EXPOPLATFORM

# Badge design & onsite check-in

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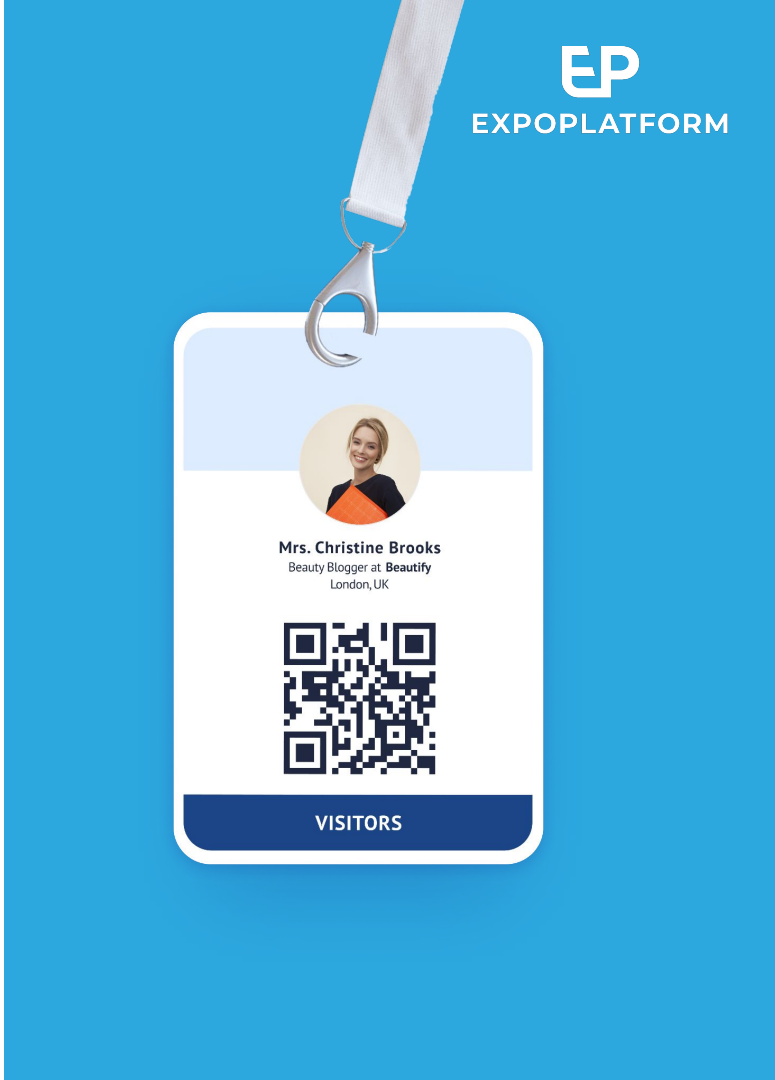
# BADGE DESIGN & ONSITE CHECK-IN

# Introduction

- ExpoPlatform provides you with an easy way to **design and create your branded badges** in a print and digital formats.
- This feature comes with 2 dedicated onsite modules:
    - **Check-in app**, which enables the organiser to scan the visitors as they enter the exhibition zone or conference rooms
    - **Kiosk mode**, which enables visitors self registration onsite from a tablet or computer
- Organisers benefit from an **all-integrated end to end solution** to manage badging and check in onsite.
- This guide illustrates the process step by step.

# INTRODUCTION

1. ExpoPlatform provides you with an easy way to design and create your branded badges in a print and digital formats.
2. This feature comes with 2 dedicated onsite modules:
    - Check-in app, which enables the organiser to scan the visitors as they enter the exhibition zone or conference rooms
    - Kiosk mode, which enables visitors self registration onsite from a tablet or computer
3. Organisers benefit from an all-integrated end to end solution to manage badging and check in onsite.
4. This guide illustrates the process step by step



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4. Using the Checkin app (onsite)

5. Using Kiosk mode (onsite)

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# PRINT BADGE CREATION

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# 1. Print Badge creation

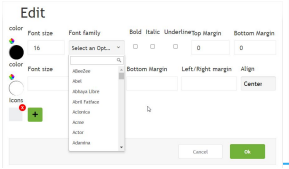
# 1. Designing your badges

Go to **Registration settings / Badges.** You can edit a badge for each participant category:

1. Choose the Participant category

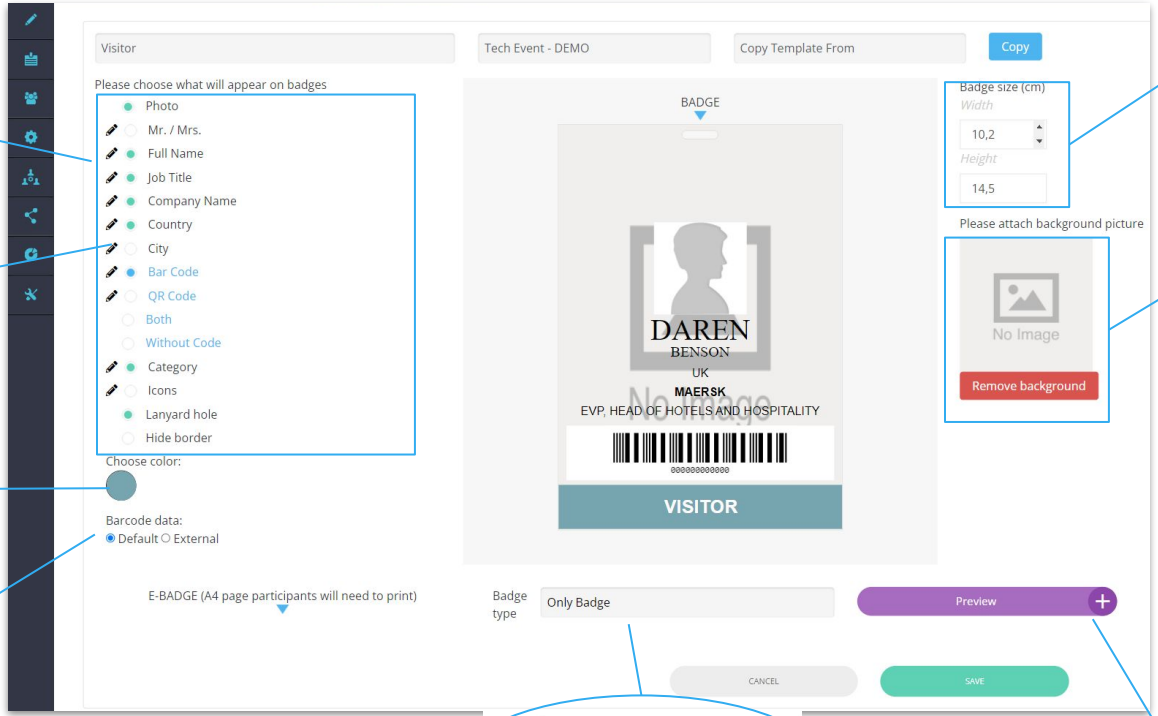
2. Tick the info that needs to appear on the badge

3. By clicking on the pencil icon, you can edit the font type, size, color and add margins

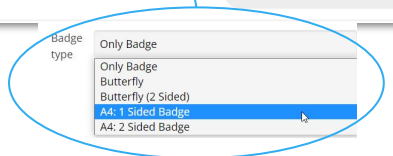



3. Select the Colored footer of the badge

4. The Barcode can be internal (EP) or your external barcode. Supported external formats are:
**ITF, CODE128, EAN-13**

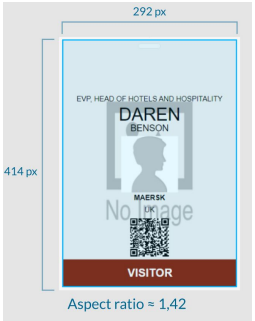



5. Select your badge layout




6. The badge size can be adjusted from here, when you select “Only badge” and ”Butterfly”

7. Upload your background image.
For a vertical badge like A4, an image **ratio of 1.42** is required.
Recommended sizes that fit are: **600x422, 1000x704.**




8. At any time, click preview to see the actual result and print

# DESIGNING YOUR BADGES

Go to **Registration settings / Badges.** You can edit a badge for each participant category:

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- Tick the info that needs to appear on the badge
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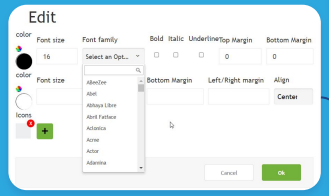


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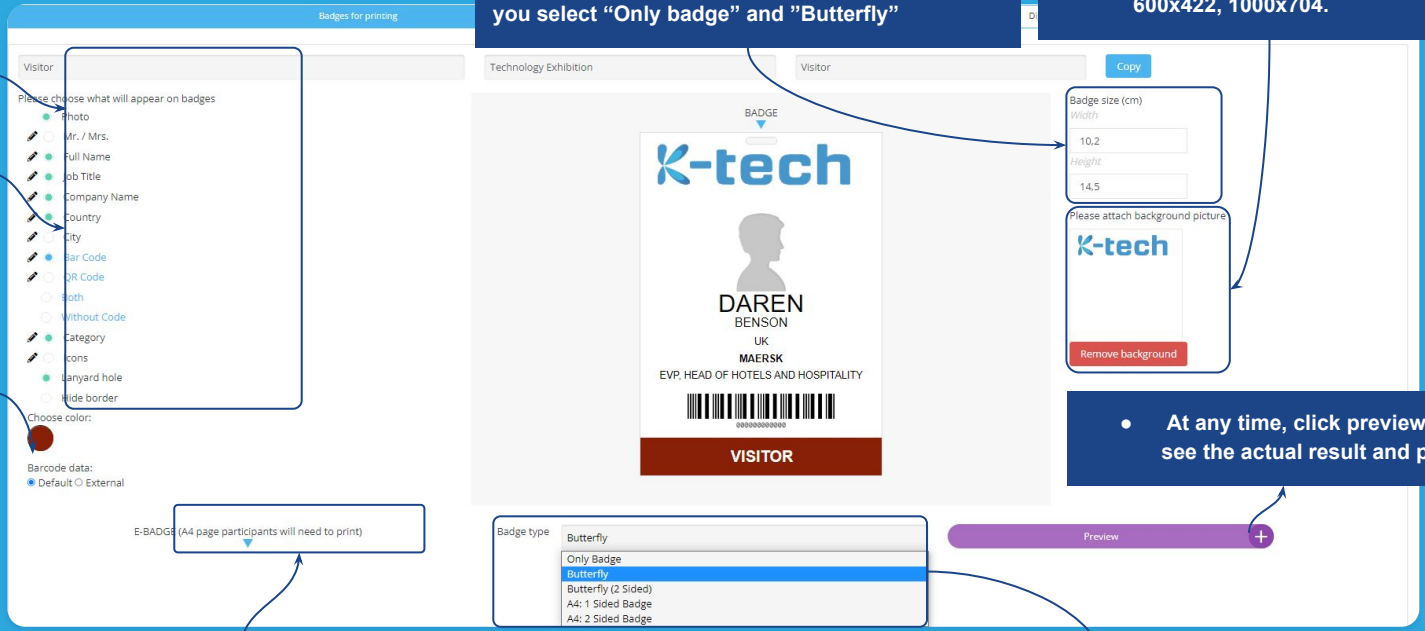



- At any time, click preview to see the actual result and print

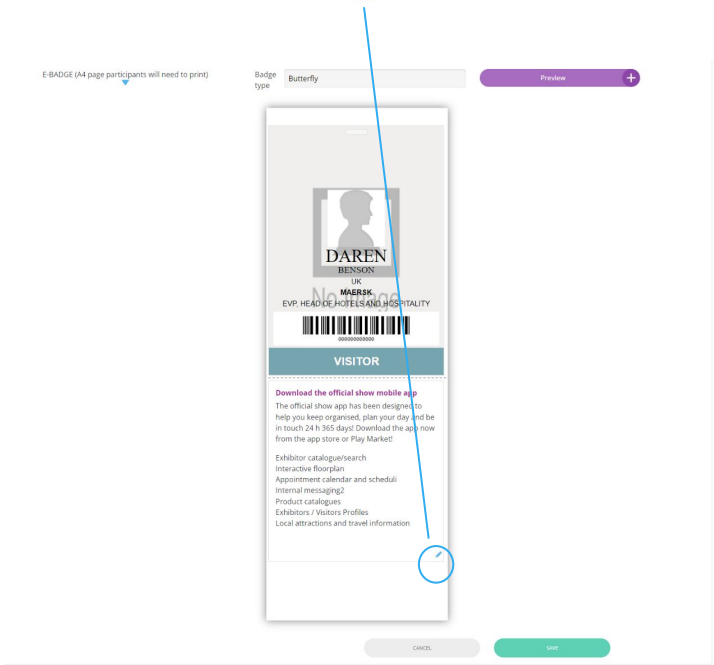
- The Barcode can be internal (EP) or your external barcode. Supported external formats are: ITF, CODE128, EAN-13

- Select your badge layout

# 2. Best practice to edit the text

You will be able to edit the other sides of the badge by scrolling down on the page.

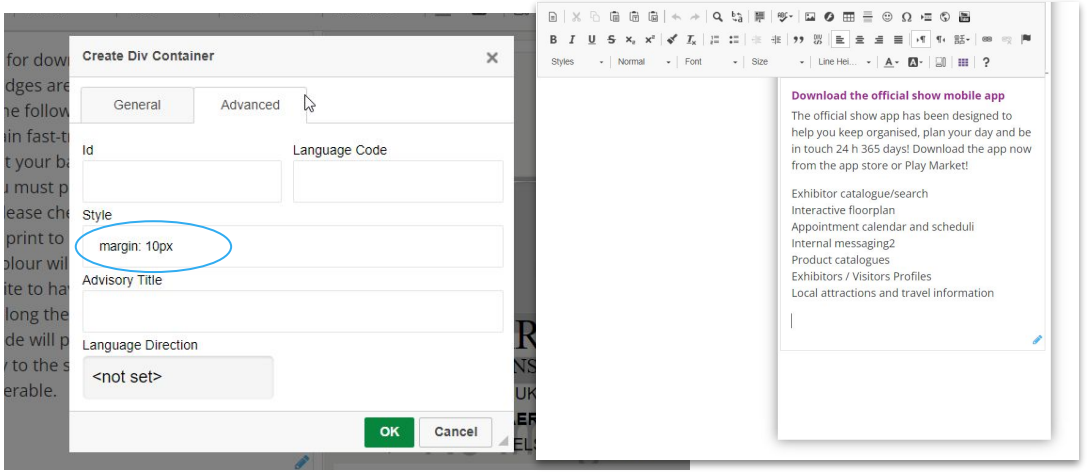
**1. Click on the pencil icon** to open the Editor menu:




**2. Before adding any text or images, use the "Div" button to set a container that includes margins.**

**3. In the DIV menu, click on "Advanced" and use the "margin: __px" formula in the Style field to set your margins.**

**We recommend using "margin: 10 px"**




You can then add your opening hours, sponsor logos and any other relevant info.

# BEST PRACTICE TO EDIT THE TEXT

You will be able to edit the other sides of the badge by scrolling down on the page.

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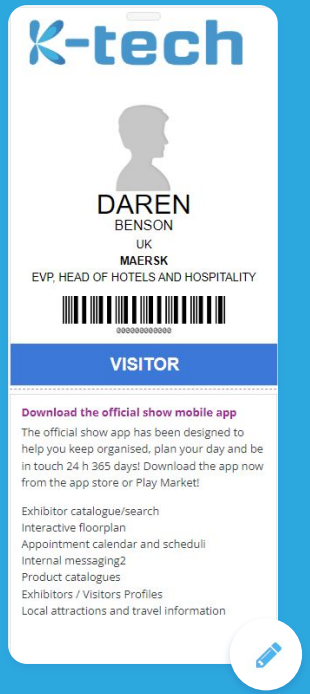


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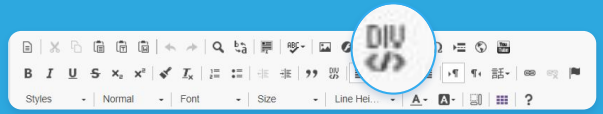


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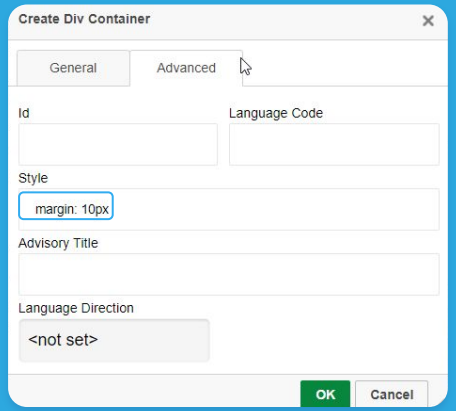


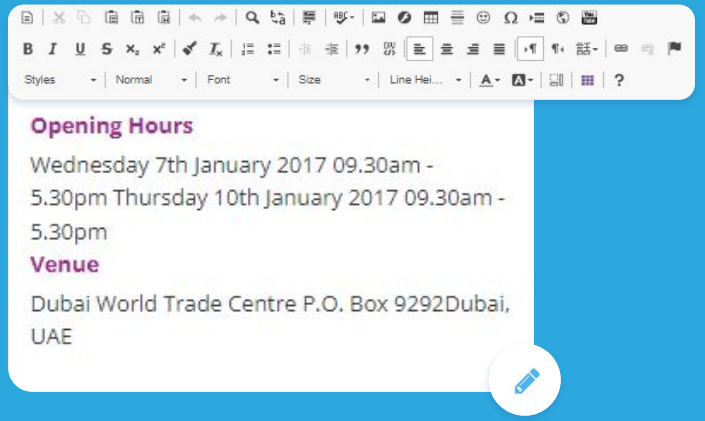

# 3. Saving time creating your badges

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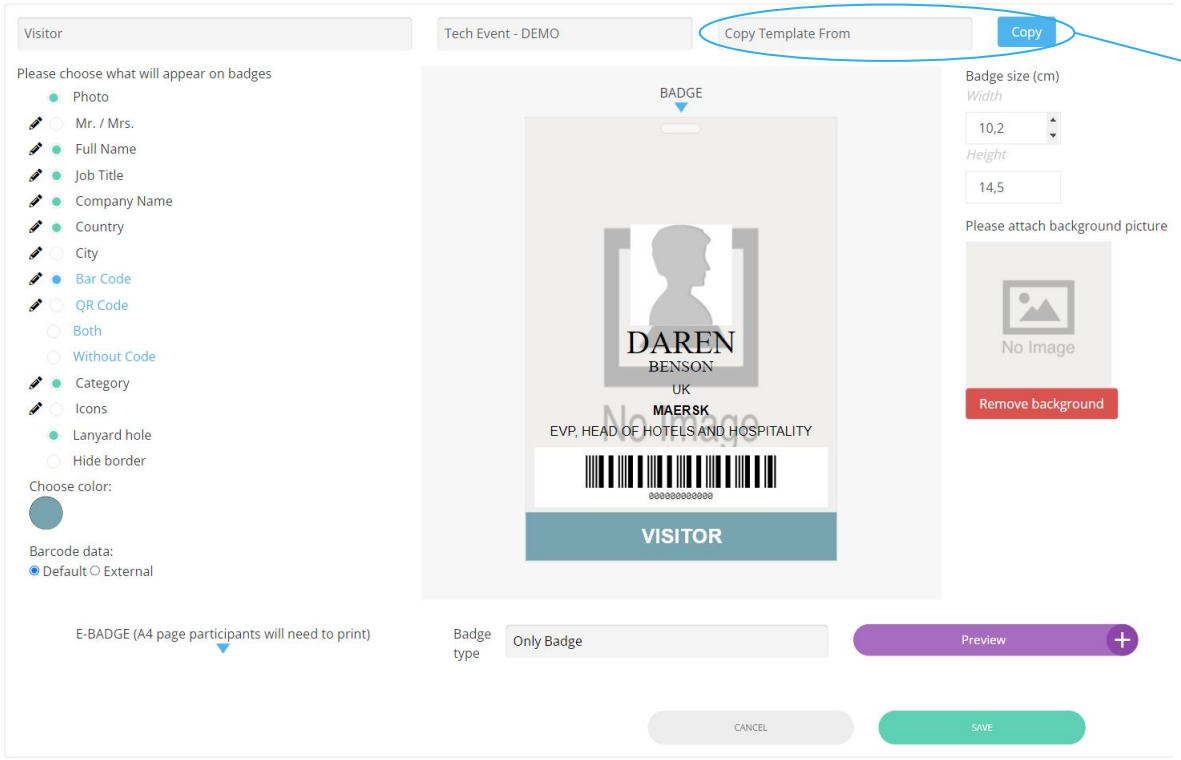


After completing your first badge, **save time by copying this template** for the next badges that you are creating.

# SAVING TIME CREATING YOUR BADGES

After completing your first badge, **save time by copying this template** for the next badges that you are creating.

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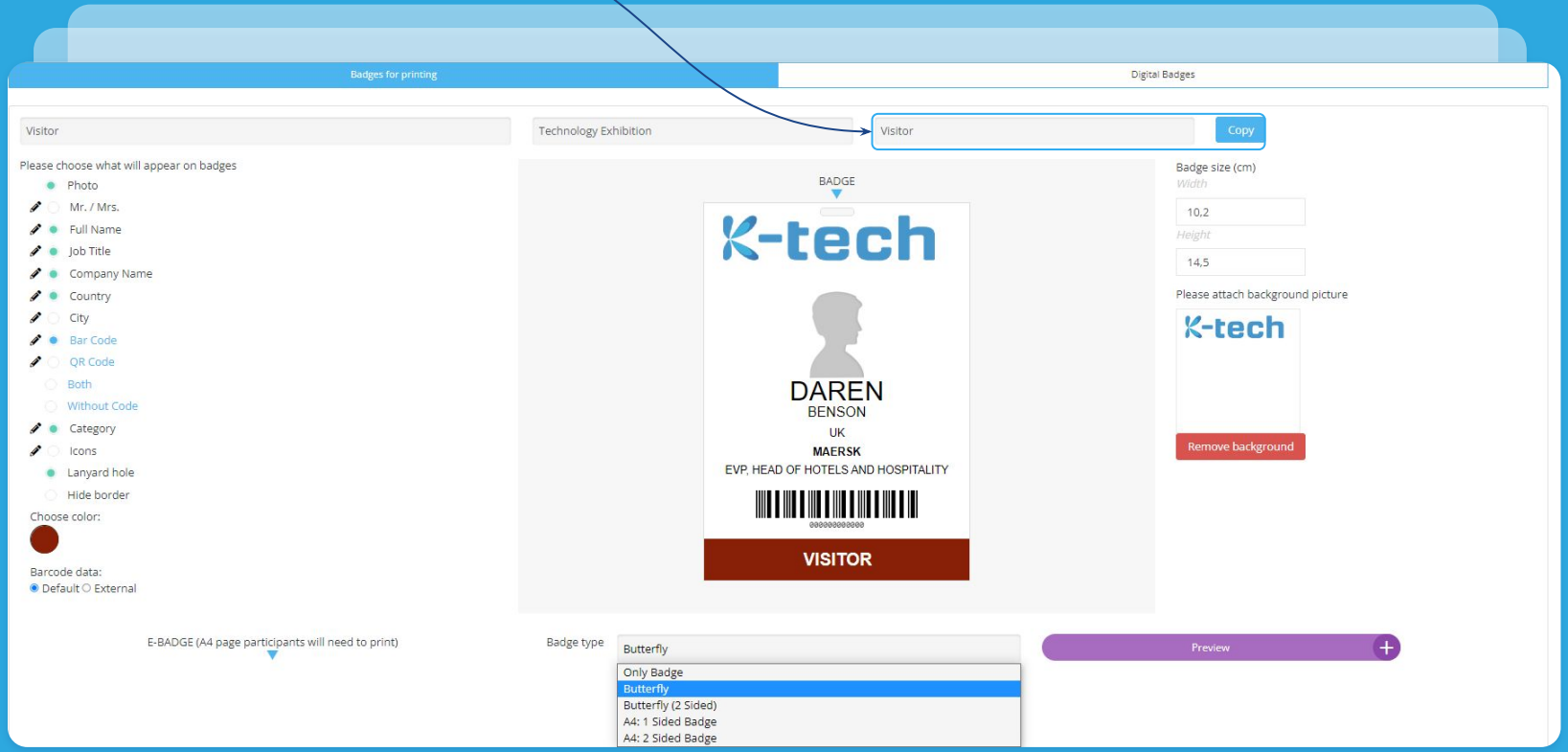
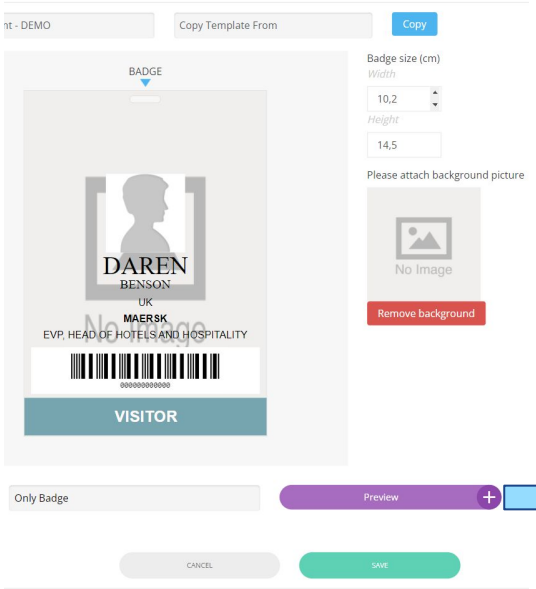
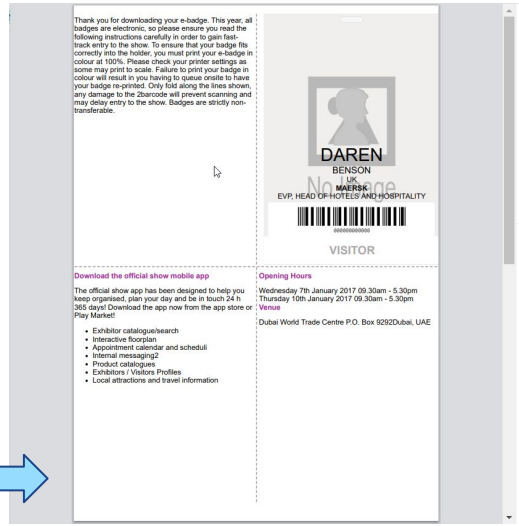


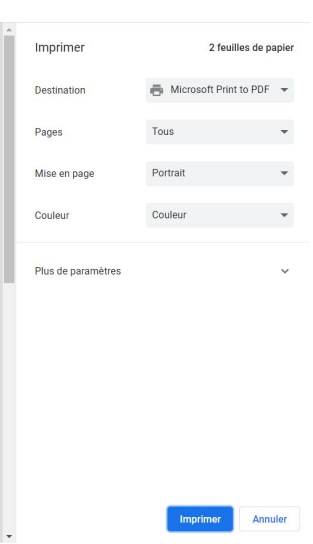
# 4. Testing your badge for printing

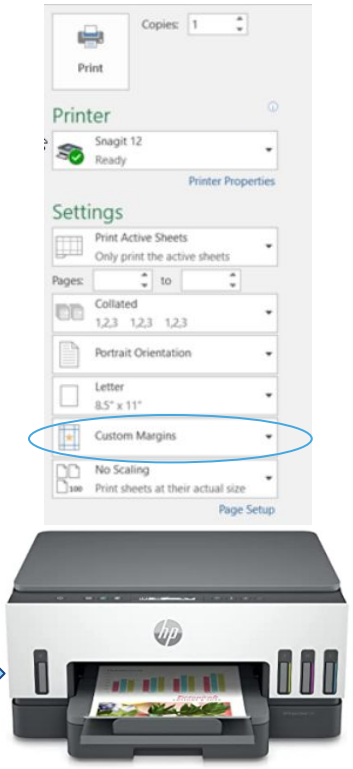
Click on **Preview** and print your badge to validate the result.

**Printer Settings:** Some printers default settings may vary, so it is important to check these settings and run a test ideally on the printer that will be used onsite.
Depending on the result, if your margins need to be adjusted, please click “**Margins**” on the page layout tab, then select “**Custom Margins**” and type the desired amount.



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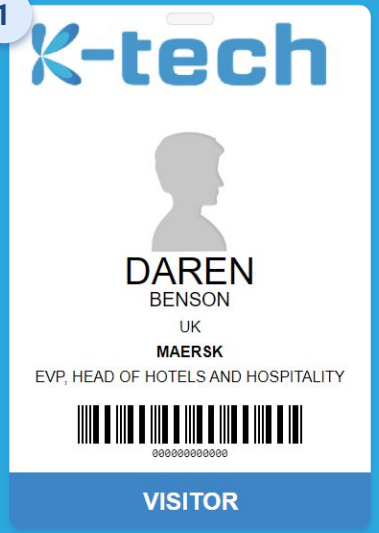


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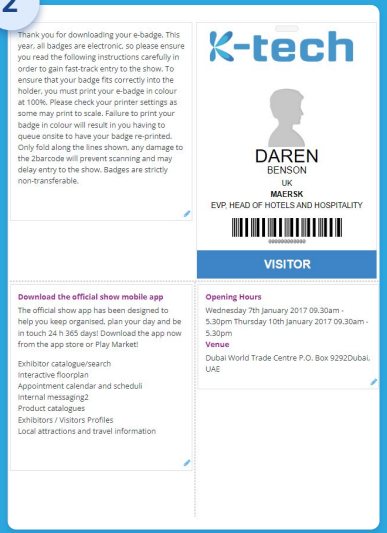


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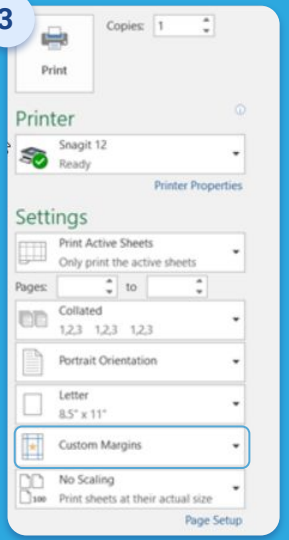


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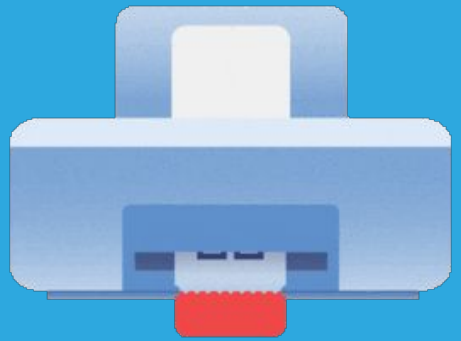

# Print Badge FAQ

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1. **How do I include my logo on the front of the badge?**

   Please include it within the Background image

2. **How do I include Sponsor logos?**

   Please include them within the Background image (front) or on the other sides of the badge via the editor.

3. **How do I adjust my margins so that the text doesn’t reach the borders?**

   In the editor, please use the “DIV” tool to create a container for your text and images, and in “Styles” set the margin to 10 pixels.

4. **How do I make sure that the result is a faithful representation of the design?**

   Please use the preview and print your badge on the printer that will be used onsite. The margins can be adjusted by using “custom margins” in your print settings.

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# DIGITAL BADGE

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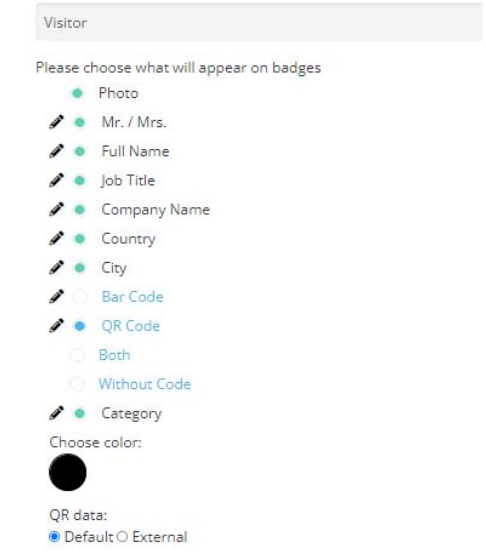
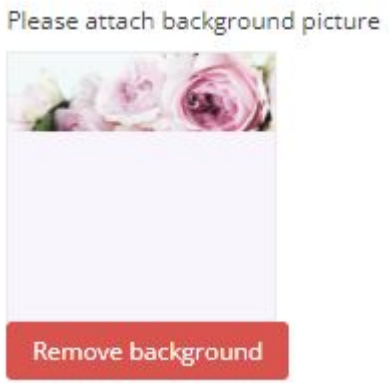
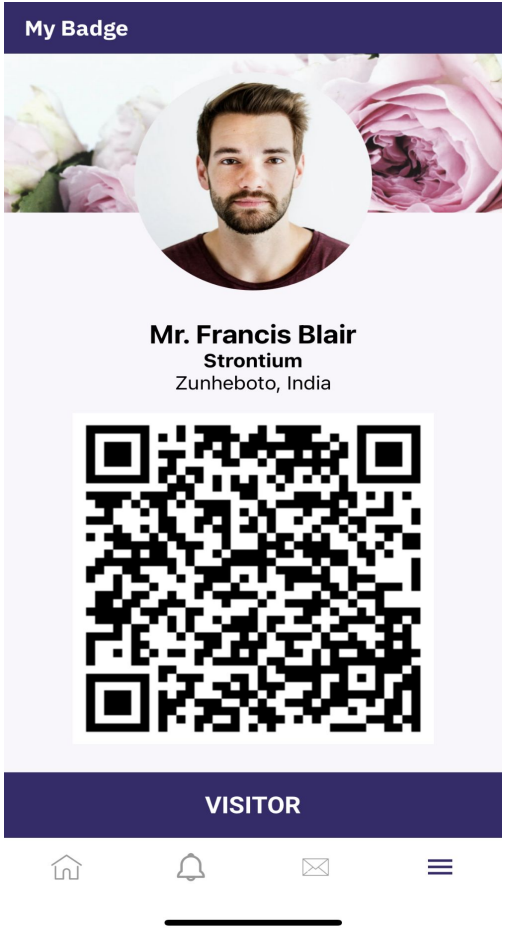
# 2. Digital Badge

# 1. Designing the digital badge

**A digital version of the badge is available for the organiser to present within an email campaign and within the mobile app.**
**This design is simpler than the print badge, with only 1 side.**
To design it, go to Registration settings > Badges > Digital Badges and select the category from the drop-down and then click on the radio button fields that should appear on the badge (Image 1).
You may attach the background image of dimension: 378 X 658 px (Image 2). Once designed, the digital badge would look something as the Image 3 when we go to the event application.
The visitors and exhibitors can scan the badges to capture the leads.



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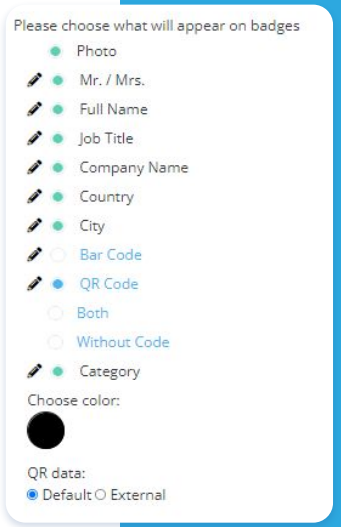


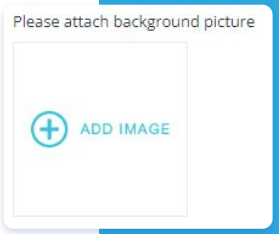


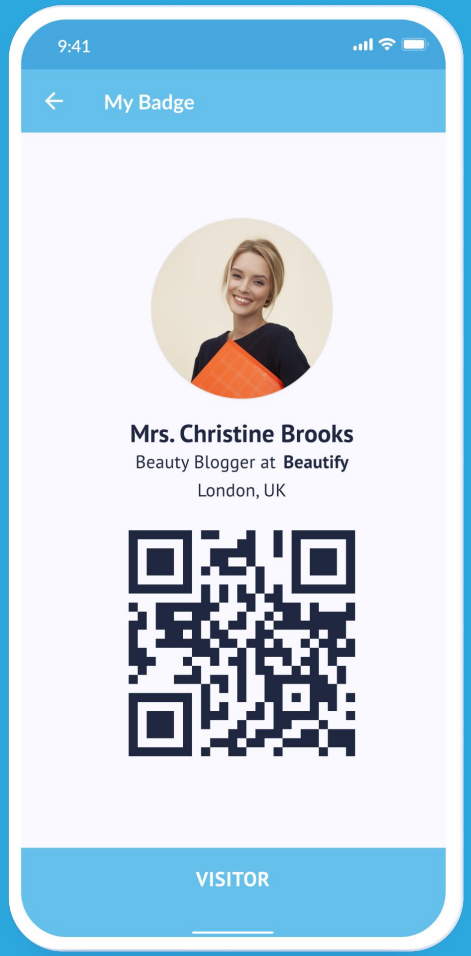

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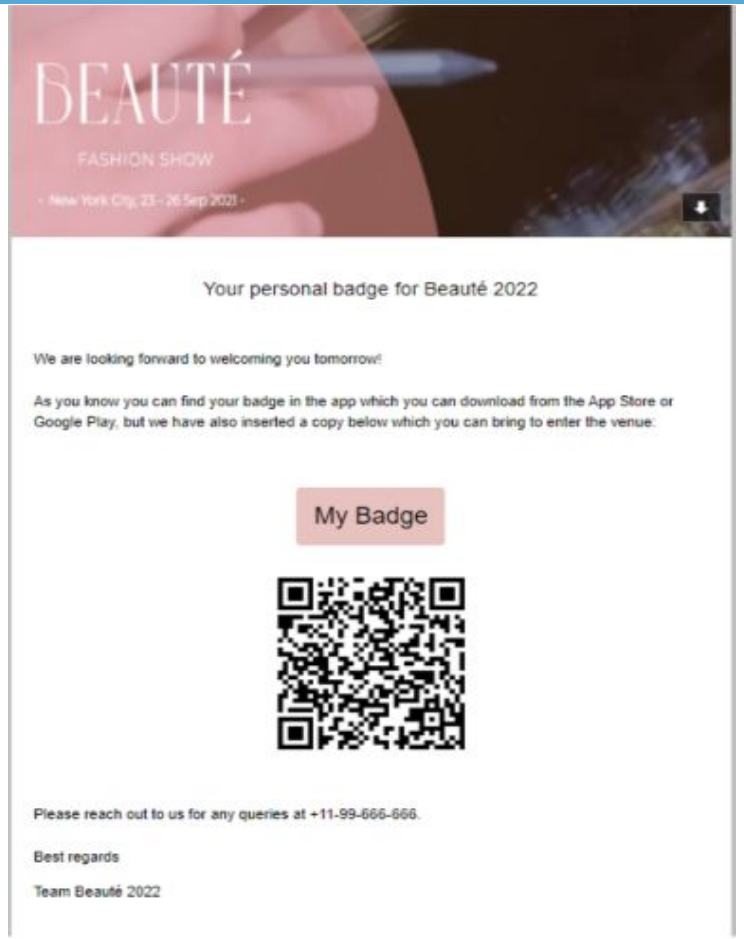
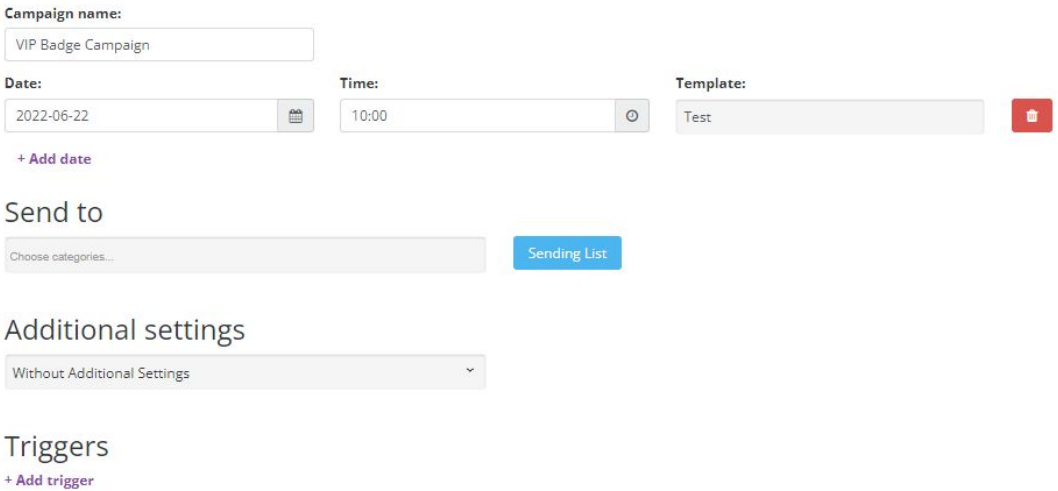
# 3. Sending your badges

# SENDING YOUR BADGES

# Managing Badge Campaigns




**We have an option to send the badges with the help of marketing campaign on the platform.**
**You can include the QR itself or the link to print the Badge.**

The first step is to create an email under Marketing>Email Sender>Email Templates> Add New Template. Then create the campaign, click on Marketing>Campaigns>New Campaign and enter the details.
Note- You must include one or both the variables for the QR code and barcode.
For QR code- {BADGE_QR_CODE}
For Barcode- {BADGE_BARCODE}
For Printing a Badge- {PRINT_BADGE_LINK}

# MANAGING BADGE CAMPAIGNS

**We have an option to send the badges with the help of marketing campaign on the platform.**

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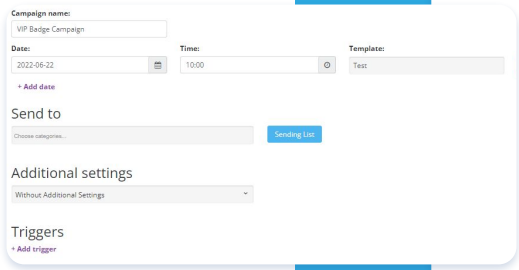

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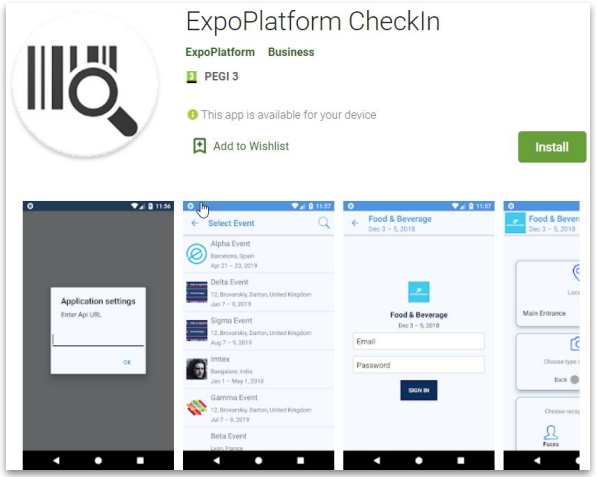
# 4. Check-in app

# CHECK-IN APP

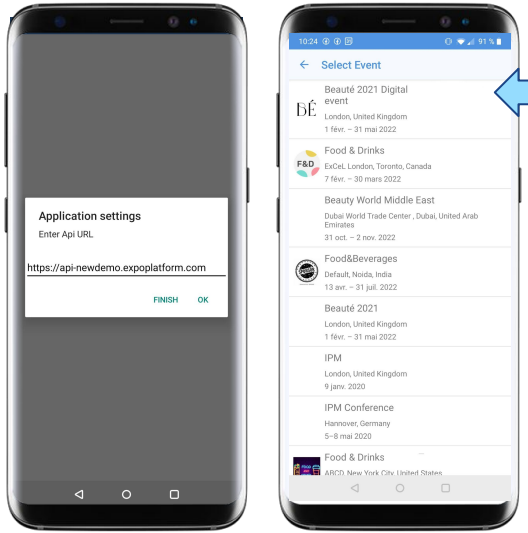
# 1. How to access your app?

**1. Please download and install the ExPoplatform CheckIn app** available on:

Google Play store
App Store




2. Once you open it, you will be asked to enter your **API url**. This url can be found in your browser, when you are connected to ExpoPlatform as an admin. Copy the url until .com:




3. Select your Event from the list and log in by using your **Admin credentials**

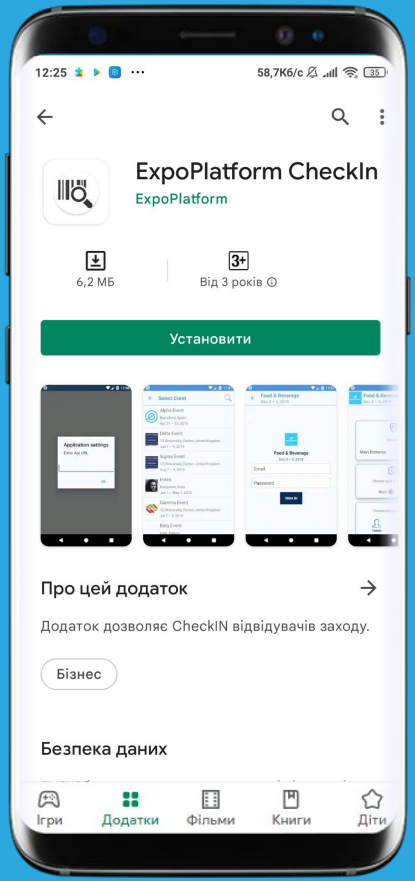
# HOW TO ACCESS YOUR APP?

1. Please download and install the **ExpoPlatform Check-In app** available on

App Store  Google Play store

**IMPORTANT NOTE:**
Checkin App only supports EP barcodes

App Store




Google Play store

# HOW TO ACCESS YOUR APP?

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https://api-newdemo.expoplatform.com/admin/general/edit

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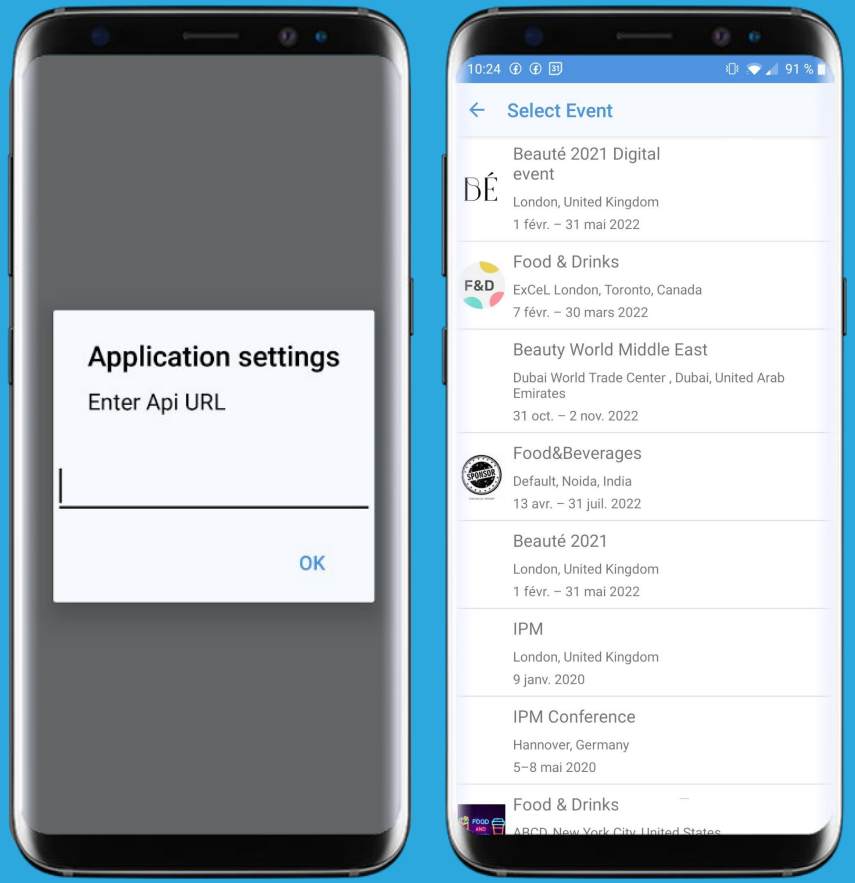


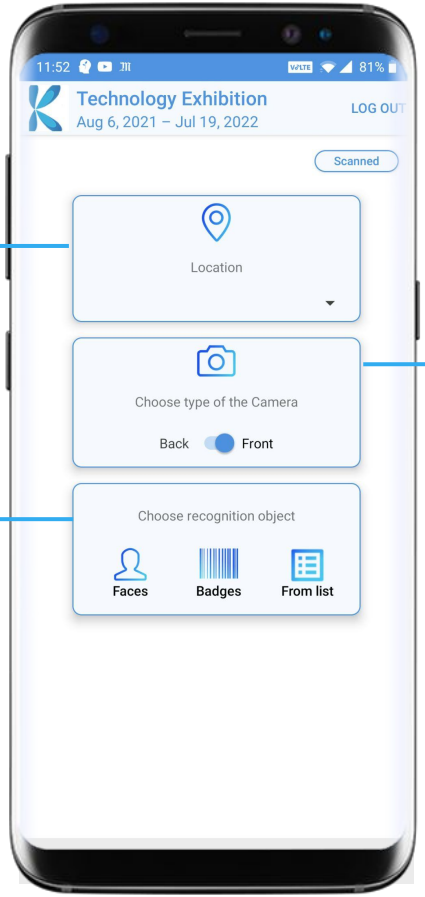
# 2. How to scan?

**1. Select the location where you are scanning can from.**

The locations which are entered in the floorplan module will show up in this drop down.
This location information will be listed in your scan report.

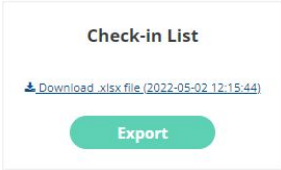
**3. Choose the object to scan**

- **Faces**: available when integrating with a dedicated 3rd party. A PIN code is required.
- **Badges** (most common): You also get the option to manually enter the barcode.
- **From list:** you can search within the attendee list by name and email.




**2. Choose which camera to use**
(back is recommended)

**4. Download your scan report**
From Data / Import/Export / Check-in List




The report includes: ID, name, Date & time, Status and Zone (location). Dedicated tabs are available for the dates of your Event.

# HOW TO SCAN?

**1. Select the location where you are scanning from.**
The locations which are entered in the floorplan module will show up in this drop down. This location information will be listed in your scan report.

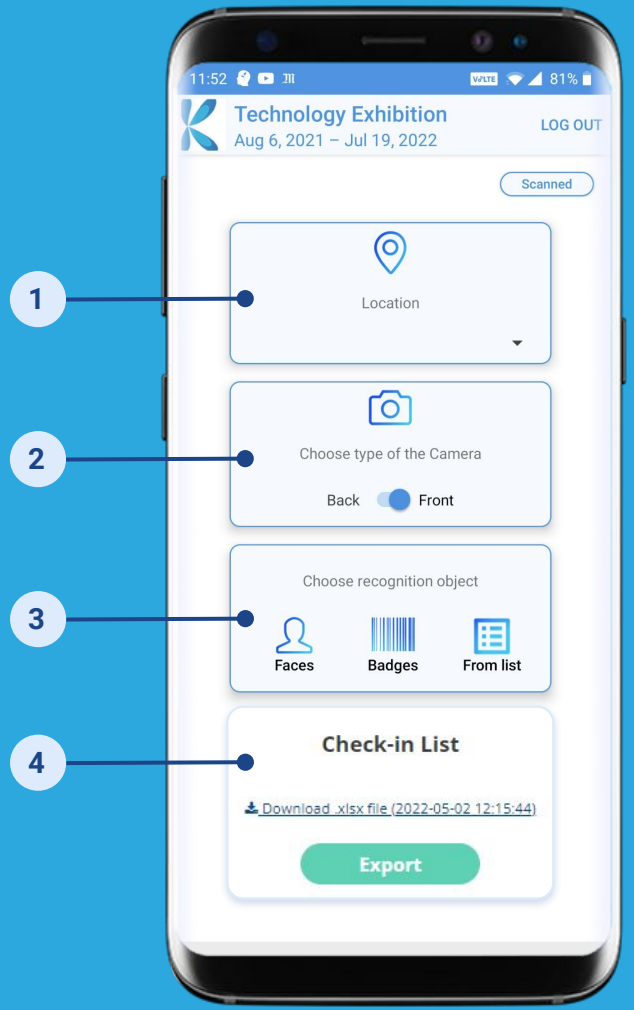
**2. Choose which camera to use** (back is recommended)

**3. Choose the object to scan**

- **Faces**: available when integrating with a dedicated 3rd party. A PIN code is required.
- **Badges** (most common): You also get the option to manually enter the barcode.
- **From list:** you can search within the attendee list by name and email.

**4. Download** your scan report From Data / Import/Export / Check-in List

The report includes: ID, name, Date & time, Status and Zone (location).
Dedicated tabs are available for the dates of your Event.

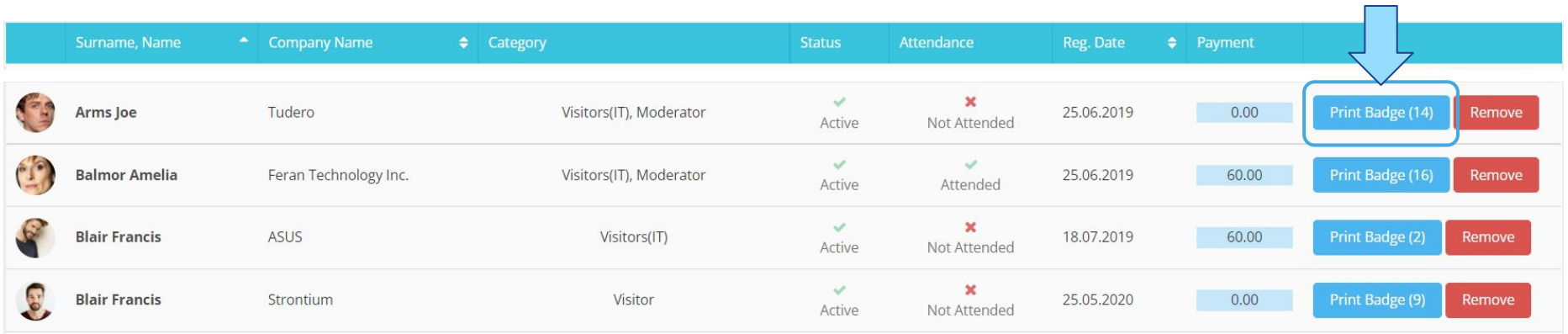


# 3. How to test your badges?

EXPOPLATFORM

**Go to Management / Participants and use the “Print Badge” button.**

You can use this to scan your registration tests first, and later, real participant badges.



# HOW TO TEST YOUR BADGES

EXPOPLATFORM

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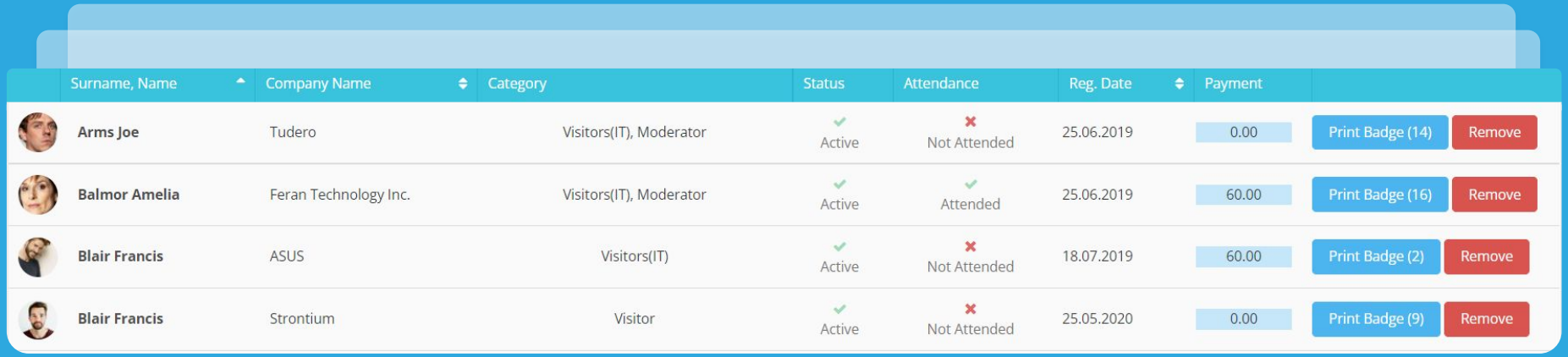
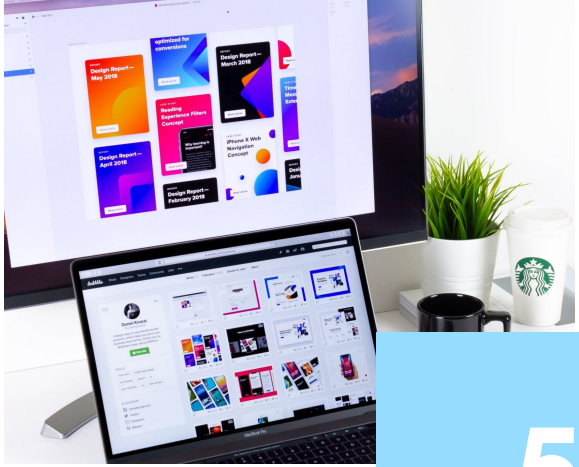


| | Surname, Name | Company Name | Category | Status | Attendance | Reg. Date | Payment | |
|---|---|---|---|---|---|---|---|---|
| | **Arms Joe** | Tudero | Visitors(IT), Moderator | Active | Not Attended | 25.06.2019 | 0.00 | Print Badge (14) Remove |
| | **Balmor Amelia** | Feran Technology Inc. | Visitors(IT), Moderator | Active | Attended | 25.06.2019 | 60.00 | Print Badge (16) Remove |
| | **Blair Francis** | ASUS | Visitors(IT) | Active | Not Attended | 18.07.2019 | 60.00 | Print Badge (2) Remove |
| | **Blair Francis** | Strontium | Visitor | Active | Not Attended | 25.05.2020 | 0.00 | Print Badge (9) Remove |

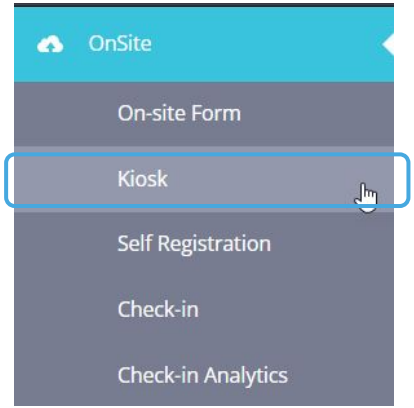
EXPOPLATFORM



# 5. Kiosk mode

# KIOSK MODE

# 1. What is Kiosk Mode?




**Kiosk Mode allows your registered attendees to print out their badges onsite.**

**You can also use it for self-registration of attendees onsite.**

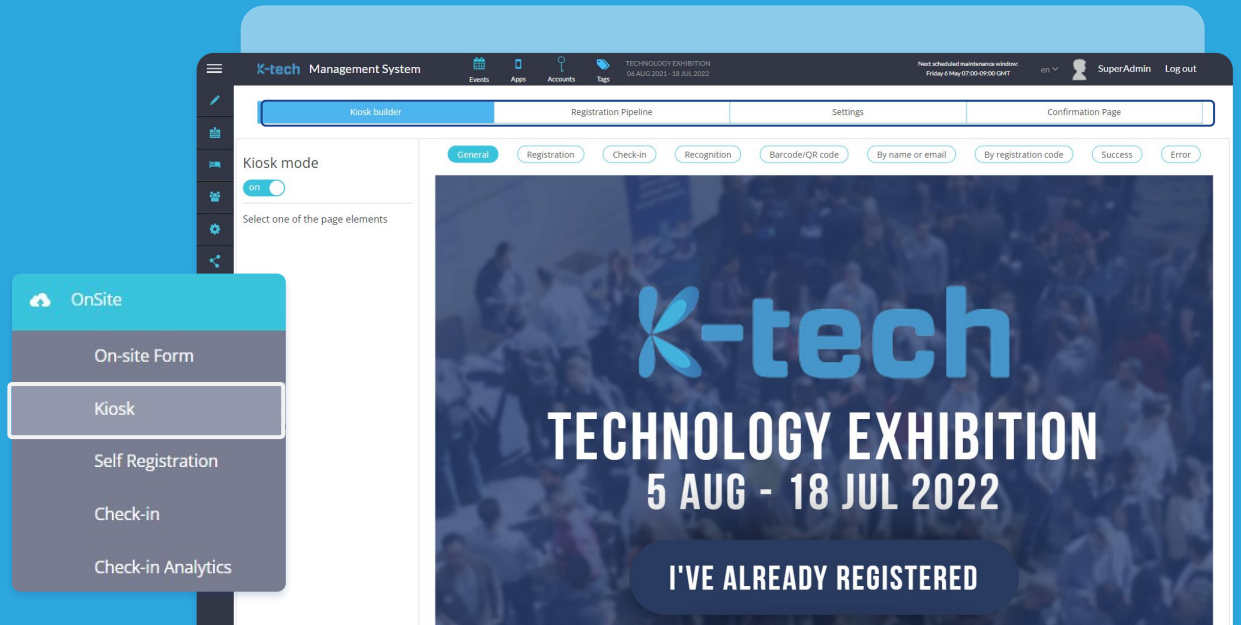
The setup consists in the 4 steps below.

Prior to setting up the “Kiosk Builder”, it is recommended to achieve “Settings”, “Registration Pipeline” and “Confirmation Page” first:

# WHAT IS KIOSK MODE?

EXPOPLATFORM

Kiosk Mode allows your registered attendees to print out their badges onsite.You can also use it for self-registration of attendees onsite. The setup consists in the 4 steps below. Prior to setting up the **“Kiosk Builder”**, it is recommended to achieve **“Settings”**, **“Registration Pipeline”** and **“Confirmation Page”** first:

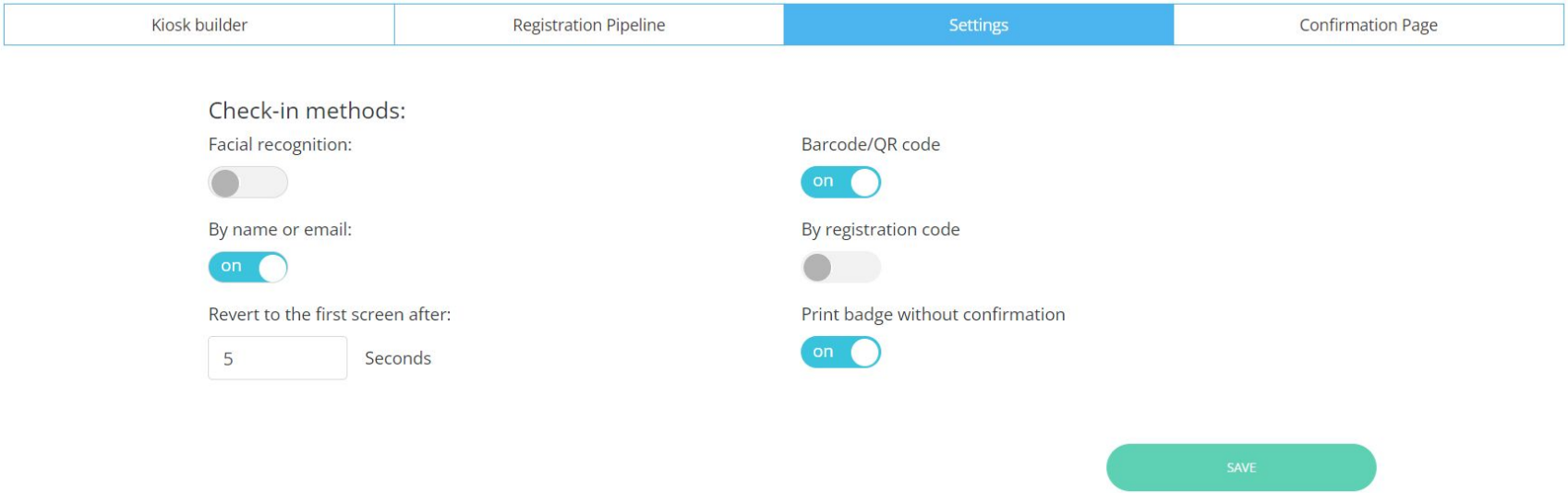


# 2. Settings

This tab contains the list of possible Check-in methods that you may activate according to your needs:

- **Facial recognition**
- **Barcode/QR code**
- **By name or email**
- **By registration code**

You can also set a **timer** to revert to the first screen after a period of inactivity to get the screen refreshed for the next user.
Finally , you may also enable the possibility for visitors to **print out their badges without confirmation** from your side:



# SETTINGS

EXPOPLATFORM

This tab contains the list of possible Check-in methods that you may activate according to your needs:

- **Facial recognition**
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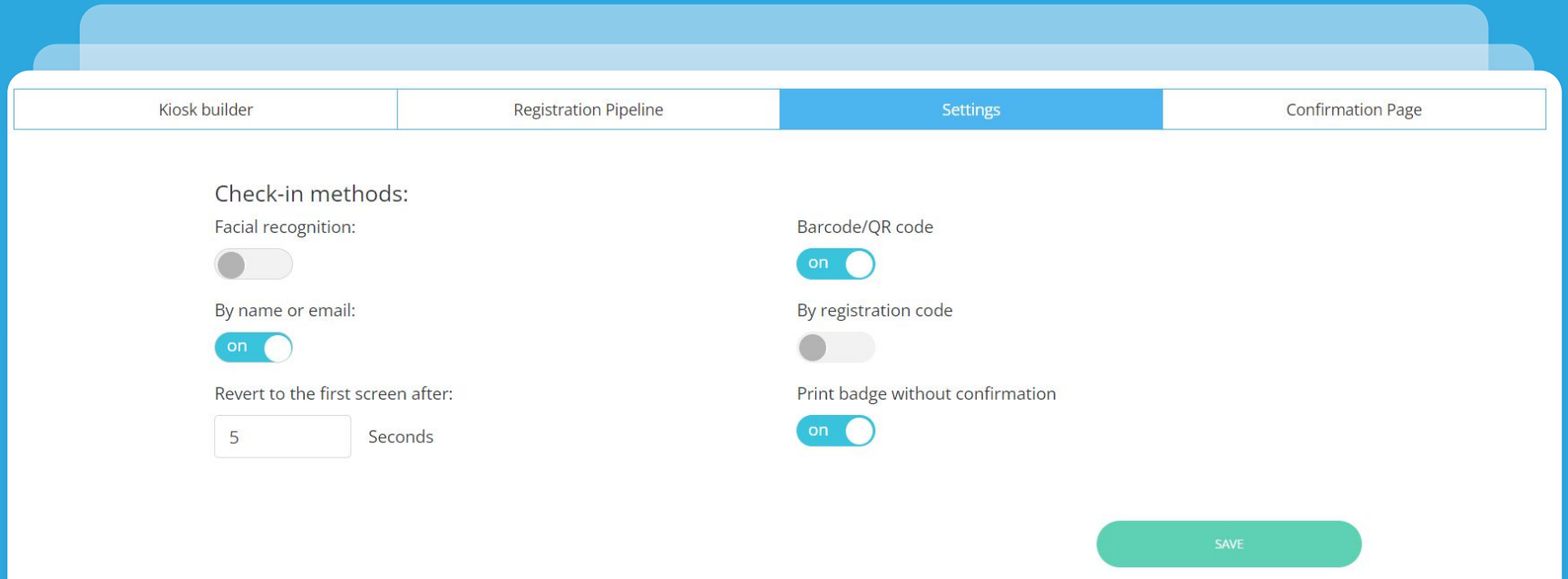
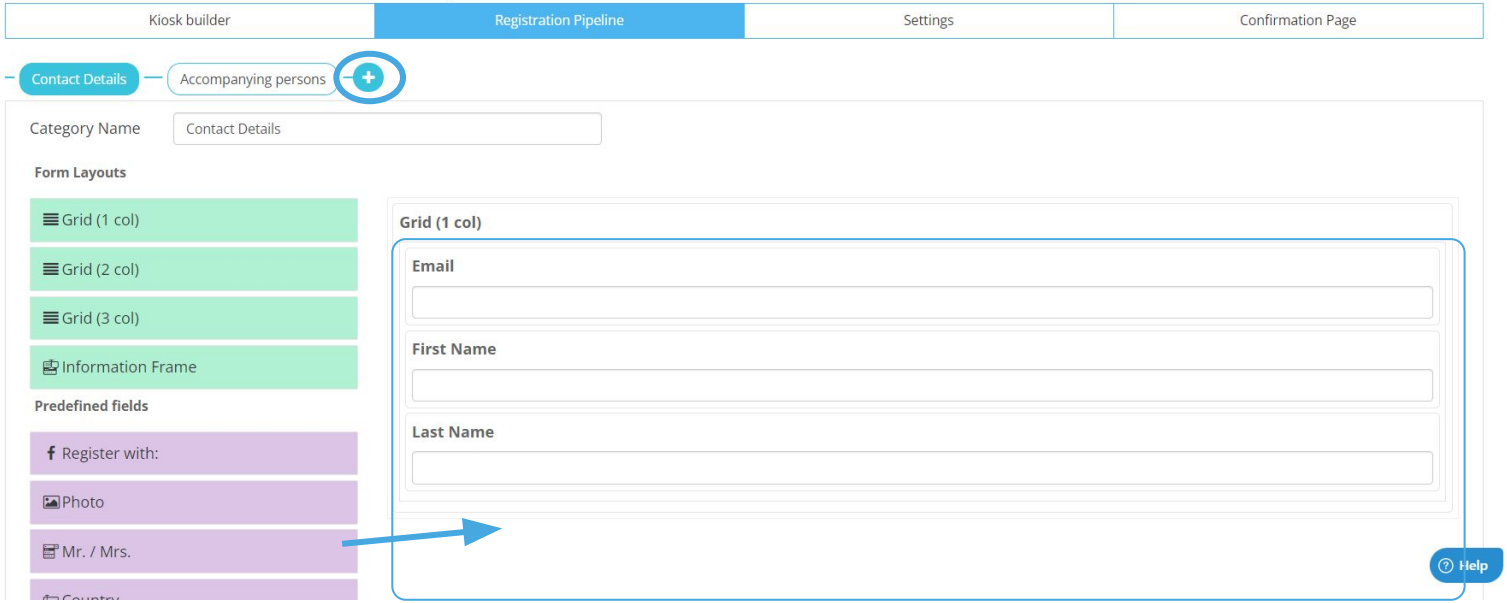


# 3. Registration Pipeline

If you are using the Kiosk Mode to register people onsite, the registration pipeline has a large collection of predefined fields to offer to build up your form.
All fields can be renamed in the editor.

**Please note that First name, Last name, and email** fields should always be used since they will appear on the badge.

- You can add any question from your registration, by drag and drop (eg. activities and areas of interest).
- You can also add additional steps if needed by clicking on the “+” icon.



# REGISTRATION PIPELINE

EXPOPLATFORM

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You can add any question from your registration, by drag and drop (eg. activities and areas of interest).

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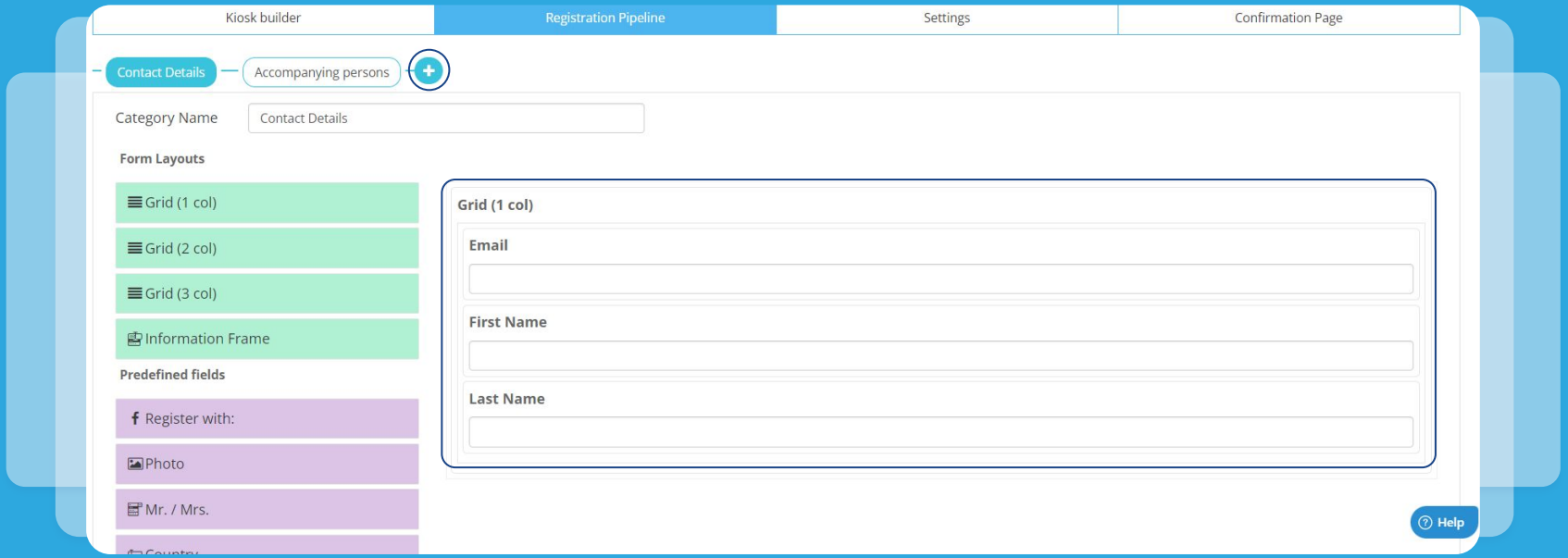
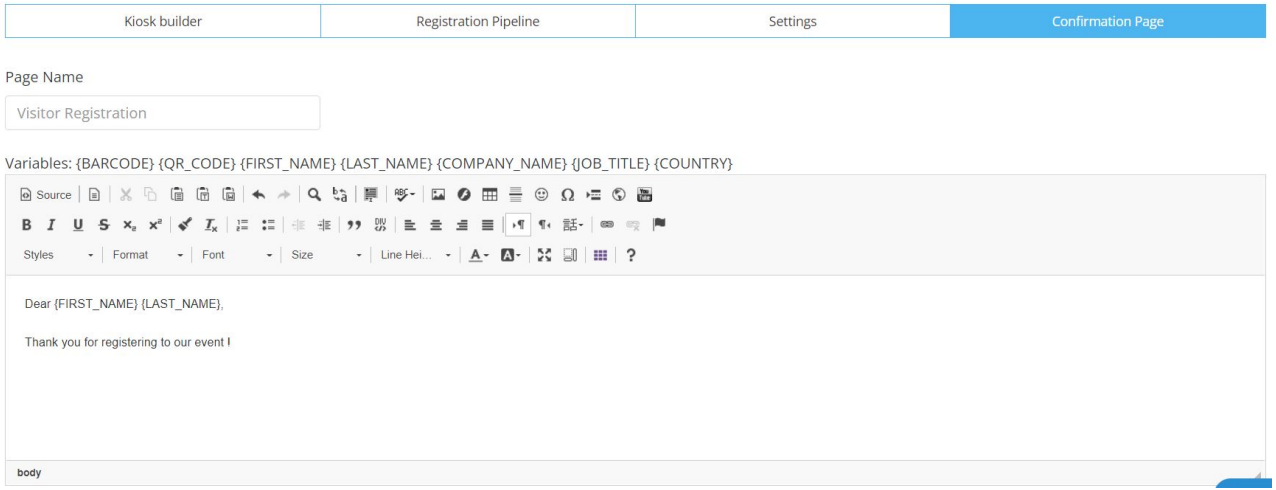


# 4. Confirmation page

EXPOPLATFORM

On this tab you can set your custom Thank you message to display at the end of the registration pipeline.
Variables like first name and last name are available if you would like to personalize your message.



# CONFIRMATION PAGE

EXPOPLATFORM

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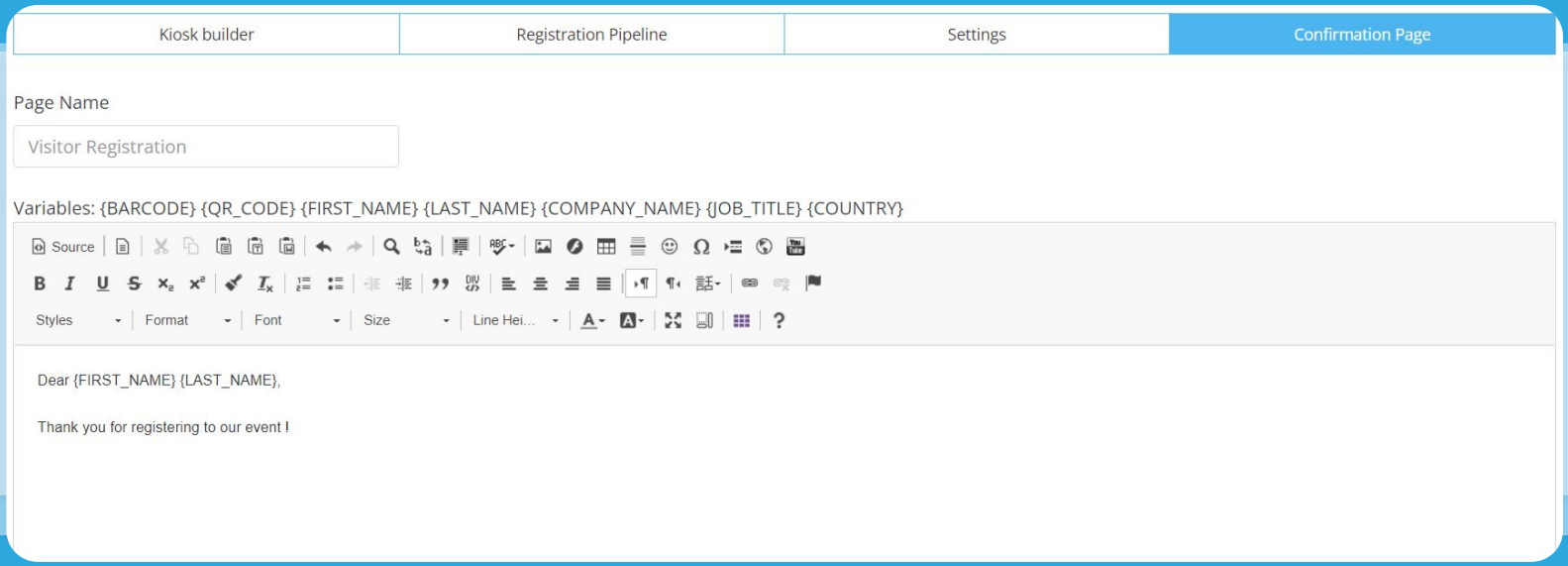
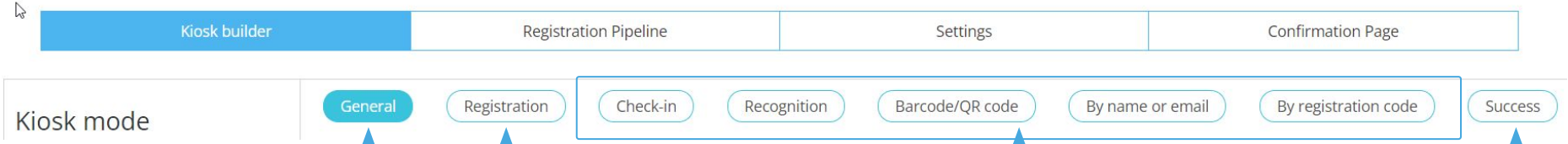


# 5. Kiosk builder

The Kiosk Builder allows you to build the look and feel of your Kiosk, step by step:




**1.** “General” holds the Welcome screen that will be displayed + call to action.

**2.** “Registration” contains your “Registration Pipeline”. You can upload your background image and visual assets.

**3.** The 5 next tabs are the Check-in screens, depending on what options you have chosen in Settings

**4.** The last tab is your Success page which will be displayed last.

# KIOSK BUILDER

EXPOPLATFORM

The Kiosk Builder allows you to build the look and feel of your Kiosk, step by step:

**1. “General” holds the Welcome screen that will be displayed + call to action.**

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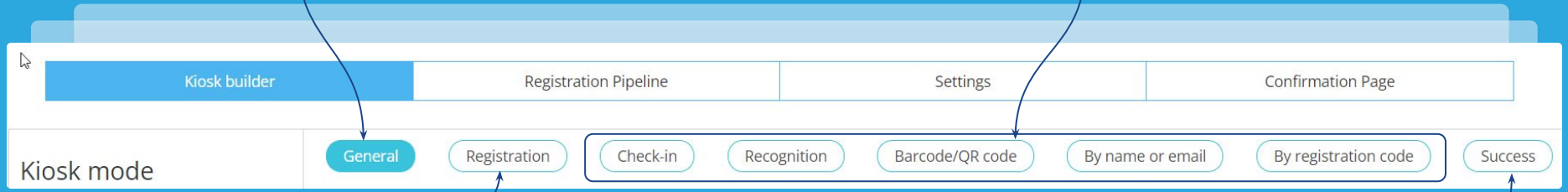
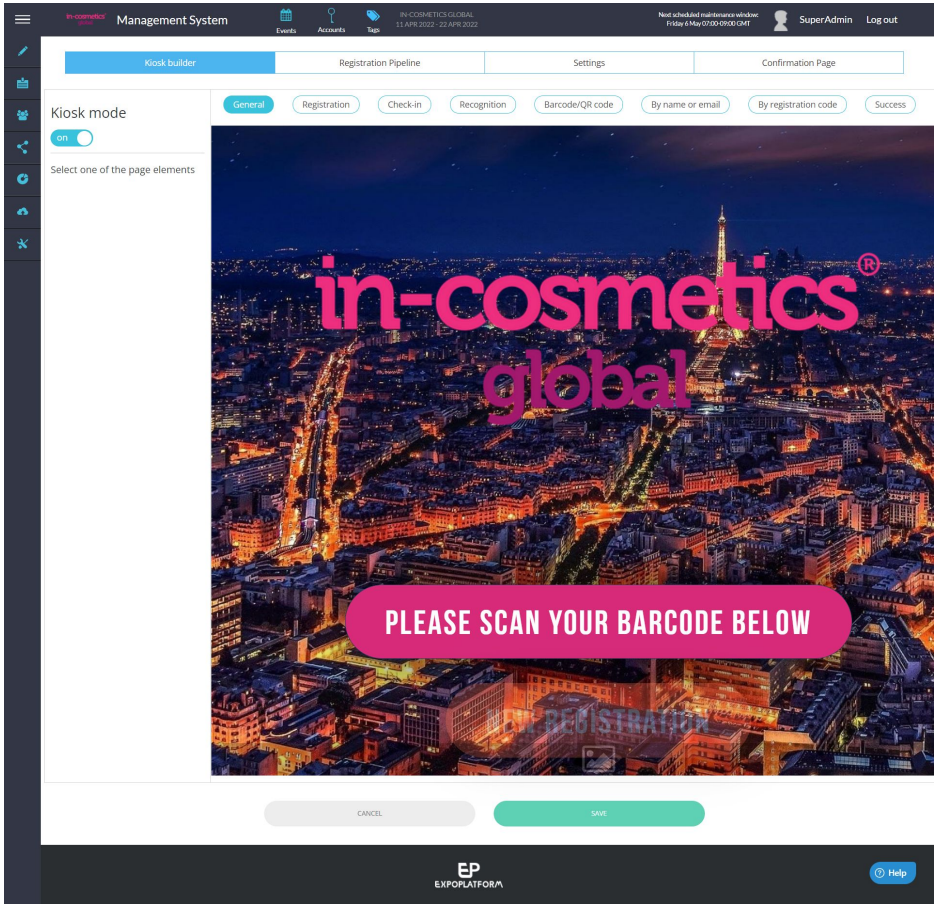


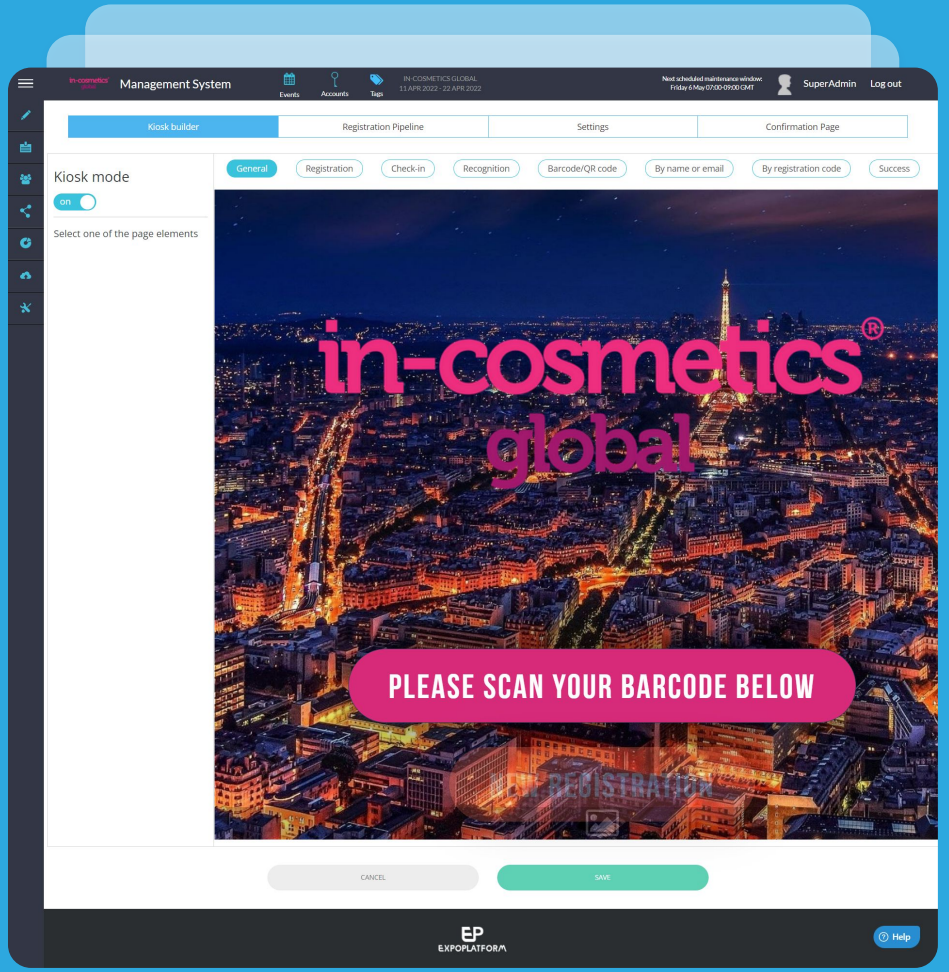

**2. “Registration” contains your “Registration Pipeline”. You can upload your background image and visual assets.**

**4. The last tab is your Success page which will be displayed last.**

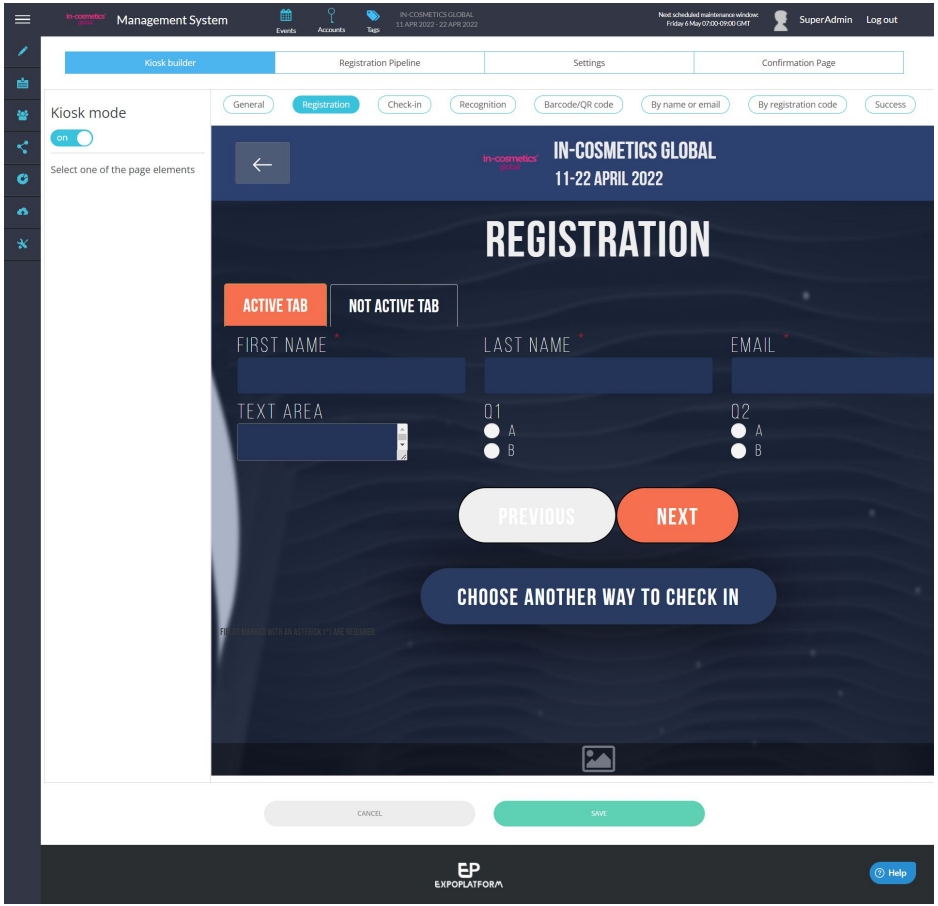
# 4.1. Kiosk page example: “General”



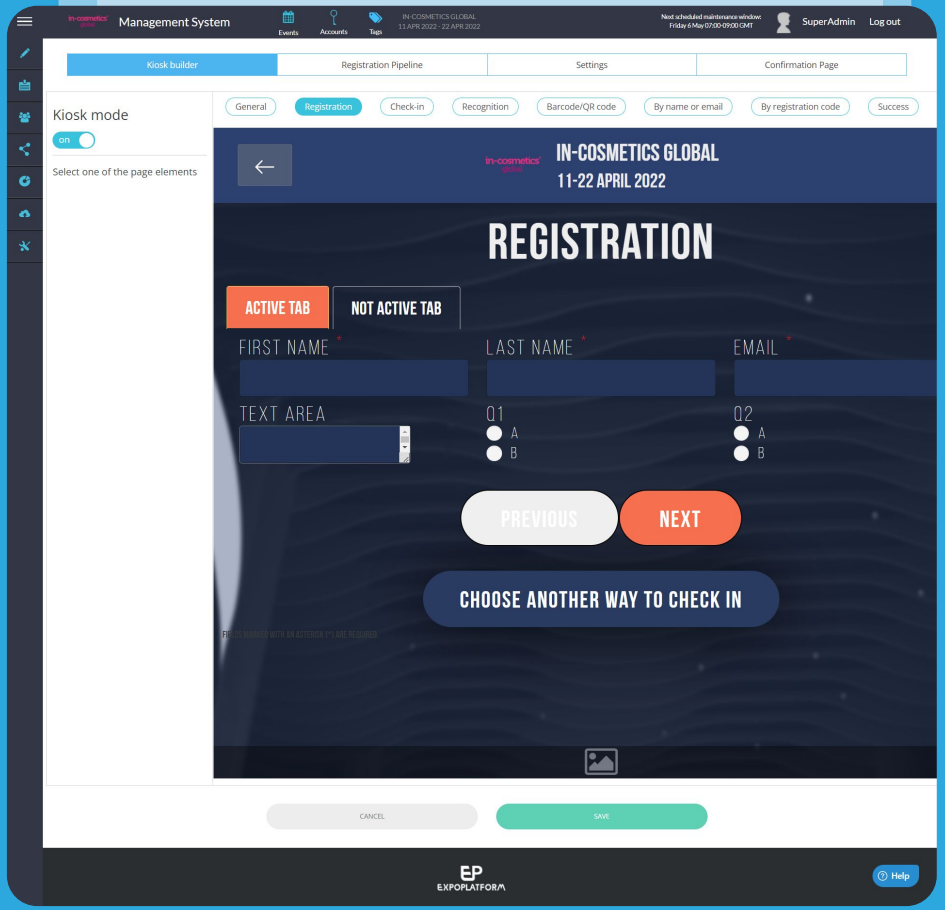
# KIOSK PAGE EXAMPLE: “GENERAL”



# 4.2. Kiosk page example: “Registration”

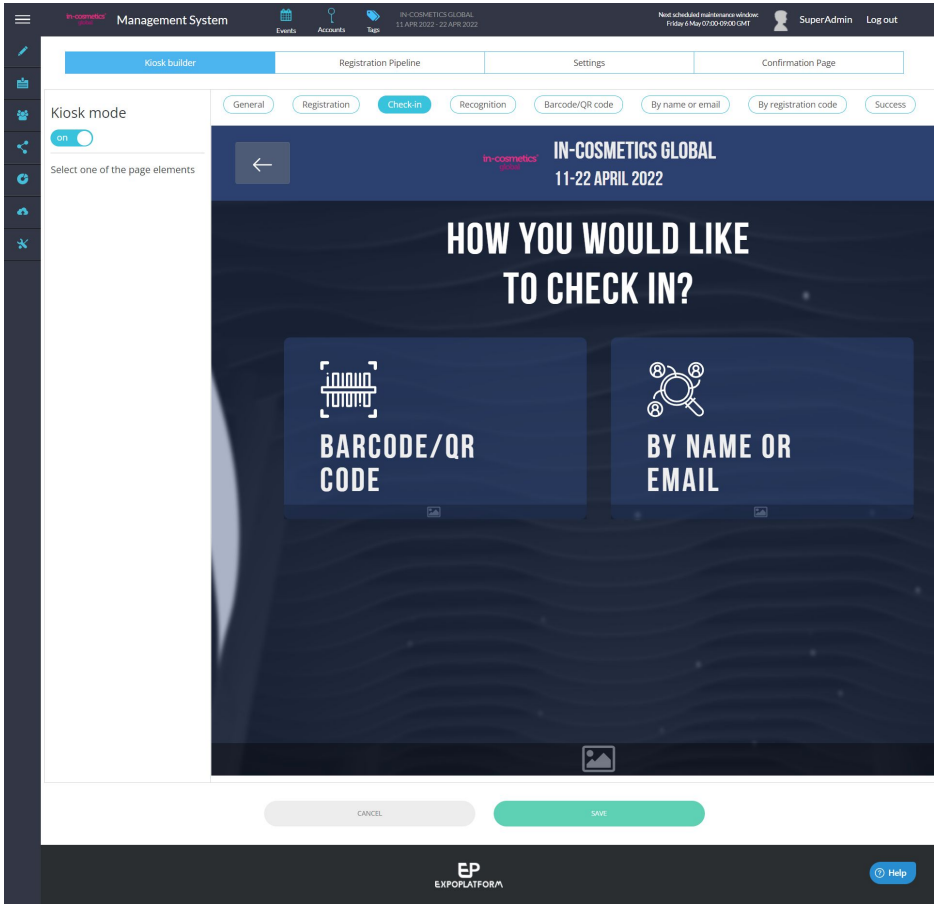


# KIOSK PAGE EXAMPLE: “REGISTRATION”

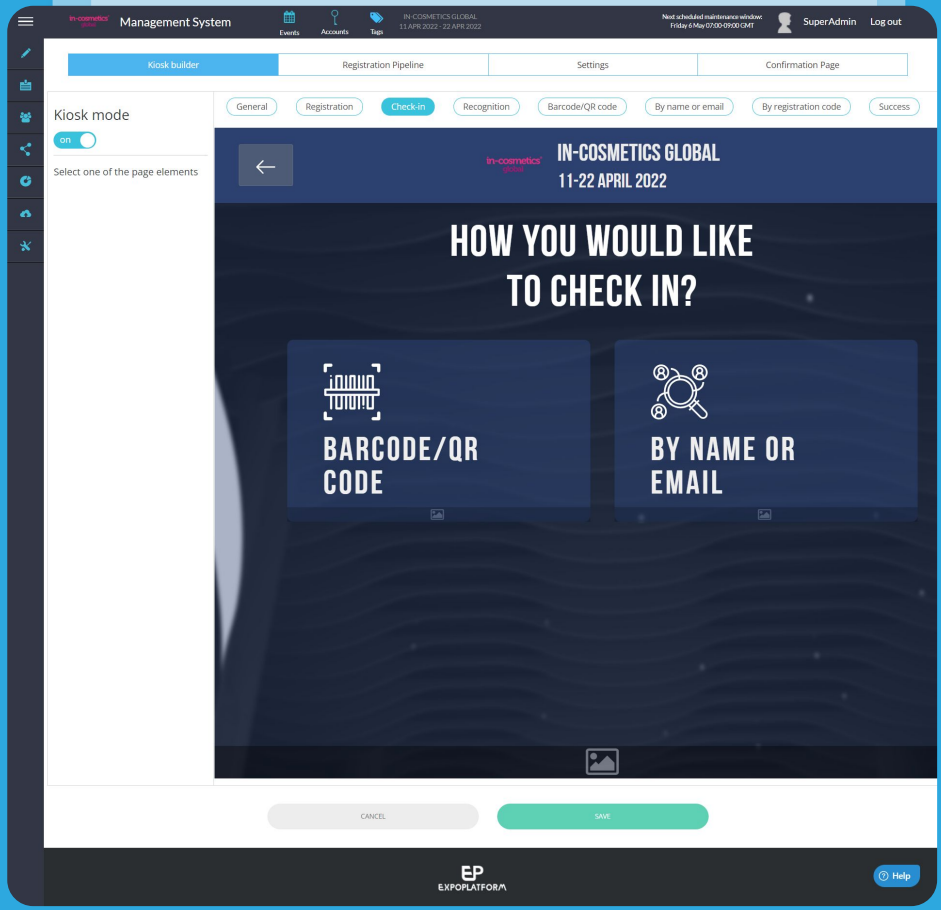



**EXPOPLATFORM** | Badge Design & Onsite Check-In

# 4.3. Kiosk page example: “Check-in”

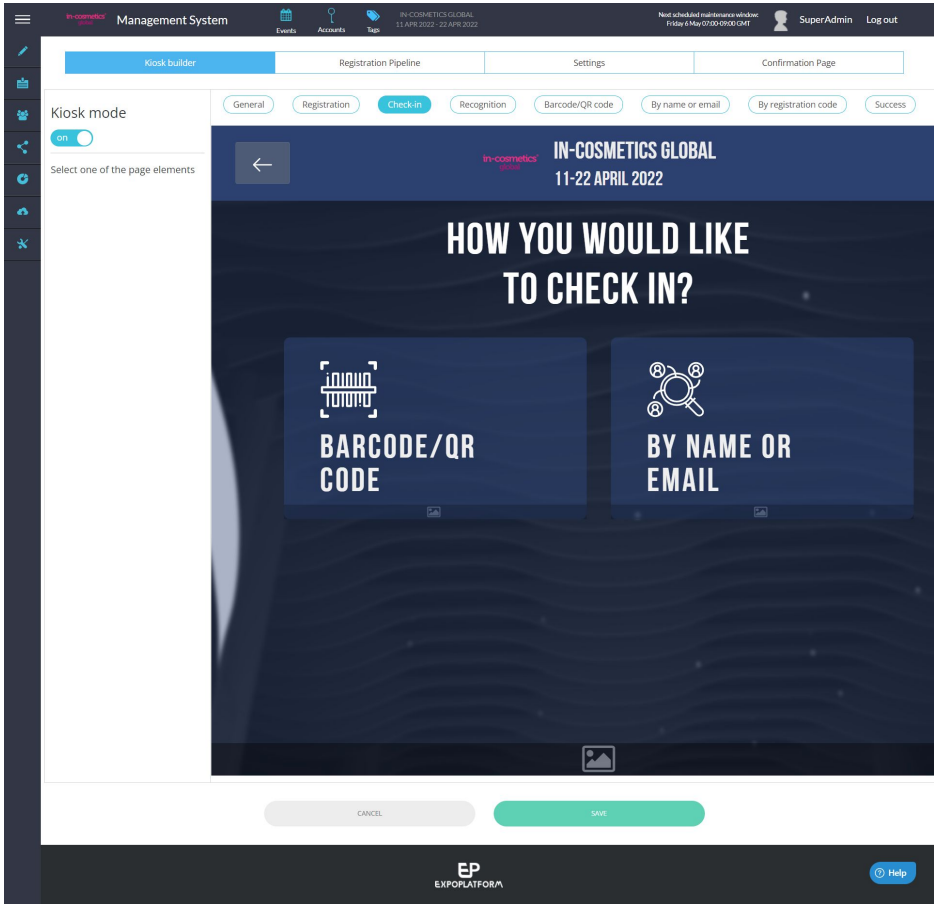


# KIOSK PAGE EXAMPLE: “CHECK-IN”

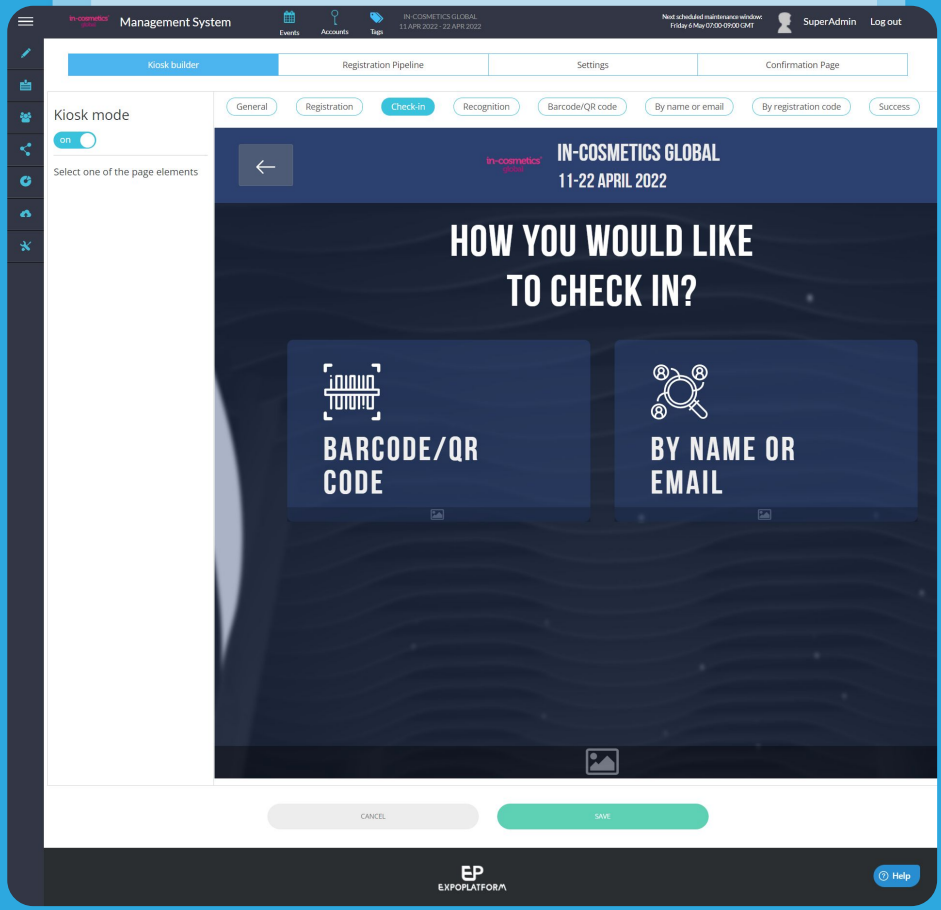



**EXPOPLATFORM** | Badge Design & Onsite Check-In

# 4.4. Kiosk page example: “Recognition”



# KIOSK PAGE EXAMPLE: “RECOGNITION”



# 5. Testing your Kiosk

You can generate the url of your Kiosk by taking the url of your event and adding **/onsite/index** at the end.

Example : https://beaute-clone-1636708420-newdemo.expoplatform.com/**onsite/index**

# TESTING YOUR KIOSK

You can generate the url of your Kiosk by taking the url of your event and adding **/onsite/index** at the end.

**Example :**

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EXPOPLATFORM

# Thank you!