CHECK IN TRAINING NOTES

Important details to include before & during your check in training

1. **SET UP CHECK IN AREA IN A CENTRALIZED AREA**
   Make it easy on your guests by having check in in an easy to find location that will catch everyone as they walk into your event.
2. **SET VOLUNTEER PERMISSIONS TO SUPERVISOR**
   Your table check in volunteers will need to create a profile on the manager portal.
3. **SEND SCANNER LINK TO SCANNER TEAM**
   You can send this link from the 'Check In' tab. This link is only needed for your volunteers who are using the scanner feature.
4. **PLACE VALUE ON FIRST IMPRESSIONS**
   Remind your volunteer team that they are greeters for your event as much as they are a check in team.
5. **CLARIFY WHAT IS REQUIRED INFORMATION**
   Determine what info is needed [email, paddle number, table assignment, &/or Credit Card] at the door.
6. **PLACE VALUE ON SPEED**
   Remind them that we want to get people into the event and enjoying themselves as quickly as possible.
7. **PLACE VALUE ON CONFIDENCE**
   Deescalate any concerns guests have by directing them to you. Guests want to be confident in your event and the tools you are using.
8. **EXPLAIN THE LAYOUT OF THE EVENT**
   Make sure your volunteers are able to direct guests to the bathroom, the bar, or other locations for your event.
9. **BE AN AMBASSADOR FOR THE CAUSE**
   Your excitement is contagious. Remember why we are here and that we are all working towards one goal
10. **HAVE AT LEAST ONE "EXPERT" IN THE CHECK IN AREA**
    If an attendee arrives that doesn't have a table number or isn't in the system, you want to have an event expert that can find a solution.

CHECK IN TABLE

Suggested [at minimum] 1 computer check in person per 100 attendees

01. **CREATE AN ACCOUNT ON MANAGER**
https://manager.event.gives/

02. **WELCOME GUEST & SEARCH NAME**
Under the 'Check In' tab, search first or last name. Search purchaser or company if no user is found.

03. **CHECK IN & VERIFY NEEDED INFO**
Your EO will clarify what info is needed [email, paddle number, table assignment, &/or Credit Card.

04. **ASSIGN THEM A PADDLE #**
Hand them the associated paddle [if not already at their table], tell them their table name, & click "check in" button.

UNIQUE SITUATIONS

ATTENDEE NAME ISN'T SHOWING UP BUT THERE IS AN EMPTY SPOT AT THEIR TABLE

Click the blue check in button

1. Search user by phone or email & create user if profile doesn't exist
2. Add name [first, last], email or phone, and/or CC and click save.
3. Locate attendee & check in normally

*** EO to clarify if there will be unassigned tickets*

ATTENDEE NAME IS BLUE & NOT BOLDED

Click the blue check in button

1. Search user by phone or email & create user if profile doesn't exist
2. Add name [first, last], email or phone, and/or CC and click save
3. Locate attendee & check in normally

ATTENDEE INFO IS ASSOCIATED WITH ANOTHER PROFILE

Click the purple merge button

1. Select a profile
2. If profile 1 has cc info, click next. If profile 1 does not have cc info and profile 2 does, click swap users. [Profile 1 should have cc info]
3. Check the desired contact info fields [only 1 email & 1 phone #]
4. Click confirm & merge

ATTENDEE IS REPLACING A GUEST WHO CAN'T MAKE IT

Search registered attendee name

1. Click three dots to the left of their name
2. Select "Re-Assign" ticket
3. Click "Re-Assign" again
4. Search new guest by phone or email & create user if profile doesn't exist
5. Add name [first, last], email or phone, and/or CC and click save
6. Locate attendee & check in normally

SCANNER TEAM

We suggest 1 scanner volunteer for every 50 attendees.

01. **OPEN SCANNER FROM TEXTED LINK**
Be sure to select "allow camera"

02. **WELCOME GUEST & ASK FOR TICKET OR NAME**
"You should have received a text with a link to your ticket." Or I can search your name for you

03. **SCAN QR AND VERIFY THEIR INFO**
Click update then update user to view their info & click save. Your EO will clarify what info is required at the door.

04. **ENTER PADDLE # & HAND THEM THEIR PADDLE**
This step is only required if you are using paddles for your event.

05. **CLICK CHECK IN & DIRECT THEM INTO THE EVENT**
They should receive a text with paddle # & table info

UNIQUE SITUATIONS

ATTENDEE WOULD LIKE TO ADD/CONFIRM THEIR CC INFO

*** EO to determine if CC info is needed at the door*

Send them to the table check in team

ATTENDEE DOES NOT HAVE A QR CODE TO SCAN

Send them to the table check in team

ATTENDEE IS REQUESTING A DIFFERENT TABLE ASSIGNMENT

*** EO will need to approve this request*

Send them to the table check in team

ATTENDEE WANTS TO SHARE A PADDLE NUMBER WITH ANOTHER GUEST

Send them to the table check in team

Volunteer Training

The Scanner Team

The Scanner Team is the first to greet guests. A good guideline to follow is **one Scanner Volunteer per 50 attendees**, but more is always better.

An hour prior to the event, add all volunteer phone numbers in the Check In tab. You should also update volunteer permission levels to supervisor in the Event Settings tab. **Scanner Volunteers need to allow access to their phone cameras.**

Scanner Flow

- Welcome guest and ask for their ticket.
  - If they do not have their ticket displayed, prompt them to check their messages.

- Once the ticket is scanned, verify the information. You can also add the guest's email.
  - Check with the EO (Event Organizer) on what information should be verified.

- Direct the guest to Table Check In if there is no Credit Card on file.

- If the guest wants to check-in someone else, direct them to Table Check In.
  - Inform guest that this person will be checked-in once they arrive.

Volunteer Training

The Table Check In Team

The Table Check In Team is a failsafe for more complex guest check in. Guests will come to Table Check In if they cannot complete their check in with the Scanner Team. Have **one computer per 100 attendees** to create the best guest experience.

An hour prior to the event, add all volunteer phone numbers in the Check In tab. You should also update volunteer permission levels to supervisor in the Event Settings tab.

Table Check In Flow

- Welcome guest and search for their ticket by first or last name.
  - If a name does not appear in search results or an unassigned ticket appears, ask the EO for help.

- Click the blue check in button. Verify the phone number, email, and Credit Card in their profile and add required information.
  - If name is **bolded and black font**, the profile is associated with a phone number or email.
  - Check with the EO on what information should be verified.
    - *If EO does not want to capture CC during check-in, we suggest sending a payment link at close of event.*

- Give the attendee their paddle and assign a paddle number if it is empty.

- Tell the attendee their table number and name.

- Click the blue check in button!
  - A green display will appear to mark a complete check in.

Volunteer Training

The Table Check In Team cont.

Table Check In: Common Scenarios

- If searching a guest's name does not yield any results, search by purchaser or company and scroll through the list.
    - The EO can give direction on when to add an attendee to an unassigned ticket
        - Add attendee, put in phone number, create user if profile doesn't already exist
        - Add name (first, last), email or phone, or credit card (don't worry about address or password) click save
        - Locate the new user/profile and follow the normal process for check in now that they have a profile/ticket (so that you can assign paddle number and/or table number)

- Click the blue check in button. Verify the phone number, email, and Credit Card in their profile and add required information.
    - If name is **bolded and black font**, the profile is associated with a phone number or email.
    - Check with the EO on what information should be verified.
        - *If EO does not want to capture CC during check-in, we suggest sending a payment link at close of event.*
- Give the attendee their paddle and assign a paddle number if it is empty.

- Tell the attendee their table number and name.

- Click the blue check in button!
    - Should display green to mark a complete check in.

Volunteer Team Training

for Check In

Check in is the front door to your event.
Nail the first impression with this volunteer training resource from Event.Gives.

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