



# 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 RECEIPT

Receipt is a page where you register all incoming stock from a vendor, and then allocate to an auction. Make sure the vendor card already exist on the system before you begin.

## CREATE NEW RECEIPT

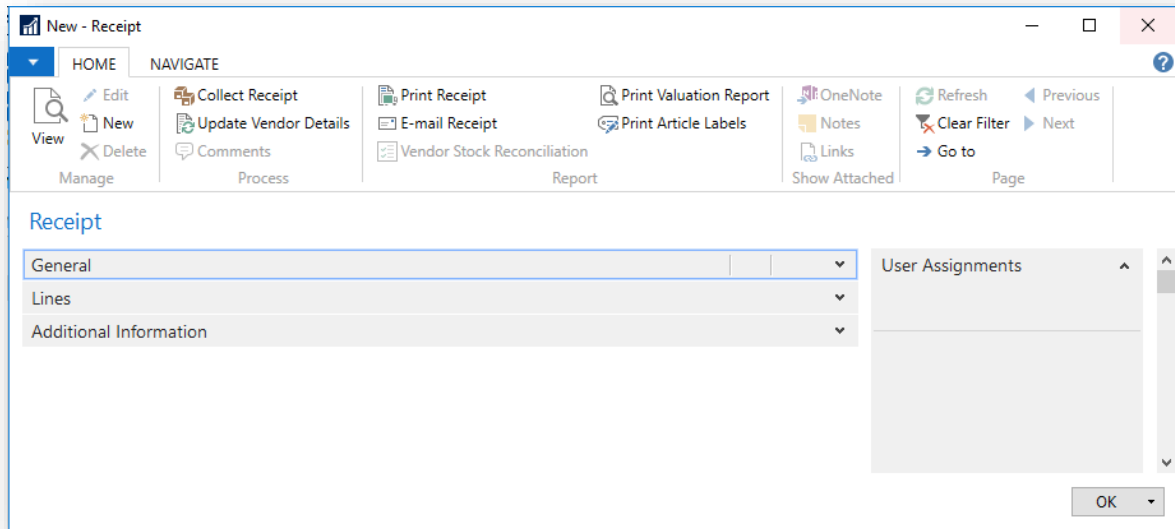
To create new Receipt:

1. In the Search box enter **All Receipts**, and then choose the related link.  
The **All Receipts** window opens.
2. Select **New** from the Ribbon.

The screenshot shows the 'All Receipts' page in Microsoft Dynamics NAV. The ribbon at the top has a 'HOME' tab with a 'New' button circled in red. The main content area displays a table of receipts. The 'User Assignments' pane on the right shows the user 'PAULINA.DRUMEW'.

No.	Vendor No.	Name	Address	Address 2
REC01421	SC0004861	Tom Shillito	70 Guildford Street	
REC01420	SC0004866	Alan Cook	Bridge Road	
REC01419	SC0004867	Glen Snelling	Guildford Street	
REC01418	SC0004871	Jim Capehorn	28 Mead Lane	
REC01417	SC0004882	Paulina Drumew	4 Meadow View	
REC01409	SC0004875	Aaa Solicitors		
REC01408	SC0004875	Aaa Solicitors		
REC01407	SC0004878	Andy Galazka	63 Monks Ave	
REC01406	SC0004869	Arnold Stevens	Windsor Street	
REC01405	SC0004869	Arnold Stevens	Windsor Street	
REC01403	SC0004869	Arnold Stevens	Windsor Street	

The **New Receipt** window opens.



## GENERAL FASTTAB

In this FastTab fill in vendor information and other receipt related details.

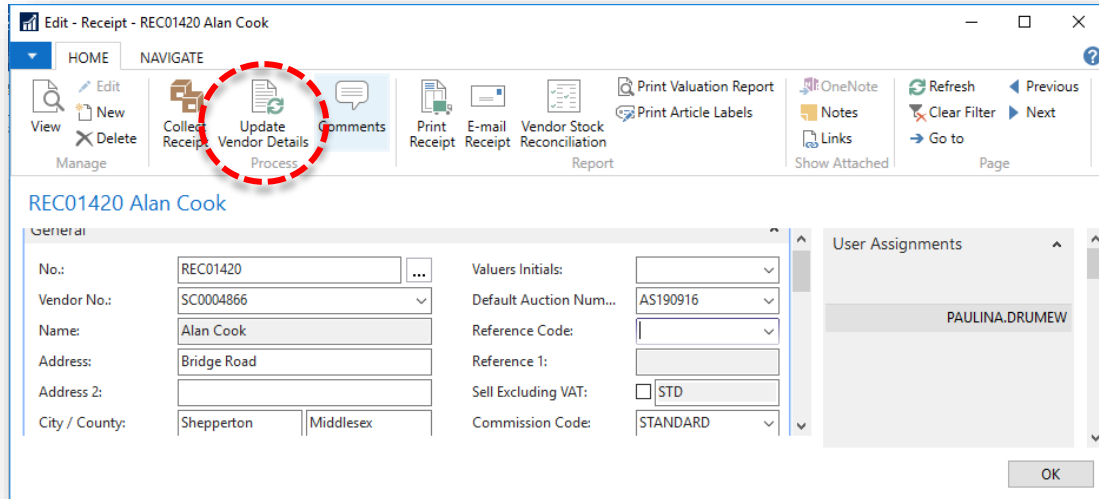
General			
No.:	REC01430	Valuers Initials:	
Vendor No.:	SC0004882	Default Auction Number:	AS060117
Name:	Duncan	Reference Code:	
Address:	4 Meadow View	Reference 1:	
Address 2:		Sell Excluding VAT:	<input type="checkbox"/> STD
City / County:	Chertsey Surrey	Commission Code:	STANDARD
Post Code / Country:	KT16 8GU	Specific Commission Rate:	0.00
Phone No.:	01932 000000	Insurance Rate:	1.50
Mobile No.:		Valuation Receipt:	<input type="checkbox"/>
E-mail:	paulina.drumew@evo-soft.co.uk	Goods Received:	<input checked="" type="checkbox"/>
		Documentation Signed:	<input checked="" type="checkbox"/>

Field name	Type	Description
No.	Unique ID	Unique number usually allocated from a number series. Move to next field to automatically generate the number.
Vendor No.	Lookup	To find a vendor, press on drop down arrow and set filter to relevant column to search.  Example: To search by surname, press on the <b>Surname</b> column and start typing vendor surname. Press on the line with the vendor details to bring his details to the Receipt.
Name		Populated when the <b>Vendor No.</b> selected.
Address		Populated when the <b>Vendor No.</b> selected.
City / County		Populated when the <b>Vendor No.</b> selected.
Post Code / Country		Populated when the <b>Vendor No.</b> selected.
Phone No.		Populated when the <b>Vendor No.</b> selected.
Mobile No.		Populated when the <b>Vendor No.</b> selected.

E-mail		Populated when the <b>Vendor No.</b> selected.
Valuers Initials	Lookup	Select originating valuer initials.
Default Auction Number	Lookup	<p>Select an auction if you want to assign all the items from this receipt to one auction.</p> <p>If auction selected, default auction number will come up when booking in new items on this receipt.</p> <p>Select an auction from the list or leave it blank to decide later.</p> <p>If you change default auction number after receipt is created, you will receive message: "Do you want to overwrite any existing Sales allocations?", select <b>Yes</b> to confirm changes, or <b>No</b> to do not apply changes to existing lines.</p>
Reference Code	Lookup	Select code to link this receipt with a Reference. That will mark all <b>Copies-To</b> assigned to this reference code to receive auction letters.
Reference 1	System field	Reference description, generated when the <b>Reference Code</b> selected.
Sell Excluding VAT	Tickbox + Lookup	<p>System dependent.</p> <p>Selected box usually indicates VAT on the top of hammer price, otherwise VAT included in hammer price.</p>
Commission Code	Lookup	Default commission code for the receipt from the vendor card.
Specific Commission Rate		Enter commission rate if different to default.
Insurance Rate		Enter insurance rate for the entries if applicable.
Valuation Receipt	Tickbox	<p>Select if receipt for valuation purpose.</p> <p>If selected, does not allow to <b>Clear</b> for sale.</p>
Goods Received	Tickbox	<p>Select if you received all the entries from vendor.</p> <p>If selected, new receipt lines will be automatically marked as received.</p>
Documentation Signed	Tickbox	Select if vendor signed valuation receipt.

**NOTE**

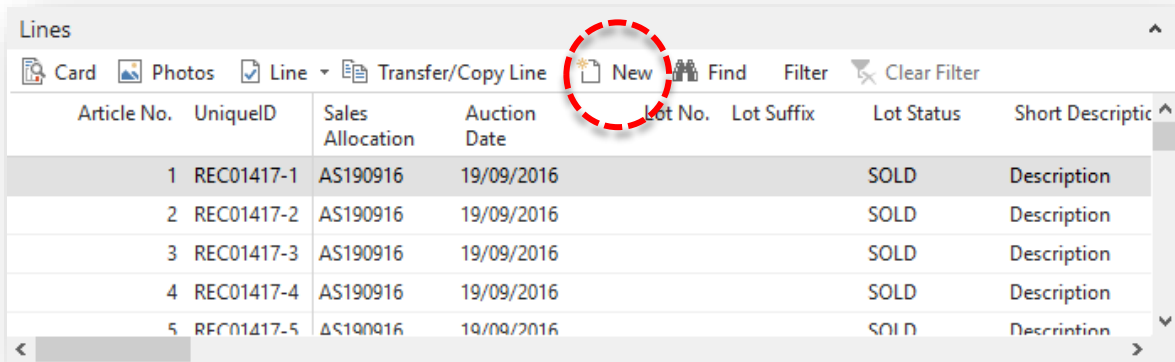
In this FastTab, you can overwrite vendors details if different. To bring back default vendors contact details select **Update Vendor Details** from the Ribbon.



**LINES FASTTAB**

In this FastTab, you can view a list of all the entries assigned to this receipt.

To create new line select **New** in the **Lines FastTab** menu, and then navigate to the first line to start editing. The optimal method of moving from field to field on the receipt line is by using the TAB Key. This highlights the contents of the next field ready to overtyping if necessary.



Article information can also be entered using the **Receipt Line Card** if preferred.

To open **Receipt Line Card**, select **Card**.

Article No.	UniquelD	Sales Allocation	Auction Date	Lot No.	Lot Suffix	Lot Status	Short Description
1	REC01417-1	AS190916	19/09/2016			SOLD	Description
2	REC01417-2	AS190916	19/09/2016			SOLD	Description
3	REC01417-3	AS190916	19/09/2016			SOLD	Description
4	REC01417-4	AS190916	19/09/2016			SOLD	Description
5	REC01417-5	AS190916	19/09/2016			SOLD	Description

The **Receipt Line Card** window opens.

REC01420-1

General

History

OK



## GENERAL FASTTAB

The screenshot shows the 'General' FASTTAB form with the following fields and values:

- Short Description: WWilliam IV silver te...
- Category No.: F02
- Sub Category No.:
- Low Estimate: 650.00
- High Estimate: 850.00
- Reserve Status: No Reserve
- Reserve Price: 600.00
- Sales Allocation: AS051016
- Illustration Cost: 0.00
- Lot No.: 0
- Lot Suffix:
- Lot Status: SOLD
- Valuers Initials:
- Valuers Comment:
- Withdraw Lot:
- Cleared For Sale:
- ARR:
- Unsold Article Action:
- No. Of Labels: 1
- Artist:

There are two Rich Text Editors on the right side of the form. The top one is titled 'Rich Text Editor' and has a toolbar with options like #1, #2, #3, #4, All, [chr], Save, and Case. The bottom one is also titled 'Rich Text Editor' and has a similar toolbar. Below the second Rich Text Editor, there are two labels: 'Catalogue Description' and 'Condition Report'.

Field name	Type	Description
UniqueID		Receipt Number is generated automatically and it is combination of Receipt No + Hyphen (-) + Article No.
Short Description		If left blank short description is automatically created from the <b>Catalogue Description</b> .
Category No.	Lookup	Select from the article category list. Used for statistical analysis.  NOTE: All items must have a category code associated with them.
Sub Category No.	Lookup	See above.
Low Estimate		Enter low estimate of the item.
High Estimate		Enter high estimate of the item. High Estimate must be equal to, or higher than <b>Low Estimate</b> .

Reserve Status	Lookup	<p>Select reserve status from available options:</p> <ul style="list-style-type: none"> <li>• Discretion - Sell at up to 10% less than the reserve, if deemed necessary by the Auctioneer.</li> <li>• Fixed - Not to be sold below stated Reserve Price.</li> <li>• No Reserve - Sell to the highest bidder regardless of estimate, without reserve.</li> <li>• Wide discretion - Sell at up to 30% less than the reserve, if deemed necessary by the auctioneer.</li> </ul>
Reserve Price		Enter reserve price. Must be equal to, or lower than <b>Low Estimate</b> .
Sales Allocation	Lookup	<p>If not assigned automatically from the receipt header, select an auction from the list. It is not required on this stage as item can be allocated to the auction later.</p> <p>NOTE: Leave it blank if receipt is created for a valuation purpose.</p>
Illustration Cost		Enter illustration charge per lot if different from the general settings.
Lot No.	Info	Information only. Displays allocated lot number from current auction.
Lot Status		Information only.
Valuers Initials	Lookup	Valuer initials are generated from the receipt general settings and you can amend it here if required.
Valuers Comment		Enter any important info about the item.
Withdrawn Lot	Tickbox	<p>Select to mark lot as withdrawn prior to the auction.</p> <p>In order to select the box a <b>Withdrawal Reason</b> must be entered in the dialog box that appears.</p>
Cleared for Sale	Tickbox	<p>Select if article is completed and ready for auction import.</p> <p>If cleared, the item will not be uploaded when you create the auction.</p>
ARR	Tickbox	Select to apply Artist Resale Right to the item.
Unsold Article Action	Lookup	<p>Select post sale action, if article fails to sell.</p> <p>This indicates what the next action will be by the Auction House.</p>

No. Of Labels		Enter number of labels to be printed for this lot. Example: set of chairs – each chair needs to be labelled as a part lot. Default value: 1
Catalogue Description		Enter full catalogue description of the item. Catalogue description will also overwrite the <b>Short Description</b> if already exist (setup dependant).
Condition Report		Enter condition report for the item.

### HISTORY FASTTAB

History ^

Sold: <input type="checkbox"/>	Catalogued Date: <input type="text"/>	
Hammer Price: <input type="text" value="0.00"/>	Catalogued By Inserting User: <input type="text"/>	
Sold On Date: <input type="text"/>	Sales History: <input type="text" value="0"/>	
Buyer No.: <input type="text"/>	Lot Lookup: <input type="text"/>	
Pre-Sales Advice Sent: <input type="text"/>	Auction Date: <input type="text"/>	
Catalogued By: <input type="text"/>	Receiving Date: <input type="text" value="28/09/2016"/>	
	Contact No.: <input type="text"/>	

Field name	Type	Description
Sold	System field	If selected, indicates that the lot it sold.
Hammer Price	Info	Once auction is mark as <b>Closed</b> , this field will update or remain £0.00 if unsold. Populated from the auction lines.
Sold On Date	Info	Invoice date, populated from the auction lines.
Buyer No.		Displays buyer number of successful bidder for sold article. Populated from the auction lines.
Pre-Sales Advice Sent	Info	Information when pre-sale advice letter was sent.
Catalogues By	Info	Information who catalogued the entry.
Catalogued Date	Info	Information when entry was catalogued.
Catalogued By Inserting User		Information who started cataloguing.
Sales History	Flowfield	Drilldown to display how many times the article has been in an auction and related auctions details.

Lot Lookup	Flowfield	Lot number will appear when article lotted up in an auction. Click on the number to view the auction line details.
Auction Date	Flowfield	Drilldown to view the auction details where the article was sold.
Receipting Date	Info	Date when the receipt was created.
Contact No.	Lookup	Displays contact card number related to the vendor.

### ADDITIONAL INFORMATION FASTTAB

**Additional Information** ^

Deceased Estate: <input type="checkbox"/>	VAT Registration No.: <input type="text"/>
Receipt Has Introductory Comm.: <input type="checkbox"/>	Originator: <input type="text" value="v"/>
Vendor Comments: <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	Contact No.: <span style="color: blue;">C0004866</span>

Field name	Type	Description
Deceased Estate	Tickbox	Select if receipt for deceased estate.
Receipt Has Introductory Comm.	Tickbox	When you create new receipt for vendor with Introductory Commission Payee assigned, you will receive warning message stating: "This Vendor has an Introductory Commission Payee assigned should Introductory Commission be paid for this receipt?". Select <b>Yes</b> to confirm, or <b>No</b> to cancel. If you confirm, this field will be selected.
Vendor Comments		Enter vendor's comments if required.
VAT Registration No.	Info	VAT number is populated from the vendor card.
Originator	Info	Originator is populated from the vendor card.
Contact No.	Flowfield	Displays contact card number related to the vendor.

Select **OK** to save new receipt and close the window.

