



TRELLIS CHECK-IN TOOL BEST PRACTICES

BEFORE THE EVENT

- **Send reminder emails to assign tickets** using the Trellis [Messaging](#) tool.
- **Pre-assign paddle numbers and table numbers**, and upload them through the [Trellis Bulk Upload](#) to reduce the number of moving pieces on the day of the event.
- **Open your silent auction early.** This will encourage pre-bidding and also capture required guest details.
- **Train your volunteers to be check-in experts** early! Share this [template and guide](#) with your volunteers to get them familiar with Trellis before the event.
 - Plan for 1 volunteer for every 30-50 attendees for a smooth check-in flow.

DURING THE EVENT

- Choose how to handle check-in, **either [Rapid Check-in](#) or [Standard Check-in](#)**, based on what information you need to capture for a smooth event.
 - Starting your silent auction will help capture details ahead of time.
 - If you don't capture all the details at the start, it's okay! You can continue adding them throughout the event.
- Have a volunteer or key staff member **triage the check-in line** to point guests towards the right line, and add another touchpoint at the event.
- Use **SMS throughout the night** to share key information, send reminders, and to give easy links to your Trellis page. You can pre-schedule messages through the [Trellis Messaging tool](#).

CHECKING OUT AND POST EVENT RECONCILIATION

- Empower volunteers to walk around to each table and ask if they would like to participate in any fundraising games (ex., Heads and Tails, Raffles, Wine Pulls, etc.), and **[add items to attendees' Trellis carts](#)**.
 - Add [live auction items](#) to attendees' carts just as easily throughout the night.
- Let donors know ahead of time when their credit card will be charged for any Trellis purchases throughout the event.
- Use the **Trellis Pledging page to review any outstanding pledges** and [manage each transaction](#).
- Reference the **All Transaction report for all checkouts** for your fundraiser.