



FairVerify Lead

# Operating instructions

Thank you for deciding to use FairVerify Lead!

This user guide provides step-by-step instructions on how to register with FairVerify Lead, set up the tool according to your wishes and requirements and export the data you have collected.

1. Introduction
2. Setting up your devices
3. Lead scan process on site
4. Setting up leadsheets
5. Evaluating and exporting your leads
6. FAQ
7. Overview web portal

# 1. Introduction

## What devices can I use the app on?

The FairVerify Lead app can be used on any current iOS or Android device.

The only thing you need is a good camera.

## How do I set up my device?

To set up your device, simply download the FairVerify Lead app and generate a one-off QR code from the web portal to verify your device by scanning.

Further information: [2. Setting up your devices.](#)

## How does scanning work on site?

If you want to stay in touch with a visitor after a successful discussion at your stand, you can scan the ticket/badge with your device and the visitor data will be automatically stored in your lead portal.

Please note: Depending on the event, it may not be possible to scan exhibitor passes too.

Further information: [3. Lead scan process on site](#)

## How can I customise my leads?

You can comment on and evaluate every lead.

You can also create an unlimited number of leasheets. These contain questions that you can answer during or following the discussion so that you can document the discussion in more detail.

(For example: Product range – what product does the customer want a quote for? Customer base – is the visitor already a customer?,...)

Further information: [4. Optional: Setting up leasheets.](#)

## How can I export my leads?

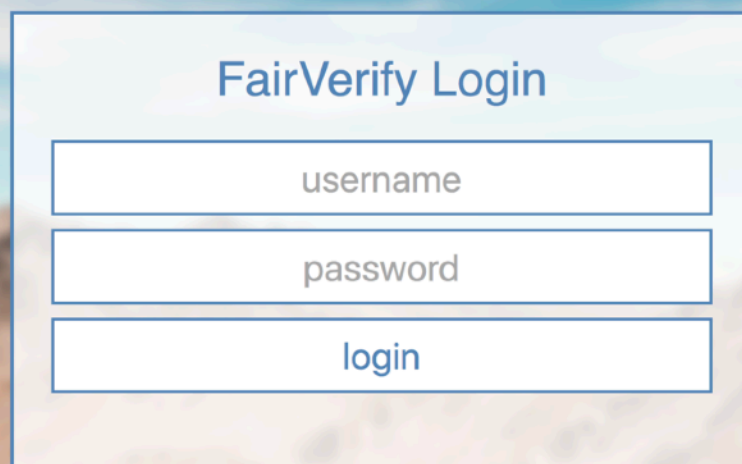
Under the “leads” tab, you can view the leads you have already captured in a table. The listed leads can be exported as XLS, JSON and CSV.

Further information: [„5. Evaluating and exporting your leads“](#)

## 2. Setting up your devices

### Step 1: Login in lead portal

1. Open the lead portal in your browser with the link you have received.
2. Log in to the lead portal with the login data that you have received from your exhibition organiser by e-mail (please check your spam file!).



The image shows a login form titled "FairVerify Login" overlaid on a background of a desert landscape. The form contains three input fields: "username", "password", and "login".

3. Select the relevant exhibition.

Please select a tradefair

**Examplefair Red**

11. – 13.09.2018 - South Entrance, MesseMusterhausen

**Examplefair Green**

29. – 31.02.2020 - Hall 3, ExampleCityExhibitionCenter

**Examplefair Blue**

29. – 31.02.2020, Westeingang ConventionCenterMusterstadt

## Step 2: Registering a device in the lead portal

1. To add a new device, click on "Manage devices".
2. Enter any name you like (e.g. name of colleague) and then click on "Add device".

FairVerify Lead [logout](#) English Deutsch

Example Fairs Ltd. Example Fair Blue

Dashboard Leads Leadsheet **Manage Devices**

**Need hardware for lead capture?**  
 You can rent various devices here: [www.messeorder.de](http://www.messeorder.de)  
 We also have some devices in stock during the fair.  
 Please feel free to contact us at: [tim@max-technik.de](mailto:tim@max-technik.de)


Scan device contingent: **10** Active scan devices: **2**

Device ID:

Device ID	Typ	remove Device
Example IOS	leadapp	<input type="button" value="x"/>
Example Android	leadapp	<input type="button" value="x"/>
Macintosh Firefox(68.0)	web	<input type="button" value="x"/>

**Any problems or questions setting up your devices?**  
 We're here to help. Please feel free to contact us at: [tim@max-technik.de](mailto:tim@max-technik.de)  
 We will also be on site before and during the Exhibition. You will find us at the information desk or exhibition office.

3. A QR code is generated which you will need to verify your device. (Step 3)



Scan this Code with the FairVerify Lead App

You will see all the devices you have added personally on the left under "Scan devices quota", the currently used number of devices on the right under "Active Scan Devices". Any "web-type" devices automatically added are not included in these statistics.

## Step 3: Verifying the device

1. Download and install the FairVerify Lead app from the App Store or the Play Store on the desired device (tablet or smartphone).

You can scan these QR codes to get straight to the app:



iOS

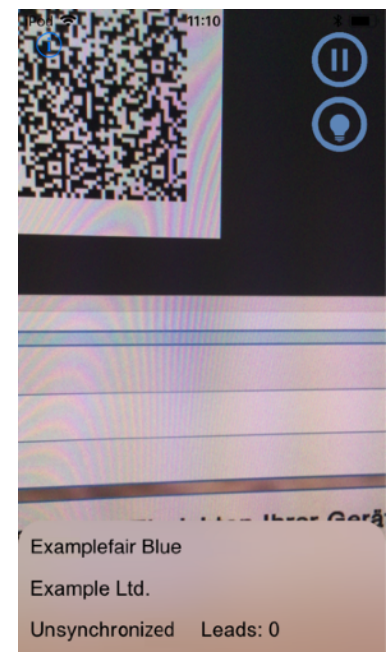
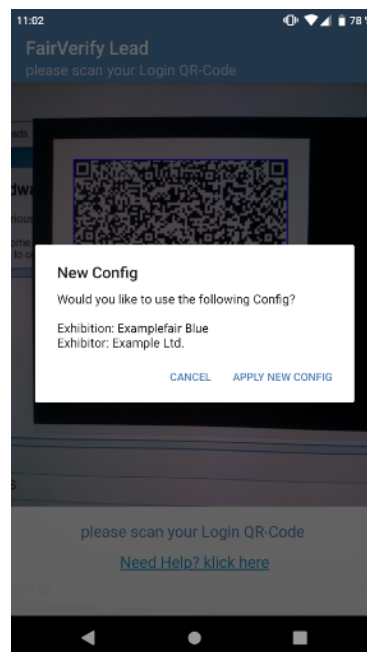
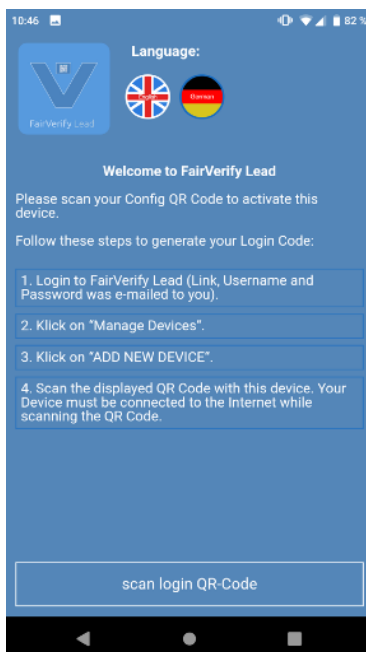


[www.fairVerify.app](http://www.fairVerify.app)



Android

2. Click on "Scan login QR code" and scan the login QR code that appears immediately with the FairVerify Lead app downloaded from the App Store or Play Store. It is not possible to print out or store several QR codes to register later. Please note that the device needs to be connected to the Internet for the verification process.



Your device is ready to use!

# 3. Lead scan process

When registering, visitors of the exhibition enter their data, which is stored on the QR Code (name, e-mail address, position, company address, optional: telephone number, website and more, depending on the event).

If you wish to stay in contact with a visitor after a conversation at your stand, you can scan the QR code to receive the data in your web portal after confirmation of the privacy statement by the visitor.

You can also add comments on the conversation directly in the app and evaluate the discussion.

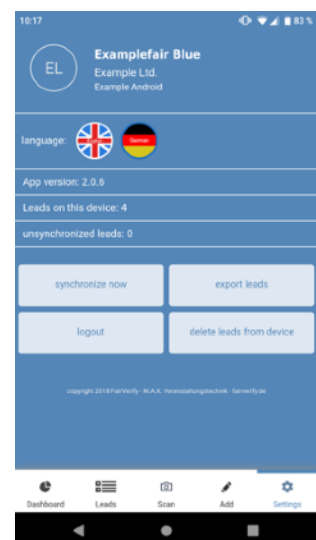
vCards (QR-Codes on business cards for example) can also be scanned with your device.

## Offline use

When your device has been successfully verified, it can also be used without an internet connection.

As soon as you have internet access again, the data will be synchronised and automatically transmitted to your web portal. (Please note: after transfer, the data will be shown in your web portal and not in the app.)

You can also synchronise the leads manually.





# 4. Optional: Setting up leadsheets

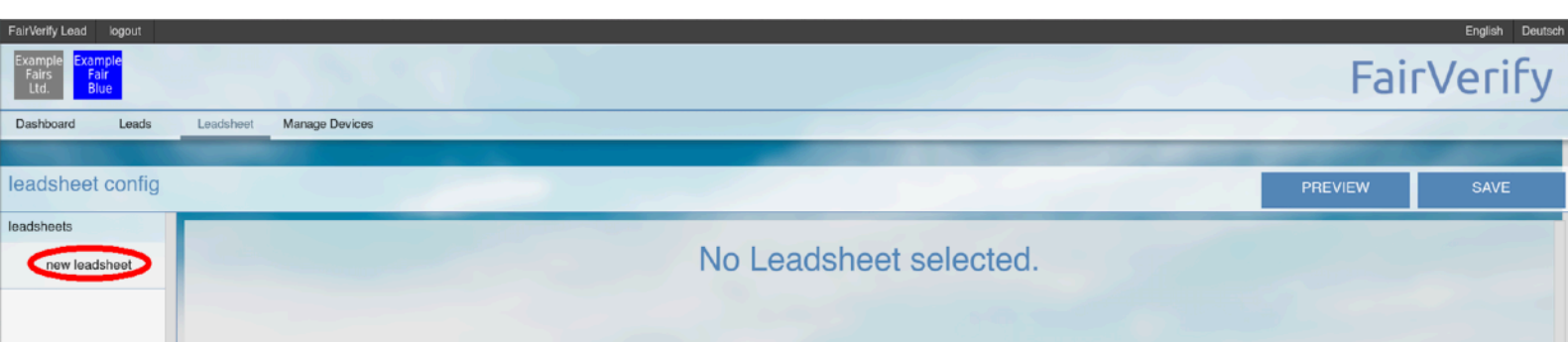
A lead sheet is a conversation guide which helps you record the lead in a systematic and structured manner.

You can create as many leadsheets as you wish and design them according to your individual needs.

You can use your own predefined questions on the leadsheets to document and evaluate the conversations in greater detail.

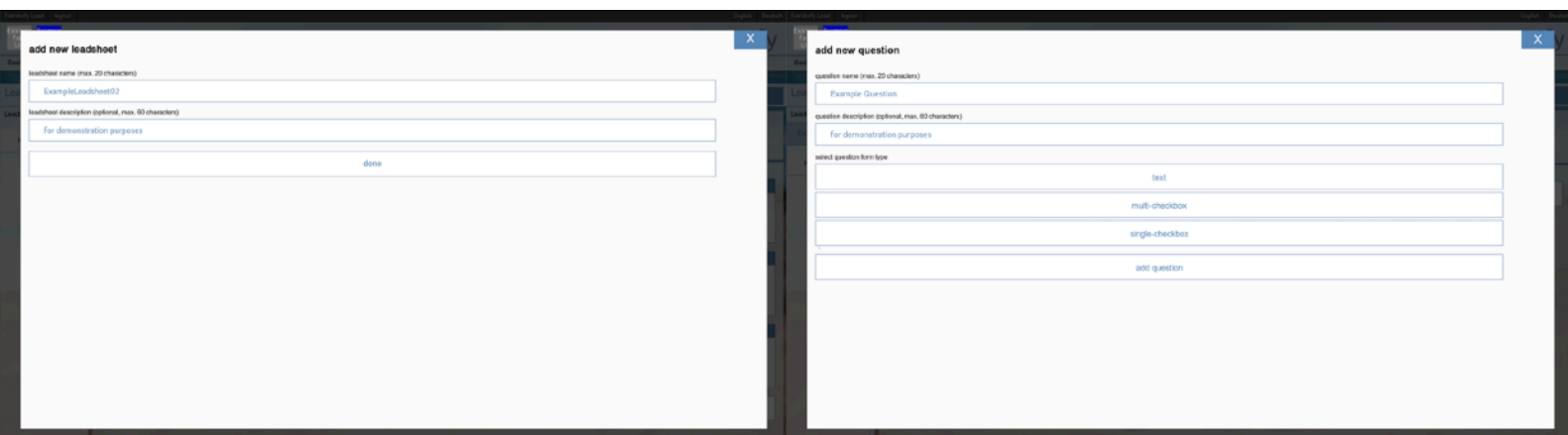
## Creating a new lead sheet

1. Click on "leadsheet" in the menu bar and select "new leadsheet".

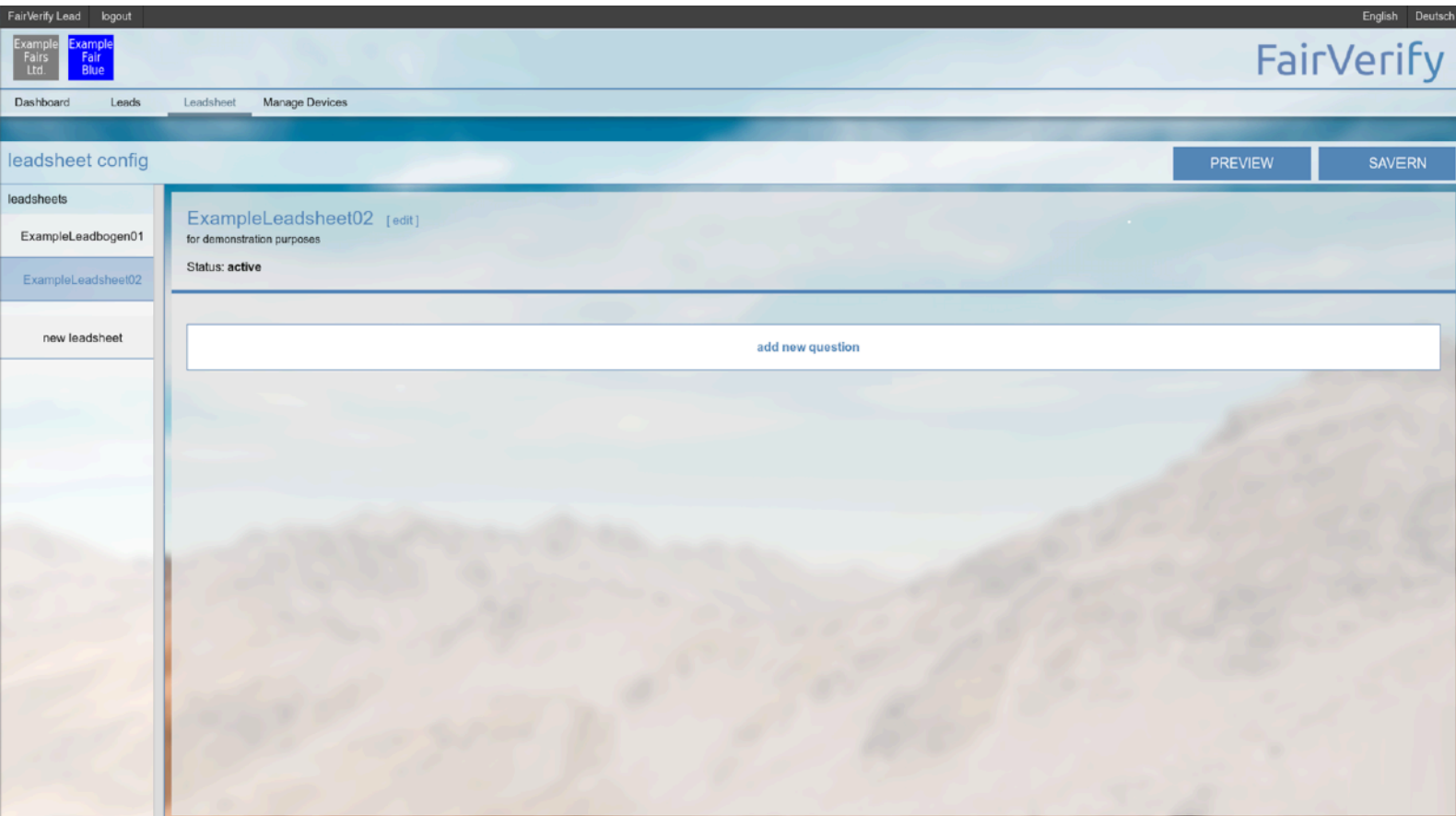


2. Name your lead sheet and, if desired, add a description and click on "Ready" to continue.

3. You can now choose from various types of question.



## Example:



The screenshot shows the 'leadsheet config' page in the FairVerify Lead application. The sidebar on the left contains a 'leadsheets' section with two items: 'ExampleLeadbogen01' and 'ExampleLeadsheet02'. Below this is a 'new leadsheet' button. The main content area is titled 'leadsheet config' and shows 'ExampleLeadsheet02' with an '[edit]' link. Below the title, it says 'for demonstration purposes' and 'Status: active'. A large white box with the text 'add new question' is present. At the top right of the main area, there are two buttons: 'PREVIEW' and 'SAVERN'.

**4. CLICK ON “Save” (top right) to complete the process..**

## Please note:

- It is NOT possible to delete a leadsheet once you have created it, neither can you delete the questions within the leadsheet. However, leadsheets and questions can be marked inactive to not appear in the lead app.
- It is no longer possible to adjust options (single/multiple selection fields) because data integrity needs to be preserved.



# 5. Evaluating and exporting your leads

1. The “Dashboard” tab gives you a graphic illustration of the data you have captured.

This for example gives you the option of comparing the frequency of the 5 most popular departments in the scanned leads, in the form of a bar chart.

There are also pie charts giving you information on job positions, length of comments, the most successful devices and evaluation values.

An overview of all the leads captured can be found at the bottom.



2. Under the “leads” tab, you can view the leads you have already captured in a table. The entries can be limited using various filter parameters (name, position, company, industry sector, town/city). To export the captured data, click on the field “Export current list” top right. You can export the listed entries in three different formats:

- **XLS** (Excel file)
- **CSV** (comma-separated values; suitable for table calculation programmes such as Excel) or
- **JSON** (JavaScript Object Notation; suitable for databases and CRM systems)

If you want to export all the available values, there must be no filter option set. But you can also export “filtered” lists. The export function always exports the list displayed on your device.

For more details on individual leads and to see and edit the answers of the leadsheet, click on the relevant lead.

# FAQ

## My app does not scan. WHY?

You need to have your device verified first before using the app.

Please note that the device needs to be connected to the internet for this purpose.

When the device has been successfully verified, you can use the app offline too.

Further information: "[2.Setting up your devices](#)" und „[3. Lead scan process](#)".

## My app does not display a name. WHY?

Depending on the event, the app may not display the scanned data if the device is not connected to the internet during the scan process. The data has still been saved, however, and can be transferred to the web portal on synchronisation. (Please note: even when synchronisation has occurred, the data will only be shown in the web portal and not in the app)

Further information: "[3. Lead scan process](#)".

## How can I make adjustments to leadsheets later on?

You can add as many questions as you want later on.

It is not possible to delete or edit leadsheet options that have already been created because this could distort the data already collected. However, it is possible to add questions to the leadsheets you have already created later on or mark them as inactive.

You can also edit comments and evaluations in the web portal.

Further information: "[4. Optional: Setting up leadsheets](#)".

## How can I make adjustments to captured leads later on?

It is currently not possible to edit leadsheets and answers in the leadsheets directly in the app. Evaluations and comments can be edited in the portal. Otherwise, all data can be exported and then edited in Excel, for example.

# FAQ

## Why is the number of leads in the Dashboard/Export smaller than the number shown on the device?

A lead is always allocated to the device it was first scanned with and synchronised with the server. This is why the number of leads in the Dashboard/Export on one device may be smaller than that shown on another device.

## Why does my camera only show a black image and not scan?

Make sure you have given the app all the necessary authorisations.

To do so, go to the system settings of your device and select the FairVerify Lead app (possibly under the subheading “apps”). Confirm all the options suggested by the app to get the full set of functions.

Restart the app following these changes. You may have to restart your device too (depending on the manufacturer).

Please note: Tickets/Badges cannot be scanned unless there is an authorisation for camera access.

## Was your question not included above?

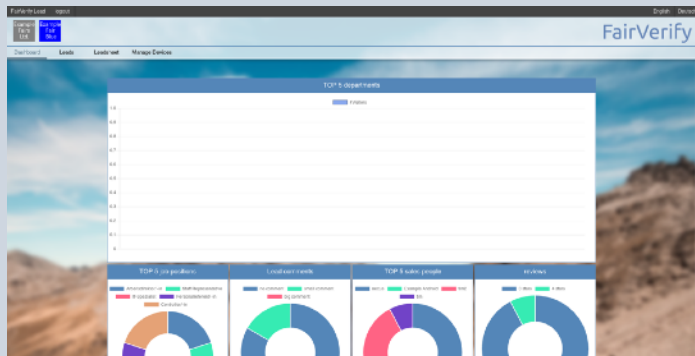
We would be happy to answer your questions:

FairVerify Lead Team

+49 6223 8686 220

lead@fairverify.de

# Overview Web Portal

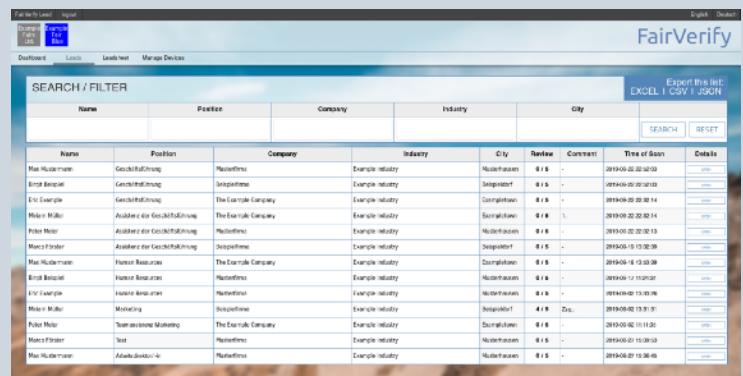


## Dashboard

Evaluate contacts or the sales successes of your colleagues easily and directly (number, quality)

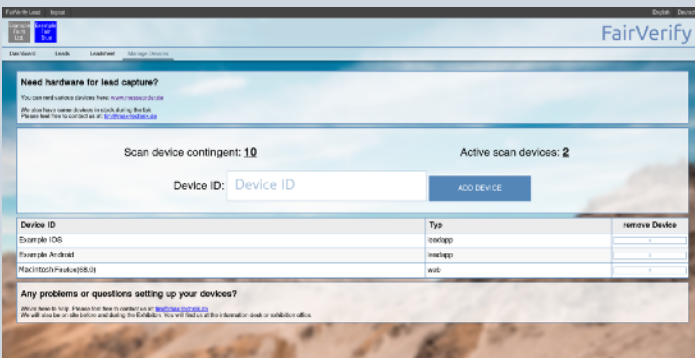
## Leads

Filter and export your leads with contact data, individual evaluation and your comments directly from your lead portal



The table displays a list of leads with the following columns: Name, Position, Company, Industry, City, Review, Comment, Time of Scan, and Details. The table is filtered by 'Name' and 'Position'.

Name	Position	Company	Industry	City	Review	Comment	Time of Scan	Details
Max Mustermann	Geschäftsführung	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details
Ernst Beispiels	Geschäftsführung	Beispiel AG	Example Industry	Berlin	0.5	-	2019-09-02 00:00:00	Details
Eric Example	Geschäftsführung	The Example Company	Example Industry	Frankfurt	0.5	-	2019-09-02 00:00:00	Details
Walter Müller	Abteilungsleiter Geschäftsführung	The Example Company	Example Industry	Frankfurt	0.5	1	2019-09-02 00:00:00	Details
Paula Weber	Abteilungsleiter Geschäftsführung	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details
Walter Müller	Abteilungsleiter Geschäftsführung	Beispiel AG	Example Industry	Berlin	0.5	-	2019-09-02 00:00:00	Details
Max Mustermann	Human Resources	The Example Company	Example Industry	Frankfurt	0.5	-	2019-09-02 00:00:00	Details
Ernst Beispiels	Human Resources	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details
Eric Example	Human Resources	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details
Walter Müller	Marketing	Beispiel AG	Example Industry	Berlin	0.5	2	2019-09-02 00:00:00	Details
Paula Weber	Transaktions Marketing	The Example Company	Example Industry	Frankfurt	0.5	-	2019-09-02 00:00:00	Details
Walter Müller	HR	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details
Max Mustermann	Abteilungsleiter HR	Maximilians	Example Industry	München	0.5	-	2019-09-02 00:00:00	Details



The page displays a list of devices and a form to add a new device.

Scan device contingent: 10 Active scan devices: 2

Device ID:  Device ID

Device ID	Type	remove Device
Example iOS	iOS	<input type="button" value="X"/>
Example Android	Android	<input type="button" value="X"/>
Macintosh (Pro) (OS X)	Mac	<input type="button" value="X"/>

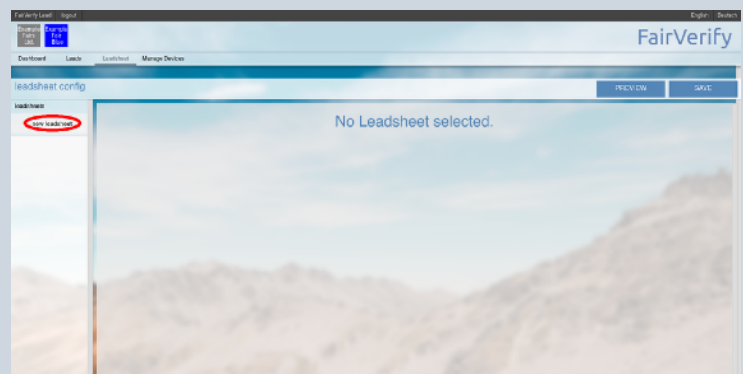
Any problems or questions setting up your devices?  
Please refer to the [FAQ](#) or contact our support team at [support@fairverify.com](#)

## Managing devices

Add IOS or Android devices to easily scan visitor tickets/badges and to document your stand contacts.

## Leadsheets

Customise your lead documentation by creating your own conversation guides.

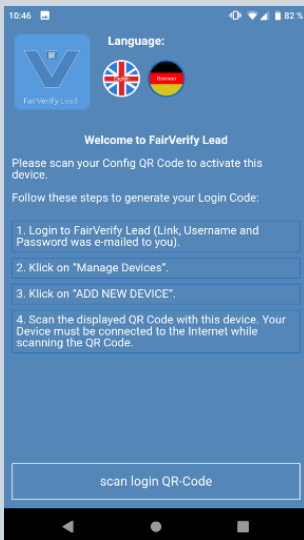


The page displays a list of leadsheets and a form to add a new leadsheet.

leadsheet config

leadsheet:  No Leadsheet selected.

# Overview App



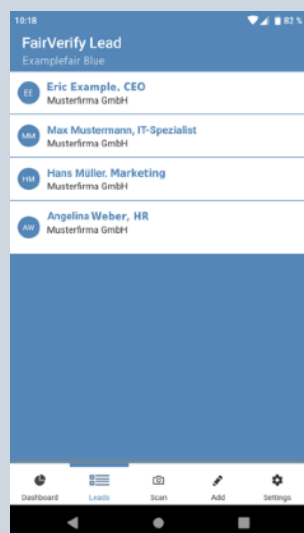
## Home Page (logged out)

Select language  
and brief  
introduction to  
the device



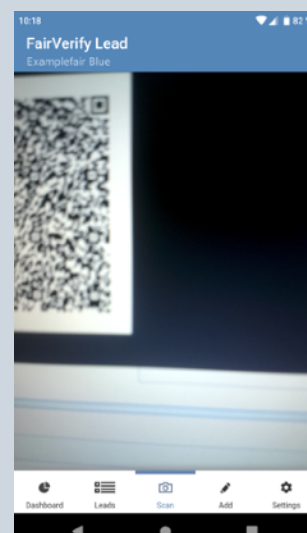
## Dashboard\*

Evaluate contacts or  
the sales successes of  
your colleagues  
easily and directly  
(number, quality) on  
your Android device.



## Leads\*

All your leads at a  
glance, directly on  
your device



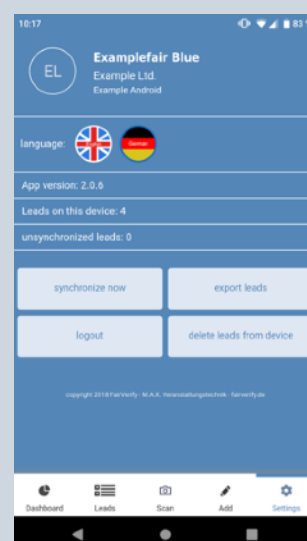
## Scan

Simply scan your stand  
contacts and receive all  
the visitor information  
directly to your device.



## New\*

Create leads manually  
(if a visitor does not  
have his/her ticket/  
badge to hand) and  
have them displayed  
automatically in your  
web portal.



## Settings

Choose your language  
and get an overview  
of your app

\*currently only available on  
Android