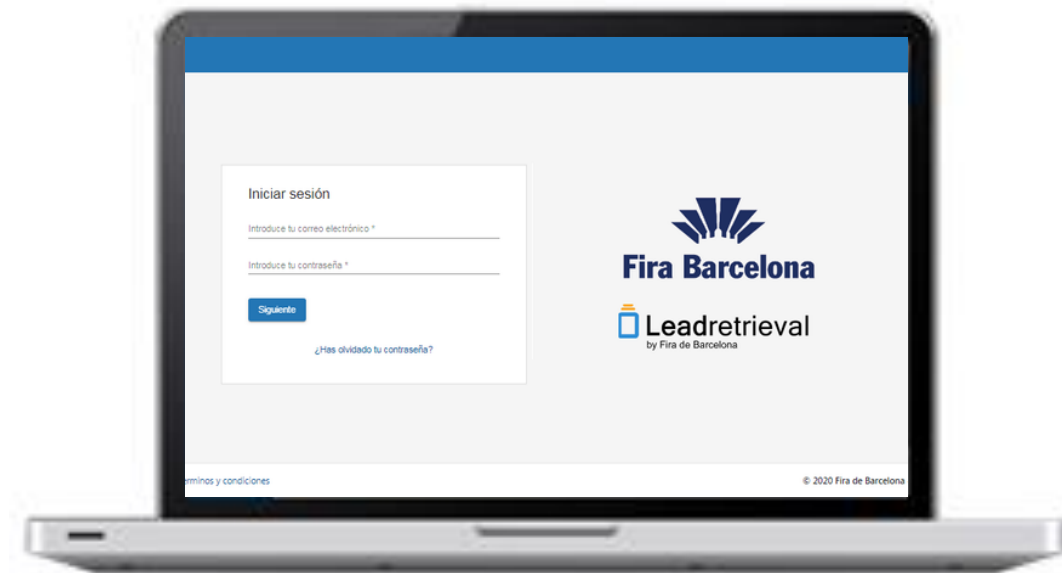


# Web Portal Manual

Convert leads into qualified  
business opportunities in  
real-time

# WEB PORTAL



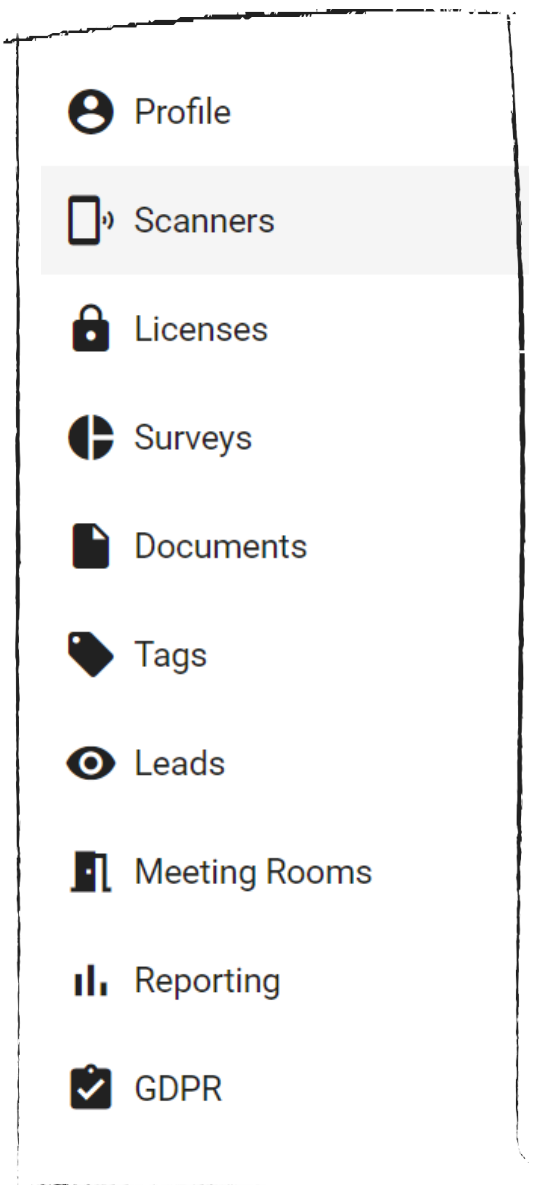
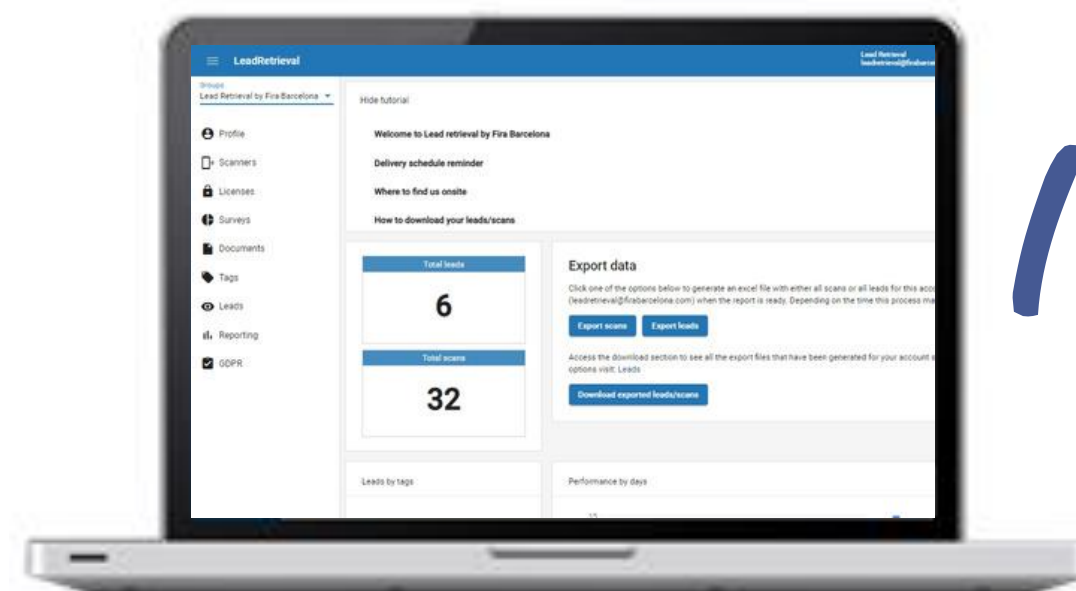
## ACCESS THE WEB PORTAL

As the administrator you can access your web portal account with the e-mail that was used to make the purchase.

## CUSTOMIZE THE SERVICE

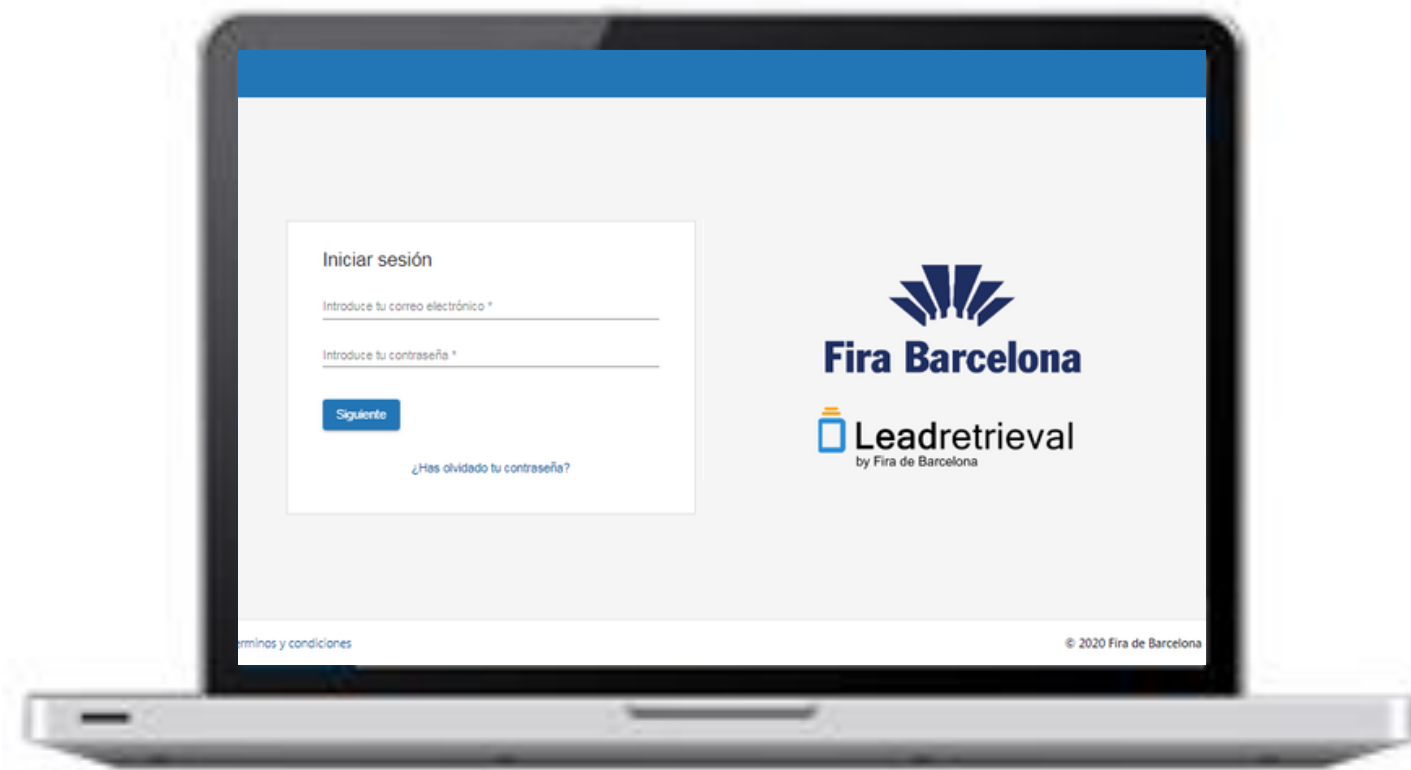
Within the web portal, you can view your Leads and Scans in real-time as well as customize the additional features before the event.

After the event, download all of your Leads and Scans with a single click.



01

# ACCESS



## SIGN IN

in the following link: <https://lrback.firabarcelona.com> with the credentials of the administrator.

Input the administrator e-mail as well as the generated password that you should have received with the credentials e-mail.

Please check your SPAM folder if you can't find it, otherwise contact us directly so we can re-send it.

If you don't know who's the administrator of your company's Lead Retrieval account please contact us directly.

# MENU

Groups

Lead Retrieval by Fira Barcelona ▾



Profile



Scanners



Licenses



Surveys



Documents



Tags



Leads



Welcome Mail



Meeting Rooms



Reporting



GDPR

**Access to your events/accounts**

**Change your account information**

**List of logged scans**

**Licenses information and company code**

**Create surveys and configure workgroups**

**Upload documents**

**Create tags**

**View and download your leads/scans**

**Create a Welcome e-mail**

**View and download your meeting rooms reports**

**View reports (in real-time)**

**Create a consent pop-up**

03

# WEB PORTAL

## CUSTOMIZE THE SERVICE

To be able to use our service at its full performance, we advise our clients to configure the service (set up all the external features) before the event starts.

To do so, you must be logged-in to the Web Portal as the configuration will take place there. In this guide, we will explain how to configure the service from the Web Portal.

**GDPR CONSTENT  
POP-UP**

**DOCUMENTS**

**SURVEYS**

**TAGS**

# GDPR CONSTENT POP-UP

The screenshot shows the 'LeadRetrieval' application interface. The top navigation bar includes a menu icon, the text 'LeadRetrieval', and links for 'Lead Retrieval', 'leadretrieval@firabarcelona.com', 'Help', 'Log out', and 'Recover user'. The left sidebar shows 'Groups' with 'Lead Retrieval by Fira Barcelona' selected. The main content area is titled 'GDPR' and contains the 'General Data Protection Regulation Configuration' section. This section includes a descriptive paragraph and three checkboxes, all of which are checked and marked with callout 1. Callout 2 points to the second and third checkboxes. Below this is the 'Display fields' section, which includes a 'Description' field (marked with callout 3) containing the text 'We would like to inform you of our privacy policy and the process to modify the data you share with us', a 'Url description' field (marked with callout 4) containing 'Read our GDPR documentation', and a 'Url' field (marked with callout 5) containing 'i.e: https://cloud.google.com/security/gdpr'. At the bottom, there are four custom fields, each with a checkbox. The first three are checked and marked with callout 5, while the fourth is unchecked.

LeadRetrieval

Lead Retrieval  
leadretrieval@firabarcelona.com

Help Log out Recover user

Groups  
Lead Retrieval by Fira Barcelona

/ GDPR

### General Data Protection Regulation Configuration

Enabling this option allows you to force a privacy policy confirmation dialog after all, or certain types of, scans. This way you can allow the visitor to log their acceptance of your privacy policy and their agreement to be included in certain marketing campaigns right at the moment of scanning. Please take a look at our [GDPR Guidelines](#) for more detailed information.

- ☒ Enable GDPR
- ☒ Force GDPR visualization after each advanced scan
- ☒ Force GDPR visualization after each fast scan

### Display fields

Description

We would like to inform you of our privacy policy and the process to modify the data you share with us

Url description

Read our GDPR documentation

Url

i.e: https://cloud.google.com/security/gdpr

Custom field #1

☒ Yes, I confirm I would like to receive marketing contact from this company

Custom field #2

☒ No, I do not confirm I would like to receive marketing contact from this company

Custom field #3

☒ Maybe, I will decide a a later time

Custom field #4

☐

- 1.Enable pop-up
- 2.Make the pop-up mandatory on Advanced scan and Make GDPR mandatory on Fast scan
- 3.A small summary/description

- 4.An URL and its description that can be opened and sent through the APP
- 5.Up to 4 checkboxes

05

# SURVEYS

Lead Retrieval

Lead Retrieval  
leadretrieval@firabarcelona.com

Help

Log out

Recover user

Groups

Lead Retrieval by Fira Barcelona

Surveys

Work groups

Surveys

Home

Surveys

Edit

Survey Information

Description \*

Survey

Name \*

Survey

☒ Visible

Questions:

Question 1

Question type \*

simple choice

☐ Mandatory

☒ Visible

Description \*

Question1

Question text \*

Question1

Answer 1

Description \*

Answer1

Add answer

↓ ×

Create and customize your own Surveys.

Types of questions featured:

- Simple and multiple choice
- Small and long text
- Date

Save survey to finish creating it.

06

# WORKGROUPS

[Home](#) / [Surveys](#) / [Work groups](#) / [Edit](#)

 Create work groups to assign different surveys to different scanners. A scanner can only be in one work group.

You can force surveys by making a Workgroup. Add your company scanners to a Workgroup and assign them the survey.

Name \*  
Workgroup1 Name of workgroup

Survey \*  
Survey Select the desired survey (out of your created surveys)

- ☒ Survey is mandatory
- Make survey as mandatory (will appear first after scanning)
- ☐ Mode FastScan disabled
- Disable the mandatory survey on fast scan

Scanners of my company available:  
☒ [Badge number]

Other scanners by Badge number:  
Badge number Select who will be part of this workgroup

Save

Add

Other scanners by badge number

add scanners manually  
(with their badge id)

Badge number:

ADD



# DOCUMENTS

After scanning a contact with the App you will be able to send him/her documents such as catalogues or product presentations onsite. In order to do that, upload your documents here to be able to use it on the APP.

LeadRetrieval

Lead Retrieval by Fira Barcelona

Documents

Lead Retrieval  
leadretrieval@firabarcelona.com

Help

Log out

Recover user

Documents

Document list

+ Upload file

+ Add link

Search

Name	File	Actions
FILE1	ENG MWC USER GUIDE.pdf	<div></div>
FILE2	ENG_MWC APP MANUAL.pdf	<div></div>
FILE3	ENG_MWC How to download your data.pdf	<div></div>
FILE5	User manual_ENG 03.2019.pdf	<div></div>

Upload documents or links.

Upload files of up to 5MB. You can upload up to 10 documents and links.

Items per page: 10

1-7 of 7

# TAGS

When scanning a lead, the user will have the option to tag it with whatever categories and tags were previously created in the Web Portal. This can be used to categorize potential customers.

LeadRetrieval

Lead Retrieval  
leadretrieval@firabarcelona.com

Help

Log out

Recover user

Groups

Lead Retrieval by Fira Barcelona

Tags

Tags

New tag

Category name \*

'Category name'

For example: 'Potential client'

Or select existing one

Tag name \*

'Tag name':

For Example: 'Interested in demo'

Create tag

Available Tags

Search

Category name	Tag name	Actions
FOLLOW UP	CALL TO DISCUSS PURCHASE	
NO INTEREST	NOT INTERESTED IN 'PRODUCT A'	
POTENTIAL CLIENTS	INTEREST IN DEMO	
POTENTIAL CLIENTS	INTERESTED IN GENERAL INFO	

# LEADS

Lead Retrieval

Lead Retrieval  
leadretrieval@firabarcelona.com

Help

Log out

Recover user

Groups

Lead Retrieval by Fira Barcelona

Leads

Export data

LEADS: all the attendees scanned with your devices, one line per attendee  
SCANS: each individual scan, possibly multiple lines per lead

Click one of the options below to generate an excel file with either all scans or all leads for this account (default) or for a specific scanner (select below). You will receive an email in your inbox (leadretrieval@firabarcelona.com) when the report is ready. Depending on the time this process may take a few hours to complete.

Export scans

Export leads

Access the download section to see all the export files that have been generated for your account so far. Click on the following button to download.

Download exported leads/scans

Leads

Choose scanner \*

Filter by scanner to download only those leads/scans


Search

Lastname	Firstname	Company	Jobtitle	E-mail	Scanner full name (Badge number)	Actions
List of all your Leads in real-time						





2. Lead information can be exported in an Excel file for later importation into your CRM, by clicking on the Export Scan or Export Lead button.
3. Access your generated files by clicking on 'Download exported Leads/Scans'

Your leads/scans report will be generated within seconds (or up to a couple of hours in case of a lot of simultaneous downloads) You can then download them directly from the web portal using the download exported leads/scans button

# LEADS

 / Leads / Exports

### History of exports

Type	Export generation date	Actions
Leads	2020-02-06 11:14:46	
Scans	2020-02-06 11:14:38	
Scans	2020-02-06 11:06:23	
Scans	2020-02-06 10:29:50	

Items per page: 10 1 - 4 of 4 |< < > >|

Your leads/scans report will be generated within seconds (or up to a couple of hours in case of a lot of simultaneous downloads) You can then download them directly from the web portal using the download exported leads/scans button

# MEETING ROOMS

Export and download your Meetings reports

Meeting Rooms scans

Export Meeting Rooms

Download exports

Select meeting

Meeting 4

Select a Meeting to view or export

x

List of scanned visitors with information and scan type IN/OUT

Search

Lastname	Firstname	Company	Jobtitle	E-mail	Scanner full name (Badge number)	Meeting	Scan type	Visit date
					Generic Scanner - 231	Meeting 4	In	2021-05-31 17:03:20
					Generic Scanner - 231	Meeting 4	Out	2021-05-31 17:04:16

Items per page: 10

1 - 2 of 2

Navigation icons: first, previous, next, last

# WELCOME E-MAIL

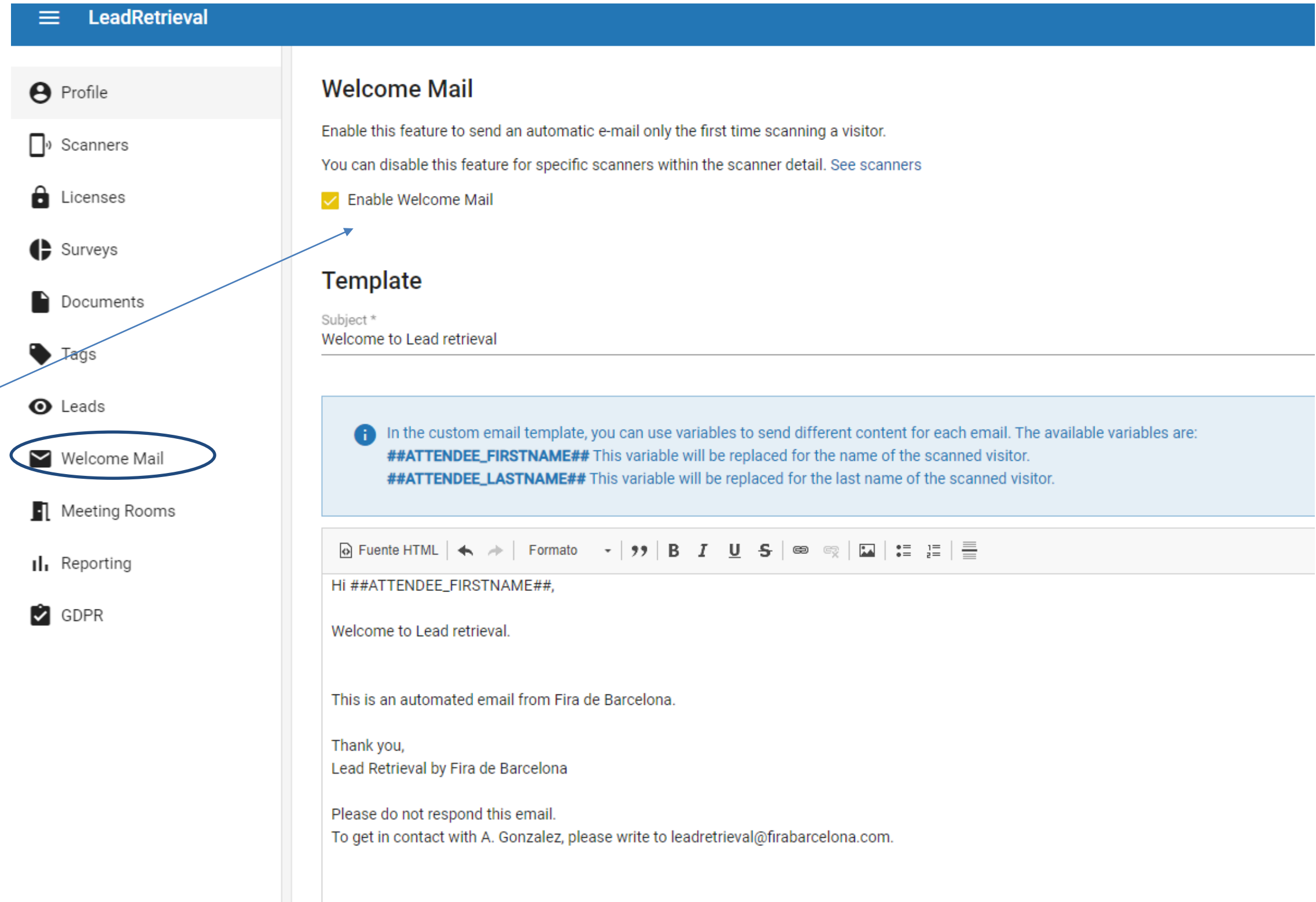
## SET IT UP

Access your account on the Web Portal and on the menu go to "Welcome E-mail".

To be able to use the feature, please make sure to enable it.

Write the subject and the e-mail body and save.

This welcome e-mail will be sent through the APP **only the first time** you scan someone.



**LeadRetrieval**

- Profile
- Scanners
- Licenses
- Surveys
- Documents
- Tags
- Leads
- Welcome Mail**
- Meeting Rooms
- Reporting
- GDPR

### Welcome Mail

Enable this feature to send an automatic e-mail only the first time scanning a visitor.  
You can disable this feature for specific scanners within the scanner detail. [See scanners](#)

☒ Enable Welcome Mail

### Template

Subject \*  
Welcome to Lead retrieval

**i** In the custom email template, you can use variables to send different content for each email. The available variables are:  
**##ATTENDEE\_FIRSTNAME##** This variable will be replaced for the name of the scanned visitor.  
**##ATTENDEE\_LASTNAME##** This variable will be replaced for the last name of the scanned visitor.

Fuente HTML | Formato | B I U S | [Icons]

Hi **##ATTENDEE\_FIRSTNAME##**,

Welcome to Lead retrieval.

This is an automated email from Fira de Barcelona.

Thank you,  
Lead Retrieval by Fira de Barcelona

Please do not respond this email.  
To get in contact with A. Gonzalez, please write to [leadretrieval@firabarcelona.com](mailto:leadretrieval@firabarcelona.com).



We advise that you keep the e-mail simple and, if possible, to create it directly on our web portal.


# WELCOME E-MAIL

## SCANNERS

To disable the Welcome e-mail on a specific scanner go to “Scanners” on the menu.

Then click here to access the information of that scanner.

Finally, once in the detailed information, you can toggle off the welcome e-mail here

#	Name	Badge number	Device Id	Role	Active
6348	Generic Scanner	-		Scanner	

### Scanner information

**Name:** Generic Scanner

**Device Id:**

**Role:** Scanner

**Active:** Yes

**Number of comments:** 1

**Number of tags:** 2

**Number of surveys:** 1

**Number of visits:** 7

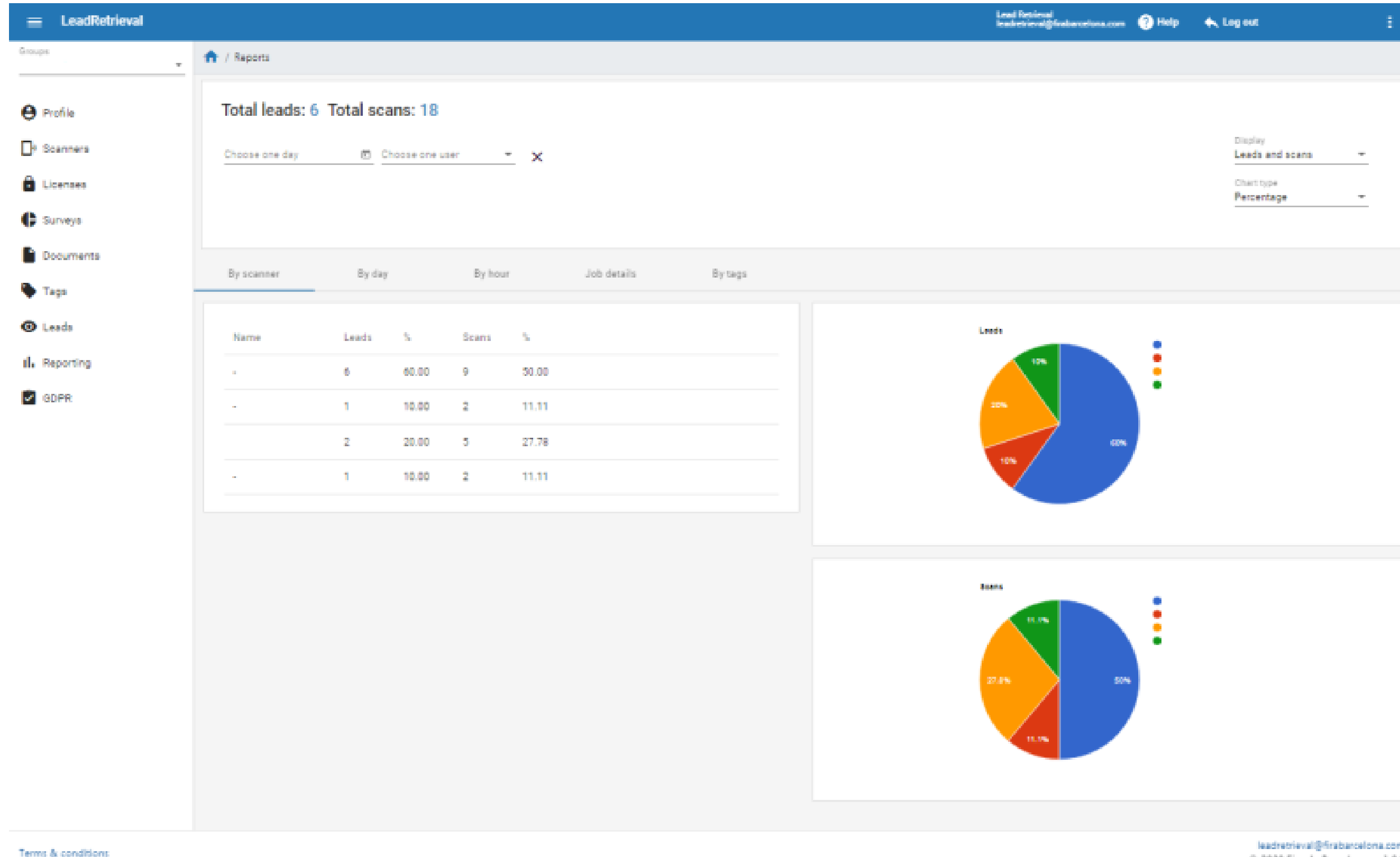
**Number of GDPR:** 7

### Configuration

☒ Enable Welcome Mail

You can disable [Welcome Mail](#) functionality for this scanner only.

# REPORTS



The Web Portal offers leads statistics and reporting with many options and filters inside the Reporting tab.

Filter by date or/and user and choose below how to visualize the information (by tags, by hour...)



# OTHER MANUALS

## **USER MANUAL**

Find more in-depth information  
about the service and its  
components

## **GDPR GUIDELINES**

## **APP MANUAL**

Discover how the Lead  
Retrieval APP works.

## **EXPORT YOUR DATA**

# Contact us



## EMAIL

[leadretrieval@firabarcelona.com](mailto:leadretrieval@firabarcelona.com)

## WEBSITE

<https://leadretrieval.firabarcelona.com/>

## PHONE

+34 93 233 2773