



EVO-AUCTION USER GUIDE

PUBLISHED DATE: 16.02.2017

PUBLISHED BY:

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1.1 BUYER CARD

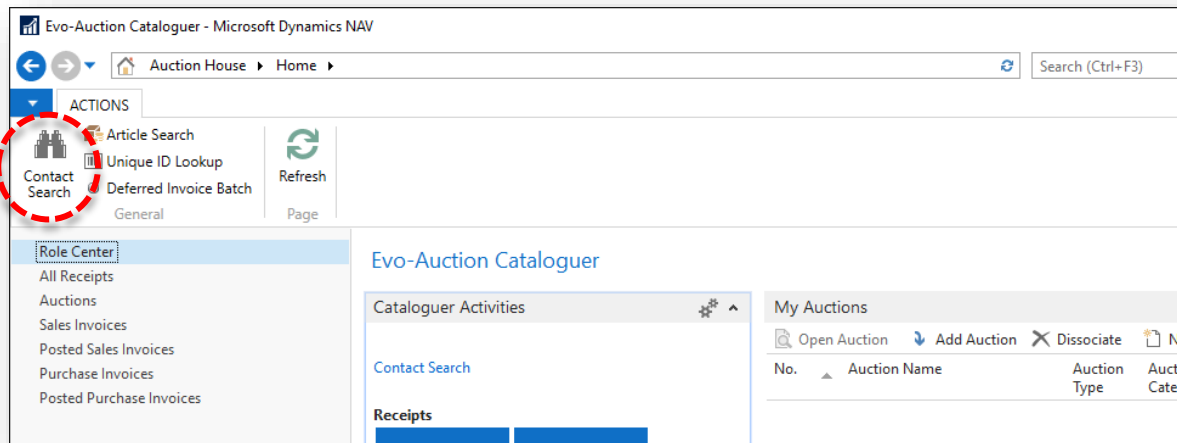
You must create a buyer (Customer) as a contact first, and then a Customer Template is used to create a customer from the contact. This sequence is maintained because the contact card is key for marketing and other CRM functions.

Information on a contact card and related customer 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 BUYER

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

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.

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](#)

Buyer	Seller	No.	Salutation Description	First Name	Surname	Address	City
No	Yes	TREAD		Jane	Collins	5 Walton Road	Col
No	Yes	TAI01		Jamie	Bookham	77 Unknown Road	Gla

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 **Customer Card** for selected contact.

To create new **Customer Card**:

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

Filters

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

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

Auction Logging

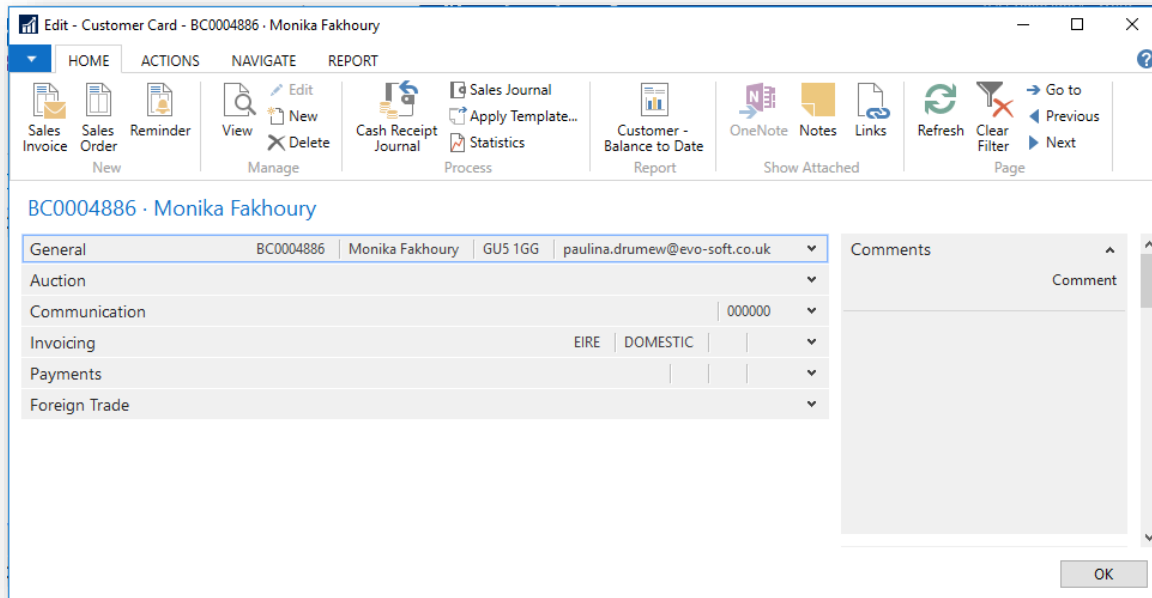
Auction No.	Auction Name	Auction Date	Log Type	WEB
				<input type="checkbox"/>

[Log to Auction](#)

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

The **Customer 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.:	BC0004886
Name:	Monika Fakhoury
Name Details:	Salutation Code: MS, First Name: Monika, Middle Name:
Address:	12 Pine Court
Address 2:	
City:	Guildford
County:	Surrey
Post Code:	GU5 1GG
Country/Region Code:	
Phone No.:	000000
Mobile No.:	111111
E-Mail:	paulina.drumew@evo-soft...
Balance (LCY):	0.00
Blocked:	
Last Date Modified:	06/10/2016

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.

Post Code	Lookup	Generated from the contact card.
Country/Region Code	Lookup	Generated from the contact card. Used when dealing with foreign buyer.
Phone No.		Generated from the contact card.
Mobile No.		Generated from the contact card.
E-Mail		Generated from the contact card.
Balance (LCY)	Flowfield	Total amount owed by the buyer in local currency. From this field you can drill down to see the customer ledger entries that make up this value.
Blocked	Dropdown	Synchronised with the contact card. To block the buyer, select from available options: <ul style="list-style-type: none"> • Buyer - block the buyer for any transactions. You would normally block all if you no longer want to deal with this buyer • Seller - block the vendor for any transactions. You would normally block all if you no longer want to use this vendor • All – contact is blocked for any actions • Advisory • Deceased • Duplicate – select this option if contact is duplicated
Last Date Modified	Info	Stamped field showing last date modified.

AUCTION FASTTAB

This FastTab is showing auction information for the buyer.

Auction ^

<p>Web Buyer: <input type="checkbox"/></p> <p>Charge Web Premium: <input type="checkbox"/></p> <p>Private/Trade: <input style="width: 100%;" type="text" value="Private"/></p> <p>Do not Email Results: <input type="checkbox"/></p> <p>Requires Hard Copy of Inv: <input type="checkbox"/></p> <p>How did you hear about us: <input style="width: 100%;" type="text"/></p>	<p>Other: <input style="width: 100%;" type="text"/></p> <p>Total Spend Value: 0.00</p> <p>No. Of Auctions Attended: 0</p> <p>No. Of Lots Purchased: 0</p> <p>Permanent Buyer: <input type="checkbox"/></p> <p>Buyer Paddle No.: <input style="width: 100%;" type="text"/></p> <p>Preferential Telephone Buyer: <input type="checkbox"/></p>
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Field name	Type	Description
Web Buyer	Tickbox	If selected, the buyer is marked as Web Buyer across all the auctions.
Charge Web Premium	Tickbox	If selected, web charge apply to all successful bids.
Private/Trade	Dropdown	Available options: <ul style="list-style-type: none"> • Private (Default value) • Trade
Do not Email Results	Tickbox	If selected, the buyer is excluded when Web Invoices populated.
Requires Hard Copy of Inv	Tickbox	If selected, the buyer is included when you run Batch Print Invoices.
How did you hear about us		Marketing tool. Type buyer's answer. Synchronised with the vendor card.
Other		Enter comments.
Total Spend Value	Flowfield	Total hammer price for the buyer. From this field you can drill down to see auction lines that make up this value.
No. Of Auctions Attended	Flowfield	Number of auctions the buyer is registered to. From this field you can drill down to see a list of the auctions.
No. Of Lots Purchased	Flowfield	Number of purchased lots. From this field you can drill down to see auctions' lines that make up this value.
Permanent Buyer	Tickbox	View only. If selected, the buyer has a permanent paddle number assigned. To assign a Permanent Paddle number, go to the General FastTab on related contact card.
Buyer Paddle No.		View only. To assign a Permanent Paddle number, go to the General FastTab on related contact card.
Preferential Telephone Buyer	Tickbox	If selected, indicates priority telephone bidder when multiple telephone bidders for a lot.

COMMUNICATION FASTTAB

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

Communication ^

Salesperson Code:	<input type="text"/>	Phone No.:	<input type="text" value="01932 000000"/>
Search Name:	<input type="text" value="PAULINE DUNCAN"/>	Fax No.:	<input type="text"/>
Primary Contact No.:	<input type="text" value="C0004898"/>	Home Page:	<input type="text"/>
Contact:	<input type="text" value="gjhghjg"/>		

Field name	Type	Description
Salesperson Code	Lookup	Synchronised with the Communication FastTab on related contact card. Select a code from the list.
Search Name		Search name is the name by which you will search for this buyer. Generated from the Name field on the General FastTab and synchronised with related vendor card.
Primary Contact No.	Lookup	This field shows you a drop down list of all contacts associated with this buyer. The Contact field will completed once primary contact number is filled in.
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
Phone No.		Synchronised with related contact and vendor card.
Fax No.		Synchronised with related contact and vendor card.
Home Page		Synchronised with related contact and vendor card.

INVOICING FASTTAB

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

Apply changes if required.

The **Gen. Bus. Posting Group** field, the **VAT Bus. Posting Group** field and the **Customer 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:

- Credit Limit (LCY): 0.00
- Bill-to Customer No.: (empty dropdown)
- Invoice Copies: 0
- Copy Sell-to Addr. to Qte From: Person
- Gen. Bus. Posting Group: EIRE
- VAT Bus. Posting Group: STD
- Customer Posting Group: DOMESTIC

Field name	Type	Description
Credit Limit (LCY)		Credit limit for the buyer. If the buyer purchase above the limit, warning message shown on an auction results input.
Bill-to Customer No.	Lookup	Use if billing customer different to current buyer.
Invoice Copies		Enter number of copies you wish to print. This are additional copies. 0 means 1 copy printed, 1 means 2 copies printed.
Copy Sell-to Addr. To Qte From	Dropdown	Available options: <ul style="list-style-type: none"> Company (Default value) Person
Gen. Bus. Posting Group	Lookup	Specifies the ledger entry accounts where the buyer's transactions are posted. Default group applied.
VAT Bus. Posting Group	Lookup	The options are the same as for the Gen. Bus. Posting Group. Dynamically generated when the Gen. Bus. Posting Group field is completed.
Customer Posting Group	Lookup	Specifies which general ledge accounts transactions involving this buyer are posted. Default group applied.

PAYMENTS FASTTAB

In this FastTab, you can view/define how payments from the buyer are managed.

Payments

Application Method: <input type="text" value="Manual"/>	Fin. Charge Terms Code: <input type="text" value="10 LATE"/>
Partner Type: <input type="text"/>	Print Statements: <input type="checkbox"/>
Payment Terms Code: <input type="text" value="7D"/>	Last Statement No.: <input type="text" value="0"/>
Payment Method Code: <input type="text"/>	Never Charge Premium: <input type="checkbox"/>
Reminder Terms Code: <input type="text" value="LATE 5"/>	Pref. General Prem. %: <input type="text" value="0.00"/>
	Pref. Specialist Prem. %: <input type="text" value="0.00"/>

Field name	Type	Description
Application Method	Dropdown	This field specifies how to apply payments from this buyer. <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, payments are applied to the oldest of the customer's open entries.
Partner Type	Dropdown	Available options: <ul style="list-style-type: none"> Company Person
Payment Terms Code	Lookup	This is mandatory field and determines the due date for buyer's invoices. Normally 7 Days.
Payment Method Code	Lookup	Specifies the payment method that the buyer usually use to submit payment.
Reminder Terms Code	Lookup	Specifies the terms for reminders.
Fin. Charge Terms Code	Lookup	Specifies the terms that will be used to calculate finance charges.
Print Statements	Tickbox	If selected, indicates to include this buyer when you print statements.
Last Statement No.		Last statement number for this buyer.
Never Charge Premium	Tickbox	If selected, indicate that the buyer should not be charged any Buyers Premium.
Pref. General Prem. %		Preferential buyer premium for this buyer for General Auctions if different from default.
Pref. Specialist Prem. %		Preferential buyer premium for this buyer for Specialist Auctions if different from default.

FOREIGN TRADE FASTTAB

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

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 vendor card and the Communication FastTab on related contact card.
VAT Registration No.		VAT number is optional.

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

Edit - Customer Card - BC0004886 - Monika Fakhoury

HOME ACTIONS NAVIGATE REPORT

Sales Invoice Sales Order Reminder View Edit New Delete Cash Receipt Journal Sales Journal Apply Template... Customer - Balance to Date OneNote Refresh Previous Notes Clear Filter Next Links Go to Page

BC0004886 · Monika Fakhoury

General	BC0004886	Monika Fakhoury	GU5 1GG	paulina.drumew@evo-soft.co.uk	▼	Comments Comment
Auction	▼					
Communication	000000 ▼					
Invoicing	EIRE DOMESTIC ▼					
Payments	▼					
Foreign Trade	▼					

OK