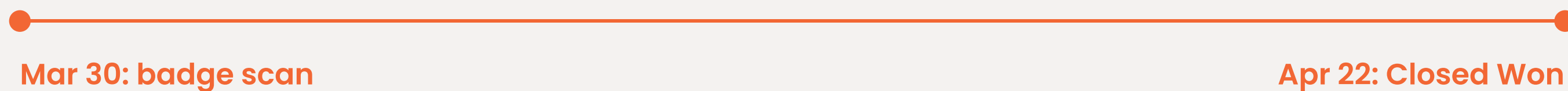


What Mobly data looks like in Salesforce

This is an example of a real lead from our booth at ExhibitorLIVE. Badge scan to Closed Won in 23 days, walked through record by record.
No mockups :)



It all kicks off with one badge scan

We first captured this lead at our booth on March 30th. Mobly enriched everything a badge scanner can't: verified work email, personal email, direct and mobile numbers, LinkedIn, firmographics, etc. Rep notes and qualifiers are visible.

Everything you see on this page makes it into your CRM.

My Events > ExhibitorLIVE 2026 [mobly_event_marketing] > Carly Homan



Carly Homan

Enriched

☆

Scan

 Created by austin@getmobly.com

 Created 3/30/2026, 7:06 PM UTC

Info

Events

Files

Activities

General Info

Email

@tnsinc.com

Personal Email

@hotmail.com

Job Title

Marketing Project Manager

Address

, United States

Phone Numbers

Added by Mobly

 ★  +1 -6190

 ★  +1 -2000

Company Info

Name

Track

Street Address

400 South 4Th Street

State

Minnesota

Country

United States of America

LinkedIn

<https://www.linkedin.com/company/track-hospitality-software/>

City

Minneapolis

Zip Code

55415

Social Media

LinkedIn

<https://www.linkedin.com/in/>

Facebook

<https://Facebook.Com/>

X (Twitter)

-

Description

Came to booth and speaking session, interested, especially in integrating with HubSpot.

Qualifiers

Lead Type	Follow up	# of Events	Next Event	Pulse Sequence?
Prospect	Demo Set	11-25	< 60 days	

Verified work + personal email

02

Real fields, right data types, mapped how you want

Every enriched value drops into a properly typed Salesforce field: emails, phones, URLs. You map it per object, to standard or custom fields, so your validation rules keep doing their thing.

For any fields your team fills in by hand, "Write if Blank" tells Mobly to only touch the empty ones and leave the rest alone.

Lead Information

Details

Lead Information

Lead Status	Qualified		Lead Source	Event
Name	Carly Homan		Lead Source Detail - Original	ExhibitorLIVE 2026
Company	Track		Lead Source - Original	Event
Matched Account	Track Hospitality		Lead Owner	Austin Oldroyd
Domain	tnsinc.com		Lead Source Detail - Most Recent	ExhibitorLIVE 2026 - Zach's Speaking Session
Title	Marketing Project Manager			
Email	@tnsinc.com			
Phone	+1 -6190			
Mobile	+1 -2000			
LinkedIn Profile	https://www.linkedin.com/in/			
Facebook	https://facebook.com/			
Company LinkedIn	https://www.linkedin.com/company/trackhospitality/			
moblyPersonalEmails	@hotmail.com			
moblyIndividualAddress	, United States			
Website	https://trackhospitality.com/			
Industry	Technology			
No. of Employees	150			

We set the original lead source as 'Event' for net-new records, with the detail being the event name from Mobly. That's just one way to store lead source info.

Once original lead source is set for a net-new lead, we write the most recent lead source with any new scans. In this case, a speaking session Activation within Mobly.



No imports, no dupes. Only matched leads.

Before it creates anything, Mobly checks whether the record already exists, in a set order: Contact ID, Contact email, Lead ID, Lead email. Nothing matched here, so it spun up this Lead, set the owner, and tagged Lead Source as 'Event'. **You choose the matching strategy when you connect:** Leads and Contacts, Leads only, or Accounts and Contacts. If you go with the account strategy, Mobly also matches the company to your existing Accounts by domain or name.

MATCH ORDER

Contact ID → Contact email → Lead ID → Lead email



Sales Home Leads Accounts Contacts Opportunities Quotes Campaigns Forecasts Reports Dashboard

Lead Carly Homan

Company Track Title Marketing Project Manager Phone (2) +1 -6190 Email @tnsinc.com Lead Source Event Lead Owner Austin Oldroyd

> ✓ ✓ ✓

Activity Details

Lead Information

Lead Status	Qualified	Lead Source	Event
Name	Carly Homan	Lead Source Detail - Original	ExhibitorLIVE 2026
Company	Track	Lead Source - Original	Event
Matched Account	Track Hospitality	Lead Owner	Austin Oldroyd
Domain	tnsinc.com	Lead Source Detail - Most Recent	ExhibitorLIVE 2026 - Zach's Speaking Session
Title	Marketing Project Manager		
Email	@tnsinc.com		
Phone	+1 -6190		
Mobile	+1 -2000		
LinkedIn Profile	https://www.linkedin.com/in/		
Facebook	https://facebook.com/		
Company LinkedIn	https://www.linkedin.com/company/trackhospitality/		
moblyPersonalEmails	@hotmail.com		
moblyIndividualAddress	United States		
Website	https://trackhospitality.com/		
Industry	Technology		
No. of Employees	150		

IRL Data - Mobly

Mobly Event Name	ExhibitorLIVE 2026	Mobly ID	c2f1c625-b6f8-4ec8-b251-bde3b47c36ca
Mobly Description	Came to booth and speaking session, interested, especially in integrating with HubSpot.	Follow Up	Demo Set
Mobly All Scanned Events	ExhibitorLIVE 2026, ExhibitorLIVE 2026 - Zach's Speaking Session	Lead Type	Prospect
moblyNumberOfScans	2		
Last Scanned Event	ExhibitorLIVE 2026 [mobly_event_marketing]: Zach's Speaking Session		
Last Scanned By	austin@getmobly.com		
Mobly First Scanned By	austin@getmobly.com		

Scanned twice. Still one record.

She got scanned at our booth, then again at our session. Most scanners would spit out a duplicate. Mobly just bumped the scan count and logged both touch points on the same Lead. The booth qualifiers came through as real field values, and the Mobly ID hands your admin a solid audit key back to the source.

The more ‘# of scans’ increments, the more IRL touch points you've had with this lead, which is pretty powerful for lead scoring workflows.

IRL Data - Mobly

Mobly Event Name	ExhibitorLIVE 2026	Mobly ID	c2f1c625-b6f8-4ec8-b251-bde3b47c36ca
Mobly Description	Came to booth and speaking session, interested, especially in integrating with HubSpot.	Follow Up	Demo Set
Mobly All Scanned Events	ExhibitorLIVE 2026, ExhibitorLIVE 2026 - Zach's Speaking Session	Lead Type	Prospect
moblyNumberOfScans	2		
Last Scanned Event	ExhibitorLIVE 2026 [mobly_event_marketing]: Zach's Speaking Session		
Last Scanned By	austin@getmobly.com		
Mobly First Scanned By	austin@getmobly.com		

Both IRL interactions, one lead

Stable audit key

Demo set at the booth (custom tag)

Number of scans: 2 (booth + speaking session activation)



Every touch, logged as activities

- 1.) Booth scan, logged.
- 2.) Auto follow-up email a few minutes later, logged.
- 3.) Session scan, logged.
- 4.) Second auto follow-up, logged.

All on March 30th 🥳

Then the humans jump in: intro call, demo, onboarding. Scans, Pulse emails, calls, texts, and meetings all land as Tasks on the record, so reps and reports get the full story without ever leaving Salesforce.

23 days

>

📅

Track + Mobly Training

Vanessa Gabor had an event

10:00 AM

>

✉️

Re: Track + Mobly: Onboarding Call recap

choman@trackhospitality.com sent an email to Vanessa Gabor

9:54 AM

>

📋

Mobly: Lead Scanned

Zach Barney had a task

>

📋

Meeting Purpose: Mobly onboarding call covering contract review, platform setup including users, ev...

Vanessa Gabor had a task

>

📅

Mobly Onboarding Call

Vanessa Gabor had an event with Amanda Podina and 2 others

8:30 AM

>

✉️

Re: Track / Mobly Follow Up

Vanessa Gabor sent an email to Coby Rich and 2 others

7:33 AM

>

✉️

Re: Track / Mobly Follow Up

Austin Oldroyd sent an email to Coby Rich and 3 others

5:28 PM

>

📋

Meeting Purpose: Mobly demonstrated its event platform to Track, addressing their need for unified I...

Austin Oldroyd had a task

>

📋

Meeting Purpose: Austin from Mobly introduced their lead capture platform to the TRACK team, discu...

Austin Oldroyd had a task

▼ March • 2026

4

>

📋

Sent Thanks for coming to my session!

Austin Oldroyd had a task about Track- Annual

>

📋

Mobly: Lead Scanned at ExhibitorLIVE 2026: Speaking Session

Zach Barney had a task

>

📋

Sent Great to meet you Carly!

Austin Oldroyd had a task about Track- Annual

>

📋

Mobly: Lead Scanned at ExhibitorLIVE 2026

Austin Oldroyd had a task about Track- Annual

No more past activities to load.

(HubSpot marketing emails)



Event attribution basically builds itself

Connect a Mobly event to its Salesforce Campaign once and every capture just flows in. In this example: 115 leads, 16 converted, 14 opportunities, roughly \$378,000 in pipeline against \$3,200 of actual spend. Responses show zero because we synced every capture as Sent for this event instead of splitting Sent and Responded. (The statuses are yours to set, and the next page shows how far that can go.)

\$378K

pipeline

\$3,200

actual cost



Search...

Sales

Home

Leads

Accounts

Contacts

Opportunities

Quotes

Campaign

Campaign

Event - ExhibitorLIVE 2026

Type

Status

Start Date

End Date

Event

In Progress

3/30/2026

4/2/2026

Related

Details

Campaign Name

Event - ExhibitorLIVE 2026

Campaign Owner

Jesse Green

Active

☒

Status

In Progress

Parent Campaign

Events 2026

Start Date

3/30/2026

Type

Event

End Date

4/2/2026

Description

ExhibitorLIVE trade show. Booth + speaking session.

Planning

Num Sent in Campaign

0

Budgeted Cost in Campaign

\$3,000

Expected Response (%)

0.00%

Actual Cost in Campaign

\$3,200

Expected Revenue in Campaign

\$20,000

Campaign Statistics

Responses in Campaign

0

Leads in Campaign

115

Converted Leads in Campaign

16

Contacts in Campaign

18

Opportunities in Campaign

14

Won Opportunities in Campaign

1

Value Opportunities in Campaign

\$390,709

Value Won Opportunities in Campaign

\$28,000

115 leads, added automatically

07

Leads become Campaign Members, not a spreadsheet

Every attendee is a Campaign Member record, Lead or Contact, with a Member Status Mobly sets at sync. You can also drive that status from a booth qualifier, so "demo set" lands as Responded while a quick scan lands as Sent. Your campaign influence reporting ends up reflecting what actually happened on the floor.



Sales

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Reports

Search...

Campaign

Event - ExhibitorLIVE 2026

Type

Status

Start Date

End Date

Event

In Progress

3/30/2026

4/2/2026

Related

Details

Campaign Members (6+)

Add Leads

Add Contacts

Type	Status	Name	Title
Contact	Sent	Aaron Thelen	Buyer
Contact	Sent	Vanessa Gabor	Customer Success
Contact	Sent	Keara M Piekanski	Vice President of Marketing & Com...
Contact	Sent	Carly Homan	Marketing Project Manager
Lead	Sent	Deanna Krause	Trade Show and Event Consultant ...
Lead	Sent	Jason Heichlinger	Chief Executive Officer
View All			

Campaign Hierarchy (0)

Campaign Member Statuses (2)

New

Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Responded	☐	☒	3/26/2026, 3:33 PM
Sent	☒	☐	3/26/2026, 3:33 PM
View All			

Accounts (6+)

[Behr Paint Company](#)

Industry: Consumer Goods

Account Type: Prospect

Account Phone: +1 3815

[Careington Internati...](#)

Industry:

Account Type:

[Care Credit](#)

Industry: Financial Services

Account Type:

Account Phone: +

[Deckel & Moneypen...](#)

Industry: Marketing And Advertising

Account Type: Prospect

23 days from badge scan to Closed Won

The deal closed April 22nd at \$28,000, and Primary Campaign Source points right back to the ExhibitorLIVE Campaign.

FYI: Mobly doesn't create Opportunities. Sales converted the Lead through your normal process, and since Mobly had already made her a Campaign Member, the attribution carried through on its own.

Opportunity

Track- Annual

Account Name

Track Hospitality

Stage

Closed Won

Close Date

4/22/2026

Primary Campaign Source

Event - ExhibitorLIVE 2026

Amount

\$28,000.00

Opportunity Owner

Austin Oldroyd

>

✓

✓

✓

Conversations (4)

Contact Roles (1)

Products (3)

Quotes (0)

Partners (0)

Notes (0)

Activity

Details

Gong

Quote

History

Opportunity Name

Track- Annual

Opportunity Owner

Austin Oldroyd

Account Name

Track Hospitality

Close Date

4/22/2026

Type

New Business

Amount

\$28,000.00

Stage

Closed Won

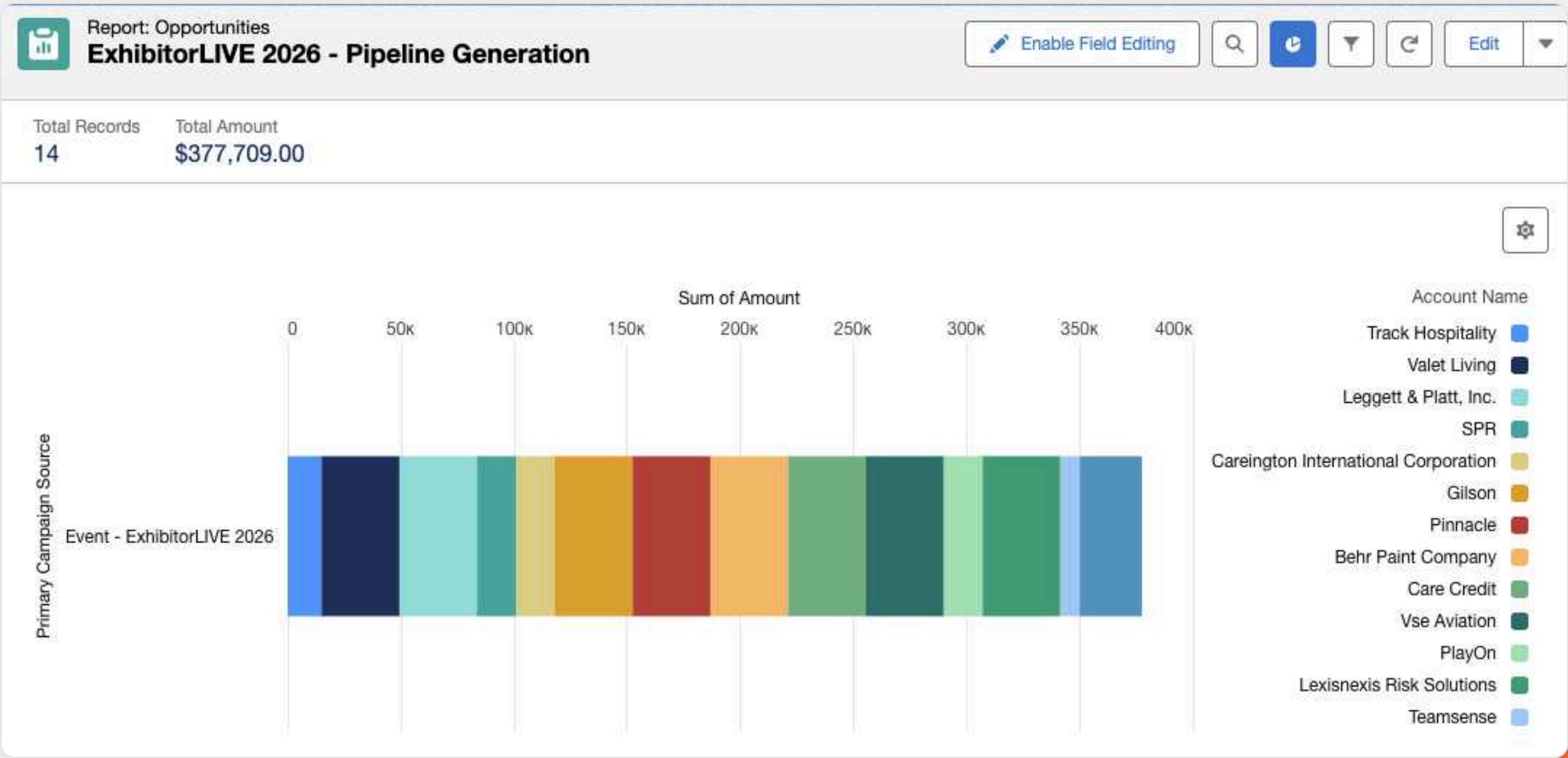
ARR_Calculated ⓘ

\$37,333.33

09

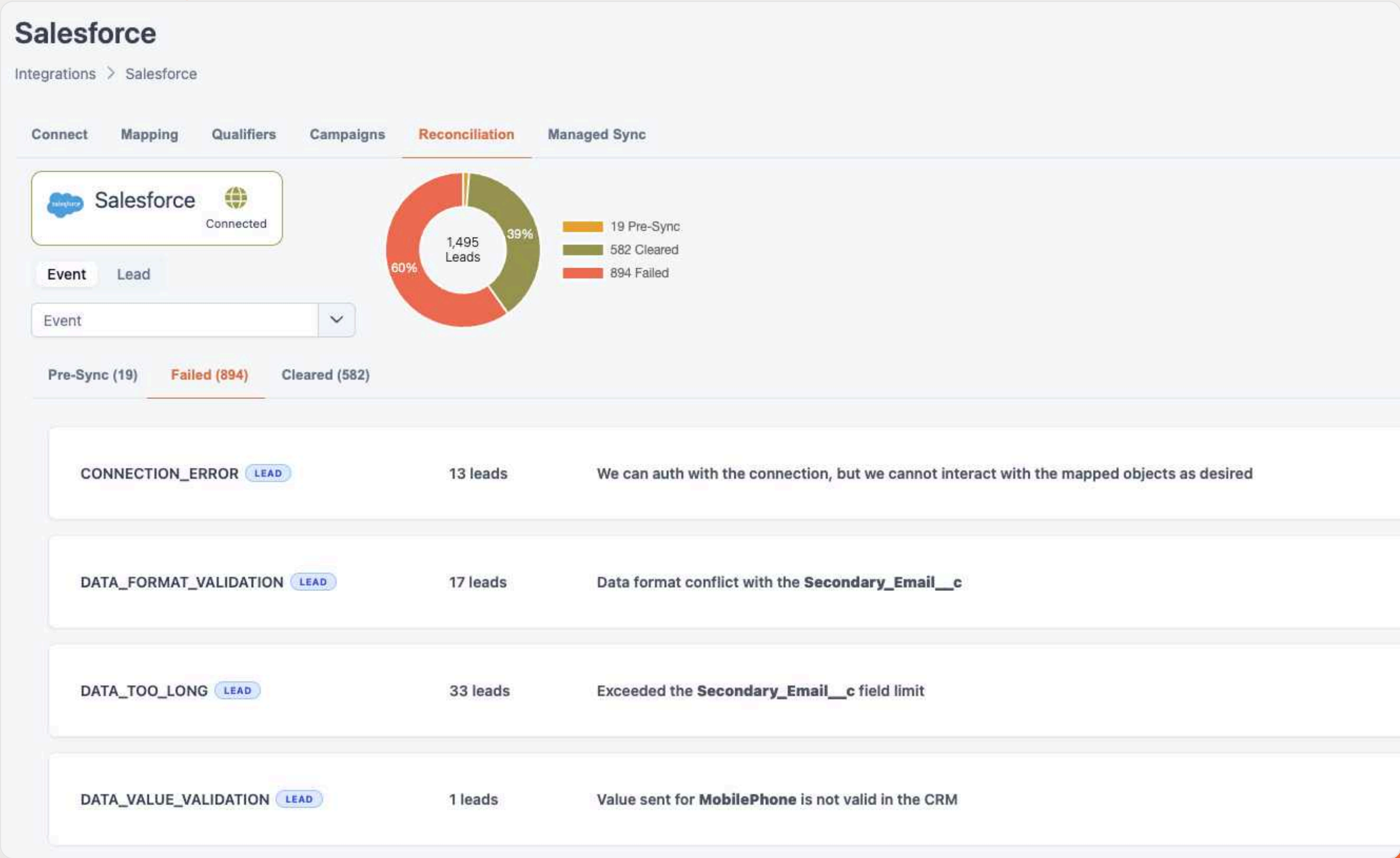
Built in Salesforce, supported by clean IRL data

Pipeline generated from ExhibitorLIVE. Every bar is here because a Campaign Member record ties that deal to the event. Everything in this deck lives on standard objects: Lead, Contact, Account, Campaign, Campaign Member, Task, Opportunity. Any admin can rebuild this report in ten minutes with a standard report type.



Reconciliation gives you visibility into real-time sync status

When a write fails, nothing vanishes. Your validation rules and required fields will reject a write eventually, and that's fine. The lead lands in Reconciliation, grouped by error type, with an Integration Log showing the raw error Salesforce returned and exactly what Mobly sent. Most fixes happen in-app through a Fix-It drawer, remap the field, retry per lead, per category, or all at once, and watch the queue clear.



What your ops person might be wondering about

1 What permissions are required?

Answer: A Salesforce user with API access and create/edit on Lead, Contact, and Account, plus Campaign read and Campaign Member create/edit. Keep it scoped as a least-privilege integration user.

2 What control do I have on data syncing?

Answer: Automatic sync by default, so leads land minutes after enrichment. Or park everything in a manual review queue mid-event or during a CRM change. Write if Blank keeps any field your team curates safe.

3 What's setup like and how long does it take?

Answer: About 30 minutes, through standard Salesforce OAuth. No Connected App or Consumer Key for you to build or maintain. And if you ever need to pause, Disable stops the sync while keeping your connection and every mapping intact.

A couple of limits worth calling out: no Opportunity sync yet (convert Mobly-created Leads with a Flow), and one CRM per Mobly org.