

# How to manage and use the Check-In Tool for your Events as the Organizer

Hey event organizers! In this guide we'll walk you through how to make the most of the Trellis Check-In Tool for your event.

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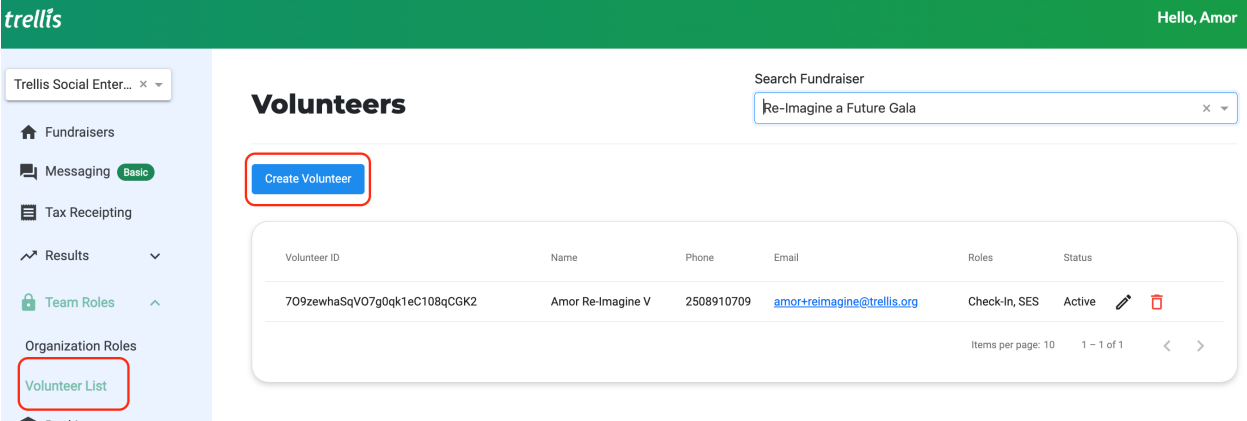
# Part 1: How to Assign Volunteers

If you have volunteers assisting you with checking in guests at the event, you can add them as a “Volunteer” so they have access to the Check-In Tool. You can then configure which features they have access to within the Check-In Tool.

By default, any organization users have full access to all functionality in the Check-In Tool!

## How to create volunteers and assign them roles:

1. From the dashboard, go to Dashboard > Team Roles > Volunteer List > Select the fundraiser page you want to add a volunteer(top right dropdown) and click Create Vounteer.



2. Add the volunteer's full name, email, phone number, and which roles you would like to give them and hit Save.

**Create Volunteer** ✕

**First Name\***

**Last Name\***

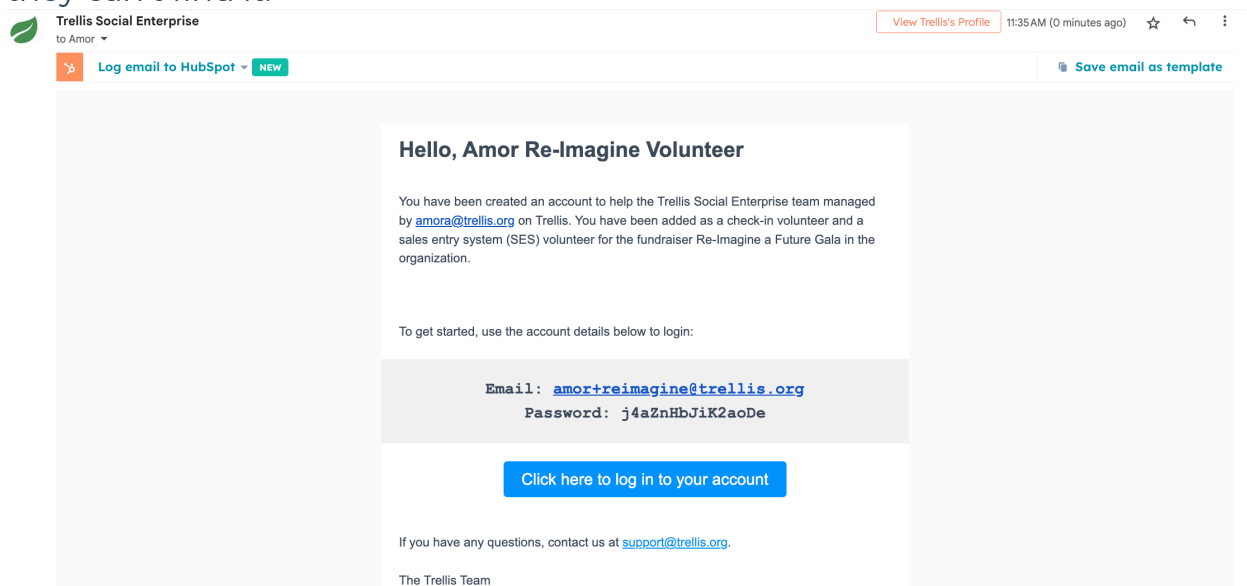
**Email\***

**Phone**



**Roles\***

Cancel Save

3. Your volunteer will receive their access credentials to the check-in tool through their email. Make sure you ask them to check their spam folder if they can't find it.



4. Once you create the volunteer, click the Pen icon to configure their role

Volunteer ID	Name	Phone	Email	Roles	Status
709zewhaSqV07g0qk1eC108qCGK2	Amor Re-Imagine V	2508910709	<a href="mailto:amor+reimagine@trellis.org">amor+reimagine@trellis.org</a>	Check-In, SES	Active  

### Edit Volunteer

#### Sales Entry System (SES) Role

This allows the volunteer to use the Sales Entry System (SES) to accept purchases at a Point of Sale.

Enabled

**Configurations:**

Can search for constituents in RE NXT

#### Check-In Role

This allows the volunteer to use the check-in app to check-in attendees and update their information.

Enabled

**Configurations:**

Can add items to cart

Can charge carts individually

Can charge all attendee carts at once

- By default, anyone with the Check-In Tool role can check attendees in at the event.
- “Can add items to cart”: this volunteer can also add items to an attendee’s cart, such as donations, tickets, or items
- “Can charge carts individually”: this volunteer can process an attendee’s cart, thus completing their purchase
- “Can charge all attendee carts at once”: this volunteer can see and click a button that checks out all attendee carts. We recommend disabling this for most volunteers, and only enabling it for trusted volunteers.

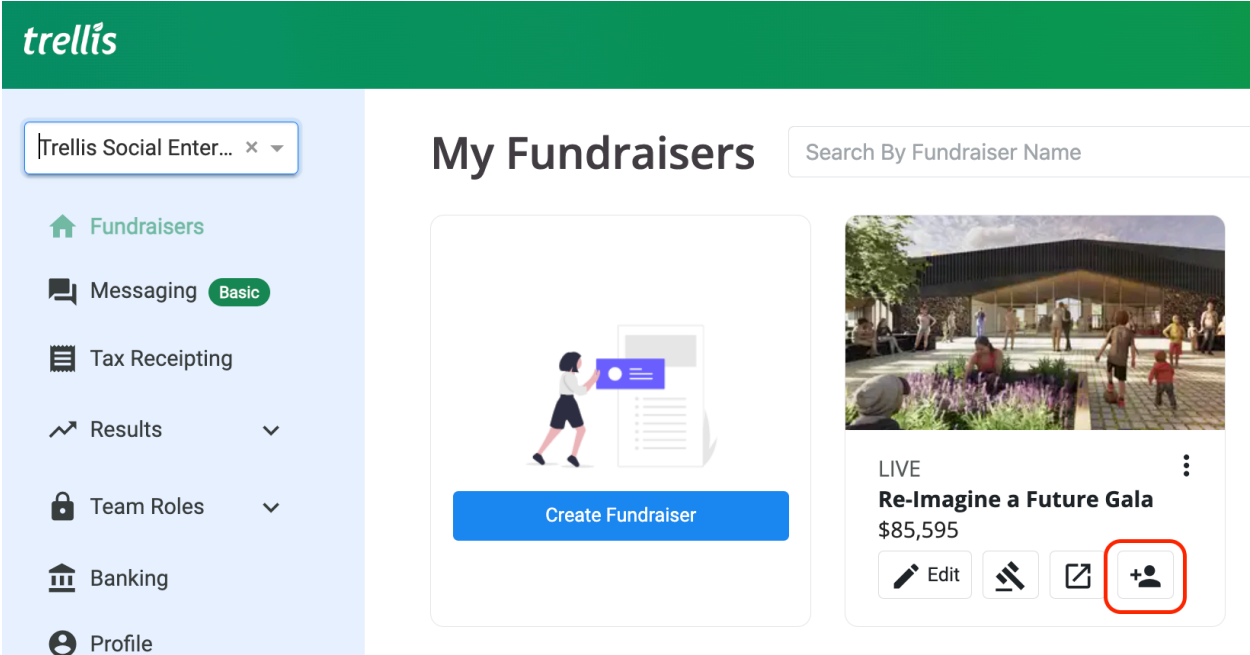
7. Click save, and your volunteer is all set!

# Part 2: Accessing the Check-In Tool on Event Day

We designed our Check-In Tool to be easily used by staff or volunteers across all devices.

## How to open and sign-in to the Check-In Tool using your Trellis Admin Account:

1. Using your Trellis admin account you can login and click on the person icon below the fundraiser you want to check in your attendees.



2. Select Check-in Tool.

# Get Started

## Select Fundraiser

 ✕ ▼

## Select app

👤+ Check-In Tool ➤

🏪 Sales Entry System (SES) ➤

3. You will now see the attendee list for the Check-In Tool, and you're ready to get started!

☰ trellis

### Re-Imagine a Future Gala

Attendees List

1/22 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

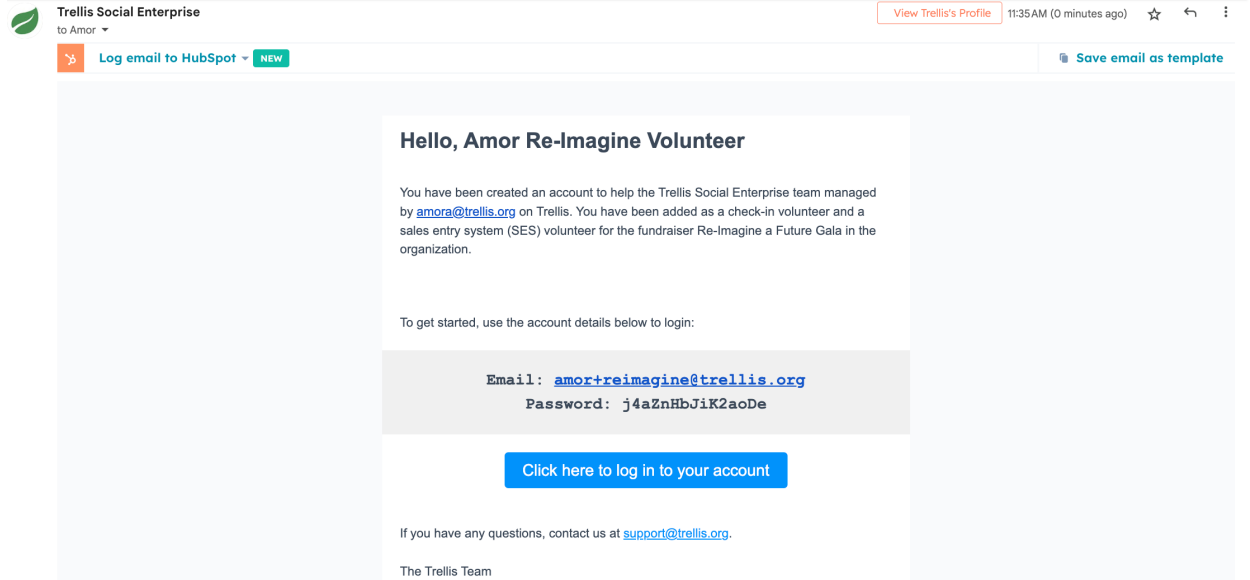
Sort Filter

Purchased by Rebecca Alfred

<b>Rebecca Alfred</b> <span style="background-color: green; color: white; padding: 2px;">👤</span> <span>🛒</span> Early Bird Admission 📧 rebecca+testing1234@trellis.org 📞 (250) 864-7917	<span>👤</span> Check In <a href="#">View More</a>
<b>Rebecca Alfred</b> <span style="background-color: yellow; color: black; padding: 2px;">REASSIGN</span> <span>👤</span> <span>🛒</span> Early Bird Admission 📧 rebecca+testing1234@trellis.org 📞 (250) 864-7917	<span>👤</span> Check In <a href="#">View More</a>
<b>Rebecca Alfred</b> <span style="background-color: yellow; color: black; padding: 2px;">REASSIGN</span> <span>👤</span> <span>🛒</span> General Admission 📧 rebecca+testing1234@trellis.org 📞 (250) 864-7917	<span>👤</span> Check In <a href="#">View More</a>
<b>Rebecca Alfred</b> <span style="background-color: yellow; color: black; padding: 2px;">REASSIGN</span> <span>👤</span> <span>🛒</span> Early Bird Admission 📧 rebecca+testing1234@trellis.org 📞 (250) 864-7917	<span>👤</span> Check In <a href="#">View More</a>

## How to open and sign-in to the Check-In Tool as a Volunteer:

1. Once the organizer has added you as the volunteer you will receive an email like below. Click here to log in to your account with your password to access the check-in tool.



The screenshot shows an email interface. At the top left, it says "Trellis Social Enterprise to Amor". At the top right, there is a "View Trellis's Profile" link, the time "11:35AM (0 minutes ago)", and icons for star, back, and menu. Below the header, there are two buttons: "Log email to HubSpot" with a "NEW" tag, and "Save email as template". The main content of the email is as follows:

**Hello, Amor Re-Imagine Volunteer**

You have been created an account to help the Trellis Social Enterprise team managed by [amora@trellis.org](mailto:amora@trellis.org) on Trellis. You have been added as a check-in volunteer and a sales entry system (SES) volunteer for the fundraiser Re-Imagine a Future Gala in the organization.

To get started, use the account details below to login:

**Email:** [amortreimagine@trellis.org](mailto:amortreimagine@trellis.org)  
**Password:** `j4aZnHbJiK2aoDe`

[Click here to log in to your account](#)


If you have any questions, contact us at [support@trellis.org](mailto:support@trellis.org).

The Trellis Team

2. Sign in with your email and the password provided.

**trellis**

 Sign in with email

 Sign in with Google

By continuing, you are indicating that you accept our [Terms of Service](#) and [Privacy Policy](#).

## Sign in

Email

amor+reimagine@trellis.org

Password

••••••••••

[Trouble signing in?](#)

**SIGN IN**

[Terms of Service](#) [Privacy Policy](#)



3. Select Check-in Tool and you will now see the attendee list for the Check-In Tool, and you're ready to get started!

# Get Started

## Select Fundraiser

Re-Imagine a Future Gala

## Select app

- Check-In Tool
- Sales Entry System (SES)

The screenshot shows the Trellis interface for the fundraiser 'Re-Imagine a Future Gala'. On the left, there is a sidebar with a menu icon, the fundraiser name, and an 'Attendees List' section showing '1/22 checked in'. Below this are buttons for 'Scan Ticket' and 'Add Attendee'. A 'Legend' section explains 'REASSIGN' (email matches another attendee) and 'VERIFY' (attendee needs to verify their account). On the right, there is a search bar 'Filter Attendees' and 'Sort' and 'Filter' dropdowns. The main area displays a list of attendees purchased by Rebecca Alfred, with four entries for 'Rebecca Alfred' (Early Bird Admission) and one for 'General Admission'. Each entry includes contact information and a 'Check In' button.

Name	Admission Type	Contact Info	Action
Rebecca Alfred	Early Bird Admission	rebecca+testing1234@trellis.org (250) 864-7917	Check In
Rebecca Alfred	Early Bird Admission	rebecca+testing1234@trellis.org (250) 864-7917	Check In
Rebecca Alfred	General Admission	rebecca+testing1234@trellis.org (250) 864-7917	Check In
Rebecca Alfred	Early Bird Admission	rebecca+testing1234@trellis.org (250) 864-7917	Check In

# Part 3: How to Check in an Attendee Using the Check-In Tool

From the main page of the Check-In Tool, you will see the list of attendees that are available for the event.

Each attendee contains:



1. A check-in button, that allows you to check in the attendee.
2. A credit card icon, indicating if a payment method has been saved to their account.
3. A cart icon, indicating if they have items in their cart.
4. A view more button, that expands all available attendee information and next steps you can take for an attendee.

The screenshot shows the Trellis Check-In Tool interface. At the top, there is a green header with the Trellis logo and a search bar. Below the header, the event title "2023 Annual Gala and Silent Auction" is displayed, along with a progress indicator showing "148 / 1,000 checked in". A sidebar on the left contains a "Legend" section with icons for "REASSIGN", "VERIFY", credit card, and cart, each with a brief explanation. The main content area lists attendees with their names, ticket types, contact information, and action buttons like "Check In", "View More", "Edit Attendee", "Manage Cards", and "Manage Cart".

Name	Ticket Type	Contact Info	Payment Method	Cart	Actions
Allison Hamilton	General Admission Ticket	robin@trellis.org   778-822-2525	None	None	Check In, View More
Allison Hamilton	General Admission Ticket   Guest of Allison Hamilton	robin@trellis.org   778-822-2525	None	None	Check In, View More
Bronson Jones	General Admission Ticket   Guest of Kierra Korsgaard	robin@trellis.org   778-822-2525	None	None	Check In, View More
Cynthia Culhane	General Admission Ticket	robin@trellis.org   778-822-2525	Visa ending in 4242	(No address)	Check In, Edit Attendee, Manage Cards, Manage Cart, Send Sign-In Link, View Less
Cynthia Culhane	General Admission Ticket	robin@trellis.org   778-822-2525	None	None	Check In, View More

## There are three types of attendees in the check-in tool:

**1. Verified attendees:** these attendees are complete and ready to check-in

**Allison Hamilton**  




General Admission Ticket

✉ robin@trellis.org    📞 778-822-2525

[+ Check In](#)

[View More](#)

**2. Reassign attendees:** these attendees are likely guests of a ticket purchaser and the purchaser did not assign their tickets before the event. We recommend reassigning them to the correct person, but this is not required to check them in. Note that you will not be able to manage this attendee's credit cards or cart until they have been reassigned.

**Allison Hamilton**   




General Admission Ticket |  
Guest of Allison Hamilton

✉ robin@trellis.org    📞 778-822-2525

[+ Check In](#)

[View More](#)

**3. Unverified attendees:** these attendees can be checked in, but they will need to verify their email address before you can save a credit card to their account or add purchasables to their cart. This prevents unauthorized users from accessing their account and keeps their information secure.

**Bronson Jones**   

General Admission Ticket |  
Guest of Kierra Korsgaard

✉ robin@trellis.org    📞 778-822-2525

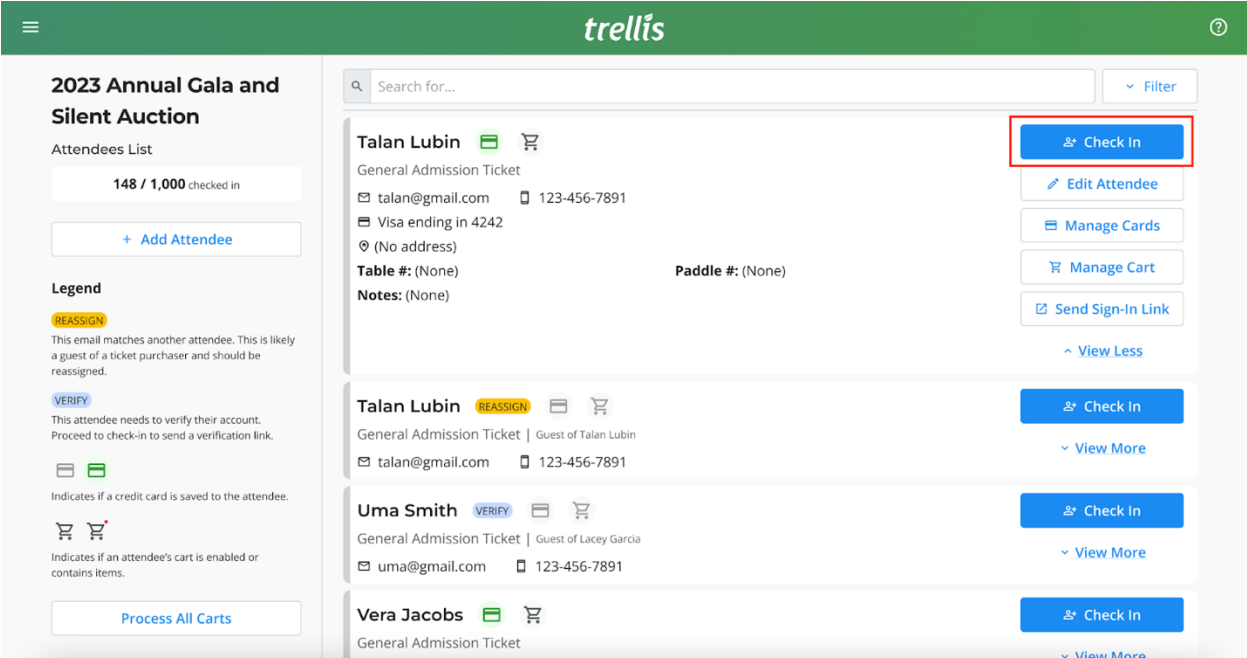
[+ Check In](#)

[View More](#)

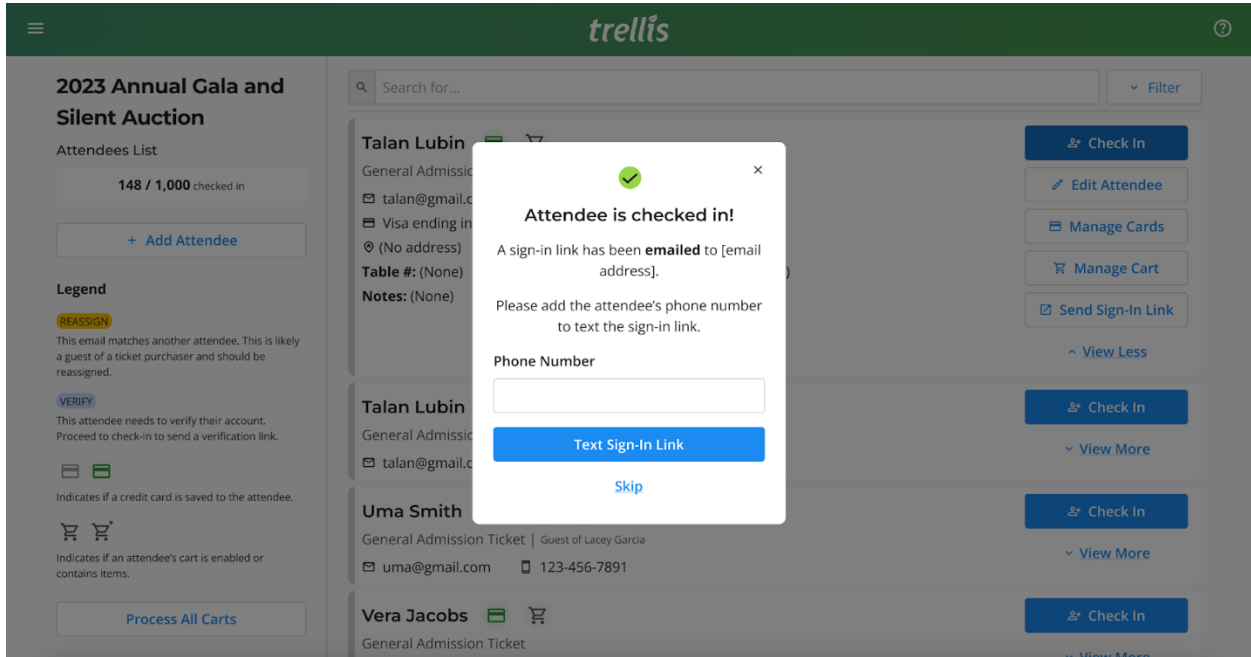
# How to check-in a verified attendee

How to check-in a verified attendee:

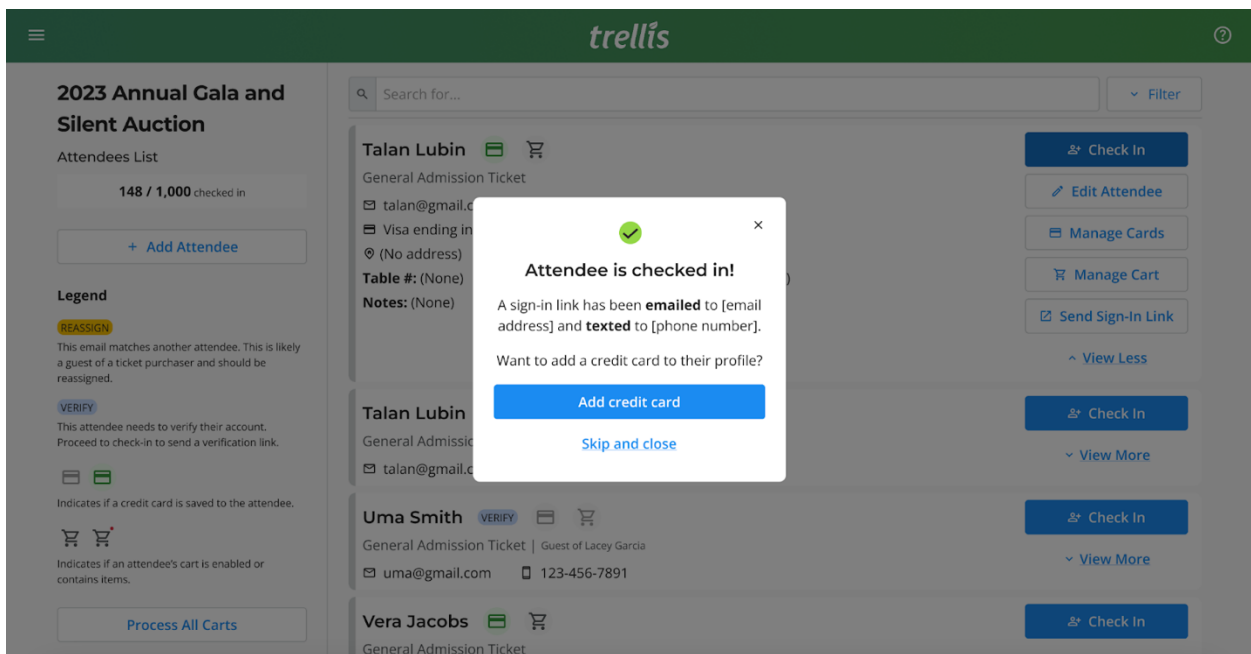
1. When an attendee arrives, ask for their name (recommended), email address, or phone number.
  - a. You can use the search bar to search for their name, or scroll through the list of attendees.
  - b. Names are listed in alphabetical order by first name.
  - c. You can also scan the QR code on their ticket.
2. If the search term matches an attendee, the attendee record will appear on the screen.
3. Click the blue “Check-In” button to check the attendee in.



4. 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.



5. 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.



6. Save a payment method to the attendee's account by completing the form.

The screenshot shows a web interface for adding a new credit card. At the top, there is a green header with the Trellis logo and a help icon. Below the header, there is a navigation link "Back to saved cards". The main heading is "Add New Credit Card". The form contains several fields: "Credit Card Number\*" with a placeholder "1234 1234 1234 1234"; "Expiry (MM / YY)\*" with a placeholder "MM / YY"; "Security Code\*" with a placeholder "CVC"; "Billing Address" section with "Address Line 1\*", "Address Line 2", "City\*", "State/Province\*" (dropdown), "Zip Code / Postal Code\*", and "Country\*" (dropdown). At the bottom, there are two checked checkboxes: "Save billing address as mailing address" and "Default payment method", followed by a blue "Save" button.

7. The attendee is now complete and you can move on to the next guest! 

# How to check-in a “reassign” attendee

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.

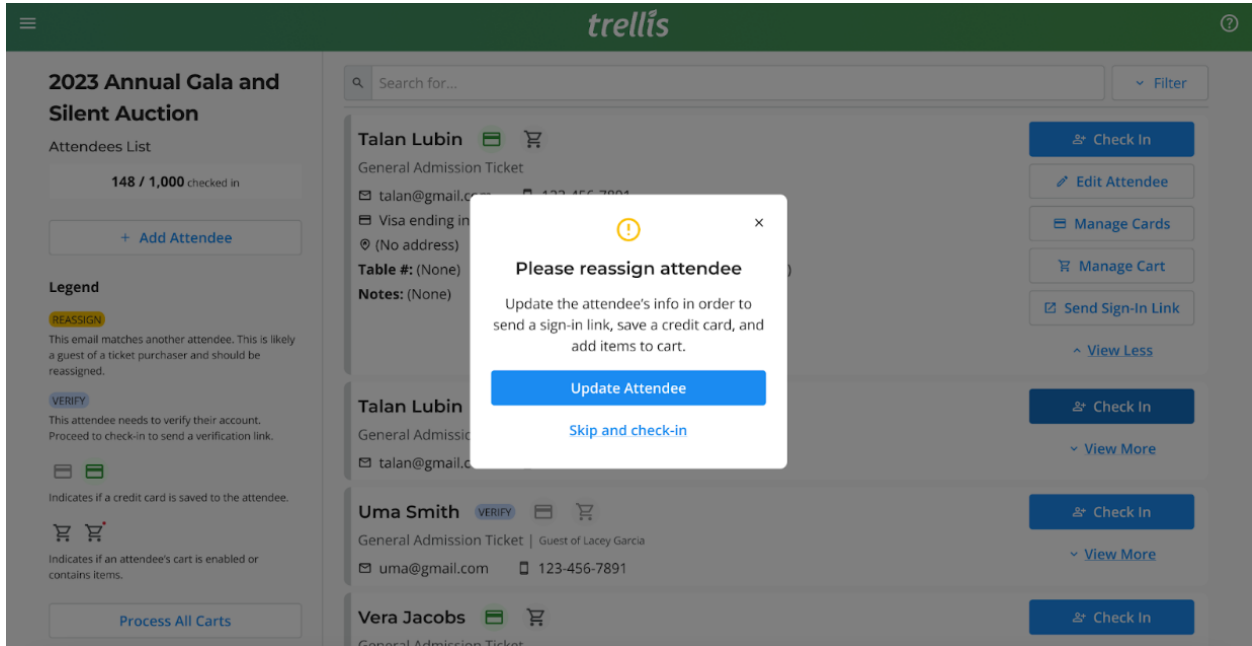
## To get started:

1. Search for the attendee. If the attendee does not appear, try asking the attendee for the name, email, or phone number of the person who purchased tickets for them.
2. Click the blue “check-in” button

The screenshot shows the Trellis event management interface for the "2023 Annual Gala and Silent Auction". The interface is divided into a left sidebar and a main content area. The sidebar contains an "Attendees List" section showing "148 / 1,000 checked in" and a "+ Add Attendee" button. Below this is a "Legend" section with three items: "REASSIGN" (yellow background), "VERIFY" (blue background), and a credit card icon (green background). The main content area features a search bar at the top with the text "Search for..." and a "Filter" dropdown. Below the search bar is a list of attendees. The first attendee is "Talan Lubin" with a green credit card icon and a shopping cart icon. The second attendee is "Talan Lubin" with a yellow "REASSIGN" tag, a credit card icon, and a shopping cart icon. The third attendee is "Uma Smith" with a blue "VERIFY" tag, a credit card icon, and a shopping cart icon. The fourth attendee is "Vera Jacobs" with a green credit card icon and a shopping cart icon. Each attendee entry includes their name, ticket type, contact information, and a blue "Check In" button. The "Check In" button for the second attendee (Talan Lubin, REASSIGN) is highlighted with a red box. Other buttons include "View More", "Edit Attendee", "Manage Cards", "Manage Cart", and "Send Sign-In Link".

3. The Check-In Tool will ask if you want to reassign the attendee.

*You can skip and check-in if you do not want to gather the attendee details. Note that you will not be able to manage this attendee's credit cards or cart until they have been reassigned.*





4. Click “Update Attendee” to add the correct information.

[Back to attendee list](#)

### Edit attendee

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.

First Name\*  Last Name\*

Email Address\*   
Email address matches another attendee.

Phone Number

Paddle Number  Table Number

Notes

Mailing Address

Address Line 1\*  Address Line 2

City\*  State/Province\*

Zip Code / Postal Code\*  Country\*

5. Once updated, click “Save and Check-In”.

6. 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 image shows a registration form with a modal overlay. The form fields include: a phone number field with '123-456-7891', 'Paddle Number', 'Table Number', 'Notes' (with placeholder 'Text will go here'), 'Mailing Address' section with 'Address Line 1\*', 'City\*', 'Zip Code / Postal Code\*', and 'Country\*'. At the bottom are 'Save' and 'Save and Check In' buttons. The modal overlay has a green checkmark icon and the text: 'Attendee is checked in!', 'A sign-in link has been emailed to talanNEWEMAIL@gmail.com and texted to 123-456-7891.', and 'Want to add a credit card to their profile?'. It contains two buttons: 'Add credit card' and 'Skip and close'.

# How to check-in an “unverified” attendee

If the attendee says “Verify” - then they need to verify their email address. This prevents unauthorized users from accessing their account and keeps their information secure.

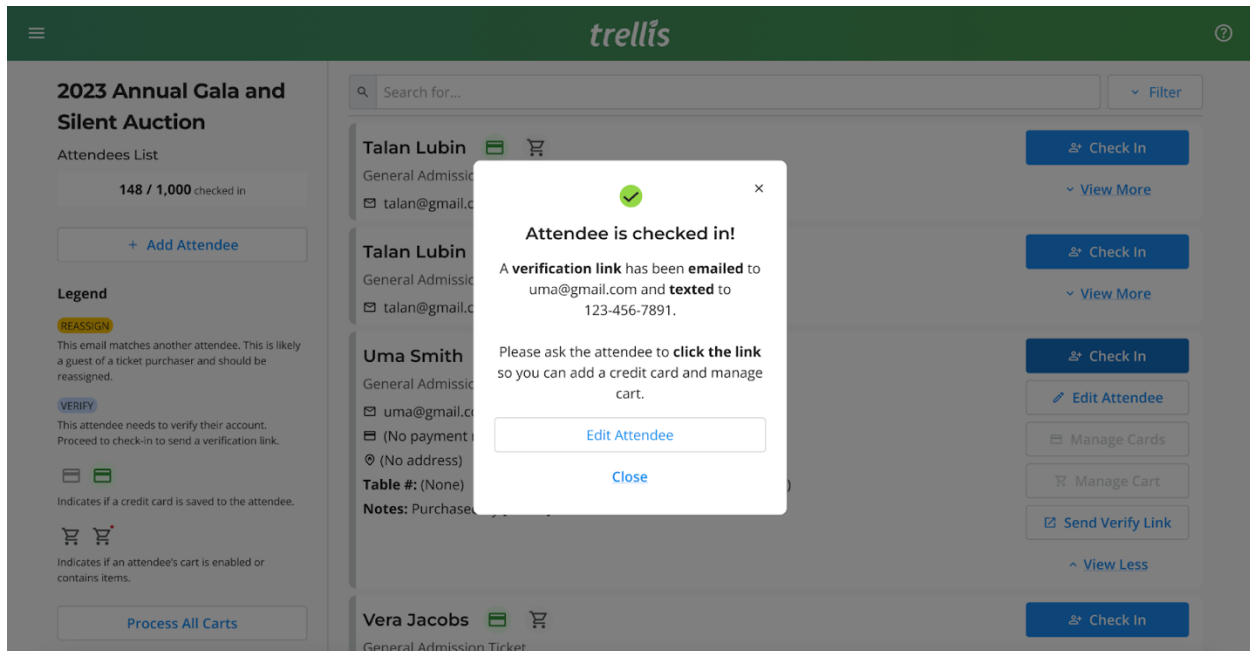
## To get started:

1. Find the attendee and click the blue “Check-In” button

The screenshot displays the Trellis event management interface for the "2023 Annual Gala and Silent Auction". On the left, a sidebar shows the event title, the number of attendees checked in (148 / 1,000), and a legend for status icons: REASSIGN (yellow), VERIFY (blue), and a credit card icon (green). The main area features a search bar and a list of attendees. The third attendee, Uma Smith, is highlighted with a red box around her "Check In" button. Her status is "VERIFY", and her details include contact information, ticket type, and a note about the purchase.

Attendee Name	Status	Check In Button
Talan Lubin	General Admission Ticket	Check In
Talan Lubin	General Admission Ticket   Guest of Talan Lubin	Check In
Uma Smith	General Admission Ticket   Guest of Lacey Garcia	Check In
Vera Jacobs	General Admission Ticket	Check In

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. Please 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.

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

*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".*

The screenshot displays the Trellis event management interface for the "2023 Annual Gala and Silent Auction". The interface is divided into a left sidebar and a main content area. The sidebar includes a search bar, a filter dropdown, and a list of attendees with their status (checked in, REASSIGN, VERIFY). The main content area shows a list of attendees with their details and management options. The "Uma Smith" profile is highlighted with a red box around the "Manage Cards", "Manage Cart", and "Send Sign-In Link" buttons.

**2023 Annual Gala and Silent Auction**

Attendees List

148 / 1,000 checked in

+ 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 attendee.

Indicates if an attendee's cart is enabled or contains items.

Process All Carts

Search for... Filter

**Talan Lubin** [Credit Card Icon] [Cart Icon]  
General Admission Ticket  
talan@gmail.com 123-456-7891  
Check In View More

**Talan Lubin** [REASSIGN] [Credit Card Icon] [Cart Icon]  
General Admission Ticket | Guest of Talan Lubin  
talan@gmail.com 123-456-7891  
Check In View More

**Uma Smith** [Credit Card Icon] [Cart Icon]  
General Admission Ticket  
uma@gmail.com 123-456-7891  
Visa ending in 4242  
(No address)  
Table #: (None) Paddle #: (None)  
Notes:  
Checked In  
Edit Attendee  
Manage Cards  
Manage Cart  
Send Sign-In Link  
View Less

**Vera Jacobs** [Credit Card Icon] [Cart Icon]  
General Admission Ticket  
Check In

# Part 4: Check-In Tool Feature Review

Here are all the features that are available in the Check-In Tool and whether or not you can configure them to your needs.

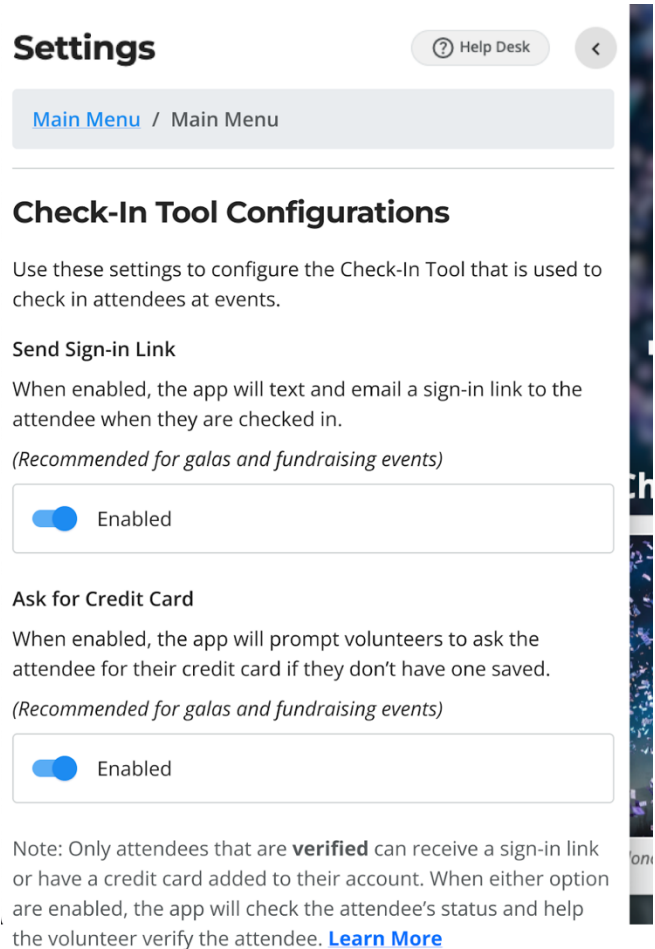
Feature	Description
Check-in an attendee	The bread and butter of the Check-In Tool! Mark an attendee as present at an event.
Edit the attendee's information	Includes an attendee's name, email, phone number, table number, paddle number, mailing address, and any notes you may have for this attendee.
Send the attendee a "Sign In Link"	Attendees can click the Sign In Link on their own device and be automatically signed into their Giving Account on the Trellis platform. This means faster purchases on their end, with all their saved information!
Save a credit card to the attendee's account	Save a credit card to the attendee so that you can ensure there's no delay closing out carts at the end of an event.
Manage an attendee's cart	Includes: <ul style="list-style-type: none"> <li>•View an attendee's cart</li> <li>•Add something for purchase, such as donations, tickets, or items</li> <li>•Checkout an attendee and process their card</li> <li>•Send the attendee a payment link, for them to checkout on their own device</li> </ul>
Check if the attendee needs to be reassigned	When someone purchases tickets for a guest and doesn't enter their guest's information, the Check-In Tool will let you know if the attendee should be reassigned.
Check if the attendee needs to verify their email address	If the attendee has an existing Giving Account with us (usually from a previous fundraiser) the Check-In Tool will indicate if they need to verify their email address before you can add a credit card to their account and manage their cart.

# Part 5: How to Configure the Check-In Tool

There are many reasons why you might want to configure the Check-In Tool to suit your needs!

For most fundraisers, **we recommend enabling all configurations.** This will give you and your volunteers the best experience and ensure you gather important information from attendees to use the full functionality of the Check-In Tool.

## Here's how to set up the configurations:



The screenshot shows the 'Settings' page for the Check-In Tool. At the top, there is a 'Settings' header with a 'Help Desk' button and a back arrow. Below this is a breadcrumb trail: 'Main Menu / Main Menu'. The main heading is 'Check-In Tool Configurations'. The first section is 'Send Sign-in Link', which is described as a feature that texts and emails a sign-in link to attendees. It is noted as recommended for galas and fundraising events and is currently 'Enabled'. The second section is 'Ask for Credit Card', which prompts volunteers to ask attendees for their credit card if not saved. It is also recommended for galas and fundraising events and is currently 'Enabled'. A note at the bottom states that only verified attendees can receive a sign-in link or have a credit card added, and that the app will check the attendee's status when these options are enabled. A 'Learn More' link is provided.

**Settings** Help Desk <

[Main Menu](#) / Main Menu

### Check-In Tool Configurations

Use these settings to configure the Check-In Tool that is used to check in attendees at events.

**Send Sign-in Link**

When enabled, the app will text and email a sign-in link to the attendee when they are checked in.

*(Recommended for galas and fundraising events)*

Enabled

**Ask for Credit Card**

When enabled, the app will prompt volunteers to ask the attendee for their credit card if they don't have one saved.

*(Recommended for galas and fundraising events)*

Enabled

Note: Only attendees that are **verified** can receive a sign-in link or have a credit card added to their account. When either option are enabled, the app will check the attendee's status and help the volunteer verify the attendee. [Learn More](#)

1. From the fundraiser builder > sidebar settings, click on “fundraiser settings”, then “Check-In Tool”

2. “Send Sign-in Link” means that the Check-In Tool will automatically send a sign-in link to the attendee once they are checked in. Attendees can then click the link on their device to access your fundraiser’s webpage and make purchases on their own device.

3. “Ask for Credit Card” means that the app will prompt volunteers to save a credit card for the attendee if they do not already have one saved.

4. You can see more about how these configurations work in the Check-In Tool in Part 2 above.