

LEADS

USER GUIDE



Ditch the expensive scanning technology and acquire more qualified leads using your smart phone and your customized Zerista event app.

SET-UP

Edit your personal profile and company profile within the desktop website.

DOWNLOAD YOUR EVENT APP

🔍 APP NAME

Search for (Your App Name) in the app store on your iOS or Android device



EVENT APP & WEBSITE

Your event app is your lead scanner & on-the-go address book for the leads you collect at the event.



Add leads either manually or by scanning QR codes.

Toggle between your company/personal profile within the app.

In your company profile, you scan and export leads.

In your personal profile, you can review content/network.

COLLECTING LEADS

Scan an attendee's QR code
Scan the attendee's badge, or ask the attendee to log in to the app and click 'My QR Code.'

Manually add the lead
Enter their contact information by hand.

An attendee adds your company to their contact list
Your company can be added via the app or website.

An attendee scans your company's QR code
Located on your company profile page on the website.

ADDITIONAL FEATURES

Notes

Add notes to each lead you collect. You can add information that is missing from their profile or tips to help you remember your conversation.

Interact

Call, text, email, or message your leads from the Leads app.

EXPORTING LEADS

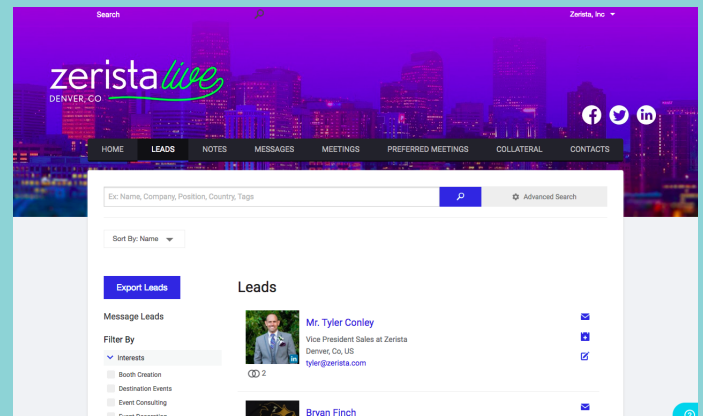
You can export your company's leads from the event website or from the Zerista Leads app on your iOS or Android device.

EXPORT FROM THE EVENT WEBSITE

- Click the 'Leads' tab
- Click the 'Export Leads' button
- You will receive an email with an attached CSV file that includes contact information, notes, and more

EXPORT FROM YOUR iOS OR ANDROID DEVICE

- Tap the share icon at the top of the Leads page



iOS SHARE ICON



ANDROID SHARE ICON

- Scan leads offline and store locally on your device until you connect to Wi-Fi.
- Everyone who has been associated as a company contact can collect leads.
- Each company contact will see the same list of leads.
- Company contacts can add separate notes to the same lead.

