

Onsite Toolkit

Best practices for onsite check-in and badge printing



Onsite Toolkit

Multiple Check-in points

- Manage Check-in Locations
- Begin Check-in (Web & Mobile)
- Check-in Report

Badge Design & Printing

- Design your Badge
- Pre-print your Badge
- Print your Badge at the Event

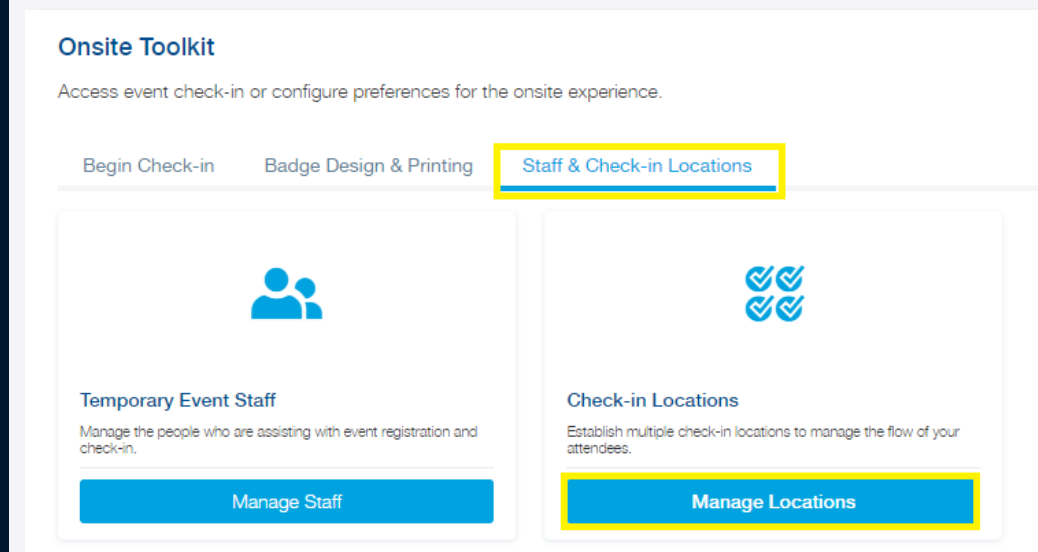
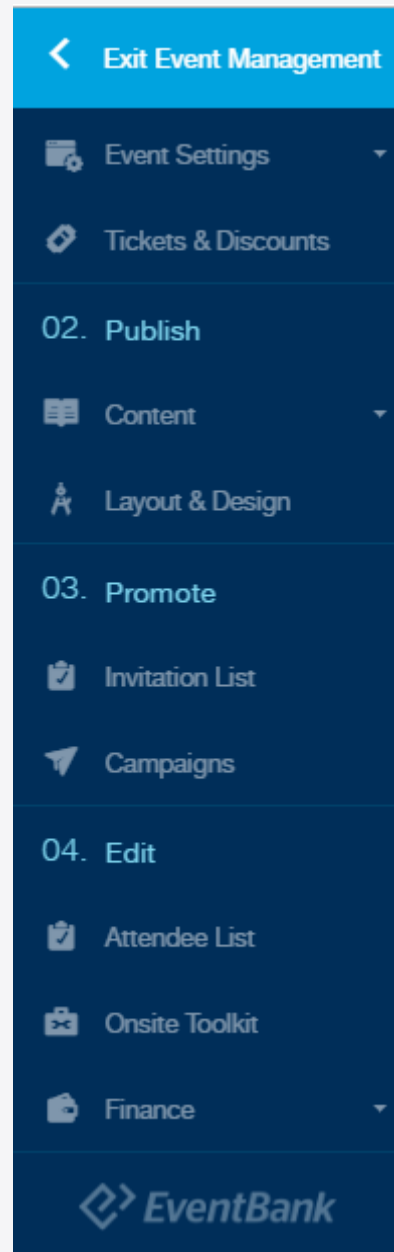
Multiple Check-in Points

Multiple Check-in Points can be used:

- Simultaneous sessions in different locations.
- Record Check-in and Check-out.

To Manage the Check-in locations:

- Enter the Event page – Onsite Toolkit
- Staff & Check-in Locations tab
- Click Manage Locations



Multiple Check-in Points



- Exit Event Management
- Event Settings
- Tickets & Discounts
- 02. Publish
- Content
 - Summary
 - Speakers
 - Agenda
 - Venue
 - Sponsors & Partners
 - Exhibitors
 - Documents
 - Layout & Design

When hosting large events, create multiple check-in points to manage the flow of your attendees.

Primary Check-in Location	Capacity
Default	N/A

Other Locations

+ Add Check-In Location

+ Add Locations for All Sessions

+ Add Locations for All Tracks

Day 1 (May 28, 2019)

Drag one of the session types in your agenda to start building your schedule!

Session	Starting Time	Duration	Track
Session A	16:00	16:00 - 17:30	Session A - 1
Session B	16:00	16:00 - 17:30	Session B - 1
Session A	17:30	17:30 - 18:45	Session A - 2
Session B	17:30	17:30 - 18:45	Session B - 2

Customize your agenda

Create custom check-in points across your event's tracks

- Add the Check-in Location, there are three options

1. +Add Check-in Location (One at a time)
2. +Add Locations for All Sessions
3. +Add Locations for All Tracks

*Add Locations for All Session and for All Tracks options are only available, after the multiple sessions or tracks agenda is created.

Content - Agenda

Multiple Check-in Points

When adding the Check-in Location, below options are available:

- **Require Primary Check-in:** This option will only allow your attendees to check-in via additional check-in points AFTER check-in from the Primary Check-in location.
- **Select the Track or Session:** This option will let you bind this location with available Track or Session created via Agenda section. This can be used when you check-in the attendee at the session entrance.
- **Select Ticket Type:** This option will only allows the attendees with the specific ticket type to be checked in.

Add Check-in Location ✕

Location Name *

Description

Capacity (optional)

Require Primary Check-in ?

Choose a color *:

● ● ● ● ● ● ●

Bind to Track or Session (optional)

Select Track or Session ▾

Restrict check-in access to specific Ticket Types (optional)

Select Ticket Type ▾

Cancel Add

Multiple Check-in Points

Manage the Check-in Locations

- After creating the check-in locations, you can edit, delete or re-organize the location list's order. To change the order, please use the drag and drop icon which is located at the left hand side of the location name.

When hosting large events, create multiple check-in points to manage the flow of your attendees.


[+ Add Check-In Location](#)

	Primary Check-in Location	Capacity		
	Default	N/A		
Other Locations				
⌵	● Session A-1	Capacity N/A	Primary Check-In Required	⋮
⌵	● Session A-2	Capacity N/A	Primary Check-In Required	Edit Delete
⌵	● Session B-1	Capacity N/A	Primary Check-In Not Required	⋮
⌵	● Session B-2	Capacity 50	Primary Check-In Required	⋮

Multiple Check-in Points

← Exit Event Management

- Event Settings
- Tickets & Discounts
- 02. Publish
 - Content
 - Layout & Design
- 03. Promote
 - Invitation List
 - Campaigns
- 04. Edit
 - Attendee List
 - Onsite Toolkit
 - Finance




How to Check-in? (Web)

- Enter the Event page – Onsite Toolkit – In the Begin Check-in tab, Click the Enter Standard Check-In button. This will redirect you to the Check-in page.
- *Notably, check-in function is only available 48 hours before the event start time. And Check-in function is closed 7 days after the event end date.

Onsite Toolkit


Access event check-in or configure preferences for the onsite experience.

[Begin Check-in](#) [Badge Design & Printing](#) [Staff & Check-in Locations](#)




Standard Check-in
Begin checking in attendees with the standard check-in module.

[Enter Standard Check-In](#)



Self Check-in Kiosk
Let attendees check in on their own with a full-screen kiosk.

[Enter Check-In Kiosk](#)



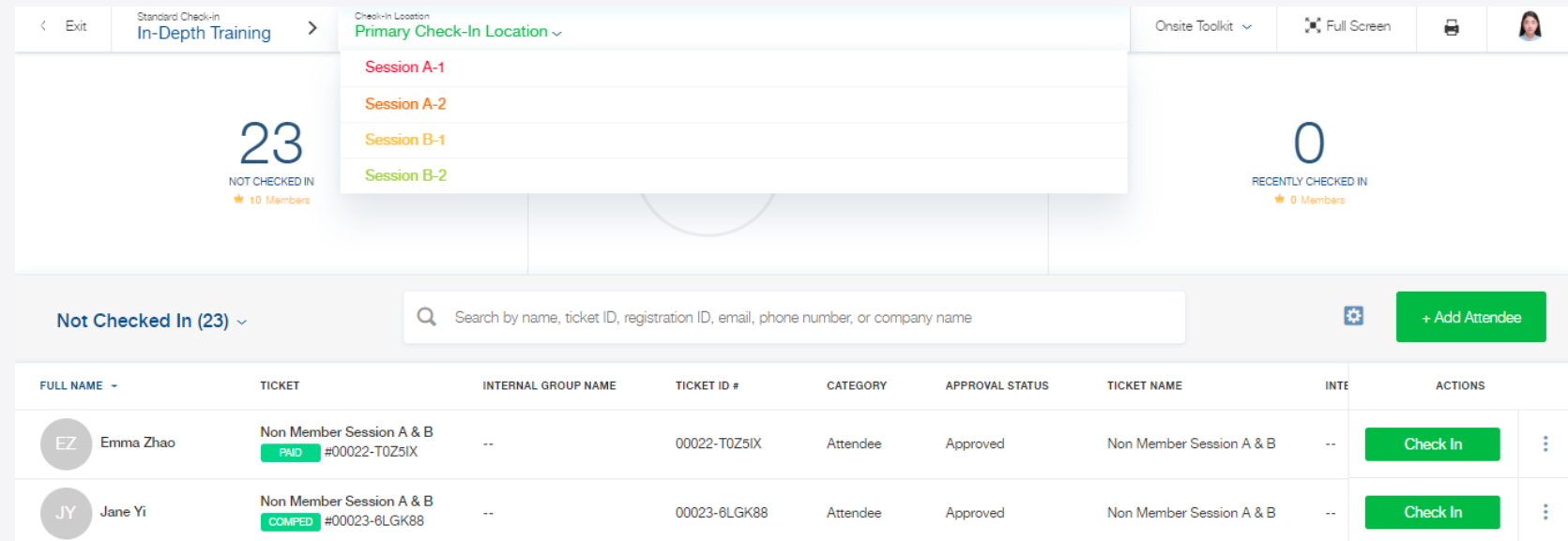
EventBank Manager App
Check in attendees and get event information on your mobile device.

[Download EventBank Manager](#)



Multiple Check-in Points

Check-in workflow

- Make sure to select the correct check-in location.
- Search the attendee by the name, ticket ID, registration ID, email address, phone number or company name. * This information will only be available when the attendee's registration has the respective data.
- Click Check-In button at the end of the row.



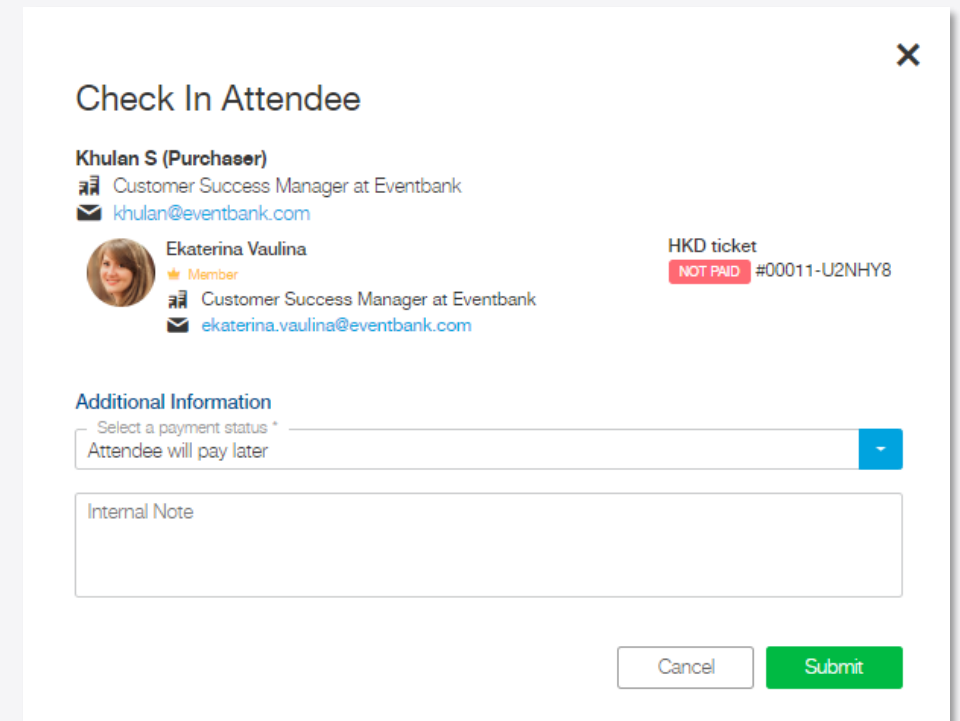
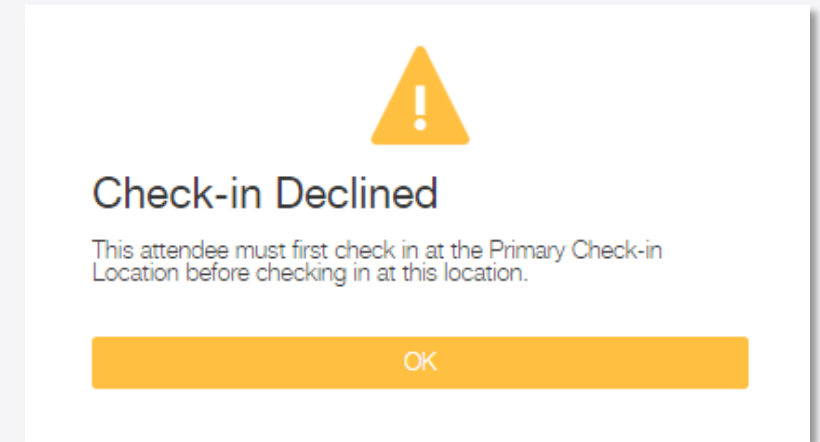
The screenshot displays the EventBank check-in interface. At the top, there is a navigation bar with 'Exit', 'Standard Check-in In-Depth Training', and 'Check-in Location Primary Check-In Location'. A dropdown menu is open, listing 'Session A-1', 'Session A-2', 'Session B-1', and 'Session B-2'. Below the navigation bar, there are two summary cards: '23 NOT CHECKED IN 10 Members' and '0 RECENTLY CHECKED IN 0 Members'. A search bar is located below the cards, with the text 'Search by name, ticket ID, registration ID, email, phone number, or company name'. To the right of the search bar is a '+ Add Attendee' button. Below the search bar is a table with the following columns: FULL NAME, TICKET, INTERNAL GROUP NAME, TICKET ID #, CATEGORY, APPROVAL STATUS, TICKET NAME, INT, and ACTIONS. The table contains two rows of attendee data.

FULL NAME	TICKET	INTERNAL GROUP NAME	TICKET ID #	CATEGORY	APPROVAL STATUS	TICKET NAME	INT	ACTIONS
 Emma Zhao	Non Member Session A & B PAID #00022-T0Z5IX	--	00022-T0Z5IX	Attendee	Approved	Non Member Session A & B	--	Check In
 Jane Yi	Non Member Session A & B COMPED #00023-6LGK88	--	00023-6LGK88	Attendee	Approved	Non Member Session A & B	--	Check In

Multiple Check-in Points

Check-in notifications

- **Check-in Declined:** This notification appears when you check-in the attendee via additional check-in location, and the attendee has not check-in from the Primary Check-in Location. *Notably, you will not have this notification, if “Require Primary Check-in” option is not enabled from the respective check-in location.
- **Unpaid Attendee:** This notification appears when you check-in the attendee, and the attendee hasn’t completed the payment. Regardless of the payment status, you are still able to check-in this attendee, and update the payment status from the “Select a payment status” drop-down menu.

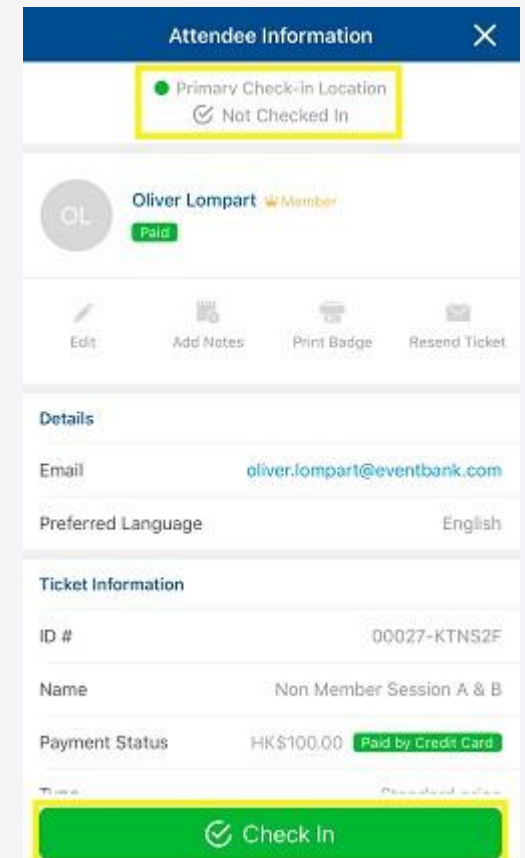
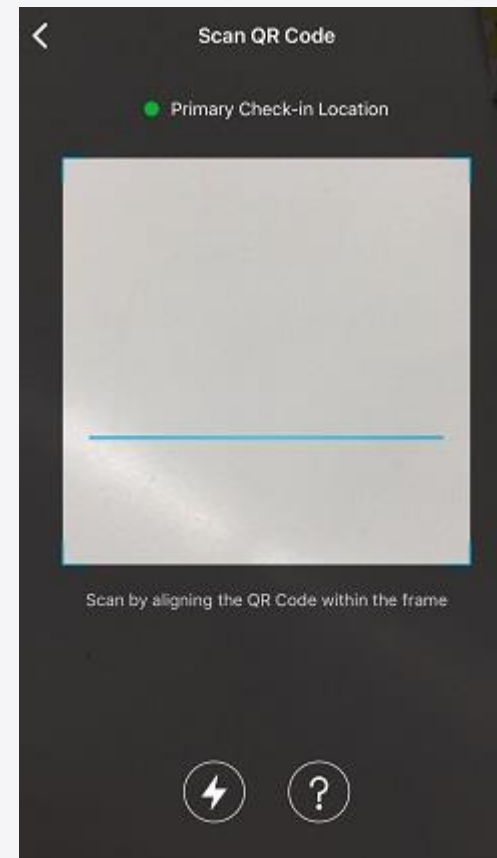
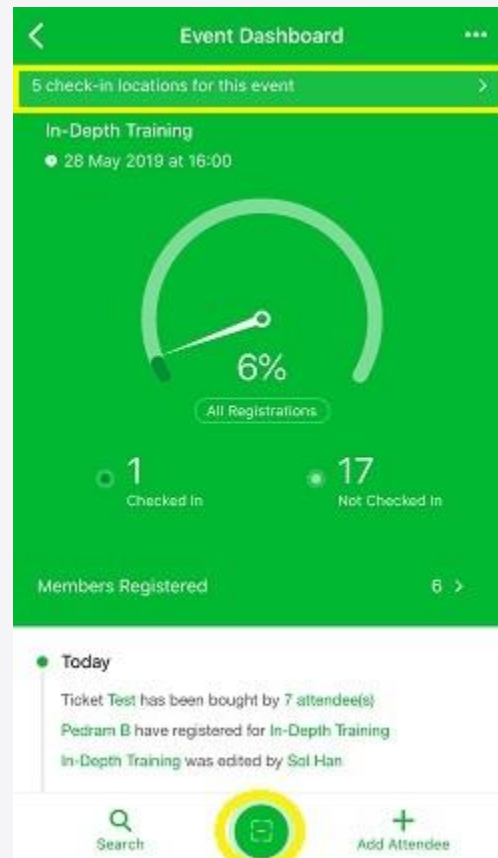
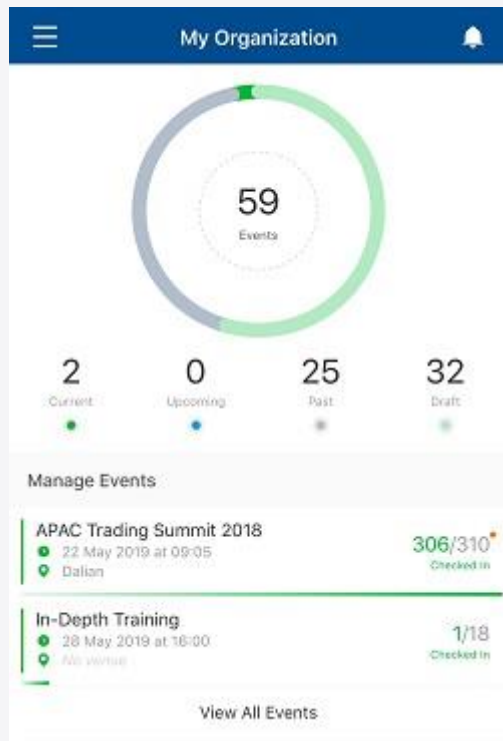


Multiple Check-in Points



Mobile QR code Check-in

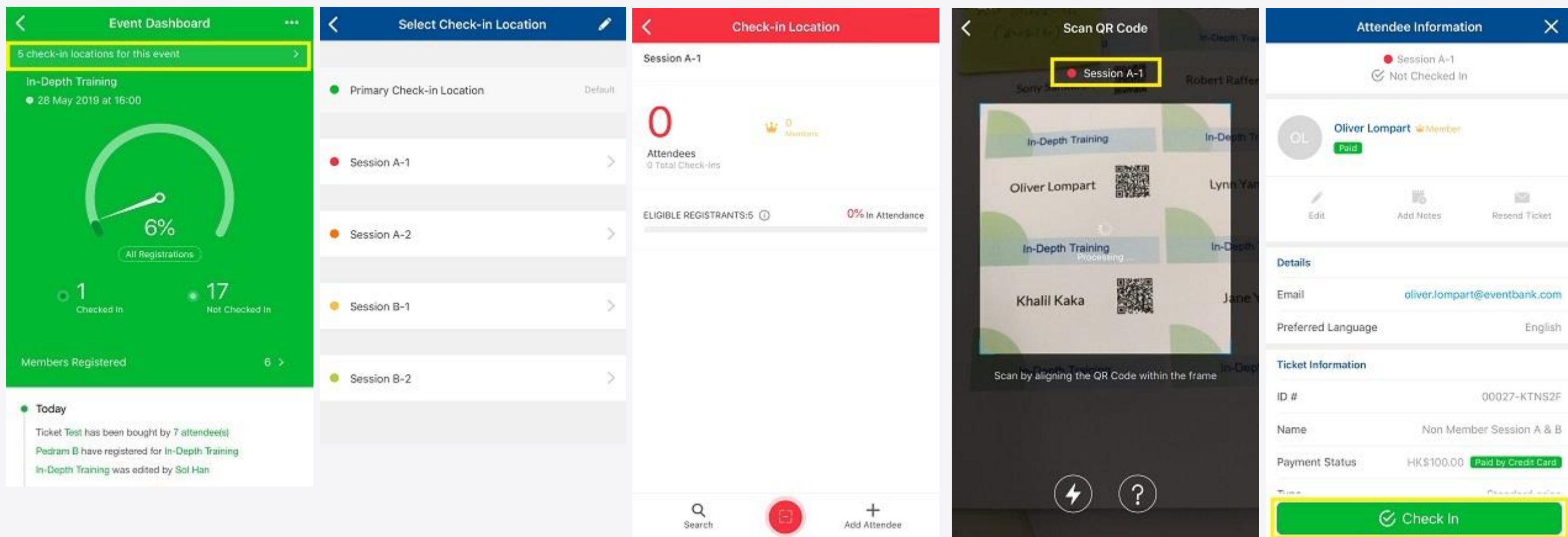
- Download the EventBank Manager app to begin, which is available via Google Play Store, Apple App Store, and Wandoujia. Log-in with the exact same email address and password that you use to log-in via EventBank Web platform. After log-in, you will see your organization's dashboard, select the current event, in the current event page, tab the QR code scanner icon at the bottom of the screen. Scan the QR code of the attendee, review the attendee's profile and tab "Check-in" to complete the process.



Multiple Check-in Points

Mobile QR code Additional Check-in

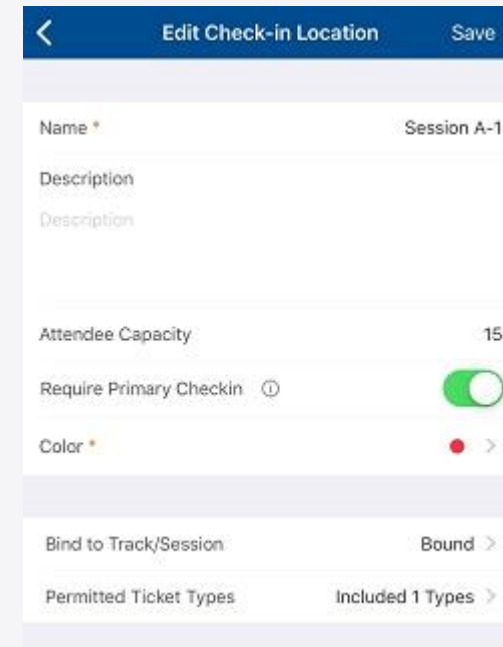
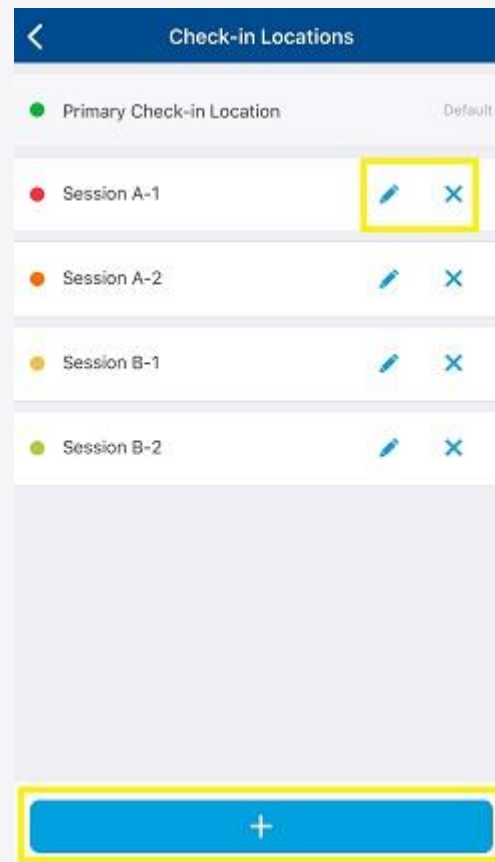
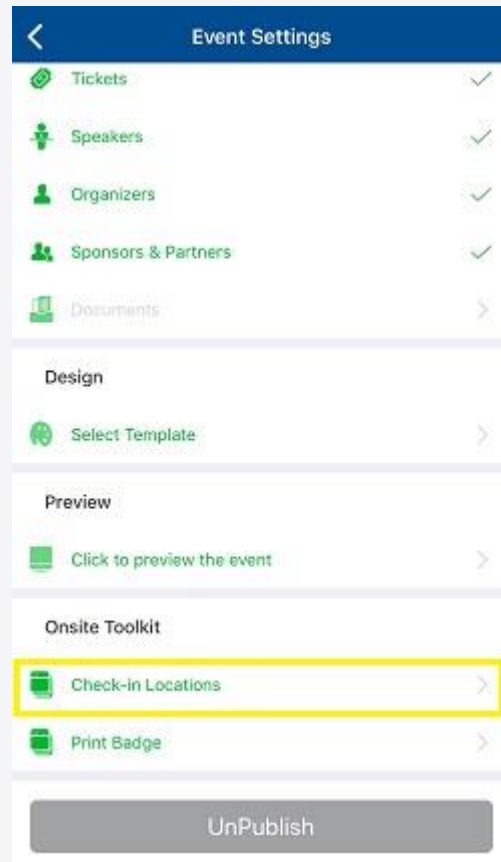
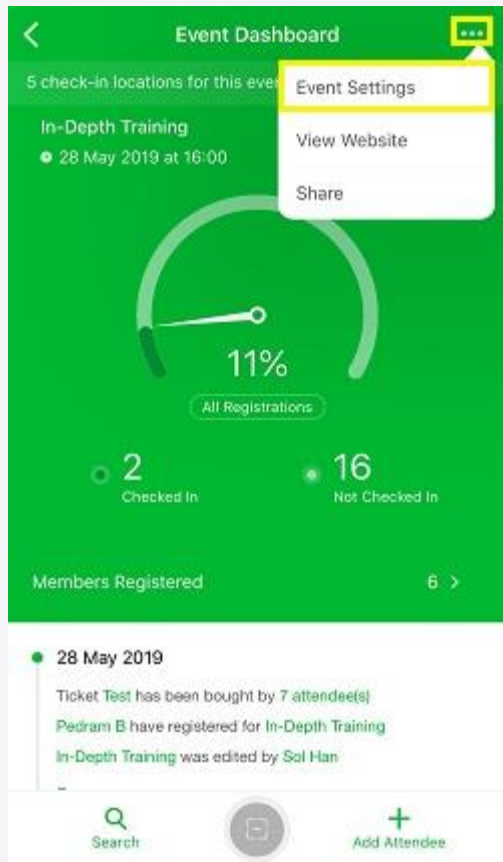
- In the Event Dashboard page, please tab “{n}check-in locations for this event” to select the respective check-in location. After selecting the check-in location, please tab the QR code scanner icon at the bottom of the screen and scan the attendee’s QR code. After scan the QR code, review the attendee’s information and tab the Check-in to complete the process.



Multiple Check-in Points

Manage Check-in Location (Mobile)

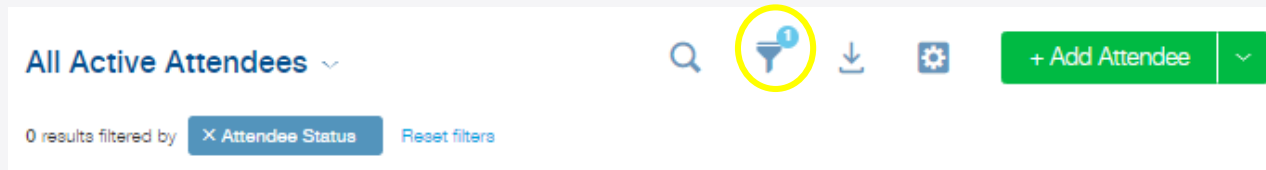
- In the Event Dashboard, please tap 3 dots icon, and select Event Settings. In the Event Settings' screen, please tap the Check-in Locations. In the Check-in Locations list, you will be able to edit, delete or add a new check-in location.



Multiple Check-in Points

Post Event Report

- To export the check-in status, please go to Event page – Attendee List and click the Export icon.
- When exporting the attendee list, please make sure you're including the Check-In Information.



The screenshot shows the 'All Active Attendees' section of the EventBank interface. It includes a search icon, a filter icon (highlighted with a yellow circle), a download icon, a settings icon, and a '+ Add Attendee' button. Below the icons, it indicates '0 results filtered by Attendee Status' with a 'Reset filters' link.

Export List

Select the fields you want to include in the exported list:
Select one or more fields *:

Attendee Information (2)

First Name 

Last Name 

Check-in Information (4)


Primary Location Check-in Status 


Other Check-in Locations 

Primary Location Check-in Staff 

Primary Location Check-in Time 

Registration Information (1)

Registration Date 

Select one or more fields 

Merge answers for multiple choice fields

Select a time zone for any time-related fields

Time zone

GMT +08:00 (Hong Kong) 

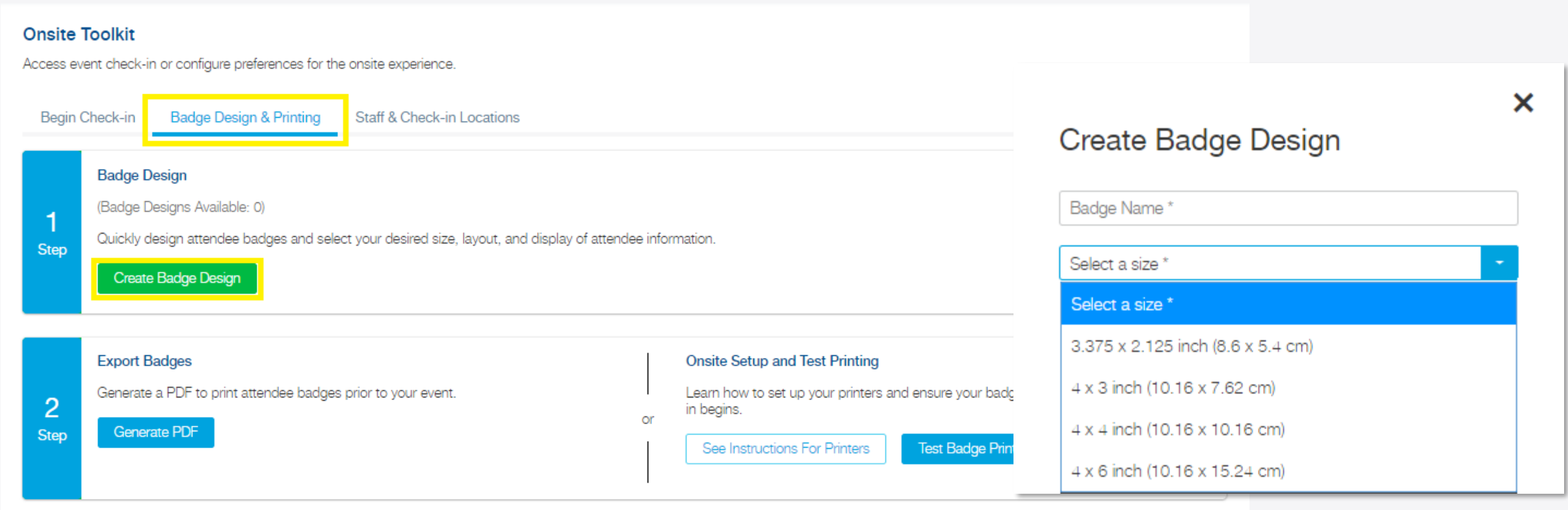
Cancel

Export

Badge Design & Printing

How to create a badge design?

- To create the badge design, please go to Onsite Toolkit - Badge Design & Printing tab, and click the Create Badge Design button to begin. Please select the respective size for your badge.
- Note: For the onsite badge print, the recommended size for each printer is 3.375 x 2.125 – Brother QL-820NWB (QL-720NW) | 4 x3, 4x4, 4x6 – Zebra GX430t



Onsite Toolkit
Access event check-in or configure preferences for the onsite experience.

Begin Check-in **Badge Design & Printing** Staff & Check-in Locations

1 Step
Badge Design
(Badge Designs Available: 0)
Quickly design attendee badges and select your desired size, layout, and display of attendee information.
[Create Badge Design](#)

2 Step
Export Badges
Generate a PDF to print attendee badges prior to your event.
[Generate PDF](#)

Onsite Setup and Test Printing
Learn how to set up your printers and ensure your badge in begins.
[See Instructions For Printers](#) [Test Badge Print](#)

Create Badge Design

Badge Name *

Select a size *

- 3.375 x 2.125 inch (8.6 x 5.4 cm)
- 4 x 3 inch (10.16 x 7.62 cm)
- 4 x 4 inch (10.16 x 10.16 cm)
- 4 x 6 inch (10.16 x 15.24 cm)

Badge Design & Printing

Badge Design Editor V2's updated item:

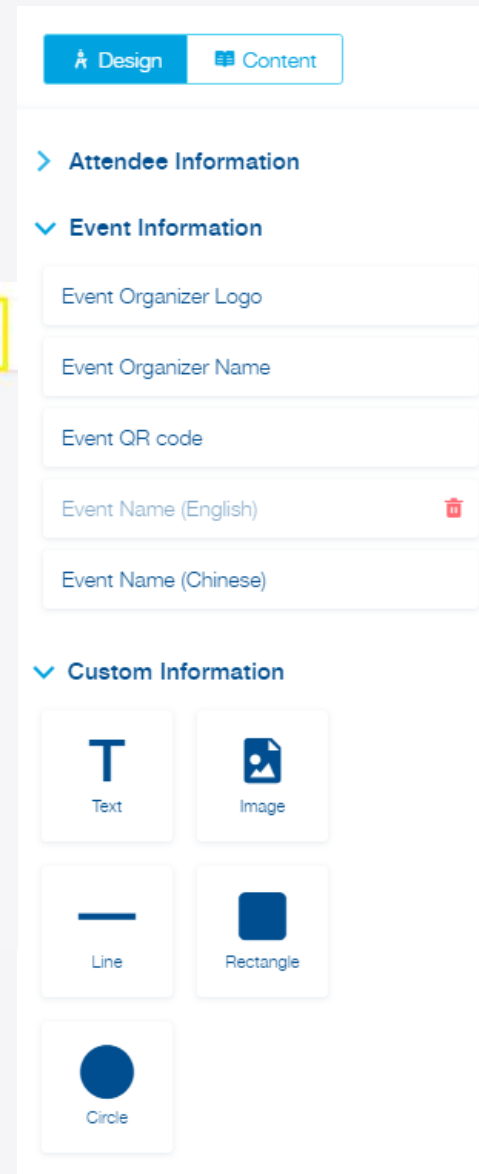
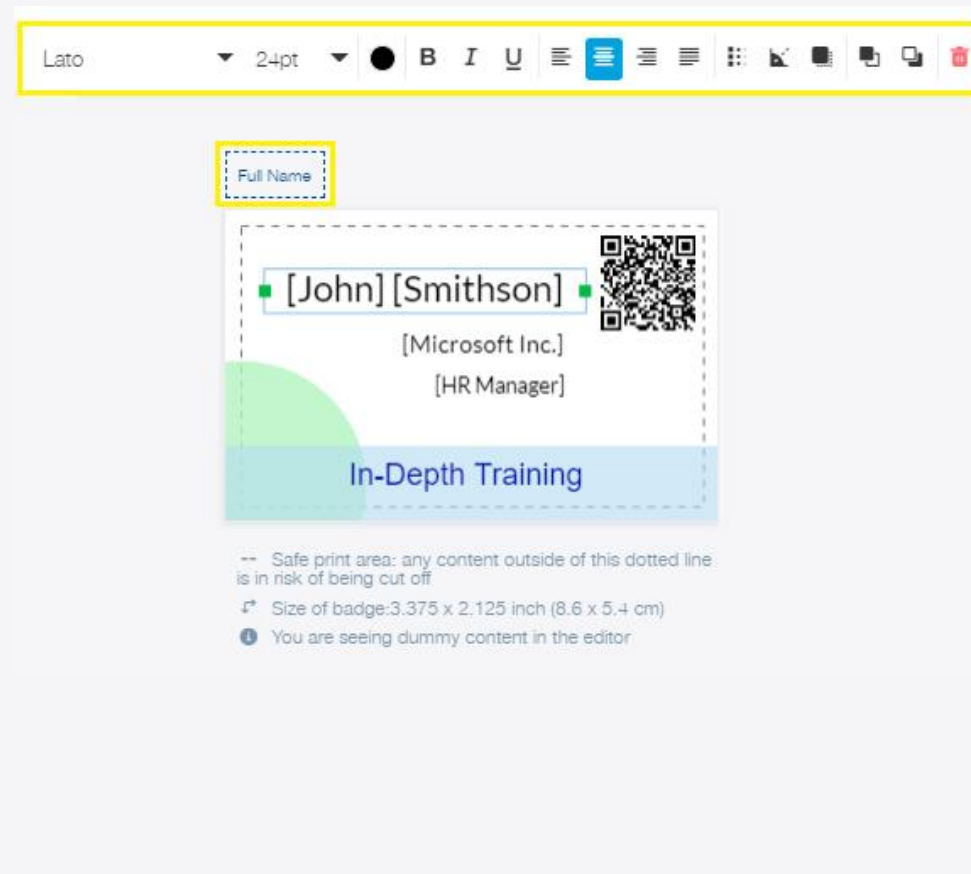
Information list

- Attendee Information: Registration form's fields are supported. Including the Single & Multiple choice options
- Event Information: Event QR code.
- Custom Information: Text, Image, Line, Rectangle and Circle.

Additional design options

Font style, size, color, Bold, Italic, Underline, Transparency, Rotation, Shadow, Send forward and backward is now available.

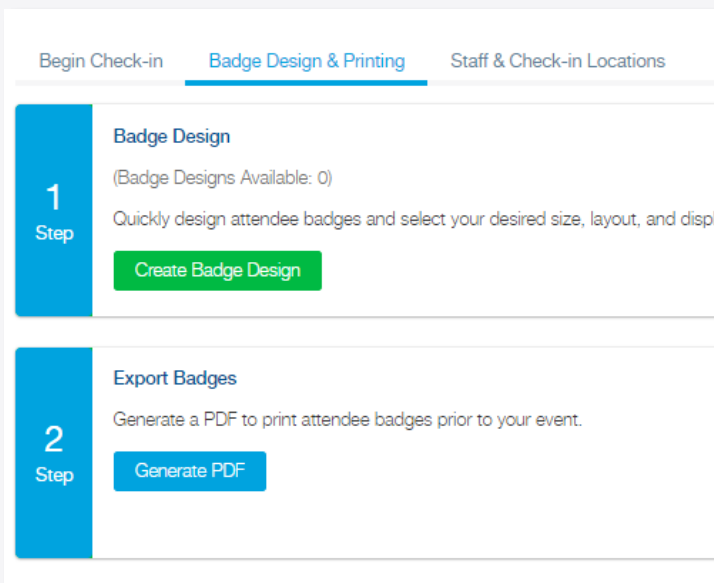
Most importantly, you can move around the each item and place it wherever you want.



Badge Design & Printing

Pre-print the badges.

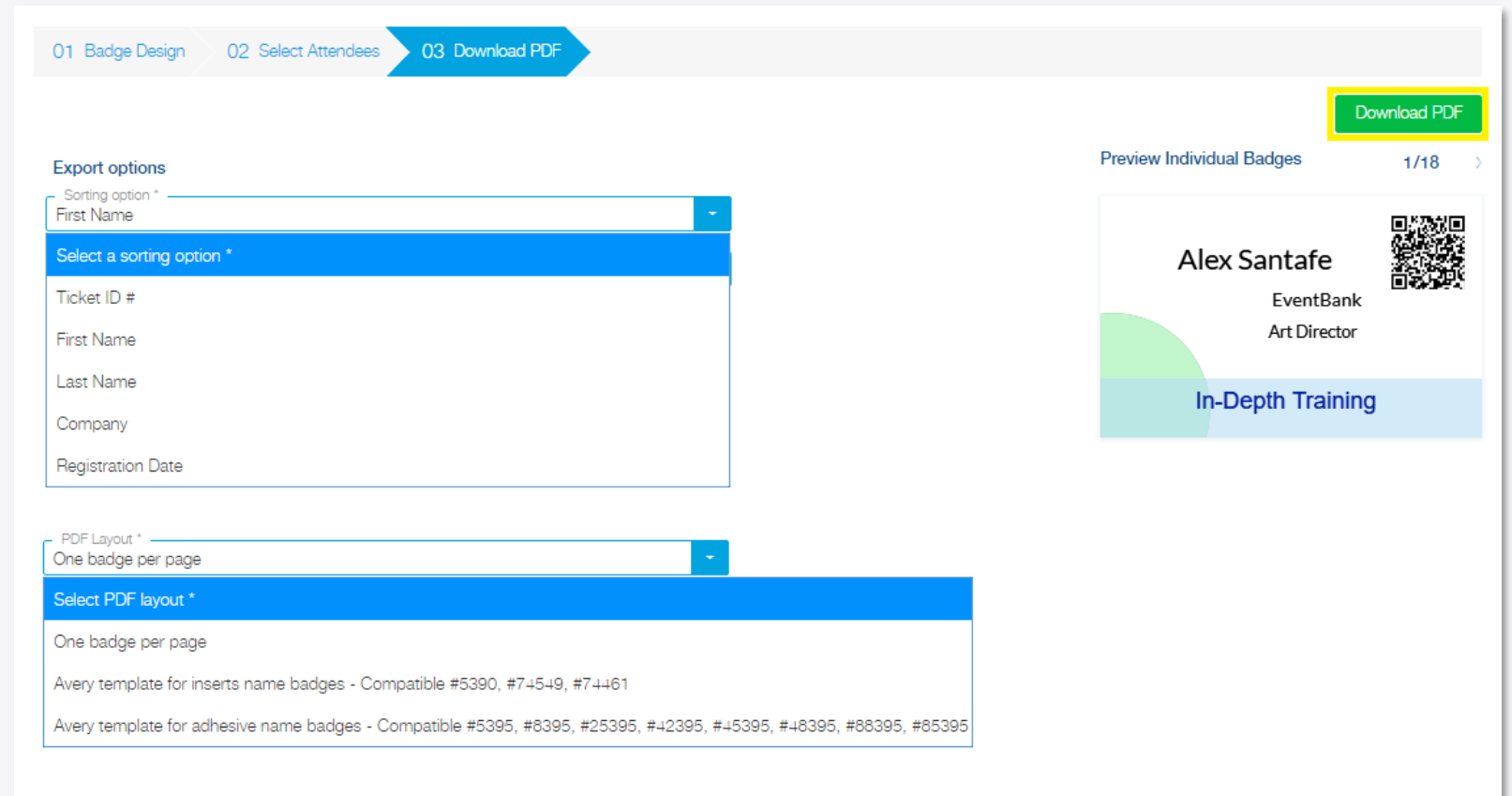
- After creating the badge design, enter Badge Design & Printing, and click the Generate PDF button. When pre-printing the badge, you will be able to use the normal printer and print it in color.



Begin Check-in | **Badge Design & Printing** | Staff & Check-in Locations

1 Step **Badge Design**
(Badge Designs Available: 0)
Quickly design attendee badges and select your desired size, layout, and display options.
[Create Badge Design](#)

2 Step **Export Badges**
Generate a PDF to print attendee badges prior to your event.
[Generate PDF](#)



01 Badge Design | 02 Select Attendees | **03 Download PDF**

[Download PDF](#)

Preview Individual Badges 1/18 >

Export options

Sorting option *
First Name

Select a sorting option *


Ticket ID #
First Name
Last Name
Company
Registration Date

PDF Layout *
One badge per page

Select PDF layout *

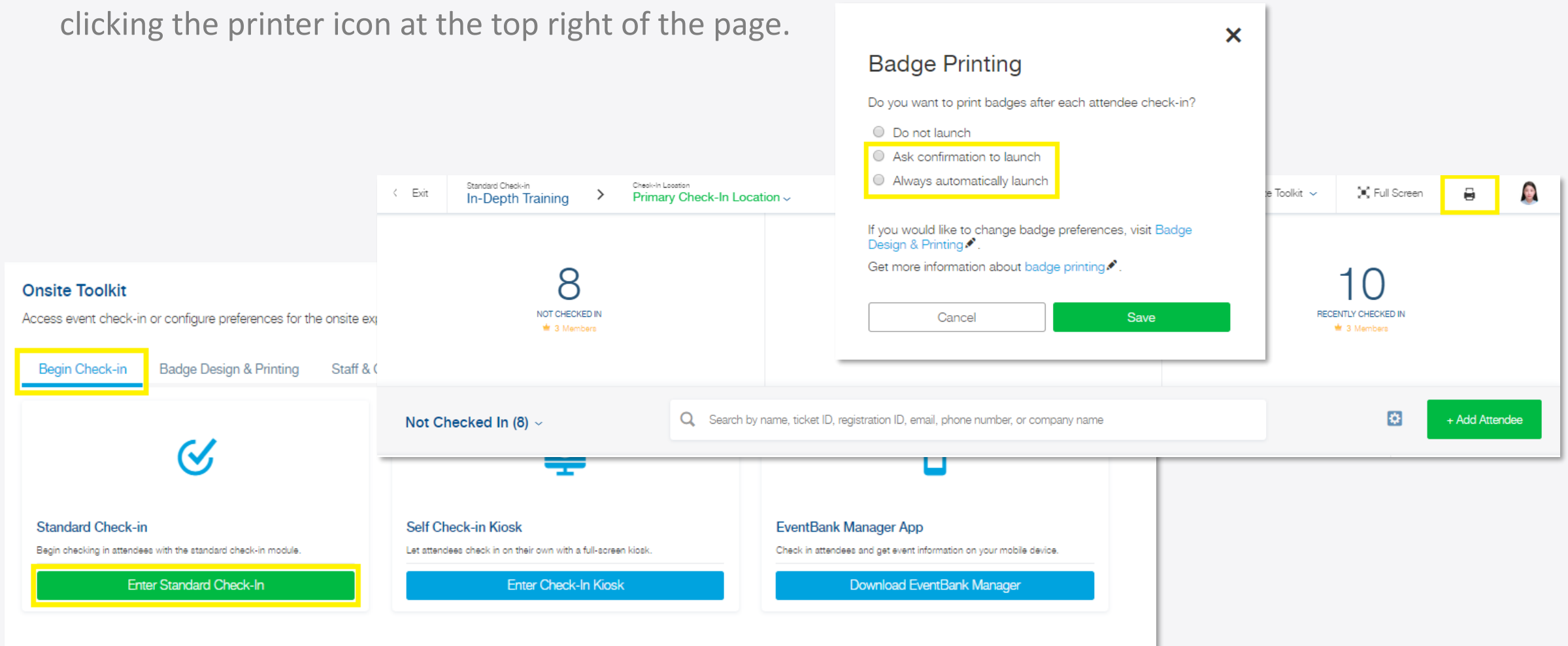
One badge per page
Avery template for inserts name badges - Compatible #5390, #74549, #74461
Avery template for adhesive name badges - Compatible #5395, #8395, #25395, #42395, #45395, #48395, #88395, #85395

Alex Santafe
EventBank
Art Director
In-Depth Training



Badge Design & Printing

To print the badges onsite, please make sure you're connected with the printer, and enter the Check-in page to begin. In the Check-in page, please configure the badge printing workflow by clicking the printer icon at the top right of the page.

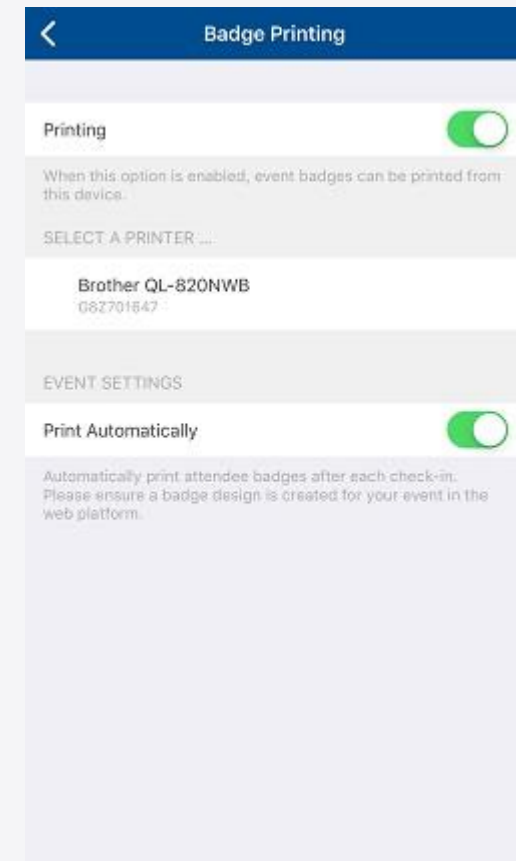
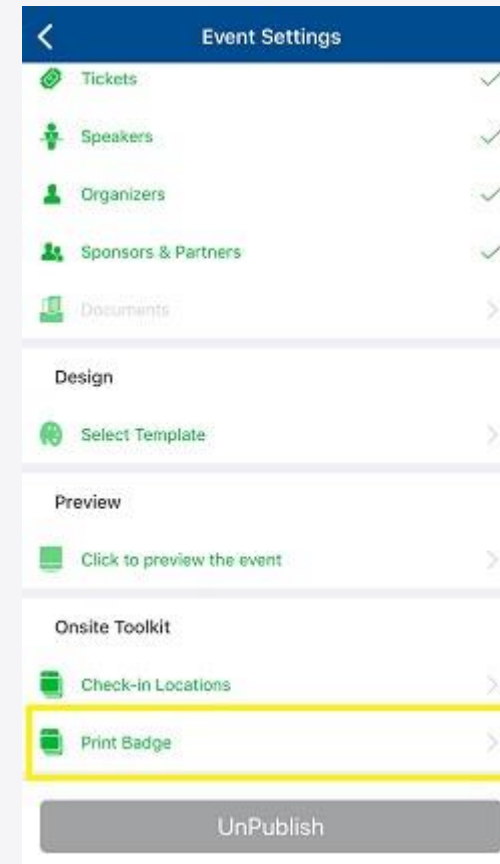


The screenshot displays the EventBank Onsite Toolkit interface. The main header shows "Standard Check-in In-Depth Training" and "Check-in Location Primary Check-In Location". The central area displays "8 NOT CHECKED IN" and "3 Members". A modal window titled "Badge Printing" is open, asking "Do you want to print badges after each attendee check-in?". The modal has three radio button options: "Do not launch", "Ask confirmation to launch" (highlighted with a yellow box), and "Always automatically launch". Below the modal, there are buttons for "Cancel" and "Save". The bottom section of the interface shows three check-in options: "Standard Check-in" (with a green button "Enter Standard Check-In" highlighted in yellow), "Self Check-in Kiosk" (with a blue button "Enter Check-In Kiosk"), and "EventBank Manager App" (with a blue button "Download EventBank Manager"). A search bar and a "+ Add Attendee" button are also visible.

Badge Design & Printing

To print the badges onsite via mobile app. Below Item is required:

- Brother QL-820NWB (QL-720NW), and the paper size: 62”.
- Make sure your printer and mobile devices are connected with the same Wifi.



Tips



Walk-in Registration- Search the attendee via CRM

When you add the attendees onsite, you're able to add the attendees by searching the CRM both web and mobile. This will help you to verify whether the walk-in registration attendee is a member or not.

Add Attendee

Search for a contact in the CRM

Or add a new attendee manually

Please complete the below form to register, in order to access to this webinar session:

<input type="text" value="First Name *"/>	<input type="text" value="Last Name *"/>
<input type="text" value="Email *"/>	<input type="text" value="Company"/>
<input type="text" value="Country/Region"/>	

We want to hear from you! Any questions you would like us to cover today during the webinar? (If you have no specific ones, please complete with "n/a")

The image shows a mobile application interface. On the left is the 'Event Dashboard' for 'In-Depth Training' on May 28, 2019. It features a progress gauge showing 6% completion, with 1 checked-in and 17 not checked-in attendees. Below the gauge, it lists 'Members Registered' as 6. A notification at the bottom states: 'Ticket Test has been bought by 7 attendee(s). Pedram B have registered for In-Depth Training. In-Depth Training was edited by Sol Han.' On the right is the 'New Attendee' screen, which has a search bar containing 'Sol'. Below the search bar is a list of search results for 'Sol Han', including roles like 'Speaker' and 'Member'. A keyboard is visible at the bottom of the screen.

Thank You

