Onsite Inventory Receipt Template (Account Default)

Create an account default WYSIWYG receipt template that can be referenced by Events without having to recreate the same template multiple times.
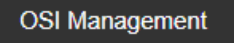
Summary: The Onsite Inventory has the option to print a receipt for a customer. This receipt could also contain information on how to access leads or other forms of instructions.

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Log 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 Defaults.*

5. The panel labeled *Receipt Template* is where all changes can be made.

Creating/Modifying Receipt Template

Optionally, the system default template may be used as a starting point. Pressing the System Default button will set the editor panel to the system default template, allowing for any modifications to be made.

The editor panel is a friendly HTML editor. Optionally, clicking the *Source* button in the editor ribbon will display the raw HTML code, allowing a template that was created from an outside source to be simply copied and pasted into the Swiftium editor.

Text placeholders can be used anywhere in the editor. The placeholder will be substituted with customer and event information. A list of placeholders can be found to the right of the editor. All text place holders must be surrounded with curly brackets.

Fall Back Method

An event can have up to three templates to choose from. Specificity is used to determine which template to use. The event will check the list below starting at position 1 for an available template.

1. Event Template (Optional)
2. Account Default Template (Optional)
3. System Default Template (Always available)

Revert to System Default Template

The onsite inventory will fall back to the system default template if there is no account template found. Deleting the account default template will trigger events to use the next available template.

Deleting the Account Default Receipt Template

Pressing the Delete Template button will delete the Account Default Template. Deleting the account template may affect events that are using the fall back method, forcing all events without an event template to use the system template.

Uses in the Onsite Inventory

- **Print from Customer Profile** – The print button when viewing a customer profile can be used to print a receipt. This print option can be used at any time with no restrictions.

- **Print missing inventory Receipt –** During the return process it is optional to print a receipt for a customer. The print receipt button only become available when partial inventory has been returned.