Onsite Toolkit

Best practices for onsite check-in and badge printing

EventBank

Onsite Toolkit

EventBank

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

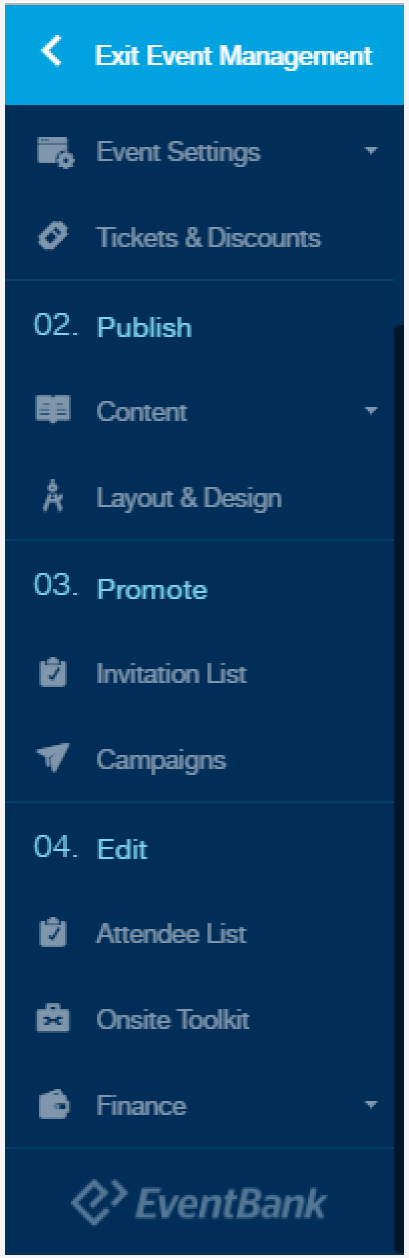
Multiple Check-in Points

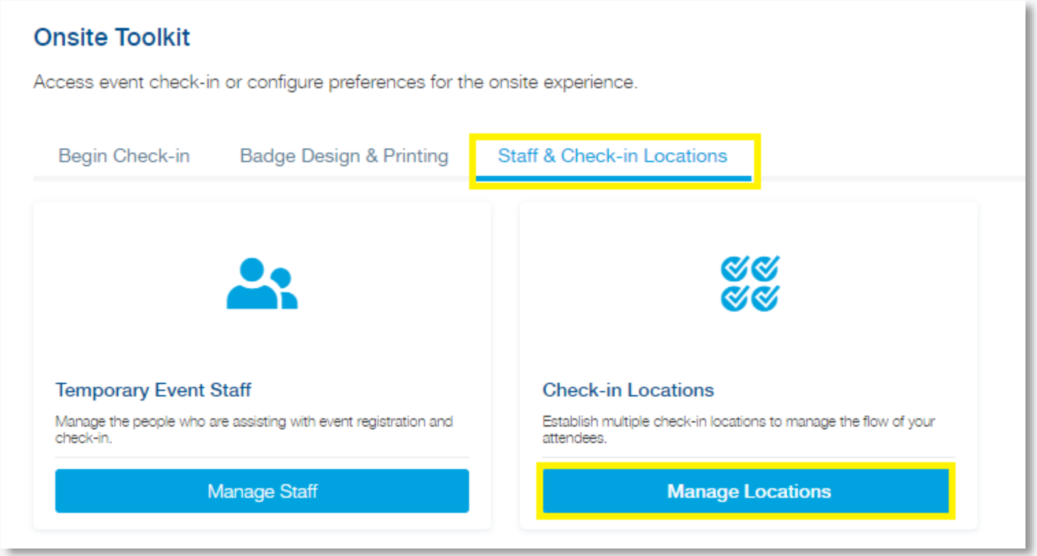
Multiple Check-in Points can be used:

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

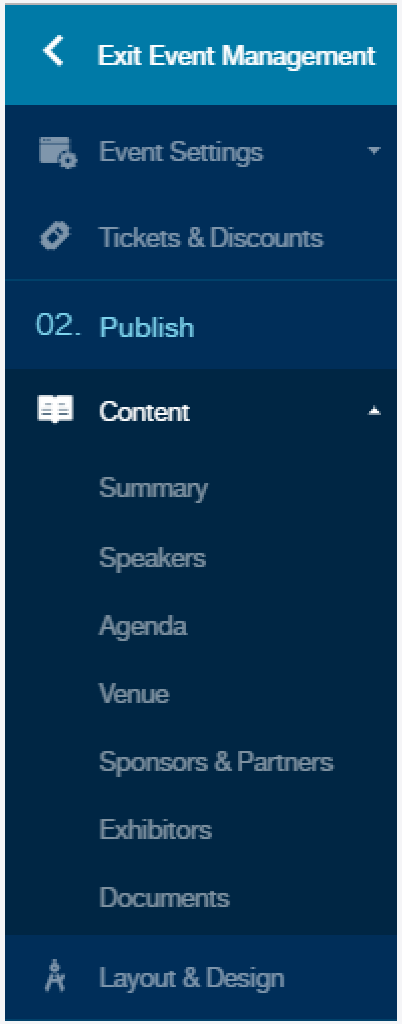
To Manage the Check-in locations:

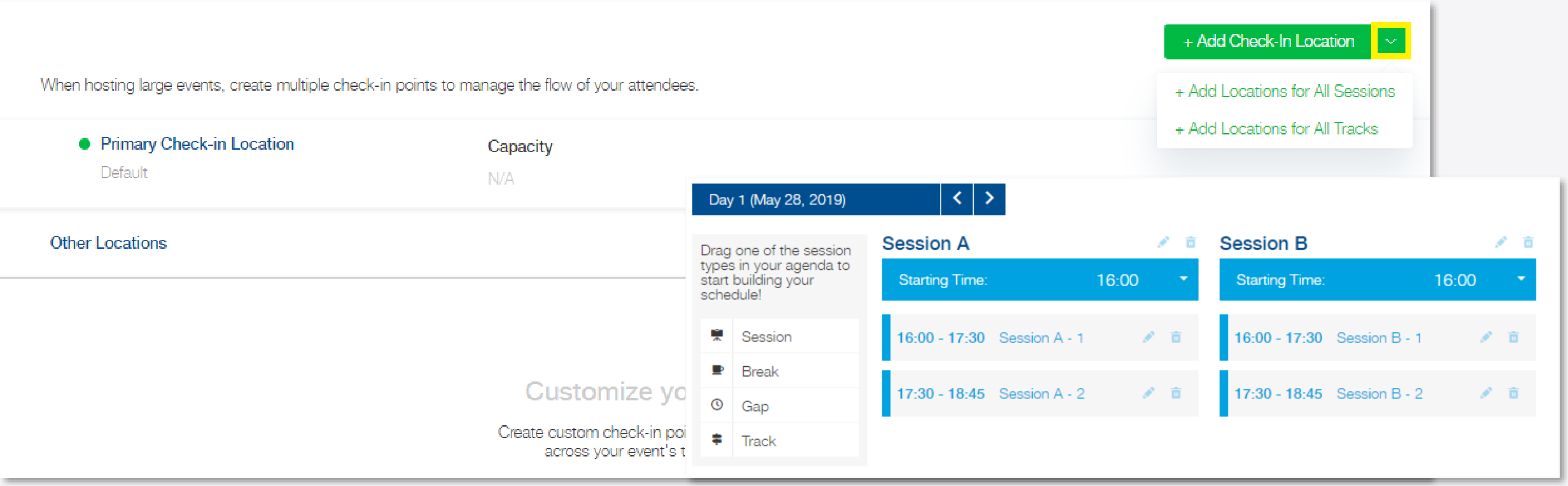
- Enter the Event page – Onsite Toolkit
- Staff & Check-in Locations tab
- Click Manage Locations





Multiple Check-in Points





- 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

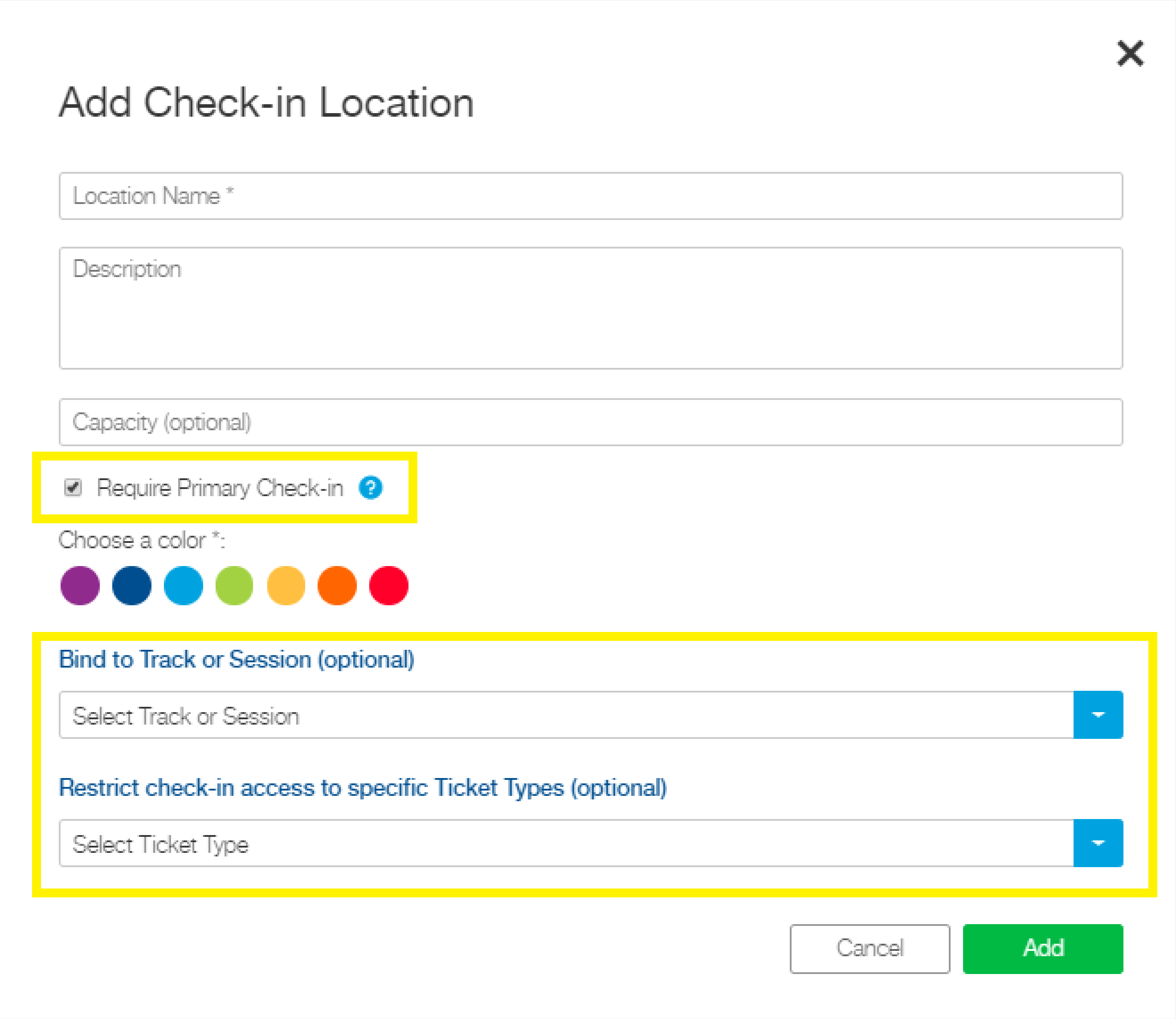
  *Add Locations for All Session and for All Tracks options are only available, after the multiple sessions or tracks agenda is created. Content - Agenda

Multiple Check-in Points

EventBank

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

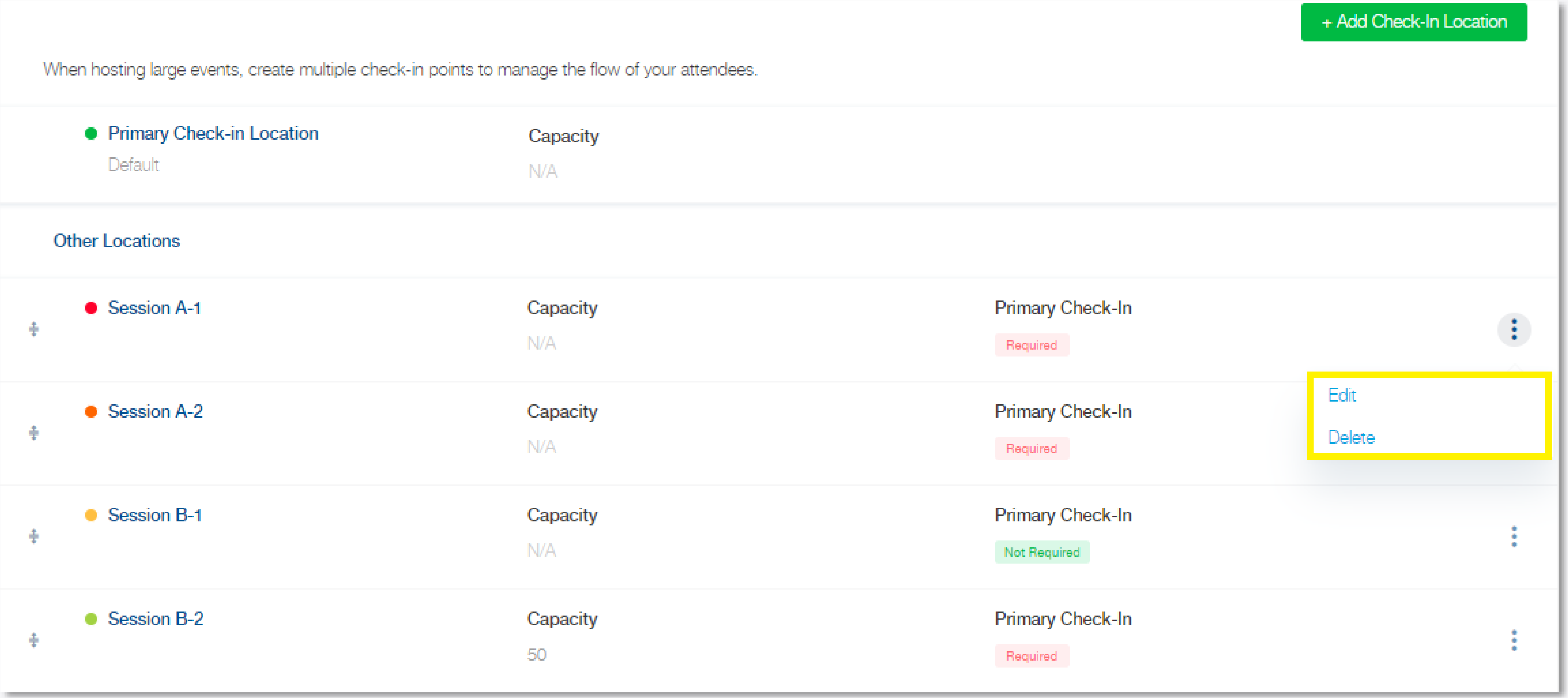
- Require Primary Check-in: This option will only allow your attendees to check-in via additional check-in points AFTER check-in from the Primary Check-in location.
- Select the Track or Session: This option will let you bind this location with available Track or Session created via Agenda section. This 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.



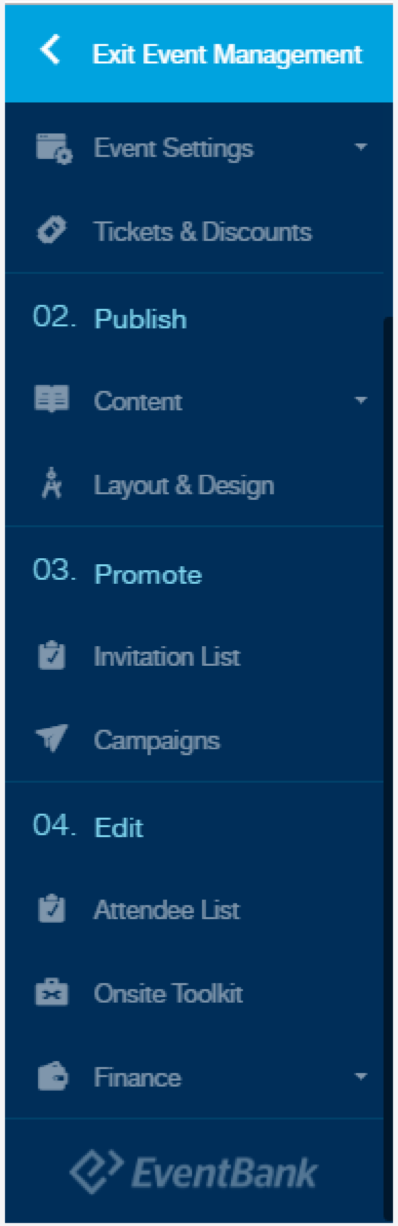
Multiple Check-in Points

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.

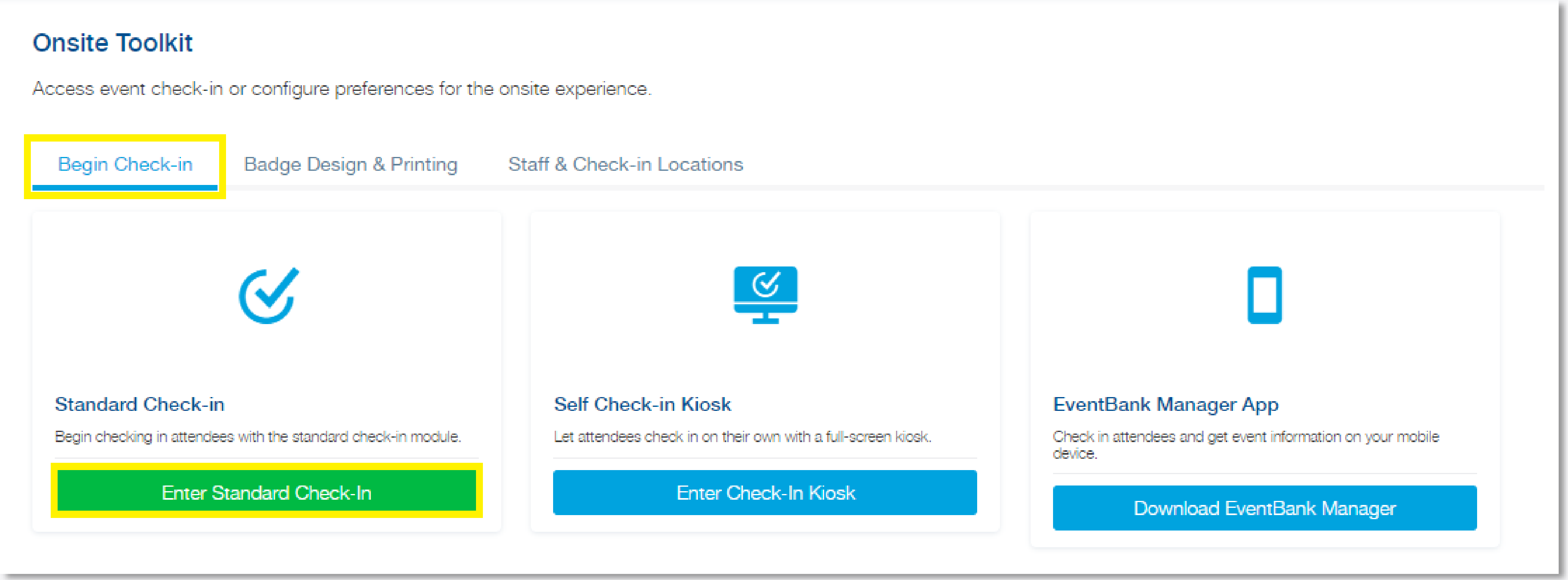


Multiple Check-in Points



How to Check-in? (Web)

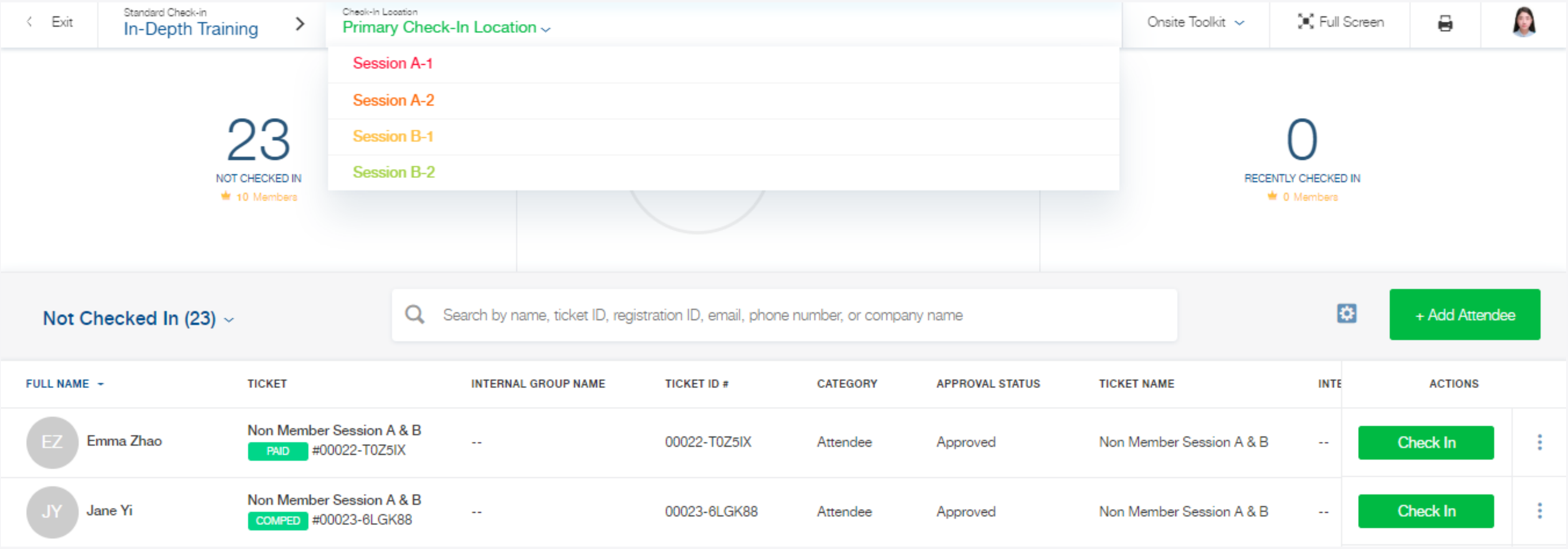
- Enter the Event page – Onsite Toolkit – In the Begin Check-in tab, Click the Enter Standard Check-In button. This will redirect you to the Check-in page.
- *Notably, check-in function is only available 48 hours before the event start time. And Check-in function is closed 7 days after the event end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



Multiple Check-in Points

Check-in workflow

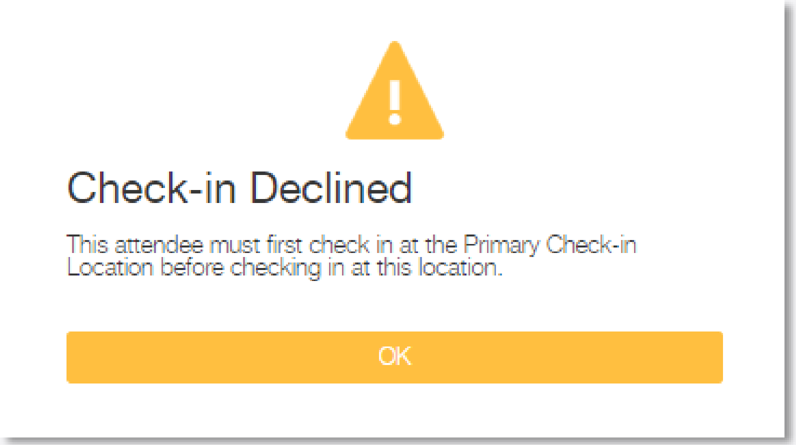
- Make sure to select the correct check-in location.
- Search the attendee by the name, ticket ID, registration ID, email address, phone number or company name. * This information will only be available when the attendee's registration has the respective data.
- Click Check-In button at the end of the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

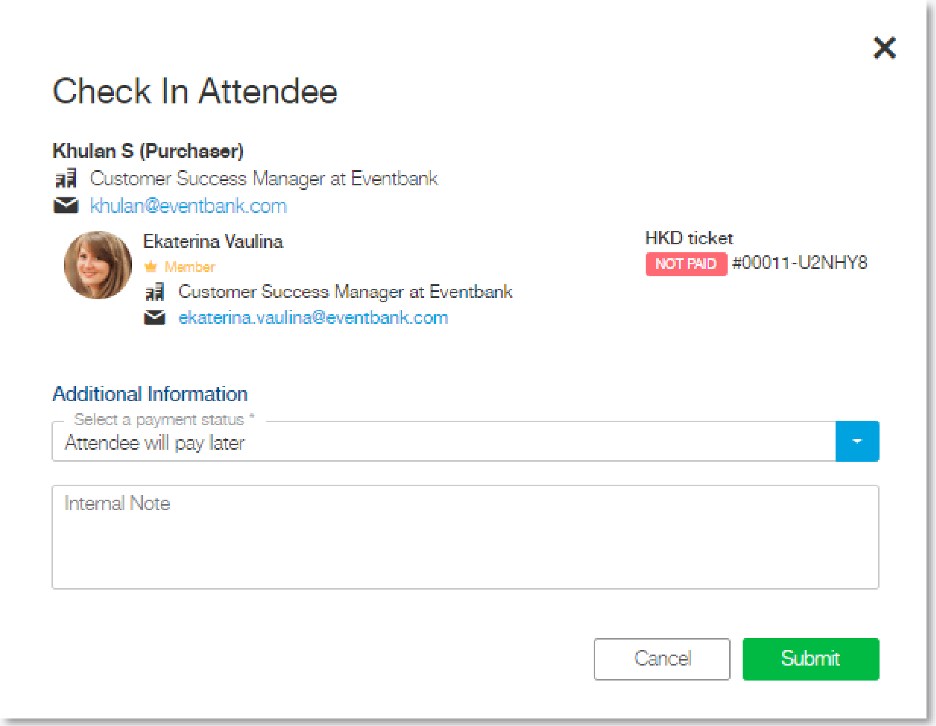


Multiple Check-in Points

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.

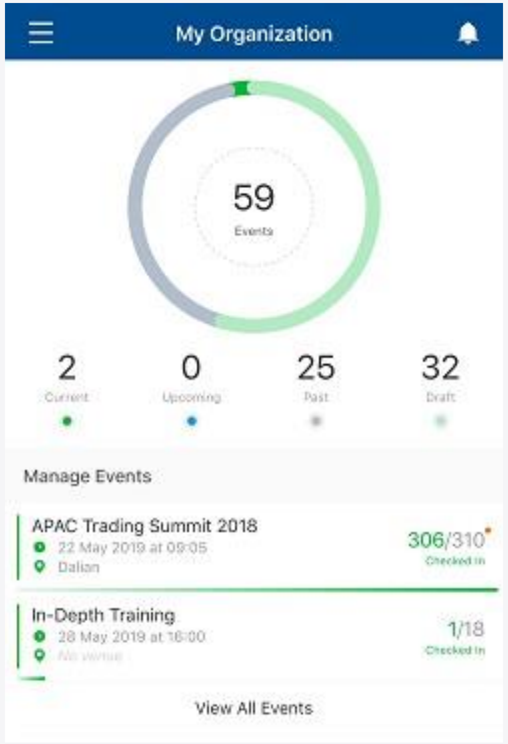


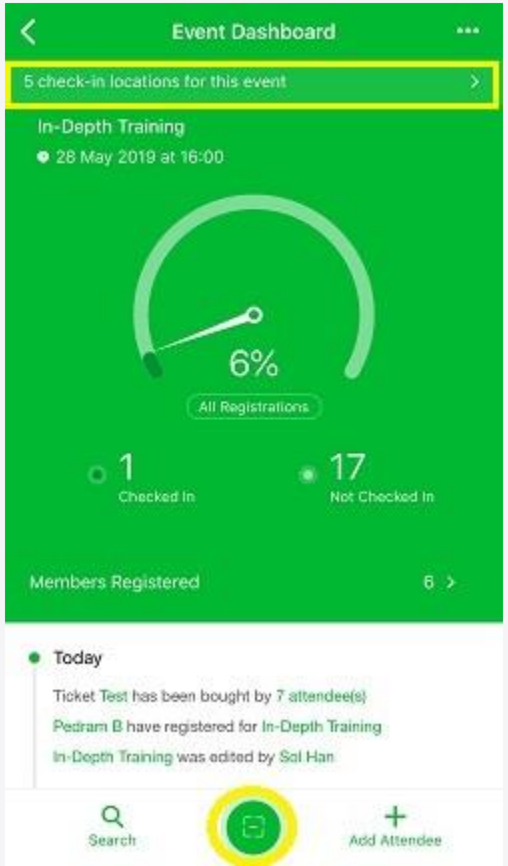


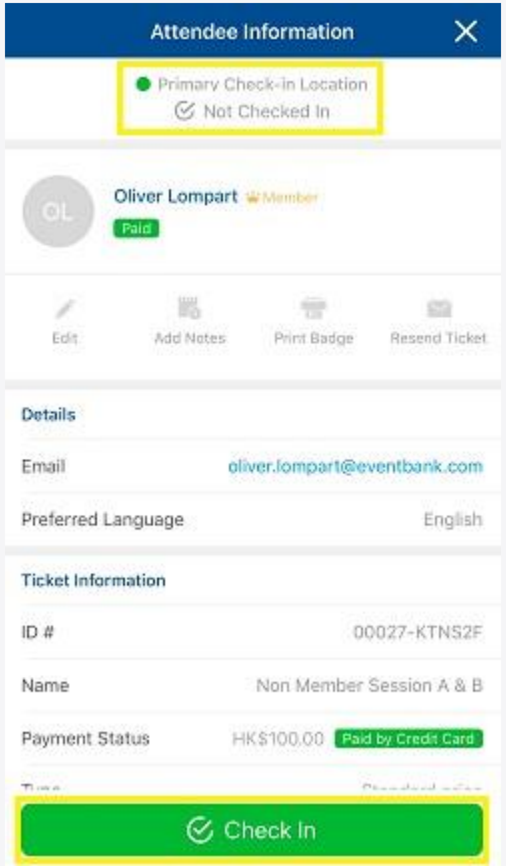
Multiple Check-in Points

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.



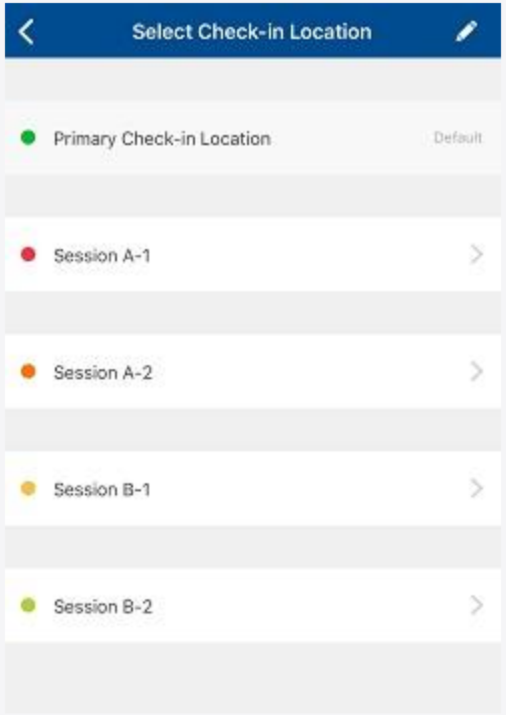


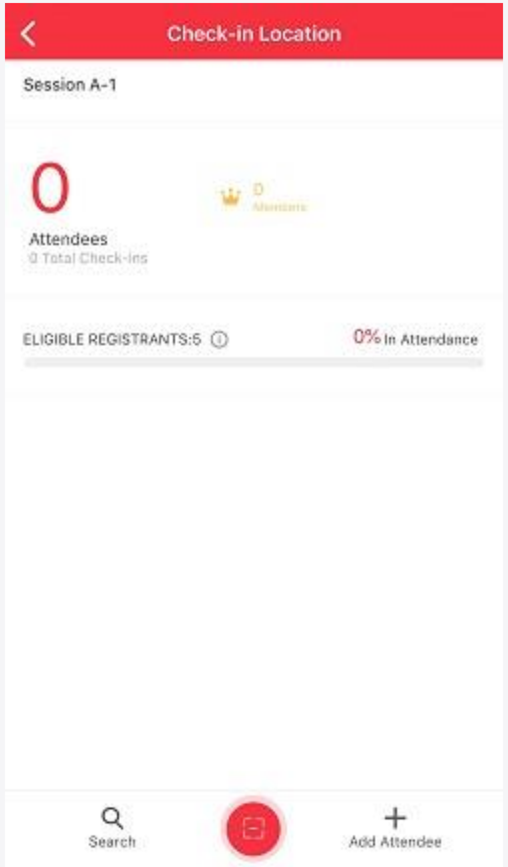


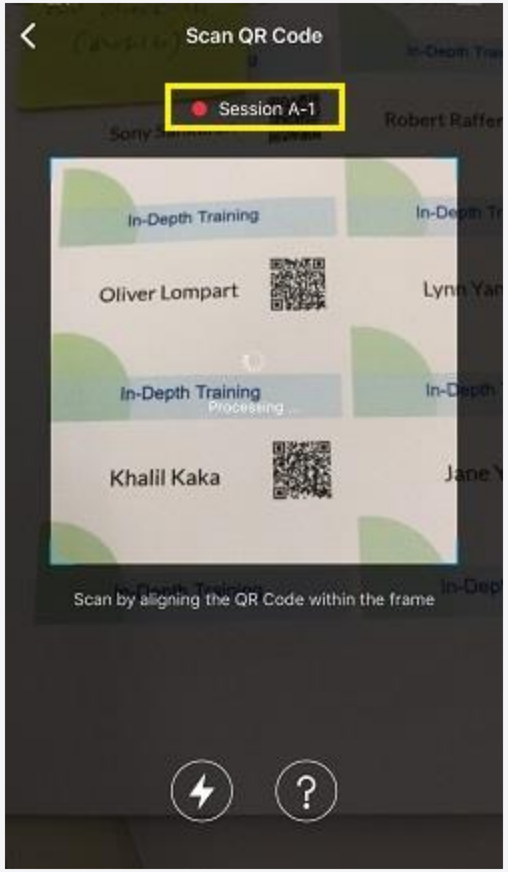
Multiple Check-in Points

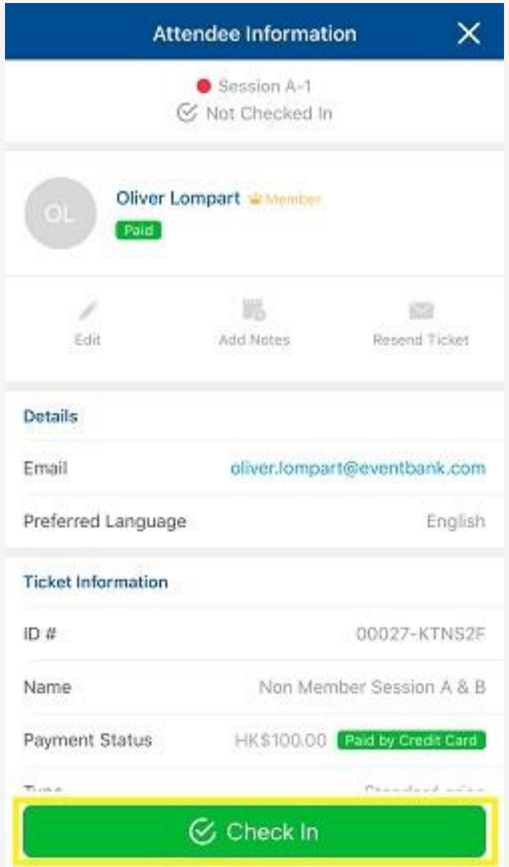
Mobile QR code Additional Check-in

- 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.





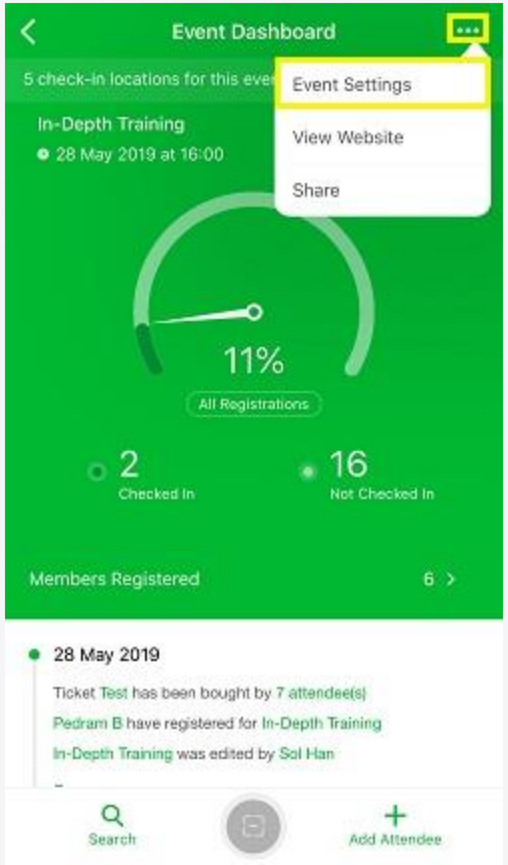


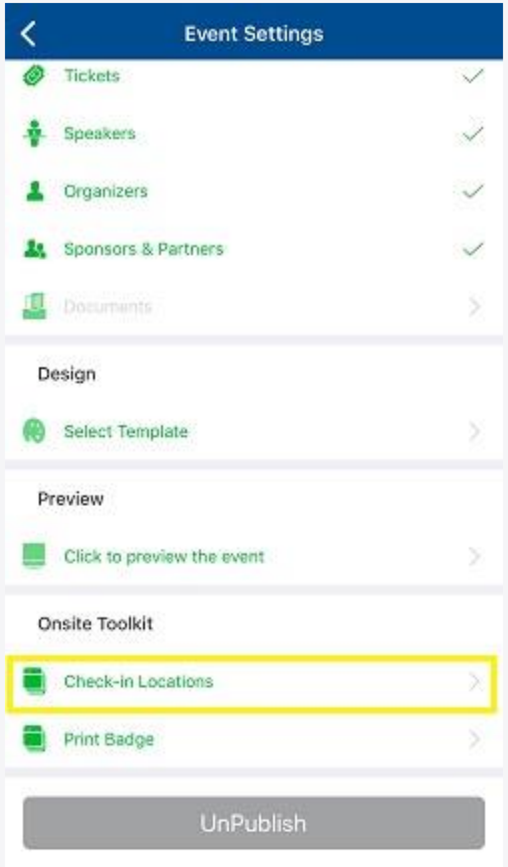


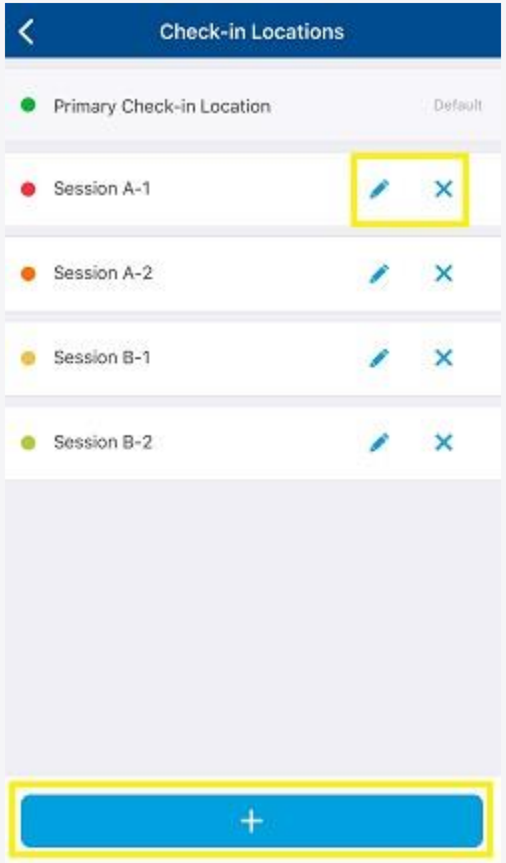
Multiple Check-in Points

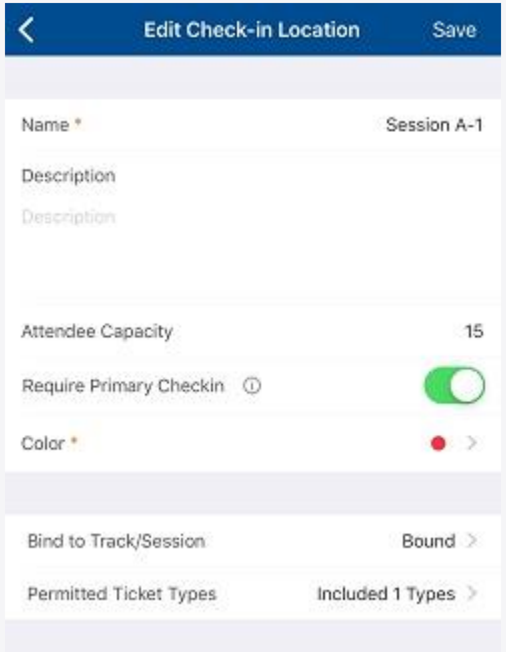
Manage Check-in Location (Mobile)

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

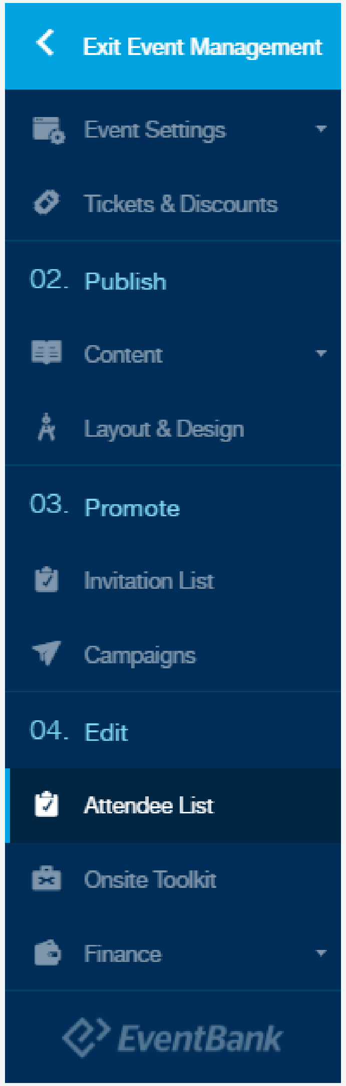






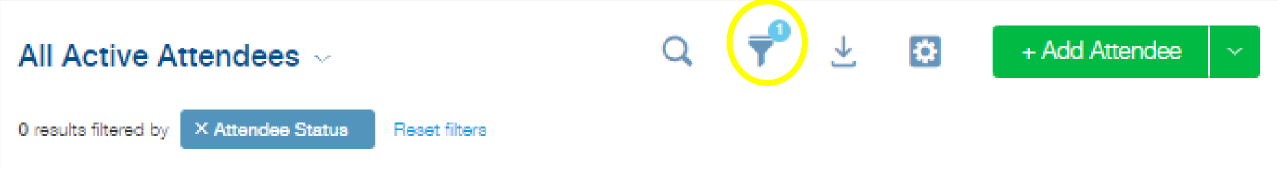


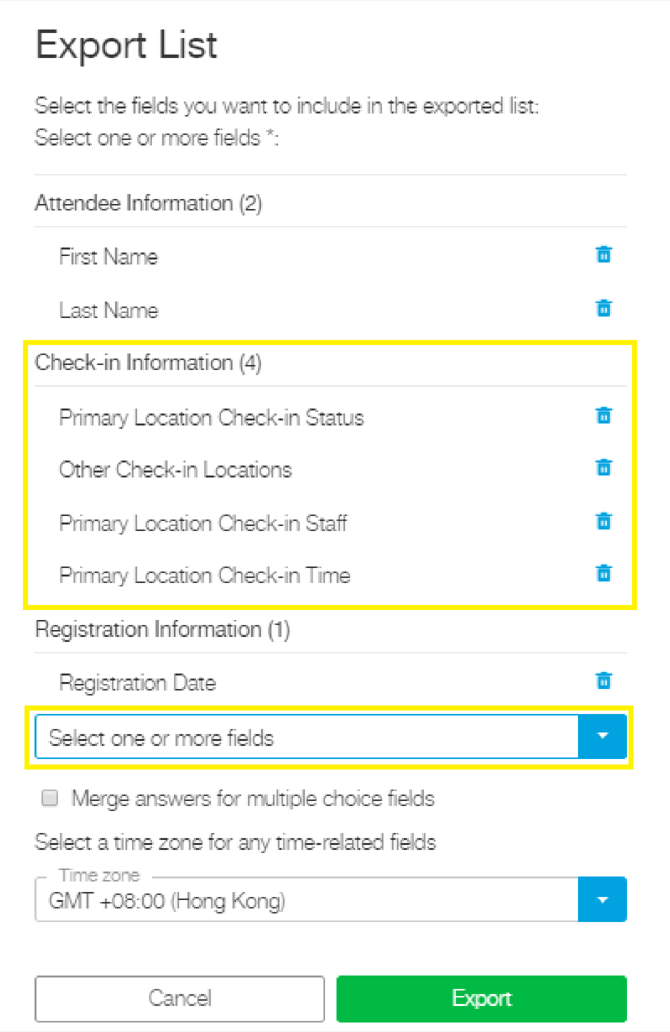
Multiple Check-in Points



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.

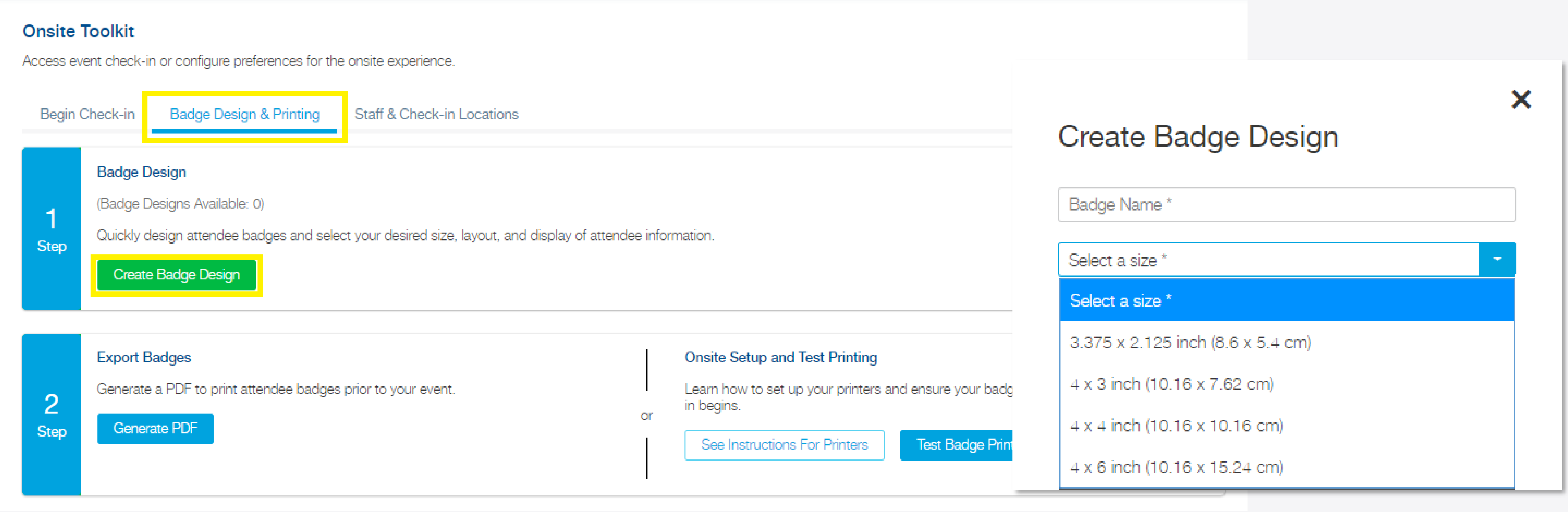




Badge Design & Printing

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 prinit, the recommended size for each printer is 3.375 x 2.125 – Brother QL-820NWB (QL-720NW) | 4 x3, 4x4, 4x6 – Zebra GX430t



Badge Design & Printing

Badge Design Editor V2’s updated item:

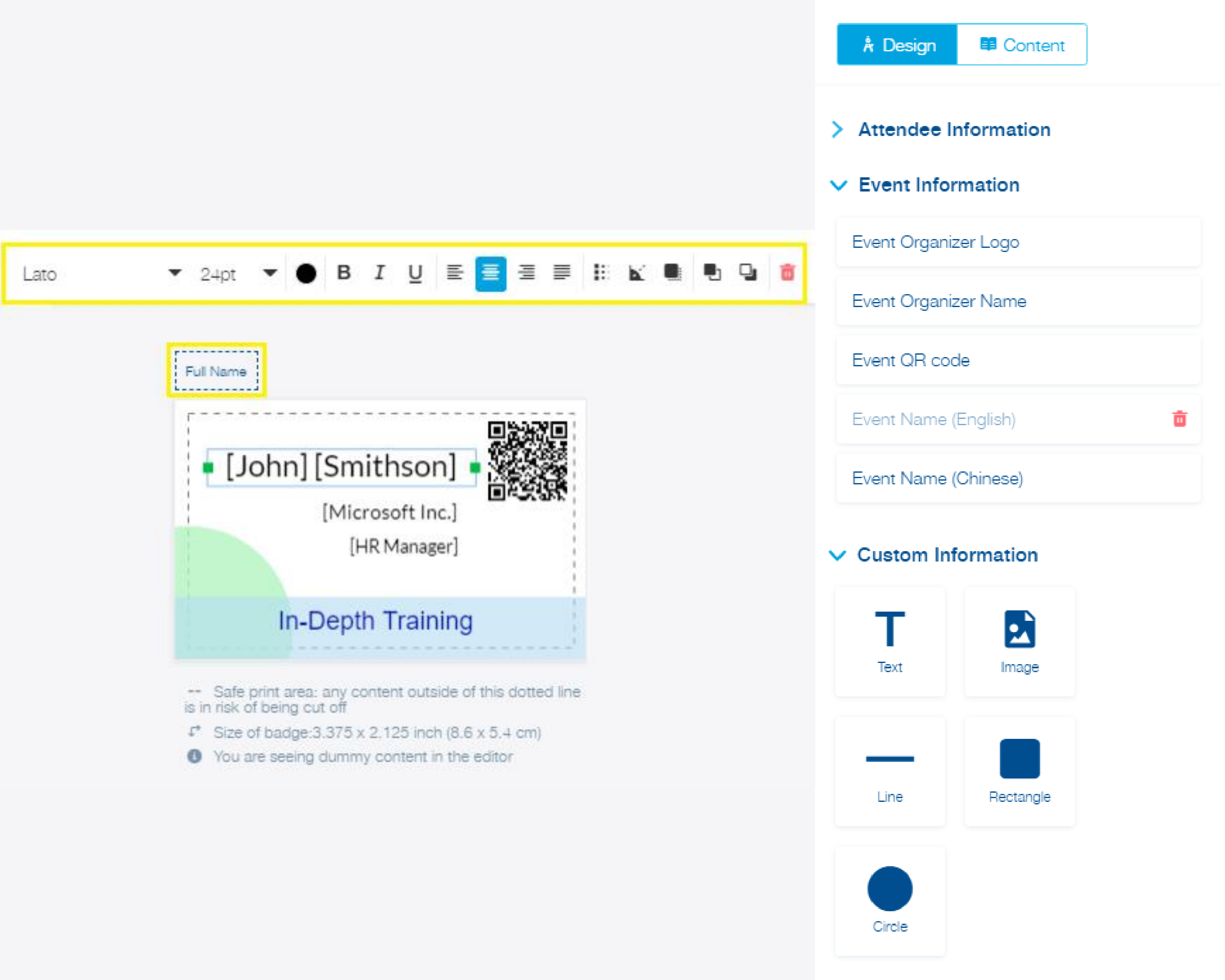
Information list

- 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.

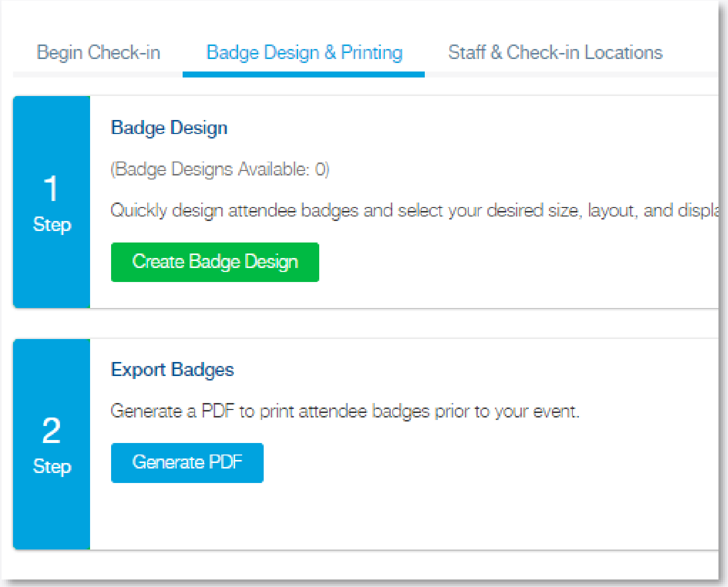
Most importantly, you can move around the each item and place it wherever you want.

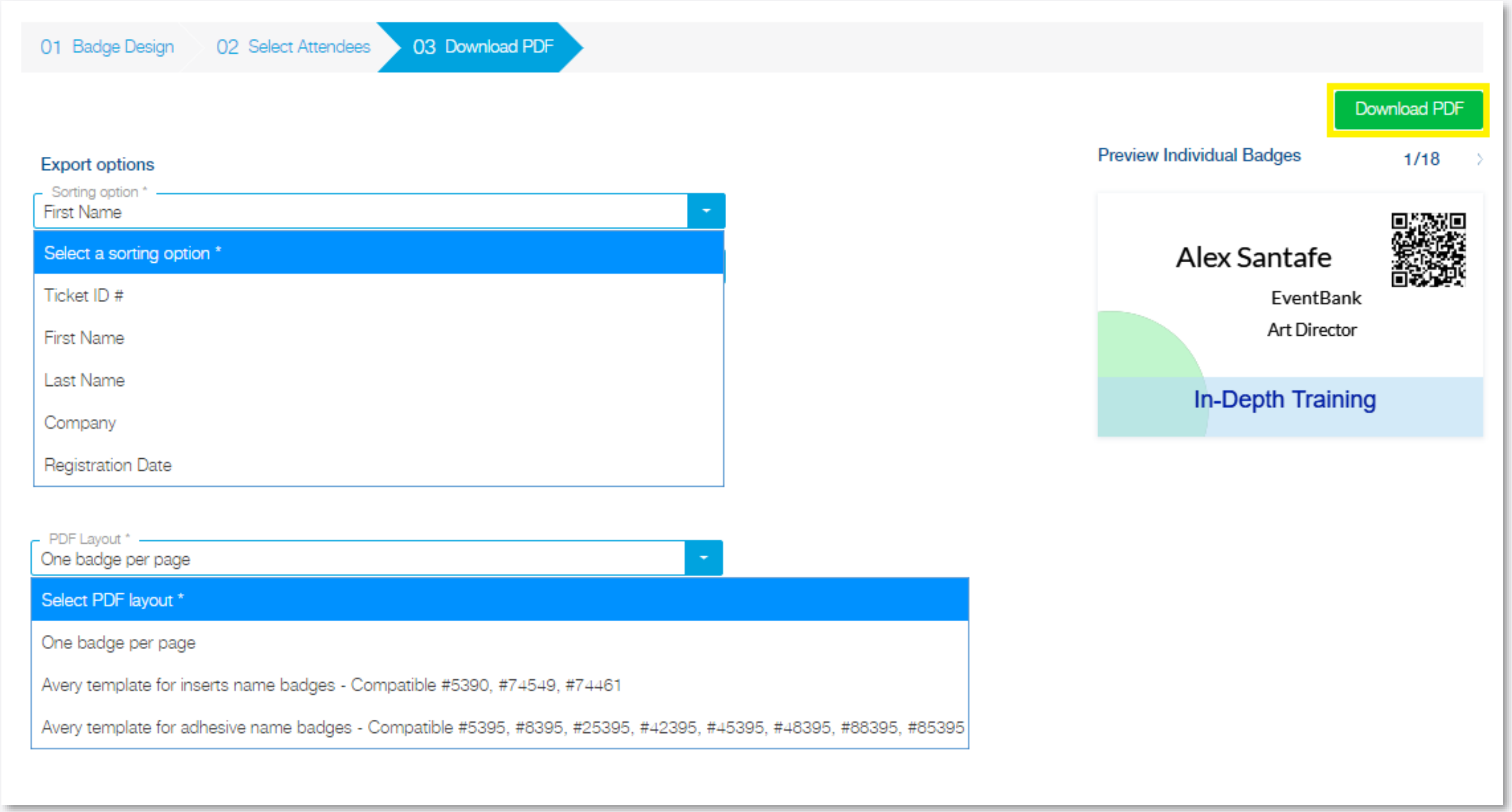


Badge Design & Printing

Pre-print the badges.

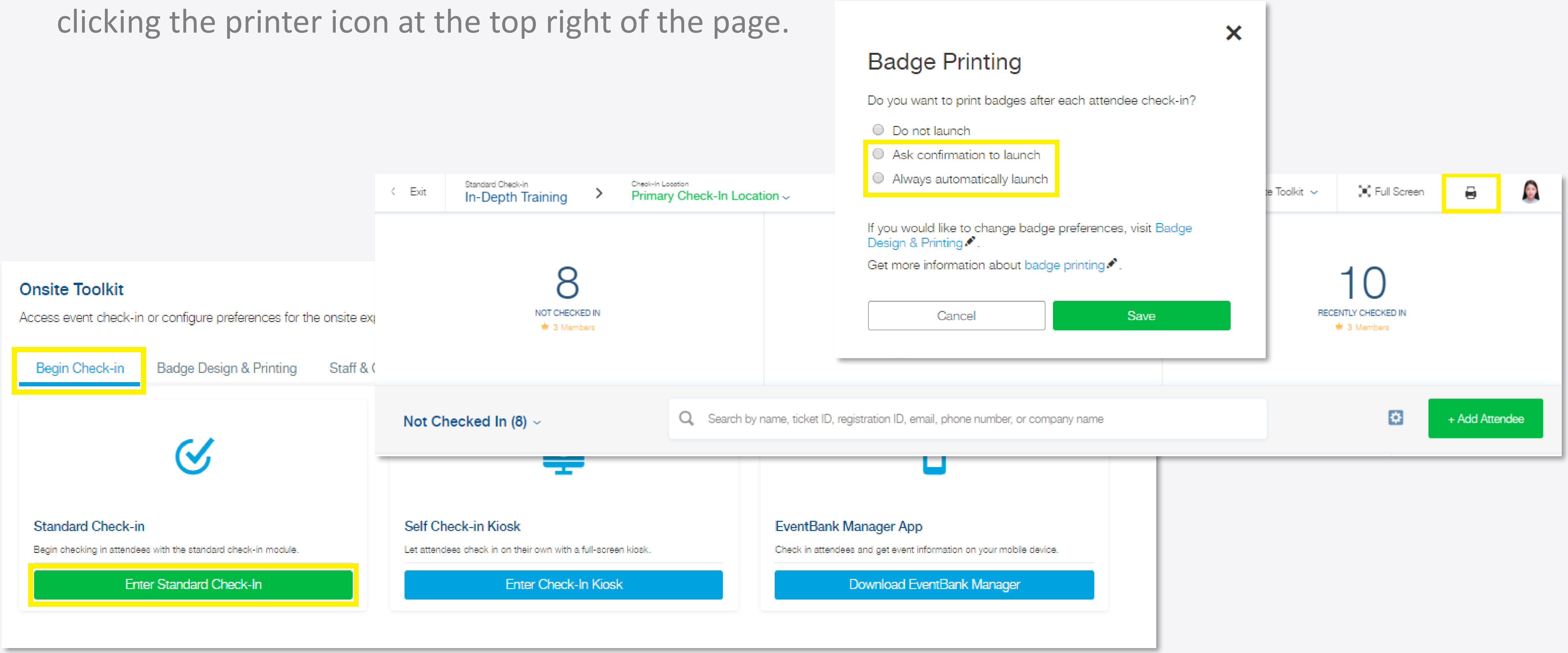
- After creating the badge design, enter Badge Design & Printing, and click the Generate PDF button. When pre-printing the badge, you will be able to use the normal printer and print it in color.





Badge Design & Printing

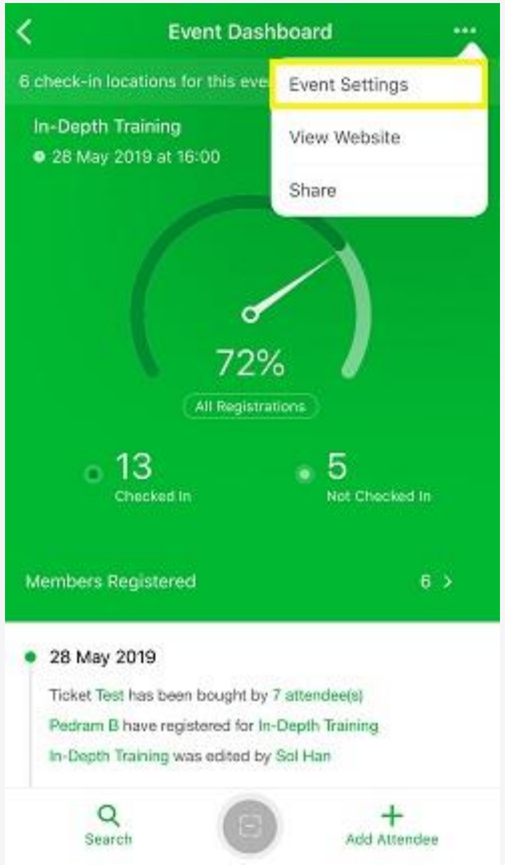
To print the badges onsite, please make sure you're connected with the printer, and enter the Check-in page to begin. In the Check-in page, please configure the badge printing workflow by clicking the printer icon at the top right of the page.

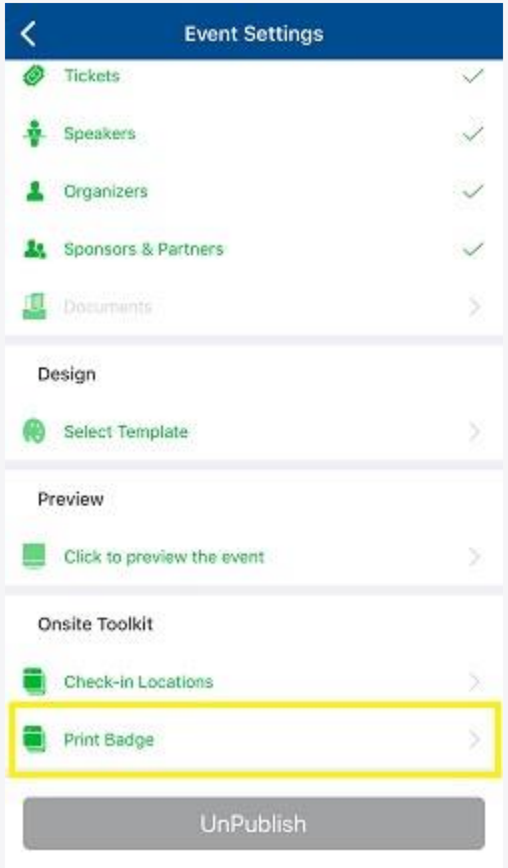


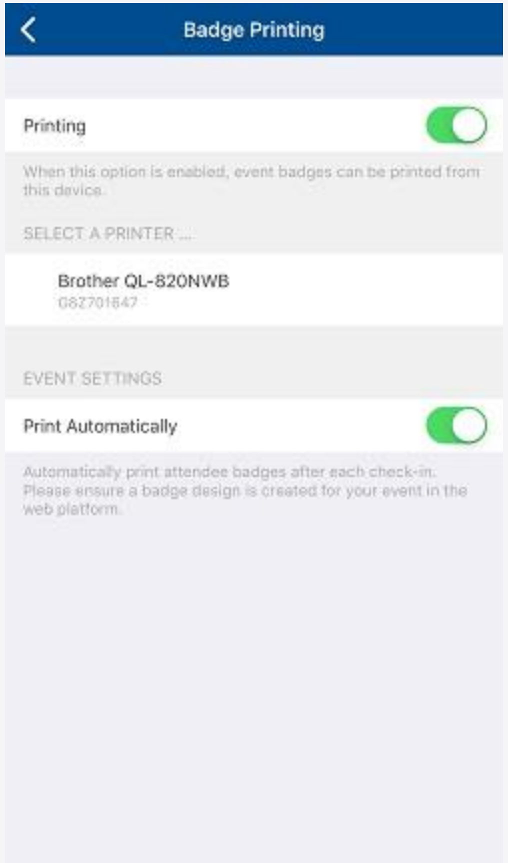
Badge Design & Printing

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.



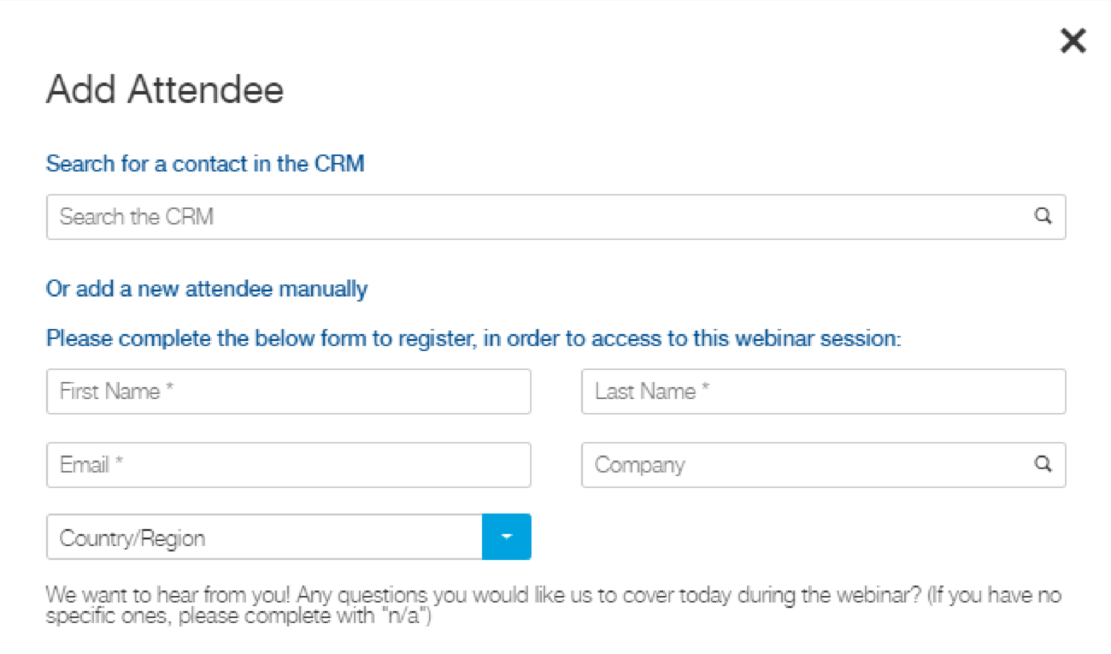


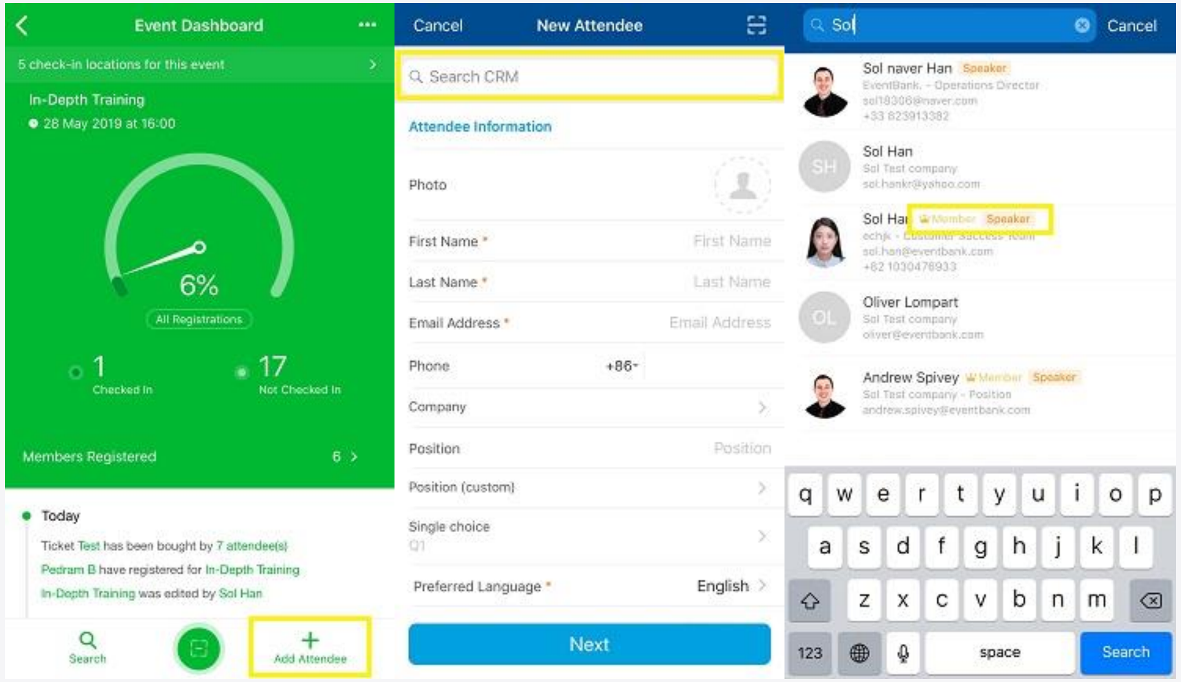


Tips

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.





Thank You

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