# SWIFT SUBMITTALS QUICK TIPS AND COMMON ERRORS

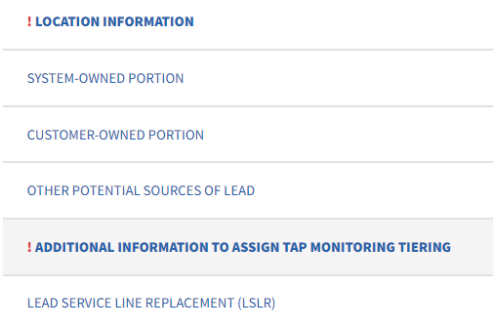
Filling out the Template:

- Spell out words whenever possible
    - Replace “E” with “East”, “N.” with “North”, etc. Replace “Blvd” with “Boulevard”, and “Rd.” with “Road”, etc.
- To find and replace abbreviated words in a file with many Service Line entries:
    - “Ctrl +F”, then select the “Replace” tab, or select the “Find and Replace” button towards the top of the page in the Excel “Home” tab.
    - Enter in the update (Replace Ct with Court) and “Replace All.” This will allow the user to replace abbreviations in an efficient manner which can drastically reduce location errors.
- Avoid including Apt #’s, Suites, and other information typically listed on a second address line. If the full address is listed first including city/zip before listing the Apartment # or similar, the address mapping tool may be able to process it better. This information is better suited for the “Other Location Identifier” column.
- Special characters @ and “” are not allowed. If address is a cross-street use & between the 2 streets in the “Street Name” column.
- Use the “Notes” column for location information longer than 40 characters.
- Make sure service line IDs are not too long – 50 characters is the max.
- For fields with drop-down values, make sure you are populating those cells with exact values from the dropdown list. Even minor differences (like a hyphen (-) vs. dash (–)) can cause errors. Do not copy and paste over a dropdown list column.

Reviewing or Entering Online:

After Uploading the Excel File, click “Review” under Actions on the line with the uploaded file or if entering service lines individually using the “Add New Service Line” on the left side menu or button on the “Update Service Line(s)” page:

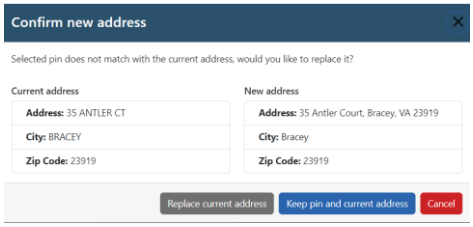
- To open a section in the online form, click on the title box for the section and it will open.
- If there are service lines with an “Invalid” status on the table, they need to be corrected before the data can be imported. Once all service lines are “Valid” the inventory is ready to be imported.
- When editing a service line, the missing fields section titles will be bold and there will be a red exclamation point next to the section name. If all errors are not fixed an error message will appear after clicking "Save" button.

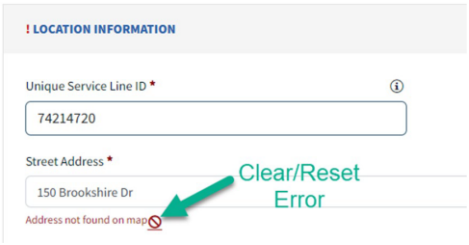



- Hovering over any ⓘ symbol will provide more information about that field.
- For the Location field, it is important for the user to enter a mappable location.

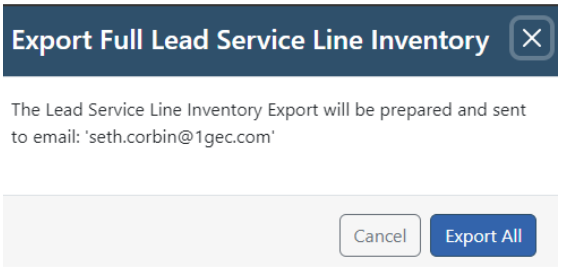
- To use the location entry box, type in the address and as it is being typed, suggestions will appear, click the one that matches the address being typed in. (Once one has been selected, the map will update with a pin to indicate the address and will use the coordinates that correspond to it)

- If there is no match for the address entered, use the typed address and drop the pin on the map where the address is located. Another method is to type in a similar address that is close to the original and change the pinpoint to the correct location before finalizing the true address. There may be a pop-up that suggests a possible new address, choose new address or keep pin, clear the error and click Save.




- Address Not Found/Address Uncertain/Address Not Validated Error: These warnings indicate that the mapping service made an educated guess about the location but couldn't confirm it exactly. These warnings do not need to be resolved to proceed with the import.

Viewing and Downloading the Imported Inventory

1. Click on the "Update Service Line(s)" option in the menu
2. Select a system from the dropdown at the top
3. Scroll to the bottom of the page - all inventory will be displayed for the selected system
4. Click the "Export Full Lead Service Line Inventory" button to initiate an email with all information
5. A pop-up will appear - click the "Export All" button to get a copy sent to your email address.