Modifying Transactions from The Reporting Portal

Summary

Modifications to captured transaction can be made in the reporting portal. As of portal version 1.144, the only portions of a transaction that can be modified are the Qualifiers, Notes, Session, Device ID and Device Timestamp. This may change in the future with portal version updates.

Changes made in the reporting portal do not automatically reflect in the SwiftLeads app without the device parameter *Option – Unique Booth Leads* being enabled. Check out FAQ document *Unique Booth Leads* for additional information. This feature can only be enabled by a manager; it may cannot be enabled by an exhibitor or non-manager account.

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Open Transaction Modification Window

1. After signing into the Swiftium Reporting Portal, navigate to the *Leads / All Scans* Tab. This will display all the transactions available to the logged in user.

2. Once you have selected a transaction, a red button labeled *Edit Selected* will appear on the Web Table Options bar.

3. After clicking *Edit Selected*, a page will open that allows you to modify the transaction's qualifiers, session, device timestamp, note and device ID. Note the user must be granted permission to modify the device Id.

4. After clicking *Edit Selected*, you should see this Modify Transaction window open. This window is where all modifications will be made to the transaction.

Qualifiers

The qualifier section will on be present when the transaction has qualifiers associated to it. Association occurs when the transaction is original captured. The associated qualifiers are determined from the qualifiers that are configured in the SwiftLeads app.

Qualifiers are designated using an orange header. The header contains the qualifier title and assigned attributes. There could be none or up to two attributes per qualifier. The two attributes that could be assigned to a qualifier symbolize Required Response (Red Asterisks) and Single Response (Green Bulls Eye)

> **Required Response** - A selection must be made for the qualifier to save changes.
> **Single Response** - A maximum of one selection may be made for the qualifier. However, if the *Single Response* icon is not present, then multiple selections may be made.
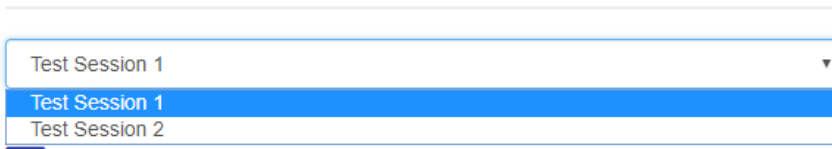
Notes

The notes free form multi line text box that is always available for modifications. The maximum length the note can be is 500 characters.
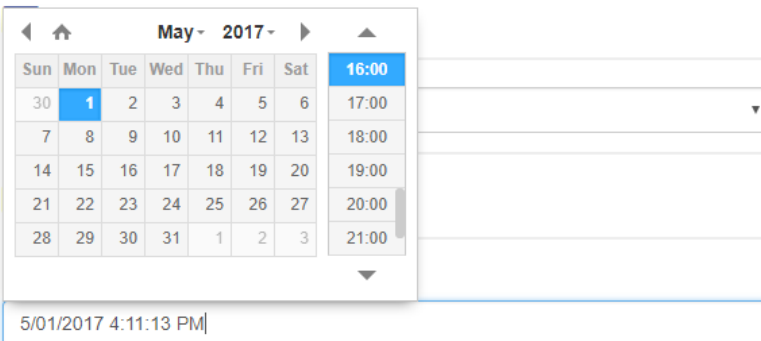
Session

The session selection drop down box will only be available when the show is configured for session tracking modes (Attendance Tracking, Access Control, Already Tagged, Ticketing) The drop down will only be populated with the predefined show's session list. This is not a free form text box.

Device Timestamp

The device timestamp can be found under the *Properties* section. Clicking instead the text box will open a calendar to select a date and an hour. Minutes can be adjusted by modifying the text box contents rather than the using the calendar popup.
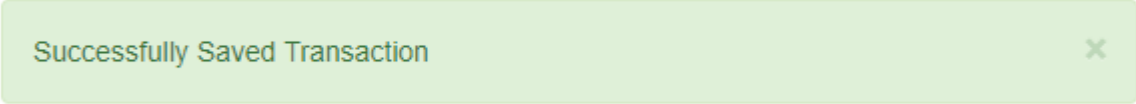

Device ID

The Device ID will only be available for modification when the user has been granted permission to modify the Device ID through the *User management* panel. Only manager accounts may grant another user this permission.

Saving

After making all desired modifications, be sure to click the green *Save Changes* button, located towards the top of the page. If you wish to exit or cancel modifications before saving changes, then select the red *Exit button*, located beside the *Save Changes* button.

Successfully saved transaction modifications will be accompanied with a green notification at the top of the window. See example below.

Successfully Saved Transaction   ✕