

Easy Check-In Implementation Guide

Transcript

Features Used:

- Easy Check-In
- Math

Transcript

Today will be using two Plus This features to create a scenario where we are a gym and we are offering multiple classes there, in person classes, and I want to track how many classes somebody attends within a certain period of time. So, we're going to use two features. One is called Easy Check-In and one's called Math. The first thing we're going to configure is the Easy Check-In Feature. Now before we configure this, I'm going to pop over to my overview and show you what we're going to be doing.

So what we're going to be doing, is we're going to have some sort of entry point. Now, this is all configurable inside of your marketing automation system whether it be a tag, a webform or simply they've reached a certain point in your funnel and then we're going to apply an "event eligible" tag, denoting that they are eligible to come to these classes. We'll send out some sort of invite communications, and then utilizing the Easy Check-In Feature that Plus This has, we can actually tag them upon check-in. So we can say they've checked into this class then once that tag is applied, this goal will be accomplished. They will move forward in the funnel and we will be triggering another Plus This feature, called Math, to add one to the field and then we're also going to remove the "checked in" tag using our marketing automation system. This allows for that "checked in" tag to be applied again, so that they can continue to attend multiple classes.

So let's pop back over to PlusThis. Inside of Plus This you're going to make sure that your marketing automation system is linked. (I've linked mine up). If not, it'll prompt you to do so. Then we're going to come in and configure the event. So, that tag that I was talking about the "event eligible" tag, that is the tag here. So we're going to enter a tag "eligible for classes", and then when someone does check in, I want to apply a tag denoting that they've checked in.

If you'd like to the time or the latest time they've checked in, you absolutely can by selecting a field right here. I don't have a need to do it currently, so I'm not going to set it up.

Now our Easy Check-In feature does allow for badge creation. They are very simple badges. They're just a QR code and then two different fields that you'd like to select. Now, you can utilize a QR code reader, and that's ANY QR code reader you can get from the Apple App store or the

Google Play store. It doesn't need to be a paid one, nothing specific. Just a generic QR code reader. And if you scan [the QR code] the person will be "checked in" and they will receive the "attended class" tag. I'm going to go ahead and leave my badge to just have the Full Name and then just the QR code right there.

If you have multiple events, it would be useful to check [the "create a unique Qr code for this event] box because each contact record gets their own QR code however, if you have this box checked, then this QR code can only check in people for this specific event. There is always the possibility someone is eligible for multiple events, and in that case, if you scan the QR code and this box is not checked - you get to select which event to check them in for. I'm going to go ahead and not check this, because this is my only event.

You have an option to password protect the check-in so people can't scan their own QR code. It's up to you if you'd like to do that. Or you can show a particular page after check in. You also have the ability to show credit card details which also allows for you to collect credit card details as well. I don't need this in mine, as all I'm using this for is to check to see if they can come to a class and apply a tag. So I'm going to name this "class event" and hit save.

What pops up is everyone who has my "eligible for classes" tag. So when someone comes to my gym, I will be able to search for them. Now let's say we're looking specifically for Richard. Just start typing his name - and it will pull up "Richard" right there. Then we'll just need to check the green "check-in" button and when it says "would you like to check them in" - click yes, and then the "attended class" tag gets applied.

Now, we're going to move on to our second Plus This feature. We'll go back to our Plus This library - and type in Math. Then we get to configure our Math feature. So, under this "please select a value type" I'm going to select "the value in a field" because I want to increment the value found in one of my custom fields that field is "number of check-in's" and then I'm going to add the number 1 to the Number of Checkins and store it in the same field. That way it increments each time someone passes through the feature.

I'll name and save the feature and Plus This will give me a url or event name. I'll place this in my Marketing Automation System right after the "attended event" tag - and right after the Math event is completed, I'll remove the "attended event" tag, so someone can come back through the next time they check in, they'll get the tag and go through the math feature to increment the field and so on and so forth.

Don't forget to check out our other Implementation Guides on the right hand pane of the PlusThis application for more ways for PlusThis to help you.