Onsite Inventory Sub Accounts

Create an unlimited number of accounts for members of your company, giving them access to onsite inventory events you assign to their accounts.

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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 Account Management

Creating new Sub Account

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

   Create New Account ➕

2. A user entry form will appear. Enter a unique username to the system and a secure password. Select the *Access* level you want this user to have.

   Username

   Password

   Access

   Advanced User ▾

   Create

   Access Levels
   - Basic
     o Check out equipment to customer
     o Create customers one at a time
     o Send one SMS
     o Send Email
     o Print receipt
     o Delete customers one at a time
     o Create Swiftium log in credential
     o Create SwiftLeads license
   - Advanced – User has access to the management page in the onsite inventory. Includes all privileges from the *Basic* access level as well as the following:

- o Bulk Customer management
- o Run reports
- o Device Details bulk management
- o MapYourShow Integration
- o SMS bulk send
- o Email bulk send

3. Press the *Create* button when all information has been entered into the form. A new record will appear in list of sub accounts.

Modifying an Existing Sub Account

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

2. This will open a user entry form similar to the one used to create a new user; however, the button will indicate *Save Changes* rather than *Create*.

Deleting Sub Account

1. From the list of sub accounts, click the red **X** icon on the sub accounts record.

2. The entry form with the sub accounts information will appear. Confirm that the information in the form is the sub account to be deleted.

3. Press the *Delete Account* button.

4. A message at the top of the page will appear indicating the result of the action. A successfully deleted account will display the message *Account Deleted Successfully*.

Associating Sub Account to Event

1. From the OSI management page select the *Events* Tab.
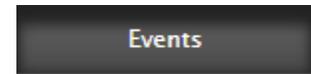
2. Find the event list record you would like to associate a sub account to. Click the black square icon to open the sub account.

3. Navigate to the *Accounts* Tab.

4. There will be two groups of accounts indicating which accounts have access to the selected event. *Linked accounts* have access and *Unlinked Accounts* do not have access.

Linked Accounts	Unlinked Accounts
swiftdev	temp12
	Pat TEST
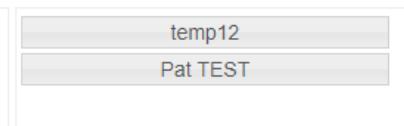
5. Simply dragging a sub account from the *unlinked accounts* box to the *linked accounts* box will give the sub account access to the selected event. Doing the opposite will result in the sub account losing access to the selected event.

6. Once all sub accounts have been moved into their desired group, press the *Save* button at the top of the page to save changes to the portal.