

Web Portal guide

Convert leads into qualified
business opportunities in
real-time

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I. Lead Retrieval

Lead Retrieval (LR) is a service by Fira Barcelona which functions is the capture and follow up (in real time) of leads in an event/congress.



It consists of 2 components: **Web portal** (which acts as a database) and **APP**. **To use the service at its full potential, first configure the service** on the web portal to later on use it on the APP.

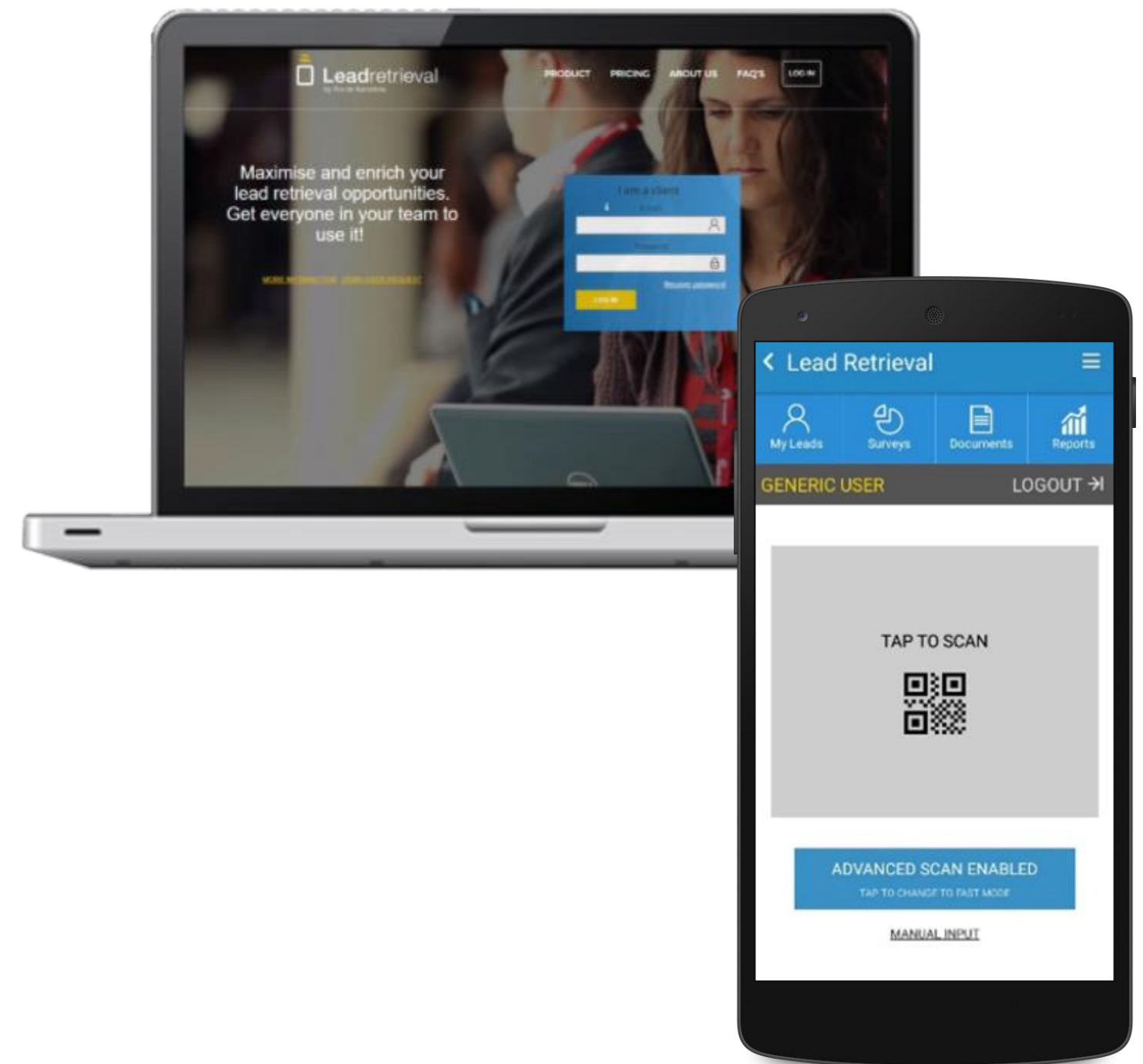
I. Lead Retrieval

WEB PORTAL

- I. **Before the event:** Set up the service and additional features (to use on the APP).
- II. **During the event:** Database works in real time, reports on functionality.
- III. **After the event:** Download all the information in an excel file.

APP

- I. Scan visitors badges
- II. Captures de visitors information
- III. Additional features: Conduct surveys, send documents, add tags and notes, request consent.



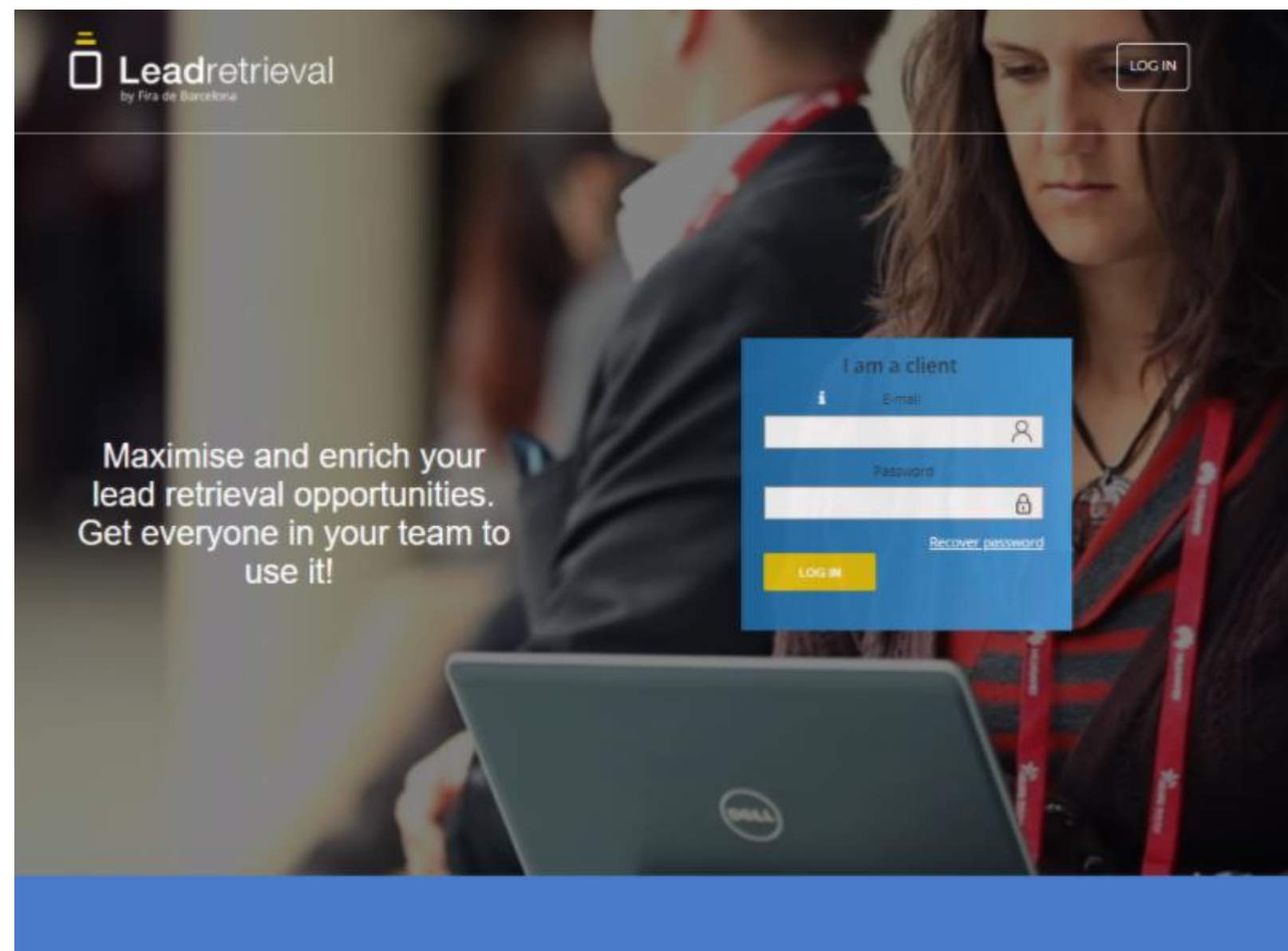
II. Web portal

SIGN IN

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



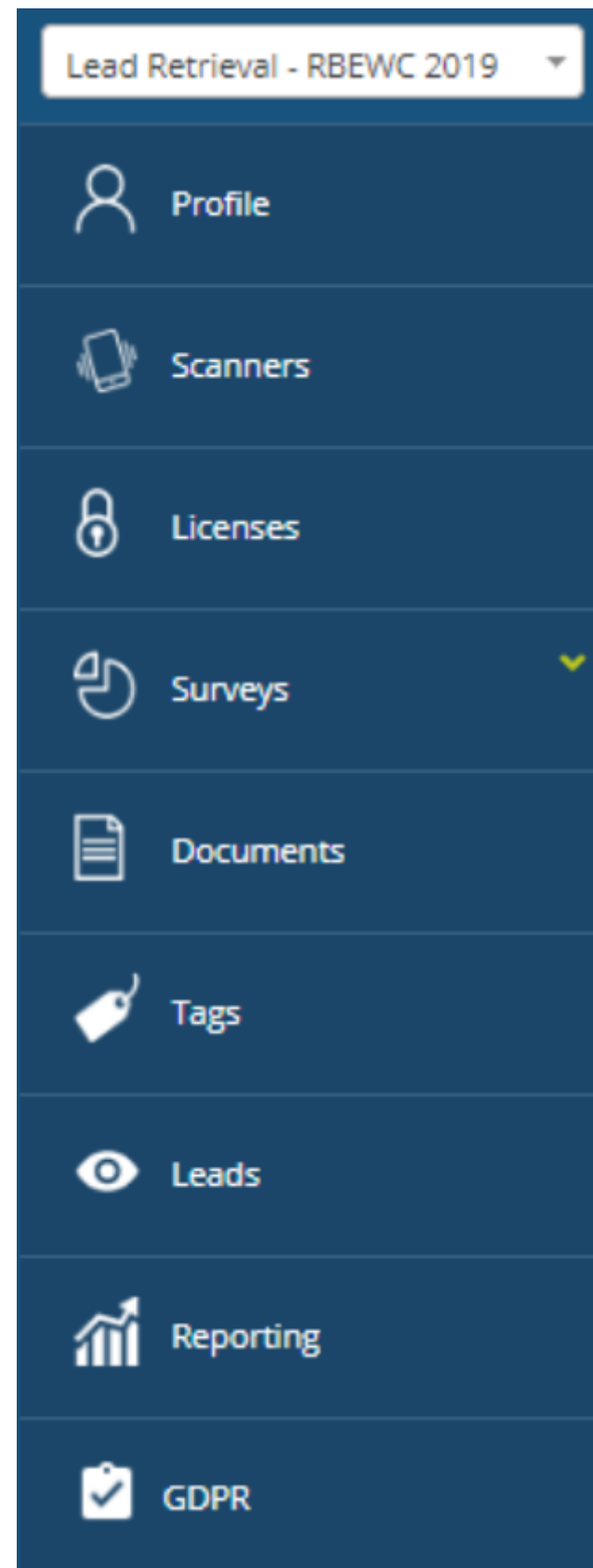
If you don't know who's the administrator of your company's Lead Retrieval account please contact us directly.



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.

II. Web portal



Access to your events/accounts

PROFILE: Change your account information

SCANNERS: List of logged scans

LICENSES: Amount of licenses you have + company code

SURVEYS: Create surveys and configure workgroups

DOCUMENTS: Upload documents

TAGS: Create tags

LEADS: View and download your leads/scans (in real-time)

REPORTING: View reports (in real-time)

GDPR: Create a consent pop-up

III. Configuring the service

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

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

The additional features our service offers are:

**Consent
pop-up**

Surveys

Documents

Tags

III. Configuring the service

i. Consent pop-up

The screenshot shows the 'General Data Protection Regulation Configuration' page in the Leadretrieval interface. The left sidebar contains navigation items: Profile, Scanners, Licenses, Surveys, Documents, Tags, Leads, Reporting, and GDPR (highlighted with an orange box and an orange arrow). The main content area has a title 'General Data Protection Regulation Configuration' and a descriptive paragraph. Below this are three checkboxes for enabling GDPR and forcing visualization after scans, followed by a text area for a description, a URL description field, a URL field, and three checkboxes for marketing consent. Numbered callouts 1-5 point to specific elements: 1 points to the 'Enable GDPR' checkbox, 2 points to the 'Force GDPR visualization after each advanced scan' checkbox, 3 points to the description text area, 4 points to the 'Url description' field, and 5 points to the first marketing consent checkbox.

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

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

Description: I.e.: We would like to inform you of our privacy policy and the process to modify the data that you share with us. Please follow the link below to access our full Privacy policy. If you would like to participate in one of our campaigns please check the relevant checkbox for confirmation.

3

4 Url description: Read our gdpr documentation

Url: I.e.: <https://cloud.google.com/security/gdpr/>

5 ☐ I.e: Yes, I confirm I would like to receive marketing content from this company.

☐

☐

1.Enable GDPR

2.Make GDPR mandatory on Advanced scan and Make GDPR mandatory on Fast scan

3.A small summary/description

4.An URL and its description (the full text of your privacy policy for example) that can be opened in the app

5.Different checkboxes to use depending on your own needs.

[*For more information regarding GDPR please check our GDPR GUIDELINES or contact us directly.](#)

III. Configuring the service

ii. Surveys and workgroups

The screenshot shows the 'Leadretrieval' web application interface. The top navigation bar includes the logo, user profile 'Sarah Parker', and links for 'HELP' and 'LOGOUT'. The left sidebar contains menu items: 'Profile', 'Licenses', 'Surveys' (highlighted with a red box), 'Work groups', 'Documents', 'Tags', 'Leads', 'Reporting', and 'Ask us'. The main content area is titled 'SURVEYS / ADD'. It features a 'Survey Information' section with fields for 'Description *' (Marketing Survey), 'Survey Name *' (Marketing Survey), and a 'Visible' checkbox. Below this is the 'Questions' section, which includes 'Question 1' with a 'Question type*' dropdown set to 'simple choice', and checkboxes for 'Mandatory', 'Visible', and 'Order answers alphabetical'. A blue arrow points from the 'Questions' section to the text on the right.

Simply fill out the questions to create a survey. There are 5 types of questions available (simple choice, multiple choice, small text, long text, date). Save survey to finish creating it.

III. Configuring the service

ii. Surveys and workgroups



Create Work Groups to assign different surveys to different scanners.
A scanner can only be in one Work Group.

Work group name *

Test1| Name of workgroup

Survey *

Choose one Select the desired survey (out of your created surveys)

Survey is mandatory

☐

Make survey as mandatory (will appear first after scanning)

Fast Scan Mode disabled

☐

Disable the mandatory survey on fast scan

Scanners of my company available

Select who will be part of this workgroup

- ☐ [Badge id
- ☐ [Badge id
- ☐ [Badge id
- ☐ [Badge id

Other scanners by badge number

add scanners manually
(with their badge id)

Badge number:

Add

ADD

III. Configuring the service

iii. 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
by Fira de Barcelona

Sarah Parker
Lead Retrieval Fira Barcelona

HELP

LOGOUT

DOCUMENTS

UPLOAD DOCUMENT

ADD DOCUMENT LINK

Show: 10 entries

Search:

Name	File name	Actions
Features	Features analysis.xlsx	
Order Form 2016	Order form 2016.docx	
Sales Catalogue 2016	Sales catalogue 2016.pdf	
Software Documentation	Software documentation.pdf	
Software Documentation	Software documentation.pdf	
Software Presentation 2016	Software presentation 2016.pptx	

Showing 1 to 6 of 6 entries

Previous 1 Next

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

III. Configuring the service

iv. 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
by Fira de Barcelona

Sarah Parker
Lead Retrieval Fira Barcelona

HELP

LOGOUT

Profile

Licenses

Surveys

Documents

Tags

Leads

Reporting

Ask us

NEW TAG

Category name *

Tag name *

NEW TAG

'Category name'

For example: 'Potential client'

AVAILABLE TAGS

Show 10 entries

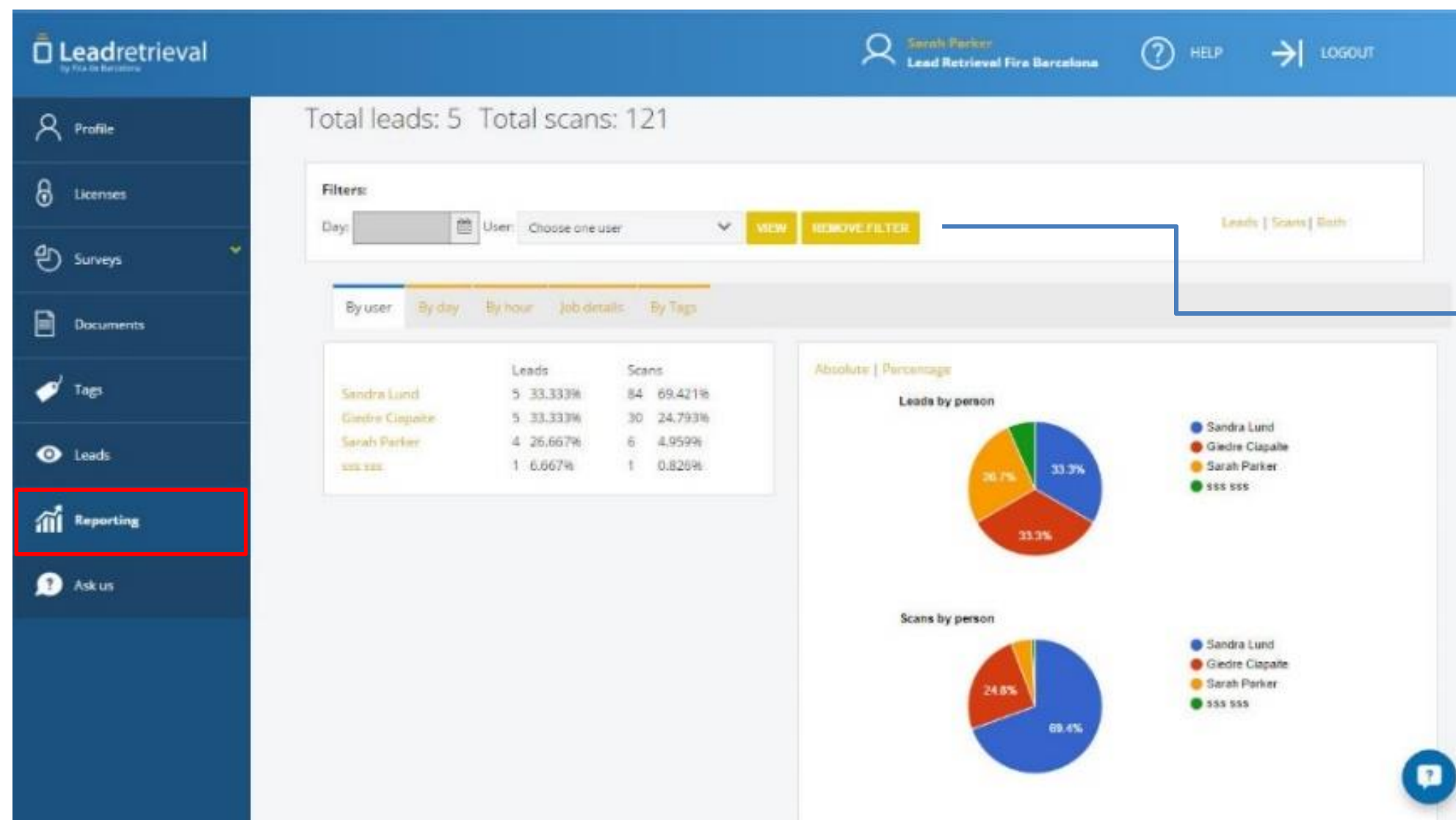
Search:

Category name	Tag name	Actions
FOLLOW UP	CALL TO DISCUSS PURCHASE	
FOLLOW UP	PENDING TO RECEIVE INFO DISCOUNTS	
FOLLOW UP	THINKING ABOUT PURCHASE	
NO INTEREST	NOT INTERESTED IN SOFTWARE	
POTENTIAL CLIENTS	INTERESTED IN DEMO	
POTENTIAL CLIENTS	INTERESTED IN GENERAL INFO	

IV. Reporting

The Web Portal offers leads statistics and reporting with many options and filters. Log onto the Web Portal and go to the Reporting Section.

You have the possibility to see stats such as leads or scans per day, per hour or per scanner user. You can also see stats per Job Details of the leads you have scanned. There's pie charts to the right side for easy interpretation of the data.



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

other manuals

[app manual](#)

[GDPR guidelines](#)

[full user manual](#)

[how to download your data](#)

Contact information

Landing

Find us on the official event's page:
--> </en/lead-retrieval>

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