Onsite Inventory System Manual

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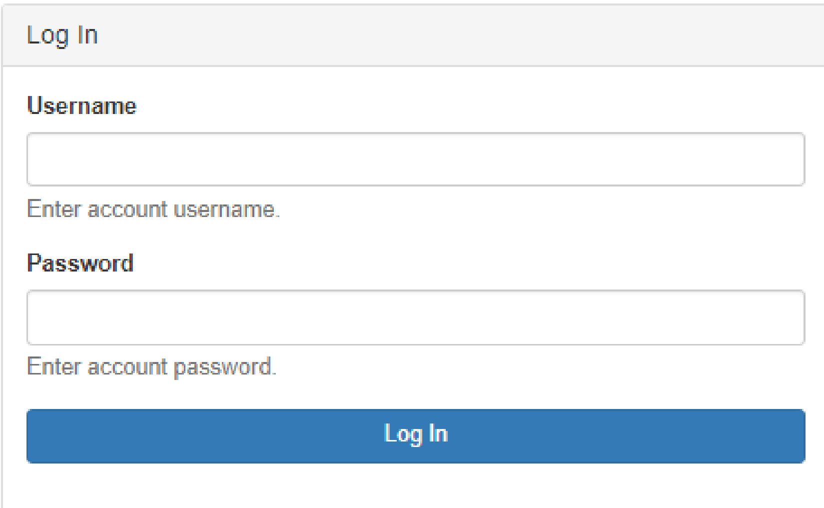
I. Logging In

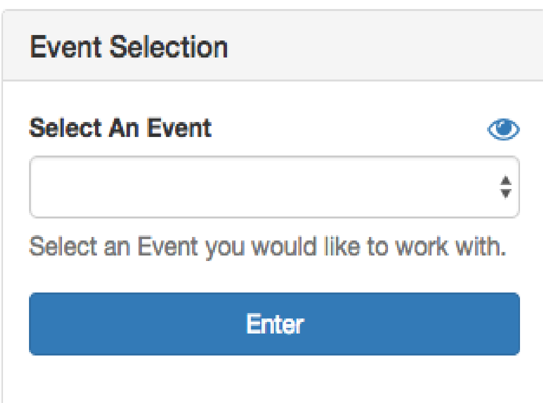
1. Go to the [Onsite Inventory].

2. Enter your provided credentials and click *Log In.*



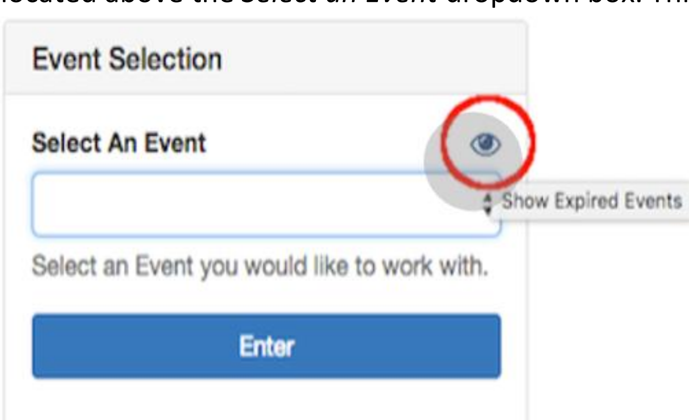
II. Event Selection

If there are multiple events tied to your account you will have to select which event you would like to access. If there is only one event tied to your account you will automatically be directed to the inventory.



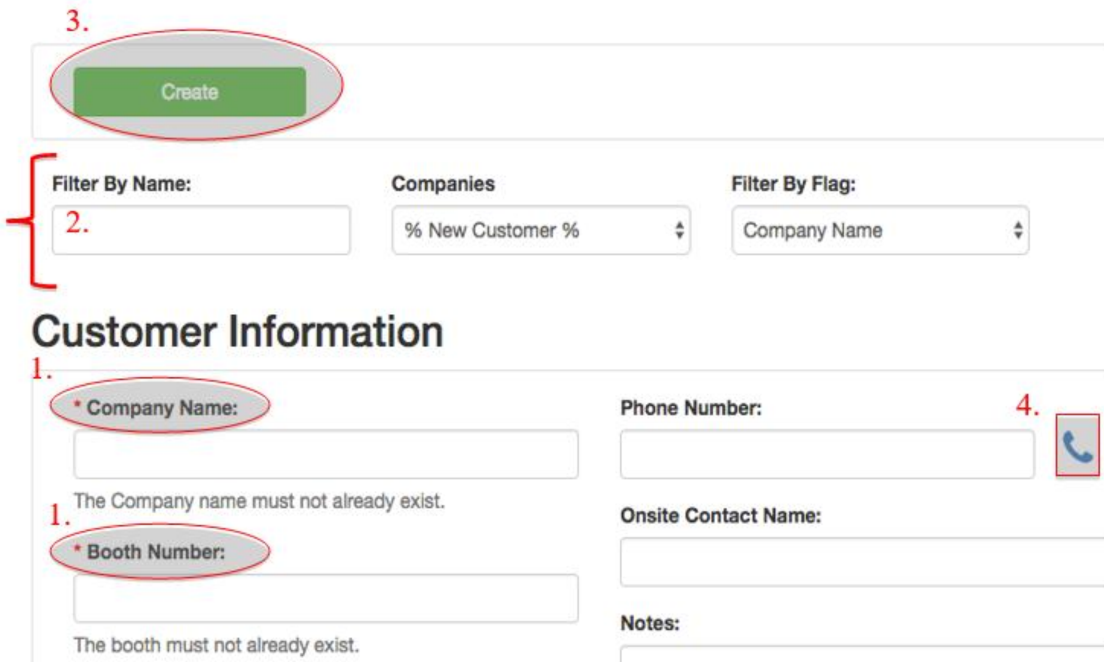
a. Hidden Event

When choosing an event, you might not see any available events for selection. If this is the case, the event you are searching for is most likely an expired show. To find your expired show, simply select the eyeball icon located above the *Select an Event* dropdown box. This will grant access to all expired events.



III. Customer Data Creation

a. Manual Entry



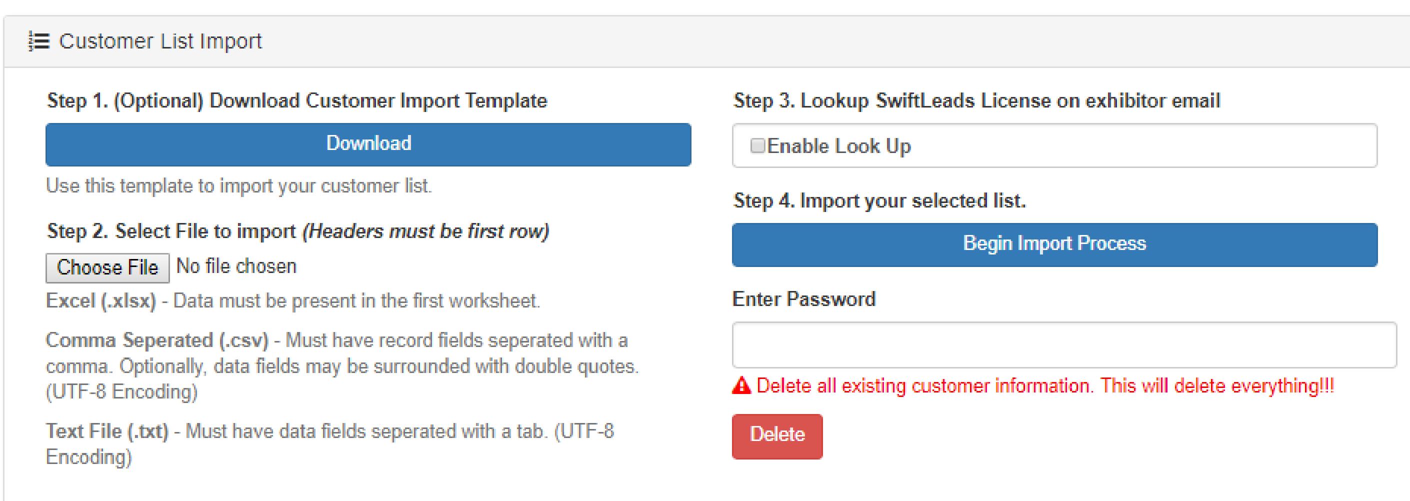
1. To create a new customer, you must fill in all relevant information in the *Customer Information* section. Mandatory textboxes will be marked with a (*). This indicates the text field must be filled in before moving forward. Important to note: both the Company Name and Booth Number must be unique.

2. This row is only relevant to existing customers. If creating a new customer is your goal, this row can be ignored for this step.

3. Click *Create* to create a new customer once you are satisfied with the entered information.

4. After you've created a new customer, the phone and text message icons will be available to contact customer at the click of the button.

b. Import From List



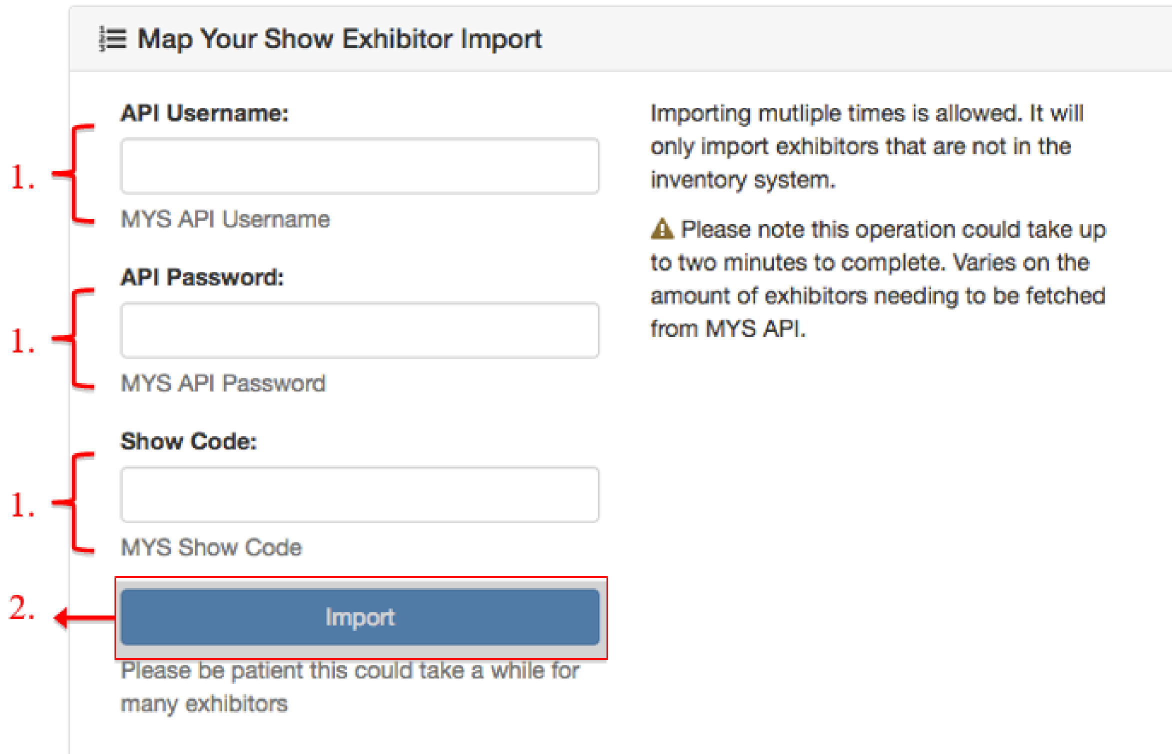
(Optional) 1. Select *Download* to download an Excel spreadsheet where you will log customers' information. Once you have entered the desired information, save the file to your computer.

2. Select *Choose File* and select the Excel file containing the correct customer data.

(Optional) 3. Tick the *Enable Look Up* box if you wish to enable the look up feature. This will automatically search for existing Licenses for customers using email address as a reference.

4. After you have uploaded the file properly, click *Begin Import Process* complete the process.

c. Import From MapYourShow



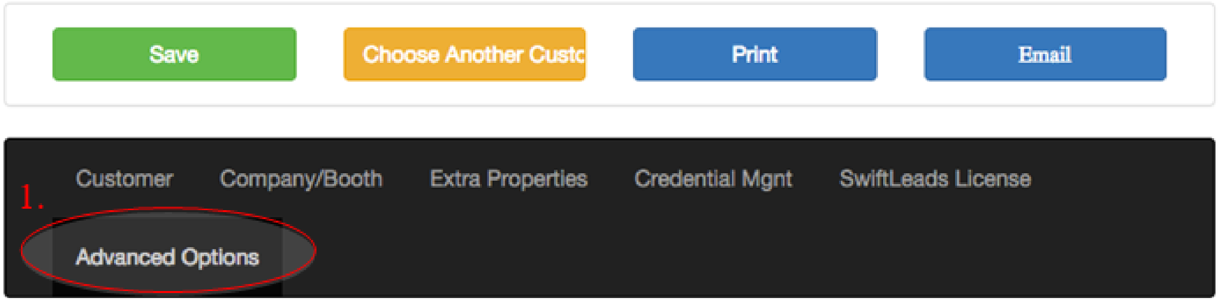
1. Enter your API credentials that were provided by MapYourShow (MYS) management.

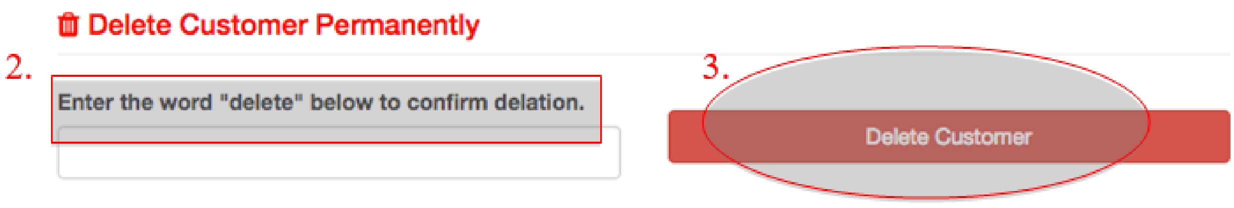
2. After you have entered the MYS API credentials, press the *Import* button to begin importing exhibitors from MapYourShow.

IV. Deleting Customers

a. Delete an Individual Customer

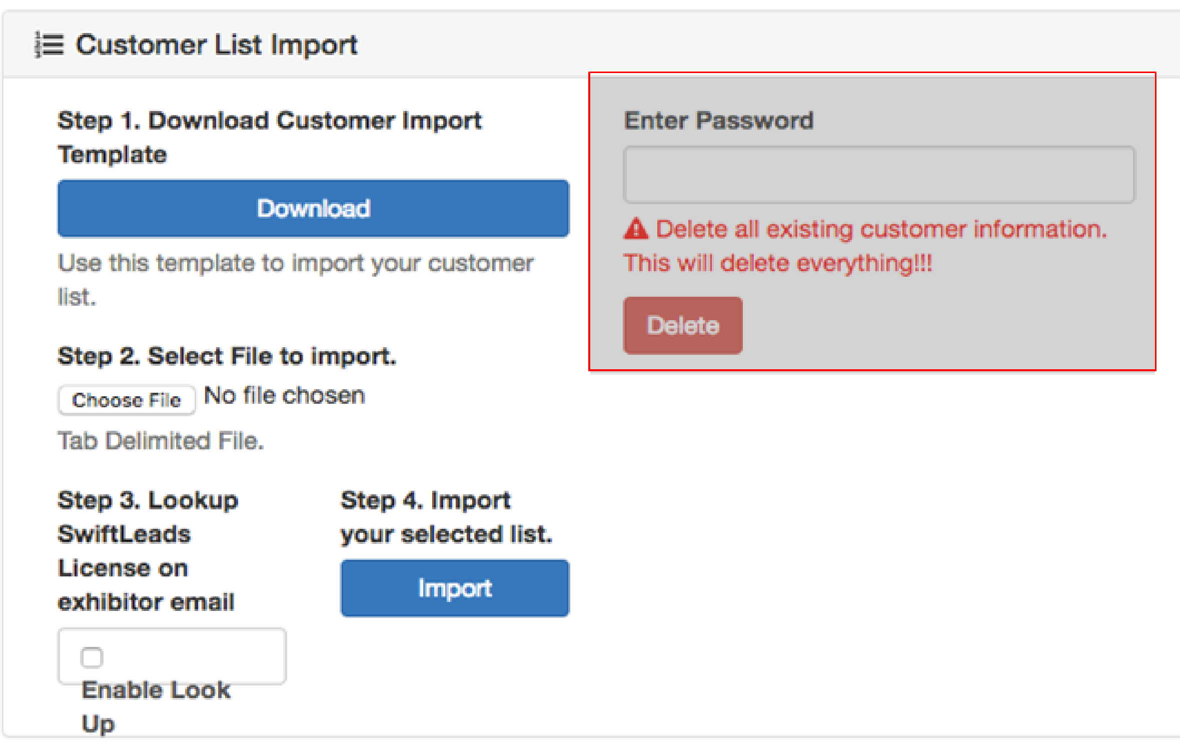
Select the *Checkout* tab on the site's sidebar and select the customer file you wish to delete.





1. Select *Advanced Options*.
2. To delete an individual customer, you must type the word "delete" into the provided textbox.
3. After you have typed in the word "delete," you can click the red *Delete Customer* button to delete the customer file.

b. Delete All Customers

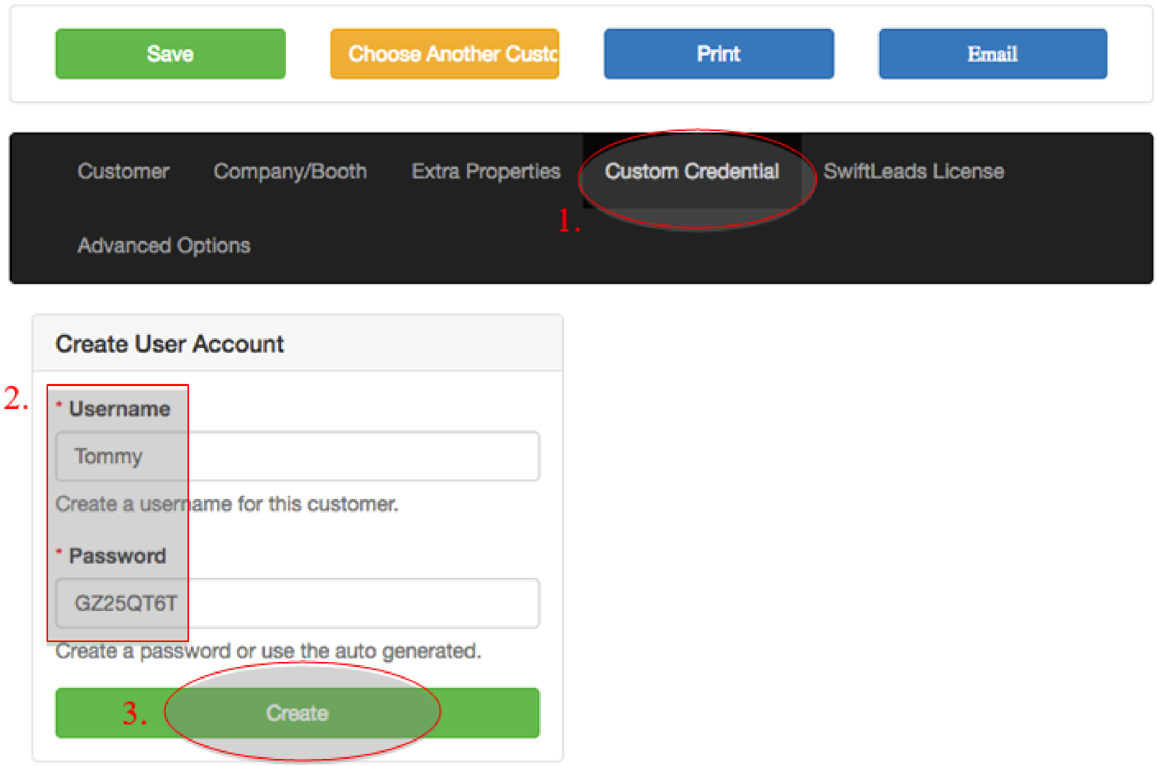


To delete all customers at once, you will need to find this panel in the Management tab on your sidebar. Once you have located the *Customer List Import* panel in your management tab, you will need to enter the password "delete" then press the red *Delete* button. All uploaded customer files will be deleted.

V. Creating a Custom Credential

Creating a custom credential is optional. This is a feature that allows for someone to create a username and password that can access all parts of their show.

To create your custom credential, select the *Checkout* tab on the site's sidebar, and then use the customer dropdown box to find and select the correct customer.



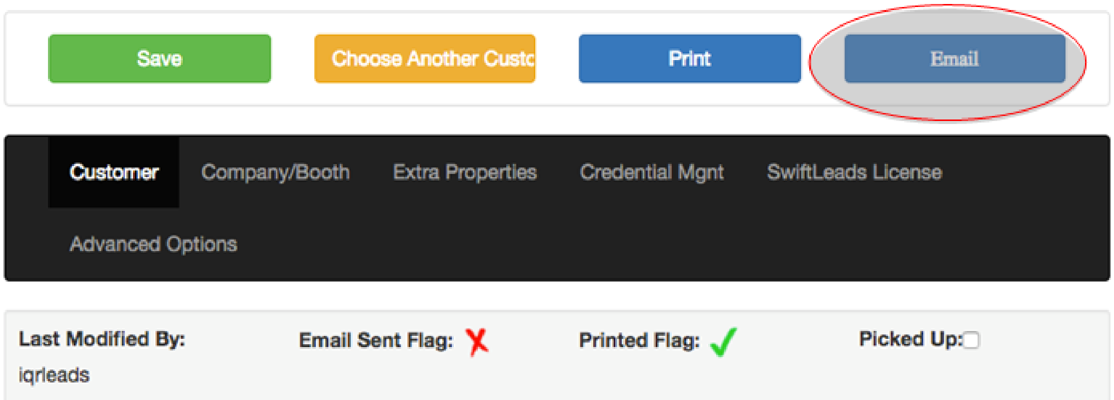
1. After selecting the customer you want to create a credential for, select the option *Custom Credential* on the tool bar above.

2. Next you will enter the username and password you want to represent the custom credential. One will be provided for you but you can customize to your preference.

3. After you are satisfied with the entered username and password, simply click the green *Create* button to complete the process.

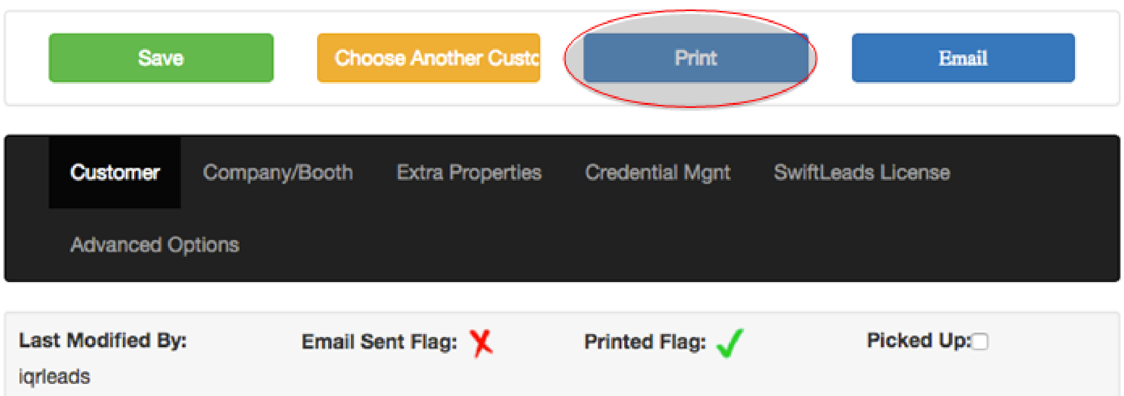
VI. Checking Out Devices

a. Emailing



When checking out equipment, at any time a receipt can be emailed to the user. To have a copy of the receipt emailed to you, simply select the *Email* button circled in red above.

b. Printing

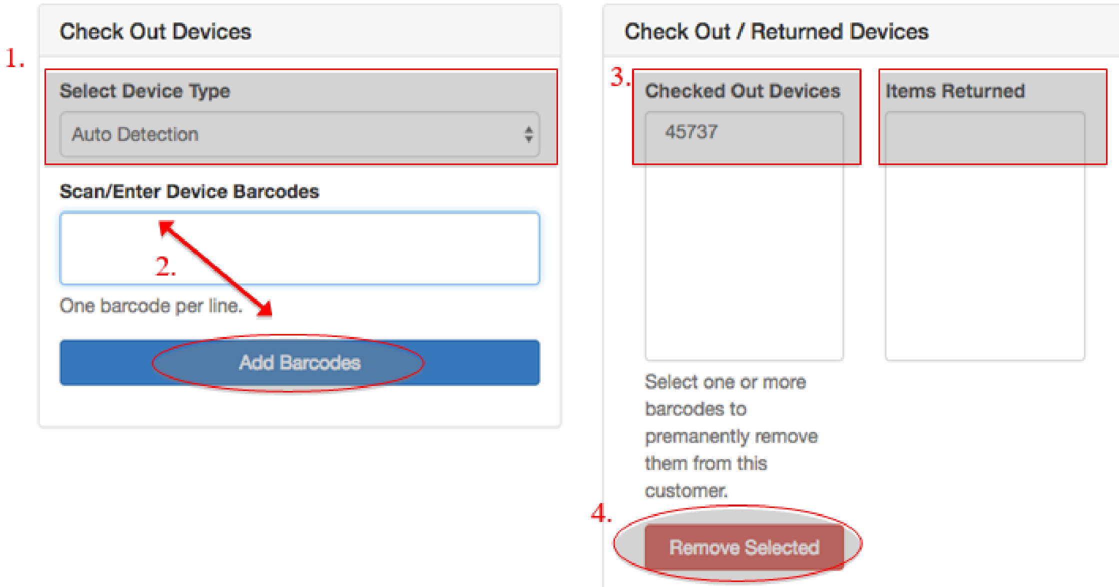


Another option for receiving a receipt during the check out process is to have a physical copy of the receipt printed out.

To have a copy of your receipt printed, simply select the *Print* button circled in red above.

After you click the *Print* button, you will see the following image. To continue, select the option "Always allow pop-ups from swiftium.co" and click *Done*.

c. Check Out Devices



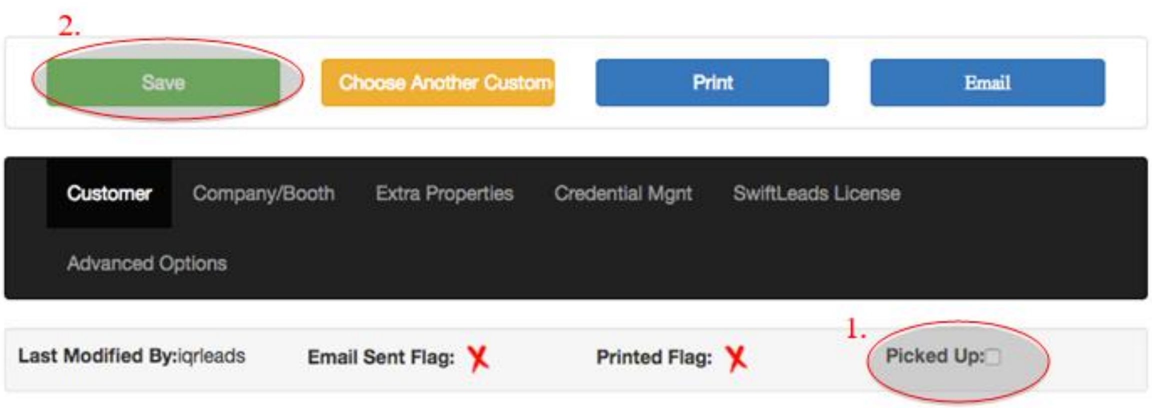
1. Use the *Select Device Type* box to select your device type. Using Auto Detection is recommended.

2. Scan or type device barcode and then click the *Add Barcodes* button below.

3. The columns on the right are where you will see the device codes for the items you have checked out and/or returned.

4. To remove a barcode from the list of devices checked out, simply select the barcode you want to remove and click *Remove Selected*.

d. Mark as Picked Up

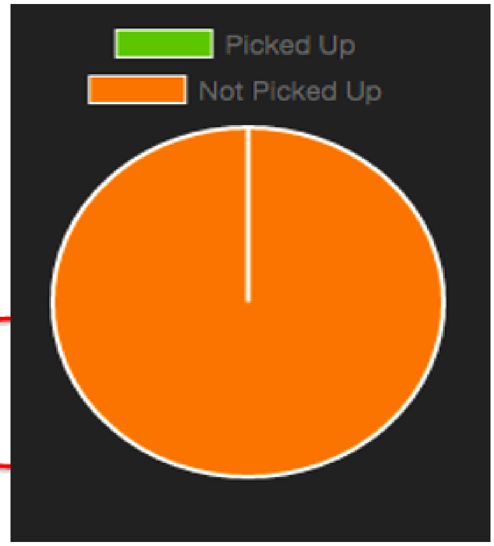


To mark a customer's order as picked up, select the *Checkout* tab on the site's sidebar and then choose the customer you need.

1. Check the box labeled *Picked Up:*

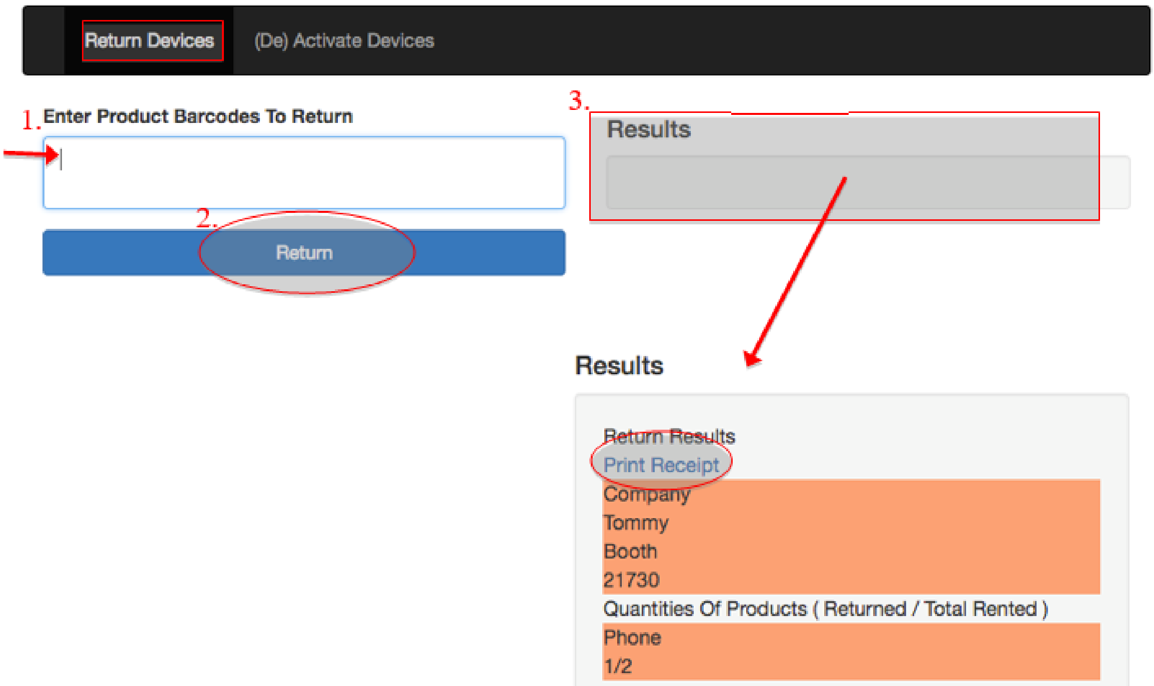
2. After you have filled in the check box, click *Save* to ensure the file updates.

*Feature on the site's sidebar showing ratio



VII. Returning Devices

a. Return Devices

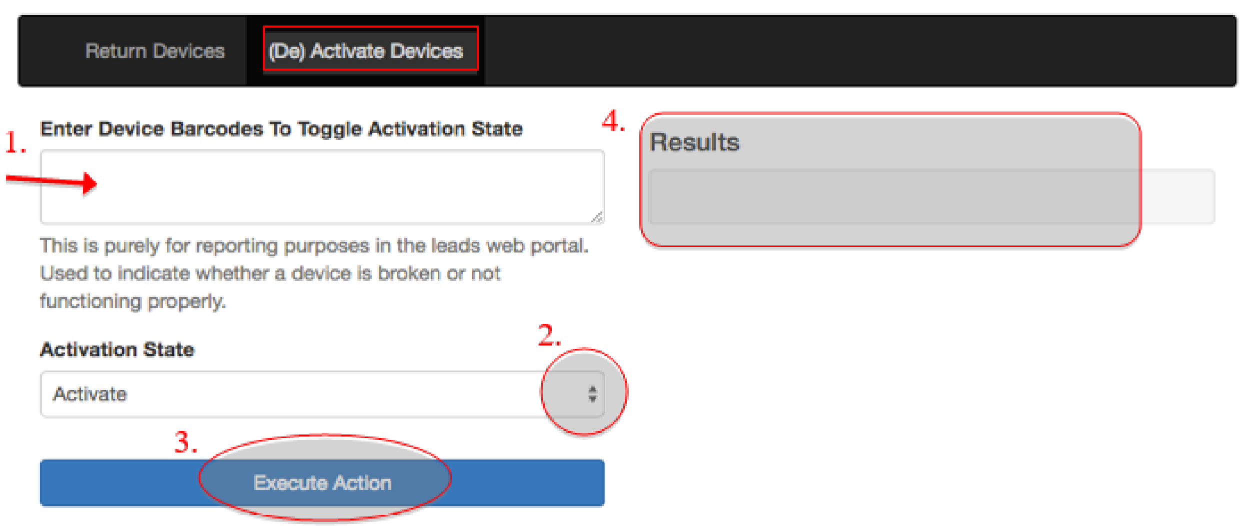


1. Click this text box so that your cursor appears, then scan the barcodes of the items you are retuning.

2. Once you have scanned your barcodes into the text box above, click *Return*.

3. The results box will display your receipt. If the receipt shows in green, all items in the order are accounted for. If the receipt shows in red, you are missing an item that completes the order. You can always print your receipt from the *Results* as well.

b. Activate/Deactivate Devices



During a show, if a device becomes unusable or lost, the device should be registered as deactivated. If at some point in that show the device is found or can be used again, you can also reactive the device here.

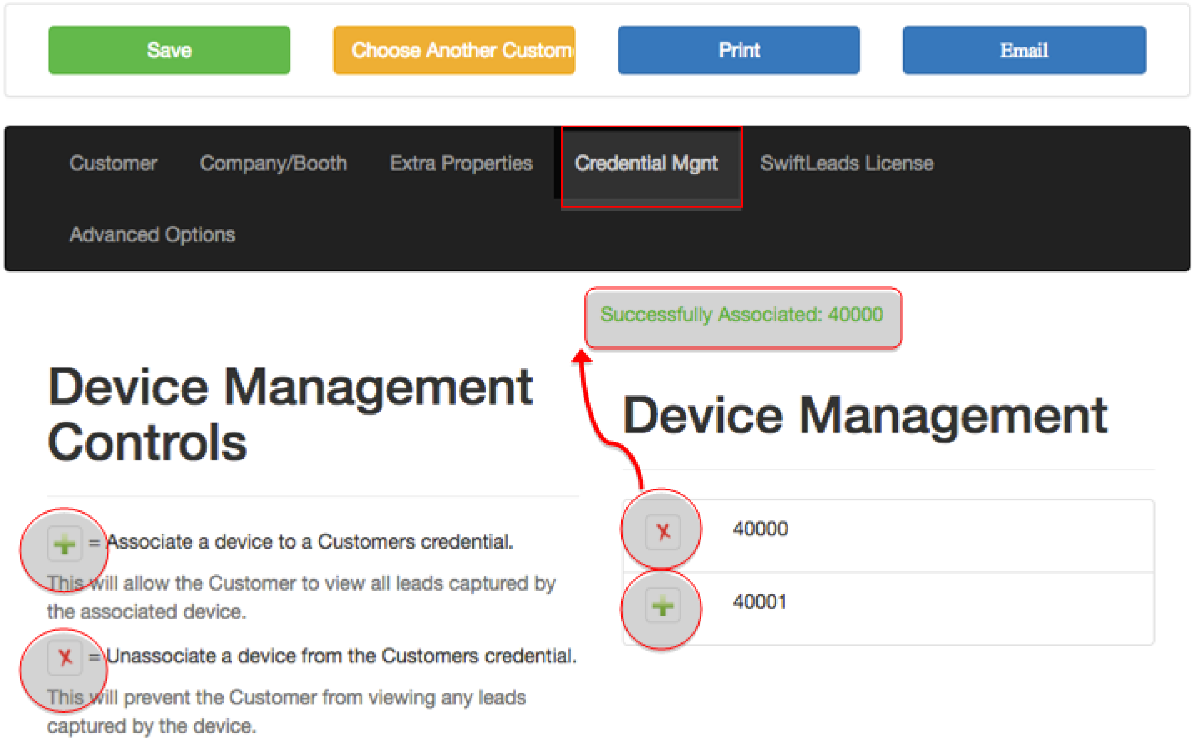
1. Enter the barcode of the device you need to (de)activate

2. Select the action you wish to execute by clicking the dropdown arrow. You should see the options *Activate* and *Deactivate*.

3. Once you are satisfied with the selected action, click *Execute Action*.

4. Upon execution of the action, the Results box will display a confirmation message. This message will state whether the action was successfully performed.

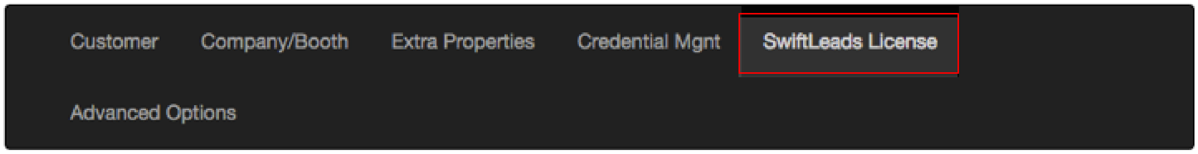
VIII. Credential Device Management

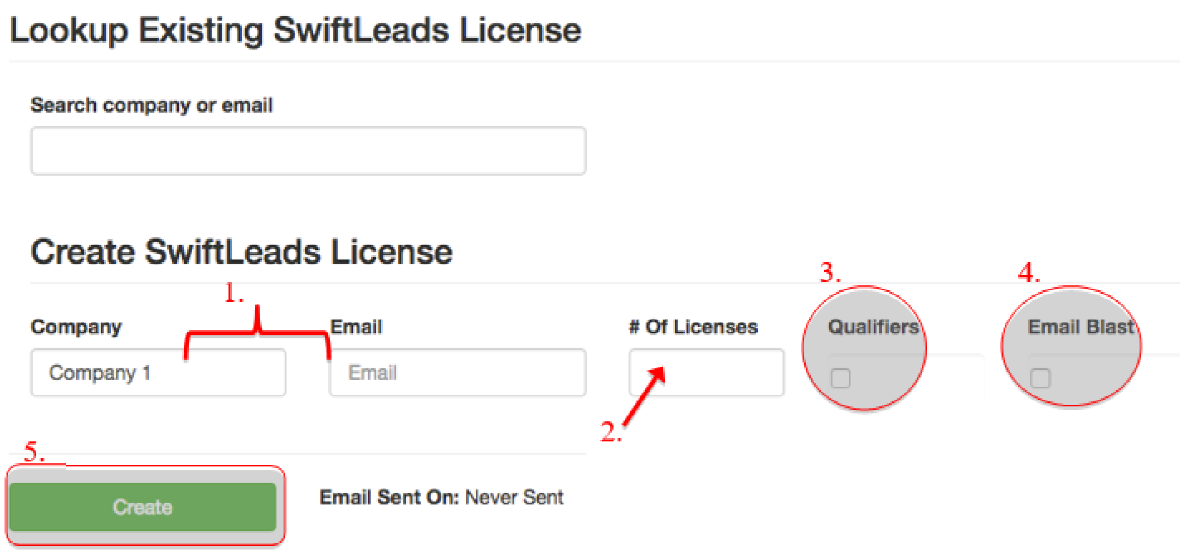


To manage your credentials, click on the *Credential Management* tab. Once inside you will notice your devices listed under *Device Management* on the right of the page. To associate a device to a credential, simply click the green + next to the device number. You will notice a confirmation message above in green. To unassociate the device from the assigned credential, click the red X that has taken the place of the green +.

IX. Swift Licenses

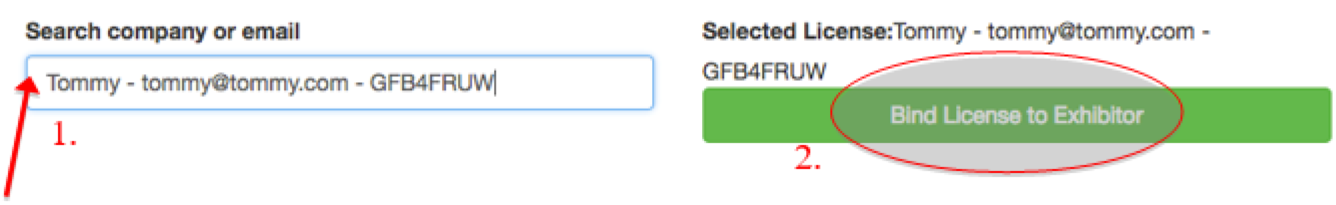
a. Creation





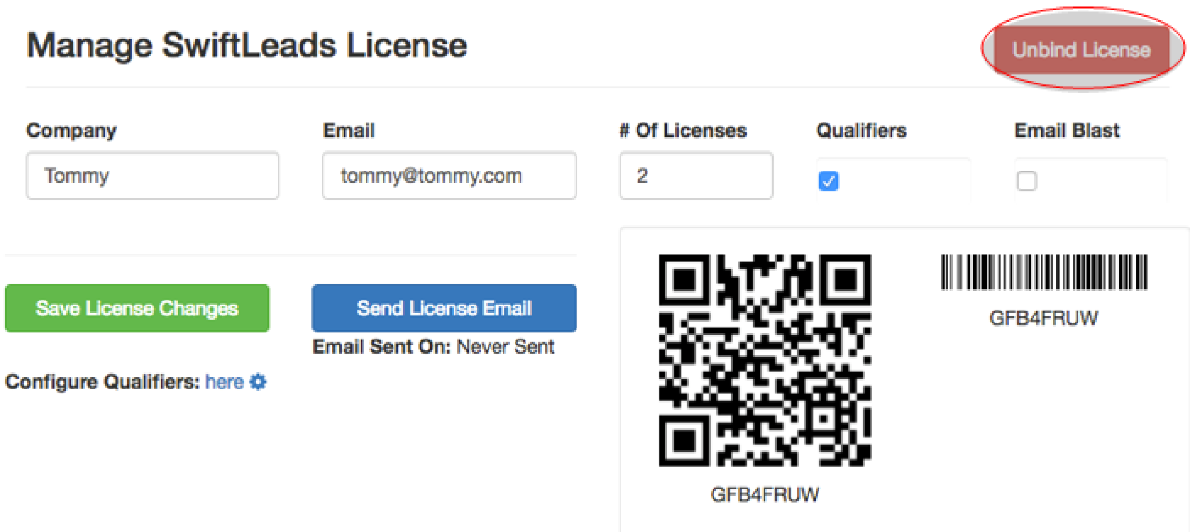
1. Enter the name and email of the company you want to create a license for.
2. Enter the number of licenses you want to create. Note: the number of Licenses should be equal to the number of devices in your order.
3. Select the *Qualifiers* box if you want to include the custom qualifiers (previously created) with the license.
4. Select the *Email Blast* box if you want to include an *Email Blast* with the license. This allows the exhibitor to automatically send an email to potential customers as their badges are scanned.
5. After all the information is filled in click the green *Create* button to finish creating the license.

b. Binding



1. To bind a License to an exhibitor, start by entering the company name or email in the textbox. You should see the company appear if the customer was properly created already. Nothing will appear if the customer file has yet to be created.
2. After finding the company in the search box click the green button, *Bind License to Exhibitor*, to complete the process.

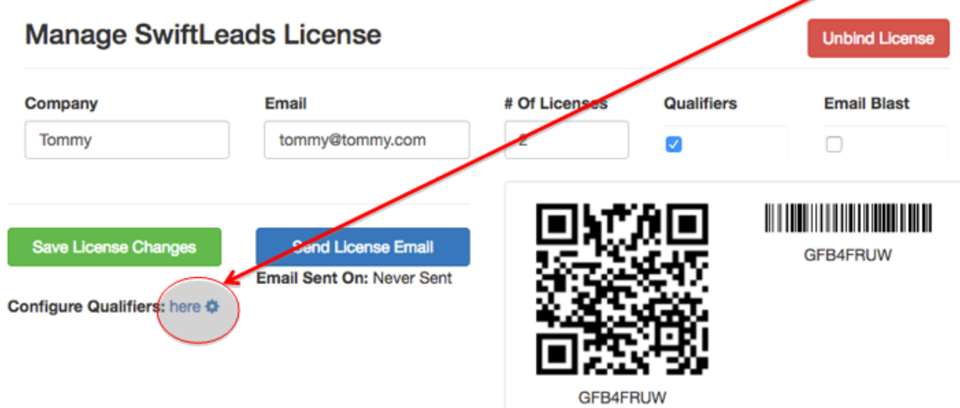
c. Unbinding



To unbind a license, simply click the red *Unbind License* button located in the top right corner of the Manage SwiftLeads License page.

d. Qualifiers

To configure your custom qualifiers, you can click the link labeled *here*, located under the *Save License Changes* button.



After you click the link above, you will be redirected to a new page where you can add and/or modify qualifiers.