

Bidstation Event Night Cheat Sheet

Registration goal is to try to have all attendees save a card on file with ExpressPay so they can skip checkout payment lines at the end of the event.

Install and setup apps on iPhones/iPads:

1. Square POS – app store.
 - a. Install and login with organization’s Square account credentials. [add Square device code or email and password]
 - b. Open Square POS. Tap the menu to open settings, tap signature and receipt, select never collect signatures. Also ensure that Skip Receipt is turned off. Go back to settings.
 - c. Tap Customer Management and make sure all options are turned on.
 - d. Exit settings, now Square is ready to go.

2. Bidstation – via App Store

- a. <https://itunes.apple.com/us/app/bidstation/id1417775610?ls=1&mt=8>



- b. Input the Event Device Code in the app. Here is the one we’re using:

The Event Device Code is found in Bidstation Setup.

- c. It will confirm connecting to your event, click YES.
- d. Tap Check In Check Out to view the attendee list and to start checking in ExpressPay bidders (instructions for this below).

After apps are set up, train cashiers on how to check in guests. Create test attendees in Bidstation to allow cashiers to practice check-in.

Cashier training:

Cashiers will be tapping swipe to add a card on file at check-in (ExpressPay). They will ask the bidder for their card with confidence, to ensure most of your guests take advantage of ExpressPay.

1. To save a card on file (ExpressPay)
 - a. Tap to open an attendee profile and tap Swipe to start.
 - b. App will switch to Square POS to process the initial payment of \$1.00. Swipe the card and Ignore the receipt options that will appear as the payment is automatically refunded.
 - c. **This is very important:** Tap the card on file icon near the top of the screen. It looks like this: 

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Do not tap New Sale before tapping the Card on File icon.

- d. Follow the card on file prompts, add billing ZIP for cardholders. When completed, confirmation will display and the next tap will return to the receipt options.
- e. Ignore the receipt options and tap New Sale to complete the Card-on-File steps and return to Bidstation.
- f. The “Please Wait” spinner will be displayed for a few seconds. Check that it says “card on file added successfully”. If it does, the bidder is now checked in with ExpressPay.
- g. If the confirmation message reports “card was not successfully saved with this attendee profile”, repeat the process.

Remember: The \$1.00 charge is automatically refunded after check-in.

Tap the back arrow to get back to the attendee list.

To add a new bidder:

If you have an unregistered guest to add, Tap the +Bidder button at the top of the attendee list.



Name, email and bidder number are required. Other details may be added optionally to complete the bidder’s profile.

When ready, tap Save & Swipe (recommended) or Save and Skip Swipe, depending on whether the attendee is adding a card on file for ExpressPay or not.

Ask each cashier to practice the check-in steps to ensure they are comfortable with the process before guests arrive.

Create some sample guest names with bid numbers in a range outside of the ones used for your guests and instruct cashiers to use these for practice with their own credit card (\$1.00 fee is instantly refunded.)

Checkout steps:

Checkout is the same as check-in: it saves a card on file *first*, then processes the payment.

For any bidder who is providing a card at checkout for payment, simply follow the check-in card on file steps above. Once a card is saved for the bidder, the last 4 card numbers will appear on their profile and the button will change to display “Make Payment”. Tap Make Payment to process the amount showing on their profile. The amount may be changed before processing the payment.

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To replace a Card on File with a different card, open attendee profile and repeat the card on file process. You will be warned that the current card will be replaced.

Tap back arrow to return to the attendee screen.