Exhibitor Management System
User Guide

Utilizing the SDMS Lead Retrieval System

This user guide exists to guide SDMS members and non-members to successfully use the SDMS Lead Retrieval System at the *SDMS Annual Conference* through the SDMS Exhibitor Management System.

Accessing the Lead Scanner

All booth personnel from the company/organization can access the SDMS Lead Retrieval System, and capture attendee data. All attendee data will be stored together in one location, even if captured from different individuals. There are two different ways to access the Lead Retrieval System:

1. Visit www.sdms.org/leads/scan
2. Open the SDMS Annual Conference Exhibit Booth Personnel Confirmation email.

Alyssa,

You have been registered as an exhibit booth personnel for the *2022 SDMS Annual Conference*.

Use the QR code below to check-in and print your badge at the registration desk.

If you have any questions, contact events@sdms.org.

Access your exhibitor services
SDMS Lead Retrieval System

Additionally, your company purchased access to the SDMS Lead Retrieval System. Click the link above to access the Lead Retrieval System from your device.

Once you access the link, you will be prompted to enter your full name and the password. The password to access your company/organization's lead service was provided to you in a separate email from SDMS Events. **The password is the same for everyone in your company/organization**.
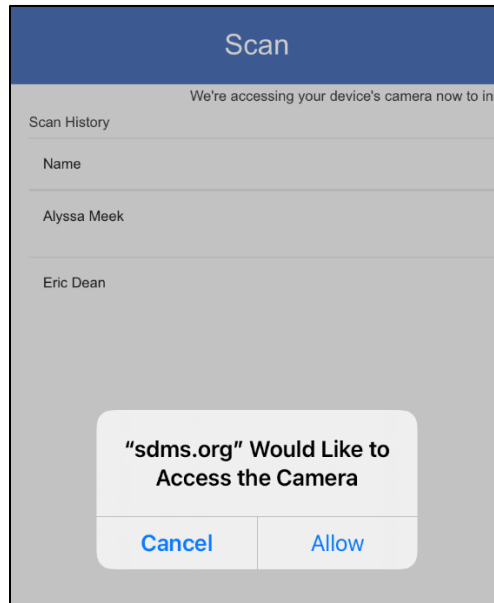
Scanning Attendee Badges

Once you are logged in, the system will request access to your device's camera, grant the system access to begin scanning the QR code provided on the attendee badge to capture their information.
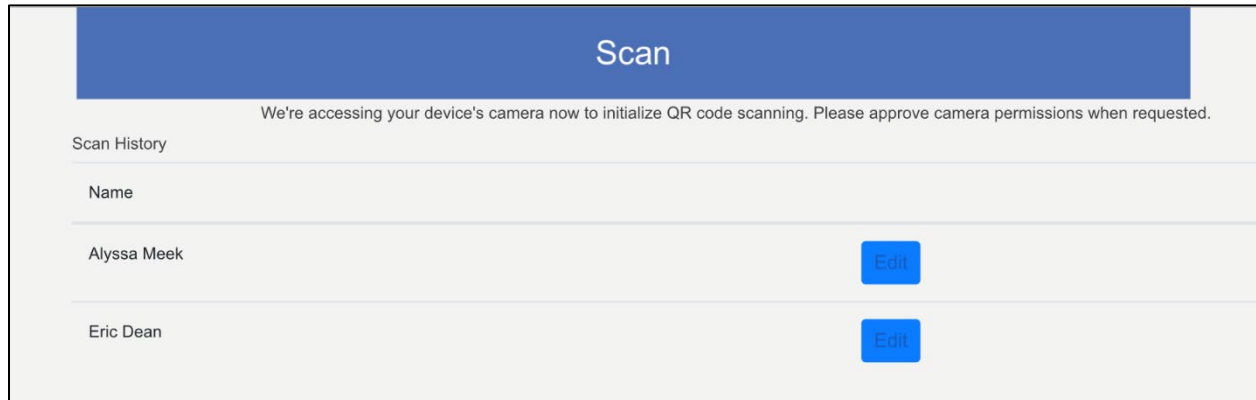

Scan the attendee badge. Once scanned, the attendee name will appear with a form for you to complete for that attendee, including a quick interest box and a notes section.

NOTE: attendees may have opted out of sharing their email address and/or phone number with you. However, if they give verbal permission, you may enter their contact information into the notes field.

After scanning and completing the required fields, **SAVE THE LEAD.** The attendee will now appear in your captured leads.

Email Your Captured Leads
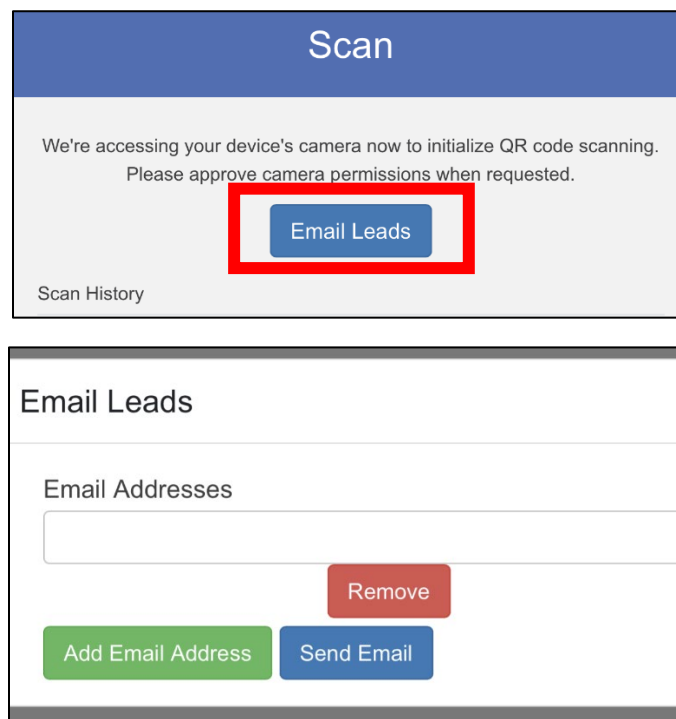
You can email your captured leads to any email address at any time through the **Email Leads** button. An email will be sent with a CSV file of all captured leads.
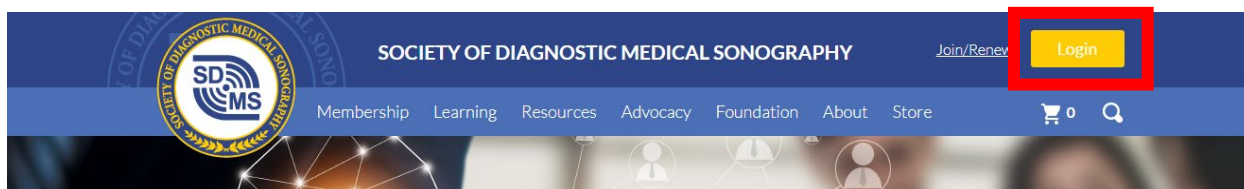
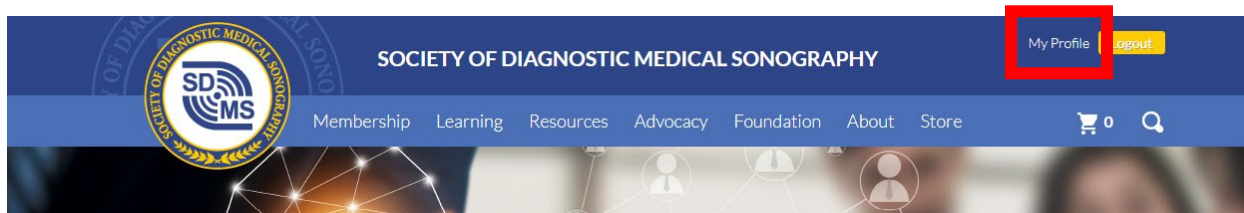# Accessing Your Captured Leads – Outside of the System

The SDMS Lead Retrieval System exists within the SDMS Exhibitor Management System listed on the Organization profile. The Primary Contact or Exhibits Manager for the organization will have access to view/download captured leads. Follow these steps to access your organization profile.
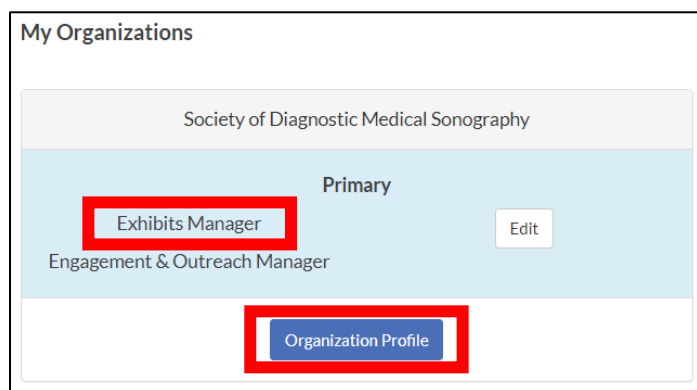
Step One: Login to SDMS.org

Note: if you currently do not have login credentials, contact events@sdms.org.

Step Two: Click "My Profile"

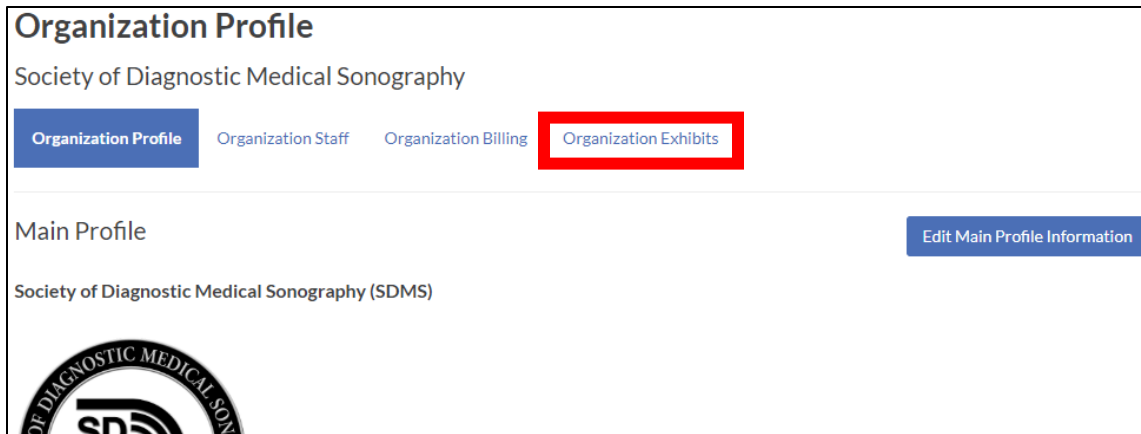## Step Three: Scroll and Navigate to "My Organizations"

To purchase/manage exhibit booths on behalf of your organization, you will have to be listed as the **Exhibits Manager**, **Primary** or **Billing Contact**. If you do not have one of these options listed, please contact events@sdms.org.
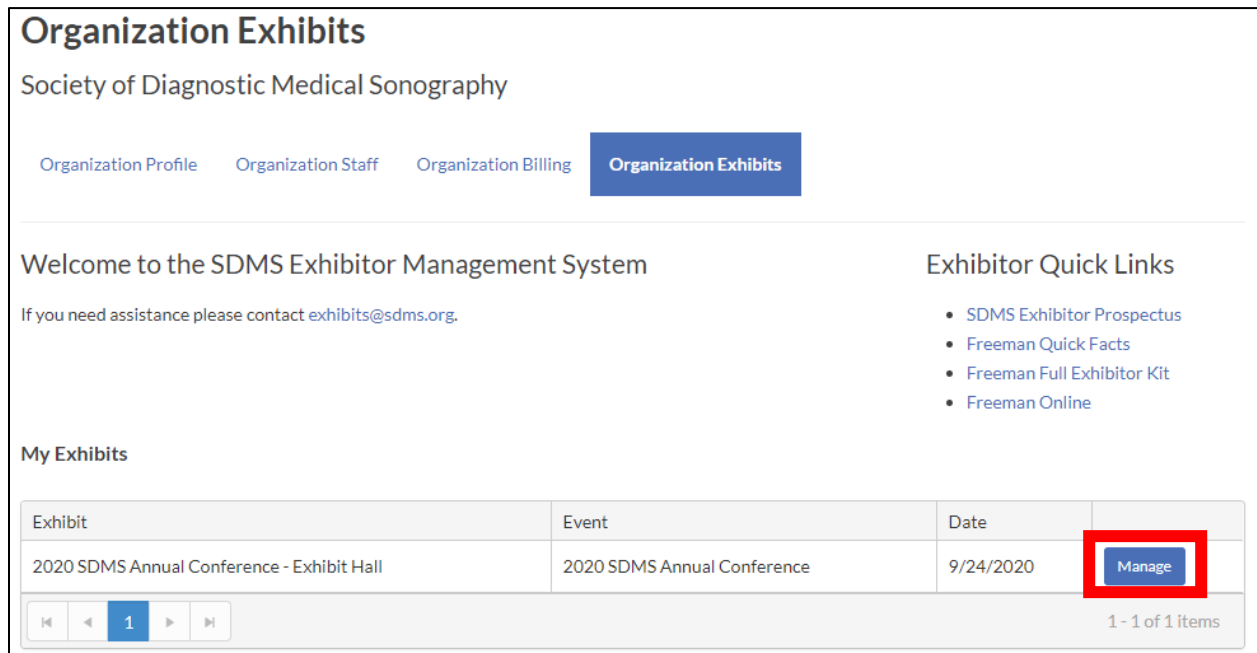
Click **Organization Profile**.

Step Four: Access Organization Exhibits

Navigate to the **Organization Exhibits** tab to access the SDMS Lead Retrieval System.

You should see your exhibit purchase under the **My Exhibits** section. Click **Manage** to access your purchase.

Step Five: Navigate to the Leads Section

Under the Leads section, you should see a list of all the captured leads collected onsite at the SDMS Annual Conference. To download a spreadsheet of all captured leads, click on the **Download All Leads** button.

Leads							Launch Scanner (Requires a camera)	Download All Leads
First Name	Last Name	City	State	Interests		Email Address	Phone Number	Notes
Eric	Dean	Plano	TX	Interested in Products/Services, Schedule a Demo				This is a test note
◄ ◄ **1** ► ►◄								1 - 1 of 1 items