



User Manual

Bidstation™ Version 4.0.0+
February 1, 2026

Additional support, how-to guides, videos and other resources can be found on our website at www.auctionzoom.com/bidstation-resources.

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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.

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Introduction

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 via bid sheets. There may also be a live auction, paddle raise, raffle ticket sales, wine pull, or other fundraising activities at the event.

As the event organizer, you organize track of all of this. Bidstation software maps onto the flow of the event and each of the auction elements to make your job easier.

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

- Adding live and silent auction items into Bidstation and assigning them a unique item number.
- Adding all attendees into the software program and assigning them a unique bidder number (pre-assigned or during check-in).
- Preparing bid sheets for each silent auction item.
- Checking in Attendees at the auction and saving payment cards on file.
- Entering winning bids, purchases and donations in the software and preparing final invoices.
- Collecting payment from any guests checkout (for those with no card on file or who are paying with cash or cheque).
- Processing payments and confirming there are no balances owing (individually in-app or by batch in desktop).

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

Initial Planning Considerations

Before adding Items and Attendees to Bidstation or preparing documents, some decisions you will need to consider 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.). Categories typically are used when publishing a catalogue using Bidstation document creation tools.

How will you enter items and attendees?

One at a time data entry in Bidstation, or import from CSV or Excel (recommended)? Will the custom fields be used for event-specific reporting or data lookup? (Typically not.)

What documents and forms are needed for the auction and guests?

Will the Bidstation document templates be used? Will you be creating tally sheets to record purchases and raise-a-paddle donations?

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? Emailing invoices to attendees?

How will you distribute invoices?

By print or email, or both?

Before or after payments are reconciled and processed?

Quick Start: Key Setup Steps for your Auction

Set up your account and add event information

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

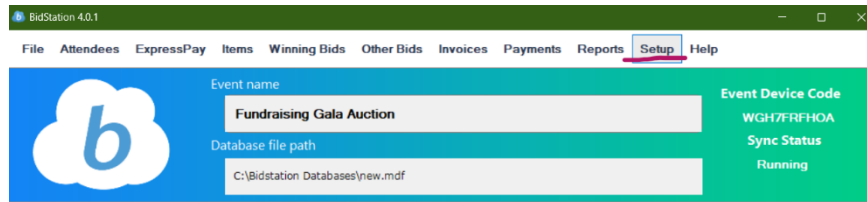


Figure 1 Open Setup from menu

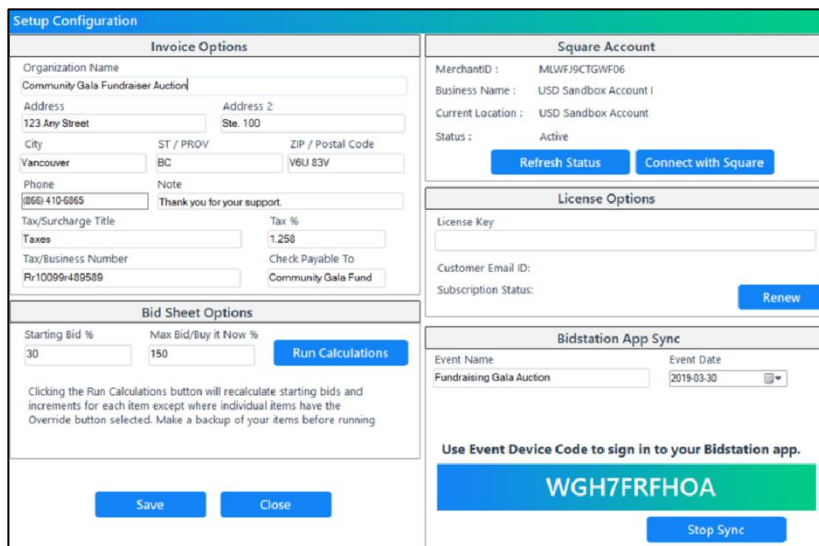


Figure 2 Setup Window

Input details about your organization (top left) and event (bottom right). Include information that you want to appear on invoices.

Setup Configuration		
Invoice Options		
Organization Name Community Gala Fundraiser Auction		
Address 123 Any Street		Address 2 Ste. 100
City Vancouver	ST / PROV BC	ZIP / Postal Code V6U 83V
Phone (866) 410-6865	Note Thank you for your support.	
Tax/Surcharge Title Taxes	Tax % 1.258	
Tax/Business Number Rr10099r489589	Check Payable To Community Gala Fund	

Figure 1 Invoice Information, setup

Prior to starting the App Sync, Update Event Name and Date. Event Name will appear in the Bidstation app when it is connected. Device code will be blank until Square account is connected and Sync Started. See 3.4 Controlling access – Start/Stop Event Device Sync, for details on syncing.

Bidstation App Sync	
Event Name Fundraising Gala Auction	Event Date 3/30/2019
Use Event Device Code to sign in to your Bidstation app.	
BFEAKGX13E	
Change Device Code	Start Sync
Close	

Figure 2 Event Name and Date for app sync

Register Bidstation

Register Bidstation with the license key emailed to you under File/Register (if you have purchased a Bidstation License). The License Key registration window will open. Paste your valid license key in the window and click Validate to unlock the Free Trial version to Full version.

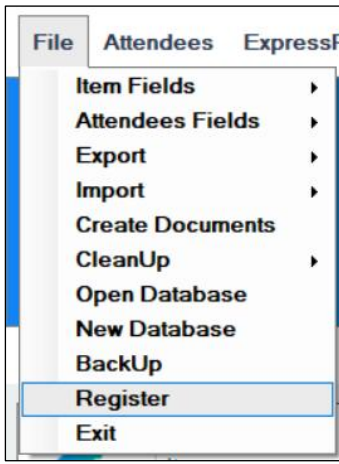


Figure 5 Open License Registration

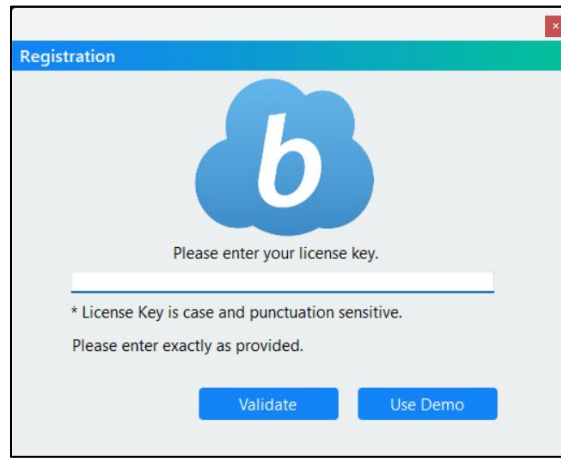


Figure 6 License Key Registration window

Set up payments – Connect with your Square account

Before credit cards can be saved on file or payments processed, you will need to connect Bidstation with Square. Square accounts do not need to be connected if you are not working with credit cards, such as when preparing for the event and working with items and attendees. You can wait to connect Square and do so when you are ready to start working with credit cards and connecting Square card reader hardware to the app.

To connect with Square, open Setup, click **Connect with Square**. A web browser window will open and ask you to sign in to your Square account. Follow the prompts and approve the connection. This will authorize Bidstation to use the Square account. This must be done for each database that is created.

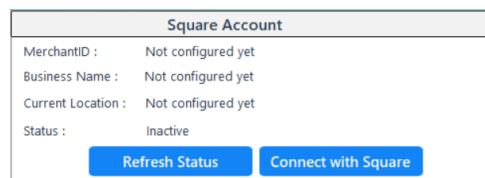


Figure 3 Square Account Panel

When you save cards on file, Square creates a customer record and a card token and hands back the token to Bidstation to save with the attendee record. Credit card numbers will not be visible at any time. Once recorded, the card token is linked to bidder number and can be used to pay for all purchases.

Note that you must use the main Square account log in username and password.

Connect with the 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 connected. You will now be ready to use the Bidstation app at your event. Use the same Event Device Code in the Bidstation app on devices you are using at your event.

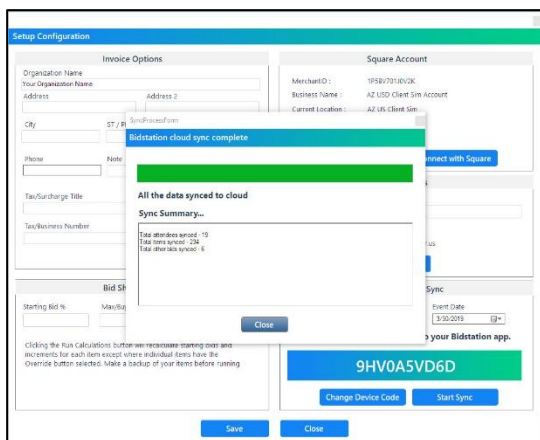


Figure 5 Event Device Sync

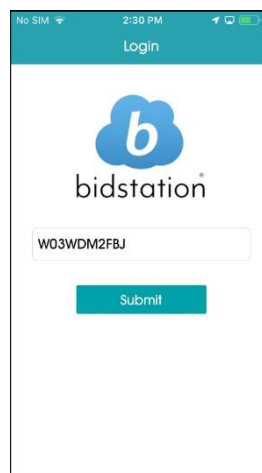


Figure 4 Connect App

Set up database

Bidstation comes with a sample database that will open by default when the program is first launched after installing. Before you begin to work on your event and begin to add items and attendees, you will need to first 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. This will create a new database without any saved data and ready for setup, connecting with Square, adding items and attendees, creating documents, and all other auction functions.

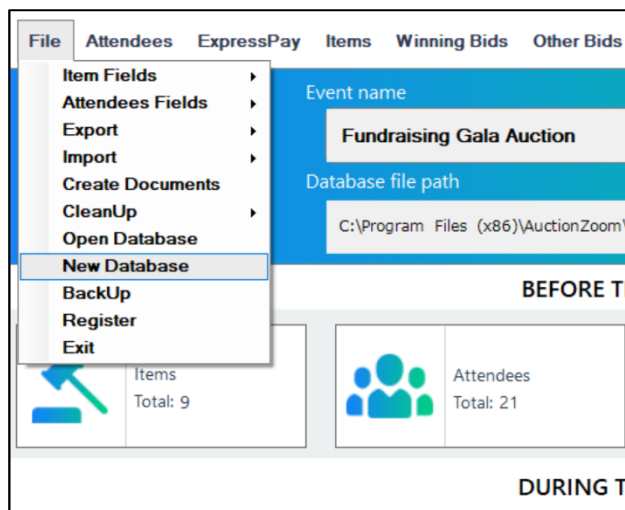


Figure 6 New Database Selection Menu

Create Live and Silent Auction items

Auction items are what bidders bid on and only have one winner per item. Each item must have an item type assigned to it. Enter auction items according to the Type (silent, live or basket).

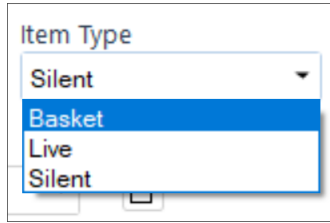


Figure 7 Item Type Drop-down Menu in Item Screen

There are several functions in Bidstation that use the Item Type to help you run the event.

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

Enter item details

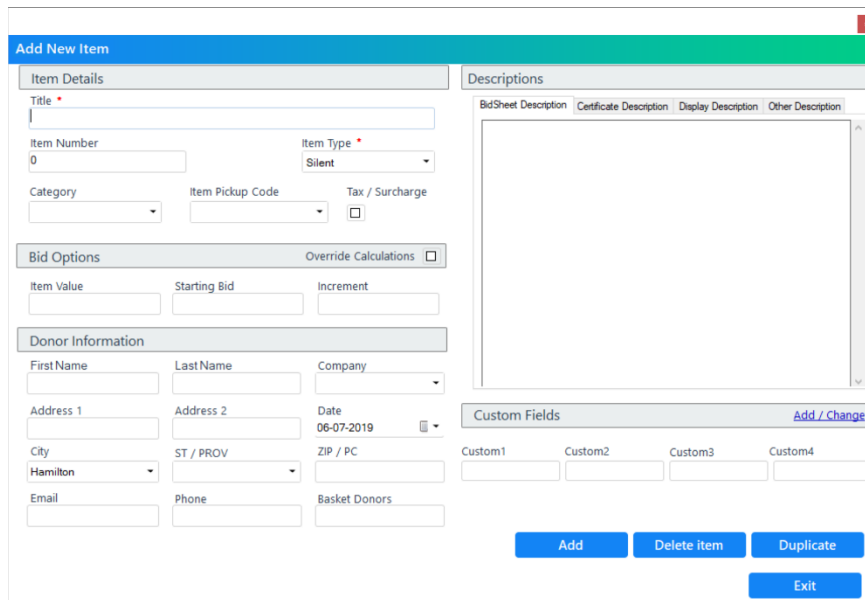


Figure 8 Add New Item in Items Screen

Define each item's item number, title, type 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. Item numbers can be left empty initially, but you'll need to add them before creating bid sheets or recording bids. Import all your items from Excel or add a new item by clicking Add New. **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.

Bidder#	Amount	Receipt	FirstName	LastName
200	5000.00	Fund a Need \$5,000	Henry	James
201	5000.00	Fund a Need \$5,000	Han	Solo
211	5000.00	Fund a Need \$5,000	Anouk	Aimie
205	5000.00	Fund a Need \$5,000	Ben	Afleck
201	25.00	Raffle - 1 ticket @\$25	Han	Solo
202	25.00	Raffle - 1 ticket @\$25	Calvin	Hobbs

Figure 9 Other Bids Entry Screen

The Other Bids screen uses Receipt Tags, which are prepared in advance, determining categories and amounts for fast recording of Other Bids. The bidder number alone can be entered in the field to record a purchase/donation for the Receipt Tag selected in the drop down. Receipt Tags are created prior to the event using the Receipt Tags function located on the Dashboard.

Receipt Tag Name	Amount	
Donation	0	<input type="checkbox"/>
Fund a Need \$1,000	1000.00	<input type="checkbox"/>
Fund a Need \$5,000	5000.00	<input type="checkbox"/>
Fund a Need \$500	500.00	<input type="checkbox"/>
Raffle - 1 ticket @\$25	25.00	<input checked="" type="checkbox"/>
Raffle - 3 Tickets @\$50	50.00	<input type="checkbox"/>
Wine Pull @\$20	20.00	<input type="checkbox"/>

Figure 10 Create Receipt Tag Screen

You’ve completed the Quick Start section.

What Is Bidstation?

Bidstation™ is auction management platform for running an efficient traditional auction fundraising event. It includes a mobile app, integrated with Square, for simple attendee card on file registration and no checkout lines. The Bidstation software is used on your PC to plan, prepare and run the auction smoothly and efficiently. The Bidstation app is used to check in guests, save cards on file and collect payments at your event using your Android or iOS devices and Square Stands, connected to Square card reader hardware.

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 that will facilitate smooth running benefit auction events.

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.

FTER 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.

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 tokenized and saved at check-in. The platform links 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 of long lineups at the checkout. It allows for secure and accurate, automatic payment processing with no lineup for guests who pre-swiped a card. 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.

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.

Installing Bidstation

Download and install Bidstation software on a Windows computer to be used at your auction event. Register it (under File menu) with the license key emailed to you, or proceed without a key to work with the Free Trial version. If you don't authorize Square to use Bidstation at this stage, it can be done later from the Setup window. See Section:, 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.

Typically the first thing you do after creating a new database is fill in the Setup screen (in the navigation menu). Do this now, (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.

The file you will download will be the installation file and may be in a compressed zip format. Download it and save it to a location on your computer such as the desktop. Extract the installer file and 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.

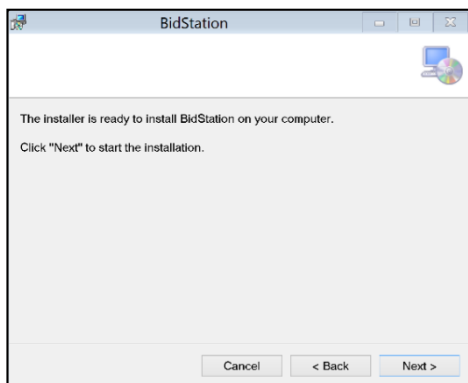


Figure 12 Install Bidstation

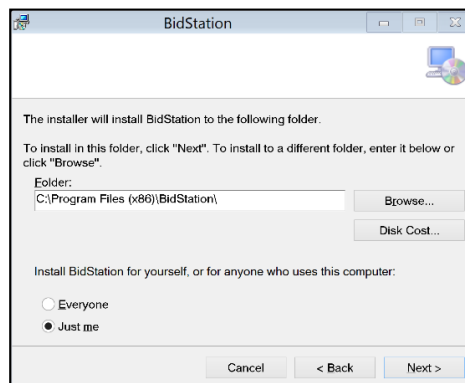


Figure 11 Installation Path

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

- Bidstation application
- SAP Crystal Reports (creates reports)
- SQL LocalDB Server

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.

License Key Registration

When Bidstation is first installed, it is not registered and is in Free Trial mode. This means that it will be restricted to up to 20 items and 20 attendees, but all features are enabled for testing and

trial purposes. Purchase a license key to unlock the full version without limitations on attendee and item records.

After installing the software, use File/Register to enter the license key provided.

Follow the prompts to unlock the full version.

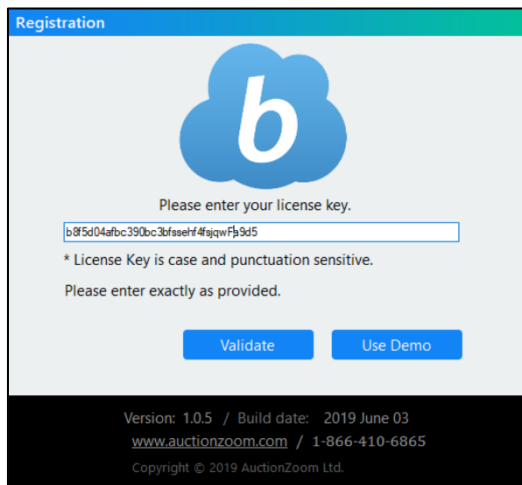


Figure 13 Enter License Key Field

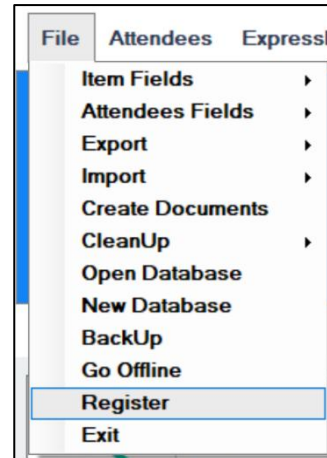


Figure 14 Register Bidstation

Bidstation will open with a sample database (Filename: Sample.mdf) 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').

Setting Up the Bidstation App

The Bidstation app is used to manage check-in and payments at your event. To register and check in guests at the event, use the Bidstation app on mobile devices.

- Get the app and install it on the mobile devices you will use.
- Connect with Square in Bidstation to authorize Bidstation to work with your Square account. It is recommended that you do this authorization prior to 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.

- Sync the devices with the Event Device Code.
- Test the app with a test attendee check in and configure Square hardware being used with each device.

Download and Install App

Download the app (Bidstation) from the App store or Play store. 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 and be sure to test them prior to the event.

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. Open Setup in Bidstation. Click Connect with Square to step through authorizing your Square account to connect with Bidstation. 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 correct 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.

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 start the sync and 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 on your mobile device(s). The app will display an input field for the Event Device Code. Enter the code and tap Submit, verify the event name is correct and tap yes.

Controlling access – Start/Stop Event Device Sync

You can control whether devices have access by using the Start/Stop 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 if you don't need to connect with the app.

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 will see a popup displaying the cloud sync upload connection progress.

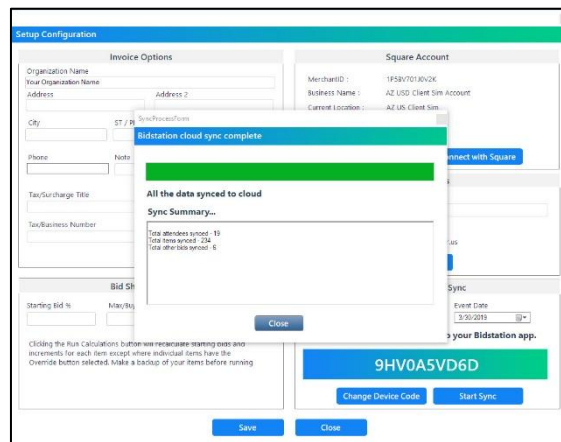


Figure 15 Start Sync

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. You may right click the code to copy it for emailing to devices. The code is not case sensitive.

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.

Bidstation Setup and Database Instructions

Setup Window

To provide information about the auction event, click on SETUP on the menu bar to see the 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 be able to calculate the starting bid value.
- Event’s auction name will not appear in the dashboard.

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.

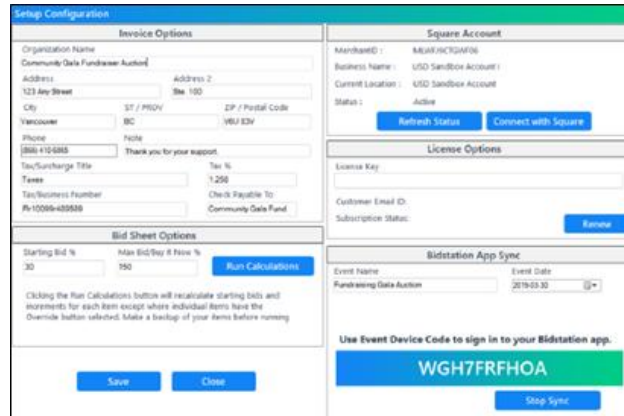


Figure 16 Setup Window

SETUP FIELD	DESCRIPTION/PURPOSE
ORGANIZATION NAME	Insert the organization name to display it on invoices and other documents.
ADDRESS	Enter full address details in Address, 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 or perhaps Thank you for your Support.
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: 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., 30%) 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.

Bidstation Setup: Database File Format

At Bidstation's™ core is a Microsoft SQL database file that stores the information.

This single SQL 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.
- Backup database; the backup file is a small duplicate copy of the database that is easily stored.

Sample Database: Bidstation™ installs with a sample database (Sample.mdf) and required Setup information. This sample data can be used for training purposes. When ready to start your auction event, create a new blank database.

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. **We highly recommend selecting a location that is not being synced with a cloud storage system such as OneDrive, Google Drive, Dropbox, etc., as they can interfere with the normal operation of the SQL database.**

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.

Using Bidstation on a Network

Networking is not required. 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 is not recommended as the rapid entry features and other Bidstation functions make it unnecessary, even for very large events. Networks are prone to problems and disconnection at events and require specialized knowledge and equipment to set up.

Menu Commands and View Windows

Navigation Menu

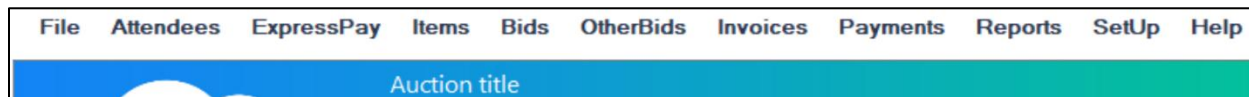


Figure 17 Navigation Menu

Use the top menu bar, pictured above, 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.

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.

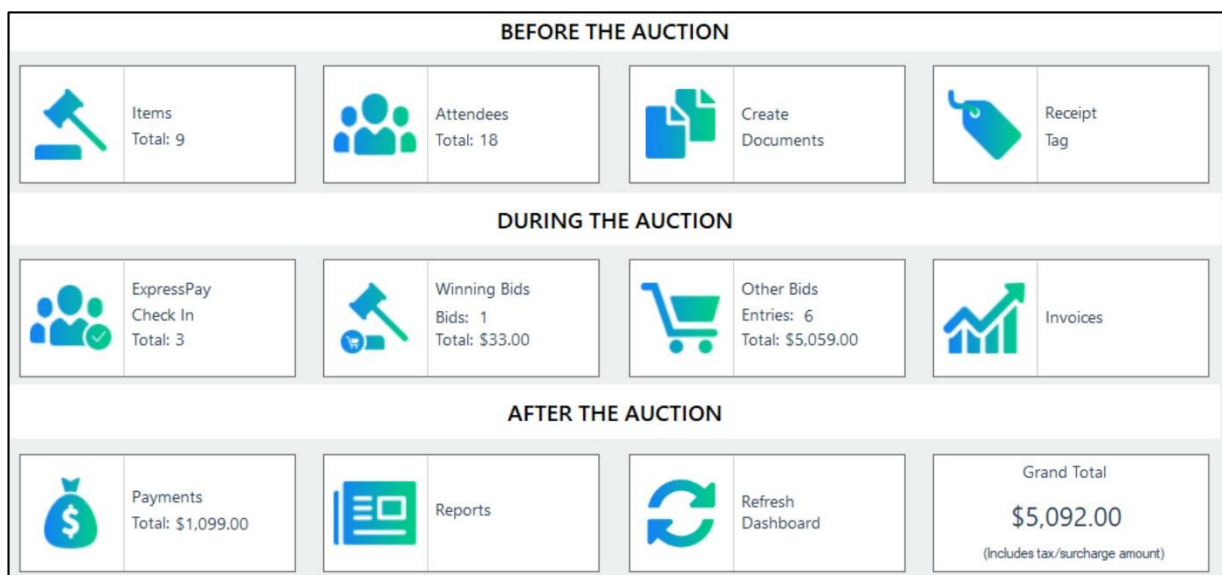


Figure 18 Dashboard buttons

Menu Commands

The table below provides detail on the functions available from the Navigation Menu. See section :Administrative Functions, for further description of 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, type, 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/ 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	Manually record cash and check payments as well as credit card payments that may have been processed outside of Bidstation (card on file payments are automatically recorded). Process payments for Cards Saved on File.
REPORTS	Generate reports 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, End User License Agreement (EULA), Access Support.

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.
- 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.

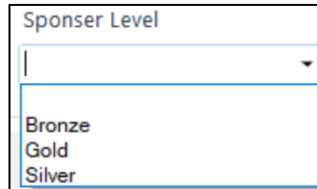
A screenshot of a web form field titled "Sponsor Level". The field is a drop-down menu with a downward-pointing arrow on the right. The menu is open, showing three options: "Bronze", "Gold", and "Silver".

Figure 20 Sponsor Level Field Option

- Alternatively, they may be added, edited and removed via the file menu ITEM fields and ATTENDEES fields.

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.

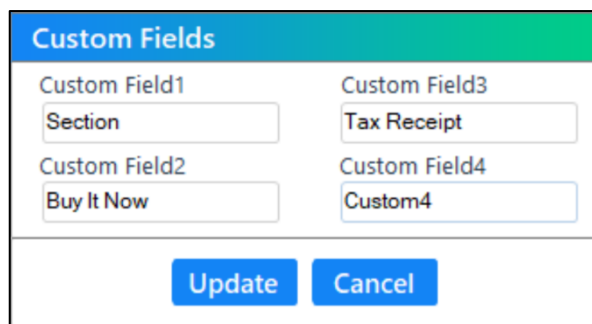
A screenshot of a "Custom Fields" editing window. The window has a blue header with the text "Custom Fields". Below the header, there are four input fields arranged in a 2x2 grid. The top-left field is labeled "Custom Field1" and contains the text "Section". The top-right field is labeled "Custom Field3" and contains the text "Tax Receipt". The bottom-left field is labeled "Custom Field2" and contains the text "Buy It Now". The bottom-right field is labeled "Custom Field4" and contains the text "Custom4". At the bottom of the window, there are two blue buttons: "Update" and "Cancel".

Figure 21 Custom Fields – Editing View

For example, custom fields could include a Constituent ID from the donor database, to track menu preferences, or include a value to merge into documents such as Table Host. Custom fields are for advanced users and are typically not used for most events but are available if needed.

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

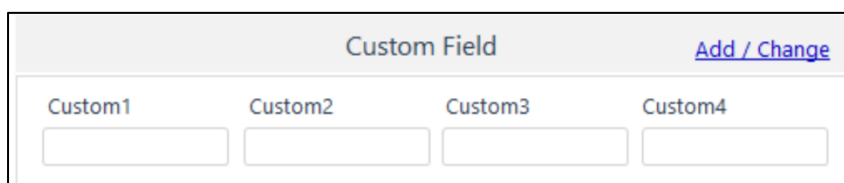
A screenshot of a "Custom Fields" data entry window. The window has a grey header with the text "Custom Field" and a blue link "Add / Change" on the right. Below the header, there are four empty input fields arranged in a row, labeled "Custom1", "Custom2", "Custom3", and "Custom4".

Figure 22 Custom Fields – Data Entry View

Note: Bidstation export/import templates retain generic column header data labels for custom fields (e.g., Item1 or Attendee1).

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. 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.

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:

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 or Excel. Exporting is useful for tasks such as document creation, event analysis, and managing historical records. Use the File Menu to Export data by selecting Export, selecting the type of data you want to export, and clicking Save. Note that exported files often contain headers from the database that may not be applicable if re-importing. Review and delete columns that are not required.

FILE/Import Data

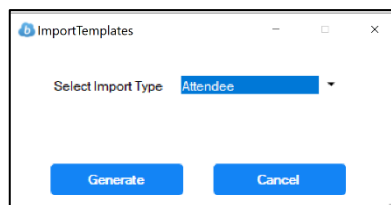


Figure 23 Import Selections

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 versus manual input.

Import Format Conventions: The import file format conventions must be closely followed 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 if not needed, except for the required headers in each type of import. User-defined fields can be renamed after the import is complete.

1	Title	Catalogue/Value	DonorFirst	DonorLast	Category	Type	Company	Address1	Address2	City	Phone	State	Zip	BidSheetD	Certificate	DisplayDesc	OtherDesc	HSurcharg	Item1	Item2	Item3	Item4	Sta
2																							
3																							
4																							
5																							

Figure 24 Headers in Excel Items Template

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: Importing Data Into Bidstation for full details and instructions that should be followed.

FILE/Create Documents

This option enables the user to create a variety of auction documents based on event information in the database.

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:

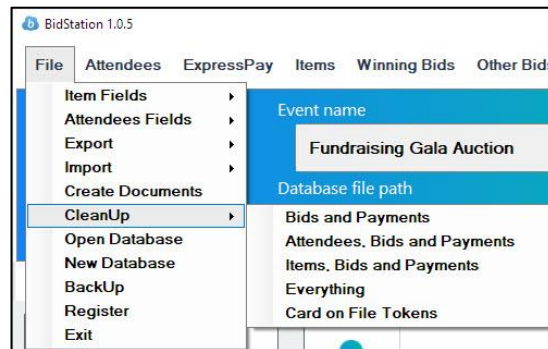


Figure 25 Clean Up – Permanently Deletes Data

Choose from the menu to selectively and permanently remove data.

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 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 review a past event 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.

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, 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 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.

Importing, Entering and Exporting Data

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

- Importing data into Bidstation (section 7.1)
- Bidstation database field requirements and optional fields for information related to ITEMS (section 7.2).
- Bidstation database field requirements and optional fields for information related to ATTENDEES (section 7.3)
- Generating Import Templates to upload data, if desired (section 7.4).
- Conventions to be followed for importing Attendees data (section 7.5)
- Conventions to be followed for importing Items data (section 7.6)
- 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 (top row). The header names must not be renamed for the import and export functions to work properly, although you may delete header columns if you don't require using them.

Importing Data into Bidstation

Data can be keyed in or imported into Bidstation from Excel or CSV files. Templates may be generated for each data type under the navigation menu Import/Import Templates. 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 will be processed and imported into Bidstation. If any errors are found, a window will be displayed where they can be reviewed and saved to allow for correction of these record errors and re-importing of them.

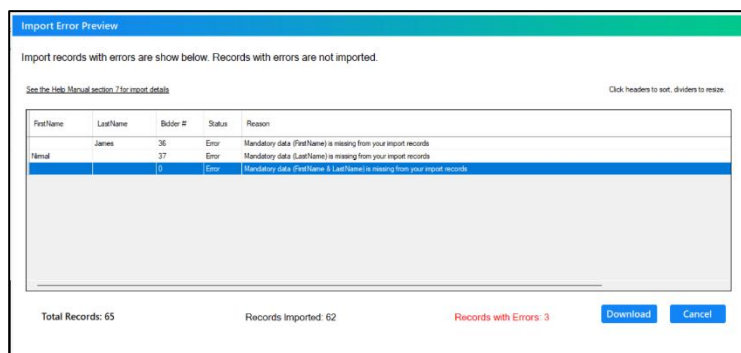


Figure 26 Import Error Preview window

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

Note that import sources (Excel, CSV) should not contain text formatting or special characters. Formatting will be ignored and special characters such as an “é” or an em dash may be converted into a symbol that can be later updated in Bidstation.

Database Fields: ITEMS

See the table below for descriptions of the labels used to record item information. At the time of importing or adding Items, only the Title and Type are required. All other fields are optional. However, the other information is useful for organizing into baskets or categories, for thanking donors (donor and contact details), producing informative bid sheets (descriptions, values) etc. Item numbers must be added before the system will accept Winning Bids, Other Bids and create bid sheets.

*Required fields

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.) These numbers are not required at the time of importing items but are required when producing bid sheets and recording winning and other bids.
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 using the basket function in Bidstation™.
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 creation of bid sheets. Up to 5000 characters.
CERTIFICATE DESCRIPTION	Enables text description for creation of certificates. Up to 5000 characters.
DISPLAY DESCRIPTION	Enables narrative and text for creation of displays. Up to 5000 characters.
OTHER DESCRIPTION	Enables text description for any other type of document you may need. Up to 5000 characters.

IFSURCHARGE	Shows percentage of tax/surcharge if required. Must be toggled on for every Item that requires a surcharge.
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. You may add custom codes for each item or import custom codes as well.
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.
-------	---------------------------------

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, unless you are going to assign numbers to attendees during check-in, using the app to record each bidder number assigned.

*Required fields

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.
PARTNERFIRST NAME	Record if Attendee’s companion is registered under the same bidder number. Also useful for correspondence, signage, etc.
PARTNERLAST NAME	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:

	<p>If using characters, test table titles to ensure the list sorts as intended:</p> <ul style="list-style-type: none"> • 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	<p>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.)</p> <p>Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed.</p> <p>Fields are included in exports for use in all documents.</p> <p>Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.</p>
ATTENDEE2 Note: do not change header names in import file	<p>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.)</p> <p>Select 'Add/Change' to label custom fields in Attendee Profile for reference as needed.</p> <p>Fields are included in exports for use in all documents.</p> <p>Custom Item fields can be used as a special filter to allow the user to search a particular field or range or both.</p>

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 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.
EMAIL	For ATTENDEE. Required if sending receipts and Invoices by email.
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.

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 functions. 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, Import, 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, column headers may be deleted. (E.g., 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.

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.

*Required fields

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 (BIDDER NUMBER)	Required to run the auction and to save an Attendee’s credit card on file. Created by either: <ul style="list-style-type: none"> • Entering numbers only • Using the Generate Bidder Numbers tool in Bidstation after importing ATTENDEES. (The ‘Generate Bidder Numbers’ button can be found in the Attendees window.) <p>Note: Use of characters other than numbers not allowed.</p>
TABLERNUMBER	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 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.)

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.

*Required fields

HEADER	ITEMS – Import Template Header Conventions
*TITLE	Required: ITEMS data will not be imported without Title values.
*CATALOGUE NUMBER (imports to ITEM NUMBER)	<p>Although it refers to the Item number, leave as labelled ('CatalogueNumber').</p> <p>Use numbers only (not alpha text).</p> <p>May be left blank for importing but item numbers are required to run the auction.</p> <p>CATALOGUE NUMBERS (referring to the Item numbers that organizers assign to items in the auction) are either:</p> <p>Assigned by the user in the import process or generated by Bidstation after items have been imported.</p>
*TYPE	Required when importing Items data. Only three options may be used: "Silent", "Live" or "Basket".
VALUE	Dollar value of item. Use numbers only. Do not use currency symbols such as "\$".
DESCRIPTION FIELDS	<p>There are four description fields available for use. Follow all conventions when entering data in them.</p> <ul style="list-style-type: none"> • 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. <p>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.</p>
IFSURCHARGE	<p>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.</p> <p>Use Excel column if a tax/surcharge is relevant for each ITEM.</p> <p>If you are not applying a tax/surcharge, leave blank or enter the numeral 0 (zero).</p> <p>To import ITEMS and apply the tax/surcharge, enter the numeral 1 (one) in the excel column.</p>

	<p>When entering ITEMS data manually, check and or uncheck the 'Tax/Surcharge' box in each Item profile as relevant. (The default is unchecked.)</p> <p>Surcharge status can be edited in the ITEMS window at any time (check/uncheck).</p>
STARTINGBID	<p>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:</p> <ol style="list-style-type: none"> 1. 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.) 2. Enter a starting bid for each item individually. Starting bids can be imported from Excel (in the StartingBid column) or they can be entered manually in each item's profile.

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. Use the File Menu to Export data by selecting Export, choose the data type from the list and Save the data file. Export of data in Reports is also possible in Bidstation but this is done from the individual reports (section 15.2).

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.

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), and a unique Item Number. To key in item details, click on Items on the top navigation menu or the dashboard.

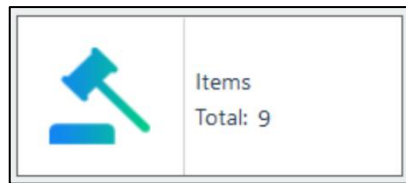


Figure 28 Items Button on Dashboard

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

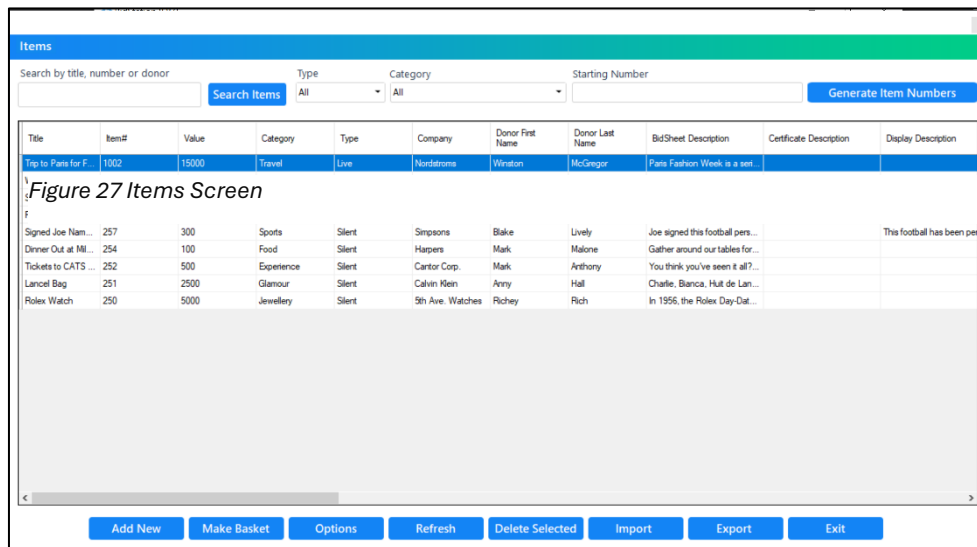


Figure 27 Items Screen

Data can be entered directly via 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.

Required vs. Optional Fields for Items Data

Title, Item Number (referred to as CatalogueNumber in the database) and Type (Basket, Live or Silent) fields are required to hold an auction. (NOTE: when importing item records into Bidstation, only Title and Type are required for the import to work, allowing for automatic Generation of Item Numbers in the Bidstation program.

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.

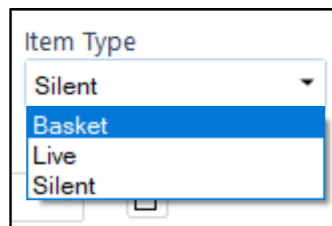


Figure 29 Item Type Drop-down Menu

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: Import Data.)

Items Functions

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 may 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.

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.

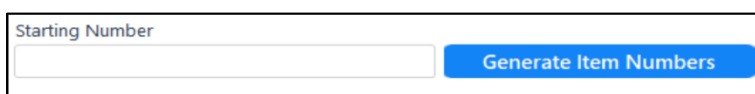


Figure 30 Generate Item Numbers Button

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.

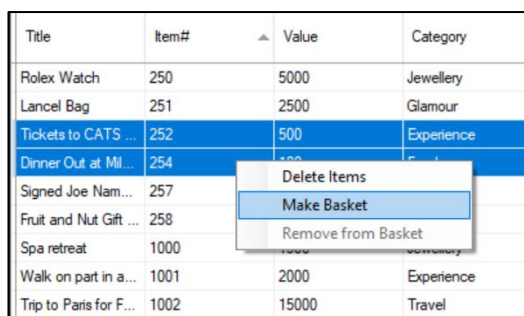
Note: Item numbers should be finalized before creating documents such as bid sheets.

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 item records with duplicate item numbers.

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.



Title	Item#	Value	Category
Rolex Watch	250	5000	Jewellery
Lancel Bag	251	2500	Glamour
Tickets to CATS ...	252	500	Experience
Dinner Out at Mi...	254
Signed Joe Nam...	257
Fruit and Nut Gift ...	258
Spa retreat	1000
Walk on part in a...	1001	2000	Experience
Trip to Paris for F...	1002	15000	Travel

Figure 31 Making a Basket by Selecting Items

To create a basket:

- Open 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.
- Right-click on one of the items in the group selected to bring up a menu of options. From the 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 edit descriptions after the basket is created if required.

Note: Once added to a basket, the item record will be greyed out in the table. 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.

Entering ATTENDEES Data

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 32 Attendees Button

An Attendees list will open.

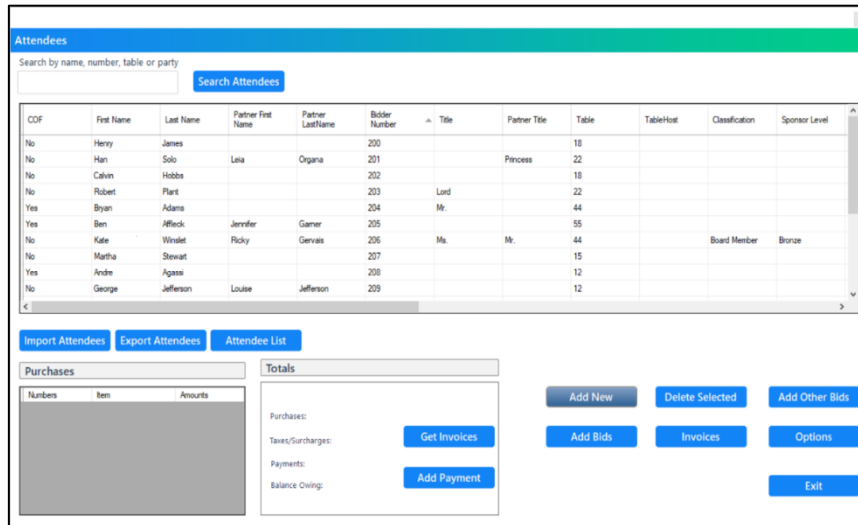


Figure 33 Attendees Screen

Click the Add New button.

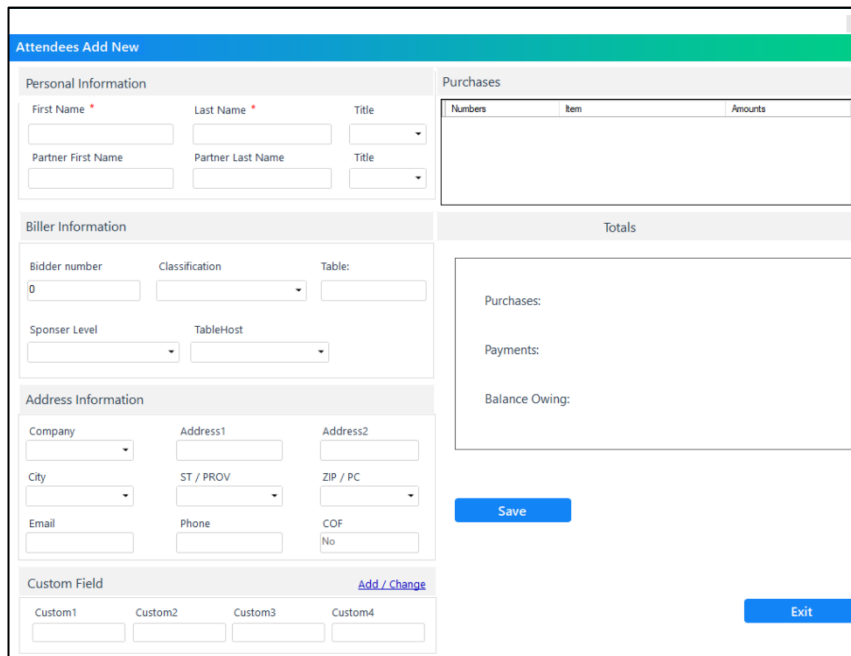


Figure 34 Blank Attendee Profile

Enter details in the fields including, minimally, First Name, Last Name. Bidder number is required to run the auction, but it can be added later or at check-in as guests register. Email address is required only if sending receipts and invoices by email

Import ATTENDEES

To import an Attendee list from an Excel or CSV file, use the Bidstation Import Template. Include the required fields (First Name, Last Name), as well as any other details needed.

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. Import with bidder number or use “Generate Bidder Numbers” function in the Attendees window to automatically assign bidder numbers. Bidder numbers cannot be changed once a Winning Bid, Other Bid or Payment has been entered in Bidstation. Bid numbers may also be added or changed via the App when checking guests in.

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.
- Classification – e.g. board member, staff
- Sponsor Level
- Table Number
- Table Host
- Address
- Email address – required sending bidder receipts and invoices by email.

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

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.

Generating ATTENDEE Bidder Numbers

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

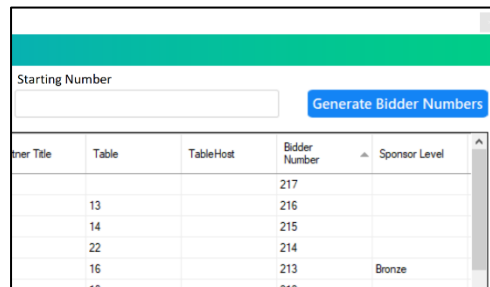


Figure 35 Generate Bidder Numbers Tool

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.

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.

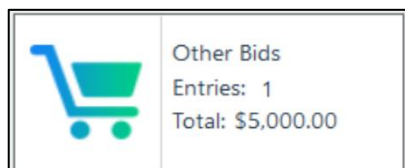


Figure 37 Other Bids Dashboard Button

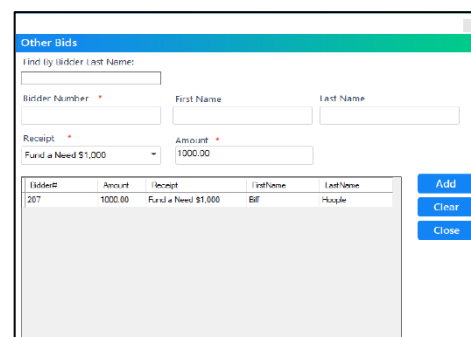


Figure 36 Other Bids Screen

Other Bids do not have item numbers as they are not auction items and can have multiple “winners” i.e., buyers. They need to be keyed into Bidstation before they will appear on invoices and included in balances owing.

To prepare for data entry of Other Bids at the event, it is necessary 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.

Creating 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.

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.

Receipt Tag Name	Amount	
Donation	0	<input type="checkbox"/>
Fund a Need \$1,000	1000.00	<input type="checkbox"/>
Fund a Need \$5,000	5000.00	<input type="checkbox"/>
Fund a Need \$500	500.00	<input type="checkbox"/>
Raffle - 1 ticket @\$25	25.00	<input checked="" type="checkbox"/>
Raffle - 3 Tickets @\$50	50.00	<input type="checkbox"/>
Wine Pull @\$20	20.00	<input type="checkbox"/>

Figure 38 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.)

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: Entering OTHER BIDS at the Event, for more details and for OTHER BIDS data entry instructions.

Planning for Payments

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 may 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 after attendee winning bids and other bids are added. 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 and/or checks 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.

Saving Cards on File at Check-in (ExpressPay)

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.

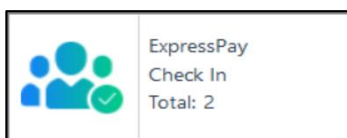


Figure 39 ExpressPay Report Button

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 to pay.

Bidder #	Table #	FullName	Balance
204	44	Adams, Bryan	0.00
215	14	Griffin, Stevie	0.00
207	15	Hoople, Biff	0.00
Total Express Attendees: 3		Grand Total:	0.00

Figure 40 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: Payments and Using the Bidstation App.

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.

Checklist

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

- Registered Bidstation with a purchased license key.
- Add Setup Details and connect Square with Bidstation.

- Entered Items.
- Entered Attendees.
- Prepared Receipt Tags for Other Bids (to enable rapid entry of Other Bids at the auction).
- Created any baskets that are planned, built from individual auction items.
- 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).
- Downloaded the Bidstation app to be used at the Event (available at the App Store and Play Store).
- Sync Bidstation with the app to enable the software and the app to work together.
- 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, especially with 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.

Preparing AUCTION DOCUMENTS

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 display certificates.

These documents are prepared using information about items and attendees stored in Bidstation. Below you will find descriptions for:

- 14.2) Exporting data from Bidstation to be used for document preparation in other programs
- 14.3) Bidstation's available document templates (which can be easily customized)
- 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.

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.

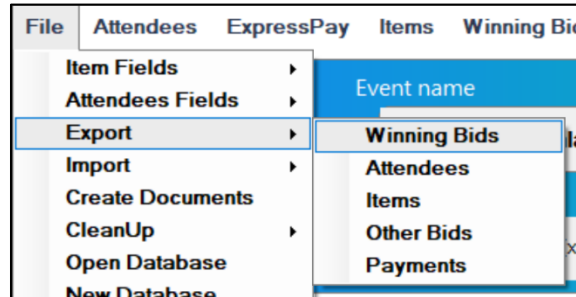


Figure 41 Export Items Selection Path

Included Document Templates

Bidstation is equipped with many sample templates of typical auction documents to create final documents populated with specific event information. The word document files are stored in the program folder (C:\Program Files (x86)\AuctionZoom\Bidstation-Square\MergeDocuments) and

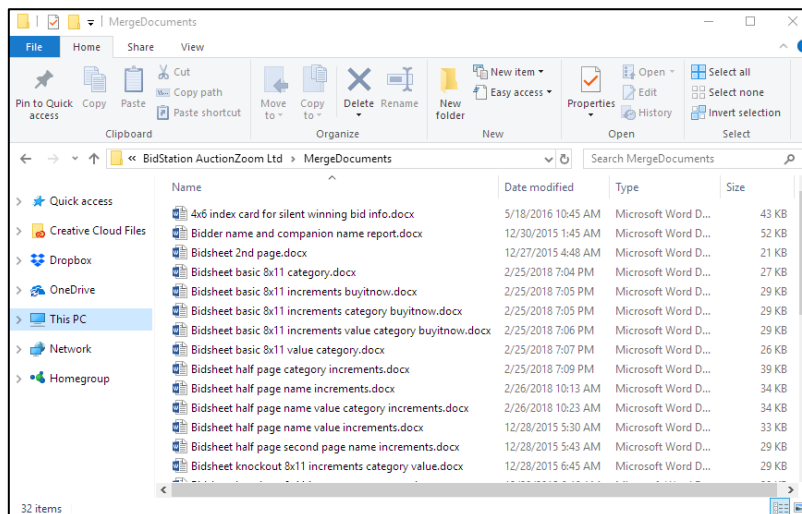


Figure 42 Sample Templates List

are accessed through Bidstation's Create Documents function. Templates are meant to be modified 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. When you first create a bid sheet document, it will appear without customization. Customize it as needed, adjusting layout, logo, colour, etc., and when you proceed to merge, the design and formatting will apply to all your bid sheets. We

recommend saving your modified templates to a convenient location on your computer for future re-use, and to preserve the default template.

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 43 Sample Bidsheet with pre-printed increments

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 44 Sample Bidsheet with Buy It Now

In addition, there are several bid sheet template formats to select from:

- standard (8.5 x11) with 18 increments
- half size
- bid sheets with or without value displayed, etc.

You can 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:

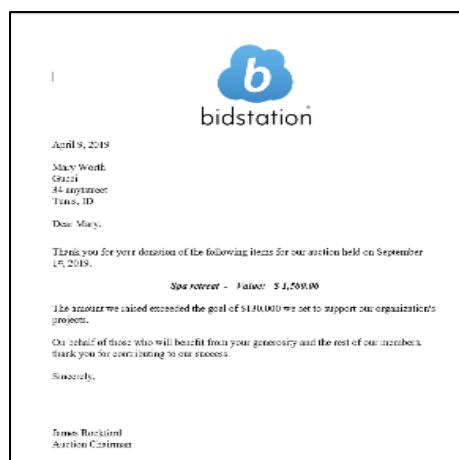


Figure 45 Thank-you Letter Template

Customize thank you letters to for needs of the event by updating the paragraph text, changing the logo and modifying the closing as required, then save your updated template under a new file name and location of your choice.

Award Certificate Template:

If services are donated to the auction event without a certificate, it is straightforward to create a certificate document for display using the template to merge data from the Items' records:

- Item #
- Item Title
- Description
- Donor
- Contact Phone#

You may add or remove merge fields as part of the modification you wish to perform, such as fonts, images, colours, etc.



Figure 46 Sample Certificate

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:

- Open Create Documents from the dashboard icon or select Create Documents in the File Menu.

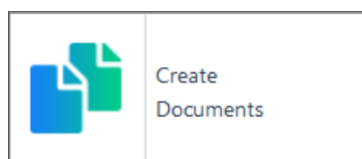


Figure 47 Create Documents Button

- A screen will open offering a number of Word merge filters (See section below for more details on selecting filters.) to segment auction data, if needed, and select a subset of items to make bid sheets for (according to item type, category, description or custom fields). Leave filters un-selected to include all records in the merge.
- Click Ok.

- Select the document template you would like to create from the list presented (e.g. basic bid sheets, bidder paddle cards, display, etc.).

The template will open in Word and will typically be in merge field display mode.

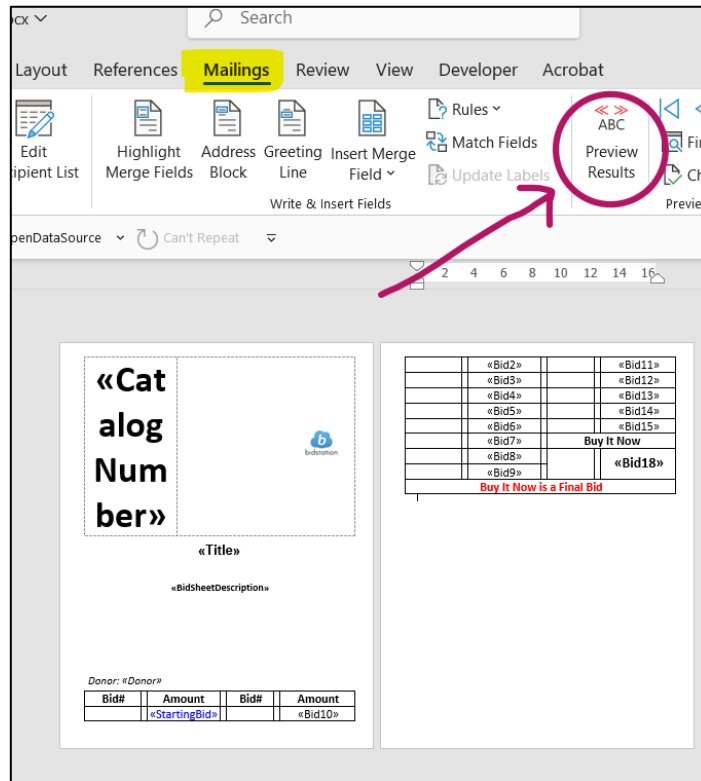


Figure 48 Word template merge field display mode

To preview layout, select the 'Mailings' tab, then 'Preview Results' from the options displayed at the top of the screen in Word.

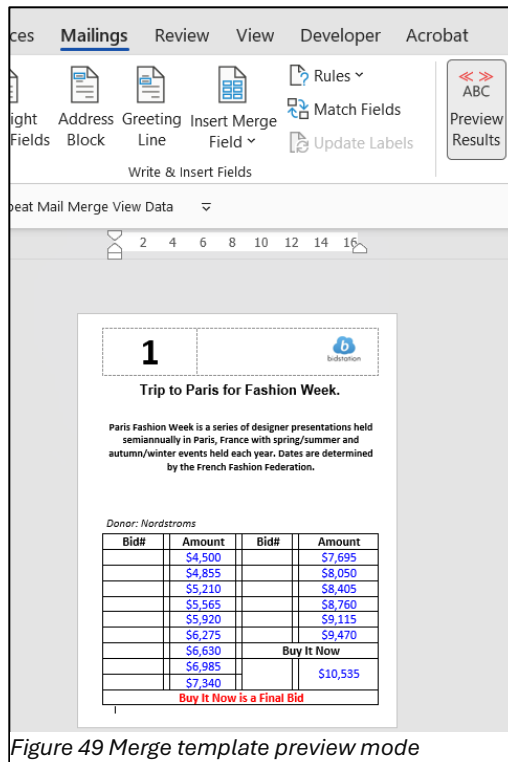


Figure 49 Merge template preview mode

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 into one document that can be printed for your auction. Review each page here before printing to ensure layout is okay based on content merged.

At this point, you will have two Word documents open. One is the merge template, where the merge fields are and where modifications were made prior to merging. The second is the final merged documents window. Save your modified merge document template for re-use, giving it a new name and desired location. Naming the template with the word 'bidder' in the filename will indicate to Bidstation that the template is for attendee record merges, and will result in Attendee records being used for merge fields. Do not include "bidders" in the filename for templates using Items record data. (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.

Using Merge Document Filters to Segment Documents in Groups

Merge Document Filters are used to filter records that will be used for merges according to type, category, description, or by other groupings identified in custom fields.

Using optional Merge Filters to segment data:

Click Create Documents . 'Merge Document Filters' will appear.

In this screen, you can make selections of the filters to apply.

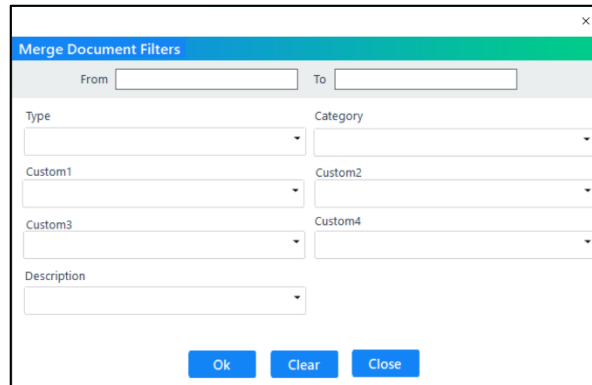


Figure 50 Merge Documents Filters

If are closing the auction in timed 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 filter the set of documents you are creating to just one group at a time for easier printing document management. For example, if creating certificates and no filters are selected, the merge file made will produce certificates for all items, leaving you to sort through for the ones needed. By inputting certificate descriptions in the certificate descriptions field in the item record, you may then use the Description field here to select Certificate Descriptions filter and the merge will only create documents for items with data in the certificate description field. Filters can make the document handling process more efficient, but is not required to make documents.

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 unselected when the 'Merge Document Filters' screen opens and click 'OK'.

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

We recommend becoming familiar with Word mail merge functions in a document if you are new to the process. Since Bidstation makes it easy to generate documents, it is safe to practice with your data or the sample data to gain experience and comfort with the process, ahead of printing deadlines.

Preparing REPORTS

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.



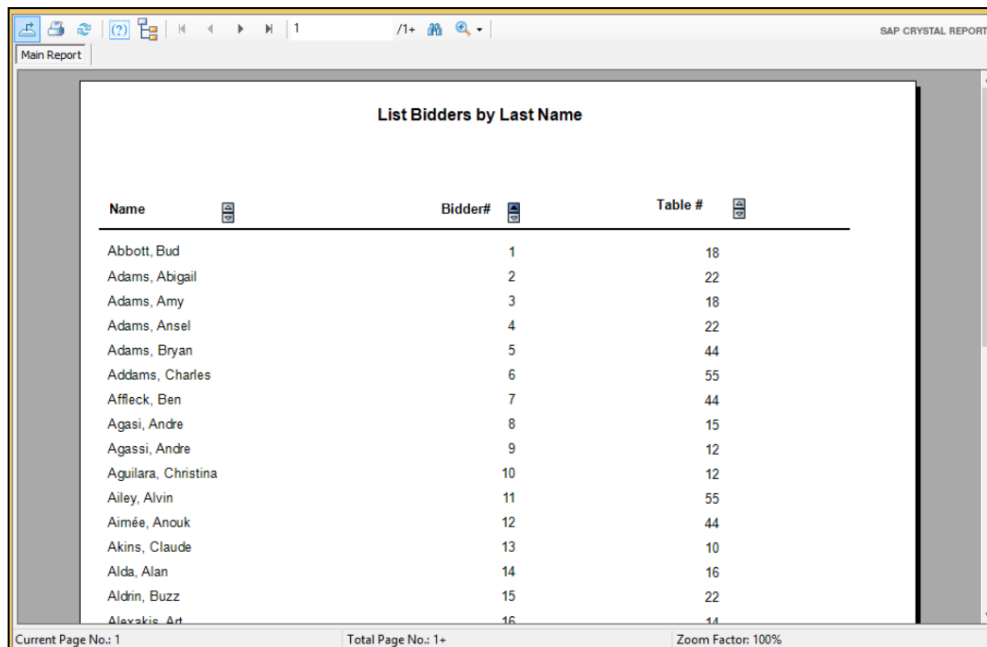
Figure 51 Reports Button

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.



The screenshot shows a SAP Crystal Reports window titled 'Main Report' with the report content 'List Bidders by Last Name'. The table has three columns: Name, Bidder#, and Table #. The data is as follows:

Name	Bidder#	Table #
Abbott, Bud	1	18
Adams, Abigail	2	22
Adams, Amy	3	18
Adams, Ansel	4	22
Adams, Bryan	5	44
Addams, Charles	6	55
Affleck, Ben	7	44
Agasi, Andre	8	15
Agassi, Andre	9	12
Aguilara, Christina	10	12
Ailey, Alvin	11	55
Aimée, Anouk	12	44
Akins, Claude	13	10
Alda, Alan	14	16
Aldrin, Buzz	15	22
Alavakis, Art	16	14

At the bottom of the window, it shows 'Current Page No.: 1', 'Total Page No.: 1+', and 'Zoom Factor: 100%'.

Figure 52 Attendee Report

Printing and Exporting Reports

Sorting Columns: Sorting columns is available in most report layouts using the sort buttons to the right of each header (small up/down arrows).

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

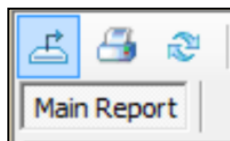


Figure 53 Export Report Selected in Crystal Reports

Descriptions of different kinds of reports:

ATTENDEE Reports



Figure 54 Attendee Reports Menu

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

All ATTENDEE reports include 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.

ITEM Reports



Figure 55 Item Report Menu

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

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

Title	Category	Experience	Catalog Number	Bidder Number	Value	Results
Tickets to CATS on Ice			25	210	\$ 500.00	\$ 200.00
Category Total					\$ 500.00	\$ 200.00
Dinner Out Gift Card	Food		28	215	\$ 100.00	\$ 500.00
Category Total					\$ 100.00	\$ 500.00
Rolex Watch	Jewellery		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
Trip to London	Travel		100	216	\$ 15,000.00	\$ 1,000.00
Category Total					\$ 15,000.00	\$ 1,000.00
Total					\$ 32,600.00	\$ 3,175.00

Figure 56 Item Report Examples

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.

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.

Attendee Report	Dashboard
Item Report	
Basket Report	
Bid Report	Purchases by Item Number
Payment Report	Purchases by Last Name
	Purchases by Bidder Number
	Tax/Surcharge Report
	Other Bids Report
	Bidder Summary Report
	Auction Summary Report
	Sales By Category Summary
	Sales by Type Summary
	Items without Bids

Figure 57 Bid/Purchase Report Menu

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

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.

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

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.

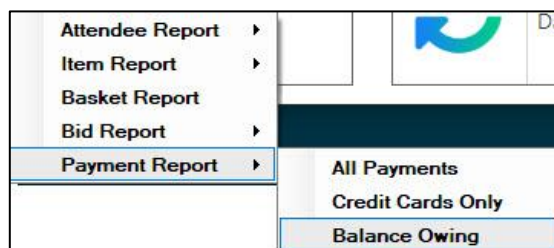


Figure 58 Payments Reports Menu

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.

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.

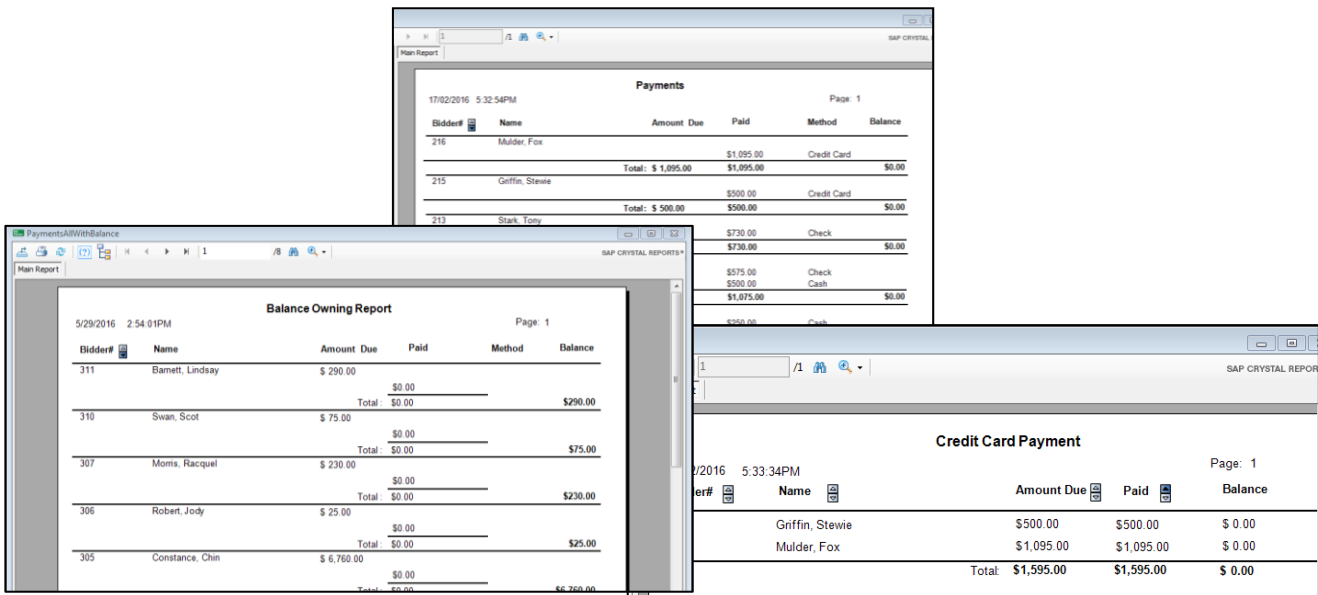


Figure 59 Payment Report Examples

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.

Refresh Dashboard Button:

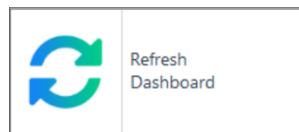


Figure 60

Bidstation communicates in real-time with the app but you may manually trigger a refresh to sync and update all data within the software, app and cloud.

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).

Preparing and Sending INVOICES

Types of Invoices

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

Card Saved on File:

- Credit card is saved on file for future payment processing.
- Invoice heading marked 'Card on File – Go Directly to Pickup' (in red).
- Successful bidder can go directly to item pickup area, or leave if no auction items won.

Card on File - Go Directly to Pickup		Bid ID :	#19
Mr. Adams Bryan		Table :	44
			ExpressPay
Code	Item #	Title	Value Price
	0	Raffle - 3 Tickets @550	\$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 61 Invoice – Card on File Displays in Heading

Card NOT Saved on File:

- No card payment saved .
- No ‘Card on File’ (COF) status in invoice heading.
- Attendees with balance owing visit 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 by type (e.g., by table number, by bidder number, etc.) that is most useful for your purposes.

Common reasons to create invoices include:

- Primary reason: For Distribution – to identify items won and which guests won them.
- For Guest Departure – to identify pre-swiped guests distinctly from those who need to provide payment at checkout.
- For Archiving – to print/store invoices as final event documents of record.

Creating Invoices

Select Invoices from the navigation menu or use the Invoices dashboard button. Select an invoice display/print option from the following choices:

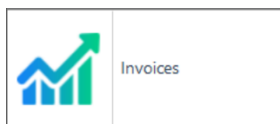


Figure 62 Invoices Button

FORMAT OF INVOICE SERIES	PRINT RESULTS
BY BIDDER NUMBER	Generates 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: this must be set up and tested prior to the event. See Section: Emailing Invoices.)

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

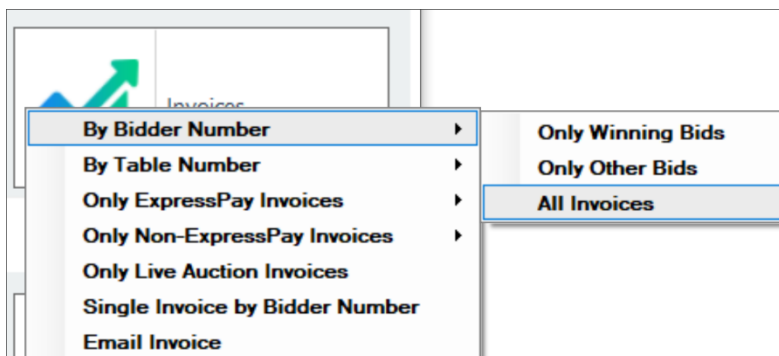


Figure 63 Invoices Menu

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.)

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 to attendees at tables 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.

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 64 Bottom Row of Dashboard – Payments Total and Grand Total Display

If the Grand Total is higher than Payments Total, there are likely attendees with balances owing and payments outstanding. Consult the Balance Owing report for follow-up with for payments. 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.

Processing Card Payment Refunds

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

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.

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.

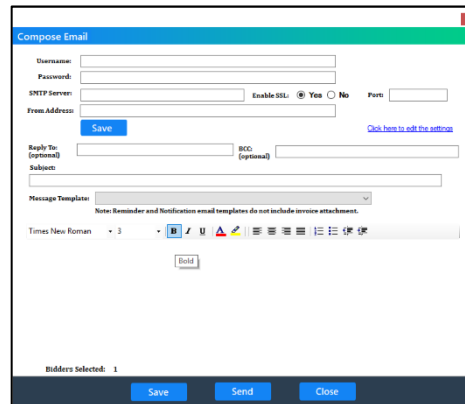


Figure 66 Email Invoice Window

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.

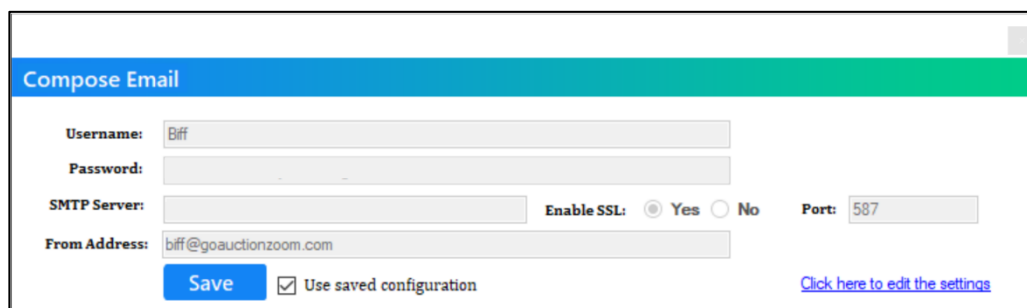


Figure 65 Email Invoice Settings

Email Sending Details

Sending invoices via email requires some careful and informed 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 security and sending limits that could fall below event requirements. Ensure that you check with your provider. If you need a transactional

email server credential to allow for larger volumes or you are not able to use your own SMTP server, you can send a request to AuctionZoom’s support team for assistance.

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

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 are displayed, 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, select ‘Click here to edit the settings’.
- Test the settings by sending an 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 Attendee profile for testing, 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 attached to the message.

Sending invoices via email to guests

Once the sending function testing has confirmed it is operational, as outlined in the previous section, you are ready to email invoices to attendees. Invoices must not include greater than 30

The screenshot shows the 'Compose Email' window. At the top, there's a blue header with 'Compose Email'. Below it are several input fields: 'Username' with 'biff', 'Password', 'SMTP Server', 'From Address' with 'biff@goauctionzoom.com', 'Reply To (optional)' with 'biff@auctionzoom.com', and 'BCC (optional)' with 'nancy@auctionzoom.com'. There are also checkboxes for 'Enable SSL' (Yes/No) and 'Port' (587). A 'Save' button is next to the 'From Address' field. Below these is a 'Message Template' dropdown set to 'Invoice email'. The email body is a rich text editor with a toolbar and contains the following text: 'Dear \$Bidder\$, Please find the attached Invoice from BidStation. Sample text. Thank you for attending the gala. We appreciate your support.' At the bottom, there's a 'Bidders Selected: 1' indicator and three buttons: 'Save', 'Send', and 'Close'.

Figure 67 Email Template

purchased items (winning bids or other bid records). If a single invoice has more than 30 items, save and send it separately as a pdf.

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

- Ensure the Bidstation computer has access to the Internet.
- Click Invoice dashboard button; select ‘Email Invoice’ option.
- Select the Bidders who are to be sent Invoices.
- 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’.
- 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. The invoice email will not send a message to an attendee that does not have an invoice (no bids or purchases). Reminder email and Auction Notification email – These are 2 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	<p>A default placeholder template message will be displayed. Modify this message to be sent to attendees.</p> <p>Before sending, there is an option to save the changes for repeated use.</p> <p>To personalize a message with the attendee's first name on each email, include this merge tag: \$Bidder\$</p> <p>I.e., Dear \$Bidder\$, will merge the first name after Dear.</p> <p>The Attendee's name will appear in the invoice anywhere you use this merge tag.</p>

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.

Entering Bids at the Event

Entering Bids (The Clerking Process)

During the event, Winning Bids for silent and live 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. Which 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 checkout opens.

- 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.
- 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, enter to save the record.

Entering WINNING BIDS

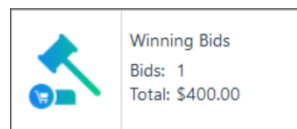


Figure 68 Winning Bids button

Note: This task is for silent and live Auction Items only and is done immediately after auction sections close and live auction winning bids are received.

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 entering a winning bid for an Attendee/bidder, the amount is automatically added to the Attendee’s invoice.

Winning Bids

Find By Bidder Last Name:

Item Number * Item Title Bidder Number *

Bidder First Name Bidder Last Name Amount *

Item#	Amount	Item Name	Bidder#	Bidder
258	400.00	Trip to Paris for Fashion Week.	204	Adams
250	4900.00	Rolex Watch	204	Adams
251	300.00	Lancel Bag	207	Hoople
252	50.00	Tickets to CATS on Ice	208	Agassi
253	420.00	Signed Joe Namath football	204	Adams
254	150.00	Dinner Out at Milestone's	210	Salander
255	47.00	Fruit and Nut Gift Basket	213	Stark
257	1200.00	Walk on part in an Oliver Stone ...	215	Griffin

Figure 69 Winning Bids Entry Screen

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, pressing the Tab button on the keyboard to move from field to field and the Enter button after the winning bid amount is keyed in:

- Item Number. [Tab]

- Bidder Number. [Tab]
- Winning bid amount. [Enter]

Press Enter to save a winning bid.

Data Entry Tips:

- If needed, enter partial last name in the search field to select a 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: used to remove a record.
- Sort: Click headers to rearrange columns for viewing.
- Columns: Click to reorganize by dragging the header.
- Enter data efficiently using the Tab key to move between fields and Enter to save.

NEW AUCTION ITEM?

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

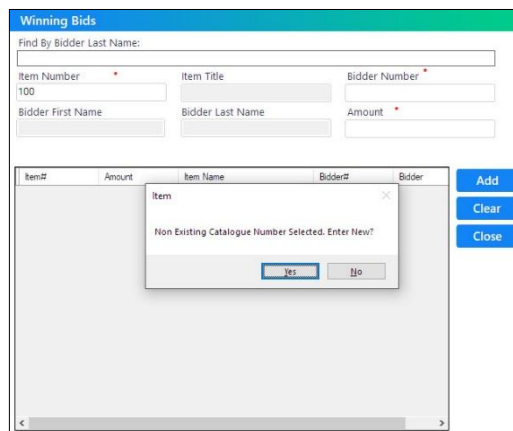


Figure 70 Wrong Item Number Entered Message

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.

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.

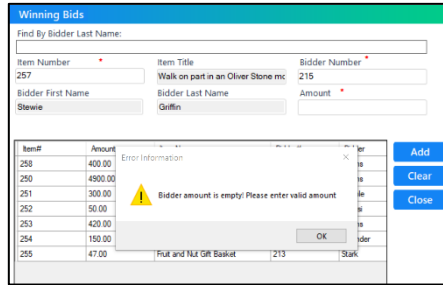


Figure 71 Missing Bid Message

ELECTRONIC WINNING BIDS DISPLAY

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



Figure 72 Export Winning Bids Menu

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.

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 73 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 entry, changing the Receipt Tag type when needed.

Option: In you do not have a bidder’s number available, you use the Find field to look it up by the name. Use the search function and enter the first part of the bidder’s last name and select the name from the resulting list.

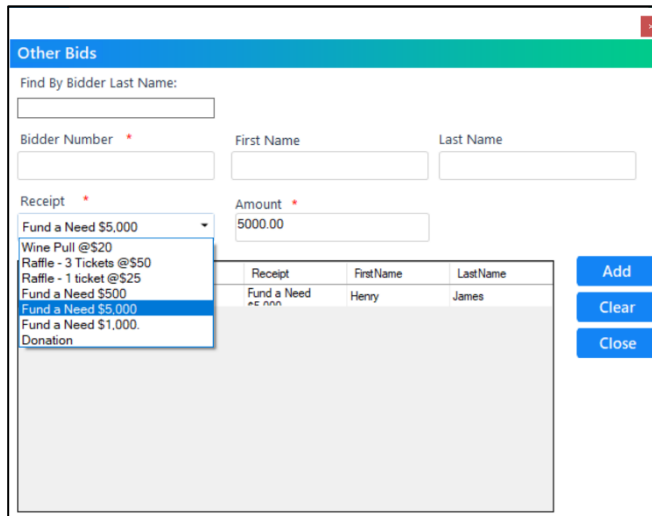


Figure 74 Receipt Tag Menu for Entering Other Bids

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.

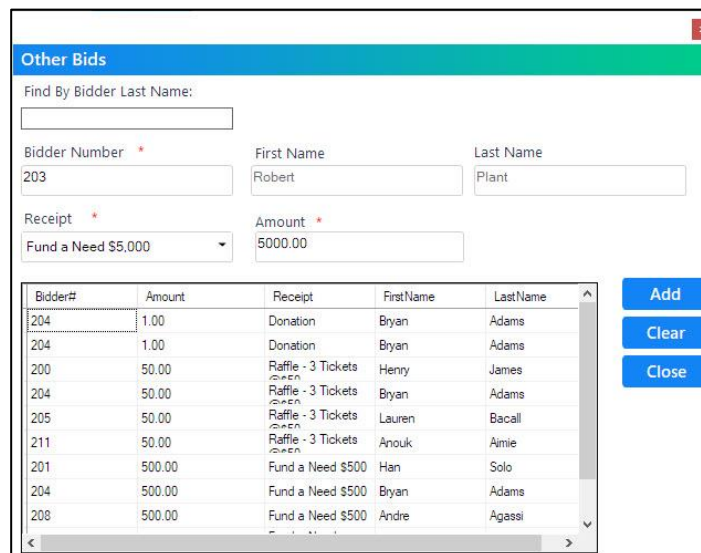


Figure 75 Other Bids Screen

Recommended: 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.

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: Quick Start or Section: Setting Up the Bidstation App).

Summary:

Card payments are processed with Bidstation use Square. Bidstation tracks all winning bids, purchases and donations by bidder number.

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. 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

Raffle x1 - \$10	Raffle X3 - \$20	Raffle X10 - \$50	Glasses @\$20	Wine Pull@ \$30	Drink Ticket \$10
500	125				100
125	125				
125					
100					
100					

Figure 76 Tally Sheet Example

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 immediately (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: Checkout with a Credit Card) and process payment.

Cash, Check and Split Payments can also be managed in the app.

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

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). If the attendee has a balance owing, the Save Card button will instead read Payment and tapping this button will allow you to proceed to either save the card on file for future processing, or process the card payment live.

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.
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 (or Payment, if the attendee has a balance owing).
5. Present the screen to the cardholder for them to tap and agree to save card on file.
6. When prompted on screen, swipe, insert chip or manually key in card details.
7. Follow prompts to complete the card save.
8. Bidstation confirms 'Card on file added successfully', and the process is complete. Tap Okay.

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

Pre-registering credit cards at Check-in is not required by the system but it is encouraged as it helps eliminate lines at Checkout and allows guests to enjoy a cashless event. If an attendee prefers not to save a card on file at Check-in you can save it or take payment at Checkout.

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, in a batch. 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 or if saving the card on file is not required.

The Bidstation app lets you process the balance owing at any time for guests who have a Card Saved on File and a balance owing. Just tap Check In Check Out, tap the guest's name, tap Make Payment, and then tap Process Payment. The attendee's card will still be on file, and if a subsequent balance is owing it can still be processed after the event. The balance owing is updated in the Attendee's profile and the Attendee list whenever the screen is changed or refreshed.)

If the attendee does not have a card on file, the app will provide the option to save it on file or to process the payment live.

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 if you plan to send invoices or receipts by email.

You can change an attendee's details once they are in the system by making changes in the app.

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. 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.

Controlling App 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.

Troubleshooting for the Bidstation App at the Event:

- Declined payment – If a payment is declined, ask the guest for an alternate credit card.
- Prefer not to Save Card – If an attendee does not want to Check in with a Card on File, tap Update only (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.
- Split payments: It is possible for a guest to make a partial payment on a balance owing. 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.
- ‘Make Payment’ does not appear at the bottom of the Attendee’s profile’ – There is no balance owing.

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 desktop via 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 may leave without checking out if they have saved a Card on File.

Processing Payments in a Batch After the Event

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 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).



Figure 77 Grand Total – Visible from Dashboard

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. 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.

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. 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.

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.

License Agreement

Bidstation End User License Agreement (EULA)

Carefully read the following terms and conditions before installing Bidstation software. Installing this software indicates your acceptance of these terms and conditions. This agreement applies to you, your organization and any subsequent licensee of this software program. If you, an authorized representative of the licensing organization, do not agree to the agreement terms, do not proceed with installation. If you have purchased a license for Bidstation software and you do not agree with the terms of this agreement, you may request a full refund within 30 days of purchase.

This agreement is current as of January 8, 2026.

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AuctionZoom Ltd., ("AuctionZoom") grants you a non-exclusive, non-transferrable, license to install and use the Bidstation product defined as Bidstation ("Bidstation") subject to the terms and conditions set forth in this agreement. You are responsible for the selection of the proper quantity of equipment to achieve your intended results.

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3. Restrictions on use

You may install and use Bidstation on multiple computers. However, you may not reverse engineer, decompile or disassemble Bidstation or attempt to operate Bidstation with equipment other than that provided by AuctionZoom. You may not lend, sublicense, rent, lease, or redistribute Bidstation.

4. Fee increases

AuctionZoom may increase or decrease service fees from time to time. Notice of fee changes shall be provided by email notification to the contact address provided to AuctionZoom by your organization.

5. Money-back guarantee

AuctionZoom warrants that the Bidstation, unless modified by you, will perform substantially in accordance with the user manual documentation. If for any reason the organization is not completely satisfied with Bidstation, we will refund the license fee. If requesting a license fee refund, send the request to use by email: orders@auctionzoom.com. Refunds will not include shipping fees paid.

Neither AuctionZoom nor its distributors/affiliates warrant that the performance of the Bidstation will meet your requirements or that the operation of the Bidstation will be error-free, or that defects in the Bidstation will be corrected.

6. Data/information ownership

AuctionZoom products, including Bidstation, are not designed to capture or retain any personal, private or financial information for AuctionZoom use. All personal, private or financial information captured by Bidstation software remains the sole property of your organization, including all rights and responsibilities for holding that personal, private or financial information.

Neither AuctionZoom nor its distributors/affiliates can be made liable for any losses as a result of misuse of your organization's information.

7. Limitation of remedies and liability

The remedies described in this agreement are your exclusive remedies and AuctionZoom's entire liability. In no event will AuctionZoom or its affiliates be liable to you for any damages, including lost profits, lost benefits, or other incidental or consequential damages, resulting from the use of or inability to use the Bidstation or any breach of warranty. AuctionZoom's and its affiliates' liability to you for actual damages for any cause whatsoever, and regardless of the form of action, will be limited to the money paid for the Bidstation license that caused the damages or that is the subject matter of, or is directly related to, the cause of action.

8. Support subscription

License subscribers will receive email support at no charge. Support may also include phone and screen sharing sessions, where necessary, and at AuctionZoom's option.

What is not included in the support is consultation and/or training relating to how to run an auction or how to organize an auction event. AuctionZoom has assembled full user manuals, videos and other support and training options to create a self-serve training environment. If additional consultation and/or training, we may provide those services for additional fees or refer you to one of our auction partners.

9. Termination

Your organization may terminate this agreement by submitting notice of termination to AuctionZoom in writing at any time via email or mail to these contacts:

Email: orders@auctionzoom.com

Mail: AuctionZoom Ltd.

PO Box 19145

Fourth Ave. PO

Vancouver, BC V6K 4R8

Canada

Upon termination of this license agreement, all copies of Bidstation software must be deleted and removed. Any equipment provided by AuctionZoom as part of the Bidstation purchase must be returned to AuctionZoom in a secure package and delivered at your expense.

If you have any questions concerning this agreement, please contact us at 1-866-410-6865 or by email: support@auctionzoom.com