Note: System counts any item having a bid as ‘won’

Note: Any email sent will not include the auction summary header.

Logfile:

First time import:

1. Save csv file as “importDataFull.csv” under /srv/hawthorn
2. Go to /admin/importUsers to import.
3. Change firstId in importUserEmail to be the lowest id you want an email sent to. Make sure send it not commented out.
4. Make sure correct domain is set up.
5. Check log to see to whom emails were sent and who was not.
6. ?? Print labels for those without email

Set up auction:

1. Go to admin
2. Click add button next to ‘auction’ under the ‘audio’ heading.
3. Enter the date/time people can start bidding, the date/time the auction closes and set sale begins, and the date/time that the set sale ends. Enter an auction name if desired.
4. Click save

Add items:

1. Click on “Add Items to Auction” under the “Utilities” header
2. Select auction, Category, Label and minimum bid
3. Click Start creating items button.

This takes you to a new page with those values already filled in. To change prefilled values go back to previous steps 1-3.

1. Fill out all desired values. Lot Ids are sequential, it should already be filled out but you can override it by entering a new number.
2. To add a thumbnail or full size image click on Browse next to the desired image type, then navigate to your image file and click ok.
3. Click ‘Create item’. If all was successful you’ll be redirected to the same page with the same preloaded values and the correct next lot id.

Change items:

1. Click on “Items” under “Audio” header
2. Search for your item, of filter by auction on the right-hand panel
3. Click on desired item name.
4. Change information and save.

Add Consignors:

1. Click on add next to “Consignors” under “Audio” heading.
2. Fill in desired info, keep in mind this will be a separate entry from a ‘user’.
3. For address, if the consignor is a ‘user’ he should have an address, you can find it in the dropdown. Otherwise if his address doesn’t exist in the addresses table, create a new one and select it from the dropdown.

Add Consignments:

1. Click add button next to “Consignments” under “Audio” header.
2. Select item and consignor from dropdown.
3. Enter percentage to apply to the range between the minimum dollar amount and the max.
4. Save.
5. You’ll need to do this for each ‘level’ of the range.

Add Bulk Consignments:

1. Find “Bulk Consignment” under “Utilities” header.
2. Fill in the auction you’d like to add to.
3. Click on Bulk Consignment.
4. Choose your consignor from the dropdown list. If he doesn’t exist you’ll have to create him, see “Add Consignors” section of the manual.
5. Choose the items to add consignments on. These will all have to be under the same percentage breakdown. For a different breakdown see Add Consignments section.
   1. Only items without bids show up on the list, we can change this if it’s a problem.
6. Select item(s, use control button to select multiple) and click arrow right to add to list, click left to remove.
7. Adjust percentage table to reflect consignor agreement.
8. Click add consignments button.

Adjusting Lot IDs:

If you want to insert an item instead of adding it to the end of the lot ids, you can adjust the existing ids.

1. Click on ‘Adjust Lot Ids’ under ‘Utilities’ header
2. Chose auction and go
3. To make space to insert a new item, chose adjust “Up”.
4. Enter the first lot Id you want adjusted. Say you want to add a new item into lot Id 12. Enter 12 in the box. 12 will be come 13 and now 12 is left free for the new item.
5. Add your new item and give it the correct lot id (12 in our example).
6. To adjust the list because of a deletion chose “Down”.
7. If you deleted the item with lot id 12, you want to enter 13. 13 will become 12 (since 12 was then missing), 14 will become 13 etc.

Print Labels:

Mailing Addresses:

1. Go to “Addresses” under “Audio”
2. Scroll/Search to find an existing address
3. Click, change any desired info and save.
4. To create a new address, click ‘add address’
5. Enter info
6. Chose user from dropdown to assign it to
7. Click save.

Add Users:

1. Click on ‘Add User’ under ‘Utilities’ header
2. Enter all information. If you don’t have a username use their email
3. Check the box if you want a welcome email containing their password to be immediately sent to them. Uncheck if not.
4. Save
5. If you have the user’s address, create an address and assign it to this user. See “Mailing Addresses” section.

A user will automatically be created for this user. To change any info:

1. Go to “User Profiles” under “Audio” header.
2. Search or scroll to find the correct username and click on it.
3. Change/add info and save.

Consignor Reports:

1. Go to “Consignor Report” under “Reports”
2. Enter the auction. To see a specific consignors report also enter his id, otherwise leave id blank.
3. To email click on “Email Consignor Report…” and confirm yes or no.
4. You can click on any of the consignor’s names to see their individual report.
5. Click on Print if so desired.

Add Bids:

1. Go to “Create Bid” under “Utilities”
2. Enter auction and click on the link
3. Enter relevant info
4. Winner is unchecked by default. Only check this if you’re 100% sure this bid should be the winner.
5. If you’ve already run invoices for this segment you’ll need to rerun that user’s. See Invoices section.

Remove Bids:

1. Go to “Bids” under “Audio”
2. Filter by auction
3. Search for the user
4. Look to see if this bid was a winner. You can make absolutely sure by clicking on that bid link and seeing if winner is checked or not.
5. If the bid was not a winner you can just delete the bid:
   1. Check the box next to that bid
   2. Select “delete selected bids” from the dropdown
   3. Click “Go”
6. If the bid WAS a winner:
   1. Take note of the item.
   2. Delete the bid (see above).
   3. You’ll have to rerun mark winners. See that section.
   4. Get new winner for that item (see Find Item Winner section)
   5. If invoices were already run you’ll need to rerun both the deleted bid’s user and the new winner’s invoice. See “Create Individual Invoice” section.

Find Item Winner:

1. Got to “Bids” under “Audio”
2. Filter by auction and winner.
3. Enter search parameter. You can search by lotId, item name or artist.
4. Click search icon.
5. Anything matching query will show up, the user is on the left-hand side of the row.

Conditions:

Locking Auctions:

After the blind auction is over, you’ll need to manually ‘lock’ that part of the auction. After it has been locked no existing information should be changed. Locking the flat auction ends that segment and generates the invoices.

To Lock:

1. Do ANY manual changes needed. Especially checking the conditions to see if you need to edit/delete etc any bids.
2. Go to “End Auction” under “Utilities”
3. Enter desired auction and click
4. You will see the current status of the auction, and only have the option to lock the correct segment (blind or set sale).
5. Click on “Lock” and confirm.
6. Reminder: This will generate the invoices for this segment.

Adding Shipping

After each segment (blind and set sale) is over and locked, you’ll have to manually calculate and enter shipping. You’ll be able to page through individual invoices and save the shipping.

1. Go to “Shipping by Invoice” under “Utilities” header, enter auction.
2. You’ll see one invoice. Set the shipping if desired and save.
3. Click next or back to go that direction.
4. Put in a number (sequential page numbers) and click “jump” to do so.
5. The invoice owner will be linked at the top, you can click on it to go to their full invoice information.
6. You can go to only invoices that don’t have any shipping entered yet at the top.

Invoices:

Generate Invoices:

Invoices are generated automatically when you lock an auction segment. See section (Lock Auction)

Generate Individual Invoices:

End Flat auction for single user. TODO

Email/Print All Invoices:

First make sure all other invoice actions have been taken. Check conditional bids and any potential discounts.

1. Enter auction next to “Invoices” under “Utilities” and click on link.
2. Click email button and confirm to email all invoices to their owner’s.
3. Click print button and confirm to print.

Get User Invoices:

1. Go to “Get Invoices” under “Reports”
2. Enter auction and user Id and click link.

Print/Email Individual Invoices:

First make sure all other invoice actions have been taken. Check conditional bids and any potential discounts.

1. Get correct invoice (See Get Invoices section)
2. Click print link to print
3. Click email button to email to that user.

Get/Edit All Invoice Info:

1. Go to “Invoices” under “Audio”.
2. Filter by auction.
3. Find or Search for username and click on it.
4. All invoice email can be edited and saved.

Items on Hold:

Discounts:

1. Go to “Set Discount” under “Utilties” and filter to find the invoice

OR

1. Go to “Invoices” under “Audio”
   1. Filter or search to get to invoice and click on it
   2. Click on the “Set Discount Page” link
2. Enter discount percentage in the “Enter desired percent” box (in percent form, i.e 9% is 9 etc.)
3. Click Calculate Discount
4. The calculated total discount value will appear in “discount” box. Tax has been recalculated on the new discounted total amount.
5. Save as long as all looks correct.

Add Payment:

1. See Get User Invoices section
2. Click on “Add Payment to this Invoice” button
3. Enter remaining info and save.

OR

User Breakdown:

1. Click on ‘User Breakdown” under “Utilities”
2. Click on type of user you want to list
3. Clicking on the user’s ID will take you to their address entry page.
4. Click print to print the address of those users.

Auction Reports:

1. Go to “Reports” header
2. Click on desired report & pick the auction.

User Balances:

1. Go to “User Balances” under “Reports”
2. Click on the link and choose user or directly input user ID and use go quick.

Auction Balances:

1. Go to “Auction Balances” under “Reports”
2. To see a specific auction balance chose in dropdown and go.

Printed Catalogs:

This is to track when a user pays for the next few printed catalogs.

1. Go to “Printed Catalogs” under “Audio”
2. Click add
3. Choose user from dropdown
4. Choose auction. This should be the first auction you want them to receive the catalog.