User Manual

This is the user manual for Bidstation™.

Additional support and training resources can be found on our website at www.auctionzoom.com.

Information in this document is subject to change without notice and does not represent a commitment on the part of AuctionZoom™ Ltd. The software described in this document is furnished under an End User License Agreement (EULA) which may be viewed under the Help navigation menu in Bidstation™. The software may be used only in accordance with the terms of that agreement.

For demonstration purposes, this manual uses fictitious names; any similarities or references to an actual person or company are coincidental.

Every effort has been made to ensure that this documentation is complete and accurate. However, Bidstation may have changed between the time the document was prepared and when the product was released. These changes will not in any way interfere with your use of the product.

Table of Contents

1. Introduction 6

1.1. Basic Planning 6

1.2. Quick Start: Key Setup Steps for your Auction 7

1.3. What Is Bidstation? 13

1.4. Overview of Using Bidstation 13

1.5. What Is Saving Card On File? 14

2. Installing Bidstation and License Key Registration 14

2.1. Installing Bidstation 14

2.2. License Key Registration 16

3. Setting Up the Bidstation App 17

3.1. Download and Install App 17

3.2. Enable Square to Work with Bidstation 17

3.3. Enable the Bidstation App 17

3.4. Controlling access 18

3.5. Recommended flow for setting up the Bidstation app 18

4. Bidstation Setup and Database Instructions 19

4.1. Setup Window 19

4.2. Bidstation Setup Fields 19

4.3. Bidstation Setup: Database File Format 20

4.4. FILE/New Database 20

4.5. FILE/Open Database 21

4.6. Using Bidstation on a Network and Repairing a Damaged Database File 21

4.6.1. Using Bidstation on a Computer Network 21

4.6.2. Repairing a Damaged MS Access Database File 21

5. Menu Commands and View Windows 22

5.1. Navigation Menu 22

5.2. Menu Commands 23

5.3. Data Entry Windows 24

6. Administrative Functions (FILE Menu) 25

6.1. FILE/Export Data 25

6.2. FILE/Import Data 26

6.3. FILE/Create Documents 26

6.4. FILE/Cleanup 27

6.5. FILE/Backup 27

7. Importing, Entering and Exporting Data 28
7.1. Importing Data into Bidstation 28
7.2. Database Fields: ITEMS 29
7.3. Database Fields: ATTENDEES 31
7.4. Bidstation Data Import Templates 33
7.5. ATTENDEES Import Conventions 33
7.6. ITEMS Import Conventions 34
7.7. Exporting data 35
8. Entering data for ITEMS, ATTENDEES and WINNING BIDS 36
9. Entering ITEMS Data 36
9.1. Required vs. Optional Fields for Items Data 37
9.2. Items Functions 38
9.3. Generating ITEM Numbers 38
9.4. Creating ITEM Baskets 39
10. Entering ATTENDEES Data 39
10.1. Adding and Importing Attendees 39
10.2. Importing ATTENDEE List 41
10.3. ATTENDEES List Functions 42
10.4. Generating ATTENDEE Bidder Numbers 42
11. OTHER BIDS: Preparing Receipt Tags 43
11.1. How to Create Receipt Tags for OTHER BIDS 43
11.2. Required Conventions for Receipt Tags 44
12. Planning for Payments 44
12.1. Types of Payments 44
12.2. Saving Cards on File at Check-in (ExpressPay) 45
13. Finalizing Auction Preparations 46
13.1. Checklist 46
14. Preparing AUCTION DOCUMENTS 46
14.1. Types of Documents 46
14.2. Exporting Data from Bidstation for Document Preparation 47
14.3. Auction Document Templates 47
14.4. Creating Bid Sheets and Other Documents Using Bidstation Templates: Basic Procedure 50
14.5. Using Merge Document Filters to Segment Documents in Groups 51
14.5.1. Merge Document Filters Summary 52
14.6. Editing Within Final Documents Created from Templates (Word Merge Documents) 52

15. Preparing REPORTS 52
15.1. Types of Reports 52
15.2. Printing and Exporting Reports 53
15.3. ATTENDEE Reports 53
15.4. ITEM Reports 54
15.5. BASKET Report 54
15.6. BID (Purchase) Reports 54
15.7. PAYMENT Reports 56
15.8. Printing Reports: Before / During / After Event 57
15.9. Refresh Dashboard Button: 58
16. Preparing and Sending INVOICES 58
16.1. Types of Invoices 58
16.2. Creating Invoices 59
16.3. Invoice Distribution to Attendees 60
16.4. Reviewing Invoices for Payment Reconciliation 60
16.5. Archiving Invoices 61
16.6. Emailing Invoices 61
16.6.1. Email Setup 61
16.6.2. Email Setup Steps 62
16.6.3. Sending invoices via email to guests 62
17. Entering Bids at the Event 64
17.1. Entering Bids (The Clerking Process) 64
17.2. Entering WINNING BIDS 65
17.3. Entering OTHER BIDS 67
18. Payments and Using the Bidstation App 69
18.1. Checking in Guests and Saving a Card on File (ExpressPay) 70
18.2. Saving a Card on File: Step by Step Instructions 70
18.3. Checkout with a Credit Card (no card saved on file) 71
18.4. Process Payment for Balance Owing 71
18.5. Cash, Check and Split Payments 71
18.6. Changing Attendee Details and Adding Attendees: 72
18.7. Controlling Access 72
18.8. Troubleshooting for the Bidstation App at the Event: 72
18.9. The Checkout Process: 73
19. Processing Payments in a Batch After the Event 73
20. F.A.Q. 74

21. License Agreement..... 76

1. Introduction

1.1. Basic Planning

The basic elements of any silent auction event are:

People arrive for an event, you give them bidder numbers, and they use their bidder numbers to bid on items and make purchases. There may also be a live auction or other fundraising activities at the event. As the event organizer, you have to organize and keep track of all of this. Bidstation software maps onto these basic auction elements to make your job easier.

The essential steps for using Bidstation to organize and run a successful auction are:

- Entering all items into the software program and assigning them a unique item number.
- Entering all attendees into the software program and assigning them a unique bidder number.
- Preparing bid sheets for each item.
- Checking in Attendees at the auction and including payment information for them in the software.
- Entering winning bids, purchases and donations in the software and preparing final invoices.
- Collecting payment from any guests you don't have payment information for at checkout.
- Processing payments and confirming there are no balances owing.

This manual describes how to use Bidstation to help with the process of setting up, running and wrapping up your auction event.

Initial Planning Considerations:

Before adding Items and Attendees to Bidstation or preparing documents, some decisions you will need to make are:

Will attendees include Sponsor Level or Classification?
Make a list of descriptive words such as Gold/Silver/Bronze or Alumni.

Will items include categories?
If the silent auction is divided into booths or segments, use categories to distinguish areas (e.g. Red Segment, Art Segment, 9:00 pm Closing Segment, etc.).

How will you enter items and attendees?
One at a time data entry in Bidstation, or import from Excel (recommended)?
Will the custom fields be used for event-specific reporting or data lookup?

What documents and forms are needed for the auction and guests?
Will the Bidstation document templates be used or customized?

How will you communicate winning bids at the event?
Winning Bidder boards posted, or electronic boards?
Printed invoices picked up by or delivered to guests?

How will you distribute invoices?
By print or email, or both?
Before or after payments are reconciled and processed?

1.2. Quick Start: Key Setup Steps for your Auction

Set up your account and register event information

Open the Setup screen from the menu bar on the dashboard.

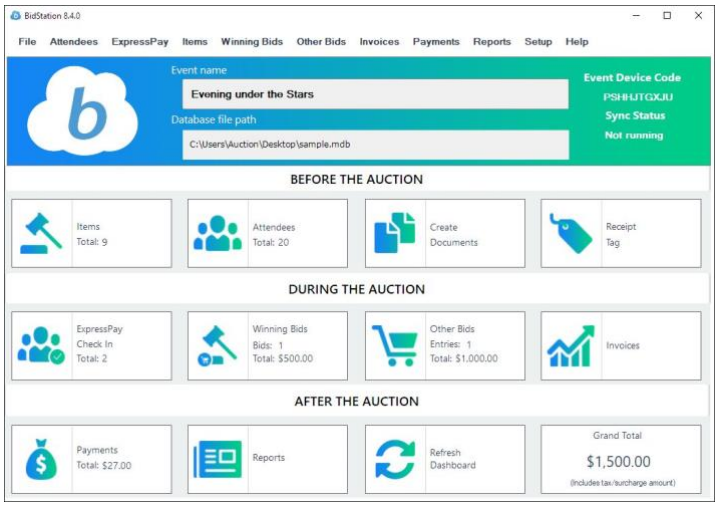


Figure 1 Dashboard

Fill in the Setup screen in the Navigation Menu with details about your organization (top left) and auction (bottom right). Include information that should appear on invoices.

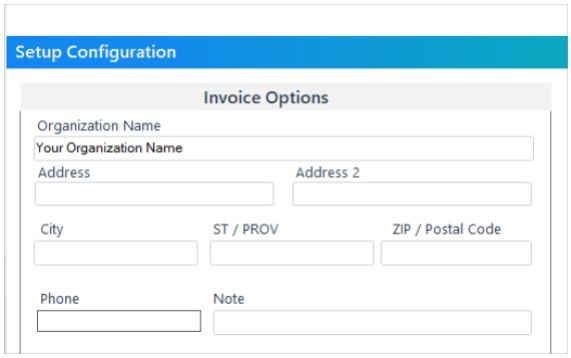


Figure 2 Setup Screen – Organization Details

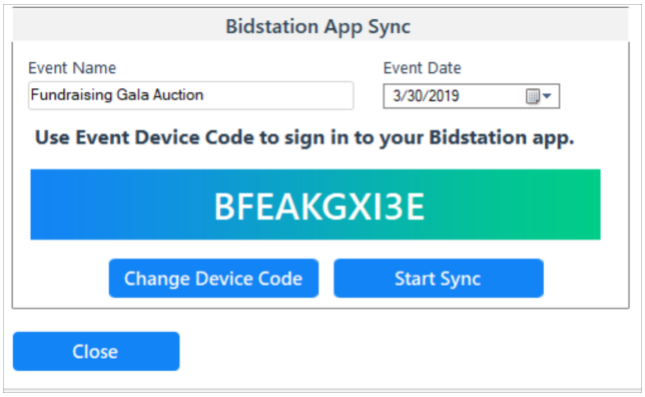


Figure 4 Setup Screen – Auction Detail

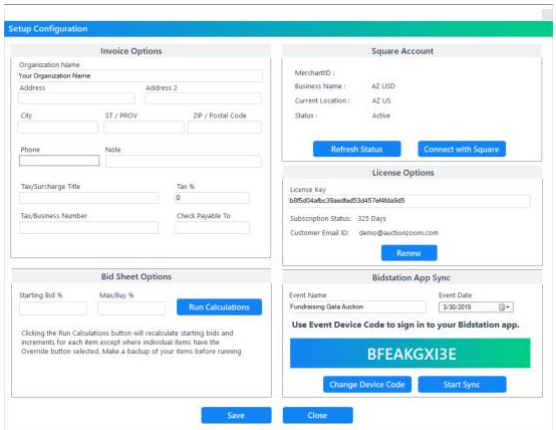


Figure 3 Setup Screen

Register Bidstation

Register Bidstation with the license key emailed to you under File/Register.

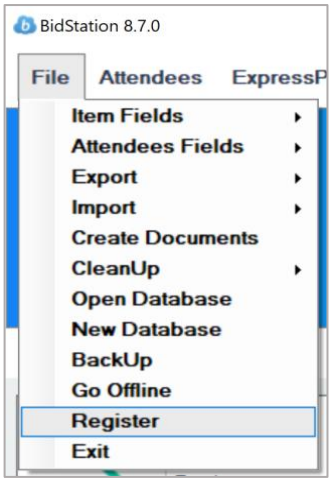


Figure 5 License Registration Selection

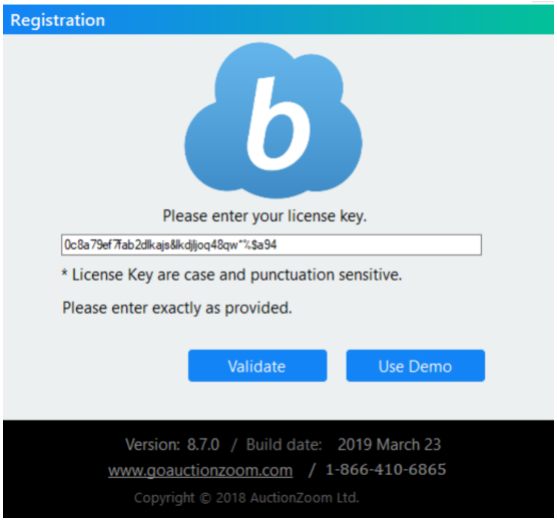


Figure 6 License Key Location

Set up payments

Set up to take credit cards by connecting Bidstation with Square. Sign in to the Square account you will use for the event by clicking **Connect with Square.** This will authorize Bidstation to use the Square account. You will have a chance to do this when you first run the program, but you can do it later from the Setup window.

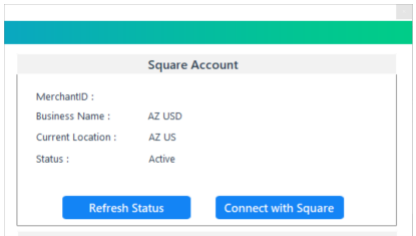


Figure 7 Square Account Panel

When you swipe cards at the event, the system captures and saves cards on file. Credit card numbers will not be visible again after you have registered a card for a bidder, but you can charge the card again. Once entered, the card is linked to bidder number and used for all purchases.

Set up Bidstation mobile app

Before you can use the Bidstation app on your mobile devices you will need to connect the devices with Bidstation by entering an **Event Device Code.** Select **Start Sync** in the Setup window, then **enter the Event Device Code** that appears in the Setup window in the required field of the app. Tap **Submit** in the app and your device will be enabled. You will now be ready to use the Bidstation app at your event. Use the same Event Device Code for any devices you are using at your event.

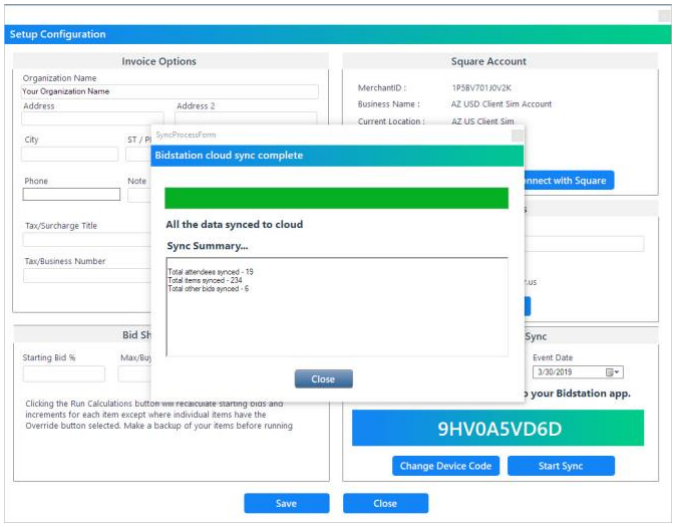


Figure 8 Event Device Sync

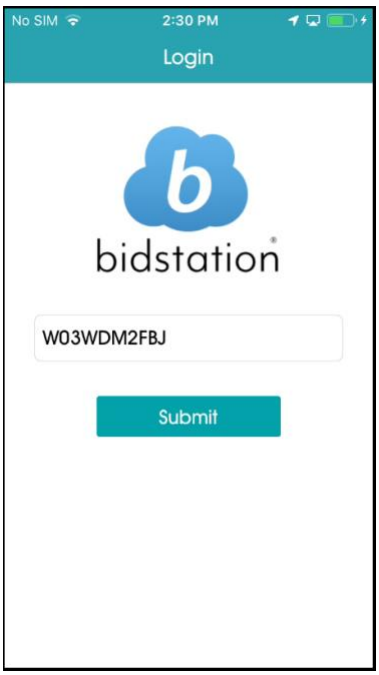


Figure 9 Enable Mobile App

Set up database

Bidstation comes with a sample database, but before you add your items and attendees you need to create a new database for your auction. From the File menu, select **New Database** from the drop-down menu, name the database and save it to a location of your choice. Your database is complete and ready for adding items and attendees, creating documents, and all other auction functions.

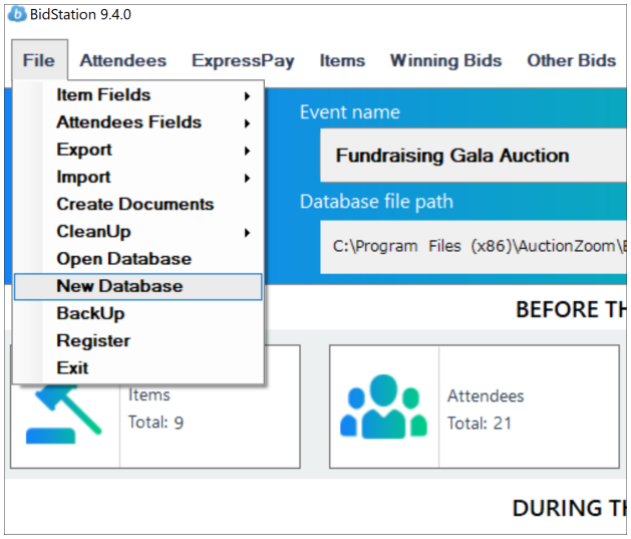


Figure 10 New Database Selection Menu

Enter items

Enter auction items according to the Type (**silent**, **live** or **basket**).

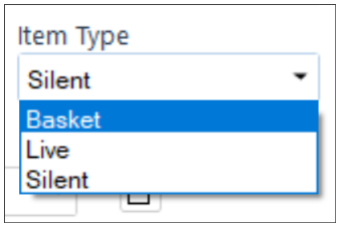


Figure 11 Item Type Drop-down Menu in Item Screen

Type defines the function of the item and how it is sold or won:

Silent auction items are won and key details are tracked on bid sheets, with the final amount determined by the winning bid.

Live auction items are won, but amounts and winning bidders are noted on paper in the moment.

Basket refers to an item you create from other items. It is entered as a silent auction item at first, but it is built from other items that have been entered so that donors and details for each item can be tracked.

Another kind of item that needs to be tracked is **Other Bids.** Other Bids are all donations, raffle tickets, wine pull entries, raise-a-paddle pledges and other non-auction purchases. Other Bids are labeled ahead of time for fast entry at the auction. (See description below.)

Enter item details

Define each item's **item number**, **title** and **description**. Add category and donor optionally, and value if you are having a starting bid. There are several fields for other options if you need them. The only details that need to be added before you run the auction are **item number**, **title** and **type**. Import all your items from Excel or add a new item by clicking **Add New.**

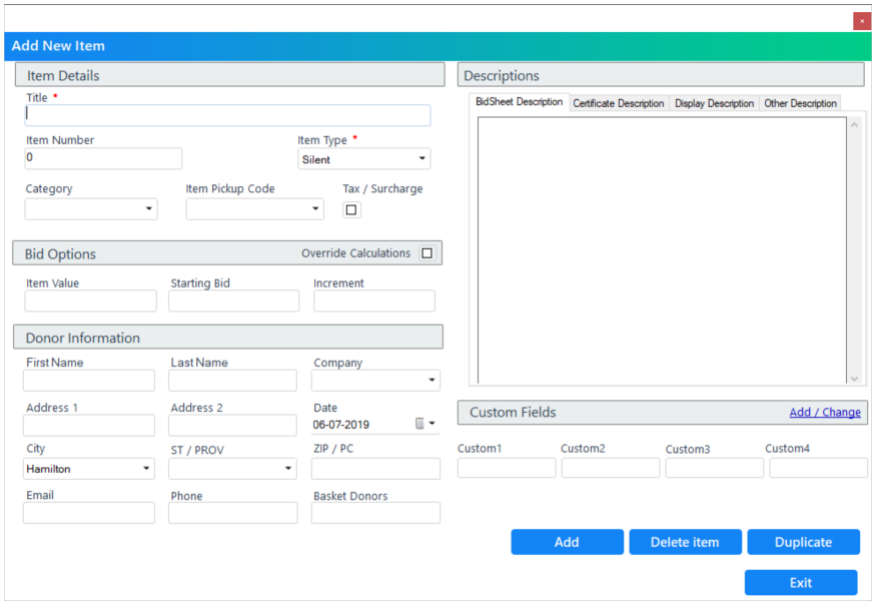


Figure 12 Add New Item in Items Screen

Title is used for bid sheets.

Item Number is a unique number for tracking assigned manually or by the system.

Description is an optional field used on bid sheets. Secondary description fields can also be used for other documents such as displays.

Prepare Other Bids Entry Screen

You may have raffle tickets, raise-a-paddle donations and other purchases at the auction (with or without set amounts) and there may be many of each item to enter. These non-auction items are treated separately, as 'Other Bids', and can be recorded on a rapid entry screen designed for this function.

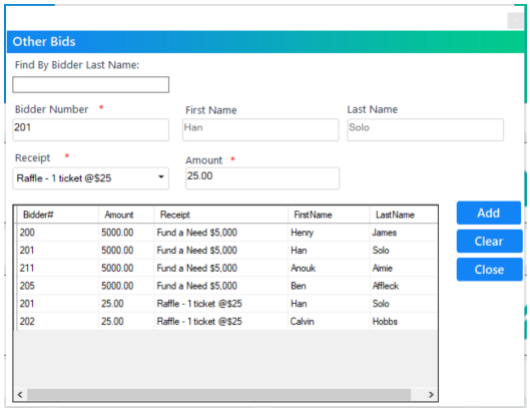


Figure 13 Other Bids Entry Screen

The Other Bids screen is prepared in advance, determining categories and amounts (if known) for Other Bids items so a bidder number alone can be entered in a text box at the event to record a purchase. Other Bids categories are created as Receipt Tags from the Other Bids screen reached from the main menu.

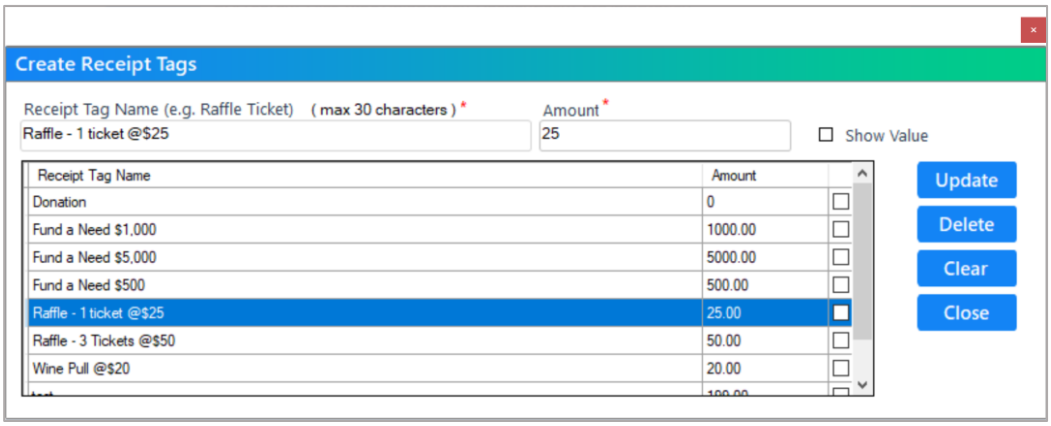


Figure 14 Create Receipt Tag Screen

You've completed the Quick Start.

1.3. What Is Bidstation?

Bidstation™ is auction management software for running an efficient auction event, synced with a mobile app and integrated with Square for simple registration and no checkout lines. The **Bidstation software** is used on your PC to plan and prepare for the auction. The **Bidstation app** is used to check in guests and collect payments at your event using your own mobile devices.

This user manual is organized to describe Bidstation software first, followed by a description of the Bidstation app (section 18 below).

Bidstation software stores information about auction ITEMS, the ATTENDEES attending the event, their BIDDER NUMBERS and payments made for WINNING BIDS, DONATIONS and PURCHASES.

A simple and efficient user interface allows easy data manipulation to produce itemized INVOICES, BID SHEETS, auction REPORTS and other DOCUMENTS useful for auction fundraisers. Basic operation of Bidstation will achieve great results for any auction planner. It is also flexible and capable of automating critical and timesaving steps along the way to meet unique auction needs. After orientation to the basics, it is easy to become fluent in Bidstation's operation to leverage the features and perform custom data operations that will facilitate just about any benefit auction event. With good planning and Bidstation, you can expect to have your best auction yet!

1.4. Overview of Using Bidstation

BEFORE THE AUCTION: Use the Bidstation software on your PC to plan your auction. Minimally you will need to enter auction item details, import or enter an attendee list and create bid sheets. Bidstation's ITEMS window welcomes data input to add auction items via form entry or by using

Excel/CSV file importing. Once entered, item details can be edited, item numbers can be automatically generated, and these details can be merged to create a variety of BID SHEETS and labels. Add ATTENDEES to print a guest list; generate BIDDER NUMBERS and merge donor information into thank-you letters; use data to create any other custom event documents.

AT THE AUCTION: At the auction you will use your own mobile devices to register guests and to collect payments. You will need one PC with Bidstation installed at the auction as well, for syncing payment information, entering winning bids, printing invoices, etc.

Use the Bidstation app on any number of mobile devices to check in guests and pre-swipe credit cards to avoid lineups at the end of the event. The app Saves a **Card on File** and the card is only charged if the guest makes a purchase. This way, your guests can skip lining up to pay at the end of the event and can simply pick up ITEMS directly.

You can generate and distribute invoices after the auction closes, but before the event ends, by quickly recording WINNING BIDS and printing INVOICES in Bidstation software on your PC. Checkout is completed with minimum effort and maximum efficiency, resulting in happy guests and staff.

AFTER THE AUCTION: Check and reconcile winning bids and when you are ready, process credit card payments in a batch for all cards that were Saved On File. The money is deposited into your organization's bank account. Payments are recorded in Bidstation for producing reports. Use the REPORTS function to see that all invoices have been paid.

1.5. What Is Saving Card On File?

Saving a Card on File is the process of using the Bidstation app to pre-swipe a guest's credit card when they register/check in so that they don't need to line up to pay before they leave. Similar to express checkout at a hotel, the credit card details are saved at check-in and charged at or after checkout only if any purchases are made. The software ties the credit card details to the bidder number so that any purchases or winning bids made with that number are added to the invoice and tracked in the system. This method addresses a major problem at silent auctions that don't use software, which is long lineups at the end of the night. It allows for secure and accurate, automatic payment processing with no lineup for guests who pre-swiped a card. And the streamlined checkout provides a pleasant final experience for guests.

Saving a Card on File requires a simple operation for check-in volunteers who will, for each guest, swipe a card using a Square reader, and save the encrypted, tokenized record for future processing. Each separate device with a Square reader has the same functionality, contains the same Attendee information and is synced with the Bidstation software installed on the PC at the event. The app operates using an internet connection without the need for a network.

2. Installing Bidstation and License Key Registration

This section assumes user familiarity with basic software procedures making installation of Bidstation very straightforward. Download the latest version of Bidstation from our website www.auctionzoom.com.

2.1. Installing Bidstation

Download and install Bidstation software on a Windows computer to be used at your auction event for administration. When you first run the program you will need to Register it (under File menu) with

the license key emailed to you, and you will be asked to sign in to your Square account to authorize Bidstation to use it. Make sure you sign in to the right Square account (the one you will use for your event) in Bidstation. If you don't authorize Square to use Bidstation at this stage, it can be done later from the Setup window. See Section 18, **Payments and Using the Bidstation App,** prior to the event.

Create database

When you install Bidstation to use it for the first time it has a sample database. You can use this sample database for practice but to run your auction you will first need to create a new database.

To create your new database, click File, select '**New Database**' from the drop-down menu, name the Database and put it somewhere on your computer. This is your database path. Now you are ready to enter Items and Attendees, and to create documents in preparation for your silent auction.

Usually the first thing people do when they create a new database is fill in the Setup screen (in the navigation menu). Fill in the Setup screen at this point (recommended) or at any point later **before you print invoices**. The Setup screen needs to be filled in before you print invoices if you want your organization's name, taxes or surcharges on the invoice.

Installation Steps

Download the software and license key that comes with it. Go to Register under the File menu and insert the code to license and register the software.

The file you will download will be called Bidstation.exe. Download it and save it to a location on your computer such as the desktop. Double click to launch the Bidstation installer and follow the prompts.

Click **Next** to Accept the default program installation folder location. If you have multiple user accounts on the computer that you're installing Bidstation on, select the option to install for '**Everyone**'.

User Access Control Warning: If prompted, click '**Yes**' to approve the software installation and allow it to proceed.

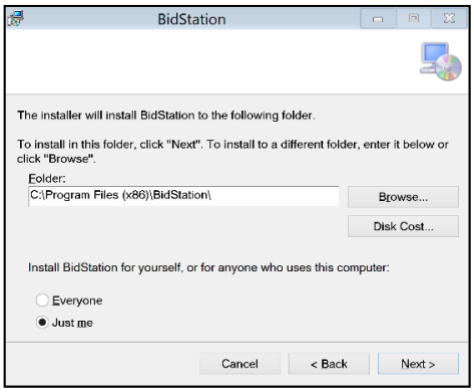


Figure 16 Installation Path

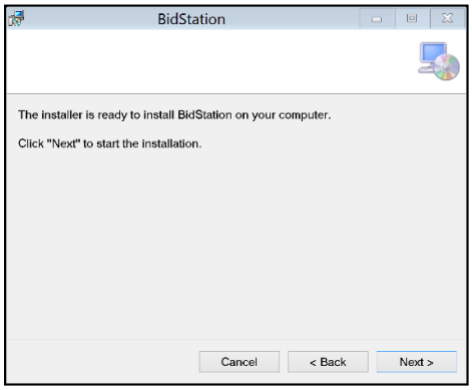


Figure 15 Install Bidstation

After clicking '**Next**' follow window prompts to complete the installation. The application will begin installing its components below:

SAP Crystal Reports (creates reports)

Microsoft Access Runtime Engine (database core)

Bidstation (auction management application).

Software Updates

Use the Help menu to check for updates. Bidstation will also automatically check for updates each time it opens and is able to find an internet connection.

2.2. License Key Registration

Registration is the first step to make Bidstation available to run an auction by assigning the software license to a specific organization. This is required on any computer where Bidstation software is installed.

After downloading and installing the software:

Use File/Register to enter the license key provided by AuctionZoom™.

Follow the prompts to activate the software.

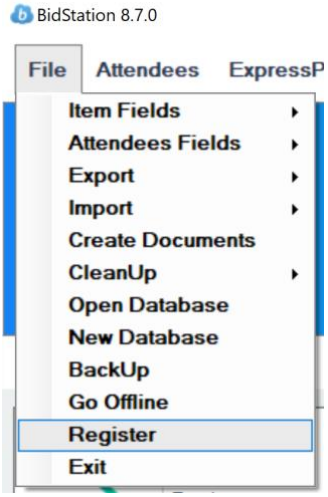


Figure 18 Register Bidstation

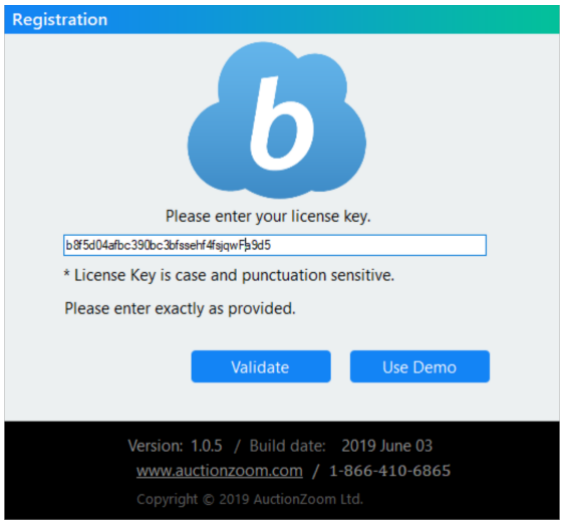


Figure 17 Enter License Key Field

Bidstation will open with a sample database (Filename: Sample.mdb) that includes ITEMS and ATTENDEES and other sample data that can be used for practice and training. Select a location on your computer and save this practice database (required step) to proceed. Continue with this database for trial purposes **or** start from scratch and create a new, empty database by clicking File, New Database and following the prompts.

Test Drive Data: This manual will outline many important aspects of creating and using event information. It is recommended that you use the first database information as a test environment to become familiar with the software. With this method, it is easy to try tasks, check results, and learn what is relevant and useful for managing your event.

Navigation hints in CAPS and bold: To assist with navigating, key terms or tasks appear periodically in CAPS or **bold** to draw attention to the process or intent of an action or operation (e.g. 'All data from the ITEMS, ATTENDEES, and WINNING BIDS can be exported…', '**Save Card on File**').

3. Setting Up the Bidstation App

The Bidstation app is used to manage check-in and payments at your event. In order to register and check in guests at the event you will need to run the Bidstation app on one or more of your own mobile devices. For this to work, you will first need to:

1) get the app and install it on the mobile devices you will use;
2) connect with Square in Bidstation to authorize Bidstation to work with your Square account. You will also need to enter some details about your Square account (email and password) in the software program on your PC when you connect with Square. It is recommended that you do this authorization when you are first setting up the Bidstation software and not at the event, since you may run into unexpected issues such as needing to confirm the Square account to be used, retrieving a password for your Square account, etc.
3) sync the devices you will use with the PC software.

3.1. Download and Install App

Download the app (Bidstation) from Apple's App store and install it on the devices you plan to use at your event. The app can be used on an unlimited number of iOS and android devices and each device uses the same Event Device Code. Ensure the operating system is updated on the devices you will use.

3.2. Enable Square to Work with Bidstation

Bidstation is integrated with your Square account. Select a Square account to use or get a new Square account if you don't have one. To enable Square to work with Bidstation you must sign in to your Square account from the Bidstation desktop software. First, check that you have installed Bidstation and registered it with a license key. Next, authorize your Square account. To authorize (or change) your Square account, open the **Setup** window from the menu bar and click on **Connect with Square** in the **Square Account** panel. A web browser will open. Enter the Square username and password for the account you will use for the event. Make sure you sign in to the right Square account (the one you will use for your event) in Bidstation. If your Square account details do not update automatically in the Square Account Panel (e.g. the message 'Not configured yet' appears), click Refresh Status.

3.3. Enable the Bidstation App

Bidstation runs on a Windows PC and a synced app. You will need to pair any mobile devices you plan to use with Bidstation by entering an **Event Device Code** that will connect them. To connect a device to Bidstation, first start a sync in the Bidstation PC software (click the button in the bottom right corner in the Setup screen), then enter the Event Device Code (found in the Setup screen) in the required field of the app.

Step-by-step:

On the Windows PC to be used at the event, go to the Setup window in Bidstation to generate a unique **Event Device Code**. This **Event Device Code** will allow the app to run after it is entered on a device.

Generate the **Event Device Code** by clicking **Start Sync**.

Next, download the app (available from the App Store) on your mobile device(s). The app will immediately prompt you to enter the **Event Device Code**. Enter the code and you are ready to use the Bidstation app at your event. Check in attendees, swipe credit cards and Save the Cards on File. For detailed instructions on using the app at your event, see section 18 below.

3.4. Controlling access

You can control whether devices have access by using the **Stop/Start Sync** located in the bottom right corner of the Setup window of Bidstation on your PC. Stopping the sync will unpair devices and remove data from them. Starting the sync will allow devices with the code to have access to the data and use the app. Stop the sync after the event to stop the pairing.

3.5. Recommended flow for setting up the Bidstation app

In Bidstation PC, click Setup.

If you didn't authorize your Square account already, click the **Connect with Square** button to connect your Square account with Bidstation. (If you have authorized your account, the details will be displayed in the Square Account panel. Click Refresh Status if you don't see them.)

In the bottom right-hand box, input an event **name** or reference, set the date and click **Start Sync**. You should see a popup displaying the cloud sync upload connection progress.

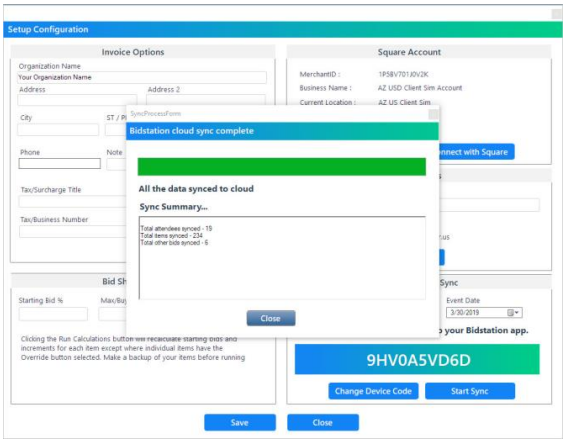


Figure 19 Start Sync

An **Event Device Code** will be generated for your sync. Input this code into the field on the Bidstation app home screen (on your mobile devices) to connect so that you can use it to check in bidders. You may right click the code to copy it for emailing to devices.

The sync may be started and stopped as needed. You may leave it running until the end of the event, but if you want to shut down devices from performing any further checking in, you may stop it and restart again at Checkout. The same Event Device Code will be used unless you select to change it. Once stopped, devices will no longer have access to any of the event data.

4. Bidstation Setup and Database Instructions

4.1. Setup Window

To provide information about the auction event, click on **SETUP** on the menu bar to see the Setup window.

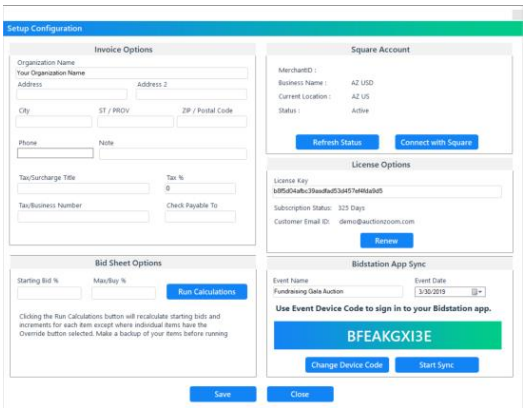


Figure 20 Setup Window

Setup information is optional, however certain functions will be limited without these parameters. For example:

INVOICES will not show organization's contact details.

ITEMS will not calculate the starting bid value.

Event's auction name will not appear in the dashboard.

4.2. Bidstation Setup Fields

Refer to the table below to complete the Setup window for Bidstation operation. All information provided will appear on the lower section of INVOICES as generated by the system.

SETUP FIELD	DESCRIPTION/PURPOSE
ORGANIZATION NAME	Insert the organization name to display it on invoices and other documents.
ADDRESS	Enter full address details in Address1/2, City State/Prov, and Zip/Postal Code.
PHONE	Enter contact number for the organization if you want it to appear on the invoice.
NOTE	Determine if a custom message is useful, for example: Email or website address for guest inquiries or promotional use. A 'Thank you for your support!' or Sponsor message.

TAX/SURCHARGE TITLE	Optional field that will add a % to an item's winning bid amount (if that selection has been made in the item's profile). Activate this function in ITEMS window for each item requiring surcharge and the text entered here will appear beside any invoiced ITEMS (winning bids, tickets, etc.); leave blank if not relevant. This field can also be used to add an amount to be applied for a buyer's premium (e.g. Auctioneer's fee) or State/Provincial sales tax.
TAX %	Enter percentage of tax/surcharge required; as above, this is not automatic and must be toggled on for every Item that requires a surcharge (see section 7.6 Items Import Conventions).
TAX/BUSINESS NUMBER	Provide a charitable or business number for reference.
CHECK PAYABLE TO	If accepting checks, provides 'payable' direction to bidders.
STARTING BID %	To use Bidstation's automatic calculation of the minimum bid, enter a percentage of an Item's value as a starting bid, either individually per item, or as a set percent (e.g. 25%) for all items. Bidstation will make the calculation and round up to the nearest dollar value. You may also set a minimum bid in the Excel import file that you'll be using. **Note** that if you do import minimum bid values, they will be overwritten with an updated calculation if you've entered a value in this field.
MAX BID/BUY IT NOW %	Setting a maximum bid or buy-it-now value will enable auto-calculation of increments on bid sheets. The percentage entered here will determine the final increment (or buy-it-now) amount as a percentage of the item's value (i.e. 110% of an item's value will be 10% more than the item's value).
EVENT NAME	Enter event name; add the date or year to differentiate events.
EVENT DATE	Select actual date of event using calendar.

4.3. Bidstation Setup: Database File Format

At Bidstation's™ core is a single Microsoft Access database file that stores auction information similar to a Word document or an Excel spreadsheet. Bidstation™ only needs the simple file format (.mdb file extension) to open and work with data for each event.

This single Access database file makes it easy to do the following:

- Open individual database files for individual events, if working on multiple events.
- Back up and transport your database from one computer to another.
- Create backup database copies anytime, and often; the backup file is a small duplicate copy of the database that is easily stored.

Sample Database: Bidstation™ installs with a sample database (Sample.mdb) and required Setup information ready for use with no additional required configuration. This sample data facilitates user orientation to the typical views of the software.

4.4. FILE/New Database

To start with a blank database, use the File menu (select 'New Database') to name a new file and save it to a preferred location.

4.5. FILE/Open Database

To move between different database files (for separate events, using test data, etc.) change the database file Bidstation currently has open as needed with this menu command ('File/Open Database'). The path is always visible on the main page to ensure it is easy to monitor that the desired database is being used. Data is continually saved, so there is no need to click save before moving to a new database.

4.6. Using Bidstation on a Network and Repairing a Damaged Database File

4.6.1. Using Bidstation on a Computer Network

Bidstation can be used on a network to allow multiple users to simultaneously access the software's database in that multiple computers can read and write data at the same time while connected to the network. However, this use would not be recommended for most auctions as the rapid entry features and other Bidstation functions make it unnecessary, even for very large events. Networks are also prone to disconnection at events and require specialized knowledge and equipment.

4.6.2. Repairing a Damaged MS Access Database File

CAUTION: When using Bidstation with a network, a network communication disruption can occur that renders your database file temporarily unreadable by Bidstation. A database repair tool is included in Bidstation to enable file recovery for continued operation in anticipation of this type of unplanned interruption.

Repair Process: If you do use Bidstation on a network and there is a communication disruption that causes the application to lock up, an error message will appear that says 'the file is an unrecognizable format'. Follow this procedure:

Note any in-process transaction(s) at the time to verify the data was saved after database repair.

Close each Bidstation computer that is connected to the 'master' Bidstation computer (where the Access database file is located).

Under the Help menu, click Repair Database.

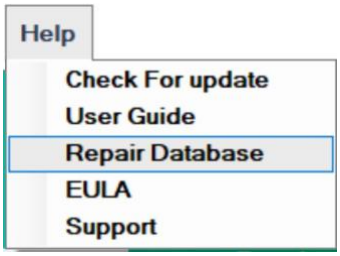


Figure 21 Help Menu

Wait for the message confirming that the database has been repaired.

Re-start each Bidstation computer.

Check if any transactions need to be re-entered from earlier posting when the error occurred.

In most cases, Bidstation's repair utility will engage and repair the database automatically and in the background. If not, perform the above procedure to fix it and continue clerking the auction.

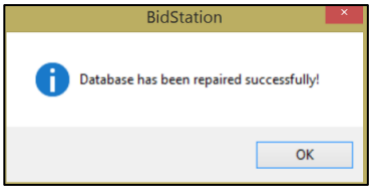


Figure 22 Database Repaired Notification

5. Menu Commands and View Windows

5.1. Navigation Menu

Use the top menu bar, pictured below, to access Bidstation's drop-down commands and data entry windows. The most commonly accessed functions in this menu are also conveniently available via icons on the dashboard and are organized based on when they might typically be used: **before**, **during** and **after** the auction.

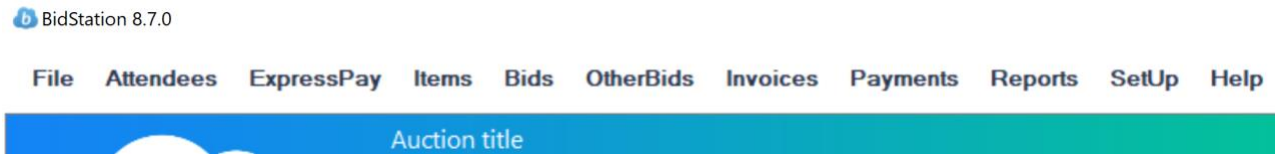


Figure 23 Navigation Menu

Dashboard Buttons: Many frequently accessed functions are also accessible via the dashboard buttons. These buttons deliver the same options and are intended to facilitate navigation to the software features.

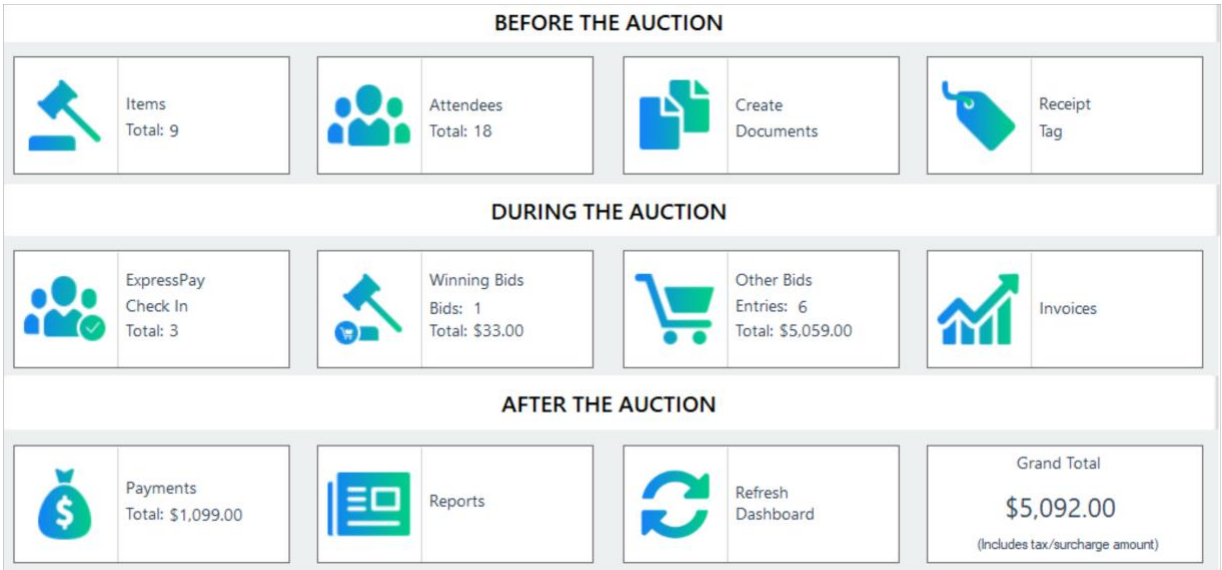


Figure 24 Dashboard

5.2. Menu Commands

The table below provides detail on the functions available from the Navigation Menu. See section 6, Administrative **Functions**, for further explanation of several of the File menu functions.

MENU ITEM	DESCRIPTION/FUNCTION
FILE	Edit Item and Attendee fields; Export and Import data; Create Documents such as bid sheets, labels and certificates; CleanUp (erase) data; Open existing or new database; Backup database; Register license key.
ATTENDEES	For entering/uploading names, contact details, bidder number and other details of event ATTENDEES.
EXPRESSPAY	For quick reference, this command runs a report displaying all ATTENDEES with a **Card Saved on File**.
ITEMS	Enter or Upload Live and/or Silent auction ITEMS including their title, value, starting bid, donor information, custom fields, etc.
WINNING BIDS	Enter WINNING BIDS for auction ITEMS at the event, prior to invoicing.
OTHER BIDS	Enter OTHER BIDS (amounts purchased/pledged) for non-auction ITEMS. Create and Manage Receipt Tags for donations, raffle tickets and other non-auction ITEMS.
INVOICES	Create/view/print/report and/or email INVOICES for bidders at or after the event. Can be organized by Bidder Number, Table number, Only ExpressPay, Only Non-ExpressPay, Only Live Auction, Single Invoice by Bidder number or Payment Type, with additional options for segmenting. Email invoices may contain up to 30 line items per invoice.

PAYMENTS	Enter and manage cash and check payments. Process payments for **Cards Saved on File**. It is also possible to enter credit card payments manually in the software as an alternative to/in addition to using the mobile app.
REPORTS	Create and print reports to see information on ATTENDEES, ITEMS, BASKETS, WINNING BIDS, OTHER BIDS and PAYMENTS. Especially useful for reporting on event outcomes and for future planning.
SETUP	Contains separate panels where you can: Enter organization details; Enter invoice options; Apply bid sheet increment calculations; Manage Square account connection; View and Renew Bidstation license key and Subscription Status; Enter event name and date, Generate Event Device Code to enable mobile app, Start and Stop device Sync.
HELP	Check for Software Updates, User Manual, Tool to Repair Database, End User License Agreement (EULA), Support

5.3. Data Entry Windows

Used to add, edit or delete a record in the database (e.g. ATTENDEES window below); alternatively, data may be imported via Excel Spreadsheets or CSV file formats (See section 6.2).

Using the **Tab key** to move between fields, there are two methods for inputting data:

Data entry box: Use the keyboard to type any value into this box (e.g. *Last Name).*

File drop-down box: Select from a drop-down box of specific options for a field (e.g. *Sponsor Level*). Click the down arrow to display a list of selections. Drop down menu items are created when they are added to an item or attendee. Alternatively, they may be added, edited and removed via the file menu ITEM fields and ATTENDEES fields.

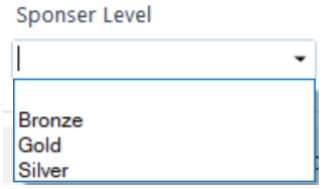


Figure 25 Sponsor Level Field Option

User-Defined Custom Fields: In both the ATTENDEES and ITEMS windows there are four data fields that may be customized by the user to track certain event information, if desired.

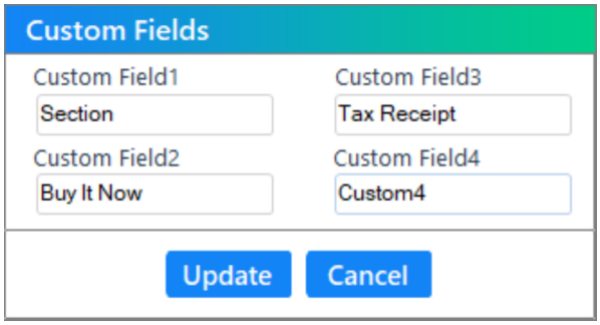


Figure 26 Custom Fields – Editing View

For example, custom fields could include a Constituent ID from the donor database, could be used to track menu preferences, or could include a value to merge into documents such as Table Host.

Custom Field Labels: Click on Add/Change in this Custom Fields panel to label the fields as needed.

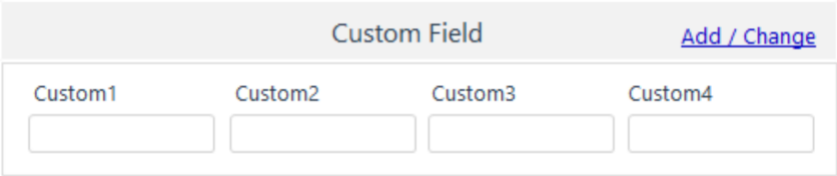


Figure 27 Custom Fields – Data Entry View

Note: Bidstation export/import templates retain generic column header data labels (e.g. Item1 or Attendee1). The user can update Excel Column headings with custom labels *after* the data is imported or exported, if needed.

Importing Data from an Excel Spreadsheet is a common and preferred method of inputting ITEMS or ATTENDEES data into Bidstation in advance to increase accuracy and save data entry time for users.

See section 7 for instructions to perform successful data imports/exports when working with event data. Import templates are provided with Bidstation under the File/Import menu.

Importing can be a process that is repeated several times, if the desired results are not achieved on the first attempt.

6. Administrative Functions (FILE Menu)

The File Menu provides the key administrative functions for managing the Bidstation software program. The explanation regarding each menu option appears below:

6.1. FILE/Export Data

All data can be **exported** out of Bidstation in Excel and CSV file formats to be used in other computer programs such as donor databases or Microsoft Word. Exporting is useful for tasks such as document creation, event analysis, and managing historical records for ongoing events. Use the File Menu to Export data by selecting **Export**, selecting the type of data you want to export, and clicking **Save**.

6.2. FILE/Import Data

Data may be imported into Bidstation from an Excel spreadsheet or CSV file as ITEMS and ATTENDEES and BIDS. Importing ITEMS and ATTENDEES data can save significant time and improve data accuracy by populating the event database with information verified in Excel column form.

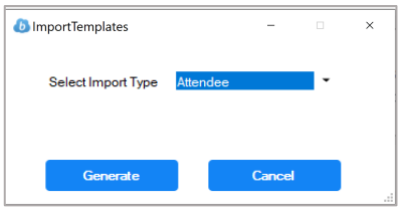


Figure 28 Import Selections

Import Format Conventions: The import file conventions must be closely followed in order to complete the import process successfully. To ensure the spreadsheet contains specific header data, the best method is to use the **Bidstation templates for importing data.**

First, create the file using a template:

Select File/Import/Import Templates.

Select import type (Attendees, Items, Winning Bids, Other Bids, Payments).

Choose the preferred import Excel format (.xls or.xlsx extension).

Select **Generate**; follow prompts to save Excel file to a preferred location.

The Excel template file (e.g. Item.xlsx) will then both save and open automatically, displaying data headers in the first row in the spreadsheets as shown below. Each column creates space for data for each ITEM, ATTENDEE, WINNING BID or OTHER BID to be prepared for import. Columns may be reordered or deleted except the required headers. User-defined fields can be renamed **after** the import is complete. **Note**: Excel import will not work if your Excel sheet has any formulas. If you are experiencing errors importing Excel, try CSV file format instead.

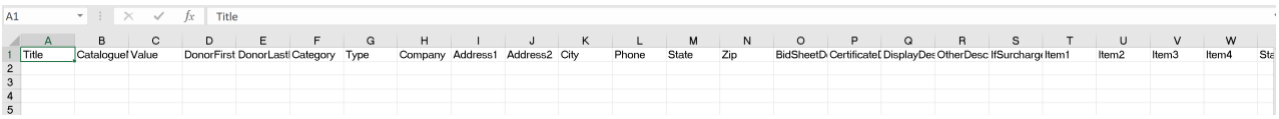


Figure 29 Headers in Excel Template - Items

To import data prepared in templates into Bidstation, select File/Import/, then select the category of data to be imported (Attendees, Items, etc.), browse to find the file you created using the template (e.g. Items), select and Open. Your data file will be added in Bidstation. See section 7.1, **Importing Data Into Bidstation** for full details and instructions that should be followed.

6.3. FILE/Create Documents

This option enables the user to create a variety of auction documents based on event information in the database. Whether based on system templates or custom documents, see section 14.4 for example documents for consideration.

6.4. FILE/Cleanup

The Clean Up function **permanently deletes information** from the database. This maintenance task can be done at any time but is **NOT reversible**:

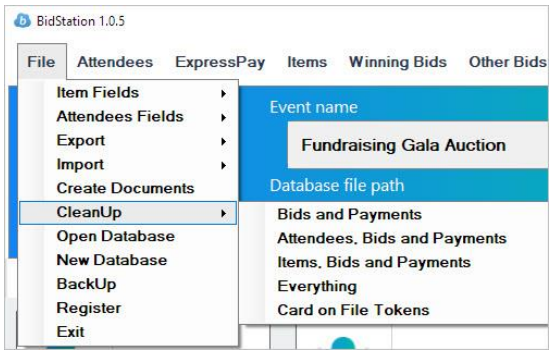


Figure 30 Clean Up – Permanently Deletes Data

Choose from the menu to selectively remove a segment of data. You may wish to create a Backup database prior to Clean Up that can be deleted at the end, in case of accidental deletion.

After the auction is completed and when you have processed all payments, the Clean Up function (under the File Menu) should be used to remove all data from the program, or just to delete the card payment tokens. Other data may be kept for future planning. To delete all data, select 'Everything'. To delete only the credit card payment tokens, select 'Card on File Tokens'.

To start a new database for a new event, or for your next year's event:

Choose File/New Database to start a new file; define the name and path location.

Or, you can use the same database by deleting all data using the Clean Up function. (First consider whether there is a need to refer back to a database in future.)

Note: FILE/Open Database and FILE/New Database functions are outlined in sections 4.4 and 4.5 of **Bidstation Setup and Database Instructions**.

6.5. FILE/Backup

Bidstation contains important event information resulting from considerable investment of data entry time and user effort. Regular backups are a quick and easy process to safeguard against any potential corruption of data and can also be used as a simple method for copying the database to transfer it to another computer. To make a backup, create a duplicate copy and save (but don't overwrite) it. The saved copy will be your backup and you can continue to work on the original.

DAILY BACKUPS: Regular backups are recommended both daily and immediately after entering a large amount of data. Backing up requires just moments to complete:

Select **File/Backup.**

Choose a location to save the original file to, give it a unique name, and click **Save**.

Rename backup files to indicate timing (e.g. after importing ITEMS/entering WINNING BIDS).

Generate as many backup files as required to keep current data safe (file size is very small).

Restoring a Backup File:

To open a previously saved backup file to restore information to your database:

Select **File/Open Database.**

Browse to find the most current/relevant backup file to re-open and resume data entry.

Rename the file to be the current working file.

Store the file in a suitable location.

Make a new backup file at the end of the data session.

Or, copy the current backup from its location and paste it to the working file location to keep the backup file in its original state. After the data session, repeat the File/Backup process to update again.

7. Importing, Entering and Exporting Data

This section outlines how to prepare an accurate and effective event database by providing detailed instructions on:

1. Importing data into Bidstation (section 7.1)
2. Bidstation database field **requirements** and **optional fields** for information related to ITEMS (section 7.2).
3. Bidstation database field **requirements** and **optional fields** for information related to ATTENDEES (section 7.3)
4. Generating Import Templates to upload data, if desired (section 7.4).
5. Conventions to be followed for importing Attendees data (section 7.5)
6. Conventions to be followed for importing Items data (section 7.6)
7. Exporting data (7.7)

Database information can be entered by keying in information, by editing information, or by importing from an Excel or CSV file (Section 7.1). The conventions to be followed for preparing data to be imported (sections 7.5 and 7.6) should be carefully followed.

The databases have pre-populated field headers. These headers must not be altered for the import and export functions to work properly.

7.1. Importing Data into Bidstation

Data can be keyed in or imported into Bidstation from Excel or CSV files. Templates are provided for each data type. Once files for import have been created, you can Import data from the File Menu. Use the drop-down menu to select **File**, then **Import**, then the **Type** of data to be imported (e.g. Items). Browse to the file that was created and select **Open**. Your data file will be added in Bidstation

and the file will open. Once data is imported into Bidstation, you can make changes but should first become familiar with the conventions and requirements for each type of data, since certain changes are not permitted in the program and could prevent the program from functioning. If you change your Excel files, they should not be imported a second time without deleting first to avoid creating duplicate records.

New items can be imported using the method described above but must be imported from a new Excel/CSV file each time since **importing always adds/appends**, and **never overwrites**, data. To update data, edit it in Bidstation or delete the record in Bidstation before importing it a second time.

7.2. Database Fields: ITEMS

See the table below for descriptions of the labels used to record item information. Only the **Title, CatalogueNumber** (referring to the **Item** number) and **Type** are required. However, the other information is useful for organizing into baskets or categories, for thanking donors, for producing informative bid sheets, etc.

FIELD	ITEMS – DATABASE FIELD DESCRIPTIONS (REQUIRED AND OPTIONAL)
TITLE	**Required;** A descriptive title for the item (e.g. Dinner for two at Damu's Cuisine). Will appear on invoice and other documents.
CATALOGUENUMBER (equivalent to ITEM NUMBER)	**Required**; Unique number that tracks each ITEM and BASKET in the silent auction. **Use numbers only.** Will appear on invoice and other documents. (**Note**: Catalogue is a term used for items, but must be left as 'Catalogue' in the Excel or CSV file when importing.)
VALUE	Value is used for auto-calculating bid sheet increments. You can enter the donated or market value of the ITEM. If no value is added for an item, the word 'Priceless' will appear on bid sheets that include a value field. Only the winning bid amount is invoiced to the bidder.
CATEGORY	If auction is subdivided into segments, use **Category** to track ITEMS/BIDS by category; once a value is entered, it will appear in drop down list. ITEMS may be segmented by Category when using system to generate item numbers, creating number ranges for each category. May also be useful for printing an auction catalogue.
TYPE	**Required;** Choose **Basket**, **Live** or **Silent**; If required, item numbers and summary auction reports can be automatically generated by Type. Basket type is auto-assigned by the software when baskets are assembled.
COMPANY	Enter donor contact information related to the ITEM to facilitate records, communication and correspondence. If 'Company' is entered once, company information will be available in drop-down menu for additional donors from the same company.
DONOR FIRST NAME	Enter donor contact information related to the ITEM to facilitate records, communication and correspondence.
DONOR LAST NAME	Enter donor contact information related to the ITEM to facilitate records, communication and correspondence.

BID SHEET DESCRIPTION	Enables short narrative or other text description for bid sheets. Up to 5000 characters. Can be used to merge data into any Word document.
CERTIFICATE DESCRIPTION	Enables text for certificates. Up to 5000 characters. Can be used to merge data into any Word document.
DISPLAY DESCRIPTION	Enables narrative and text for displays. Up to 5000 characters. Can be used to merge data into any Word document.
OTHER DESCRIPTION	Enables text description for any other type of document you may need.
IFSURCHARGE	Shows percentage of tax/surcharge if required. Must be toggled on for every Item that requires a surcharge (see section 7.6).
STARTING BID	Automatically calculates if a percentage of ITEM value is entered during Setup. This percent amount can be edited any time and for individual items.
INCREMENT	Refers to each step on the bid sheet if pre-printed bid increments are used. If no Increment value is entered, nothing is calculated.
ADDRESS1	Donor address field.
ADDRESS2	Donor address field.
STATE	Donor address field.
ZIP	Donor address field.
CITY	Donor address field.
PHONE	Donor contact field.
ITEM1	One of four custom (user-defined) ITEM fields to be used for details such as Segment close time, Tax receipt requested, Item restrictions, etc. Select 'Add/Change' to label custom Item fields as needed. Fields are included in exports for use in all documents.
ITEM2	One of four custom (user-defined) ITEM fields to be used for details such as Segment close time, Tax receipt requested, Item restrictions, etc. Select 'Add/Change' to label custom Item fields as needed. Fields are included in exports for use in all documents.
ITEM3	One of four custom (user-defined) ITEM fields to be used for details such as Segment close time, Tax receipt requested, Item restrictions, etc. Select 'Add/Change' to label custom Item fields as needed. Fields are included in exports for use in all documents.
ITEM4	One of four custom (user-defined) ITEM fields to be used for details such as Segment close time, Tax receipt requested, Item restrictions, etc. Select 'Add/Change' to label custom Item fields as needed. Fields are included in exports for use in all documents.
LABEL CHOICE	Signifies physical type of item for Bidder pickup process: B=Basket; P=Physical; C=Certificate. Customize in drop-down menu to prepare invoices for auction winners.

DATE	Date can be any preferred date. It appears as the date the record was created unless a date is entered.
EMAIL	Donor email can be stored here.

7.3. Database Fields: ATTENDEES

See the table below for descriptions of the labels used to track Attendee information. Only the **First Name, Last Name** and **Paddle Number (Bidder Number)** are required to run the auction. Other fields can be used as needed. For importing, the **First Name** and **Last Name** are all that are required to successfully import the Attendees file. **Paddle/Bidder Numbers** can be added after Attendees have been imported to allow for the use of the Generate Bidder Numbers tool (section 10.4) in Bidstation. However, the preparation of bid sheets and operation of the silent auction depends on having Paddle/Bidder numbers so these numbers should be assigned soon after importing Attendees data.

FIELD	ATTENDEES – DATABASE FIELD DESCRIPTIONS (REQUIRED AND OPTIONAL) All fields not marked 'Required' are optional.
FIRSTNAME	**Required.** Enter Attendee's first name. (Important to match ATTENDEES with BIDDER NUMBERS and BIDS for invoices.)
LASTNAME	**Required.** Enter Attendee's last name. (Important to match ATTENDEES with BIDDER NUMBERS and BIDS for invoices.)
MIDDLENAME	
TITLE	E.g. Dr., Mrs., Ms., etc. May be useful for correspondence, labels, nametags, etc.
PARTNERFIRSTNAME	Record if Attendee's companion is registered under the same bidder number. Also useful for correspondence, signage, etc.
PARTNERLASTNAME	Record if Attendee's companion is registered under the same bidder number. Also useful for correspondence, signage, etc.
PARTNERMIDDLENAME	
PARTNERTITLE	E.g. Dr., Mrs., Ms., etc.
PADDLENUMBER (BIDDER NUMBER)	**Required for bid sheet preparation and for silent auction**. Can be imported or generated using the Generate Bidder Numbers button in Bidstation (in the Attendees Window). If importing, use numbers only. PaddleNumber matches Bidders with WINNING BIDS and OTHER BIDS for invoices. (**Note**: Paddle Number is a term used for Bidder Number, but must be left as 'PaddleNumber' in the Excel or CSV file when importing.)
TABLE#	Use combinations of numbers/characters as needed: **If using characters**, test table titles to ensure the list sorts as intended: • In reports, to ensure that sorting provides meaningful information

	• For printing invoices by table number/title if the auction plan includes distributing/printing invoices by table number.
CLASSIFICATION	Click to create classification labels for Attendees (e.g. staff, VIP, etc.) by typing into the field. The classification created will then be available in the drop-down menu. Reports can also be generated according to classification.
SPONSOR	Track different types of ATTENDEES according to level or type of sponsorship. Create your own descriptors and enter in this field. These levels/types should be set prior to the entries and must be consistent for good report results.
IFEXPRESS	Denotes if the bidder payment card was swiped using the Bidstation app at Check-in /Registration.
ADDRESS1	Enter all address information related to the ATTENDEE as required by the event to facilitate records, communication, and correspondence. For attendees using a common company name and address, use the company drop down field to auto-complete the address details.
ADDRESS2	For Attendee
CITY	For Attendee
PHONE	For Attendee
STATE	For Attendee
ZIP	For Attendee
ATTENDEE1 *NOTE: DO NOT CHANGE HEADER NAMES IN IMPORT FILE*	One of four custom (user-defined) ATTENDEE fields available for data not otherwise provided in Bidstation (e.g. Dinner choice, Coat Check#, Alumni, Volunteer, etc.) Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed. Fields are included in exports for use in all documents. Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.
ATTENDEE2 *NOTE: DO NOT CHANGE HEADER NAMES IN IMPORT FILE*	One of four custom (user-defined) ATTENDEE fields available for data not otherwise provided in Bidstation (e.g. Dinner choice, Coat Check#, Alumni, Volunteer, etc.) Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed. Fields are included in exports for use in all documents. Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.
ATTENDEE3 *NOTE: DO NOT CHANGE HEADER NAMES IN IMPORT FILE*	One of four custom (user-defined) ATTENDEE fields available for data not otherwise provided in Bidstation (e.g. Dinner choice, Coat Check#, Alumni, Volunteer, etc.) Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed. Fields are included in exports for use in all documents. Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.
ATTENDEE4 *NOTE: DO NOT CHANGE HEADER*	One of four custom (user-defined) ATTENDEE fields available for data not otherwise provided in Bidstation (e.g. Dinner choice, Coat Check#, Alumni, Volunteer, etc.) Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed.

NAMES IN IMPORT FILE	Fields are included in exports for use in all documents. Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.
EMAIL	For ATTENDEE
COMPANY	For attendees using a common company name and address, use the company drop down field to auto-complete the address details. Once the company field is filled in it will appear in the drop-down menu.

7.4. Bidstation Data Import Templates

Data import templates can be used to help prepare information to be imported into Bidstation. While use of these templates is not strictly required, it will be helpful in formatting all data properly and according to the conventions required to use the Import/Export function (see sections 7.5 and 7.6).

The process of importing data into Bidstation from Excel requires certain data headers to work seamlessly. It is therefore recommended that you use Import Templates to format data in Excel according to the template headers. (See: File/Import/Import Templates).

To create an import template in Bidstation, navigate to the File menu, then Import, then Import Templates. From there select the template you would like to create.

To import data from Excel, navigate to File/Import. Select Import, browse to find the file (e.g. Attendees) and select it to import it.

For all import templates, the following parameters apply:

- Column headers may be reordered according to user preference in the import template.
- Except for a required field, any column headers may be deleted. (If custom fields are not needed, removal may improve template work area.)
- Adding information in the import template in all non-required columns is optional.
- Excel sheet may not contain any formulas.
- Ensure all conventions are observed for import files, referring to the tables below (sections 7.5 and 7.6) for specific requirements for ITEMS and ATTENDEES.

7.5. ATTENDEES Import Conventions

The Attendees Import Conventions describe the precise format for data entry in Excel and CSV files that will be used to import data into Bidstation. Import Conventions must be followed for data to be imported.

HEADER	ATTENDEES – Import Template Header Conventions
FIRSTNAME	**Required.** Imports will not work without First/Last Name data of ATTENDEES entered.
LASTNAME	**Required.** Imports will not work without First/Last Name data of ATTENDEES entered.
PADDLENUMBER	**Required to run the auction and to save an Attendee's credit card on file.**

(BIDDER NUMBER)	Created by either: Entering numbers only or Using the **Generate Bidder Numbers** tool in Bidstation after importing ATTENDEES. (The 'Generate Bidder Numbers' button can be found in the **Attendees** window.) **Note**: Use of characters other than numbers not allowed.
TABLENUMBER	If you are designating tables, enter up to 30 characters with letters and/or numbers. Check to ensure table numbering data sorts as intended (e.g. Table 01 or Table 1).
IFEXPRESS	Leave blank. The IfExpress field is filled automatically by the program. Attendees will first be recorded as Non-ExpressPay (**no Card Saved on File**). This will be updated in Bidstation once a Card is Saved on File. The code indicating a card is on file is -1. The code indicating that a card is **not** already on file is blank or 0.
EMAIL ADDRESS	If imported into Bidstation, email addresses will be synchronized with Square to enable a faster Save Card on File process, and to enable e-receipts to be sent after credit card payments are processed (if selected). Email addresses are also used by Bidstation if the email invoices function is used. (This selection is made in the Invoices menu.)

There are also import conventions for importing Items.

7.6. ITEMS Import Conventions

The Items Import Conventions describe the precise format for data entry in Excel and CSV files that will be used to import data into Bidstation. Import Conventions must be followed for data to be imported.

HEADER	ITEMS – Import Template Header Conventions
TITLE	**Required:** ITEMS data will not be imported without Title values.
CATALOGUE NUMBER (refers to ITEM NUMBER)	Although it refers to the Item number, leave as labelled ('CatalogueNumber'). Use numbers only (not alpha text). May be left blank for importing but item numbers are required to run the auction. CATALOGUE NUMBERS (referring to the Item numbers that organizers assign to items in the auction) are either: Assigned by the user in the import process. or Generated by Bidstation after items have been imported (see section 9.3).
VALUE	Dollar value of item. Use numbers only. Do not use currency symbols such as '$'.
DESCRIPTION FIELDS	There are four description fields available for use. Follow all conventions when entering data in them.

	• Bid Sheet Description – original description edited for auction purposes. • Certificates – text to appear on actual certificate for winning bidder. • Display Description – if required for document creation use (e.g. signage). • Other Description – any other text required. May contain any combination of symbols/letters/numbers up to 5,000 characters including spaces. Do not add any formulas or paragraph formatting such as line breaks in Excel. May be edited in the ITEMS data entry window post-import if required. (Use the Export process to update Excel data later, as required.)
IFSURCHARGE	The IfSurcharge field is the Tax/Surcharge field box in an item's profile. It needs to be checked if you are applying a tax or surcharge to that item's winning bid. Use Excel column if a tax/surcharge is relevant for each ITEM. If you are not applying a tax/surcharge, leave blank or enter the numeral 0 (zero). To import ITEMS and apply the tax/surcharge, enter the numeral 1 (one) in the excel column. When entering ITEMS data manually, check and or uncheck the 'Tax/Surcharge' box in each Item profile as relevant. (The default is unchecked.) Surcharge status can be edited in the ITEMS window at any time (check/uncheck).
STARTINGBID	A Starting Bid (i.e. minimum bid) is used in bid sheet templates when a minimum amount is desired or when increments are specified for bidders to follow. Set a starting bid for an ITEM in one of two ways: Select a starting percentage to apply to all items: In Setup, in the Bid Sheet Options panel, enter a percentage of the item value as a minimum (Starting Bid). Bidstation will calculate and insert the starting amount, rounded to the nearest dollar. (You can optionally enter a maximum/buy it now percentage in this panel as well.) or Enter a starting bid for each item individually. Starting bids can be entered in Excel (in the StartingBid column) or they can be entered manually in each item's profile.

7.7. Exporting data

Exporting data may be used for a variety of purposes such adding data from Bidstation to a donor database or displaying data of bidding results in a presentation. Exporting bids can also be useful for preparing winning bidder displays. You can export all ITEMS, ATTENDEES, WINNING BIDS, OTHER BIDS and PAYMENTS data out of Bidstation in Excel and CSV file formats for use in other computer programs such as donor databases or Microsoft Word. Use the File Menu to Export data by selecting **Export**, choose the data type from the list and **Save** the data file. Export of Reports is also possible in Bidstation but this is done from the individual reports (section 15.2).

8. Entering data for ITEMS, ATTENDEES and WINNING BIDS

There are three kinds of data entry needed to run a silent auction. Auction Items need to be entered, with their accompanying item numbers and descriptions. Attendees need to be entered, with their accompanying bidder numbers. And winning bids and purchases need to be entered. The first two categories of data (Items and Attendee list) are entered in advance, before the event. Winning bids and purchases are entered during the event, on time for preparation of final invoices and checkout. Bidstation is designed for smooth and flexible data entry of attendee and item details before the auction, and for fast entry of winning bids and purchases according to bidder number at the auction event.

Data entry for Items and Attendees will be faster and easier if you use Bidstation's Import functions and pre-designed templates. Before you begin entering data it is recommended that you consult section 6 (Administrative Functions) and Section 7 (Entering, Importing and Exporting Data). Section 7 also details the required conventions to be followed for data entry in Bidstation to ensure the program operates smoothly.

9. Entering ITEMS Data

To run your silent auction, you will need to enter all auction items into Bidstation, including all details you wish to track for creating displays, thanking donors and making informative bid sheets. Minimally, for the program to work you need to enter an item **Title** (e.g. watch), a **Type** (e.g. silent vs**.** live auction item)**,** as well as an **Item Number** according to which the item can be tracked and bid on.

To key in item details, click on **Items** on the top navigation menu or the dashboard.

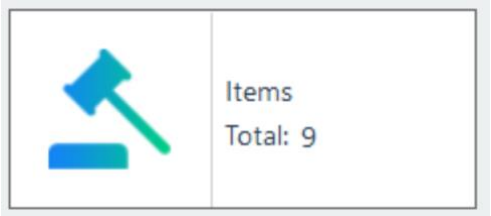


Figure 31 Items Button on Dashboard

The ITEMS window will appear with a table displaying a list of items and their details, as pictured below.

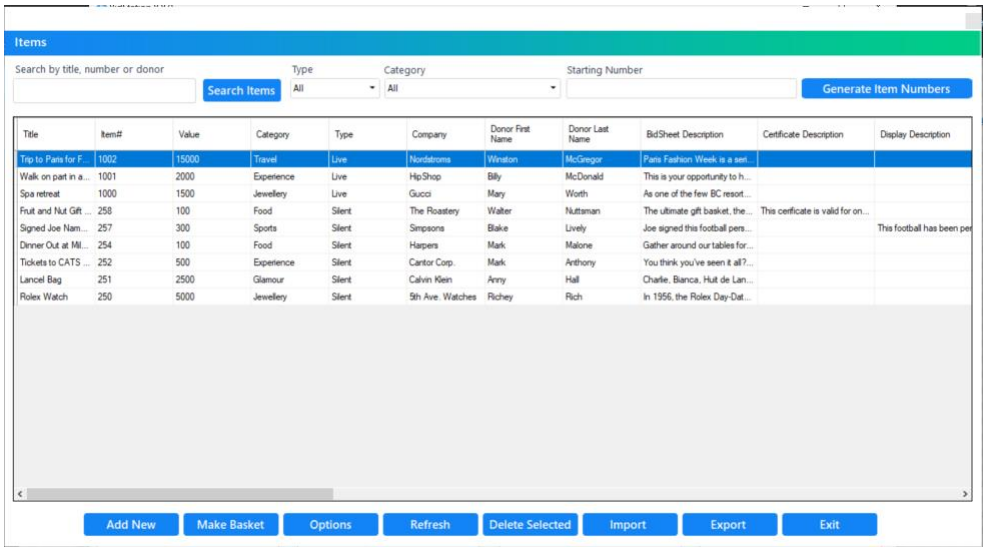


Figure 32 Items Screen

Data can be entered directly in each item's profile, or you can import ITEMS data from an Excel spreadsheet or a CSV text file. Refer to the **Items Database Fields** and **Items Conventions** tables in this document (sections 7.2 and 7.6) for explanations of the fields and specific requirements for importing and functionality.

9.1. Required vs. Optional Fields for Items Data

Only **Title, Item Number** (referred to as **CatalogueNumber** in the database) and **Type** (**Basket, Live** or **Silent**) fields are required to hold an auction. (To import items into Bidstation, only Title and Type are required, allowing for automatic Generation of Item Numbers in the Bidstation program. See section 9.3). The remaining data fields are optional but are necessary for the creation of custom documents such as bid sheets, thank-you letters and labels, and are mandatory for creating these documents using the software.

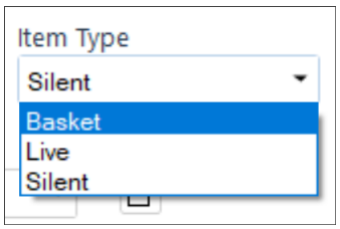


Figure 33 Item Type Drop-down Menu

You can review and delete individual ITEMS in each of the columns, as well as organize the items by column header (changing the order of columns as desired). However, to enter details for an individual item, or to edit details, you will need to open the item's profile window (by double clicking). You may therefore find it useful to enter most or all of the ITEMS data in an Excel spreadsheet and import it when it is complete. (See section 6.2, **Import Data**.)

9.2. Items Functions

What can be done from the ITEMS Window

The ITEMS window displays all the data entered for the items in your auction.

- Click and drag a header to re-order the column layout.
- Click a header to sort the table by that value.
- Right-click on selected record(s) to permanently delete one or more lines of data.
- Double-click to open an Item's profile and edit or add information there.

Creating Categories

While the Type of item (Basket, Live or Silent) is mandatory, you can also optionally create segments using customized Categories. After creating a **Category** for an item, you will be able to organize your items by Category (e.g. Segment 1, Segment 2; Jewelry, Dining Out, etc.). Once you create a category by typing it in the **Category field** of an item's profile, it will be available in the drop-down menu for selection when you add new items.

Adding New Items

To add a new item, click the '**Add New**' button at the bottom of the table. A new empty Item profile will open, and you can input the details.

Duplicating an Item description

You many have several of the same item in your silent auction. Yet each item will still need to be tracked as a separate item to be bid on. In such cases, it may be useful to duplicate an entire Item profile. This can be done by clicking the **Duplicate** button within the Item profile.

Note: A duplicate Item profile must be assigned a *new* Item number. The same Item number cannot be used twice in Bidstation. Duplicate item numbers will be rejected by the system. If imported, a duplicate number will be reassigned a zero (0). If this happens, a new, unused number can be manually assigned in the item's profile.

9.3. Generating ITEM Numbers

Item numbers may be added manually in each item's profile, or in an Excel or CSV file before importing. Item numbers may also be assigned automatically by entering a starting number and clicking the '**Generate Item Numbers**' button in the ITEMS window. Follow the yes/no prompts to complete the process.

Figure 34 Generate Item Numbers Button

Depending on your planned setup and bidding process, it may be helpful to assign a series of item numbers to differentiate auction segments by filtering using the drop-down fields at the top of the ITEMS window. Items can be assigned automatically by Category (user-defined), by Type (Basket, Live or Silent), or both: enter a starting number and select the filter(s) before clicking the 'Generate Item Numbers' button.

Note: Item numbers should be finalized before creating documents such as bid sheets.

What does an item number 0 mean?

If you have the number 0 in an Item Number column, it means the item has not been assigned a number. This can happen if you are entering Item numbers manually and forgot to enter one, if you imported Items without numbers, or if you imported duplicate numbers. You will therefore need to assign an item number.

9.4. Creating ITEM Baskets

Preparing donated auction items for optimal display often involves grouping smaller items into a single larger package called a **BASKET**. This process is easily achieved in Bidstation once individual items data has been entered.

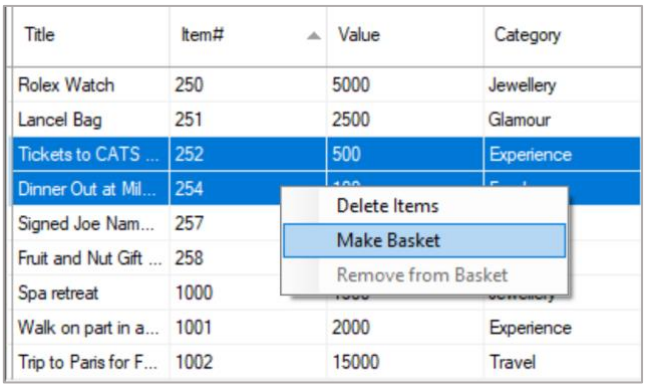


Figure 35 Making a Basket by Selecting Items

To create a basket, go to the ITEMS window and select the items to be included in the basket by holding **shift** or **ctrl** on the keyboard while clicking on the items to be included. Then **right-click** on one of the items selected to bring up a menu of options. Select **Make Basket**. A new item profile window will open containing the information from the items selected. Enter a **Title** and an **Item Number** for your basket and click '**Save**' to finalize creation of the basket. The total value of the basket will be calculated by adding together the values of its items, and donors for each item will be added to the Basket Donors field. Descriptions for each item will also be combined in the bid sheet description field. You may also edit descriptions after the basket is created if required. However, if the item grouping that makes up the basket needs to be changed, the basket must first be dismantled, or deleted, then rebuilt with the new selection of items.

Important: Once added to a basket, an item will display in a greyed out (disabled) format. Items that are added to a basket are no longer considered to be individual items in the program. Grouped items will *not* be included when producing item reports, when creating documents and when inputting winning bids. If you are printing thank-you letters for donors, keep this in mind and consider creating thank-you letters prior to making basket items as the grouped items will not be included in the thank-you letter data.

10. Entering ATTENDEES Data

10.1. Adding and Importing Attendees

Attendee information can be added manually in Bidstation or an Attendee list can be Imported using an Import Template in Excel or CSV file format.

To enter an Attendee's details manually, click the Attendees button on the dashboard.

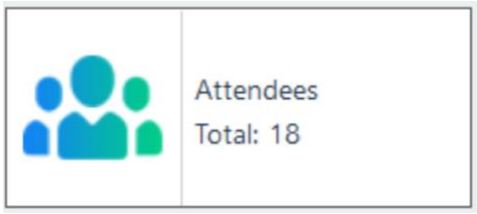


Figure 36 Attendees Button

An Attendees list will open.

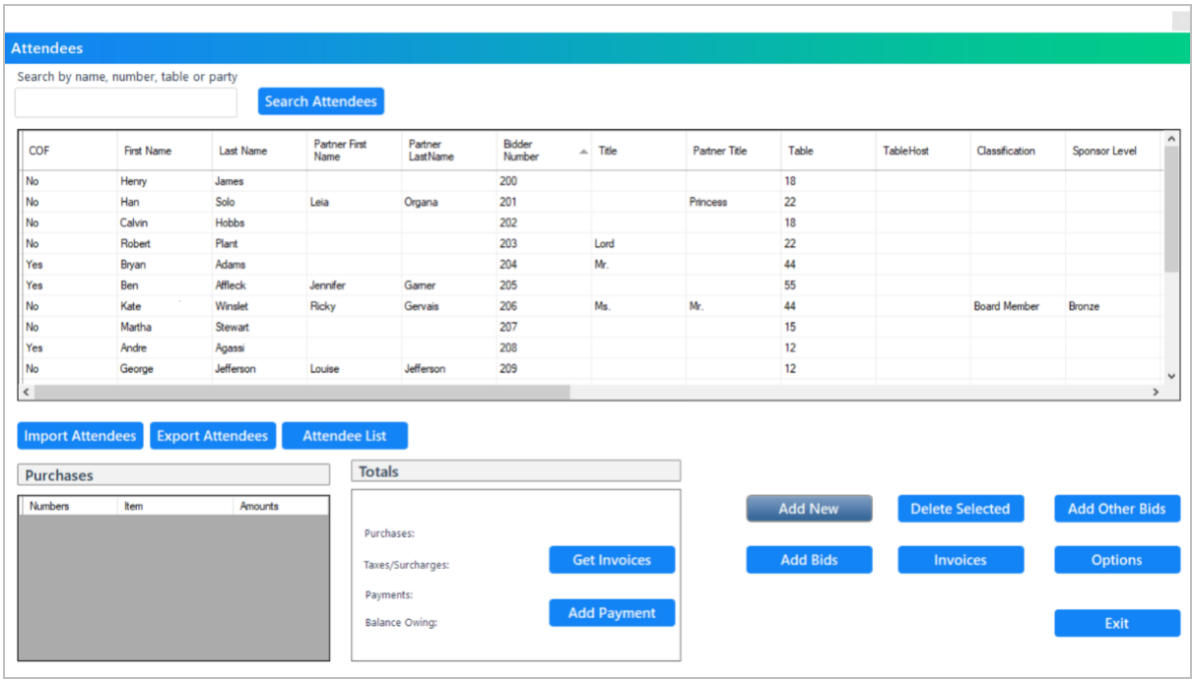


Figure 37 Attendees Screen

Click the Add New button to open a new, blank attendee profile (pictured below). Enter details in the fields including, minimally, **First Name, Last Name** and **Bidder number** which are required fields for running the auction. **Email address** is also recommended as it is required by Square for credit card payments, however it can be entered manually at the event.

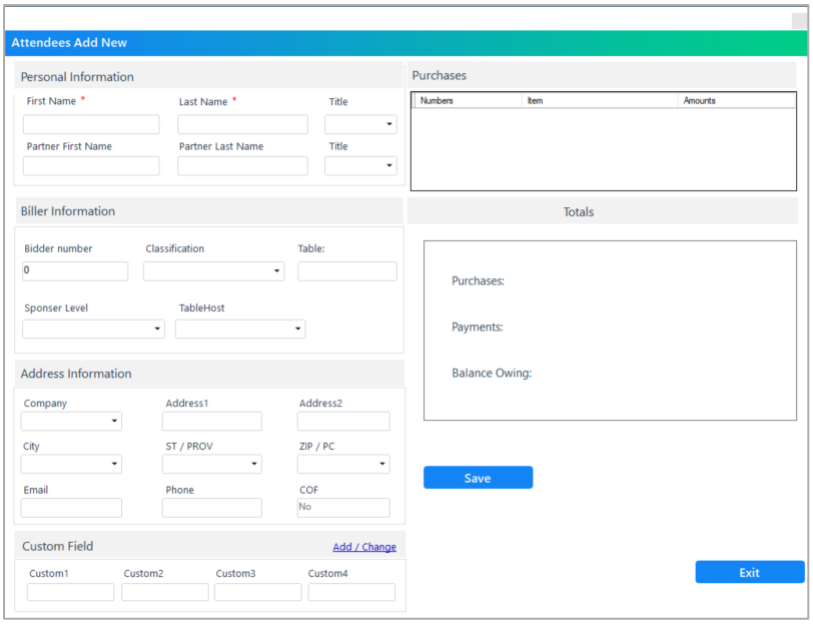


Figure 38 Blank Attendee Profile

10.2. Importing ATTENDEE List To import an Attendee list from an Excel or CSV file, use the Bidstation Import Template (see sections 7.3-7.5). Include the required fields (**First Name, Last Name**), as well as any other details you plan to gather. The Importing Attendees function can be used to **add**, **edit** or **delete** individual Attendees by importing a file with the most current and complete Attendee information.

REQUIRED FIELDS (to run the auction)

FirstName – Identifies attendee

LastName – Identifies attendee

Bidder Number – tracks all bids, purchases and donations made by an individual attendee

OPTIONAL FIELDS (allow creation of event documentation such as thank-you letters, labels and displays)

Title – e.g. Mr., Ms.

Partner First Name – to indicate a guest's companion

Partner Last Name – to indicate a guest's companion

Partner Title – e.g. Mr., Ms.

Bidder Number – Assigned manually or use the 'Generate Bidder Numbers' button in the Attendees window to automatically assign bidder numbers. Bidder numbers should not be changed once assigned, and ***cannot*** be changed once a Winning Bid, Other Bid or Payment has been entered in Bidstation.

Classification – e.g. board member, staff

Sponsor Level

Table Number

Table Host

Address

Email address –Recommended to save time at event check-in since email addresses are required by Square.

Consult section 7.5 for data entry conventions required to Import an Attendee list and section 6.2 for instructions on **Importing**.

10.3. ATTENDEES List Functions

From the Attendee list, the following functions can be performed:

Add – Creates a profile for manually entering a new Attendee's information.

Import – Allows user to browse for a file containing an Attendee list and import it.

Export – Exports data to Excel or CSV file format. The file can be saved to a location of your choice.

Attendee List – Produces a printable list of Attendees.

Search Attendees – The Attendees search allows the user to search for a guest using different criteria (name, number, table or table host)

Exit – Closes Attendees window with all changes saved.

In addition, two shortcut buttons, **Add Bids** and **Add Other Bids**, open pop-up windows to review or make changes to Winning Bids and Other Bids without closing the Attendee screen.

10.4. Generating ATTENDEE Bidder Numbers

Bidder numbers can be added manually, or they can be assigned automatically using the **Generate Bidder Numbers** button in the Attendees window.

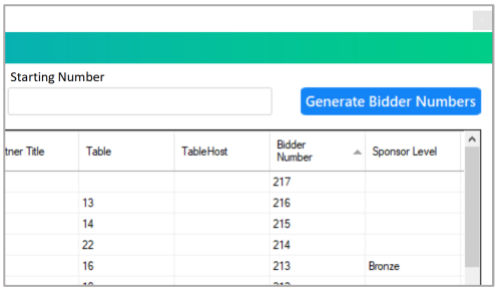


Figure 39 Generate Bidder Numbers Tool

Enter a **Starting Number** for the Bidder series in the indicated field, click **Generate Bidder Numbers** and follow the yes/no prompts to confirm. Duplicate Bidder numbers are not permitted in the system.

Consider assigning a series of bidder numbers to differentiate pre-registered attendees, volunteers, etc. if this will be helpful for the registration process.

Note: Attendee Bidder Numbers can be assigned in Excel when attendees are first created, and imported via a Bidstation template, if preferred. If you have already assigned or imported bidder

numbers, verify re-numbering is desired before selecting **Generate Bidder Numbers**. New, unique, bidder numbers may be added for new attendees at the event.

11. OTHER BIDS: Preparing Receipt Tags

Silent auction events often include items for purchase that are not part of the silent auction, such as floral centerpieces, raffle tickets and donations. An event may also include fundraising activities in addition to the silent auction, such as wine pulls and fund-a-need (raise a paddle) pledges. These items and activities are called '**Other Bids**' in Bidstation.

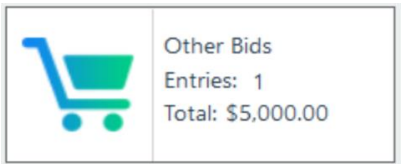


Figure 40 Other Bids Dashboard Button

Other Bids do not have bid sheets or item numbers and so they cannot be tracked in the same way as auction items can. However, they do still need to be entered in the Bidstation software program before the invoices can be finalized.

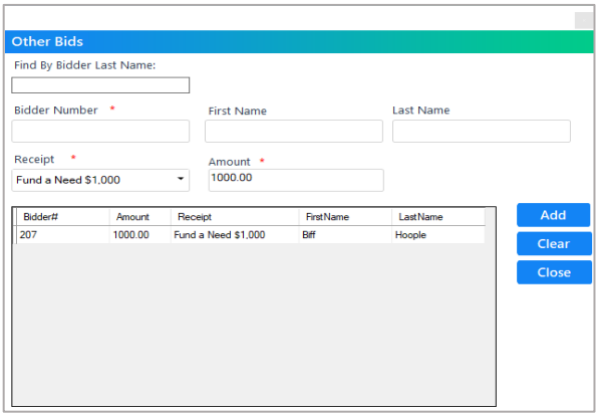


Figure 41 Other Bids Screen

To prepare for data entry of Other Bids at the event, it is useful to create an inventory of Other Bids items in Bidstation in advance. These are called **Receipt Tags**. Creating Receipt Tags in advance of the event facilitates rapid data entry when time and speed are priorities at the event and helps with the timely preparation of Invoices.

Making Receipt Tags involves creating a drop-down menu of labels or tags for all planned non-auction items and fundraising categories at your event. When the time comes to record Other Bid purchases and donations, you will only need to select the Receipt Tag category and enter a series of bidder numbers.

11.1. How to Create Receipt Tags for OTHER BIDS

Select **Receipt Tag** using the dashboard icon, or from the navigation menu under **Other Bids**.

A **Receipt Tag** window will open which will be empty or will display a list of receipt tags if you have already created one.

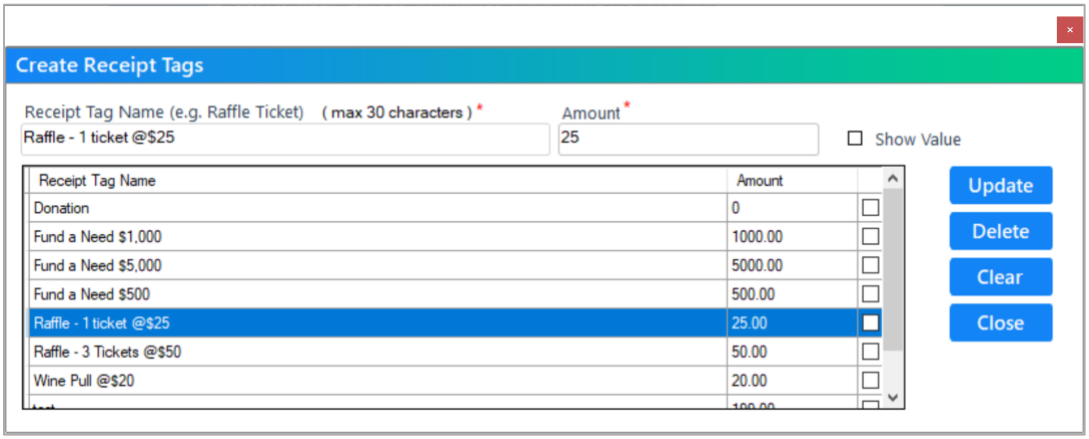


Figure 42 Receipt Tag Window

Enter the **Receipt Tag Name** in the **Receipt Tag Name** field.

Enter an **amount** to be charged for the item, or 0 for no amount (e.g. for ad hoc donations). The amount entered can be changed at any time using the **Update** button. For Receipt Tags created with a 0.00 amount, the amount should be entered when you are entering **Winning Bids**. Click the **Add** button on the right (or **Update** if editing, as shown above), or press **Enter** on your keyboard to save.

Check the **Show Value** box if you want the value of the item to appear on the invoice. This is primarily used for tax purposes. (By leaving the **Show Value** box unchecked, the invoice will not show any value and therefore the bidder may be eligible to receive a full tax deduction for the amount paid. Checking **Show Value** will cause the purchase value to show, which by default is equal to the amount paid and therefore no tax deduction is available.)

11.2. Required Conventions for Receipt Tags

The Receipt Tag Name field is limited to 30 characters. It is recommended that you name each tag with a unique first letter to facilitate drop-down menu use.

Receipt tags must be unique. Duplicate tags will not be accepted in the program.

A '**Show Value**' box is presented beside the Amount field. This should be checked if the amount is to appear on invoices under a value column.

Receipt Tags and Other Bids Amounts can be edited at any time. See section 17.3, Entering OTHER BIDS at the Event, for more details and for OTHER BIDS data entry instructions.

12. Planning for Payments

12.1. Types of Payments

Based on the auction event plan, guest payments for WINNING BIDS and OTHER BIDS need to be handled in an efficient, organized and documented manner.

Credit Card Payments: With Bidstation you can accept any credit/debit cards accepted by Square. Use of the Bidstation app's ExpressPay function (saving credit Cards on File) at registration is recommended for fast and efficient credit card processing. Payment information is automatically synced with Bidstation and charges can be processed any time, including in a batch after the event.

Cash/Check Payments: If accepting cash/check at or before the event, prepare staff/volunteers with appropriate cash handling procedures and security. Bidstation makes it easy to record all forms of payment to generate accurate invoices for attendees. Do this in the Bidstation app or in the software program during or after the event.

Partial Payments: Bidstation can accommodate guest payments that involve more than one form of payment. Regardless of the amount/type of bidder payment, ensure the cash or check payment is entered first, then assign the balance to credit cards as appropriate.

12.2. Saving Cards on File at Check-in (ExpressPay)

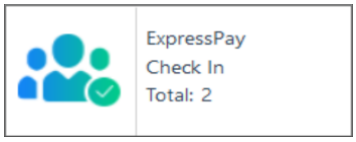


Figure 43 ExpressPay Report Button

Bidstation tracks all ATTENDEES who saved a Card on File at check-in. This ExpressPay feature greatly enhances the checkout procedure ensuring a quick and efficient conclusion to the event. Bidders can proceed directly to pick up their invoice and auction items as their payment information is securely on file. '**ExpressPay**' and '**Card on File – Go Directly to Pickup**' messages appear on invoice headers.

ExpressPay Check In Report: This report can be viewed directly from the dashboard and may be useful for planning checkout as it displays information that allows quick review of guests with Cards on File and amounts owing. Checkout may be expedited for guests who have a **Card Saved on File**, while any remaining guests who did not pre-swipe a card visit checkout.

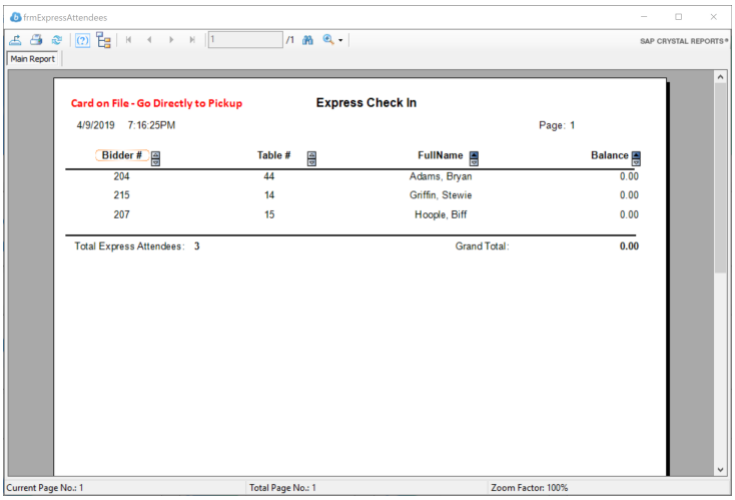


Figure 44 ExpressPay Report Displays Guests with Cards on File

For instructions on using the Bidstation app to check in guests and pre-swipe credit cards see section 18, **Payments and Using the Bidstation App**.

13. Finalizing Auction Preparations

This Bidstation manual continues with the assumption that the required Setup details, ITEMS data and ATTENDEES data have been entered, including the following key fields:

Attendee/Bidder First and Last Name

Bidder Number

Item Title

Item (Catalogue) Number

Item Type (Basket, Live or Silent).

These fields represent the minimum information required by Bidstation to allow the user to enter WINNING BIDS, to enter OTHER BIDS and to produce INVOICES that detail each guest's total purchases/amounts owed.

13.1. Checklist

At this stage you should have completed all data entry and database preparation for your auction:

1. Registered Bidstation
2. Set up Square to allow it to be connected to Bidstation
3. Entered Items
4. Entered Attendees
5. Prepared Receipt Tags for Other Bids (done to enable rapid entry of Other Bids at the auction)
6. Created any baskets that are planned, built from individual auction items
7. Created thank you letters for donors for any items that were used to build baskets (done while information for individual donated items is easily accessible)
8. Downloaded the Bidstation app to be used at the Event (available at the App Store)
9. Synced Bidstation with the app to enable the software and the app to work together
10. Become familiar with the process for saving a Card on File to avoid long lineups after the event.

The next step before you are ready for your event is document preparation, including especially the **creation of bid sheets**, described in the following section. You may want to test document production for one or two items and attendees before deciding what fields to use, to discover what will be most functional for your event. Many of the fields are optional, and they can be used in a variety of ways, but they can also be left blank or set to default. It is also recommended that you practice using the app to swipe cards before the event, to see that everything is functioning as expected, and to be prepared to explain how to use the app to volunteers/staff helping to run the event.

14. Preparing AUCTION DOCUMENTS

14.1. Types of Documents

Bidstation software allows the user to create documents such as bid sheets, displays and thank-you letters using pre-designed, customizable templates by merging selected Item and Attendee data in MS Word.

The most common document type is **bid sheets**, but examples of other documents that can be created include: nametag labels, donor thank-you letters, item labels, auction display materials, winning bidder posters and certificates.

These documents are prepared using information about items and attendees stored in Bidstation. Document preparation should therefore happen **after** you have entered all the information for items and attendees, with one exception: If you are making **baskets** out of items you may want to **prepare thank you letters to donors before you make baskets**, since the value and donor information is blended together in the Bidstation system once a basket is created, making it harder to separate out the relevant details for your thank-you letters.

Below you will find descriptions for:

14.2) **Exporting data from Bidstation to be used for document preparation in other programs**

14.3) **Auction document templates**

14.4) **Creating bid sheets and other documents using Bidstation templates: Basic procedure**

14.5) **Using Merge Document Filters to segment documents in groups**

14.6) **Editing merged documents**.

14.2. Exporting Data from Bidstation for Document Preparation

One way to create documents for your auction is to Export data into Excel to enable document creation through programs such as Microsoft Word, Google Docs, Pages or InDesign. If you already have a system for creating auction documents in one of these or another program, you can easily export Items and Attendees data from Bidstation from the File Menu (select Export) or using the Export button at the bottom of the Attendees and/or Items windows.

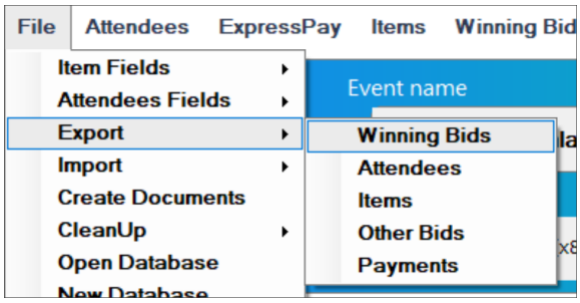


Figure 45 Export Items Selection Path

14.3. Auction Document Templates

Bidstation is equipped with many sample templates of typical auction documents to create final documents populated with specific event information. The files are located in the program and can be browsed through when you are **Creating Documents**.

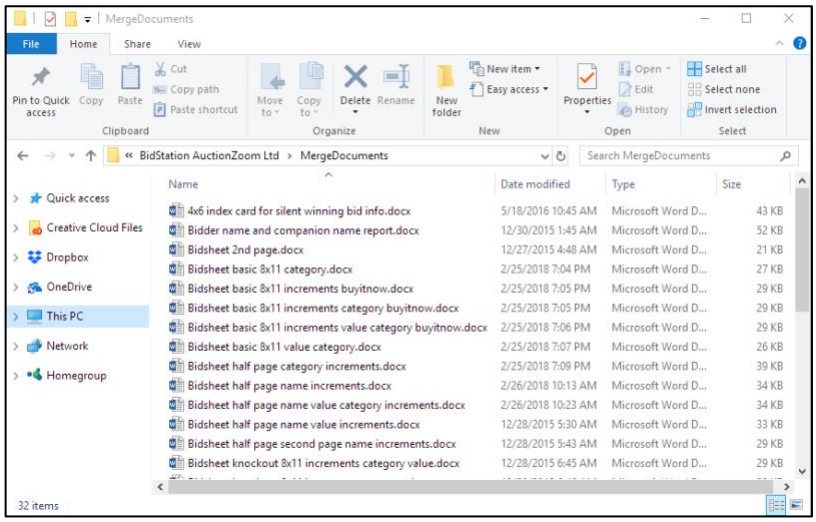


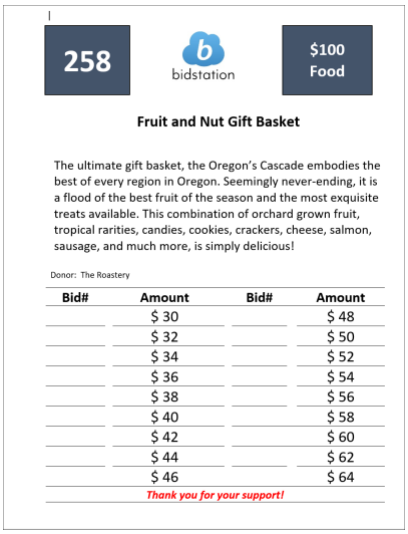
Figure 46 Sample Templates List

Templates can also be customized and saved with different formatting, logos and content as required.

Examples of Bid Sheets, Letters, and Certificates using Bidstation Templates

BID SHEET TEMPLATE:

There are several bid sheet formats to choose from and all bid sheet formats can be modified to meet specific needs. When you first create a bid sheet document, it will appear without customization. Customize it as you would like it to appear before saving, and when you merge your document with the information that has been saved in Bidstation, the design and formatting will apply to all your bid sheets.



258 bidstation $100 Food

Fruit and Nut Gift Basket

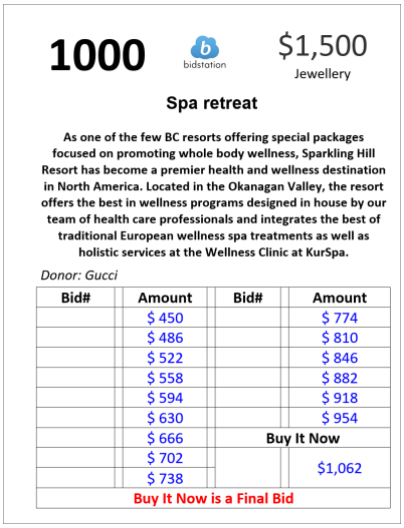
The ultimate gift basket, the Oregon's Cascade embodies the best of every region in Oregon. Seemingly never-ending, it is a flood of the best fruit of the season and the most exquisite treats available. This combination of orchard grown fruit, tropical rarities, candies, cookies, crackers, cheese, salmon, sausage, and much more, is simply delicious!

Donor: The Roastery

Bid#	Amount	Bid#	Amount
	$ 30		$ 48
	$ 32		$ 50
	$ 34		$ 52
	$ 36		$ 54
	$ 38		$ 56
	$ 40		$ 58
	$ 42		$ 60
	$ 44		$ 62
	$ 46		$ 64

Thank you for your support!

Figure 48 Sample Bidsheet



1000 bidstation $1,500 Jewellery

Spa retreat

As one of the few BC resorts offering special packages focused on promoting whole body wellness, Sparkling Hill Resort has become a premier health and wellness destination in North America. Located in the Okanagan Valley, the resort offers the best in wellness programs designed in house by our team of health care professionals and integrates the best of traditional European wellness spa treatments as well as holistic services at the Wellness Clinic at KurSpa.

Donor: Gucci

Bid#	Amount	Bid#	Amount
	$ 450		$ 774
	$ 486		$ 810
	$ 522		$ 846
	$ 558		$ 882
	$ 594		$ 918
	$ 630		$ 954
	$ 666	Buy It Now	
	$ 702		$1,062
	$ 738		

Buy It Now is a Final Bid

Figure 47 Sample Bidsheet with Buy It Now

For instance, after creating a custom template you can replace the logo with your organization's logo, change the colours, change the font or reduce font size, or alter the spacing in the description. In addition, there are several bid sheet formats to select from: standard (8.5 x11) with 18 increments; half size; bid sheets with or without value displayed, etc. You can try several to see which one will best suit your event. You can also optionally use the filters (described below), to select specific subsets of items before making a custom template, allowing for different designs and different information to be included in bid sheets according to auction section, type, category of item, or other parameters.

THANK-YOU LETTER TEMPLATE:

Like bid sheets, letters can be customized to suit the event. Customize letter content to meet the exact needs of the event by updating the paragraph text, changing the logo and modifying the closing as required, then save under a new file name. Letters can be printed on letterhead, if desired.

bidstation

April 9, 2019

Mary Worth
Gucci
34 anytstreet
Tunis, ID

Dear Mary,

Thank you for your donation of the following items for our auction held on September 1st, 2019.

Spa retreat - Value: $ 1,500.00

The amount we raised exceeded the goal of $130,000 we set to support our organization's projects.

On behalf of those who will benefit from your generosity and the rest of our members, thank you for contributing to our success.

Sincerely,

James Rockford
Auction Chairman

Figure 49 Thank-you Letter Template

AWARD CERTIFICATE TEMPLATE: If services are donated to the auction event without a certificate, it is straightforward to create a Certificate document for bidders to bid on using the following data for the item:

Item #

Item Title

Description

Donor

Contact Phone#

Once you create the certificate it can be customized by changing the basic text and including dates or other details relevant to the donated item.

SUPERGALA OF THE STARS 2019

Item # 1000 – Spa retreat

The bearer of this certificate purchased the above item at the Super Gala Fundraising Auction. Please contact the person indicated below to make arrangements for pick-up, fulfillment or scheduling.

Mary Worth
Gucci
(444) 555-6667

Auction Purchase Certificate

Figure 50 Sample Certificate

14.4. Creating Bid Sheets and Other Documents Using Bidstation Templates: Basic Procedure

The basic procedure for creating bid sheets and other auction documents using templates in Bidstation follows:

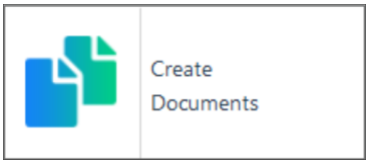


Figure 51 Create Documents Button

Open **Create Documents** from the dashboard icon or select Create Documents in the File Menu. A screen will open offering a number of Word merge filters in case you want to segment auction data and select a subset of items to make bid sheets for (according to item type, category, description or custom fields). **Do not select any filters unless you want to segment your data for document creation.** Click **Ok**. (See section 14.5 below for more details on selecting filters.) Select the document template you would like to create from the list presented (e.g. basic bidsheets, bidder paddle cards, display, etc.).

The template will open in Word, but it will not be formatted and will also not display properly until you preview it. Switch to that Word document and see how it will display by selecting '**Mailings**', and then '**Preview Results**' from the options displayed at the top of the screen in Word.

Make any changes you wish to make to customize your bid sheet template. Delete the Bidstation logo and replace it with your organization's logo. Adjust the font and layout as you would like it to appear using standard Word functions. When you finish making changes to the template, click '**Finish & Merge**', select '**Edit Individual Documents**' (both commands to be found at the top of the screen in Word), and you will be offered a choice to merge **All your Items** records, the **Current record**, or a set range of records. Select '**All'**, unless you have a specific range in mind.

The process is complete. Your complete set of bid sheets will be merged in one document that can be printed for your auction. Save your document to a preferred place for printing when you are ready. Keep the default name for your document or rename it, but if you rename your document, it should not contain the word '**bidder**' in it, unless the document is for attendees, in which case the name should contain the word '**bidder**'. (See rules for naming documents below.)

Follow the same process to create all other document types for items. For attendee labels, select templates with the word 'bidder' in the title.

Do not try to create a document when another created document is still open as it may cause an error.

Rules for saving documents:

When you have created your custom template, save it to a new location of your choice to avoid overwriting the default templates. Your new, customized template can be edited as you wish.

When saving your documents, you can rename your document, but you must use the word **bidder** in names for all documents that use ATTENDEE information (e.g. name tags), and **do not use the word bidder** in all other document names (e.g. bid sheets, displays). (The system will merge Attendees data for all documents with 'bidder' in the name and will use Items data for all other documents.)

Section 14.5 supplies further details on using filters to sort and select data when creating auction documents.

14.5. Using Merge Document Filters to Segment Documents in Groups

Merge Document Filters are used to set conditions on document merges according to **type**, **category**, **description**, or by other groupings identified in **custom fields**.

Using optional Word Merge Filters to segment data:

After you open Create Documents, but before you select a template, you have the option to select a number of filters that can be applied when you use Word merge to create your final document or document set. A screen labelled 'Merge Document Filters' will appear.

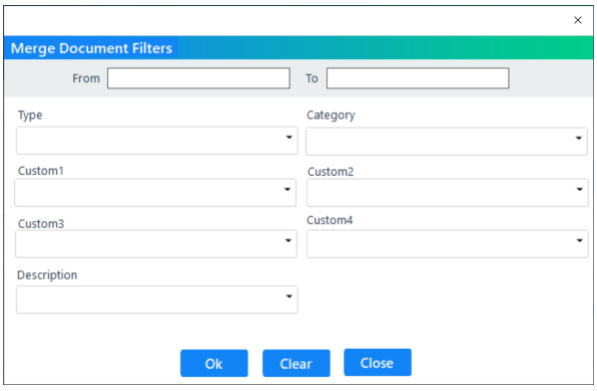


Figure 52 Merge Documents Filter Screen

In this screen, you can make selections of the filters you would like to have apply to the template you are creating in the moment. The merge document filters include: selecting a range of item numbers, type, category, description and custom fields. The most basic filter is by type – Silent, Live and Basket – but users may find other parameters useful.

If you are closing the auction in different sections, if you have your items grouped or categorized in different themes, or if you have other reasons for wanting to create different bid sheets for different groups of items, you can limit the set of documents you are creating to just one group at a time, perhaps applying different designs or using different templates for different groups or sections.

14.5.1. Merge Document Filters Summary

The merge filters are optional. Using them lets you limit and sort the data you will use in your document creation by segmenting according to type, category, description or custom fields. If you want to create bid sheets that are uniform for all items, then leave the section filters alone when the 'Merge Document Filters' screen opens and click 'OK'.

14.6. Editing Within Final Documents Created from Templates (Word Merge Documents)

It is possible to fix minor issues (e.g. last minute typos) in a customized template you have created. However, any changes to the document need to be manually updated in the source data for future use. Users are advised to become familiar with advanced functions using Word mail merge in a document to undertake this kind of change.

15. Preparing REPORTS

15.1. Types of Reports

Bidstation allows the export of data in Excel or Word report formats for printing or electronic distribution. All reports present data from **ITEMS**, **ATTENDEES**, **BID** or **PAYMENT** records, and each of these major report types has various sub-reports providing more detail from various perspectives.

Figure 53 Reports Button

Recommended: Users should review all report formats for guidance about which ones will be most useful for their auction at different stages.

Using the Reports Function:

Select **Reports** in the navigation menu bar or click the Reports dashboard button.

Choose a menu item to run the specific report.

A preview of the requested report will always display on the window prior to printing.

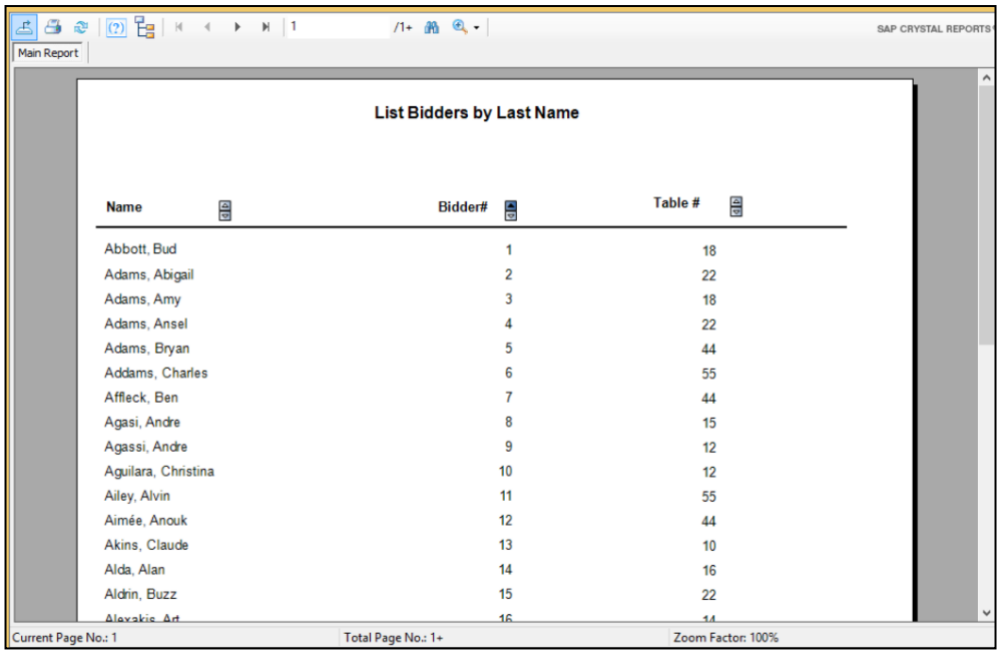


Figure 54 Attendee Report

15.2. Printing and Exporting Reports

Sorting Columns: Sorting columns is an available function in most report layouts using the sort buttons to the right of each header, as demonstrated in the image above.

Export Reports/Invoices: As well as exporting raw data, Bidstation also supports the export of formatted reports and invoices in a variety of file formats including Word, Excel and CSV. This is done from within the individual reports, which can be viewed by clicking the Reports button on the dashboard and selecting from the options to show the desired report.

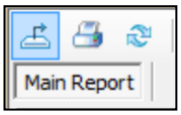


Figure 55 Export Report Button Selected in Crystal Reports

Once a report is displayed (in a Crystal Reports window), click the Export Report button left of the print button.

Detailed description of different kinds of reports:

15.3. ATTENDEE Reports

The attendee report options are available in drop-down menu format from the Navigation Menu and from the dashboard button.

Figure 56 Attendee Reports Menu

All ATTENDEE reports include <u>at least</u> the **Bidder Number (Paddle Number)** and can be viewed from three perspectives, as follows:

By Name/Bidder/Table Number for customized guest lists for registration, if required. In most cases, the standard Attendee report will work well.

By Classification (list and results), if used, to know more about the origin of donors and attendees.

By Sponsor Level (list and results), if used, to anticipate their requirements in the event plan.

15.4. ITEM Reports

All ITEM reports include at least **Item Title, Item Number** and **Bid Amount** (once entered/imported into Bidstation).

Figure 57 Item Report Menu

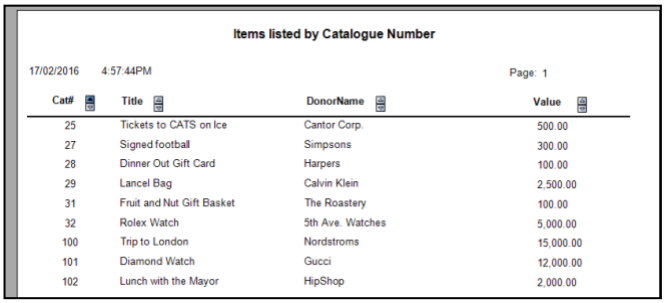
These reports may be useful for many auction processes including:

Before the auction, in cross checking that all ITEMS have been correctly entered.

During event setup to help organize the auction area(s).

After the auction to review the results for future planning.

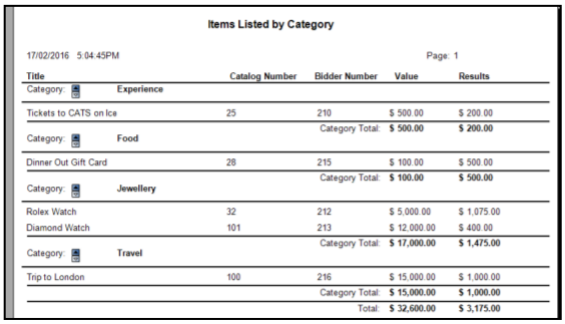
ITEMS reports can be viewed from three perspectives: by **Item Number**; by **Donor Name**; and by **Category**.



Items listed by Catalogue Number

17/02/2016 4:57:44PM Page: 1

Cat#	Title	DonorName	Value
25	Tickets to CATS on Ice	Cantor Corp.	500.00
27	Signed football	Simpsons	300.00
28	Dinner Out Gift Card	Harpers	100.00
29	Lancel Bag	Calvin Klein	2,500.00
31	Fruit and Nut Gift Basket	The Roastery	100.00
32	Rolex Watch	5th Ave. Watches	5,000.00
100	Trip to London	Nordstroms	15,000.00
101	Diamond Watch	Gucci	12,000.00
102	Lunch with the Mayor	HipShop	2,000.00



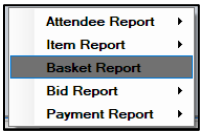
Items Listed by Category

17/02/2016 5:04:45PM Page: 1

Title	Catalog Number	Bidder Number	Value	Results
Category: Experience				
Tickets to CATS on Ice	25	210	$ 500.00	$ 200.00
		Category Total:	$ 500.00	$ 200.00
Category: Food				
Dinner Out Gift Card	28	215	$ 100.00	$ 500.00
		Category Total:	$ 100.00	$ 500.00
Category: Jewellery				
Rolex Watch	32	212	$ 5,000.00	$ 1,075.00
Diamond Watch	101	213	$ 12,000.00	$ 400.00
		Category Total:	$ 17,000.00	$ 1,475.00
Category: Travel				
Trip to London	100	216	$ 15,000.00	$ 1,000.00
		Category Total:	$ 15,000.00	$ 1,000.00
		Total:	$ 32,600.00	$ 3,175.00

Figure 58 Item Report Examples

15.5. BASKET Report



This report is useful for viewing a summary of basket items that have been created in Bidstation. The report displays donors and item numbers that are grouped into each basket.

15.6. BID (Purchase) Reports

BID reports show the **winning bids** and **other bids** (all transactions) from the auction event. They include at least a **bid amount** or **bidder name/bidder number** in various ways resulting in the most diverse list of reports in the system.

Once any bids have been entered into Bidstation, these reports can be generated and exported to the desired file format, as described above.

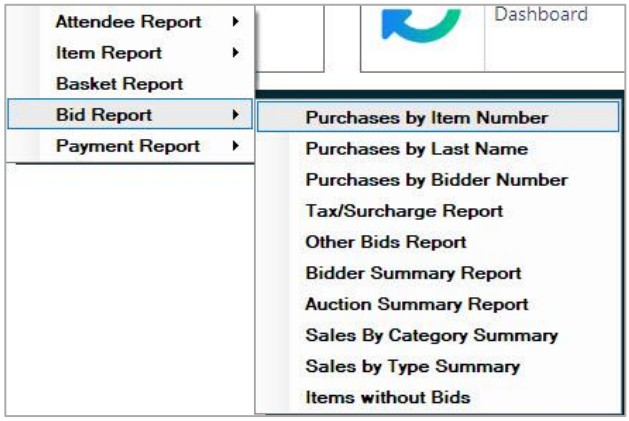


Figure 59 Bid (Purchase) Report Menu

BID REPORT	REPORT RESULTS (*default sort order can be changed on headers)
PURCHASES BY ITEM NUMBER	All ITEMS receiving bids, printed in Item number order, sortable by Item#, Title, Bidder#, Attendee and Price.
PURCHASES BY LAST NAME	All winning bids and purchases (Other Bids) by Attendees organized by last name, A-Z.
PURCHASES BY BIDDER NUMBER	All winning bids and purchases (Other Bids) organized by Bidder Number
TAX/SURCHARGE REPORT	Purchase/surcharge amounts, in auction category order, if applied to ITEMS.
OTHER BIDS REPORT	List of all non-auction purchases and donations, in receipt tag order.
BIDDER SUMMARY REPORT	Total due per Bidder, useful for payment processing verification.
AUCTION SUMMARY REPORT	Summary of event activity, subdivided by type/category (e.g. Silent Auction, Live Auction, Taxes, etc.)
SALES BY CATEGORY SUMMARY	Total sales by auction category, if applied when ITEMS are created.
SALES BY TYPE SUMMARY	Sales by Type (Basket, Live or Silent).
ITEMS WITHOUT BIDS	ITEMS that did not receive bids; in order of Item number; use for inventory and records.

If desirable, Bidstation reports can be also exported into Excel for formatting or analysis as required.

15.7. PAYMENT Reports

There are three types of Payment reports and each shows the Bidder Name, Bidder Number, and amounts due and/or paid. The balance should result in zero for each attendee when reconciled.

All Payments Report - Best if multiple methods of payment are accepted. This report will only display records if a payment has been recorded. Attendees/bidders without a payment on file will not be displayed. Bidders who have overpaid will also be shown with the amount in negative value.

Credit Cards Only Report - In contrast, if most payments are made by credit card, this view helps eliminate any other payment methods for easier review if troubleshooting.

Balance Owing Report - Will summarize and display only bidder records that have a balance owing, including partial amount, for resolution.

PAYMENT Reports are perhaps the most important to understand. They can be generated efficiently at the auction in case there is a need to respond to questions from staff or guests.

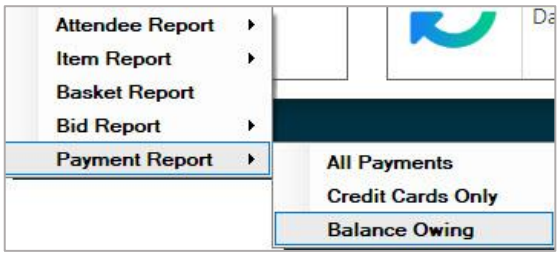


Figure 60 Payments Reports Menu

PAYMENT REPORT TYPE	REPORT RESULTS (default sort order can be changed on headers)
ALL PAYMENTS	All PAYMENTS processed, in bidder number order, with a count by type of payment.
CREDIT CARDS ONLY	All credit card payments, printed in bidder number order.
BALANCE OWING	All Attendee records with balances owing. If no balance is owing, Attendees will not appear on this list.

Below are 3 examples of payment reports. The credit card view below may be valuable for export for comparison to records from the merchant account for reconciliation.

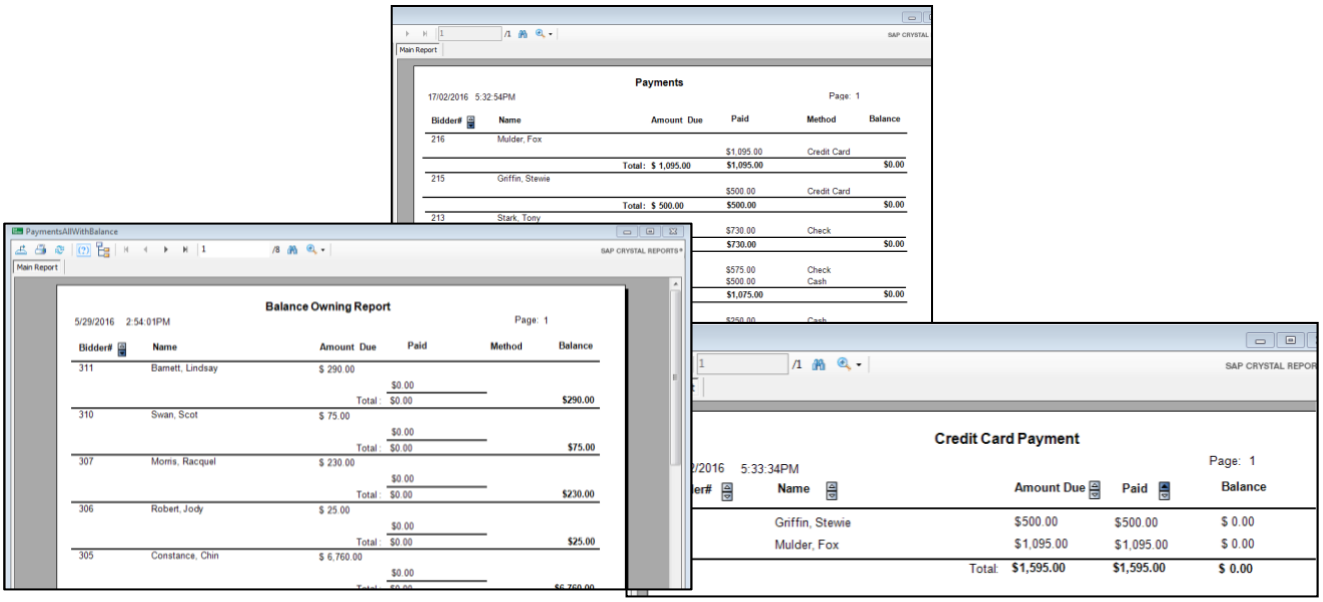


Figure 61 Payment Report Examples

15.8. Printing Reports: Before / During / After Event

All reports generated for purchases or bidders are recorded with the time of printing indicated in the footer.

Consider the use of reports at various stages of the auction:

Before the Event: Preparation

To verify data readiness of ITEMS, ATTENDEES and OTHER BIDS RECEIPT TAGS.

To produce item bid sheets that reflect appropriate starting and incremental bids.

To gather/store all the auction item data and organize the silent auction area.

To determine the usefulness of certain custom fields to improve event reporting.

During the Event: at Check-in/Checkout and After Auction Close

To prepare for check-in with printed ATTENDEE lists by last name and Bidder Number.

To provide Bidder Numbers to ATTENDEES.

After auction segments close, to **display winning bidders lists** or to **distribute winning bidders lists** to tables.

For the checkout process, to identify non-ExpressPay Attendees (those who still need to provide a form of payment).

After the Event: Post-Event Reconciliation

To reconcile items with invoices, and payments with attendees, to balance calculations.

To review for financial results.

To create thank-you letters and tax receipts for guests and donors.

To report on specific categories and levels of proceeds for future planning.

15.9. Refresh Dashboard Button:

While database information is saved as soon as a data record is entered, there are times when refreshing the Dashboard is useful. For instance, when running reports, changes made to a bidder's record will affect dashboard totals. Select **Refresh Dashboard** to update the results view.

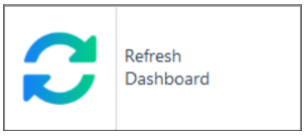


Figure 62

Note: Payments should match the Grand Total, including any taxes/surcharges, when the event is fully reconciled. If there is a discrepancy, start by checking Payment reports to ensure all bidder amounts due on invoices have been reduced to zero (confirming full payment has been made for all purchases).

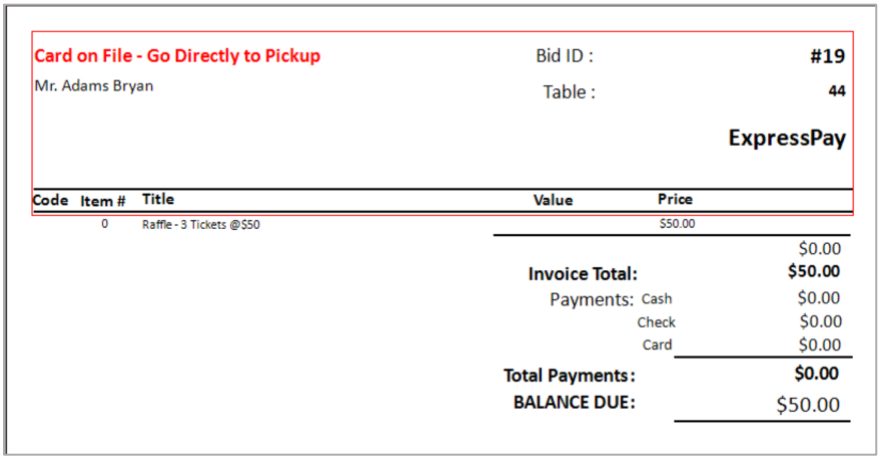
16. Preparing and Sending INVOICES

16.1. Types of Invoices

Bidstation creates one of two kinds of invoices, depending on payment type:

Card Saved on File:

- Credit card pre-swiped at Check-in.
- Invoice heading marked 'Card on File – Go Directly to Pickup' (in red).
- Successful bidder can go directly to item pickup area.



Card on File - Go Directly to Pickup
Mr. Adams Bryan

Bid ID : #19
Table : 44

ExpressPay

Code	Item #	Title	Value	Price
	0	Raffle - 3 Tickets @$50		$50.00

		$0.00
Invoice Total:		$50.00
Payments:	Cash	$0.00
	Check	$0.00
	Card	$0.00
Total Payments:		$0.00
BALANCE DUE:		$50.00

Figure 63 Invoice – Card on File Displays in Heading

Card NOT Saved on File:

- No pre-swipe.
- No 'Card on File' status in invoice heading.
- Successful bidder goes to checkout for payment first, then to item pickup.

The **Invoices** button appears on the dashboard with a drop-down menu of all invoice types. One or more invoices can be generated, saved, converted to PDF, and exported as needed.

Create invoices according the type (e.g. by table number, by bidder number, etc.) that is most useful for your purposes.

Common reasons to create invoices include:

- For Guest Departure – to identify pre-swiped guests distinctly from those who need to provide payment at checkout.
- For Auction Closing – to isolate Silent and Live auction segments for closing times.
- For Distribution – to guests on paper or via email at the event or after.
- For Archiving – to print/store invoices as final event documents of record.

16.2. Creating Invoices

Select Invoices from the navigation menu or use the **Invoices** dashboard button.

Select an invoice display/print option from the following choices:

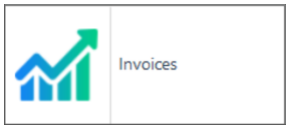


Figure 64 Invoices Button

FORMAT OF INVOICE SERIES	PRINT RESULTS
BY BIDDER NUMBER	Prepares invoices for all bidders who have purchased any item in order of bidder number.
BY TABLE NUMBER	If the event includes table numbers, it is possible to print invoices organized by Table Number to deliver them to the table as a courtesy to guests.
ONLY EXPRESSPAY INVOICES	Prepares invoices for only those Attendees with a card Saved on File. With this invoice, guests can pick up items and leave without having to pay.
ONLY NON-EXPRESSPAY INVOICES	Prepares invoices for Attendees with no card on file. Print these invoices at the event and bidders can pay at checkout.
ONLY LIVE AUCTION INVOICES	Prepares invoices for all bidders who won ITEMS in the Live Auction only. The invoice will include all the items from the live auction as well as silent auction items and Other Bids per bidder.
SINGLE INVOICE BY BIDDER NUMBER	Prepares single invoice by specifying Bidder number when prompted.
EMAIL INVOICE	Allows user to create cover email message, set other parameters and send invoices to bidders who have an email address on file.

Note: If using a network at the event, wait for each invoice report to finish before running another report to avoid network conflicts.

Preparing Invoices Organized by Secondary Groupings: Invoices may also be generated by other groupings, which may be advantageous for printing distribution at event.

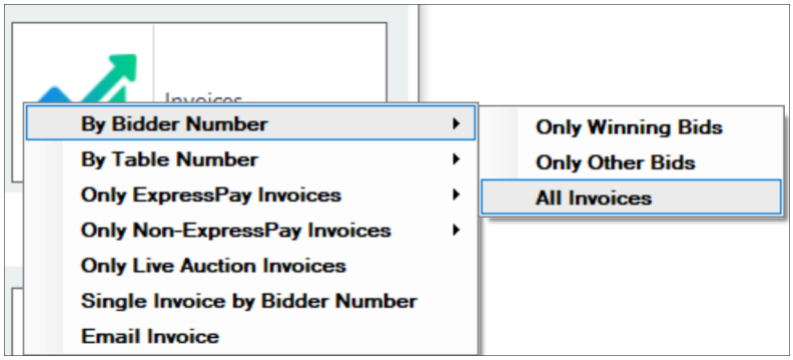


Figure 65 Invoices Menu

For example, you may want to print only invoices for attendees who won a silent and/or live auction item to cut down on printing time. (OTHER BIDS purchases may increase the printing time significantly if there are many more invoices with other bids than auction items.)

16.3. Invoice Distribution to Attendees

Planning how and when you will distribute invoices is central to the auction plan. For instance, if Attendees are required to save a credit card on file at registration/check-in, then there will be less planning needed to handle Non-ExpressPay invoices on time for checkout. If guests are assigned table numbers, then distributing invoices by table number is an option. Guests may not always remember whether they saved a credit card on file, so the distribution of invoices is helpful in guiding guests to the appropriate place for checkout/item pickup.

Invoices may also be distributed electronically during or after the event. After the event distribution allows for a final invoice (after payment processing) and accompanying thank you note.

16.4. Reviewing Invoices for Payment Reconciliation

For reconciliation, run a **Balance Owing** report (under Payment Report in the Reports window) to check that all bidder invoices have a zero balance. This will give you a summary view of which bidders still have balances owing. If the balance is zero, you probably don't need to review invoices. If the balance is not zero, compare your Payments total to your Grand Total.

Figure 66 Bottom Row of Dashboard – Payments Total and Grand Total Display

If your **Grand Total** is higher than your **Payments Total** there is still a balance owing which means that payments are still outstanding. Consult the **Balance Owing** report for follow-up with bidders who still owe money.

If your **Payments Total** (dashboard, bottom left) is higher than your **Grand Total** (dashboard, bottom right), there may have been an overpayment, or a purchase was not recorded. Review invoices to check for overpayment, resolve the discrepancy by removing any overpayments or adding missing purchases. Prepare a corrected invoice and distribute it.

If you need **to process refunds**, log in to Square's dashboard to process credit card refunds and manually adjust payment records in Bidstation (in the individual payment record for the bidder in the Payments window).

16.5. Archiving Invoices

Electronic: Generate a final invoice file after reconciliation is complete to archive for future planning or review. Use the **Invoice** dashboard button and select '**By Bidder Number**' to create a single document of all final invoices. Save the file as a PDF document for easy reference if required.

Paper: It may be useful to retain a paper control copy of all final invoices for reconciliation and audit to protect against the potential loss of electronic records.

16.6. Emailing Invoices

Bidstation makes it simple to send invoices to groups or individuals provided these conditions are met:

An **email address is stored** with the bidder record *and* the bidder has **made a purchase** of some kind (an Other Bid purchase/donation and/or a Winning Bid).

The 'Email Invoice' function in Bidstation will attach a PDF copy of the specific invoice that is identical to the printed copy. It will also include payment information for the specific guest receiving the email.

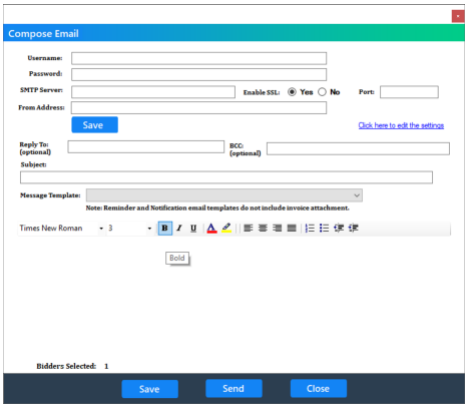


Figure 67 Email Invoice Window

Invoices may be emailed at the event as part of the bidder notification effort and/or after the event once payments have been processed. By sending email invoices after payments are processed there is an opportunity to once again thank bidders for their support and to provide a statement that is now updated with payment information and balance owing, if any.

16.6.1. Email Setup

Sending invoices via email requires some setup. To use this function, valid SMTP email sending credentials must be provided**.** *The email server used by your organization provides SMTP service.* Most email providers, i.e., Gmail, Yahoo, etc., impose sending limits that likely fall below event requirements. Please check with your provider and send by smaller groups if needed. If you need a transactional email server credential to allow for larger volumes (e.g. +1,000/per hour) you can send a request to AuctionZoom's support team.

Note: Email setup must be completed and fully tested prior to use if it will be in operation at the event.

16.6.2. Email Setup Steps

To set up the SMTP settings for emailing invoices:

Click the **Invoices** button on the dashboard and select **Email Invoice.**

Select at least one bidder with an email address in their record and a purchase recorded. (If no bidders appear in the window it means that you have no bidders with both an email address and a purchase recorded in Bidstation.) For testing email functions, organizers should select themselves here, as described below. Click **Next**.

Enter SMTP server details in each field according to the server's settings. (These are standard details an IT administrator can provide.) Click **Save**.

To edit the SMTP server details, or if some data has already been entered, select the link '**Click here to edit the settings**'.

Test the settings by sending a sample invoice to yourself. (The email will be sent to the email address of the Attendee you selected during setup. You will therefore need to have created a real or test Attendee profile for yourself or for someone in your organization, and to have entered a winning bid or other purchase, to test the email function. Remember to remove this profile before you reconcile payments.)

All selected bidders will be sent their specific invoice in PDF format.

16.6.3. Sending invoices via email to guests

To send invoices via email to guests, confirm that the SMTP settings have been set up and are functioning, as outlined in the previous section. Invoices must contain 30 items or less to be sent by email. If a single invoice has more than 30 items, save and send it separately as a pdf.

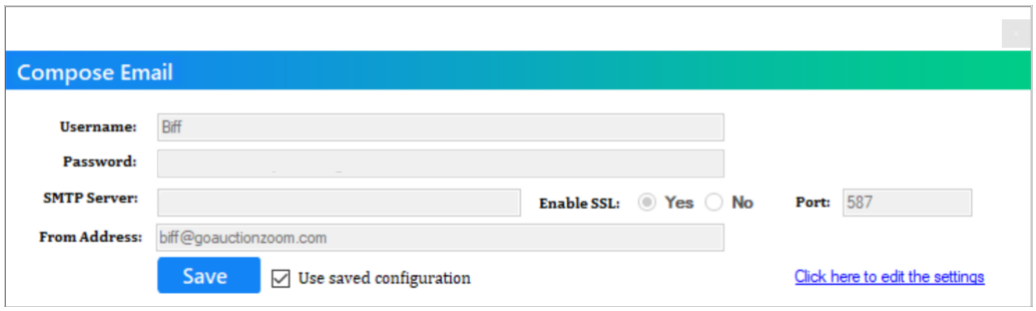


Figure 68 Email Invoice Settings

The email invoice function will be ready for use with the following steps:

1) Ensure computer has access to the Internet.

2) Click **Invoice** dashboard button; select '**Email Invoice**' option.

3) Select the Bidders who are to be sent Invoices.

4) All attendees will initially be visible in the window because the Email Invoice function may also be used to send other notifications to bidders with email addresses (e.g. event reminders). **Filter for Invoices** by checking the box '**Attendees with invoices**'.

5) **Select any individuals** who should receive the emailed invoice

or

Select the full list by clicking the box in the header row at the top

or

Search for an attendee by bidder number or name if known to select a single invoice to send by email as required.

Note: If an email address is missing from an Attendee's record, the Attendee record will still be displayed (because the bidder has an invoice), but without an email address, the attendee will be skipped even if selected.

6) After selecting recipients, click **Next** to open the email message-editing window. With the SMTP setup complete in the upper section (grey), prepare the email sending options noting the following guidelines:

COMMAND	PURPOSE
REPLY TO	**Optional**; you may enter an email address other than the From Address in this field, to be used for recipients who click reply to send a message back to you.
BCC	**Optional**; you may use for event control copy of email sent to the guest.
MESSAGE TEMPLATE	Select an email template: **Invoice email, Reminder email** or **Auction Notification email.** **Invoice email –** This is the only template choice that will generate an invoice and attach it as a PDF. The other message templates will not generate and attach an invoice. **Reminder email** and **Auction Notification email** – These are customizable templates for sending messages to some or all attendees (e.g. event reminder, order notification, etc.).
SUBJECT	Enter the subject for your email. This is filled with a default subject when you select a template. Change the default subject to preferred text that will appear in the subject line of the recipient(s)'s email. (e.g., *Event Name* Invoice – Thank you for your support!)
MESSAGE	A default text will appear at first. Delete this text and create/paste a prepared email message for recipients in this box. Before sending, there is an option to save the changes for repeated use. To personalize a message, use the following string in the place where an addressee should appear, as follows: Dear $Bidder$ The Attendee's name will appear in the invoice anywhere you use this string/tag.

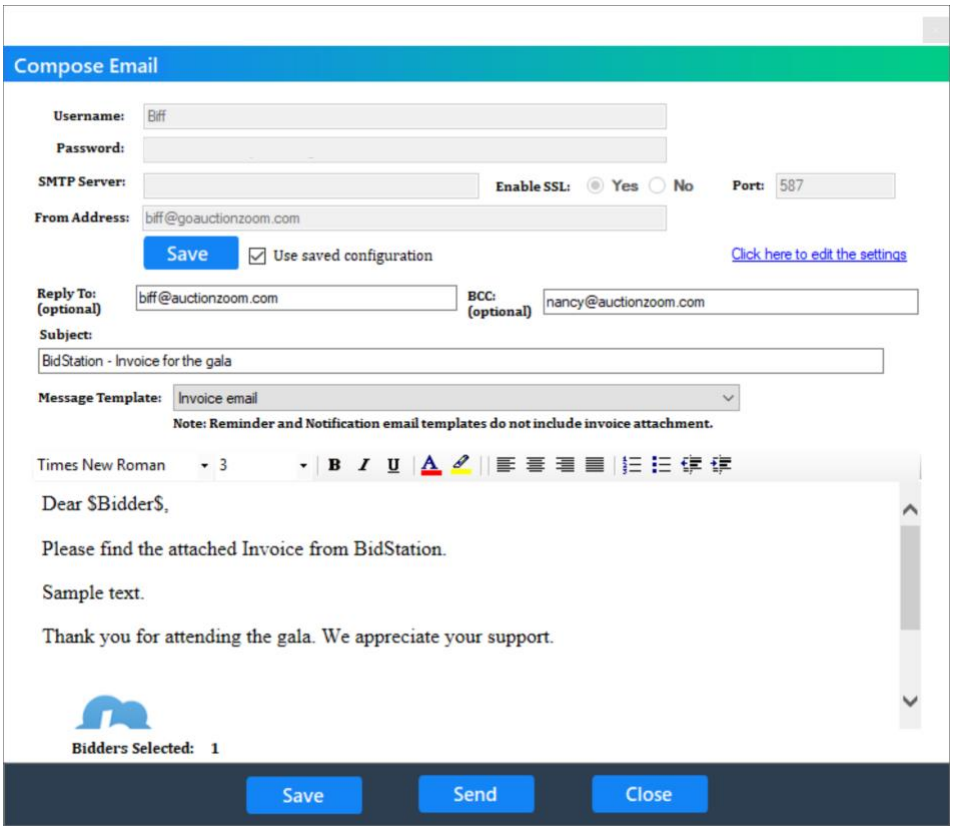


Figure 69 Email Template

To summarize, perform the following steps to send email to selected bidders with invoices attached:

- First test the email by sending one or two to yourself or someone in your organization.
- Enter **Reply To, BCC** email addresses as desired.
- Enter the email **Subject**.
- Select the **'Invoice email'** message template. (PDF invoices will be added to the email.)
- Create/Paste the email **message content** as required in the email body.
- Click **Save** to update the template with the changes to the body of the email.
- Click **Send** when ready for the email to be delivered.

Note: For the attendee first name to appear in the email body, the tag '**$Bidder$**' must be used. (e.g. Dear $Bidder$). This tag will merge any data in the first name field to be inserted into each email. Consider this if using a name format such as 'Sean & Carrie' in the first name field of your ATTENDEES and plan accordingly.

17. Entering Bids at the Event

17.1. Entering Bids (The Clerking Process)

During the event, Winning Bids for silent auction items and Other Bids (all other purchases and donations) will need to be entered in Bidstation before Invoices can be finalized. It is important to

practice entering bids or to establish a procedure for entering bids prior to the event. What procedure is used will depend on factors such as auction size, number of items and other bids categories, and number of volunteers.

General recommendations for bid entry at the event:

- Have a dedicated space for bid entry, away from the main activity.
- Allow for sufficient time to enter bids and prepare and produce invoices before the event ends.
- Enter winning bids, purchases and donations as soon as possible after an auction, section or other activity closes.
- Winning bids and Other bids can be entered in any order.
- Use enough data input computers for the size of the event.
- Include time for verifying data.
- Printouts should be made and checked before releasing the information to the attendees.
- Prepare the staff/volunteers to enter bid information as received and ensure the data entry tasks are not pushed to the end of the event. It is important to enter winning bids, purchases and other donations as early as possible to allow for timely production of invoices and smooth checkout.
- Quick data entry may best be achieved by using a two-person system (with one person reading the auction BID sheets/OTHER BIDS tally sheets, and another person inputting data).
- Use the Tab key to move quickly between fields.
- Use computer keys for speed/accuracy (not mouse).

17.2. Entering WINNING BIDS

Note: This task is for Auction Items only and is done quickly as auction segments close, during the event.

Collect bid sheets after the auction or auction segment closes and for each item, enter the **winning bid amount** and the **bidder number** of the Attendee who bid that amount. When you enter a winning bid for an Attendee/bidder, the amount is automatically added to the Attendee's invoice.

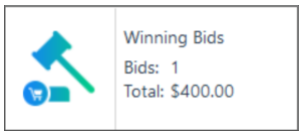


Figure 70 Winning Bids Button on Dashboard

For quick access to enter winning auction bids, click on the **Winning Bids** button

on the dashboard to open the window, and enter the following for each bid:

Item Number.

Bidder Number.

Winning bid amount.

Press Enter to save a winning bid.

Data Entry Tips:

Enter partial last name to select bidder from list.

Amounts: Use numbers/decimals for cents, if needed; no dollar sign or currency formatting.

Edits: Click a record in the table to return to entry fields; make changes; click the **Update** button.

Delete: Delete is used to eliminate a record.

Sort: Click headers to rearrange columns for viewing.

Columns: Click to reorganize by dragging the header.

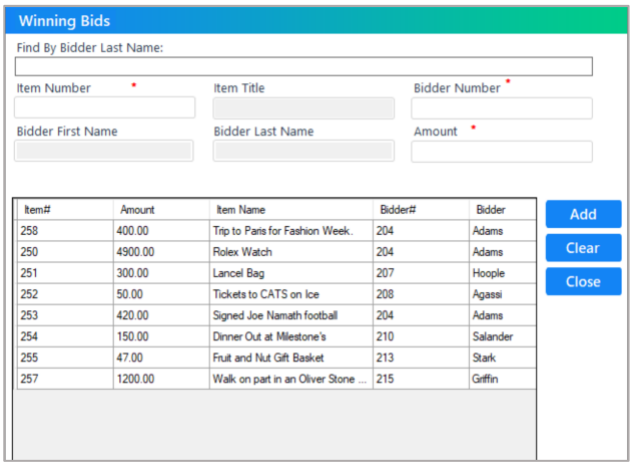


Figure 71 Winning Bids Entry Screen

Enter data efficiently using tab when time is of the essence during the event.

NEW AUCTION ITEM?

The system delivers a prompt when an item number not in the system is entered.

This allows users to choose how to respond: to revise that entry (in case of an entry error), or to create a new item.

If Yes is selected, an Item window opens.

Create a new item; enter the bid for that item without stopping the bid entry process.

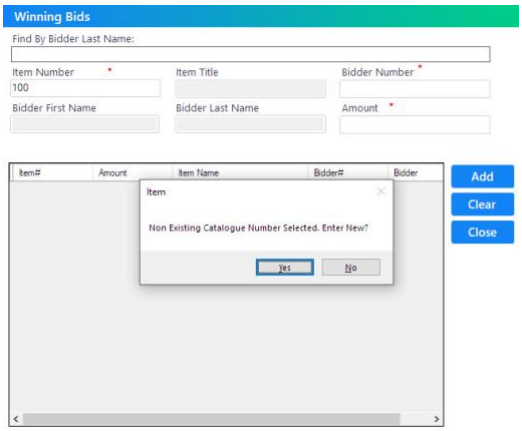


Figure 72 Wrong Item Number Entered Message

MISSING BID AMOUNT?

If a bid Amount is missed, the system will prompt for entry with a yellow warning icon.

Enter the Bid amount and press Enter to save.

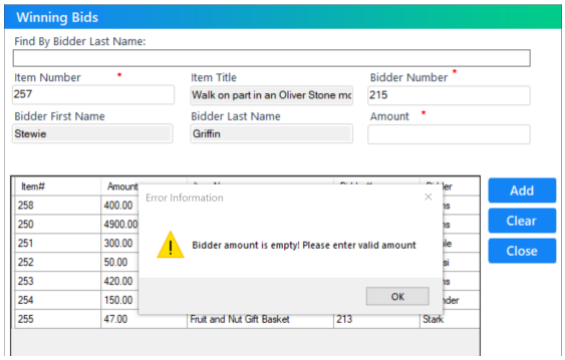


Figure 73 Missing Bid Message

ELECTRONIC WINNING BIDS DISPLAY

Figure 74 Export Winning Bids Menu

Use the File/Export Menu to select 'Winning Bids' to quickly create a file to transfer bid results to a display device.

An 'Import/Winning Bids' File menu selection allows the user to import winning bids from another source. This is a rarely used function and is for specific and unique situations.

17.3. Entering OTHER BIDS

Data entry for Other Bids purchases and donations such as raffle tickets and raise-a-paddle pledges can be done at any time during the event, is best done in batches, and should be done promptly to ensure all purchases and donations are in the system prior to invoice generation.

To enter **Other Bids**, go to the Other Bids window using the dashboard button or the navigation menu.

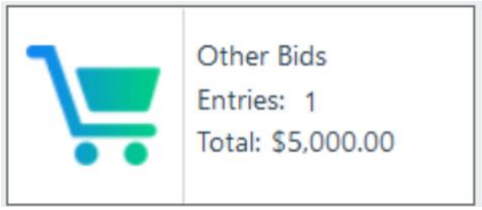


Figure 75 Other Bids Dashboard Button

Next, use the dropdown menu under **Receipt** to select the Other Bids Receipt type you are entering data for. The amount, if already specified in the **Receipt Tag**, will autofill. Otherwise, enter an amount in the Amount field. Enter the Bidder Number in the **Bidder Number** field and click the **Add** button. A record of the purchase/donation will be added to the bidder's invoice. Repeat for each additional entry, changing the Receipt Tag type when needed.

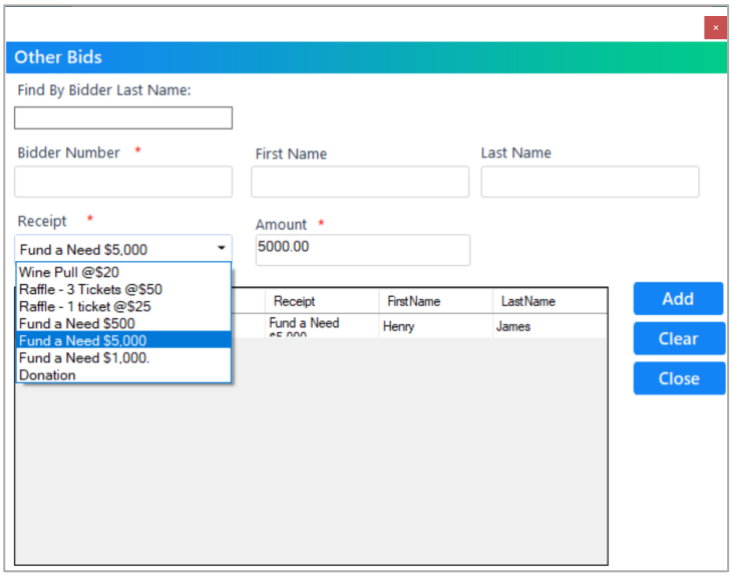


Figure 76 Receipt Tag Menu for Entering Other Bids

Option: In case you do not have a bidder's number, you can enter an **Other Bid** using a bidder's name. Use the search function and enter the first part of the bidder's last name and select the correct name from the resulting list.

To edit the Receipt Tag name or amount, tab to the field and make changes; enter to save in the Receipt Tag screen.

To edit an OTHER BIDS record (e.g. if you make a mistake)**,** click on the entry in the table; make changes in the top fields; click **Update**, or **Delete**, as required.

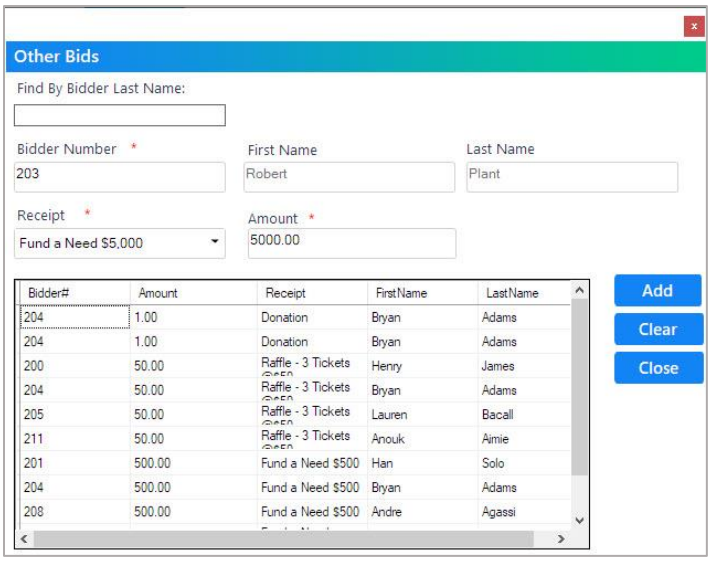


Figure 77 Other Bids Screen

Recommended: You may want to create standardized tally sheets to help with the recording of raffle tickets, fund-a-need pledges, and other purchases and donations. These should only contain moderate amounts of information and should be collected often for data entry to keep pace with sales. An example of a tally sheet is shown below. (You would create these outside the Bidstation program.) Record both the **type** of Receipt Tag (e.g. raffle ticket) and the **bidder number** for each purchase.

Raffle x1 - $10	Raffle X3 - $20	Raffle X10 - $50
500	125	
125	125	
125		
100		
100		

Glasses @$20	Wine Pull@ $30	Drink Ticket $10
		100

Figure 78 Tally Sheet Example

18. Payments and Using the Bidstation App

The description in this manual for payment procedures continues with the assumption that the Bidstation app has been installed on mobile devices to be used at the event, and that all setup actions for using the Bidstation app with Square have been completed (see Section 1 **Quick Start** or Section 3, **Setting Up the Bidstation App** above).

Summary:

Payments with Bidstation use Square. Bidstation tracks all winning bids, purchases and donations by bidder number. Square processes the payments when you are ready. Enable the mobile app to work by entering an Event Device Code on your mobile devices to sync them with the software on your PC. The Event Device Code is generated in the Setup window of the Bidstation software on your PC (see Section 3.3)**.** To avoid having long lineups at the end of your event, pre-register bidders' credit cards when they check in (**Saving Cards on File**). This is the best use of Bidstation since your guests will be able to skip lining up to pay at checkout. It also allows you to review and reconcile bids and purchases before you charge people's cards. This process is described below in Section 18.1 (**Checking in guests and Saving a Card on File**) and Section 18.2 (**Saving a Card on File: Step by Step Instructions**).

In some cases, you may want to process a payment right away (e.g. in the case of a large donation), or a guest may not wish to pre-swipe a credit card. In such cases you can **Check out** a guest with a credit card at the end of the event (see section 18.3, **Checkout with a Credit Card**). You can **Process Payment** for a balance owing at any time (described in Section 18.4) and **Cash, Check and Split Payments** can also be managed in the app (Section 18.5).

Add new guests to the Attendee list at any time or change details in an attendee's profile in the app as needed: Section 18.6, **Changing Attendee Details and Adding Attendees** describes these processes.

18.1. Checking in Guests and Saving a Card on File (ExpressPay)

Summary:

When you use Bidstation to register/check in guests and Save a Card on File, the payment card is saved in the Attendee profile until you elect to process the payment (individually or in a batch). Find the card icon beside the Attendee's name in the Attendee list to confirm they have a Card Saved on File . Process a payment any time by tapping '**Process Payment**' in the app or use the '**Process Square Payments**' processing button in the Payments screen in the Bidstation software program to process all payments in a batch after the event.

When guests arrive, tap **Check In Check out** and find the guest's name in the Attendee list. Tap their name to open their profile. From there you can add or update information and register their credit card by saving it on file (tapping **Save Card**). This way their winning bids can be processed after the event, or any time, without the need for lining up at checkout. If there is no balance owing, their credit card will not be charged. To add a new guest, tap +Bidder at the top of the Attendee list.

TO CHECK IN GUESTS AND SAVE A CARD ON FILE (USING EXPRESS-PAY) 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.

18.2. Saving a Card on File: Step by Step Instructions

The step-by-step instructions for CHECK-IN AND SAVING A CARD ON FILE are as follows:

1. Make sure you have completed setting up the Bidstation App. (See section 3).

2. Tap Check In Check Out

3. Locate name in list and tap. (Scroll, search or use letters on the right to jump to a name. You may review the phone and email details for accuracy with guest and make edits as necessary.)

4. Tap **Save Card** at the bottom of the screen.

5. **Swipe the card**.

6. Tap the **Next** button two times (filling in email address if not already entered).

7. Ask the guest for their billing ZIP, or present device to guest to input the ZIP themselves. If accepted, you will see a checkmark in a circle and the message '**Card and Customer Profile Saved'**. Tap **Done**.

8. If the Bidstation message confirms 'Card on file added successfully', then the process is complete. Tap **Okay**.

9. Tap the back arrow to return to the Attendee list.

18.3. Checkout with a Credit Card (no card saved on file)

Pre-registering credit cards at Check-in is not required but it is encouraged as it helps eliminate lines at Checkout and allows guests to enjoy a cashless event. However, if a guest prefers not to save a card on file at Check-in you can take payment at **Checkout**. Use the **Payment** option to swipe cards for guests who have a balance owing and who did not save a Card on File at Check-in. **Note**: The 'Payment' option will only be visible if a balance is owing.

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.

You will see a message saying 'Payment added successfully'. Tap the back arrow to return to the Attendee list.

The **Checkout** process is like the Check-in process in that the payment card is ***first*** saved in the attendee's profile without actually processing the payment. If you don't want to process the payment right away, use the back button after saving the Card on File to return to the list of attendees (and don't tap **Process Payment**). The card will be saved and you can process the payment later. If you want to process the payment right away, do tap **Process Payment**. The message 'Payment added successfully' will appear when the payment is processed.

18.4. Process Payment for Balance Owing

For many events, organizers choose to process payments after the event ends to allow time to review and reconcile winning bids and purchases. This is done in the Bidstation software, where you can process in a batch in the Payments window by clicking '**Process Square Payments**'. But there are times when silent auction organizers may want to process a payment while the cardholder is present, for instance in cases of very large amounts.

The Bidstation app lets you process the balance owing at any time for guests who have a Card Saved on File. Just tap **Check In Check Out**, tap the guest's name, tap **Make Payment**, and then tap **Process Payment.** The payment will be added successfully. The attendee's card will still be on file, and if a subsequent balance is owing it can still be processed after the event. (You can confirm if an attendee has a card on file by seeing if there is an icon beside their name in the attendee list , or by checking their profile, where a card icon will be visible. The balance owing is updated in the Attendee's profile and the Attendee list whenever the screen is changed or refreshed.)

Check In Check Out → Biff Hooper → (confirm details and bidder number) → Make Payment → Process Payment

18.5. Cash, Check and Split Payments

The Bidstation app lets you easily record cash or check payments for any guests who have a **Balance Owing**. Select the guest's name, tap Payment (or Make Payment if there is a Card Saved on File for the guest), select the payment type to record (Cash or Check), adjust the amount if desired, then tap 'Add Payment'. The payment will be added and the Balance owing will be adjusted accordingly.

Check In Check Out → Biff Hooper → (confirm details and bidder number) → Payment/Make Payment → Select Cash or Check → Add Payment

Split payments using different payment types can be recorded in the app by entering the amount to be paid and tapping **Add Payment** (or **Process Payment** in the case of a credit card). The balance owing will be reduced in the record and another payment can be added until it reaches 0.

18.6. Changing Attendee Details and Adding Attendees:

To add a guest who is not on the Attendee list tap +Bidder at the top of the Attendee list screen and fill in desired details. Required details are **First Name, Last Name** and **Bidder Number** (**Bid #** in app). Assign and enter a unique Bidder Number. **Email address** is required for swiping a credit card.

Save the new Attendee's details by tapping 'Save & Swipe' (or 'Save & Skip Swipe' if you are not saving their card).

You can change an attendee's details once they are in the system by making changes in the app fields and tapping **Update**.

Note: Bidder numbers should not be changed once the event starts as this could lead to errors. If you find you need to change a bidder number for some reason after it has been assigned this can be done, but you cannot assign a bidder number that is assigned to someone else. The software will allow you to change bidder numbers if necessary up until a Winning bid, Other bid or Payment has been entered, but not after.

18.7. Controlling Access

Control whether devices have access or not by using the **Stop/Start Sync** located in the Setup window of Bidstation on your PC. Stopping the sync will unpair devices and remove data from them. Starting the sync will allow devices with the code to have access to the data and use the app. Stop the sync after the event to stop the pairing.

18.8. Troubleshooting for the Bidstation App at the Event:

Declined payment – If a payment is declined, ask the guest for an alternate credit card. You will need to repeat the Card on File process to replace the existing card that was declined.

Prefer not to Save Card – If an attendee does not want to Check in with a Card on File, tap **Update** (for attendees already in the system), or if you are adding a new Attendee tap **Save & Skip Swipe.**

Accepting Cash or Checks – You can accept cash or check payments for all or part of a Balance Owing in both the app and the Bidstation software. In the app, tap **Payment** (or **Make Payment** if there is a Card Saved on File for the guest), select the payment type to record (Cash or Check), adjust the amount if desired, then tap 'Add Payment'. The payment will be added and the Balance Owing will be adjusted to reflect the remaining balance, if any. If a guest pays part of the balance with a credit card and part with cash or check, this can also be done by entering the payment amount for each payment type.

Split payments and using multiple cards – It is possible for a guest to make a partial payment on a balance owing using a credit card. Their card must first be **Saved on File**. Save the guest's credit card and then adjust the Payment Amount in the Payment Screen as needed before tapping **Process Payment**. The payment will be processed and the Balance Owing will be updated. The remainder can be paid with a different card or method. If you want to spread payments across multiple cards, tap **Replace Card** to save a new card on file and repeat this process for each card until the balance is paid.

ZIP not accepted – If a ZIP is not accepted, ask the guest to repeat and confirm to try again. ***Billing ZIP is required to Save a Card on File***. If unable to confirm ZIP, the guest will need to provide another

card or pay with cash or check due to Square Card on File requirements. The correct billing ZIP should always be entered to ensure processing will succeed.

'**Save Card**' does not appear at the bottom of the Attendee's profile – The card is already on file and a balance is owing. (You can still replace a card in the payment modal by tapping Make Payment and selecting Replace Card).

'**Make Payment**' does not appear at the bottom of the Attendee's profile' – There is no balance owing.

18.9. The Checkout Process:

At the close of the event, after notification or display of winning bidders, a checkout process ensures that guests who did not save a card on file make payment for any winning and/or other bids on their invoices. Guests who did not save a card can provide payment at checkout before picking up their auction items. Collect credit card, cash and/or check payments using the Bidstation app. (Cash and check payments can also be recorded in the Bidstation software program later in the **Payments** window.)

Successful bidders who saved a Card on File can go directly to picking up their items, and invoices if these were not distributed. Similarly, guests who made purchases or donations can leave without lining up if they saved a Card on File. (They may first want to collect their invoices if these were not distributed already.)

19. Processing Payments in a Batch After the Event

You can process payments after the event for all cards Saved on File in a batch using the **Process Square Payments** button in the **Payments** window of the Bidstation software. Open the Payments window from the dashboard icon or the navigation bar. The Process Square Payments button is featured prominently at the bottom of the screen.

Select the names of guests individually or as a batch and click **Authorize** to process payments for selected guests with Square.

You may want to review winning bids and purchases first by comparing your records to your bid sheets to check for accuracy before charging the credit cards. The final objective, subject to event reconciliation of all forms of payment and records of winning bids and other sales, is for the **Payments Total** (see dashboard button bottom left, refresh regularly) to match the **Grand Total** displayed on the dashboard (bottom right). If these do not match, check the **Payment Reports/Balance Owing** report (under 'Reports' from the dashboard button or the navigation menu) to ensure all guests have a zero-balance due.

Figure 79 Grand Total – Visible from Dashboard

Be sure to add any unrecorded cash or check payments before processing card payments in a batch, since when you tap **Process Square Payments,** the whole Balance Owing will be paid with the credit card on file for each guest.

20. F.A.Q.

Q: Can I search in Bidstation for an item or a donor?

Yes. In the ITEMS window (available from the dashboard), you will find the 'Search by title, number or donor' field in the top left corner.

Q: What does 0 mean in the Item number column?

If you have an item number 0 in the Item number column, it means the item has not been assigned a number. This can happen if you are entering Item numbers manually and forgot to enter one, if you imported Items without numbers, or if you imported duplicate numbers. You will therefore need to assign one.

Q: Where do I get a license key for Bidstation?

When you purchase Bidstation, use the free trial and a license key will be emailed to you. You will also have an account created for you on the website where you can retrieve it. Check your email for the license key and for the password for logging in to your account.

Q: Where do I get an Event Device Code to use the Bidstation App?

The Event Device Code is generated in the Bidstation software in the Setup window when the device sync is started.

Q: Can transaction totals be listed by category immediately following the auction?

Yes. Use the REPORTS function and choose [Item Report/By Category/Results].

Q: How many volunteers are needed to properly and efficiently input bids into Bidstation?

We recommend a minimum of two people, one to read the bids and BIDDER numbers, the other to enter the data.

Q: Can the donated ITEMS be listed by category and/or alphabetical sequence?

Yes. Use the REPORTS function and choose [Item Report/By Category]. This will allow you to view or print.

Q: Can this program be installed on more than one computer to accelerate processing for a large auction with multiple users entering winning bid and other bid data?

Yes. The program is ready for network sharing and only requires a simple file/folder sharing setup. However, it is not recommended, except in exceptional circumstances or for very large events, because networks are prone to disconnection at events and require specialized knowledge and equipment. If networks are used, it is highly recommended that they be created as wired networks, not wireless (Wi-Fi) to ensure network data speed and reliability.

Q: How do I notify winning bidders that they won an item?

We recommend printing invoices and distributing them before people leave. Bidstation's invoices clearly indicate which items were won as well as whether or not a balance is owing. You may also print a list of winning bids/purchases (under Reports/Bid Report) and post it for viewing. Emailing invoices is possible, but may not be reliable for notification purposes since some people may not bring phones or check them.

Q: Should invoices be printed as guests arrive at Checkout or pick up items?

No. This would undermine the effort to produce a speedy checkout. Print all invoices, possibly in multiple stacks prior to checkout so that cashiers only need to thumb through the stack to produce the invoice. (Complete each print run separately though so that one stack is ready before printing additional stacks.) Or, print by table number and deliver invoices to tables while guests are still seated. If the auction has a high number of invoices that only have Other Bid purchases and no auction items, consider printing only invoices with auction items first, as they are the most important ones for the checkout process.

Q: Is it possible to completely erase all of the database information if an incorrect button is pushed during the event?

No. Data is saved before the next record is opened. Only the current record would be lost. However, Bidstation does have a 'CleanUp' function under the file menu that will erase some or all of the data permanently, but will warn before doing so. Also, if the computer is damaged in some way, data may be lost. Users should always make a backup database file and make a habit of making regular backups after making changes such as entering all items, all attendees, all winning bids, etc.

Q: How much time is needed to input each Winning bid and Other bid?

We recommend testing this process with the actual people who will input the data to determine their individual speeds based on their keyboarding ability. Typically, bids take a few seconds each to enter.

Q: Is it difficult to add and subtract information at the last minute?

No. It is only necessary to be careful and precise.

Q: Can we import data from an Excel spreadsheet?

Yes, most users do. Detailed instructions are outlined in this manual. The Excel spreadsheet used for import must match the headers. CSV files can also be imported. To quickly and easily create a template for importing, use the function located in Bidstation under File/Import/Import Templates.

Q: Can I print customized bid sheets?

Yes, follow the instructions in the Create Documents section of the manual to make customizations and to create any type of custom document that you need, in addition to bid sheets (certificates, mailing labels, displays, etc.).

Q: Can I print customized thank-you letters to all donors?

Yes, see manual instructions to learn how to create your own thank-you letters.

Q: How do you prepare separate invoices for group or syndicate bids?

The easiest way to handle this kind of case is to ask your bidders if they can work it out so that only one of them pays for the item. Otherwise, make a list of all the bidders in the group and divide the total bid by the number of bidders. From here, you can create copies of the item won by the group so that each member can have their share of the winning bid entered against each duplicate copy of the item. Split pay is also possible from within the app for payments that are processed at the moment by entering the portions to be charged one at a time. See the section on **Cash, Check and Split Payments** above for additional details.

Q: Can I export data from Bidstation into Excel format?

Yes. Items, Attendees, Winning Bids, Other Bids and Payments can easily be exported as Excel files or CSV files.

Q: Can I export winning bid data so that I can create displays such as with PowerPoint or other similar methods?

Yes. Simply export winning bids and the data will be in Excel format ready for formatting in PowerPoint or other similar systems for displaying winning bid information.

Q What are Merge Document Filters?

Merge document filters are optional filters that may be selected when creating documents such as bid sheets using templates in Bidstation. For users who want to create custom bid sheets for a specific group, category, section of an auction or range of item numbers, these filters can be selected from the **Merge Document Filters** screen offered when you open **Create Documents.**

Q What happens if I stop the sync?

Stopping the sync unpairs devices so they cannot access data and use the Bidstation app. The sync can be stopped and started at any time from the Setup screen.

Q What does the message 'Not configured yet' in the Square Account panel mean?

Your Square account was not connected with Bidstation or the display has not been updated. Click **Refresh Status** to update the display.

Q Why can't I import items and attendees?

You probably need to stop the sync in the Bidstation software. Bidstation will not let you import new items or attendees while the sync is running because this could cause errors during the event. Stop and start the sync any time by clicking the **Stop/Start Sync** button in the Setup window.

Q Can I use Bidstation after the event to collect outstanding payments?

Yes. If you need to collect payments for any reason (e.g. someone leaves without paying), contact the guest and you can enter their card details in the app and process payment right away.

Q How do I refresh the app screen to show the latest updates?

The app refreshes automatically every time you change from screen to screen. You can also refresh the Attendee list manually by swiping down anywhere in the white area.

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