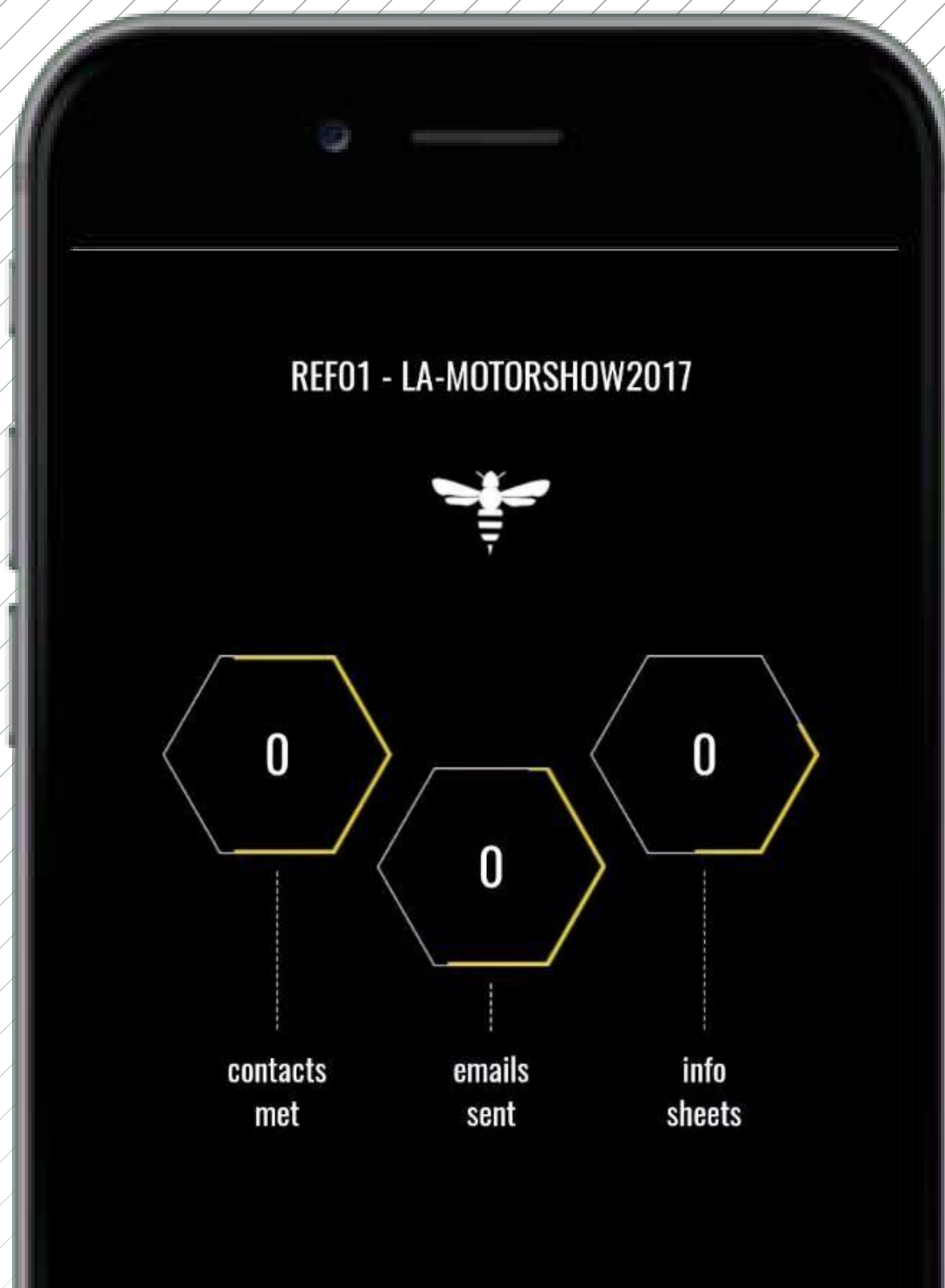




boabee

lead retrieval app



manual

v17.01
Fielddrive bvba

in this manual you'll find ...

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Intro: What is **boabee**?

Boabee is a lead retrieval app that will help you to improve the way you gather lead information at your booth. The app allows you to go through 3 simple steps for each interesting lead you meet.

Scan the visitor's badge

All known information will pop up on your device and can be edited.



Qualify the lead ...

with the default options or your own set of lead questions.



Share information

Select brochures, files and weblinks and send them straight to the visitor.



2 ways to use boabee

You can use boabee in different ways, depending on your needs and the preparations you are willing to take.

1. zero effort, the easy way

The "zero effort" approach means that you can start working with boabee without any preparation. You will be able to scan visitor badges and to qualify leads with a set of standard questions.

- 1 before the fair: [install the application](#)**
Go to the Apple AppStore or Android Play Store
Search for *boabee* or *boabee 2* and install the app
Log in with your credentials, and select the app setup for your event
- 2 at the fair: [gather leads](#)**
For each potential lead: scan the badge, complete the contact details if necessary, and qualify the lead with the standard questions.
- 3 during the fair: [report via mail](#)**
Every morning after a fair date the team-report will be sent to the responsible. This report contains all the gathered information of all fair days.
- 4 3 days after the fair: [final report via mail](#)**
3 days after the fair a last final version of the report is sent to the responsible.

2. "go pro" and use all features

With a bit of extra effort you can "Go pro" and use the full potential of boabee. Follow the preparation steps to optimize the way boabee can serve you at the fair: qualify leads with your own lead questions, and select documentation, weblinks, social media channels and more to share instantly with your visitors.

1 before the fair: prepare your boabee

1

Create a set of questions that are relevant for your sales trajectory after the fair. Try to limit the number of questions for the efficiency. Where possible define selection lists.

Gather all the information you would like to provide to your visitors: brochures, price lists, links to your website, youtube movies, links to your social media, etc. Preferable format for files is pdf.

Log into the boabee dashboard to configure your questions, to upload your documentation and links, and to select an appropriate email template.

Go to the Apple AppStore or Android Play Store. Search for *boabee* or *boabee 2* and install the app. Log in with your credentials, and select the app setup for your event.

2 at the fair: gather leads

2

For each potential lead: scan the badge, complete the contact details if necessary, qualify the lead with your own questions, and select the info to share instantly.

3 during the fair: report via mail

3

Every morning after a fair day the team-report will be sent to the responsible. This report contains all the gathered information of all fair days.

4 3 days after the fair: final report via mail

4

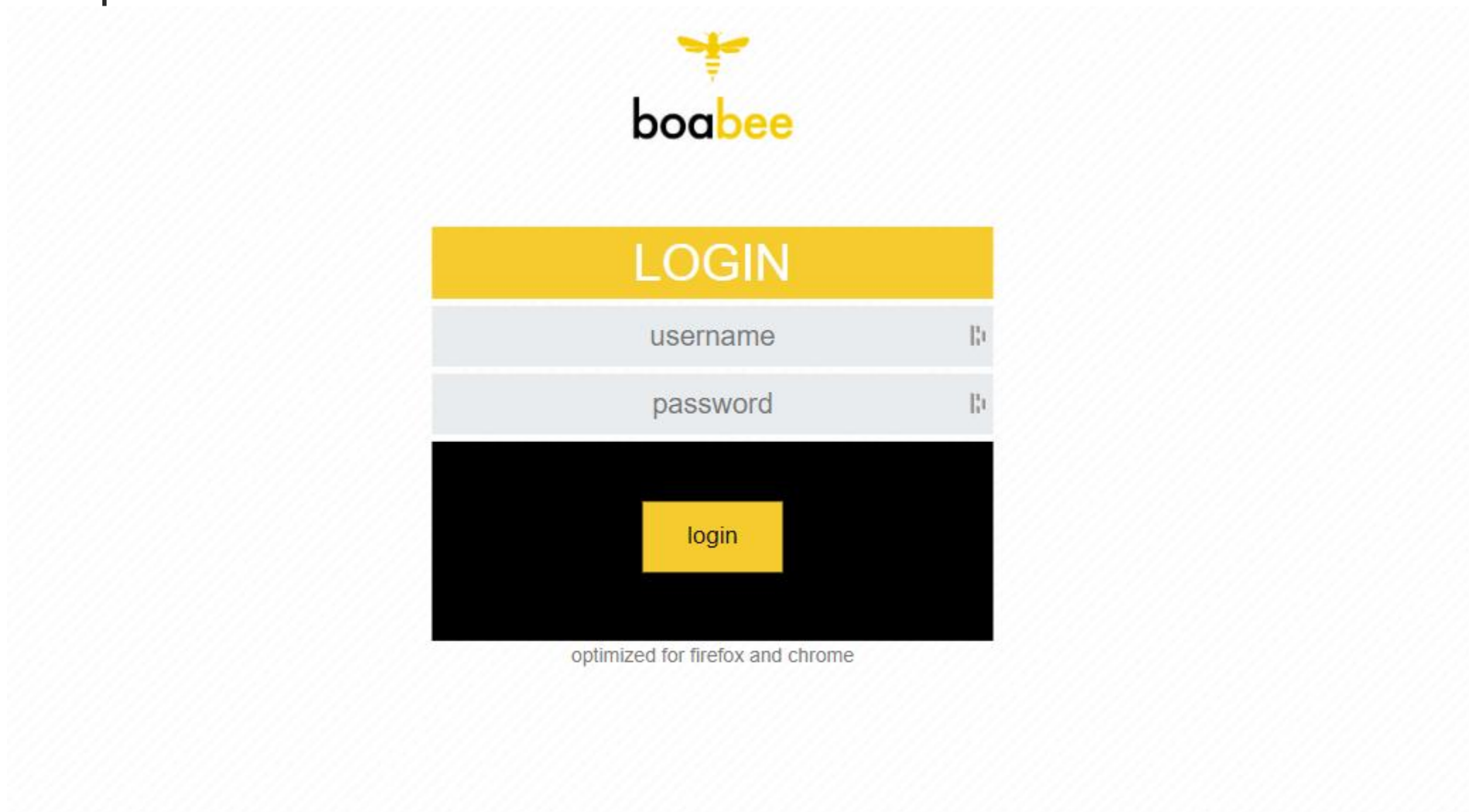
3 days after the fair a last final version of the report is sent to the responsible.

How to **prepare** if you go pro

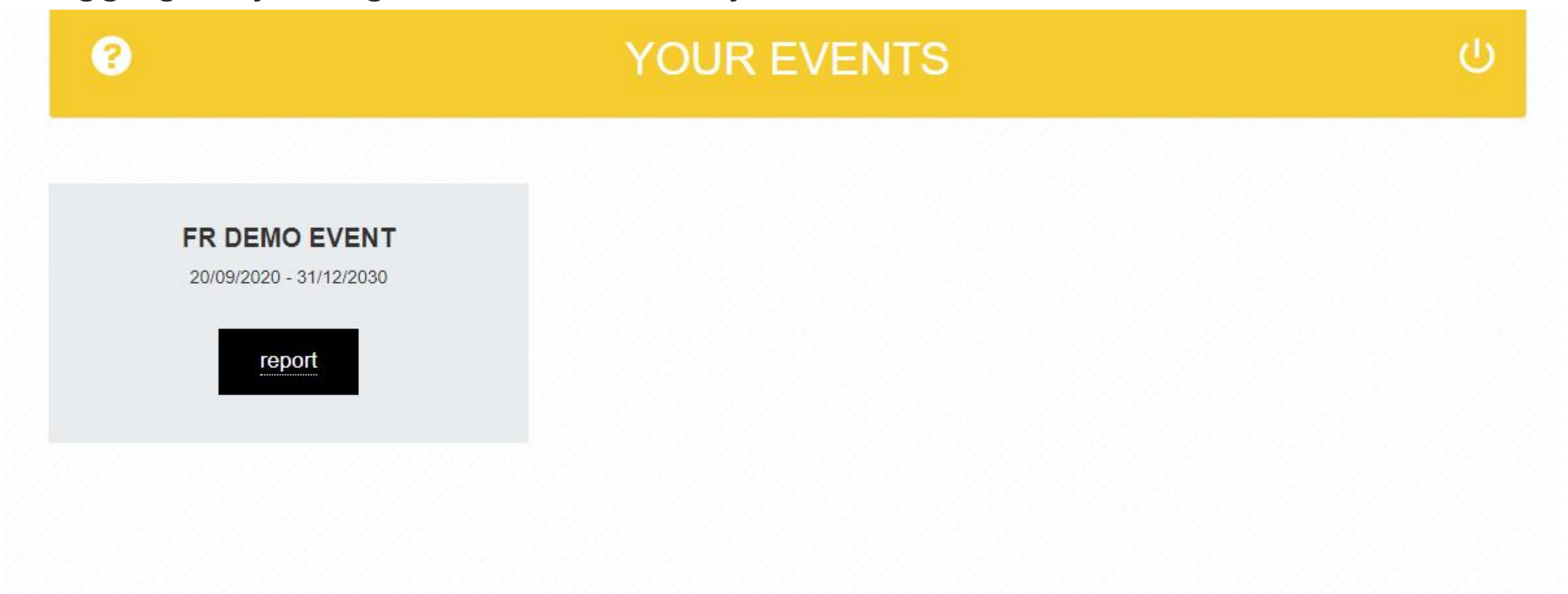
If you choose to work with the standard questions and not to use the sharing functionality of the boabee app, then you can skip this chapter. Follow the procedure below if you want to do one of the following:

- Add your own questions
- Upload your documentation and weblinks
- Select the email template that will be used to send info to your visitors

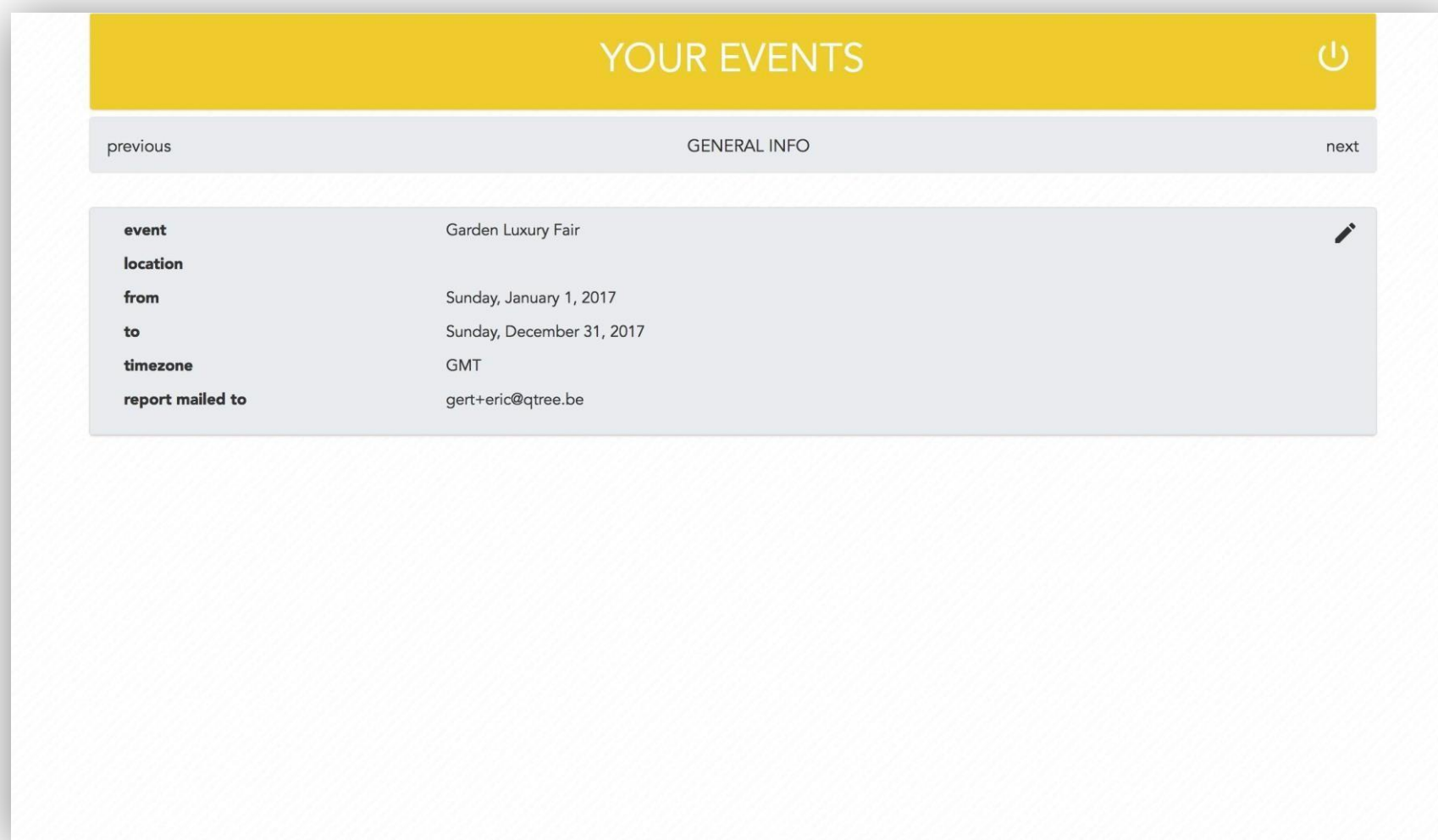
1) Go to <https://dashboard.boabee.com/login>, click **Sign in**, log in with your username and password.




2) After logging in, you'll get an overview of your active events. Select an event.



3) The general information about your event is shown. Use the edit button to change the email address to which the report will be mailed. Click Next to move on.

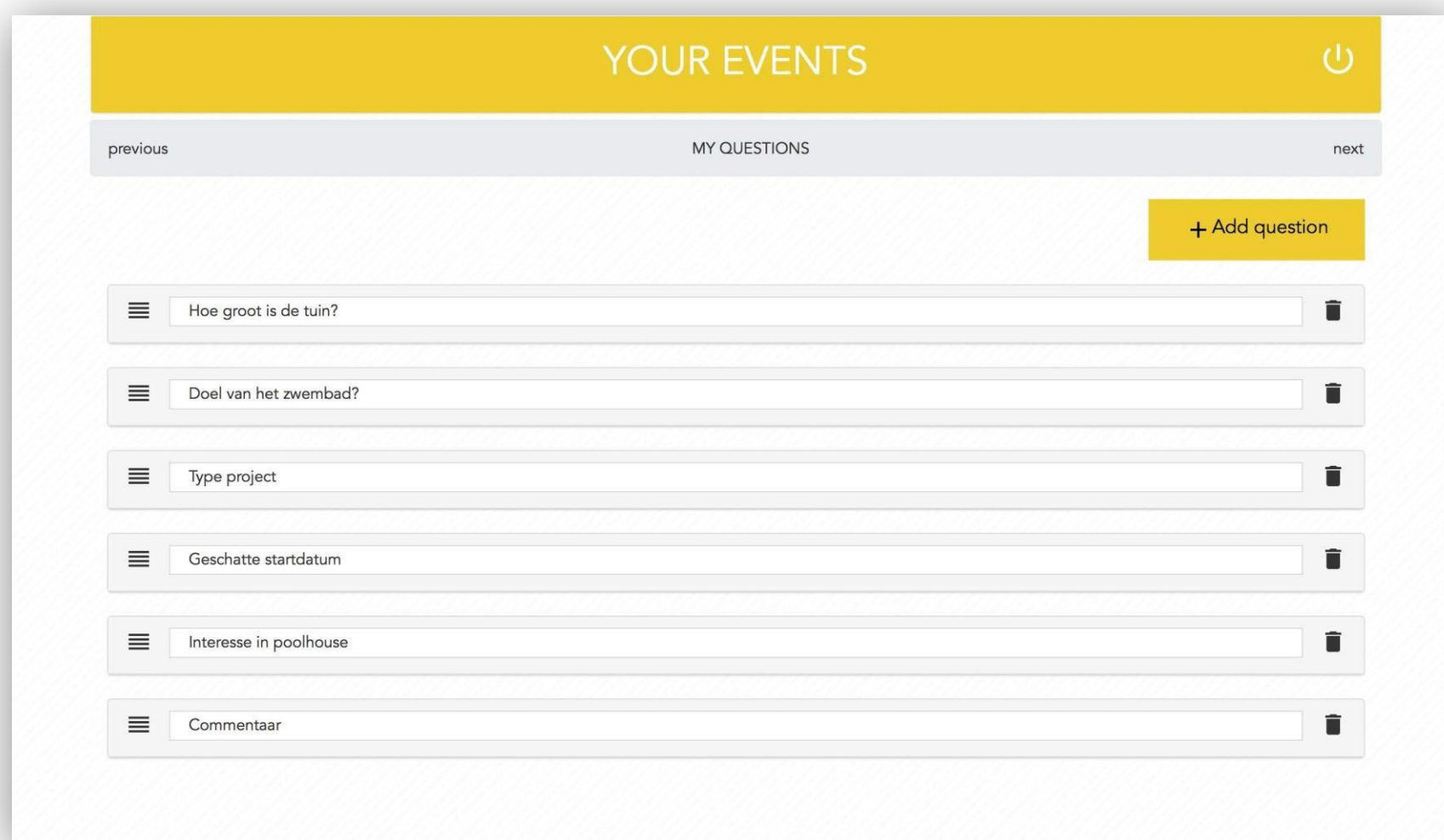


The screenshot shows a web interface titled "YOUR EVENTS" with a yellow header. Below the header is a navigation bar with "previous" and "next" buttons, and "GENERAL INFO" in the center. The main content area displays event details in a table-like format:

event	Garden Luxury Fair	
location		
from	Sunday, January 1, 2017	
to	Sunday, December 31, 2017	
timezone	GMT	
report mailed to	gert+eric@qtree.be	

4) The questions to qualify your leads are shown.

- Use Drag & Drop to change the order
- Use the Trash-icon to delete questions
- Start typing in the empty box to add a new question. Details about the type of question and - of relevant - the selection values will be asked in a popup.
- Click Next to move on.



The screenshot shows the "YOUR EVENTS" interface with a yellow header. Below the header is a navigation bar with "previous" and "next" buttons, and "MY QUESTIONS" in the center. A yellow button labeled "+ Add question" is visible. Below this, there is a list of six questions, each in a white box with a trash icon on the right:

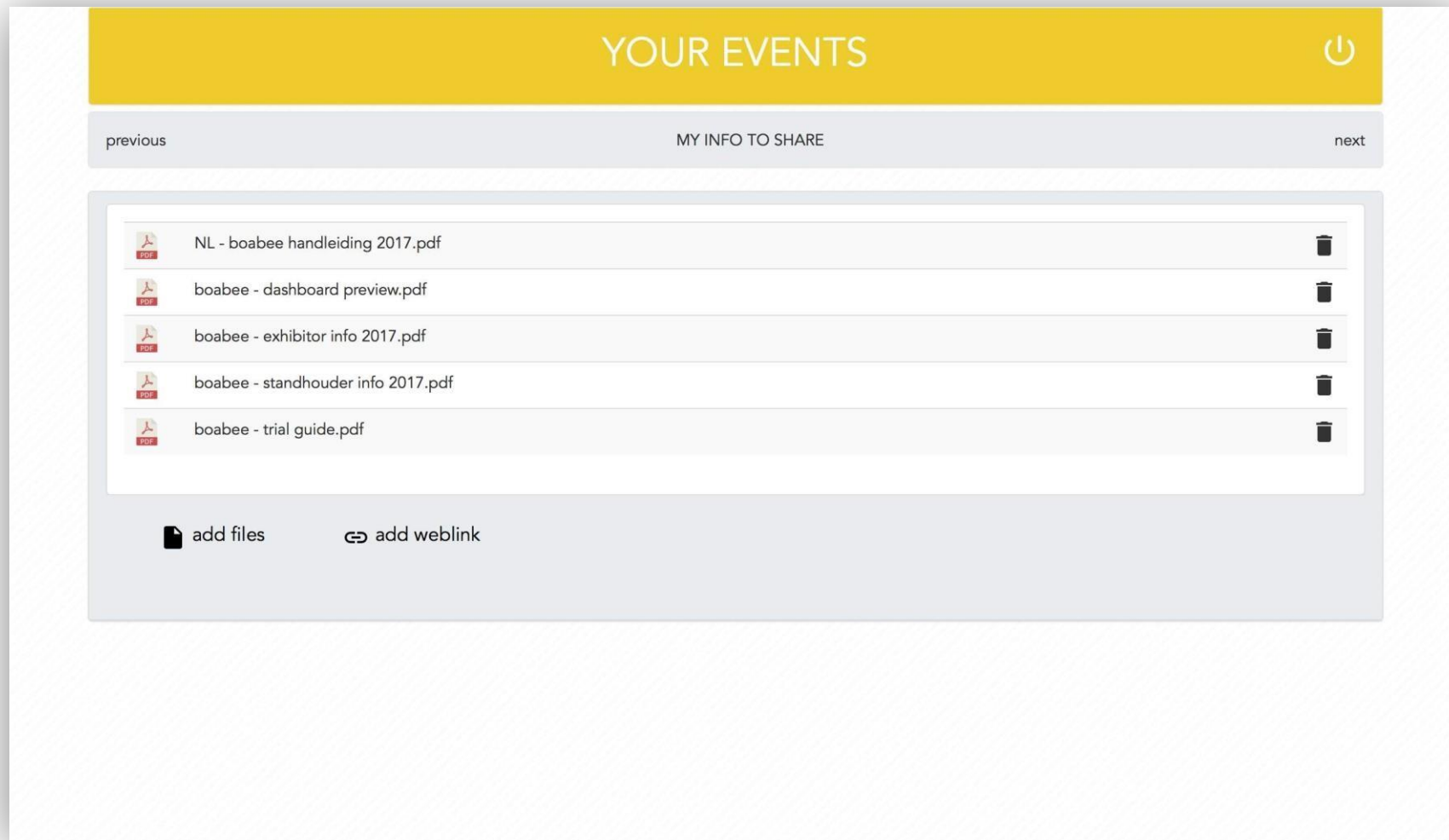
- Hoe groot is de tuin?
- Doel van het zwembad?
- Type project
- Geschatte startdatum
- Interesse in poolhouse
- Commentaar

TIPS

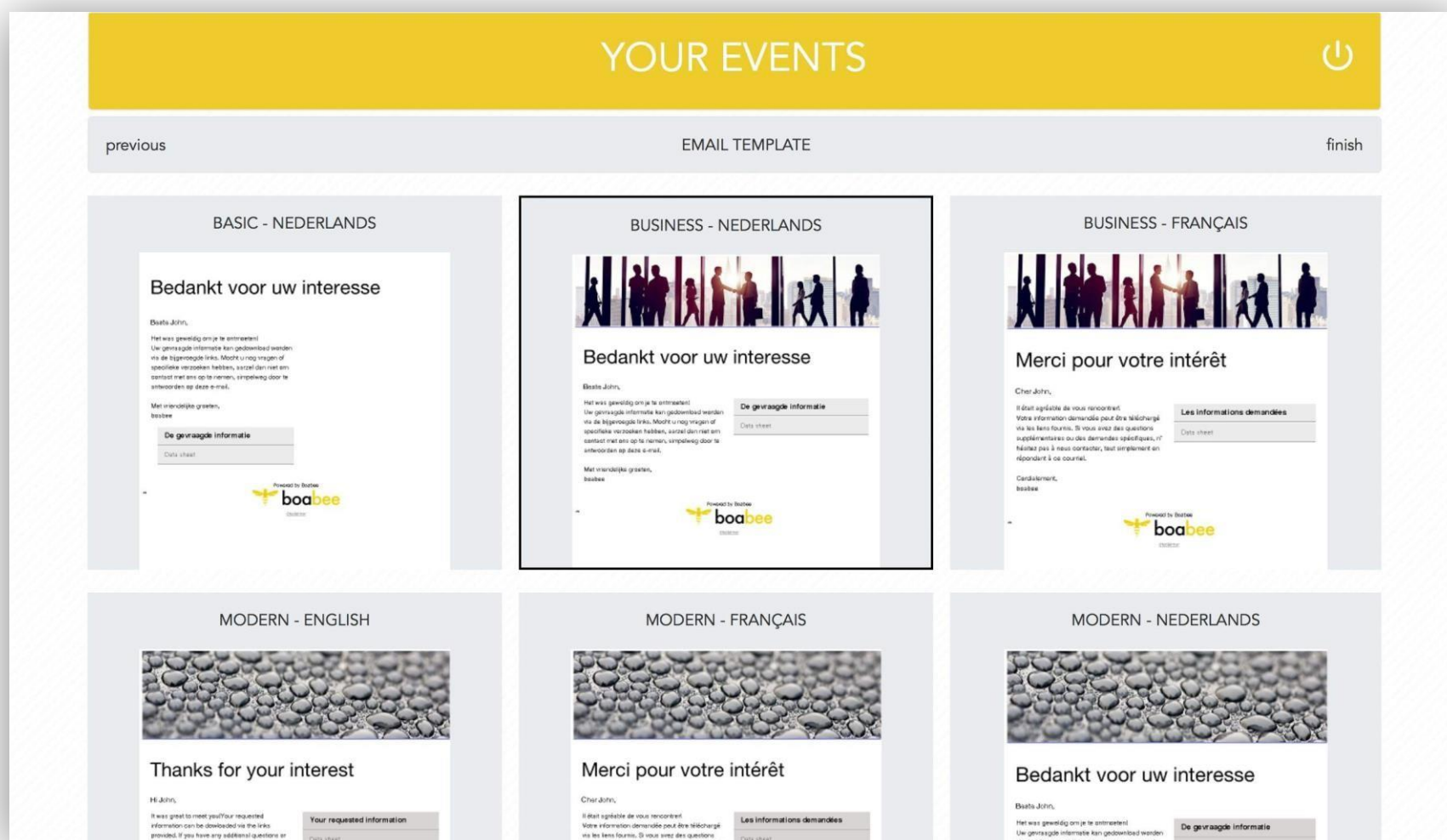
- Think well about your questions.
- We advise to use 5 to 7 questions.
- Use single/multiple choice as much as possible.
- Ensure you have at least 1 free text field.

How to **prepare** if you go Pro

5) In this next screen you can upload your files and links. In the app you will be able to make a selection specifically for the visitor you scanned. The visitor will receive an email with download links to the selected material. Click Next to move on.



6) In this last screen you can select the email template that will be used to send selected material to your visitor. Important: if no material has been selected, no email will be sent. Click Finish to return to the Events overview.



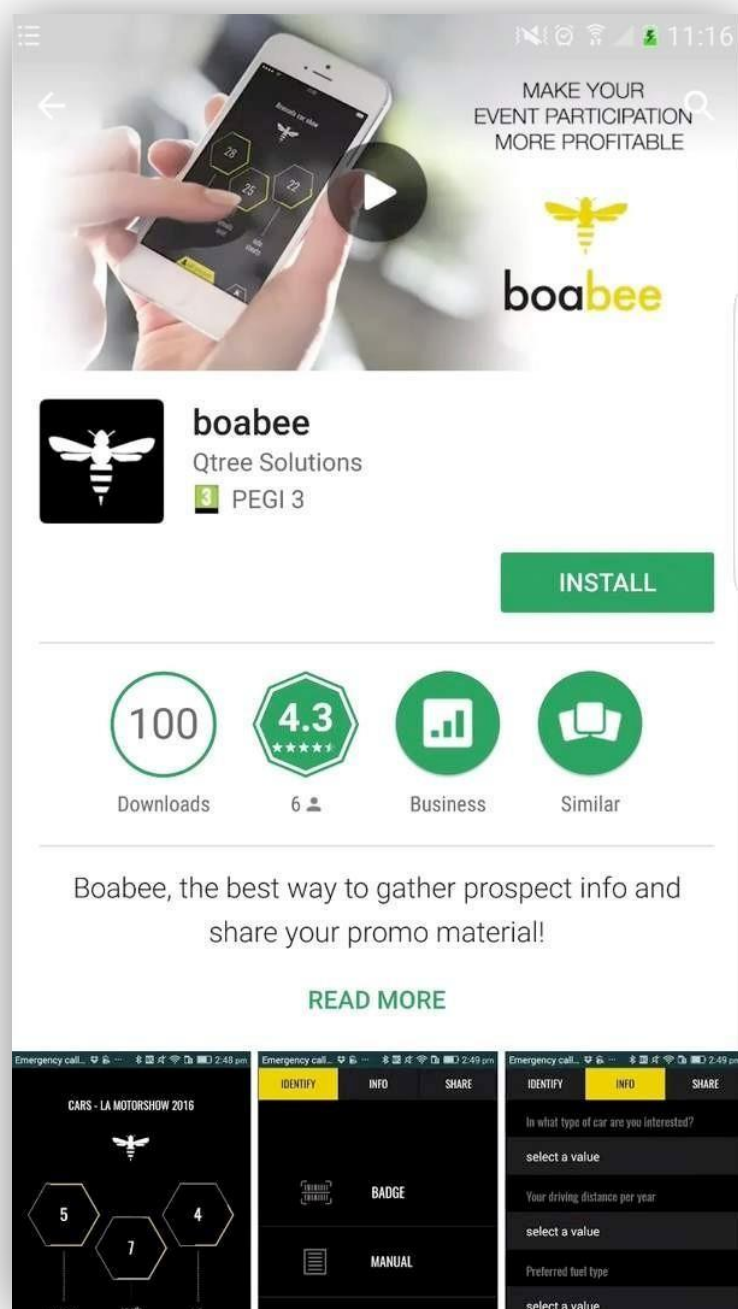
How to use the boabee app

1. Before the fair: Install the App

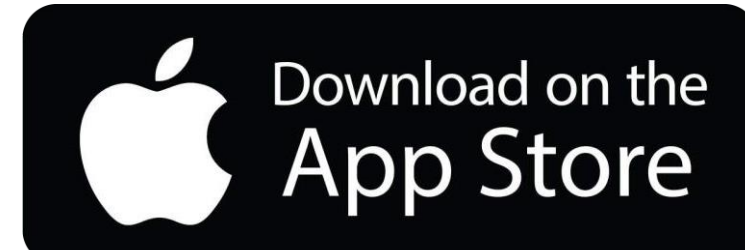
Android devices



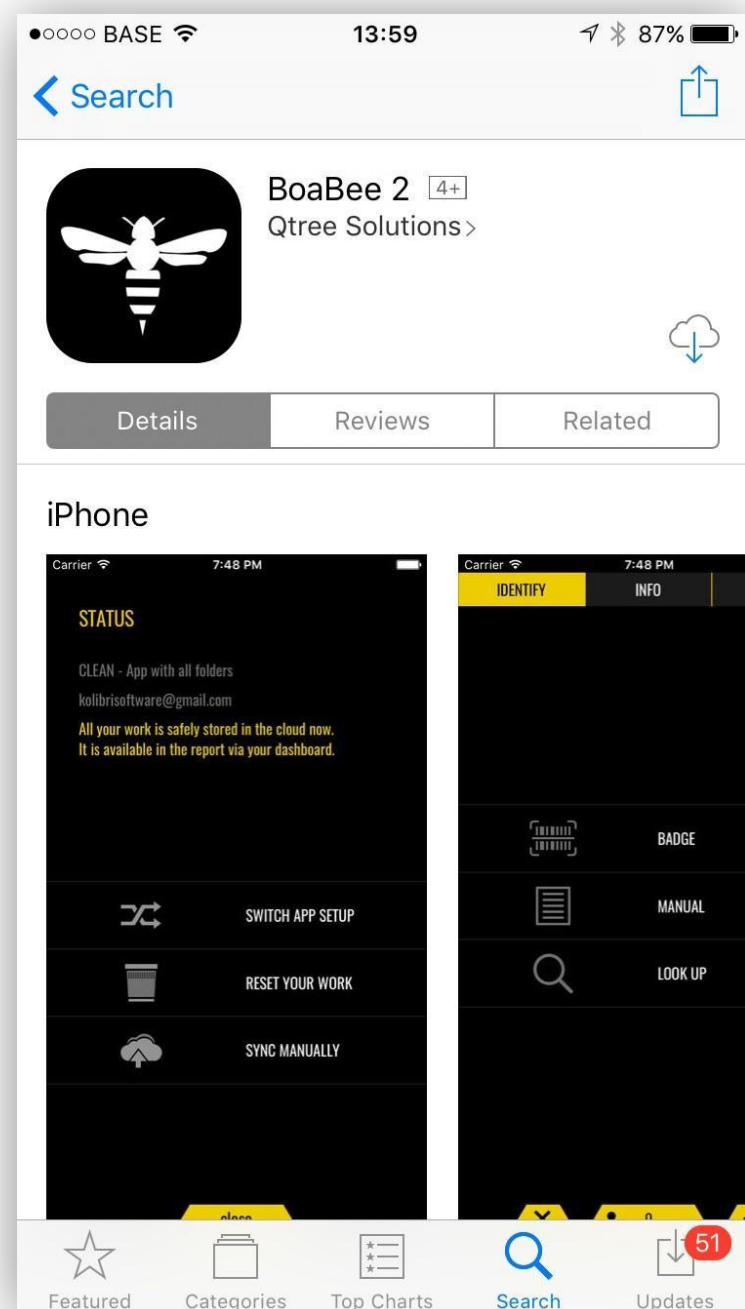
Search "Boabee"



Apple devices



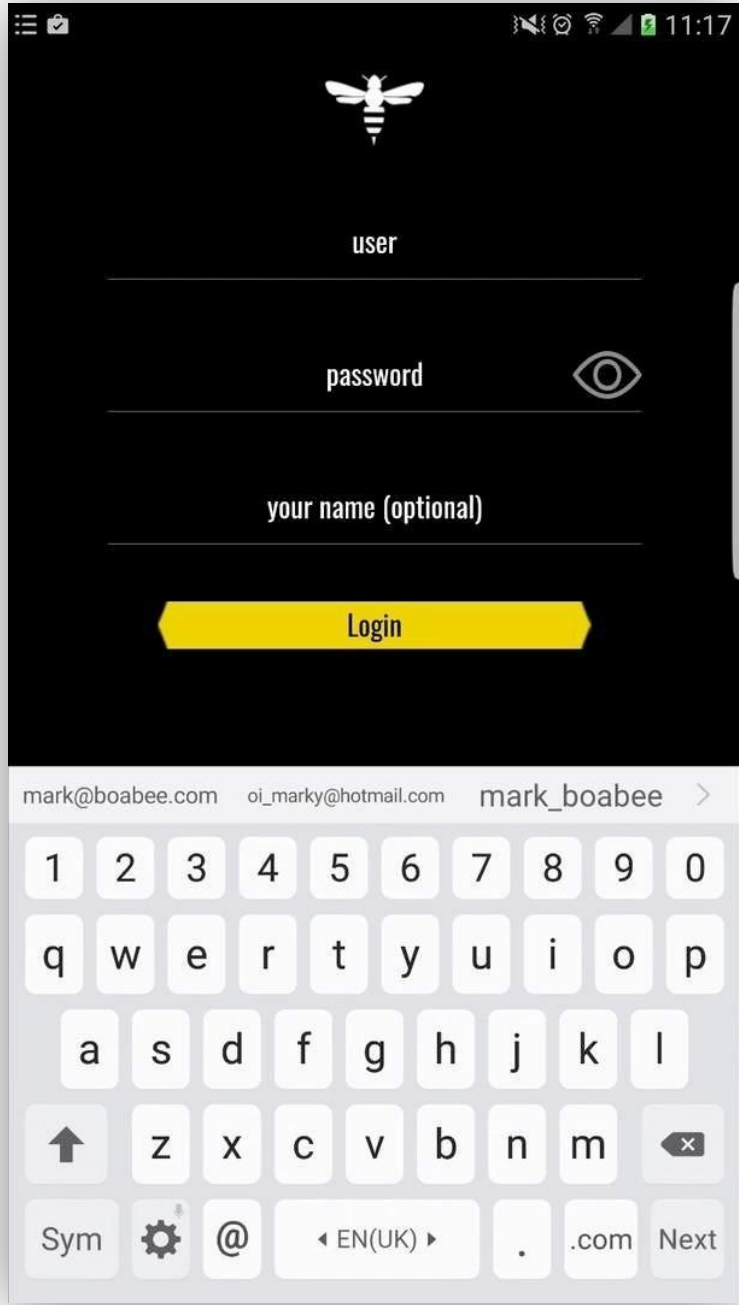
Search "Boabee 2"



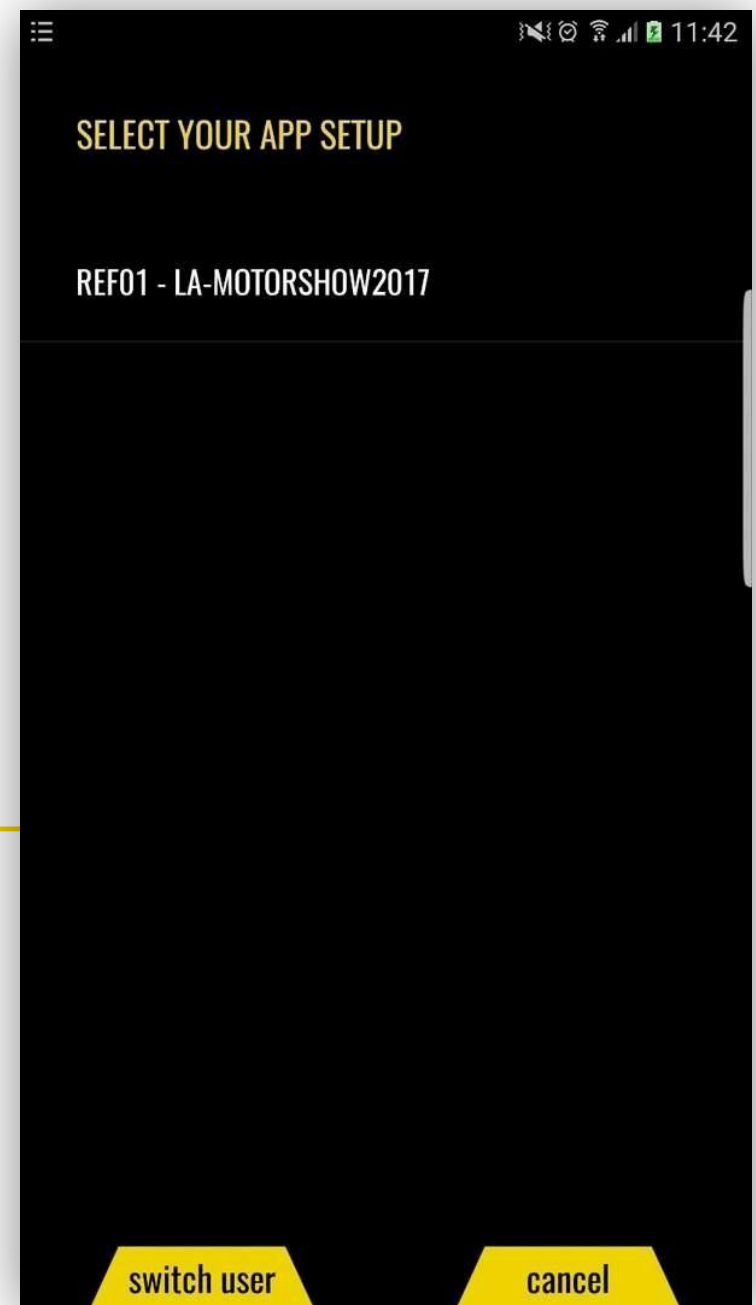
2. Before the fair: log in

You need to enter your credentials and select the setup for the upcoming event. Once that's done, you are ready to use the app at your event.

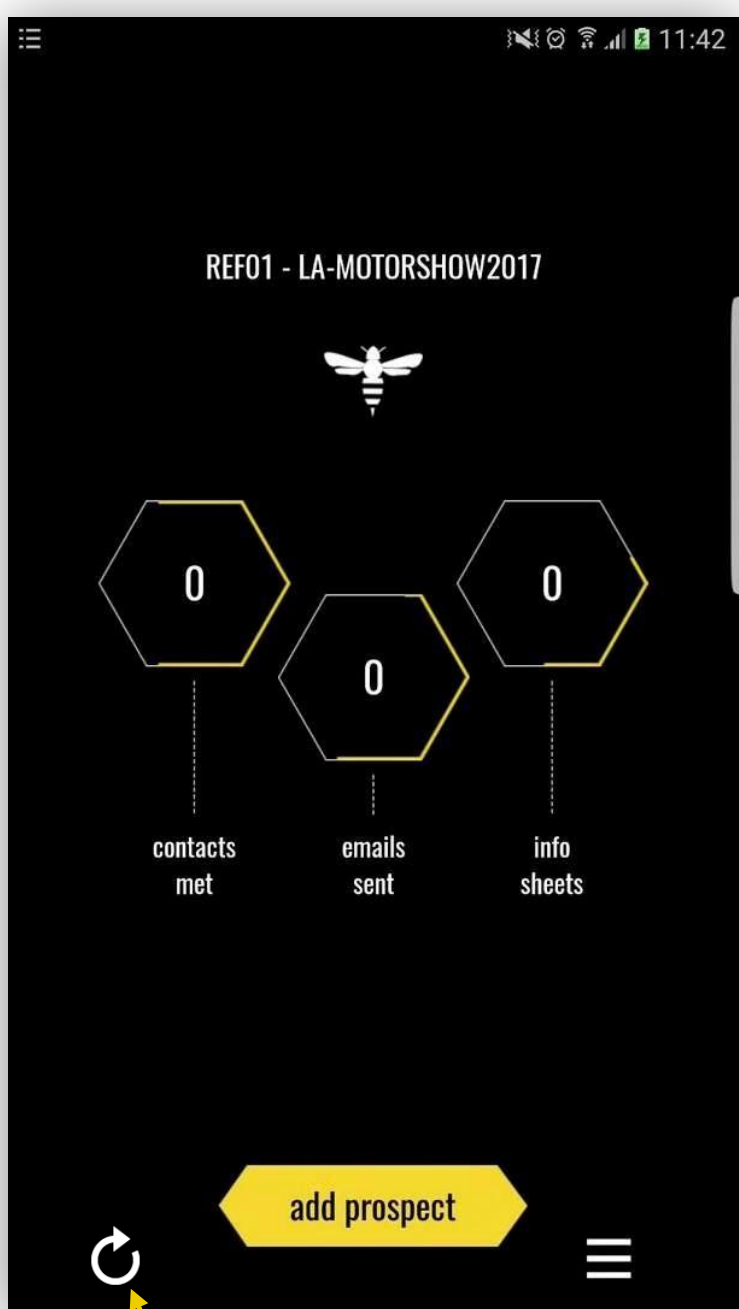
Note: Stable Internet Connection is required to use Boabee App.



*enter username and password
optionally enter your full name*



select the app setup for your event. If you have multiple events in parallel, ensure to pick the right setup!



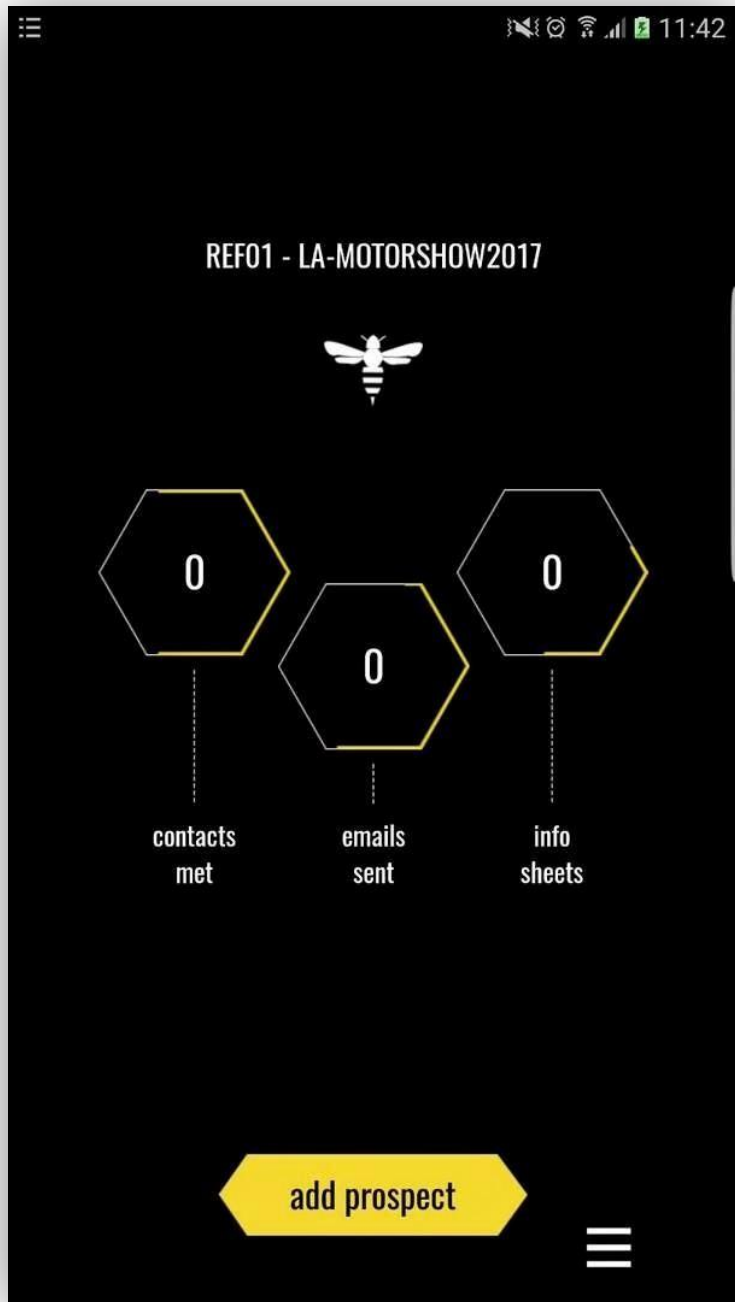
After downloading all your assets the app is ready to be used at the fair

*Made changes in het dashboard?
tap here to download the changes.*

3. At the fair: collecting leads

Collecting a lead means you go through 3 steps, of which only the first is mandatory:

- identifying the visitor
- qualifying the visitor with the questions
- selecting material to send to the visitor

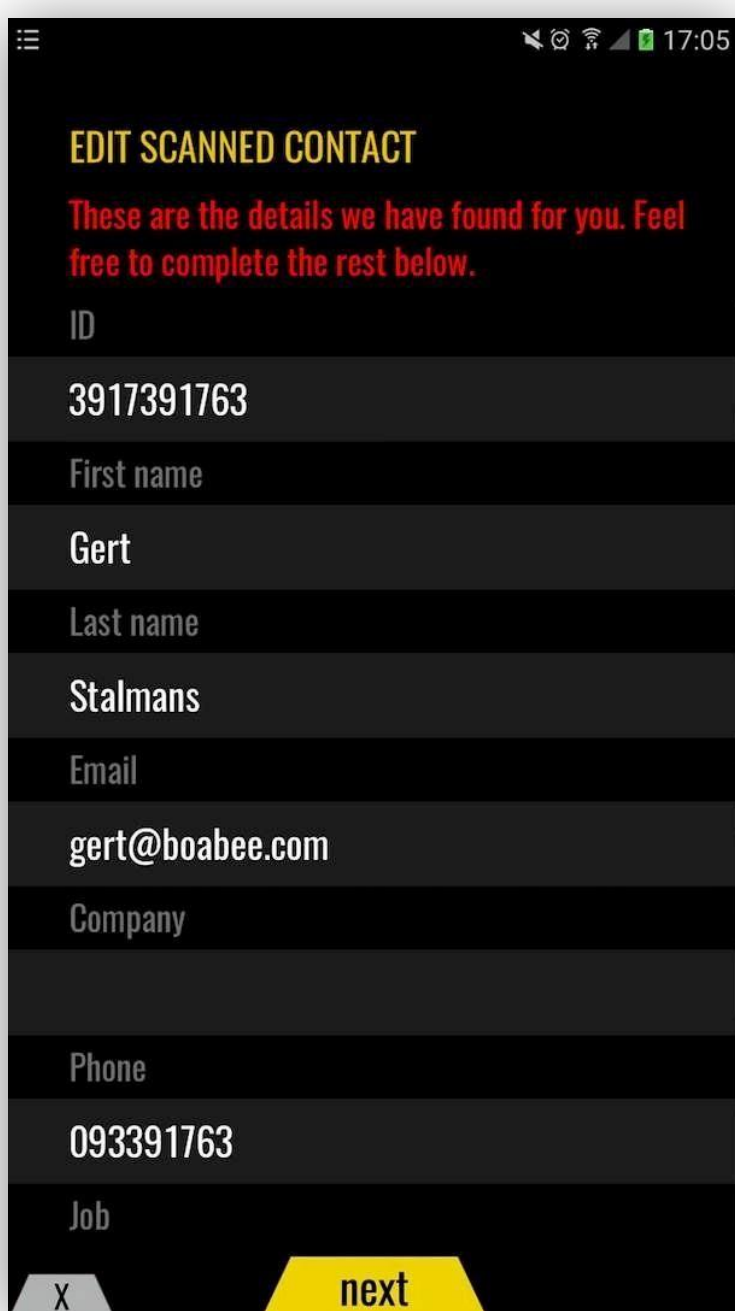


tap on "Add prospect" to start collecting a lead

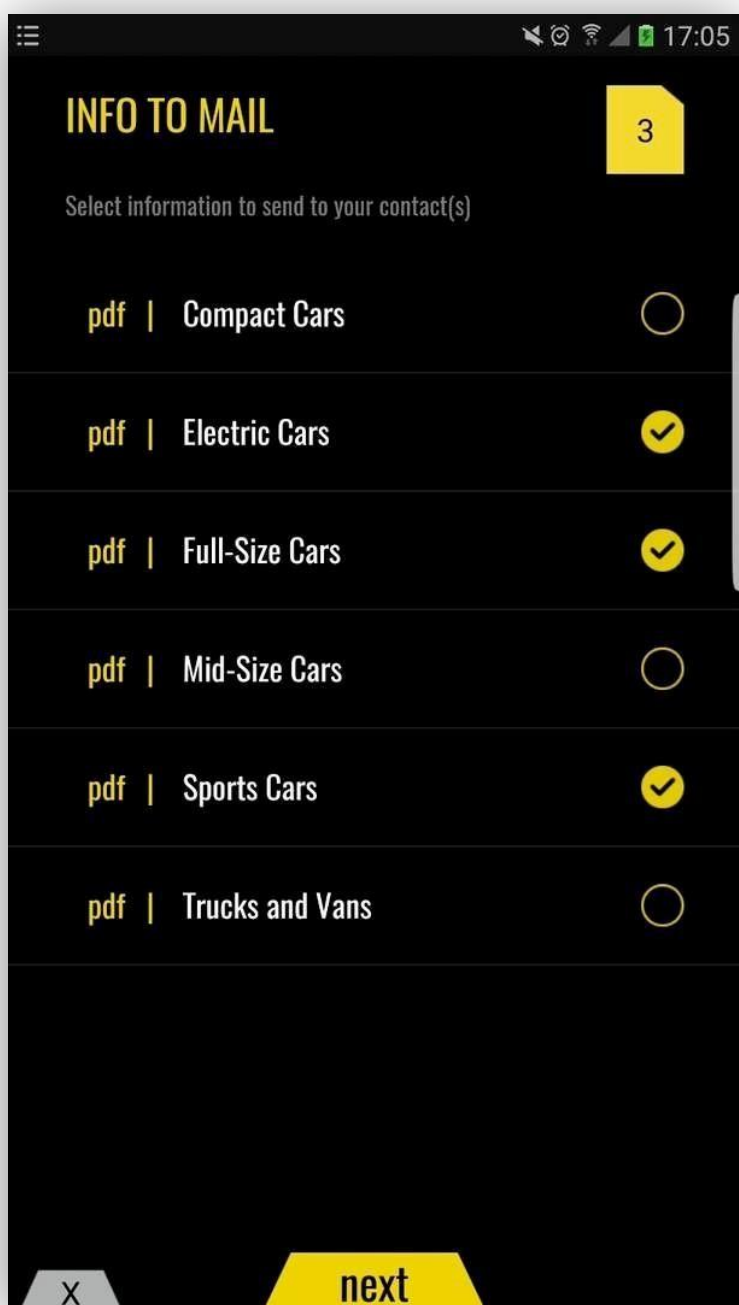
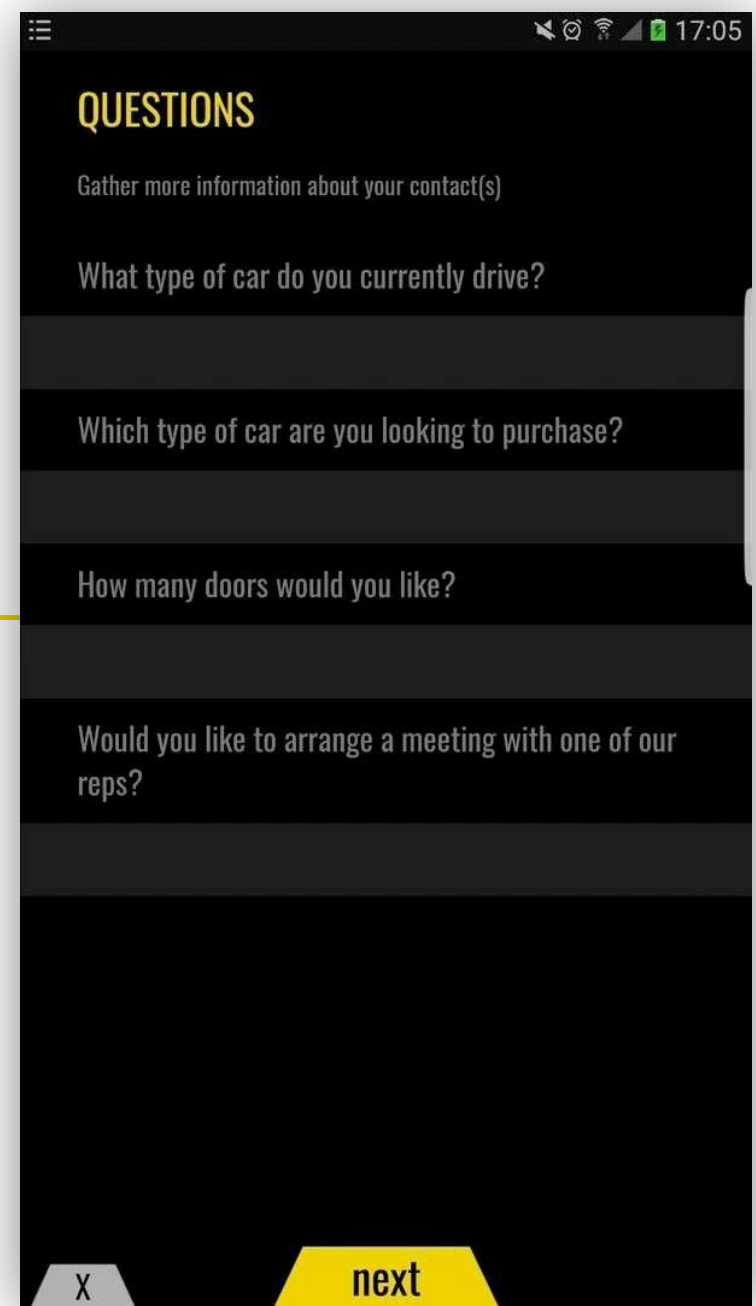
step 1: point the camera at the visitor's badge. As an alternative there is a manual entry and look up function as well.



The information of the visitor is retrieved from the visitor database. If there is no internet connection available, the information will not be visible on your device, but it will be automatically added to your report. You are free to complete the info in this screen.

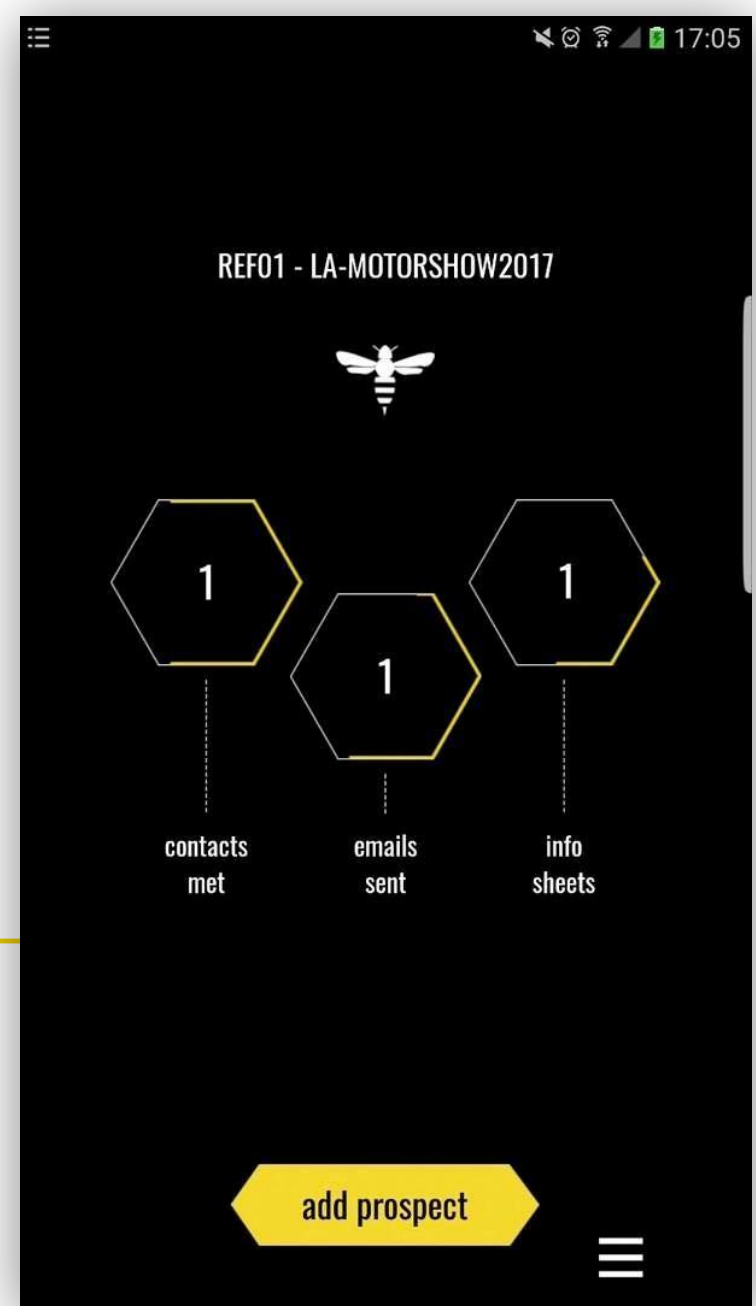


step 2 (optional): use your questions to qualify the visitor. If there are no questions defined, this step will not be available



step 3 (optional): select the information you want to mail to your visitor. That's it, you're done.

Back on the homescreen, you can verify your work by tapping the numbers in the hexagons.



About the Report

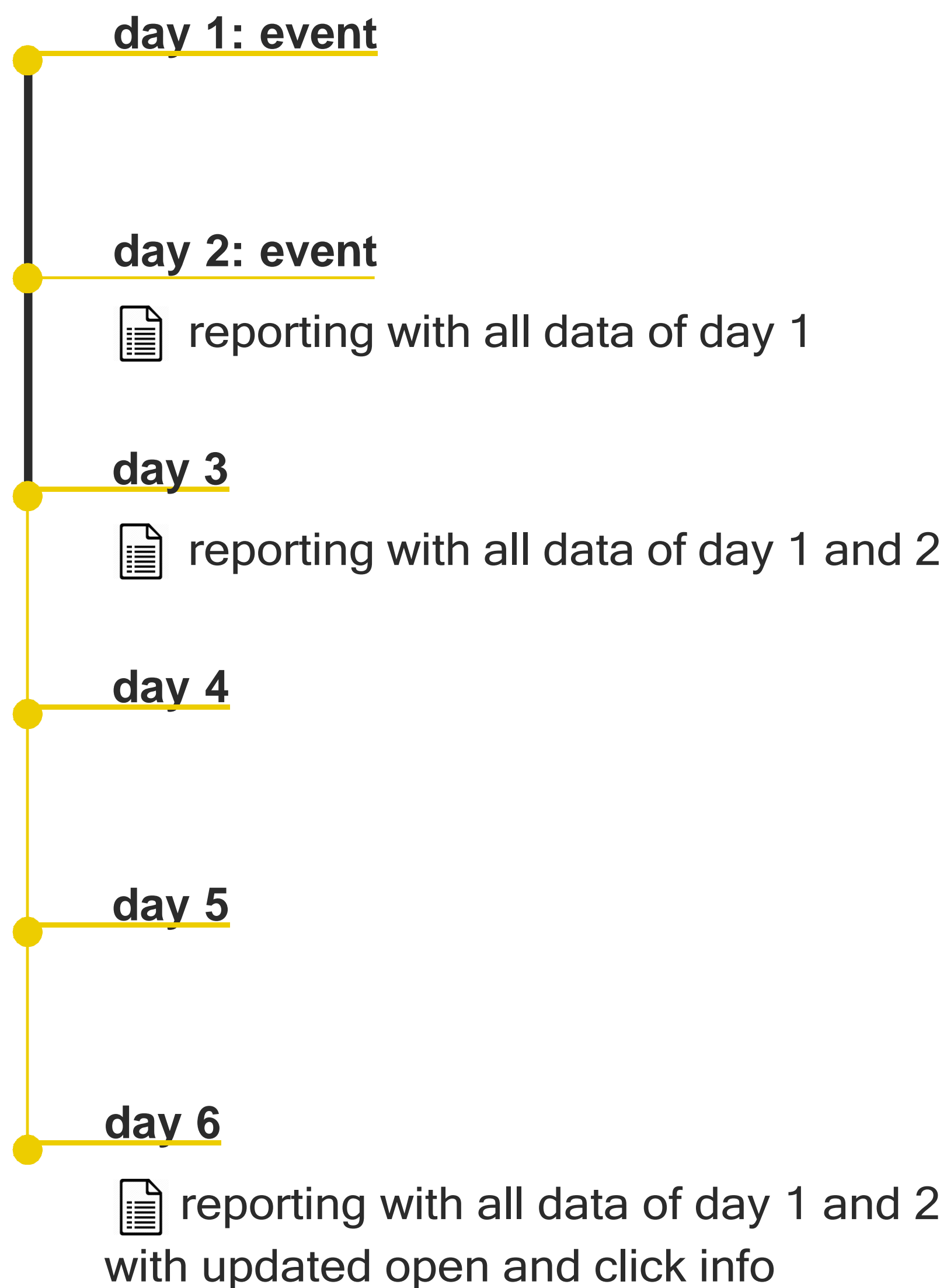
1. When do I get my report?

You will receive your report

- intermediate versions: every morning after an event day
- final version: 3 days after the event

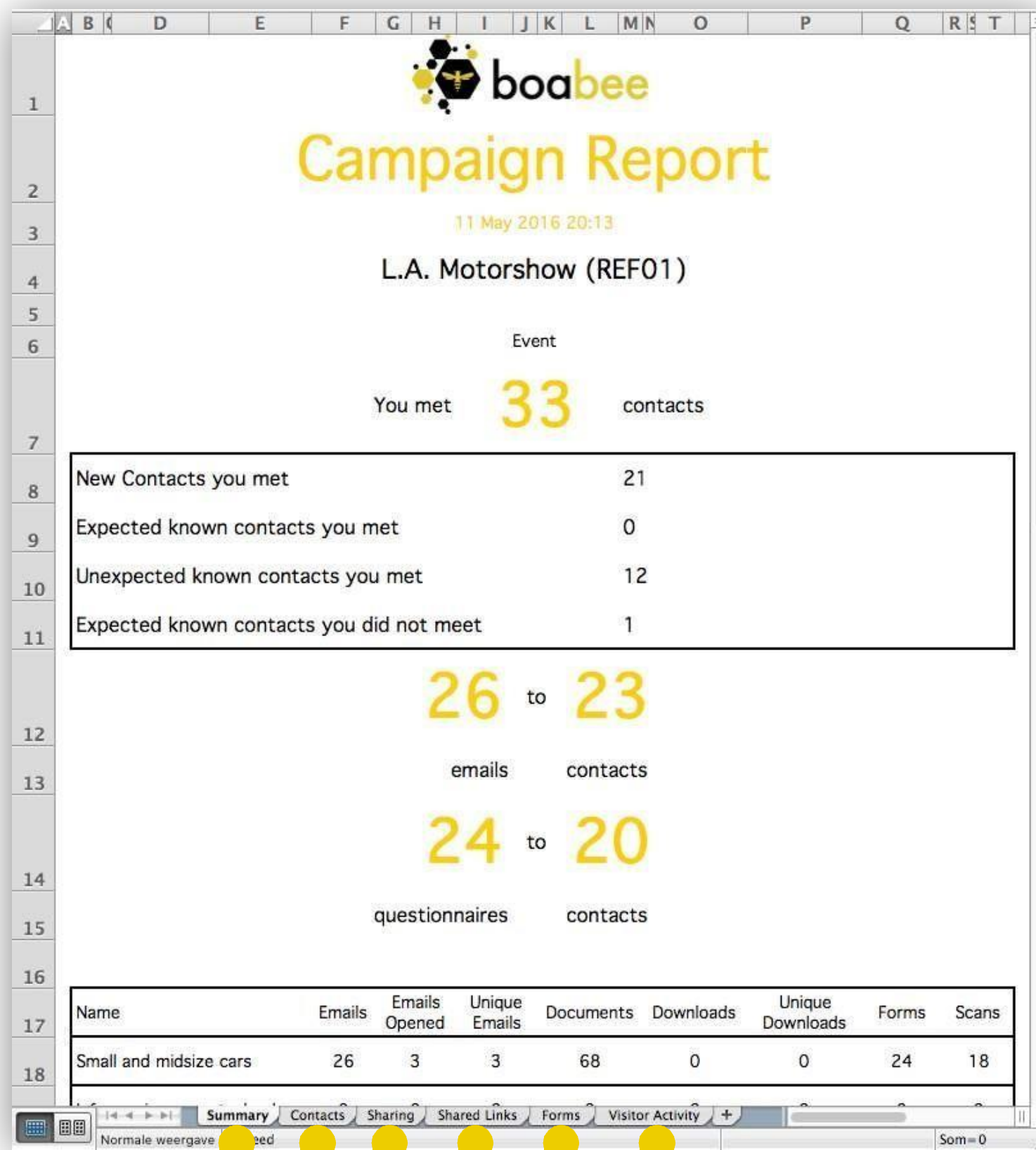
the difference between the last intermediate report and the final report is updated info about opens and clicks of the sent emails.

Example for a 2 day event:



2. What is in the report?

The report is an Excel file, containing all the information collected by your team at the event.



The report contains 6 different tabs, starting with a Summary. The tabs *Contacts*, *Sharing* and *Forms* contain the "raw data" about the scanned badges, the information that has been sent, and the lead-questions that have been completed.

Important to know

- The **contacts tab** contains 1 row per contact. on this row you will also find information about how often a contact is scanned, how many emails have been sent, when your team was the first and last time in touch with this person, etc. The relevance of this detailed information depends on the number of representatives using the lead retrieval app.
- The **sharing tab** contains one or more rows per sent email. Each row represents one piece of information. For example, if you have sent your brochure, a price list and the link to your website to a visitor, this will be presented as 3 rows. The columns *Email nbr* and *Link nbr* indicate which rows belong together.
- The **shared links tab** presents an overview of all pieces of information that have been mailed to visitors, how often each of them has been sent, and how often it has been opened.
- The **forms tab** contains one or more rows for each completed set of lead-questions. Each row represents one answer. For example, if you answered 4 questions for a visitor, then this will be presented as 4 rows. The columns *Form nbr* and *Question nbr* indicate which rows belong together.
- The **visitor activity** tab contains every step done with the app for each scanned visitor. It is a rather technical tab which is only relevant for detailed analysis on how visitors were handled at your booth.



boabee

support@boabee.com

[Boabee Website](#)