Onsite Inventory Products
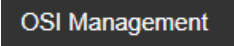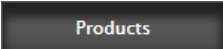
Create an unlimited number of products that can be used to track the quantity each customer has purchased.

Summary: Products are a simple mechanism that houses the quantity a customer is supposed to receive. These product quantities can be altered at anytime from anywhere due to the inventory system being available on all internet enabled devices. Currently, products are only used for reference for onsite staff.

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Logging in to the Onsite Inventory Management Portal

1. Go to Swiftium.co.

2. Enter your credentials and click *Exhibitor Portal*.

3. Click on [OSI Management] in the footer of the page.

4. Click [Products]

Creating a new Product

1. Click the green plus button to begin creating a new product.

Existing Products

Create New Product ✚

2. A product entry form will appear. Enter a product name that is unique to your account.

Product Name

Example Product

Cancel   Create

3. Press the *Create* button when all information has been entered. A new product will appear in list of account products.

Modifying an Existing Product

1. From the list of products, click the black pencil icon on the sub accounts record.

   Example Product   X ✏

2. This will open a similar form the to the create form but the button will indicate to *Save Changes* rather than *Create*.

   Product Name
   Scanner
   Cancel | Save Changes

Deleting a Product

   Note – Attempting to delete a product that is associated to an event will result in an error message. It's required to remove the association before deleting.

1. From the list of Products, click the red **X** icon on the product.

   Example Product   X ✏

2. The entry form with the products information will appear. Confirm the information in the form is the product that is to be deleted.

   Product Name
   Scanner
   Cancel | Delete

3. Press the *Delete* button

4. A message at the top of the page will appear indicating the result of the action. A successfully deleted product will display the message *Successfully Delete Product.*
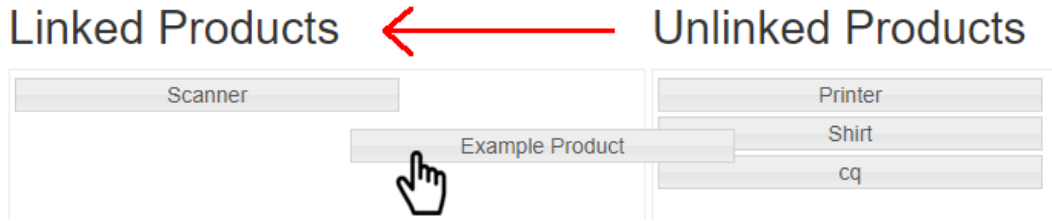
Associating Product to an Event

1. From the OSI management page select the *Events* Tab.

   Events

2. Find the event, in the *Existing Events* list, you would like to associate a product with. Click the black square icon to open the Event details.

   Pat Test

3. Navigate to the *Products* Tab.

   Products

4. There will be two groups of products indicating which products are associated to the selected event. *Linked Products* are available for use in the onsite inventory and *Unlinked Products* are not available.

5. Simply dragging a product from the *unlinked products* box to the *linked products* box will make it available for use in the selected event. Doing the opposite will result the product not being available in the selected event.

6. Once all products have bene moved into their desired group. Press the *Save* button at the top of the page to commit changes to the portal.

Uses in the Onsite Inventory

- **Customer profile product entry Form**. This form can be accessed after a customer profile has been created. The quantities can be modified by any user that has access to the event.

- **Customer Import Wizard**. Product quantities can be uploaded with the customer profile information during the customer profile import process. The import wizard will have a designated column for each product associated to the event.