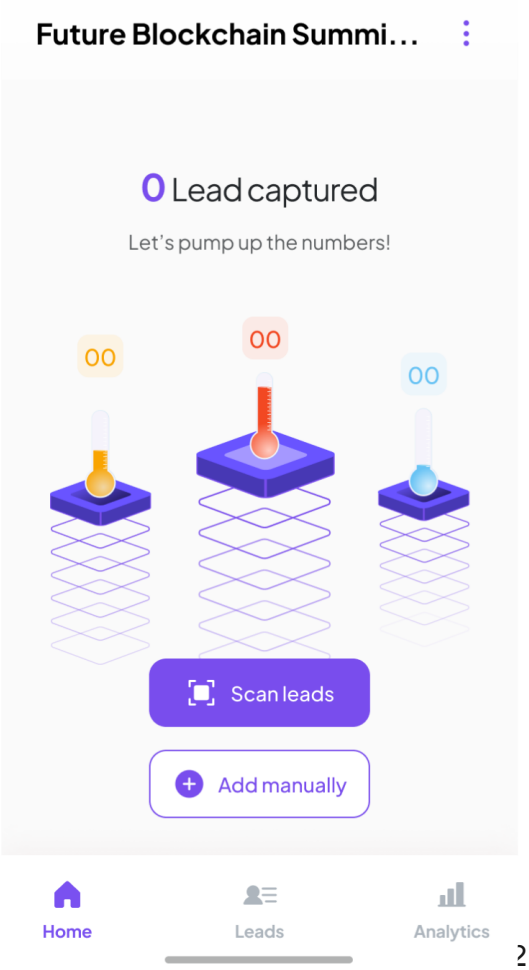
Install the App & Log In

Download the app from the store:

Download on the App Store GET IT ON Google Play

1. Launch the app on your device. You will land on the above login page.
2. Enter the credentials you received via email.
3. Add your name to keep track of the leads that you've scanned during the event.
4. Accept the **terms and conditions** & **privacy policy**.
5. Tap **Login.**





6. After a successful login, you will land on the **home screen**. It provides the following details:
    a. The total number of leads captured by the *logged-in account* during the event.
    b. The leads are broken down into three categories based on their relevance and value to your business:
        - Hot
        - Warm
        - Cold

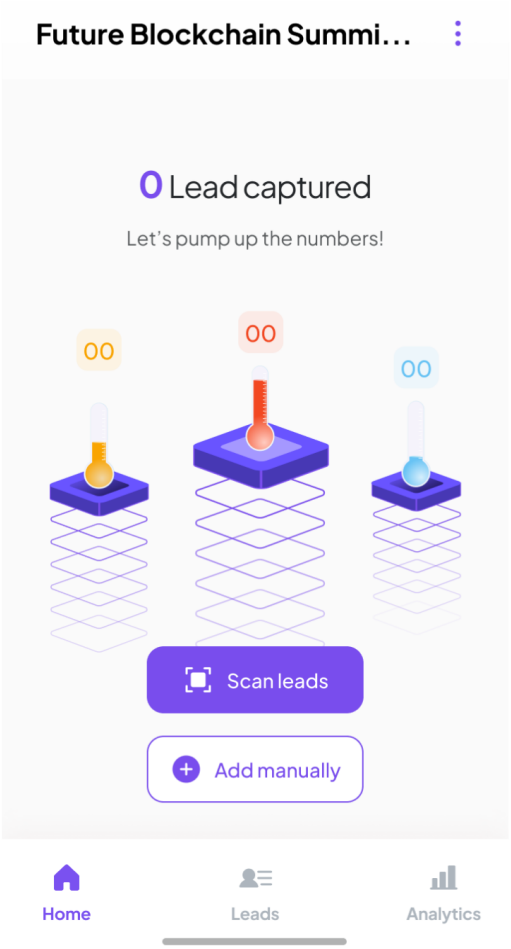
Collecting Leads

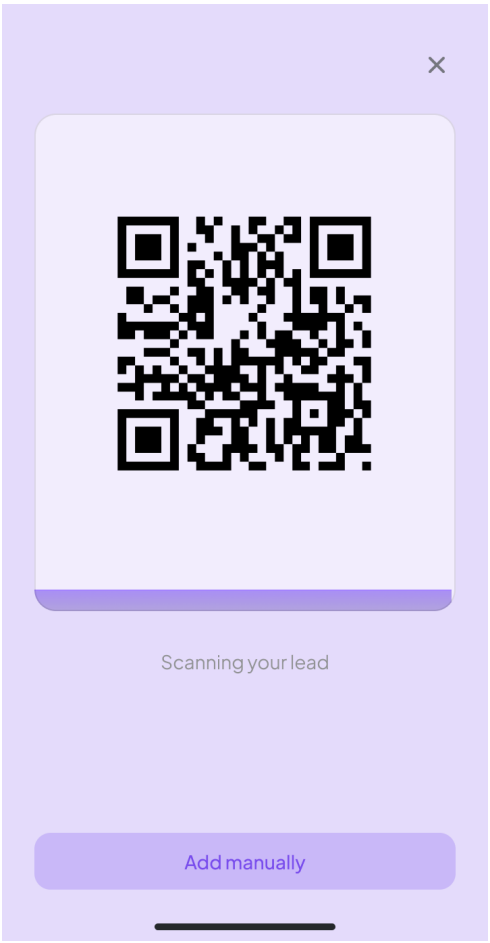
There are two ways to collect leads:

Scan Leads

1. To scan visitor badges, tap on the **Scan leads** button. It will launch the QR scanner on your device.

2. Align your device camera with the QR code on the visitor badge. The app will scan the QR code, retrieve all visitor data from the server, and redirect you to the visitor details page.

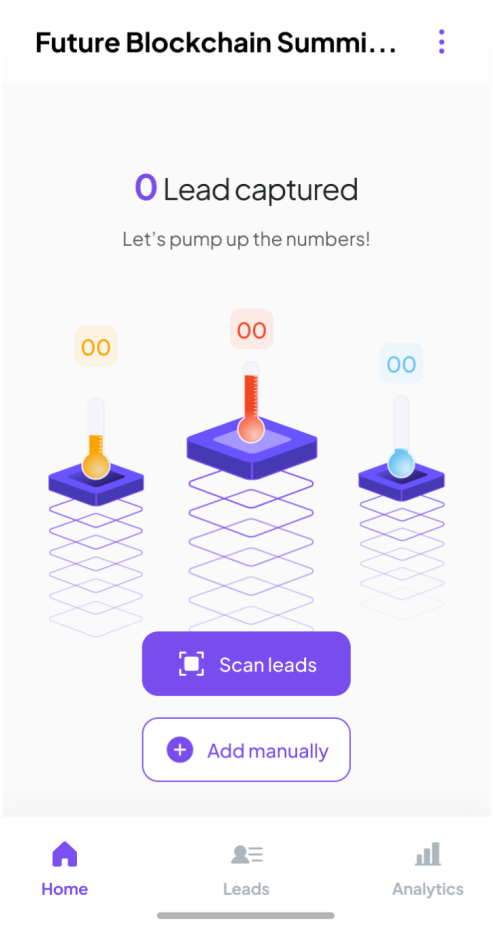


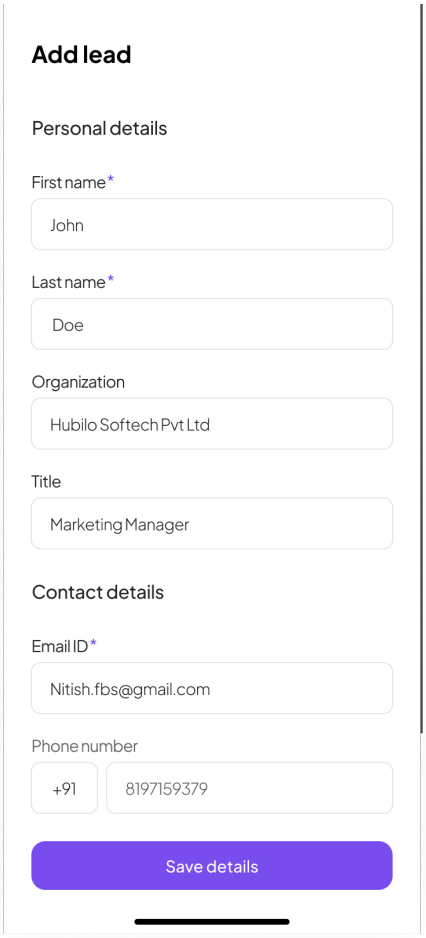


Add Manually

1. To add visitor data manually, tap **Add manually** on the home screen.

2. You will be redirected to the **Add Lead** page. Here, add visitor information to the relevant fields. (***** —> **Mandatory field**)
3. Tap **Save Details**.
4. You will be redirected to the visitor details page.





Lead Qualification

Regardless of which method you choose to collect leads, you will be redirected to the visitor details page next.

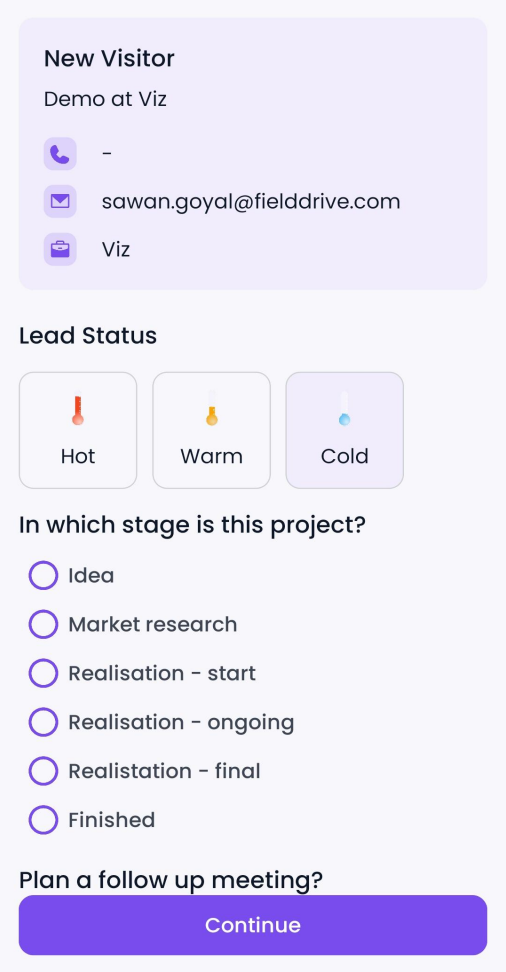
1. You will find all the visitor information at the top of the visitor details page.
2. The page will also contain a list of pre-loaded lead qualification questions.
3. You will also find all your custom lead qualification questions here. You can add custom questions from the exhibitor dashboard.

   NOTE: *Use the same credentials to log in to the dashboard as the app. If you need assistance, please get in touch with our customer support at support@fielddrive.com*

4. Based on visitor answers, you can qualify a lead as *Hot, Warm, or Cold*.

   WARNING: *This feature will only work if you don't make any changes to the* ***Lead Category*** *question in the exhibitor dashboard.*

5. Once done, tap on **Continue**.

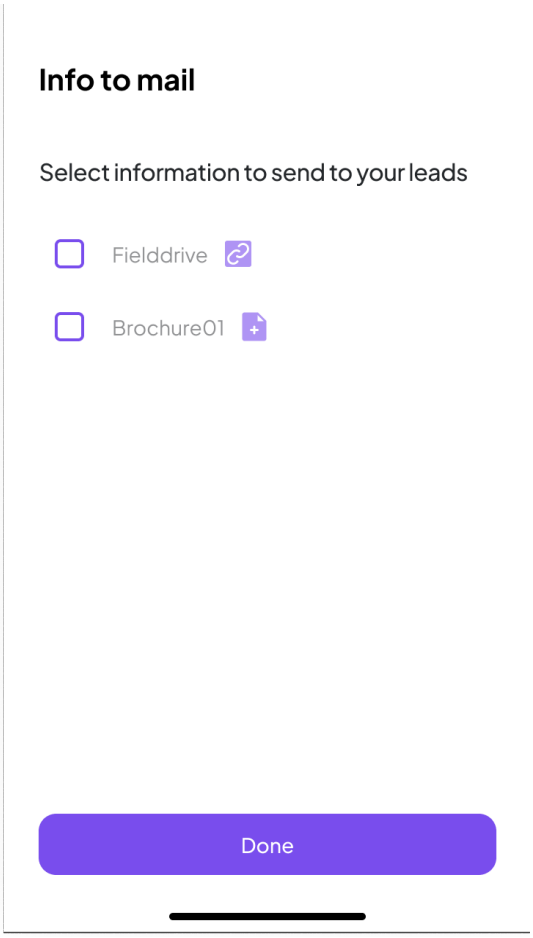


6. If you haven't added any exhibitor material, then you will be redirected to the home screen.

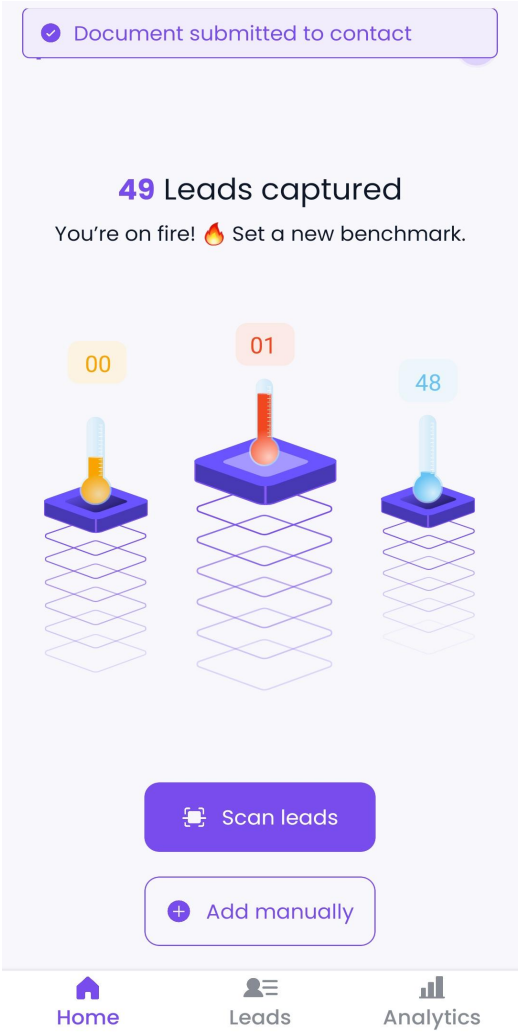
   NOTE: *You can add exhibitor material from the exhibitor dashboard.*

7. However, if you've added exhibitor material, you will be redirected to the **Info to mail** page instead.

8. Here, you can select which material you want to send to the visitor. Once you've selected the desired material, tap **Done**.



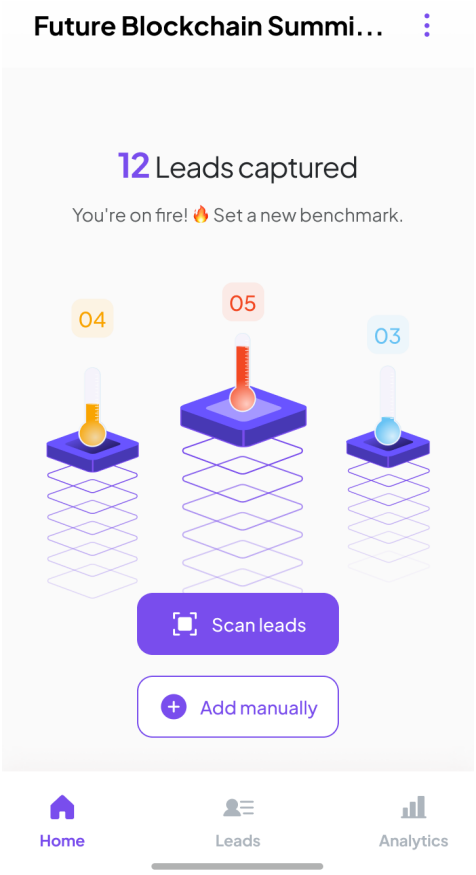
9. The material will be sent to the visitor via email, and you will be redirected to the home screen.
10. On the home screen, you will see the **Leads captured** counter increase by one.
11. Similarly, based on your selection during the qualification process, you will also see one of the **Hot, Warm,** or **Cold** counters increase by one.

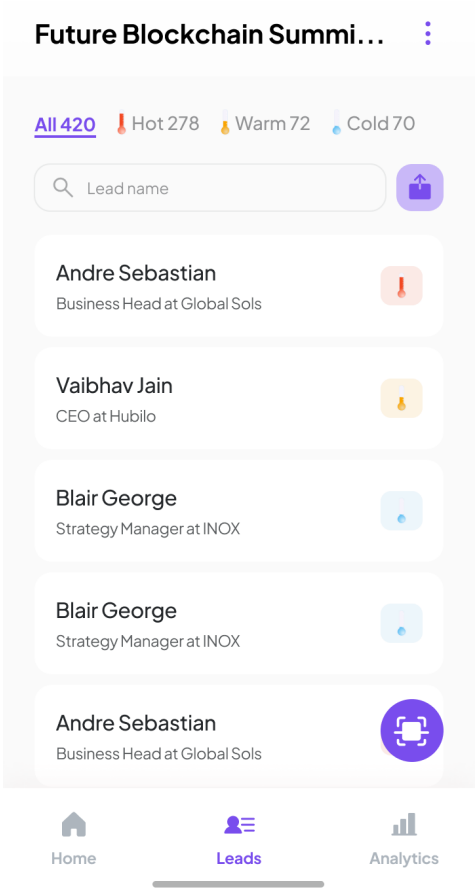


Checking/Editing Leads

You can also check and edit your leads.

1. To check the list of all leads that you've scanned during the event, tap on the **Leads** button at the bottom of the home screen.
2. You will be redirected to the **My Leads** page.



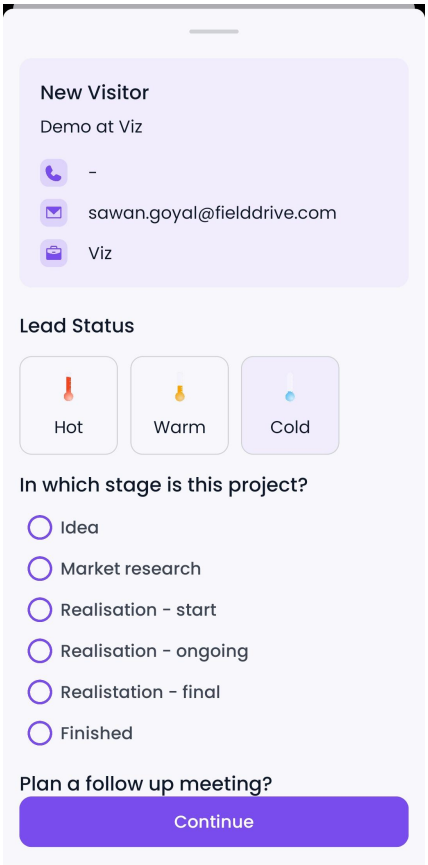


3. The leads are divided into four sections:
    a. **All Leads**(list of all the list)
    b. **Hot**(list of all hot leads)
    c. **Warm**(list of all warm leads)
    d. **Cold**(list of all cold leads).

4. You can also look up a lead/visitor contact by typing their name in the search bar.
5. You can download the lead report directly to your device by tapping the **download** button in the top right corner.

   NOTE: *Downloading the report can take a few minutes.*

6. To edit lead details, tap on the lead. You will be redirected to the visitor details page, where you can make the changes.



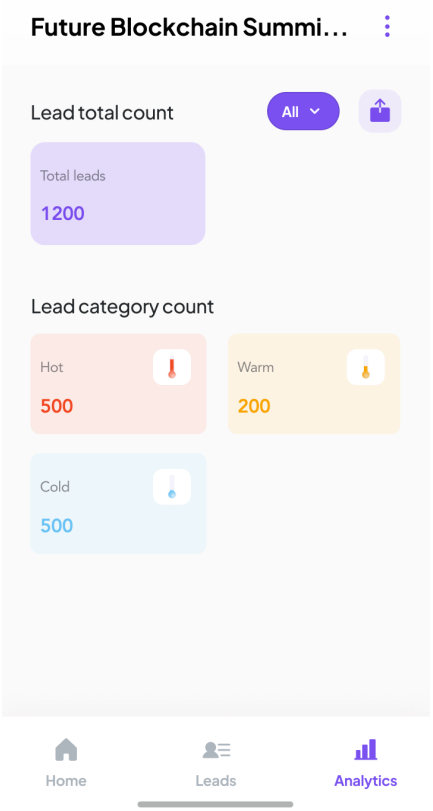
7. Once done, tap **Continue,** and the changes will reflect on the My Leads page immediately.

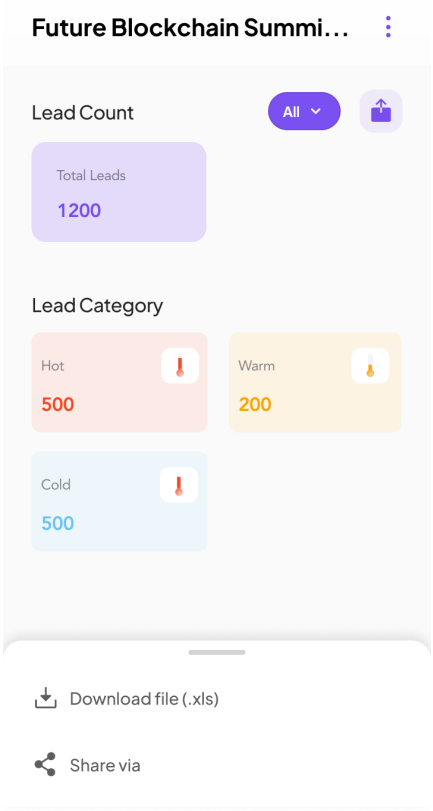
   NOTE: *You can't change visitor information once the lead is saved. Only their answers to your questions, additional notes, and lead status can be changed*

Checking Analytics

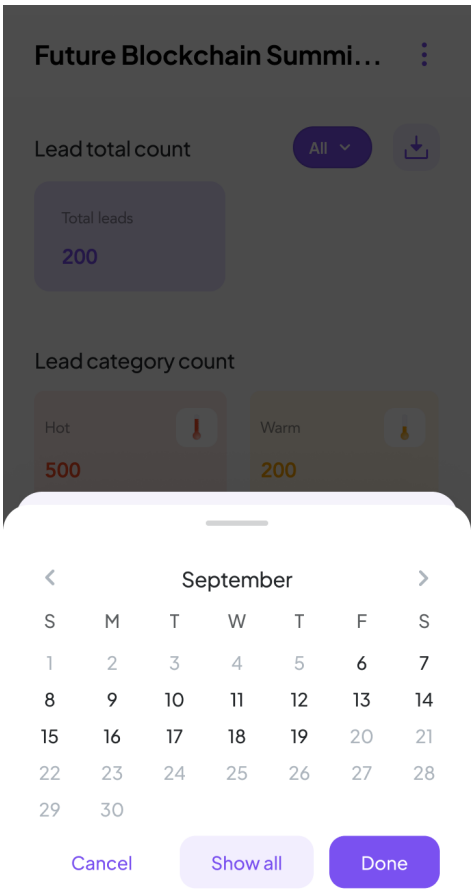
Analytics play a key role in the on-site lead retrieval process. You can check and download real-time lead analytics with fielddrive Leads.

1. You can check lead analytics anytime you want to by simply tapping on the **Analytics** button at the bottom.
2. On the **Lead Count** page, you will find all the key lead stats:
    a. Total leads
    b. Hot
    c. Warm
    d. Cold
3. To download lead data, tap on the download button in the top right corner. *fielddrive Leads allows you to download lead data anytime you want to.*





4. You can also apply a date filter from the dropdown at the top of the page. You can use this filter to select specific dates if you wish to check the number of leads collected on any particular event date.
5. Tapping on the dropdown will open a calendar. Select the date and tap on **Done**.



6. The data will be available on the Lead Count page instantaneously.
7. You can also check the stats for the entire event by tapping on the **Show All** button.