

# Emma Reference Guide

## Check in assistance



### How to check-in a guest (no E-Ticket)

1. Go to the Microsite > **Login and go to Your Account > Admin Dash.**
  - The default filter is always “**Not Attended**” so that the list gets shorter with each guest you have already checked in - you will see the number of guests not checked in yet at the top left corner
  - You can change the filter to **All guests** or **Checked In** guests to see guest numbers
  - You are also able to filter by ticket name (for example if you are checking in only VIP reception tickets at this time)
2. **Search** the guest’s name and either select the edit button or check the guest in.
  - If you cannot find the guest they are likely a table guest or guest of a host and we didn’t have their name. You can search by host name or company name and Guest profiles will appear, with the correct host name. Click into that profile and add the guest name and details.
3. If there is missing information like a mobile or credit card select edit. Enter any missing details like name, mobile or bidder number.
4. Click **Add card** and swipe or manually enter a credit card, follow prompts if necessary.
5. Click **Save and check in.**
  - \*You will be automatically taken back to the admin dash screen to check the next person in.

### How to check in a Guest with an E-Ticket

1. Go to the Microsite > **Login and go to Your Account > Admin Dash.**
2. Click on the **Scan** button and **Allow** your device to use the camera for it
3. Point your camera at the **QR code** and the system will automatically scan it
4. Once it's scanned click **Scan next**
  - \*The screen will show in green when the guest has been checked in and will show their name, ticket name, host name, and table number
  - \*\*The screen will show in red if the guest has been already checked in - this is a security measure to keep guests from sharing their tickets with anyone who is not invited to the event

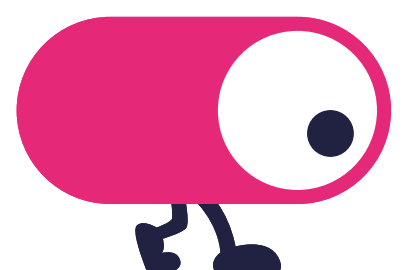
### How to add a guest

1. Go to Microsite > **Login and go to Your Account > Admin Dash > Add guest.**
2. Add guest details here, and also select what type of ticket they are purchasing if they still need to buy a ticket.
3. Click **Add guest** button.
4. **Search for the guest** again under admin dash and then add their card details if applicable and click save and check in. If not entering in card details you may just click the check in button if you have all of their information.

### Re-setting a guest’s password

If your guest has trouble re-setting their password or they have forgotten it at the event, you can easily re-set it for them following these steps:

1. Go to the **Admin Side** of the Emma Platform (only admin credentials can do this) **Guests > Overview**
2. **Search** for the guest name
3. Click on the ‘...’ **button** and select the Edit button
4. Input a **new password** for them in the System Password field
  - Top tip: keep it simple and easy for guests to use and remember (e.g. 123456)
5. Click **Save**, and let the guest know what their new password is
  - They can change it in their ‘Your Account’ section once they have logged back into their account



# Bidding assistance

## How to place a silent/live bid or add a raffle/buy it now or donation for a guest (must have admin login details)

1. Go to **Activity**
2. Click on **Add activity**
3. Type/choose the guest in **Guest** field
  - If the guest doesn't exist on the system yet, simply click on **Add new guest**, complete their First Name, Last Name and Email > **click Add**
4. **Click on the relevant activity** (e.g. + Bid/Buy Now/Pledge/Raffle Ticket)
5. **Choose the correct item/raffle ticket or pledge option**
6. **Complete any other relevant/mandatory fields** (amount, price etc)
7. Click **Add > Add activity**

## Removing a bid or activity for a guest (must have admin login details)

1. Go to the admin side of Emma
2. **Activity** > search guest name
3. To the right of the guest name click on three dots and select **Retract** or **Void**
4. When asked for confirmation select **Retract again** and if asked to **Void** fill in the required details and select **Void** one more time.

## How to assist a guest checking out on their phone

1. All guests who have won an item, made a donation, or purchased a Buy it Now Item/Raffle ticket will receive a text either asking them to pay with the card on file or will let them know that their card will be charged.
2. Once payment is made, the guest will receive one final text message on their phone. The **Payment confirmation**, which will include a **hyperlink** that you will request them to click on.
3. The **hyperlink**, once opened, is their paid statement and also shows what items they have won or what items they have paid for.
4. If they arrive to check out and have not paid for their items, have them go to the last text message, which is the **prompt for payment** text. Have them click on the hyperlink, and it will open to the credit card capture screen.
5. If they have a card on file, have them select to use that card on file. If they want to change their card or do not have a card on file, they can enter this information at that time.

## How to assist a guest who is NOT paying with a credit card and is making an offline payment instead (must have admin login details)

1. Go to the admin side of Emma. **Payments > Guests**
2. **Filter** by Unpaid (filter icon on the right)
3. **Search** for the guest by name
4. Click the **three dots** on the row of the guest's name and click **Pay**
5. Click **Add manual payment**
6. Add in a **Payment Reference** (e.g. Paid by BACS) and select a **Payment Method** (toggle on disable communication if you would prefer the guest not be notified that their payment was confirmed)
7. Click **Add payment**

