Mobile App/Lead Capture Frequently Asked Questions

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Q1: Why am I missing the lead rating and lead notes feature when I scan badges?

A: Try one of these two actions:

1. Click on the lead, then press "Lead Details" (on Android it opens to the lead details screen) to access the rating and notes dialog

2. Make sure that your company's "team" has been claimed in the MY TEAM section of the web app. Only <u>one</u> company staff needs to claim their team; the first staff to claim the team automatically becomes the Admin of this team. Admin status can easily be switched to another team member in the web app. Once this is done, everyone on your team will have the capability to rate leads and add notes, and they can go back and add ratings and notes for people they've already scanned.

Q2: I don't see everyone from my company in the MY TEAM area. How can I add other reps from my company?

A: If additional reps were added to the exhibiting company's staff AFTER the team was claimed they will appear in the MY TEAM portal as requesting to join the team. The team admin can accept them into the team.

Q3: Where can I see everyone that I scanned in my app?

A: On the mobile homepage, you should see "My Scanned List" below the lead capture/badge scan button at the top. This will display all leads scanned in alphabetical order. If internet connection is weak on show site, you may not see all your scans until you have a better connection. Don't worry, all scanned leads will sync back when your internet connection improves.

Q4: How can I be made admin of my company's team?

A: If you were not the first person to log in and claim your team via the **Claim Your Team** button, then the person that claimed admin access can grant you admin access from the Teams console. The only real advantage to being admin is the ability to manage other team members and their meeting calendars.

Q5: Where can I see all of the leads that every person in my company's booth has scanned?

A: Log into your company's Team Portal at https://connect.pizzaexpo.com in a browser and clicking on MY TEAM in the upper right corner. Here, you can view and export all lead contacts your booth has accumulated through badge scans, mutual connection requests and accepted meeting invites. Use the **Contacts** button to view all of your leads; use the **Export** button to export as XLSX or CSV. Exporting will also show data on who performed each scan, and any notes or ratings added to leads. You will only see your own leads on your own device.

Q6: We never claimed our company's team. Can I do this if I've already scanned badges?

A: Yes, Teams can be claimed at any time and need to only be claimed once. All your leads will flow to the portal for export whenever you claim your team.

Q7: Can the MY TEAM portal be accessed from the mobile app?

A: MY TEAM is not natively supported in the mobile app and is best supported on a web browser.

Q8: I don't have a good Internet signal. Will I still be able to get all of my leads?

A: Yes, the scanner works offline and will push your lead data to your MY TEAMS portal when your device is back on a good connection.

Q9: When I export my leads, why don't any of them have physical address info?

A: Currently, our system does not bring in address info. If address info is required, send an email with your lead export file to mobileapp@emeraldx.com post-event and we will run it through our system to add addresses and return to you.

Q10: How long do I have to export my leads?

A: The MY TEAM portal on the web will be available for 30 days post-show. You can export your leads as often as you wish. It is recommended that you do a final export days after the show ends to ensure that all of your team's leads have flowed to the portal for export. Remember to check Team Members to make sure you've accepted everyone on your team so that you get their leads as well.

Q11: How do I add custom lead qualifying questions to ask when I scan badges?

A: In the MY TEAM portal, look for the "Settings" tab. Add questions that require a single response, multi-response or paragraph response. We recommend adding no more than 5 questions. These will flow to all your team members' devices and responses will show up in the qualifier columns of your leads export report. When you scan a badge, select Lead Details, then Edit Qualifications and the questions will appear for you to ask. Make sure to hit save after completing the questions.

Q12: Why do I keep getting an "email not found" error when I try to log in for the first time.

A: Here are possible reasons for this along with ways to resolve:

- You are not registered: ensure that your company's primary contact has completed your staff registration and that you have received a registration confirmation.
- You registered late/onsite: allow time for data to come from our registration system. This should take no longer than 15 minutes.
- You're using a different email to log in than the one used for registration: You can only access the app with the email provided during registration.
- You changed your email in our registration (after registering) or took over someone else's badge ID: head to our Support Desk or email mobileapp@emeraldx.com

Q13: I forgot my password and am trying to reset it. Why haven't I received the reset email?

A: First, check your spam folder. It's also possible that your email system is delaying delivery of emails. To help reset, reach out to our Support Desk or email mobileapp@emeraldx.com

Q14: I can't find my registration/badge ID number to enter the app. Where can I find it?

A: You can find your badge ID in two places:

- In your registration confirmation email
- On your physical badge, next to the QR code

Q15: Badges won't scan and return an error. What could be the problem?

A: This may happen for very recent registrations who have not been in the system for at least 15 minutes and for certain registration types. If the problem persists, reach out to Support Desk or email mobileapp@emeraldx.com

Q16: What can I do if the app won't load on my device?

A: Make sure that your device is running iOS16 or later, or Android 9 or later. Next, make sure you have a good enough connection to the Internet to download the app. If the problem persists, reach out to Support Desk.