How to Configure Certain Check-In

This document is a brief guide for the event planner, about configuring Certain Check-In and Certain Kiosk for an event.

This advanced feature of the Certain platform enables you to use a mobile device to check attendees in to your event as they arrive, or (with Certain Kiosk) to answer survey questions at the event.

Certain Check-In is not enabled in an account by default, but if you're interested in it after reading this document, please contact your Customer Success Manager (CSM).

(***Note:*** There is a separate Certain Check-In "Quickstart" guide for users of the actual **Check-In** app itself – one each for the iOS, Android and Windows versions. These are available from within the Page Help for Certain, or the dedicated help for the Check-In app.)

Contents

Enable Check-In for the Account

Certain enables Certain Check-In for the account.

An Account Administrator can enable it in a sub-account:

1. Go to > Account Settings > Implementation > Products
2. Select "Certain Check-In"

Branding

An Account Administrator brands Check-In for the account.

1. Go to > Account Settings > Implementation > Check-In Branding
2. Upload the **Account Logo** to be displayed at the top of the app's Home page.

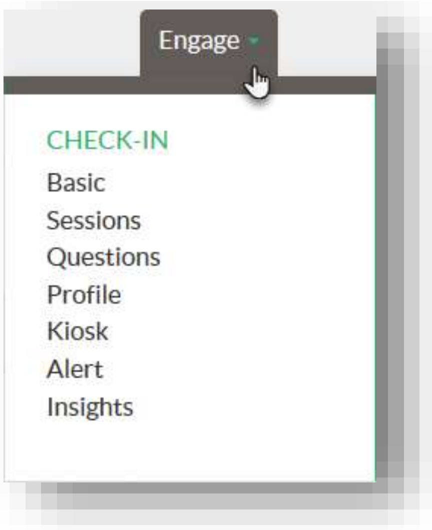
3. Set the color of the **Header/Footer Background**. (Text, such as the event name, is displayed in white, so ensure the background has sufficient contrast.)

Enable Check-In for the Event

In the event, go to Plan > Configure > Options, and select the Certain Check-In sub-module (of the Event module) under Options to Configure for the Event.

Basic Configuration

For all the event-level configuration options, go to Engage > **Check-In**. The first option is **Basic**.



On the **Basic** page, select the attendee types, registration statuses and profile fields for the guest list.

The **Temporary Access Code** you see here is generated automatically. It's a temporary login ID to Certain Check-In for this event, for use by people you have authorized to use the app although they don't have a Certain user account. (Temporary on-site staff employed only at the event, for example.)

Provided you have already added at least one on-demand badge layout (on **Manage > Badges and Barcodes > On-Demand Badges**), you can choose to **Enable Badge Printing**. Each attendee's badge is then printed automatically when they check in.

If you choose to **Allow Walk-Ins**, attendees will be able to arrive at an event without having pre-registered for it, and be registered at the door using the Check-In app.

Once configured here, the event will be available for use in the Certain Check-In app, provided its event status is anything other than "Testing", and its End Date is not more than seven days ago.

The Guest List in the app always shows the attendee's **First Name** and **Last Name**. You can choose two additional fields, which by default are **Organization** and **Position**. For example, you might choose "City" and "State", or "Attendee Type" and "Country".

Sessions

If Speaker and Session Management is enabled for the event, go to Engage > **Check-In > Sessions**. If you set **Check-In Enabled for Sessions** to "*Yes*", you can then choose whether attendees may come to sessions without pre-registering for them. If so, you can then restrict that to selected sessions, or enable it for all non-fee sessions.

Questions

Go to Engage > **Check-In > Questions** to select up to ten custom profile and registration questions to ask during the check-in process.

Profile

The Attendee Profile screen, shown when the app user taps a registration to see more detail, or when adding a new Attendee, always includes First Name, Last Name, and Email. (These fields and their sequence are not editable.)

To select additional profile fields to be shown (to a maximum of 15), go to Engage > **Check-In > Profile**.

Kiosk

If you will be using the Survey Mode available on Certain Kiosk for attendees to answer questions during the event, go to Engage > **Check-In > Kiosk**.

Set the toggle to **Yes**, and select the questions to ask. You can also customize the messages Kiosk users see.

Alerts

You can receive SMS alerts when selected attendees, probably VIPs, check in. To configure this, go to Engage > **Check-In > Alert**, and step through the wizard to set up alerts for the attendees you select by filtering on **Organization** and **Attendee Type**.

Add the details of each contact to whom alerts should be sent, using their text-enabled phones.

Insights

To see charts illustrating Check-In data as it is captured in real-time, go to Engage > **Check-In > Insights**.

You can change chart types, how they're displayed, resize them as required, drill down into reports showing the data, and even save the images for use elsewhere.

Reports

A custom report of report type '**Check-Ins**' returns one row per registrant per check-in.

A '**Check-Ins Across Events'** consolidated report type does the same across *multiple* events.