

Setting Event Preferences

Event Preferences govern behavior of many aspects of your project. Some settings affect output, such as the font selected for reports. Others affect actual data records, such as name categories or ticket types for sale.

Event Preferences may be specified when creating a new project, or later.

Event Preferences are handled very specifically during Merge. See *Merging Data Together in Auction!* for more details. Network edition users running in Shared Access mode should change Project Preference settings with care.

Name Info | Sales Tax | Tickets | Dinner & Tables | Reports & Fonts | Project Name | Spell Check

Use Name Categories for subgroups. Mailing lists and reports may be run by name category. Name categories are optional.

Name Categories:

1: Alumni	5:
2: Parishioners	6:
3: Friends	7:
4:	8: Thank You Needed

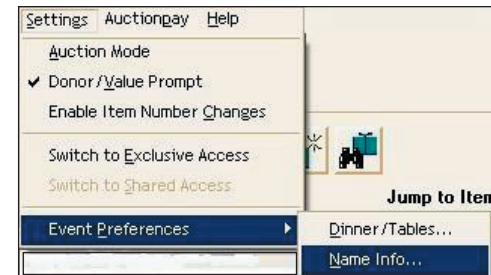
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Name Info

Name Categories are used for sorting and for creating specific “populations” for mailing labels and reports.

1. Click **Settings, Event Preferences, Name Info**.

2. **Enter up to eight Name Categories.** Examples of categories might be parishioner, alumni, school family, grandparents, friends, benefactors, or sponsors.



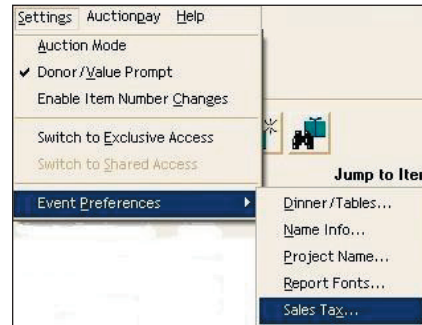
You can assign your Invitee, Bidder, and Donor names to one or more of these categories.

Name Categories are stored in the dataset as simply Category #1 or Category #2, so the Invitee or Donor name is simply linked with the first category or the second category. This means you may change the spelling of the individual categories, but do not change the order once you have assigned any names to the categories.

Sales Tax

Many non-profit organizations assume that their sales are not taxable. However, sales tax exemptions usually apply only to **Purchases** by non-profit organizations, not necessarily the **Sales** that they make. In many states, some or all of non-profit sales may be taxable. Please check your state's regulations to ensure compliance with the law.

1. Click **Settings, Event Preferences, Sales Tax**.
2. **Event Preferences** is displayed on the **Sales Tax** tab.
3. Select **Taxable** or **Not Taxable** to set the default preference for new items as they are entered. You may change the taxable setting on any individual item on each **Item Entry** screen.
4. Enter **Sales Tax** rate for your state or locality. For example, if your sales tax rate is 3.2%, enter the number 3.2. Sales of all items marked as taxable will be multiplied by .032 to calculate the proper sales tax.
5. Enter the **default state or province** to auto-fill in each new **Name Entry**.



Name Info	Sales Tax	Tickets	Dinner & Tables	Reports & Fonts	Project Name	Spell Check
<p>Sales Tax for Items: Many non-profits assume that their SALES are not taxable. Sales Tax Exemptions usually apply to PURCHASES by the non-profit. NOT necessarily Sales. In many states, at least SOME items are taxable. Please check your state's regulations. Item taxable status may be adjusted individually, and this preference may be changed.</p>						
Default taxable status for new items: <input checked="" type="radio"/> Not Taxable <input type="radio"/> Taxable		Sales Tax Rate (%) <input type="text" value="3.2"/>	Default State / Province for New Names: <input type="text" value="CO"/>			
<input type="button" value="Reset This Page to Last Saved Value(s)"/>		<input type="button" value="Hint"/>	<input type="button" value="Next >>"/>	<input type="button" value="Save"/>	<input type="button" value="Close"/>	

Ticket Types

Auction! facilitates setting up **Ticket Types** for your event. Even simple events often need more than one ticket type. For instance, your school auction may have only one ticket price. However, there might be a few complimentary tickets given away and teachers may attend on a “two for the price of one” basis.

Creating a ticket type for each purchase option gives you the clearest tracking of receipts and meal counts for your caterer.

Adding Ticket Types

Active ticket types are shown in the upper box. The **Ticket Name** is listed first. The next column indicates **Group** or **Individual** ticket type. The third column shows **Number of Guests per Ticket**. This is always “1” for individual tickets. The next column is **Price**; you may need to scroll to the right to see **Value**.

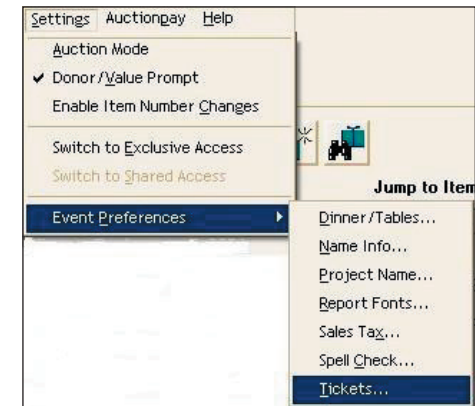
You may sort by any of these columns by clicking the heading above the column.

1. Click **Settings, Event Preferences, Tickets**.

2. The **Event Preferences Screen** is displayed on the **Tickets** tab.

3. Select **Individual** or **Group** ticket type.
Individual tickets:
 Quantity purchased is equal to the number of guests/meals.
Group tickets:
 Quantity purchased is not equal to the number of guests, e.g. 1 Table = 10 Guests, or 1 Teacher Two-for-One = 2 Guests.

4. Type a name for the ticket and press Tab. Each ticket type must have a unique name; ticket type names that have been voided may not be reused.



- For Individual tickets, **Number of Guests per Ticket** is automatically set to 1. For **Group** tickets, type the number of guests per ticket and press **Tab**.
- Enter **Purchase Price** for the ticket type and press **Tab**.

Ticket Name	Group/Ind	# Tickets	Price
Complimentary	Indiv	1	\$0.00
Early Bird Discount	Indiv	1	\$35.00
Holly Sponsor	Group	10	\$500.00
Regular	Indiv	1	\$50.00
Snowflake Sponsor	Group	10	\$1,000.00

- (Optional) Enter **Fair Market Value** for the ticket type. This is reflected on Invoices and Statements when part of the ticket price is a tax-deductible contribution.
- Click **Add Ticket Type to List**. The new ticket type is added to the list, in alphabetical order.

Removing Ticket Types

Sometimes you will need to remove a ticket type. Ticket types may be removed only if there are no active ticket purchases for the ticket type. **Active** ticket purchases are purchases that have not been voided.

- Click **Settings, Event Preferences, Ticket Types**.
- Click to highlight the ticket type to be voided.
- When **Void Selected Ticket Type** is disabled, one or more guests have purchased the selected ticket type. To void ticket types still

in use, void the purchases for these tickets, then void the ticket type. See **Voiding Ticket Purchases**.

- Click **Void Selected Ticket Type**. Confirm **Yes** or **No**.

Dinner & Tables

Entrée Names

Some events are able to offer guests a choice of entrées. This feature allows you to record guest preferences. If no entrée names are specified, guest meal counts are simply recorded as “unspecified.”

- Click **Settings, Event Preferences, Dinner/Tables**.
- Enter the names of your entrée selections. The name or spelling of an entrée selection may be changed later. There is a limit of four entrées.

Tip

*Do not change relative sequence of entrée names after any guest preferences have been stored. **Auction!** stores these preferences for each guest as simply Entrée 1, Entrée 2, etc. and respective quantity. It does not store entrée names with each person's record.*

Tip

You can use entrée names to reflect dishes that guests will bring if your event is a potluck/covered dish dinner. You might select entrée names such as: main dish, salad/vegetable, breads, and desserts.

Table Setup

Auction! allows you to specify a number of tables for your event and typical number of guests per table. You may leave these blank if desired.

The program will permit you to seat more or fewer guests at a specific table; it will notify you that the table is “over capacity” or “has seats available.”

1. **Type Number of Tables.** *Auction!* will check to make sure that no guests are already seated at a higher numbered table. The maximum table number is 999.
2. **Type Number of Guests per Table.** The maximum is 99.

Report Fonts

We recommend that you select a Report Font that is clear, easy to read, and installed on most Windows™ computers.

1. Click **Settings, Event Preferences, Report Fonts.**
2. Select an easily readable Report Font (e.g. Arial, Tahoma, or Times New Roman) on the left side of the screen.
3. Click **Save**, then **Close**.

You can set fonts, margins, and layouts for your other event documents on this screen or you can make your choices from the document screens.

Project Name

You may change the project name after the project has already been created.

1. Click **Settings, Event Preferences, Project Name**.
2. **Type** the desired project name in the **Event/Project Name** box.
3. Click **Save, Close**.

Spell Check

Spell check is a convenient way to ensure that your catalog, bid sheets, and other event documents look their best.

Auction! checks the following fields:

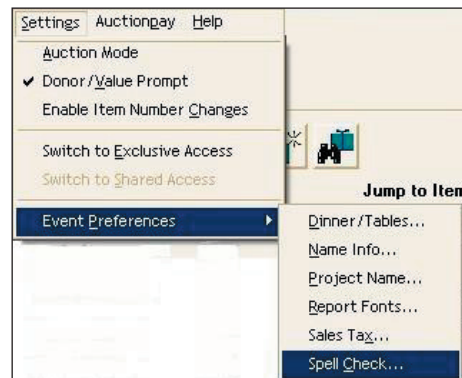
- **Item Entry:** Short Description, Full Description, Notes, and Category
- **Name Entry:** Titles and Notes
- **Settings & Event Preferences:** Ticket Titles, Entrée Names, Project Name, Name Categories, and Default State

Other fields, such as names and addresses are not checked, due to the many legitimate variations, e.g. “Jonsson & Johnson,” or “Cathy, Cathi, Cathie, Kathy, & Kathie.”

Disabling Spell Check

The spell check feature can be disabled if you prefer not to perform spell checking.

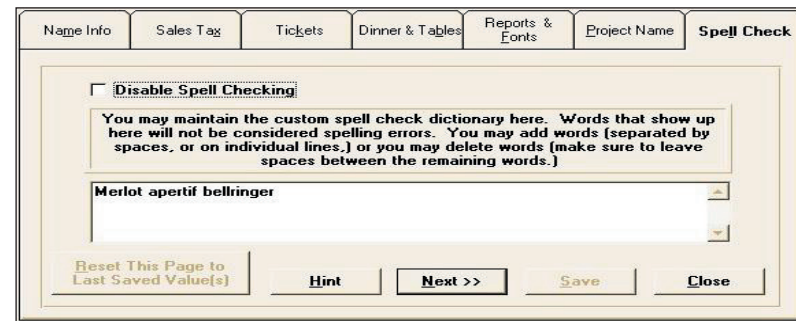
1. Click **Settings, Event Preferences, Spell Check**.
2. Click the box labeled **Disable Spell Checking** to turn this feature on or off.



Add Words to Custom Dictionary

Spell Check includes a standard dictionary with more than 115,000 words. You may also add your own words to a **Custom Dictionary**. You may type them in at any time to the **Custom Dictionary** location.

1. Click **Settings, Event Preferences, Spell Check**.
2. Add your custom words in the box, separating each word with a space.
or
Add words automatically as they are encountered during **Item Entry**.
3. Click **Add to dictionary** to insert individual words to the Custom Dictionary.



Use Spell Check to Correct Misspelled Words

1. Spell Check offers suggestions for the proper spelling of misspelled words.
2. You may **Ignore** each instance of the word or **Ignore All** to bypass spell check each time it finds this word.
3. To use one of the words on the **Suggestions** list, first highlight the chosen word (even if there is only one word in the list, you must still click on the word to highlight it.)
4. Choose **Change** to replace this instance of the word or **Change All** if you wish to change each misspelling of the word on this screen.

Note

Change All does not go through the entire dataset and update spelling. It changes only occurrences in the open record.

