

# Convention Manager Onsite Staff Guide

AA/Al-Anon Convention

July 6, 2023

# Contents

<b>1 Onsite Checkins</b>	<b>2</b>
1.1 Pre-Registration Desk . . . . .	2
1.2 Registration Desk . . . . .	2
<b>2 Onsite Point of Sale Operations</b>	<b>4</b>
2.1 Processing sales . . . . .	4
2.2 For sales of items without pre-set prices . . . . .	4
<b>3 Mobile Device Procedure</b>	<b>6</b>
3.1 How to Use the iPad . . . . .	6
3.2 How to Use a Mobile Phone . . . . .	6
3.3 Connecting to a Reader . . . . .	7
3.4 To change readers . . . . .	7
<b>4 District 22 Devices</b>	<b>8</b>
4.1 iPads . . . . .	8
4.1.1 iPad #1 . . . . .	8
4.1.2 iPad #2 . . . . .	8
4.2 Card Readers . . . . .	9
4.2.1 Reader M2 #1 . . . . .	9
4.2.2 Reader M2 #2 . . . . .	9

# Chapter 1

## Onsite Checkins

When convention attendees enter the building, they will go to one of two desks depending on whether they pre-registered online or have not yet registered. Below are the steps required for managing the attendees.

### 1.1 Pre-Registration Desk

If the guest has pre-registered, they should go to the Pre-Registration desk. Here is the sequence of events that take place there. If the guest did not pre-register, steer them to the Registration desk.

1. Guests identify themselves by Last Name, First Name.
2. Locate their registration packet.
3. Pull out the contents from the packet.
4. Compare the packet contents with the envelope label with the attendee.
5. If everything checks out, hand them the contents.
6. Steer the attendee to the badge holders table where they can get their badge holder with lanyard for each badge.
7. Save the envelope in the box under the table.

### 1.2 Registration Desk

If the guest has not pre-registered, they should go to the Registration desk. Here is the sequence of events that take place there. If the guest pre-registered, steer them to the Pre-Registration desk.

1. Attendee picks up a paper form from the Registration Desk.

2. Attendee fills out the form.
3. Attendee takes the filled out form back to the Registration Desk.
4. Staff person processes the payment for registration(s) by credit card or cash.
5. Staff person stamps the registration form as "Paid".
6. Attendee takes the paid form to the data entry person.
7. Data entry person enters the info into the Access database.
8. Data entry person prints the Badge(s).
9. Data entry person steers the attendee to the badge holders table where they can get their badge holder with lanyard for each badge.

## Chapter 2

# Onsite Point of Sale Operations

This procedure describes the roles and functions for volunteers who process on-site registrations and merchandise sales during the convention. There are two tables set up.

1. Registrations
2. Merchandise

Each table will have a Stripe card reader to process credit card transactions.

### 2.1 Processing sales

For sales of items with pre-set prices

1. On the main screen make sure to start with \$0.00.
  - (a) If you need to clear, tap on Number Pad and then tap Clear until all \$0.00's appear.
2. Tap on Inventory Mode.
3. For each item being sold, select the quantity being sold from item in the Inventory list.
4. Verify that the sale amount is incrementing correctly.
5. Tap Continue.
6. Verify with the attendee that the order is correct.
7. When prompted, ask the attendee to either tap or insert their card.

### 2.2 For sales of items without pre-set prices

In the unlikely event of a sale for an item not in the pre-loaded inventory, follow these instructions. This is very similar to the above items. The main difference is you will be entering the sale price manually along with a description.

1. On the main screen make sure to start with \$0.00.
  - (a) If you need to clear, tap on Number Pad and then tap Clear until all \$0.00's appear.
2. Tap on Number Pad.
3. Enter the amount of the sale.
4. Type in a description.
5. Tap Continue.
6. When prompted, ask the attendee to either tap or insert their card.

## **Chapter 3**

# **Mobile Device Procedure**

When using the Stripe M2 Card Reader, a mobile device is required.

### **3.1 How to Use the iPad**

One or more iPads may have been provided to this convention to be used for onsite point of sale transactions. These devices have been pre-configured for your convention and should work with little effort.

To use them, follow these steps:

1. Power on with the switch in the upper left corner.
2. Click the Home button.
3. Enter the passcode (061035).
4. Open the "Collect" app.
5. Process an order using the instructions below.

### **3.2 How to Use a Mobile Phone**

If you do not have pre-configured devices, you will need to configure your mobile phone as described here.

1. Find and install the "Collect for Stripe" app on your mobile device's app store.
2. Launch the app.
3. Sign in using the Collect Account Sign-In (not Connect with Stripe).
  - (a) You will be provided the credentials for this.
4. You are now ready to process purchases.

### **3.3 Connecting to a Reader**

1. The first time you use the app you will see a prompt: “Connect Reader”. The next sequence of steps will be similar but not exactly to to this:
  - (a) Which type of reader?
    - i. Bluetooth
      - A. Stripe Reader M2 (this is the small white reader)
    - ii. Internet
      - A. BBPOS WisePOS E (this is the larger black reader)
      - B. Stripe Reader s700 (not yet released as of this writing)
  - (b) Tap on the appropriate reader.
  - (c) Discovering
  - (d) System automatically selects the reader you chose.
  - (e) Select Location Veteran’s Hall
  - (f) If no locations found click refresh
  - (g) Click Veteran’s hall
  - (h) Now it should be loaded correctly
  - (i) Tap Continue.
  - (j) Connecting.
  - (k) You may see some details about the reader.
  - (l) Tap through until you get to main screen again.

### **3.4 To change readers**

1. Tap on currently connected reader.
2. Disconnect.
3. Repeat the above steps.



## Chapter 4

# District 22 Devices

### 4.1 iPads

There are two iPads. One for Registration desk and one for the merchandise desk. Each one is to be connected via bluetooth to a M2 Stripe reader. All devices have been identified with a number 1 or 2 by Sharpie pen.

#### 4.1.1 iPad #1

Passcode: 061035

Password for other accesses: jUne10,1935

Specifications

```
iPadOS Version: 16.5.1
Model Name: iPad (6th Generation)
Model Number: MRJN2LL/A
Serial Number: GG7XNX4BJMVR
```

```
Capacity: 32 GB
Available: 21.35 GB
```

#### 4.1.2 iPad #2

Pass code: 061035

Password for other accesses: jUne10,1935

Specifications

```
iPadOS Version: 16.5.1
Model Name: iPad (6th generation)
```

Model Number: MRJN2LL/A  
Serial Number: DMQXP9PZJMVR

Capacity: 32 GB  
Available: 22.43 GB

## **4.2 Card Readers**

### **4.2.1 Reader M2 #1**

#### Specifications

Stripe Reader M2  
Reader ID tmr\_FKPSZgLywbLSvj  
Serial number STRM26227012966  
Model Stripe Reader M2

### **4.2.2 Reader M2 #2**

#### Specifications

Stripe Reader M2  
Reader ID tmr\_FKPHog3oEjAtMb  
Serial number STRM26227012967  
Model Stripe Reader M2