## **Onsite Inventory Manage Customer Information**

- 1. Go to www.swiftium.co
- 2. Select **Onsite Inventory** from the navigation menu at the top.
- 3. Enter account credentials and press Log in.
- 4. Select the show in question and click enter.

Dashboard		
Check Out		
Lul Returning	Event Selection	
III Management	Select An Event	٥
		,
	Select an Event you would like to work with.	
	Enter	

- 5. Select the **Management Tab** from the sidebar navigation.
  - (Optional) Delete existing customer information by typing "delete" in the password bank and then clicking delete

-Upon success, "deleted" will appear at the top of the screen

E Customer List Import					
Step 1. Download Customer I	mport Template	Enter Password			
Dow	nload	delete			
Jse this template to import your	customer list.	A Delete all existing customer information. This will delete			
Step 2. Select File to import.		everything!!!			
Choose File No file chosen		Delete			
Tab Delimited File.					
Step 3. Lookup SwiftLeads	Step 4. Import your				
License on exhibitor email	selected list.				
Enable Look Up	Import				

 Optionally, a template with all the available Onsite Inventory fields can be downloaded. Customer information can be input into this template and reuploaded to the system.

j≣ Cus	tomer	List	Import
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Step 1. Download Customer Import Template

Download

Use this template to import your customer list.

Any products/services associated with the Event should only have numeric values in their

column - i.e. Scanner, license, qualifier – if you want to indicate yes or no use "1" for yes or a "0" for no

- 8. Once all data has been entered correctly, save the template as one of the following formats: Excel (.XLSX), Unicode Text (.TXT) or CSV UTF-8 (.CSV)
- 9. Then select choose file, choosing the file you just saved and click **Begin Import**.
- 10. This will redirect the page to an import wizard. This wizard requires matching the available Onsite Inventory fields to the uploaded files fields. Simply match an inventory field to one of the fields in the imported file fields using the dropdown.
- 11. Once finished mapping the fields, press **Import Records**
- 12. Await a green notification with the message **Good to Go** to display. Indicating everything was imported successfully.

Inventory Field	Imported File Fields
Company	Company
Booth	Booth
Confirmation_ID	Confirmation_ID
Email	Email
Phone	Phone
Name	Name
Notes	Notes
Qualifier_Code	Qualifier_Code
Scanner - 73  Import Records  Cancel Import	Scanner - 73 Empty Company Booth
	Continuation_UD Email Phone Name Value Second Value Va

Map Imported File Columns To Inventory Fields