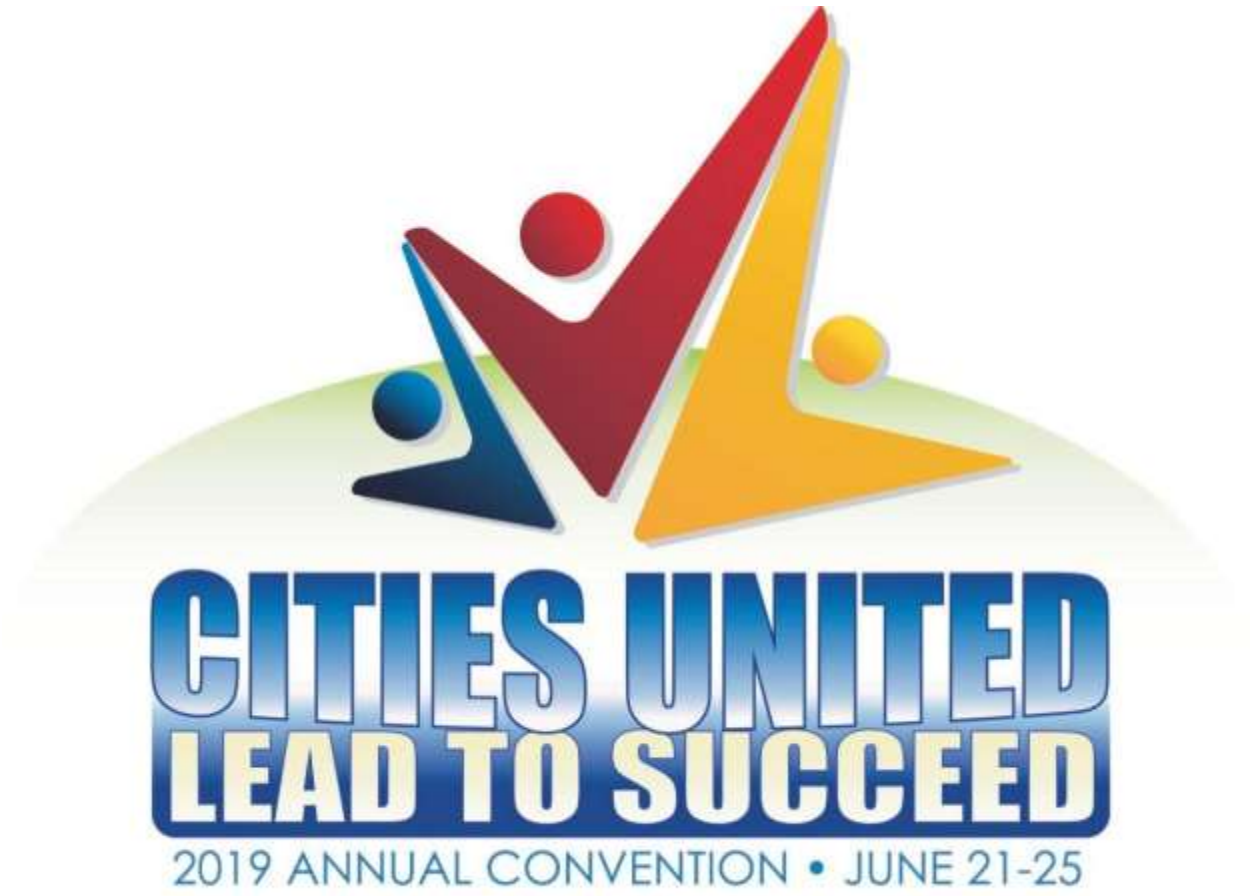


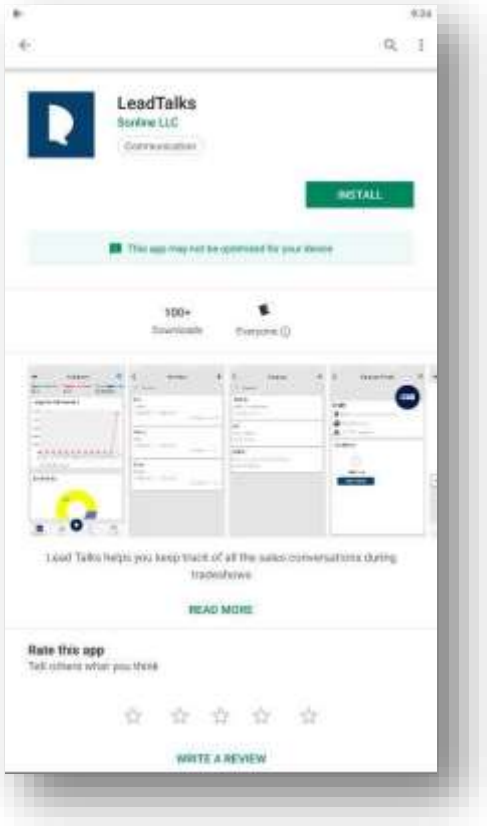
Welcome to the Georgia Municipal Association's 2019 Annual Convention! The event organizers have provided exhibitors with the LeadTalks application to help with lead retrieval and capture takeaway notes. This quick start guide will help you set up your LeadTalks account and get started with gathering leads during the event.

What is Leadtalks?

LEADTALKS

LeadTalks helps you keep track of all the sales conversations during exhibitions, tradeshows, and conventions. Your sales & marketing teams can easily add new leads, capture business cards, and add audio and video within LeadTalks that can be easily accessed from the web portal.

Prospects / Customers can easily leave a detailed voice message on the mobile app that would be assigned to a salesperson, SME or the support team for follow-up action. LeadTalks closes the gap between salespeople and managers as it provides a dependable interface with action items. Managers can easily assign the leads to internal salespeople or external partners for follow-up and closure, ensuring that every lead is acted upon.



LeadTalks provides an easy search of customer leads for a given tradeshow, their contact information or even the details of the conversations in voice or text.

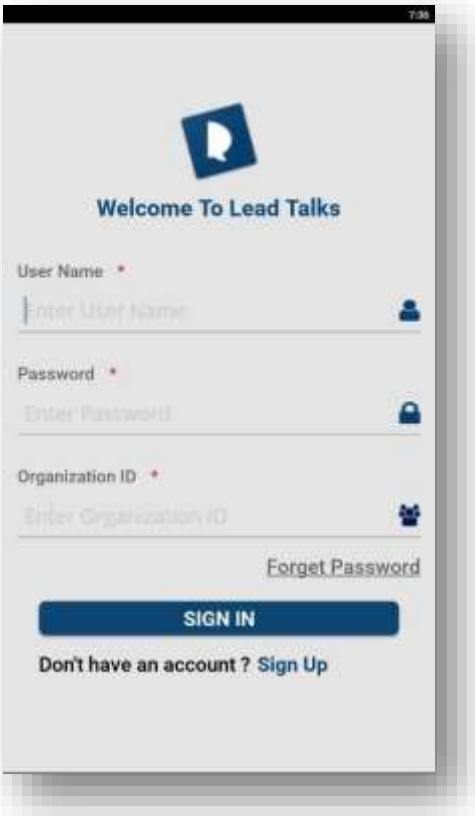
Download the app

Android:

https://play.google.com/store/apps/details?id=com.sonline.leadtalks&hl=en_US

iPhone: https://itunes.apple.com/us/app/leadtalks/id957631585?mt=8

Sign In:



Username: your email address

Password: ***password*** (Contact your administrator if it does not work)

Organization ID: gma

Select Sign-In to access the program.

Dashboard

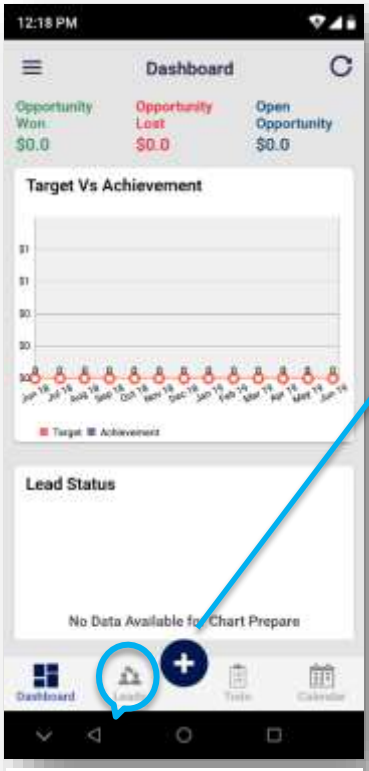
Upon login you will see the Dashboard showing useful metrics for Leads status and Targets set.

Adding Leads and Capturing Information

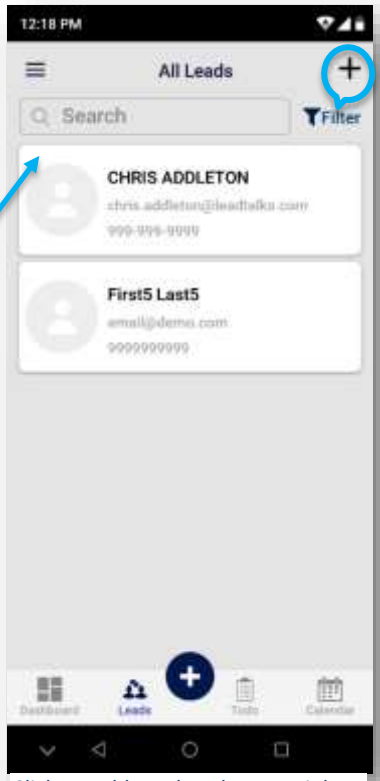
Select Leads from the tray at the bottom of the screen.

Here you will find the list of leads (individuals that you would meet during the conference. Initially it would be an empty list)

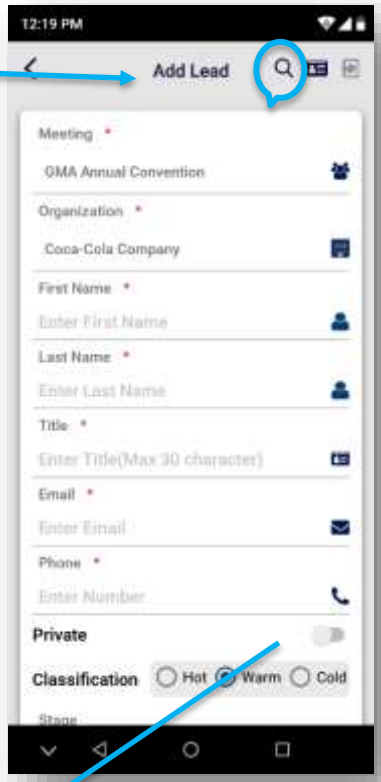
To build the lead list during the conference, click on the + sign (Add Lead). Choose the Search attendee icon. In the Search window, begin typing the name and LeadTalks will filter the contacts / attendees registered for GMA event.



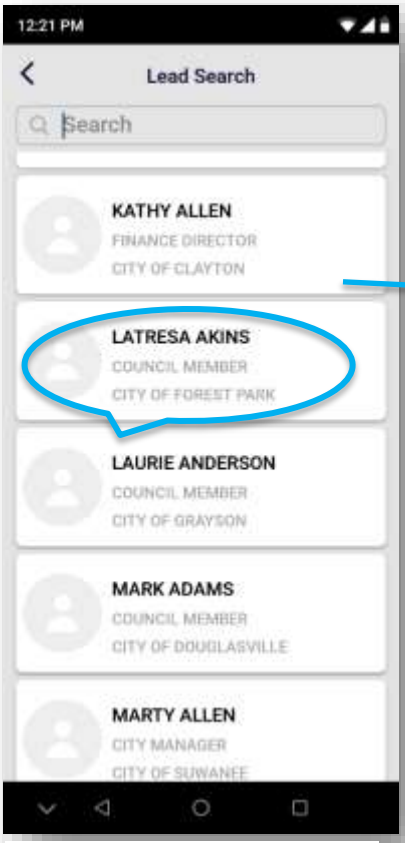
Select Leads



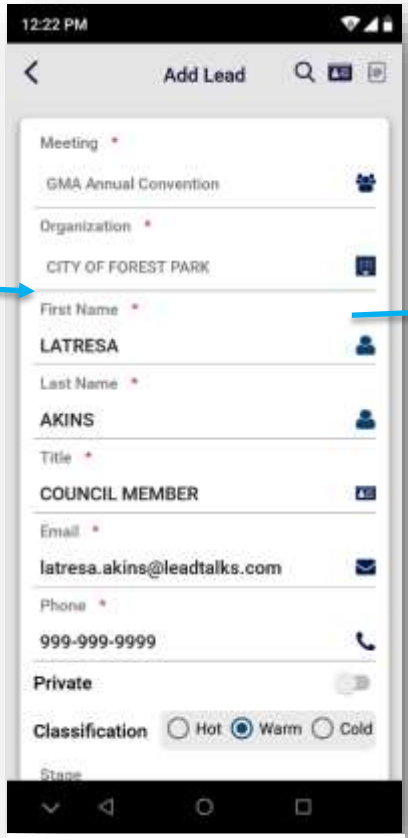
Click on Add Lead at the Top Right



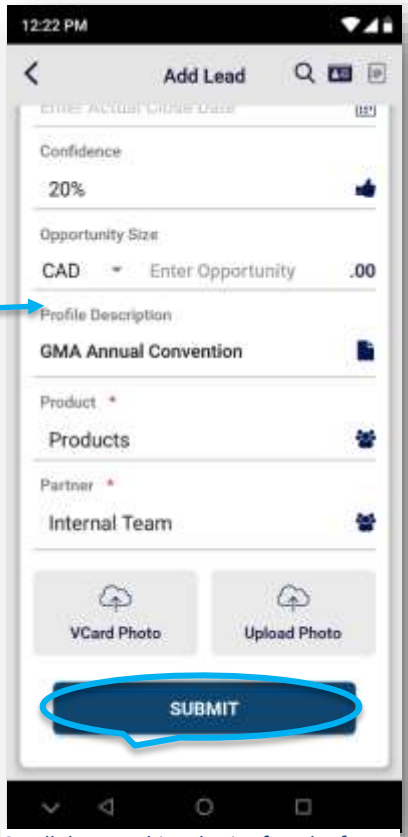
Search for the Attendee by clicking on the Search Tool



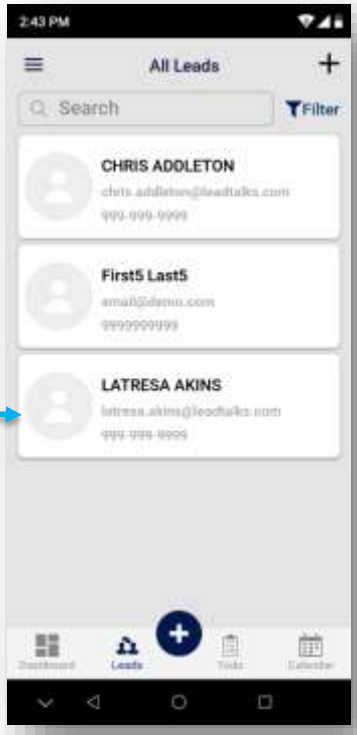
Look for the attendee that you want to add as a lead.

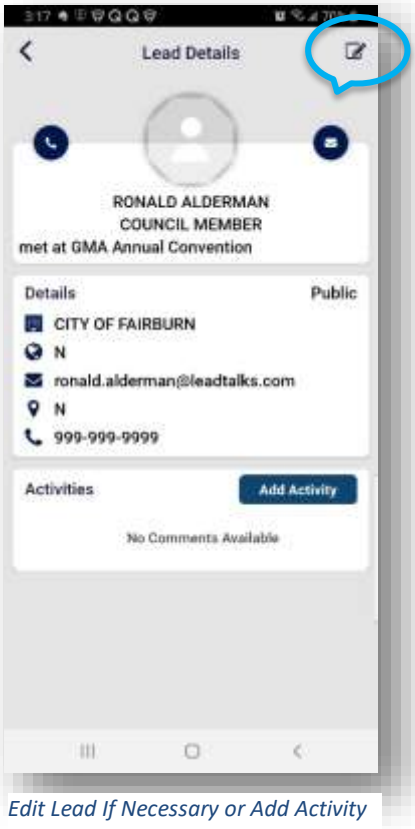


Remember to change the phone number and email address of the lead

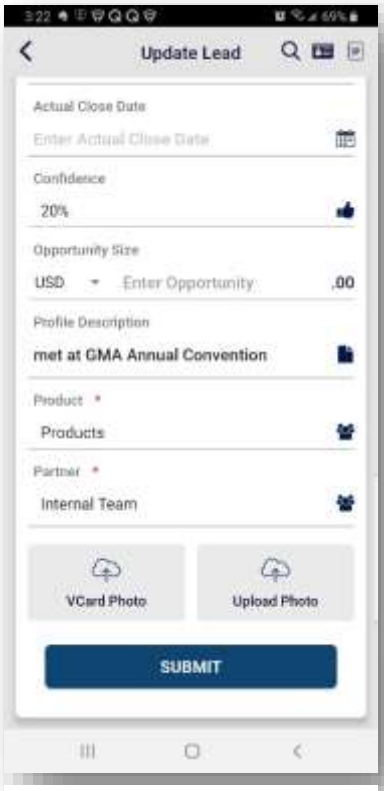


Scroll down to hit submit after the form is filled out. You have added a lead!





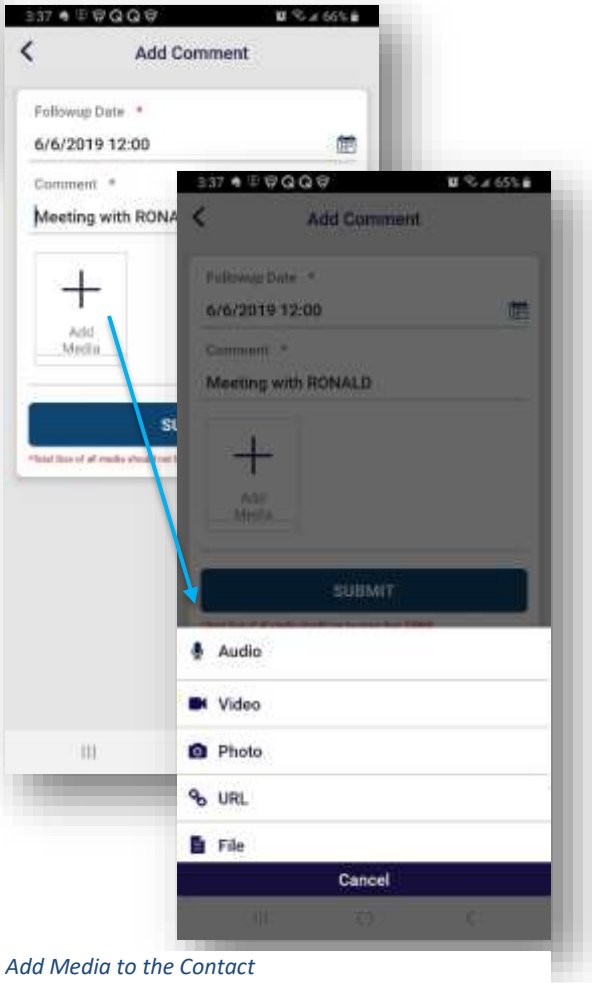
Edit Lead If Necessary or Add Activity



Complete by Selecting Submit

Use the Edit button if the email or phone number need to be modified.

Hit Submit to update the lead.



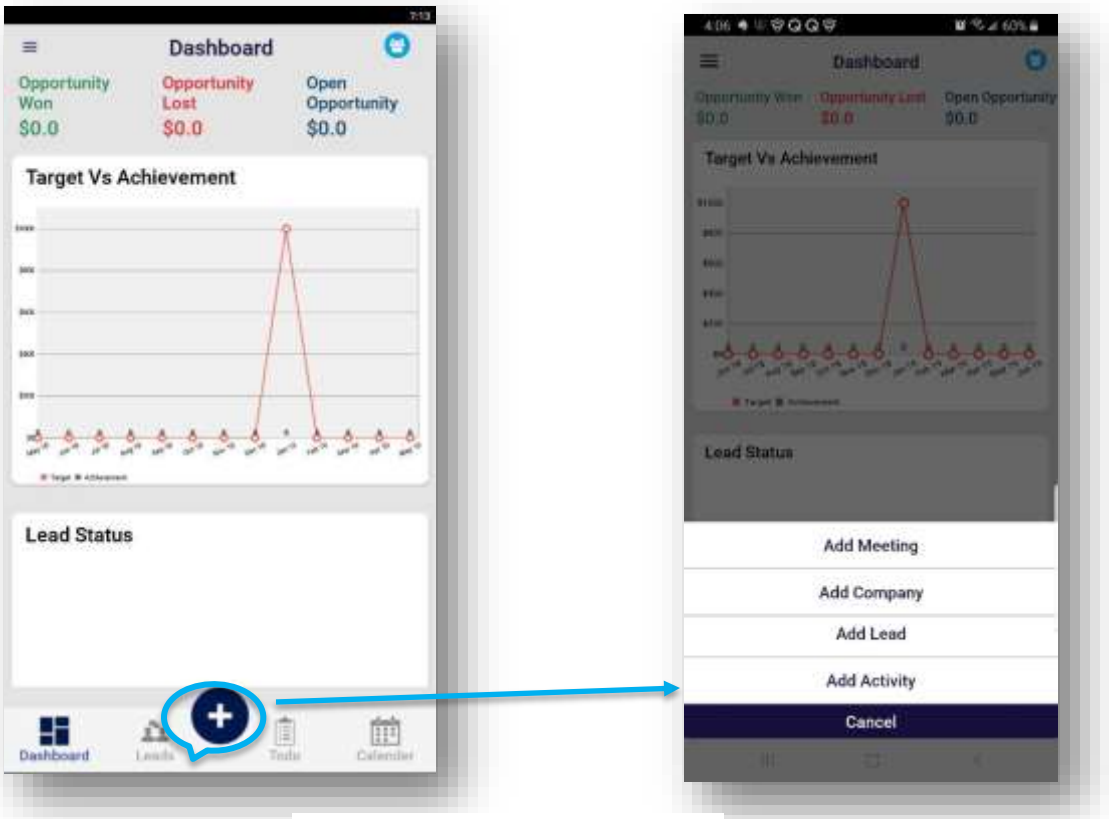
Add Media to the Contact

You can edit the rest of the information later. To add comments and/or media (audio, video or photo information) to the lead, select Add Activity. For voice notes (that will be both recorded and transcribed for you) or other media, select Add Media.

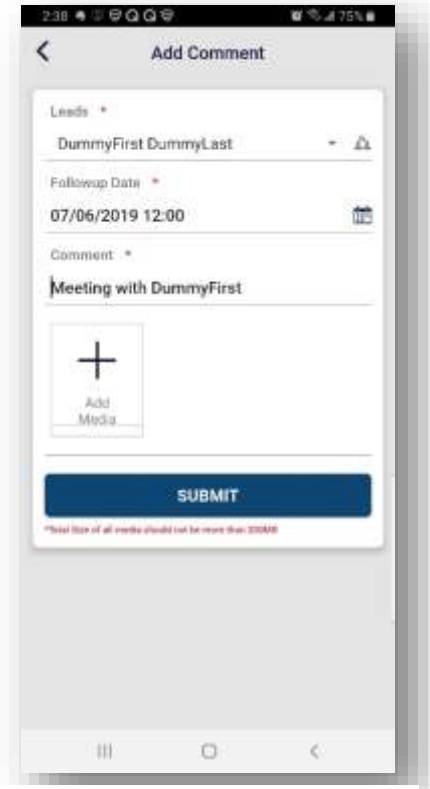
Select Submit to complete the task.

To Add an Activity

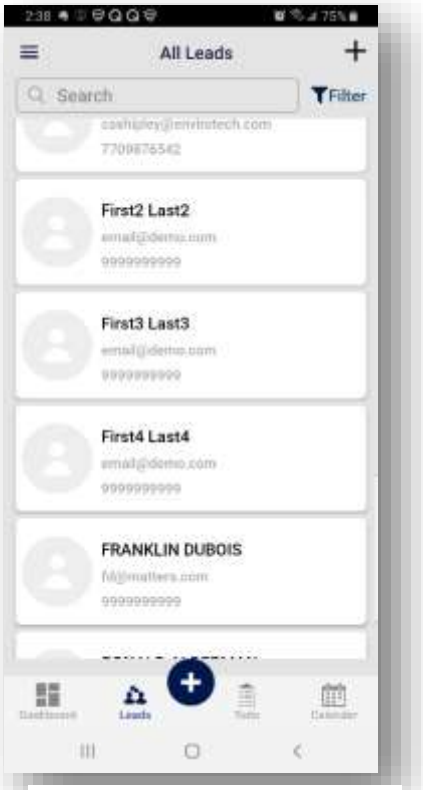
If the lead is not currently in the attendee search and you don't have time to add a new lead with all required information, go directly to Add Activity.



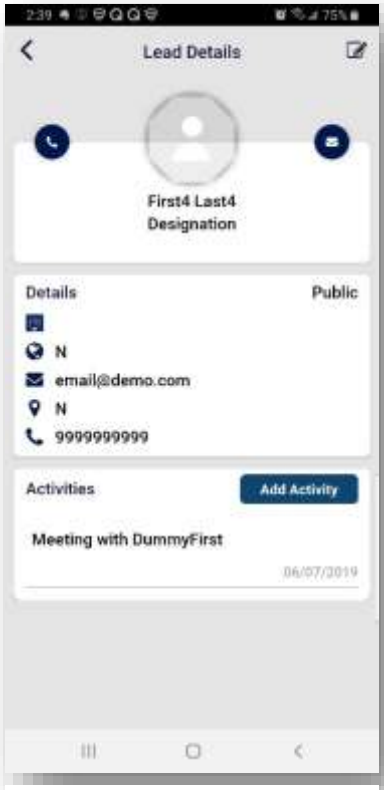
Add Meeting, Company, Lead or Activity



Add Activity Default Name, Followup Date



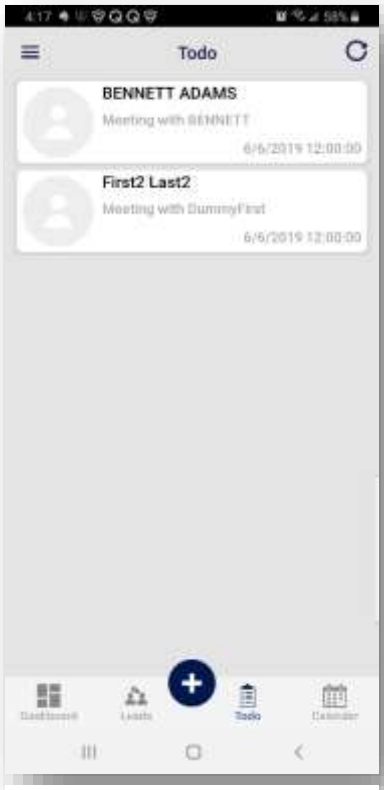
Default Name Change



Edit Name, Email & Phone

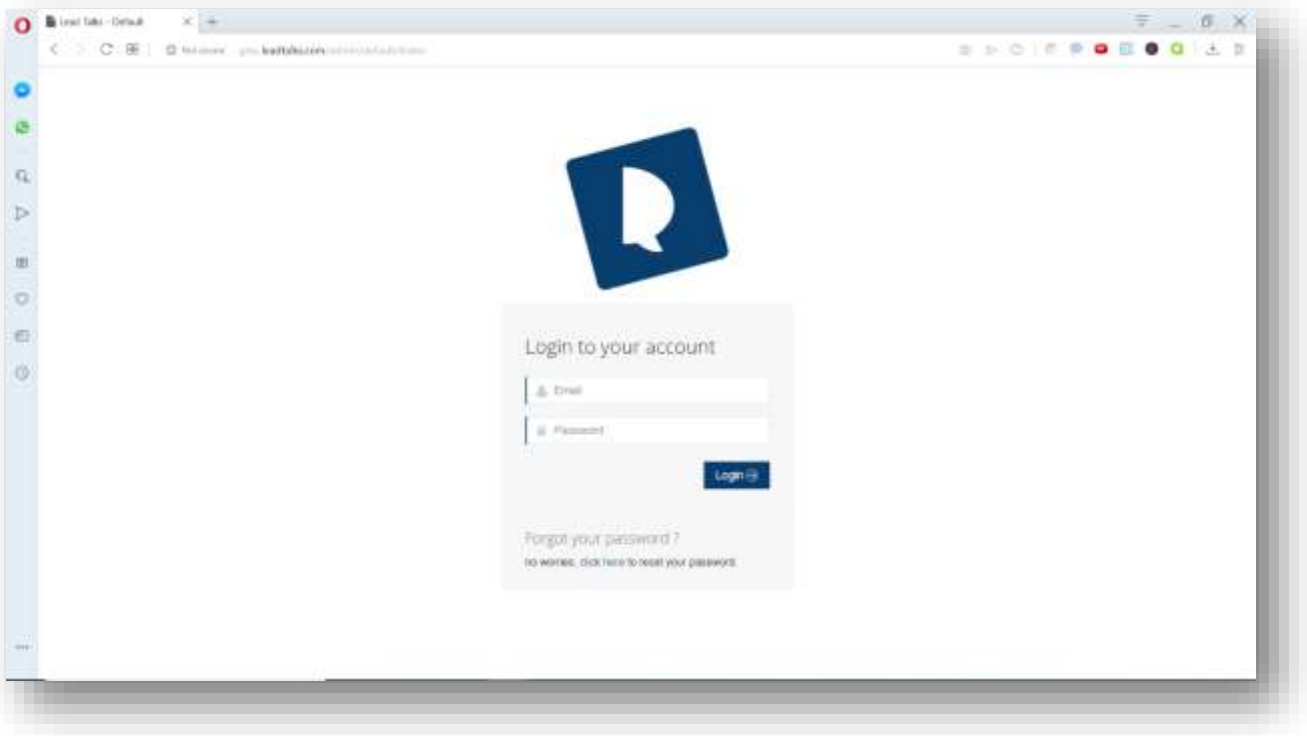
Required fields are pre-filled, allowing quick access to Add Media. Record text notes or video or take a picture of the business card. There will be a default Lead name as indicated in the image. In the Leads list this lead name changes to First# Last# (auto-incrementing to retain unique placeholder). Here you can select the name, use the Edit tool and make changes as necessary. The Follow-up Date option in the Add Activity/Add Comment window adds to the To-Do list.

Note: You can only delete information using the Web Portal on Desktop.



To Do List

Viewing the LeadTalks Instance from the Web Portal

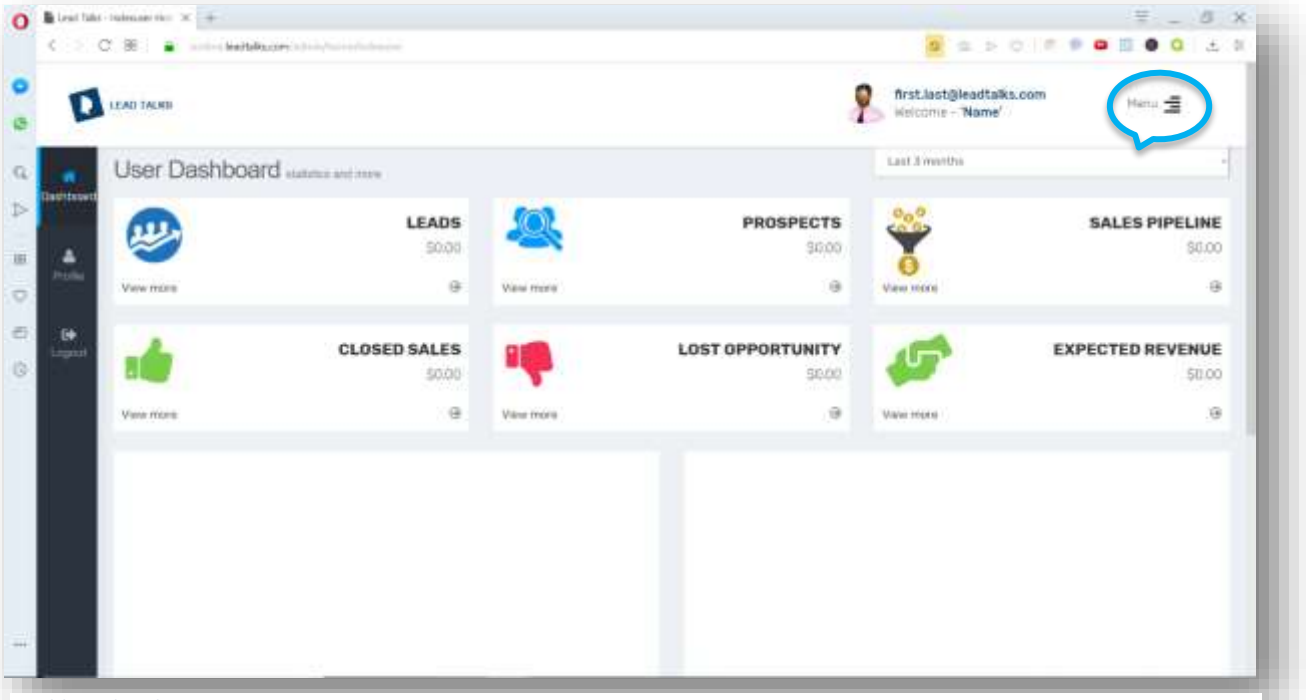


http://gma.leadtalks.com/admin/default/index

Email: your email address

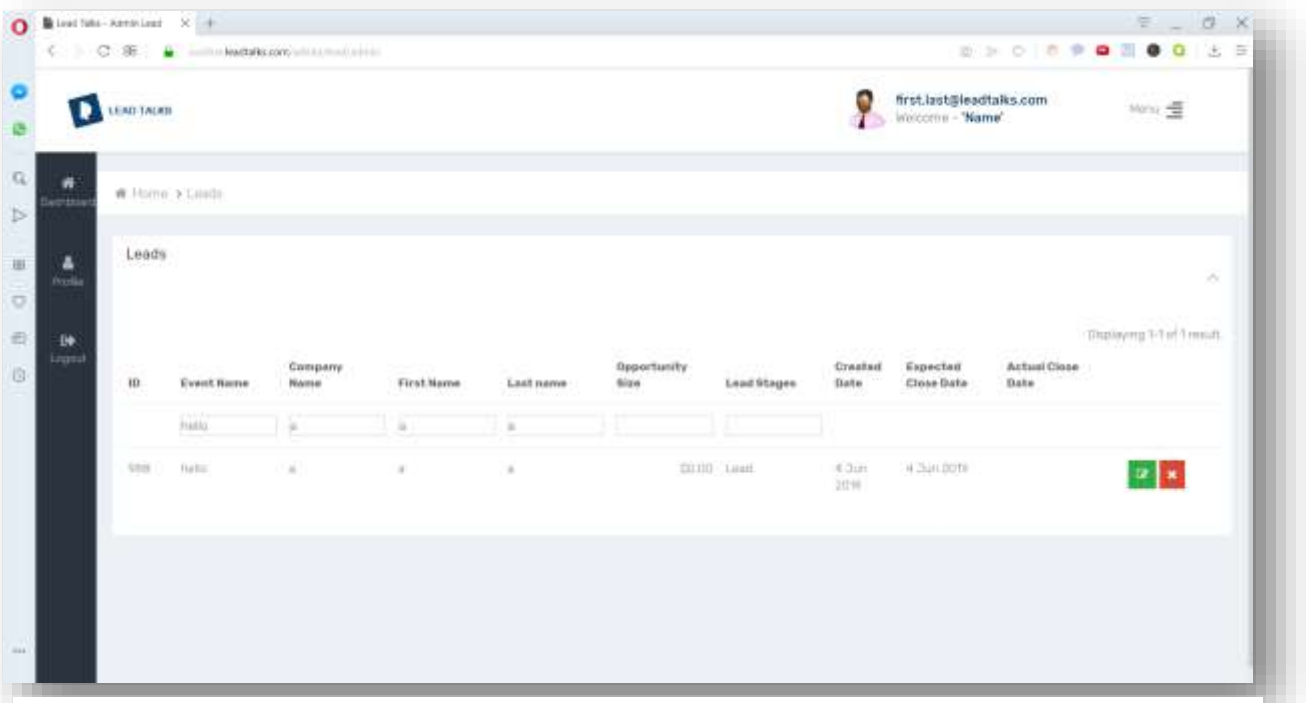
Password: ***password*** (Contact your administrator if it does not work)

Click “Login” to enter the portal.



Dashboard and Menu Options

Your first window is the User Dashboard. To see your leads, click on the arrow under 'LEADS' in the Menu.



Editing Lead Information

Search through your leads and add or delete activities associated with each lead.

Click on the green edit button in order to add activities or edit the information associated with the lead.

For further questions refer to the FAQs at https://leadtalks.com/faq/

or contact the LeadTalks staff at support@leadtalks.com.