CHECKOUT TRAINING NOTES

Important details to include before & during your checkout training

1. **PUT CHECKOUT TABLE IN A CENTRAL AREA**
   Make it easy on your guests by having checkout in an easy to find location that will catch everyone as they walk out of your event.

2. **SET VOLUNTEER PERMISSIONS TO SUPERVISOR**
   Your checkout volunteers will need to have a profile on the manager portal. You can update permissions under the 'Event Settings' tab.

3. **DESIGNATE ITEM RUNNERS & CHECK OUT TEAMS**
   Select a few volunteers to gather items and bring them to the checkout table while the check out team works with your guests.

4. **SEND PAYMENT LINK AT END OF PROGRAM**
   You want to send out the payment link once all your data is in (live auction winners & donations). Send link from the 'Event Check-In' tab.

5. **SEARCH FOR THE ITEM THEY WON**
   Search the item and verify if the item has been paid for. If item is not paid, confirm the total, fees, & card with them and then charge the card.

6. **VERIFY THEY'VE PAID & DELIVER ITEM**
   If the item shows paid, have your runners go grab the item. Once the item has been delivered, mark the item as picked up!

7. **SHOW GRATITUDE AND CONGRATULATE WINNERS**
   Be sure to thank your attendees for their generosity and congratulate the winners!

UNIQUE SITUATIONS

CASH OR CHECK PAYMENTS

Collect cash or check from the guest. Pay cart on the back end and toggle the "cart" to "offline". Enter any payment notes (check#, etc) and click "pay cart."

SPLIT PAYMENTS FOR TRIPS

Ask your **Event Organizer** to handle this request. This involves duplicating the item and lowering the price based on the guest's preference.

FAILED TRANSACTIONS

Summon your **Event Organizer** to the checkout table so they can inspect the failed transaction in Stripe.

CHECKOUT HOW-TO

Important details to include before & during your checkout training

1. **HAVE CHECKOUT TABLE IN A CENTRAL AREA**
   Make it easy on your guests by having checkout in an easy to find location that will catch everyone as they walk out of your event.

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   Your checkout volunteers will need to have a profile on the manager portal.

3. **DESIGNATE ITEM RUNNERS**
   Select a few volunteers to gather items and bring them to the checkout table.

4. **SEND PAYMENT LINK AT END OF PROGRAM**
   You can send this link from the 'Check In' tab.

5. **VERIFY ITEMS, FEES, AND PROCESS PAYMENT**
   Make sure your attendees are collecting the correct items. Also inform them about the fees they are paying.

6. **SOME ATTENDEES WILL OPT FOR MOBILE CHECKOUT**
   No need to worry - our platform is very user-friendly. With our cart system, most attendees should be successful with mobile checkout.

7. **SHOW GRATITUDE AND CONGRATULATE WINNERS**
   Be sure to thank your attendees for their generosity and congratulate the winners!

UNIQUE SITUATIONS

CASH OR CHECK PAYMENTS

- Collect cash or check

- Toggle cart off to select offline payment

- Make a payment note

FAILED TRANSACTIONS

Summon your **Event Organizer** to the checkout table so they can inspect the failed transaction in Stripe.

CHECKOUT 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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- Once the ticket is scanned, verify the information. You can also add the guest's email.
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