

# ***LEADLink Plus!***

## User Guide



**Contents**

Introduction ..... 3  
Install *LEADLink Plus!* ..... 4  
Set Up *LEADLink Plus!* ..... 7  
    Set Up Your Drivers ..... 7  
    Set up Your COM Port .....10  
Administrator Pre-Show Tasks .....17  
    Administrator Mode .....17  
    Name your Show's Database.....18  
    Customize Your Show Data Using AdminLink .....20  
        Show .....20  
        Qualifiers.....22  
        Products.....25  
        Survey Questions .....28  
At-Show Procedures .....33  
    Connecting the Device to the PC.....33  
    Scan Your Leads .....39  
    Qualify Your Leads.....41  
    Additional Information .....43  
    Export Your Leads .....47  
Appendix .....51  
    Pre-Show Checklist.....51  
    Determining Your Operating System .....52  
    Release Code.....54  
    Changing Your Port Setting (Advanced) .....55  
Document Information.....60

## Introduction

With *LEADLink Plus!* you control how you capture and qualify your sales leads. You can edit your prospect's contact information, add notes to your prospect's record, and qualify your prospects as extensively as you want.

You can customize the software so prospects can be qualified in just a few seconds or with in-depth survey, qualification, and product interest questions.

You don't have to be a software expert to customize *LEADLink Plus!*. The software comes with pre-set standard qualifiers, and most customization can be set up within minutes.

This user guide will be your reference every step of the way – from installation and set-up through customization and data export.

## Install *LEADLink Plus!*

This section will walk you through the steps to install *LEADLink Plus!* on your PC.

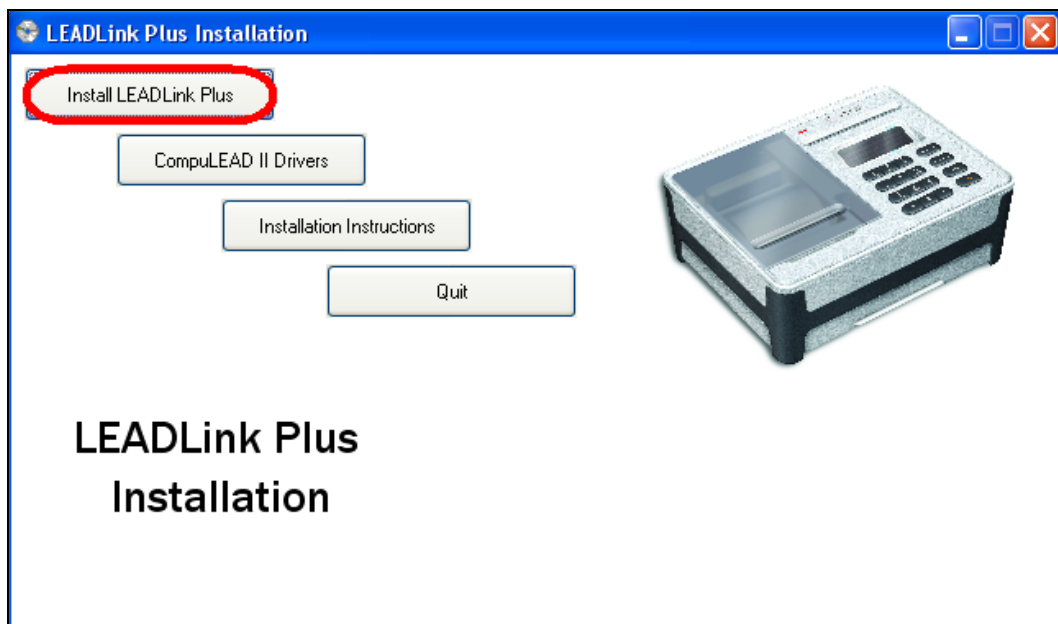
**Note:** Compatible with Vista **32-bit version only** (*not compatible with Vista 64-bit version*).

### Procedure:

1. Insert the *LEADLink Plus!* CD into the CD-ROM drive of the PC you'll be using at the show. (If your PC prompts you, select the option to run the software on the CD-ROM drive.) You might need to click on the icon to view the installation screen.



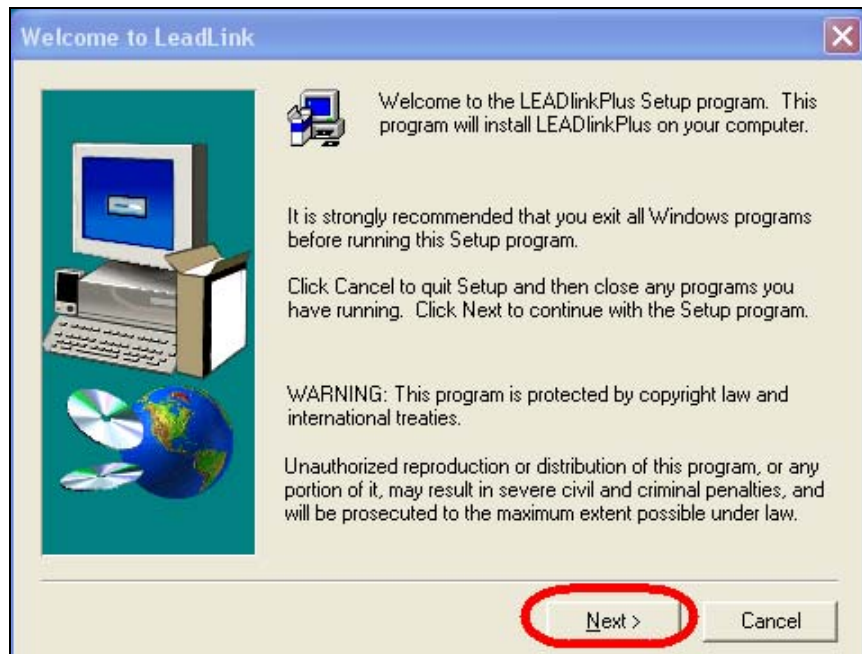
2. On the installation screen, click on the **[Install LEADLink Plus]** icon.



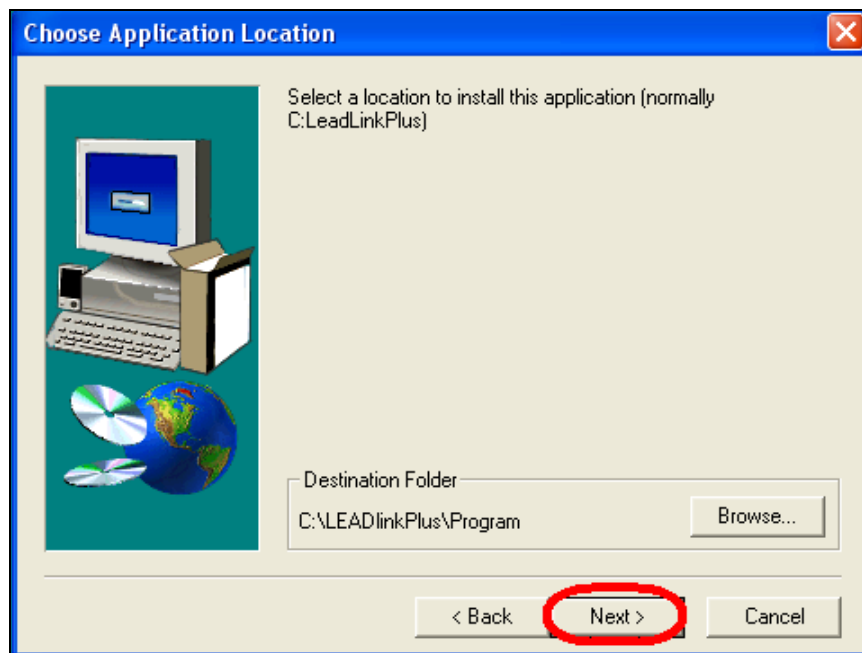
3. Depending on your PC's security configuration, you might need to grant the Setup.exe file access to your PC. Allow it access. *This may occur throughout the installation/set-up procedure.*

## LEADLink Plus! User Guide

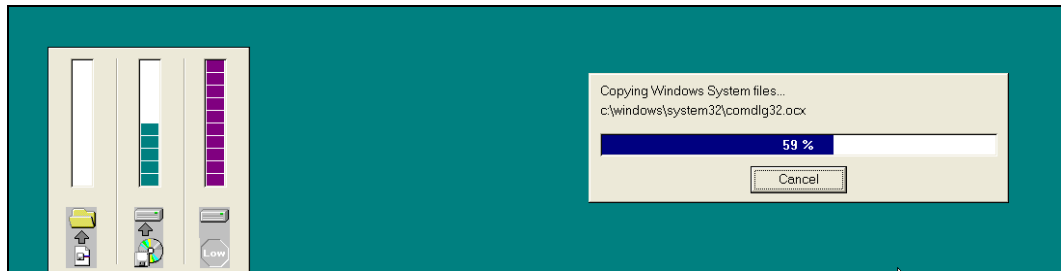
4. You'll see the Welcome to LEADLink screen. Click on **[Next >]** to continue.



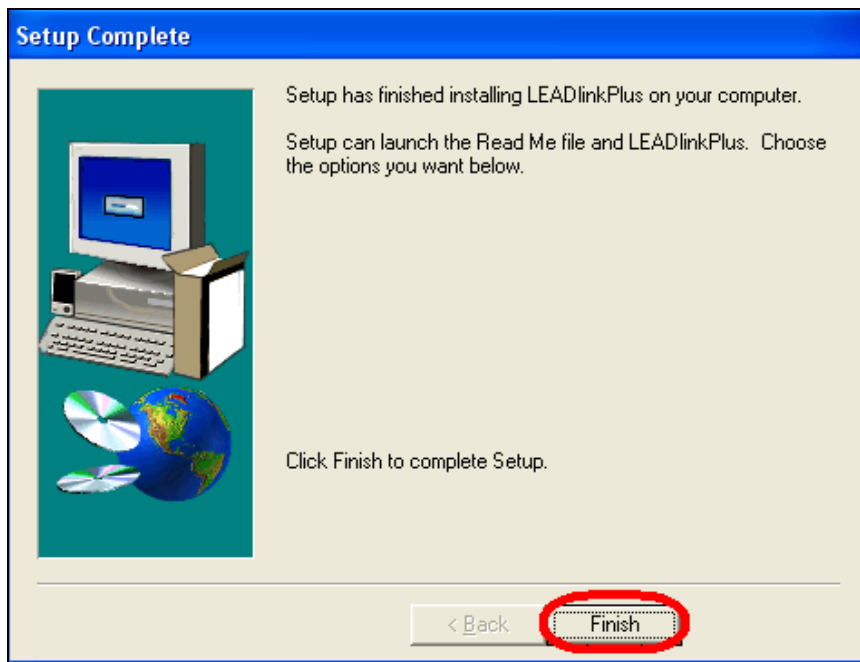
5. You're prompted to select a location on your PC where you'd like *LEADLink Plus!* installed. Click on **[Next >]** to choose the default folder.



A progress meter will appear showing the progress of the installation (it's very fast!).



6. When the installation has reached 100%, you'll see the following screen. Click on **[Finish]** to complete the procedure.



You'll now see a **[LEADlinkPlus]** icon on your desktop.



You are now ready to set up the parameters you'll be using with *LEADLink Plus!*. The next section will walk you through the necessary steps.

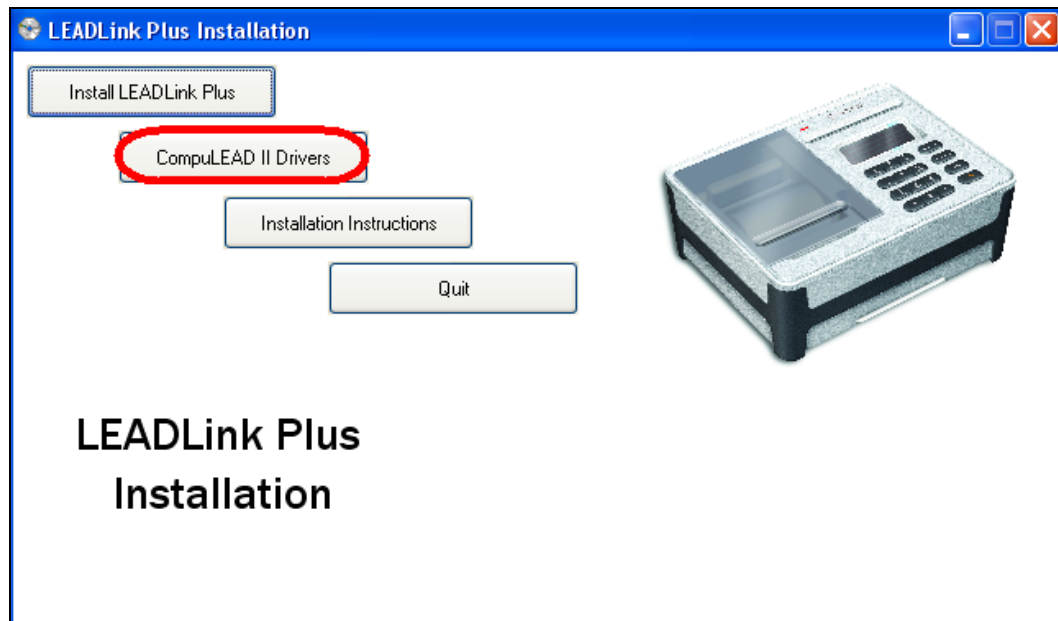
## Set Up *LEADLink Plus!*

In this section, you'll walk through the steps needed to set up the parameters you'll be using with the *LEADLink Plus!* application.

### *Set Up Your Drivers*

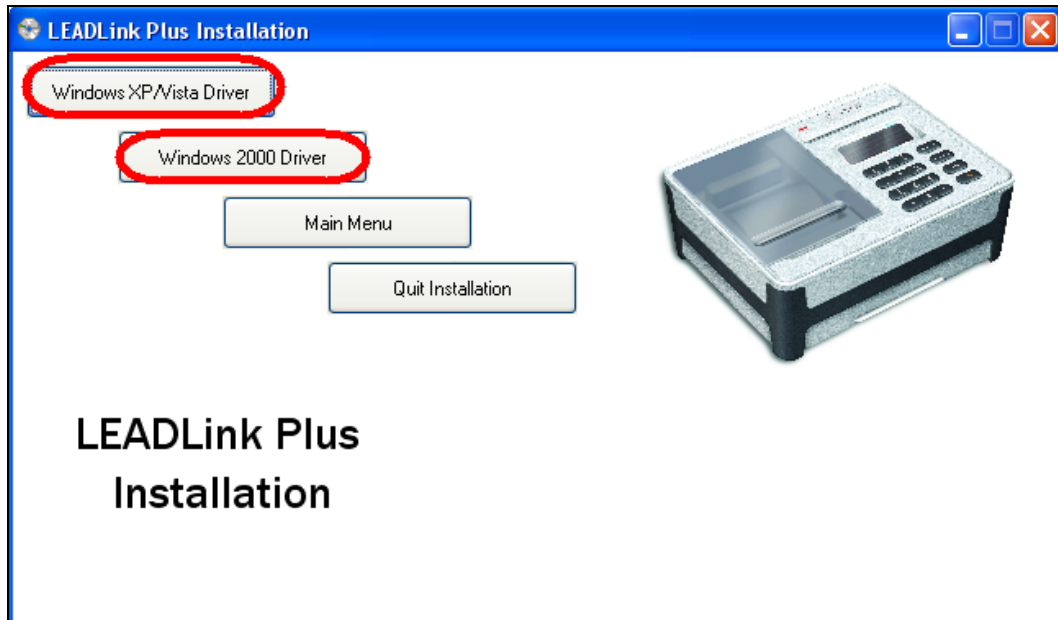
**Procedure:**

1. On the installation screen, click on the [CompuLEAD II Drivers] icon.

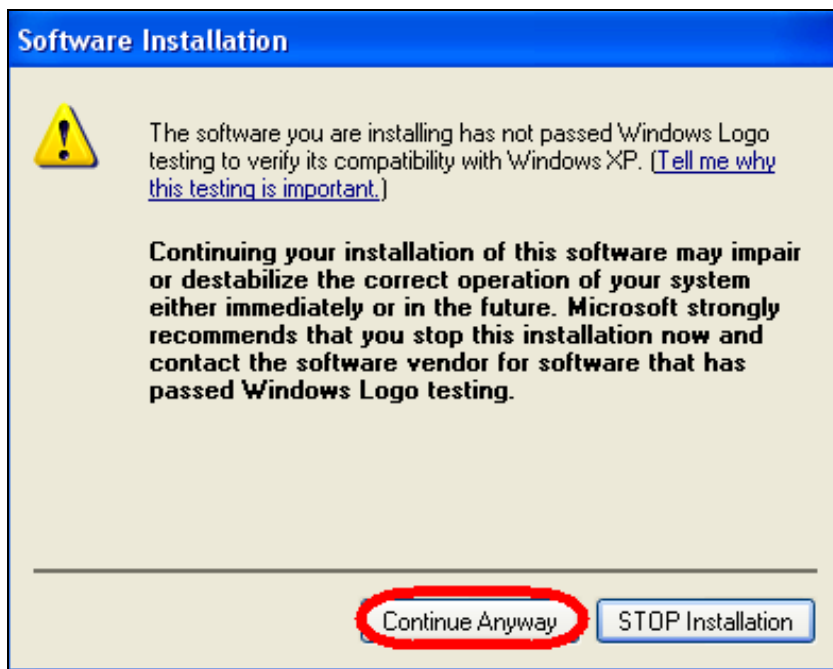


A new menu of options appears.

- From this new menu, select the option that matches the operating system on your PC. (If you're not sure, refer to "[Determining Your Operating System](#)" in the Appendix.) **Note:** Compatible with Vista **32-bit version only** (not compatible with Vista 64-bit version)



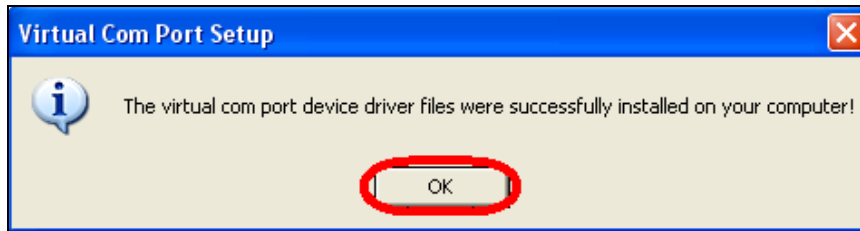
- Depending on your PC's configuration, you might receive a series of warning messages similar to the one shown below:



Click on **[Continue Anyway]** for each.

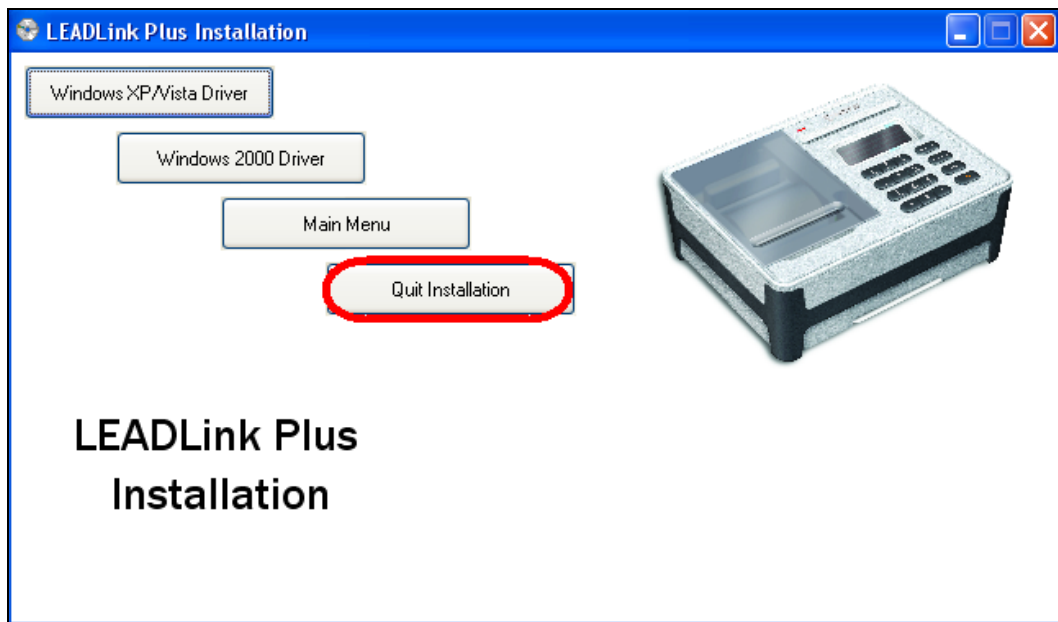


4. After the warning messages are over, you'll receive the following confirmation message:



Click on **[OK]** to complete the procedure.

5. On the LEADLink Plus Installation menu click on **[Quit Installation]** to complete the installation procedure.



You can now remove the installation CD from your CD-ROM drive

Now that you've set up your driver, you're ready to set up your COM port. To do so, please continue with the procedure that begins on the following page.

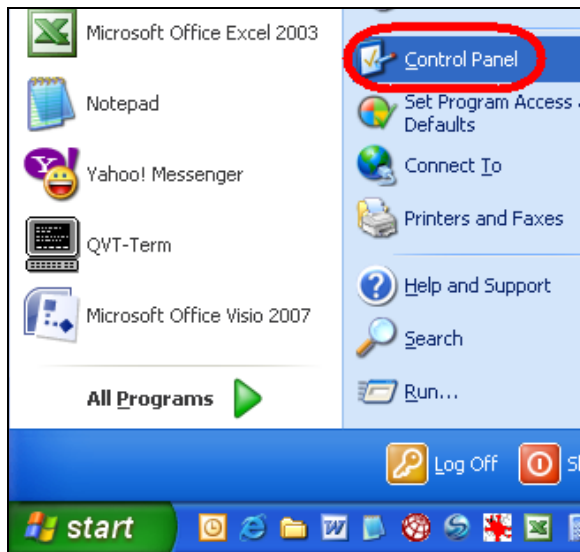
## Set up Your COM Port

### Procedure:

1. Click on your **[Start]** button.



2. From the items that appear, click on **[Control Panel]**.

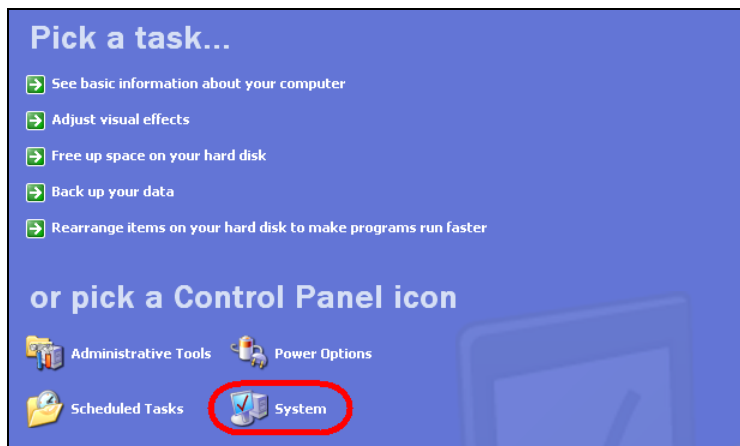


3. You have different options depending on whether your Control Panel is set to "Category" view or "Classic" view.

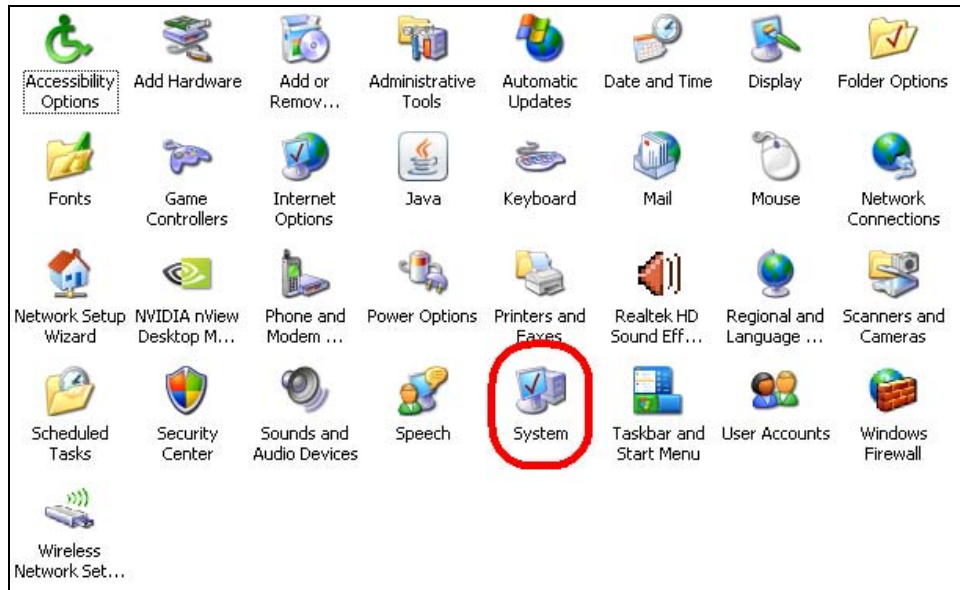
a. **For "Category" view...** Click on **[Performance and Maintenance]**.



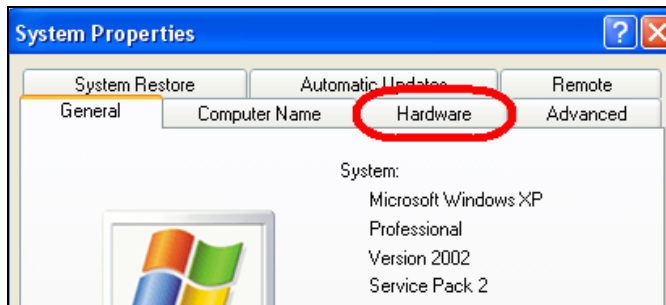
b. Next, click on **[System]**.



- c. **For "Classic" view...** From the Control Panel options, double-click on **[System]**.



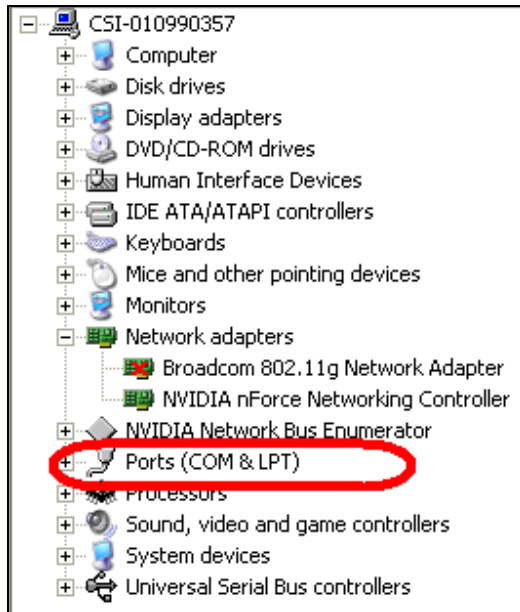
4. From the System Properties page, click on the **[Hardware]** tab. (If you're using Vista, click on *Advanced System Settings* to get to the *System Properties* page.)



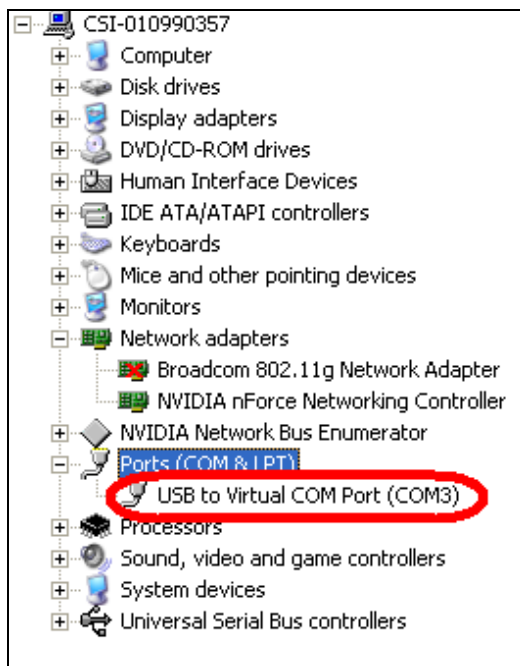
5. In the Hardware tab, click on the **[Device Manager]** button.



- From the Device Manager list, double-click on **[Ports (COM & LPT)]** to see its sub-values.



Among the ports listed, you'll see **[USB to Virtual COM Port (COM<x>)]** listed (where "<x>" will be the numbers 1, 2, 3, or 4.

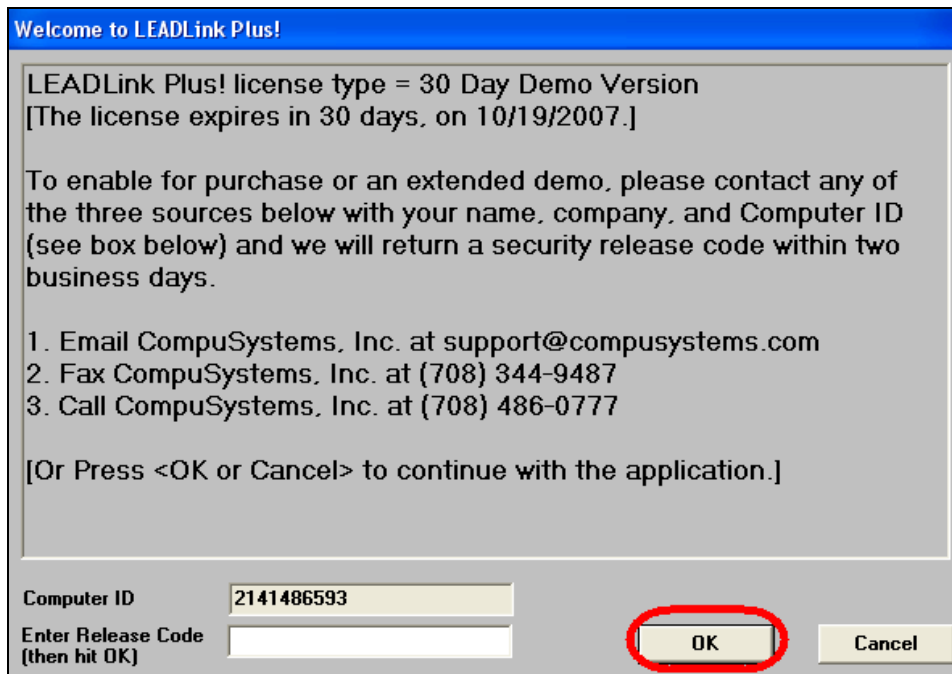


In this example, the PC has defaulted to **COM3**. You'll want to remember this for later. Close the Device Manager and Control Panel.

7. Start your *LEADLink Plus!* software by double-clicking the icon on your Desktop.

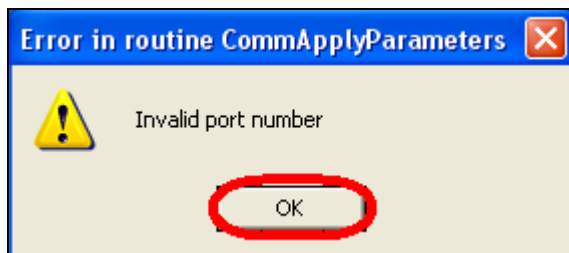


8. If you had a previous version of *LEADLink Plus!* application, you'll see a welcome screen. Notice the license expiration date; if this date has passed, you'll need to contact technical support in one of the ways noted on the screen.

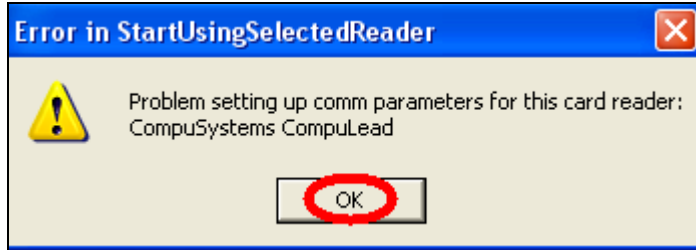


Once you receive the [Release Code](#), enter it in the Enter Release Code field then click on **[OK]**. (If you've never installed *LEADLink Plus!* on this PC, you won't see this screen.)

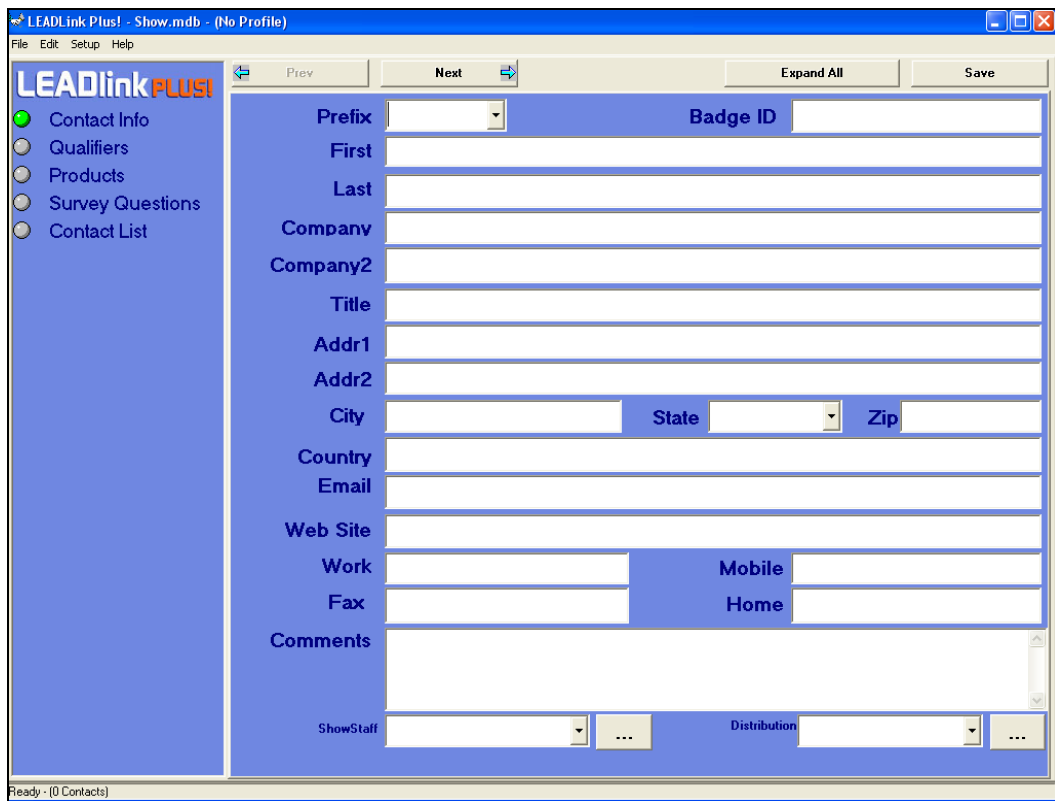
9. If your default COM port doesn't match what *LEADLink Plus!* is looking for, you'll get an error message. Click **[OK]**.



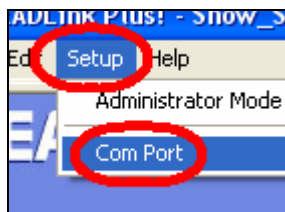
10. You'll get another error message. Click on **[OK]**. These two error messages may continue several more times; click on **[OK]** each time until the error messages stop.



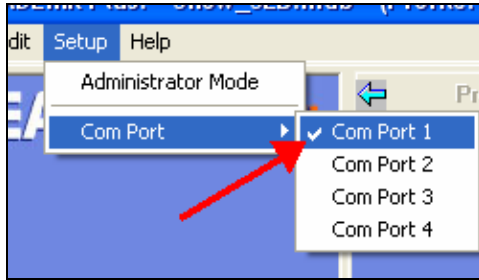
11. The main *LEADLink Plus!* screen appears.



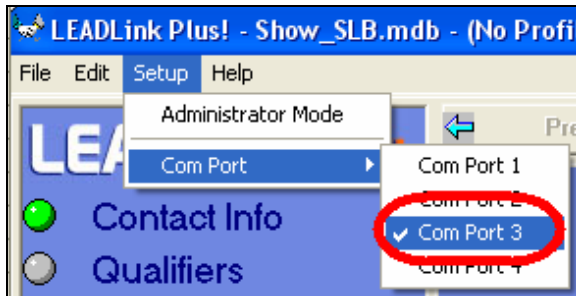
12. From the top menu bar, click on **[Setup]** then on **[Com Port]**.



13. Notice that **[Com Port 1]** is the default value.



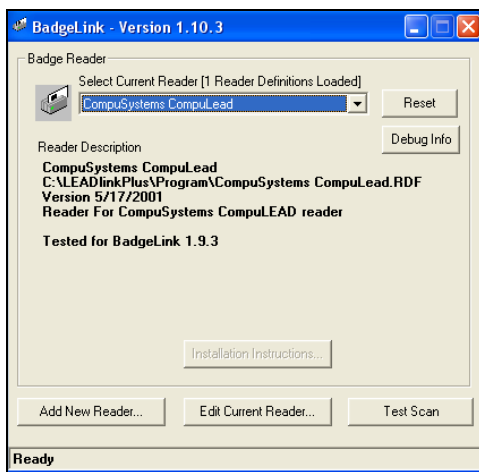
14. Remember the Com Port that you saw in the Device Manager screen (recall that the PC used in this example is set-up for **COM3**.) Click on that Com Port number in the drop-down list.



15. A new icon appears at the bottom of your display. Click on it.



This shows your BadgeLink application is set to read a CompuSystems CompuLEAD device. *Keep this application running during your session.*



You're now ready to perform the administrator pre-show tasks described in the next section. Please keep your *LEADLink Plus!* session running.



## Administrator Pre-Show Tasks

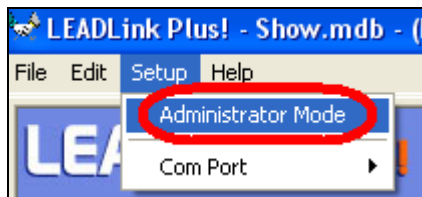
This section will walk you through the tasks you'll need to perform before the start of the show. These tasks will require that you sign into Administrator mode in the *LEADLink Plus!* application.

### *Administrator Mode*

To perform the steps listed in this section, you'll need to be in Administrator mode.

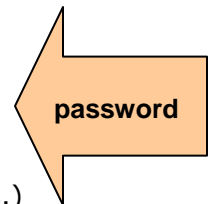
#### **Procedure:**

1. From the *LEADLink Plus!* menu bar, click on **[Setup]** then click on **[Administrator Mode]**.



2. In the password screen, enter your administrator password **csi** then click on **[OK]**.

(**Note:** This password is case-sensitive; be sure to use lower-case letters.)

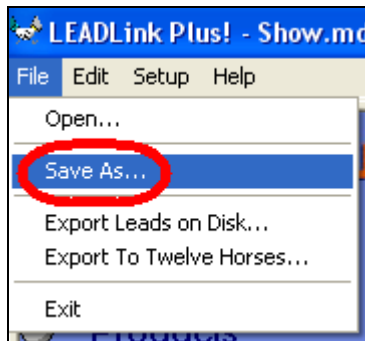


You are now in *Administrator Mode*. The menu bar will now show you the options you'll need to perform the pre-show tasks described in this section.

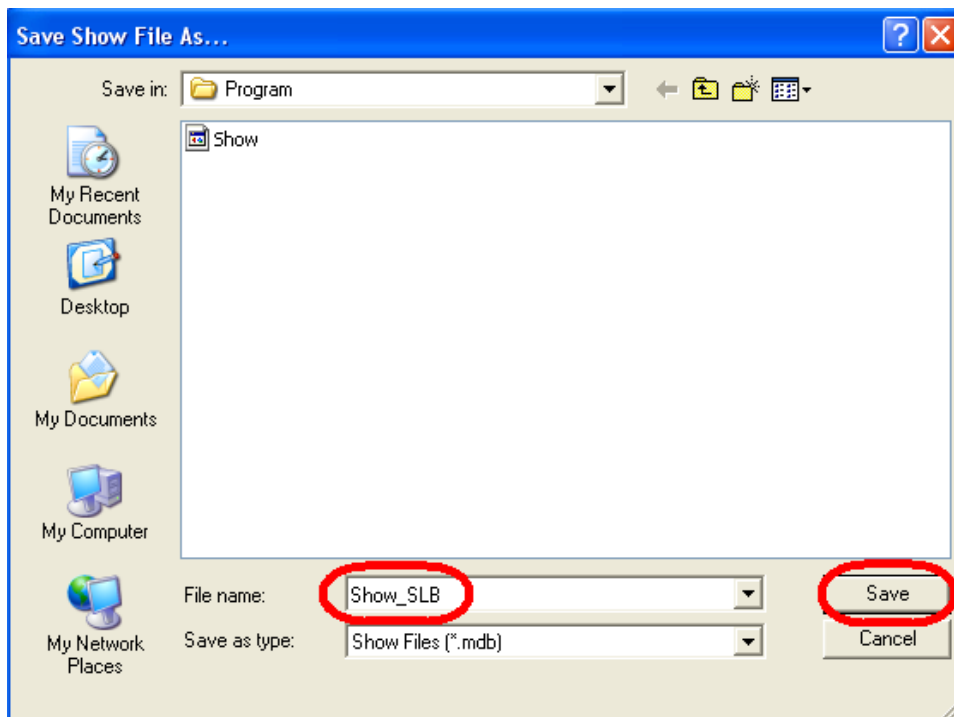
## Name your Show's Database

### Procedure:

1. From the menu bar, click on **[File]** then **[Save As...]**.



2. In the screen that appears, specify the name and file location of the database for your event then click on **[Save]**.



(By default, the file location for the database is **C:\LEADLink Plus\Program\**)

3. The show name you saved appears at the top of the *LEADLink Plus!* screen.



**Note:** This database (Show\_SLB.mdb) will now become the default database every time you start the *LEADLink Plus!* application.

Please remain in Administrator mode for the next section.

## Customize Your Show Data Using AdminLink

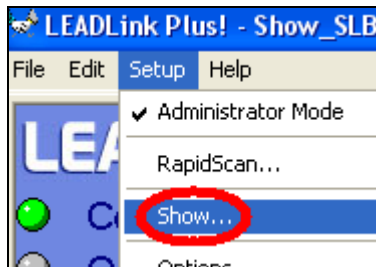
The AdminLink screen lets you customize the categories that you previously set up using [RapidScan](#). It is available to you in Administrator Mode. The link to this screen is listed in the **[Setup]** menu under **[Show...]** (which is the first parameter you'll be customizing.)

### Show

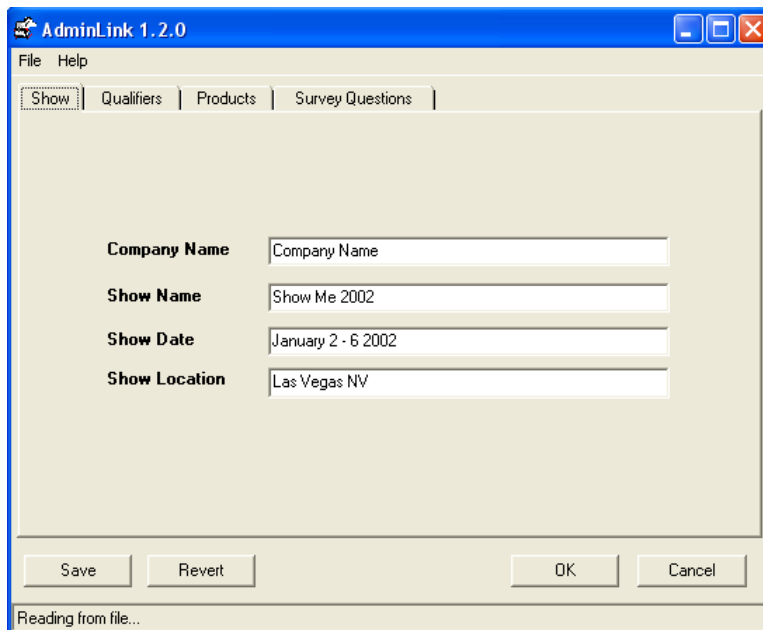
The Show tab lets you establish the basic information regarding the show from which you're gathering leads.

#### **Procedure:**

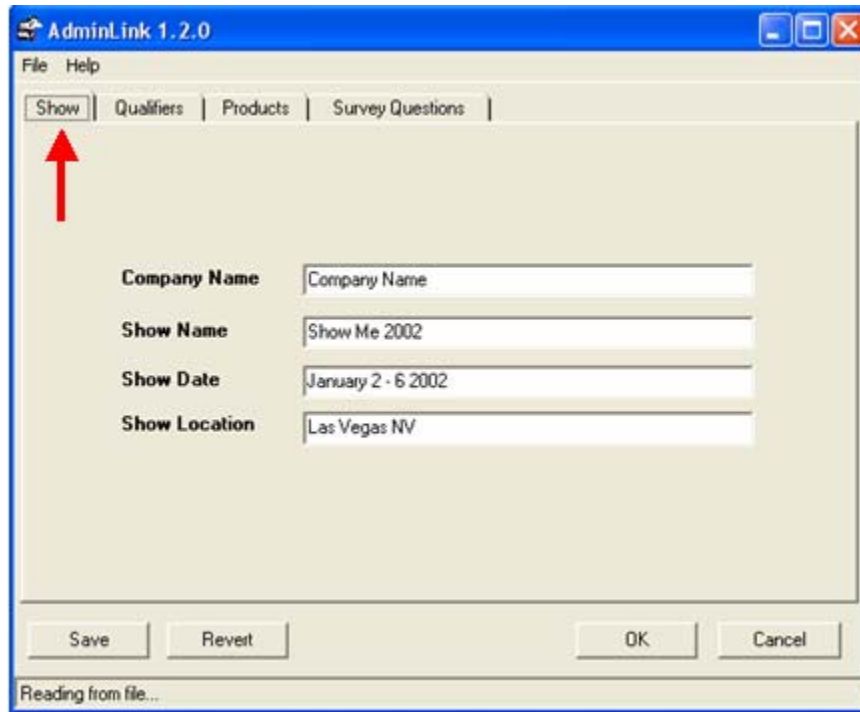
1. In the menu bar, click on **[Setup]** then **[Show...]**.



The AdminLink screen will appear:



2. In the AdminLink screen, notice that the Show tab is displayed by default. Other tabs are: Qualifiers, Products, and Survey Questions. You'll use these other tabs later.



3. For this discussion, enter the following values in the applicable fields:
  1. Company Name: **Acme, Inc.**
  2. Show Name: **Road Runner Expo**
  3. Show Date: **January 9 – 15 2008**
  4. Show Location: **Chicago IL**
4. Click on **[Save]**.

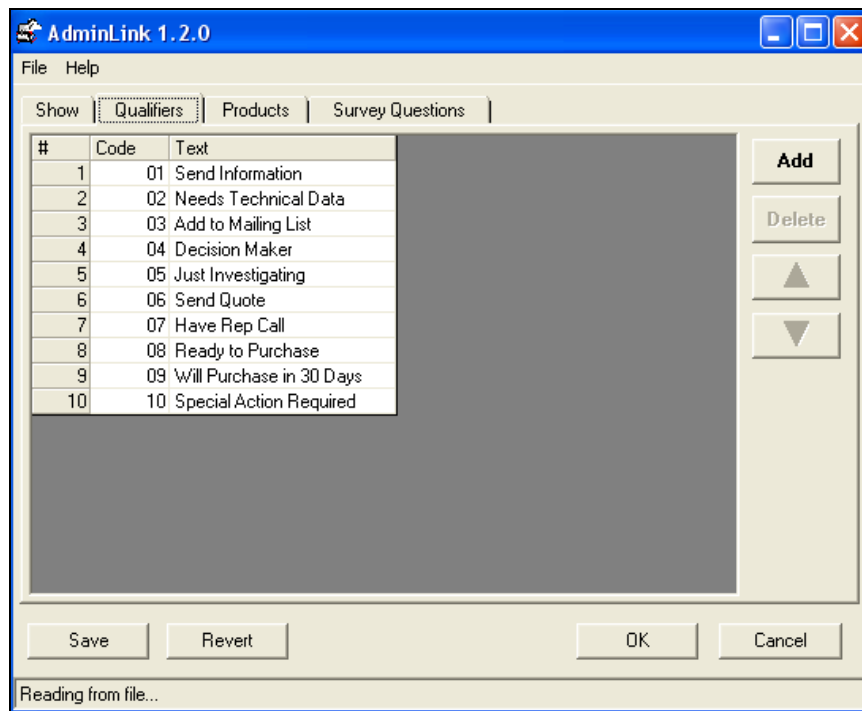
In the next section, you'll work in the Qualifiers tab.

## Qualifiers

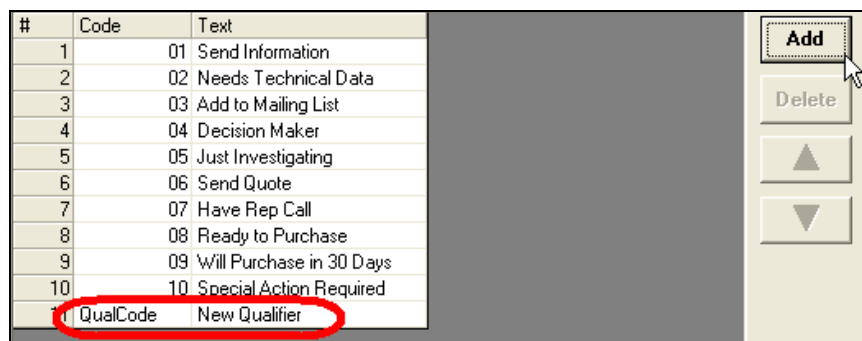
Qualifiers let you add helpful information to your prospect data and customize your post-show follow-up effort. You can use *LEADLink Plus!*'s 10 pre-set qualifiers or you can add as many custom qualifiers as you want such as "Send Free Sample," "Hot Lead," etc.

### Procedure:

1. In the AdminLink screen, click on the Qualifiers tab. Notice the 10 pre-set qualifiers.



2. Review the pre-set qualifiers to determine whether they meet your needs.
3. **To add a qualifier...** Click on [Add]. A new line appears.



## LEADLink Plus! User Guide

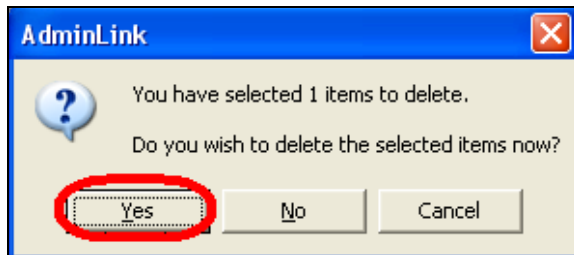
Overwrite the Code and Text fields with the appropriate information, for example, **11** and **Schedule Meeting ASAP**.

10	10	Special Action Required
11	11	Schedule Meeting ASAP

4. **To delete a qualifier...** Click on the qualifier that you want to delete, then click on **[Delete]**.

#	Code	Text	
1	01	Send Information	Add
2	02	Needs Technical Data	Delete
3	03	Add to Mailing List	▲
4	04	Decision Maker	▼
5	05	Just Investigating	
6	06	Send Quote	
7	07	Have Rep Call	
8	08	Ready to Purchase	
9	09	Will Purchase in 30 Days	
10	10	Special Action Required	
11	11	Schedule Meeting ASAP	

On the screen that appears, click on **[Yes]** to complete the deletion.



## LEADLink Plus! User Guide

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5. **To edit a qualifier...** First click on any qualifier. All of the function keys on the right-hand side will become activated.

#	Code	Text	
1	01	Send Information	Add
2	02	Needs Technical Data	Delete
3	03	Add to Mailing List	▲
4	04	Decision Maker	▼
5	05	Just Investigating	
6	06	Send Quote	
7	07	Have Rep Call	
8	08	Ready to Purchase	
9	09	Will Purchase in 30 Days	
10	10	Special Action Required	

- **Revise the Content:** Type over the code and/or text you want to change.
- **Move a Qualifier:** Click on the qualifier then click on either the Up or Down arrows. The default sort order is by # (shown in the left-most column).

6. When you're finished with your work click on **[Save]**.

In the next section, you'll work in the Products tab.

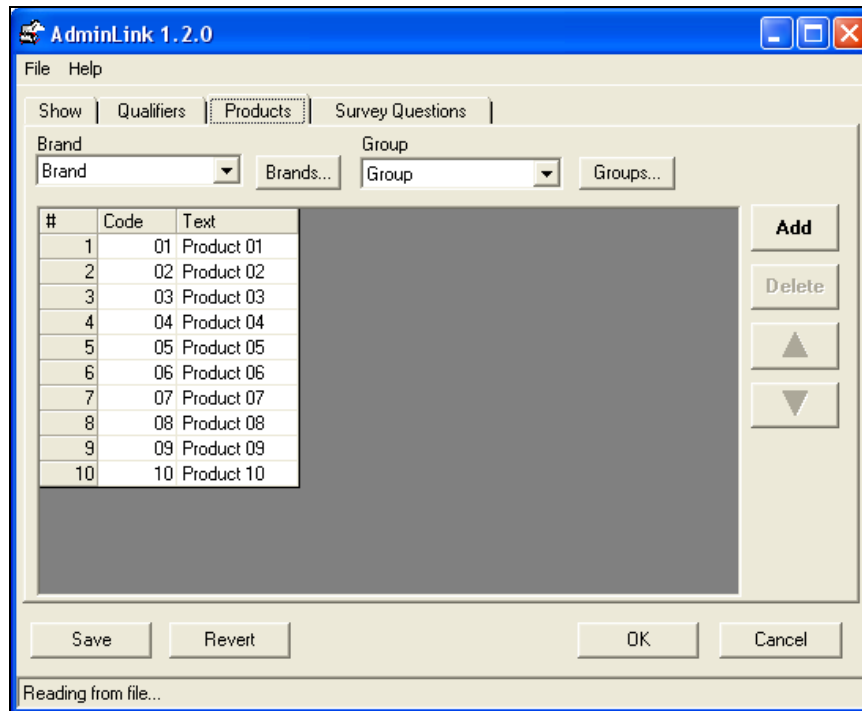


## Products

Products require set-up before they can be used effectively. (In the procedure below, note the generic "Product 01," "Product 02," etc. default values.) This section will help you set up your product line for a show.

### Procedure:

1. In the AdminLink screen, click on the Products tab.



2. Determine whether the number of products listed matches the number of products you want to use at the show.

3. **To add a product...** Click on **[Add]**. A new line appears.

#	Code	Text
1	01	Product 01
2	02	Product 02
3	03	Product 03
4	04	Product 04
5	05	Product 05
6	06	Product 06
7	07	Product 07
8	08	Product 08
9	09	Product 09
10	10	Product 10
11	New Product	New Product

Buttons: Add, Delete, Up Arrow, Down Arrow

Overwrite the Code and Text fields with the appropriate information.

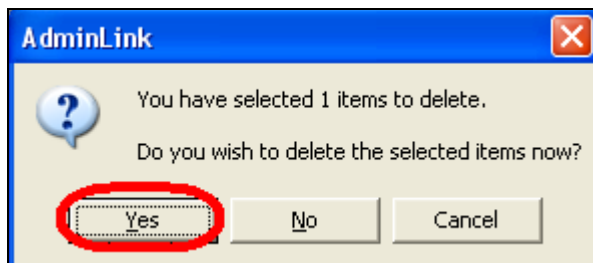
10	10	Product 10
11	Hoses	Hoses

4. **To delete a product...** Click on the product that you added, then click on **[Delete]**.

#	Code	Text
1	01	Product 01
2	02	Product 02
3	03	Product 03
4	04	Product 04
5	05	Product 05
6	06	Product 06
7	07	Product 07
8	08	Product 08
9	09	Product 09
10	10	Product 10
11	11	Hoses

Buttons: Add, Delete, Up Arrow, Down Arrow

On the screen that appears, click on **[Yes]** to complete the deletion.



5. **To edit a product...** First click on any product. All of the function keys on the right-hand side will become activated.

#	Code	Text	
1	01	Product 01	<b>Add</b>
2	02	Product 02	<b>Delete</b>
3	03	Product 03	▲
4	04	Product 04	▼
5	05	Product 05	
6	06	Product 06	
7	07	Product 07	
8	08	Product 08	
9	09	Product 09	
10	10	Product 10	

- a. **Revise the Content:** Type over the code and/or text you want to change.

#	Code	Text
1	01	Brake Pads
2	02	Tires
3	03	Wipers

- b. **Move a Product:** Click on the product then click on either the Up or Down arrows. The default sort is alphabetical based on each cell of the Text column.

#	Code	Text
1	02	Tires
2	01	Brake Pads
3	03	Wipers

6. When you're finished with your work click on **[Save]**.

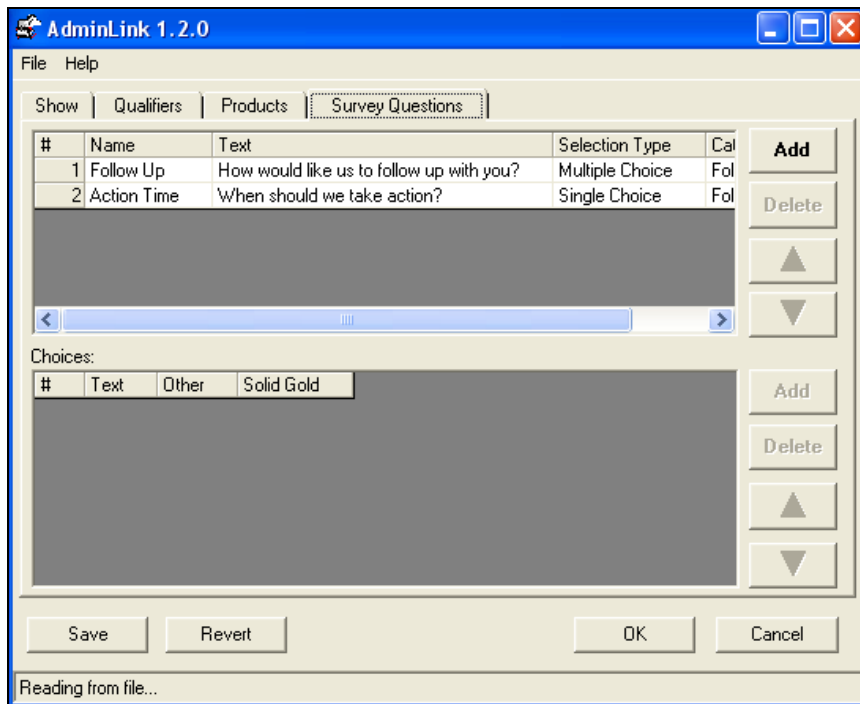
In the next section, you'll work in the Survey Questions tab.

## Survey Questions

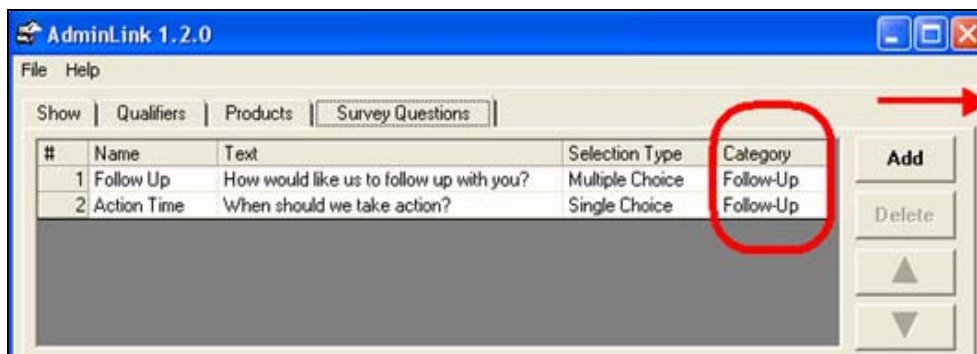
This section will help you obtain the best possible feedback from your contacts.

### Procedure:

1. In the AdminLink screen, click on the Survey Questions tab.



2. You can resize the screen by dragging the right-hand border to the right. This will let you see all of the data presented. (Notice that the Category column is now fully visible.)



3. Review the standard survey questions to determine whether they meet your needs.

4. **To add a survey question...** Click on **[Add]**. A new line appears.

#	Name	Text	Selection Type	Category	
1	Follow Up	How would like us to follow up with you?	Multiple Choice	Follow-Up	<input type="button" value="Add"/> <input type="button" value="Delete"/>
2	Action Time	When should we take action?	Single Choice	Follow-Up	
3	New Question	Description	Single Choice	Qualifier	

Overwrite the Name, Text, Selection Type, and Category fields with the appropriate information.

#	Name	Text	Selection Type	Category	
1	Follow Up	How would like us to follow up with you?	Multiple Choice	Follow-Up	<input type="button" value="Add"/> <input type="button" value="Delete"/>
2	Action Time	When should we take action?	Single Choice	Follow-Up	
3	Follow Up	Did you hear of CompuSystems before the sho	Single Choice	Follow-Up	

Note that the Selection Type and Category fields are available via drop-down list:

Did you hear of CompuSystems before the sho	Single Choice	Follow-Up
	Single Choice	
	Multiple Choice	

Did you hear of us before the show?	Single Choice	Qualifier
		Qualifier
		Follow-Up

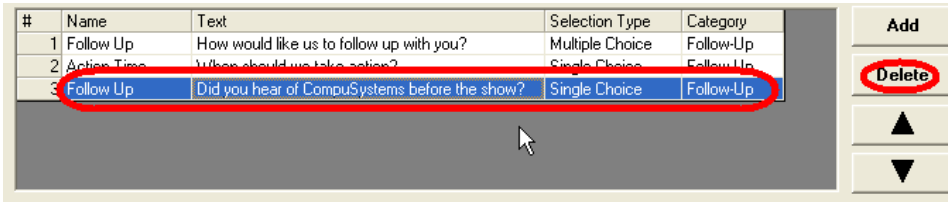
5. **To add responses to your survey question...** Click on the question to which you'd like to add responses, then click on **[Add]** in the Choices area.

Follow Up	Did you ever hear of CompuSystems before the show?	Single Choice	Qualifier	<input type="button" value="Delete"/> <input type="button" value="▲"/> <input type="button" value="▼"/>
Choices:				
#	Text	Other	Solid Gold	
				<input type="button" value="Add"/>

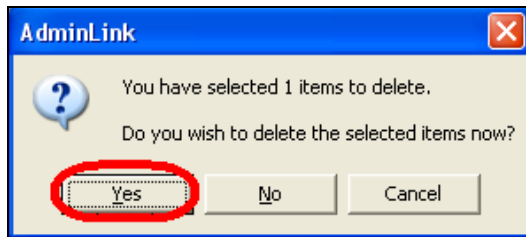
6. Overtyping the Text field with the appropriate choices. *Leave the Other and Solid Gold fields as is; these are for internal CompuSystems use.*

Choices:			
#	Text	Other	Solid Gold
1	Yes	No	No
2	No	No	No

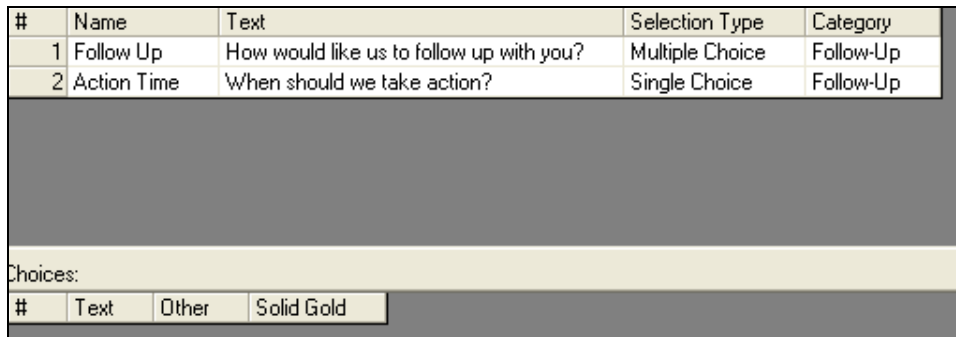
7. **To delete a survey question...** Click on the survey question that you added, then click on **[Delete]**.



On the screen that appears, click on **[Yes]** to complete the deletion.



Note that the survey question *as well as its choices* are deleted.



8. **To edit a survey question...** First click on any survey question. All of the function keys on the right-hand side will become activated.

#	Name	Text	Selection Type	Category	
1	Follow Up	How would like us to follow up with you?	Multiple Choice	Follow-Up	<b>Add</b>
2	Action Time	When should we take action?	Single Choice	Follow-Up	<b>Delete</b>
					▲
					▼

- a. **Revise the Content:** Type over the text you want to change.

#	Name	Text
1	Follow Up	How would like us to follow up with you?
2	Action Time	When should we follow up?

- b. **Edit the Responses:** Click on a question to see the choices for a response:

#	Name	Text
1	Follow Up	How would like us to follow up with
2	Action Time	When should we take action?

#	Text	Other	Solid Gold
1	Call me	No	No
2	Call for appointment	No	No
3	Send Literature	No	No
4	Mail List	No	No
5	Other	Yes	No

You can revise the text and move the choices – just as you did with the survey questions themselves using the **[Add]**, **[Delete]**, and up/down arrow options.

#	Text	Other	Solid Gold	
1	Call me	No	No	<b>Add</b>
2	Call for appointment	No	No	<b>Delete</b>
3	Send Literature	No	No	▲
4	Mail List	No	No	▼
5	Other	Yes	No	

- c. Move a Survey Question: Click on the survey question then click on either the Up or Down arrows. (The questions and responses are sorted by the # field.)

#	Name	Text	Selection Type	Category
1	Action Time	When should we follow up?	Single Choice	Follow-Up
2	Follow Up	How would like us to follow up with you?	Multiple Choice	Follow-Up

After you move a question, the questions are automatically renumbered.

9. When you're finished with your work click on **[Save]**.

At this point you can exit Admin Link by clicking on **[OK]**. This completes your pre-show procedures. In the next section, you'll be introduced to the procedures you'll perform at the show.



## At-Show Procedures

This section walks you through the procedures on how to connect your CompuLEAD device to your PC as well as how to scan badges, enhance your lead information, and export your leads to a spreadsheet.



### *Connecting the Device to the PC*

The following procedure will walk you through the steps needed to attach your CompuLEAD II Desktop Pro device to your PC.

#### **Procedure:**

1. Power your PC on and let it boot up.
2. Insert your *LEADLink Plus!* CD. You'll be pulling a driver for your CL2 device from it. **Note:** If the application starts automatically, please click on **[Quit]**.
3. On the CompuLEAD II Desktop Pro device (CL2), plug in the power cord and turn the power switch to the on position (with the "—" mark down and the "o" mark up).



The CL2's display area will show several different messages as the device boots up. When the device is ready, you'll see the message: **READY TO READ.**

4. Insert the squared end of the USB cable into the back of the CL2:



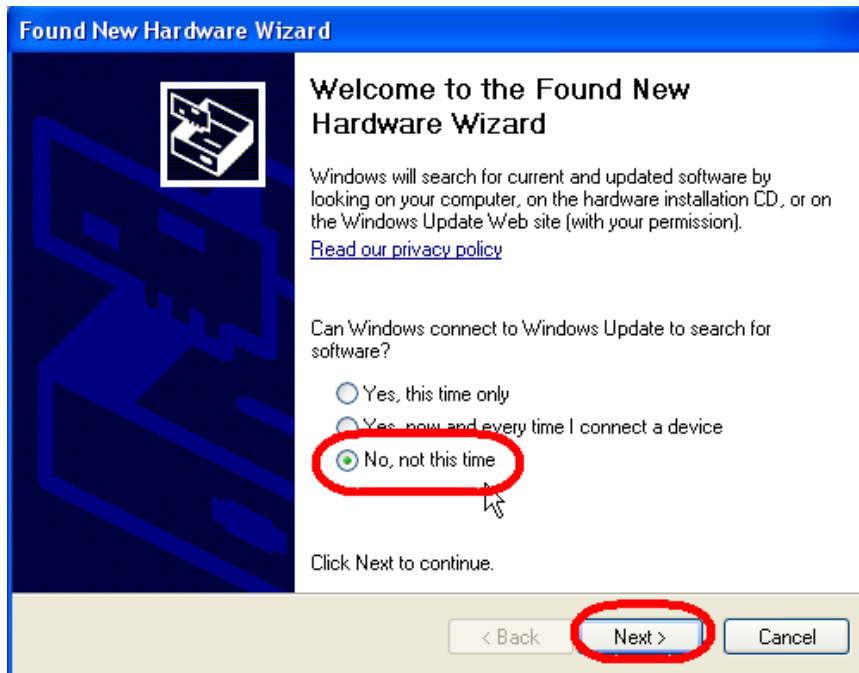
5. Then insert the flat end of the cable into a USB port on your PC:



6. You'll see the following message acknowledging the USB device.

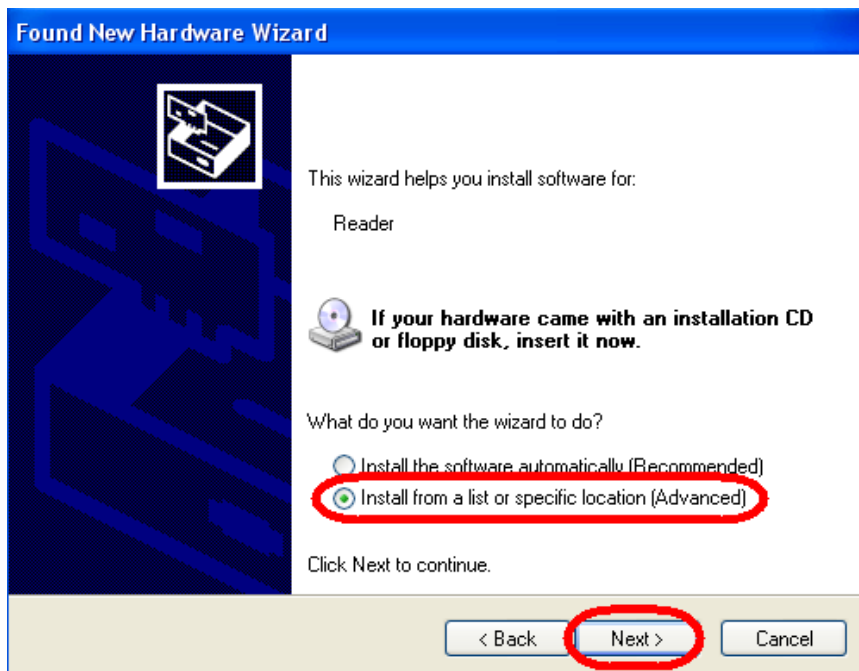


7. Wait until the Found New Hardware Wizard initializes.

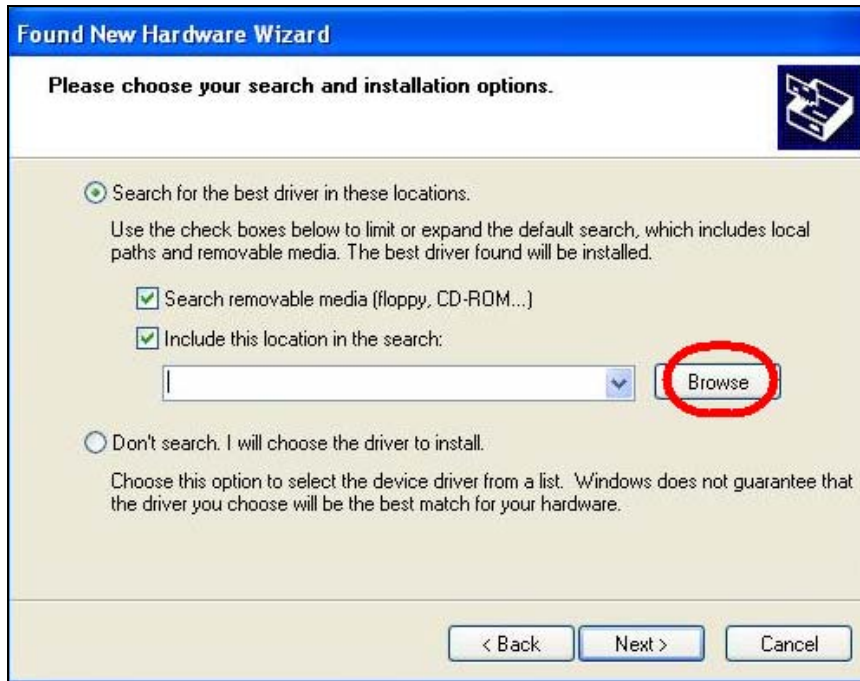


Click on **[No, not this time]** then click on **[Next]**.

8. Click on **[Install from a list or specific location (Advanced)]** then click on **[Next]**.



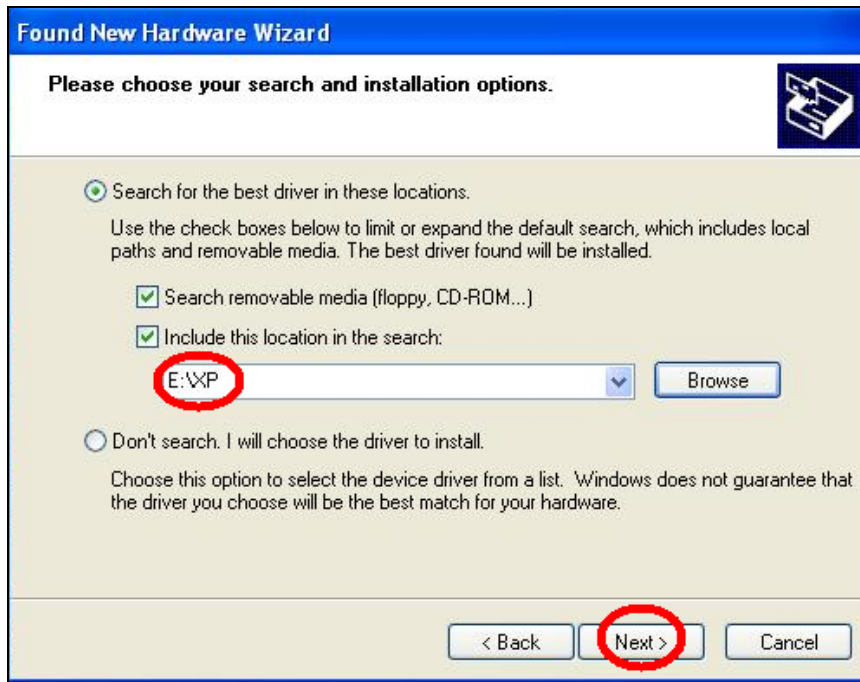
- Click on **[Search for the best driver in these locations]** and **[Include this location in the search]** then click on **[Browse]**.



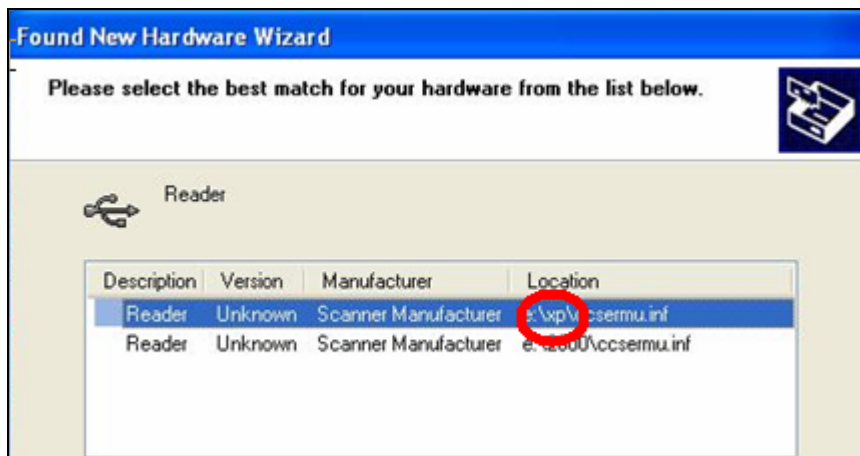
- Scroll to the CD-ROM directory, expand it to see its subdirectories, click on either **[2000]** if you're running Windows 2000 or **[XP]** if you're running either Windows XP or Vista **32-bit version only** (*not compatible with Vista 64-bit version*), then click on **[OK]**.



11. Notice that the directory you selected is now listed; click on **[Next]**.



12. Select the version of the driver that goes with your operating system (in this example, it's XP) then click on **[Next]**.



13. Click on **[Continue Anyway]** at the warning message.



14. Click on **[Finish]**.



You'll see a balloon that informs you the new hardware is found and ready to use. *LEADLink Plus!* is now ready to communicate with your CompuLEAD II Desktop Pro scanner.

## Scan Your Leads

### Procedure:

1. **Note:** To submit leads to your PC, you'll need to disable your scanner's print capabilities. Check your CompuLEAD II Desktop Pro device to determine whether it contains a paper roll by lifting the lid on the top left side of the unit. If you find a paper roll, remove it by lifting the blue latch and sliding the roll out.
2. Drop several sample badges into the slot located at the top right of the CompuLEAD device. Each time the CL2 successfully scans a badge, you'll hear a beep and see the lead data printed out. You'll also see the scanned data in the *LEADLink Plus!* Contact Info view.

Prefix	<input type="text"/>	Badge ID	36615332
First	John		
Last	Doe		
Company	Acme, Inc.		
Company2	<input type="text"/>		
Title	Sales Manager		
Addr1	123 Main Drive		
Addr2	Suite 445		
City	Hometown	State	IL <input type="text"/>
Zip	60000		
Country	United States		
Email	jdoe@acme.com		
Web Site	<input type="text"/>		
Work	(321) 555-1234	Mobile	<input type="text"/>
Fax	(321) 555-4321	Home	<input type="text"/>
Comments	<input type="text"/>		
ShowStaff	<input type="text"/>	...	Distribution <input type="text"/>

- To see a list of all the leads you scanned, click on **[Contact List]**.



Your leads are displayed:

BadgeNumber	First Name	Last Name	Company	Title
36615332	John	Doe	Acme, Inc.	Sale
36612345	Jane	Eod	Smith & Jones, Ltd.	VP S
36697864	Pat	Platt	Fat Cat Hats	Buye

- Double-click on any lead in the table to see that lead's Contact Info screen. For example, double-clicking on:



36615332	John	Doe	Acme
36612345	Jane	Eod	Smith
36697864	Pat	Platt	Fat

Gives you:

Prefix	<input type="text"/>	Badge ID	36612345
First	Jane		
Last	Eod		
Company	Smith & Jones, Ltd.		
Company2	<input type="text"/>		
Title	VP Sales		
Addr1	94949 Financial Place		
Addr2	Suite 100		
City	Metropolis	State	IL <input type="text"/>
Zip	66666		
Country	United States		
Email	jane.eod@sj.com		
Web Site	<input type="text"/>		
Work	(987) 555-4567	Mobile	<input type="text"/>
Fax	(987) 555-7654	Home	<input type="text"/>
Comments	<input type="text"/>		
ShowStaff	<input type="text"/>	...	Distribution <input type="text"/>

At this point you can continue to scan more leads, qualify your existing leads, or save your data. The next section will walk you through the procedure of qualifying your leads.



## Qualify Your Leads

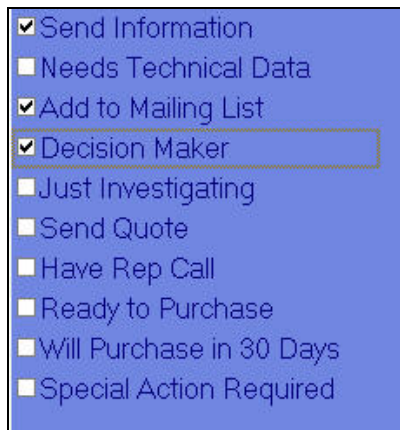
Qualifying your leads adds value to the information you're collecting.

### Procedure:

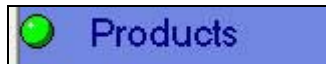
1. **To select qualifiers...** Click on the **[Qualifiers]** link in the left nav area.



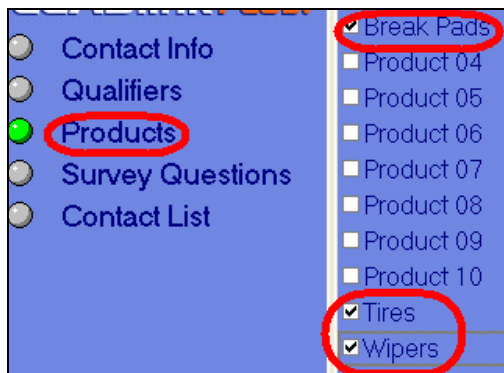
2. On the screen that appears, click the checkbox of each qualifier you want to use for this lead.



3. **To select products...** Click on the **[Products]** link in the left nav area.



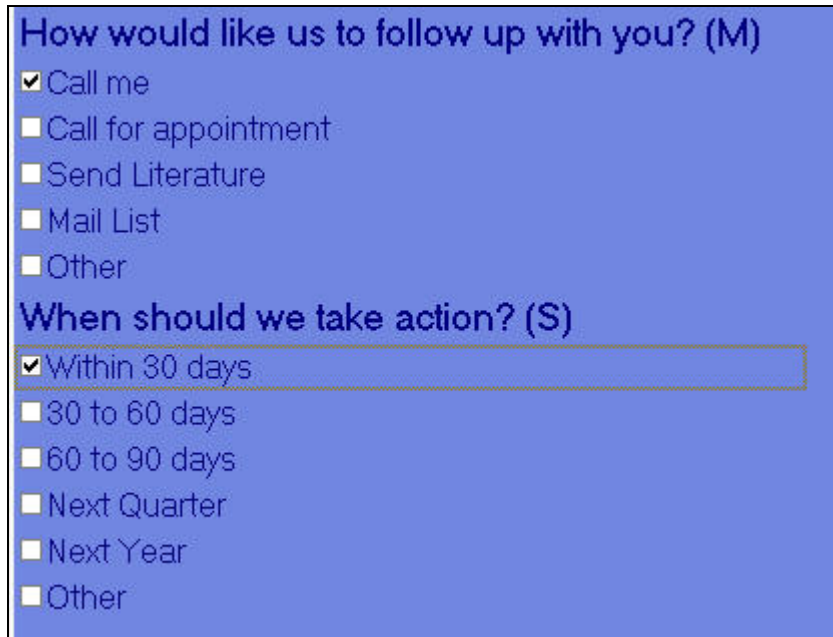
4. On the screen that appears, click the check box of each product you want to use for this lead.



5. **To select survey questions...** Click on the **[Survey Questions]** link in the left nav area.



6. On the screen that appears, click on the checkbox of each survey question you want to use for this lead.

A screenshot of a web form with a blue background. The form contains two sections of survey questions. The first section is titled "How would like us to follow up with you? (M)" and lists five options: "Call me" (checked), "Call for appointment", "Send Literature", "Mail List", and "Other". The second section is titled "When should we take action? (S)" and lists six options: "Within 30 days" (checked and highlighted with a dashed orange border), "30 to 60 days", "60 to 90 days", "Next Quarter", "Next Year", and "Other".

7. **To finish...** Click on **[Save]** to save your work.

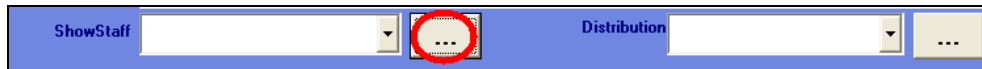


## Additional Information

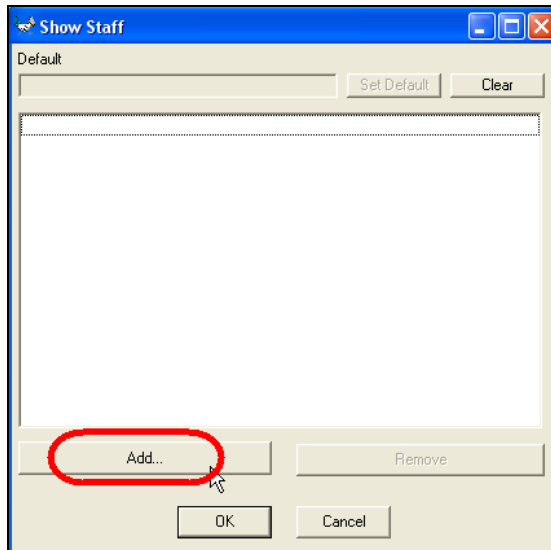
To complete your lead information, you can use the bottom fields on the Contact Information screen to identify who initially got the lead and to whom it should be distributed.

### Procedure:

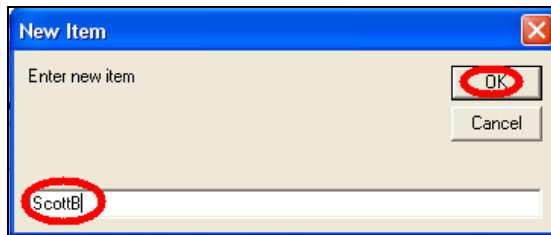
1. **To add Show Staff data ...** Click on the button next to the ShowStaff field.



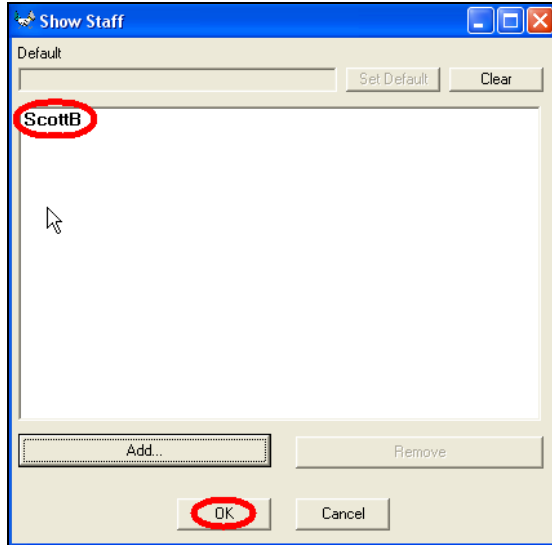
2. In the Show Staff screen, click on **[Add]**.



3. In the New Item screen, enter a show staff name then click on **[OK]**.



4. The name you added now appears on the Show Staff screen; click on **[OK]** to finish making additions.



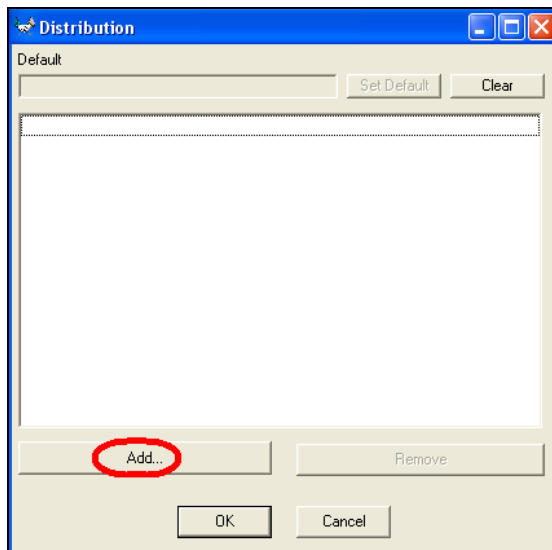
5. The name you added now appears in the drop-down list of the ShowStaff field.



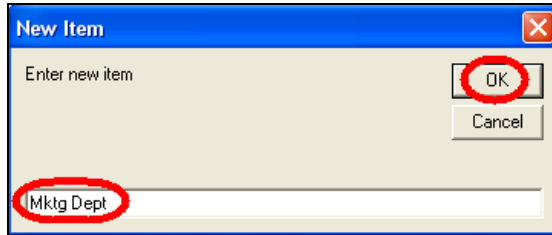
6. **To add Distribution data ...** Click on the button next to the Distribution field.



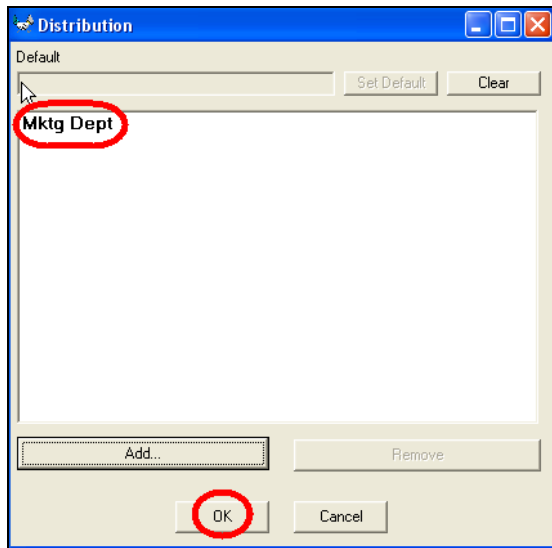
In the Show Staff screen, click on **[Add]**.



7. In the New Item screen, enter a show staff name then click on [OK].



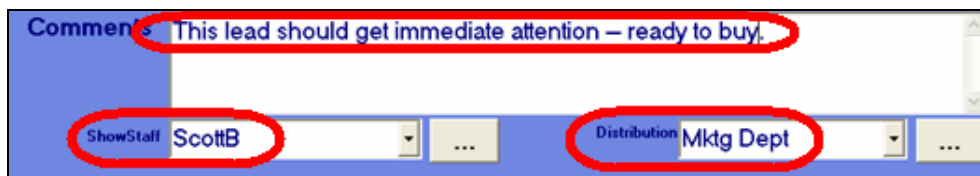
8. The name you added now appears on the Show Staff screen; click on [OK] to finish making additions.



9. The name you added now appears in the drop-down list of the ShowStaff field.



10. You can now select this information from each drop-down list and add a comment.



## LEADLink Plus! User Guide

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11. This information will appear on the Excel spreadsheet when you export your data. (Exporting data is covered in the next section.)

V	W	X	Y
C:Note	C:Show Staff	C:DateCreated	C:Distribution
This lead should get immediate attention -- ready to buy	ScottB	10/1/2007 15:53	Mktg Dept

12. *To finish...* Click on **[Save]** to save your work.



Now that you've qualified your leads, you can export them to a spreadsheet. How to do this is discussed in the next section.

*Please keep your LEADLink Plus! session running for the next section.*

## Export Your Leads

LEADLink Plus! lets you start following up on your leads the same day you get them. You can export your leads to a disk or flash memory drive in a CSV format for easy importing into your contact management software.

Each exported lead will contain the following:

- Full contact information (provided by the registrant on the registration form)
- Your notes (if provided)
- Show staff name (if used)
- Distribution data (if used)
- Your selected qualifiers, survey question answers, and products

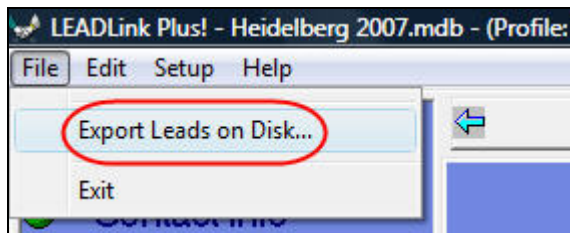
(Data import instructions for many popular software products, such as ACT!, Excel, Word, Goldmine, and Lotus are available on our website:  
[www.compusystems.com/dataimport.htm](http://www.compusystems.com/dataimport.htm))

### **Procedure:**

1. After you've qualified your leads, click on **[Contact List]** to verify that you've captured all of the leads you've scanned.

BadgeNumber	First Name	Last Name	Company	Title
36615332	John	Doe	Acme, Inc.	Sale
36612345	Jane	Eod	Smith & Jones, Ltd.	VP S
36697864	Pat	Platt	Fat Cat Hats	Buye

2. Click on **[File]** at the top left of the screen. A drop-down menu will appear.



From that menu, click on **[Export Leads on Disk...]**.

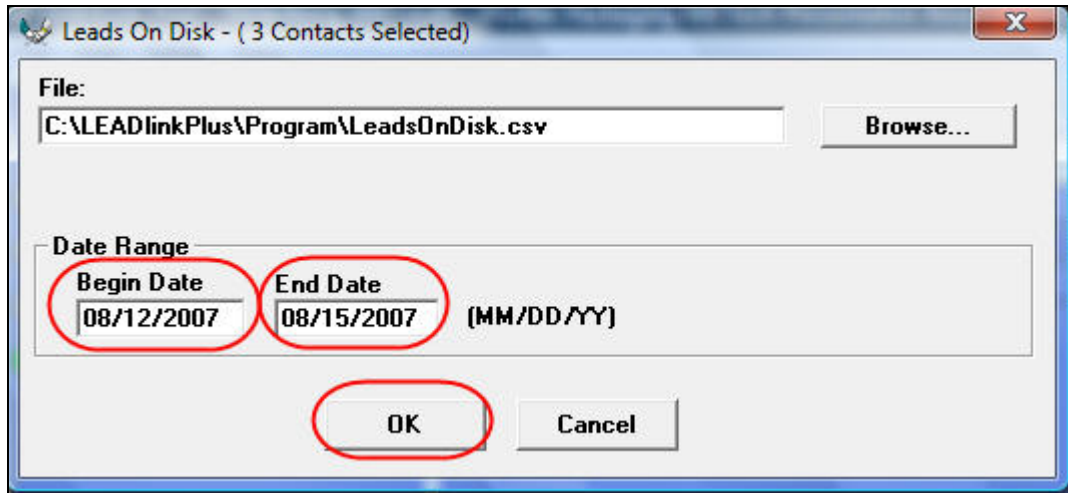
3. A Leads On Disk screen will appear. Notice the information supplied:

The screenshot shows a dialog box titled "Leads On Disk - ( 3 Contacts Selected)". It contains a "File:" field with the path "C:\LEADlinkPlus\Program\LeadsOnDisk.csv" and a "Browse..." button. Below this is a "Date Range" section with "Begin Date" and "End Date" fields, and a "(MM/DD/YY)" label. At the bottom are "OK" and "Cancel" buttons. Red circles highlight the title bar, the file path, and the date range fields.

It shows you have three leads, which confirms what you saw in step 2. It also shows that your leads will be saved in a file called **LeadsOnDisk.csv** located on your PC in the **C:\LEADLinkPlus\Program\** directory. For this example, we'll keep these values.



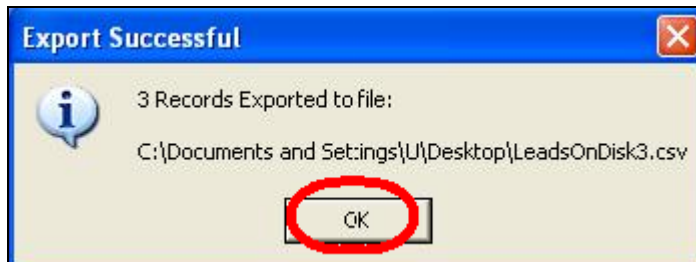
4. Supply a date range for your leads then click on **[OK]**.



The range supplied here covers the date on which the leads were taken, which was 08/14/2007. You can confirm this by clicking on **[Contact List]** then scrolling to the right until you see the date field.

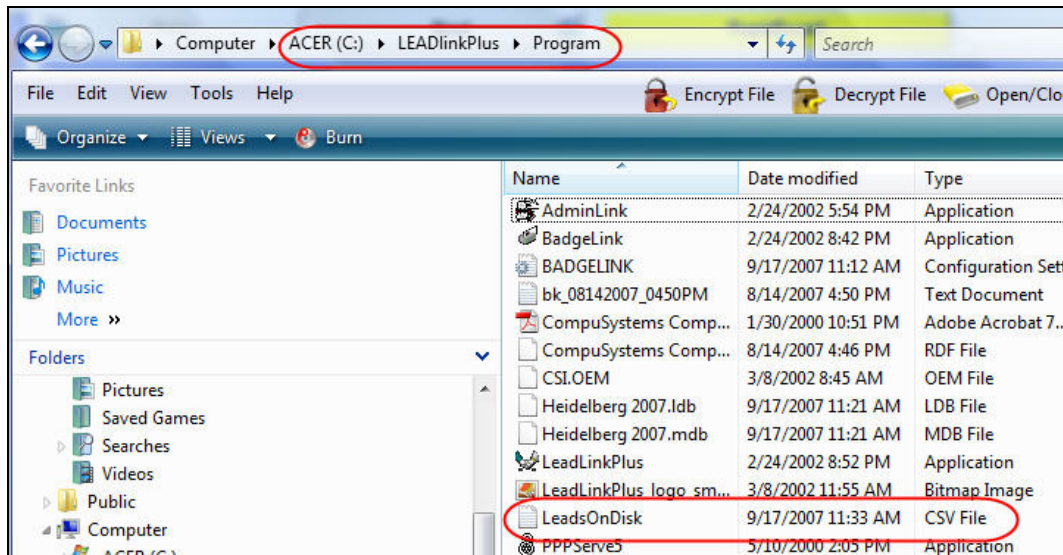
Date Created
08/14/2007 04:51:04 PM
08/14/2007 04:53:38 PM
08/14/2007 04:54:57 PM

5. You'll get a confirmation message; click on **[OK]**.

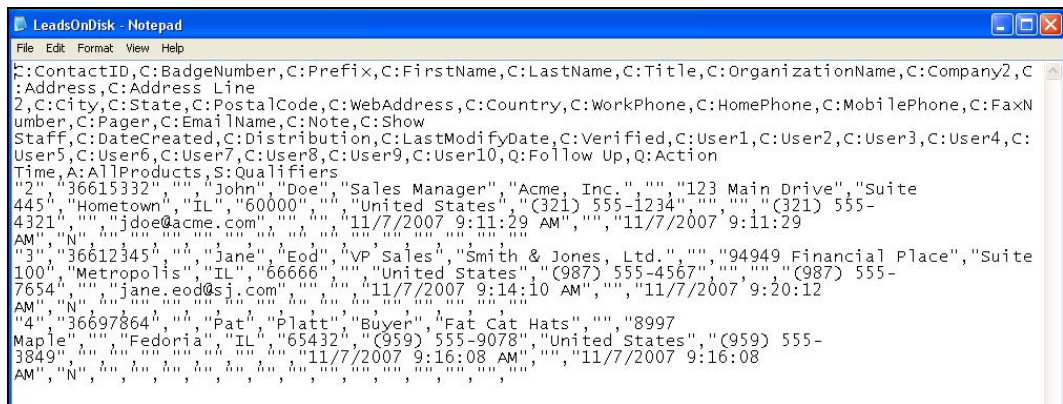


## LEADLink Plus! User Guide

6. In Windows Explorer, navigate to the directory mentioned in step 3 above.



7. The original .csv file, as seen in a text editor, is shown below:



The same file, imported in to MS Excel, looks like this:

	A	B	C	D	E	F	G
1	C:\ContactID	C:\BadgeNumber	C:\Prefix	C:\FirstName	C:\LastName	C:\Title	C:\OrganizationNa
2	2	36615332		John	Doe	Sales Manager	Acme, Inc.
3	3	36612345		Jane	Eod	VP Sales	Smith & Jones, L
4	4	36697864		Pat	Platt	Buyer	Fat Cat Hats

8. Exit from the *LEADLink Plus!* application and save your Excel spreadsheet.

You've successfully captured, qualified, and exported your leads.

## Appendix

### *Pre-Show Checklist*

Take a few moments to complete the checklist below. So doing will help ensure you get the most from your CompuLEAD Desktop Pro device and *LEADLink Plus!* software.

- I understand that if I am unable to successfully complete every item on this checklist, that CompuLEAD Desktop Pro might not function properly.
- I understand that CompuLEAD Desktop Pro requires a computer.
- I understand that a computer is not included with my CompuLEAD Desktop Pro order, and that I have to bring a laptop computer to the show.
- My computer has a CD-ROM drive.
- My computer is running Microsoft Windows 2000, XP or Vista **32-bit version only** (*not compatible with Vista 64-bit version*).
- My computer has a Pentium II processor (or faster processor).
- My computer has an SGVA monitor with a resolution of 800 x 600 dpi or better.
- My laptop computer has at least 256 MB RAM.
- I have successfully installed *LEADLink Plus!* lead management software (included) *on the computer that I'll be using at the show.*
- I have successfully installed the CompuLEAD II driver (found on the CD-ROM) *on the computer that I'll be using at the show.*
- My computer has at least one open USB port.

If you have any questions or issues with the items in this checklist, please contact technical support at: **708.786.5565 – option 3.**

## Determining Your Operating System

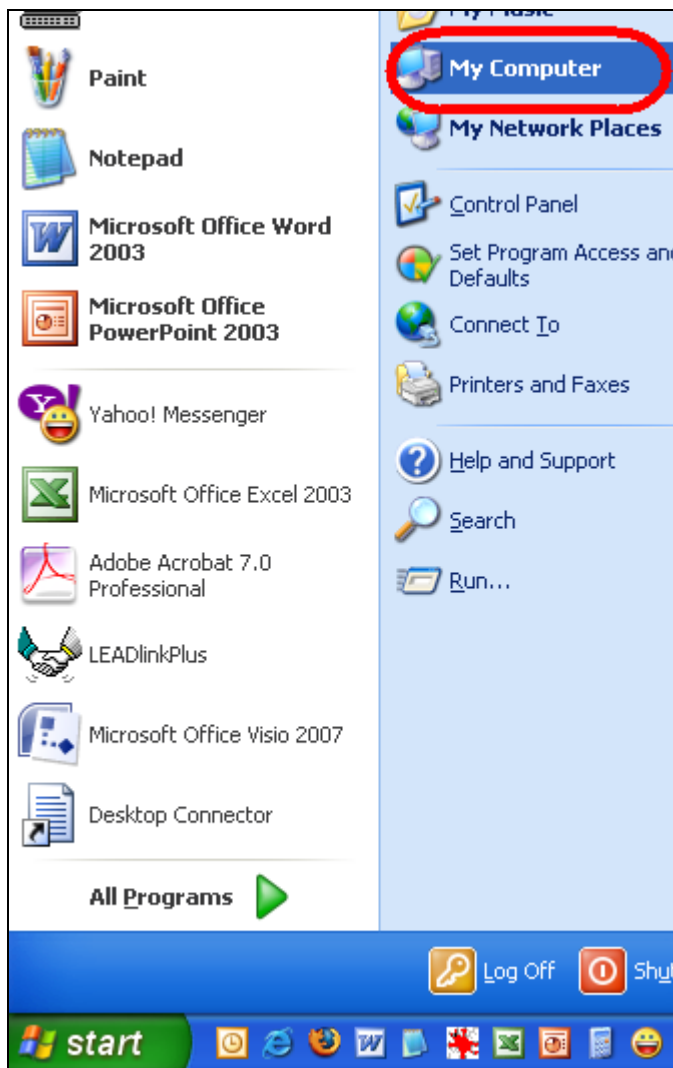
If you don't know your operating system, follow this simple procedure to find out.

### Procedure:

1. Click on the **[Start]** button.

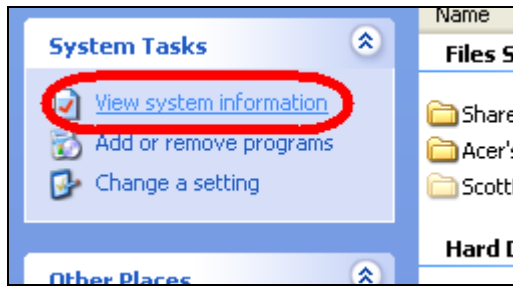


2. From the list that appears, click on **[My Computer]**.



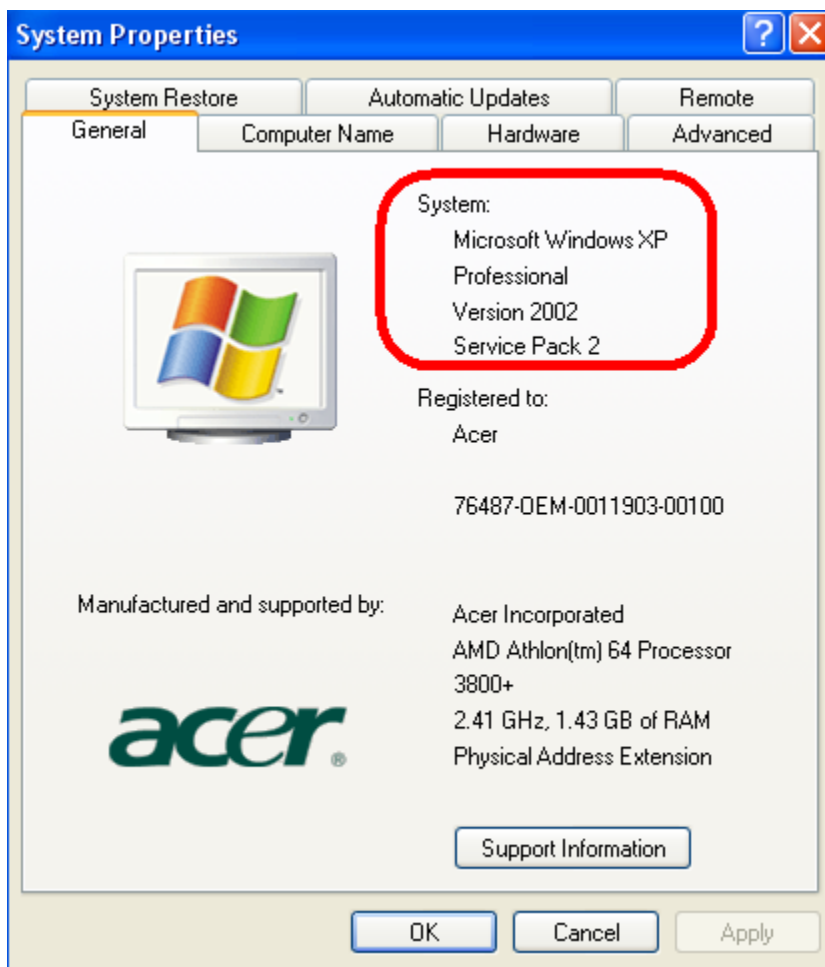
The My Computer screen appears.

3. Click on the **View system information** link.



The System Properties window appears.

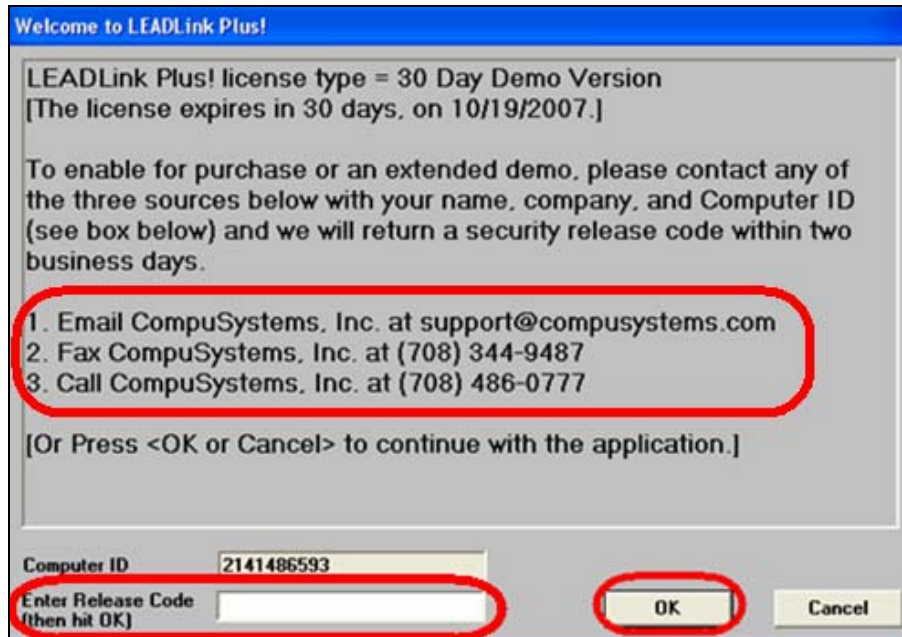
4. Look under the System heading for your operating system data.



This is your version of windows (in the example above, Windows XP Professional).

## Release Code

When you first started *LEADLink Plus!* during the set-up procedures, you saw the following screen and were told to click on **[OK]**.

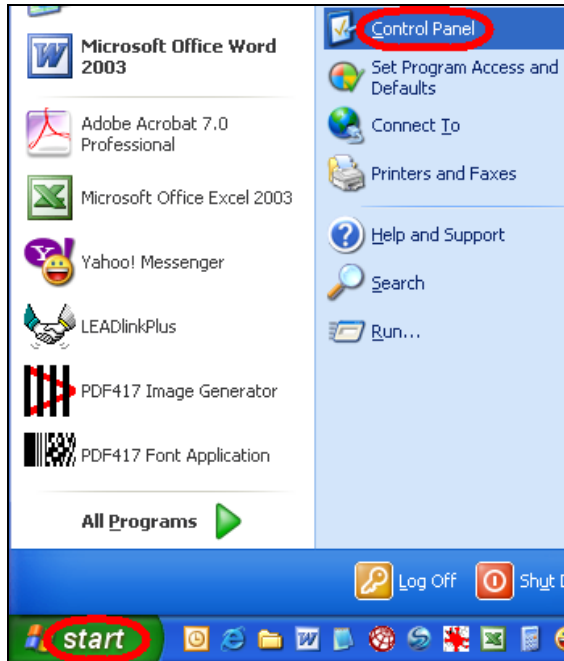


If, however, you've loaded this software for a previous show, you'll need to supply a **release code**. Follow the instructions provided on the screen to obtain a release code.

## Changing Your Port Setting (Advanced)

### Procedure:

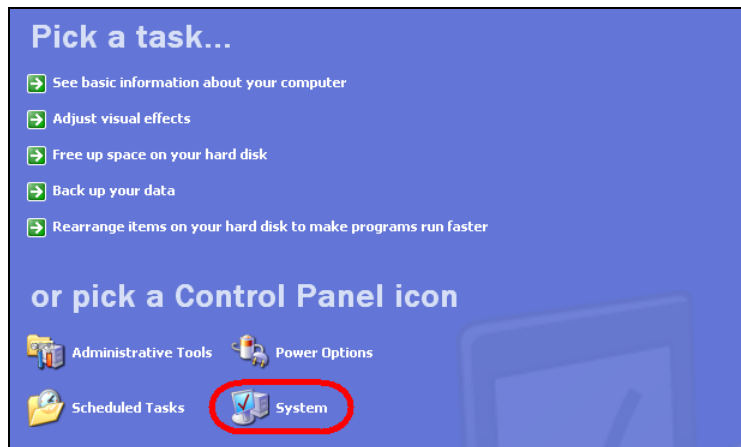
1. Click on **[Start]**, then click on **[Control Panel]**.



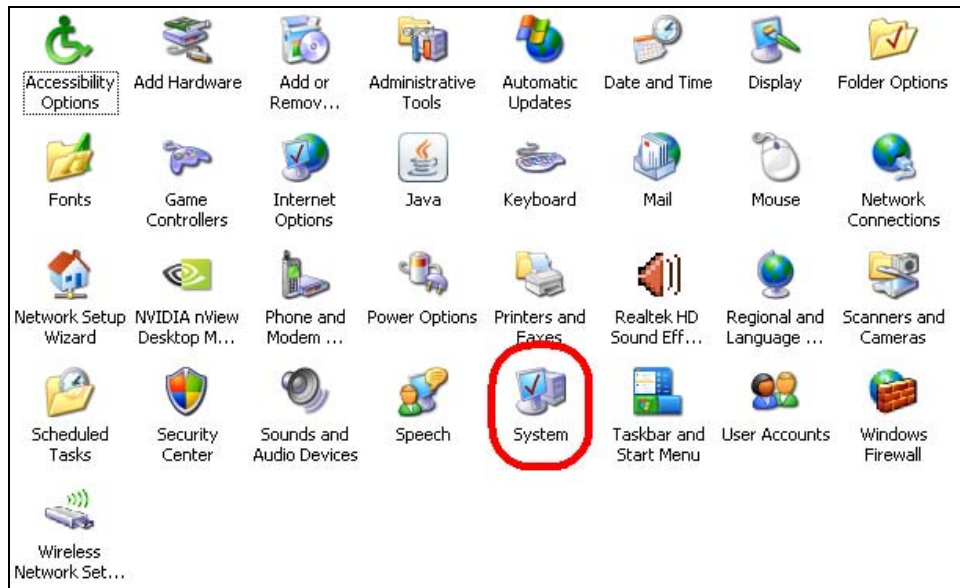
2. You have different options depending on whether your Control Panel is set to "Category" view or "Classic" view.
  - a. *For "Category" view...* Click on **[Performance and Maintenance]**.



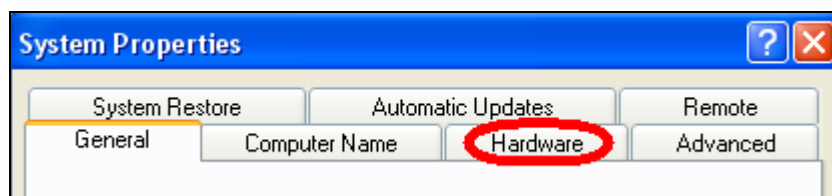
- b. Next, click on **[System]**.



- c. For "Classic" view... From the Control Panel options, double-click on **[System]**.



3. In the System Properties window, click on the **[Hardware]** tab.

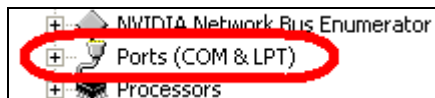




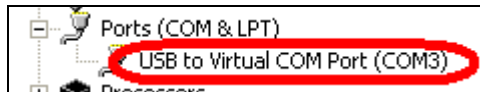
4. In the Hardware tab, click on **[Device Manager]**.



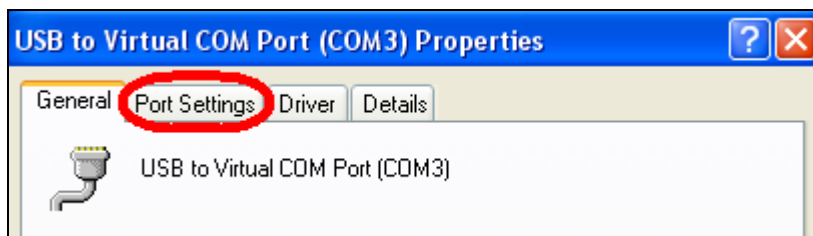
5. In the Device Manager window, double-click on **[Ports (COM & LPT)]** to show the ports available on your PC.



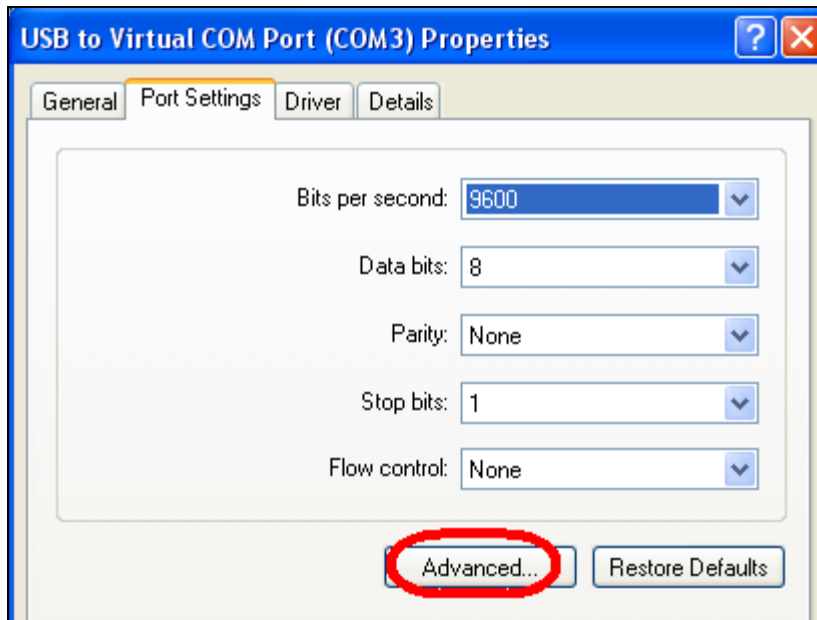
6. The PC in this example shows a USB to Virtual Com Port at COM 3. Double-click on this port name to see its properties.



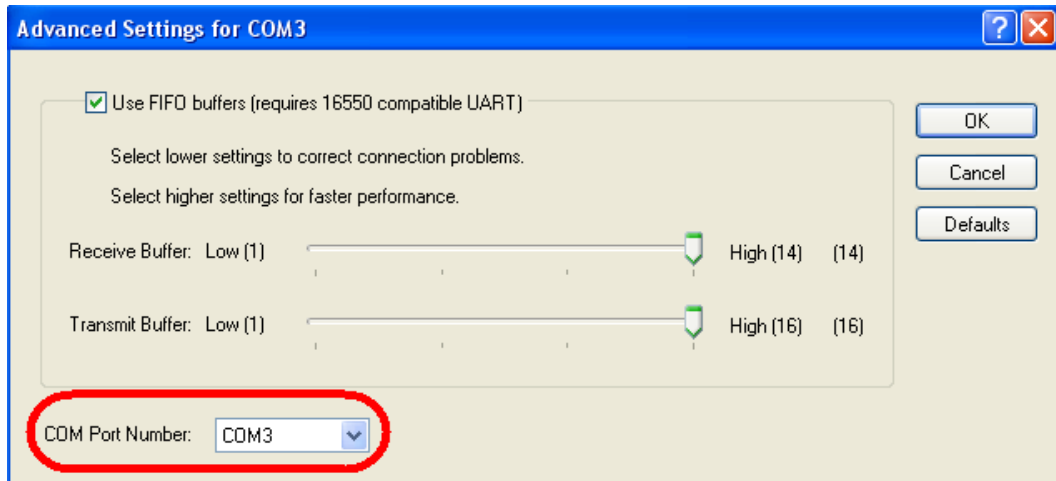
7. In the Properties window, click on the **[Port Settings]** tab.



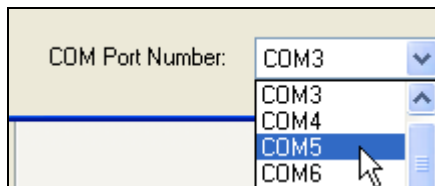
- Click on **[Advanced]** to see the port's advanced settings.



- In the Advanced Settings window, notice that the port defaults to the port shown on the Device Manager window. (In this example, this is COM 3.)



- In the drop-down box, select an open port then click on **[OK]**.



11. Close all open windows.
12. Configure *LEADLink Plus!* to use the new COM port you selected. (Click [here](#) to review the procedure; be sure to select your new COM port number from the Com Port drop-down list.)

## Document Information

**Author:** Scott Buckley  
**SME(s):** Linda Hyerdall, Mel McGuiggan, Alyssa Darrol  
**Sign-off:** Linda Hyerdall

Date	Version	Description
19 Sep 2007	0.1	First draft. Incorporated "Export Leads" procedure into this guide.
25 Sep 2007	0.2	Added RapidScan material; first set of comments from Manju.
07 Nov 2007	0.3	Changed "live" data to fictitious data.
06 Dec 2007	0.4	Incorporated Ernie's and Mel's comments.
12 Dec 2007	1.0	Final updates and sign-off.
11 Jan 2008	1.1	Added "password" call-out
19 Aug 2009	1.2	Added Vista 64-bit updates.

*Versions beginning in 0 indicate a draft status; versions beginning in 1 or later indicate published versions.*