



EVO-AUCTION USER GUIDE

PUBLISHED DATE: 31.10.2017

PUBLISHED BY:

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

Tel. 01793 677 633
info@evo-soft.co.uk
www.evo-soft.co.uk

TABLE OF CONTENTS

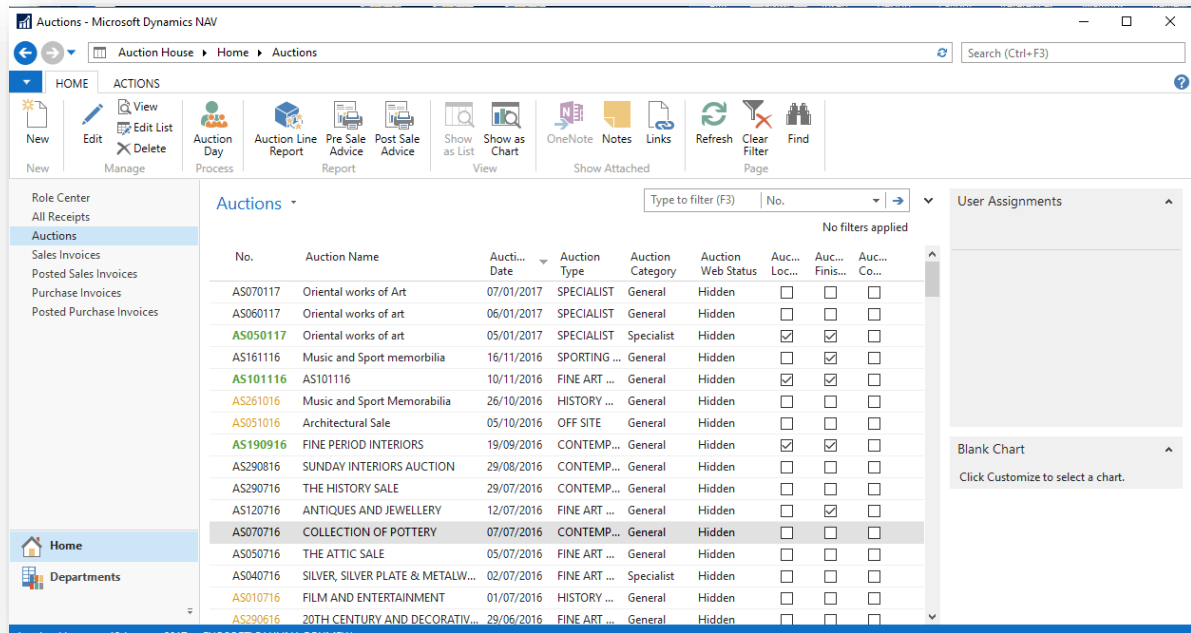
1.1 AUCTION	3
SETTING UP NEW AUCTION	3
AUCTION DETAILS FASTTAB	5
LINES FASTTAB	7
INVOICING & SHIPPING FASTTAB.....	8
CREATING AN AUCTION	8
ALLOCATED LINES.....	9
IMPORTING LINES FROM RECEIPTS	10
IMPORTING ADDITIONAL LOTS	13
ERRORS	14
LOTTING UP	16
MISSING LOTS CHECK	24
LOCKING THE LOT NUMBERS	25

1.1 AUCTION

SETTING UP NEW AUCTION

To create new auction:

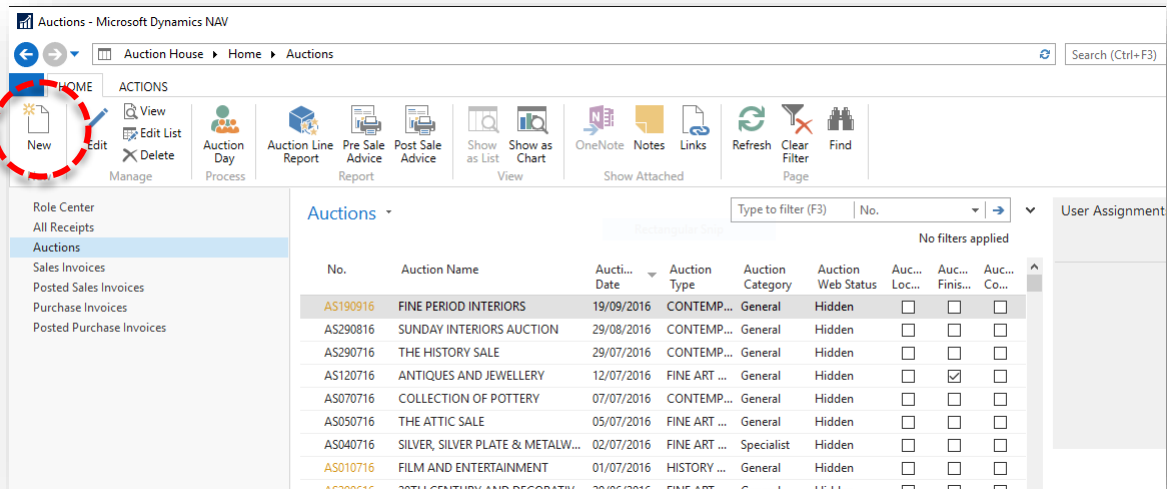
1. In the Search box enter **Auctions**, and then choose the related link.
The **Auctions** window opens.



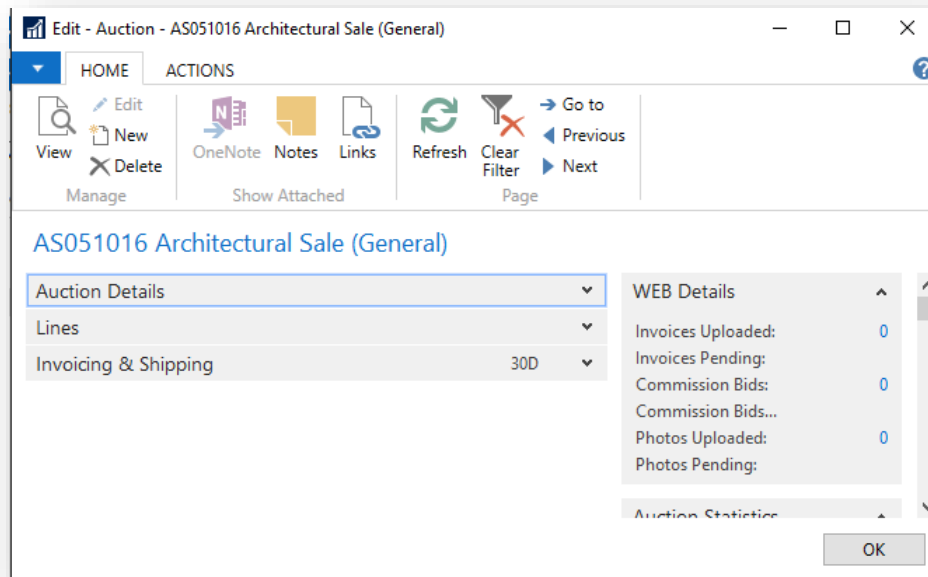
NOTE

Auction highlighted in **Green** colour is currently locked (in process of lotting).
Auction highlighted in **Orange** colour indicate past auction, which should be closed.

2. Select **New** from the Ribbon.



3. The **Auction** window opens. Fill in required information.



AUCTION DETAILS FASTTAB

Auction Details	
No.:	3119
Auction Name:	IMPORTANT IRISH ART
Auction Date:	02/12/2015
Auction Time:	18:00:00
Auction Category:	General
Auction Type:	IRISH ART
Auction Location No.:	
Viewing Days And Times:	Sunday 29th Nov 2:00pm - 5:00pm, Monday 30th Nov
Auction Close Date:	
Auction Locked:	<input checked="" type="checkbox"/>
Auction Finished:	<input checked="" type="checkbox"/>
Auction Complete:	<input type="checkbox"/>
Auction Web Status:	Publish
Email Auction Results:	<input checked="" type="checkbox"/>

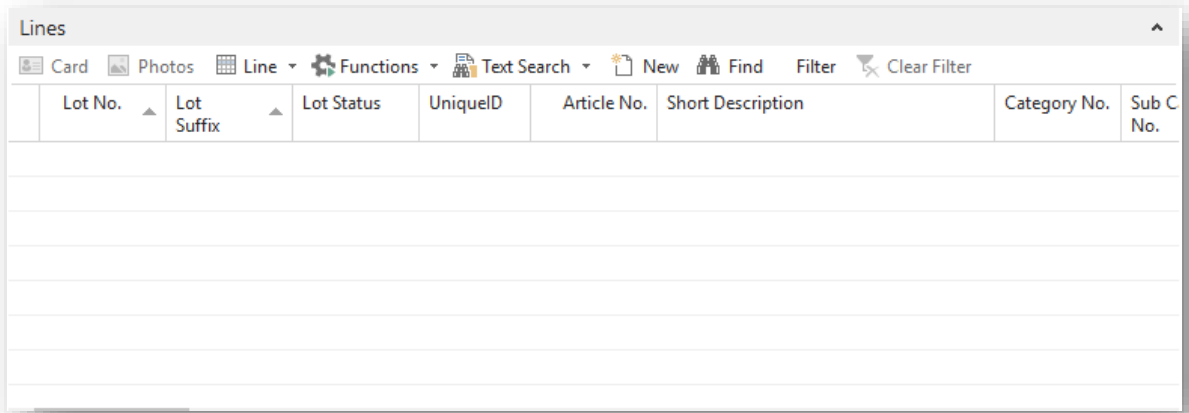
Field name	Type	Description
No.	Unique Code	Usually automatically assign from a number series. Press the Enter key to obtain the next number in the series, or input the reference you wish to allocate to that specific auction.
Auction Name		Title of the auction.
Auction Date	Lookup	Auction start date.
Auction Time		Auction start time (24-hour format) HH:MM:SS
Auction Category	Lookup	Specify auction category: <ul style="list-style-type: none"> • General - default • Specialist
Auction Type	Lookup	Select auction type. Auction type defines default WEB Premium , default Payment Term Code and default Vendor Commission .
Auction Location No.	Lookup	Used for multi-site Auction House to specify where the auction is taking place.
Viewing Days And Times	Auto	Date formula is populated from the Auction Category table.
Auction Close Date	Lookup	Used for catalogue production deadline. Once the articles are Lotted and Locked, any entries after that date cannot be entered and included in the auction. Currently no function behind.
Auction Locked	System Field	Indicates if the auction is Locked .

		Locking an Auction checks for errors on the Auction Lines. For more info go to Locking the Lot Numbers .
Auction Finished	Tickbox	Indicates if the auction is Finished and auction results are ready to be Published. Activated when the auction is Locked .
Auction Complete	System Field	This field indicates if the auction is Complete . Auction should be marked as complete when all statements are Posted, unsolds lots have been processed and no further corrections to be applied to the auction lines. No function behind.
Auction Web Status	Dropdown	Used for website integration. Available options: <ul style="list-style-type: none"> • Unpublish – auction is listed but catalogue or preview not visible to public. • Preview – auction is listed with preview of selected lots, used for advertising single lots in forthcoming auctions. • Publish – auction is listed and full catalogue available to public. • Hidden – auction is not visible in auction list on the catalogue page, this option is useful for private sales (Default value).
Email Auction Results	Tickbox	Select the check box to publish unpaid invoices online, and email results to successful buyers with link to pay online. Before you select the checkbox, make sure all the auction results are correct. Activated only if auction is marked as Finished .

LINES FASTTAB

This FastTab displays list of all assigned articles.

Go to [Creating an Auction](#) to find out how to import assigned Receipt lines.



The screenshot shows a software interface window titled "Lines". At the top, there is a toolbar with icons for "Card", "Photos", "Line", "Functions", "Text Search", "New", "Find", "Filter", and "Clear Filter". Below the toolbar is a table with the following columns: "Lot No.", "Lot Suffix", "Lot Status", "UniqueID", "Article No.", "Short Description", "Category No.", and "Sub C No.". The table body is currently empty, showing several blank rows.

Lot No.	Lot Suffix	Lot Status	UniqueID	Article No.	Short Description	Category No.	Sub C No.

INVOICING & SHIPPING FASTTAB

Invoicing & Shipping ^

Consolidated Auction Code: Euro Rate:

Field name	Type	Description
Consolidated Auction Code	Unique ID	<p>Create unique ID to mark all consolidated auctions. Good practice is to use first day auction number as an identifier.</p> <p>When you run 3-day auction and each day is created as a separate auction, you can consolidate all 3 auctions, which will allow you to:</p> <ul style="list-style-type: none"> • Use the same Buyer Paddle Number across multiple auctions, which means that a buyer needs to register to one auction only to be able to take a part in other consolidated auctions. • Create a vendor statement across multiple auctions. • Create a Pre and a Post Sale Advice letter across multiple auctions. • Create a buyer invoice across multiple auctions. • Create an Auction Notice letter across multiple auctions.
Euro Rate		Enter Euro rate for currency conversion. This rate is required if ARR apply to lots in the auction.

4. Select **OK** to save the auction.

CREATING AN AUCTION

Create Auction is the process of bringing all allocated articles to selected auction from vendors' receipts, lotting up (creating sales Lines) and generating reports associated with them.

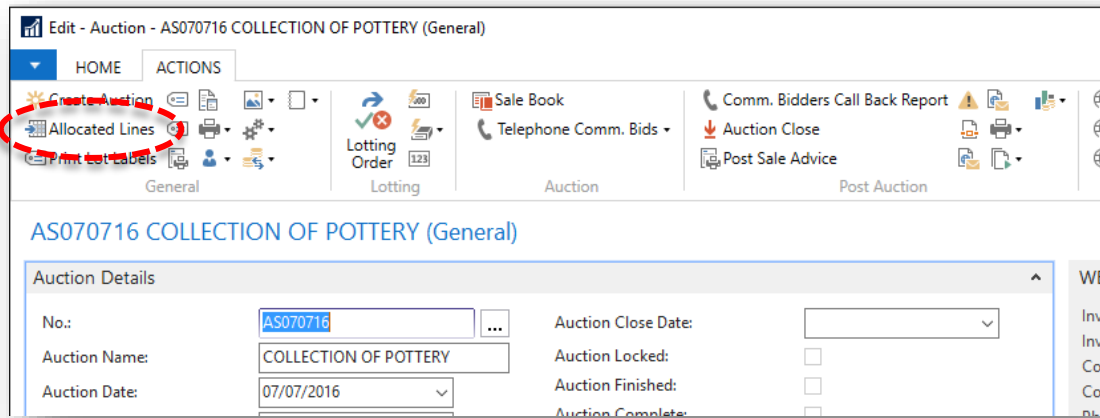
Sales lines can be added to (updated) repeatedly until the auction is **Locked** after lotting up the auction, and it is good practice to update them on a regular basis.

ALLOCATED LINES

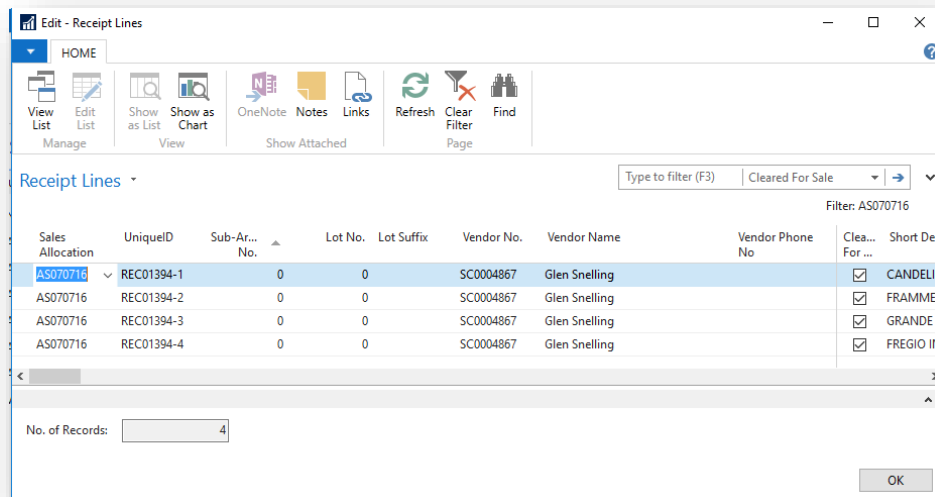
Before you start the import, you must check if receipts' lines allocated to the auction are correct and completed.

To run the check:

1. Open the auction and then select **Allocated Lines** from the Ribbon.



The **Receipt Lines** window opens.



2. Check if all the lines are correct and complete.

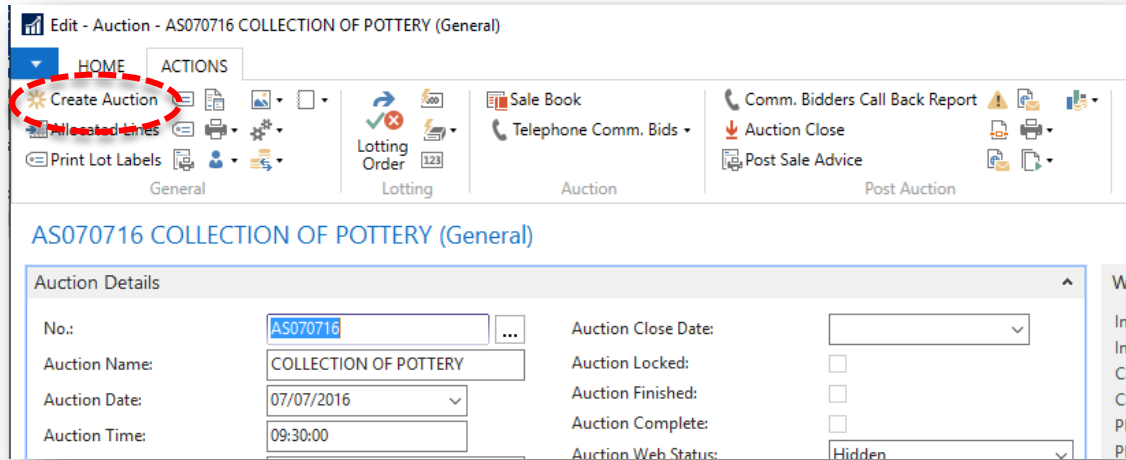
NOTE

Receipt lines must be marked as **Cleared for Auction** to be imported.

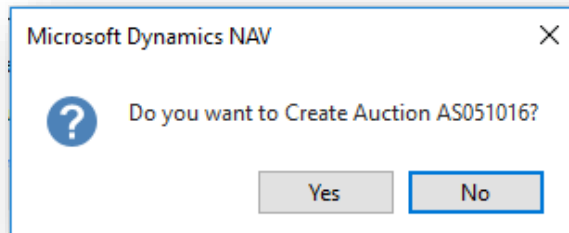
IMPORTING LINES FROM RECEIPTS

To import receipt lines:

1. Select **Create Auction** from the Ribbon.
This action will import all previously allocated Receipts' Lines to the auction.



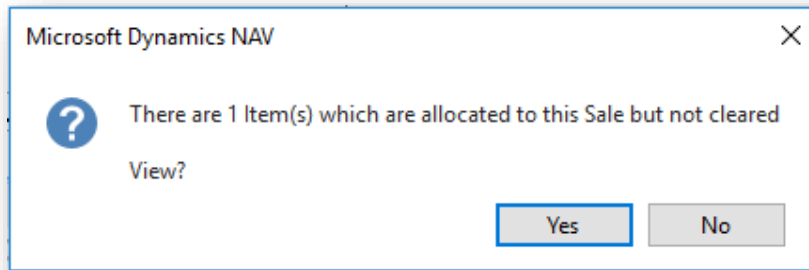
2. Select **Yes** to confirm.



NOTE

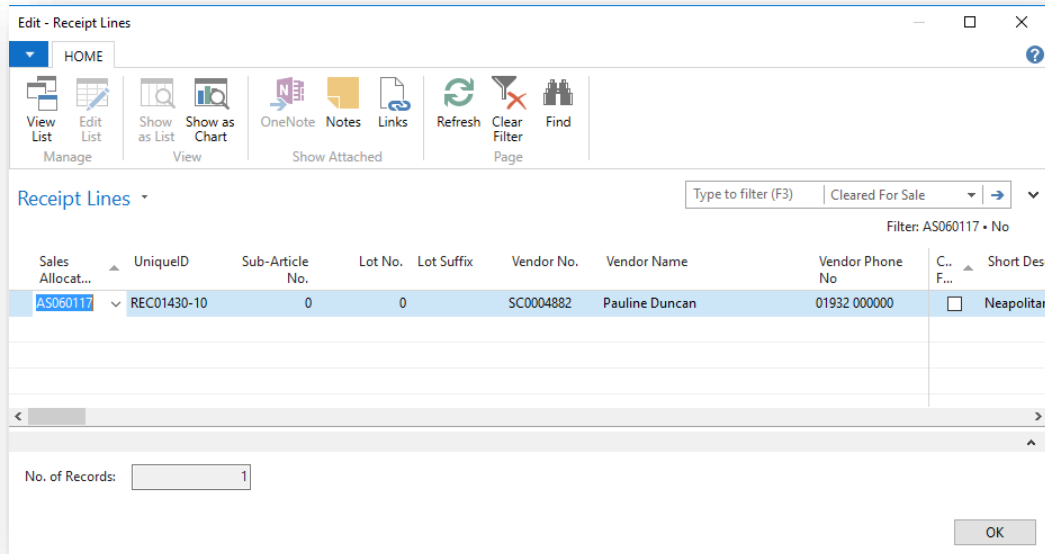
On this stage, you may receive message stating: "There are (1) Items which are allocated to this Sale but not cleared. View?"

Select **Yes** to view a list of allocated, but not Cleared Lines.

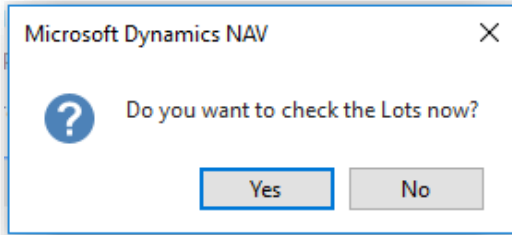


To import lines from this list, you must mark them as cleared.

Select **OK** to save changes and close the window.



3. Select **Yes** to continue



All the lots are now imported and visible in the **Lines FastTab**.

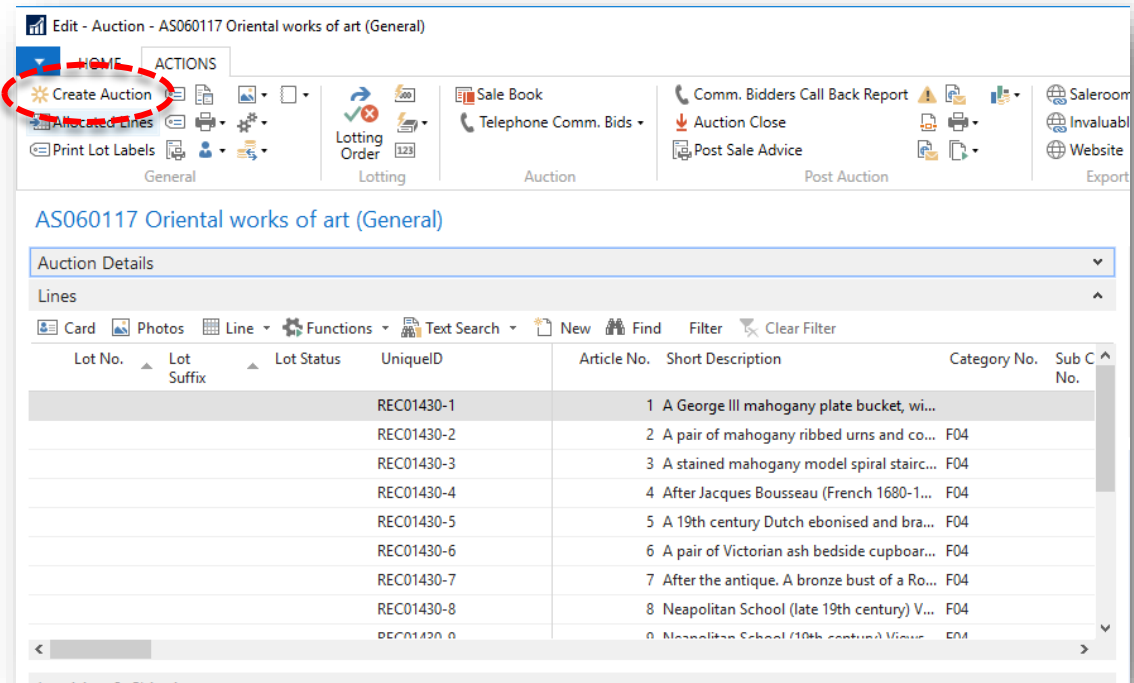
A screenshot of the 'Lines' FastTab in Microsoft Dynamics NAV. The table displays a list of imported lots with the following columns: Lot No., Lot Suffix, Lot Status, UniqueID, Article No., Short Description, Category No., Sub Category No., Loc..., ARR, Tran..., and Reserve. The first row is highlighted in blue.

Lot No.	Lot Suffix	Lot Status	UniqueID	Article No.	Short Description	Category No.	Sub Category No.	Loc...	ARR	Tran...	Reserve
			REC01430-1	1	A George III mahogany plate bucket, wi...			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-2	2	A pair of mahogany ribbed urns and co...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-3	3	A stained mahogany model spiral stairc...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-4	4	After Jacques Bousseau (French 1680-1...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-5	5	A 19th century Dutch ebonised and bra...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-6	6	A pair of Victorian ash bedside cupboar...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-7	7	After the antique. A bronze bust of a Ro...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-8	8	Neapolitan School (late 19th century) V...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01430-9	9	Neapolitan School (19th century) Views...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2,0
			REC01430-10	10	Neapolitan School (19th century) Vesuv...	F04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01431-1	1	Neapolitan School (19th century) Vesuv...	F02		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			REC01431-2	2	A painted metal coat of arms for the to...	F02		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

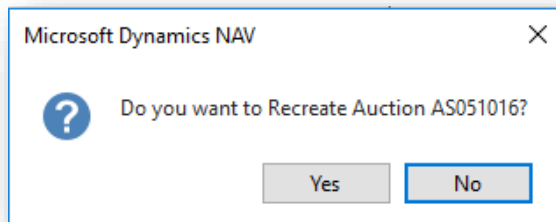
IMPORTING ADDITIONAL LOTS

To add more lots to the auction:

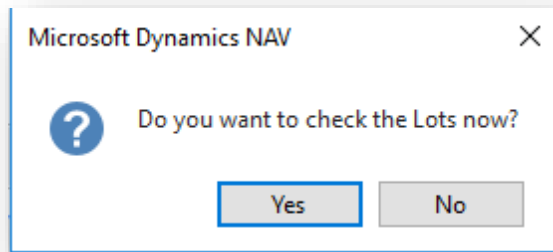
1. Open the auction and then select **Create Auction** from the Ribbon.



2. Select **Yes** to confirm.



3. Select **Yes** to confirm.



ERRORS

To check for missing key information on the auction lines:

1. Open the auction and then navigate to the **Qty of Errors** column, where you can see a number of errors for individual line. That means the lines are either incomplete or incorrect.

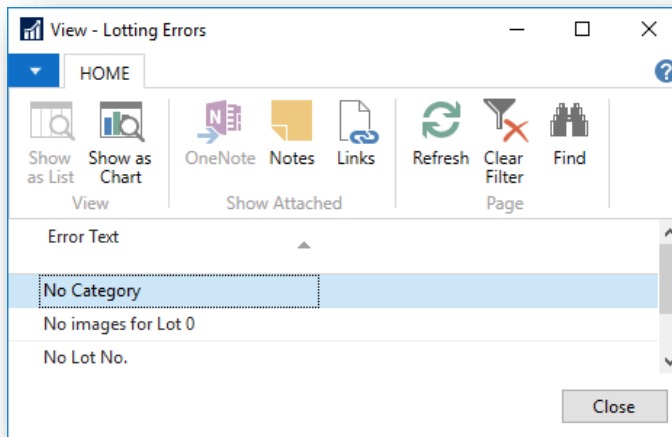
List of the common causes of errors:

- Category or subcategory field is blank.
- No image assigned.
- No lot number assigned.
- Article has no detailed description.
- Reserve status is set as discretion with no reserve price.
- No low or high estimate.
- Article is not catalogued (The catalogued check box is not selected). This can be selected manually.

A screenshot of the 'Lines' table in Microsoft Dynamics NAV. The table has columns for Lot No., Lot Status, UniqueID, Qty of Errors, Short Description, Category No., and Sub Category No. A red dashed box highlights the 'Qty of Errors' column. The first row (Lot No. 1) has a value of 3, while all other rows (Lot No. 2-9) have a value of 2.

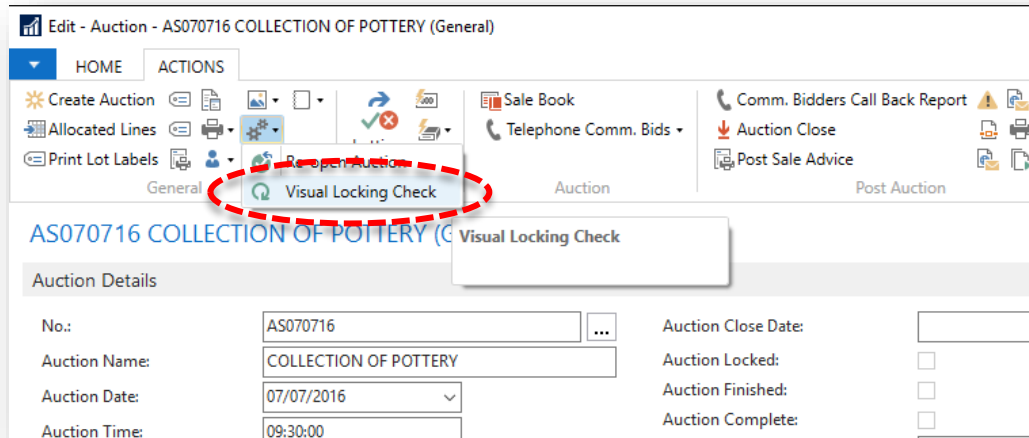
Lot No.	Lot Status	UniqueID	Qty of Errors	Short Description	Category No.	Sub Category No.
1		REC01430-1	3	A George III mahogany plate bucket, wi...		
2		REC01430-2	2	A pair of mahogany ribbed urns and co...	F04	
3		REC01430-3	2	A stained mahogany model spiral stairc...	F04	
4		REC01430-4	2	After Jacques Bousseau (French 1680-1...	F04	
5		REC01430-5	2	A 19th century Dutch ebonised and bra...	F04	
6		REC01430-6	2	A pair of Victorian ash bedside cupboar...	F04	
7		REC01430-7	2	After the antique. A bronze bust of a Ro...	F04	
8		REC01430-8	2	Neapolitan School (late 19th century) V...	F04	
9		REC01430-9	2	Neapolitan School (19th century) Views...	F04	

- Click on the error number to view detailed information. It will open up new window with list of errors for selected lot.



NOTE

Errors are not updated automatically, so to update all the error numbers you must select **Visual Locking Check** from the Ribbon.



To make necessary amendments to the articles, you must do so from within the auction lines by highlighting the article and selecting **Functions/ Goto Receipt** from the menu. This will open up relevant receipt.

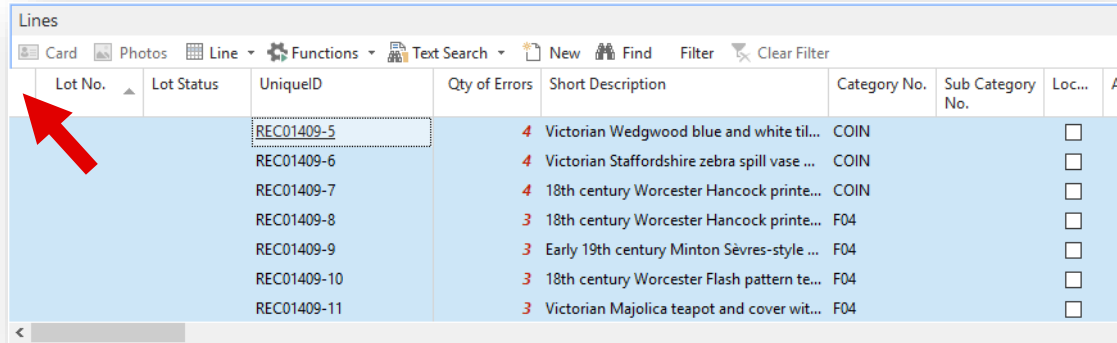
Once you have cleared the visual locking errors, you can proceed with lotting up.

LOTING UP

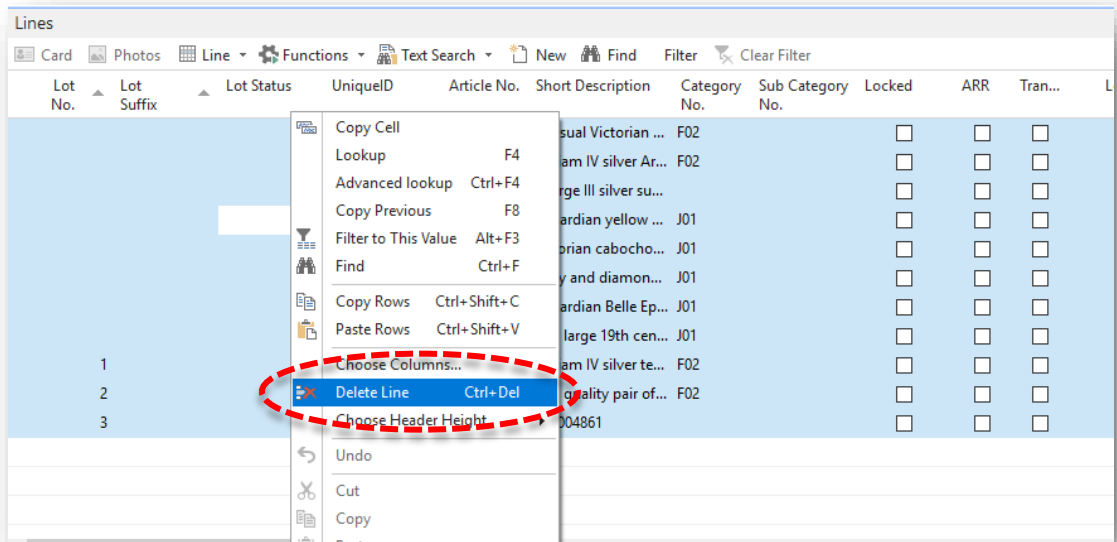
It is advised to delete all the auction lines from the sale immediately before lotting, and then bring them back in (Create Auction). This process allows any amendments that have been made in the receipts to update in the sale lines prior to lotting.

To delete all auction lines:

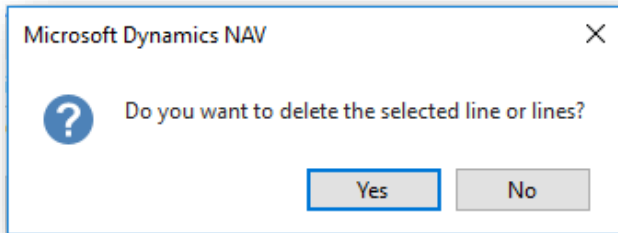
1. Select all the lines, by clicking on the white square next to the columns' titles; alternatively press Ctrl+A key.



2. Right click on selected lines, and then choose **Delete Line**.



3. Select **Yes** to confirm.



All auction lines are now removed.

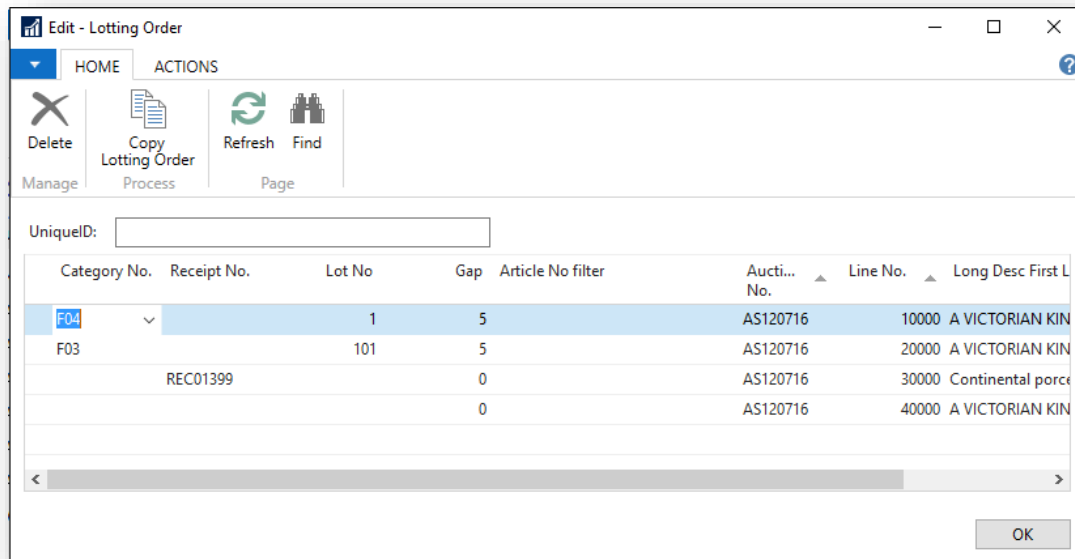
LOTING ORDER

This is function, where you define rules for lotting up. There are several different options for lotting order available and you need to select the one, which best fits your requirements.

- Lotting order by category
- Start category/section with specific lot number
- Gap size between categories
- Setting individual lot or receipt in specific order
- Lotting order can also be imported from previous auction.

To access the Lotting Order page:

1. Open the Auction and then select **Lotting Order** from the Ribbon.



Example:

Set particular article (receipt line) as lot number 1, followed by lots assigned to category F02, with gap size of 5 spare lots after each category. Additionally, start category J01 with lot number 1001.

UniquelD:

Category No.	Receipt No.	Lot No	Gap	Article No filter	Auction No.	Line No.
		1	0	REC01420-10	AS051016	10000
F02			5		AS051016	20000
J01		1001	5		AS051016	30000

OK

To set up **Lotting Order by Category:**

1. Navigate to new line and in the **Category No.** column select a category.

UniquelD:

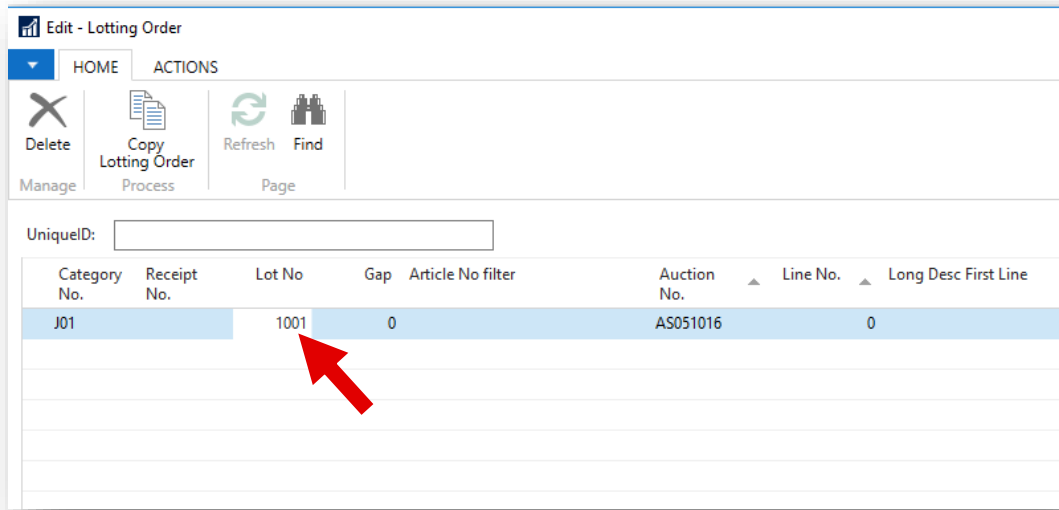
Category No.	Receipt No.	Lot No	Gap	Article No filter	Auction No.	Line No.
F02			0		AS051016	

No.	Description
B01	Books
COIN	Coins
COLL	For Collection
F01	Fine Art Pictures
F02	Fine Art Silver
F03	Fine Art Silver Plate
F04	Fine Art Furniture

New Advanced Set as default filter column

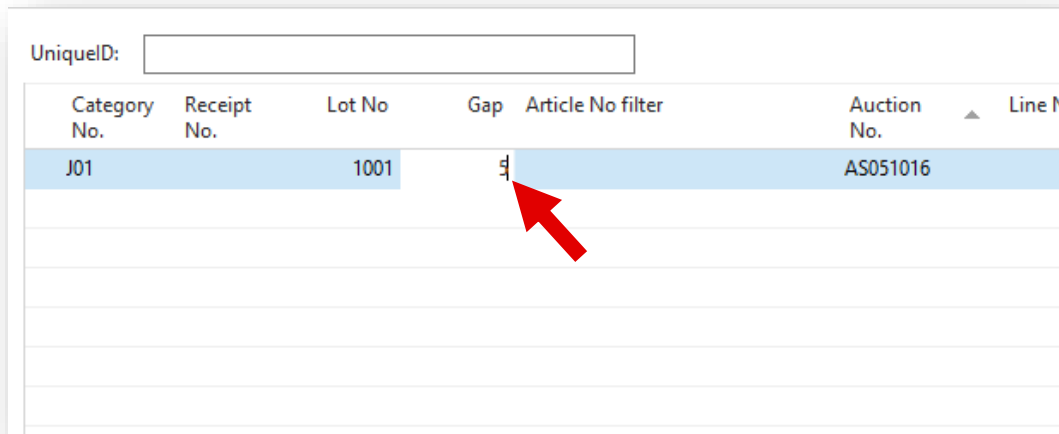
To start Category/Section with specific Lot Number:

1. Navigate to the line with selected Category and in the **Lot No.** column enter the lot number.



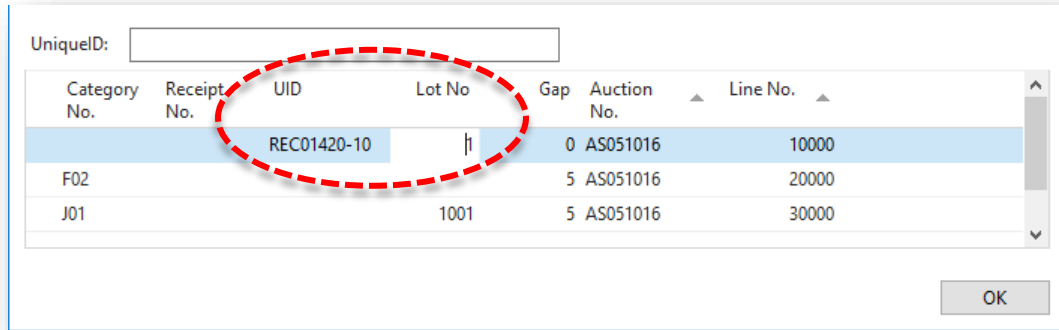
To set a Gap Size at the end of Category:

1. Navigate to the line with selected Category and in the **Gap** column enter number of spare lots to follow this category.



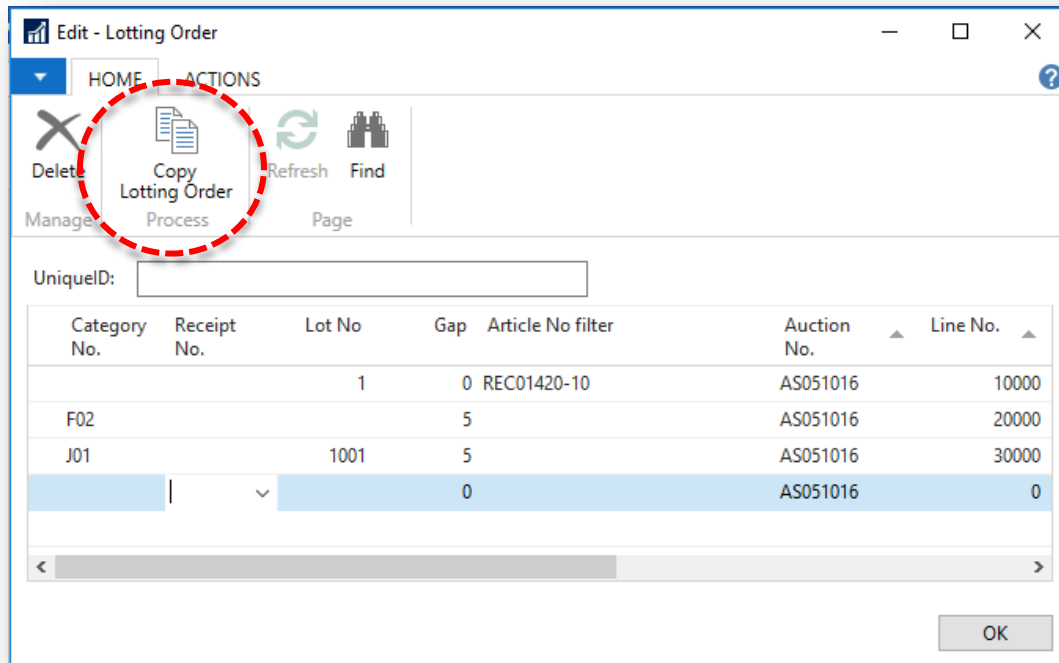
To assign specific Lot Number to individual Article:

1. Navigate to new line and in the **UID** column enter article unique ID, then in the **Lot No** column enter the lot number.

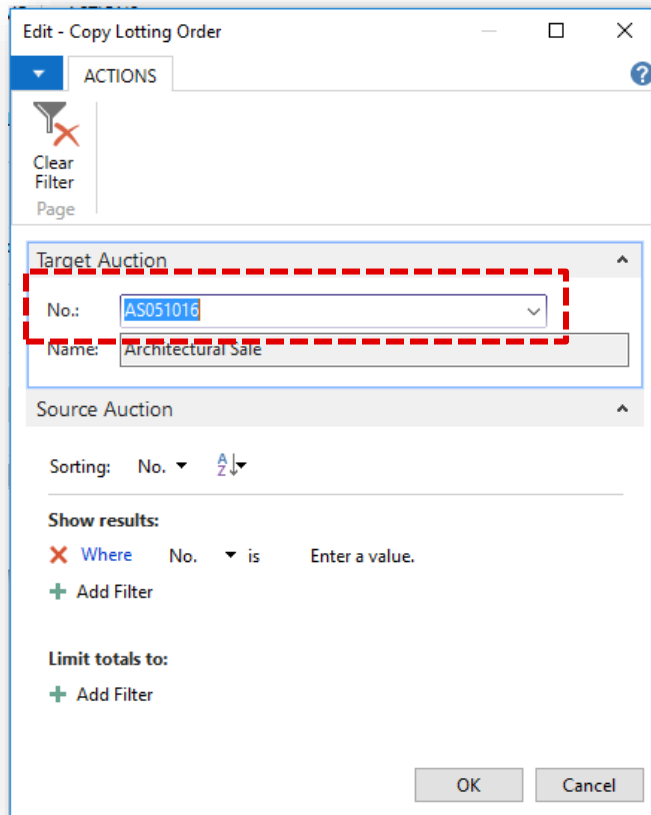


To import Lotting Order from previous Auction:

1. Select **Copy Lotting Order** from the Ribbon.



- The **Copy Lotting Order** window opens.
Select **Auction Number** to copy the order from and then click **OK** to confirm.



IMPORTANT

If a blank line is added to the bottom of the Lotting Order window, then any items in the auction, which are not added to the Lotting Order, will be picked up and lotted at the end with the next available lot number.

To create a 'blank' line in the Lotting Order window, just enter a lot number, click away from that line, then remove the lot number and click away from the line again.

AUTO-LOT

The Auto-Lot will update the lot number and lot suffix on auction lines based on the data in the Lotting Order window only.

NOTE

To use **Auto Lot** function, you need to define **Lotting Order** first.

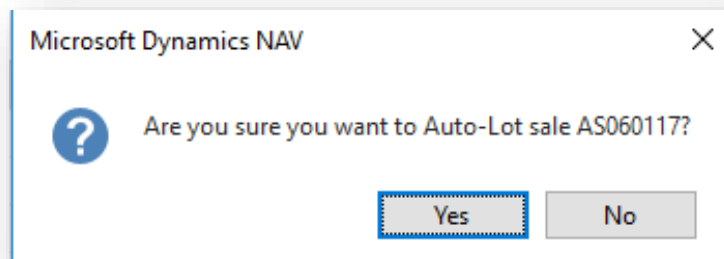
To apply lot numbers:

1. Open the auction and select **Auto Lot** from the Ribbon.

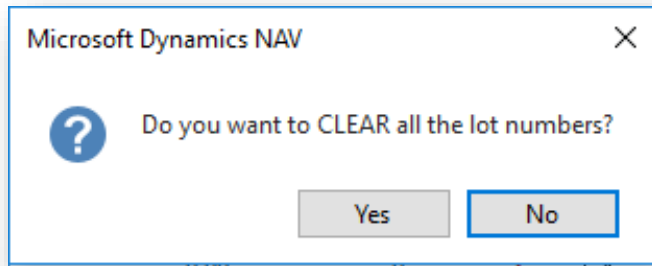
The screenshot shows the 'Edit - Auction - AS060117 Oriental works of art (General)' window. The ribbon is set to 'ACTIONS', and the 'Lotting Order' button is highlighted with a red circle. Below the ribbon, the window title is 'AS060117 Oriental works of art (General)'. Underneath, there is a section for 'Auction Details' and a table of 'Lines'.

Lot No.	Lot Suffix	Lot Status	UniquelD	Article No.	Short Description
			REC01430-1	1	A George III mahogany plate b
			REC01430-2	2	A pair of mahogany ribbed un
			REC01430-3	3	A stained mahogany model sp
			REC01430-4	4	After Jacques Bousseau (Frenc
			REC01430-5	5	A 19th century Dutch ebonise

2. Select **Yes** to confirm.



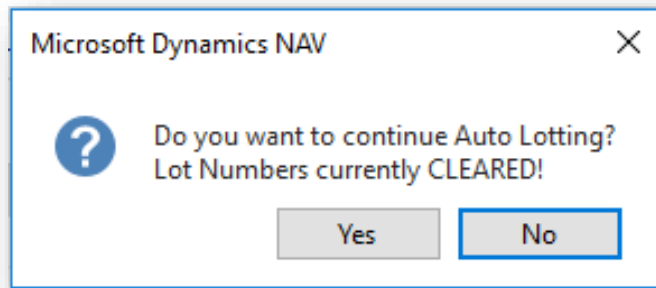
- Next message **MUST** be considered carefully before answering.



Take care as if you reply **Yes**, this will clear all the lot numbers in the auction and you cannot reverse this by cancelling at the next step.

If you say **No**, the Auto-Lot will continue but will not clear lots in the auction, which already have a lot number.

- The next message will ask you for lotting instructions.



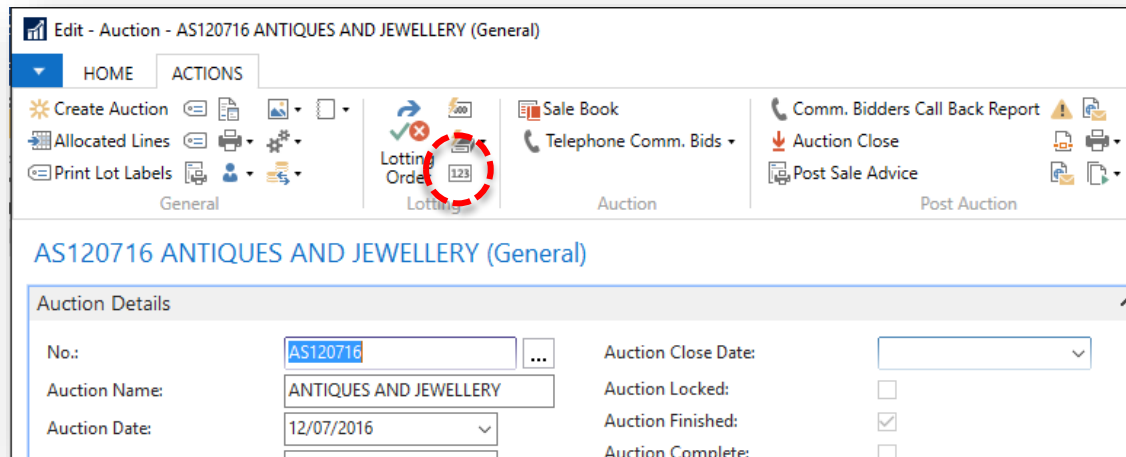
If you select **Yes** to this message, existing lot numbers have already been cleared and new lot numbers will be added.

If you select **No**, the lot numbers have already been cleared and new lot numbers will NOT be added.

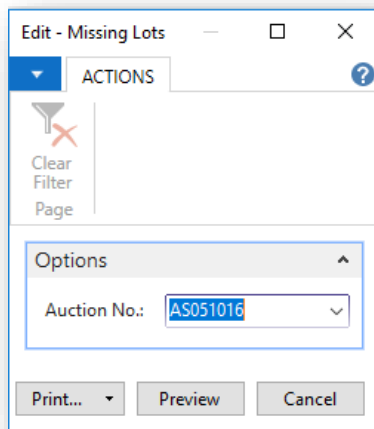
MISSING LOTS CHECK

To print or view missing lots list:

1. Select **123** located on the Ribbon.



2. The **Missing Lots** window opens.
Select an **Auction Number**, and then choose the **Print** button or the **Preview** button.



LOCKING THE LOT NUMBERS

An auction must be **Locked** after lotting has taken place, and prior to generating any pre-sale reports. Lock the auction when lotting is complete.

The auction can subsequently be Unlocked to add or amend the auction lines.

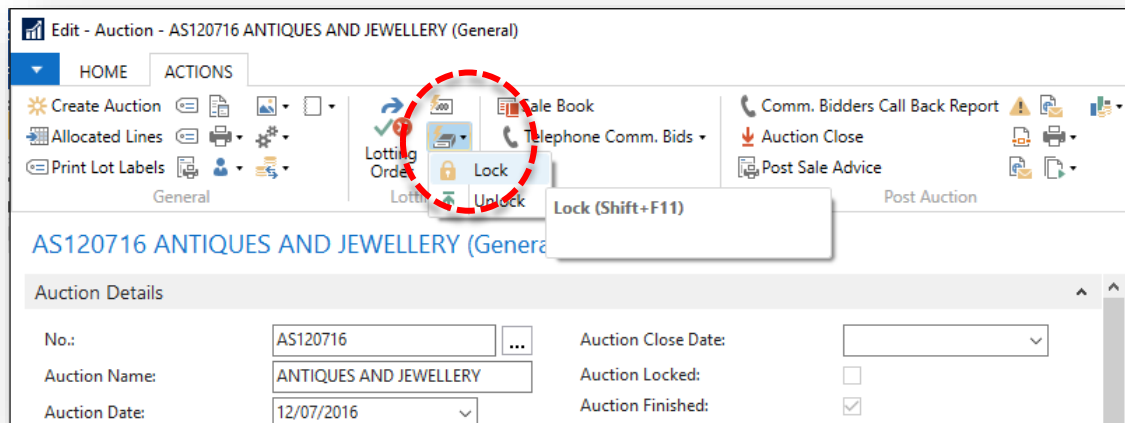
If sale is Locked you cannot edit auction header, only withdrawn action allowed - no more changes.

IMPORTANT

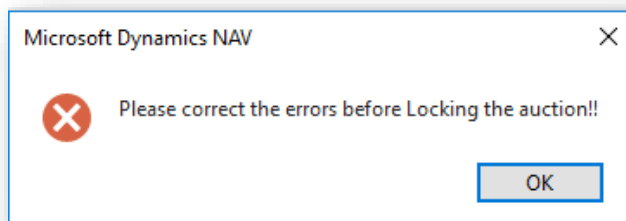
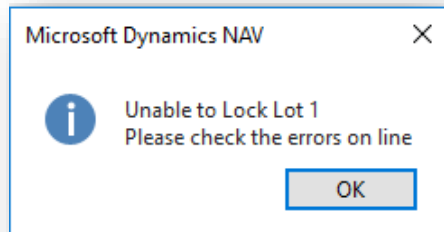
You must run **Visual Locking Check** first, to check for missing key information on the auction lines.

To **Lock** the auction:

1. Select **Lock** from the Ribbon.



- As the system attempts to lock the Lot Numbers, it will throw up any problems with articles and check for duplicated lot numbers. The user is alerted and any corrections must be made before you can fully Lock the auction.



To make necessary amendments to the articles, you must do so from within the auction lines by highlighting the article and selecting **Functions/ Goto Receipt** from the menu. This will open up relevant receipt.

NOTE

Locked auction is highlighted in green colour on the **Auctions** page, and the **Auction Locked** check box is selected.

View - Auctions

HOME ACTIONS

New Edit View View List Edit List Delete Auction Day Auction Line Report Pre Sale Advice Post Sale Advice Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Page

Auctions | N

No.	Auction Name	Auction Date	Auction Type	Auction Category	Auction Web Status	Auction Locked	Auc... Finis...	Au Co
8142	FINE PERIOD INTERIORS	21/02/2016	FINE ART & INTERI...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
8143	THE ATTIC SALE	08/02/2016	FINE ART & INTERI...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
7045	THE RICHARD S.J. CLARKE COLLECTION	15/12/2015	SPECIALIST	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
7044	The Tim Vignoles Collection	14/12/2015	SPECIALIST	Specialist	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
6039	FINE JEWELLERY & WATCHES	09/12/2015	JEWELLERY & WAT...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3119	IMPORTANT IRISH ART	02/12/2015	IRISH ART	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
8141	FINE PERIOD INTERIORS	22/11/2015	FINE ART & INTERI...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
6031	VINTAGE & MODERN JEWELERY	20/10/2015	JEWELLERY & WAT...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
9050	Country House Collections at Slane Cas...	13/10/2015	OFF SITE	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3117	IMPORTANT IRISH ART	30/09/2015	IRISH ART	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
8140	FINE PERIOD INTERIORS	20/09/2015	FINE ART & INTERI...	General	Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Edit - Auction - 3119 IMPORTANT IRISH ART (General)

HOME ACTIONS

View Edit New Delete OneNote Notes Links Refresh Clear Filter Go to Previous Next

3119 IMPORTANT IRISH ART (General)

Auction Details

No.:	3119	Viewing Days And Times:	Sunday 29th Nov 2:00pm - 5:00pm, Monday 30th Nov 10:00am - 5:00pm, Tuesday 1st Dec 10:00am -
Auction Name:	IMPORTANT IRISH ART	Auction Close Date:	
Auction Date:	02/12/2015	Auction Locked:	<input checked="" type="checkbox"/>
Auction Time:	18:00:00	Auction Finished:	<input checked="" type="checkbox"/>
Auction Category:	General	Auction Complete:	<input type="checkbox"/>
Auction Type:	IRISH ART	Auction Web Status:	Publish
Auction Location No.:		Email Auction Results:	<input checked="" type="checkbox"/>