

Creating Qualifiers

1. + Add Qualifier (1/10)

7. Save Changes

* Qualifier 2. Favorite Animal

Delete Question 4. + Add Choice (2/15) 6. ⚙️

* Choice 4. Dog 3. E-Literature

5. + Add Sub Question (3/5) Sub Follow Up Questions Close Sub Questions

5a. Label: Type 5b. Question Type: Text Field Mandatory: Delete

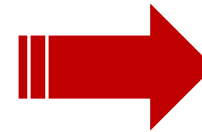
Label: Color Question Type: Text Field Mandatory: Delete

Label: Have as pet? Question Type: Check Box Mandatory: Delete

* Choice E-Literature

Cat

+ Add Sub Question (0/5) Sub Follow Up Questions



Tommy_2017 [0/0] S: ON

Leads List

SESSION DETAILS

Name: Test Session 1

Scanned In: 0

Start: 01/01 00:00

Test Session 1

QUALIFIERS

Favorite Animal

Dog

Type

Poodle

Color

White

Have as pet?

Cat

1. To create a qualifier, click the 'Add Qualifier' button. The number of qualifiers allowed is dictated in the parenthesis also included in the button. For example, (1/10) means you have created 1 qualifier out of the 10 allowed to be created.
2. Give the qualifier a name by typing in a title in the provided textbox.
3. Attach E-Literature to the qualifier by uploading a file or using a URL that will automatically be emailed to the attendee when qualified using the associated choice. (For additional information on E-Literature scroll down page)
4. Add choices to the qualifier by clicking 'Add Choice'. Amount limitations for this feature are dictated in parenthesis as well. Name each choice by typing the title into the provided textbox.
5. Add sub follow up questions to each choice by clicking 'Add Sub Questions'. Limitations for this feature are also dictated in the parenthesis.
- 5a. Write the follow up question you want to appear on the device screen in the 'Label' textbox.

5b. The question type to provide either a text field (user can type answer in field) or a check box (user can simply click a check box).

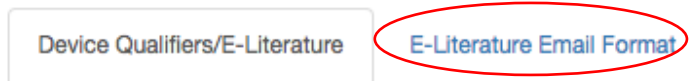
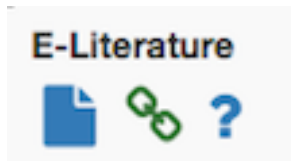
6. Additional qualifier options can be found by clicking the cog icon. This is where the qualifier can be made mandatory and/or allow multiple choice selections.

Mandatory - The user is required to select an answer from the available qualifier choices in order to proceed to the next lead.

Allow Multiple Selections - Allow the user to select more than one qualifier choice for this qualifier.

7. Once you are satisfied with the setup of the qualifier, always be sure to 'Save Changes' before exiting to save the created qualifiers.

E-Literature



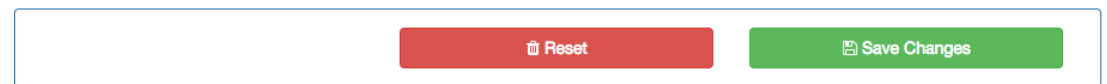
If E-Literature is uploaded to be attached to a qualifier, then a new tab will appear titled: 'E-Literature Email Format'.

In this tab, users will be able to customize the email content that is sent to the scanned attendees.

Users can customize the sender display name, the subject line, the body of the email and will have the option to bcc themselves on the email.

This email includes the chosen E-Literature links associated with the choices that the attendee was qualified as.

Configure Collateral Email Format



Sender Display Name 0/100

User-friendly display name in place of sender email address

* Subject 0/100

BCC Email 0/300

Blind copy an email on all emails sent. Separate multiple emails with a semicolon. Exclude all spaces.

* Body 0/15000

