For Exhibitors

Exhibitor Lead Retrieval & Appointments
in the Confex Meeting App

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LEAD RETRIEVAL

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.

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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.
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.
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.
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.
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.
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.

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Managing Appointments: The Exhibitors’ Experience continued

1 • Exhibitors’ Access to Manage Appointments

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

![Thermo Fisher Scientific](image)

- Download the new [Thermofisher Portfolio Resolver](#)
- Sign up for the [Geosciences Newsletter](#)
- NEW: [Thermo Scientific™ Neora™ MC-ICP-MS](#) - Illuminating the edge of discovery

Primary Contact:
- Darcy Testing

Manage Leads
Manage Appointments

No one has scheduled an appointment yet.
2. Creating Appointment Times

Notice times are required for Europe/Paris.

When clicked, the section below expands to reveal time blocks.

Meeting Timezone

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.

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

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
3. An Appointment has been Scheduled

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

4. An Appointment Has Been Confirmed

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

 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.
Managing Appointments: The Attendees' Experience

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.

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).
Managing Appointments: The Attendees’ Experience

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
Managing Appointments: The Attendees’ Experience

5 • Appointment has been Confirmed

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

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