



EVO-AUCTION USER GUIDE

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1.1 VENDOR CARD

You must create a vendor as a contact first, and then a Vendor Template is used to create a vendor from the contact. This sequence is maintained because the contact card is key for marketing and other CRM functions.

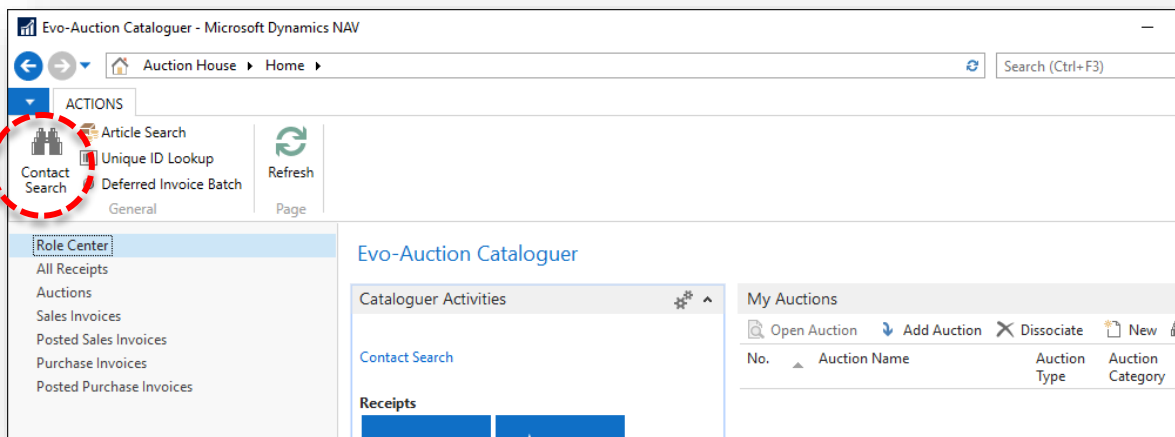
Information on a contact card and related vendor card are synchronised. Any changes to mutual fields, such as name and address or phone number, made on one of these cards are replicated on the other. In this way, Evo-auction only maintains one set of communication data.

REGISTER NEW SELLER

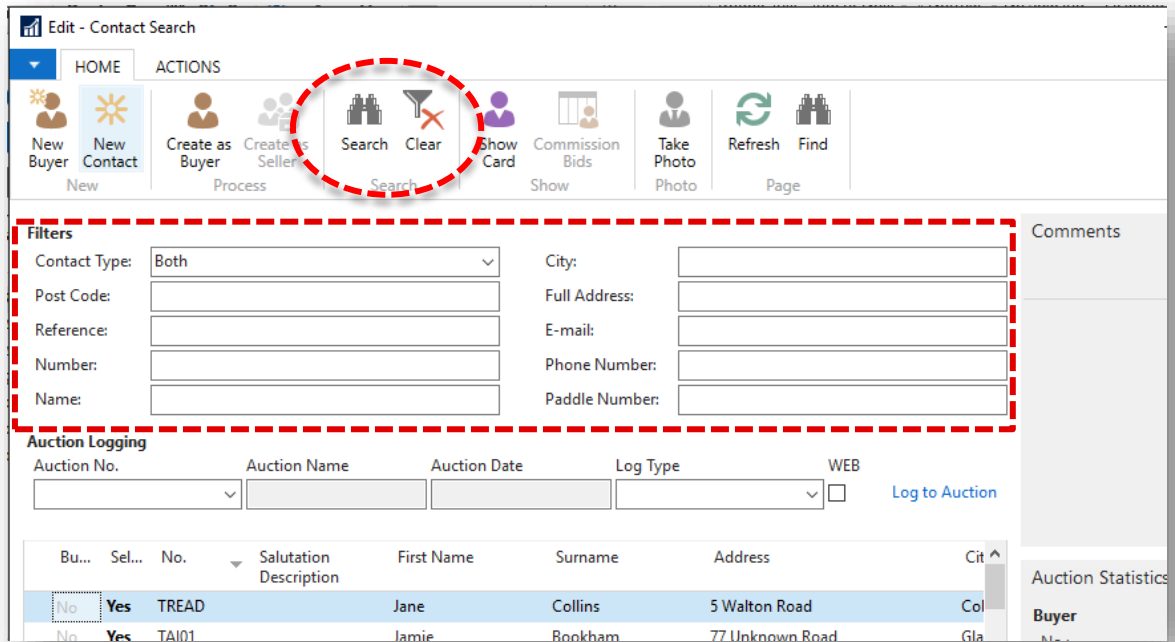
Before you register new vendor it is a good practice to check if person/company already exist on the system to avoid duplication.

To check if a contact already exist:

1. Navigate to the **Contact Search** page.



2. To search for a contact, go to the **Filters** pane. You can search by filling in any information such as telephone number, postcode, surname and so on.
3. Select **Search** from the Ribbon.
To cancel search/filter and bring all the contacts list back, select **Clear** from the Ribbon.



NOTE

If a contact is registered as a buyer, you will see **Yes** in the **Buyer** column.
 If a contact is registered as a vendor, you will see **Yes** in the **Seller** column.
 If a contact is registered as a vendor and a buyer, you will see **Yes** in both columns.

Buyer	Seller	No.	Salutation Description	First Name	Surname	Ac
No	No	C0004888		Sdda		
Yes	Yes	C0004886	Ms	Monika	Fakhoury	12
No	No	C0004885	Mr	John	Smith	31
Yes	No	C0004883	Miss	Anna	Streeter	1 P
Yes	Yes	C0004882	Miss	Pauline	Duncan	4 M
Yes	Yes	C0004881	Mr	Edward	Corn	8 M
Yes	No	C0004880	Ms	Ma...	De...	7 A

If the contact not found, create new **Contact Card**.

If the contact already exist, create new **Vendor Card** for selected contact.

To create new **Vendor Card**:

1. Navigate to the **Contact Search** page and then select a line with the contact.
2. Select **Create as Seller** from the Ribbon.

Filters

Contact Type: Both
 Post Code:
 Reference:
 Number:
 Name:

City:
 Full Address:
 E-mail:
 Phone Number:
 Paddle Number:

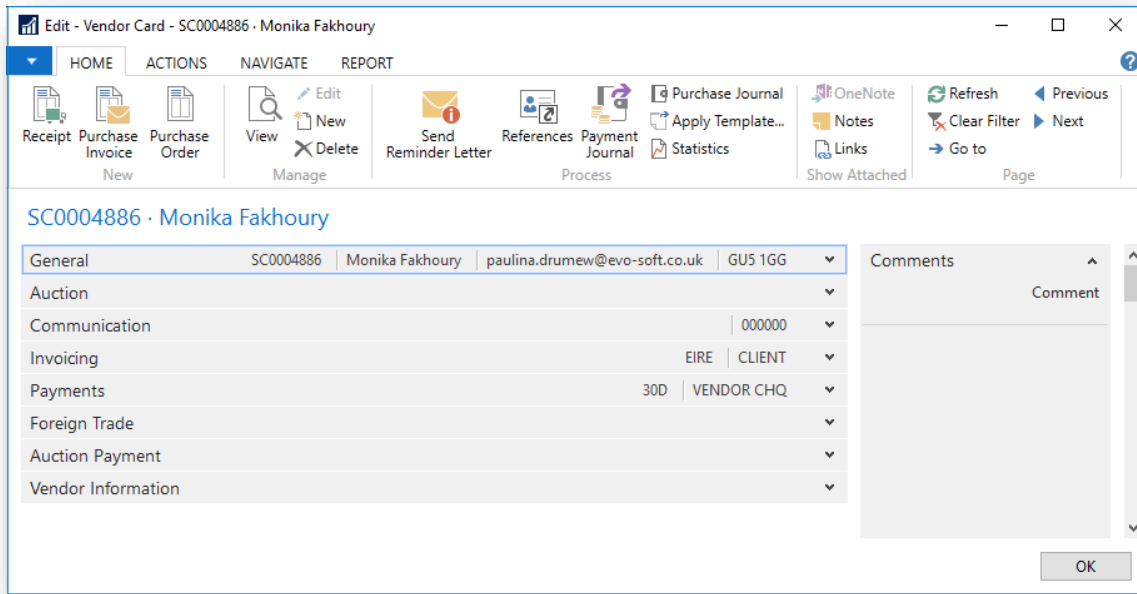
Auction Logging

Auction No. Auction Name Auction Date Log Type WEB
 [Log to Auction](#)

Bu...	Sel...	No.	Salutation Description	First Name	Surname	Address	City
Yes	No	C0004883	Miss	Anna	Streeter	1 Pound Road	Ab
Yes	Yes	C0004882	Pauline	Dunne	Downey	4 Meadow View	Ch
No	No	C0004881		Edward	Corn	8 Middlesex Street	Bir
Yes	No	C0004880	Mark	Proctor	Proctor	7A Patriot Drive	M
Yes	No	C0004879		Alison	Morgan	3 Green Lane	Lo

The **Vendor Card** window opens.

Some fields are optional, so you need to refer to your company's internal procedures to determine what information is required at input stage.



GENERAL FASTTAB

Details in the **General FastTab** are dynamically generated from the related contact card.

General	
No.:	SC0004881
Name:	Edward Corn
Name Details:	Salutation Co... First Name Middle Name Surname Edward Corn
Address:	8 Middlesex Street
Address 2:	
City:	Birmingham
County:	West Midlands
Country/Region Code:	
Phone No.:	
Mobile No.:	
E-Mail:	paulina.drumew...
Post Code:	B10
Balance (LCY):	0.00
Blocked:	
Last Date Modified:	03/10/2016

Field name	Type	Description
No.	Unique ID	Unique number, usually allocated from a number series.
Name		Generated from the contact card.
Name Details		Generated from the contact card.
Address		Generated from the contact card.
City	Lookup	Generated from the contact card.

County		Generated from the contact card.
Country/Region Code	Lookup	Generated from the contact card. Used when dealing with foreign vendors.
Phone No.		Generated from the contact card.
Mobile No.		Generated from the contact card.
E-Mail		Generated from the contact card.
Post Code	Lookup	Generated from the contact card.
Balance (LCY)	Flowfield	Total amount owed to this vendor in local currency. From this field you can drill down to see the vendor ledger entries that make up this value.
Blocked	Dropdown	To block the vendor, select from available options: <ul style="list-style-type: none"> • Payment - allows no further transactions for this vendor • All – vendor is blocked on the system for any actions • Advisory • Deceased • Duplicate – select this option if contact is duplicated
Last Date Modified	System field	Stamped field showing last modification date.

AUCTION FASTTAB

This FastTab is showing auction information for the vendor.

Auction

Originator: <input type="text"/>	Pay-To Vendor Name:
Auction Vendor: <input checked="" type="checkbox"/>	Related Contact: C0004882
Staff Vendor: <input type="checkbox"/>	Buyer No.: <input type="text" value="BC0004882"/> ...
Standard Vendor: <input type="checkbox"/>	How did you hear about us: <input type="text"/>
Pay-to Vendor No.: <input type="text"/>	Other: <input type="text"/>

Field name	Type	Description
Originator	Lookup	Select the vendor originator.
Auction Vendor	Tickbox	Selected by default as we are registering contact as an auction vendor.

Staff Vendor	Tickbox	Select to mark the vendor as staff.
Standard Vendor	Tickbox	Select to mark the vendor as a supplier, example: Mailboxes, ATG.
Pay-to Vendor No.	Lookup	Use if different to current vendor to access the Vendor List. If selected, option to overwrite the Address fields and the Auction Payment details.
Pay to Vendor Name	Info	Populated from Pay-to Vendor No. field.
Related Contact	Flowfield	From this field you can drill down to the Contact Business Relations.
Buyer No.	Lookup	From this field you can drill down to the Buyer Business Relations.
How did you hear about us		Marketing tool. Type the vendors answer. Synchronised with related Buyer Card.
Other		Enter comments.

COMMUNICATION FASTTAB

Complete all fields where information is known, if not already dynamically completed. The fields are self-explanatory.

Communication ^

Purchaser Code: <input style="width: 100%;" type="text"/>	Phone No.: <input style="width: 100%;" type="text" value="01932 000000"/>
Contact: <input style="width: 100%;" type="text"/>	Fax No.: <input style="width: 100%;" type="text"/>
Primary Contact No.: <input style="width: 100%;" type="text"/>	Home Page: <input style="width: 100%;" type="text"/>
Search Name: <input style="width: 100%;" type="text" value="PAULINE DUNCAN"/>	Contact No.: C0004882

Field name	Type	Description
Purchaser Code	Lookup	Used if a particular person in your team is assigned to deal with this vendor.
Contact		Enter primary contact name if different from current. It will create new contact card and you will be ask if you want to update Pay-to vendor details. Automatically filled in when the Primary Contact No. selected
Primary Contact No.	Lookup	This field shows you a drop down list of all contacts associated with this vendor. The Contact field will be completed once primary contact number is filled in.

Search Name		Search name is the name by which you will search for this vendor. Generated from the Name field on the General FastTab and synchronised with related buyer card.
Phone No.		Synchronised with the General FastTab on related contact and buyer card.
Fax No.		Synchronised with the General FastTab on related contact and buyer card.
Home Page		Synchronised with the General FastTab on related contact and buyer card.
Contact No.	Flowfield	Related contact number. Click on the number to navigate to the Contact Business Relations list.

INVOICING FASTTAB

In this FastTab, fields are completed automatically, using default setting from a template.

Apply changes if required.

The **General Bus. Posting Group** field, the **General VAT Posting Group** field and the **Vendor Posting Group** field are all accounting functions, which have been set up so that transactions post into the correct accounts.

The screenshot shows the 'Invoicing' FastTab with the following fields and values:

- Pay-to Vendor No.: [Empty dropdown]
- Gen. Bus. Posting Group: EIRE
- VAT Bus. Posting Group: STD
- Vendor Posting Group: CLIENT
- Prices Including VAT:
- Dealer Margin Scheme:
- Consolidate Auction Documents:

Field name	Type	Description
Pay-to Vendor No.	Lookup	Use if different to current vendor.
Gen. Bus. Posting Group	Lookup	Specifies an account where the vendor's transactions are posted. Default group applied.
VAT Bus. Posting Group	Lookup	Specifies VAT %, the VAT calculation type, and the VAT accounts that the vendor's transactions are posted. The options are the same as for the Gen. Bus. Posting Group. Dynamically generated when the Gen. Bus. Posting Group field is completed.
Vendor Posting Group	Lookup	Specifies which general ledger accounts, transactions involving this vendor are posted to.

		Default group applied.
Prices Including VAT	Tickbox	This field controls whether sales lines will show prices including or excluding VAT.
Dealer Margin Scheme	Tickbox	If selected, indicates vendor operating the Dealer Margin Scheme. Selected by default.
Consolidate Auction Documents	Tickbox	If selected, allows you to create vendor documents from multiple auctions marked as consolidated. Selected by default.

PAYMENTS FASTTAB

In this FastTab, you can view/define how payments to the vendor are managed.

Payments ^

Application Method: <input type="text" value="Manual"/>	Priority: <input type="text" value="0"/>
Partner Type: <input type="text"/>	Our Account No.: <input type="text"/>
Payment Terms Code: <input type="text" value="30D"/>	Chq Payee Name: <input type="text"/>
Payment Method Code: <input type="text" value="VENDOR CHQ"/>	Preferred Bank Account: <input type="text"/>
BACS Account No.: <input type="text"/>	

Field name	Type	Description
Application Method	Dropdown	This field specifies how the program will apply entries for this vendor. <ul style="list-style-type: none"> Manual - payments are only applied if you specify a document (default value) Apply to Oldest - If you do not specify a document for the payment to be applied to, payments are applied to the oldest of the vendor's open entries
Partner Type	Dropdown	Available options: <ul style="list-style-type: none"> Company Person
Payment Terms Code	Lookup	Usually a formula that calculates the due date, payment discount date and payment discount %. When you register an invoice for the vendor, the program will enter appropriate Payment Terms. Default value - 30 Days.

Payment Method Code	Lookup	Used to indicate the Payment Method for the vendor. Default value – VENDOR CHQ.
BACS Account No.	Lookup	Used to enter the vendor bank account, which will be use if the Suggest Vendor Payments batch run with the BACS option selected.
Priority		Priority field can be use if you have only a limited amount available for payments. Defines a level of priority when making payments. Priority 1 is the highest priority, Priority 2 is second highest, 0 is No Priority. Default value – 0.
Our Account No.		Used to specify account number the vendor uses to relate to your account with them.
Chq Payee Name		Payee name is use, if you are printing cheques.
Preferred Bank Account	Lookup	Vendor's bank account number for BACS.

FOREIGN TRADE FASTTAB

This FastTab is in use only if contact is foreign to produce invoices if different currency.
Synchronised with the Foreign Trade FastTab on related contact and buyer card.

Foreign Trade ^

Currency Code: VAT Registration No.:

Language Code:

Field name	Type	Description
Currency Code	Lookup	Always fill out the currency if you are not using local currency.
Language Code	Lookup	Language Code is needed only if you are producing foreign language documents. Select code to apply translation. Synchronised with the Communication FastTab on related contact and buyer card.
VAT Registration No.		VAT number for European vendor.

AUCTION PAYMENT FASTTAB

Auction Payment

Introductory Comm Payee:	<input type="text"/>	Commission Code:	STANDARD
Introduction Comm Type:	Vendor Comm %	Never Charge Commission:	<input type="checkbox"/>
Intro. General Comm %:	0.00	Never Charge Unsold:	<input type="checkbox"/>
Intro Specialist Comm %:	0.00	Never Charge Lotting on W/Drn:	<input type="checkbox"/>
Pref. General Comm. %:	0.00	Never Charge Illustration:	<input type="checkbox"/>
Pref. Specialist Comm. %:	0.00	Never Charge Minimum Comm.:	<input type="checkbox"/>
Sell Items Excluding VAT:	<input type="checkbox"/>	Never Charge Insurance:	<input type="checkbox"/>
Lotting Fee:	0.00	Never Charge VAT:	<input type="checkbox"/>
Charge Lotting Fee:	<input type="checkbox"/>	Never Charge Withdrawn:	<input type="checkbox"/>
Basic Unsold:	<input type="checkbox"/>	Never Charge Lotting on Sold:	<input type="checkbox"/>
No Unsolds on Statement:	<input type="checkbox"/>	Marketing Fee Type:	None
Trade:	<input type="checkbox"/>	Marketing Fee:	0.00
		Marketing Charge:	Standard

Field name	Type	Description
Introductory Comm Payee	Lookup	Used to link to existing vendor who introduced them.
Introduction Comm Type	Dropdown	Select introductory commission type from the list: <ul style="list-style-type: none"> Vendor Comm % (Default value) Hammer %
Intro. General Comm %		Introduction commission % on General Sales.
Intro Specialist Comm %		Introduction commission % on Specialist Sales.
Pref. General Comm %		Commission % given to preferential customers on General Sales.
Pref. Specialist Comm %		Commission % given to preferential customers on Specialist Sales.
Sell Items Excluding VAT	Tickbox	If selected, VAT charge is calculated on the top of hammer price, otherwise VAT included in hammer price.
Lotting Fee		Lotting fee charge per lot.
Charge Lotting Fee	Tickbox	If selected, indicates lotting fee on all vendor's entries.
Basic Unsold	Tickbox	System dependant.
No Unsolds on Statement	Tickbox	If selected, excludes unsolds from vendor's statements.
Trade	Tickbox	Used for segmentation purpose.

Commission Code	Lookup	Default commission automatically applied. It can be overwritten on a receipt when special arrangement.
Never Charge Commission	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged any commission.
Never Charge Unsold	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged for unsold articles.
Never Charge Lotting on W/Drn	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged lotting fee on withdrawn articles.
Never Charge Illustration	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged any illustration fee.
Never Charge Minimum Comm.	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged the minimum vendor invoice commission value.
Never Charge Insurance	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged Standard Insurance %.
Never Charge VAT	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged VAT (Usually for staff vendors).
Never Charge Withdrawn	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged fee on withdrawn items.
Never Charge Lotting on Sold	Tickbox	Activated when default Commission Code not applied. If selected, the vendor should not be charged lotting fee on sold articles.
Marketing Fee Type	Dropdown	Activated when default Commission Code not applied. Available options: <ul style="list-style-type: none"> • None (Default value) • Discretionary

		<ul style="list-style-type: none"> • Mandatory
Marketing Fee		Activated when default Commission Code not applied.
Marketing Charge	Lookup	Available options: <ul style="list-style-type: none"> • None • Standard (Default value) • Trade

NOTE

It is useful to know the order of precedence of the Commission settings.
The following order is listed, so that the higher the number, the higher the precedence:

- Never Charge Commission indicator takes total precedence and overrides any other setting
- Item Specific Commission Rate on Detailed Book In
- Vendor card – Preferential General % and Preferential Specialist %
- First Setup – Default (Auction settings)

VENDOR INFORMATION FASTTAB

Informational only. Shows a detailed breakdown of vendor’s sales entries.

Vendor Information ^

No. Of Receipts:	0	Used As Pay-To Vendor:	0	
No. Of Auction Articles:	0	Vendor Comments:	<input style="width: 100%;" type="text"/>	
No. Of Items Sold:	0	Last Date Modified:	<input style="width: 100%;" type="text" value="03/10/2016"/>	
No. Of Items Unsold:	0	Hold Invoices:	<input type="checkbox"/>	
Total Gross Sales:	0.00			

Field name	Type	Description
No. Of Receipts	Flowfield	Number of receipts registered for the vendor. Click on the number to view a list of all assigned receipts.

No. Of Auction Articles	Flowfield	Number of auctions' lots. Click on the number to view all the auctions' lines assigned to this vendor.
No. Of Items Sold	Flowfield	Number of sold lots. Click on the number to view detailed list.
No. Of Items Unsold	Flowfield	Number of unsold lots. Click on the number to view detailed list.
Total Gross Sales	Flowfield	Total hammer price of sold lots before any deductions. Click on the number to view a list of entries that make up this value.
Used As Pay-To Vendor	Flowfield	Used if this vendor takes payment for another vendor.
Vendor Comments		Used to record any special vendor's instructions or comments.
Last Date Modified	System Field	Stamped field showing last date modified.
Hold Invoices	Tickbox	If selected, this vendor is not included when Suggest Vendor Payments process run.

Select **OK** to save and close the vendor card.

