evo-auction

Buyer Card

User guide

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BCN

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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.
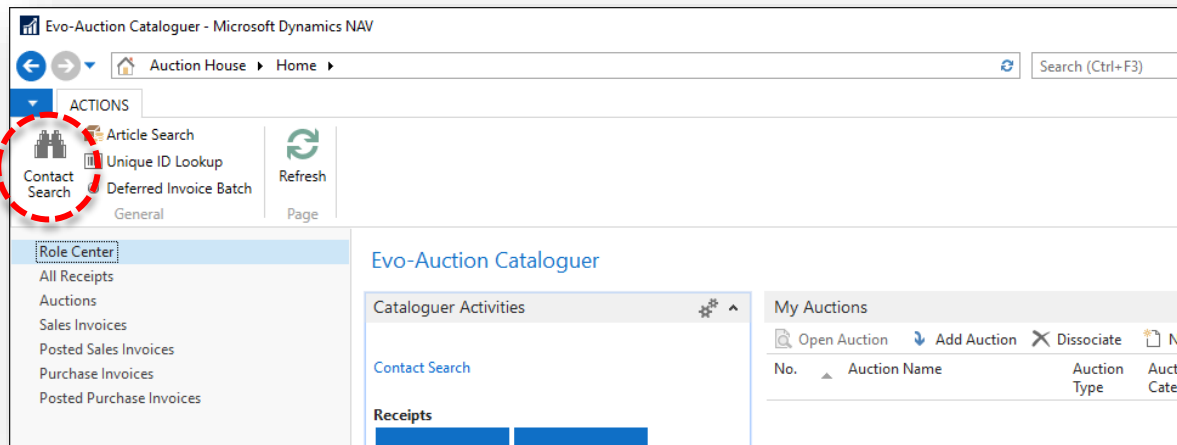
2. To search for a contact, go to the **Filters** pane. You can search by filling in any information such as telephone number, postcode, surname and so on.

3. Select **Search** from the Ribbon.
    To cancel search/filter and bring all the contacts list back, select **Clear** from the Ribbon.

	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.

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.

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.
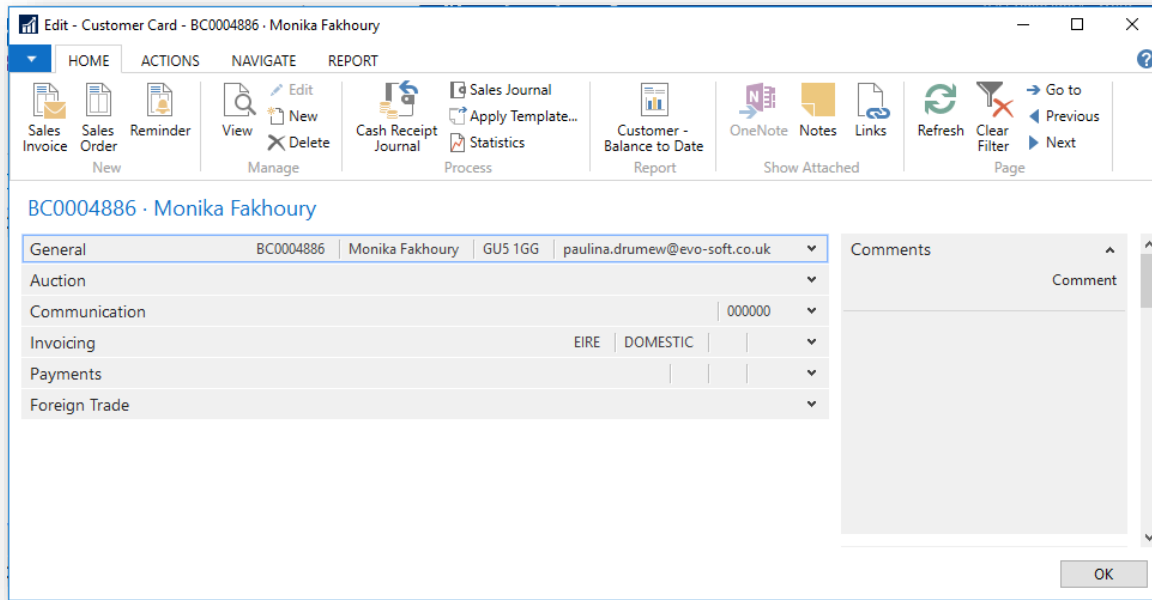
GENERAL FASTTAB

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

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: - 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.

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: • 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.

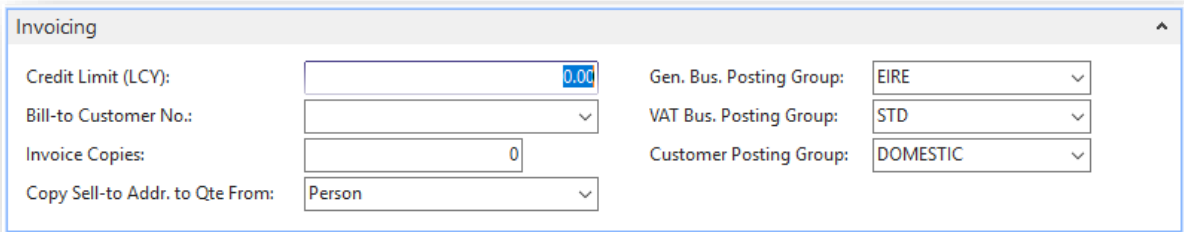| Field name	Type	Description
Salesperson Code	Lookup	Synchronised with the Communication FastTab on related contact card. Select a code from the list.
Search Name		Search name is the name by which you will search for this buyer. Generated from the **Name** field on the General FastTab and synchronised 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.

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: • 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.

Field name	Type	Description
Application Method	Dropdown	This field specifies how to apply payments from this buyer. • **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: • 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.

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.

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