expopharm 2023

Lead Management

Overview and functions

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DIE LEITMESSE FÜR DEN APOTHEKENMARKT

1. Introduction / Overview

With the new Lead Management, capturing your trade show contacts at your booth is greatly simplified and no longer requires manual maintenance after the event. The person in your company responsible for maintaining the exhibitor profile will also handle the management of the Lead Management system. If you have multiple brand profiles, they must be treated separately, as each brand profile is considered as a separate entity.

The Lead Management administrator has advanced features compared to regular system users. These include adding and deleting Lead Management users, uploading files, and managing areas of interest. Additionally, the administrator can export all the captured leads collected by the Lead Management users.

The application operates in a web browser, which means you will need a device with internet access and an integrated camera, such as a smartphone or tablet. It is also recommended to use an up-to-date browser.

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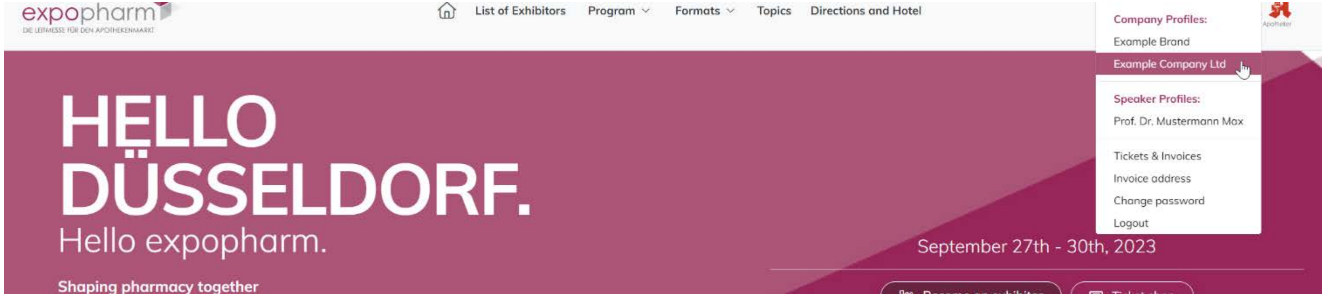
2. Opening Lead Management

To use the service, registration on the website is required. After logging in, you will find a specific menu item for each exhibitor or brand profile in your personal menu. By clicking on this menu item, you can access the management options for the respective company or brand.



After selecting the desired profile, you will be directed to the following view. Click on the "Lead Management" button here.

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3. Lead Management: Overview as Administrator

As an administrator, you have additional controls for setup in the left sidebar, next to the "Scan" section. Please note that these areas are only visible to you as an administrator. Your colleagues who only have scanning permissions cannot access these areas.

The following functions are available to you:

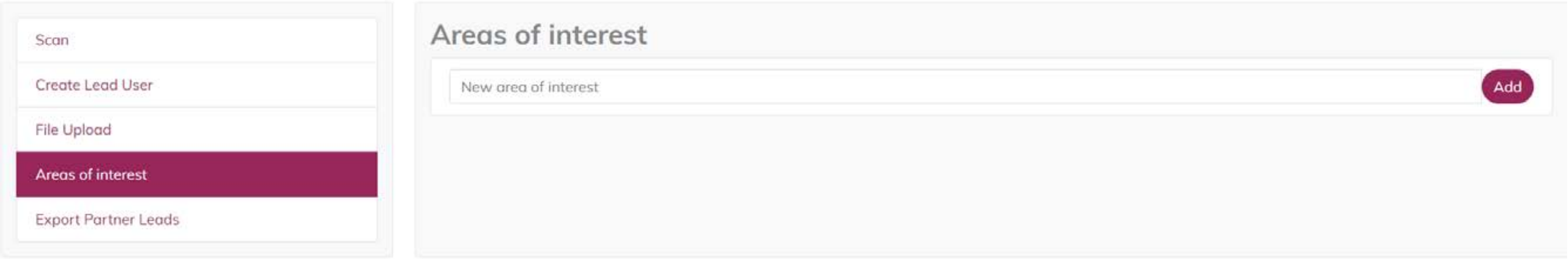
Scan: Please follow the instructions under the section: "Lead Management: Overview as a User" (the view and functionality are identical).

Creating Lead Users: Here you can add your colleagues. Please make sure that the person in question is already registered as a regular user on the website. Then enter the email address used during registration to add all the individuals who should be authorized to use the Lead Management software.

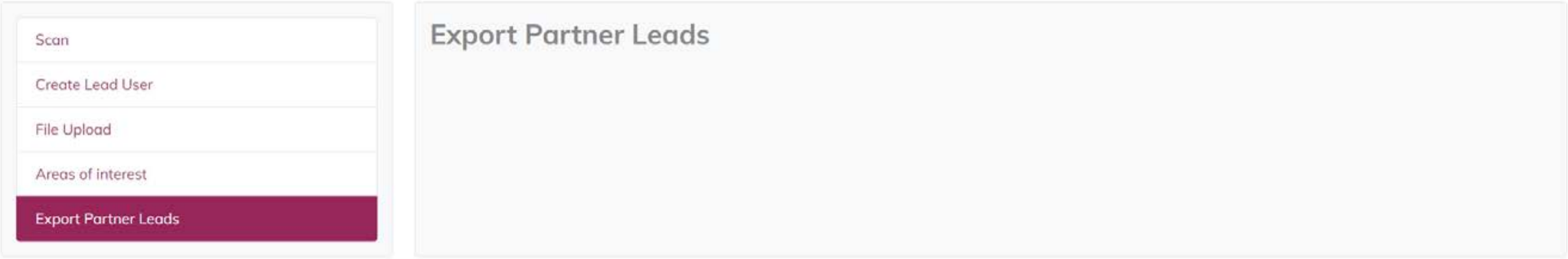
If you have added additional users and wish to remove them, you can do so by clicking on the X symbol. Once a user has been removed, they will no longer have access to the Lead Management.

File Upload: Here you can upload up to 25 files. These files will be available to all users of the Lead Management. This facilitates quick access to selected files that can be associated with the scanned leads. For example, it is recommended to upload current product flyers for your products and services here.

Areas of Interest: In the "Areas of Interest" section, you can add as many entries as you like. These entries will be provided to the Lead Management users as checkboxes. Each added entry creates a checkbox that can be associated with a scanned lead. Activated checkboxes will also be taken into account and included in the later export of the data.



Export Partner Leads: Here you can export all scanned leads in the form of an Excel file.



4. Lead Management: Overview as User

With the green button "Start Scan" or the menu item "Scan" (for administrators), you can scan visitor tickets. After successfully scanning a ticket, you will be automatically redirected to the input form for that lead.

Input form of a scanned lead:

After scanning a lead, an input form for that person will open. In the upper section, you will find personal details such as name, company, and email address. Below that, there are standardized fields that are the same for all exhibitors.

Please note that none of these fields are mandatory. You can fill them out as needed or only use your own fields (areas of interest). When exporting, all selected information will be transferred to corresponding columns in an Excel file.

It is recommended to carefully review the standardized fields in advance and establish a workflow within your team. Determine which fields you want to use and which areas of interest should be created.

In the lower section, you will find the uploaded files (if you are using this feature). If you show one of the files to a scanned lead, it will be automatically marked (the "Shown" checkbox will be activated).

After completing the conversation with the potential lead, you can close the input form by clicking on "Say goodbye and save." You will then be automatically redirected to the scanning screen.

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Start of conversation:	16.06.2023 16:14:23			zurück zum Scanen
with visitor:	Herr Fatih Gürsu von der Firma Avoxa - Mediengruppe Deutscher Apotheker GmbH			
	Salutation:	Herr		
	Title:			
	First name:	Fatih		
	Last name:	Gürsu		
	Company:	Avoxa - Mediengruppe Deutscher Apotheker GmbH		
	Email:	f.guersu@avoxa.de		
Area of interest				
Further Procedure	☐ Send information material	☐ Quotation desired	☐ Arrange conversation	☐ No further procedure
Customer care	☐ General customer care	☐ Current business	☐ Future business	☐ Problem areas, complaints
Customer careEinstufung	☐ Existing customer	☐ Contact	☐ Cooperation partner	☐ Media representative
	☐ Supplier	☐ Applicant	☐ Others	
Areas of interest	☐ Test	☐ Test		
Follow-up of trade fairs by	○ Creator			
	○ Others			
Notes				
Files	open	Test Lorem ipsum ☐ Displayed		
	save and close			

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Explanation of the remaining buttons:

Visitor List: Here you can view all the leads you have scanned and access them again or make changes if needed.

Export: With a single click, you can export and download all the leads you have scanned.

Fullscreen: By activating this option, the software switches to full-screen mode. This hides the website navigation and provides more space for the Lead Management.

Start Scan: Here you initiate the scanning process. Refer to the previous section "Lead Management: Overview as a User" for more information.

5. Notes on data protection

Please note that random scanning of visitors is not allowed. For privacy reasons, it is important that you obtain the consent of visitors before scanning them.

The processing of personal data of visitors, which also includes the scanning or use of personal data or identity documents, is only lawful pursuant to Article 6(1) sentence 1(a) of the General Data Protection Regulation (GDPR) if the visitor(s) have voluntarily given you their express and unambiguous consent to do so.

Within the scope of our obligation to protect personal data, we would therefore like to remind you of the essential provisions of „Art. 6 para. 1 p. 1 lit. a GDPR“:

1. personal data may only be processed with the explicit consent of the persons concerned.

2. clear and comprehensible as well as voluntary consent must be obtained from the person concerned before data is scanned, processed or used.

3. consent may not be made dependent on the performance of a contract or the provision of a service (prohibition of linkage).

4. you shall inform the person concerned about the purpose of the data processing and his or herright to withdraw consent at any time.