

Doing More with Names

Once you've entered names, you'll want to find them and view key information such as their donations, purchases, reservations, and payments. This chapter covers how to **display** this information on screen.

In addition to on screen display, *Auction!* provides many printable documents and reports for names.

Documents such as invoices, statements, donor receipts, and details are "one name per page" and generally intended to be shared with guests. To learn how to print these, see *Documents*.

Reports are intended primarily for administrative use by the auction chair and their team. Reports show as many names per page as will fit. For details on the many options for organizing and printing reports, see *Reports*.

Finding a Name

Searching for names is usually easy, by just scrolling through the list. Sometimes it's more challenging. When a couple has different surnames, you may not know the other name under which they would be listed. Someone could be listed by Company rather than Last Name. *Auction!* helps you find these names.

To find a name:

1. Click **Edit, Find Name**.

or

Click the **Find** button on the Names toolbar, which shows a silhouette of a person and binoculars.

or

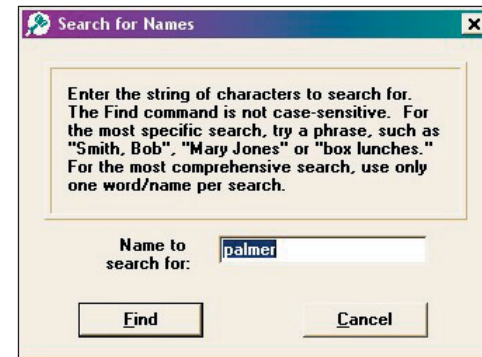
Right-click on Names List to display the Popup menu, and click **Find Name**.

2. **Find Name** screen is displayed. Enter part or

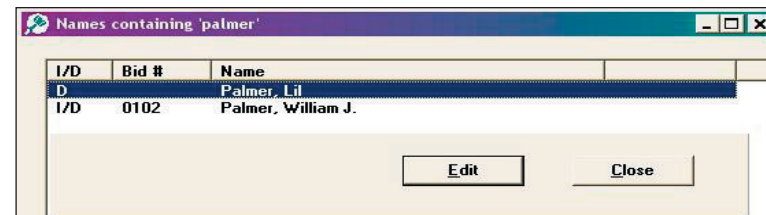


all of the name to search for. You can enter the name in uppercase or lowercase letters. *Auction!* will search for all occurrences of the typed name.

3. Click **Find** or press **Enter** to search for the name.



4. *Auction!* displays **Results**, captioned "Names Containing..." The name to find is indicated in the caption, and all occurrences are shown. Select any name and click **Edit** or **double-click** the name to edit it.



5. Close **Results** to return to **Find Name**. It remains open, allowing you to revise the search requirements if needed.

Tip

Find Name searches in several formats. For example, searching for "Bob Clark" or "Clark, Bob" will both find "Clark, Bob." If you are not sure whether he was entered as Robert Clark or Bob Clark, then search for "Clark."

Viewing Donations for a Name

Anyone who has given items or cash for your event is a Donor. The items might be Silent, Live, Basket Components or Cash Donations. This technique is for viewing donations on screen. For printed information, see *Printing Donor Receipts, Statements, Printing Full Name Details, and Name Reports*.

1. Select/highlight the donor whose donations you'd like to see.

2. Click View, Donations for Selected Name.

or

Click the View Donations button on the Names toolbar, which shows a hand holding several gifts.

or

Edit the name of interest, and then click View Donations on Name Entry. When there are no donations for the name, View Donations is disabled on this screen.

or

Right-click the name of interest, and click View Donations.

3. Results are shown, captioned Items Donated by... and the selected name. Item values are totaled at the lower edge of the screen.



Type	Category	Item #	Short Description	Value
BASKET		8001	Wheelbarrow	\$100.00
BASKET		8003	Packets of Seeds	\$20.00
BASKET		8006	Shovel, Hoe, and Rake	\$35.00

Silent Items: \$0.00	Cash & Service Donations: \$0.00	Total Value of Donations:
Live Items: \$0.00	Basket Items: \$155.00	\$155.00

Close

View Donations for Name (alternate look)

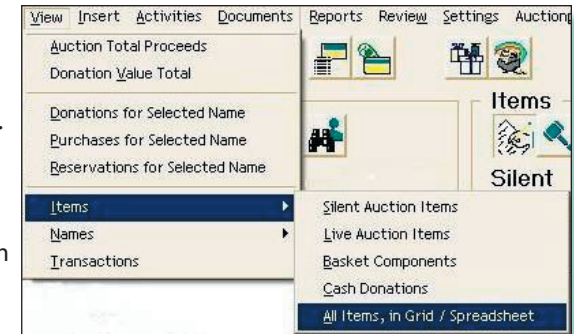
Another way to view donations for one or more names is the **Items Grid view**. This will work on an 800 x 600 resolution screen; it works best on screens of 1024 x 768 or larger.

1. Click the All Items, in Grid view button on the Items toolbar.



or

Click View, Items, All Items in Grid / Spreadsheet.



2. Scroll right (if needed) until the Donor column is visible.

3. Click the column heading labeled Donor to sort the grid by donor name.

4. Scroll down and click the first occurrence of the donor name of interest. The entire row will be highlighted and you can review item details.

Item #	Short Description	Value	Donor
000	Original Book of Poetry	\$0.00	Bates, Katherine Lee
8003	Movie Tickets for Two	\$20.00	Bijou Theater; Stratton, Myron
700	Print Invitations	\$350.00	Chiruck Copy Shop
1000	Table Centerpiece	\$25.00	Friends of Pikes Peak School
8001	Wheelbarrow	\$100.00	Garden Specialties Shop; Hu...
8003	Packets of Seeds	\$20.00	Garden Specialties Shop; Hu...

Tip

Click any heading of the grid view to sort it by that column.

Tip

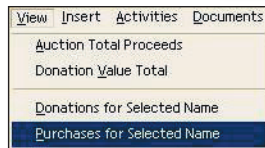
The grid view is an extremely large display, wrapping over many screens, and cannot be printed directly from Auction!. Use the Reports menu to print out relevant information, or use Export to select desired columns and print from Excel™ or another spreadsheet program.

To print only a portion of the grid view, center and adjust the data to show the information of interest on your screen. Click and hold Alt down then click Print Screen or PrtScn on your keyboard. This copies the image to the Windows™ clipboard. You can paste the image into a word processing document that can be printed.

Viewing Purchases for a Name

Anyone who may purchase items at your event is a Bidder. Items might be Silent or Live. This technique displays purchases on screen. For printed information, see Bidder Invoices, Statements, Printing Full Name Details, and Name Reports.

1. Select/highlight the bidder whose purchases you'd like to see.
2. Click the View Purchases button on the Names toolbar, showing a shopping cart.
or
Click View, Purchases for Name.
or
Edit the name of interest, and click View Purchases on Name Entry. When this person does not have any winning bids, View Purchases will be disabled.
or
Right-click the name of interest, and click View Purchases.



Results are displayed, captioned "Items Purchased by..." and the name selected. Item prices are totaled at the lower edge of the screen. Sales tax is not included.

Type	Category	Item #	Short Description	Price
LIVE		0003	Principal for a Day	\$500.00

Silent Items: \$0.00	Cash Donations not applicable here	Total Purchases:
Live Items: \$500.00	Basket Items not purchased individually	\$500.00
Pledge Bids: \$0.00	Reservations: \$0.00	

View Purchases for Name (alternate look)

Another way to view purchases for one or more names is on Items Grid view. This will work on an 800 x 600 resolution screen; it works best on screens of 1024 x 768 or larger.

1. Click the All Items, in Grid view button on the Items toolbar.
2. Scroll right (if needed) until the Bidder column is visible.
3. Click the column heading labeled Bidder to sort the grid by bidder name.



Scroll down and click the first occurrence of the bidder name of interest. The entire row will be highlighted and you can review item details by scrolling left or right.

Viewing Reservations for a Name

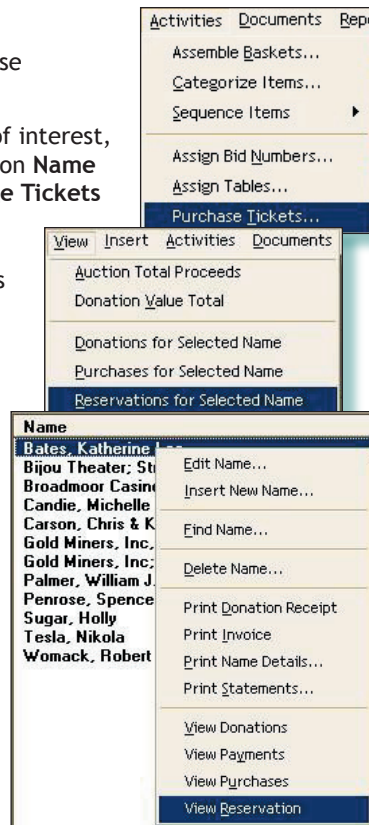
Persons who have purchased tickets for your event have a **Reservation**, and are **Guests**. This technique displays reservations on screen. For printed information, see *Statements*, *Printing Full Name Details*, and *Reservations/Tickets Report*.

To view reservations for a guest:

1. **Select/highlight** the name whose reservation you'd like to see.
2. Right click and **Edit** the name of interest, then click **Reservation Details on Name Entry**. Click **Purchase / Change Tickets & Assign Guests** to view ticket purchase details. Number attending and entrée selections are shown here.

You may also:

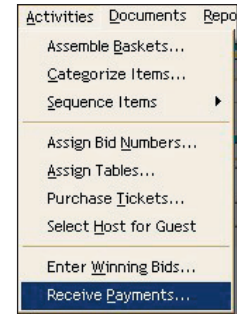
1. Click **Activities, Purchase Tickets**.
or
Click **View, Reservations for Selected Name**.
or
Right-click the name of interest, and click **View Reservation**.
2. **Reservations / Purchase Tickets** is displayed for the selected name. **Ticket Purchase** is shown. **Add Guests** is disabled unless the person has purchased tickets for more than themselves and their immediate party.



Viewing Payments for a Name

This technique is for viewing payments on screen. For printed information, see *Statements*, *Printing Full Name Details*, and *Reconciliation Report*.

1. Click **Activities, Receive Payments**.
or
Edit the name of interest, and click **Payments & Register on Name Entry**. This button is disabled when the person does not have purchases or payments.
or
Right-click the name whose payments you'd like to see, and select **Receive Payments**.
2. **Enter Payments** is shown for the selected name.



You can enter and void payments on this screen. See *Receiving Payments for Reservations*.

Void	Date	Time	Item	Purchase	Payment	Balance
	29-Nov-01	10:27 AM	Just Build It!	\$250.00		\$250.00
	08-Dec-01	11:09 PM	MC 4777 / DLE		\$250.00	\$0.00

Payments & Reservations (Alternate Look)

Payments, Pledge Bids and Reservations are displayed on Transactions Grid View.

1. Click View, Transactions.

or

Click the All Payments and Pledges in Grid View button, which shows a credit card and a grid.



2. Click any heading to sort by the desired column.



Pikes Peak SnowBall - Shared Access (C:\Auction)

File Edit View Insert Activities Documents Reports Review Settings Auctionpay Help

Transactions

Return to Main Screen

Record Type	Name	Detail	Amount	Status	Enl ^
PAYMNT	Bates, Katherine Lee	MC 4777 02/05	\$250.00		De
PLEDGE	Bates, Katherine Lee	Live 0004 Just Build It!	\$250.00		No
PAYMNT	Bijou Theater; Stratton, Myron	AmEx 65701 05/06	\$35.00		De
PLEDGE	Bijou Theater; Stratton, Myron	Silent 1005 Ride on the Denver & Ri...	\$150.00		De
PLEDGE	Bijou Theater; Stratton, Myron	Silent 1005 Ride on the Denver & Ri...	\$150.00		De

Status 12/23/2003 5:01 PM

