

Event Night Quick Reference

QUICK REFERENCE FOR USING THE APP ON THE NIGHT OF THE EVENT. (FOR MORE DETAILED INSTRUCTIONS, CONSULT THE USER MANUAL, SECTION 18: *PAYMENTS AND USING THE BIDSTATION APP.*)

The goal at registration is to try to have all attendees **save a card on file** (ExpressPay) so they can skip checkout payment lines at the end of the event. It is completely secure (just an encrypted token is stored) and no payment will be taken if there is no amount owing. Saving a card simply allows guests to leave without paying if they do win an auction item, donate or buy something.

SETUP AND TRAINING

To set up the app:

Open the Bidstation software program on your computer. Click **Connect with Square** in the Setup screen and log in if you haven't already. Click the Start Sync button (bottom right in Setup screen) to generate the code for connecting the devices. Devices will only be able to connect if the Sync is running.

On the mobile devices, download the Bidstation app from the App store and enter the Event Device Code found in the Setup screen. Devices will only be able to connect while the Sync is running:

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



Cashier training:

After apps are set up, train cashiers on how to check in guests. Create some sample guests with bid numbers in a range outside of the ones used for your guests to allow cashiers to practice check-in. Cashiers will be tapping **Save Card** to add a card on file at check-in. They will ask the bidder for their card with confidence, to ensure most of your guests take advantage of ExpressPay (leaving without lining up).

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

Event Night Quick Reference

USING THE APP

1) To check in guests:

Tap **Check In Check Out** to view the Attendee list and check in bidders.

2) To Save a Card on File (ExpressPay), tap:

Check In Check Out → Biff Hooper → (confirm details and bidder number) → Save Card → Swipe card and follow prompts.

You will see a message saying *'Card on file added successfully'*. Tap the back arrow to return to the Attendee list and check in next guest.

3) To add a new bidder:

If you have an unregistered guest to add, tap **+Bidder** at the top of the Attendee list.



First name, last name, email and bidder number (bid#) are required. Other details may be added optionally to complete the bidder's profile.

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

4) Checkout steps:

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

For any bidder who is providing a card at checkout for payment, tap:

Check In Check Out → Biff Hooper → (confirm details and bidder number) → tap Payment → Tap Save Card → Swipe card and follow prompts to complete the Card-on-File process → tap Process Payment (optional*).

You will see a message saying *'Payment added successfully'* if you process the payment. Tap the back arrow to return to the Attendee list and check in next guest.

*You can also use the back button after saving the Card on File to return to the list of Attendees (and not tap **Process Payment**) if you don't want to process the payment right away. The card will be still be saved for processing later.

Process a Balance Owning any time for guests who have a Card Saved on File. Tap:

Check In Check Out → Biff Hooper → Make Payment → Process Payment.