

# EVO-AUCTION USER GUIDE

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Evo-soft Ltd.  
The Upper Courtyard  
The Old Dairy  
Badbury  
Swindon  
Wiltshire SN4 0EU

Tel. 01793 677 633  
[info@evo-soft.co.uk](mailto:info@evo-soft.co.uk)  
[www.evo-soft.co.uk](http://www.evo-soft.co.uk)

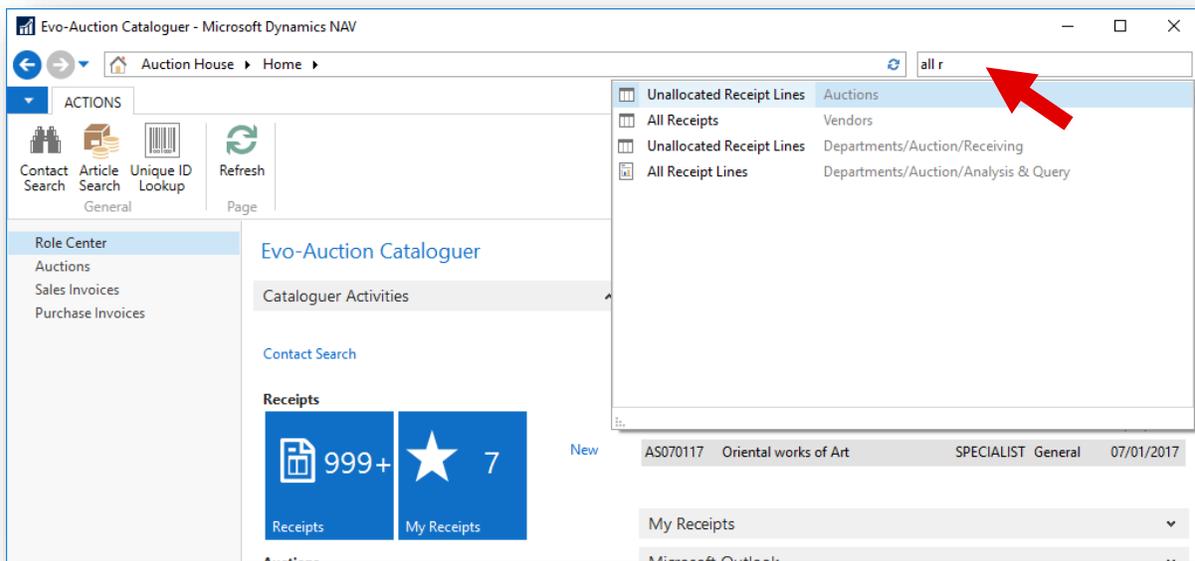
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# 1.1 NAVIGATION & BASIC FUNCTIONALITY

## SEARCH

You can find any page, report, or view in your installation by using the **Search** field in the top right corner of the address bar.



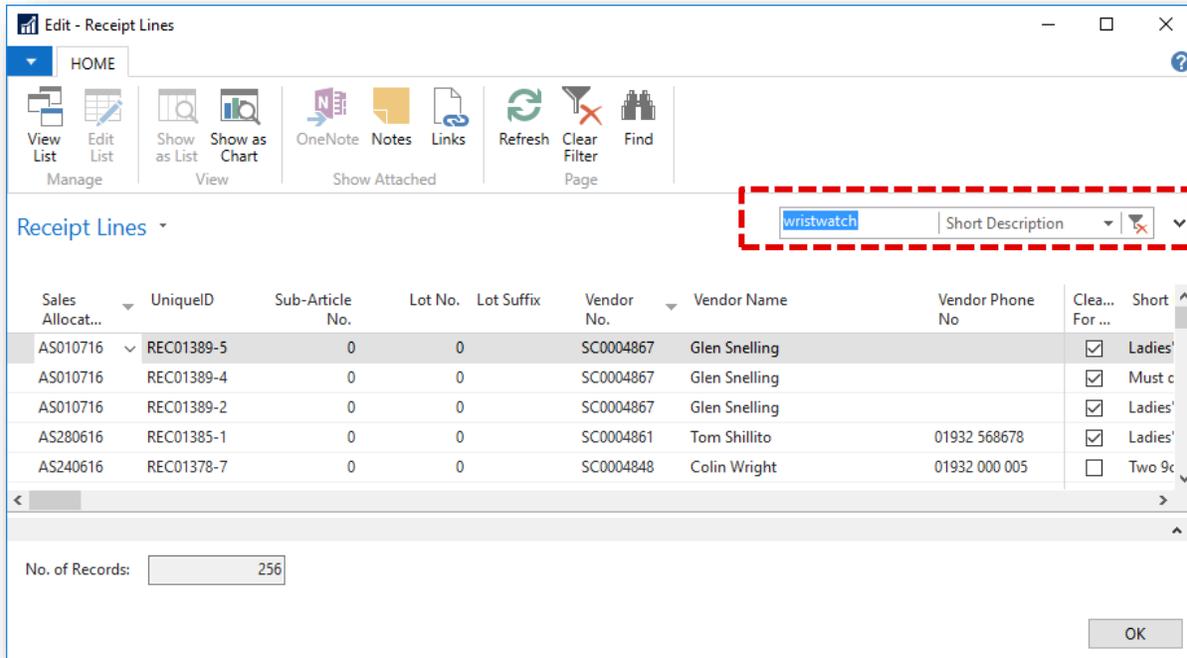
When you start typing characters in the **Search** field, a drop-down list shows page names containing the character(s) you type. The drop-down list changes as you type more characters, and you can select the correct page from the list when it is displayed. The second column in the drop-down list shows the navigation paths to the found pages and can be used to navigate to the **Departments** page where that page exists.

### NOTE

Search only finds pages and reports that are accessible from the navigation pane, which includes the Home button, Activity buttons, and Departments.

## SEARCHING FOR DATA

In the Evo-auction you can use the **Search** functionality to limit a data set across columns on lists. **Search** is enabled by entering criteria in search box. The search is cleared by selecting the cross next to the search box.



The following table illustrates some **Search** text examples:

Search Criteria	Interpreted as...	Returns...
man	@*man*	All records that contain the text <b>man</b> and case insensitive.
se	@*se*	All records that contain the text <b>se</b> and case insensitive.
Man*	Starts with Man and case sensitive	All records that start with the text <b>Man</b> .

'man'	An exact text and case sensitive	All records that match <b>man</b> exactly.
@*man	Ends with and case insensitive	All records that end with <b>man</b> .
@man*	Starts with and case insensitive	All records that start with <b>man</b> .

## FIND/GO TO

In Evo-auction you can search in data by using the **Find** mechanism. **Find** searches on all types of pages that have data, except in chart pages. You specify the field you want to search in and the string you want to search for. **Find** is also available from the action strip.

### NOTE

On card pages the same type of Find functionality is also available, but due to the nature of cards, the functionality is named Go to. You use **Find** and **Go to** in the exact same way.

**Edit - Receipt Lines**

HOME

View List Edit List Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Page **Find**

Receipt Lines  Short Description  No filters applied

Sales Allocat...	UniqueID	Sub-Article No.	Lot No.	Lot Suffix	Vendor No.	Vendor Name	Vendor P No
AS050716	REC01391-4	0	0		SC0004867	Glen Snelling	
AS050716	REC01391-3	0	0		SC0004867	Glen Snelling	
AS050716	REC01391-2	0	0		SC0004867	Glen Snelling	
AS050716	REC01391-1	0	0		SC0004867	Glen Snelling	
AS010716	REC01389-5	0	0		SC0004867	Glen Snelling	
AS010716	REC01389-4	0	0		SC0004867	Glen Snelling	

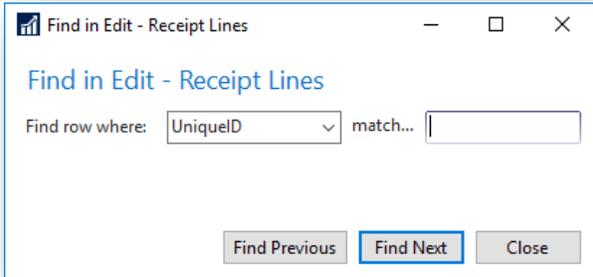
No. of Records:

OK

In the **Find in** window, select the row that you want to search for a specific string or data in.

In the matches field, enter the string or number that you want to search for.

Choose the **Find Next** button to start the search. Use the **Find Next** and the **Find Previous** buttons to search through rows. Toggle between the list and the Find window to make edits and continue searching.



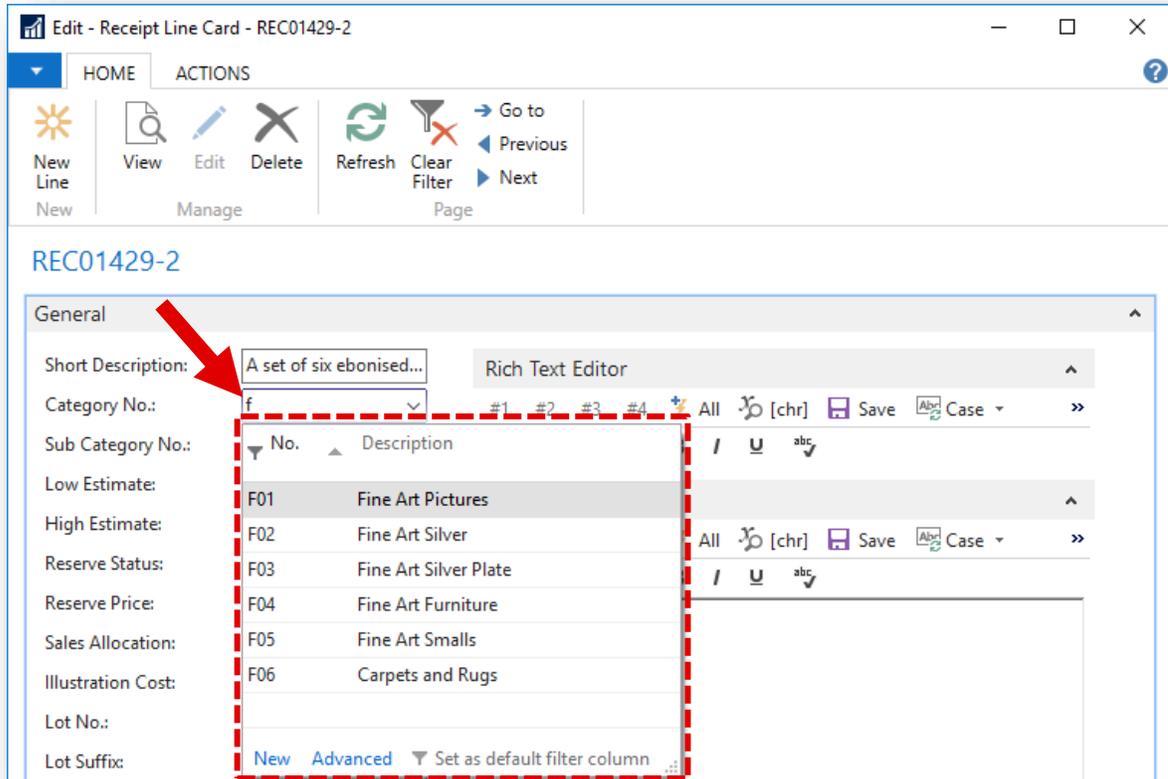
Choose the **Close** button when you have finished searching.

## ENTER DATA

In Evo-auction, there are many general functions that help you enter data in a quick and easy way.

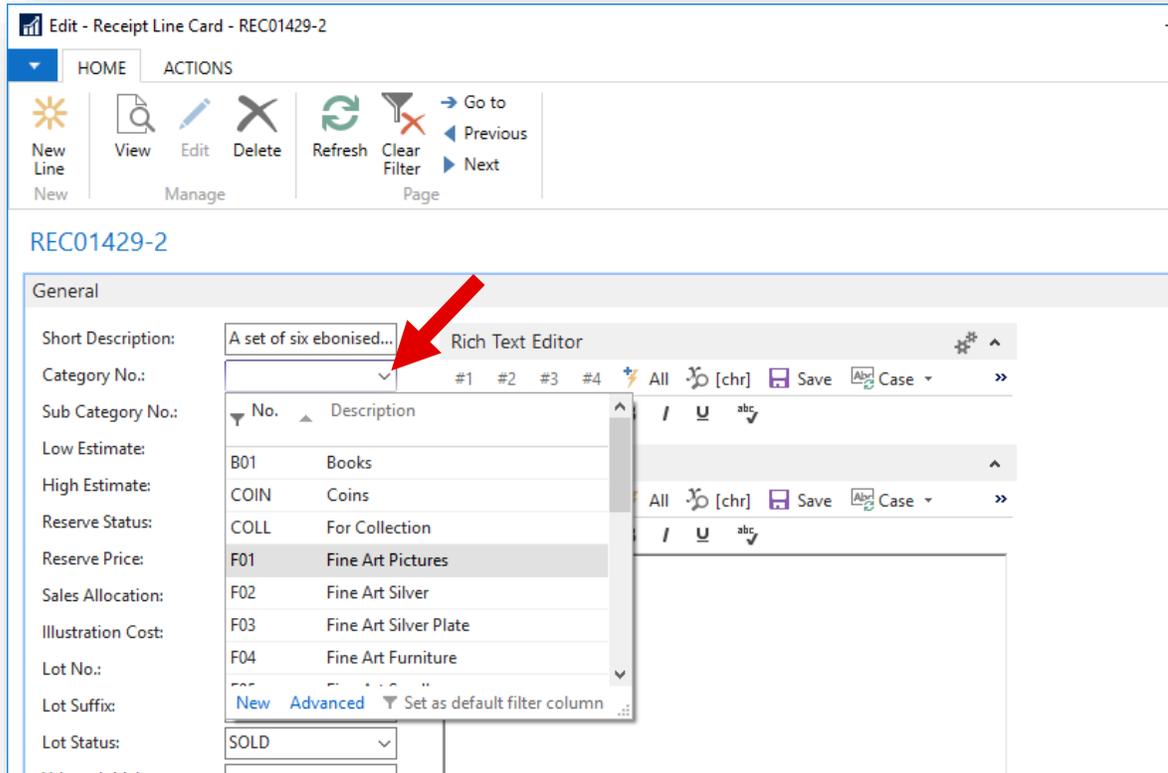
### FIND DATA AS YOU TYPE

When you start to type characters in a field, a drop-down list is displayed and shows possible field values. The list changes as you type more characters, and you can select the correct value when it is displayed.

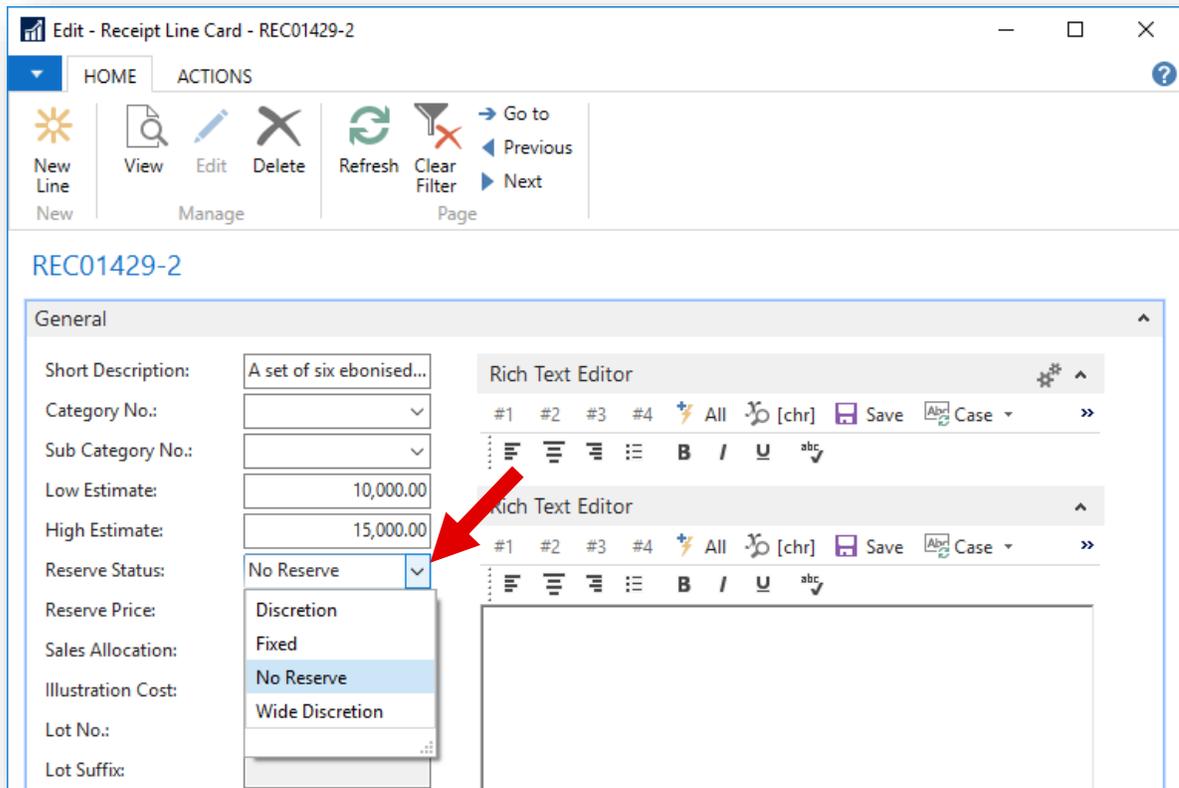


Many fields in Evo-auction have a Down Arrow button that you can choose. You choose the arrow to get a list of data that is available to enter in the field. The button has two functions depending on the type of field:

- Lookup - Displays information from another table that you can enter in the field. You can select one piece of data at a time.

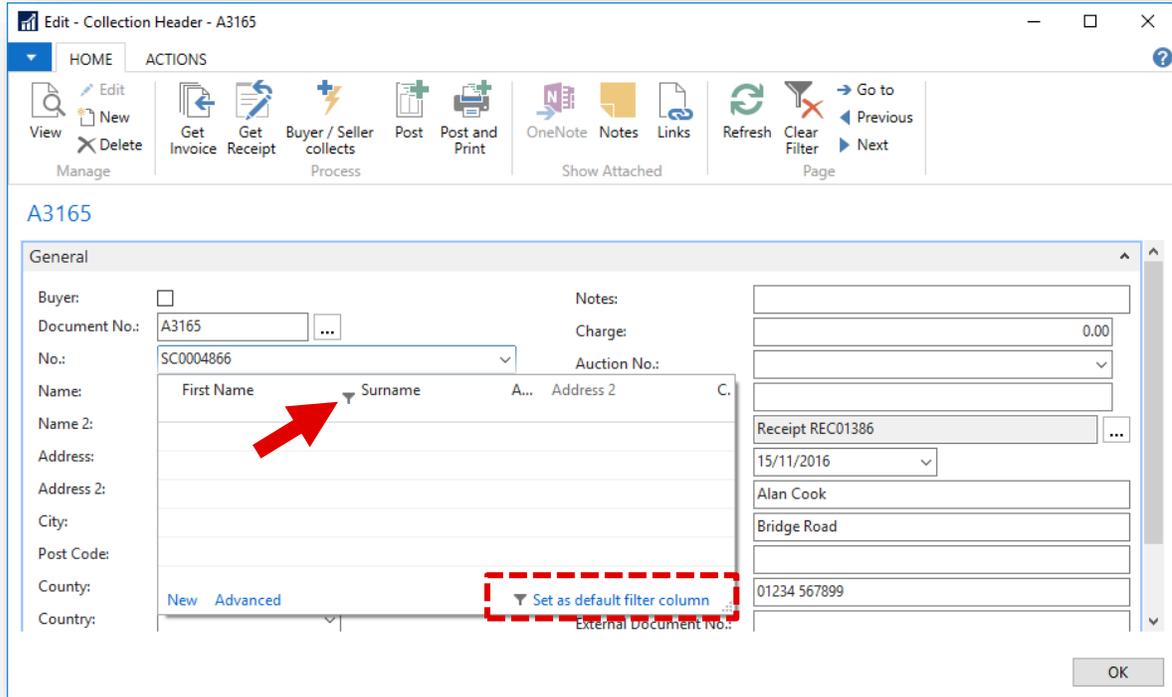


- Drop-down - Displays the set of options that exist for the field. You can select only one of the options.



## DEFAULT SEARCH COLUMN

To search in specific column and make it your default filter column, while the drop-down list is open, press the Down Arrow key to move control into the drop-down, then press the Right Arrow key to move to the column. Select **Set as default filter column** in the lower-right corner. Next time that you type something in that field, the column field will be used for filtering, even if you leave the field without opening the drop-down list.



## COPY FIELDS OR LINES

Depending on the type of writable document, you can copy individual line fields or whole lines to other lines in the document. Read-only data, such as posted entries, cannot be copied inside Evo-auction.

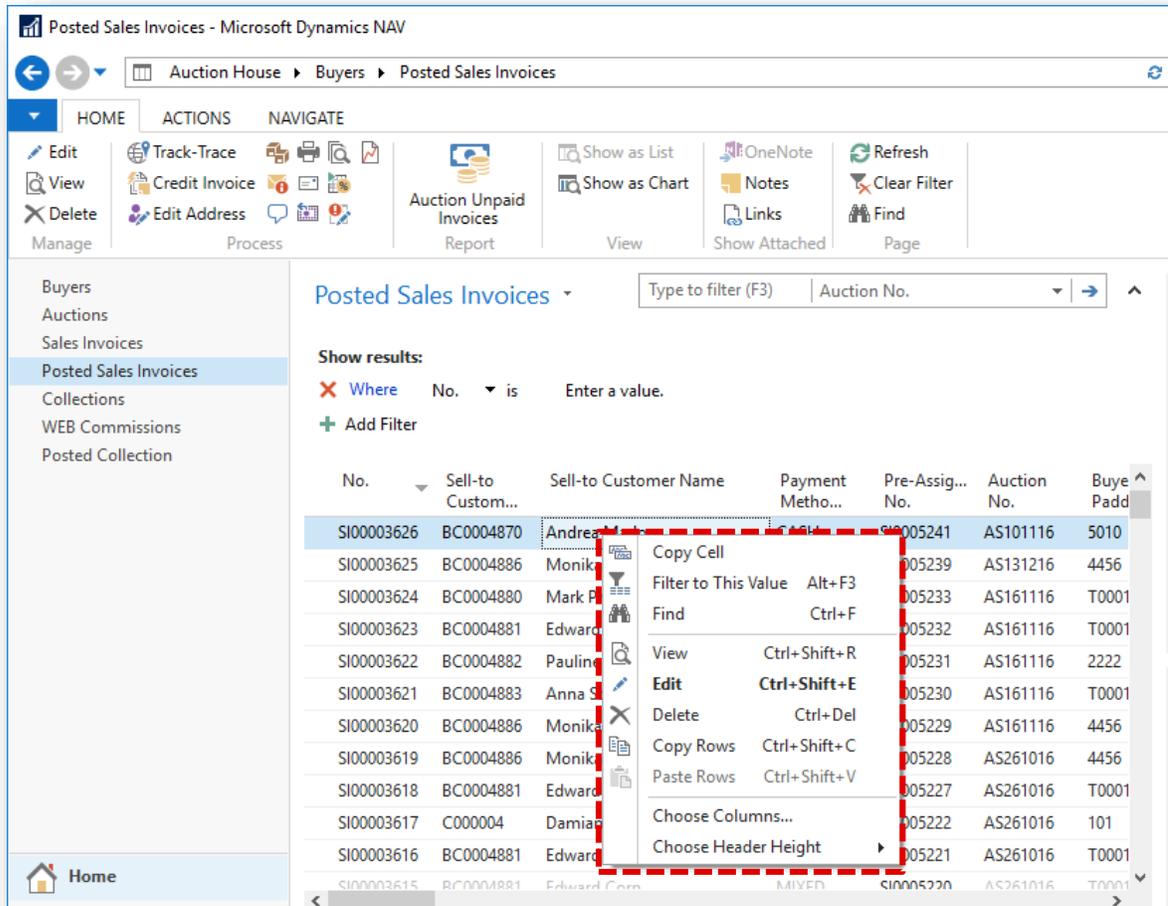
Several database dependencies are used to determine if fields or lines can be copied. One way to determine these dependencies is to view the shortcut menu. The content of the shortcut menu indicates which copy functions are supported by displaying either of these functions:

- Copy Cell
- Copy Rows
- Paste Rows

If the Paste function is not available, this indicates that you can only paste the data into external documents. Single fields on a sales line, however, can be copied to the same column in other sales lines.

Journal lines are very flexible and can be copied freely in the same journal, indicated by the presence of Paste on the shortcut menu.

To view the shortcut menu, right click on a line or a cell.



## ENTER CODES

A code identifies a record such as a vendor number or customer number. Codes are also values that are used for sorting information on the screen and in reports. Numbers and letters can be used to identify codes.

When you have to enter a code in a field, look up (press F4) to select from the list of codes related to the field.

Instead of selecting a code, you can type it in the field. In that case, you only have to enter the first letter(s) in the code name. For example, type "y" for YELLOW.

Codes are usually assigned automatically from the number series when you move to the next field.

## MANDATORY FIELDS

When you enter data on pages in Evo-auction, certain fields are marked with a red asterisk. The red asterisk means that the field must be filled to complete a certain process that uses the field.

Even though the field contains a red asterisk, you are not forced to fill the field before you continue to other fields or close the page. The red asterisk only serves as a reminder that you will be blocked from completing a certain process.

The screenshot shows a 'General' form with the following fields:

- No.:** BC0004893
- Name:** \* (highlighted with a red dashed border)
- Name Details:** Salutation Code, First Name, Middle Name
- Address:**
- Address 2:**
- City:**
- County:**
- Post Code:**
- Country/Region Code:**
- Phone No.:**
- Mobile No.:**
- E-Mail:**
- Balance (LCY):** 0.00
- Blocked:**
- Last Date Modified:** 23/01/2017

## ENTER DATES AND TIMES

You can enter dates and times in all the fields that are specifically assigned to dates (date fields).

How you enter dates depends on the settings that have been selected in the Regional and Language Options window in the Control Panel. You can enter dates with or without separators.

### ENTERING DATES

In a date field you can enter two, four, six, or eight digits:

- If you enter only two digits, this is interpreted as the day, and it will add the month and the year of the work date.
- If you enter four digits, this is interpreted as the day and the month, and it will add the year of the work date.
- If the date you want to enter is in the range 01/01/1930 through 12/31/2029, you can enter the year with two digits; otherwise, enter the year with four digits.

You can also enter a date as a weekday followed by a week number and, optionally, a year (for example, Mon25 or mon25 means Monday in week 25).

Instead of entering a specific date, you can enter one of two codes.

Code	Result
t	This is today's date (the system date for the computer).
w	This is the work date. To define the work date, On the <b>Application</b> menu  , choose <b>Set Work Date</b> . If you do not define a work date, the system date will be used as the work date.

You may want to use a work date if you have many transactions with a date other than today's date.

## CLOSING DATE

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When you close a fiscal year, you can use closing dates to indicate that an entry is a closing entry. A closing date technically is between two dates, for example between Dec 31 and Jan 1.

To specify that a date is a closing date, put C just before the date: C123101.

## ENTERING TIMES

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When you enter times, you can insert any separator sign that you want between the units, but it is not required.

You do not have to write minutes, seconds, or AM/PM.

The following table lists the various ways in which times can be entered and how they are interpreted.

Entry	Interpretation
5	05:00:00
5:30	05:30:00
0530	05:30:00
5:30:5	05:30:05
053005	05:30:05
5:30:5,50	05:30:05.5
053005050	05:30:05.05

You must enter two digits for each unit of time if you do not enter a separator.

## ENTERING DATETIMES

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When you enter datetimes you must enter a space between the date and the time.

The following table lists the various ways in which you can enter datetimes and how they are interpreted.

Entry	Interpretation
131202 132455	13-12-02 13:24:55
1-12-02 10	01-12-02 10:00:00
1.12.02 5	01-12-02 05:00:00
1.12.02	01-12-02 00:00:00

11 12	11-current month-current year 12:00:00
1112 12	11-12-current year 12:00:00
t or today	today's date 00:00:00
t time	today's date actual time
t 10:30	today's date 10:30:00
t 3:3:3	today's date 03:03:03
w or workdate	the working date 00:00:00
m or Monday	Monday of the current week 00:00:00
tu or Tuesday	Tuesday of the current week 00:00:00
we or Wednesday	Wednesday of the current week 00:00:00
th or Thursday	Thursday of the current week 00:00:00
f or Friday	Friday of the current week 00:00:00
s or Saturday	Saturday of the current week 00:00:00
su or Sunday	Sunday of the current week 00:00:00
tu 10:30	Tuesday of the current week 10:30:00
tu 3:3:3	Tuesday of the current week 03:03:03

## ENTERING DURATION

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You enter a duration as a number followed by its unit of measure.

You can also enter a number and it is automatically converted to a duration. The number you enter is converted according to the default unit of measure that has been specified for the duration field.

To see what unit of measure is being used in a duration field, enter a number and see which unit of measure it is converted to.

The number 5 is converted to 5 hrs, if the unit of measure is hours.

Duration	Unit of measure
2h	2 hrs
6h 30 m	6 hrs 30 mins
6.5h	6 hrs 30 mins
90m	1 hr 30 mins
2d 6h 30m	2 days 6 hrs 30 mins
2d 6h 30m 56s 600ms	2 days 6 hrs 30 mins 56 secs 600 msecs

## SETTING DATE RANGES

You can set filters containing a start date and an end date to display only the data contained in that date range or time interval. Special rules apply to the way you set date ranges.

Meaning	Sample expression	Entries included
<b>Equal to</b>	12 15 00	Only those posted on 12 15 00.
<b>Interval</b>	12 15 00..01 15 01 ..12 15 00	Those posted on dates between and including 12 15 00 and 01 15 01.  Those posted on 12 15 00 or earlier.
<b>Either/or</b>	12 15 00 12 16 00	Those posted on either 12 15 00 or 12 16 00.  If there are entries posted on both days, they will all be displayed.

You can also combine the various format types.

Sample expression	Entries included
12 15 00 12 01 00..12 10 00	Entries posted either on 12 15 00 or on dates between and including 12 01 00 and 12 10 00.
..12 14 00 12 30 00..	Entries posted on 12 14 00 or earlier, or entries posted on 12 30 00 or later - that is, all entries except those posted on dates between and including 12 15 00 and 12 29 00.

## USING DATE FORMULAS

A date formula is a short, abbreviated combination of letters and numbers that specifies how to calculate dates. You can enter date formulas in various date calculation fields and in recurring frequency fields in recurring journals.

### NOTE

In all data formula fields, one day is automatically included to cover today as the day when the period starts. Accordingly, if you enter 1W, for example, then the period is actually eight days because today is included. To specify a period of seven days (one true week) including the period starting date, then you must enter 6D or 1W-1D

Examples of how date formulas can be used:

- The date formula in the recurring frequency field in recurring journals determines how often the entry on the journal line will be posted.
- The date formula in the Grace Period field for a specified reminder level determines the period of time that must pass from the due date (or from the date of the previous reminder) before a reminder will be created.
- The date formula in the Due Date Calculation field determines how to calculate the due date on the reminder.

The date calculation formula can contain a maximum of 20 characters, both numbers and letters. You can use the following letters, which are abbreviations for time specifications.

C	Current
D	Day(s)
W	Week(s)
M	Month(s)
Q	Quarter(s)
Y	Year(s)

You can construct a date formula in three ways.

The following example shows how current plus a time unit.

CW	Current week
CM	Current month

The following example shows how a number and a time unit. A number cannot be larger than 9999.

10D	10 days from today
2W	2 weeks from today

The following example shows how a time unit and a number.

D10	The next 10th day of a month
WD4	The next 4th day of a week (Thursday)

The following example shows how you can combine these three forms as needed.

CM+10D	Current month + 10 days
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The following example shows how you can use a minus sign to indicate a date in the past.

-1Y	1 year ago from today
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## POST CODE AND CITY FIELDS

If you fill in **Post Code** field with a postcode that is linked to a single city in the **Post Code** table, Evo-auction fills in the **City**, **Country/Region**, and **County** fields automatically.

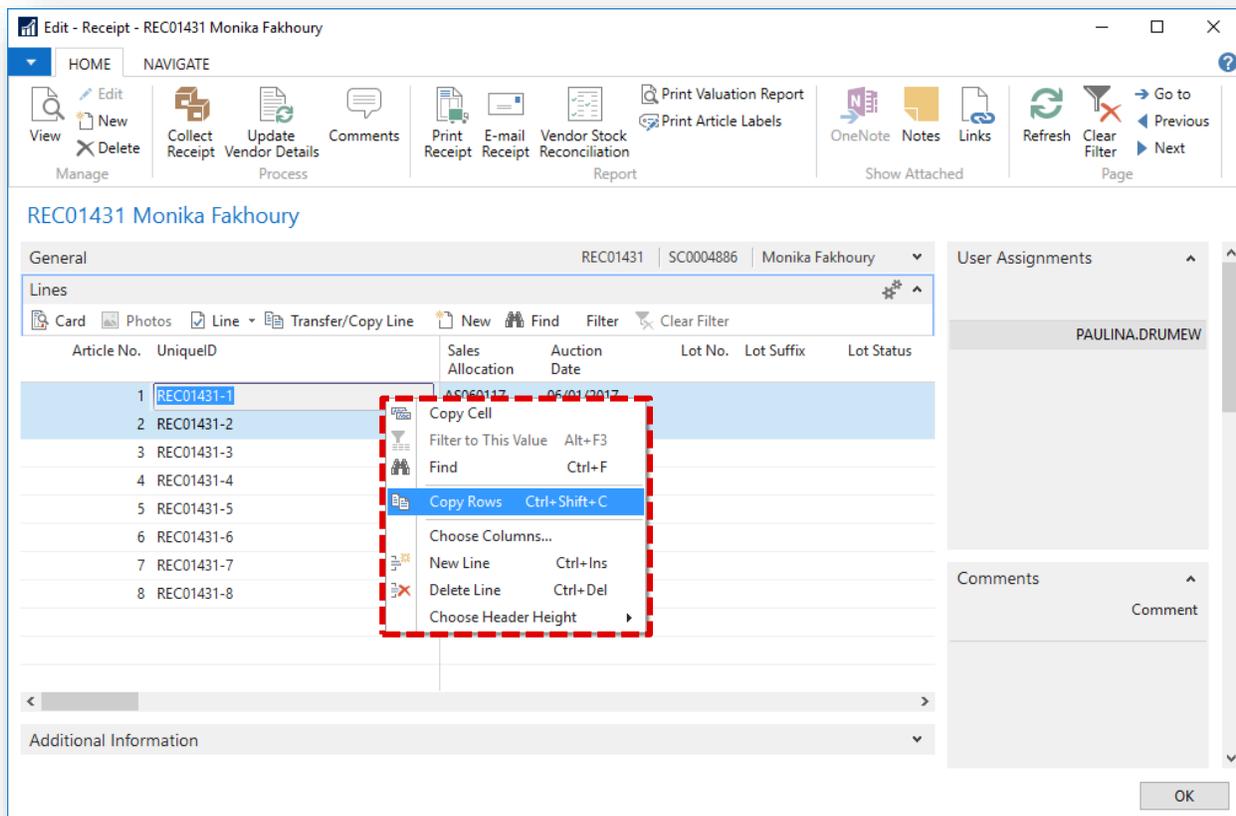
If there is more than one city linked to the post code, Evo-auction displays a list of the relevant cities for you to choose from. If the postcode is not set up in the **Post Code** table, you must enter the city manually.

If you fill in the **City** field before the **Post Code** field, and if the city is linked to a single postcode in the **Post Code** table, Evo-auction fills in the **Post Code**, **Country/Region**, and **County** fields automatically. If there is more than one postcode linked to the city in the **City** field, Evo-auction displays a list of postcodes for you to choose from. If the city is not set up in the **Post Code** table, you must enter the postcode manually.

## COPY AND PASTE ROWS

You can use the shortcut menu to copy and paste rows from Evo-auction. For example, you can copy lines from Evo-auction and then paste the lines into Microsoft Excel; or you can copy and paste lines into a list in Evo-auction to save time entering data.

To copy and paste rows, open the shortcut menu for one or more lines and choose **COPY ROWS**. Then open the shortcut menu again and choose **PASTE ROWS** to insert the copied rows.



## IMPORTANT

When pasting into Microsoft Dynamics NAV, the lines are validated and upon encountering the first erroneous line, the paste command is stopped. An error message is displayed, after which you can fix the error and continue to paste in lines.

You paste rows directly where your cursor is located. If you paste into an empty line, any existing subsequent lines will be moved after the pasted lines. If you paste into an existing line or lines, this will be overwritten.

## SORTING

The sorting function makes it easy for you to get a quick overview of your data. A sorted list can be saved using the **Save View As...** functionality, which is found by choosing the page title.

The screenshot shows the 'All Receipts' page in Microsoft Dynamics NAV. The 'All Receipts' page title is selected, opening a context menu with the following options:

- Filters
  - Advanced filter Shift+F3
  - Limit totals Ctrl+Shift+F3
  - Clear Filter Ctrl+Shift+A
- Views
  - Save View
  - Save View As...

The 'Save View As...' option is highlighted in blue. Below the menu, a table of receipt data is visible:

Receipt No.	Account No.	Name	Address	Address 2	City
REC01427	SC0004882	Pauline Duncan	4 Meadow View		Chertsey
REC01426	SC0004882	Pauline Duncan	4 Meadow View		Chertsey
REC01420	SC0004866	Alan Cook	Bridge Road		Shepperton
REC01419	SC0004867	Glen Snelling	Guildford Street		Chertsey
REC01418	SC0004871	Jim Capehorn	28 Mead Lane		Wadhurst
REC01417	SC0004882	Pauline Duncan	4 Meadow View		Chertsey
REC01409	SC0004875	Aaa Solicitors			
REC01408	SC0004875	Aaa Solicitors			
REC01407	SC0004878	Andy Galazka	63 Monks Ave		Somerton

The 'Save View As' dialog box is shown with the following details:

- Title: Save View As
- Message: Add this View to the Navigation Pane
- Name: All Receipts - [View]
- Activity Group: Home
- Buttons: OK, Cancel

If you have many customers, you can choose to sort your customers by:

- Customer No.
- Search Name
- Customer Posting Group
- Currency Code
- Country Region Code
- General Business Posting Group
- Name, Address, or City
- VAT Registration No.

You can choose to sort on a single column and in Evo-auction you can sort on multiple columns at a time. Use the following shortcuts for sorting:

Shortcut	Description
Left-click	Left-click on a column to sort a column ascending, then left-click again to toggle between ascending and descending.
Shift+left-click	On multiple column headers, the columns will all be sorted in the same ascending or descending direction.
Shift+double-click	If you are sorting on multiple column headers using Shift+left-click, you can use Shift+double-click on the first column you clicked on and this will toggle ascending/descending direction of all the columns included in the sorting.

**WARNING**

Sorting is not supported on images, BLOB fields, FlowFilters, and fields that do not belong to a table.

## SEND EMAIL MESSAGES

When Evo-auction is integrated with an email system, you can choose the button on the right side of the **E-Mail** field to open a window in which you can create and send a message.

Edit - Customer Card - BC0004882 · Pauline Duncan

HOME ACTIONS NAVIGATE REPORT

Sales Invoice Sales Order Reminder View Edit New Delete Cash Receipt Journal Sales Journal Apply Template... Statistics Customer - Balance to Date OneNote Notes Links Show Attached

BC0004882 · Pauline Duncan

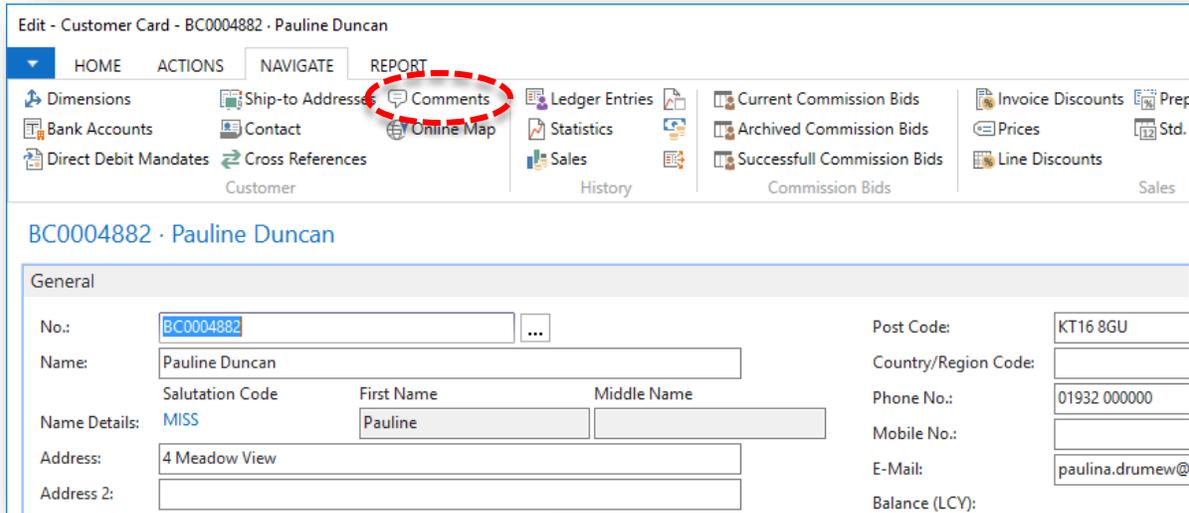
General

No.:	BC0004882	Post Code:	KT16 8GU
Name:	Pauline Duncan	Country/Region Code:	
Name Details:	Salutation Code: MISS First Name: Pauline Middle Name:	Phone No.:	01932 000000
Address:	4 Meadow View	Mobile No.:	
Address 2:		E-Mail:	paulina.drumew@... 
City:	Chertsey	Balance (LCY):	34.82 
County:	Surrey	Blocked:	
		Last Date Modified:	28/11/2016

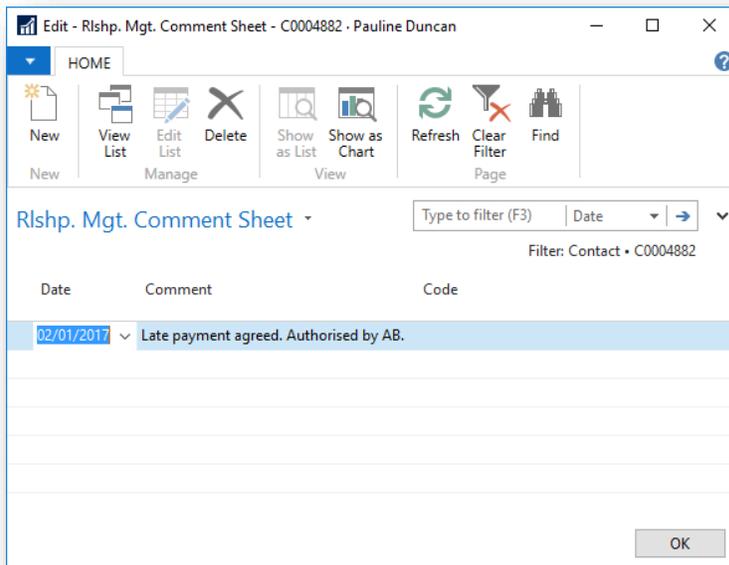
## CREATE COMMENTS

Comments are used to add extra information to accounts, customers, and so on. With comments you can, for example, specify that a customer has a certain agreement or has been behind with payments.

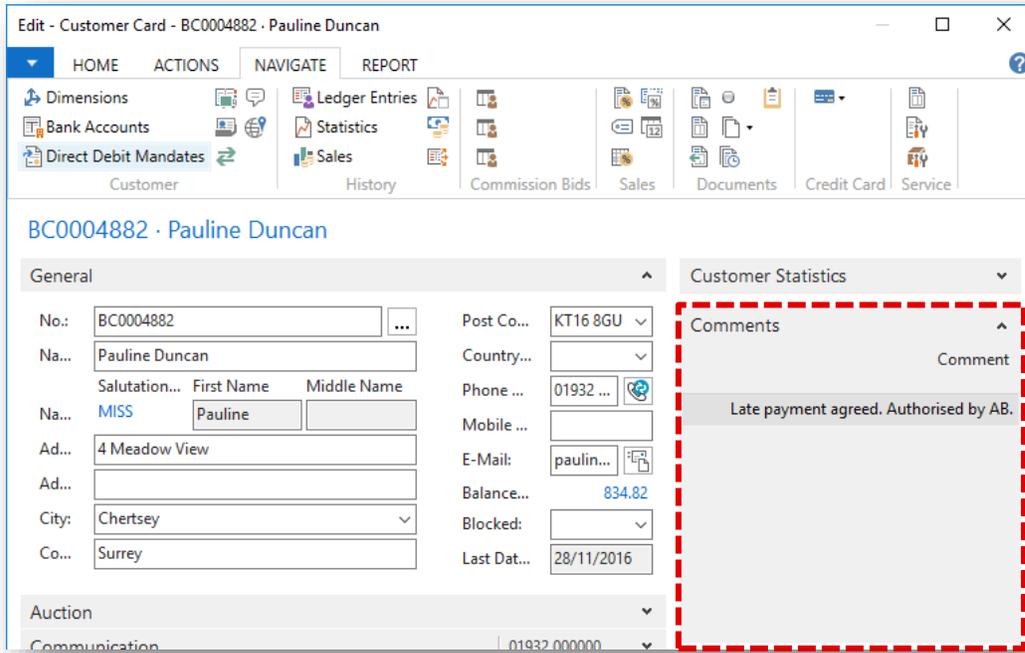
To create a comment, open a card and select **Comments** from the Ribbon.



The **Comments** window opens.



Registered comment are displayed in **FactBox** pane and synchronised between receipt, contact card, vendor and buyer card. Comments are available for a view but are not printed anywhere.



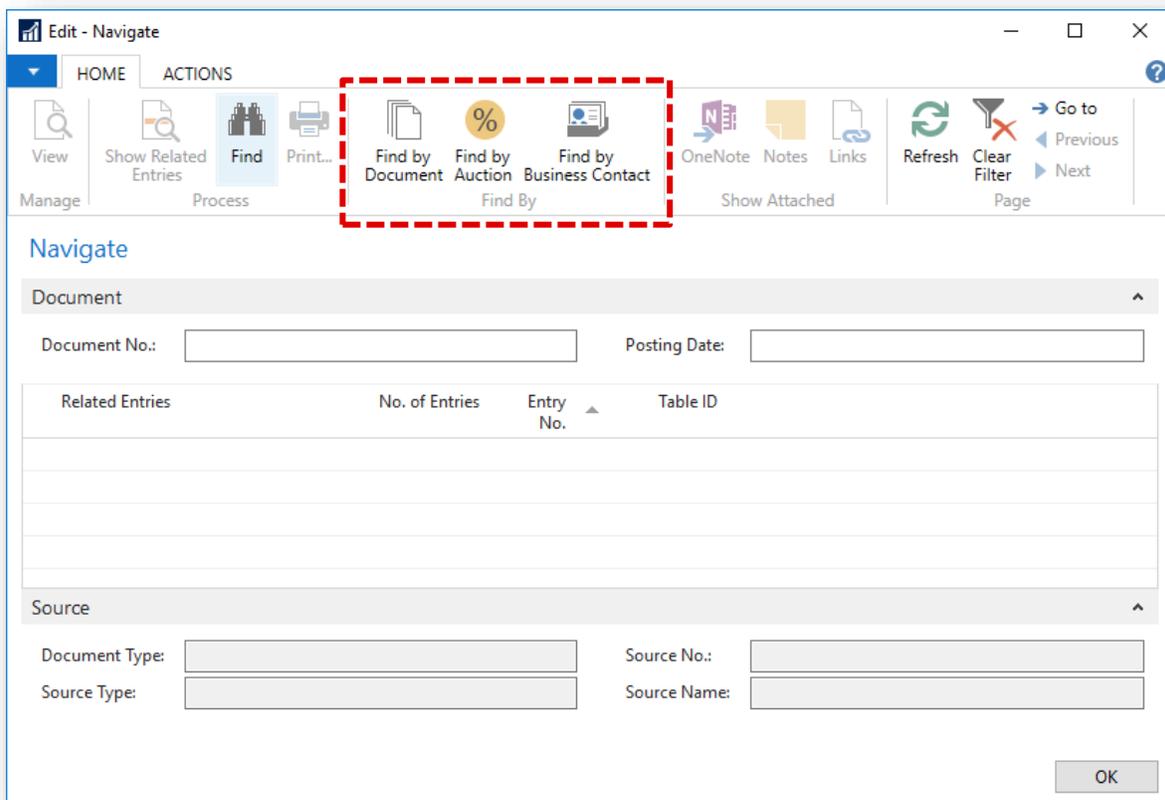
## THE NAVIGATE

In the **Navigate** window you can see a summary of the number and type of entries with the same document number or posting date. This feature is very useful when you need to find the ledger entries that resulted from certain transactions.

You can open the **Navigate** window in two ways:

- By opening an empty **Navigate** window, by using the Search box.
- From all windows that display posted entries and in posted sales invoices, purchase invoices, credit memos, receipts, and collections. In this case, the **Navigate** window will show the document number and posting date of the entries that you selected. The **Navigate** window also lists the documents that have the same document number and posting date as the entries that you selected.

The **Navigate** window has a different first FastTab, depending on your selection in the **Find by** group. You must enter information about the documents or item tracking numbers that you want to search for before information is filled in from the records located.



## FIND BY DOCUMENT

On the **Document FastTab**, enter the document numbers and posting dates.

The screenshot shows the 'Edit - Navigate' window with the 'Find by Document' action highlighted. The 'Document' section contains the following fields:

- Document No.:
- Posting Date:

Related Entries	No. of Entries	Entry No.	Table ID

The 'Source' section contains the following fields:

- Document Type:
- Source No.:
- Source Type:
- Source Name:

OK

Field name	Description
Document No.	Enter the document numbers on which you require additional information. You can insert a filter if you want Evo-auction to search for a certain interval of document numbers.
Posting Date	Enter the posting date on which the document you are searching for was posted. You can insert a date filter if the documents that you are searching for were posted in a certain time interval.

## FIND BY AUCTION

On the **Auction FastTab**, enter the auction numbers and posting dates.

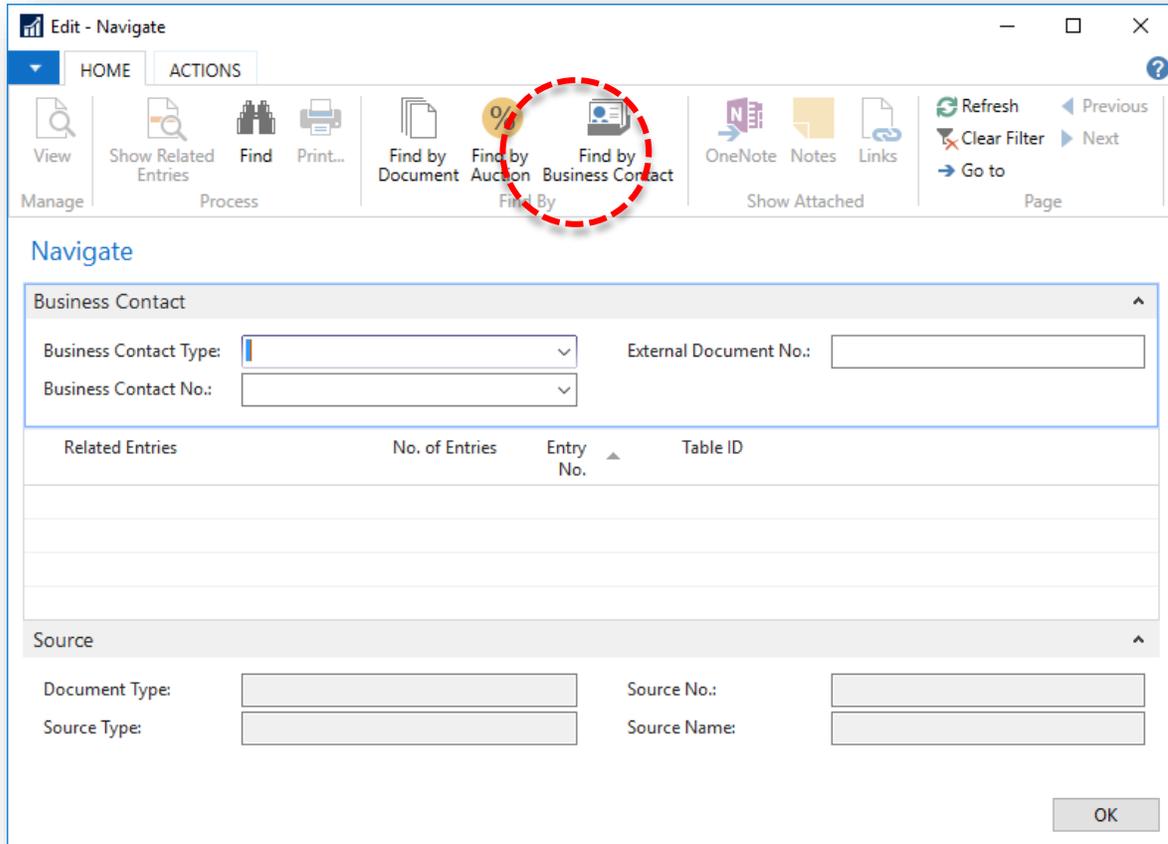
The screenshot shows the 'Edit - Navigate' window with the following elements:

- Navigation Bar:** Includes 'HOME' and 'ACTIONS' tabs. The 'ACTIONS' tab is active, showing icons for 'View', 'Show Related Entries', 'Find', 'Print...', 'Find by Document', 'Find by Auction' (circled in red), 'Find by Business Contact', 'OneNote', 'Notes', 'Links', 'Refresh', 'Clear Filter', 'Go to', 'Previous', and 'Next'.
- Navigate Section:** Contains a search form with 'Auction No.' and 'Posting Date' fields.
- Table:** A table with columns: 'Related Entries', 'No. of Entries', 'Entry No.', and 'Table ID'. It is currently empty.
- Source Section:** Contains fields for 'Document Type', 'Source No.', 'Source Type', and 'Source Name'.
- Buttons:** An 'OK' button is located at the bottom right.

Field name	Description
Auction No.	Enter the auction number on which you require additional information.
Posting Date	Enter the posting date on which the document you are searching for was posted. You can insert a date filter if the documents that you are searching for were posted in a certain time interval.

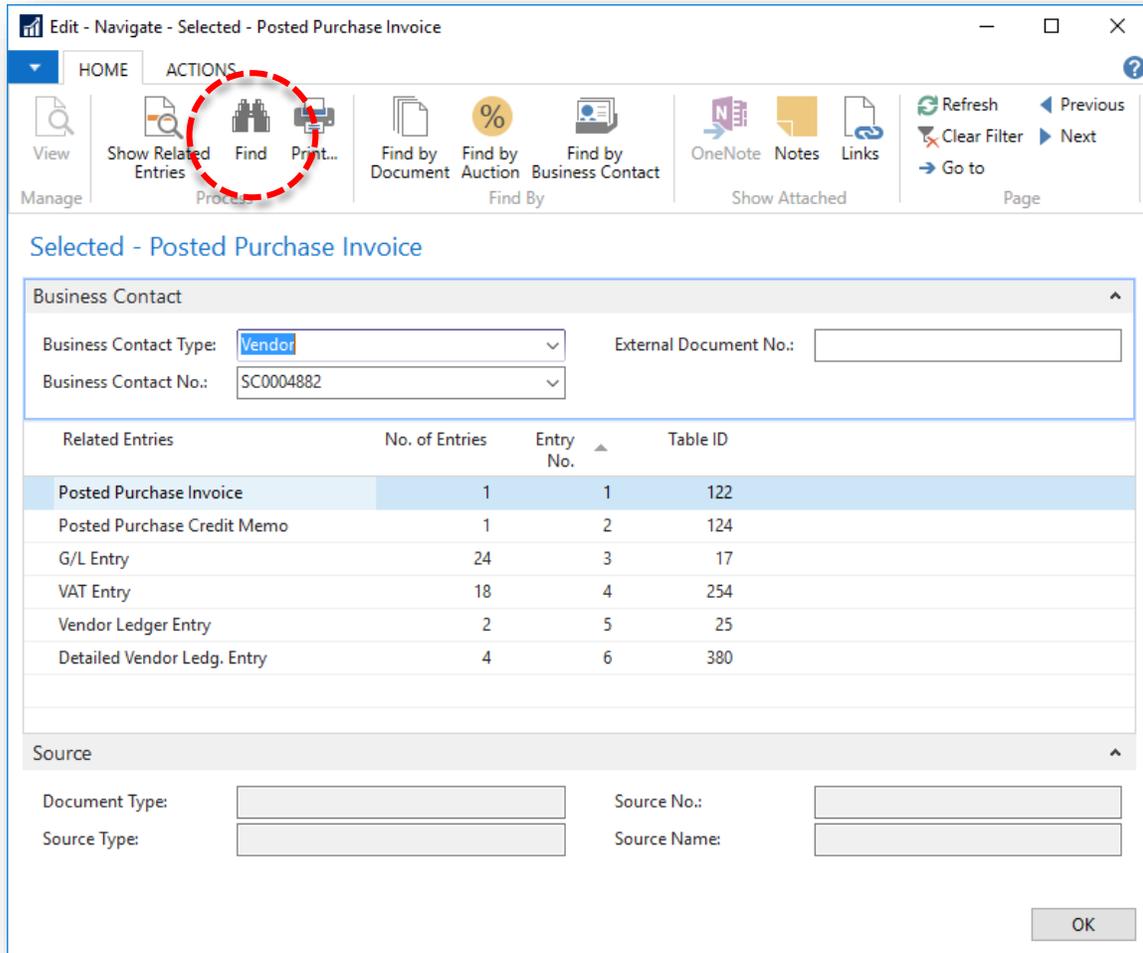
## FIND BY BUSINESS CONTACT

On the **Business Contact FastTab**, you can enter document information that was assigned by a vendor or a buyer. You can use the options on this tab to search for vendor documents by using the numbers that the vendor has assigned the documents.



Field name	Description
Business Contact Type	When you want to search for vendor or customer documents, select vendor or customer or leave it blank.
Business Contact No.	Select the number of the vendor or customer who assigned a number to the invoice that you are searching for.
Document No.	Enter the document number assigned by the vendor/customer. Evo-auction will match this number with the number in the EXTERNAL DOCUMENT NO. field for all customer or vendor ledger entries. Then will show all ledger entries that contain this document number.

After you have entered the relevant search information, select **Find** from the Ribbon to start the search. If you change any of the filters, you must choose **Find** again.



The NAVIGATE window shows the following information for the located documents:

- Related Entries
- No. of Entries
- Entry No.
- Table ID