PASSION | CARE | IMAGINATION | TRUST

CONVERGE™

BY CLARION EVENTS

Scanning How-To Guide

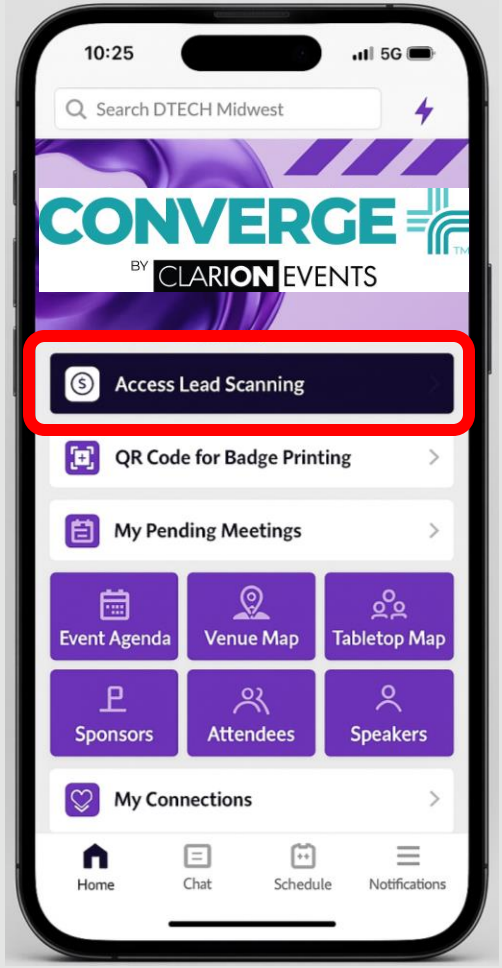
CLARION EVENTS

1 Access through the event app

Access the scan app directly within the event app

- No need to download multiple apps
- Simply click on the banner within the event mobile app to access scanning

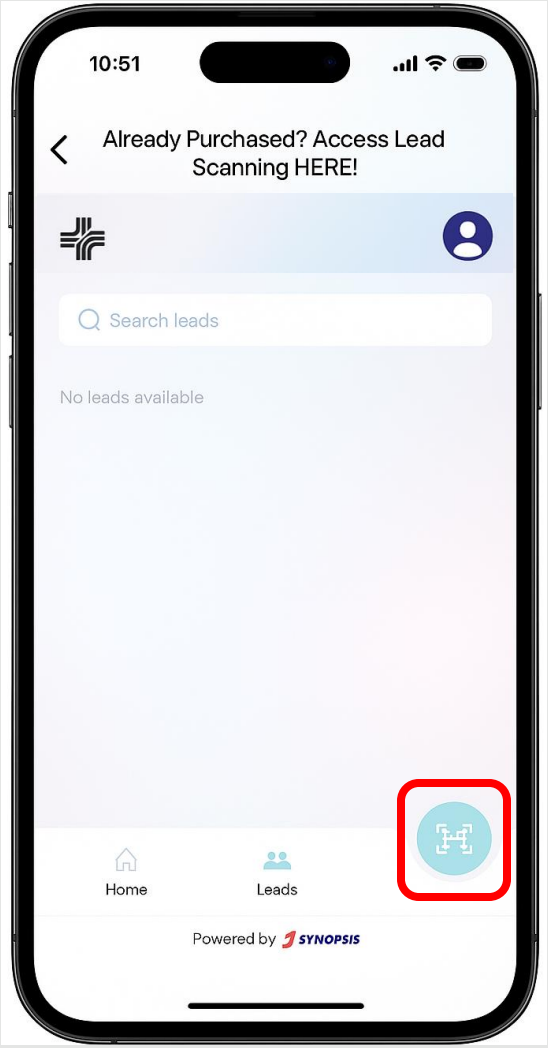
Note: You MUST be logged in to the event app with the same email you registered with for the scanner to sync with your registration



2 Begin Adding Leads

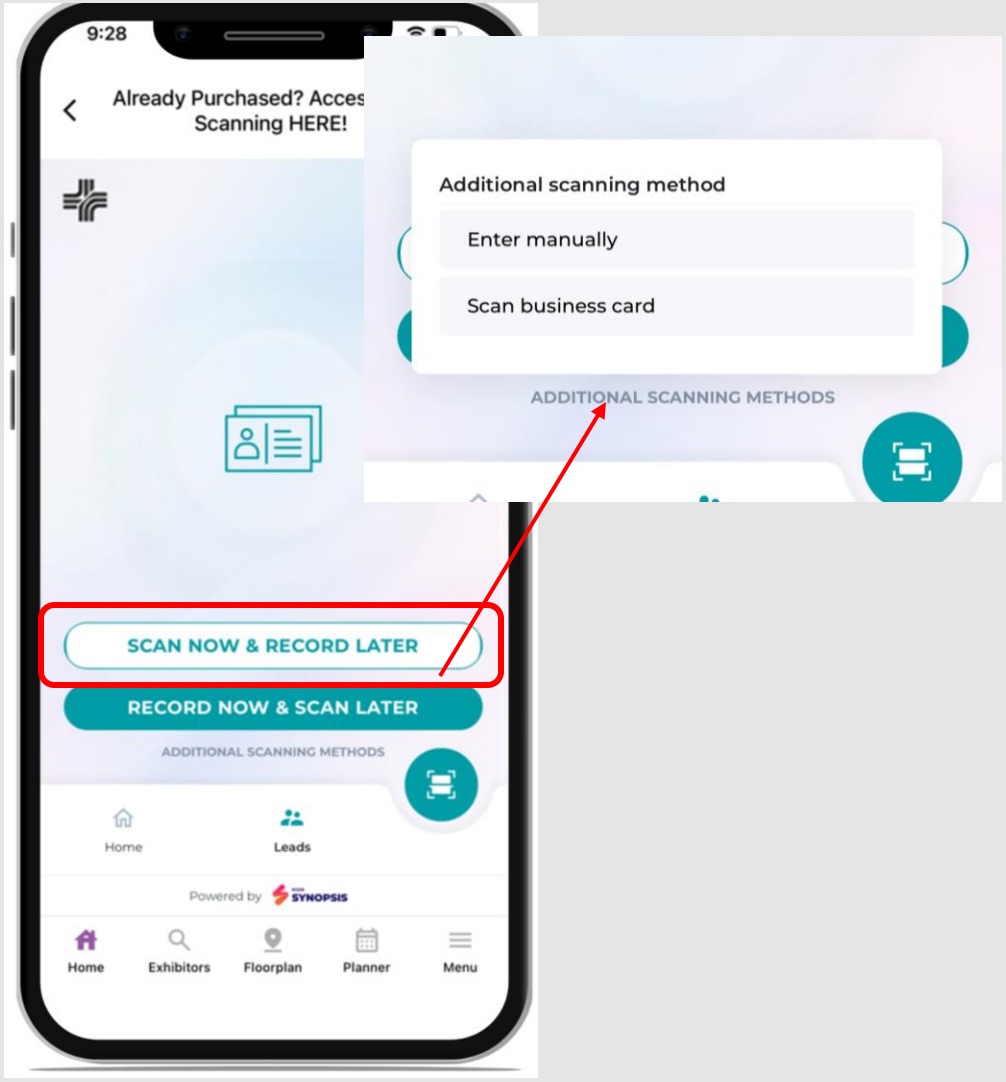
On this page, you'll be able to access your scanner:

- If this is your first scan, this page will be empty
- Tap the scan icon to access the scanner
- Tap the "Leads" button to view your leads
- *Note: the "Home" button is not active at this time*



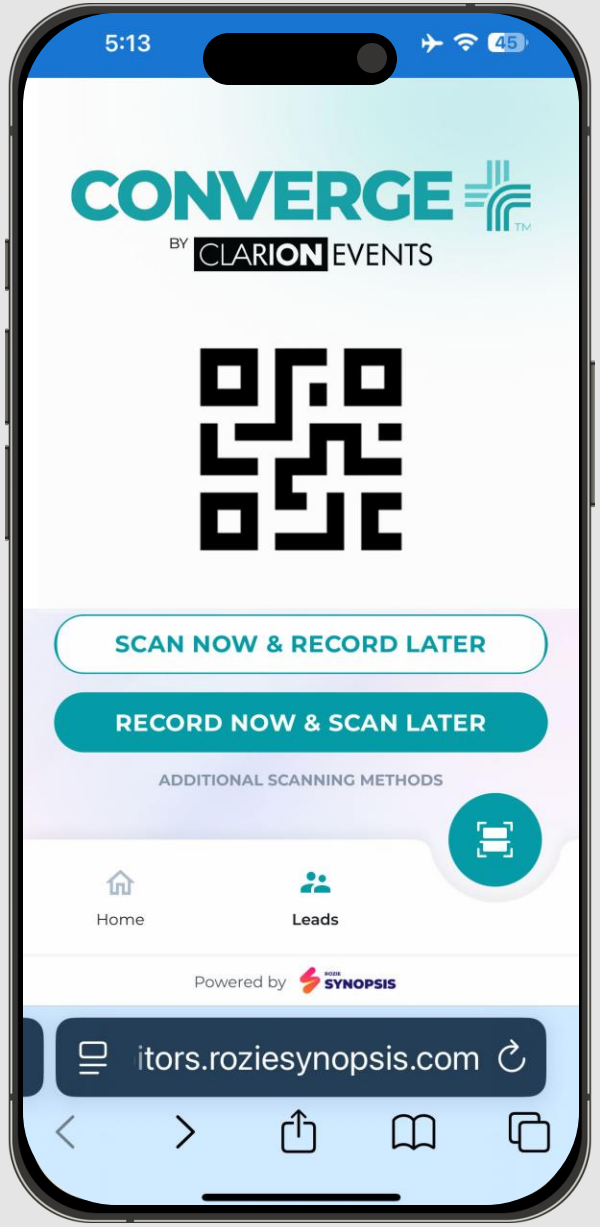
3 Select your scanning method

- **Scan Now & Record Later:**
  Scan attendee badges before starting your conversation.
- **Record Now & Scan Later:**
  Start your conversation, then scan the badge when it's convenient.
- **Additional Scanning Methods:**
  Access options for business card scanning or manual entry.



4 Scanning a badge

- **Allow camera access** if prompted *(usually only needed once)*
- **Aim at the badge's QR code** until the banner changes from **"processing" to "scan complete"**.
- The scanner **stays active for multiple badges**—great for group conversations.
- When finished, tap **"scanning done."**

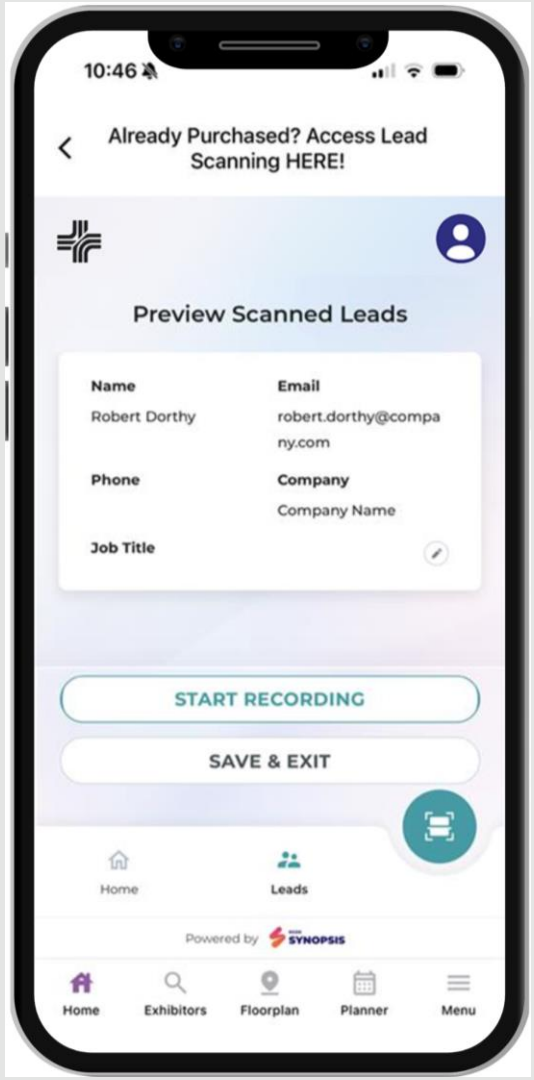


5 *Optional*: Record your conversation

After scanning a badge, choose to start a recording or save and exit

- **Start Recording:** Select this if the attendee agrees to recording the conversation
- **Save & Exit:** Select this if:
    - You're just scanning and moving on and don't plan to input any notes

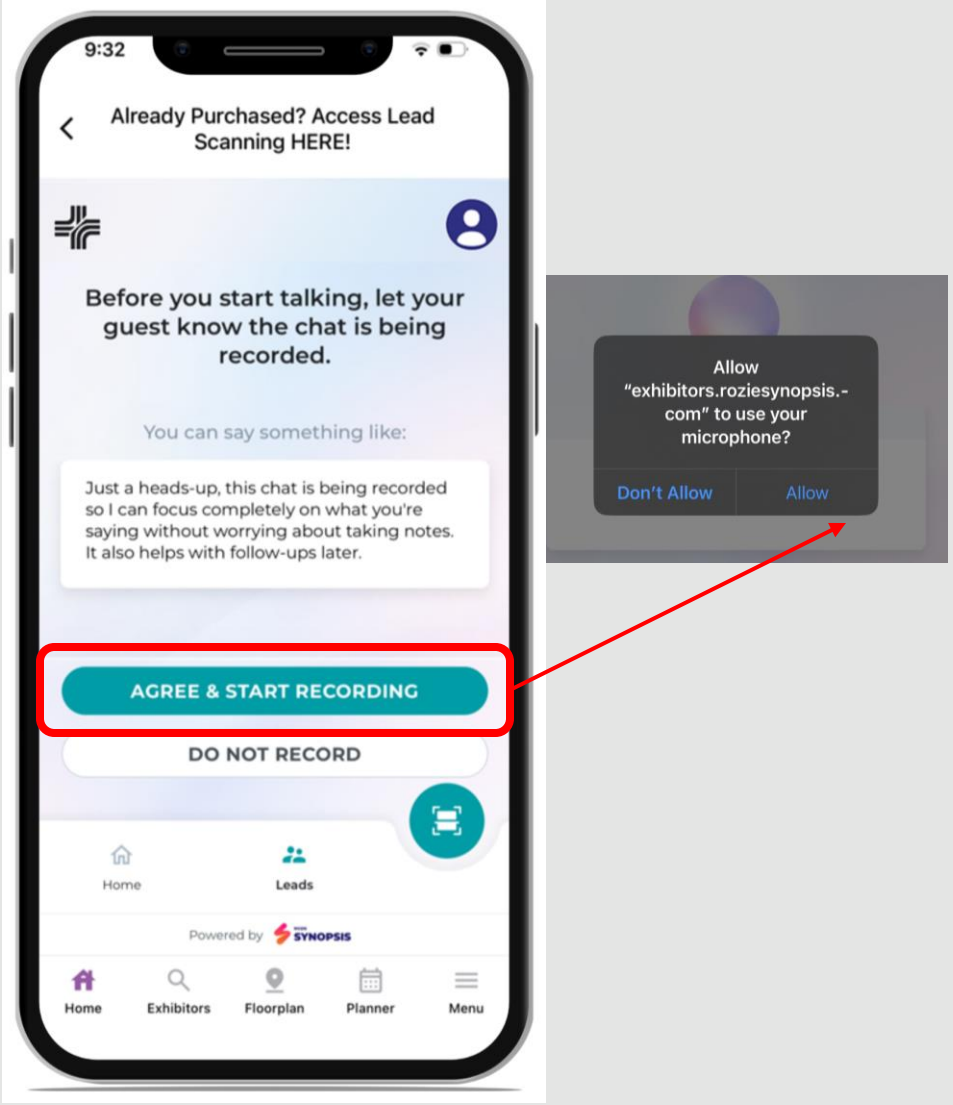
Note* If you want to add written notes, please make sure to hit "start recording" and then on the next screen hit "do not record." This is the ONLY way the notes field will populate!



6 Consent for Recording

Let everyone know the conversation will be recorded, as prompted (your onboarding legal language will appear).

- **If all agree,** tap “Agree & Start Recording” and allow microphone access.
- **If anyone prefers not to record,** tap “Do Not Record.” You can still add voice notes later if needed.

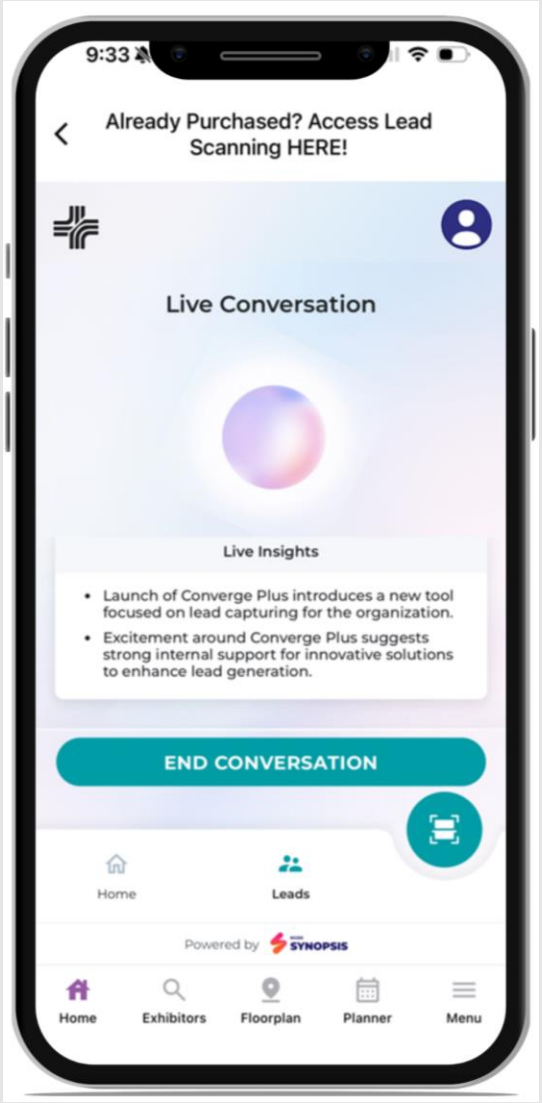


7 Focus on the Conversation – AI Does the Rest

Start your conversation and let **AI capture notes** automatically.

You'll **see insights appear** on the screen as you talk—no action needed.

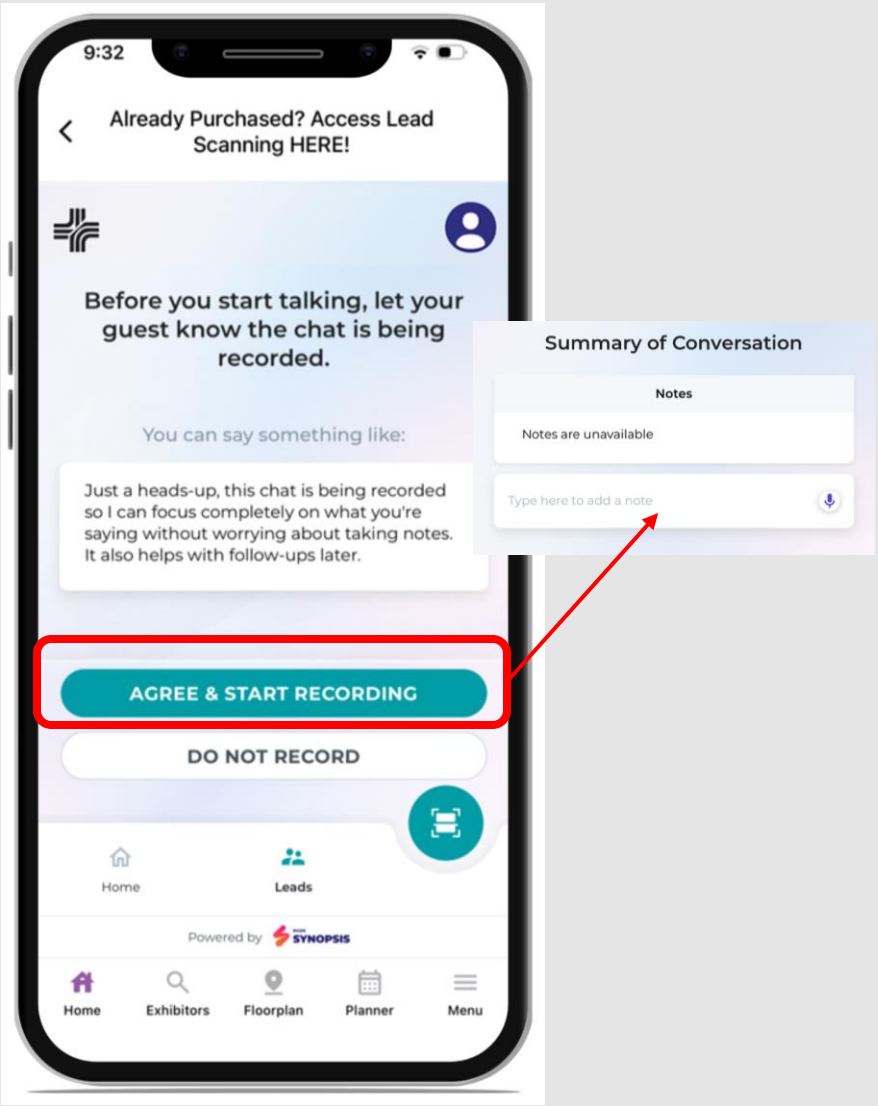
When you're done, just tap "End Conversation."



8 *Optional*: Add a voice note or written note

To add a note to the lead record, select:

- **Start Recording:** You'll then be prompted to the recording consent screen
- For a **voice note**, stay on this screen until the lead has walked away and then tap "agree & start recording" to record your voice notes. This will still generate live insights as if you were recording a conversation
- For a **written note**, tap "do not record" and then you're taken to a screen where you can add written notes

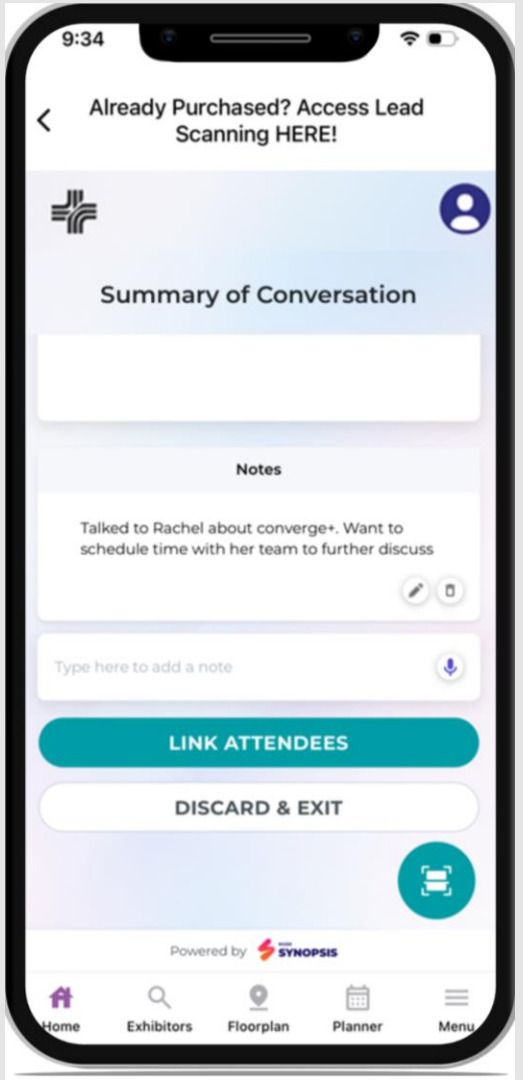


9 View Summary of Conversation

After ending your conversation, review the summary

- Full transcript
- Live Insights
- Key Points
- Products Discussed
- Action Items

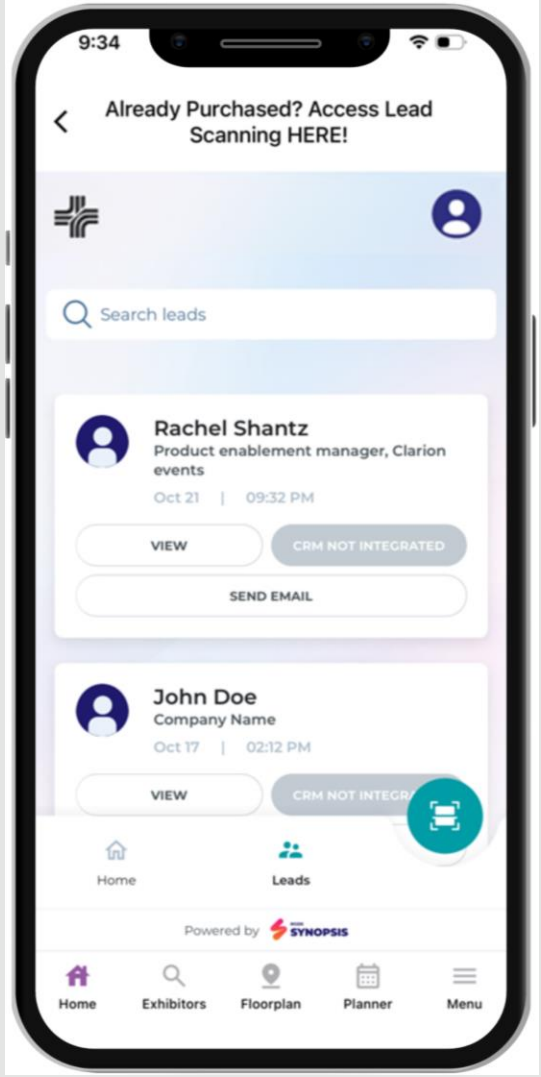
- **Edit notes (type or record voice)**
- **Link the conversation to scanned attendees.**



10 You've successfully recorded your lead!

Once you've completed any edits on the lead, you're officially ready to move on!

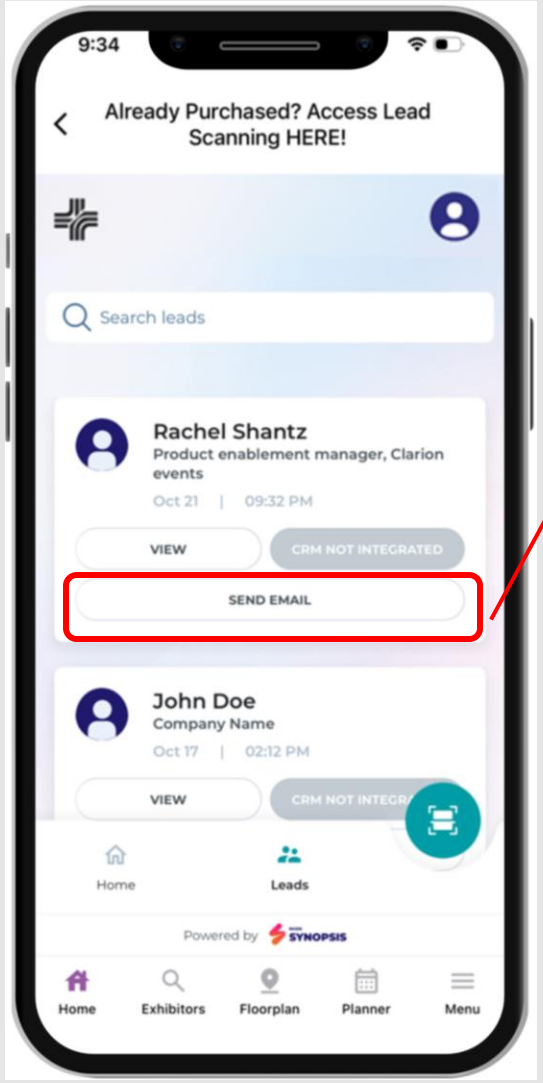
- From the home screen, you'll be able to see all of your scans
    - View lead details (and edit once you get there)
    - Send a follow-up email

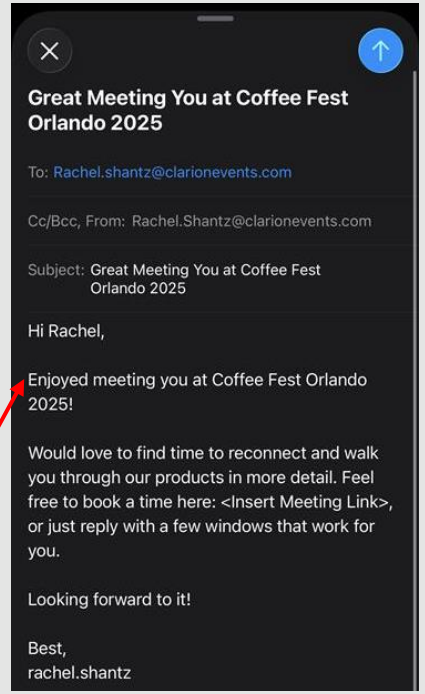


11 *Optional*: Send a follow up email

If you'd like to send a follow-up email through the scan app, it's easy!

- From the home screen, select "send email" on the lead you'd like to contact
- This will open in your phone's native/default email app
    - *Be sure to make sure the right email address is selected*
- The assets you uploaded during onboarding will auto-populate in the email, making it easy to do immediate follow-ups!
- *Future improvement on the roadmap: Templated email creation during onboarding*





12 *Optional*: Mark Lead Temperature

Quickly mark the leads you'd like to follow up with first

- From the lead details screen, tap "Lead Status"
- Mark the lead as Hot, Warm, or Cold depending on the status you'd designate that lead

