

LEADLink Plus!

Installation Instructions



LEADLink Plus! Installation Instructions

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Compatibility Checklist

Thank you for choosing **CompuLEAD Desktop Pro**, the leading computer-based lead management solution for exhibitors. This is a checklist that contains all the necessary information that you will need to set up the computer that you will be using at the show to work with CompuLEAD Desktop Pro.

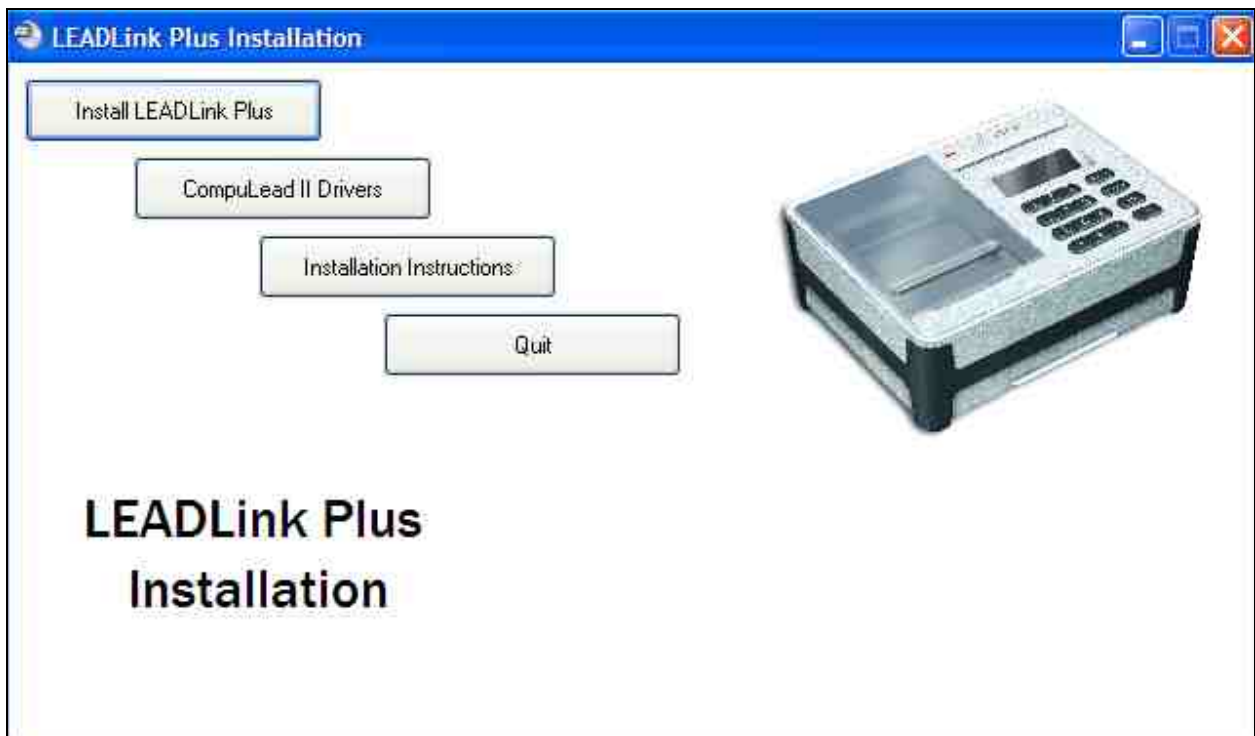
Please make sure you are able to successfully complete every item on the checklist BEFORE you get to the show. If you are not able to do so, please contact an Exhibitor Service Representative immediately at 708.786.5565 – option 3.

- I understand that if I am unable to successfully complete every item on this checklist that CompuLEAD Desktop Pro may 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 purchase, and that I have to bring a computer to the show.
- My computer has a CD-ROM drive.
- My computer is running 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.
- My computer has a SVGA monitor with a 800 x 600 resolution.
- My computer has at least 256 MB RAM.
- I successfully installed the *LEADLink Plus!* lead management software (included) on the computer that I will be using at the show.
- I successfully installed the CompuLEAD II Driver (located on CD-ROM) on the computer that I will be using at the show.
- My computer has an open USB port.

If you have questions about any of the items on this checklist, you can contact our technical support line at **708.786.5565 – option 3**.

Installation

The *LEADLink Plus!* installation will automatically run when you place the CD-ROM in the drive. If not, using the Start Button, select Run and browse to your CD-ROM drive. Select "Double Click Here to Launch" and click open. Now click the OK button. The installation menu will start and you will see four options.



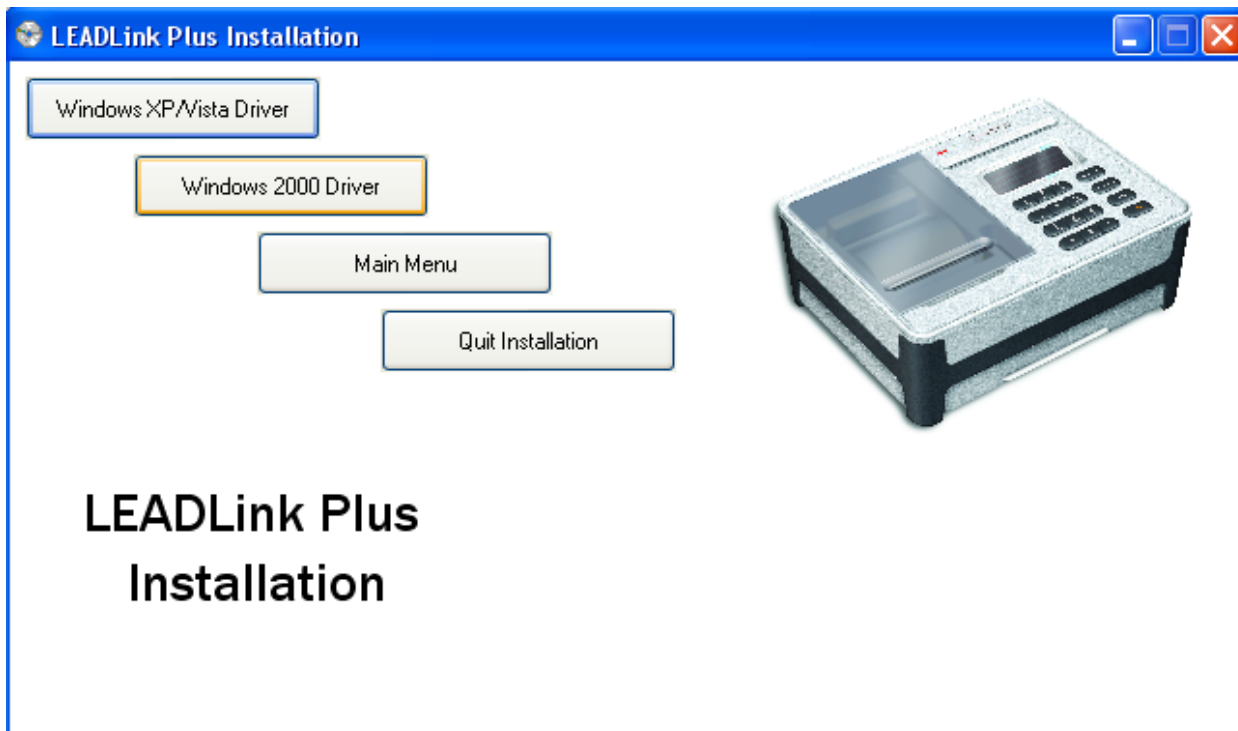
Choose "Install LEADLink Plus" first.

The installation program will ask you to be sure that all other programs are shut down. Once complete, click the Next button. Next it will ask you to select the Destination Folder, unless you have another program with the same name and in the same folder, use the default destination and click the Next button. The last screen will let you know that the installation process is complete, click the Finish button. There will now be an icon for *LEADLink Plus!* On your Desktop. To start the application, double click the icon.

- **NOTE!!** The first time you start the application, a Welcome screen will pop up and ask for a Release code. If this is the first time you have loaded this application onto this PC, just click OK. If you have loaded this software on this PC at a prior show, you will need the release code to use this application. Use the instructions on the Welcome screen to receive your Release code.
- **NOTE!!** The user license is for 30 days after you install the application. Be sure to Export your leads before the end of the 30 day period.

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Once installation of *LEADLink Plus!* has completed, choose "CompuLEAD II Drivers".



If your computer runs on Windows XP or Vista **32-bit version only** (*not compatible with Vista 64-bit version*), choose "Windows XP Drivers". If your computer runs on Windows 2000, choose "Windows 2000 Drivers". The drivers are necessary for the CompuLEAD II to interface with the *LEADLink Plus!* software.

NOTE: If you do not have administrator rights to your computer, you will need to seek your system administrator before installing these drivers.

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Upon choosing an installation, XP, Vista or 2000, a warning box will appear:



Choose "Continue Anyway". A second similar box will be presented, choose "Continue Anyway" again. This will happen two additional times. Choose "Continue Anyway" each time. When finished you will see the following:



Click "OK".

You may then "Quit Installation" or return to the main menu for other options.

Note: After installation, the CompuLEAD II may not be recognized. Therefore, it is recommended that you restart your PC before scanning any badges.

Setup Your LEADLink Plus! System

The setup should be done **before** the Event and should have just one person designated as the "Administrator". The Administrator will have the password for setting up the application and for making changes to the standard Qualifiers and Survey Questions, as well as entering Products if desired. To prevent unauthorized changes to the settings, the Administrator should control access to the password.

To Start the *LEADLink Plus!*, double click the *LEADLink Plus!* Icon on your desktop. You will see a warning box appear on the screen. Please click "OK", it will happen 4 times. This error occurs because you do not have a CompuLEAD II connected to your computer or the correct COM port was not chosen.

- 1) To setup the database for the show, the Administrator should go to the Menu Bar and select Setup. Then select Administrator Mode and enter the password **csi**. The Menu Bar will now show additional choices.



Password

a) Name your Show's database:

- i) In the File Menu, click "Save As" and Type in a name that will identify the Event you are using *LEADLink Plus!*
- ii) Then in the File Menu, click "Open" and select the database name you just entered. This will now become the default database every time you start the application.

b) Customize the Show Information Page:

- i) In the Setup Menu, click the "Show" button and then the "Show" tab and enter the information for your Event.
- ii) When you are finished, click the "Save" button.

c) Customize the Qualifiers:

- i) In the Setup Menu, click "Show" and then the "Qualifiers" tab. Review the Standard Qualifiers to see if they meet your needs.
- ii) To edit the current Qualifiers, click on the text of the Qualifier you want to change and type in the new text. Continue until finished, click the "Save" button.
- iii) To Add new Qualifiers, click the Add button.
 - (1) As before, click on the text of the new qualifier and type in the new text.
 - (2) Now click on the corresponding code and enter the next sequential number (i.e. 11,12...). Continue until complete, then click the "Save" button.
- iv) To delete Qualifiers, highlight the Qualifier and click the "Delete" button.
 - (1) Note: Do not delete Qualifiers once you start using *LEADlink Plus!*. Deleting will remove that Qualifier from all records.

d) Customize the Products:

- i) In the Setup Menu, click "Show" and then the "Products" tab.

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- ii) To edit the current Products, click on the text of the Product you want to change and type in the new text. Continue until finished, click the "Save" button.
 - iii) To add a new Product, click the "Add" button.
 - (1) As before, click on the text of the new Product and type in the new text.
 - (2) Now click on the corresponding code and enter the next sequential number (i.e. 11,12...). Continue until complete, then click the "Save" button.
 - iv) To delete Products, highlight the Product and click the "Delete" button.
 - (1) Note: Do Not delete Products once you start using *LEADLink Plus!* Deleting will remove that Product from all records.
- e) Customize the Survey Questions:**
- i) In the Setup Menu, click "Show" and then the "Survey Questions" tab.
 - ii) To add a new Question, Click the "Add" button on the top windowpane.
 - (1) Click on the Name of the question and give it a short but useful name (i.e. Purchase Authority, Number of Emps).
 - (2) Click on the text of the Question and type in the question as you want it to appear on the screen (i.e. What is your Purchase Authority, What is the Number of Employees at your Company).
 - (3) Click on the Selection type and choose between a Multi Answer or Single Answer Question.
 - (a) A Multi answer question allows you to select as many answers as you like.
 - (b) A Single answer question allows you to select only one answer for the question.
 - iii) To add the Answers to the Question you just entered, click the "Add" button in the Choices windowpane.
 - (1) Click on the text for the choice and enter in the text for the Answer. Keep the answer as short as possible, as this is the data stored (i.e. Recommends, Final Approval, 1-100, Over 100%...).

Re-Use Your Custom Settings:

If you have purchased *LEADLink Plus!* at a previous Show and you have purchased the service at your current Event, you can re-use all of the custom information. The designated "Administrator" can use the password to enter the Administrator mode. After you have saved the database under the new name and have made it the default database, you can clear out all of the previous Show's contact information to start out fresh. In the Edit menu, click "Purge All Contacts".

CompuLEAD II COM Port

This step can not be accomplished until you receive your CompuLEAD II rental at the show.

I. CompuLEAD II Installation

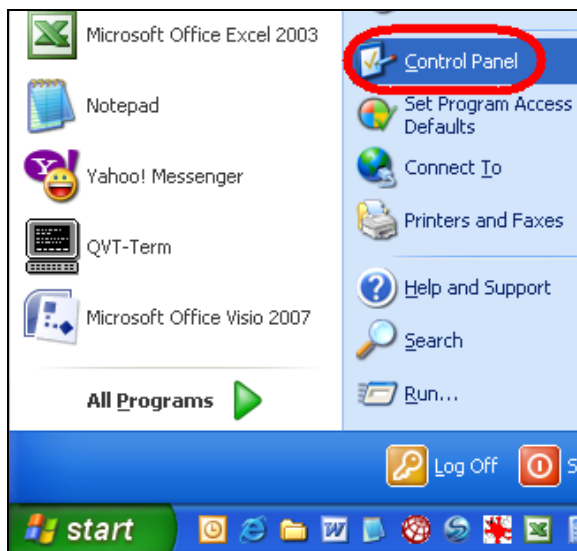
1. Turn on CompuLEAD II
2. Connect USB cable to the USB port on the back of the CompuLEAD II
3. Connect the other end of the USB cable to the USB port of your PC
4. Read a badge to open the Virtual Serial Port on the CompuLEAD II
5. Select "No, not this time" and then click "Next"
6. Select "Install from a list or specific location" and click "Next"
7. Select "Include this location in the search" and then click "Browse"
8. Browse and select the directory where the drivers are located and then click "OK"
9. Click "Continue anyway"
10. Click "Finish"

II. Determining and Setting the COM Port

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

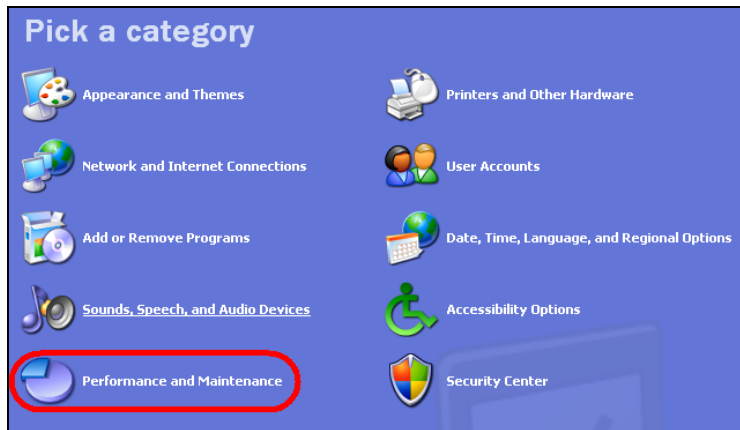


2. From the items that appear, click on **[Control Panel]**.

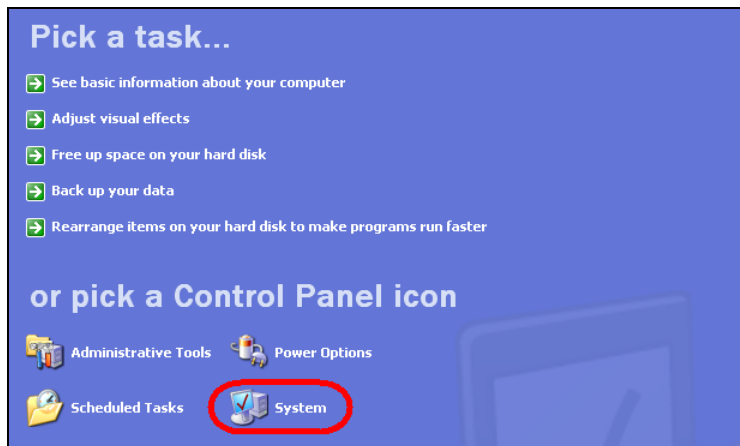


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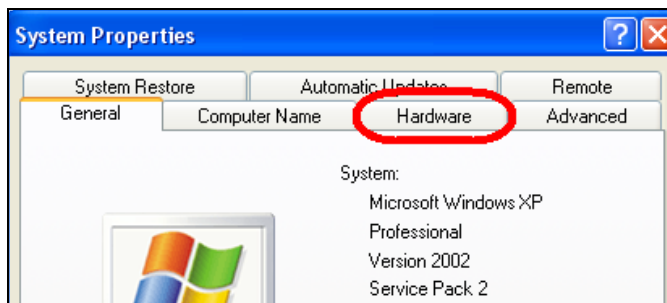
3. Click on **[Performance and Maintenance]**.



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



5. 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.)*



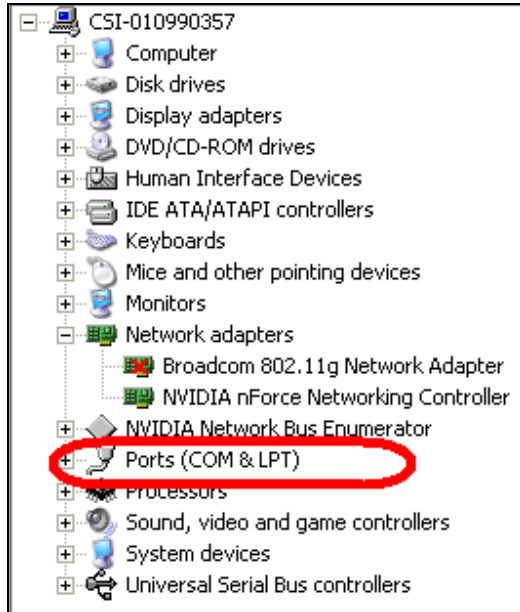
6. In the Hardware tab, click on the **[Device Manager]** button.

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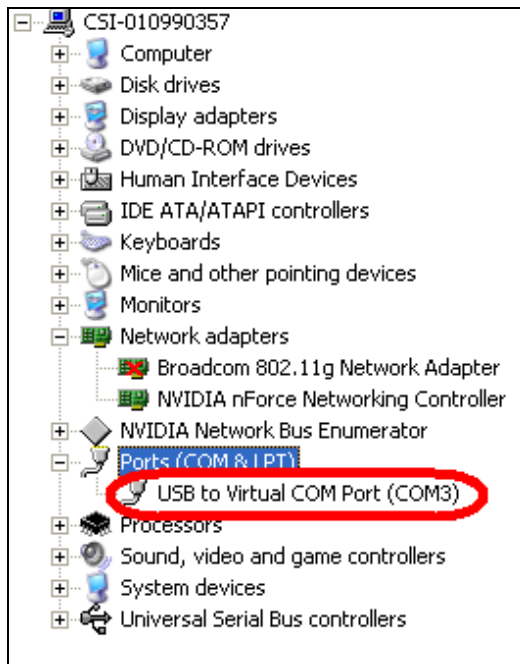


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7. From the Device Manager list, double-click on **[Ports (COM & LPT)]** to see its sub-values.



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**).



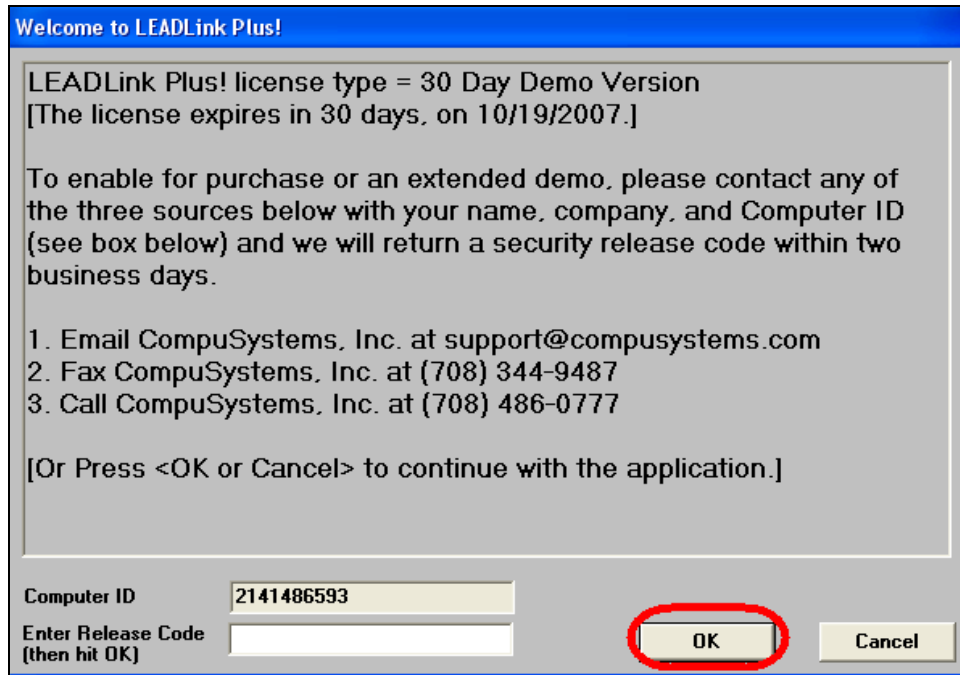
In this example, the PC has defaulted to **COM3**. You'll want to remember this for later. Close the Device Manager and Control Panel.

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



9. 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.



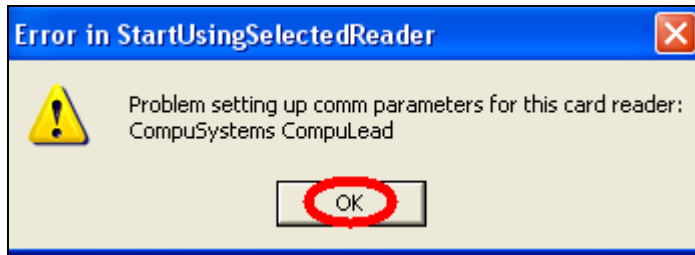
Once you receive the Release Code, enter it in the Enter Release Code field then click on **[OK]**. (If you've never installed *LEADLink Plus!* on this PC, you won't see this screen.)

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

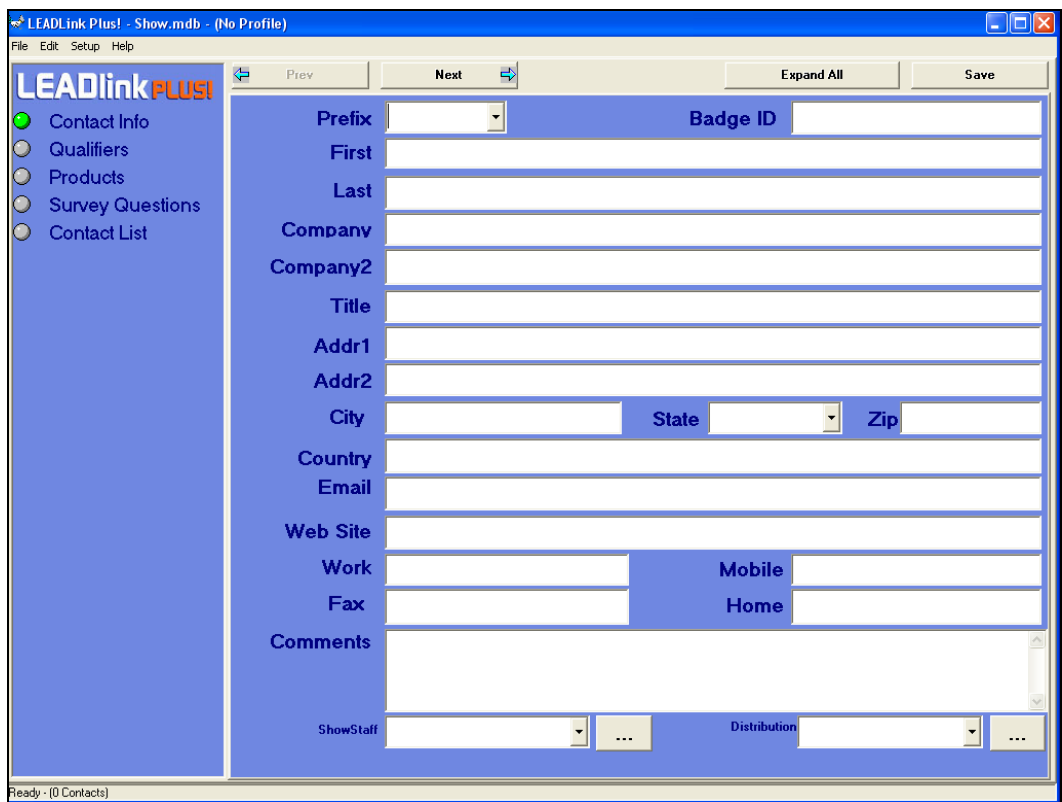


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11. You'll get another error message. Click on **[OK]**. These two error messages may continue several more times; click on **[OK]** each time until the error messages stop.

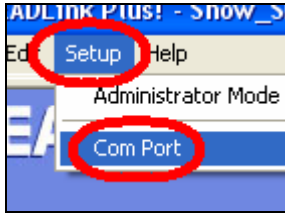


12. The main *LEADLink Plus!* screen appears.

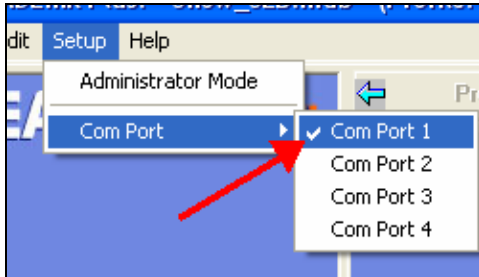


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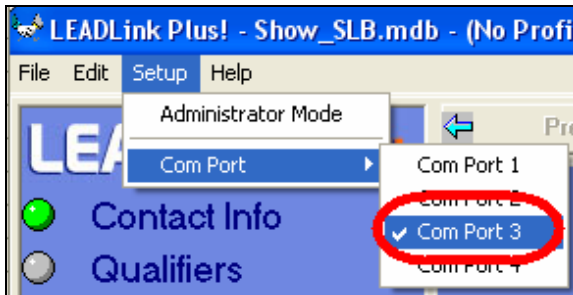
13. From the top menu bar, click on **[Setup]** then on **[Com Port]**.



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



15. 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.

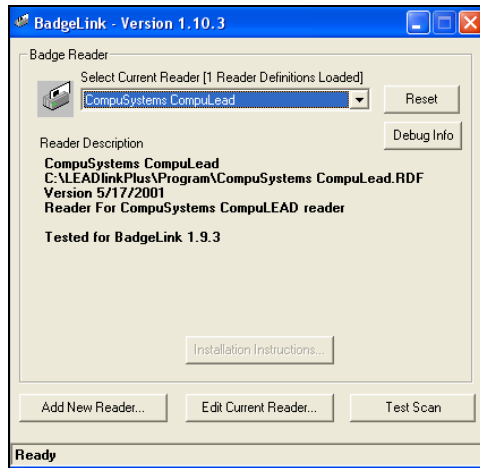


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16. A new icon appears at the bottom of your display. Click on it.



This shows your BadgeLink application is set to read a CompuSystems CompuLEAD device.



Your COM port set-up is complete. Please reboot your PC to before scanning any badges.

Use of LEADlink Plus! at the show

- 1) To Start the application, double click the *LEADlink Plus!* Icon on your desktop. With the CompuLEAD unit attached and turned on, insert the badge (with the code facing you). The CompuLEAD unit will beep after a good scan and the data will then populate the fields on the screen. You can then Qualifier your lead, Scan another badge, or click Save.
- 2) To Qualifier your leads, select any of the choices from the navigation window on the left side of the screen (i.e. Qualifiers, Products, Survey Questions). The Qualifiers and Survey Questions are setup with our *LEADlink Plus!* Defaults, but the Products will have to be setup by you if you wish to use them.
- 3) To Select a Qualifier, click on the appropriate Qualifier(s) check box to select or deselect your choices. When you are done, you can navigate to Qualifiers or Surveys, return to the Contact Information, or you can click Save.
- 4) To Enter a Product, click on the appropriate Product(s) check box to select or deselect your choices. When you are done, you can navigate to Products or Surveys, return to the Contact Information, or you can click Save.
- 5) To Answer a Survey Question, click on the appropriate Survey Answer(s) check box to select or deselect your choices. When you are done, you can navigate to Products or Qualifiers, return to the Contact Information, or you can click Save.
- 6) To Export your leads, click on the File menu and select Export Leads on Disk. The select a destination drive and directory, its name, and the date range you want to include in you download. (To download one day's leads, just use the same date for the start and end dates).
- 7) To Exit the application, click on the File menu and select exit. All of your leads are saved as you scan a new badge, move to a different screen, or click save. (Whenever you finish with a lead and you have no one else to scan, click the Save button).

**If you have any technical support questions,
please contact a Representative at
708.786.5565 – option 3**

