

## Badge Scanning Instructions for Lead Retrieval with a Mobile App

The QR Code & Barcode Scanner app\* by TeaCapps makes it easy to scan DMC attendee badges and view key visitor information on a convenient spreadsheet.

### YOU WILL NEED:

- Free version (with ads) or Pro (paid) version of QR Code & Barcode Scanner app by TeaCapps
- A mobile phone or tablet
- Email
- At least one of the following: Excel, Google Sheets, or Numbers (Apple)

### DOWNLOADING THE APP

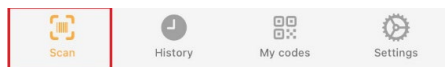
- Apple:
  - Download here: <https://apps.apple.com/app/id1048473097>
  - Or, go to the App Store. Search for 'qrbot.' Download 'QR Code & Barcode Scanner' by TeaCapps. The app has a QR code and teal border like the image to the right.
  - The app will appear on your home screen as 'QRbot.'
- Android:
  - Download here: <https://play.google.com/store/apps/details?id=com.teacapps.barcodescanner>
  - Or, go to the Google Play Store. Search for 'teacapps.' Download 'QR & Barcode Reader.' The app has a QR code and teal border like the image to the right.
  - The app will appear on your phone as 'QR Scanner.'



App Icon (not a real QR code)

The first time you use the app, you will encounter a series of intro screens. Tap 'Next' (→) to move through the screens and access the app. On the last slide, tap 'Learn More' to purchase the Pro version if you would like to scan multiple badges at once.

### HOW TO USE: SCAN



- If a pop-up appears and asks for access to the camera, hit 'OK.'
  - For Android, tap 'Scan using the camera.'
  - For Apple devices, if you are asked for permission to take pictures, tap 'Allow.'
- Point your phone's camera at the QR code and it will automatically scan. To scan another badge, tap 'Scan' at the top left.

### HOW TO USE: SETTINGS



- If you purchased the Pro version, you can scan multiple badges at once. Go to 'Settings.' On the right-hand side, there are 2 teal-colored switches. Look for the 3<sup>rd</sup> switch, titled 'Batch Scan,' and activate this switch.


### HOW TO USE: HISTORY



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- 'History' keeps a dated and time-stamped list of all badges scanned with the app. Tap on a scan to see First and Last Name, Business Type, Company Name, Address, Phone Number, and Email Address.

#### VIEW LEAD INFORMATION ON A SPREADSHEET:

- **In the 'History' section:**
    - Go to the top left corner of the screen. Tap 
    - Tap 'CSV.' The app will automatically create a CSV file for you.
    - Your phone will show a list of apps you can use to send the file. Choose your email app and email the file to yourself.
  - **On a computer:**
    - On a desktop, log into your email account and open the email you sent to yourself.
  - **Excel\* Instructions:**
    - In your email, click on the attachment and select 'Open in Excel.'
    - Click on column 'D.' The column should be outlined in green and the cells should be shaded gray.
    - At the top of the spreadsheet, you will see options like 'File,' 'Home,' and 'Insert.' Click on the option labeled 'Data.'
    - Click on 'Text to Columns' at the top of the spreadsheet.
- 
- A pop-up window with 2 circles will appear. The bottom circle is blue. Click so that the top circle next to 'Delimited' is blue, then click 'Next.'
  - There is now a row of checkboxes. The top checkbox next to 'Tab' is selected. Click on the checkbox to deselect it. Click the checkbox next to 'Other' to turn it blue. In the empty white box, press 'Shift' and '6' at the same time to enter a caret symbol (^).
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- At the bottom right corner of the box, click 'Finish.' A pop-up about replacing data will appear. Click 'OK.'
  - Your badge scan history will now appear in separate columns.
- **Google Sheets\* Instructions:**
  - In your email, click on the attachment to download the CSV to your desktop.
  - In Google Sheets, open a new spreadsheet.
  - At the top right of the spreadsheet, click 'File.' Click the option labeled 'Import'.
  - At the top of the pop-up, click 'Upload.' The word 'Upload' should be blue with a thin blue line beneath.
  - Click the blue 'Browse' button to find the CSV you downloaded. If you did not change the name, the file should begin with 'QRbot\_' or 'QRScanner\_'. Select the CSV, then click 'Open' at the bottom right.
  - In the pop-up window, click the green 'Import Data' button at the bottom of the pop-up window. The 'Separator Type' should be set to 'Detect Automatically.'

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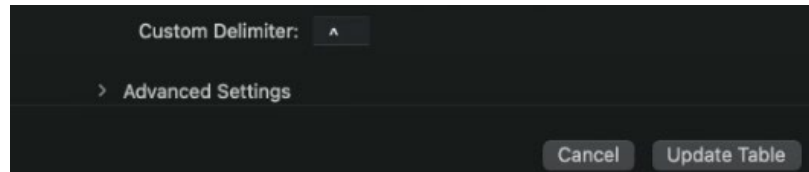
Import location      Separator type

Replace spreadsheet ▼      Detect automatically ▼

☒ Convert text to numbers, dates, and formulas

**Import data**      Cancel

- Your badge scan history will now appear in separate columns.
- **Numbers\* Instructions:**
  - In your email, click on the attachment to download the CSV to your Mac.
  - In Numbers, open a new spreadsheet and create an empty table.
  - Drag and drop the CSV you downloaded into Numbers. If you did not change the name, the file should begin with 'QRbot\_' or 'QRScanner\_'.
  - At the top right of the screen, a pop-up titled 'Table data was imported and can be adjusted' will appear. Click on the pop-up.
  - At the bottom of the window there is a row titled 'Custom Delimiter.' In the empty box, press 'Shift' and '6' to enter a caret symbol (^).



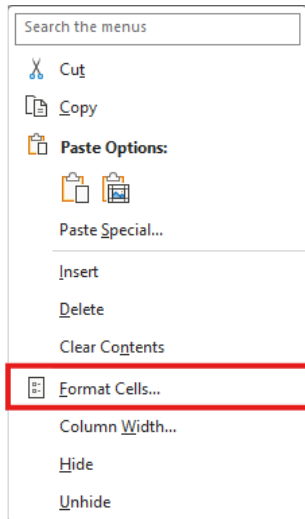
- Click 'Update Table.'
- Your badge scan history will now appear in separate columns.

## COMMON ISSUES (EXCEL)

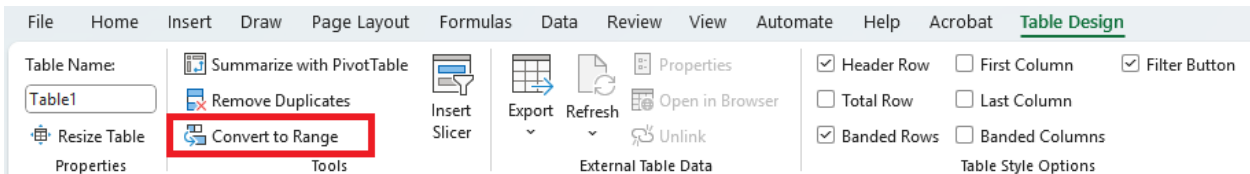
- **ISSUE: MERGED CELLS IN EXCEL**
  - Open the spreadsheet. You should be on the 'Home' tab.
  - Click on column A. The column should be outlined in green and the cells should be shaded gray.
  - On your keyboard, press Control (Ctrl) and 'A' at the same time. The entire spreadsheet should be shaded gray.

	A	B	C	D	E
1	DATE	QUANTITY	NAME	CODE	CONTENT
2	#####	1		352038^Jane^Doe^Independent Retailer^Test Buyer^1111 Main Street^DALLAS^TX^75216^USA^123@gmail.com^11111^17	15
3					
4					

- Right click on the 'A' at the top of the first column.
- Select 'Format Cells.'



- Navigate to the 'Alignment' tab.
- Uncheck the box next to 'Merged Cells.'
- Click 'OK.'
- The spreadsheet should now resemble this image. You should see that the entire spreadsheet is filled with lines. Proceed with the Excel instructions from the Badge Scanning instructions above.
- **ISSUE: TABLES IN EXCEL**
  - Open the spreadsheet. You should be on the 'Home' tab.
  - Hover over the top left corner of the table until you see a white cross. Highlight the entire table. The table should be shaded gray.
  - At the top of the screen, click on 'Table Design.'
  - Select 'Convert to Range.'



- Press 'OK.' Proceed with the Excel instructions from the Badge Scanning instructions above.

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