

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!

Re-Imagine a Future Gala

Attendees List

17/80 checked in

Scan Ticket

+ Add Attendee

Legend

REASSIGN

This email matches another attendee. This is likely a guest of a ticket purchaser and should be reassigned.

VERIFY

This attendee needs to verify their account. Proceed to check-in to send a verification link.

Indicates if a credit card is saved to the

Filter Attendees

SortFilter

Purchased by John Garret, John G Corp

John Garret

General Admission

john.g@trellis.org1234567890

Visa ending in 4242

(No address)

Company: John G Corp

Table #: 23Paddle #: 175

Notes: Entrance ticket purchaser john is starting at hole 9

Upload ID: attendee_Njhg3ztPf7

Checked In

Edit Attendee

Manage Cards

Add to Cart

Send Sign-In Link

View Less

Purchased by Louis Test Litt

Louise Smith

General Admission

louise@hotmail.com(250) 864-7917

Check In

View More

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!

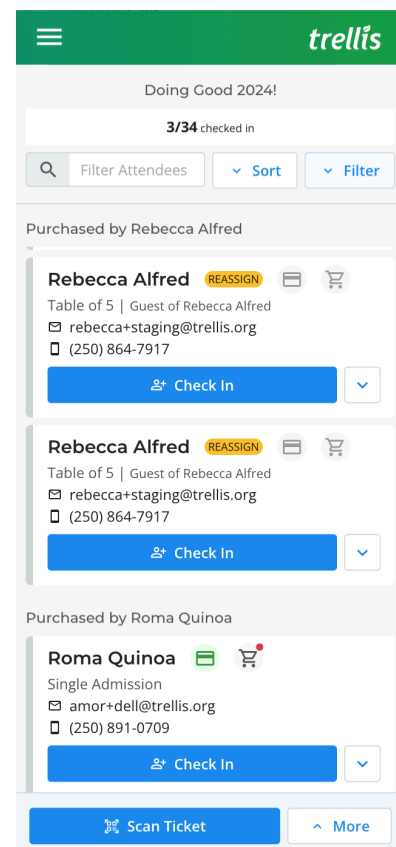
- For Apple devices
 - Only iOS 14.5 or newer versions are supported
 - We recommend scanning QR Codes through a Safari browser
- For Android devices
 - We recommend scanning QR Codes through a Google Chrome browser

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”

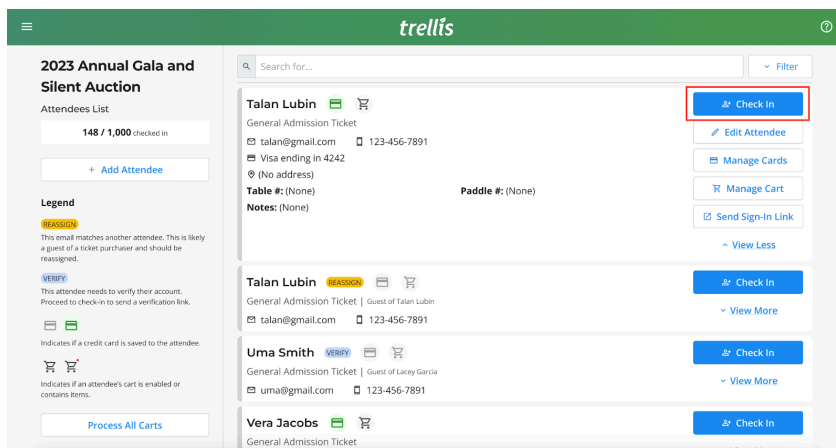
Finding Guests in the Tool

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.

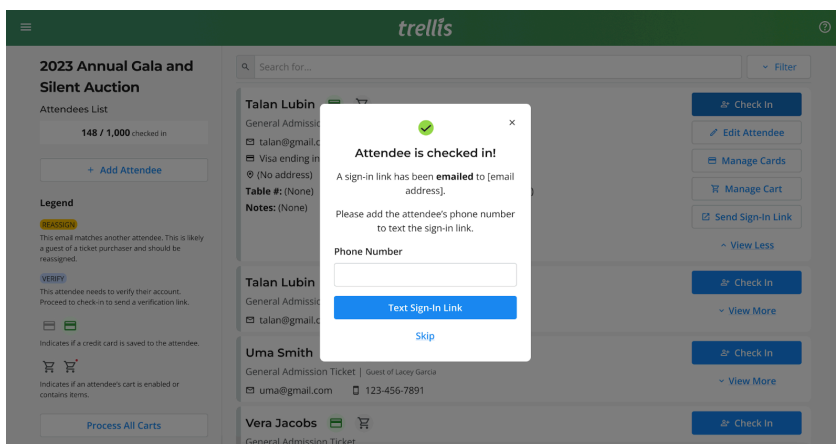


How to Check in an Attendee Using the Check-In Tool

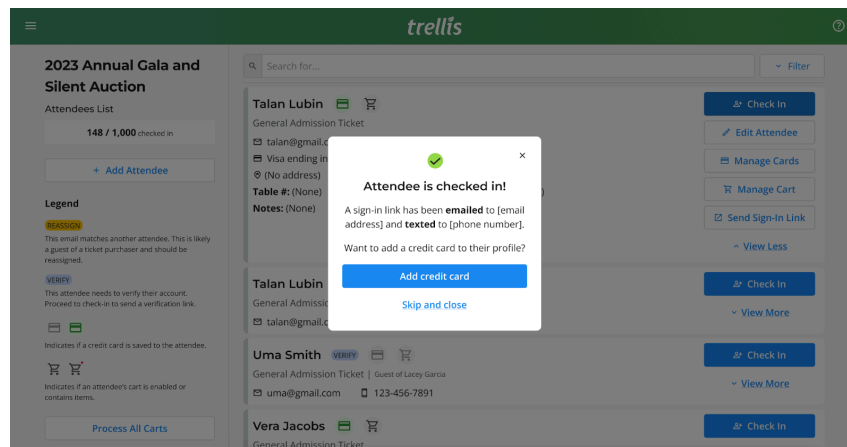
1. When an attendee arrives, ask for their name (recommended), email address, or phone number.
2. Click the blue “Check-In” button to check the attendee in.



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).



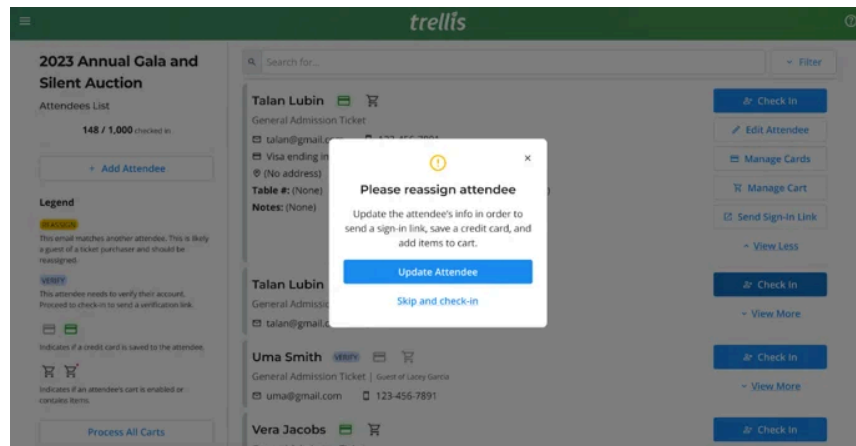
5. (Optional) Add a payment method to the attendee's account by completing the form. Hit Save and then you can now move on to the next attendee!

A screenshot of the 'Add New Credit Card' form in the Trellis system. The form is titled 'Add New Credit Card' and has a 'Back to saved cards' link at the top left. It contains the following fields and sections:

- Credit Card Number***: A text input field with a placeholder '1234 1234 1234 1234'.
- Expiry (MM / YY)***: A text input field with a placeholder 'MM / YY'.
- Security Code***: A text input field with a placeholder 'CVC'.
- Billing Address**: A section containing:
 - Address Line 1***: A text input field.
 - Address Line 2**: A text input field.
 - City***: A text input field.
 - State/Province***: A dropdown menu.
 - Zip Code / Postal Code***: A text input field.
 - Country***: A dropdown menu.
- Save billing address as mailing address**: A checked checkbox.
- Default payment method**: A checked checkbox.
- Save**: A blue button at the bottom.

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.

A screenshot of the 'Edit attendee' form in the Trellis application. The form is titled 'Edit attendee' and has a warning message: 'This email is being used by another attendee. Please change the email to send a sign-in link, add a credit card, and manage their cart.' The form fields are: 'First Name*' (Talan), 'Last Name*' (Lubin), 'Email Address*' (talan@gmail.com, with a red error message 'Email address matches another attendee.'), 'Phone Number' (123-456-7891), 'Paddle Number', 'Table Number', 'Notes' (Text will go here), 'Mailing Address' section with 'Address Line 1*', 'Address Line 2', 'City*', 'State/Province*' (dropdown), 'Zip Code / Postal Code*', and 'Country*' (dropdown). At the bottom are 'Save' and 'Save and Check In' buttons.

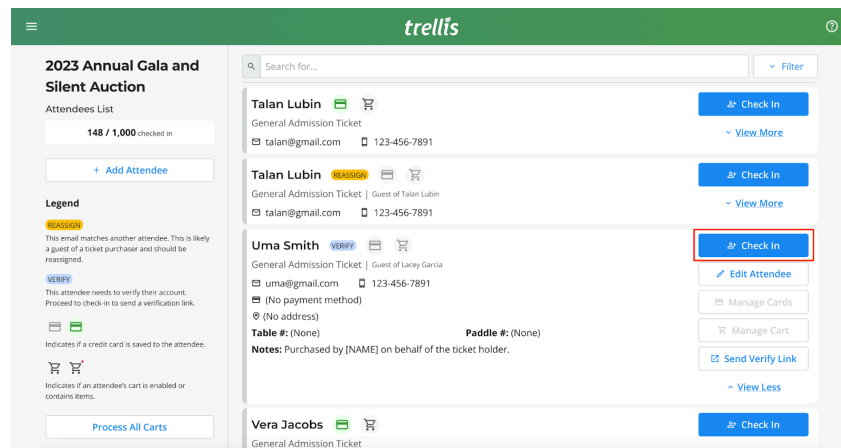
2. The Check-In Tool will check to see if the attendee's email is already in use by another attendee. If the email is not in use, the attendee will be "Verified" and you can proceed with the same steps for a verified attendee. If the attendee is unverified, proceed with the steps below.

The screenshot shows a web form for attendee check-in. At the top, there is a field for the phone number "123-456-7891". Below this are fields for "Paddle Number" and "Table Number". A "Notes" section with the placeholder text "Text will go here" is also present. The "Mailing Address" section includes fields for "Address Line 1*", "City*", "Zip Code / Postal Code*", and "Country*". At the bottom are "Save" and "Save and Check In" buttons. A white modal box is centered on the screen, displaying a green checkmark icon and the text "Attendee is checked in!". The modal also states: "A sign-in link has been emailed to talanNEWEMAIL@gmail.com and texted to 123-456-7891." It asks "Want to add a credit card to their profile?" and provides two options: "Add credit card" (a blue button) and "Skip and close" (a blue link).

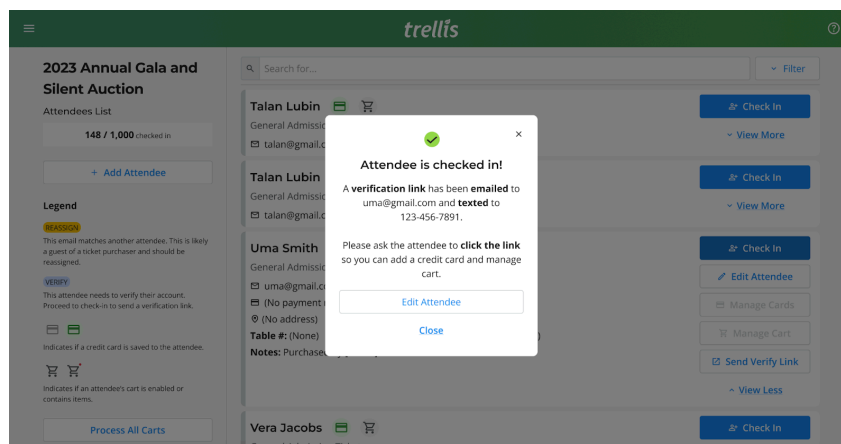
Checking In Attendees that are “Unverified”

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.



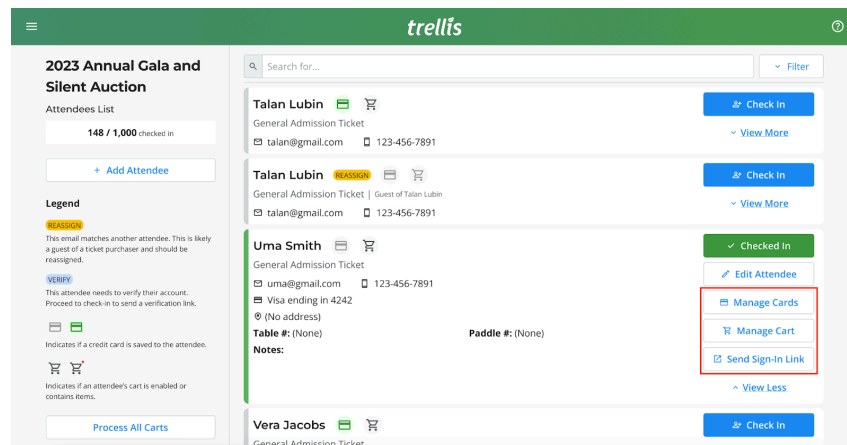
2. The attendee will be checked in, and the Check-In Tool will automatically send a verification link to the attendee’s email and phone number on file.



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”.*

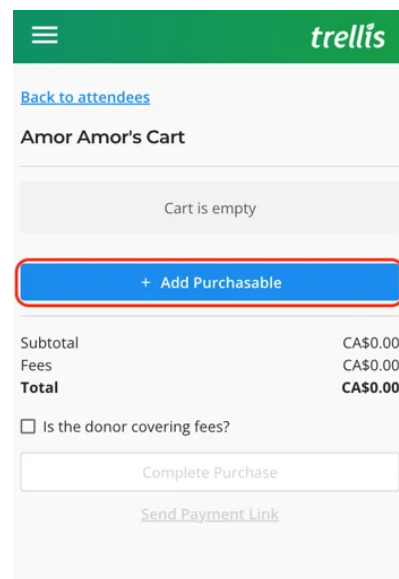
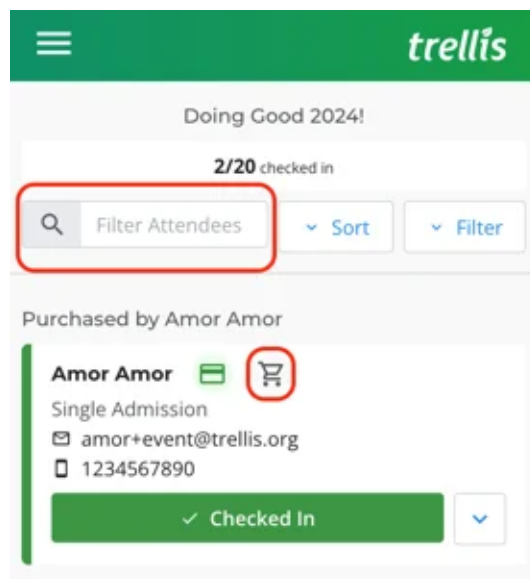
5. You can now use the buttons under the attendee to add a credit card and manage the attendee's cart.



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.

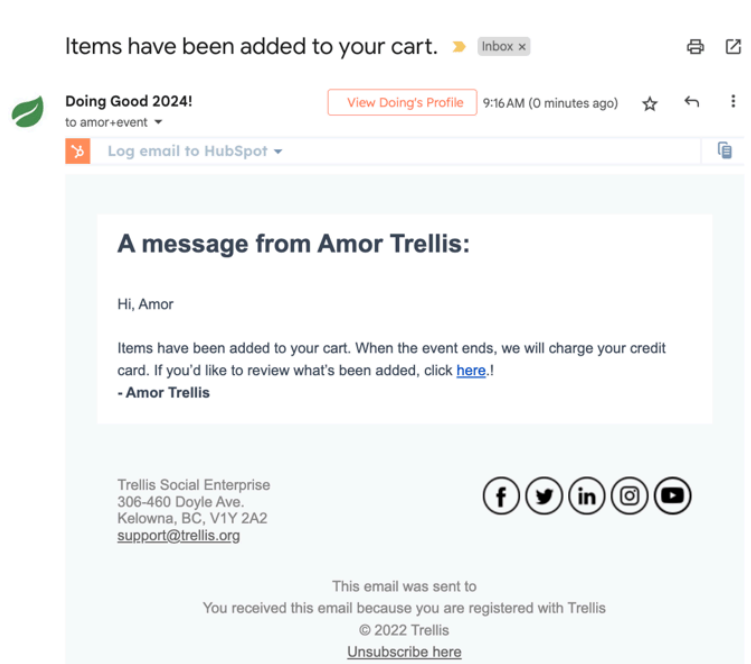


3. Select the Purchasable type and hit Add to Cart.
4. Ask the donor how they want to proceed. You have the option to immediately Complete the Purchase on their behalf (if your donor has their credit card saved) or Send a Payment Link.

The left screenshot shows the 'Add to Cart' modal in the Trellis app. It includes a 'Purchasable Type' dropdown set to 'Auction Item', an 'Auction Item Name' field with 'Trip to Hawaii for 2!', a 'Value of Item' field with '\$ 4000', and a 'Winning Bid Price' field with '\$ 3800'. There is a checkbox for 'Send tax receipt if sale amount is 125% of value' and buttons for 'Cancel' and 'Add To Cart'.

The right screenshot shows the 'Amor Amor's Cart' page. It lists 'Items in Cart' with '1x Trip to Hawaii for 2!' at CA\$3,800.00. Below the list is a '+ Add Purchasable' button. A summary section shows 'Subtotal' as CA\$3,800.00, 'Fees' as CA\$0.00, and 'Total' as CA\$3,800.00. At the bottom, there is a checkbox for 'Is the donor covering fees?' and buttons for 'Complete Purchase' and 'Send 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.

