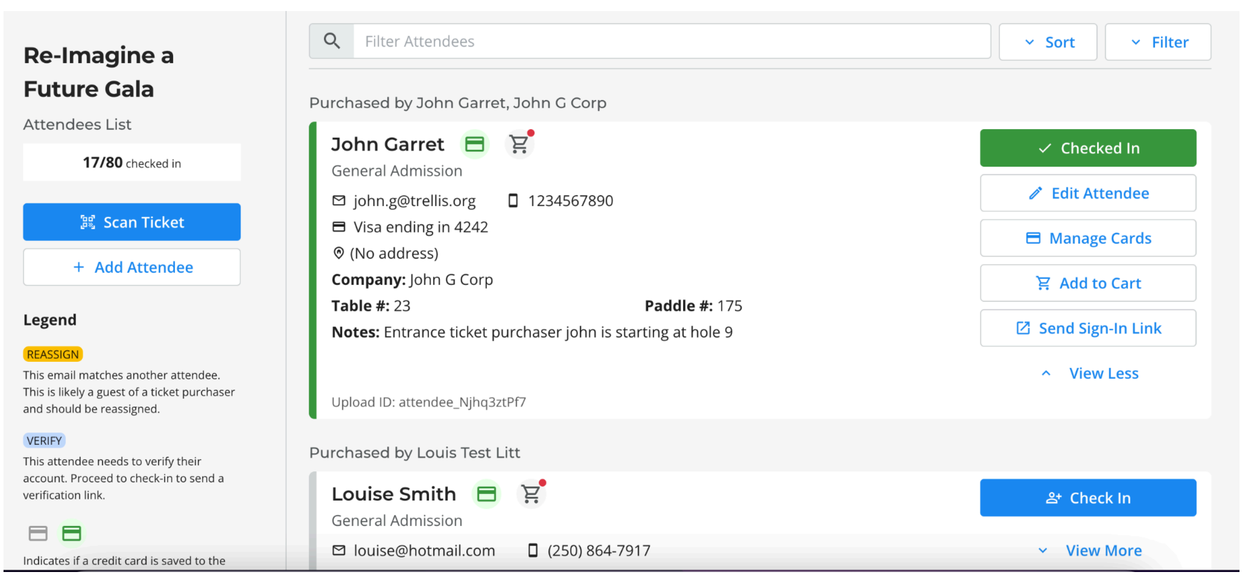
Check-In Tool with Trellis How-to Guide

The Trellis Check-In Tool is a web app used for checking in attendees for a fundraising event. Read on to learn more about using the Check-In Tool and all the features it offers!



Trellis Check-in Tool Pro Tips

Giving Account: A person's user account for the fundraiser on the Trellis platform. Giving Accounts are automatically created for all ticket purchasers and ticket holders. This allows them to save a payment method, bid in a silent auction, speed up future checkouts, and manage their event tickets.

Giving Links: This link expires after 6 hours from the time they are sent (upon purchasing the tickets), and can only be clicked once. If the donors re-click an expired link, our system will prompt them to request a new one.

The Recommended Devices for the Trellis Check-in Tool

The Check-In tool is designed for a tablet device with a Wi-Fi connection (ex. iPad). It can also be used on a phone but the bigger the screen the better!

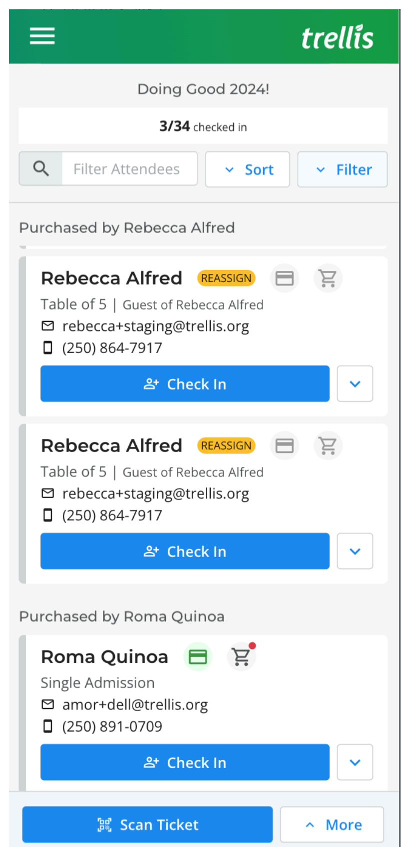
- For Apple devices
  - Only iOS 14.5 or newer versions are supported
  - We recommend scanning QR Codes through a Safari browser
- For Android devices
  - We recommend scanning QR Codes through a Google Chrome browser

Log in to the Check-in Tool

1. Go to https://esm.trellis.org/login
2. Log in to the account with the details provided by your event organizer
3. Click the “Search for a fundraiser” dropdown and select the event
4. Click “Check-In Tool”

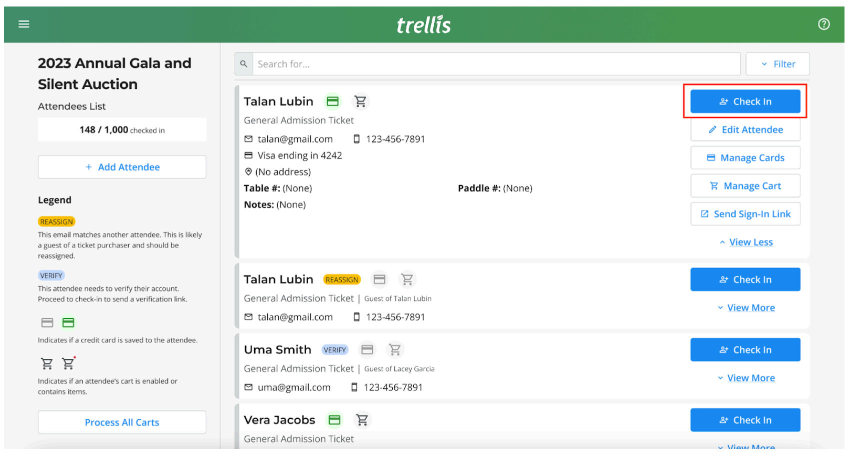
Finding Guests in the Tool

1. Scroll through the list to find the right name.
   a. Note: use the Sort option to choose how the attendees are ordered
2. Use the Search bar at the top of the screen to find a guest.
3. Use the Filter option to narrow down your search.
   a. Note: Remember to clear the Filter after use to restore the full guest search.
4. If using a mobile device or tablet, scan the QR Code on the guest's ticket to find the attendee.

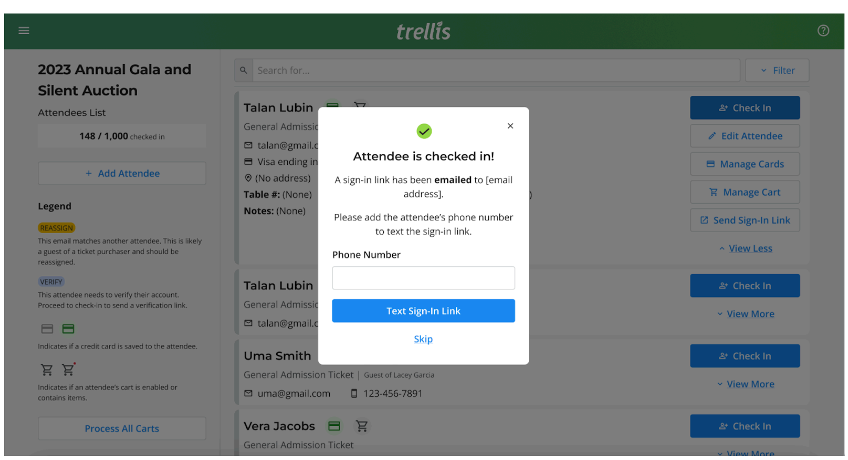


How to Check in an Attendee Using the Check-In Tool

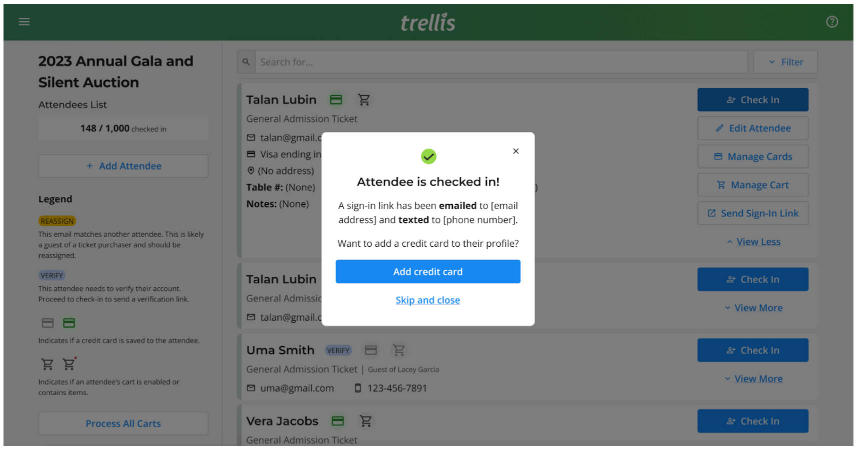
1. When an attendee arrives, ask for their name (recommended), email address, or phone number.
2. Click the blue “Check-In” button to check the attendee in.



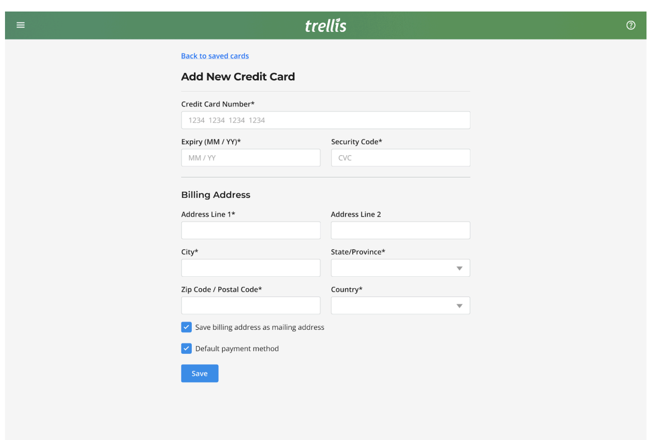
3. The check-in app will then email and text the attendee a sign-in link so they can sign in to their Giving Account on their own device. If the attendee does not have a phone number saved, the Check-In App will prompt the volunteer to gather a phone number.



4. If the attendee does not have a credit card saved to their account, the Check-In Tool will ask if the attendee would like to add a credit card (Trellis recommended to add card details).

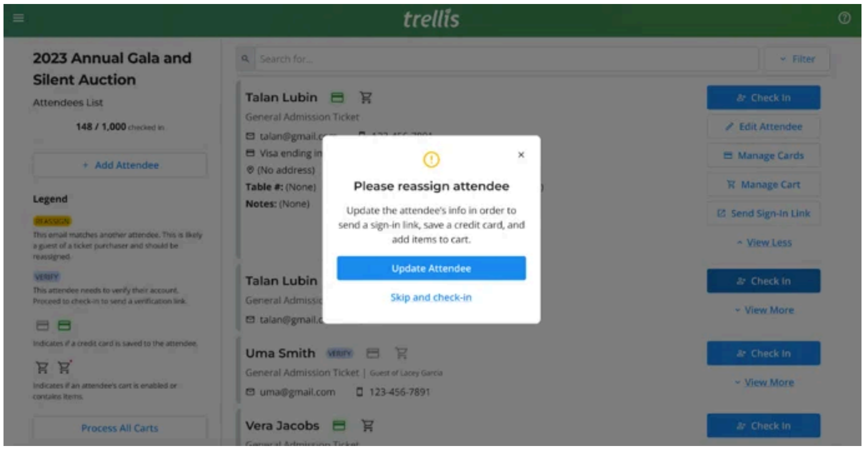


5. *(Optional)* Add a payment method to the attendee's account by completing the form. Hit Save and then you can now move on to the next attendee!

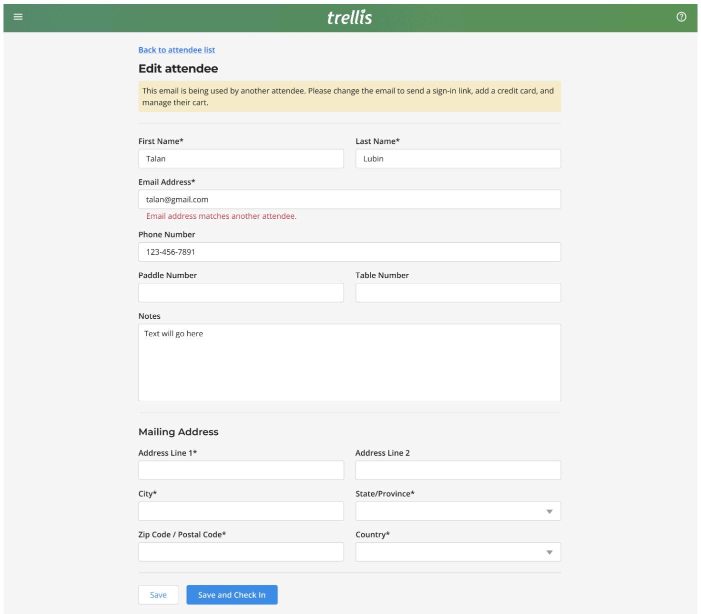


Checking In Attendees that need to be "Reassigned"

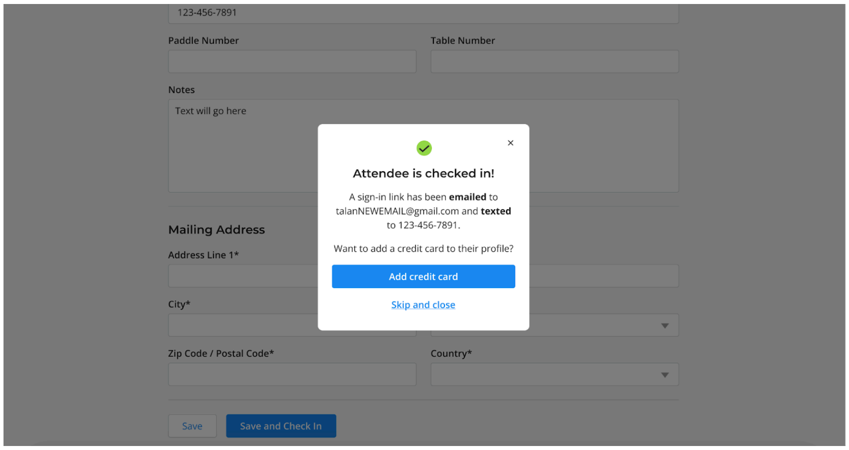
If the attendee says "Reassign", they are likely guests of a ticket purchaser and have not yet been assigned. We recommend reassigning them to the correct person, but this is not required to check them in.



1. Click "Update Attendee" to add the correct information. Then, hit Save and Check-In.



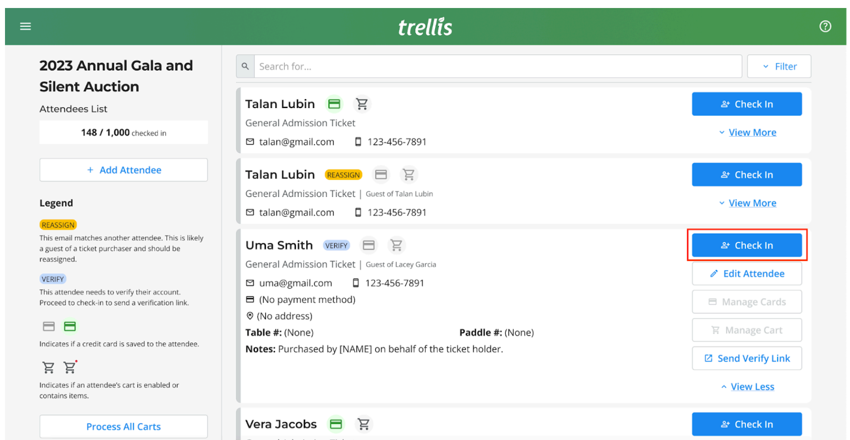
2. The Check-In Tool will check to see if the attendee's email is already in use by another attendee. If the email is not in use, the attendee will be "Verified" and you can proceed with the same steps for a verified attendee. If the attendee is unverified, proceed with the steps below.



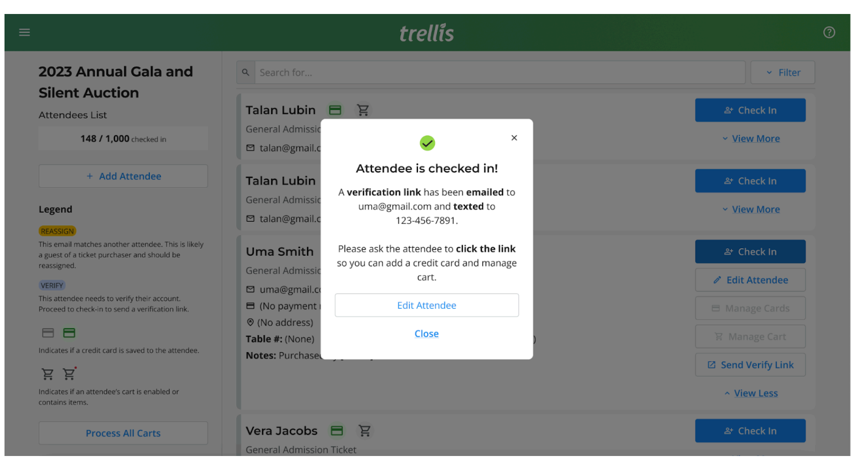
Checking In Attendees that are "Unverified"

If the attendee says "Verify" they'll need to verify their email address. This prevents unauthorized users from accessing their accounts and keeps their information secure.

1. Click the blue Check-In button.



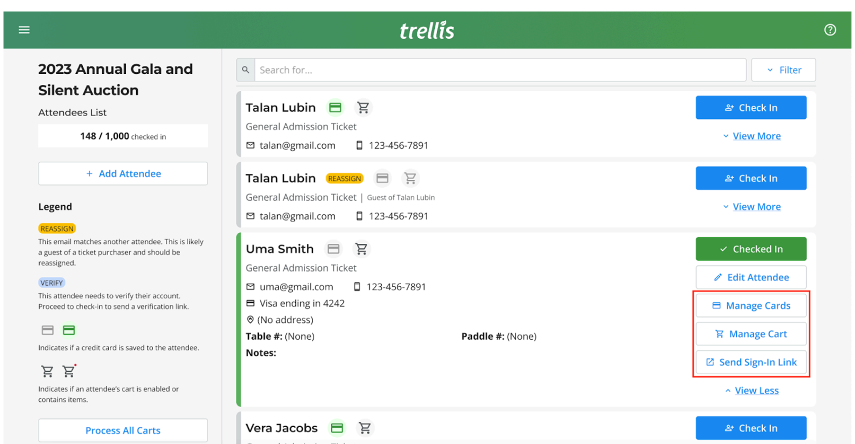
2. The attendee will be checked in, and the Check-In Tool will automatically send a verification link to the attendee's email and phone number on file.



3. Ask the attendee to click on the link in their email or text messages.
    a. While you are waiting for the attendee to verify their email, you can proceed with checking in another guest.
    b. If you don't need to gather the attendee's credit card, you can complete the check-in process here and move on to the next guest.
4. Once the attendee clicks the link, they will be signed into their account on their device, and the attendee status will change from unverified to verified.

Note: *If the attendee does not receive the verification link, please ask them to check their spam folder. Text messages are less likely to be blocked by spam filtering. You can always resend a verification link by clicking "View More" on their profile, then "Send Verify Link".*

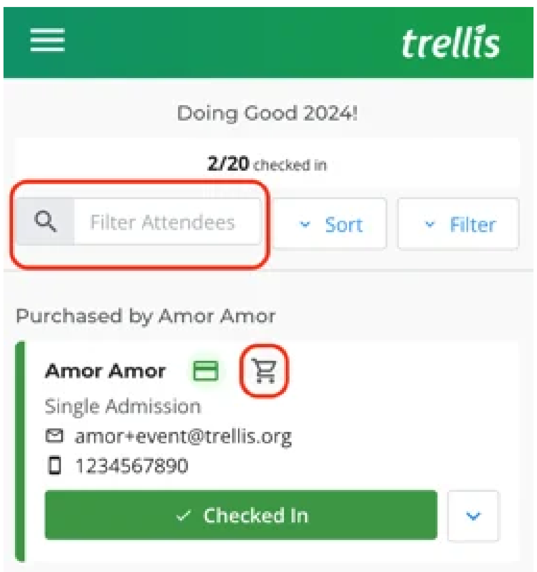
5. You can now use the buttons under the attendee to add a credit card and manage the attendee's cart.

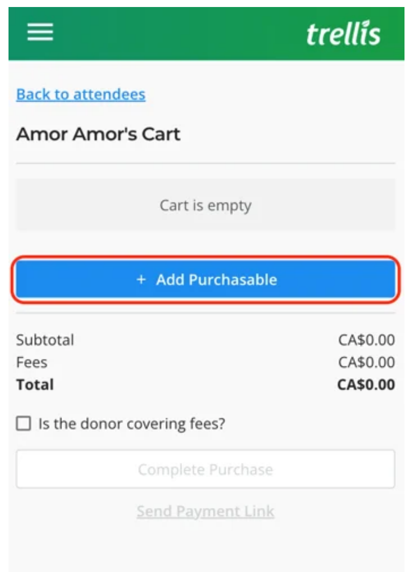


How to Manage Attendee's Cart

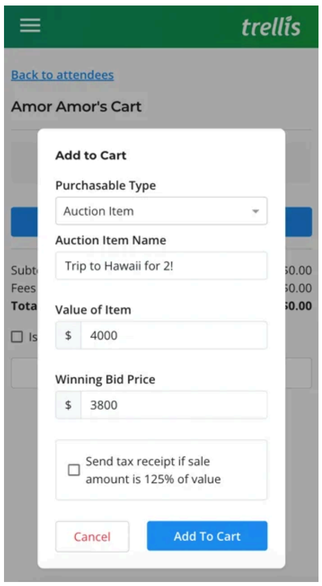
Great! Now everyone is checked in, here's what's next!

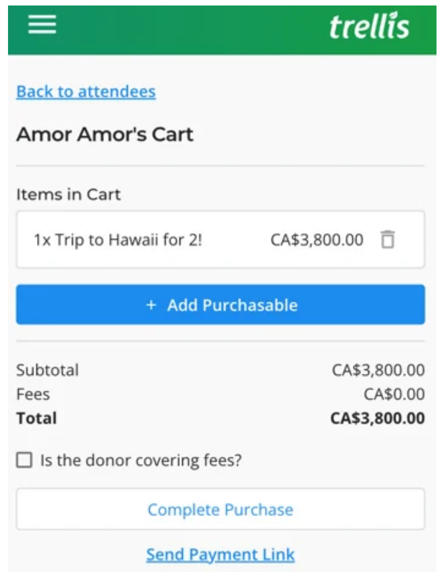
1. Search the attendee's name you want to manage and click the cart icon.
2. Click Add Purchasable to select the item you want to add to their cart.



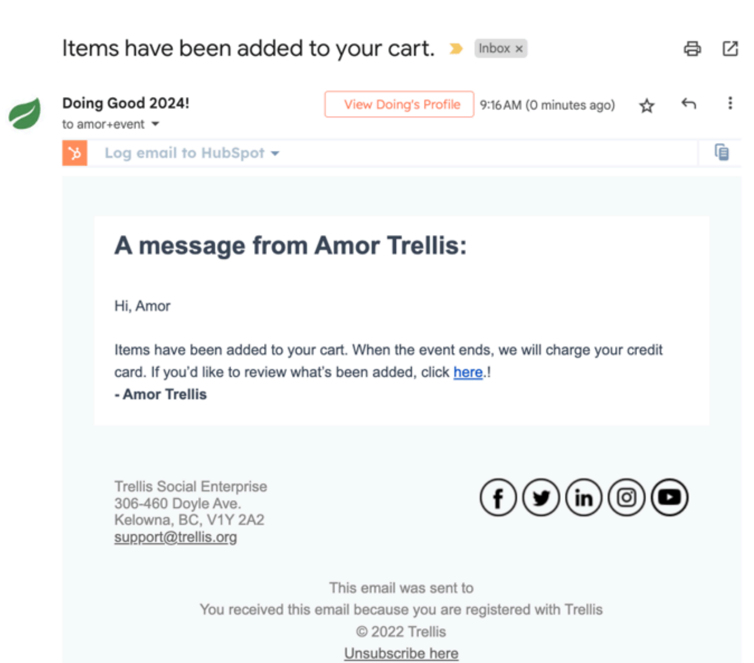


3. Select the Purchasable type and hit Add to Cart.
4. Ask the donor how they want to proceed. You have the option to immediately Complete the Purchase on their behalf (if your donor has their credit card saved) or Send a Payment Link.





If you choose to send a payment link, you will receive a notification that the payment link has been sent and the donor will receive an email with instructions on how to complete their purchase independently like below.



If you choose to complete the purchase, you will receive a notification that the donor has been charged, and they will receive a receipt for their checkout in their email like below.