35th Clinical Applications for Age Management Medicine Conference

October 18-22, 2023 • Marriott Marquis, Houston, TX

LEAD RETRIEVAL
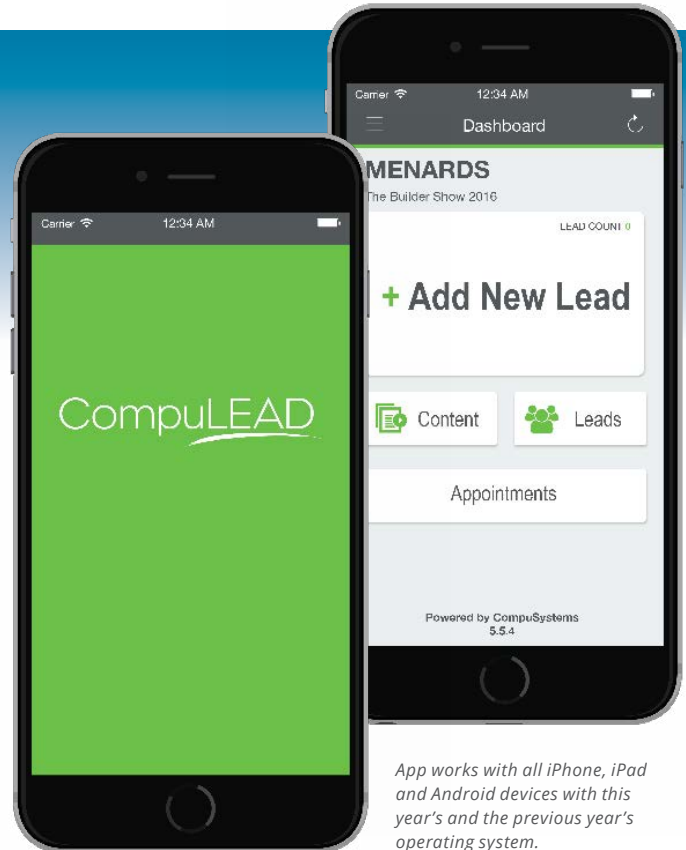# The smart way to collect leads

Show Code: AMMGO23
Advanced Pricing Ends: 9/15/23
Standard Pricing Begins: 9/16/23
Order Online: compusystems.com/order

CompuLEAD *Lead Retrieval App*

- Scan badges on and off the show floor
- Qualify leads with survery questions
- Add notes to leads
- Transfer leads to your CRM for quick follow up

App works with all iPhone, iPad and Android devices with this year's and the previous year's operating system.

Pricing

	9/15/23 ADVANCED ENDS	9/16/23 STANDARD BEGINS
CompuLEAD App *3 User Activation* (173A)	$250	$300
• Download app to your smart phone or tablet to capture leads at your booth or anywhere else		
+ Additional User Activations (173B)	$135	$135
	Processing Fee = $25	

Questions?
Domestic (toll-free): +1.866.600.5323
International: +1.708.786.5565
Email: exhibitor-support@csireg.com

AMMG Age Management Medicine Group

CompuLEAD

CompuSystems

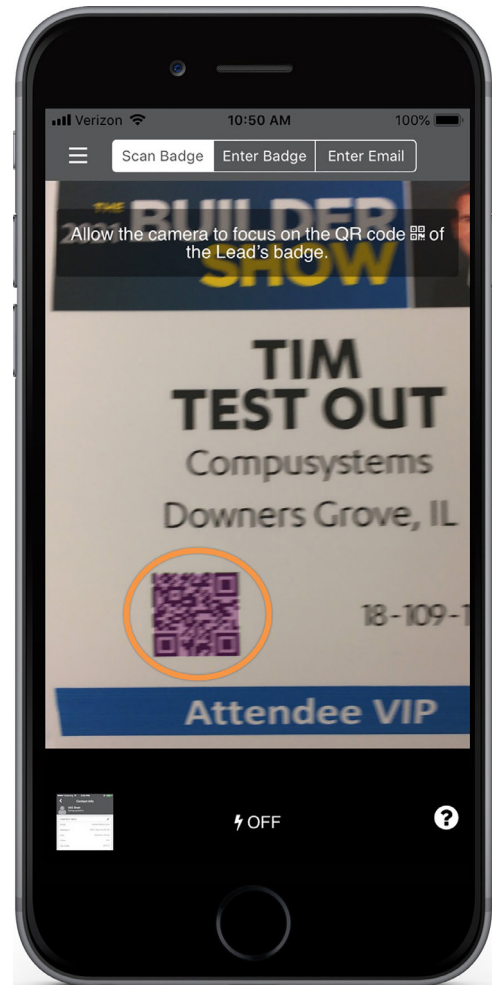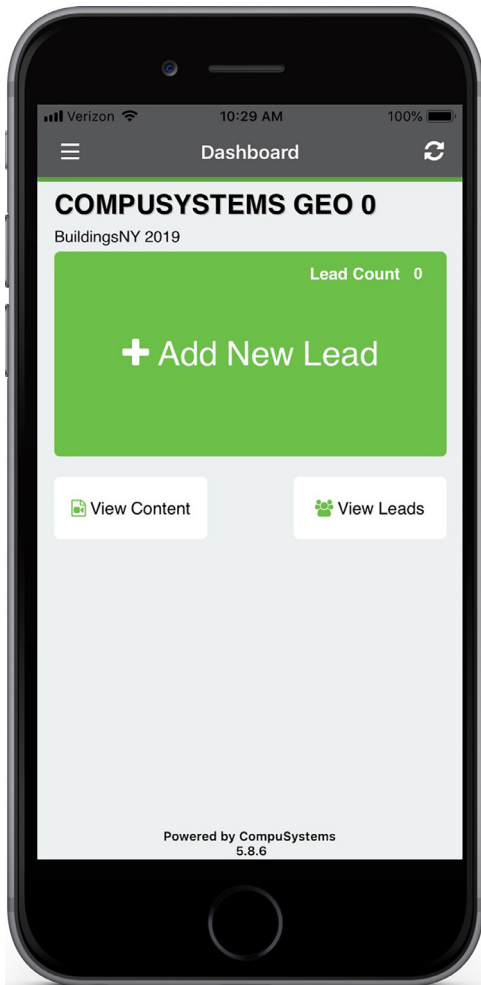# Age Management
AMMG
## Medicine Group

CompuLEAD

USER GUIDE

Installation

- To install CompuLEAD on either your Android or iOS devices, simply navigate to the Google Play or App Store on the devices.

- Search for the lead retrieval app by using the words "CompuLEAD".

- Then select Install for Apple devices or Download for Android devices.

- Once CompuLEAD has successfully installed on the device, scan the badge or enter the username/ password you received in your confirmation email when you purchased CompuLEAD.

- Once the app has been activated, you will be asked to set up your device profile. This includes labeling your device so you know which leads were scanned by which device, if the app is activated on multiple devices. Labeling your device is required, by default the app will be labeled by device number (i.e. Device 1, Device 2, etc...) but you can label your device however you wish (i.e. Mark's Phone). Your device profile can be changed after setup by going to Settings (all preexisting leads will be associated with the new device profile).

- Now, we are ready to scan some attendee badges.

Scanning Attendee Badges

- Scanning attendee badges is quick and easy to do.

- All attendee information you gather will be stored in your own online lead management portal, myLeads.

- You can access myLeads through your exhibitor dashboard or via the link in your email order confirmation.

- If you don't have a Wi-Fi or Internet connection, partial data will be stored until a connection occurs. You can still qualify the leads and add notes.

- To begin, simply select the +Add New Lead button.

- A QR Code reader interface will appear.

- Simply line up the camera with the badge, and make sure the QR Code (highlighted above) can be seen.

- Hold it for a second, and CompuLEAD will capture the attendee's information.

CompuLEAD
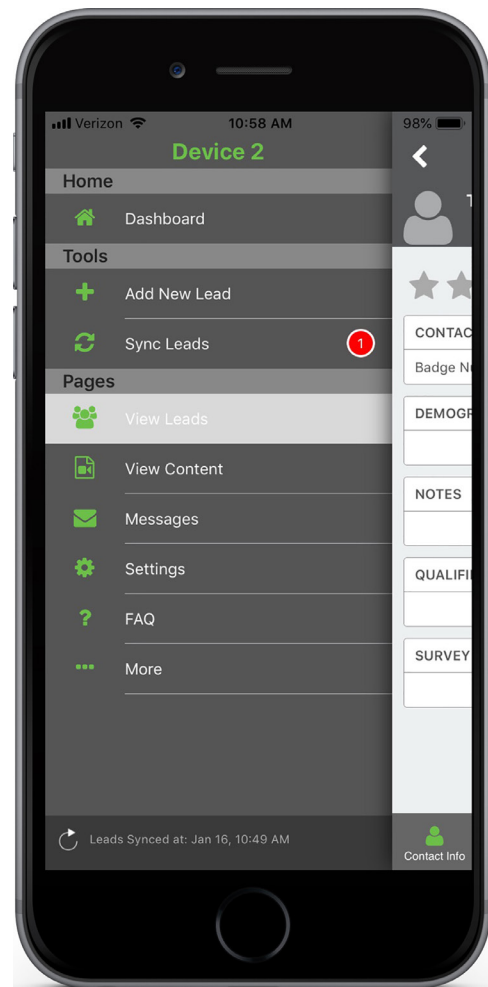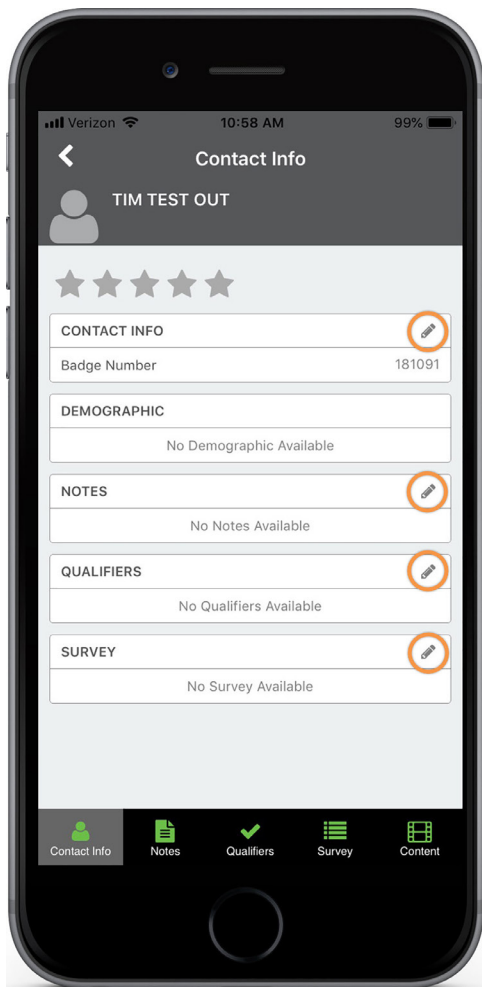
Editing Contact Information

- The information gathered contains the attendee's full registration information.

- If the attendee does not fill out certain categories during their registration, those areas will not display when gathering the lead.

- You can edit and add information (highlighted above).

- To navigate the CompuLEAD app, slide the left-hand navigation out by swiping a finger, from left-to-right, across your phone. You can also access the navigation by clicking the back arrow in the upper left corner of the screen and then clicking the menu bars in the upper left corner.
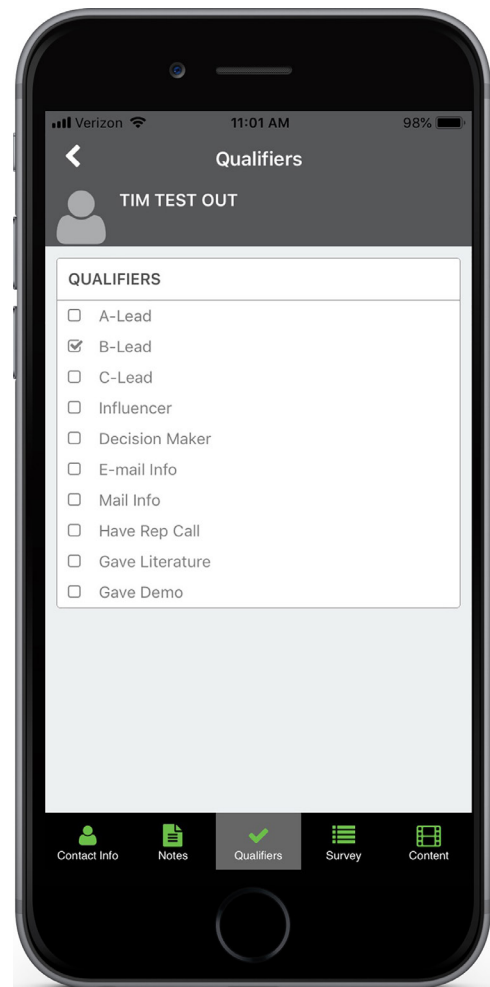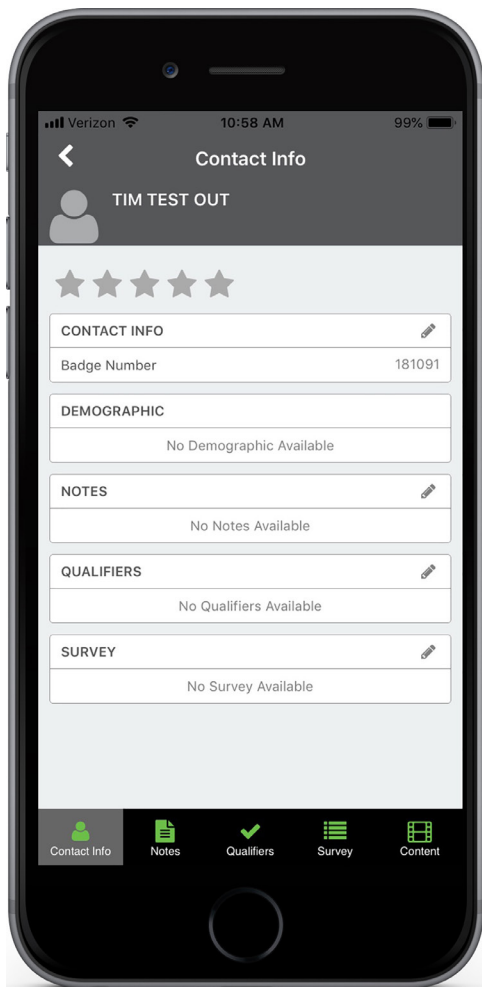
Adding Qualifiers, Surveys & Notes to a Lead

- Once a lead is collected, you can select Qualifiers or Surveys and add Notes to the record.

- Any Custom Qualifiers or Custom Survey questions you provided when you placed your order can be found here.

- To add Qualifiers to a record, select the option in the bottom menu bar.

- Check all applicable boxes.

- You can either select one of the other buttons at the bottom, or click the back arrow in the top left corner. Your selection is automatically saved.
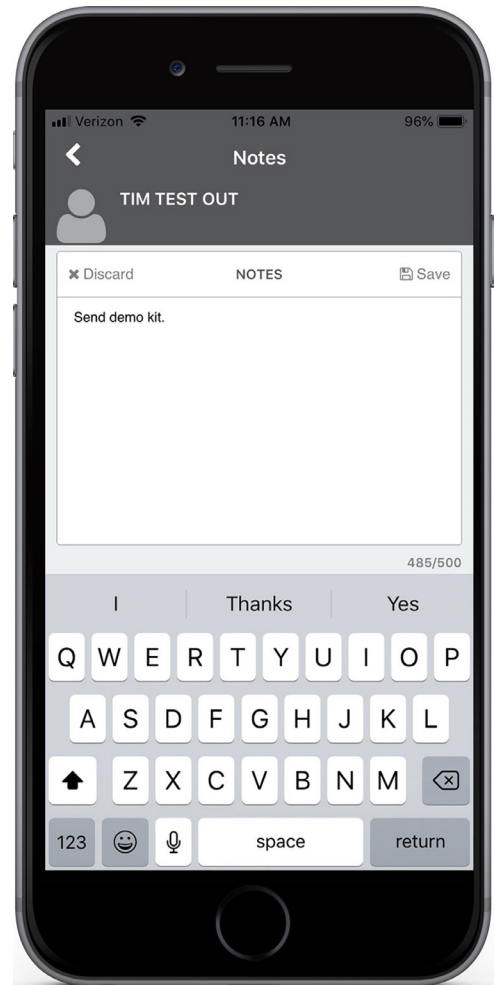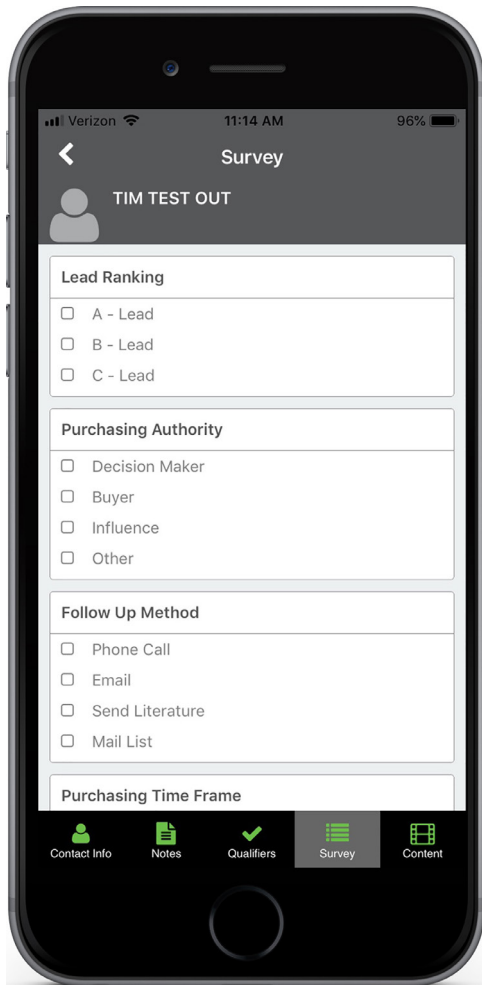
Adding Qualifiers, <u>Surveys</u> & <u>Notes</u> to a Lead

- To add Surveys to a record, select the option in the bottom menu bar (highlighted above).

- Check all applicable boxes.

- You can either select one of the other buttons at the bottom, or click the back arrow in the top left corner. Your selection is automatically saved.

- To add Notes to a record, select the option in the bottom menu bar (highlighted above).

- Once you have added a note, you can either select one of the other buttons at the bottom, or click the back arrow in the top left corner. Your selection is automatically saved.
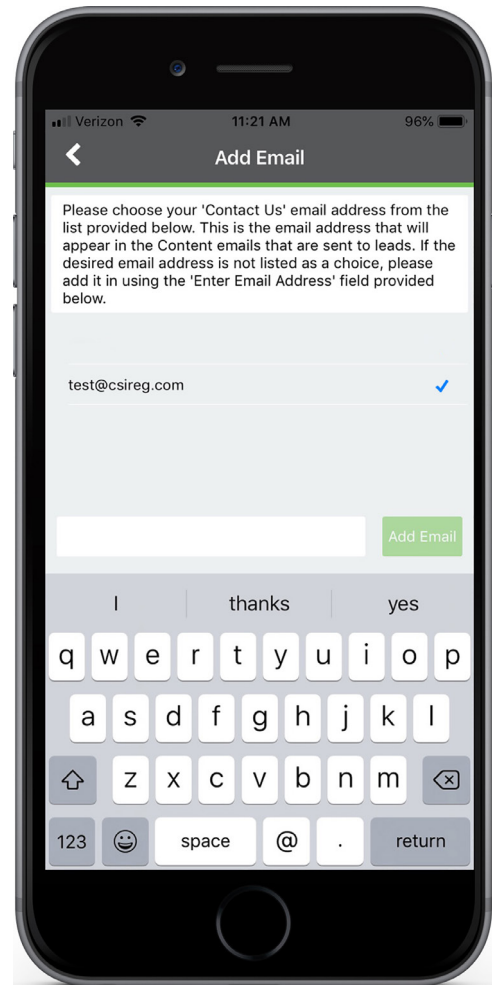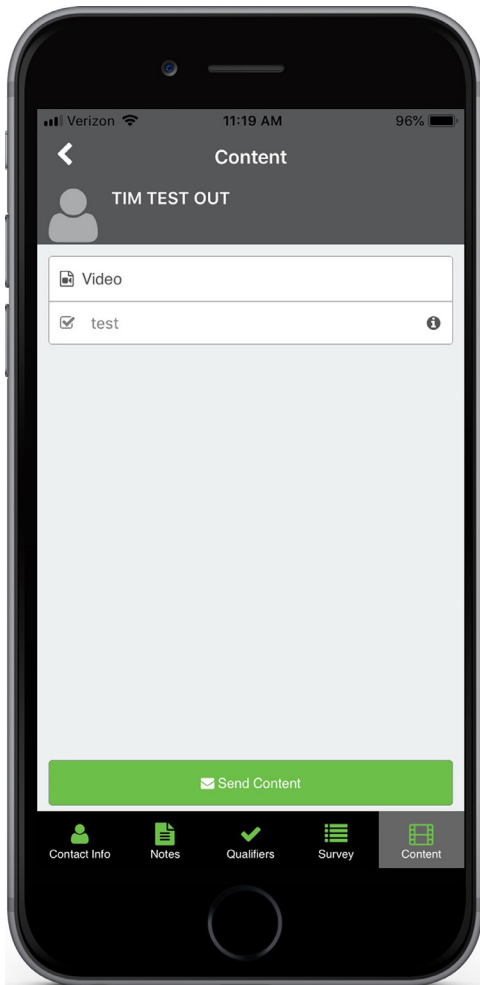
Sending Literature

- During the ordering process for CompuLEAD, you have the ability to add literature to your Exhibitor Profile.

- With CompuLEAD, you can send an attendee a piece of literature pertaining to your company, specific products or other general information.

- Select the Content button at the bottom of the screen.

- Next, select the piece of literature you previously uploaded to your profile.

- If you have more than one piece of literature, you can select multiple to send.

- Once you have selected your literature, click Send Content. The lead's email address and attached literature will be prepopulated into the email.

- Select the email address that you would like to send the content from or type in a new email address at the bottom.

- Once the email address has been selected, the lead's email address and attached literature will be prepopulated into the email.
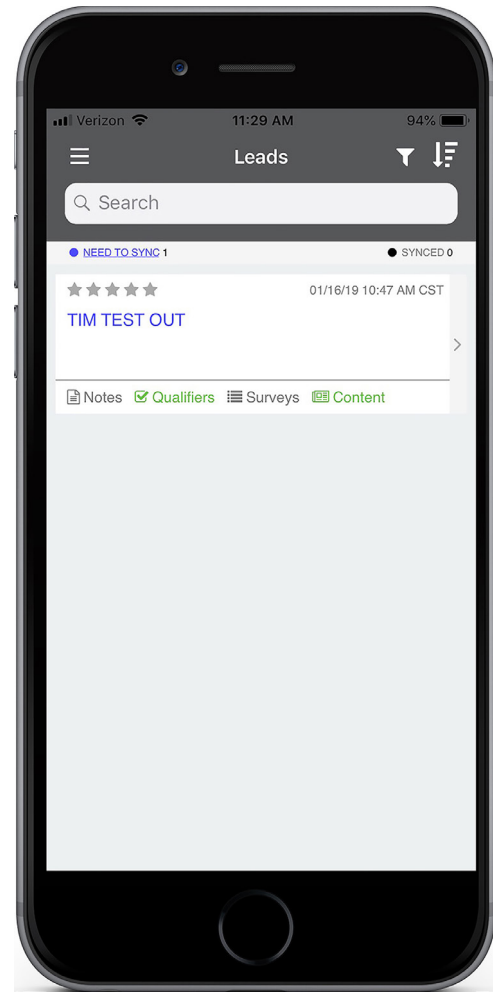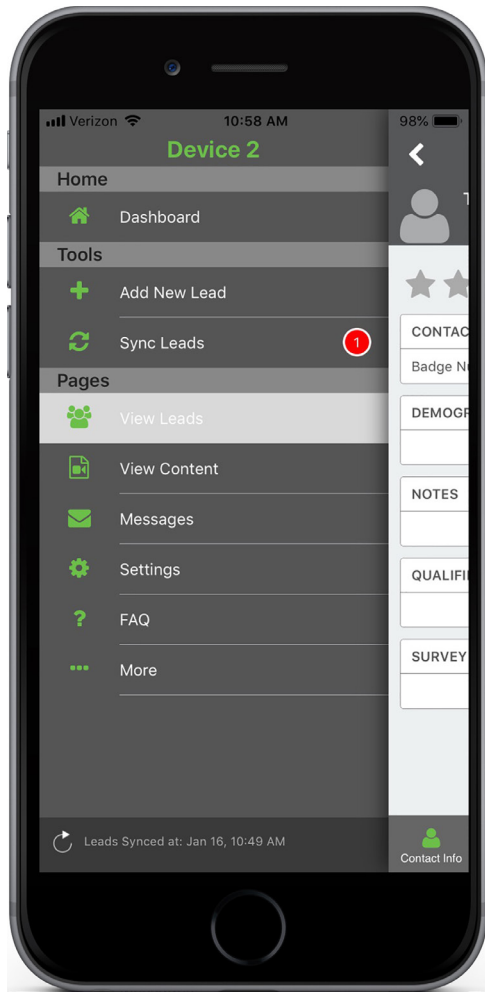
Manage MyLeads

- You can access an attendee's information through your exhibitor dashboard or via the link in your email order confirmation.

- From any screen, slide out the left-hand navigation and select View Leads.

- Leads in blue are gathered while off of Internet connection and simply need to be synced with myLeads.

- Leads in black are synced and properly stored in myLeads for viewing on your smartphone or computer.

CompuLEAD

Test Badges

Once CompuLEAD is activated, you may begin scanning test badges provided on this page.

On the app, select + Add New Lead and then hold your device over the QR Codes on the sample badges. The QR Codes are highlighted above.

Instead of just scanning, you also have the option to add attendee's information by entering their badge numbers into CompuLEAD.

On the app, select + Add New Lead, then press Enter Badge at the top of the screen.

Enter these sample badge numbers to add sample records to your test app.

Sample Badge Numbers:

1100247	1550573	1553703
1547867	1553086	1557359