

For Exhibitors

Exhibitor Lead Retrieval & Appointments in the Confex Meeting App

2022

The Exhibitors' Experience	2
Exhibitor Access to Exhibitor Pages	3
Exhibitors' View of Their Own Exhibitor page	3
Managing Leads: Conversations	4
Managing Leads: Contact List	4
Managing Leads: Email Notificatons	4
Urgency, Priority, Staff & Notes	5
Attendees' Access to Exhibitor Pages	6
Attendee's Initial Contact	6
Attendees' Pre-Conversation View of Exhibitor's Pages	7
Attendees' View of Conversations With Exhibitors	7
Exhibitors' Access to Manage Appointments	9
Creating Appointment Times	10
An Appointment Has Been Scheduled	11
An Appointment Has Been Confirmed	11
Managing Appointment Conversations	12
Attendees' Option to Schedule	13
Select a Date from Available Times	13
Add Comment or Question	14
Page Will Update	14
Appointment Has Been Confirmed	15
Join Now Button Is Now Available	15



► Lead Retrieval In a Virtual Environment

The following pages are broken down into two sections on how to use Lead Retrieval. Section one covers the **exhibitors' experience**. The second section is a breakdown of the **attendees' experience** as noted below.

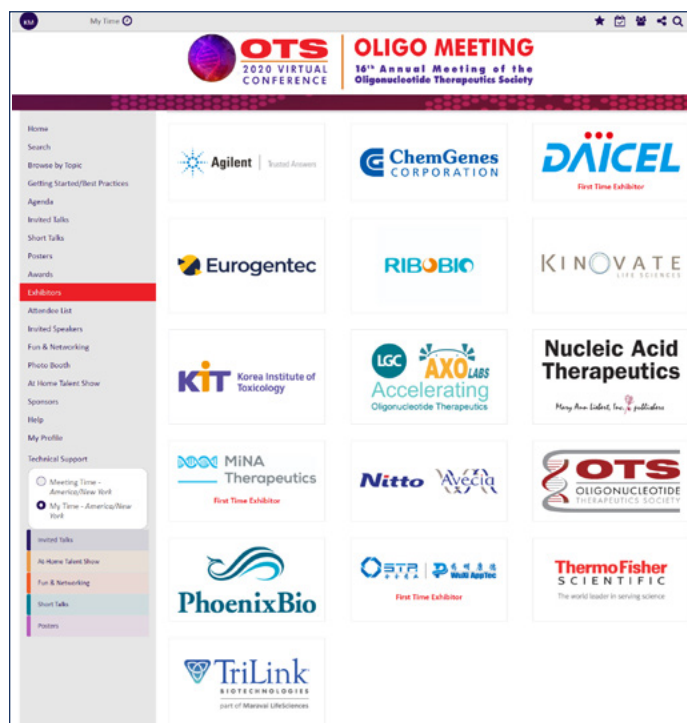
Exhibitor Access to Exhibitor Pages	3
Exhibitors' View of Their Own Exhibitor page	3
Managing Leads: Conversations	4
Managing Leads: Contact List	4
Managing Leads: Email Notifications	4
Urgency, Priority, Staff & Notes	5
Attendees' Access to Exhibitor Pages	6
Attendee's Initial Contact	6

Lead Retrieval: The Exhibitors' Experience



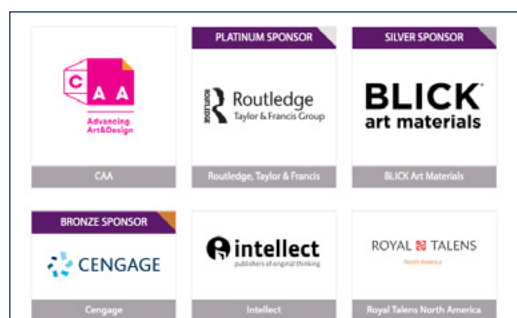
1 • Exhibitor Access to Exhibitor Pages

Exhibitors who log in to the Meeting site will be able to browse the site, including the Exhibitor Index.



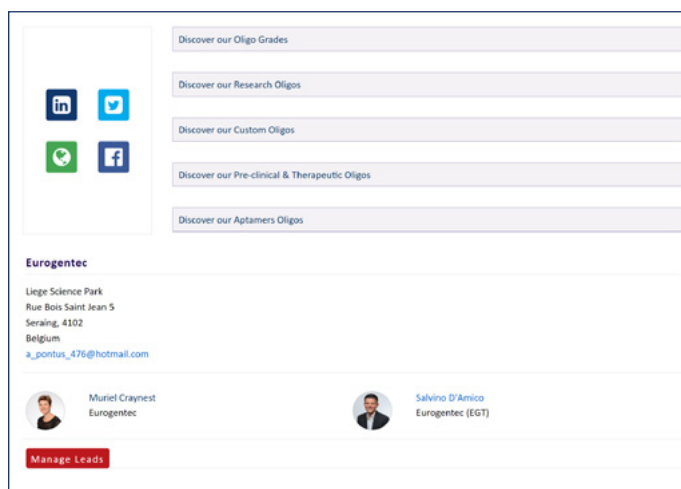
Exhibitors will have access to their exhibitor pages and lead management during the meeting and optionally well beyond the meeting. Meeting organizers will notify you well in advance of when access will be ending.

Any leads and conversations generated through the lead retrieval system will also be available to download before access to the meeting site ends.



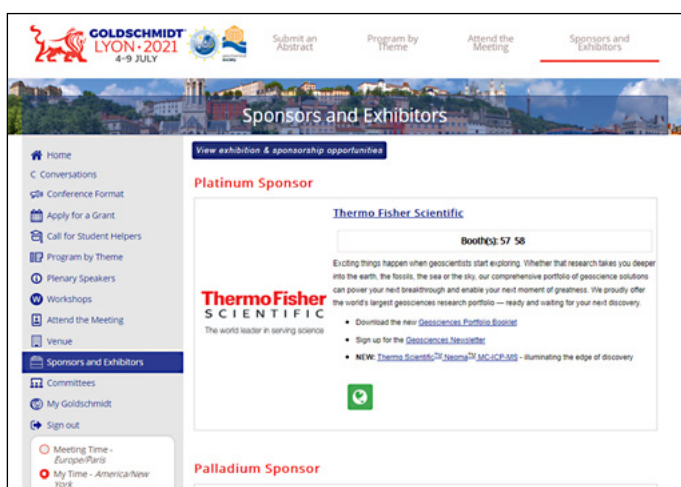
2 • Exhibitor's View of their own Exhibitor Page

No matter how many leads and conversations an exhibitor has going, the only thing they will see at the bottom of their page is a link to **Manage Leads**.



Exhibitors can manage their leads from clicking the **Manage Leads** button at the bottom of their Exhibitor page.

The lead management pages are unique for each exhibitor and can only be seen by exhibitor contacts who have logged in to the meeting site. Exhibitors cannot see other exhibitors contacts or lead management page information.



Screenshot samples are representative pages. Your pages may vary slightly.

Lead Retrieval: The Exhibitors' Experience

continued



▶ 3 • Managing Leads: Conversations

All Attendees who start a chat with an exhibitor, will be added to the exhibitor's **Inquiries** on the left side of the exhibitor's lead management page.

Once a Attendee starts a conversation, if they had previously chosen **YES!** when prompted, they will move from the **Contact List** to the **Inquiries**.

Expanding each Attendee's conversation will give access to the full conversation. All responses from any of a particular exhibitor's contacts will show in the same chat conversation.

- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.

▶ 4 • Managing Leads: Contact List

Once an Attendee clicks on an Exhibitor's page, they will be prompted to give permission to share their contact information (see the Attendee Initial Contact on pg 2).

All Attendees who choose **YES!** when prompted, will be added to the exhibitor's **Contact List** on the right side of the exhibitor's lead management page.

▶ 5 • Managing Leads: Email Notifications

Emails will be sent to exhibitors each time:

- an Attendee chooses YES!
- an Attendee starts or continues a conversation
- an exhibitor contact responds in a conversation.

The screenshot displays the exhibitor lead management interface for the Oligo Meeting 2020 Virtual Conference. The top header includes the event logo and name. The left sidebar contains navigation links such as Home, Search, Browse by Topic, Agenda, and Exhibitors. The main content area is divided into two sections: 'Inquiries' and 'Contact List'. The 'Inquiries' section shows a chat conversation between a registrant, Karen, and an exhibitor, Alycia Testing. The chat history includes three messages: Karen's initial inquiry, Alycia's response, and Karen's follow-up question. The 'Contact List' section lists attendees who have agreed to share their contact information, including Test, Test, Testing, Karen, and Zenga, Alycia. The bottom of the page features a 'SUBMIT COMMENT' button and a section for 'Additional comment/question/response'.

Screenshot samples are representative pages. Your pages may vary slightly.

Lead Retrieval: The Exhibitors' Experience

continued



Urgency, Priority, Staff & Notes

► 1 • Ranking Leads

For each attendee who's badge is scanned, the exhibitor may rank the lead, using Value (1-5), and Urgency (1-5). Exhibitors may also assign Staff, and leave a Note for each lead.

This information is available on the Leads page and is only visible to the exhibitor.

Contact List

Attendees who have agreed to share their name and email are listed here.

Garman, Michelle

michelle.confex@gmail.com

Potential: Urgency: Assigned Staff:

Notes: Edit

Editing: Garman, Michelle

Potential:

1

2

3

4

5

Urgency:

1

2

3

4

5

Assign Staff:

Scott, Nathan

Notes:

Additional Notes

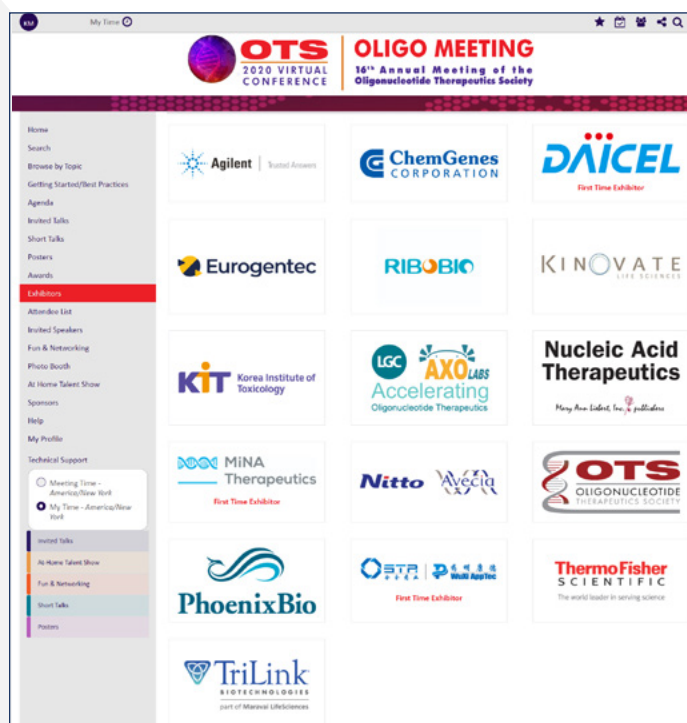
Submit Cancel

Lead Retrieval: The Attendees' Experience



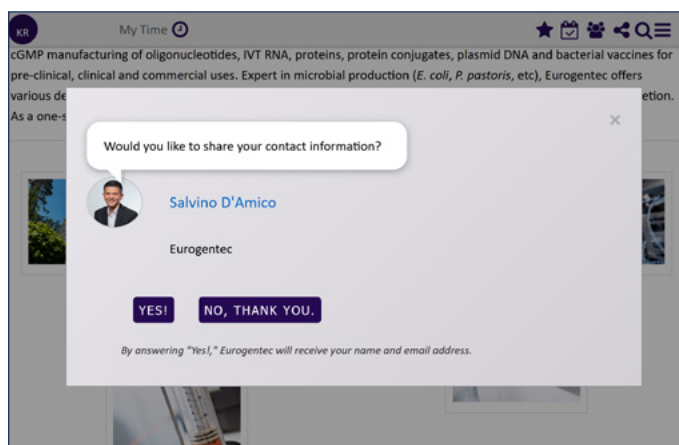
► 1 • Attendees' Access to Exhibitor Pages

Attendees (meeting attendees/registrants) who log in to the Meeting site will be able to browse the site, including the Exhibitor Index. Optionally, exhibitor pages may be publicly available, but lead retrieval only works with logged in users.



► 2 • Attendee's Initial Contact

Once an Attendee clicks on an Exhibitor's page, they will be prompted to give permission to share their contact information.



The Attendee has 3 options:

1. They can **close the prompt** without answering. They will be prompted again on their next visit. No information will be sent to the exhibitor.
2. If they **choose YES!** the prompt closes, and the exhibitor now has a new lead in their contact list. They will not be prompted again. Information will be sent to the exhibitor and their choice will be saved into the meeting site data.
3. If they **choose NO, THANK YOU**, the prompt closes. No information is sent to the exhibitor. No data is saved to the meeting site, but their choice will be stored locally on their device. They will not be prompted again *unless they clear the cache in their browser, or use a different device to log in and access the page.*

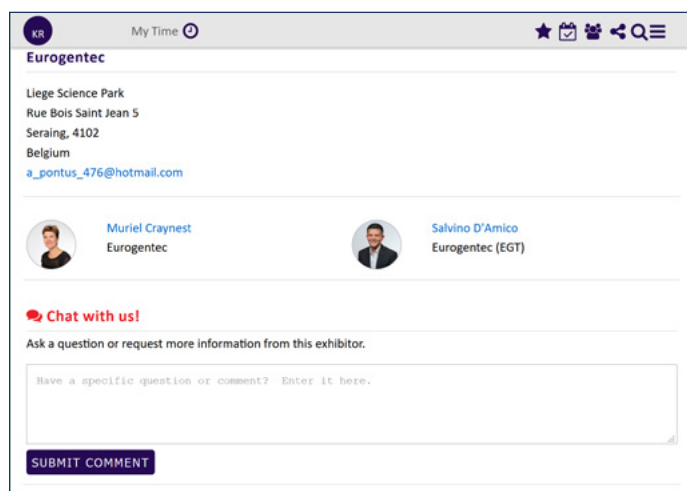
Lead Retrieval: The Attendees' Experience

continued



▶ 3 • Attendee's Pre-Conversation View of Exhibitor Pages

Whatever option the Attendee has chosen upon their initial contact, they will see an invitation to chat at the bottom of the page.

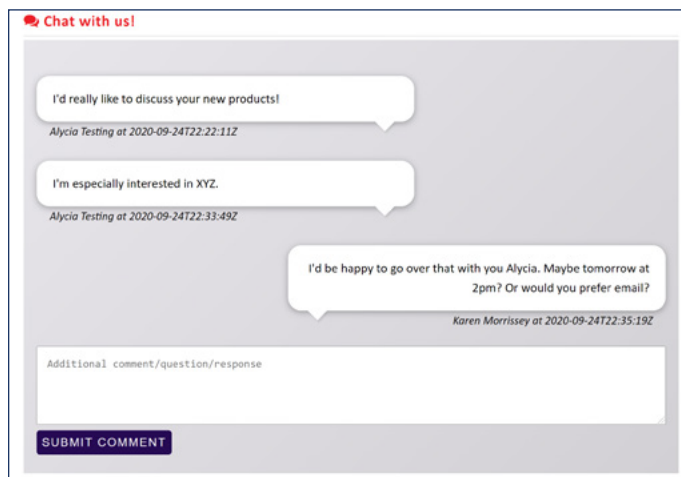


If the Attendee previously chose NO at the prompt, or if they simply closed out of the prompt, they still can initiate a conversation with the exhibitor, just like those who chose YES.

▶ 4 • Attendee's View of Conversations with Exhibitors

Once a conversation is started, that conversation will be visible to the Attendee only, as shown below, at the bottom of the Exhibitor's page.

- **Each Attendee can only see their own conversation with an individual exhibitor.** If someone else has started a conversation with the same exhibitor, they can not see each other's conversations.
- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.



Screenshot samples are representative pages. Your pages may vary slightly.



► Managing Appointments to Leverage Visibility and Communication

Making connections is a primary goal for all who attend meetings. The following pages are broken down into two sections on how to use Managing Appointments. Section one covers the **exhibitors' experience**. The second section is a breakdown of the **attendees' experience** as noted below.

Attendees' Pre-Conversation View of Exhibitor's Pages	7
Attendees' View of Conversations With Exhibitors	7
Exhibitors' Access to Manage Appointments	9
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An Appointment Has Been Scheduled	11
An Appointment Has Been Confirmed	11
Managing Appointment Conversations	12
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► 1 • Exhibitors' Access to Manage Appointments

The exhibitor/sponsor will see two buttons on their page, Manage Leads, and Manage Appointments.

ThermoFisher

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Booth(s): 57 58

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Primary Contact

Darcy Testing

Manage Leads

Manage Appointments

No one has scheduled an appointment yet.



Manage Leads
and Manage
Appointments



► 2 • Creating Appointment Times

Notice times are required for Europe/Paris

When clicked, the section below expands to reveal time blocks



Meeting Timezone



Minimize Manage Appointments

Enter and Edit Appointment Availability

Note: All times will be in the meeting timezone: **Europe/Paris**

A time block spanning multiple days will create appointment time slots for the full 24 hours.

Create a Time Block

Interval:

Start Date:

Start Time:

End Date:

End Time:

Appointment Title:

Short Description:

Current Time Blocks

Note: you can only edit or delete unassigned time blocks

Monday, 5 July 2021

☒ ☐ 09:00 – 12:00 / appointments every 15 minutes
[Chat with us](#)

Tuesday, 6 July 2021

☒ ☐ 12:00 – 15:00 / appointments every 15 minutes
[Consult an expert](#)



New appointment time block form intervals: 15, 20, 30, 45, 60 minutes. Dates are available for conference dates only.



Time blocks that are created will automatically display here.






▶ 3 • An Appointment has been Scheduled

When the exhibitor/sponsor logs in, they will see the appointment has been scheduled:

Primary Contact

 Darcy Testing

Manage Leads

Manage Appointments

Below are all your one-on-one appointments with attendees.

Join 'Thermo Fisher Scientific' meeting with Marie-Aude Hulshoff Test on 5 July, 10:00 - 10:15

CANCEL APPOINTMENT

ADD APPOINTMENT URL

▶ 4 • An Appointment Has Been Confirmed

They may then add an appointment URL and confirm the appointment.

Add your
Appointment
URL



Manage Appointments

Below are all your one-on-one appointments with attendees.

Join 'Thermo Fisher Scientific' meeting with Marie-Aude Hulshoff Test on 5 July, 10:00 - 10:15

CANCEL APPOINTMENT

ADD APPOINTMENT URL

CONFIRM APPOINTMENT

CANCEL



► 5 • Managing Appointment Conversations

All Attendees who book an appointment with an exhibitor, will be added to the exhibitor's **Inquiries** on the left side of the exhibitor's lead management page.

Expanding each Attendee's conversation will give access to the full conversation. All responses from any of a particular exhibitor's contacts will show in the same chat conversation.

- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.
- During the course of this, the attendee and exhibitor/sponsor contact are receiving automatic email notifications to let them know of activity.

The screenshot displays the 'Lead Retrieval' interface for ThermoFisher Scientific. On the left is a navigation menu with options like Home, Conversations, Conference Format, and various event-related links. The main content area is titled 'Lead Retrieval' and features the ThermoFisher Scientific logo and tagline. Below this, a red button says 'RETURN TO EXHIBITOR PAGE'. A descriptive text explains the page's purpose for managing conversations. The 'Inquiries' section shows a list of attendees, with one entry expanded to show a conversation with Marie-Aude Hulshoff. The conversation history includes messages from the attendee and the exhibitor, along with a Zoom link. A 'Contact List' on the right shows attendees who have agreed to share their contact information.

Lead Retrieval

ThermoFisher SCIENTIFIC

The world leader in serving science

[RETURN TO EXHIBITOR PAGE](#)

Use this page to manage conversations that attendees have started with you. You also have access to a contact list of attendees once they have chosen to share their information with you.

Inquiries

▼ Hulshoff Test, Marie-Aude, mahulshoff@gmail.com

Marie-Aude Hulshoff shared their contact information.

I'm looking forward to visiting your booth!

Marie-Aude Hulshoff at 2021-01-29T00:03:15Z

Appointment has been scheduled. I have some very specific questions!

Marie-Aude Hulshoff at 2021-01-29T00:27:19Z

URL Updated: zoom.us/9badz8005z2

Additional comment/question/response

[SUBMIT COMMENT](#)

Contact List

Attendees who have agreed to share their name and email are listed here.

UnaA@confex.com
uabernathy@gmail.com

EXPANDED VIEW
During the course of this, the attendee & exhibitor/sponsor contact are receiving automatic email notifications to let them know of activity, sessions, topics or programs.



► 1 • Attendees Option to Schedule

When the attendee visits a page where appointments time blocks are setup, they have an option to schedule a meeting.

Schedule a Meeting



Primary Contact

DT Darcy Testing

Connect with us!

I'm looking forward to visiting your booth!

Marie-Aude Hulshoff at 2021-01-29T00:03:15Z

Additional comment/question/response

SUBMIT COMMENT

SCHEDULE A FACE TO FACE MEETING

► 2 • Select a Date From Available Appointment Times

When clicked, that section expands, the user may select a date, and that day-section expands, to reveal the times (showing in the user's time zone).

Select From
Available Times



Primary Contact

KP Karin Persson

Chat with us!

Ask a question or request more information from this exhibitor. Your name and email will be shared with the exhibitor.

Have a specific question or comment? Enter it here.

SUBMIT COMMENT

SCHEDULE A FACE TO FACE MEETING

Please Select One Of The Available Times.

Chat with us!: June 30, 2021 10:00 AM - 12:00 PM

10:00 AM Jun 30	10:15 AM Jun 30	10:30 AM Jun 30	10:45 AM Jun 30	11:00 AM Jun 30	11:15 AM Jun 30	11:30 AM Jun 30	11:45 AM Jun 30
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Screenshot samples are representative pages. Your pages may vary slightly.



► 3 • Add Comment or Question

When selecting a time slot, they are asked if they have a question or comment:

You Have Selected:

Consult an expert: 4:00 AM July 5, 2021

Have a specific question you wish to address during appointment? Enter it here.

SUBMIT

CANCEL

► 4 • Page Will Update

Once a comment is submitted, the exhibitor/sponsor page will be updated (for the specific attendee):

Primary Contact

KP

Karin Persson

Chat with us!

Ask a question or request more information from this exhibitor. Your name and email will be shared with the exhibitor.

Have a specific question or comment? Enter it here.

SUBMIT COMMENT

You Have Selected:

Chat with us!: 11:00 AM June 30, 2021

Have a specific question you wish to address during appointment? Enter it here.

SUBMIT

CANCEL



► 5 • Appointment has been Confirmed

Once the exhibitor has confirmed the appointment, the verified time and date will appear above the 'cancel appointment' button.

Appointment
is confirmed



Connect with us!

I'm looking forward to visiting your booth!

Marie-Aude Hulshoff at 2021-01-29T00:03:15Z

Appointment has been scheduled.
I have some very specific questions!

Marie-Aude Hulshoff at 2021-01-29T00:27:19Z

Additional comment/question/response

SUBMIT COMMENT

Join 'Thermo Fisher Scientific' meeting with Marie-Aude Hulshoff Test on 5 July, 10:00 - 10:15

CANCEL APPOINTMENT

► 6 • Join Now button will appear 20 minutes before meeting begins.

Join Now button
appears 20 minutes
before the meeting



Additional comment/question/response

SUBMIT COMMENT

Join 'Thermo Fisher Scientific' meeting with Marie-Aude Hulshoff on 5 July, 10:00 - 10:15

JOIN NOW

Screenshot samples are representative pages. Your pages may vary slightly.