



2B-Leads

The Ultimate in Lead Retrieval

2B-Leads is designed for exhibitors who want the flexibility of using a hand-held mobile scanning device to capture and qualify leads during an event.

Customize

- Create sales reps
- Create custom action codes

Capture & Modify

- Scan the barcode to capture attendee contact information
- Verify/add/edit contact information first-hand (phone number, mailing address, email address, phone extension, and more)

Qualify

- Choose purchase time (Pick list: immediately, 30 days, 60 days, 90 days, etc.)
- Assign sales representative (Pick list)
- Rate the lead (Pick list: hot, warm, cold)
- Add notes
- Select follow up action (send email, send literature, send samples, plus 3 customized action codes)



2B Solutions

Microsoft
GOLD CERTIFIED
Partner

Mobility Solutions
ISV/Software Solutions
Microsoft Business Solutions



2B-Leads

Scan

Widget Corp

Quick Fill: :

Date: 8/17/2004

Time: 2:00 AM

Title: Director of Purchasing

First: Robert

Last: Dawkins

Sales Rep: Amelia Crosswhite

Rating: Hot

Purchase: 30 days

Action: Send E-mail
 Send Literature
 Send Samples

Scan Notes Detail Survey Data

- Verify, add, and/or edit contact information
- Assign sales rep
- Rate the lead
- Select follow-up action

Detail

Widget Corp

ID: 3034

Prefix:

First: Robert

Middle:

Last: Dawkins

Suffix:

Title: Director of Purchasing

Company1: Widget Corp

Company2:

Addr1: 128 Widget Drive

Addr2: Suite 105

Addr3:

Scan Notes Detail Survey Data

Notes

Notes:

Looking to upgrade to v.5 and wants references

Scan Notes Detail Survey Data

- Add additional notes about the contact or opportunity
- Answer survey questions to further qualify

Survey

Are you in charge of purchasing?

Where do you normally purchase?

What is your budget?

Scan Notes Detail Survey Data

List View

List		
UAB	CLAY	BOYCE
BIRMINGHAM	AL	35294
2059342825		
USA Direct	Jan	Smith
Destarpin Environm	Bill	Destarpin

- At any time, view the list of leads captured by 2B-Leads
- Select and edit or add additional information

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