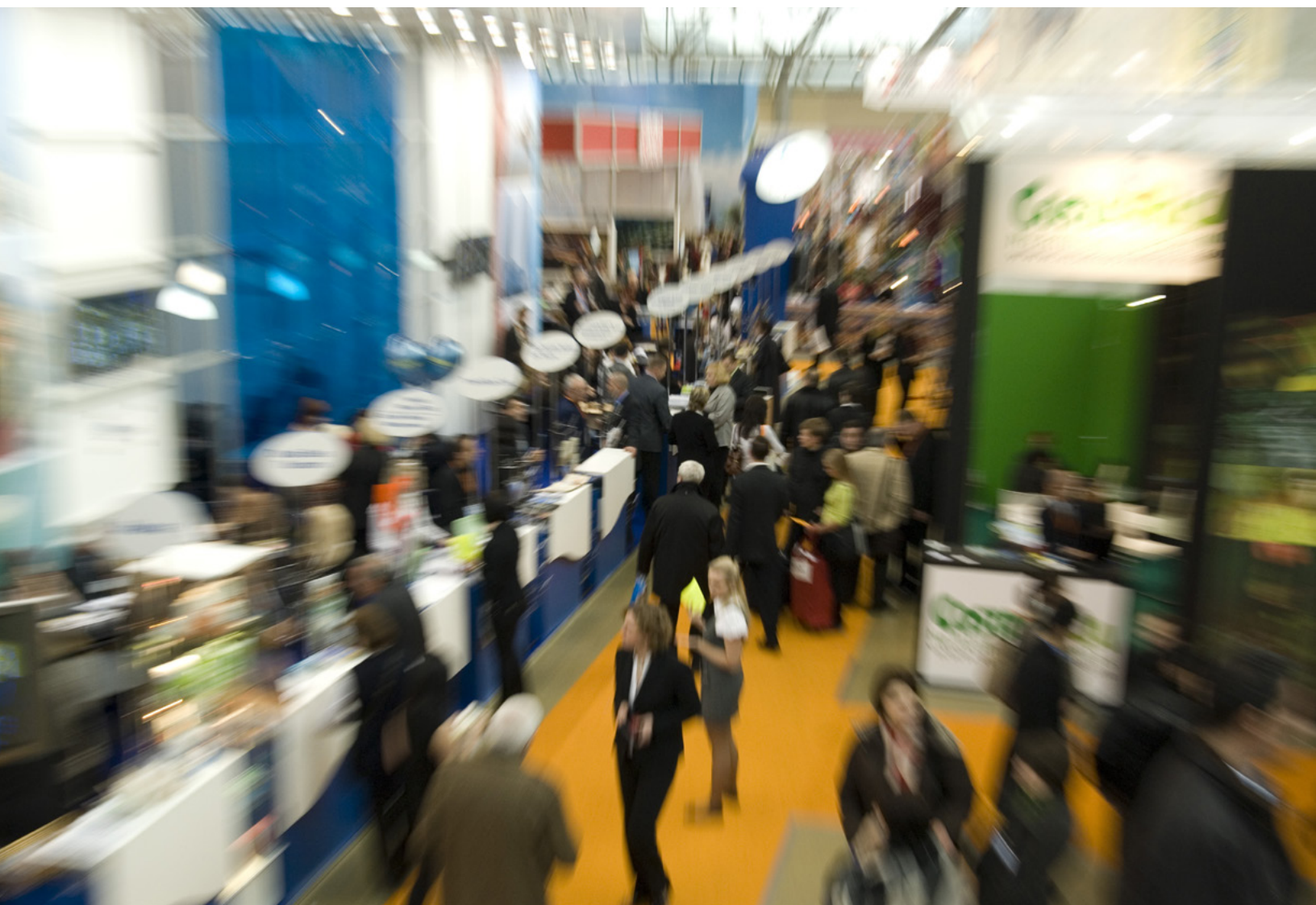


Quick Start Guide



Using the LeadValu Portal

LEADVALU 
REAL LEADS. REAL VALUE.

The LeadValu Portal offers exhibitors the ability to create custom surveys, configure follow-up emails, and browse and download leads directly from the website. You may only create Surveys and Follow-up Emails if you have licensed those options from LeadValu.

Would you prefer that LeadValu set up your Survey or eLiterature email? Email us at support@leadvalu.com for assistance. Survey and eLiterature setup is provided for up to 5 survey questions and 10 eLiterature documents for \$250.

ACCESSING THE PORTAL

Once LeadValu has been licensed for your event, you will receive an email with the portal's URL, username, and password.

NOTE: The username and password are the same for both the app and the portal. Alternatively, you can also login via LeadValu's standard Admin site, <https://www.leadvalu.com/admin>.

BROWSE LEADS

Once you've logged in to the portal, you'll be taken directly to the **'Browse Leads'** page. Here you can scroll through and sort your leads by First Name, Last Name, Company, and Title (if used).

To view the complete listing for a specific lead, click **'View'** located in the far left column. Click **'Download Excel File'** to download leads to an Excel file. Before the event, if you have no leads the Excel file will contain only column headings.

SURVEY

To create a custom survey using your own questions, click **'Survey'** located along the top of the page. Here you can add, change, re-order, and delete questions. It's important to note that you may edit a survey at any time during an event; however, if you delete a question or a response after your leads have been collected, you will lose that data and will not be able to recover it. You may, on the other hand, add, edit, and re-order questions and responses without losing any data.

To Add a New Question: Click *'New Question'* located at the bottom of the page. Under 'Heading' type or paste your question into the blank text line. Example: How many employees do you have?

Each question must have a heading and a selection of answers to choose from. Questions can either have one answer (*'Select One'*) or multiple answers (*'Select Many'*). To establish the appropriate Q&A format, click the arrow on the dropdown box above *'Heading'* and make your selection.

- *'Select One'* utilizes radio-style buttons to select a single selection.
- *'Select Many'* uses checkbox-style buttons to choose any number of answers.

To Add a Selection of Answers: Below *'Heading'* text is *'Answer Text'*. Begin typing or pasting your selection of answers within the blank text line. As you type/paste, additional blank text lines will appear. Each answer must be typed/pasted within its own text line. There is no limit to the number of answers you can provide.

To Re-Order Questions or Answers: Use the up- or down-arrow buttons located above *'Heading'* or within the selection of answers.

To Delete a Question: Click *'X Delete'* to the right of the dropdown box.

To Minimize the Question Window: Click the checkmark on the far right-hand side of the screen. This will collapse the question and close the question's edit mode.

To Edit Existing Questions: Click on the question text to expand it. Edit the question the same as you would create a new question.

IMPORTANT:

- o Be sure to save your work by clicking the *'Save'* button located in the top right-hand side of the screen.
- o While you are not limited to the number of questions in your survey, we recommend limiting the number to 3 or 4, as more than 4 tend not to get responses.

FOLLOWUP EMAIL

To create a custom email, click *'Followup eMail'* located along the top of the page. Here you can create emails tailored to your specific needs and/or event(s), including simple messages thanking attendees for visiting your booth or more complex emails linking attendees to requested documents.

To Get Started: Click *'Setup'* and begin filling in the logistical information (i.e., when the email should be sent, subject line, whether or not you want to include documents within the survey, etc.). It's important to note that the email address used as the *'Reply to email address'* should be valid, as attendees who reply to this address will expect their email to get delivered.

Once you're ready to design your email, click **'Text'** located to the right of **'Setup'**. Here, you can customize your message.

Custom Email

Setup
Text
Docs

Header Bar: Select the color of the header bar in the email. Choose the same color as the background color if you don't want a header bar.

Background: Select the background color. Remember the font color is always black.

Complete the sections below. You do not need to have a logo. Logos will be resized to fit a maximum of 620 by 100 pixels.

Center
Click to set header logo
Remove

Salutation:

Opening Paragraph:

Document intro (included only if documents will be sent):

Closing Paragraph:

Signature:

Header Bar: Select any color of your choice to appear in this area. The bar cannot be removed, but if you select the same color as the background color, the bar will not be seen.

Background: Select the color of your choice as the background color for your email. Keep in mind that the text is always black within the body of the email, so you won't want to make the background too dark.

Logo: Upload your company/event logo as a .pdf, .jpg, or .png file. Logo placement can be set to Left, Center, or Right by clicking on the dropdown box within that area. Logo must be smaller than 620 pixels x 100 pixels or it will be resized. File size cannot exceed 3MB; however, we strongly recommend a much smaller file size of about 100KB or so to improve deliverability.

Salutation: Type or paste a greeting within the blank text box (i.e., "Dear", "Hi", "Hello", etc.). Use the dropdown box to the right to select how the recipient's name should appear (i.e., First Name, Full Name, Attendee, etc.) A comma will automatically be inserted after.

Opening Paragraph: Type or paste your text here.

Document intro: This section will appear ONLY if you've selected *'Add documents to survey'* listed under the previously discussed *'Setup'* tab. Type or paste your text here.

Closing Paragraph: Type or paste your text here.

Signature: Type or paste any signature items you would like here. HTML elements may be used; however, we do not provide support on how to format these elements.

IMPORTANT:

- o Be sure to save your work, by clicking the *'Save'* button located in the top right-hand side of the screen.

FOLLOWUP EMAIL

The screenshot shows the 'Custom Email' interface. At the top right, there are buttons for 'Save', 'Test, no documents', and 'Test, all documents'. Below this is a tabbed interface with 'Setup', 'Text', and 'Docs' tabs. The 'Docs' tab is active. A tip states: 'Tip *Add Document* to add a document. Documents should be in PDF format if possible, XLS, PPT, DOC and RTF are also accepted, but may not be readable by the recipient. Each document you add will be viewable within the App while at the event. Documents are sent as links within the email to reduce size and improve deliverability.' Two documents are listed: 'LeadValue Instructions.pdf' with a description of 'Lead Value Instructions', and 'EXHIBITOR ONSITE NOTICE.pdf' with a description of 'Onsite Notice'. Each document entry has up/down arrows for re-ordering and an 'X' icon for deletion. An 'Add document' button is at the bottom left of the document list.

To add documents to your survey, click *'Docs'* located to the right of *'Text'*. Here, you can add, change, re-order, and delete documents. It's important to note that a number of different document formats are supported; however, we strongly recommend .pdf files, as many recipients may not have the appropriate viewers for other document types.

To Upload Documents: Click *'Add document'* and choose the file (up to 5MB) you'd like to upload. In the *'Description'* text box, type or paste the name of the document as you'd like it to appear on the survey and within the email.

To Re-Order Documents: Use the up-or down-arrow buttons located to the left of the file name.

To Delete a Document: Click *'X Delete'* to the right of the file name.

To Test Email/Documents: Click *'Test, no documents'* or *'Test, all documents'*.

IMPORTANT:

- o Be sure to save your work, by clicking the *'Save'* button located in the top right-hand side of the screen.
- o Emails sent to recipients will contain links to documents. Once the recipient clicks on a document link, the document will then be downloaded. Documents are NOT sent as attachments.
- o All documents are placed in a special question on the 2nd page of the survey (click *'Survey'*, or the notepad icon within the app). To preview a document, click on the actual document name. To select a document to be sent to an attendee, click the checkbox next to the document name.

If you need assistance setting up a custom Survey or Follow-up Email, please contact LeadValu support via email at support@leadvalu.com.

Have a great show!