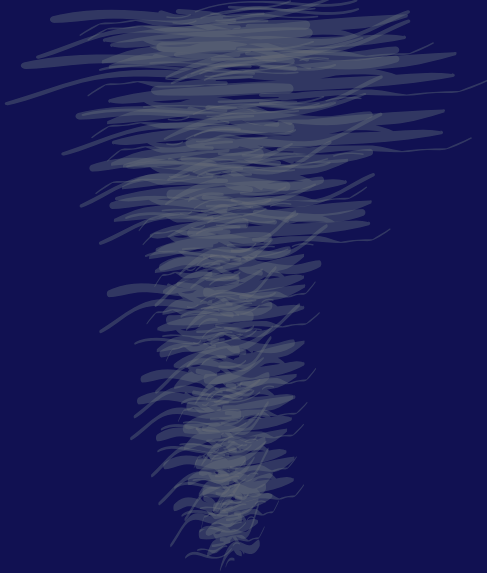


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# AUCTION SOFTWARE USERS MANUAL

VERSION 5.0



# AUCTION DATABASE USERS MANUAL

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# AUCTION DATABASE USERS MANUAL

## AUCTION SETUP

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# AUCTION DATABASE USERS MANUAL

## AUCTION SETUP

### Auction Set Up

#### Important

The auction set up screen allows you to customize the various reports generated by this database.

1. From the main menu click on the Auction Setup button.



2. Enter the year of the auction.



3. Enter the auction name and theme.
4. Enter the date of the auction.
5. Enter the instructions for the auction that you want to appear on the front cover of the auction catalog.

#### Important

You can return to this screen and modify the information at any time.

6. Click on the main menu button to return to the main menu.

## Entering a New Seller

### Important

The buyers and sellers can be imported from the most current mailing list. If you manually enter sellers, you can export the seller records and import them into the buyer records. (Refer to the Import / Export Chapter of this manual.)

1. Click on the Enter a New Seller button in the main menu
2. Click on the New Record button.



3. Enter the next highest serial number.

### Important

The current highest serial number is displayed on the screen to assist you.

4. Enter the household name.

### Important

This should include both adults if there are two adults in the household.

5. Enter the address, phone number and e-mail address for the household.

6. Enter the names of the adults in separate fields.

### Critical

The adult name are used for the look up field in the auction item entry screen.

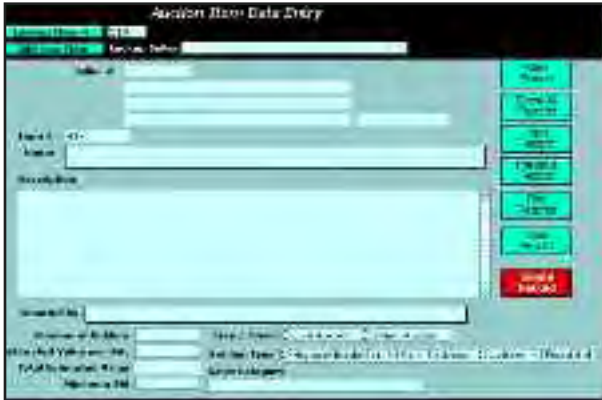
7. Click on the Main Menu button to return to the main menu when you have finished entering new buyers into the system.

# AUCTION DATABASE USERS MANUAL

## AUCTION SETUP

### Entering Auction Items

1. Click on the Auction Item Entry button
2. Click on the New Record button.



3. Click in the look up seller box.



4. You'll see a list of names in a pop down box.
5. Type the first few letters of the person who is going to donate the auction item.
6. Use the up and down arrow keys to select the person who's going to donate the item.

### Critical

If the name is not listed you will need to enter the Seller Information. (Refer to "Entering a New Seller" section of this chapter.)

7. Press the enter key.
8. Press the tab key.



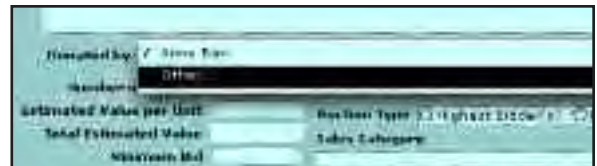
### Important

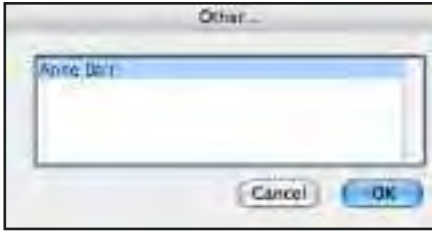
The seller number the address in the phone number should be filled in automatically. If the seller does not appear in the look up seller window you need it had them as a seller. Referred to Adding New Sellers to the Database section of this manual.

9. Enter the name of the auction item.
10. Press the tab key and enter the description of the item.
11. The donated by field will be automatically filled in.

### Important

If you wish to change the donated by field, click on the field and select other. Enter the information as you would like to have it appear in the catalog.





12. Enter the number of bidders.
13. Enter the donated value per unit.

### Critical Information

This field is required by the IRS. It is the estimated value of the item being donated. This should be specified by the donor. Remember this should be entered as the cost per bidder. For example, if a person is donating a dinner for eight and the total value is \$160 the estimated value per unit would be \$20. The database will calculate the total estimated value of the item being donated.

14. If the person donating the item has requested a minimum bid, enter this number.

15. Select either the live or the silent auction for this item.

### Recommendation

It might be easier to initially enter all items as silent auction items for individual bidders except the ones your are sure should be included in the live auction. You can then print out a catalog and select the items for the live auction. Once the live auction items are selected, modify the database as needed.

16. Enter the auction type.

### Important

Highest bidder indicates the item will be sold individually.

Pair indicates that the item will be sold in pairs

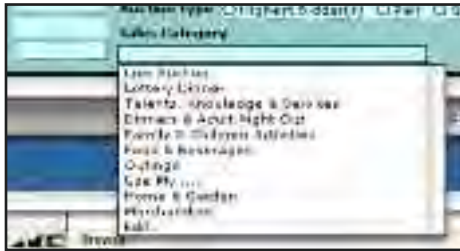
Group means the item will be sold as a group bid.

Lottery is used for items of a fixed bid where people put their bids on a slip of paper. The winning bids are awarded by a drawing. (This has been used to make dinners affordable.)

Fixed Bid is used for items that have a fixed bid. Typically a family night where 10 to 20 people can participate.

# AUCTION DATABASE USERS MANUAL

17. Use the pull down menu to select the sales category.



## Important

The categories can be modified by selecting the Edit option



## Modifying Auction Items

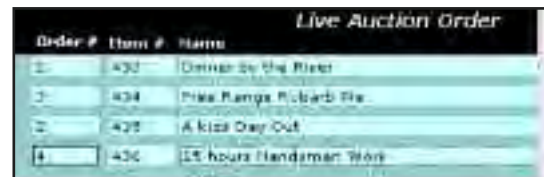
1. Select Auction Item Entry from the main menu.
2. You can look up the auction item you're interested in modifying by typing the item number in the look up item number box.



3. Click on the look up item number button and the item will be displayed on the screen. You can make modifications to the item as needed.

## Setting the Live Auction Order

1. Click on the Set Live Auction Order button in the main menu
2. Enter the order for the live auction.



## Printing the Live Auction Order

1. From the main menu and click on the Print Live Auction Order button.

## Entering Live Auction Comments

### Important

These comments are used to help the auctioneers. It should include information about what Items went for in previous years or information that would help the auctioneer. This will only appear on the Auctioneer's Information Report

1. Click on the Live Auction Comments button in the main menu.

### Important

The database will only display the items that are in the live auction.

2. Enter any comments.



3. Use the Next Record and Previous Record buttons to display the remaining live auction items.

## Printing the Auction Catalog

1. Click on Print Catalog from the main menu .
2. Click on OK.



3. Click on the Print button to start the printer.
4. The program will automatically print the catalog.

### Important

If your computer is configured to create Acrobat documents you can use this function to create a downloadable version of the catalog.

### Known Bug

On some Windows systems, part of the front page of the catalog is cut off. If this occurs, you will need to shorten the instructions on the front page. (See the "Auction Setup" section of this chapter.)

# AUCTION DATABASE USERS MANUAL

## AUCTION SETUP

### Printing the Auctioneers Report

#### Important

This will print a report for the auctioneers to use to conduct the live auction.

1. From the main menu select Auctioneers Information.
2. Click on OK .
3. Click on Print to start the printer.

### Printing the Silent Auction Bid Sheets

1. From the main menu select Silent Auction Bid Sheets.
2. Click on OK.
3. If you have lottery auction items, click on Yes. This will print out sheets for recording the winners and bidding slips.
4. Click on Print to start the printer.

### Printing the Live Auction Bid Sheets

1. From the main menu select Live Auction Bid Sheets.
2. Click on OK .
3. Click on Print to start the printer.

### Entering a New Buyer

#### Important

The buyers and sellers can be imported from the most current mailing list. (Refer to the Import / Export Chapter of this manual.)

#### Critical

If you are entering buyers the night of the auction, and you are using more than one computer. The new buyer must be entered into both computers. **It is critical that the buyer number be the same in both computers.**

This is why it is best to have all of the anticipated buyers entered into the program before the night of the auction.

1. Click on the Enter a New Buyer button in the main menu



- Click on the New Record button.



- Enter the next highest bidder number displayed on the right side of the screen.
- Enter the household name.

**Important**

This should include both adults if there are two adults in the household.

- Enter the address, phone number and e-mail address for the household.
- Enter the names of the adults in separate fields.

**Critical**

This is used for the look up field in the auction item entry screen.

- Click on the Main Menu button to return to the main menu when you have finished entering new buyers into the system.

## Printing Bidder Labels

**Important**

This will print labels with the household information and the bidder number. These can be attached to cards with the bidder number printed in large lettering to be used during the bidding process.

**Important**

**If a person comes to the auction and they don't have a pre printed bidder label, you must enter them in the buyers database.** (See "Entering a New Buyer")

It is not necessary to print a new label. Just write the name and **bidder number assigned in the database** on the bidder card.

- From the main menu click on Print Buyer Bidding Labels.
- Click on the Bidder Labels button.
- Insert the Avery 5160 or equivalent mailing labels in your printer.
- Click on the OK button.
- Click on the Print button to start the printer.

### Printing the Cross-Reference Sheets

#### Important

This will print out two reports. Bidder number sorted by last name and a list sorted by bidder number.

1. From the main menu select Cross-Reference Print Out.
2. Click on OK .
3. Click on Print to start the printer.

### Setting Up Multiple Computers for Sales Data Entry

#### Important

This program allows the option to run multiple computers to speed up sales data entry.

1. Once the all the buyers, seller and auction items have been entered it is possible to set up multiple computers.
2. Make a copy of the entire Auction folder and install it on additional computers as needed.
3. Enter sales data normally on each computer.

#### Critical

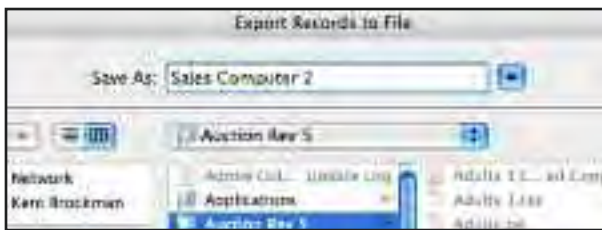
Make sure you have a system to identify the sales that have been entered so they are not entered again on another computer.

## Exporting Sales Records

### Important

When you are ready to combine the sales information into the main computer, export the sales records using the Export Sales Records function.

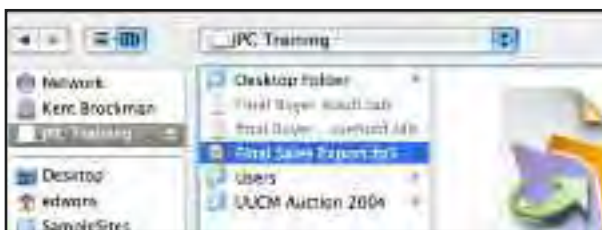
1. Select the Export Sales Records function from the main menu.
2. Select a file name.



3. Save the file to a USB drive or floppy so it can be transferred to the main computer.

## Importing Sales Records

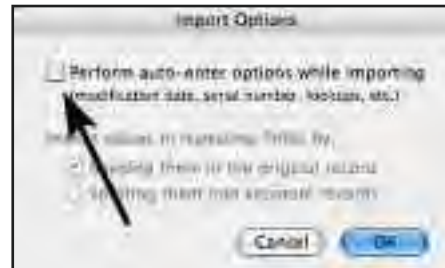
1. Select the Import Sales Records function from the main menu.
2. Locate the file containing the records.



3. Verify that the field map is correct.



4. Click on Import.
5. Deselect the Auto Enter option.



6. Click on OK.



## AUCTION DATABASE USERS MANUAL

### DURING THE AUCTION

#### In This Chapter

- Entering Auction Sales
- Printing the Silent Auction Winners
- Printing the Payment Report
- Entering Payment and Printing a Receipt

# AUCTION DATABASE USERS MANUAL

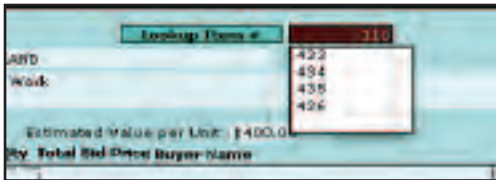
DURING THE AUCTION

## Entering Auction Sales

1. Click on the Auction Sales button.



2. Enter the item number currently being auctioned in the item look up field.



3. Click on the Look up Item Number button.
4. The item should be displayed on the screen.



5. Click in the buyer number field.
6. Enter the buyer number.

7. Press the tab key.

### Important

The buyers name should automatically appear on the screen.

8. Enter the Unit Cost paid by the buyer.
9. Enter the quantity purchased.

Number for Sale: 1	Estimated Value per Unit: \$400.00		
Buyer #	Unit Cost	Qty	Total Bid Price Buyer Name
199	\$150.00	1	\$150.00 MICHELLE STOTTUMIRE

### Important

The total cost will be automatically calculated by the database.

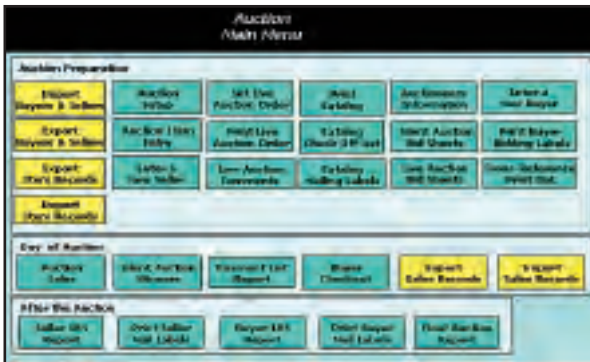
10. Enter the number for the next buyer of the item being auction and continue the process until all the buyers have been entered.
11. Use the item look up feature to select the next item.

## Printing the Silent Auction Winners Report.

### Important

This report can be printed as soon as all the silent auction winning bids have been entered.

1. From the main menu select Silent Auction Winners.



2. Click on OK .
3. Click on Print to start the printer.

## Printing the Payment Report.

### Important

The payment list report will print out the total revenue generated by the auction.

It will also print a listing of the buyers and what they owe.

1. From the main menu select Buyer Check Out.
2. Click on the Payment List Report.

3. Click on OK .
4. Click on Print to start the printer.

## Entering Payment and Printing a Receipt

1. From the main menu click on Buyer Checkout .
2. Click on the Find a Buyer button.
3. Enter the buyer number.



4. Click on the Find button.



5. The buyer name should appear on the screen.
6. Click on the Calculate Total button.



7. The total due should appear on the screen.
8. Enter the payment received.
9. Click on the Receipt button.

10. The computer will automatically generate a receipt for the buyer.
11. Repeat the process for the next buyer.



## AUCTION DATABASE USERS MANUAL

### AFTER THE AUCTION

#### In This Chapter

- Printing the Seller IRS Report
- Printing the Seller Mailing Labels
- Printing the Buyer IRS Report
- Printing the Buyer Mailing Labels
- Printing the Final Auction Report

# AUCTION DATABASE USERS MANUAL

## Printing the Seller IRS Report.

### Important

This report will generate a report to the sellers indicating their donation and the winning bidders.

1. From the main menu select Seller IRS Report.



2. Select the Standard report option .
3. Click on Print to start the printer.

### Important

The report will have page numbers in case the pages get out of sequence.

## Printing the Seller Mailing Labels.

### Important

This will generate generate mailing labels to mail out the seller IRS report.

1. From the main menu select Print Seller Mailing Labels.
2. Insert the mailing labels in the printer.
3. Click on OK.
4. Click on Print to start the printer.

### Important

The labels will print in the same order as the report.

## Printing the Buyer IRS Report.

### Important

This report will generate a report to the buyers indicating their donation and the items they won.

1. From the main menu select Buyer IRS Report.
3. Click on OK.
4. Click on Print to start the printer.

## Important

The report will have page numbers in case the pages get out of sequence.

### Printing the Seller Mailing Labels.

## Important

This will generate generate mailing labels to mail out the seller IRS report.

1. From the main menu select Print Seller Mailing Labels.
2. Insert the mailing labels in the printer.
3. Click on OK.
4. Click on Print to start the printer.

## Important

The labels will print in the same order as the report.

### Printing the Final Auction Report

## Important

This will generate a report of items and the winning bidders. This should correspond to the hard copy bid sheets.

1. From the main menu click on Final Auction Report.
2. Click on OK.
3. Click on Print to start the printer.



# AUCTION DATABASE USERS MANUAL

## IMPORT EXPORT FUNCTIONS

### In This Chapter

- Preparing to Import Household Data
- Clearing Data from the Buyer & Seller Databases
- Importing Buyer and Seller Data
- Exporting Household Data
- Exporting Auction Item Data
- Clearing Data from the Item Database
- Importing Item Data
- Exporting Auction Item Data

# AUCTION DATABASE USERS MANUAL

## Preparing to Import Household Data

### Important

In order to import data you will need to create two sets of data from your present database or mailing list.

- This program will import a tab delimited text file.
- You can create this with most any program if you use "Save As" then select the tab text file option.
- You will need the following information to import people into the program.

## Main - Buyers & Sellers

### Critical

Only one set of data per serial number

1. Household Serial Number (This functions as a seller number and a bidder number)
2. Household Name
3. Street Address
4. City, State, Zip
5. Phone #
6. e-mail address

## Adults - Buyers & Sellers

(One or more sets of data per serial number)

### Important

This information is needed for the lookup, auto entry functions and all final auction reports.

### Critical

This household serial number must match the serial number for the household.

1. Household Serial Number.
2. Last Name, First Name

## Clearing the Data from the Buyer and Seller Databases.

1. From the Window menu, select Auction Sellers Main.
2. Form the Records menu select Show All records.



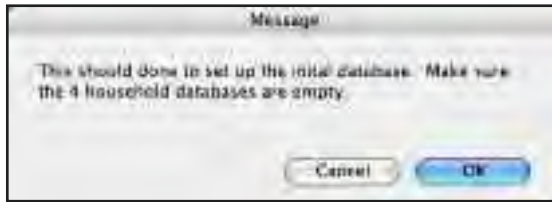
3. From the Records menu select Delete All Records.
4. Click on OK to delete the records.

5. Repeat the process for:

- Auction Buyer Main
- Auction Sellers Adults
- Auction Buyer Adults

## Importing Buyer and Seller Data

1. From the main menu select Import Buyer & Sellers.



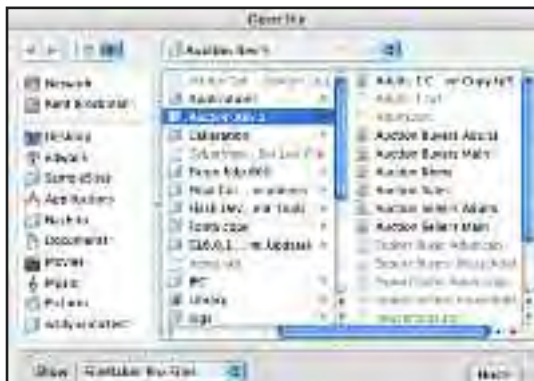
2. If the databases have been cleared, click on OK.

### Critical

Make sure all the records have been removed from the Buyer Main, Buyer Adults, Seller Main and Seller Adults databases.

3. Click on OK to household data into the Buyer Database.

4. Select the file containing the household data.



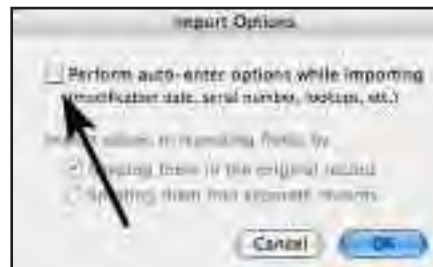
4.1 If necessary, select the appropriate file type.



5. Verify that the data is going into the correct fields.



6. Deselect the option for auto enter options.



7. Click on OK.

8. Repeat steps 3 to 7 to import the household data into the Sellers database.

## AUCTION DATABASE USERS MANUAL

9. Repeat steps 3 to 7 to import the adult data into the Sellers database.
10. Repeat steps 3 to 7 to import the adult data into the Buyers database.

### Exporting Household Data

#### Important

You can use the household data in this database for other uses using the export function.

The program will create 4 tab delineated text files in the same folder as the auction program.

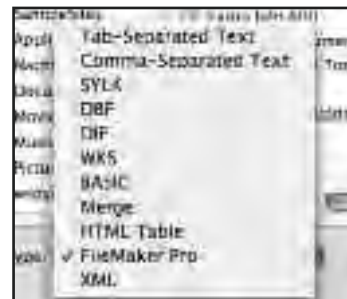
1. From the main menu select Export Buyer & Sellers.
2. Click on OK to create the files.

### Exporting Item Data

#### Important

You can export the Item records to transfer them to a second computer or to correct formatting errors caused by cutting and pasting information during data entry.

1. From the main menu select Export Item Records.
2. Click on OK.
3. Enter the desired file name.
  - 3.1 If you wish to correct formatting problems, save the file as Tab-Separated Text.
  - 3.2 If you are just transferring the data to a second computer, save the file as a FileMaker Pro file.



### Clearing the Data from the Item Database.

1. From the Window menu, select Auction Items.
2. Form the Records menu select Show All records.

# AUCTION DATABASE USERS MANUAL

3. From the Records menu select Delete All Records.
4. Click on OK to delete the records.
5. Verify that the data is going into the correct fields.
6. Deselect the option for auto enter options.

## Importing Item Data

1. From the main menu select Import Items.

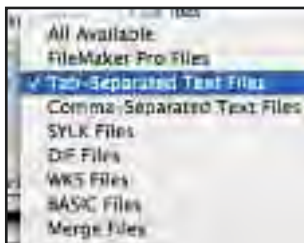


2. If the databases have been cleared, click on OK.

### Critical

Make sure all the records have been removed from the Item database.

3. Select the file containing the Item data.
  - 3.1 If necessary, select the appropriate file type.



**Critical**  
If you fail to uncheck the auto enter option, information in the Donated By field will be over written.

7. Click on OK.

