

NEW GROWTHPATH CRM FEATURE

Business-Card Scanner

From Booth to CRM in Seconds

Turn a stack of business cards into clean, event-attributed CRM contacts and logged engagements — without a single keystroke at the booth.



SNAP

Capture card or QR

MATCH

Recognize attendee

LOG

Create contact / activity

Meet people. Capture context. Prove event ROI.

GrowthPath closes the gap between a booth conversation and a clean CRM record while the lead is still warm.

! The old event problem

Reps come home with stacks of cards, partial notes, duplicate contacts, and no reliable way to prove which event created which opportunity.

✓ The GrowthPath answer

Upload the roster before the event. Scan cards or QR badges at the booth. GrowthPath reads, matches, routes, logs, and attributes the engagement.



Result: no spreadsheets at midnight, no re-typing, no cold leads, and no guessing which event produced the relationship.

Four phases. One smooth booth workflow.

The feature is built around the actual event lifecycle: preparation, capture, recognition, and attribution.

01 Before the Event

Create the event, load the attendee roster, validate the file, and approve the clean list for scanner recognition.

02 At the Booth

Rep scans a card or QR name tag. The system reads the details and prevents duplicate scan records.

03 The Match

GrowthPath checks CRM records and the staged event roster, then surfaces the best contact match.

04 Capture Engagement

Rep logs activity or opportunity in one tap. Everything is stamped with the event and project.

After logging, the rep is dropped right back to the capture screen with the same event still selected: rapid-fire scanning with almost no friction between handshakes.

Set it up clean. Then scan fast.

The admin prepares the event once, then reps capture cards in seconds from the booth floor.

Phase 1 — Set Up & Load the Roster

- 1 Create the event**

Admin enters event name, dates, and location. It is scoped to the organization, so no other tenant sees it.
- 2 Upload attendee list**

Pre-event roster is uploaded as a simple spreadsheet: name, email, company.
- 3 Review and approve**

Admin sees loaded, duplicate, and failed rows, then approves the clean list. Re-uploading a fixed file is always safe — duplicates are skipped automatically.

Phase 2 — Scan a Card

- 4 Capture in one tap**

Rep taps Scan Card or Scan QR Name Tag. Front and back photos are supported.
- 5 System reads it**

Name, title, company, email, and phone are extracted automatically, with no duplicate scans.
- 6 Smart account routing**

New contacts are matched to the right account by email domain or company — generic addresses like gmail are ignored, so strangers are never lumped together.

Recognition turns a scan into a CRM outcome.

The scanner is not just OCR. It connects the booth interaction to the right person, account, event, and project.

3 Phase 3 — The Match

The system checks the scan against CRM contacts and the uploaded event roster. It matches by email first, then by name, and tolerates small typos so close matches are still found. If multiple people could match, the rep taps the right one.

4 Phase 4 — Capture the Engagement

From the review screen, the rep taps Log Activity or Add Opportunity. GrowthPath creates or reuses the contact and stamps the activity / opportunity with the event and project.

Match priority

- | | | |
|---|-----------------------|------------------------|
| 1 | Email address | Best match signal |
| 2 | Name + company | Handles roster entries |
| 3 | Fuzzy name | Catches Jon vs. John |
| 4 | Manual pick | Only when needed |

Stamped every time

- | | | |
|---|------------------------|--------------------|
| ● | Contact | Created or reused |
| ● | Activity | Logged immediately |
| ● | Opportunity | Optional next step |
| ● | Event + Project | ROI attribution |



The booth never stops working. If the reader is unavailable or a photo is unreadable, the rep simply reviews and fills in the details by hand — the engagement is still logged.

WHY IT MATTERS

What this changes for your event team.

Less admin work, better data quality, and clean attribution from the first handshake.

✓ Speed at the booth

Snap, confirm, log — seconds per card, not minutes.

✓ No double data entry

Cards are read automatically and matched to people you already know.

✓ No leads lost

Every scan is saved the instant it's taken, and people you engaged are protected from accidental deletion in post-event cleanup.

✓ Real event attribution

Contacts and opportunities are tied to the event and project so marketing can measure ROI.

✓ Privacy-conscious design

Sensitive photo metadata, including GPS location, is removed before storage.

✓ Cleaner CRM data

Duplicate checks and account routing reduce messy records and manual cleanup.

Bottom line: GrowthPath turns event traffic into measurable CRM activity before the lead goes cold.



FEATURE SUMMARY

Built for high-volume event capture

From booth conversation to event-attributed CRM record — fast, clean, and privacy-aware.

Before

Event setup, organization scoping, roster upload, row validation, duplicate handling, and approval.

During

Mobile scan, QR badge support, front / back card photos, intelligent reading, duplicate scan protection.

After

CRM contact creation / reuse, account routing, activity / opportunity logging, event / project attribution.

GrowthPath Business-Card Scanner

From a stack of cards to clean CRM data — without the booth paperwork.