

RPM Tips & Tricks:

Correcting Bids – From Data Entry to Completed Invoices

Background

Let's face it - mistakes happen. Inevitably, whether they happen during data entry or after the invoice has been finalized, problems can and probably will occur. This document is designed to help straighten out any wrinkles in the fabric of auctioneering.

Scenario 1: Bid Entry Problem Found During Data Entry, Lots Have Not Yet Been Invoiced

This is the simplest problem to fix. Simply perform the following:

Non-Lotted Bid Entry:

- Enter the affected lot number into the 'Bid Quick Entry' 'Lot Number' field. Press 'TAB' or 'ENTER'.
- To 'Lot Number Exists, Edit?', click 'Yes'.
- Fix the appropriate values.

Pre-Lotted Bid Entry:

- Find and highlight the affected lot number in the 'auction lot grid'. 'TAB' or 'ENTER' through the fields, correcting data entry errors.
- Or
- Enter the affected lot number into the 'Bid Quick Entry' 'Lot Number' field.
 - Fix the appropriate values.

Scenario 2: Bid Entry Problem Found During Data Entry, Lots Have Been Invoiced, Consignor Has Not Been Paid

Note: If the consignor has already been paid, the consignor payment will have to be voided. See Scenario 3, below.

In AuctionRPM, invoices are not 'adjusted' to repair problems. Instead, the offending invoice is voided and recreated. Any problems are fixed during invoice recreation.

To correct a previously finalized invoice, perform the following:

1. Void the invoice.

Path: Accounting – Billing – Invoice Management/Review

- Select the affected invoice either by using 'Select By Invoice Number', or by selecting the auction and clicking on the buyer name / bidder number / invoice number (as appropriate).
- Click on 'Void Invoice'. If requested, enter reason for the void and/or administrative password.

2. Recreate the invoice, making changes during the recreation.

Path: Accounting – Billing – Create Invoice

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- Select auction and bidder number. Bids may be altered by highlighting the errant lot number, and clicking 'Edit Bid'. Quantity, Amount and/or Bidder Number may be changed here.

If the item was broken at the auction facility and, therefore cannot be delivered to the winning bidder, highlight the lot number, and click 'Clear Selected Bid'. This action removes the winning bid amount as well as the winning bidder number from the auction bid entry screen.

Note: After removing bid information, it may be desirable to 'disposition' the item. 'Dispositioning' an item will permanently block it from being displayed as 'General Inventory' in the 'Add/Edit Lots' screen. Here's how to 'disposition' an item:

- Go to 'Auctions – Preparation tab – Add/Edit Lots'.
- Select the affected auction. Highlight the lot in question.
- Click on 'Return Item to General Inventory'. Write down the Inventory Item Number that will be displayed just prior to the 'return-to-general-inventory'.
- On the left screen ('General Inventory'), find the item number.
- Right-click and choose 'Assign Inventory Disposition', and the appropriate disposition. If a new disposition is needed, go to 'Tools – General tab – Master Data – Inventory Dispositions' and add a new one.

Note: The item may also be edited by choosing 'Auctions – Preparation tab – Inventory Master – (choose item) – History tab – (choose Disposition) – (Save the record)'.

- Enter the affected lot number into the 'Bid Quick Entry' 'Lot Number' field. Press 'TAB' or 'ENTER'.
- To 'Lot Number Exists, Edit?', click 'Yes'.
- Fix the appropriate values.

Scenario 3: Bid Entry Problem Found During Data Entry, Lots Have Been Invoiced, Consignor Has Been Paid, and Payment Has Been Recorded in AuctionRPM

Since the consignor has already been paid, voiding and recreating an invoice may affect his/her payment. AuctionRPM will disallow invoices to be voided if the consignor has already been paid.

Therefore, any consignor payments will need to be rescinded prior to voiding and changing the invoice. After invoice alteration, the Consignor Payment may be reentered in AuctionRPM.

Path: Accounting – Billing tab – Record Consignor Payments – (select consignor) – Payment History tab

Find the affected payment by using the 'View/ Print Check Detail' button. Write down the check number issued for the payment, or print the entire check detail. Use the 'Delete' button to remove the payment record.

Note: There is no audit trail for recorded consignor payments. If a payment record is deleted, the lots automatically become 'unpaid' and immediately show in the 'Unpaid Items' tab of this screen.

Return to the Invoice Management/Review screen and void the affected invoice. Then, correct any errors while recreating the invoice (see 'Scenario 2', above).

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Afterwards, return to 'Record Consignor Payments'. Re-record the consignor payment.