# EVO-AUCTION USER GUIDE

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# 1.1 VALUATION

Probate and insurances invoices need to be raised in the system, when a valuer has completed a probate or insurance valuation for a client. All clients who have used these valuation services must be created in the system as a vendor and as a buyer for invoicing.

Manually generated invoices are also used for postage and packing services.

## CREATE VALUATION RECEIPT

To create a valuation receipt:

1.  Create **Vendor Card** for person/ company who requested a valuation service.
    If the person/ company is already on the system as a vendor, do not set them up again. If you are creating a new vendor card, proceed as normal.

2.  Create new **Receipt** for the vendor, and mark as a valuation receipt, by selecting check box in the **Valuation Receipt** field on the **General FastTab**.

| NOTE |
| --- |
| Selected **Valuation Receipt** field does not allow to **Clear for Sale**.<br><br>Do not select **Default Auction Number** for a valuation receipt so items are not transferred to an auction by mistake. |

3. Navigate to the **Lines FastTab** and create valuation line for each article.

## PRINT VALUATION RECEIPT

To print a valuation receipt:

1. Open a receipt and select **Print Valuation Report** from the Ribbon.

2. The **Valuation Report** window opens.
   Select a **Receipt No.** if different from current, and then select the **Print** button or the **Preview** button.
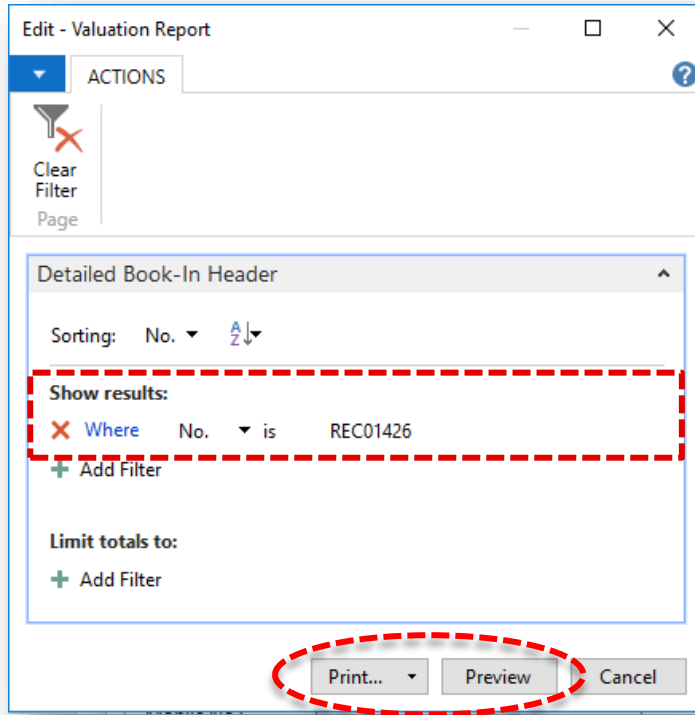
| NOTE |
| --- |
| |

To save the valuation report, click on arrow on the **Print** button and then select a format.

A valuation report example:



**Valuation Report for Receipt REC01426**

Pauline Duncan
4 Meadow View
KT16 8GU Chertsey
Surrey

A well executed charcoal portrait of Percy Grainger,
pianist and composer (1882-1961), signed by the artist
"To my friend Percy Grainger

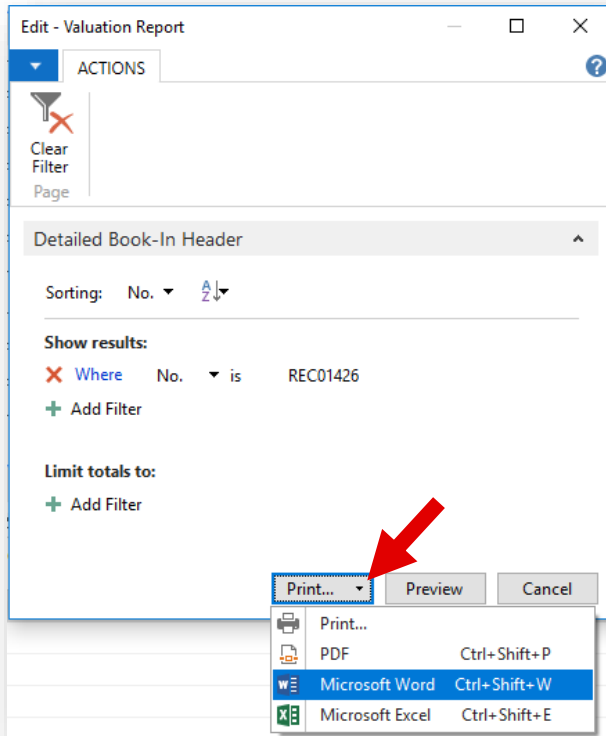A well executed charcoal portrait of Percy Grainger,                    80 - 120
pianist and composer (1882-1961), signed by the artist
"To my friend Percy Grainger

**Totals per Category**

**VAL**                                                  **80 - 120**

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## CREATE VALUATION INVOICE

Before you create a valuation invoice, check if the vendor is registered as a buyer.

If the vendor does not exist as a buyer, you will need to set them up as one.

To create a valuation invoice:

1. In the Search box enter **Sales Invoices**, and then choose the related link.

2. The **Sales Invoices** page opens.
   Select **New** from the Ribbon and fill in all required information.
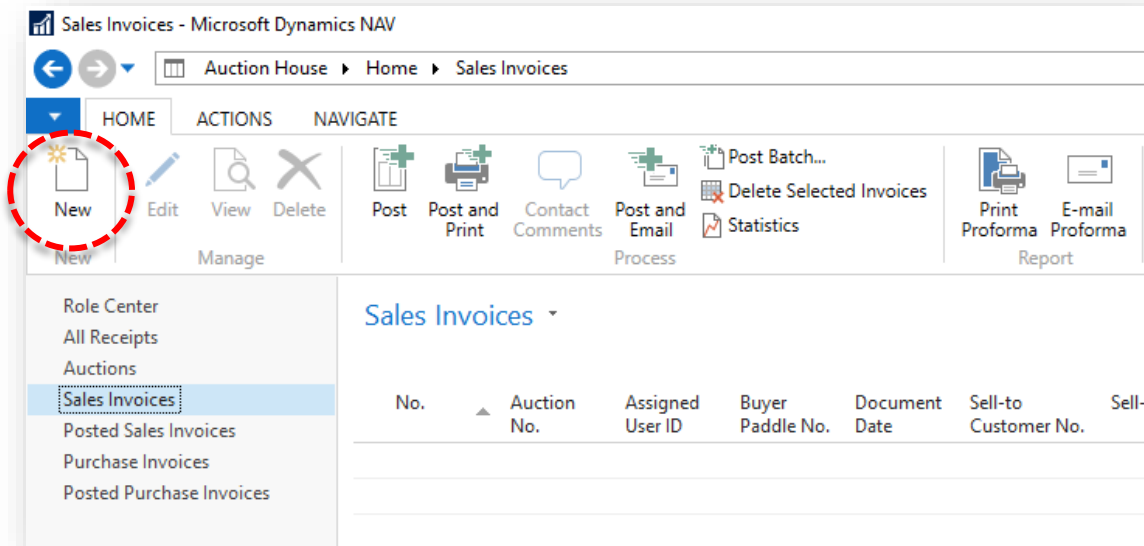


3. Navigate to the **General FastTab**, select the **Valuation Invoice** field, and then select the buyer number in the **Sell-to Customer No.** field.
   Edit the **Posting Description** field if required.
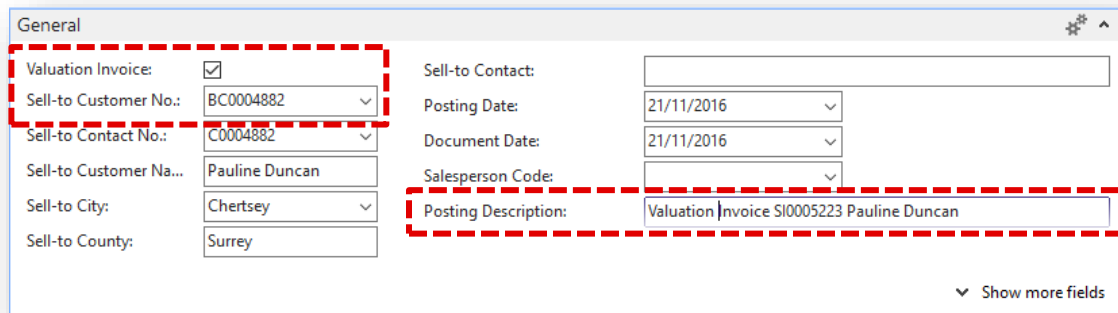
4. Navigate to the **Lines FastTab,** and then create new invoice line by filling in all required information.



| Field name | Type | Description |
|---|---|---|
| Type | Dropdown | Select G/L Account. |
| No. | Lookup | Select valuation account number. |
| Description | | Automatically filled in when **No.** selected. |
| Quantity | | Enter number (1). |
| Unit Price Excl. VAT | | Enter the valuation price excluding VAT. |

Now the invoice line for the valuation service is created, and the amount to be paid is generated on the **Mixed Payment Method FastTab**.



5. To register payment for the valuation invoice, proceed as normal. Navigate to the **Mixed Payment Method FastTab,** select a **Payment Method** and an **Amount**, and then select **Post** or **Post and Print** located on the Ribbon.