Lanyon Smarter Solutions for Meetings, Events & Travel.

Dreamforce 2016 – Lead Retrieval & Salesforce Integration User Guide

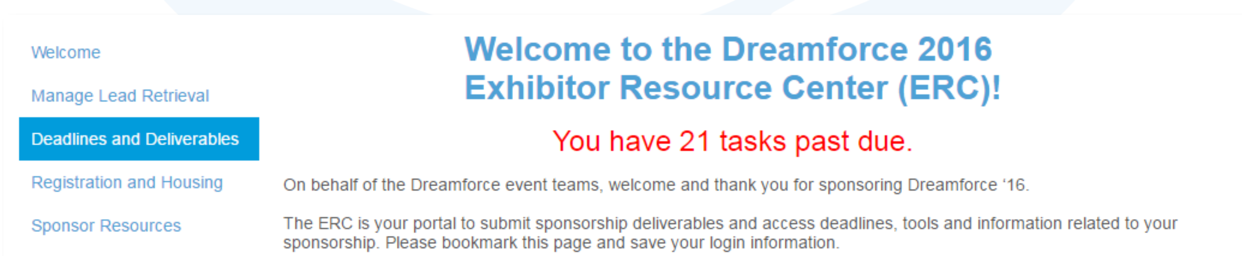
Thank you for selecting to use our Lanyon Mobile Lead Retrieval at Salesforce Dreamforce 2016. We're looking forward to helping you realize the full potential of your leads.

When you arrive at the event, come to the Lead Retrieval Service Desk located in the expo hall with your event badge to pick up your lead retrieval device(s). If you have any questions regarding lead retrieval anytime during the show, you can email us at eventsupport@lanyon.com or come by the Lead Retrieval Service Deck. This guide covers the following topics:

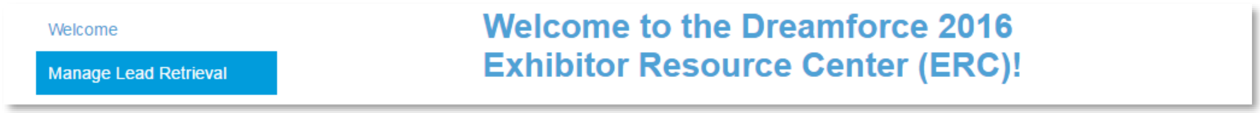
Contents

Set Up Your Exhibitor Salesforce.com Instance

Since your scanned leads will flow directly into your Salesforce instance, we recommend setting up your exhibitor salesforce integration before the show begins. Note, you must have already purchased a Lead Retrieval device via the ERC and must have selected the Lead Salesforce integration. If not, login to the Exhibitor Resource Center (ERC) and click on **Deadlines and Deliverables**, scroll down to the **Expo and Booth Tasks section**, and complete the **"Order/Setup Lead Retrieval Devices/Questions task"**.



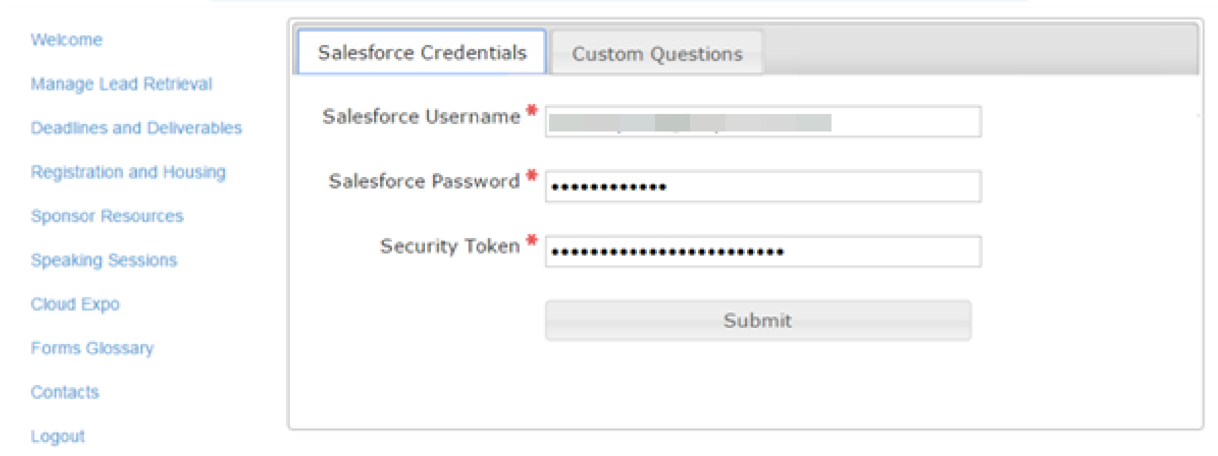
Step 1: Select Manage Lead Retrieval from the left navigation bar.



Step 2: Under the **Salesforce Credentials** tab, enter the credentials for your Salesforce instance.

NOTE: If you do not have the proper user permissions to read and edit your Salesforce instance, please contact your company's Salesforce administrator to provide them to you or to assist in setting this up in the ERC.

Your security token should have been emailed to you when your account was created at Salesforce.com. If you need a new token, log into Salesforce; Click on your name in the upper right; Pick "My Settings", expand "Personal" in the left navigation bar; and Select "Reset My Security Token". Your security token will be reset and the new token will be emailed to you.

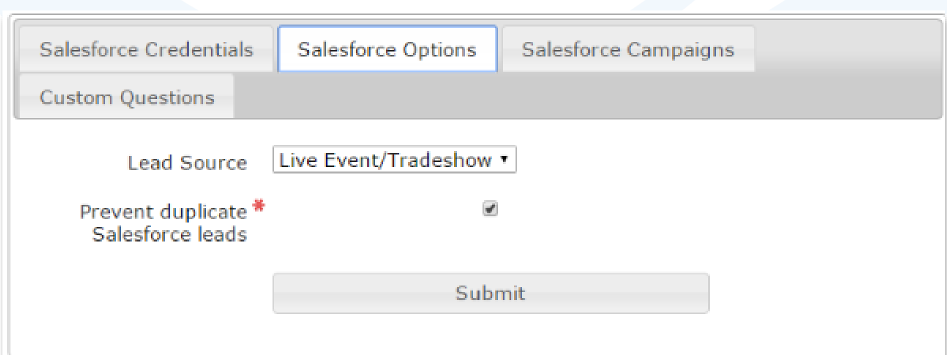


Step 3: Once authenticated, new tabs will appear in the Exhibitor Resource Center. Click on the **Salesforce Options** tab and select your **Lead Source** from the dropdown menu. To eliminate duplicate leads in your Salesforce instance, click on **Prevent duplicate Salesforce leads**, which will search for the scanned leads and contacts by email address before adding the lead to Salesforce.

For leads scanned more than once, Salesforce will automatically append any text field data to the original lead record and default drop down field values to the most recent entry. Since the ERC lead report will capture each scan separately, original notes and field values are retained for future reference.

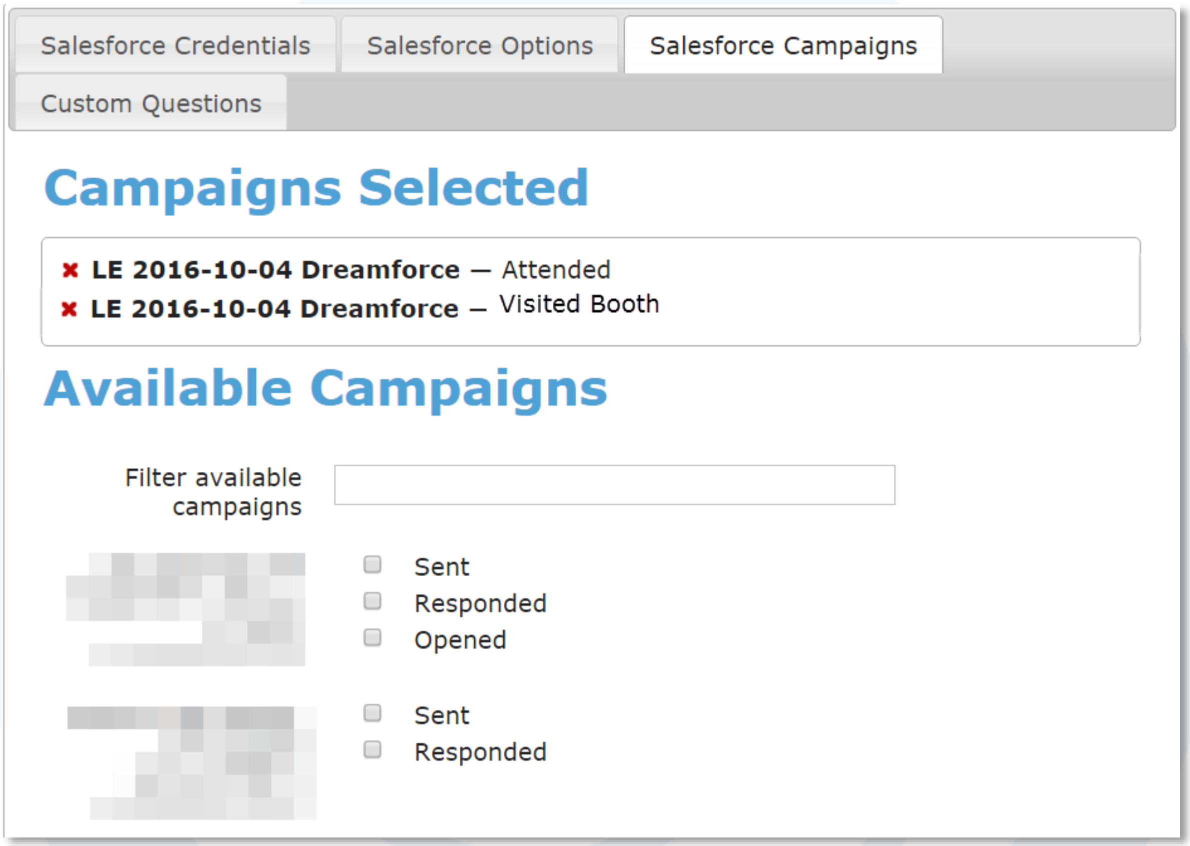
Click **Submit** to save your changes and click the **Salesforce Campaigns** tab to continue your configuration.

NOTE: Once you make your dedup selection and begin scanning leads, you'll be unable to make any changes to this particular function.



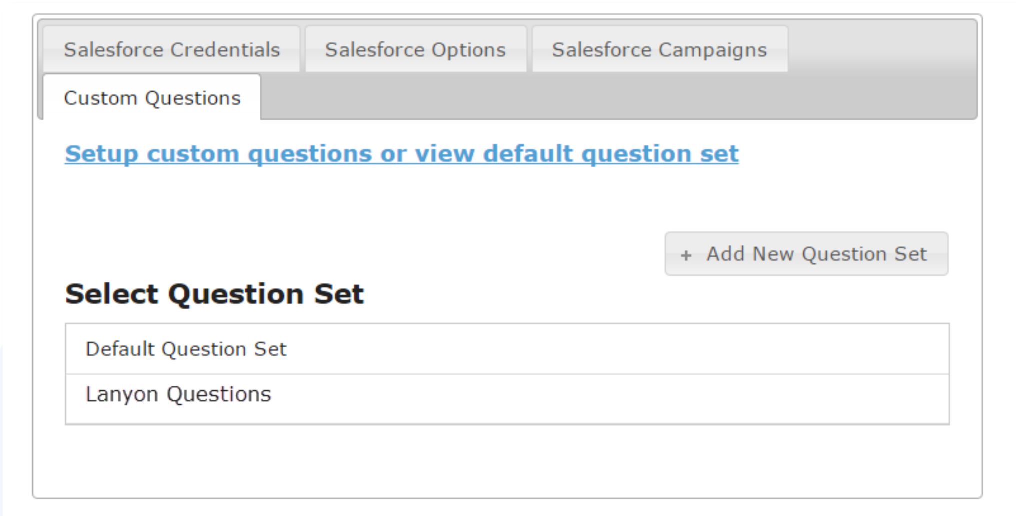
Step 4: On the **Salesforce Campaigns** tab, a list of available campaigns will be available – to select campaign(s), click on the campaign member status(es) that you want assigned to your leads, and those will appear under the **Campaigns Selected** header. You can also add a search term in the **Filter available campaigns** bar to quickly find a specific campaign. With each badge you scan with lead retrieval, the lead will be tagged with the campaign and member status from the one(s) that you select here. If you select more than one campaign during the set up, you can then configure your lead retrieval device(s) to select from the list of campaigns anytime onsite.

Note: You will need to create campaign(s) and member status(es) you'd like to use for this event in your Salesforce instance before you can complete this step. If you have not created the desired campaign(s) yet in your instance of Salesforce, please contact someone from your organization who can set that up for you.

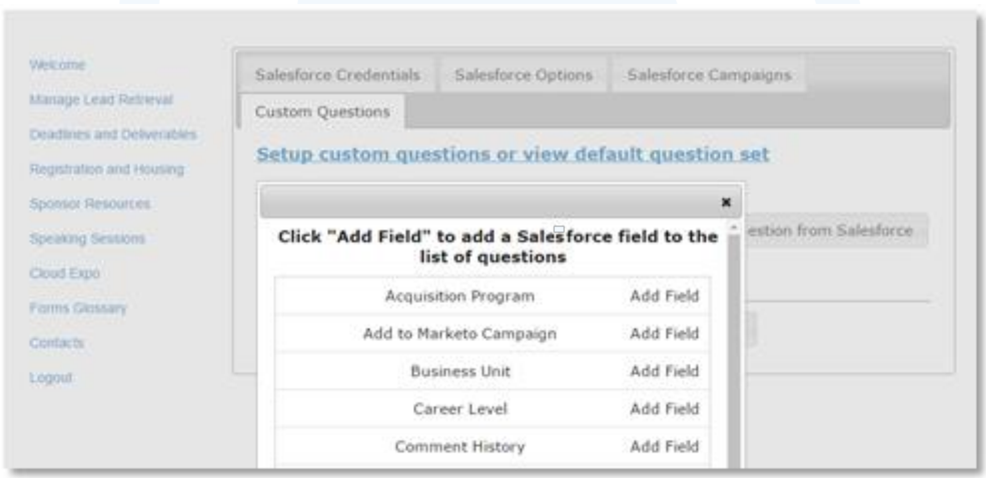


Step 5: On the **Custom Questions** tab, you can import fields from the **Lead Object** of your Salesforce instance directly into to your lead retrieval device. You're able to create different questions sets and assign them to different lead retrieval devices based on the context. For example, one set of questions for the booth while another for an evening event.

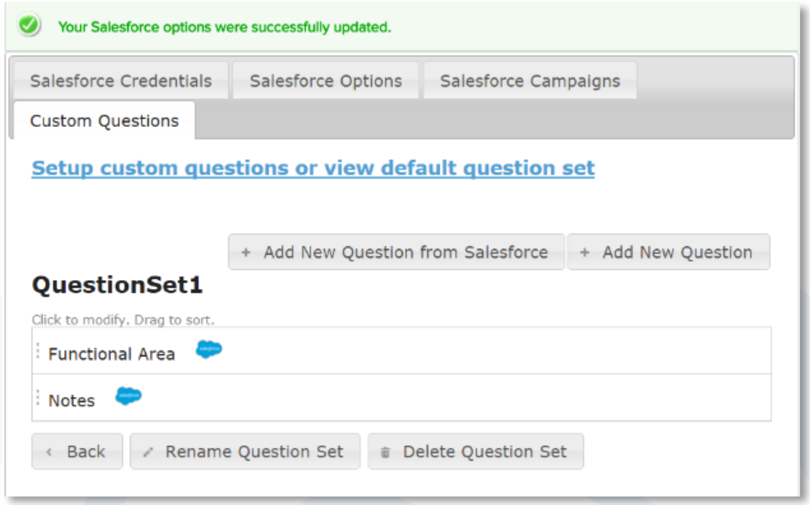
Click **Add New Question Set** to create a new custom question set.



Then click **Add New Question from Salesforce** to view a list of the fields from your Salesforce instance.

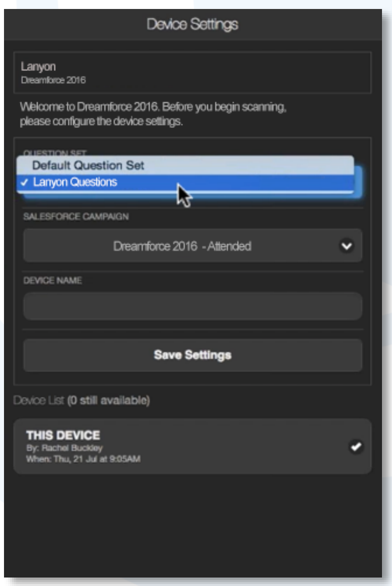


Click on the fields you'd like to use, and they will be brought into this question set. These imported questions **cannot be edited** (changed text or values) via the ERC and must be done via your Salesforce instance.



If you have purchased **Custom Questions** with your lead package, you will also be able to click on **Add New Question** to enter your own custom questions and mix them in with the Salesforce questions. While these Custom Questions will not sync to your Salesforce instance, responses will be captured and available in your ERC lead report.

Once you've finished with these steps, you are done configuring your lead retrieval experience. You will be able to assign a question set and campaign to each lead retrieval device at the event, and you can change question sets and add campaigns on your device at any time during the event.



At Dreamforce - Getting Started

Set Up Your Lead Retrieval Device

1. Turn on the Samsung™ device by pressing the side button.
2. On the home screen, tap the **Lanyon Leads** icon to launch the application.
3. To close the application, press the **Home** button.

Capture Leads

1. To scan a badge, tap the back of the device to the badge.

- A badge is successfully scanned when the device vibrates or you a hear a tone.
- The **Lead View** page displays the contact information for the person you just scanned.

Add Notes

1. Tap the **Notes** area to add notes to the contact.
2. If you have qualifying questions, record responses by tapping on the question.
3. Tap **Done** or scan the next badge to finish editing the lead.

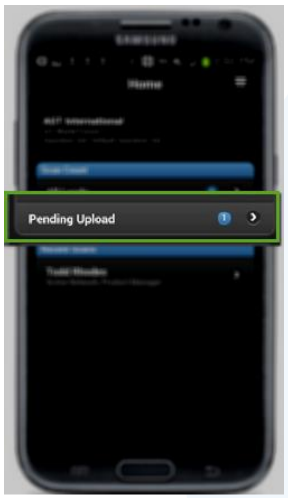
View & Edit Leads on the Lead Retrieval Device

1. Go to the **Home** screen.
2. Under **Scan Count**, tap on **All Leads** options. A list of the last 100 contacts scanned will be displayed.

- Scroll and click on the lead you want to edit.
- Add notes and edit responses.

Upload and View Leads

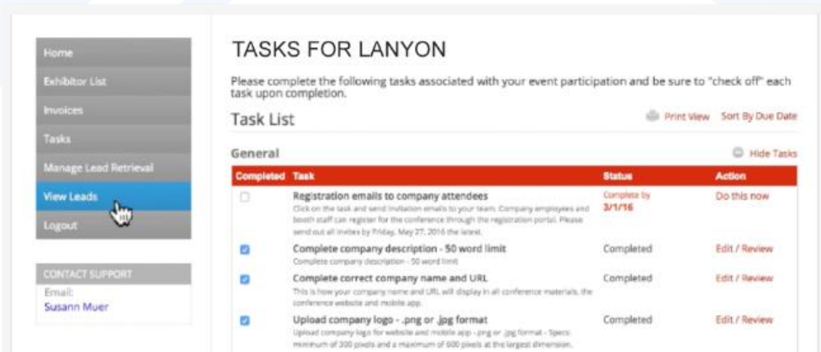
Upload Leads



Scanned sales leads are automatically uploaded to your leads dashboard in the **Exhibitor Resource Center** portal. The **Pending Upload** number shows the number of scanned leads not yet uploaded.

To manually upload leads to your leads dashboard, tap **Pending Upload.**

Access Your Leads Dashboard via the Exhibitor Resource Center Portal



1. In a web browser, go to the **Exhibitor Resource Center** web site:

https://dreamforceevents.com/2016/exhibitor/login.do

2. Enter your user name and password. (If you need this name and password, contact your company's booth owner who prepared your booth for the event.)
3. After you log in, click **View Leads** to view your leads report.
4. If you want to export your leads to a spreadsheet, click **Export**.

Shut Down the Unit

1. Close the Leads application by pressing the **Home** button.
2. Hold the power button, and follow the prompts to turn off the device.

Reminder: Charge the phone for the next day.