

Item Entry

Getting Oriented

This chapter covers essentials of entering items as your gathering team brings them in. If you've already entered some items in a spreadsheet or other program, use **Import** to bring these items into **Auction!** Then continue adding items with the techniques described here.

Once your items have been entered, you'll continue with **Event Preparation for Items** to categorize items, sequence items for your catalog and auction sections, and assemble items into baskets.

Adding a New Item

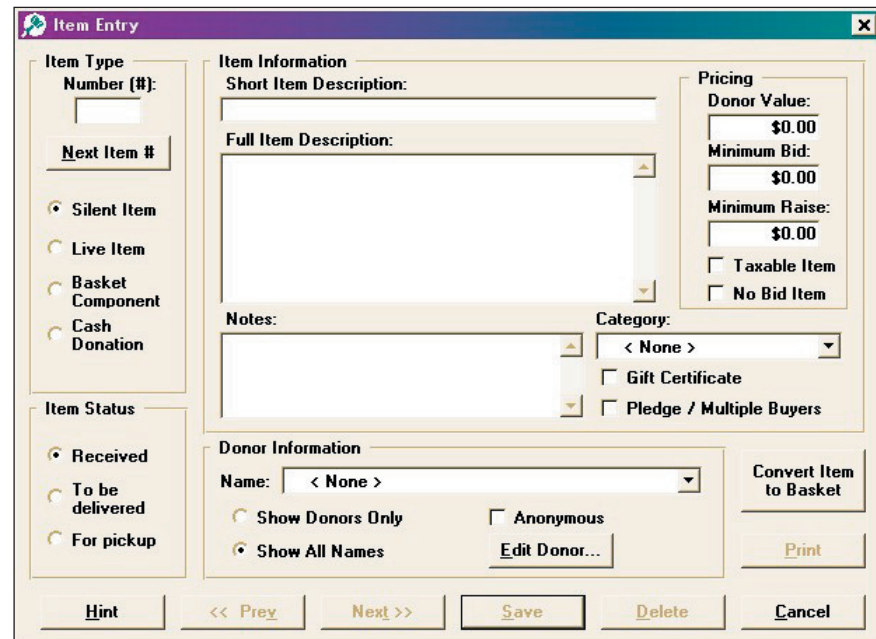
- Click **Insert, Item**.
or
- Click the **New Item** button above the item list display.
or
- **Right-click** anywhere in the item list display, and select **Insert, New Item** from the shortcut menu.
- *or*
- After completing a new item entry, click **Next** on **Item Entry**. This will save the current item record, and clear the screen so you may enter a new item.
or
- While reviewing items by clicking **Next** (or **Previous**), continue past the end (or beginning) of the items. A blank screen for a new item will be displayed.



Category	Item #	Short Description
Sports Equipment	1001	Snowboard
Trips & Travels		Silway
Home & Garden		(BASKET)
Trips & Travels		sson
Dining In & Out		ver & Rio ...
Door Prize		ce
Trips & Travels		ay Trip (B...

Tip

Be sure to try the various ways to add new items. Depending on what you're doing at the moment, different techniques may be more convenient.



Item Type & Number

Each item must have an **Item Number**, **Type** and **Short Description** before saving.

1. Type an item number in the Number (#) field. Item Numbers may be up to four digits, and may not include alphabetic characters.
or
Tab once to **Next Item #**. The button will be highlighted with a dashed line and a heavier border. Press the space bar to automatically enter the next item number.
or
Click **Next Item #** with your mouse.
2. Tab once, to the Item Type options. Use the arrow keys to change the selected type, or click the desired type with your mouse.

The screenshot shows a form with the following elements:

- Item Type** section with a **Number (#):** field containing '1002' and a **Next Item #** button.
- Radio button options for **Silent Item** (selected), **Live Item**, **Basket Component**, and **Cash Donation**.

When a new item screen is displayed, **Previous**, **Next**, **Save**, **Delete**, and **Print** are disabled. They are not applicable to this item, until it has a number and short description. When you select **Basket Component** or **Cash Donation** item type, other options may also be disabled since they don't apply to these Item Types. Click **Hint** to find out which options are not available.

Tip

Don't worry a lot about the initial item numbers as your items come in. You may easily Sequence them as a group, by category, or individually later in the process. It's more helpful to keep the item numbers distinct (for clarity) between Silent, Live, Basket Components, and Cash Donations.

Tip

If more than one person on your team will be entering items, assign each teammate a different range of available item numbers. Also, do not change item numbers in any dataset without first reading Merge implications.

Item Status

1. Tab to the **Item Status** section.
2. Click on the desired status, or use the arrow keys to change the selection.

You can run **Reports** by **Item Status** for follow-up on missing items by your volunteers.

The screenshot shows a menu titled **Item Status** with three radio button options:

- Received** (selected)
- To be delivered**
- For pickup**

Item Information

This section is the heart of your item information. Your bid sheets, catalog, tent cards, and placards will include this information. Gift certificates, pledge items, and categories may also be identified here.

1. Tab to **Short Item Description**.
2. Enter a catchy name for your item if possible, or at least a plain and informative short description. You can change it later. **Short Item Description** serves as the title for your item.

The screenshot shows the **Item Information** form with the following sections:

- Short Item Description:** A text field containing 'Ride the Cog Railway'.
- Full Item Description:** A text area containing '4 Passes for this awesome ride to the top of Pikes Peak.'
- Notes:** A text area containing 'Mr. Barr has offered a second set of tickets as a door prize at the Summer Ice Cream Social.'

Tip

If you have purchased the upgrade to enable the Auction! - cMarket link for the online portion of your event, items will appear on the cMarket website in alphabetical order by the Short Item Description, not in numerical order, so name the items as you would like them to appear.

3. Tab to **Full Description**.
4. Enter the details of your item, as appealingly as possible.

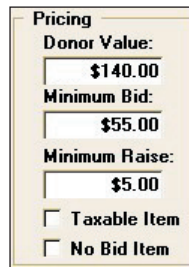
Tip

Be sure to include descriptive information, such as size and color, creator or brand, etc. It is very important to include any restrictions or specific redemption criteria, such as “Valid through Dec 31, 2006” to prevent misunderstandings and disappointment for your buyers and donors.

5. Tab to **Notes**.
6. Enter any optional notes for yourself or volunteers, such as “Primary contact is John, but ask for Lani when you pick up the vase.”

Item Pricing

1. Tab to **Donor Value**.
2. Enter the value of the item, as best you know. Sometimes the donor will specify a value or you might need to research it. If the value of the item cannot be estimated, such as “Dinner with the Pastor,” leave it zero. In the catalog and on bid sheets, this item’s value will be shown as “Priceless!”
3. Tab to **Minimum Bid**.
4. Enter a minimum or opening bid for your item. Typical minimum bids range from 25% to 40% of item value; sometimes there are good reasons to go above or below this range.
5. Tab to **Minimum Raise**.
6. Enter a minimum raise for the item. Typical raises are from 3% to 10% of item value, with most near 5%.



The screenshot shows a 'Pricing' dialog box with the following fields and options:

- Donor Value:** \$140.00
- Minimum Bid:** \$55.00
- Minimum Raise:** \$5.00
- Taxable Item
- No Bid Item

Tip

It is common to exclude entering Minimum Bid or Minimum Raise for Live Items, since the auctioneer will handle these. Typically, you would also skip these elements for Basket Components and Cash Donations.

Tip

Set Minimum Bid and Minimum Raise with easy arithmetic in mind, even when you are using pre-printed bid amounts on your bid sheets. It can be distracting to have a \$25 item with a \$7.50 minimum bid and \$1.25 increments.

Tip

Set Minimum Bid and Minimum Raise so that you can have spirited bidding, even as the item approaches or exceeds full Donor Value during the silent auction. When Minimum Bid or Minimum Raise is too high, it will slow down bidding.

7. Tab to **Taxable Item**.
8. Click to check or un-check the box.
or
Press the space bar to check or un-check the box.

The default setting for Taxable status should be set based on your state’s regulations and the typical items you receive for your event. Select the default in **Settings, Event Preferences, Sales Tax**. You may change Taxable status for specific items at any time.

Caution

Do not assume all items sold by your non-profit are not subject to sales tax. Every state has its own, sometimes complex, regulations for sales of items by non-profits. Tax-exempt status for non-profits applies to purchases by the organization, not sales. Many states will pursue legal and financial remedies against non-profits who are not in full compliance with local and regional laws.

9. Tab to **No Bid Item**.

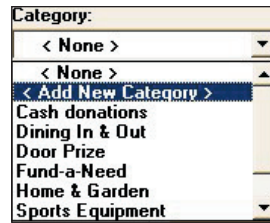
No Bid or Giveaway Items are items that, at the last moment, you decide to remove from the auction, or give away as a door prize or appreciation gift. This checkbox indicates that you don’t expect to receive a winning bid for this item.

10. Click to check or un-check **No Bid Item**.
or
Press the space bar to check or un-check **No Bid Item**.

Item Category

Categories are useful for organizing your event and your catalog. You may add as many categories as you like. You may prefix category names with “1.”, “2.” or “A.”, “B.”, or even “Section I - ”, etc. to control the sequence in your catalog.

1. Tab to **Category**.
2. **Type** the first letter or two of the category to select.
or
Click the dropdown arrow and scroll to the category of interest.
or
Tab again to skip Category for now.
or
Click **<New Category>** to add a new category name. Enter the new category name, which will be spell-checked for you.



Tip

*It may be easier to skip category when entering individual items, and use **Activities, Categorize Items** later. Once you've seen the complete list of items, you can organize them rapidly with this feature.*

Note

*A category **MUST** contain at least one item or the category will be lost when you close the project. Therefore, don't start a project and enter lots of categories for your data entry team. Give them a list and let them add the category name when they actually enter an item that fits in that category.*

Tip

*You may end up with different versions of the same category by independent data entry before merge, or you may simply wish to change the name of a category. To clean up these variations, choose **Activities, Categorize Items**. Select the category you wish to change and remove all items from it. Then create the new category name and add the items back into it. When you close and re-open **Auction!**, the old category will be gone.*

3. Tab to **Gift Certificate**.
4. **Click to check or un-check** the box.
or
Press space bar to check or un-check the box.

When **Gift Certificate** is checked for an item, “**CERT**” will be indicated next to the item number on the bidder's invoice at the event. This indicates the item to be retrieved is a gift certificate, ticket, or coupon, and not a tangible item. Many auctions handle gift-certificate pickup separately due to the value and portability of these documents.

You may print **Gift Certificates** for all items, or only for items flagged as **Gift Certificates in Documents, Gift Certificates**.



5. Tab to **Pledge / Multiple Buyers Item**.
6. **Click to check or un-check** the box
or
Press the space bar to check or un-check the box.

For more details on the **Pledge / Multiple Buyers** check box, see **Entering Duplicate Items Quickly**.

Tip

*The pledge bid/multiple buyer feature may be used for an item that will be sold to more than one guest. This would include general calls for pledges, such as **Fund-a-Need, Give from the Heart, Cash Call, and Raise Your Paddle**. This feature is not available for **Basket Items**.*

*The pledge bid/multiple buyer feature can be used for party bids, where two or more guests purchase a part of the same item, such as a **BBQ for eight** or a **sailing trip for six**.*

*It can be used when you have many of the same item for sale, for instance **20 CD's of the youth choir** or **all of the centerpieces at your event**. It can be used for **beverage tickets, to be spent at the bar**.*

*Winning bid dollar amounts for **pledge/multiple buyer** items may be **identical for all purchasers** or can differ.*

Donor Selection for an Item

1. Tab to **Name** in the **Donor Information** section of the Item Entry screen.
2. Select **Donor Name:**
 Type the first letter or two of **Company** or **Last Name** of the Donor. You can use the arrow keys to move up and down in the list when you are close to the desired name.
 or
 Click the dropdown arrow and scroll to the Donor's Name.
 or
 Click <Add New Donor> to open a new Name Record. See *Adding a New Name* for more details.
 or
 Skip **Donor Name** and leave it blank.

Show Donors Only
 Show All Names
3. Tab to **Show Donors Only** or **Show All Names**.

Select the desired option. The default is **Show All Names**; you may switch to **Show Donors Only** to work only with existing donors.

The **Anonymous** check box is covered in the next section.

To review or revise Donor contact information:

1. Tab to **Edit Donor** and press the space bar.
 or
 Click **Edit Donor**.
2. For donors already entered, you may revise any fields **except** key fields. See *Unique & Duplicate Records* for details on key fields. This assures correct linkage of all items to their respective names. If you notice a misspelling in a key field, such as **Last Name** or **Company**, save the current item first, then edit the name from the **Donor Names** screen.

Anonymous Donors

The **Anonymous** option is used when you know the donor's name and will need to thank them later, but the donor does not wish to display their name with this specific gift.



Tip

Anonymous status applies to the item(s) for which it is checked, not to those donors in general.

1. Tab to **Anonymous**.
2. Click to check or un-check the box.
 or
 Press the space bar to check or un-check the box.



Tip

When you don't have a donor name, you can still create a graceful catalog and bid sheet. Enter a Company Name such as "Friends of the Children's Museum" as a substitute for unidentified donors.

Tip

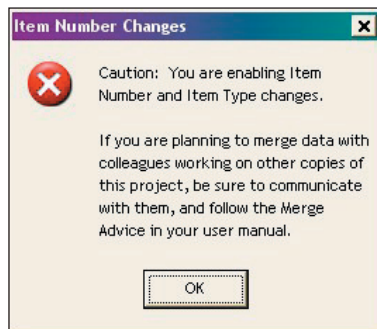
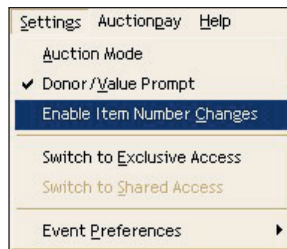
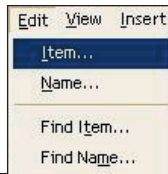
You can use "Friends of Westside Elementary" as Company, and different individual's names for First and Last Names. Company name will print in the catalog and on bid sheets; you will still have unique individual names for thank you letters.

Editing Existing Items & Enabling Item Number/Type Changes

To edit, review or revise an item, it must be displayed.

1. **Double-click** the item.
or
Select/Highlight the item. Click **Edit, Item.**
or
Right-click the item, then select **Edit Item.**
2. **Item Entry** is shown. Most fields may be edited.
3. If you need to change item numbers or item types, click **Settings, Enable Item Number Changes** before editing.
4. A warning message is displayed when you enable item number changes.

Category	Item #	Short Description
Sports Equipment	1001	Snowboard
Trips & Travels	1002	Ride
Home & Garden	1003	Gard
	1004	Gold
Trips & Travels	1005	Ride
Dining In & Out	1006	Melo
Door Prize	1008	Tabl
Trips & Travels	1009	Cripp



Caution

Multi-user customers and network customers who merge data from other team members should exercise caution in changing item types or item numbers. Merge all data **BEFORE** changing item numbers or item types. All data entry should halt while one team member changes data. Backup this dataset and **RESTORE** (not merge) this dataset to all other team member's computers.

Tip

Click **Hint** to learn how to change disabled options.

Converting an Item to a Basket

Individual items are made up of a single gift, from a **single** donor. Baskets, or more specifically, Basket Containers, are Live or Silent Items, comprised of gifts from two or more different donors. The container itself does not have an intrinsic donor or value.

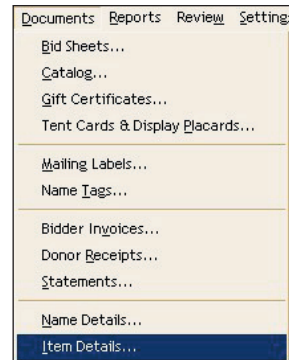
Occasionally, you might begin your basket assembly's description in the standard Item Entry form. To retain this work, and yet be able to add component items from specific donors, it must be converted to a basket container.

Converting items to basket containers is covered in **Baskets**.

Printing Full Item Details

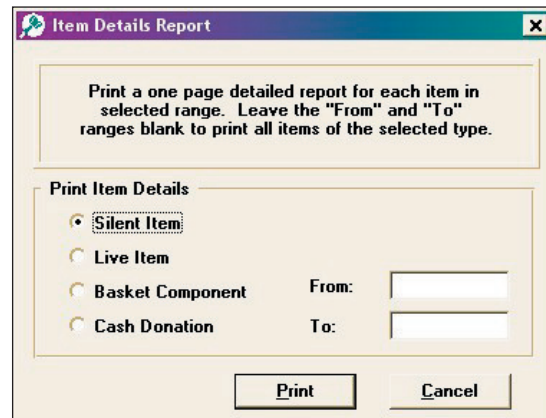
To print a full page report for a particular item's information:

- Tab to **Print** and press spacebar.
or
- Click **Print**.
or
- Click **Documents, Item Details**.



You can print a detailed one-page information sheet, **Item Details**, for any item. It shows donor information, pricing details, and purchasing details (if the item has been sold). **Item Details** can be printed for one item at a time, or for a sequence of items.

See *Documents, Item Details* for more information and a sample report.



Hints

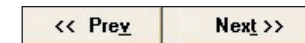
At times, certain options or buttons may be disabled on **Item Entry**. Click **Hint** for an explanation of why these particular buttons are disabled. These hints are updated to reflect current specific situations.

For example, when there is a winning bid for an item (not visible on the item entry screen,) you will not be able to delete the item.

Moving Through Items: Next & Previous

Next and **Previous** facilitate item review and editing.

When **Editing Items**, **Next** and **Previous** **Save** changes you have made, and display the next (or previous) item in sequence. There is no need to click **Save** or **Cancel**, and then open the next item for review.



When **Reviewing Items** sequentially without making changes, **Next** and **Previous** do not save items. They simply move on to the next item in sequence.

When **Adding New Items**, or at the end of the list, **Next** and **Previous** display a new item entry screen. **Next** and **Previous** are disabled until you enter an item number and short description.

Saving an Item

When you complete data entry, you are ready to save the item. Saving an Item stores it in the dataset. It is part of your project until you delete or overwrite it. You can revise information later.

1. Click **Save**.
or
Tab to **Save** and press the space bar.
or
When **Save** has a darker border, press **Enter** on your keyboard. (The dark border indicates that this action will be taken when you press Enter.)

Save closes **Item Entry**. To keep the screen open, see *Moving Through Items: Next & Previous*.

Deleting an Item (from Item Entry Screen)

1. Open the item to be deleted; verify this is the correct item.
2. Click **Delete**.
3. Confirm deletion by clicking **Yes** or **No**.

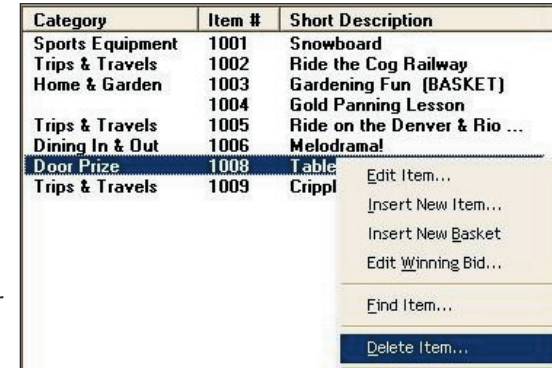


If **Delete** is disabled, click **Hint** to learn the reason. Take appropriate action to remedy this if you still need to delete the item.

Deleting an Item (from Main Screen)

1. Select/highlight the item to delete.
2. Right-click the item to display the shortcut menu.
3. Click **Delete Item**.
4. Confirm deletion by clicking **Yes** or **No**.

Category	Item #	Short Description
Sports Equipment	1001	Snowboard
Trips & Travels	1002	Ride the Cog Railway
Home & Garden	1003	Gardening Fun (BASKET)
Trips & Travels	1004	Gold Panning Lesson
Dining In & Out	1005	Ride on the Denver & Rio ...
Door Prize	1006	Melodrama!
Trips & Travels	1008	Table
Trips & Travels	1009	Cripp

A context menu is displayed over the table, listing several actions: Edit Item..., Insert New Item..., Insert New Basket, Edit Winning Bid..., Find Item..., and Delete Item... The "Delete Item..." option is highlighted with a dark background.

When the item cannot be deleted, the reason is indicated.

Take appropriate action to remedy this if you still want to delete the item.

Cancelling Data Entry

While you are editing an item, you might accidentally erase or change more than you intended. When you **Cancel**, changes are not saved, and the item is unchanged.

1. Click **Cancel**
or
Type **ESC** (for Escape.)
2. Confirm that you wish to exit this record without saving by clicking **Yes** or **No**.



Caution

*Multi-User and Network customers should explicitly click **Cancel** rather than **Save** when reviewing and “just looking” at items. **Save** updates the Date/Time stamp, which affects **Merge**. **Cancel** does not update Date/Time.*

Entering Duplicate Items Quickly

When you have several copies of an item for your auction, you have two choices for entering these items into your project.

Duplicate Items are used when you have two or three of an item, and don't necessarily want to sell them all at the same time, or might use one or more as a component in a basket, or have already entered a winning bid for the first copy of the item. Duplicate items will have a unique **Item Number** for each copy of the item.

Pledge/Multiple Buyer Items are used when you will sell a larger quantity of the item, at a fixed or variable price. Pledge/Multiple Buyer Items are sold under a single, common **Item Number**.

Pledge/Multiple Buyer Items are well suited for items such as "4th of July Barbecue for 20 people" or "Fishing Trip with the Principal for 10 children." They are also designed for Live Auction cash solicitations (such as a new Mobility Van for a hospice or Computer lab for a school.) These solicitation efforts are called "Raise your Paddle," "Pledge for the (specific need)," "Give from the Heart," "Fund-A-Need" or even simply "Cash Call."

Once you create a Pledge/Multiple Buyer Item for this item, you can enter as many bids as needed quickly.

Pledge/Multiple Buyers Items are also handy for event night purchases such as "Beverage Tickets."

Duplicate Items

1. **Create** and **Save** the first copy of the item.
2. **Highlight** the item to duplicate on the Item list display. Do not edit/open the item.
3. Click **Insert, Duplicate Item**.
4. The new item will be shown. All fields will be duplicated, except Item Number.
5. **Enter** a new **Item Number** for the item.
6. **Save** the duplicate item.

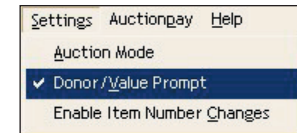


Note

Duplicate Items are not available for Baskets.

Donor/Value Prompt

If you do not have a donor name or donor value for the item to be duplicated, you can turn off the donor prompt before creating duplicate items. This enables you to enter duplicate items more quickly, since the prompt will not pop up each time you click Save. Click **Settings, Donor/Value Prompt** to turn this prompt off or on.



Pledge/Multiple Buyer Items

1. **Create** an item.
2. Click **Pledge / Multiple Buyers** for the item.
3. **Save** the item.



Note

Pledge / Multiple Buyer Items are not available for Baskets.

