

This document shows how to capture leads at in-person events using the Captello mobile app. Users will learn how to

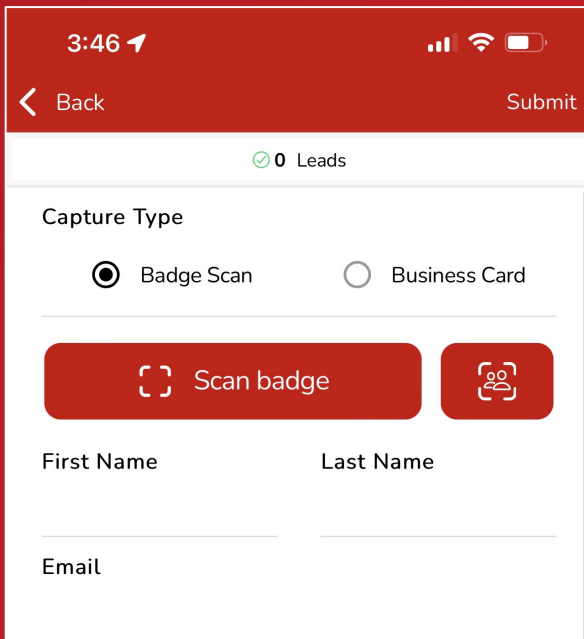
- Capture leads
- Send documents
- Review submissions

Please note that this guide uses the Captello Standard Template. Your organization may have created a custom template which may look different than the forms in this guide. Please refer to your account administrator if you have any questions.

Capturing Leads

To capture leads, download and authenticate the Captello app. The app is available in the Apple App Store, Google Play Store, and the Amazon App Marketplace. Please see our full documentation for minimum requirements. Once you have installed the app,

1. Tap on the event in the main menu.
2. Select Capture.
3. Select lead capture type (badge scan or business card) if applicable.



The screenshot shows the Captello mobile app interface. At the top, the status bar displays the time 3:46, signal strength, Wi-Fi, and battery icons. Below the status bar is a navigation bar with a back arrow and the text 'Back' on the left, and 'Submit' on the right. The main content area has a header with a green checkmark and the text '0 Leads'. Below this is a section titled 'Capture Type' with two radio button options: 'Badge Scan' (selected) and 'Business Card'. There are two large buttons: a red one with a camera icon and the text 'Scan badge', and a white one with a person icon. Below these are three input fields: 'First Name', 'Last Name', and 'Email'.

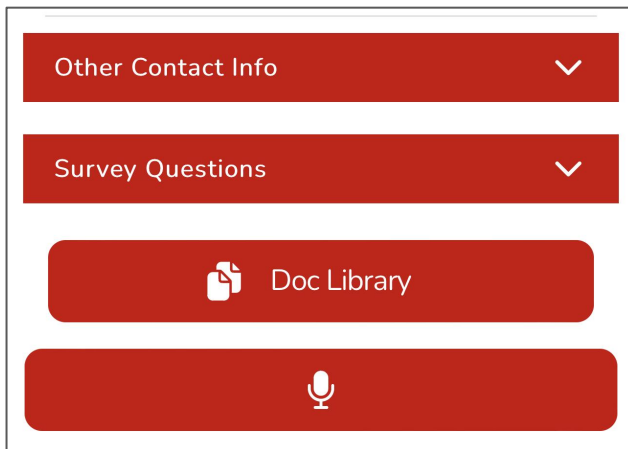
Your template design may vary from our examples. Review your organization's lead capture form with your account administrator before you begin scanning leads at your first event.

4. Scan the code on the attendee's name badge OR scan their business card.
5. Verify contact details.
6. Answer qualification questions.
7. Enter notes.
8. Tap Submit.

Important: your submission is not complete until you tap the Submit button. If you scan another badge or exit the form, **your lead capture data will be lost**. If you're not ready to submit a lead but need to move on to the next badge, use the Hold option instead

Sending Documents

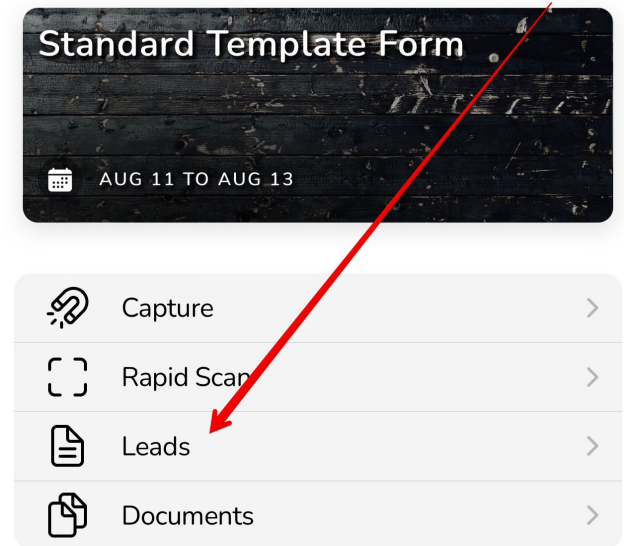
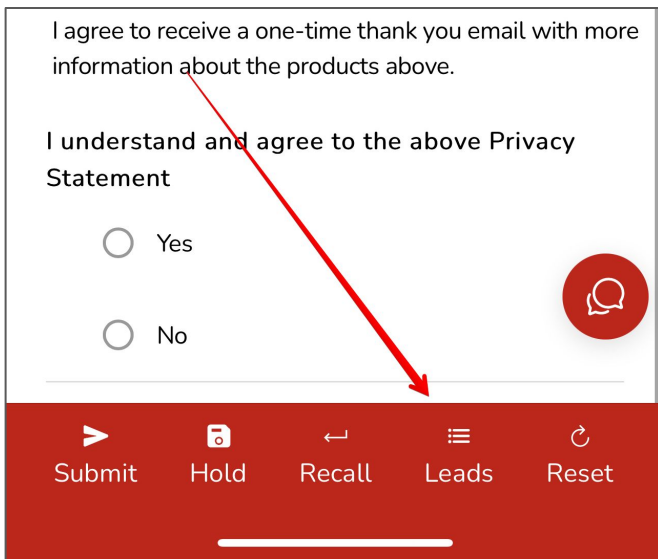
Your form may include a library of digital documents. You can share these documents by selecting them during the lead capture process. If your form includes this feature, you will see a Document Button similar to the following:



Check the box beneath any document you would like to send. You can also download the documents to your device if you would like to use them as a visual aid. See our full documentation for more on uploading and sending documents.

Reviewing Submissions

You can review your submissions in real time in the Leads menu. To access the Leads menu, select the Leads option from the Event menu or click the Lead button in the form menu.



To view or edit a submission, simply tap on the lead's name. Depending on your permissions, you may not be able to see all of the leads from the event. Check with your account administrator to confirm your access.