

Easy Check In Feature Setup

What does it do?

Easy Check in allows for you to run your live events effectively. You can denote potential attendees by tagging contact records in Infusionsoft. Using Easy Check In you can include in an invitation e-mail a QR code and Printable Badge for your contact to either print out or bring on a mobile device. When the QR code is scanned, the contact is tagged as attended and the check in time can be stored in a custom field. PlusThis provides an admin panel that provides real time data, displaying those who have been marked as attended, who is expected to show and who is marked as a non-attendee.

PlusThis Integration:

1. Select or create (using the + symbol) the tag that indicates which contact records might show up for the event (ie. are eligible).
2. If you will be scanning QR codes, pick or create the tag you want applied to the records when the codes are scanned. If you are going to be scanning QR codes to check in your attendees, you can apply a tag to a contact record when the QR code is scanned.
3. If you would like to store the check in time and/or date, create or select either a Date/Time field or a Date field to store the information in.
4. Under Badge options select your preferred setup (a preview will display

Easy Check-in

Selected Integrations: vt241

Event Configuration

Which tag indicates that a record is eligible for this event?

Registered for Event +

Apply this tag when the someone checks in. (By scanning the QR Code or clicking "check in.")

Checked In +

Where should we store the latest check-in time?

Event Check-in +

Badge Options

What should be displayed on the first line?

Full Name +

What should be displayed on the second line?

Company +

Create a unique QR code for this event.

Badge Preview



#<FullName>
Company

QR Code Check-in Options

Password protect this check-in.

Show a page after check-in.

Admin Area Options

Show Credit Card Details.

On the overview screen, show these additional fields:

Nothing +

Nothing +

Nothing +

On the "View Details" screen, show the status of the following tags:

Add a tag for display on the "View Details" screen.

on the right side for you to view) this is to configure the way your badge will look when you print/email it.

5. Select (or create) from the drop down which field you would like displayed on the first line under the badge.
6. If desired select (or create) from the drop down which field you would like displayed on the second line under the badge.
7. If you would like to create a unique QR code for this event, select this box. - If this box is selected, a unique QR code will be created for this specific event. If a unique code isn't created for each event, the same QR code can be scanned for all of your events, which is useful if you have multiple events with the same registrants.
8. Under Check In Page - Configure details for the page that loads when a QR code is scanned.
9. If you would like to place a password on the screen to prevent people from scanning their own QR codes and checking themselves in, select this box.
10. If you would like to display another page after the QR code is scanned and the registrant is checked in, select this box and title the page and select the fields you would like displayed.
11. Configure additional options for the Admin area in PlusThis for your Event Check-in
 - If you would like to show your contact's credit card information

Thursday Event Check In Easy Check-in

Event Menu ▾

Reset

Show 50 entries

Id	Name	In	Actions
816	Dropdown Test	No	Check In View Details Badge Remove
1278	New test rick	No	Check In View Details Badge Remove
810	Pagetrigger	No	Check In View Details Badge Remove
822	Test	No	Check In View Details Badge Remove
826	Test	No	Check In View Details Badge Remove
828	Test	No	Check In View Details Badge Remove
1270	Test	No	Check In View Details Badge Remove
1264	Test Frank FrankTest	No	Check In View Details Badge Remove
1262	Test Frank test	No	Check In View Details Badge Remove
774	TEST Test	No	Check In View Details Badge Remove
812	Test Test	No	Check In View Details Badge Remove
1260	Test Tester	No	Check In View Details Badge Remove
1266	Testingparty	No	Check In View Details Badge Remove
616	Testttt Test	No	Check In View Details Badge Remove
1248	This is a test Testerson	No	Check In View Details Badge Remove

Showing 1 to 15 of 15 entries

Previous
1
Next

on file, select this box and on the admin screen it will display the type and last 4 digits of the card number on file that was most recently added. If you would like to add a new/updated credit card at the time of check in- you can do so if this box is selected.

12. On the overview screen, show these additional fields:
13. If you would like additional information shown on the overview screen (i.e. company, anniversary, email etc).
14. On the "View Details" screen show the status of the following tags
15. If you have a specific tag that you would like to see (i.e., elite tag, VIP tag etc) you can choose to display those tags here.
16. Name and save your feature.
17. All contacts with the eligible tag will be displayed in the list. You can either scan their QR code using any QR code scanning application or manually check in the contacts by searching their name and selecting "Checkin"