

Review Checklists

The **Review** menu displays quick summary information on exceptions you may need to handle for your event. Its first three checklists (guests and reservations) are designed for pre-event tasks; the next two checklists (winning bids and invoices) during your event. Guests with Nonzero Balance can be helpful before, during and after your event.

Tip

These checklists are not printable; many have a Report button. When you click Report, you may print an equivalent report (usually containing additional detail.)

Alternatively, you can press the Alt key while clicking on Print Screen or PrtScn key on your keyboard. This copies the image to the Windows™ clipboard. You can paste the image on to a word processing document and print the document.

Guests without Bid Number

All guests attending your event must have a bid number to bid on silent and live auction items. **Guests** include:

- People who have **Number Attending** of more than zero.
- People who have purchased ticket(s).
- People whose tickets were purchased by someone else.

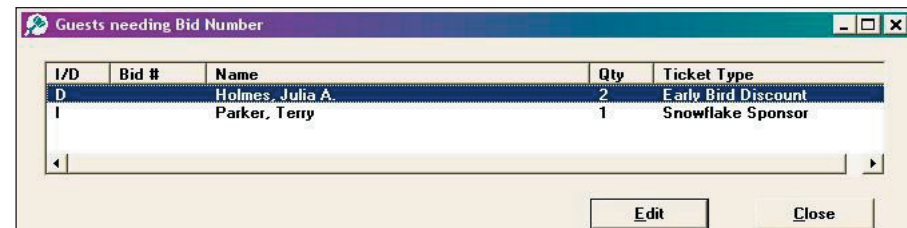
To ensure all guests have a bid number:

1. Select **Review, Guests without Bid Number**.
2. **Guests needing Bid Number** is displayed.

The display indicates **I (Invitee)**, **D (Donor)** or **I/D (both)** in the first column. The name is listed, and number attending. If tickets have been purchased, then ticket type is displayed. If no tickets have been purchased, the last column shows **-Guest-**.



3. **Double-click** a name to assign a bid number
or
Select/highlight a name and click **Edit**.



I/D	Bid #	Name	Qty	Ticket Type
D		Holmes, Julia A.	2	Early Bird Discount
I		Parker, Terry	1	Snowflake Sponsor

To assign Bid Numbers for guests without bid numbers, click Activities, **Assign Bid Numbers**.

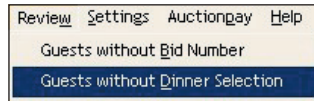
Guests without Dinner Selection

When not using **Dinner Selection** (entrée choices), this review list can be ignored.

Persons whose Number Attending is more than zero have indicated they'll attend your event. When using the Entrée Selection feature, for your caterer or to organize potluck/covered dish dinner choices, you may find it helpful to review this option.

To ensure guests each have entrées selected:

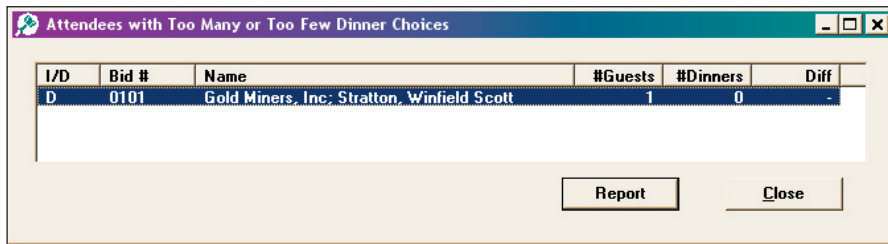
1. Select **Review, Guests without Dinner Selection**.



Guests with Too Many or Too Few Dinner Choices is displayed.

This screen shows **I (Invitee)**, **D (Donor)** or **I/D (both)** in the first column. The name is listed, along with number attending and number of entrée selections made.

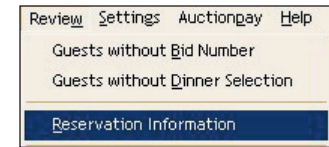
2. Click **Report** to print this information and associated details.
3. Click **Close** to return to the Main Screen. Correct guest entrée selections on Name Entry.



Reservation Information

This review menu option applies to organizations selling tickets to their event. If ticket sales are not being recorded, you can ignore this review list.

1. Click **Review, Reservation Information**.
2. **Reservation Review** is displayed. There are three tabs, each displaying a particular exception condition.

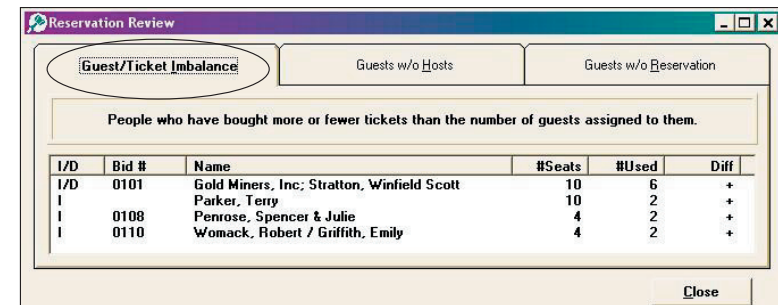


Revise entries for these guests on **Name Entry**.

Guest/Ticket Imbalance

The first tab is **Guest/Ticket Imbalance**. This screen shows Invitee/Donor status in first column. Bid number and name are listed next. **Number of Seats (# Seats)** shows how many tickets have been purchased for their reservation. **Number Used (# Used)** indicates the total Number Attending for this person and their specified guests.

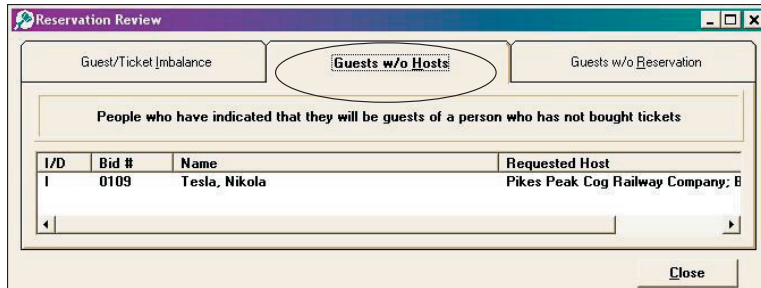
Difference is positive when there are extra reservations/ticket purchases still unused, and negative when too many attending have been assigned to this reservation.



Guests Without Hosts

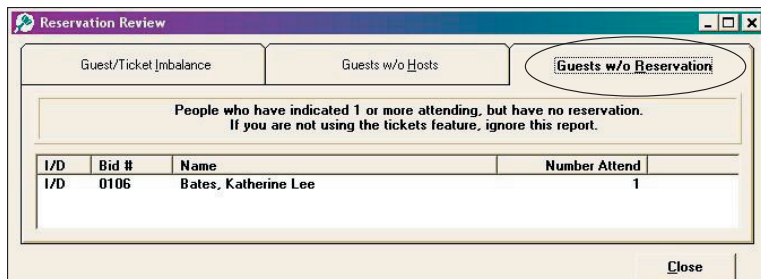
The second tab is **Guests without Hosts**. When a person's name has been assigned to a host, and they have a bid number or number attending more than zero, but the host has not purchased additional tickets for guests, these guests are shown here. These guests may

need to be detached from that host (see *Removing Guests from a Host*) or may need to purchase their own tickets, or their hosts may still need to purchase tickets.



Guests Without Reservation

The third tab is **Guests without Reservation (Guests w/o Reservation)**. Persons with Number Attending more than zero and who have a bid number, are **Guests**. Guests on this list have not yet purchased tickets to your event.



When you are not recording ticket sales, ignore this review checklist.

Items without a Winning Bid

As your event is coming to a close, you'll want to ensure that no bid sheets have been misplaced, and all winning bids are entered. This review option assists you in verifying all items have bids.

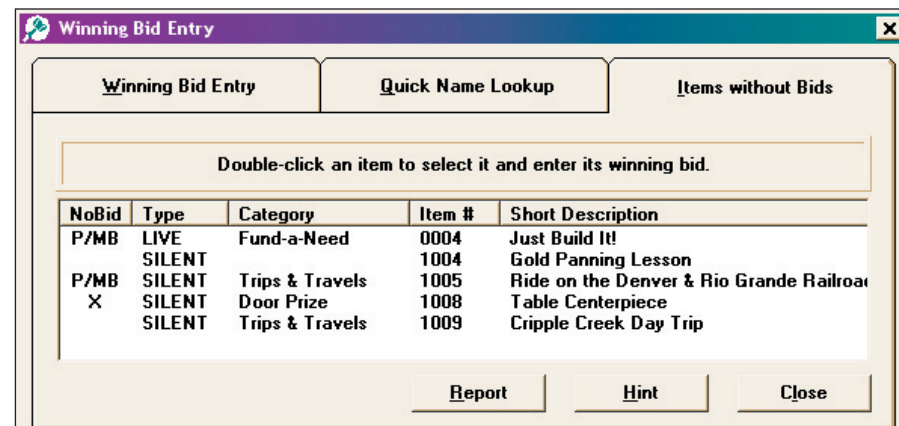
1. Click **Review, Items without Winning Bid**.
or
Click **No Bid Entered** on the main screen.
2. **Winning Bid Entry** is shown, on its third tab, **Items without Bids**, rather than the more familiar first tab, **Winning Bid Entry**.
3. **Review** items shown.



Pledge and **Multiple Buyer** items always appear here, since more bids can be entered for these at any time; you can safely ignore these items. Pledge/Multiple Buyer items are indicated **P/MB**.

Items with an **X** in **NoBid** have been marked as **No Bid Item** on Item Entry. You don't expect to sell these items (e.g. door prizes,) so you can safely ignore these.

4. Review any other items on this list.
5. When a winning bid will not be entered for a particular item in the list (door prize or perhaps there are simply no bidders for this item), double-click the item, returning to **Winning Bid Entry**.



6. Check **No Winning Bid Received (Rec'vd)**. This displays an X next to the item, indicating your awareness that it will not have a bid.

Some items may simply have been missed in the entering of the winning bids on the bid sheets.

7. Find their bid sheets and double-click each item to go to **Winning Bid Entry**.

Enter a winning bid for an item, and it is removed from this list.

Invoices Needing to be Printed

As your event comes to a close, review this list to ensure all invoices have been printed.

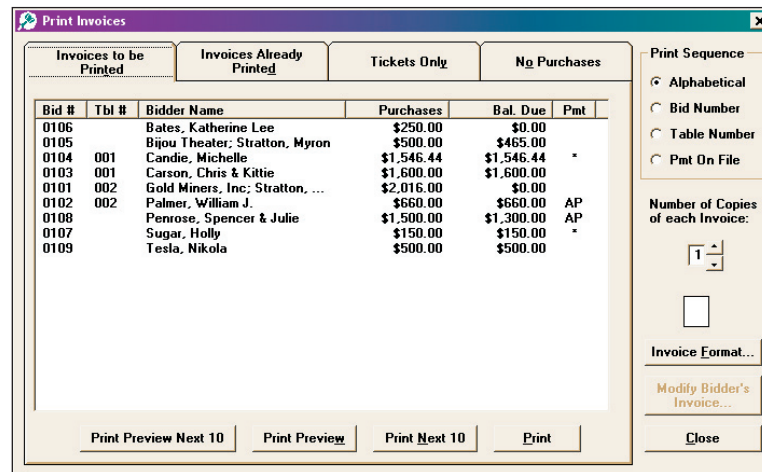
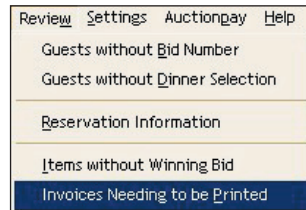
1. Click **Review, Invoices Needing to be Printed**.

or

On the main screen, click **No Invoice Printed Yet**.

Invoices to be Printed tab on **Print Invoices** is displayed.

2. When guests purchase an item, or a bid amount is changed, their name is added to this list.



3. Click **Print** or **Print Next 10** to send invoices directly to the print queue. Click **Print Preview** or **Print Preview Next 10** to preview invoices prior to printing.
4. Invoices that have been printed move automatically to **Invoices Already Printed**. Previewing the invoice and then cancelling does not remove guests from **Invoices to be Printed**.

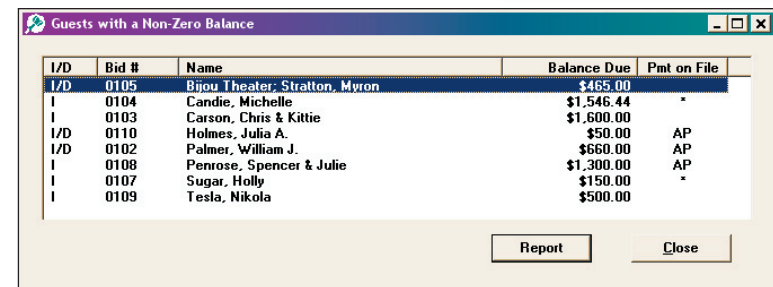
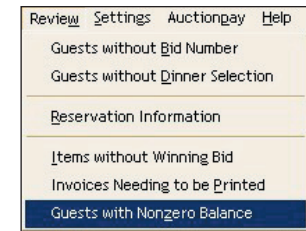
Guests with Nonzero Balance

Guests with Nonzero Balance highlights guests whose payment has not been recorded for tickets/reservations and/or auction items. Guests whose payments do not equal the total of tickets and items purchased is listed here.

To display guests whose balance due is not zero:

1. Click **Review, Guests with Nonzero Balance**.

The screen displays guests whose payments do not equal their total ticket & item purchases. Parentheses () indicate a negative balance due, that is, more has been paid than was owed.



2. Click **Close** to return to the main screen.
3. Click **Report** to print a detailed listing of these same guests. **Reports, Bidder Names** is displayed, with the appropriate options selected.