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# Onsite Inventory System Manual

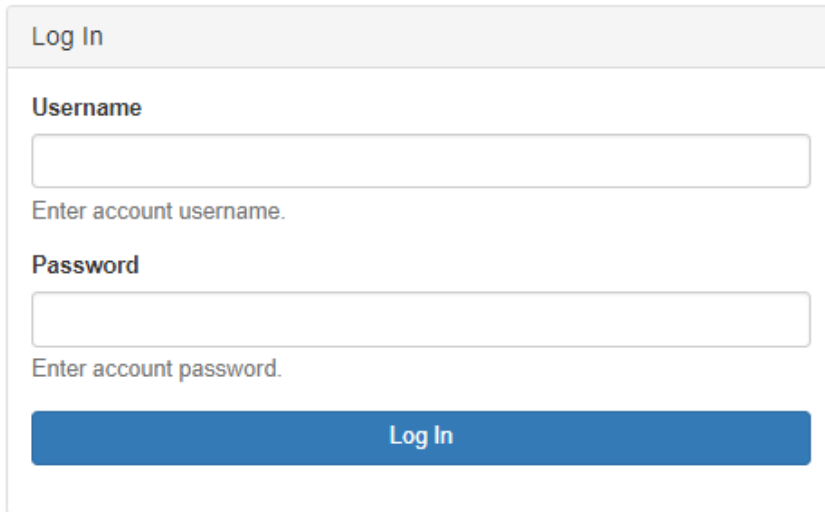
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## I. Logging In

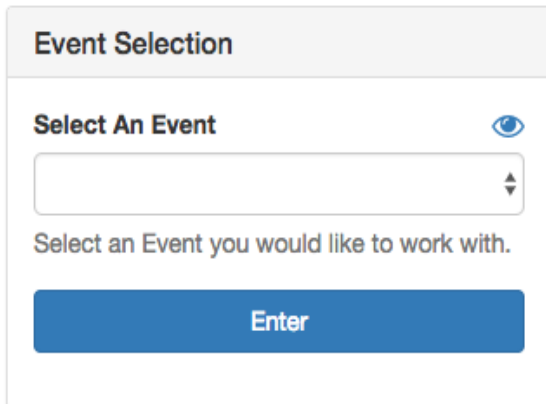
1. Go to the [Onsite Inventory](#).
2. Enter your provided credentials and click *Log In*.



The screenshot shows a 'Log In' form with a light gray header. Below the header, there are two input fields. The first is labeled 'Username' and has a placeholder text 'Enter account username.' The second is labeled 'Password' and has a placeholder text 'Enter account password.' At the bottom of the form is a blue button labeled 'Log In'.

## II. Event Selection

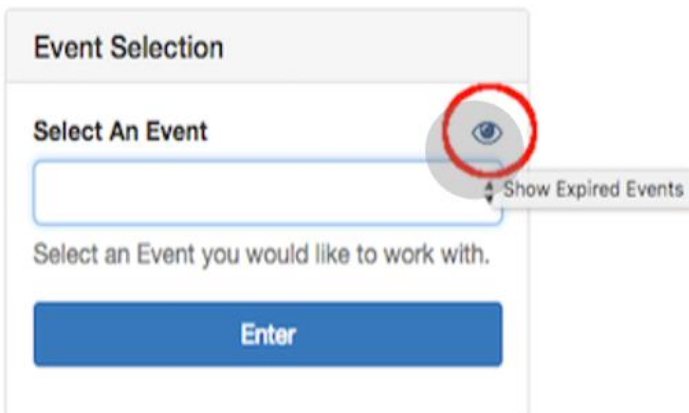
If there are multiple events tied to your account you will have to select which event you would like to access. If there is only one event tied to your account you will automatically be directed to the inventory.



The screenshot shows an 'Event Selection' form with a light gray header. Below the header, there is a dropdown menu labeled 'Select An Event' with an eye icon to its right. Below the dropdown is a placeholder text 'Select an Event you would like to work with.' At the bottom of the form is a blue button labeled 'Enter'.

### 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.



This screenshot is similar to the previous one, but it highlights the eye icon above the 'Select An Event' dropdown with a red circle. A tooltip with the text 'Show Expired Events' and a downward arrow is positioned below the eye icon.

### III. Customer Data Creation

#### a. Manual Entry

3. **Create**

Filter By Name:  Companies: % New Customer % Filter By Flag: Company Name

### Customer Information

1. \* **Company Name:**  Phone Number:  4.

1. The Company name must not already exist.

1. \* **Booth Number:**  Onsite Contact Name:

The booth must not already exist.

Notes:

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

Customer List Import

Step 1. (Optional) Download Customer Import Template  
**Download**  
Use this template to import your customer list.

Step 2. Select File to import (*Headers must be first row*)  
**Choose File** No file chosen  
Excel (.xlsx) - Data must be present in the first worksheet.  
Comma Separated (.csv) - Must have record fields separated with a comma. Optionally, data fields may be surrounded with double quotes. (UTF-8 Encoding)  
Text File (.txt) - Must have data fields separated with a tab. (UTF-8 Encoding)

Step 3. Lookup SwiftLeads License on exhibitor email  
 Enable Look Up

Step 4. Import your selected list.  
**Begin Import Process**

Enter Password

**⚠ Delete all existing customer information. This will delete everything!!!**  
**Delete**

(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

**API Username:**  
MYS API Username

**API Password:**  
MYS API Password

**Show Code:**  
MYS Show Code

**Import**

Please be patient this could take a while for many exhibitors

Importing mutiple times is allowed. It will only import exhibitors that are not in the inventory system.

⚠ Please note this operation could take up to two minutes to complete. Varies on the amount of exhibitors needing to be fetched from MYS API.

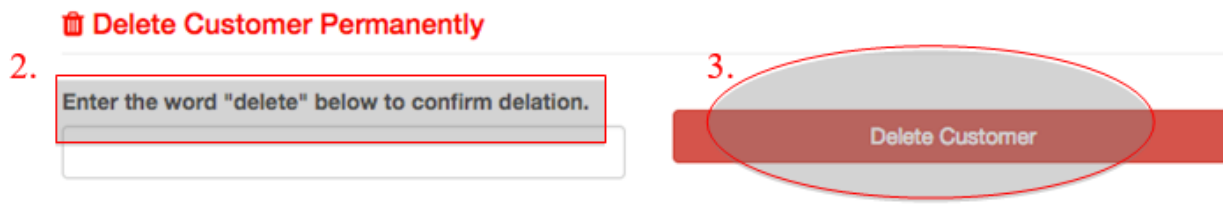
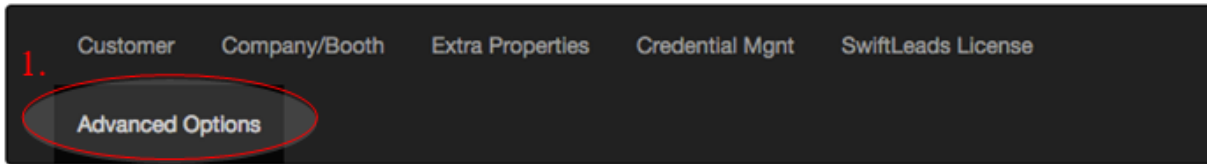
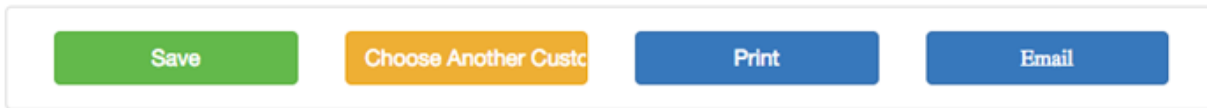
1. Enter your API credentials that were provided by MapYourShow (MYS) management.

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

## IV. Deleting Customers

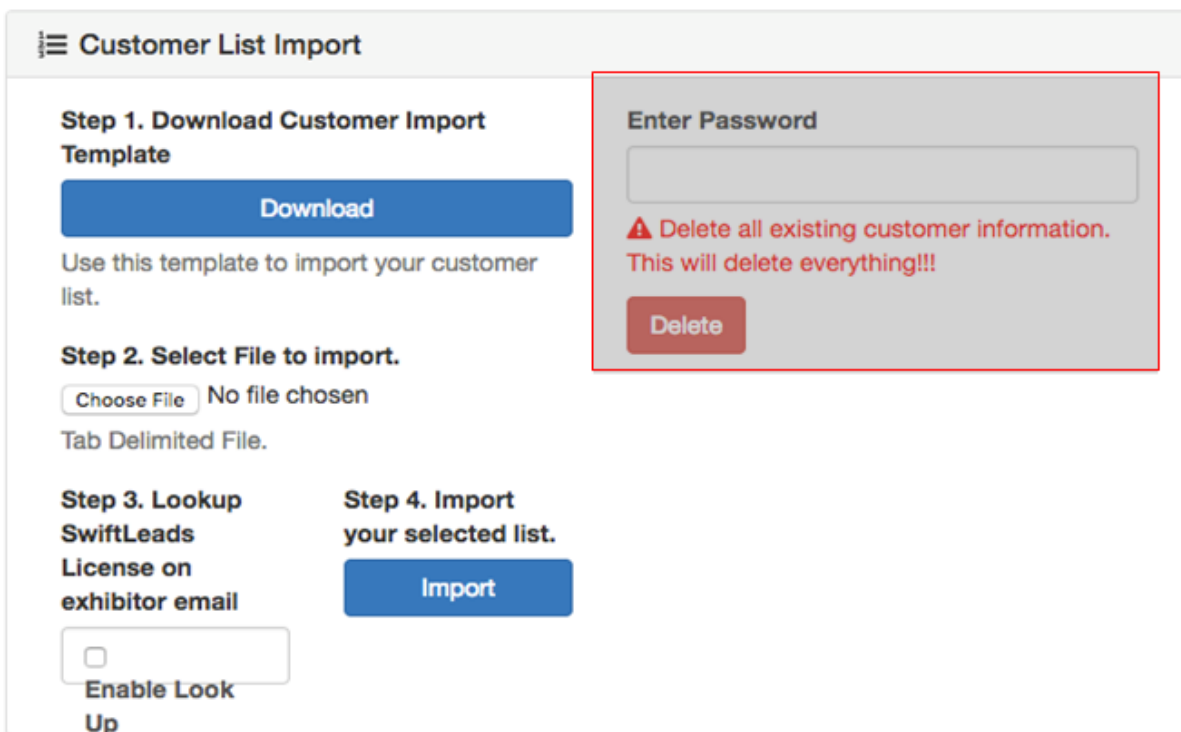
### a. Delete an Individual Customer

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

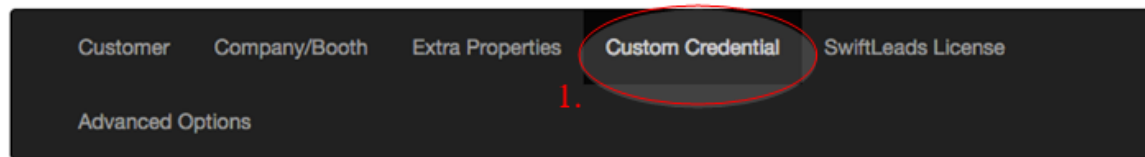
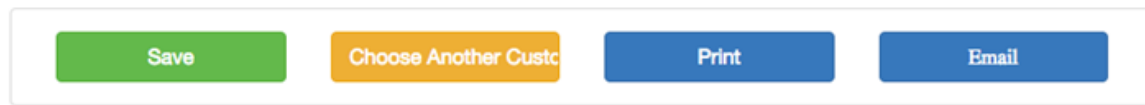


To delete all customers at once, you will need to find this panel in the Management tab on your sidebar. Once you have located the *Customer List Import* panel in your management tab, you will need to enter the password "delete" then press the red *Delete* button. All uploaded customer files will be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

A 'Create User Account' form. It has two input fields: 'Username' with the value 'Tommy' and 'Password' with the value 'GZ25QT6T'. Below the password field is the text 'Create a password or use the auto generated.' At the bottom is a green 'Create' button, which is circled in red and labeled with a red '3.'. The form is also labeled with a red '2.' on the left side.

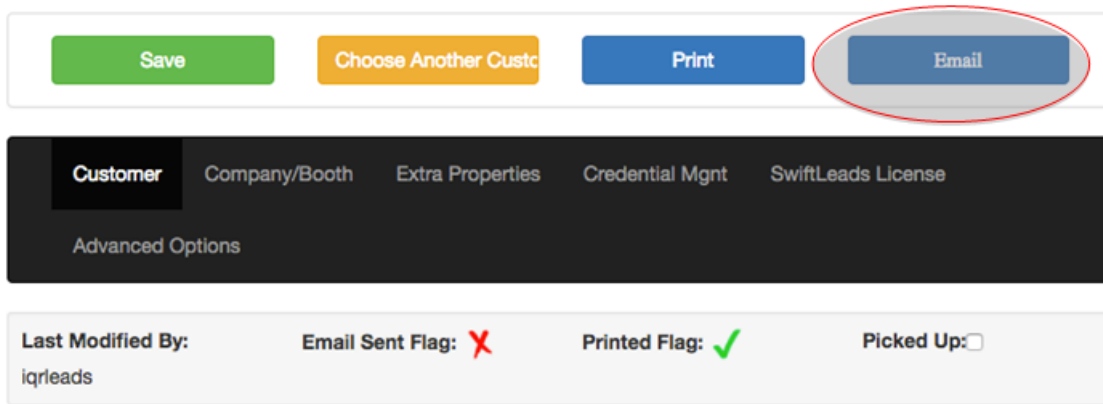
1. After selecting the customer you want to create a credential for, select the option *Custom Credential* on the tool bar above.

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.

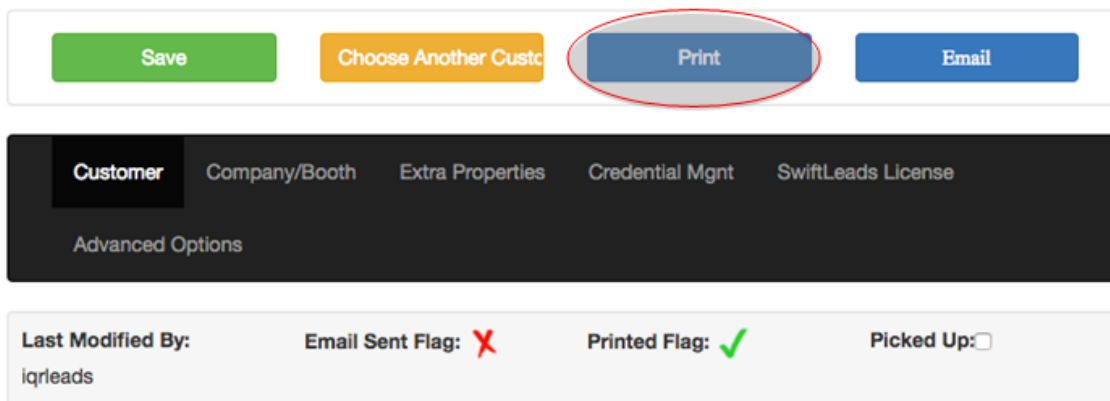
## VI. Checking Out Devices

### 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. Select Device Type  
Auto Detection

2. Scan/Enter Device Barcodes  
One barcode per line.  
Add Barcodes

3. Checked Out Devices  
45737  
Items Returned

4. Remove Selected

Select one or more barcodes to permanently remove them from this customer.

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

'. The 'Picked Up' checkbox is circled in red with a '1.' annotation."/>

2. Save Choose Another Custom Print Email

Customer Company/Booth Extra Properties Credential Mgmt SwiftLeads License

Advanced Options

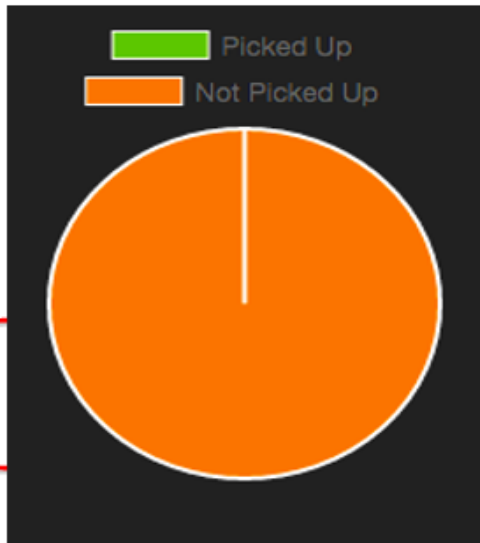
Last Modified By: iqrleads Email Sent Flag: X Printed Flag: X 1. Picked Up:

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

The screenshot shows a dark header bar with two tabs: 'Return Devices' (highlighted with a red box) and '(De) Activate Devices'. Below the header, there are three numbered steps:

- 1. Enter Product Barcodes To Return**: A red arrow points to a text input field.
- 2. Return**: A red oval highlights a blue button labeled 'Return'.
- 3. Results**: A red arrow points to a grey box labeled 'Results'.

Below the 'Results' box, a detailed view of the results is shown:

**Results**

Return Results  
[Print Receipt](#)  
Company  
Tommy  
Booth  
21730  
Quantities Of Products ( Returned / Total Rented )  
Phone  
1/2

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

The screenshot shows a dark header bar with two tabs: 'Return Devices' and '(De) Activate Devices' (highlighted with a red box). Below the header, there are four numbered steps:

- 1. Enter Device Barcodes To Toggle Activation State**: A red arrow points to a text input field.
- 2. Activation State**: A red oval highlights a dropdown menu currently set to 'Activate'.
- 3. Execute Action**: A red oval highlights a blue button labeled 'Execute Action'.
- 4. Results**: A red oval highlights a grey box labeled 'Results'.

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

SaveChoose Another CustomPrintEmail

CustomerCompany/BoothExtra PropertiesCredential MgmtSwiftLeads License

Advanced Options

Successfully Associated: 40000

### Device Management Controls

- + = Associate a device to a Customers credential.  
This will allow the Customer to view all leads captured by the associated device.
- X = Unassociate a device from the Customers credential.  
This will prevent the Customer from viewing any leads captured by the device.

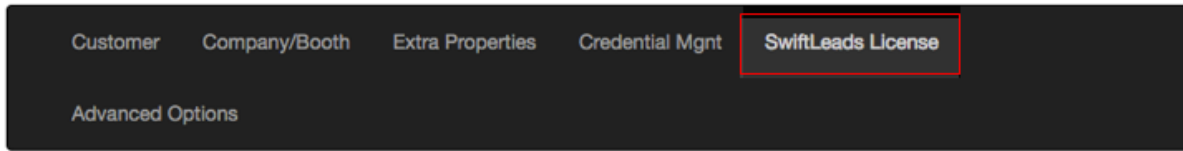
### Device Management

<span style="border: 1px solid red; border-radius: 50%; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; line-height: 20px;">X</span>	40000
<span style="border: 1px solid red; border-radius: 50%; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; line-height: 20px;">+</span>	40001

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



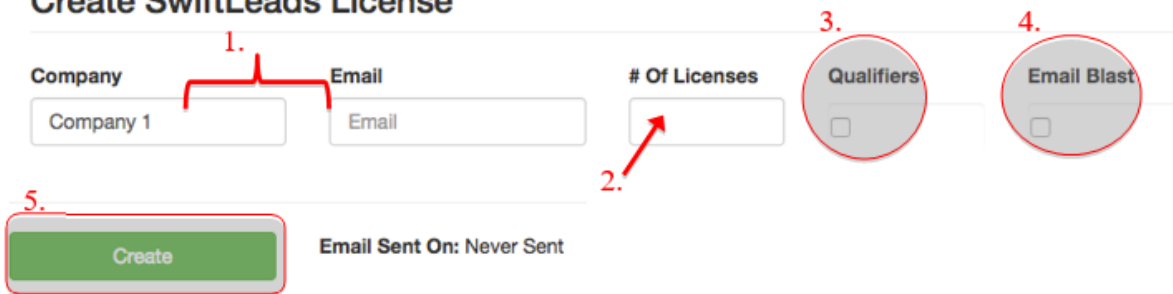
### Lookup Existing SwiftLeads License

Search company or email

### Create SwiftLeads License

Company  Email  # Of Licenses   Qualifiers  Email Blast

5.  Email Sent On: Never Sent



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

Search company or email

1.

Selected License: Tommy - tommy@tommy.com - GFB4FRUW

2.



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

The screenshot shows the 'Manage SwiftLeads License' interface. At the top right, there is a red button labeled 'Unbind License' which is circled in red. Below the title, there are five input fields: 'Company' (Tommy), 'Email' (tommy@tommy.com), '# Of Licenses' (2), 'Qualifiers' (checked), and 'Email Blast' (unchecked). Below these fields are two buttons: a green 'Save License Changes' button and a blue 'Send License Email' button. Under the 'Send License Email' button, it says 'Email Sent On: Never Sent'. To the left of the QR code area, there is a link 'Configure Qualifiers: here' with a gear icon. On the right, there is a QR code and a barcode, both labeled 'GFB4FRUW'.

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.

This screenshot is identical to the one above, but with a red circle around the 'Configure Qualifiers: here' link and a red arrow pointing from the text in the previous section to this link. The 'Unbind License' button is also visible at the top right.

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