

# PremBid.

Your Online Auction Partner

PremProducts Administrative

Portal

Training Document



# PremProperty

Your Premium Property Partner

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## **Purpose of this document**

The purpose of this document is to guide users on how to effectively use the PremProducts Admin Portals. It aims to comprehensively cover all current functionalities of the Admin Portals and provide training and instructions on its use. This document serves as a Software Training Plan for the company's employees, staff, and vendors, outlining the necessary steps and policies to follow when developing or conducting software training related to the Admin Portal.

## **Scope of Document**

This training plan includes the current functionality within the Admin Portals of PremProducts. The plan covers all aspects of the Admin Portals and their related functionality, providing detailed information on each screen and how to use the features available.

## Terminology used in this Software Training Plan

<b>Term</b>	<b>Definition</b>
<b>Auction</b>	<i>The Auction to be created</i>
<b>Lot</b>	<i>The Lots/properties that you plan to sell on Auction.</i>
<b>PremBid</b>	<i>The Auction solution created by R and R Tech (Pty) Ltd. PremBid can be seen as R and R Tech (Pty) Ltd and can be used as a replacement for R and R Tech (Pty) Ltd</i>
<b>PremProperty</b>	<i>The Auction solution created by R and R Tech (Pty) Ltd. PremBid can be seen as R and R Tech (Pty) Ltd and can be used as a replacement for R and R Tech (Pty) Ltd</i>
<b>You</b>	<i>The individual, individual representing the company, the company or entity using the PremBid Solution owned by R and R Tech (Pty) Ltd.</i>
<b>STC</b>	<i>Subject to confirmation.</i>
<b>n.b. (nota bene)</b>	<i>Take note of the following.</i>
<b>SKU Number</b>	<i>Stock Keeping Unit.</i>
<b>Unique Code</b>	<i>Unique code generated by our system for each Lot.</i>
<b>Toggle</b>	<i>Switching between two options or settings, usually by clicking a button or flipping a switch. For example, you can toggle the password visibility on or off by clicking the eye icon.</i>

# **Set up**

## **Creating Admin Roles**

### 1. Creating a Super Admin

- Admin Portal: If a super admin user has not been created, please contact [support@randrtechsa.co.za](mailto:support@randrtechsa.co.za) to create your Super Admin role for the PremBid admin portal.
- A privileged user with the ability to create, manage, and assign roles to other users within the platform. This role has full administrative rights, including overseeing user permissions and access levels.

### 2. Creating an Admin User

- A standard user with access to the platform's core features, excluding the ability to create or manage other users. This role is designed for individuals who need to utilize the system without administrative responsibilities.

### 3. Creating an Admin Bidder

- A specialized user with permissions to place bids on auctions through the admin portal. This role is focused solely on bidding activities and does not include management or administrative capabilities.

## **Accepting Terms of Use**

In order to use the PremProducts solution, our Terms of Use policy must be accepted. The agreement will be displayed upon the first login of each user created to access the Admin Portals.

Please note that this forms a contractual agreement between PremProducts and you. Your acceptance will be recorded, and agreeing to the terms is a prerequisite for using the PremProducts solution.

You may download or keep a record of the agreement at this time if you wish to do so.

## Log In Screen

The image shows the PremBid login interface. At the top is the PremBid logo with the tagline 'Your Online Auction Partner'. Below the logo is the text 'Log In'. There are two input fields: 'Email' (callout 1) and 'Password' (callout 2). To the right of the Password field is a 'Password Visibility Icon' (callout 5). Below the Password field is a teal 'Submit' button (callout 3). Below the Submit button is a blue link labeled 'Forget Password?' (callout 4).

### Follow these steps:

The **Login Screen** is where you access your Admin Portal account.

1. Enter the email address you registered on the system.
2. Enter the password associated with that email address.
3. Click **Submit** to log in.
4. If you have forgotten your password, click the “**Forgot Password**” link.
5. **Password Visibility Icon:** This icon, often represented by an eye symbol, allows users to toggle the visibility of their password. Clicking the icon shows or hides the password characters, helping users verify their input for accuracy without compromising security.

## Common error messages on Login screen:

### Email field:

- **Please enter a valid email address – not completing email address:**
  1. This indicates that the email address entered does not meet the format requirements (e.g., missing '@' or domain).
  2. The email address entered is not valid according to the system's criteria.

Email \*  
chanterandrtechsa.co.za

❗ Please enter a valid email address.

- **Email field cannot be blank:**
  1. The email field was left empty when it was required.

Email \*  
Email

❗ Email field cannot be blank

- **User was not found please sign up:**
  1. The email address does not match any existing users, suggesting that the user should create a new account. This will display in the top left corner of the screen.

✕ The user was not found. CLOSE

Password field:

- **Password provided is incorrect:**

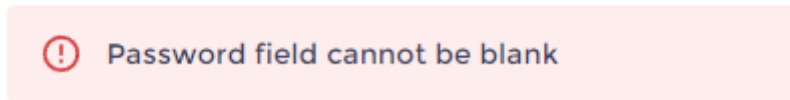
1. The password entered does not match the one on file for the given email address. This will display in the top left corner of the screen.
2. The password entered does not match the one on record.



- **Password field cannot be blank:**

1. The password field was left empty when it was required.
2. Reiterates that the password field must be filled out.

Password \*

## Forgot Password



### Forgot Password

①  We will send you an email to reset your password.

②

③

#### **Follow these steps:**

The **Forgot Password** screen is where you can reset your password if you have forgotten it.

On the **PremProducts Admin Portal** login screen, select **Forgot Password**.

1. Enter the registered email address.
2. Select **Submit**. If the user exists, you will receive an email. Click the **Reset Password** link in the email. If the user does not exist, an error message will appear.
3. If you do not wish to reset your password, click the **Cancel** button, which will redirect you back to the **Login** screen.

Common error messages on Forgot Password screen:

**Please enter a valid email address.**

1. This indicates that the email address entered does not meet the format requirements (e.g., missing '@' or domain).
2. The email address entered is not valid according to the system's criteria.

Email

CHANTERANDRTECHSA.CO.ZA

⚠ Please enter a valid email address.

**Email field cannot be blank.**

1. Email address field was left blank.

Email

⚠ Email field cannot be blank

**User was not found.**


1. Email address entered was an invalid email address with incorrect spelling (no user found). This will display in the top left corner of the screen.


✘ The user was not found. CLOSE

# Reset Password



## Reset Password

1 — Password 6 

2 — Confirm Password 6 

3 {  
  × Min 6 Characters  
  × One Uppercase Letter  
  × One Lowercase Letter  
  × One Number  
  × One Special Character  
  × Passwords Must Match

4 —

5 —

### **Follow the steps:**

The “**Reset Password**” screen provides all the information you need to reset your password if you’ve forgotten it. To begin, press the “Forgot Password” button, and you will be redirected to the Reset Password screen.

1. Enter a valid “**Password.**”
2. Fill in the “**Confirm Password**” field.
3. Follow the password requirements.
4. Click “**Submit**” to be redirected to the “**Check Your Email**” screen.
5. Clicking the “**Cancel**” button will redirect you to the “**Login**” screen. Refer to Pg. 7 for details.
6. Use the password visibility icon to toggle the visibility of your password.

## Check Your Email



### Check your email!

If you provided us with the correct email address used to create your account, please check your email and follow the provided link to reset your password.

If you do not receive an email, please check your **SPAM folder.**

Please also ensure that you inserted the correct email associated with your account or click on the highlighted link and try a [different email.](#)

Go To Log In

#### Follow the steps:

The “Check Your Email” screen provides all the information you need to reset your password. If you entered the correct email address, you will receive an email with a link to reset your password.

The "Go to Log in" button will redirect the user to the login screen.

# Auctions

**PremBid**  
2024.9.31.1

NAVIGATION MENU

- Auctions
- Lots
- Contacts/Agents
- Users
- System Management
- System Documentation

Go to [www.clientportal.prembid.com](http://www.clientportal.prembid.com)

### Auctions/Create Auction

Search...

Name	Type	Start Time	End Time	Active	Status	
Streamed Auction	Streamed	2024/09/16 11:17	2024/09/16 15:00	Yes	Open	[+]
Tender	Tender	2024/09/16 11:16	2024/09/16 15:00	Yes	Open	[List] [Edit] [Delete]
Timed Auction	Timed	2024/09/16 11:15	2024/09/16 15:00	Yes	Open	[List] [Edit] [Delete]

Items per page 10 1-3 of 3

2 3

[Refresh] [Filter]

4 [Add]

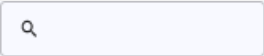






5 [List] [Edit] [Delete] 6



7

**Follow these steps:**

The “Auctions” screen displays all the auctions created by the admin user. Auctions, along with their associated details, lots, and information, will appear on the Client Portal when marked as “Active: yes.” If an auction is marked as “no,” it will not be displayed on the Client Portal.

1. You can either search for a specific auction using the “Search bar” or select an auction by scrolling down the screen.
2. Refresh the auction details to display the most current auction data.
3. Filter the information by “Active,” “Status,” or “Type.”
4. Clicking “Add” will redirect you to the “Auction Information” screen. Refer to Pg. 22.
5. Clicking the “Go to Lots” button will redirect you to the “Lots Information” screen.
6. You can delete the auction by clicking the “Delete” button.
7. You can edit the auction by clicking the “Edit” button.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search	Search Auctions by name, date, or any related information.
	Filter	Click to filter by Active, Type and Status.
	Refresh	Click to refresh the auction details to display the most current auction data.
	Add Auction	Click to create an Auction.
<b>Name</b>	Name	Displays Auction name.
<b>Type</b>	Type	Displays the type of Auction.
<b>Start Time</b>	Start Time	Displays Auction start time.
<b>End Time</b>	End Time	Displays Auction end time.
<b>Active</b> 	Active	Yes = Visible on PremBid client portal. No = Not visible on client portal.
<b>Status</b> 	Status	Open = Auction is Open. Closed = Auction is Closed. Awaiting = Auction has not started.
	Go to Lots	A shortcut to take you to the Lots for the related Auction. Lots are added and edited in this section.

	<i>View/ Edit Auction</i>	<i>A shortcut to take you to view the Auction, its related information and where you can then edit the Auction.</i>
	<i>Delete</i>	You can delete the auction by clicking the “Delete” button.
Items per page 10 ▼	<i>Items per page</i>	You can select the amount of auctions displayed on the screen from the drop-down menu.
1-3 of 3	<i>Amount of auctions</i>	<i>Actual amount of auctions on the system.</i>

# Adding An Auction (Auction Information)

## Timed

The screenshot shows the 'PremBid' system interface for adding a new auction. The left sidebar contains a navigation menu with options: Auctions, Lots, Contacts/Agents, Users, System Management, and System Documentation. The main content area is titled 'AUCTION INFORMATION' and contains the following fields and controls:

- 1: Name (Max 100 Characters) - Timed Auction
- 2: Description - Timed Auction
- 3: Default Lot Type - Residential Property
- 4: Default Contact/Agent - Chante Eyelaar
- 5: Auction Type - Timed
- 6: Default Registration Deposit - R 0.00
- 7: Default Buyer's Commission - % 0.00
- 8: Stagger Lot End Time - Hours, Mins, Secs
- 9: Default Late Bid Extension Window - Hours, Mins, Secs
- 12: Default Late Bid Extension - Hours, Mins, Secs
- 10: Start Time - 2024/09/16 11:05
- 13: End Time - 2024/09/16 16:45
- 11: Active -
- 14: Venue - Cape Town
- 15: Bank Details - Discovery
- 16: Default Increment Table - Chante
- 17: Default Increment - R 0.00
- 18: Default Bidding Calculation
- 19: Do you require invoicing for this Auction? -
- 20: Default STC Status -
- 21: Default Show Paddle Number -
- 22: Default Show when the Reserve is Met -
- 23: Default Watermark Images -

## Auction Information Screen Guide - Timed

The “Auction Information” screen contains all the necessary fields to successfully save an auction. Fields marked as mandatory must be completed, while optional fields allow for customization later on the Lot Information screen.

### Instructions:

1. **Auction Name:**

Enter a name for your auction. (Mandatory)

2. **Auction Description:**

Provide a description of the auction. (Optional)

3. **Default Lot Type:**

Select the default "Lot Type" (e.g., Residential or Commercial) from the drop-down menu or use the quick add button to create a new contact. This can be customized per Lot later. (Mandatory)

4. **Default Contact/Agent:**

Choose a contact person from the drop-down menu or use the quick add button to create a new contact. This can be customized for each Lot later. (Mandatory)

5. **Auction Type:**

Choose the auction type: Timed, Streamed, or Tender. (Mandatory)

6. **Default Registration Deposit:**

Enter a registration deposit amount. This can be customized for each Lot later. (Optional)

7. **Default Buyer's Commission:**

Enter a buyer's commission amount. This can be customized for each Lot later. (Optional)

8. **Staggered Lot End Time:**

You can add staggered end times for the Lots. (Optional)

9. **Late Bid Extension Window:**

Enter the time window for late bid extensions to apply. This can be customized for each Lot later. (Optional)

10. **Auction Start Time:**

Set the start time for when the auction becomes available, this can be backdated. (Mandatory)

11. **Active Auction:**

Use the slider to mark the auction as “Active” once the start time applies. (Optional)

**12. Default Late Bid Extension:**

Fill in a default late bid extension time. If late bid extensions apply, the extension window (field 9) is mandatory. (Optional)

**13. Auction End Time:**

Set the end time for the auction, auction end time should always be later than the auction start time, it can be future-dated. (Mandatory)

**14. Default Venue:**

Select a default venue from the drop-down menu or use the quick add button to add a new venue. You can customize this per Lot later. (Optional)

**15. Bank Details:**

Choose bank details from the drop-down menu or use the quick add button to add new banking details. (Optional)

**NOTE:** Bank details will only be mandatory if invoicing is required for the auction.

**16. Default Increment Table:**

Select an increment table from the drop-down menu or use the quick add button to add a new increment table. You can customize this for each Lot. (Mandatory)

**17. Default Increment Amount:**

If no increment table is selected, enter a default increment amount. This can be customized per Lot. (Mandatory)

**18. Default Bidding Calculation:**

Add a default bidding calculation method from the drop-down menu or use the quick add button to add new bidding calculation details if applicable. This can be customized per Lot. (Optional)

**19. Invoicing Applicable:**

Set whether invoicing applies by selecting "Yes" or "No." (Optional)

**20. STC Status:**

Choose whether the Sale Subject to Confirmation (STC) status applies by selecting "Yes" or "No." This can be customized per Lot. (Optional)

**21. Default Show Paddle Number:**

Choose whether to display paddle numbers on the bidding grid. This can be customized per Lot. (Optional)

**22. Default Show When Reserve Is Met:**

Choose whether to show when the reserve price is met on the Lots. This can be customized per Lot. (Optional)

**23. Default Watermark Images:**

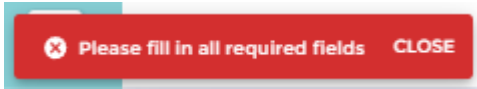
Choose whether to display watermarked images by default. This can be customized per Lot. (Optional)

Note on Customization:

When an option is described as "customizable," it means that it can be adjusted for individual Lots later on the Lot Information screen.

Error messages when leaving mandatory components blank:

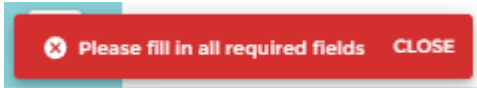
- Auction Name



Name (Max 100 Characters) \*

This error message will display on the top left corner of your screen, the related component will highlight in red.

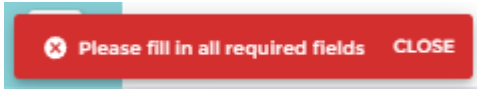
- Default Lot Type



Default Lot Type \*

This error message will display on the top left corner of your screen, the related component will highlight in red.

- Default Contact/Agent



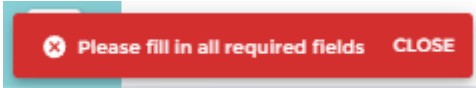
Default Contact/Agent \*

This error message will display on the top left corner of your screen, the related component will highlight in red.

- Auction Type

This is a mandatory field, and an auction type has to be selected. If an auction type is not selected, it will default to a Timed auction. There is no related error message, and the component will not highlight in red.

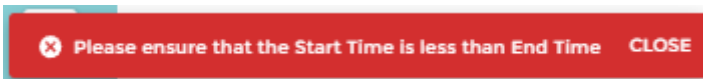
- Bank details



Bank Details \*

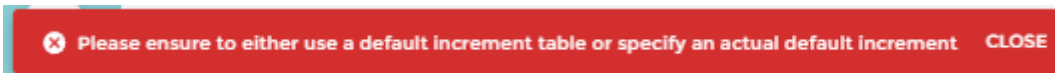
This error message will only appear if invoicing has been set to active for the auction. This error message will display on the top left corner of your screen, the related component will highlight in red.

- Auction Start Time



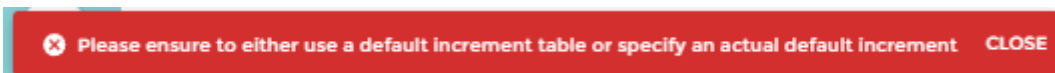
If the start time is set later than the end time, this error message will appear upon saving. This error message will display on the top left corner of your screen

- Default Increment Table



This error message will display on the top left corner of your screen. If no increment amount is specified or an increment table is not selected, this error message will appear.

- Default Increment Amount



This error message will display on the top left corner of your screen. If no increment amount is specified or an increment table is not selected, this error message will appear.

# Streamed

The screenshot shows the 'Streamed Auction' form in the PremBid system. The form is divided into several sections: 'AUCTION INFORMATION', 'AUCTION IMAGE', 'AUCTION DOCUMENTS', and 'LOTS INFORMATION'. The 'AUCTION INFORMATION' section contains the following fields:

- 1. Name (Max 100 Characters): Streamed Auction
- 2. Description: Streamed Auction
- 3. Default Lot Type: Commercial Property
- 4. Default Contact Agent: Charlie Eygelaar
- 5. Auction Type: Streamed
- 6. Default Registration Deposit: R 0.00
- 7. Default Buyer's Commission: % 0.00
- 8. Stagger Lot End Time: Hours (0), Mins (0), Secs (0)
- 9. Start Time: 2024/09/16 15:17
- 10. End Time: 2024/09/16 15:00
- 11. Active:

The 'AUCTION DOCUMENTS' section contains:

- 12. Venue: Cape Town
- 13. Bank Details: Discovery
- 14. YouTube Stream URL: (empty)

The 'AUCTION IMAGE' section contains:

- 15. Default STC Status:
- 16. Default Show when the Reserve is Met:
- 17. Default Watermark Images:

The interface includes a navigation menu on the left with options like 'Auctions', 'Lots', 'Contacts/Agents', 'Users', 'System Management', and 'System Documentation'. The top right corner shows the URL 'www.prembid.com' and a user profile icon.

## Auction Information Screen Guide - Streamed

The "Auction Information" screen contains fields necessary for successfully saving a Streamed Auction. Fields marked as (Mandatory) are required to complete for the auction to be saved successfully, while (Optional) fields allow for further customization on the Lot Information screen.

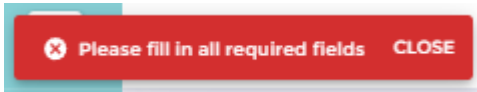
### Instructions:

1. **Auction Name:**  
Enter a name for your auction. (Mandatory)
2. **Auction Description:**  
Provide a description of the auction.(Optional)
3. **Default Lot Type:**  
Select the default "Lot Type" (e.g., Commercial or Residential Property) from the drop-down menu or use the quick add button to create a new Lot type. This can be customized per Lot later.(Mandatory)
4. **Default Contact/Agent:**  
Select a contact person from the drop-down menu or use the quick add button to create a new Contact person. This can be customized for each Lot later. (Mandatory)
5. **Auction Type:**  
Choose the auction type: Timed, Streamed, or Tender. (Mandatory)
6. **Default Registration Deposit:**  
Enter a registration deposit amount, which can be customized for each Lot later.  
(Optional)
7. **Default Buyer's Commission:**  
Enter a buyer's commission amount, which can be customized for each Lot later.  
(Optional)
8. **Staggered Lot End Time:**  
You can add staggered end times for the Lots. (Optional)
9. **Auction Start Time:**  
Set the start time for when the auction becomes available. This can be backdated.  
(Mandatory)
10. **Auction End Time:**  
Set the end time for the auction. The end time should always be later than the start time, and it can be future-dated. (Mandatory)
11. **Active Auction:**  
Use the slider to mark the auction as "Active" once the start time applies. (Optional)

12. **Default Venue:**  
Select a default venue from the drop-down menu or use the quick add button to create a new venue. This can be customized for each Lot later. (Optional)
13. **Bank Details:**  
Choose bank details from the drop-down menu or use the quick add button to create new banking details. (Optional)  
**NOTE:** Bank details will only be mandatory if invoicing is required for the auction.
14. **YouTube Stream Link:**  
For streamed auctions, provide the YouTube stream link here. This only applies to Streamed auctions. (Optional)
15. **STC Status:**  
Choose whether the Sale Subject to Confirmation (STC) status applies by selecting “Yes” or “No.” This can be customized per Lot. (Optional)
16. **Default Show When Reserve Is Met:**  
Choose whether to show when the reserve price is met on the Lots. This can be customized per Lot. (Optional)
17. **Default Watermark Images:**  
Choose whether to display watermarked images by default. This can be customized per Lot. (Optional)

Error messages when leaving mandatory components blank:

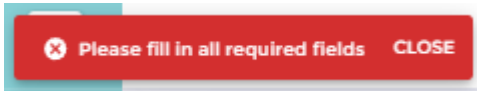
- Auction Name



Name (Max 100 Characters)\*

This error message will display on the top left corner of your screen, the related component will highlight in red.

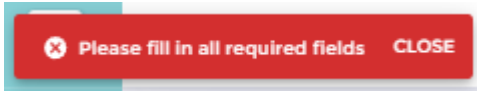
- Default Lot Type



Default Lot Type\*

This error message will display on the top left corner of your screen, the related component will highlight in red.

- Default Contact/Agent



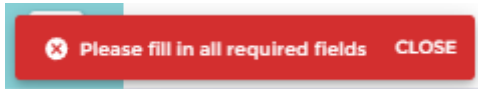
Default Contact/Agent\*

This error message will display on the top left corner of your screen, the related components will highlight in red.

- Auction Type

This is a mandatory field, and an auction type has to be selected. If an auction type is not selected, it will default to a Timed auction. There is no related error message, and the component will not highlight in red.

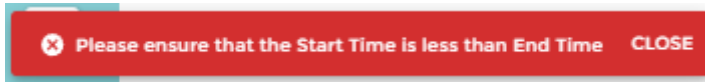
- Bank details



Bank Details \*

This error message will only appear if invoicing has been set to active for the auction. This error message will display on the top left corner of your screen, the related component will highlight in red.

- Auction Start Time



If the start time is set later than the end time, this error message will appear upon saving. This error message will display on the top left corner of your screen

# Tender

The screenshot displays the 'PremBid' web application interface for creating a tender. The left sidebar contains a navigation menu with categories: Auctions, Lots, Contacts/Agents, Users, System Management, and System Documentation. The main content area is titled 'AUCTION INFORMATION' and contains the following fields and controls:

- 1**: Name (Max 100 Characters) - Text input field containing 'Tender'.
- 2**: Description - Text area containing 'Tender'.
- 3**: Default Lot Type - Dropdown menu showing 'Residential Property'.
- 4**: Default Contact/Agent - Dropdown menu showing 'Chante Eygelaar'.
- 5**: Auction Type - Dropdown menu showing 'Tender'.
- 6**: Default Registration Deposit - Text input field containing 'R 0.00'.
- 7**: Default Buyer's Commission - Text input field containing '% 0.00'.
- 8**: Stagger Lot End Time - Sub-section with three input fields for Hours (0), Mins (0), and Secs (0).
- 9**: Start Time - Date and time picker showing '2024/09/16 11:36'.
- 10**: End Time - Date and time picker showing '2024/09/16 15:00'.
- 11**: Active - Toggle switch currently turned on.
- 12**: Winloc - Dropdown menu showing 'Bloemfontein'.
- 13**: Bank Details - Dropdown menu showing 'Discovery'.
- 14**: Do you require invoicing for this Auction? - Toggle switch currently turned off.
- 15**: Default Show when the Reserve is Met - Toggle switch currently turned on.
- 16**: Default STC Status - Toggle switch currently turned on.
- 17**: Default Watermark Images - Toggle switch currently turned off.

## Auction Information Screen Guide - Tender Auction

The "Auction Information" screen contains fields necessary for successfully saving a Tender Auction. Fields marked as (Mandatory) are required to complete for the auction to be saved successfully, while (Optional) fields allow for further customization on the Lot Information screen.

### Instructions:

1. **Auction Name:**  
Enter a name for your auction. (Mandatory)
2. **Auction Description:**  
Provide a description of the auction. (Optional)
3. **Default Lot Type:**  
Select the default "Lot Type" (e.g., Commercial or Residential Property) from the drop-down menu or use the quick add button to create a new Lot type. This can be customized per Lot later. (Mandatory)
4. **Default Contact/Agent:**  
Select a contact person from the drop-down menu or use the quick add button to create a new Contact person. This can be customized for each Lot later.  
(Mandatory)
5. **Auction Type:**  
Choose the auction type: Timed, Streamed, or Tender. (Mandatory)
6. **Default Registration Deposit:**  
Enter a registration deposit amount, which can be customized for each Lot later.  
(Optional)
7. **Default Buyer's Commission:**  
Enter a buyer's commission amount, which can be customized for each Lot later.  
(Optional)
8. **Staggered Lot End Time:**  
You can add staggered end times for the Lots. (Optional)
9. **Auction Start Time:**  
Set the start time for when the auction becomes available. This can be backdated.  
(Mandatory)
10. **Auction End Time:**  
Set the end time for the auction. The end time should always be later than the start time, and it can be future-dated. (Mandatory)

**11. Active Auction:**

Use the slider to mark the auction as “Active” once the start time applies. (Optional)

**12. Default Venue:**

Select a default venue from the drop-down menu or use the quick add button to create a new venue. This can be customized for each Lot later. (Optional)

**13. Bank Details:**

Choose bank details from the drop-down menu or use the quick add button to create new banking details. (Optional)

**NOTE:** Bank details will only be mandatory if invoicing is required for the auction.

**14. Invoicing Applicable:**

Set whether invoicing applies by selecting “Yes” or “No.” (Optional)

**15. Default Show When Reserve Is Met:**

Choose whether to show when the reserve price is met on the Lots. This can be customized per Lot. (Optional)

**16. STC Status:**

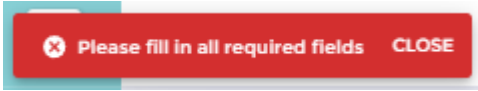
Choose whether the Sale Subject to Confirmation (STC) status applies by selecting “Yes” or “No.” This can be customized per Lot. (Optional)

**17. Default Watermark Images:**

Choose whether to display watermarked images by default. This can be customized per Lot. (Optional)

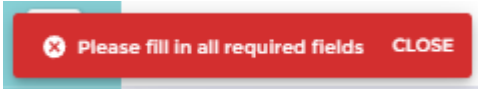
Error messages when leaving mandatory components blank:

- Auction Name

A text input field with a red border. The text "Name (Max 100 Characters) \*" is displayed in red at the top left of the field.

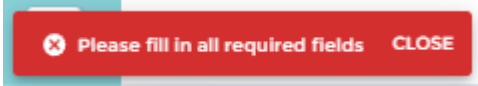
This error message will display on the top left corner of your screen, the related component will highlight in red.

- Default Lot Type

A dropdown menu with a red border. The text "Default Lot Type \*" is displayed in red at the top left of the field.

This error message will display on the top left corner of your screen, the related component will highlight in red.

- Default Contact/Agent

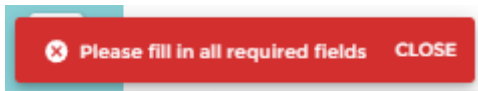
A dropdown menu with a red border. The text "Default Contact/Agent \*" is displayed in red at the top left of the field.

This error message will display on the top left corner of your screen, the related component will highlight in red.

- Auction Type

This is a mandatory field, and an auction type has to be selected. If an auction type is not selected, it will default to a Timed auction. There is no related error message, and the component will not highlight in red.

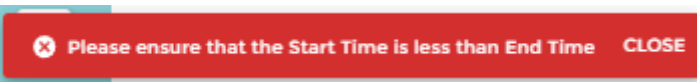
- Bank details



Bank Details \*

This error message will only appear if invoicing has been set to active for the auction. This error message will display on the top left corner of your screen, the related component will highlight in red.

- Auction Start Time



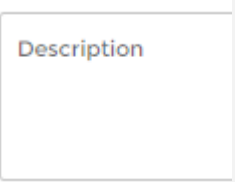
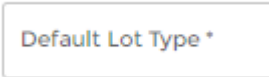


If the start time is set later than the end time, this error message will appear upon saving. This error message will display on the top left corner of your screen.

**Icon**

**Name**




**Description**

	<p><i>Auction Information</i></p>	<p>The "<b>Auction Information</b>" screen provides all the essential details required to set up and save an auction successfully. Each field captures specific information that ensures the auction functions properly, including mandatory data like auction name, type, and time settings.</p>
	<p><i>Name of the Auction</i></p>	<p>Enter the <b>name of the Auction</b> that will display on the PremProducts client portal. This field is where you enter the name of your auction. It has a <b>100-character limit</b> and is mandatory for saving the auction.</p>
	<p><i>Description</i></p>	<p>This is an optional field where you can provide additional details about the auction. The information entered here will help give context or background to participants but is not required for saving the auction.</p>
	<p><i>Default Lot Type</i></p>	<p>This displays a drop-down menu of Lot types that you can choose from. i.e Residential property, Motor vehicle.</p>

<input type="text" value="Default Lot Type *"/> +	<i>Quick Add Icon (Next to Default Lot Type)</i>	<i>This is an <b>Add</b> button. You can use this to create and add a new Default Lot Type directly while setting up the auction. Selecting this icon opens a form to add a new Default Lot Type.</i>
<input type="text" value="Venue"/>	<i>Venue</i>	<i>Displays a drop-down menu of venues that have been previously added. This field is optional; however, if no venue is selected or created, a location must be filled in for each Lot. <b>Note:</b> This assigns a default venue to all Lots or properties added to the auction.</i>
<input type="text" value="Venue"/> +  <input type="text" value="Default Contact/Agent *"/>	<i>Quick Add Icon (Next to Venue)</i>  <i>Default Contact/Agent</i>	<i>This is an <b>Add</b> button. You can use this to create and add a new Default Venue directly while setting up the auction. Selecting this icon opens a form to add a new Venue.</i>  <i>Displays a drop-down menu of previously added contacts. When a default contact is selected, their details are automatically assigned to all Lots or properties being added to the auction. All their related details will be shown for each Lot on the PremProducts client portal.</i>
<input type="text" value="Default Contact/Agent *"/> +	<i>Quick Add Icon (Next to Default Contact/Agent)</i>	<i>This is an <b>Add</b> button. You can use this to create and add a new Default Contact/Agent directly while setting up the auction. Selecting this icon opens a form to add a new Contact/Agent.</i>
<input type="text" value="Bank Details"/>	<i>Bank Details</i>	<i>This section allows you to enter and manage your bank account information for transactions. Providing accurate bank details is crucial for processing payments, transfers, or any financial activities. Ensure all fields are completed correctly to avoid delays or errors.</i>

<input type="text" value="Bank Details"/> +	<i>Quick Add Icon (Next to Bank Details)</i>	<i>This is an <b>Add</b> button. You can use this to create and add a new Default Contact/Agent directly while setting up the auction. Selecting this icon opens a form to add a new Contact/Agent.</i>
<input type="text" value="Auction Type*"/> _____ <input type="text" value="Timed"/> _____ <input type="text" value="Auction Type*"/> _____ <input type="text" value="Streamed"/> _____ <input type="text" value="Auction Type*"/> _____ <input type="text" value="Tender"/> _____	<i>Auction Type</i>	<i>The type of Auction you plan to run, either “Timed”, “Streamed” or “Tender”.</i>
<input type="text" value="Default Registration Deposit"/> _____ <input type="text" value="R 0.00"/>	<i>Default Registration Deposit</i>	<i>Sets the Default Registration Deposit Amount for the Auction. <b>Note:</b> A deposit is not required to register; this amount is provided at your discretion. This deposit amount cannot be changed for individual Lots. The deposit will only be charged once when registering for the auction and does not apply to individual Lots.</i>
<input type="text" value="Default Buyer's Commission"/> _____ <input type="text" value="% 0.00"/>	<i>Default Buyer's Commission</i>	<i>Sets the default increment for the Auction and Lots for the buyer's commission. This can be changed per Lot.</i>
<input type="text" value="Please either create/use a default increment table or set a default increment"/>	<i>Reminder message</i>	<i>This message reminds the admin user to select either a Default increment Table or a Default increment amount that applies to the lots. This can be changed per Lot.</i>

<p>Default Increment Table *</p>	<p>Default Increment Table</p>	<p>The Default Increment Table is used to define and manage the standard incremental values applied to bids, prices, or other measurable quantities within an auction or pricing system. This table provides a structured way to set default increment amounts that automatically adjust values according to predefined rules.</p>
<p>Default Increment * R 0.00</p>	<p>Default Increment Amount</p>	<p>The Default Increment Amount is the predetermined value by which bids, prices, or other quantities increase in an auction or pricing system. <b>Note:</b> This is the minimum increment you require for bidders to be able to submit a bid. This can be changed at a later stage for individual Lots.</p>
<p>Default Bidding Calculation</p>	<p>Default Bidding Calculation</p>	<p>These calculations determine the invoice totals and are used for invoicing. They will be displayed to bidders to inform them of their liabilities during bidding. i.e Additional costs or VAT.</p>
<p>Default Bidding Calculation +</p>	<p>Quick Add Icon (Next to Default Bidding Calculation)</p>	<p>This is an <b>Add</b> button. You can use this to create and add a new Default Bidding Calculation directly while setting up the auction. Selecting this icon opens a form to add a new Default Bidding Calculation.</p>
<p>Stagger Lot End Time Hours: 0 Mins: 0 Secs: 0</p>	<p>Stagger Lot End Time</p>	<p>The Stagger Lot End Time feature allows for the scheduling of different end times for individual Lots in an auction. This feature is used to prevent simultaneous lot closures, providing a staggered end schedule that enhances the auction experience and allows for more manageable bidding activities.</p>
<p>Default Late Bid Extension Window Hours: 0 Mins: 0 Secs: 0</p>	<p>Default Late Bid Extension Window</p>	<p>The Default Late Bid Extension Window is the allocated time period during which the Late Bid Extension will be triggered. If a bid is placed within this window, the auction end time for the Lot will be extended by the Default Late Bid Extension duration.</p>


		<p><b>Window Duration:</b> The time frame before the original auction end time during which placing a bid will activate the Late Bid Extension.</p>
<p>Default Late Bid Extension</p> <p>Hours <input type="text" value="0"/> Mins <input type="text" value="0"/> Secs <input type="text" value="0"/></p>	<p><b>Default Late Bid Extension</b></p>	<p>The Default Late Bid Extension is the additional amount of time added to the end of an auction for a Lot if a bid is placed during the final moments before the original closing time. This extension ensures that the auction remains fair by allowing more time for bidding activity to continue.</p> <p><b>Extension Duration:</b> The specific amount of time (e.g., minutes or seconds) that is added to the auction end time whenever a bid is placed within the designated period.</p>
<p>Start Time</p> <p>2024/09/18 09:44 </p>	<p><b>Start Date and Time</b></p>	<p>Manually enter information or add "Start Time" by clicking the calendar icon.</p>
<p>End Time</p> <p>2024/09/18 09:44 </p>	<p><b>End Date and Time</b></p>	<p>Manually enter information or add "End Time" by clicking the calendar icon.</p>
<p>Active </p>	<p><b>Active Status</b></p>	<p>When an auction is marked as "Active," it indicates that the auction is currently live and operational. An active auction will be visible and accessible on the client portal, allowing participants to view, place bids, and interact with the auction in real time.</p> <p><b>Note:</b> Only make an Auction active when you are happy with all the information, imagery, and descriptions. You can continue to work on the Auction and related Lots and make the Auction active at a later stage.</p>

Active 

*Inactive Status*

*When an auction is marked as "Inactive," it indicates that the auction is not currently live or accessible for participation. An inactive auction will not be displayed on the client portal, and users will not be able to view or place bids on the Lots.*


**Note:** *If an auction is marked as inactive, it will remain hidden on the client portal even if the start time is set for a future date or time. The auction will only become visible and accessible when its status is changed to "Active."*

Do you require invoicing for this Auction? 

*Invoicing set to Active*

*This toggle switch allows you to specify whether invoicing is required for the auction.*


**Active:** *Invoicing is enabled for the auction.*

Do you require invoicing for this Auction? 

*Invoicing set to inactive*

*This toggle switch allows you to specify whether invoicing is required for the auction.*


**Inactive:** *Invoicing is not required for the auction.*

Default STC Status 

*STC Status active*

*This toggle switch lets you decide if the Sale Subject to Confirmation (STC) status will apply to the auction.*

**Active:** *The auction is subject to confirmation, meaning the sale is not final until confirmed.*

Default STC Status 

*STC Status inactive*

*This toggle switch lets you decide if the Sale Subject to Confirmation (STC) status will apply to the auction.*


**Inactive:** *The auction does not require confirmation, and the sale is final once a bid is accepted.*

Default Show Paddle Number 

*Paddle number displaying active*

*This toggle switch controls whether the paddle numbers are displayed on the bidding grid.*

**Active:** *Paddle numbers are displayed by default.*

Default Show Paddle Number 

*Paddle number displaying inactive*

*This toggle switch controls whether the paddle numbers are displayed on the bidding grid.*

**Inactive:** *Paddle numbers are hidden by default.*

<p>Default Show when the Reserve is Met <input checked="" type="checkbox"/></p>	<p><i>Reserve met status active</i></p>	<p><i>This toggle switch determines whether the reserve price status is displayed. <b>Active:</b> The system will display whether the reserve has been met, showing "Yes" or "No."</i></p>
<p>Default Show when the Reserve is Met <input type="checkbox"/></p>	<p><i>Reserve met status inactive</i></p>	<p><i>This toggle switch determines whether the reserve price status is displayed. <b>Inactive:</b> No reserve status will be shown to the bidders.</i></p>
<p>Default Watermark Images <input checked="" type="checkbox"/></p>	<p><i>Image watermark active</i></p>	<p><i>This toggle switch controls whether watermarked images are displayed by default across various auction screens. <b>Active:</b> Watermarked images will be shown on the Lot screen, My Activity, My Wishlist, and Bidding screen.</i></p>
<p>Default Watermark Images <input type="checkbox"/></p>	<p><i>Image watermark inactive</i></p>	<p><i>This toggle switch controls whether watermarked images are displayed by default across various auction screens. <b>Inactive:</b> No watermarked images will be displayed on these screens.</i></p>
<p>YouTube Stream URL</p>	<p><i>Youtube Stream URL</i></p>	<p><i>This field allows you to input a URL for a YouTube live stream that will be linked to the auction. Participants can use this to watch the auction in real-time if it is being streamed via YouTube. This feature is optional but can enhance the auction experience for remote bidders.</i></p>

## Quick add button forms:

- Default Lot Type

Lot Type Information — 1

Name\* — 2

Description — 3

Custom Lot Type Information — 4

Field — 5

Field\* — 7

Field\*

Field\*

+ — 6

+ — 8

+ — 9

+ — 9

+ — 9

+ — 9

+ — 10

X Cancel — 11

Save — 12

## Instructions:

### 1. **Lot Type Information**

This section collects the basic details for the Lot Type.

### 2. **Name** (Mandatory)

The field where you enter the name of the Lot Type.

### 3. **Description** (Optional)

A field where you can provide an optional description of the Lot Type.

### 4. **Custom Lot Type Information**

This section allows you to define custom fields for the Lot Type, providing flexibility for additional details.

### 5. **Field** (Mandatory)

The first custom field that needs to be filled. You can add multiple fields using the icons.

### 6. **Add Field Button (+)**

This button allows you to add additional custom fields for the Lot Type.

### 7. **Delete Field Button (Trash Icon)**

This button removes the custom field that you no longer need.

## **Reorder Arrows:**

### 8. **Down Arrow**

Shifts the field down by one row, making it easy to move fields below others.

### 9. **Up Arrow**

Shifts the field up by one row, allowing you to reorder the fields.

### 10. **Delete Field Button (Trash Icon)**

This button removes the custom field that you no longer need.

### 11. **Cancel Button**

Click this to cancel the operation and discard any changes made.

### 12. **Save Button**

This button saves the new Lot Type and any custom fields add

- Default Contact/Agent

The image shows a user interface for adding or editing a contact/agent. The form is titled "Contact/Agent" (1) and contains a section for "Contact/Agent Information" (2). In the center, there is a circular profile picture placeholder with the letter "A" (3) and an "Upload" button (4). Below this are four text input fields: "First Name \*" (5), "Last Name \*" (6), "Email Address \*" (7), and "Phone Number \*" (8). At the bottom right, there are two buttons: a red "X Cancel" button (9) and a teal "Save" button (10).

Instructions:

**1. Section: Contact/Agent (Label)**

This section identifies that the user is adding or editing a contact or agent.

**2. Default: "Contact/Agent"**

Subsection: Contact/Agent Information

This area provides the main form fields for adding contact/agent information.

**3. Profile Image Placeholder**

Displays a default icon where the user can upload a profile image for the contact or agent.

**4. Upload Button (Profile Image)**

Allows the user to upload a profile image for the contact or agent.

**5. First Name Field**

A required input field for entering the first name of the contact/agent.

Field is mandatory.

**6. Last Name Field**

An input field for entering the last name of the contact/agent.

Field is mandatory.

**7. Email Address Field**

A required input field for entering the contact/agent's email address.

Field is mandatory.

**8. Phone Number Field**

A required input field for entering the contact/agent's phone number.

Field is mandatory.

**9. Cancel Button**

Allows the user to cancel the entry and return to the previous screen without saving changes.

**10. Save Button**

Saves the entered information for the contact or agent

- Venue

**Venue** — 1

**Venue Information** — 2

**Name \*** — 3

**Description** — 4

Latitude — 5: -14.354621394926385

Longitude — 6: 31.76230056762695

**Address Line 1** — 7

**Address Line 2** — 8

**Country** — 9

**State/Province** — 10

**City** — 11

**Zip/Postal Code** — 12

**Map Information** — 13

Enter a location — 15

Clear Secondary — 17

Use Secondary Location Coordinates — 18

Secondary Location — 21

Primary Location — 20

Click on the map to drop a pin.

Cancel — 23

Save — 22

Instructions:

**1. Section: Venue (Label)**

This identifies the section for adding or editing a venue.

**2. Subsection: Venue Information**

This area contains the form fields where venue details are provided.

**3. Name Field**

A required field for entering the name of the venue.

Field is mandatory.

**4. Description Field**

An optional field to enter a description of the venue, providing additional information.

**5. Latitude Field**

Displays or allows input for the venue's latitude coordinates, automatically filled if a location is selected on the map.

**6. Longitude Field**

Displays or allows input for the venue's longitude coordinates, automatically filled if a location is selected on the map.

**7. Address Line 1 Field**

An input field for the first line of the venue's address.

**8. Address Line 2 Field**

An optional input field for the second line of the venue's address (e.g., suite number, building).

**9. Country Field**

Allows the user to enter the country where the venue is located.

**10. State/Province Field**

Field for entering the state or province of the venue.

**11. City Field**

An input field for the city where the venue is located.

**12. Zip/Postal Code Field**

A field to input the zip or postal code for the venue.

**Map Section**

**13. Section: Map Information (Label)**

This section provides a visual map interface for selecting or entering venue locations.

**14. Zoom In Action (+)**

A button that allows the user to zoom in on the map for a closer view of the location.

**15. Zoom Out Action (-)**

A button that allows the user to zoom out on the map for a wider view of the area.

**16. Search/Location Input Field**

A search box where users can type in a location, which will automatically place a pin on the map based on the entered location.

**17. Clear Secondary Location Button**

A button that clears any secondary location selected on the map.

Removes secondary coordinates and resets the secondary pin on the map.

**18. Secondary Location Button**

Enables the user to input and mark a secondary location on the map.

**19. Map Area**

Interactive map for dropping location pins.

The user can drag the pin to set or adjust the venue location, and this updates the latitude and longitude fields.

**20. Primary Location Pin (Red)**

The pin marking the primary venue location on the map.

Default: Red Pin

**21. Secondary Location Pin (Blue)**

The pin marking the secondary location on the map (if applicable).

Default: Blue Pin

**22. Save Button**

Saves the entered venue and map information.

Saves the input details and closes the form.

**23. Cancel Button**

Allows the user to cancel the operation and return to the previous screen without saving.

Discards any input and closes the form.

- Bank Details

The image shows a 'Bank Details' form with the following elements and callouts:

- 1**: The main title 'Bank Details' at the top left of the form.
- 2**: A sub-title 'Bank Details' inside a rounded rectangular container.
- 3**: The 'Name \*' input field, which is highlighted with a red border.
- 4**: The 'Description' input field.
- 5**: The 'Bank Name \*' input field.
- 6**: The 'Account Number \*' input field.
- 7**: The 'Branch Code \*' input field.
- 8**: The 'Branch Name \*' input field.
- 9**: The 'SWIFT Code' input field.
- 10**: The 'Cancel' button, which is red with a white 'X' icon.
- 11**: The 'Save' button, which is teal with a white floppy disk icon.

Instructions:

**1. Section: Bank Details**

This section identifies that the user is adding bank details.

**2. Subsection: Bank Details**

This area contains the form fields where bank-related information is entered.

**3. Name Field**

A required input field for entering the name of the account holder or the bank account's label/identifier.

Field is mandatory.

**4. Description Field**

An optional field for entering additional details or notes about the bank account.

**5. Bank Name Field**

A required input field for entering the name of the bank associated with the account.

Field is mandatory.

**6. Account Number Field**

An input field for entering the bank account number.

Field is mandatory.

**7. Branch Code Field**

A required input field for entering the branch code of the bank.

Field is mandatory.

**8. Branch Name Field**

A required input field for entering the branch name of the bank.

Field is mandatory.

**9. SWIFT Code Field**

An optional input field for entering the SWIFT code for international transactions.

**10. Cancel Button**

Allows the user to cancel the operation and return to the previous screen without saving any changes.

Cancels the input and closes the form.

**11. Save Button**

Saves the entered bank details.

Saves the input information and closes the form.

- Default Increment Table

Increment Tables —①

Increment Table —②

Name \* —③

Description —④

Increment Breakdown —⑤

The increments below will be applied to each lot where this increment table is selected.

Please ensure that you read the below:

- At least one entry must be added for this increment table.
- The 'To Amount' must be greater than the 'From Amount'.
- All issues will be highlighted, per entry, in red.
- The last entry will be used as the final increment for each lot.

From Amount —⑥	To Amount —⑦	Increment —⑧	⑨ +
R 0.00 —⑥.1	To Amount * R 0.00 —⑦.1	Increment * R 0.00 —⑧.1	⑩

⑪ X Cancel   ⑫ Save

Instructions:

**1. Section: Increment Tables**

Identifies that the user is adding or editing an increment table.

**2. Subsection: Increment Table**

This area contains the form fields for entering increment table information.

**3. Name Field**

A required input field for entering the name of the increment table.

Field is mandatory.

**4. Description Field**

An optional field for entering additional details or notes about the increment table.

**5. Increment Breakdown (Label & Instructions)**

This section allows the user to define increments applied to each lot where the table is used.

**6. From Amount Field**

An input field for entering the starting amount for the increment range.

**6.1. From Amount Value**

Shows the default value of "From Amount" as R 0.00 for new increment entries.

Default: "R 0.00"

**7. To Amount Field**

A required input field for entering the ending amount for the increment range.

Field is mandatory.

**7.1. To Amount Value**

Shows the default value of "To Amount" as R 0.00 for new increment entries.

Default: "R 0.00"

**8. Increment Field**

A required input field for defining the increment value applied between the specified "From Amount" and "To Amount."

Field is mandatory.

**8.1. Increment Value**

Shows the default value of "Increment" as R 0.00 for new increment entries.

Default: "R 0.00"

**9. Add Increment Button "+" (Add Increment)**

A button used to add a new increment row to the table.

**10. Delete Increment Button (Trash Icon)**

A button used to delete an increment entry from the table.

### **11. Cancel Button**

Allows the user to cancel the operation and return to the previous screen without saving any changes.

Cancels the input and closes the form.

### **12. Save Button**

Saves the entered increment table details.

Saves the input information and closes the for

- Bidding Calculations - Part 1

**Bidding Calculations** <sup>1</sup>

**Bidding Calculations** <sup>2</sup>

These calculations determine the invoice totals and are used for invoicing. They will be displayed to bidders to inform them of their liabilities during bidding.

Please ensure all related fees, commissions, and taxes are included as invoices are automatically generated. These calculations are used **PER LOT**.  
 Order: Enter the calculations in the order of their execution.

Name \* <sup>3</sup>

Description <sup>4</sup>

**Example Costs** <sup>5</sup>

The values entered below will be replaced using the actual values configured or submitted for a lot and are simply used for demonstration purposes of the calculations.

Description <sup>6</sup>	Type <sup>7</sup>	Amount <sup>8</sup>	Calculated From <sup>9</sup>	Summary (Cumulative Total) <sup>10</sup>
Bid Amount <sup>11</sup>	Numeric Value <sup>12</sup>	R 0.00 <sup>13</sup>	N/A <sup>14</sup>	R 0.00 <sup>15</sup>
Buyers Commission <sup>16</sup>	Percentage <sup>17</sup>	% 0.00 <sup>18</sup>	Bid Amount <sup>19</sup>	R 0.00 <sup>20</sup>

## Instructions:

### **1. Bidding Calculations**

The main title of the section, which contains information related to the calculations for invoices during the bidding process.

This section ensures all fees, commissions, and taxes are calculated correctly and informs bidders of their liabilities.

### **2. Bidding Calculations Subtitle**

A subheading that reiterates the section title, focusing on the details related to calculations used for invoicing bidders.

### **3. Name**

A required field where users can enter the name of the bidding calculation. The name helps identify the specific calculation being applied to a lot.

### **4. Description**

A field where users can add a description of the bidding calculation for better understanding or categorization.

### **5. Example Costs**

A section that displays example costs for demonstration purposes. The actual values in this section will be replaced with configured or submitted values for a lot during the bidding process. This is used to illustrate how calculations are applied.

### **6. Description**

The description of the cost or fee being applied (e.g., Bid Amount, Buyers Commission). This field explains what each line represents in the overall bidding calculation.

#### **6.1 Bid Amount**

Refers to the monetary value of the bid for a specific lot.

#### **6.2 Buyers Commission**

Refers to the commission percentage that the buyer is expected to pay, based on the bid amount.

### **7. Type**

The type of the cost or fee being applied. This can vary depending on the value being used (e.g., Numeric Value or Percentage).

#### **7.1 Numeric Value**

The type used for the Bid Amount, indicating it's a number value.

#### **7.2 Percentage**

The type used for the Buyers Commission, indicating it's a percentage of the Bid Amount.

## **8. Amount**

The monetary value associated with the specific cost or fee in question. For example, it could show the bid amount or the commission amount, typically in currency form.

### **8.1 R 0.00**

Placeholder amount for the Bid Amount, demonstrating the value being calculated.

### **8.2 Bid Amount**

This indicates that the Buyers Commission is calculated as a percentage of the Bid Amount.

## **9. Calculated From**

This field shows the basis of the calculation. For instance, some amounts might be calculated from the bid amount, while others might be a set value or percentage.

### **9.1 N/A**

Indicates that no calculation basis is needed for the Bid Amount itself, as it's the primary value.

### **9.2 Bid Amount**

Indicates that the Buyers Commission is calculated from the Bid Amount.

## **10. Summary (Cumulative Total)**

This field shows the cumulative total of the calculations applied. It sums up the values for easier review and tracking.

### **10.1 R 0.00**

Cumulative total for the Bid Amount, currently set as R 0.00 in the example.

### **10.2 R 0.00**

Cumulative total for the Buyers Commission, calculated as R 0.00 in the example.

- Bidding Calculations - Part 2

### Additional Costs 11

The calculations below will be applied to each lot where this bidding calculation is selected.

Description <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">12</span>	Type <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">13</span>	Amount <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">14</span>	Calculated From <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">15</span>	Summary (Cumulative Total) <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">16</span>	<span style="border: 1px solid black; border-radius: 50%; padding: 2px;">17</span>
Test 1 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">12.1</span>	Percentage <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">13.1</span>	% 0.00 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">14.1</span>	Cumulative Total <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">15.1</span>	R 0.00 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">16.1</span>	<span style="border: 1px solid black; border-radius: 50%; padding: 2px;">18</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">17</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">18</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">19</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">20</span>
Test 2 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">12.1</span>	Percentage <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">13.1</span> Numeric Value <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">13.1.1</span> Percentage <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">13.1.2</span>	% 0.00 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">14.1</span>	Cumulative Total <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">15.1</span> Bid Amount <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">15.1.1</span> Cumulative Total <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">15.1.2</span>	R 0.00 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">16.1</span>	<span style="border: 1px solid black; border-radius: 50%; padding: 2px;">19</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">20</span>

## Instructions:

### **11. Additional Costs**

This section represents extra costs that will be applied to each lot, depending on the bidding calculation selected.

### **12. Description**

A label or name for the additional cost calculation. This helps identify what each cost refers to.

**12.1** Examples like "Test 1" and "Test 2" serve as placeholders for real cost names.

### **13. Type**

Defines the nature of the calculation, whether it's a Percentage or Numeric Value.

**13.1** Dropdown options to choose between Numeric Value or Percentage.

**13.1.1** "Cumulative Total" is currently selected.

**13.1.2** "Bid Amount" is another option available in the dropdown.

### **14. Amount**

This field represents the value of the additional cost, whether a flat amount or a percentage.

**14.1** Indicates that the current cost is a percentage amount (e.g., % 0.00).

### **15. Calculated From**

Specifies the basis from which the amount is calculated. It could be based on the Bid Amount or Cumulative Total.

**15.1** Dropdown to select whether the calculation is done from the Bid Amount or the Cumulative Total.

**15.1.1** "Bid Amount" is one of the options available in the dropdown.

**15.1.2** "Cumulative Total" is another option, indicating it's currently selected.

### **16. Summary (Cumulative Total)**

The total cumulative cost after applying all additional calculations.

**16.1** Display of the current cumulative total, set to R 0.00 initially.

### **17. Add Button**

Allows adding a new additional cost entry to the list.

### **18. Down Arrow**

A down arrow button used for reordering the items in the list. It moves the calculation down in the sequence.

### **19. Up Arrow**

A button to reorder the additional cost by moving it upward in the list.

### **20. Delete Button**

Allows the deletion of an additional cost entry.

- Bidding Calculations Adding Vat - Part 3

**Add VAT**  21

VAT will be applicable on all items above and added to the cumulative total of all costs configured for the Lot.

Description 22	Type 23	Amount 24	Calculated From 25	Calculated Value 26
VAT 22.1	Percentage 23.1	% 15.00 24.1	Cumulative Total 25.1	R 0.00 26.1
<b>Example Total 27</b>				<b>R 0.00 28</b>

30

29

Instructions:

**21. Add VAT**

This is the heading of the section where VAT details can be added.

**22. Description**

A field where the description of the item is entered.

**22.1 VAT**

Vat will be applicable to all items and added to the cumulative total of all costs configured for the lot. This note explains that VAT will be applied to the listed items and added to the overall total.

**23. Type**

A field to specify the type of calculation to apply.

**23.1 Percentage:**

This specifies that the VAT will be applied as a percentage.

**24. Amount**

A field to input the VAT percentage for the item.

**24.1 % 15.00:**

The VAT percentage is currently set at 15.00%.

**25. Calculated From**

This field indicates the basis from which VAT is calculated.

**25.1 Cumulative Total:**

Displays the total amount, with VAT applied, currently shown as R 0.00.

**26. Calculated Value**

This displays the value after VAT has been calculated.

**26.1 R 0.00:**

Shows the calculated value, currently shown as R 0.00.

**27. Example Total**

Displays an example total.

**28. Cumulative Total**

Shows the total amount including VAT, currently displayed as R 0.00.

**29. Cancel Button**

Allows the user to cancel the operation and return to the previous screen without saving and changes.

    Cancels the input and closes the form.

**30. Save Button**

    Saves the input information and closes the for

- Bidding Calculations No Vat - Part 4

Add VAT  ①

VAT not applicable ②

---

**Example Total** ③ **R 0.00** ④

---

⑤   ⑥

Instructions:

**1. Add VAT**

This section allows you to toggle whether VAT should be added to the transaction.

**2. VAT Not Applicable**

This label indicates that VAT is currently not being applied. There is an information icon next to it, suggesting that more details about VAT can be viewed if needed.

**3. Example Total**

Displays the total amount after calculations are applied.

**4. R 0.00:**

The current value of the example total, shown as R 0.00.

**5. Cancel**

Allows the user to cancel the operation and return to the previous screen without saving any changes.

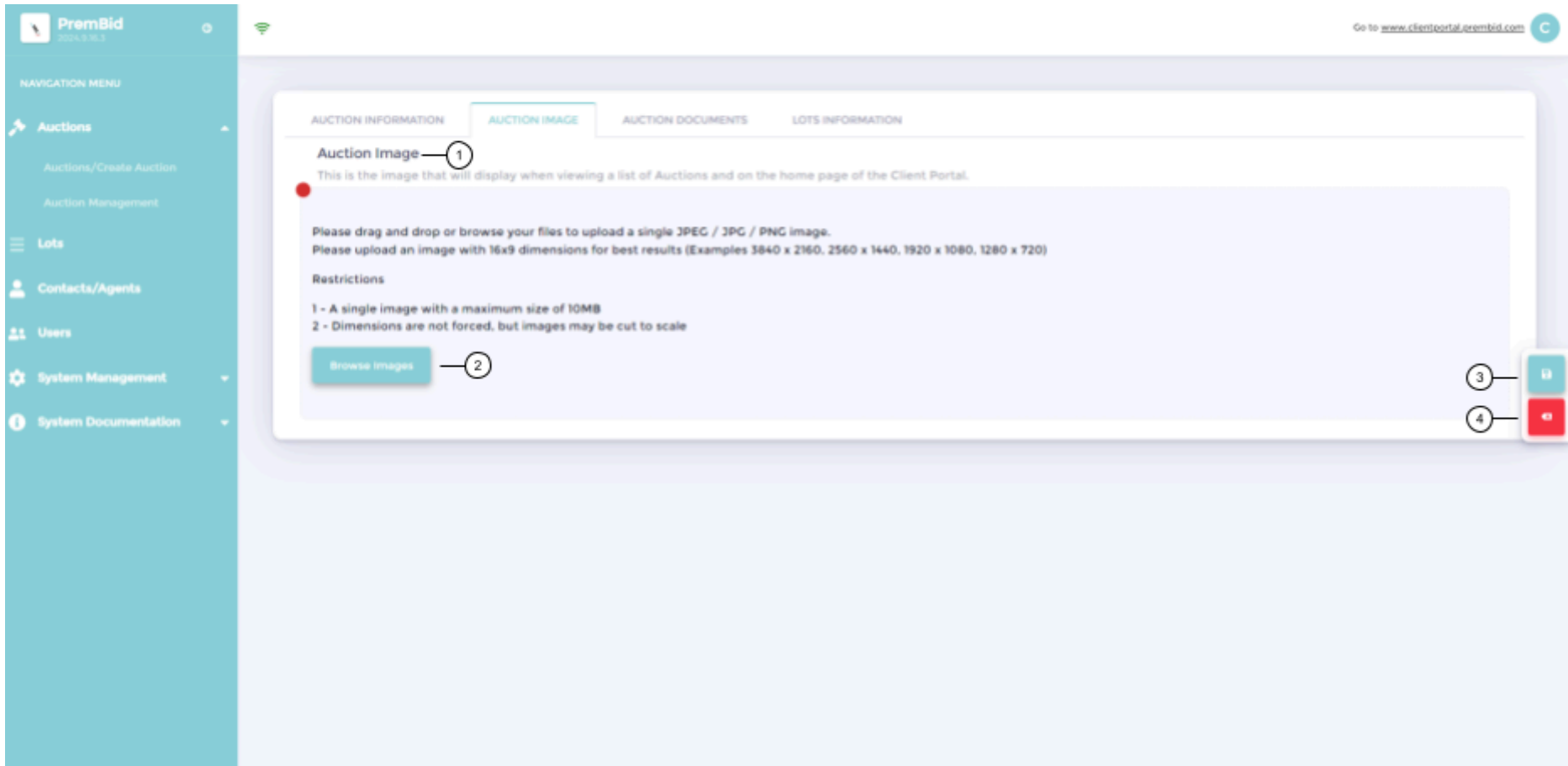
Cancels the input and closes the form.

**6. Save**

Saves the input information and closes the for

# Adding An Auction Image





## Timed, Tender, Streamed



Follow the steps:

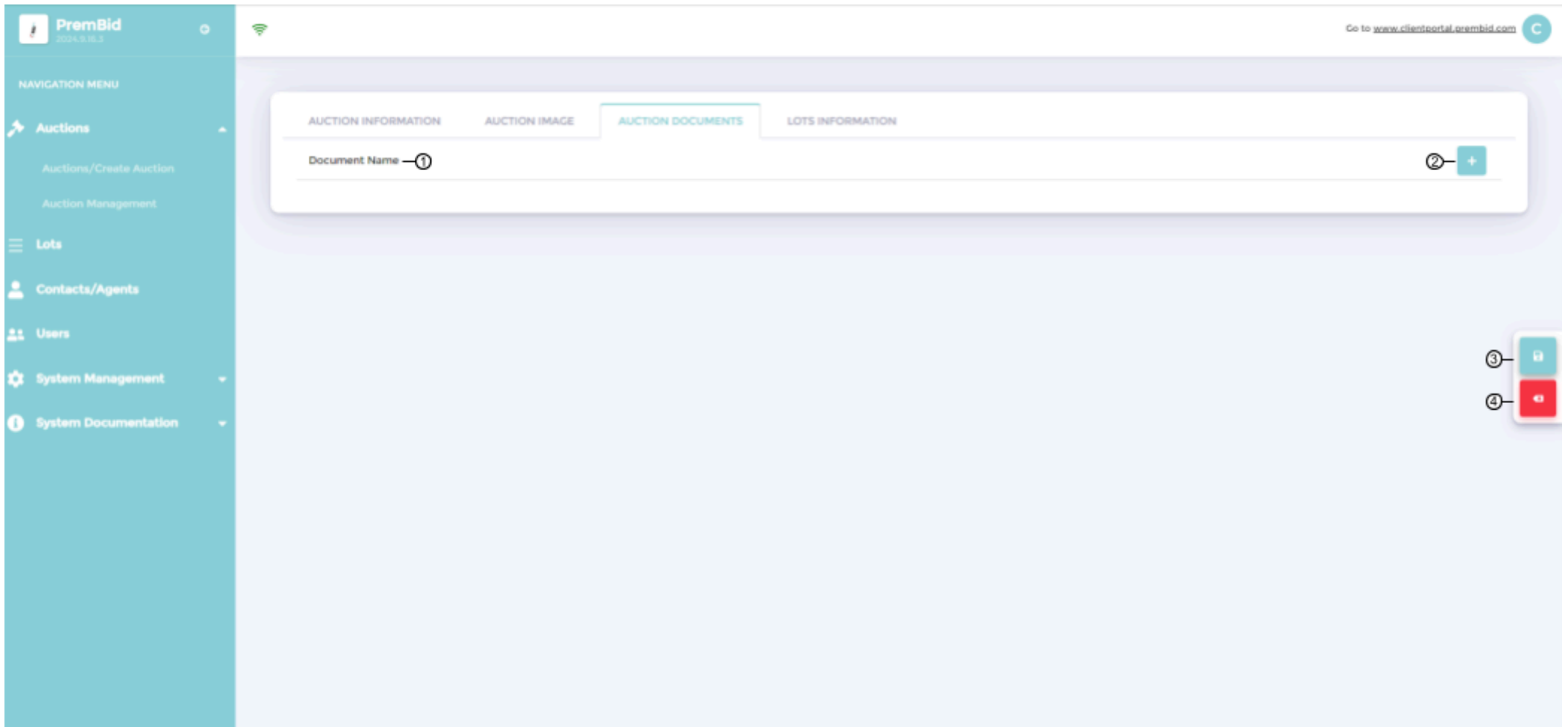
## **Auction Image Section**

1. **Auction Image:** This screen allows you to upload the image that will be displayed as the Auction banner image when viewing a list of auctions or on the homepage of the Client Portal.
  - Click the “Drag and Drop” text box or the **Browse Images** button, and a directory browser will appear so that you can choose the image you wish to upload as the Auction banner image.
  - Please upload a single JPEG, JPG, or PNG image. The suggested dimensions are 16:9 for best results (e.g., 3840 x 2160, 2560 x 1440, 1920 x 1080, 1280 x 720).
2. **Browse Images Button:** This button allows you to either drag-and-drop or browse your files to select an image for upload.
  - **Restrictions:**
    1. A single image with a maximum size of 10MB.
    2. Dimensions are not forced, but images may be cut to scale.
3. **Save Button (Green):** Once you've uploaded the image, click this button to save the changes and apply the new auction banner image.
4. **Delete Button (Red):** If you need to remove the selected image, click this button to delete the uploaded image.
  - Clicking the **Back** button (not shown in the image) will redirect you to the **Auctions** screen.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
 <p>Please drag and drop or browse your files to upload a single JPEG / JPG / PNG image. Please upload an image with 16x9 dimensions for best results (Examples 3840 x 2160, 2560 x 1440, 1920 x 1080, 1280 x 720)</p> <p>Restrictions</p> <p>1 - A single image with a maximum size of 10MB 2 - Dimensions are not forced, but images may be cut to scale</p> <p>Browse Images</p>	<b><i>Auction Image</i></b>	<b><i>Auction image. This image will appear as the main Auction and cover image on the PremBid client portal.</i></b>
	<b><i>Drop Image/ Browse Upload Image</i></b>	<b><i>Drag and drop files here, JPEG / JPG / PNG images. Max of 1 image with 16x9 dimensions for best results (Examples 3840 x 2160, 2560 x 1440, 1920 x 1080, 1280 x 720). Maximum size of 10MB.</i></b>
	<b><i>Save button</i></b>	<b><i>Clicking the button will save the Auction information that has already been filled in.</i></b>
	<b><i>Back button</i></b>	<b><i>Clicking this will discard all unsaved data and will redirect you to the "Auctions" screen.</i></b>

# Adding Auction Documents

## Timed, Tender, Streamed



## Documents modal

The image shows a modal dialog box titled "Documents" with a close button (1). Below the title is the instruction "Select documents you want to add". A list of document types follows, each with a toggle switch (3) and a callout number (4) pointing to the switch. The list includes "Auction Kishav", "Auction\_Access Controlled", "Auction\_Registration Document", "Auction\_Acceptance Required", "Auction Kishav 2", "Auction\_Upload Required", "Auction doc JPG Reg Wizard", "Auction doc PDF Reg Wizard", "Auction doc PNG Reg Wizard", "Upload Required Apply To Document Type", "Acceptance Required Apply To Document Type Registration Document", and "Porky 1". At the bottom, there are two buttons: a red "Cancel" button (5) and a teal "Ok" button (6).

Document Type	Selection Status
Auction Kishav	Off
Auction_Access Controlled	On
Auction_Registration Document	Off
Auction_Acceptance Required	Off
Auction Kishav 2	Off
Auction_Upload Required	Off
Auction doc JPG Reg Wizard	Off
Auction doc PDF Reg Wizard	Off
Auction doc PNG Reg Wizard	Off
Upload Required Apply To Document Type	Off
Acceptance Required Apply To Document Type Registration Document	Off
Porky 1	Off

## Document uploads

①

AUCTION INFORMATION   AUCTION IMAGE   **AUCTION DOCUMENTS**   LOTS INFORMATION

Document Name — ① ⑥ +

Auction\_Access Controlled — ② ③

Auction\_Acceptance Required

Auction\_Upload Required ④

Auction doc JPG Reg Wizard   ⑤

Auction\_Registration Document   ⑦

⑧

## Instructions:

### **Auction Documents Section**

1. **Document Name:** This field displays the name of the document being added to the auction.
2. **Add Button:** Clicking this "+" button allows the user to add new documents to the auction.
3. **Save Icon:** This icon allows you to save the added documents/ no added documents on the auction.
4. **Delete Button:** Clicking this red button removes the selected document from the auction.

### **Process Explanation:**

1. The **Auction Documents** screen displays all the documents that can be added to the auction.
2. Click the **Add** button (2), which will open a modal containing the available documents that can be added to the auction.
3. If the upload of a document is required, an **Upload** button will appear for that document template. However, not all document templates will require an upload.
4. Once added, documents can be deleted using the **Delete Button** (4), respectively.
5. To save the changes, click the **Save** button, and to return to the previous screen, click the **Back** button.

## Documents Modal

1. **Documents:** This is the title of the modal window, indicating that you are selecting documents to add to the auction.
2. **Document List:** A list of available documents that can be toggled on or off for inclusion in the auction.
  - **2. Toggle for Auction Kishav:** A switch to enable or disable adding the "Auction Kishav" document.
  - **3. Toggle for Auction\_Access Controlled:** A switch to enable or disable adding the "Auction\_Access Controlled" document, which is currently enabled.
4. **Cancel Button:** In red, this button closes the modal without saving the selected documents.
5. **Ok Button:** In green, this button confirms and saves the selected documents for the auction.

## Auction Documents Screen (With Added Documents)

1. **Document Name:** This is the title of the section where you can add or manage auction documents.
2. **Example Document Name:** "Auction\_Access Controlled" is an example of a document name that has been added to the auction.
3. **Upload Required Button:**
  - Click the blue upload button to upload a required document for the selected entry, like "Auction\_Access Controlled." This indicates that a document upload is necessary for this particular document.
4. **No Upload Required:** This entry, such as "Auction\_Acceptance Required," does not need a document upload, and therefore no upload button is shown.
5. **Delete Button:**
  - Click the red trash icon to remove a document from the list.
6. **Add Button:**
  - Click the blue "+" button to add a new document to the auction list.
7. **Save Button:**
  - Click the green "Save" button to save all added or modified documents to the auction.
8. **Back Button:**
  - Click the red "Back" button to return to the previous screen. Note that if any documents were added but not saved, they will need to be re-uploaded after navigating back to the screen.

## Instructions:

### 1. **Adding a Document:**

- Click the "+" (Add) button to add a new document.
- Use the document modal to select and add documents, and click "Ok" to save them.

### 2. **Uploading a Document:**

- For documents that require an upload (like "Auction\_Access Controlled"), click the blue upload button and follow the instructions to upload the required file.

### 3. **Managing Documents:**

- To move a document's position, click the up arrow next to it.
- If a document doesn't require an upload, no upload button will be displayed (e.g., "Auction\_Acceptance Required").

### 4. **Deleting a Document:**

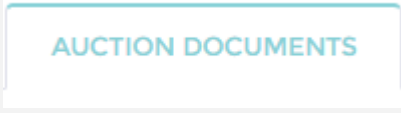




- To remove a document from the auction, click the red trash icon next to it.

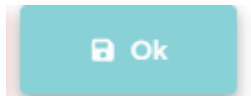
### 5. **Saving Documents:**

- Once you've made all your changes, click the "Save" button to ensure all documents are added or updated.

### 6. **Going Back:**

- If you click the "Back" button without saving, any documents you added will need to be uploaded again when you return.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Auction Documents	View the documents attached to the Auction. <b>Note:</b> This will be blank until you add documents to the Auction.
	Add an Auction Documents	Select the “ <b>Add</b> ” button to open the modal window where you can select documents to add.
	Document not active	Switch the toggle to the <b>left</b> to disable it.
	Document active	Switch the toggle to the <b>right</b> to enable the document
	Cancel	Select “ <b>Cancel</b> ” to exit without saving.



Okay

Select "**Ok**" to save the selected documents



Upload Document

Select to "**Upload**" the necessary document.



Delete Document

Select to "**Delete**" the desired document.



Save

Select to "**Save**" the added documents for the Auction.



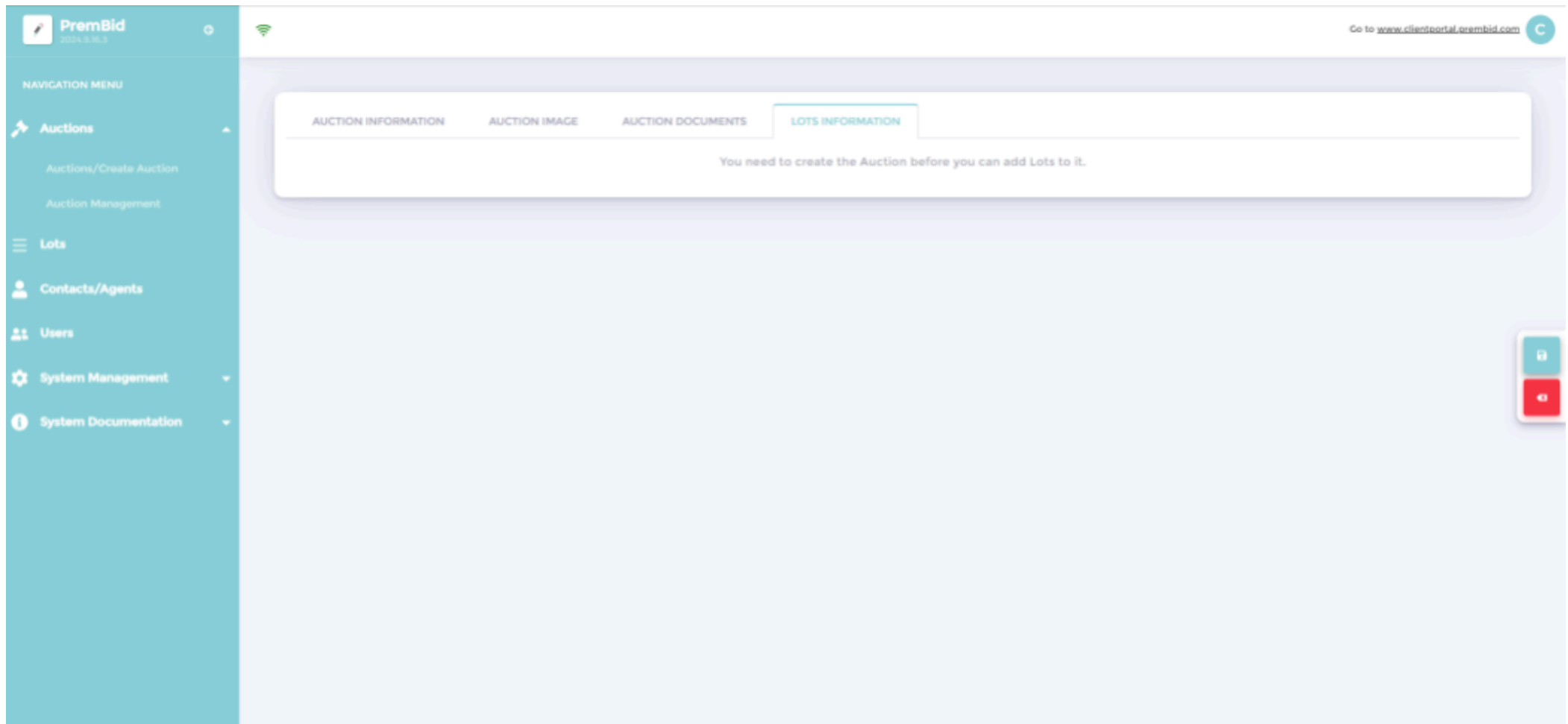
Back

Selecting the "**Back**" button will redirect you to the "Auctions" screen.

**Note:** Selecting the "**Back**" button without saving, any documents you added will need to be uploaded again when you return.

## Adding An Auction (Lots Information - Unsaved Auction)

### Timed, Tender, Streamed



## Instructions:

### 1. Before Adding a Lot:

- First, ensure that the auction has been saved. Once the auction is saved, you can press the “Add” button to add lots.

### 2. Lot Information Display:

- This screen shows all the **Lots** associated with the specific auction. Each Lot linked to the auction will be listed here.

### 3. Redirect to Lot Information:

- When you add or edit a lot, you will be redirected to the **Lot Information** screen. For detailed instructions

### 4. Search for a Lot:

- You can use the **Search** bar to search for any Lot that is loaded under this auction.

### 5. Reorder Lots:

- Clicking the “Reorder” button will take you to the **Reordering Screen** to adjust the order of Lots.

### 6. Linking and Unlinking Lots:

- You can either “Link” or “Unlink” a Lot.
- If you choose to “Unlink” a Lot, a confirmation modal will appear, allowing you to confirm or cancel the action.
- **Link Individual Lots:** To link a lot, click the “Link Individual Lot” button, which will open a modal with all available individual lots for linking.

### 7. Editing and Deleting Lots:

- **Step:** Once a Lot has been saved, you can either **edit** or **delete** the Lot.
  - To **edit**, click the "Edit" icon, and you will be redirected to the **Lot Information** screen.
  - To **delete**, click the "Delete" icon to remove the Lot.

### 8. Bulk Upload of Lots:

- You can add lots either singularly (one by one) or use the **bulk upload** button to upload multiple lots at once.
- The bulk upload option allows you to add specific data for multiple lots simultaneously, saving time compared to uploading lots one by one (e.g., 20 lots at once).

**9. Lot Details Dropdown:**

- Clicking the **Drop-down Arrow** will display all relevant information related to the selected Lot.

**10. Delete Auction:**

- To delete the entire auction, click the **Delete** button.

**11. Save Auction:**

- After adding or editing lots, click the **Save** button to ensure that all changes to the auction are saved.

**12. Go Back to Auctions:**

- Clicking the “Back” button will return you to the main **Auctions** screen.

**13. Filter Available Lots:**

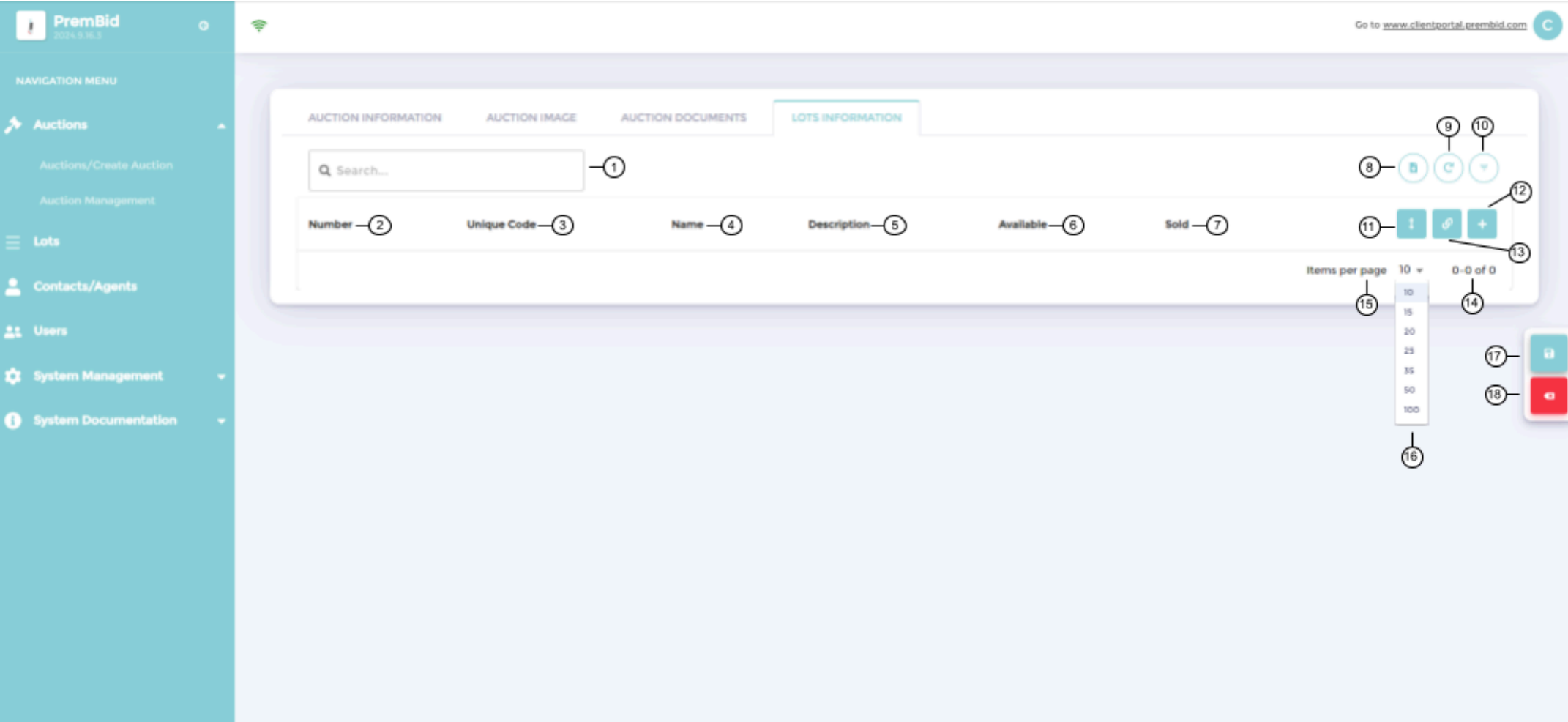
- You can filter the displayed Lots by clicking the “Available” filter to only show lots that are currently available.

**14. Refresh Screen:**

- Use the **Refresh** button to ensure that the screen displays the most up-to-date information

(Lots Information - Saved Auction) - No Lots

Timed, Tender, Streamed



## Instructions:

### **1. Search Bar**

- Use the search bar to quickly find specific Lots by name or other identifiers.

### **2. Number**

- This column displays the Lot number assigned to each item within the auction.

### **3. Unique Code**

- Shows the unique code for each Lot, which is used for identification purposes.

### **4. Name**

- This column lists the name of each Lot in the auction.

### **5. Description**

- Shows a brief description of each Lot.

### **6. Available**

- Indicates whether the Lot is currently available for bidding.

### **7. Sold**

- Displays whether the Lot has been sold in the auction.

### **8. Bulk Upload Option**

- Allows for bulk uploading of multiple Lots at once. This is useful when you need to upload multiple Lots with their respective details.

### **9. Refresh**

- Click the Refresh button to reload and update the screen with the latest data.

### **10. Filter**

- Use the Filter option to filter the Lots displayed based on certain criteria, such as availability.

### **11. Reorder Lots**

- Click the Reorder button to change the order in which the Lots appear. You will be redirected to the Reordering Screen.

### **12. Add a Lot**

- Click the Add button to add a new Lot to the auction. This will redirect you to the Lot Information screen.

### **13. Link a Lot**

- This button allows you to Link an existing Lot to the auction. Clicking this will open a modal displaying all available Lots for linking.

#### **14. Delete Auction**

- The Delete button allows you to delete the entire auction.

#### **15. Items Per Page**

- Use the drop-down menu to adjust how many Lots are shown per page. You can choose from options like 10, 20, 25, etc.

#### **16. Pagination Controls**

- Use these buttons to navigate between pages if there are more Lots than can be displayed on one page.

#### **17. Save**

- After making changes, click the Save button to apply and save any modifications made to the Lots or auction details.

#### **18. Back**

- Clicking the Back button will return you to the Auctions screen. If documents or Lots have been added but not saved, you will need to re-upload them when returning.

## (Lots Information - Saved Auction) - Added Lots

### Timed, Tender, Streamed

The screenshot displays the 'LOTS INFORMATION' tab of an auction management system. It features a search bar at the top left and a table of lots below. The table has columns for Number, Unique Code, Name, Description, Available, and Sold. Each row represents a lot with its respective details and status. To the right of the table, there are several action buttons for each lot, including a red 'X' button, a teal checkmark button, and a red trash can button. Below the table, there are sections for 'Custom Data' and 'Lot Data', followed by a summary of lot type and registration details. A vertical sidebar on the right contains additional navigation and action buttons.

Number	Unique Code	Name	Description	Available	Sold	
1	PP103306	Test 1	Numnum 1	No	No	[Action Buttons]
Custom Data						
Lot Data						
Lot Type: Porky 3 STC Status: No Registration Deposit Amount (R): 80 Default Minimum Increment (R): 1000 Buyer's Commission %: 1 Opening Bid (R): 500 Reserve Price (R): 10000 SKU Number:						
2	PP103307	Test 2	Numnum 2	Yes	Yes	[Action Buttons]
3	PP103308	Test 3	Numnum 3	Yes	No	[Action Buttons]
4	PP103309	Test 4	Numnum 4	No	Yes	[Action Buttons]

## Instructions:

### 1. **Search Bar**

- Allows you to search for specific Lots associated with the Auction.

### 2. **Lot Number**

- The assigned number for each Lot.

### 3. **Unique Code**

- A unique identifier code for each Lot.

### 4. **Lot Name**

- Displays the name of each Lot.

### 5. **Description**

- A brief description of the Lot.

### 6. **Available Status**

- 6.1 Displays "Yes" or "No" depending on the availability of the Lot.

### 7. **Sold Status**

- 7.1 Displays "Yes" or "No" depending on whether the Lot has been sold.

### 8. **Bulk Upload**

- Click here to upload multiple Lots at once.

### 9. **Refresh**

- Refreshes the screen to ensure you have the latest data.

### 10. **Filter**

- Allows filtering of the Lots data.

### 11. **Reorder Lots**

- Enables you to reorder the Lots in the auction.

### 12. **Link Lots**

- Allows linking of individual Lots to the Auction.

### 13. **Add Lot**

- Adds a new Lot to the Auction.

### 14. **Unlink Lot**

- Unlink the individual Lot from the Auction. A confirmation pop-up will appear to confirm the action.

### 15. **Expand/Collapse Lot Details**

- Expands or collapses the Lot to show or hide details.

**16. Delete Lot**

- Removes a Lot from the Auction.

**17. Expand/Collapse Lot**

- Expands or collapses the Lot to show or hide details.

**18. Custom Data**

- Displays custom data related to the Lot (if applicable).

**19. Expand/Collapse Custom Data**

- Expands or collapses the custom data details for the Lot.

**20. Lot Data**

- Displays additional information related to each Lot (such as Lot Type, STC status, registration deposit amount, and other related values).

**21. Expand/Collapse Lot Data**






- Click to view or collapse the Lot data.

**22. Save**






- Saves any changes made to the Lots.

**23. Back**

- Returns to the previous screen.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Lots Information	Screen displays individual Lots added for the specific Auction.
	Search Lots	Allows you to search for specific lots within the auction by entering relevant keywords or terms.
	Bulk uploader	Click to upload multiple Lots at once using a bulk file upload option. This helps when managing multiple Lots efficiently.
	Refresh	Click to refresh the screen and ensure that all the data displayed is up-to-date.
	Filter	Filter the Lots by available/ unavailable, sold and not sold.

	Add A Lot	Redirects you to the Lot Information screen for adding a new individual lot to the auction.
	Linking Individual Lot	Opens a modal where you can link additional lots to the auction.
	Reorder Lot	Redirects you to the screen where you can change the order of lots in the auction.
	Edit	Click on the icon to edit the related Lot's information. You will be redirected to the "Lot Information" screen, where you can update the details of the selected lot.
	Unlink Lot from Auction	Click to unlink a Lot from an Auction. A confirmation modal will appear to either proceed with or cancel the action.
	Delete	Permanently deletes the selected lot or custom field. Be cautious, as this action cannot be undone.

		
	Save	Save any changes made to the current lot. Ensure you click <b>Save</b> before leaving the screen to retain changes.
	Back	Returns you to the previous screen. Unsaved changes will not be saved.
	Collapse	Click to collapse the Lot and hide the detailed information.
	Expand	Click to expand the Lot and view more detailed information related to the Lot.

## Adding a lot - Part 1

### Timed

**LOT INFORMATION**    LOT IMAGES    LOT VIDEOS    LOT DOCUMENTS

Name (Max 100 Characters)\* — 1

Lot Number\* — 3  
Auto Generated...

Description\* — 2

Lot Type\* — 4  
Residential Property — 5

Contact/Agent\* — 7  
Chante Eygelaar — 8

6 Display Location on Client Portal

16 Location

17 Latitude

18 Longitude

9 +  
10 -

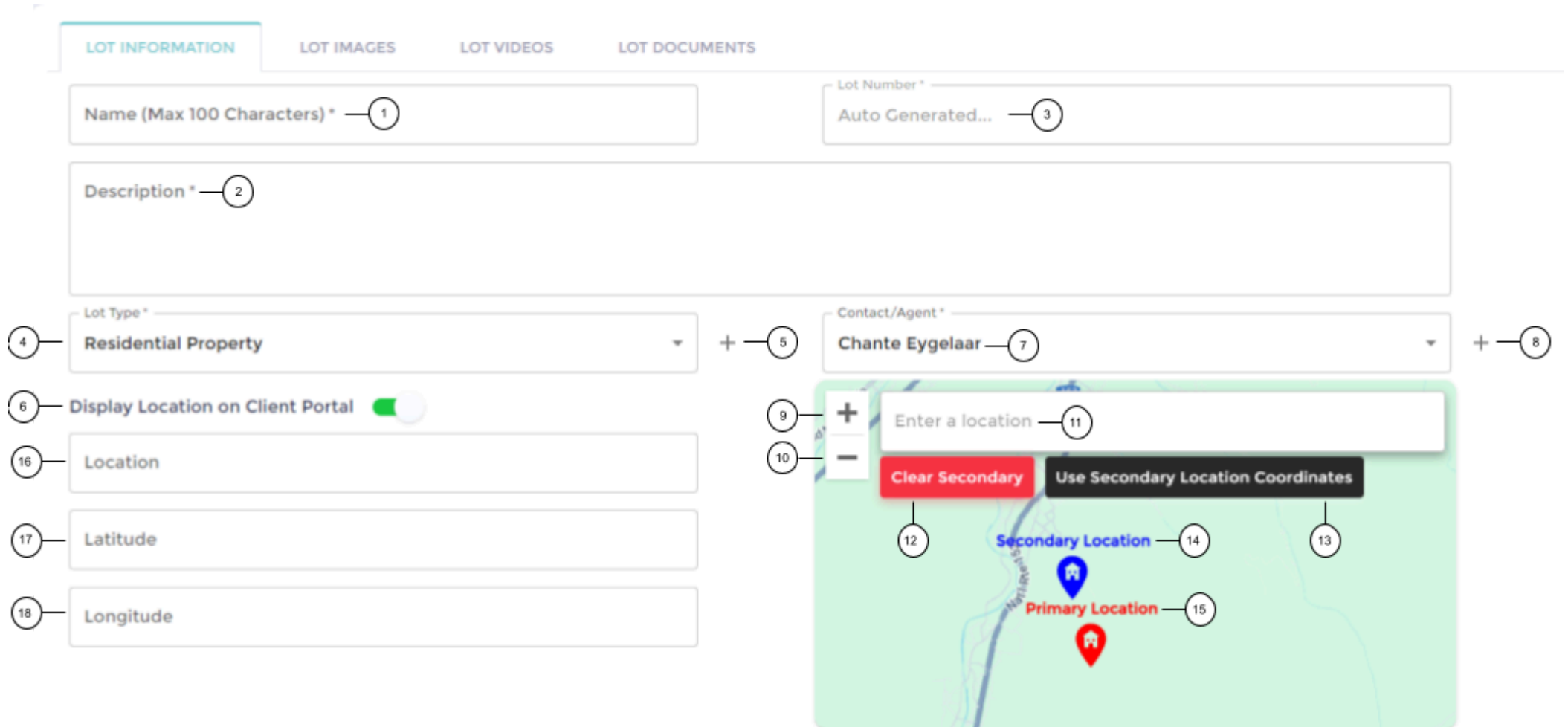
11 Enter a location

12 Clear Secondary

13 Use Secondary Location Coordinates

14 Secondary Location

15 Primary Location



The image shows a web form for adding a lot, divided into several sections. At the top, there are tabs for 'LOT INFORMATION', 'LOT IMAGES', 'LOT VIDEOS', and 'LOT DOCUMENTS'. The 'LOT INFORMATION' tab is active. The form includes fields for 'Name (Max 100 Characters)\*', 'Lot Number\*', 'Description\*', 'Lot Type\*', 'Contact/Agent\*', 'Display Location on Client Portal' (a toggle switch), 'Location', 'Latitude', and 'Longitude'. A map interface is also shown, featuring a search bar 'Enter a location', a 'Clear Secondary' button, a 'Use Secondary Location Coordinates' button, and two location markers: a blue 'Secondary Location' and a red 'Primary Location'. Numbered callouts (1-18) point to various elements in the form and map.

## Instructions:

### 1. **Name**

- Enter the Lot Name in this field. The name must be 100 characters or less.

### 2. **Description**

- Provide a description for the Lot. This field is mandatory.

### 3. **Lot Number**

- The Lot Number is auto-generated by the system and cannot be modified directly.

### 4. **Lot Type**

- Select the type of Lot from the dropdown menu. This defines the category of the Lot, such as "Residential Property," "Commercial Property," etc.

### 5. **Add Lot Type**

- Click the Plus (+) button to add a new Lot Type to the dropdown if the required type isn't listed.

### 6. **Display Location on Client Portal Toggle**

- Toggle this switch to True if you want the Lot's location to be visible on the Client Portal; set to False if you don't want the location displayed.

### 7. **Contact/Agent**

- Select the Contact/Agent responsible for the Lot from the dropdown menu.

### 8. **Add Contact/Agent**

- Click the Plus (+) button to add a new Contact/Agent if the necessary person isn't available in the dropdown list.

### 9. **Zoom In Map**

- Click the Plus (+) icon to zoom in on the map for a closer view of the Lot's location.

### 10. **Zoom Out Map**

- Click the Minus (-) icon to zoom out on the map for a wider view of the Lot's location.

### 11. **Search Bar for Location**

- Begin typing a location, and the system will help you search for the location on the map.

### 12. **Clear Secondary Location**

- Click the Clear Secondary button to remove any secondary location set for the Lot.

### 13. **Use Secondary Location Coordinates**

- If needed, use this button to input secondary location coordinates for the Lot.

**14. Secondary Location Marker**

- The Secondary Location is marked with a blue pin on the map, indicating an additional point of interest.

**15. Primary Location Marker**

- The Primary Location is marked with a red pin on the map, indicating the main Lot location.

**16. Location**

- Enter the address or geographical location of the Lot.

**17. Latitude**

- Enter the latitude coordinates of the Lot's primary location.

**18. Longitude**

- Enter the longitude coordinates of the Lot's primary location.

## Adding a lot - Part 2

Unique Code \*  
Auto Generated... — 19

Registration Deposit  
R 0.00 — 20

Buyer's Commission  
% 0.00 — 21

Opening Bid  
R 0.00 — 22

Late Bid Extension Window — 23  
Hours: 0 Mins: 0 Secs: 0

Late Bid Extension — 24  
Hours: 0 Mins: 0 Secs: 0

SKU Number — 25

Reserve Price  
R 0.00 — 26

Guide Price  
R 0.00 — 27

Please either create/use a default increment table or set a default increment

Increment Table \*  
Chante — 28 + — 29

OR

Increment \*  
R 0.00 — 30

Bidding Calculation — 31 + — 32

33 — Show when the Reserve is Met  STC Status  — 35  
34 — Watermark Images  Show Paddle Number  — 36

Available  — 37

Field — 38

39 — Related Information

40 — +

Field	Value
Property Type	
Bedrooms	

42 — - + — 41  
44 — + - + — 43

## Instructions:

### **19. Unique Code (Auto Generated)**

- Automatically generated unique identifiers for the lot.

### **20. Registration Deposit**

- Displays the registration deposit value for the lot, in this example set to R 0.00 (cannot be changed on this screen).

### **21. Buyer's Commission %**

- Enter the percentage of the buyer's commission for the lot.

### **22. Opening Bid**

- Opening bid is the suggested minimum bid for an auction item/lot.

### **23. Late Bid Extension Window:**

- Enter the time window for late bid extensions to apply. This can be customized for each Lot later. (Optional)

### **24. Late Bid Extension:**

- Fill in a default late bid extension time. If late bid extensions apply, the extension window (field 9) is mandatory. (Optional)

### **25. SKU Number**

- The SKU identifier for the lot, which can be entered manually.

### **26. Reserve Price**

- The minimum price that must be met for the lot to be sold (R 0.00).

### **27. Guide Price**

- A suggested price for the lot (R 0.00).

### **28. Increment Table:**

- Select an increment table from the drop-down menu or use the quick add button to add a new increment table. You can customize this for each Lot. (Mandatory)

### **29. Quick Add Increment Button "+" (Add Increment)**

- A button used to add a new increment row to the table.

### **30. Default Increment Amount:**

- If no increment table is selected, enter a default increment amount. This can be customized per Lot. (Mandatory)

### **31. Bidding Calculation**

- Dropdown for selecting the bidding calculation method.

### **32. Quick Add Icon Bidding Calculation**

- You can use this to create and add a new Default Bidding Calculation directly while setting up the auction.

### **33. Show when the Reserve is Met**

- Toggle for showing whether the reserve price has been met during the auction.

### **34. Watermark Images**

- Toggle for watermarking images associated with the lot.

### **35. STC Status**

- Toggle for the Subject to Confirmation (STC) status of the lot.

### **36. Show Paddle Number**

- Toggle to show the paddle number during bidding.

### **37. Available**

- Toggle indicating whether the lot is available for bidding (true/false toggle).

### **38. Field (Custom Field)**

- A custom field where you can enter the name of a field for related information (e.g., "Property Type").

### **39. Value (Custom Field Value)**

- The corresponding value for the custom field (e.g., "Bedrooms").

### **40. Add Field (+)**

- Click to add a new custom field for related information.

### **41. Add Field (+)**

- Click to add a new custom field for related information.

### **42. Down Arrow**

- Shifts the field down by one row, making it easy to move fields below others.

### **43. Visibility Field Options**

- Manage visibility settings for custom fields.

### **44. Up Arrow**

- Shifts the field up by one row, allowing you to reorder the fields.

### **45. Save**

- After making changes, click the Save button to apply and save any modifications made to the Lots or auction details.

### **46. Back**

- Clicking the Back button will return you to the Auctions screen. If documents or Lots have been added but not saved, you will need to re-upload them when returning.

**Icon**

**Name**

**Description**

Name (Max 100 Characters) \*

Name of the Lot

Enter a name for the lot, limited to 100 characters.

Lot Number \*

Auto Generated...

Lot number

This field is auto-generated and cannot be edited.



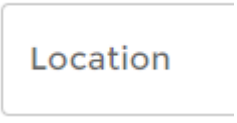

Description \*

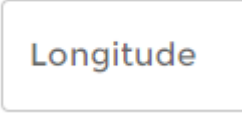
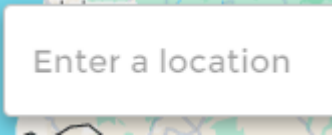


Description


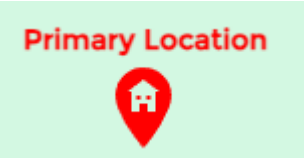


Provide a detailed description of the lot. This field is required.


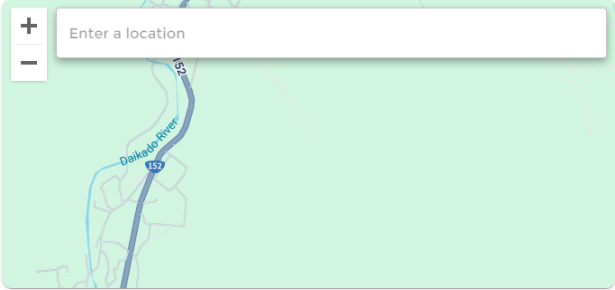
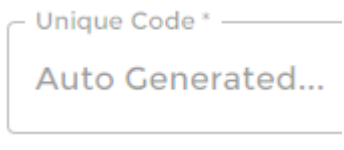
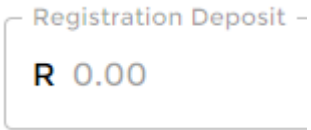
Note: You can enter as much detail as you want in this field.

<div data-bbox="136 240 555 389"> <p>Lot Type * <input type="text"/></p> <p><b>Residential Property</b></p> </div>	<p>Lot Type</p>	<p>Select the type of lot (e.g., Residential Property).</p> <p>Note: This will populate the fields to be complete for the specific property.</p>
<p style="text-align: center;">+</p>	<p>Quick add button - Lot type</p>	<p>Click to quickly add a new lot type.</p>
<div data-bbox="136 788 577 936"> <p>Contact/Agent * <input type="text"/></p> <p><b>Chante Eygelaar</b></p> </div>	<p>Lot Contact/Agent</p>	<p>Select or assign the contact or agent responsible for the lot.</p> <p>Note: The contact persons details will be displayed in the info section associated with the specific Lot and all enquiries.</p>
<p style="text-align: center;">+</p>	<p>Quick add button - Lot Contact/Agent</p>	<p>Click to quickly add a new contact or agent for the lot.</p>





	<p>Toggle - Active</p>	<p>Display the location on the Client Portal (enabled).</p>
	<p>Toggle - Inactive</p>	<p>Do not display the location on the Client Portal (disabled).</p>
	<p>Location</p>	<p>Enter or display the lot's physical address or location.</p>
	<p>Latitude</p>	<p>Enter or display the latitude coordinates for the lot's location.</p>

	Longitude	Enter or display the longitude coordinates for the lot's location.
	Search bar in map	Search for a specific location to display on the map.
	Zoom in, on map	Click to zoom in and see a closer view of the map.
	Zoom out, on map	Click to zoom out and see a wider view of the map.






	<p>Clear location, on map</p>	<p>Remove the currently selected location from the map.</p>
	<p>Primary Location pin</p>	<p>Marks the primary location on the map.</p>
	<p>Use secondary location coordinates button</p>	<p>Use the coordinates entered for the secondary location.</p>
	<p>Clear secondary location button</p>	<p>Clear the coordinates and location for the secondary location.</p>




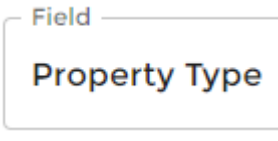
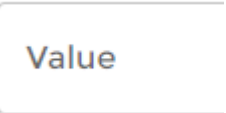


	Secondary location pin	Marks the secondary location on the map.
	Map	Displays the lot's location and related details on a map.
	Unique Code	Automatically generated by our system. Unique code used in identifying Lots.
	Registration deposit	Enter the required registration deposit amount for this lot.
	Buyers Commission	Enter the buyer's commission percentage for this lot.








Buyer's Commission <b>% 0.00</b>		
Opening Bid <b>R 0.00</b>	Opening bid	Set the starting bid price for the lot.
SKU Number	SKU number	The unique Stock Keeping Unit identifier for the lot.
Reserve Price <b>R 0.00</b>	Reserve Price	The minimum price the seller is willing to accept for the lot.
Guide Price <b>R 0.00</b>	Guide price	The suggested price or value of the lot.
Increment Table * <b>Chante</b>	Increment Table	Select an increment table for bid price increases.

	<p>Quick Add button - Increment Table</p>	<p>Quickly add a new increment table.</p>
<p>Increment* — R 0.00</p>	<p>Increment Amount</p>	<p>The fixed increment amount to increase the bid.</p>
<p>Bidding Calculation</p>	<p>Bidding calculation</p>	<p>Select the calculation method for determining bid increments.</p>
	<p>Quick Add button - Bidding calculation</p>	<p>Quickly add a new bidding calculation method.</p>
<p>Show when the Reserve is Met </p>	<p>Show when the reserve is met - Active</p>	<p>Display information when the reserve price has been met (enabled).</p>
<p>Show when the Reserve is Met </p>	<p>Show when the reserve is</p>	<p>Do not display information when the reserve price has been met (disabled).</p>

met - Inactive

<p>Watermark Images </p>	<p>Watermark images - Active</p>	<p>Apply a watermark to images for this lot (enabled).</p>
<p>Watermark Images </p>	<p>Watermark images - Inactive</p>	<p>Do not apply a watermark to images for this lot (disabled).</p>
<p>STC Status </p>	<p>STC Status - Active</p>	<p>The "Subject to Confirmation" (STC) status is currently active.</p>
<p>STC Status </p>	<p>STC Status - Inactive</p>	<p>The "Subject to Confirmation" (STC) status is not active.</p>
<p>Show Paddle Number </p>	<p>Show paddle number - Active</p>	<p>Display the paddle number for bidders (enabled).</p>

<p>Show Paddle Number </p>	<p>Show paddle number - Inactive</p>	<p>Do not display the paddle number for bidders (disabled).</p>
<p>Available </p>	<p>Available - Active</p>	<p>The lot is available for bidding (enabled).</p>
<p>Available </p>	<p>Available - Inactive</p>	<p>The lot is not available for bidding (disabled).</p>
<p>Field </p>	<p>Field</p>	<p>Add or display a custom field for this lot.</p>
<p>Related Information </p>	<p>Related information</p>	<p>Add or display related information about the lot.</p>
<p></p>	<p>Add field</p>	<p>Click to add a new field to the lot information.</p>
<p></p>	<p>Reorder - down</p>	<p>Move the lot 1 line down in the order list.</p>

	Reorder - Up	Move the lot 1 line up in the order list.
	Visibility - Active	The field or item is visible on the client portal (enabled).
	Visibility - Inactive	The field or item is not visible on the client portal (disabled).
	Save	Save all changes made to the lot information.
	Back	Return to the previous screen without saving.
	Add new lot	Click to create a new lot entry.
	Scroll to the top	Quickly navigate to the top of the page.

# Reorder lots screen

The screenshot displays a web interface for reordering auction lots. It features a table with the following structure:

Reordering Lots for Auction Timed Auction			
Unique Code	Name	Current Number	New Number
PP103306	Test 1	1	2
PP103307	Test 2	2	1

The interface is annotated with callouts 1 through 6:

- 1:** Points to the title 'Reordering Lots for Auction Timed Auction'.
- 2:** Points to the 'Unique Code' header.
- 3:** Points to the 'Name' header.
- 4:** Points to the 'Current Number' header.
- 5:** Points to the 'New Number' header.
- 6:** Points to the 'New Number' input field for the second row (PP103307).

The table is divided into two sections:

- Before reordering:** Shows the initial state where PP103306 has Current Number 1 and Name Test 1, and PP103307 has Current Number 2 and Name Test 2.
- After reordering:** Shows the state after reordering. PP103307 now has Current Number 1 and Name Test 2, while PP103306 has Current Number 2 and Name Test 1. The 'New Number' column contains '(Optional)' for both rows.

### Instructions:

1. **Title**
  - The "Reordering Lots for Auction Timed Auction" screen allows you to change the order of lots within the auction. This screen is divided into two sections: *before reordering* and *after reordering* to help you see changes.
2. **Unique Code**
  - Each lot is assigned a unique code, visible in the left-most column, which helps identify the lot you wish to reorder.
3. **Name**
  - The name or description of the lot is shown next to the unique code to help ensure you are reordering the correct lots.
4. **Current Number**
  - This column shows the current order of the lots before you make any changes.
5. **New Number**
  - In this column, you can input a new order for the lots. For example, if you want to move a lot to the second position, type "2" in the new number field.
6. **Optional Reordering**
  - If you leave the "New Number" field empty for any lot, the lot will retain its current position in the order.
7. **After Reordering**
  - Once you input new numbers and save your changes, this section will display how the lots are ordered after the reordering process.

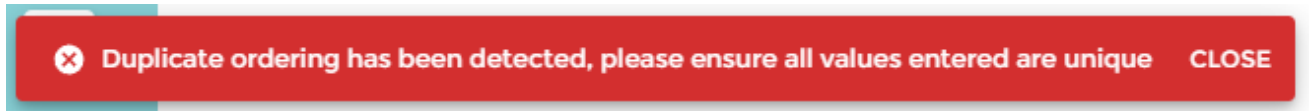
### Steps to Reorder Lots:

- On the "Reordering Lots" screen, identify the lots you wish to reorder by checking their **Unique Code (2)** and **Name (3)**.
- In the **New Number (5)** column, type the position you want each lot to appear in. For example, if you want "Test 2" to appear first, type "1" in the corresponding field.
- If you leave any "New Number" field blank, the lot will retain its current position.
- After inputting the desired new order numbers, make sure to **Save** your changes. If you do not save, the lots will remain in their previous order.
- Once saved, the new order of lots will be displayed under the "After Reordering" section for you to review.

## Error Messages:

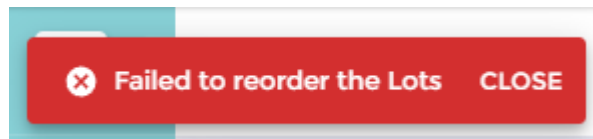
### 1. Duplicate ordering message

- This will display if the user has accidentally added the same number to more than 1 lot.
- This will display on the top left corner of your screen.



### 2. Failed to reorder the lots

- This will display if the user has opened up the reordering list and select save without making any changes.
- This will display on the top left corner of your screen.



<u>Icon</u>	<u>Name</u>	<u>Description</u>
<b>Unique Code</b>	Unique Code	Unique Code generated by our system.
<b>Name</b>	Name	Displays the name given to the lot upon creation.
<b>Current Number</b>	Current Number	The Current Number order of the Lot in the Auction.
<b>New Number</b>  (Optional)	New Number (Optional)	Users can input the desired number representing the lot's new position within the auction.



Save

Select "Save" to confirm the information you've entered for the auction. Note: Your information will not be stored until saved.

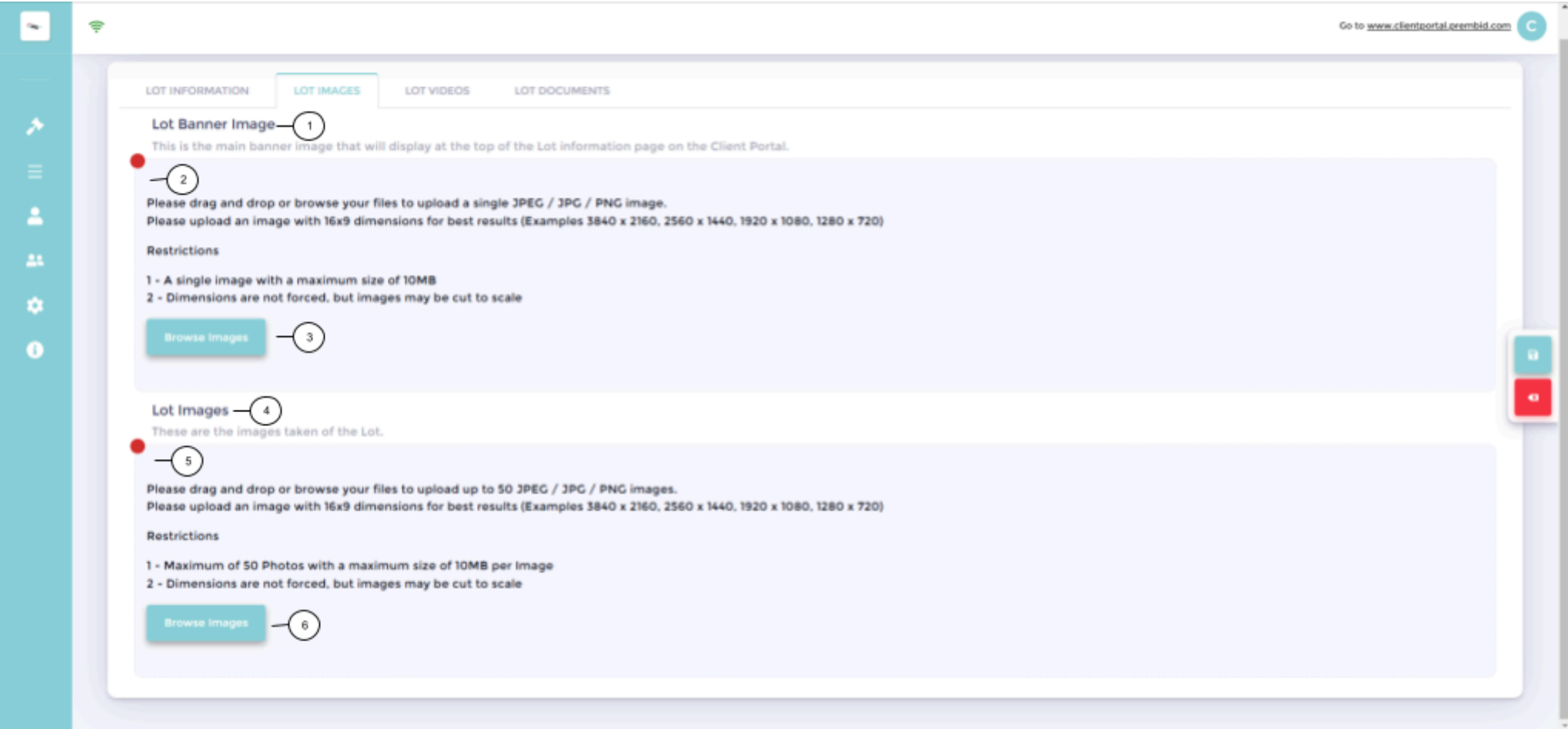


Back

Selecting the "Back" button will redirect you to the "Auctions" screen.

# Adding a Lot image

## Timed, Tender, Streamed



## Instructions:

### **1. Lot Banner Image**

- This is the main image that will display at the top of the Lot screen on the Client Portal as the primary image for this Lot.

### **2. Drag-and-Drop Icon**

- Indicates that images can be dragged and dropped into this area for upload.

### **3. Browse Images Button (Lot Banner Image)**

- Click to browse and select a single image file (JPEG / JPG / PNG) to upload as the Lot Banner Image. Maximum size: 10MB.

### **4. Lot Images**

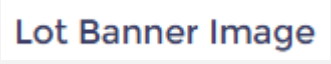



- These are images of the Lot item, showcasing various angles or details for better visualization.

### **5. Drag-and-Drop Icon**

- Indicates that images can be dragged and dropped into this area for upload.

### **6. Browse Images Button (Lot Images)**

- Click to browse and select multiple image files (up to 50) for the Lot. Maximum size: 10MB per image.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Banner Image	This is the main image that will display at the top of the Lot screen on the Client Portal as the primary image for this Lot.
	Lot Image/s	These are images of the Lot item, showcasing various angles or details for better visualization.
	Browse Images	Click to browse and select multiple image files, up to 50 for the Lot, and 1 for the Banner image. Maximum size: 10MB per image.
	Save	Select to save the entered information for the Auction. <i>Note: Information will not be stored until you save.</i> <i>Fields marked with * are mandatory for saving.</i>

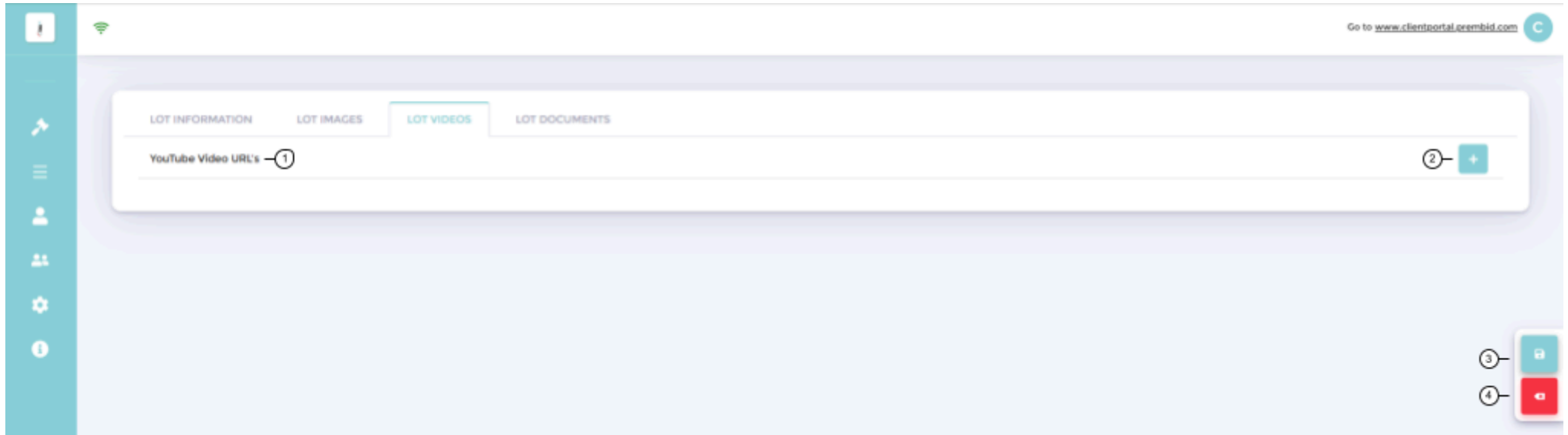


Back

Clicking 'Back' will redirect you to the 'Lots Information' screen without saving any unsaved changes.

## Adding a Lot Video - No video's added

### Timed, Tender, Streamed



Instructions:

**1. YouTube Video URLs**

- Displays the list of YouTube video URLs linked to the lot. This is for viewing purposes only; no direct entry is allowed in this field.

**2. Add YouTube Video URL**

- Click the "+" icon to open a new field where you can enter a YouTube video URL.

**3. Save**

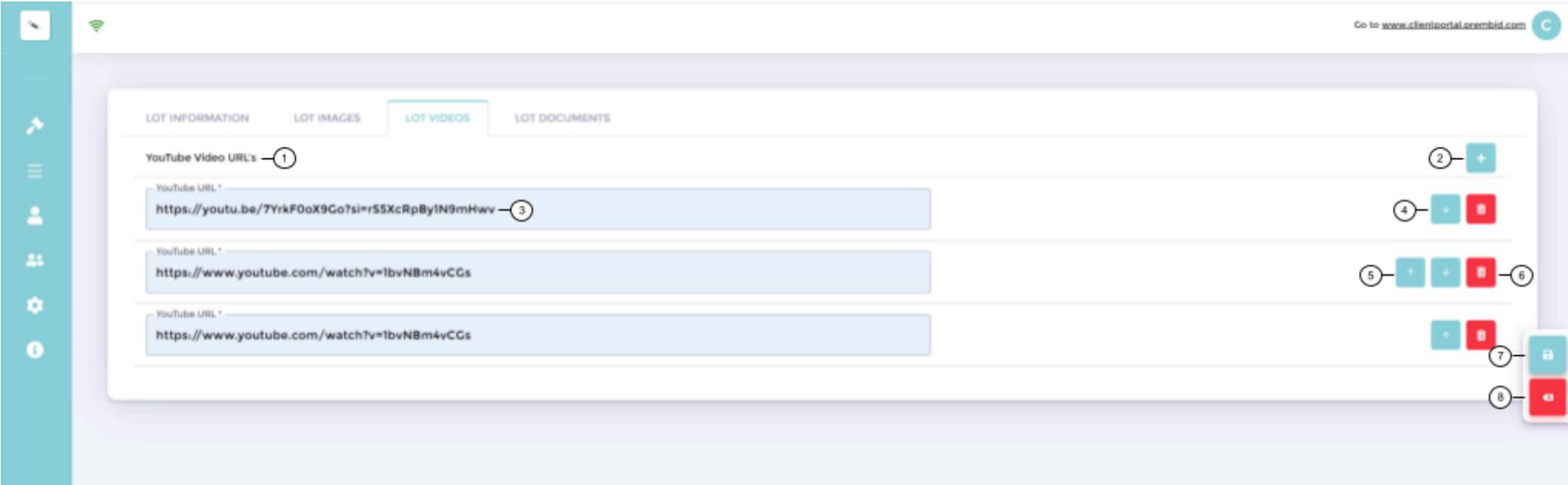
- Click this button to save all entered video URLs and any changes made on the page. Information is not stored until you save.

**4. Back**

- Click this button to return to the previous screen without saving any changes.

# Adding a Lot Video -Video's added

## Timed, Tender, Streamed



## Instructions:

### **1. YouTube Video URLs Display**

- Shows the list of YouTube video URLs added to the lot for easy reference.

### **2. Add YouTube Video URL**

- Click the "+" icon to add a new field where you can enter a YouTube video URL.

### **3. YouTube URL Field**

- Enter the URL of the YouTube video related to the lot in this text field.

### **4. Reorder - Down**

- Moves the video URL entry one position down in the list.

### **5. Reorder - Up**

- Moves the video URL entry one position up in the list.

### **6. Delete YouTube URL**

- Click the trash icon to remove the specific YouTube URL from the list.

### **7. Save**

- Click this button to save all entered or edited video URLs and any changes made on the page.

### **8. Back**

- Click this button to go back to the previous screen without saving any changes.

## Steps to add a lot video

### 1. **Access the Lot Videos Screen**

- Go to the “Lot Videos” tab. This screen displays any videos you wish to showcase for the Lot on the Client Portal.

### 2. **Add a New YouTube Video URL**

- Click the “+” (**Add**) button to create a new entry for a YouTube link. You can add as many links as you need.
- A text field will appear labeled “**YouTube URL**” where you can enter the link.

### 3. **Enter the Video Link**

- Paste the YouTube URL into the text field provided for the video.

### 4. **Organize Video Links** (Optional)

- If you wish to change the order of the videos, use the **Reorder Up** (↑) and **Reorder Down** (↓) icons to move the entries up or down in the list.

### 5. **Delete a Video Link** (Optional)

- To remove a video URL, click the **Delete (Trash)** icon next to the specific URL you want to delete.

### 6. **Save Your Changes**

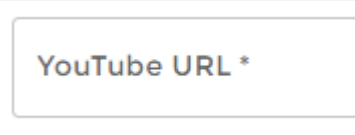




- Once you've added or edited all desired URLs, click the **Save** button to save your changes.
- *Note:* Information is not stored until you have saved. Certain fields (marked with \*) are mandatory to save.

### 7. **Navigate Back**

- To return to the “Lots Information” screen without saving, click the **Back** button.

### 8. **Add Another Lot** (Optional)

- After saving the current lot, you can click **Add** to create a new lot and add more video URLs if needed.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Youtube URL text box	Enter the URL of the YouTube video related to the lot in this text field.
	Add	Click the "+" icon to add a new field where you can enter a YouTube video URL.
	Delete	Click the trash icon to remove the specific YouTube URL from the list.
	Reorder Up	Moves the video URL entry one position up in the list.
	Reorder down	Moves the video URL entry one position down in the list.
	Save	Click this button to save all entered or edited video URLs and any changes made on the page.



Back

Click this button to go back to the previous screen without saving any changes.

## Adding Lot Documents - No documents added

Timed, Tender, Streamed

The screenshot displays a web interface for adding lot documents. At the top left, there is a Wi-Fi icon. At the top right, there is a link to [www.clientportal.prembid.com](http://www.clientportal.prembid.com) and a circular profile icon labeled 'C'. Below the header is a horizontal navigation bar with four tabs: 'AUCTION INFORMATION', 'AUCTION IMAGE', 'AUCTION DOCUMENTS' (which is currently selected and highlighted in light blue), and 'LOTS INFORMATION'. Below the tabs is a large white input field. On the left side of this field, the text 'Document Name' is followed by a circled number '1' pointing to the input area. On the right side of the field, there is a circled number '2' pointing to a blue square button with a white plus sign '+'. In the bottom right corner of the interface, there are two stacked buttons: a teal button with a white padlock icon and a circled number '3' pointing to it, and a red button with a white left-pointing arrow icon and a circled number '4' pointing to it.

## Instructions:

### **1. Document Name**

- When a document is added, its name will be displayed here in the list.

### **2. Add a Document**

- Clicking this button opens a modal where users can select documents that were created in the Documents section.

### **3. Save**

- This button saves any added documents. If changes are not saved and the user navigates to a new section or goes back, the changes will be lost.

### **4. Back**

- This button navigates the user back to the *Auction/Create Auction* screen.

Adding a lot document - modal

## Documents ①

Select documents you want to add

Auction Kishav <span>②</span>	<input checked="" type="checkbox"/> <span>③</span>	<span>⑤</span>
Auction_Access Controlled	<input type="checkbox"/> <span>④</span>	
Auction_Registration Document	<input type="checkbox"/>	
Auction_Acceptance Required	<input type="checkbox"/>	
Auction Kishav 2	<input type="checkbox"/>	
Auction_Upload Required	<input type="checkbox"/>	
Auction doc JPG Reg Wizard	<input type="checkbox"/>	
Auction doc PDF Reg Wizard	<input type="checkbox"/>	
Auction doc PNG Reg Wizard	<input type="checkbox"/>	
Upload Required Apply To Document Type	<input type="checkbox"/>	<span>⑦</span>

⑥

## Instructions:

### **1. Documents Title**

- The title "Documents" is displayed at the top of the modal, indicating that this section is for selecting documents to add to the auction.

### **2. Document List**

- A list of documents with names like "Auction Kishav," "Auction\_Access Controlled," "Auction\_Registration Document," etc., appears here. Each document can be selected for inclusion.

### **3. Toggle Switch**

- Each document has a toggle switch next to it. When toggled to green, the document is selected for addition.

### **4. Toggle Switch**

- Each document has a toggle switch next to it. If it's off (gray), the document is not selected.

### **5. Scroll Bar**

- A scroll bar on the right side allows users to scroll through the list of available documents if there are more than what fits in the view.

### **6. Cancel Button**

- The red "Cancel" button at the bottom of the modal closes the window without saving any changes or selected documents.

### **7. Ok Button**

- The blue "Ok" button saves the selected documents and closes the modal, confirming the user's choices.



## Instructions:

### **1. Document Name Header**

- "Document Name" is displayed as the header for this list, showing the name of each document that has been added to the auction.

### **2. Add Document Button**

- The "+" button allows users to open the document selection modal to add more documents to this list.

### **3. Delete Icon**

- The red trash icon next to each document in the list lets users delete that specific document from the auction.

### **4. Upload Required Indicator**

- This icon indicates that an upload is required for this document and has not yet been completed. It serves as a reminder for the user to upload the necessary file.

### **5. Upload Complete Indicator**






- This icon shows that the required upload has been completed successfully for this document.

### **6. Save All Button**

- A blue "Save" button on the right saves all documents and changes in this section, ensuring that any modifications are stored.

### **7. Cancel Button**

- A red "Cancel" button lets users discard any changes made in this section and return to the previous screen without saving.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Auction document tab	Click on the "Auction Documents" tab to view and manage documents associated with the auction. This section allows you to add, upload, and organize documents that are relevant to the auction, such as terms, requirements, and any additional files for each lot.
	Add Document to Lot	Click on the "+" icon to add a document to the lot. Note: Document types and their associated rules need to be set up in the document templates section of the admin portal.
	Toggle - Active	The toggle switch in the "on" (green) position indicates that the document is active or selected.
	Toggle - Inactive	The toggle switch in the "off" (gray) position indicates that the document is inactive or not selected.
	Okay	Click the "Ok" button to confirm and save the selected documents.



Cancel

Click the "Cancel" button to discard any changes and close the current window or modal.



Upload File

Click the blue "Upload" icon to upload the file you wish to attach to the document added to the Lot.

*Note:* You are selecting the file that you want to display under the document type added to the individual Lot. The system accepts images and PDFs.



Delete

Click the red "Delete" icon to remove the document from the Lot.

*Note:* This action removes the added document type for the Lot.



View/Attached

Click the green "Check" icon to view the file attached to the document type.



Save

Click the blue "Save" icon to save the inserted information for the Lot.

*Note:* Information is not stored until you have saved. Certain fields are mandatory to save.



Back

Click the "Back" icon to navigate to the previous screen or return to the *Auction/Create Auction* page.

*Note:* Unsaved changes will be lost if you navigate back without saving.

## **Steps to Add a Document:**

### **1. Access the Lot Document Screen**

- The “Lot Document” screen displays all documents required for the Lot. This screen will initially be empty for each new Lot added.

### **2. Click the “Add” Button**

- Select the “Add” button to open a modal with a list of available documents that can be added to the auction.

### **3. Select Available Documents**

- In the modal, choose the documents you want to add to the Lot. For details on document templates, refer to the “Document Templates” section on Pg. 84.

### **4. Upload if Required**

- If a document requires an upload, an “Upload” button will appear next to it. Click this button to upload the necessary file. For documents that don’t require an upload, this step can be skipped.

### **5. Document Status Changes to “Attached”**

- Once the document is successfully added, the “Upload” button changes to “Attached.”

### **6. Delete Documents as Needed**

- After adding, documents can be removed by clicking the “Delete” icon next to the document.

### **7. View Uploaded Document**

- Once a document has been uploaded successfully, a green arrow icon will appear. Click this icon to view the uploaded document.

### **8. Save the Auction**

- Click the “Save” button to store the document information for the Lot.
- Unsaved changes will be lost if you navigate away.

### **9. Back Button**

- Clicking the “Back” button will return you to the “Auctions” screen.

### **10. Navigate to Lot Information**

- Click the “+” button to go to the “Lot Information” screen if you need to add additional details about the Lot.

# Auction Management

## Auction Management Screen

### Key Features:

#### 1. Search Functionality:

- Locate a specific auction by typing its name into the search bar.
- Alternatively, select an auction from the **drop-down menu** containing all saved auctions.

#### 2. Auction Selection Options:

- **Search Bar:** Start typing the auction name to see real-time suggestions.
- **Drop-down Menu:** Browse and choose from the full menu of saved auctions.



## Instructions:

### **1. Search Bar:**

- Allows users to type in keywords or auction names to quickly find specific auctions.
- Provides real-time suggestions as the user types to streamline the search process.

### **2. Auction Names Displayed:**




- Lists all saved auctions (Timed and Tender Auctions only) that match the search query or are available by default.
- Each row shows the auction name clearly for easy identification.

### **3. Start Time and Date Column:**

- Displays the scheduled start date and time of each auction in a clear and concise format (YYYY/MM/DD HH:MM).
- Helps users quickly identify the timing of auctions for planning and management.

### **4. Drop-down Menu:**

- Offers an alternative way to select an auction by browsing through a menu of all available options.
- Useful for users who prefer navigating the full menu instead of typing.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
 A search bar with a blue border and the text "Select Auction" in blue. A vertical cursor is positioned at the end of the text.	Search Bar	Allows users to type in keywords or auction names to quickly find specific auctions. Provides real-time suggestions as the user types to streamline the search process.
 A small grey 'X' icon used for clearing the search bar.	Clear search bar	Allows users to clear the search bar in order to select a different auction.
 A small white square icon with a black downward-pointing triangle, representing a dropdown menu.	Dropdown menu	Offers an alternative way to select an auction by browsing through a menu of all available options. Useful for users who prefer navigating the full menu instead of typing.

# Auction - Auction Overview

## Timed

**Auction Management** 1

Select Auction  
Timed 1 Lot 2 3 X 4

**AUCTION OVERVIEW** REGISTERED USERS WISHLIST AUCTION HISTORY INVOICING

5

Current Auction Total 7  
Reserve Met Total 8  
Reserve Not Met Total 9

7.1 R 2,000.00  
8.1 R 0.00  
9.1 R 2,000.00


Number of Lots 10  
Reserve Met Lots 11  
Lots with Bids 12  
Reserve Not Met Lots 13

10.1 1  
11.1 0  
12.1 1  
13.1 1

Open Lots 14  
Extended Lots 15  
Completed Lots 16

6  
14.1 1  
15.1 0  
16.1 0

17 Search... 18 Search Lot Number... 19 Time Remaining 20 21 22

Number 24	Image 25	Name 26	Top Bid/Time Remaining 27	Status 28	Reserve Amount/Met 29	23
1 24.1	 25.1	Test 1 26.1	R 2,000.00 P-59979 (Chante Boop) OD 9H 47M 46S 27.2 27.3 27.4	Open 28.1	R 10,000.00 No 29.2	30

27.5 Actions

Custom Data 32 31

Field 1: Male Field 2: Female Field 3: Size 33

Reorder Lots 34

35 Items per page 100 1-1 of 1 36

## Instructions:

### 1. **Screen Title:**

- Displays the title "*Auction Management*" for easy navigation and identification of the screen.

### 2. **Selected Auction Field:**

- Displays the name of the currently selected auction (e.g., "Timed 1 Lot").

### 3. **Clear Selection Button:**

- Clears the selected auction name.

### 4. **Drop-down Menu (Search):**

- Allows users to select an auction from a list of available options by clicking the drop-down arrow.

### 5. **Tabs Section:**

- Provides navigation between different sections related to the selected auction (e.g., Overview, Registered Users, Wishlist, History, Invoicing).

### 6. **Refresh Button:**

- Updates the displayed information to ensure real-time accuracy.

### 7. **Current Auction Total:**

- Displays the total monetary value of the current auction.
- **7.1:** Current auction total monetary amount.

### 8. **Reserve Met Total:**

- Shows the total monetary value of items that have met their reserve prices.
- **8.1:** Reserve Met Total (total value for items with met reserves).

### 9. **Reserve Not Met Total:**

- Indicates the total monetary value of items that have not yet met their reserve prices.
- **9.1:** Total value for non-met reserve.

### 10. **Number of Lots:**

- Displays the total number of lots available in the auction.
- **10.1:** Total number of lots.

### 11. **Reserve Met Lots Count:**

- Indicates the number of lots where the reserve price has been met.
- **11.1:** Number of Reserve Met Lots.

### 12. **Lots with Bids Count:**

- Shows the number of lots that have active bids.
- **12.1:** Number of Lots with Bids.

**13. Reserve Not Met Lots Count:**

- Reflects the number of lots where the reserve price has not been met.
- **13.1:** Number of Reserve Not Met Lots.

**14. Open Lots Count:**

- Displays the number of lots that are currently open for bidding.
- **14.1:** Number of Open Lots.

**15. Extended Lots Count:**

- Indicates the number of lots that have had their bidding time extended.
- **15.1:** Number of Extended Lots.

**16. Completed Lots Count:**

- Shows the number of lots for which the auction has ended.
- **16.1:** Number of Completed Lots.

**17. Search Bar (General):**

- Allows users to search for specific items or details within the auction.

**18. Search Bar (Lot Number):**

- Allows users to search for a specific lot by its number.

**19. Filter Options:**

- Filters for time remaining, opening bid (low to high, high to low), and ascending/descending order of lots.

**20. Filter Drop-down:**

- Provides options to refine results based on specific criteria.

**21. Refresh Button:**

- Updates the auction data and settings.

**22. Download Auction Catalog (PDF):**

- Allows users to download a full catalog of the auction in PDF format.

**23. Download Auction Overview (CSV):**

- Enables downloading an overview of the auction in CSV format for external analysis.

**24. Lot Number Column:**

- Displays the unique number assigned to each lot.
- **24.1:** Lot number.

**25. Image Column:**

- Shows a thumbnail of the item associated with each lot.
- **25.1:** Lot image.

**26. Lot Name Column:**

- Displays the name or description of the item in the lot.
- **26.1:** Lot name.

### **27. Top Bid and Remaining Time Column:**

- Displays the highest bid amount for the lot and the remaining time before the auction ends.
- **27.1:** Highest bid amount.
- **27.2:** Paddle number.
- **27.3:** Highest bidder name.
- **27.4:** Time remaining.
- **27.5:** Actions modal.

### **28. Status Column:**

- Indicates the current status of the lot (e.g., *Open*, *Closed*, *Awaiting*, *Unavailable*).
- **28.1:** Lot status.

### **29. Reserve Amount/Met Column:**

- Displays the reserve price and whether it has been met.
- **29.1:** Reserve price amount.
- **29.2:** Indicates if the reserve is met (*Yes/No*).

### **30. Actions Drop-down:**

- Opens a drop-down to allow actions related to the auction or lots.
- **30.1:** Dropdown menu for custom data.

### **31. Collapse Custom Data Button:**

- Allows users to collapse or expand custom data fields.

### **32. Custom Data Header:**

- Displays the title or heading for the custom data section.

### **33. Custom Data Fields:**

- Displays any additional data fields or information specific to the auction or lots.

### **34. Reorder Lots Button:**

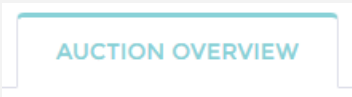

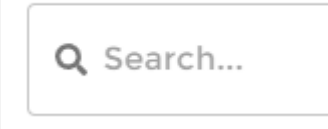
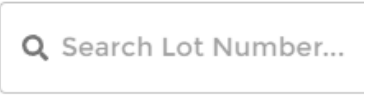
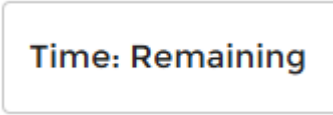
- A feature that lets users reorder the lots. This option only displays when lots are time-remaining.




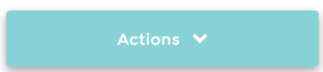
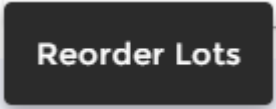
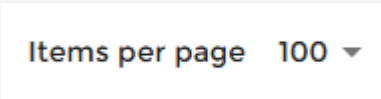
### **35. Items Per Page Drop-down:**

- Adjusts how many lots are displayed per page (e.g., 10, 20, 50).

### **36. Pagination Controls:**

- Allows users to navigate between pages of the auction lots.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Auction Overview Tab	Navigates to the main auction overview page displaying all relevant auction details.
	Refresh	Updates the current page to show the latest auction information.
	Search bar	Allows users to search for auctions by name or keyword.
	Search bar - Lot number	Enables searching for specific lots within an auction by their lot number.
	Filter	Allows users to filter the auction list based on: Time: Remaining – Filters lots based on the remaining time until the auction closes. Number: Ascending – Sorts lots in ascending order based on their lot number. Number: Descending – Sorts lots in descending order based on their lot number. Opening Bid: Low to High – Filters lots by opening bid amount from low to high. Opening Bid: High to Low – Filters lots by opening bid amount from high to low.

	Dropdown menu	Allows users to select different sorting or filtering options.
	Download Auction Catalogue in PDF	Downloads the auction catalogue as a PDF document.
	Download Auction Overview in CSV	Downloads the auction overview in a CSV file format for data analysis.
	Actions Modal	Opens a menu with various actions that can be taken on the selected auction.
	Reorder lots	This button only displays when the filter is set to "Time: Remaining." It functions similarly to a refresh button, allowing users to reorder the lots based on the remaining time. The default filter is "Time: Remaining," ensuring the lots are initially displayed according to the time left for bidding.
	Items per page	This dropdown allows users to select the number of lots displayed per page. Options typically include various preset numbers (e.g., 10, 25, 50, 100), helping users manage the amount of data visible on the screen at once.

1-1 of 1



Number of lots

This field displays the total number of lots available in the auction. It provides users with an overview of the auction's size and the extent of available items.

## Actions Modal

Timed:

**Bids (3)**      **Current Bid**  
R 10,000.00      **Asking Bid**  
R 12,000.00      **Increment**  
Table  
Chante

AMOUNT	PADDLE NUMBER	DATE AND TIME STAMP	ACTIONS
R 10,000.00	CHANTE BOOP P-01685	2024/12/31 07:47:09	 
R 4,000.00	CHANTE 1 EYGELAAR P-77339	2024/12/31 07:46:26	
R 2,000.00	CHANTE BOOP	2024/12/12 08:03:27	

**You**      **P-77339**

R 12,000.00

Custom Bid: R 0.00      Maximum Bid: R 12,000.00

Submit      Submit

Extend (Add 2 Minutes)

Change Increment: R 0.00      Change Late Bid Ext: 0H 1M 0S

Change Opening Bid: R 0.00      Change Reserve Price: R 10,000.00


Actions Modal Timed Part 1:





**Bids (3)** 1

**Current Bid** 2  
R 10,000.00

**Asking Bid** 3  
R 12,000.00

**Increment Table** 4  
Chante

 5

AMOUNT	PADDLE NUMBER	DATE AND TIME STAMP	ACTIONS
R 10,000.00	CHANTE BOOP P-01685 <span>6</span> 	2024/12/31 07:47:09	 
R 4,000.00	CHANTE 1 EYGELAAR P-77339 <span>7</span> 	2024/12/31 07:46:26	<span>9</span> <span>10</span>
R 2,000.00	CHANTE BOOP <span>8</span>	2024/12/12 08:03:27	

## Instructions:

1. **Bids (3):**
  - Shows the total number of bids placed on the item.
2. **Current Bid:**
  - Displays the current highest bid amount.
3. **Asking Bid:**
  - Indicates the next asking bid amount, which is higher than the current bid.
4. **Increment Table:**
  - Displays the manual increment table used for the auction to show the increment steps.
5. **Lock Bidding Icon:**
  - Locks the bidding process, preventing further bids from being placed.
6. **Coin Icon:**
  - Indicates that the client user has placed a max bid.
7. **Admin User Icon:**
  - Indicates that the admin user has placed a max bid or bid.
8. **No Icon:**
  - Indicates that the client user has placed a quick bid or a custom bid.
9. **Edit Bid:**
  - Allows editing the bid details.
10. **Delete Bid:**
  - Allows deleting the bid from the list.

Actions Modal Timed Part 2

**You** **1** **P-77339**

**R 12,000.00** **2**

Custom Bid **R 0.00** **3** Maximum Bid **R 12,000.00** **4**

**Submit** **5** **Submit** **6**

Instructions:

1. **Paddle Number (P-77339):**
  - Displays the admin user's paddle number.
2. **Current Bid Amount:**
  - Shows the current bid amount placed by the admin user.
3. **Custom Bid Field:**
  - Allows the admin user to enter a custom bid amount.
4. **Maximum Bid Field:**
  - Displays the maximum bid amount that the admin user is willing to place.
5. **Submit Button (Custom Bid):**
  - Submits the custom bid amount entered by the admin user.
6. **Submit Button (Maximum Bid):**
  - Submits the maximum bid amount entered by the admin user.

Actions Modal Timed Part 3:

The image shows a screenshot of an 'Actions Modal' interface. On the left is a large modal box containing several action buttons and input fields, each with a numbered callout (1-9). On the right is a separate section with time input fields for Hours, Minutes, and Seconds, and a large teal button at the bottom with callout 5.4. A vertical line with callout 5.3 connects the Hours field to the Minutes field.

**Modal Actions:**

- 1: Extend (Add 2 Minutes)
- 2: Change Increment (R 0.00)
- 3: Change Late Bid Ext (0H 1M 0S)
- 4: [Lock icon]
- 5: [Plus icon]
- 6: Change Opening Bid (R 0.00)
- 7: Change Reserve Price (R 10,000.00)
- 8: [Lock icon]
- 9: [Lock icon]

**Time Input Fields:**




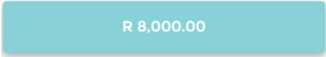
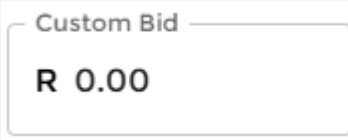
- Hours: 0 (5.1) [5.2] [5.3] +
- Minutes: 0 +
- Seconds: 0 +

**Bottom Button:**


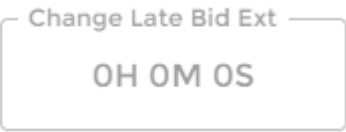
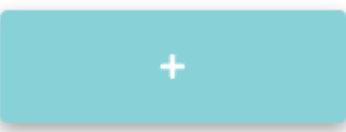

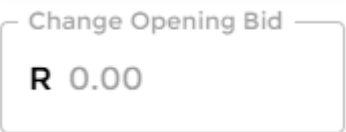

- 5.4: [Lock icon]

## Instructions:

1. **Extend (Add 2 Minutes):**
  - Adds 2 minutes to the auction lot's current time.
2. **Change Increment:**
  - Allows the admin to change the bid increment amount.
3. **Change Late Bid Extension:**
  - Displays the current late bid extension time.
4. **Save Increment Changes:**
  - Saves the changes made to the bid increment amount.
5. **Plus Button:** Clicking this will open the modal on the right.
  - 5.1 **Time Fields (Hours/Minutes/Seconds):**
    - Displays the amount of time (hours, minutes, seconds) by which the lot needs to be extended.
  - 5.2 **Arrow Controls:**
    - Allows users to increase or decrease the time using the up/down arrows.
  - 5.3 **Plus Icon:**
    - Users can use the + icon to add time.
  - 5.4 **Submit Time Extension:**
    - Confirms and submits the selected time extension for the lot.
6. **Change Opening Bid:**
  - Allows the admin to change the opening bid amount if no bids have been placed. If the field is greyed out, it indicates that bids have already been placed and the opening bid cannot be changed.
7. **Change Reserve Price:**
  - Enables the admin to change the reserve price of the lot.
8. **Save Opening Bid Changes:**
  - Saves the changes made to the opening bid amount.
9. **Save Reserve Price Changes:**
  - Saves the changes made to the reserve price of the lot.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Lock Auction	Locks the auction to prevent further bidding or changes.
	Edit Bid	Allows administrators to edit the details of a specific bid.
	Delete bid	Deletes a bid from the auction.
	Quick bid button - Admin user	Enables admin users to quickly place a bid at the current bid increment.
	Custom bid	Provides a field for entering a custom bid amount.

<input type="text" value="Maximum Bid"/> <input type="text" value="R 0.00"/>	Max bid	Allows the user to set the maximum bid they are willing to place on a lot. The system will automatically increase bids up to this amount if needed.
<input type="button" value="Submit"/>	Submit - Custom bid/Max bid	Submits the entered custom bid or the set maximum bid for the lot.
<input type="button" value="Confirm"/>	Confirm - Quick bid/ Custom bid/Max bid	Confirms the quick bid, custom bid, or max bid before it is placed.
<input type="button" value="X"/>	Cancel - Quick bid/ Custom bid/Max bid	Cancels the quick bid, custom bid, or max bid action before it is finalized.
<input type="button" value="Extend (Add 2 Minutes)"/>	Add 2 min to lot	Extends the auction duration for the selected lot by 2 minutes.
<input type="text" value="Change Increment"/> <input type="text" value="R 0.00"/>	Change Increment amount	Allows the user to adjust the bidding increment for the selected lot.

	Save changes	Saves any modifications made to the auction or lot details.
	Late bid extension time display	Shows the current time extension applied to a lot due to a late bid.
	Change late bid extension	Modifies the duration of the time extension applied to a lot when a late bid is placed.
	Add time to lot extension	Adds additional time to the current extension period for a lot.
	Change opening bid	Allows the user to modify the initial opening bid amount for the selected lot.
	Change reserve price	Enables the user to adjust the reserve price for the selected lot.

## Registered Users Tab Part 1:

Timed

Tender

Auction Management

Select Auction  
Timed

1

AUCTION OVERVIEW REGISTERED USERS WISHLIST AUCTION HISTORY INVOICING

9 11

Q Search... 2

Name 3	Paddle Number 4	Type 5	Status 6	Compliance Status 7	Reason 8	10	12
D X (Chante Default )	P-30350	Company Profile	Declined 2025/01/08 10:21	7.1 -	8.1 Invalid user	Approval	
Owl Monkey (Company 1)	P-04097	Company Profile	Approved 2025/01/08 10:20	Missing Documents	7.2	Approval	
Noah Sebastian (Bad Omens)	P-64572	Company Profile	Not Registered 2025/01/08 10:21	-	Black listed		13
Chante Boop	P-41209	Individual Profile	Approved 2025/01/08 10:19	Documents Uploaded	7.3	Approval	

Items per page 10 1-4 of 4

14 15

## Instructions:

### 1. **Registered Users Tab:**

- The tab where all registered users for the selected auction are displayed.

### 2. **Search Bar:**

- Allows the admin to search through registered users by name, paddle number, or other relevant details.

### 3. **Name:**

- Displays the name of the registered user.

### 4. **Paddle Number:**

- Shows the paddle number assigned to the registered user.

### 5. **Type:**

- Indicates the type of profile (e.g., Company Profile, Individual Profile).

### 6. **Status:**

- Shows the current registration status of the user (e.g., Approved, Declined, Not Registered, Awaiting).

### 7. **Compliance Status:**

- Displays the status of the compliance documents.

7.1 **Dash:** Indicates that no compliance status will display due to the declined status, or that the compliance status has been cleared and all is in order, no need for further action.

7.2 **Bell Icon:** Indicates that the client user has not uploaded all required documents. Admin can click the bell to send a reminder.

7.3 **Compliance Completed Icon:** Indicates compliance is completed. Admin can click the icon to clear the compliance status.

### 8. **Reason:**

- Provides the reason for the current status (e.g., Missing Documents, Blacklisted, Invalid User). Only applicable to not registered and declined users.

### 9. **Refresh Icon:**

- Refreshes the list of registered users.

### 10. **Manually Add User:**

- Button to manually add a client user profile to the registered users for the auction.

### 11. **Download PDF:**

- Downloads a PDF file of all registered users and their related information.

### 12. **Filter Icon:**

- Opens the filter options to refine the list of registered users.

**13. Dropdown Arrow:**

- Opens the document section and profile information for the user.

**14. Items Per Page:**

- Displays the number of registered users shown per page.

**15. Total Amount of Registered Users:**

- Shows the total number of registered users.

Registered Users Tab Part 2 - Profile dropdown:

Company Profile with a declined status but all documents have been added

The screenshot displays a user profile interface with the following sections and annotations:


- User Profile Summary:**
  - Name:** D X (Chante Default)
  - Paddle Number:** P-30350
  - Type:** Company Profile
  - Status:** Declined (2025/01/08 10:21) - **1**
  - Compliance Status:** -
  - Reason:** Invalid user - **2**
  - Action:** Approval button
- Company Information:**
  - Company:** - **3**
  - Details:** Company Name: Chante Default, Trading Name: D, Registration Number: Xxx, VAT Number: X, Contact First Name: D, Contact Last Name: X, Contact Email: chante\_alias\_android4777\_test@randrtechsa.co.za, Contact Phone Number: 8
- Documents Section:**
  - Documents:** - **4**
  - Show History:** - **5**
  - Refresh/Action:** - **6**
  - Dropdown:** - **7**
- Documents Table:**

NAME	TYPE	STATUS	NOTES	ACTIONS
Auction Kishav	Auction Uploaded Document - <b>8</b>	Document Uploaded (2025/01/08 10:20)	-	- <b>10</b>
Auction Kishav 2	Auction Uploaded Document	Document Uploaded (2025/01/08 10:20)	-	-
Profile Kishav	Company Profile Document - <b>9</b>	Document Uploaded (2025/01/08 10:20)	-	-
Profile .jpg Upload required	Company Profile Document	Document Uploaded (2025/01/08 10:20)	-	-
- Vertical Scrollbar:** - **11**



## Instructions:







1. **Status:**
  - Displays the current registration status of the user (e.g., Declined).
2. **Dropdown Arrow:**
  - Allows the admin to expand or collapse the company and document information sections.
3. **Expand Company Dropdown:**
  - Expands to show more detailed company information, such as company name, trading name, registration number, VAT number, contact first and last name, contact email, and phone number.
4. **Expand Document Dropdown:**
  - Expands to show more details about the uploaded documents.
5. **Show History Toggle:**
  - Allows the admin to toggle and view the history of actions taken related to the user's documents.
6. **Refresh:**
  - Refreshes the document section to reflect the latest updates.
7. **Request More Documents:**
  - Button to request additional documents from the user.
8. **Auction Uploaded Documents:**
  - Documents that the user uploaded during registration.
9. **Company Profile Documents:**
  - Documents that were uploaded when the company profile was created.
10. **View Documents:**
  - Allows the admin to view the uploaded documents.
11. **Invalidate Documents:**
  - Button to invalidate the documents uploaded by the user.

Company profile with approved status but not all documents have been added:

Owl Monkey (Company 1) P-04097 Company Profile Approved 2025/01/08 10:20 **1** Missing Documents  **2** Approval

Company

Documents Show History    **5**

NAME	TYPE	STATUS	NOTES	ACTIONS
Auction Kishav	Auction Uploaded Document <b>6</b>	<span>Awaiting Upload</span> 2025/01/08 10:20 <b>8</b>		
Auction Kishav 2	Auction Uploaded Document	<span>Awaiting Upload</span> 2025/01/08 10:20		
Profile Kishav	Company Profile Document <b>7</b>	<span>Document Uploaded</span> 2025/01/08 10:20		  <b>9</b>   <b>10</b>
Profile jpg Upload required	Company Profile Document	<span>Document Uploaded</span> 2025/01/08 10:20		 

## Instructions:

1. **Status:**
  - Displays the registration status of the company profile, which is "Approved."
2. **Bell Icon:**
  - Indicates missing documents. The admin user can click the bell icon to send a reminder to the client user to upload the missing documents.
3. **Show History Toggle:**
  - Allows the admin to view the document upload history.
4. **Refresh:**
  - Refreshes the document section to show the most up-to-date information.
5. **Request More Documents:**
  - Admin can click this to request additional documents from the user.
6. **Auction Uploaded Document:**
  - These are the documents that the user is required to upload for auction registration.
7. **Company Profile Document:**
  - These are documents uploaded when creating the company profile.
8. **Awaiting Upload Status:**
  - Indicates that the document is still pending upload from the user.
9. **View Document Icon:**
  - Allows the admin to view the uploaded document.
10. **Invalidate Document Icon:**
  - Allows the admin to mark a document as invalid if it does not meet the requirements.

Company profile with a not registered status but all documents have been added before user was marked as “not registered”  
Show History toggle on VS off.

Noah Sebastian (Bad Omens) P-64572 Company Profile **Not Registered** 2025/01/08 10:21 1 - Black listed

Company

Documents

2 Show History

NAME	TYPE	STATUS	NOTES	ACTIONS
Auction Kishav	Auction Uploaded Document 3	Document Invalidated 2025/01/08 10:21	Registration was reset 2025/01/08 10:21	4
Auction Kishav 2	Auction Uploaded Document	Document Invalidated 2025/01/08 10:21	Registration was reset 2025/01/08 10:21	

Documents

5 Show History

NAME	TYPE	STATUS	NOTES	ACTIONS
6				

## Instructions:

### 1. **Status:**

- Displays the registration status of the company profile, which is "Not Registered."

### 2. **Show History Toggle (On):**

- When enabled, this toggle shows the history of actions taken on the documents.

### 3. **Document Invalidation:**

- Shows that the document has been invalidated, with a note stating that the registration was reset.

### 4. **View Document Icon:**


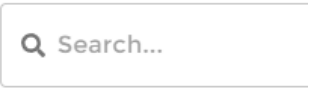



- Allows the admin to view the document.






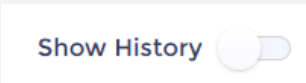
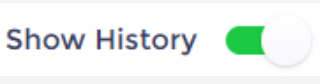
### 5. **Show History Toggle (Off):**

- When disabled, this toggle hides the history of actions on the documents.

### 6. **Document List:**

- Displays the list of documents without showing their history since the toggle is off.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
 A rectangular button with a light blue border and the text "REGISTERED USERS" in blue capital letters.	Registered users tab	Navigates to the registered users page displaying all relevant client details.
 A search input field with a magnifying glass icon on the left and the placeholder text "Search...".	Search bar	Allows users to search for registered users by name, email, or phone number to quickly locate specific individuals within the list.
 A circular icon containing a refresh symbol (a circular arrow).	Refresh	Updates the list of registered users to reflect the most current information, ensuring that any recent changes or additions are displayed.
 A circular icon containing a person silhouette with a plus sign next to it.	Manually add a registered user	Provides the option to manually add a new registered user to the system, allowing admins to input user details directly.
 A circular icon containing a document symbol with a download arrow pointing to it.	Download registered users info in CSV format	Enables downloading the registered users' information in a CSV file, which can be used for record-keeping or further analysis.

	Filter	Offers various filtering options to narrow down the list of registered users based on specific criteria, such as compliance status or registration progress.
	Compliance status has been cleared	Dash: Indicates that no compliance status will display due to the declined status, or that the compliance status has been cleared and all is in order, no need for further action.
	Notify user of missing documents/ Reminder	Sends a notification or reminder to users to submit any missing documents needed for compliance verification.
	Clear compliance status	Clears the compliance status and helps the admin user to identify that no further action has to be taken and all is in order for that specific client.
	Dropdown menu	Provides additional options or actions related to managing registered users, such as viewing history or requesting documents.
 	Show history toggle, on and off	Allows toggling between showing or hiding the history of actions taken on a user's account, including past document submissions and compliance checks.



Request additional documents

Enables sending a request to users for additional documents required for their registration or compliance.



View documents

Allows admins to view the documents submitted by users, ensuring they meet the necessary requirements.



Invalidate documents

Marks submitted documents as invalid, prompting the user to resubmit the correct or updated documents.

Approval

- Approved
- Declined
- Not Registered

Approval button

Select Appropriate Status (Approved, Declined, Not Registered):  
Allows selecting the status of a user's registration. "Approved" marks the user as compliant, "Declined" rejects the registration, and "Not Registered" reopens the registration process for the user.

Items per page 10 ▾

Items per page

This dropdown allows users to select the number of lots displayed per page. Options typically include various preset numbers (e.g., 10, 25, 50, 100), helping users manage the amount of data visible on the screen at once.

1-5 of 5

Total number of  
registered users

This field displays the total number of registered users for the auction. It provides users with an overview of the auction's size and the extent of users interested in the auction.

## Manually Register User to bid

Manually Register User To Bid on Timed

Q Search... 1

Email 2	Phone Number 3
BELLA@GMAIL.COM	0725896321
BFFHDXG@HMAIL.COM	0721452236
BLOOPERS@PROPERTY.CO.ZA	0839434943
CAMERON.V@RANDRTECHSA.COM	0824554582
CHANTE1_ALIAS_TEST@RANDRTECHSA.CO.ZA	055568885

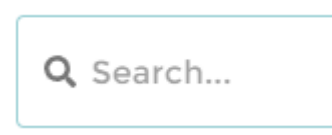

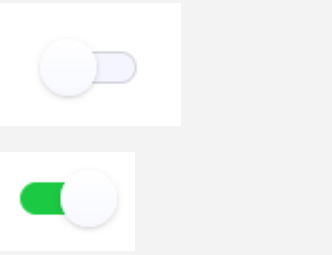
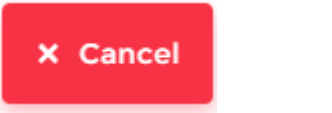
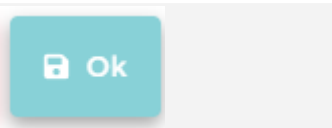
Bidding Profiles 5 4

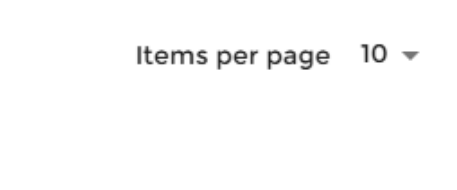
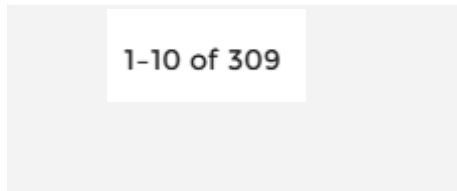

Name	Email	Profile Type 6	7
Delores Pinefield	chante1_alias_test@randrtechsa.co.za	Individual	<input type="checkbox"/>

8 X Cancel Ok

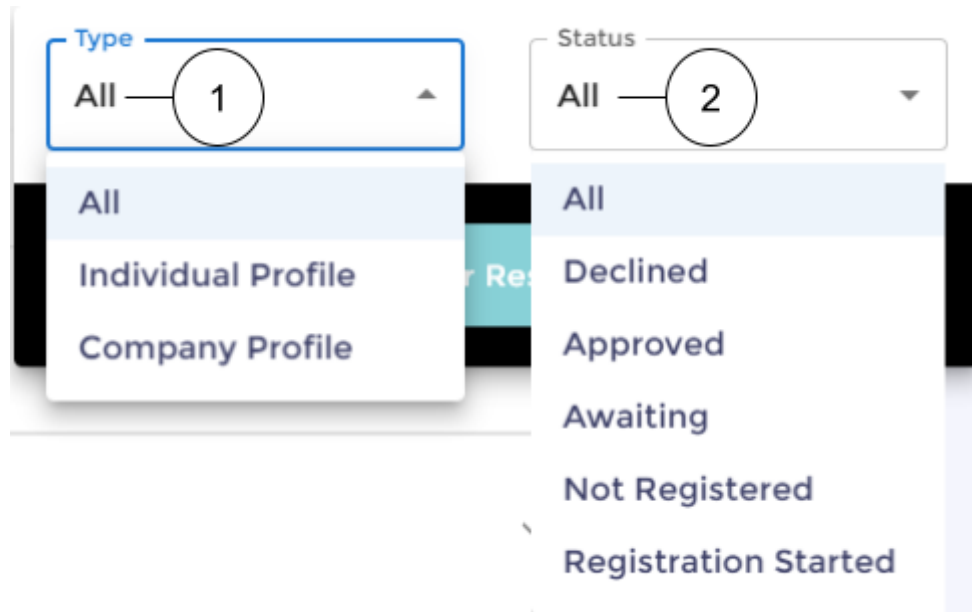
## Instructions:

1. **Search Bar:**
  - Allows the admin to search for a specific user by entering keywords related to their email or phone number.
2. **Email Column:**
  - Displays the email addresses of users.
3. **Phone Number Column:**
  - Displays the phone numbers associated with the users' accounts.
4. **Expand/Collapse Icon:**
  - Allows the admin to expand or collapse the bidding profiles section for more or fewer details.
5. **Bidding Profiles Section:**
  - Shows the list of bidding profiles available for the selected user.
6. **Profile Type Column:**
  - Displays the type of profile (e.g., Individual, Company).
7. **Toggle Button:**
  - Enables or disables the selection of a bidding profile for registration.
8. **Cancel Button:**
  - Cancels the registration process and closes the form.
9. **OK Button:**
  - Confirms the registration process and submits the selected information.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search bar	Allows the admin to search for specific users by name, phone number, or other criteria.
	Dropdown menu	Opens up the bidding profiles registered under the client account.
	Add user toggle on and off	Switches the manual user addition feature on or off.
	Cancel	Cancels the current operation or input.
	Ok	Confirms and saves the current operation or input.

	Items per page	This dropdown allows users to select the number of lots displayed per page. Options typically include various preset numbers (e.g., 10, 25, 50, 100), helping users manage the amount of data visible on the screen at once.
	Total number of profiles loaded on the admin site.	Shows the total count of user profiles currently loaded and visible on the admin interface.
	Pagination	Navigates through multiple pages of registered users.

Filter



## Instructions:

### 1. **Type Filter:**

- Provides options to filter users by the type of account.
- **Options:**
  - **All:** Displays all user types.
  - **Individual:** Displays users with individual accounts.
  - **Company:** Displays users with company accounts.

### 2. **Status Filter:**

- Allows filtering users based on their registration status.
- **Options:**
  - **All:** Shows users of all registration statuses.
  - **Declined:** Displays users whose registration has been declined.
  - **Approved:** Shows users with approved registrations.
  - **Not Registered:** Lists users whose registration was reset.
  - **Registration Started:** Displays users who have started the registration process but have not completed it.

# Wishlist Tab:


## Timed

**Auction Management**

Select Auction  
Timed 1 x

AUCTION OVERVIEW REGISTERED USERS **WISHLIST** AUCTION HISTORY INVOICING

Q Search... 2 8 ↻

Number <span>3</span>	Image <span>4</span>	Name <span>5</span>	SKU Number <span>6</span>	Sold <span>7</span>	<span>9</span> <span>^</span>
1		Timed 1 Lot		<span>no</span>	

Profiles 11 10 ^

Q Search... 12 17 ↻


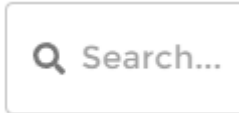


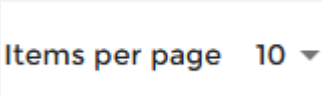
Name <span>13</span>	Contact <span>14</span>	Type <span>15</span>	Wishlist Date <span>16</span>	<span>18</span>	<span>19</span>
Chante Boop	chante_alias_android4777_test@randrtechsa.co.za	IndividualProfile	2025/01/09 08:25		
Noah Sebastian	chante_alias_android4777_test@randrtechsa.co.za	CompanyProfile	2025/01/09 08:25		

Items per page 10 18 19 1-2 of 2

Items per page 10 20 21 1-1 of 1

## Instructions:

1. **Wishlist Tab:**
  - A tab that displays all the items added to the wishlist for the selected auction.
2. **Search Bar:**
  - A field to search for items within the wishlist by number, name, or SKU.
3. **Number:**
  - The unique identifier or number assigned to each wishlist item.
4. **Image:**
  - A thumbnail image of the wishlist item.
5. **Name:**
  - The name or title of the wishlist item.
6. **SKU Number:**
  - The stock-keeping unit (SKU) number associated with the wishlist item.
7. **Sold:**
  - Indicates whether the wishlist item has been sold or not.
8. **Refresh:**
  - A button to refresh the wishlist data to ensure it is up to date.
9. **Expand/Collapse:**
  - An arrow button to expand or collapse the profiles tab of the users who have wishlisted items.
10. **Profiles Section:**
  - A section that lists profiles associated with the wishlist item.
11. **Profiles:**
  - The label for the section containing user profiles related to the wishlist.
12. **Search Bar:**
  - A field to search for user profiles by name or contact information.
13. **Name:**
  - The name of the user who has the item in their wishlist.
14. **Contact:**
  - The contact information (email) of the user who has the item in their wishlist.
15. **Type:**
  - The type of profile (e.g., IndividualProfile or CompanyProfile).
16. **Wishlist Date:**
  - The date and time when the item was added to the wishlist.
17. **Refresh:**
  - A button to refresh the profile's data to ensure it is current.
18. **Items per Page:**
  - A dropdown to select the number of items displayed per page in the profiles section. - Applies to the profiles' section.
19. **Pagination:**
  - Controls to navigate through different pages of profiles if there are multiple pages.- Applies to the profiles' section.
20. **Items per Page:**
  - A dropdown to select the number of items displayed per page in the wishlist. - Applies to the wishlisted items.
21. **Pagination:**
  - Controls to navigate through different pages of the wishlist if there are multiple pages. - Applies to the wishlisted items.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Wishlist Tab	A tab that displays all the items added to the wishlist for the selected auction.
	Search bar	A field to search for items within the wishlist by number, name, SKU or user profiles by name or contact information.
	Refresh	A button to refresh the wishlist data to ensure it is up to date. A button to refresh the profile's data to ensure it is current.
	Dropdown menu	Expand/Collapse: An arrow button to expand or collapse the profiles tab of the users who have wishlisted items.
	Items per page	A dropdown to select the number of items displayed per page in the profiles section.

---

1-1 of 1

Total number of  
wishlisted items

Controls to navigate through different pages of the wishlist if there are multiple  
pages

Auction History Tab Part 1:

Auction Management

Select Auction  
Admin Documents

AUCTION OVERVIEW REGISTERED USERS WISHLIST **AUCTION HISTORY** INVOICING

Search...

Mark Non-STC Lots Meeting Reserve As Sold

Number	Image	Top Bidder Name	Top Bidder Contact	Top Bid	Paddle Number	SKU Number	Reserve	Reserve Met	
1		Chante Eyelaar	chante@randrtechsa.co.za	R 2,000.00	F-65873		R 0.00	Yes	Mark As Unsold
2		Chante Eyelaar	chante@randrtechsa.co.za	R 2,000.00	F-65873		R 0.00	Yes	Mark As Sold

Items per page 10 1-2 of 2

## Instructions:

### 1. **Auction History Tab**

- Displays a historical record of all auctioned lots, including top bidders, bid amounts, and lot statuses.

### 2. **Search Bar**

- Enables admins to search for specific lots or bidders within the auction history.

### 3. **Lot Number**

- Displays the unique number assigned to the auctioned lot.

### 4. **Lot Image**

- A thumbnail preview of the auction item.

### 5. **Top Bidder Name**

- Shows the name of the highest bidder for the lot.

### 6. **Top Bidder Contact**

- Displays the email or contact information of the highest bidder.

### 7. **Top Bid Amount**

- The highest bid placed on the lot.

### 8. **Paddle Number**

- The unique bidder paddle number assigned to the highest bidder.

### 9. **SKU Number**

- The stock-keeping unit (SKU) associated with the lot for tracking.

### 10. **Reserve Amount**

- The minimum price required for the lot to be sold.

### 11. **Reserve Met Indicator**

- Displays whether the reserve price has been met (Yes/No).

### 12. **Mark Non-STC Lots Meeting Reserve as Sold**

- A bulk action button to mark all non-STC (Subject to Confirmation) lots with met reserves as sold.

### 13. **Refresh Button**

- Reloads the auction history data to display the latest updates, including new bids or status changes.

### 14. **Download PDF**

- Downloads the post-auction information in PDF format.

### 15. **Download CSV**

- Downloads the post-auction information in CSV format.

#### **16. Mark as Unsold Button**

- Allows an admin to manually mark a lot as unsold if it was not successfully sold in the auction.

#### **17. Mark as Sold Button**

- Allows an admin to manually mark a lot as sold, typically used for confirmed sales after the auction ends.

#### **18. Dropdown Action Menu for Each Lot**

- Provides additional information on the lots, such as top bidder details and bidding history.

#### **19. Dropdown Action Menu for Each Lot**

- Provides additional information on the lots, such as top bidder details and bidding history.


#### **20. Items Per Page Selector**

- Allows the admin to adjust the number of lots displayed per page.

#### **21. Pagination Info**

- Displays the current range of items shown and the total number of lots in the auction history.

Dropdown menu 18 and 19 - See above descriptions

2  Tarien Eygelaar CHANTE\_ALIAS\_TEST@RANDRTECHSA.CO.ZA R 4,000.00 P-23526 R 0.00 Yes Mark As Sold 1

Top Bidder: Company 3

Company Name: PremBid Trading Name: Registration Number: VAT Number: Contact First Name: Tarien Contact Last Name: Eygelaar Contact Email: CHANTE\_ALIAS\_TEST@RANDRTECHSA.CO.ZA 2  
Contact Phone Number: support@randrtechsa.com

History 5 4

6 7

NAME	CONTACT	PADDLE NUMBER	DATE	TIME STAMP	AMOUNT	ACTIONS
Tarien Eygelaar	CHANTE_ALIAS_TEST@RANDRTECHSA.CO.ZA	P-23526	2025-03-04	10:08:07	R 4,000.00	
Chante Eygelaar	chante@randrtechsa.co.za	P-65873	2025-03-04	09:42:57	R 2,000.00	<span>8</span>

## Instructions:

### 1. **Collapse All Dropdowns under Lot 2**

- Closes all expanded sections related to this lot, including bidder details and bidding history.

### 2. **Collapse Top Bidder Info**

- Closes the section displaying the top bidder's company details and contact information.

### 3. **Top Bidder Tab**

- Displays information about the top bidder, including company name, trading name, registration number, VAT number, and contact details.

### 4. **Collapse History Tab**

- Closes the bidding history section for this lot.

### 5. **History Tab**

- Shows the detailed bid history for the lot, including bidder names, contact details, paddle numbers, bid amounts, and timestamps.

### 6. **Download PDF**

- Downloads the bidding history in PDF format for record-keeping or reporting purposes.

### 7. **Download CSV**

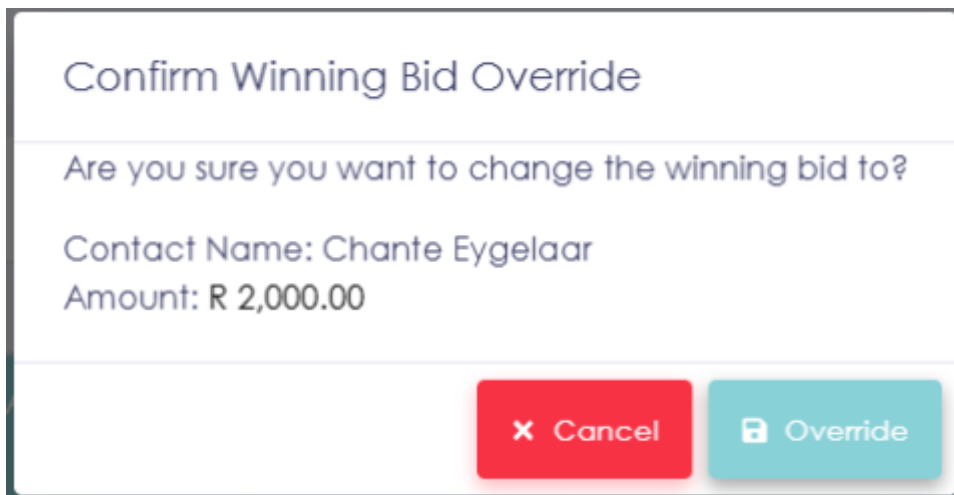
- Downloads the bidding history in CSV format for easy data analysis.

### 8. **Mark This Bid as the Winning Bid Icon**

- Allows the admin to manually mark a specific bid as the winning bid for the lot.

### Mark This Bid as the Winning Bid Icon Modal

- **Purpose:** This modal appears when an admin selects a bid to override the current winning bid and mark a different bid as the winner.
- **Actions:**
  - **Cancel:** Closes the modal without making any changes.
  - **Override:** Confirms the action and sets the selected bid as the winning bid for the lot.



Mark as sold Modal:

### Confirm Mark As Sold

An invoice will be generated once this Lot has been marked as sold. Are you sure you want to continue?

Lot Number: 1  
Lot SKU Number:  
Lot Unique Code: PP106703

Amount

Mark as Unsold Modal:

### Confirm Mark As Unsold

Are you sure you want to mark this Lot as unsold?

Lot Number: 1  
Lot SKU Number:  
Lot Unique Code: PP106703


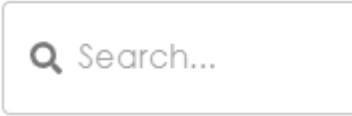
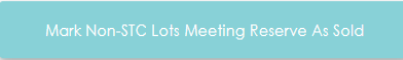


Instructions:

**1. Confirm Mark as Sold Modal**

- **Purpose:** This modal confirms the admin's decision to manually mark a lot as sold.
- **Actions:**
  - **Cancel:** Closes the modal without marking the lot as sold.
  - **Mark as Sold:** Confirms the action and changes the lot's status to "Sold."

**2. Confirm Mark as Unsold Modal**

- **Purpose:** This modal confirms the admin's decision to manually mark a lot as unsold.
- **Actions:**
  - **Cancel:** Closes the modal without marking the lot as unsold.
  - **Mark as Unsold:** Confirms the action and changes the lot's status to "Unsold."

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Auction History Tab	Displays a historical record of all auctioned lots, including top bidders, bid amounts, and lot statuses.
	Search Bar	Enables admins to search for specific lots or bidders within the auction history.
	Mark Non-STC Lots Meeting Reserve as Sold	A bulk action button to mark all non-STC (Subject to Confirmation) lots with met reserves as sold.
	Refresh Button	Reloads the auction history data to display the latest updates, including new bids or status changes.
	Download PDF	Downloads the post-auction information in PDF format.



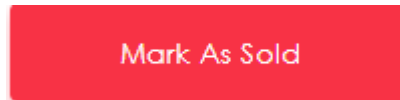
Download CSV

Downloads the post-auction information in CSV format.



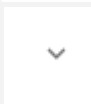
Mark as Unsold Button

Allows an admin to manually mark a lot as unsold if it was not successfully sold in the auction.



Mark as Sold Button

Allows an admin to manually mark a lot as sold, typically used for confirmed sales after the auction ends.



Expand and Collapse

Expand: Displays additional details or options related to a specific section, lot, or item when clicked. Useful for viewing more information without navigating away from the page.

Collapse: Hides the expanded details, keeping the interface clean and reducing clutter. Helps streamline the view for better usability.

Items per page 10 ▼

Items Per Page Selector

Allows the admin to adjust the number of lots displayed per page.



Mark This Bid as the Winning Bid Icon

Allows the admin to manually mark a specific bid as the winning bid for the lot.



# Invoicing

## Pro-Formas

Timed

Tender

The screenshot shows the 'Invoicing' section of the Auction Management system. At the top, there is a 'Select Auction' dropdown menu currently set to 'Admin Documents'. Below this is a navigation bar with tabs for 'AUCTION OVERVIEW', 'REGISTERED USERS', 'WISHLIST', 'AUCTION HISTORY', and 'INVOICING' (the active tab, labeled 1). Under the 'INVOICING' tab, there are sub-tabs for 'Pro-Formas' (labeled 2), 'Tax Invoices', and 'Release Notes'. A search bar (labeled 3) is located below the sub-tabs. The main content area features a table of Pro-Formas with columns: Doc.No. (labeled 4), Lot Number (labeled 5), Customer Name (labeled 6), Entity Type (labeled 11), Cust.Ref. (labeled 13), Date (labeled 14), Total (labeled 15), Status (labeled 16), and Actions (labeled 21). The table contains two rows of data. Row 1: Doc.No. PF0000022 (labeled 7), Lot Number 1 (labeled 10), Customer Name Chante Eygelaar, Entity Type Individual, Cust.Ref. P-65873, Date 2025-03-04, Total R 5,175.00, Status Not Sent. Row 2: Doc.No. PF0000023 (labeled 8), Lot Number 2, Customer Name PremBid, Entity Type Company, Cust.Ref. P-23526, Date 2025-03-04, Total R 7,475.00, Status Not Sent. Above the table are buttons for 'Email' (labeled 4), 'Download' (labeled 5), and 'Mark As Paid And Generate Invoice' (labeled 6). A 'Consolidate Pro-Formas' button (labeled 21) is also present. At the bottom, there is a summary section with 'TOTAL EXCL VAT R 11,000.00' (labeled 27) and 'TOTAL INCL VAT R 12,650.00' (labeled 28). A pagination bar (labeled 19) shows 'Rows per page 10', '1-2 of 2', and navigation arrows (labeled 22). On the right side, there are several utility icons: a lock (labeled 23), a document (labeled 24), a Wi-Fi signal (labeled 25), and a refresh (labeled 26).

Doc.No.	Lot Number	Customer Name	Entity Type	Cust.Ref.	Date	Total	Status	Actions
PF0000022	1	Chante Eygelaar	Individual	P-65873	2025-03-04	R 5,175.00	Not Sent	[Email] [Download] [Mark As Paid] [Refresh] [Close]
PF0000023	2	PremBid	Company	P-23526	2025-03-04	R 7,475.00	Not Sent	[Email] [Download] [Mark As Paid] [Refresh] [Close]

TOTAL EXCL VAT R 11,000.00    TOTAL INCL VAT R 12,650.00

Rows per page 10    1-2 of 2    [Navigation]

## Instructions:

### 1. **Invoicing Tab**

- The section where users can manage pro-formas, tax invoices, and release notes.

### 2. **Pro-Formas Tab**

- Displays the list of pro-formas related to invoicing.

### 3. **Search Bar**

- Allows users to search for specific pro-formas.

### 4. **Bulk Email**

- Sends multiple selected pro-forma invoices via email.

### 5. **Bulk Download**

- Downloads all selected pro-forma invoices in **both PDF and CSV formats** simultaneously.

### 6. **Mark as Paid and Generate Invoice Button**

- Marks the selected pro-formas as paid and generates an official invoice.
- **Note:** This option is **only available if more than 2 lots** have been selected.

### 7. **Bulk Select**

- Selects all pro-formas on the current page.

### 8. **Single Lot Select**

- Selects a single pro-forma for individual actions.

### 9. **Pro-Forma Document Number**

- Displays the unique document number for each pro-forma invoice.

### 10. **Lot Number**

- Identifies the auction lot associated with the pro-forma.

### 11. **Customer Name**

- Displays the customer associated with the pro-forma.

### 12. **Entity Type**

- Indicates whether the customer is an individual or a company.

### 13. **Customer Reference**

- Shows the customer's reference number.

### 14. **Date**

- The date the pro-forma invoice was generated.

### 15. **Total Amount**

- Displays the total value of the pro-forma.

### 16. **Status**

- Indicates the current status of the pro-forma. Possible statuses: **Not Sent, Sent/Unpaid, Paid/Invoiced, Cancelled, Consolidated**

### 17. **Consolidate Pro-Formas**

- Merges multiple selected pro-formas into a single invoice.

### 18. **Edit**

- Allows users to modify the pro-forma details.

### 19. **Download**

- Provides a direct download option for a single pro-forma.

### 20. **Email**

- Sends a specific pro-forma via email.

### 21. **Delete**

- Removes the selected pro-forma from the list.

### 22. **Cancellation Note**

- Only consolidated pro-formas can be cancelled.

### 23. **PDF Download**

- Downloads the pro-forma in **PDF format**.

### 24. **CSV Download**

- Downloads the pro-forma in **CSV format**.

### 25. **Filters**

- Allows filtering pro-formas based on their **status**.

### 26. **Refresh**

- Refreshes the list to show the latest data.

### 27. **Total Excl. VAT**

- Shows the total amount excluding VAT.

### 28. **Total Incl. VAT**

- Displays the total amount including VAT.

### 29. **Rows per Page**

- Allows users to set the number of pro-formas displayed per page.

### 30. **Current Page Indicator**

- Displays the current page number and total pages.

### 31. **Pagination Controls**

- Allows users to navigate through multiple pages of pro-formas.

## Email Button Modal

Select Auction

Email Invoice

Doc.No.	Lot Number	Customer Name	Entity Type	Cust.Ref.	To	Cc
PF00000022	1	Chante Eygelaar	Individual	P-65873	chante@randtechsa.co.za	
PF00000023	2	PremBid	Company	P-23526	CHANTE_ALIAS_TEST@RANDTECHSA.CO.ZA	

Rows per page: 10 ▾ 1-2 of 2 |< < > >|

Send Cancel

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

## Instructions:

1. **Email Invoice Header**
  - Indicates the purpose of the screen, which is to send invoices via email.
2. **Document Number (Doc.No.)**
  - Displays the unique identifier for each invoice.
3. **Lot Number**
  - Identifies the auction lot associated with the invoice.
4. **Customer Name**
  - Shows the name of the customer receiving the invoice.
5. **Entity Type**
  - Indicates whether the customer is an **Individual** or a **Company**.
6. **Customer Reference (Cust. Ref.)**
  - Displays the customer's reference number.
7. **"To" Field**
  - Primary email recipient for the invoice.
8. **Email Address Input (To Field)**
  - Field where the user enters or verifies the primary recipient's email address.
9. **"Cc" Field**
  - Allows users to add additional recipients for the invoice email.
10. **Email Address Input (Cc Field)**
  - Field where users can enter secondary email addresses for copies of the invoice.
11. **Rows per Page**
  - Controls the number of invoices displayed per page.
12. **Current Page Indicator**
  - Displays the current page number and the total number of pages.
13. **Pagination Controls**
  - Allows users to navigate between different pages of invoices.
14. **Send Button**
  - Sends the email invoice to the specified recipients.
15. **Cancel Button**
  - Cancels the email process and returns to the previous screen.

### Consolidate Pro-Forma Invoices Modal

Consolidate Pro-Forma Invoices — 1

Pro-Forma Invoices will be consolidated on the customer reference by selecting two or more pro-forma invoices per customer reference.

2

3 4 5 6 7 8 9 10 11 12

Cust.Ref.	Expand	Doc.No. ↑	Lot Number	Customer Name	Entity Type	Date	Total	Status
P-23526 (2)	<input type="checkbox"/>							
13 14 >	<input type="checkbox"/>	PF00000023	2	PremBid	Company	2025-03-04	R 7,475.00	Sent/Unpaid
>	<input type="checkbox"/>	PF00000024	3	PremBid	Company	2025-03-04	R 5,175.00	Not Sent

15 Consolidate Cancel 16

### Consolidate Pro-Formas confirmation modal

Consolidate Pro-Forma Invoices

Are you sure you want to consolidate the 2 selected Pro-Forma Invoices for customer reference P-23526?

No Yes

## Instructions:

### **Consolidate Pro-Forma Invoices Modal**

1. **Consolidate Pro-Forma Heading**
  - Displays the title of the modal.
2. **Search Bar**
  - Allows users to search for specific pro-forma invoices.
3. **Customer Reference (Cust. Ref.)**
  - Displays the unique customer reference number.
4. **Expand**
  - Selection box that allows users to expand and view multiple pro-formas under the same customer reference.
5. **Document Number (Doc. No.)**
  - Displays the unique identifier for each pro-forma invoice.
6. **Lot Number**
  - Identifies the auction lot associated with each pro-forma invoice.
7. **Customer Name**
  - Displays the name of the customer.
8. **Entity Type**
  - Indicates whether the customer is an **Individual** or a **Company**.
9. **Date**
  - Shows the date the pro-forma invoice was generated.
10. **Total Amount**
  - Displays the total value of each pro-forma invoice.
11. **Status**
  - Indicates the current status of the pro-forma invoice (e.g., Not Sent, Sent/Unpaid).
12. **Refresh Button**
  - Refreshes the pro-forma invoice list.
13. **Displays the Consolidated Amount**
  - Shows the number of selected pro-formas for consolidation.
14. **Expand/Collapse Selection Box**
  - Allows users to expand or collapse the pro-formas under a specific customer reference to view or hide individual invoices.
15. **Consolidate Button**
  - Merges the selected pro-formas into a single consolidated invoice.

## 16. **Cancel Button**

- Cancels the consolidation process and exits the modal.

## **Consolidate Pro-Formas Confirmation Modal**

### 1. **Confirmation Header**

- Displays the title "**Consolidate Pro-Forma Invoices**".

### 2. **Confirmation Message**

- Asks the user to confirm whether they want to consolidate the selected pro-formas.

### 3. **No Button**

- Cancels the consolidation process.

### 4. **Yes Button**

- Confirms and consolidates the selected pro-formas.

Once consolidated:

<input type="checkbox"/>	Doc.No. ↑	Lot Number	Customer Name	Entity Type	Cust.Ref.	Date	Total	Status	Actions
<input type="checkbox"/>	PF00000022 INV00000007	1	Chante Eygelaar	Individual	P-65873	2025-03-04	R 5,175.00	Paid/Invoiced	
<input type="checkbox"/>	PF00000023	2	PremBid	Company	P-23526	2025-03-04	R 4,000.00	Not Sent	
<input type="checkbox"/>	PF00000024	3	PremBid	Company	P-23526	2025-03-04	R 5,175.00	Not Sent	
<input type="checkbox"/>	PF00000025	2,3	PremBid	Company	P-23526	2025-03-04	R 9,175.00	Cancelled	

TOTAL EXCL VAT R 13,000.00    TOTAL INCL VAT R 14,350.00

Rows per page 10 ▾ 1-4 of 4 << < > >>

## Instructions:

### **1. Represents the Two Lots That Will Be Consolidated Together**

- Indicates the lots that will be grouped into a single consolidated invoice.

### **2. Once Consolidated, the Lots Will Display Together – Status: "Not Sent"**

- After consolidation, the grouped lots appear under a single invoice, and their status updates to "Not Sent" until further action is taken.

### **3. When Cancelled, the Status Will Be "Cancelled"**

- If a consolidated invoice is cancelled, its status will reflect "Cancelled."
- The lots can be consolidated again, and a duplicate entry will appear to keep track of the first cancelled attempt.

### **4. Cancel Consolidated Invoice**

- Allows the user to cancel a consolidated invoice.
- If the invoice is not yet cancelled, the icon appears **blue** (active).
- Once cancelled, the icon turns **grey** (disabled).

### **5. Bulk Selection**

- Enables bulk actions such as emailing, downloading, marking as paid, or generating an invoice.
- When selected, bulk options are available; when not selected, they remain greyed out.

### **6. Single Selection**

- Allows selecting an individual invoice for actions like editing, emailing, or downloading.

Actions: Edit Part 1

Pro Forma	From	To
Number <input type="text" value="PF00000023"/>	Company <input type="text" value="Company"/>	Customer <input type="text" value="PremBid"/>
Reference <input type="text" value="P-23526"/>	Vat No <input type="text" value="Vat No"/>	Email <input type="text" value="CHANTE_ALIAS_TEST@RANDRTE"/>
Date <input type="text" value="2025-03-04"/>	Address <input type="text" value="Address Line 1"/>	Vat No <input type="text" value="Vat No"/>
	<input type="text" value="Address Line 2"/>	Address <input type="text" value="Address Line 1"/>
	<input type="text" value="City"/>	<input type="text" value="Address Line 2"/>
	<input type="text" value="State/Province"/>	<input type="text" value="City"/>
	<input type="text" value="Postal Code"/>	<input type="text" value="State/Province"/>
		<input type="text" value="Postal Code"/>
		<input type="text" value="support@randrtechsa.com"/>



Instructions:

**Actions: Edit Part 1**

- **Pro Forma Number**
  - Displays the unique pro forma number for the invoice.
  - **Note:** This field **cannot** be edited.
- **Reference**
  - Displays the reference number associated with the pro forma invoice.
- **Date**
  - The date the pro forma invoice was generated.
- **From (Company Details)**
  - Displays the company issuing the invoice.
  - Includes VAT number and address fields.
- **To (Customer Details)**
  - Displays the customer receiving the invoice.
  - Includes email, VAT number, and address fields.

Actions: Edit Part 2

⌵	Description	Zero Rate VAT	Total Excl.	Actions
⌵				2
>	Lot 2 - Test 2	<input checked="" type="checkbox"/> 1	R 4,000.00	+ -
>	Doc Fees	<input type="checkbox"/>	R 2,500.00	+ -

Enter a note

Total Excl. VAT: R 6,500.00  
VAT: R 375.00  
Total Incl. VAT: R 6,875.00

BALANCE DUE

Bank  
Demo FNB Account

Please make Payment to:  
Bank: First National Bank  
Account Name: Demo FNB Account  
Branch Code: 632005  
Branch Name: Rosebank  
Account Number: 42678945128  
SWIFT Code:

4 Save      5 Save + Email      6 Cancel

## Instructions

### **Actions: Edit Part 2**

#### **1. Zero Rate VAT Selection**

- Checkbox to indicate whether the item is zero-rated for VAT purposes.

#### **2. Add a Cost**

- Clicking the **green plus (+) button** allows the user to add additional costs or line items to the invoice.

#### **3. Delete a Cost**

- Clicking the **red minus (-) button** removes an item or cost from the invoice.

#### **4. Save and Close**

- Saves the changes and closes the editing screen.

#### **5. Save and Email**

- Saves the changes and sends the updated pro forma invoice via email.

#### **6. Cancel**

- Cancels the changes and exits the editing screen without saving.

Email button within the invoice - Modal

The image shows a modal window titled "Email Invoice". It contains two text input fields for email addresses. The first field is labeled "To:" and contains the email address "chante@randrtechsa.co.za". The second field is labeled "Cc:" and contains the placeholder text "Email Address". At the bottom right of the modal, there are two buttons: a teal "Send" button and a red "Cancel" button. Five numbered callouts are present: 1 points to the title, 2 points to the "To:" label, 3 points to the "Cc:" label, 4 points to the "Send" button, and 5 points to the "Cancel" button.

Email Invoice

To: Email Address\*  
chante@randrtechsa.co.za

Cc: Email Address

Send Cancel

Instructions:

**Email Invoice Modal**

1. **Email Invoice Header**

- Displays the title "**Email Invoice**" at the top of the modal.

2. **To:** (Email Address Field)

- Input field for entering the primary recipient's email address.
- This field is required.

3. **CC:** (Email Address Field)

- Optional input field to add additional recipients in CC.
- Multiple email addresses can be entered, separated by commas.

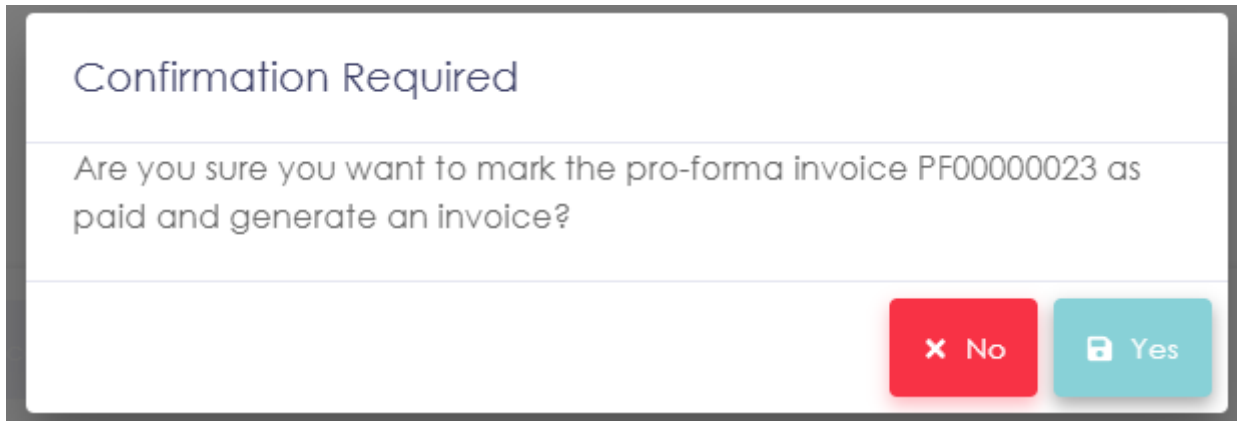
4. **Save**

- Sends the email with the invoice attached.

5. **Cancel**

- Closes the modal without sending the email.

## Mark as Paid and Generate invoice Icon - Modal



Instructions:

### Mark as Paid and Generate Invoice Modal

- **Modal Header:** "Mark as Paid & Generate Invoice"
- **Confirmation Message:** "Are you sure you want to mark pro-forma invoice i.e. PF00000023 as paid and generate an invoice?"
- **Options:**
  1. **No** – Closes the modal without making any changes.
  2. **Yes** – Confirms the action, marks the pro-forma invoice as paid, and generates the final invoice

# Tax invoices

Timed

Tender

The screenshot displays the 'Auction Management' interface, specifically the 'INVOICING' tab. The interface includes a search bar, a table of tax invoices, and a summary section at the bottom. Numbered callouts (1-28) identify various UI elements:

- 1: Release Notes link
- 2: Search input field
- 3: Search icon
- 4: Email button
- 5: Download button
- 6: Checkmark in table header
- 7: Table row
- 8: Doc.No. header
- 9: Lot Number header
- 10: Customer Name header
- 11: Entity Type header
- 12: Cust.Ref. header
- 13: Date header
- 14: Total header
- 15: Status header
- 16: Edit icon
- 17: Download icon
- 18: Rows per page dropdown
- 19: Page navigation icons
- 20: Email icon
- 21: Download icon
- 22: Refresh icon
- 23: Share icon
- 24: TOTAL EXCL VAT R 4,500.00
- 25: TOTAL INCL VAT R 5,175.00
- 26: Rows per page dropdown
- 27: Page navigation icons
- 28: Page navigation icons

Doc.No. ↑	Lot Number	Customer Name	Entity Type	Cust.Ref.	Date	Total	Status	Actions
PF00000022 INV00000007	1	Chante Eygelaar	Individual	P-65873	2025-03-04	R 5,175.00	Not Sent	[Edit] [Download] [Refresh] [Share]

TOTAL EXCL VAT R 4,500.00      TOTAL INCL VAT R 5,175.00

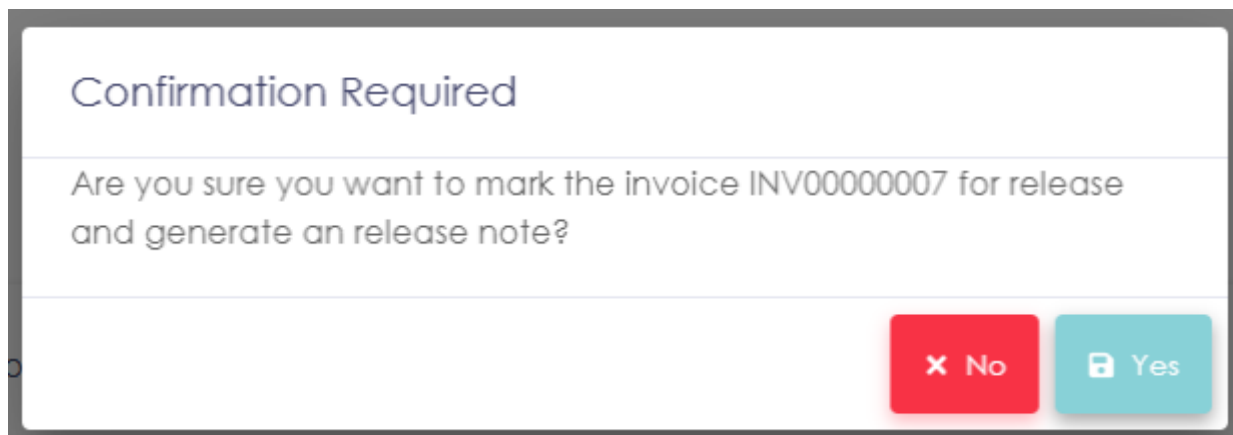
Rows per page 10 ▾    1-1 of 1    << < > >>

## Instructions:

1. **Tax Invoices Tab** – This tab provides access to all generated tax invoices related to a specific auction.
2. **Search Bar** – Allows users to search for specific tax invoices using keywords such as document number, customer name, or lot number.
3. **Bulk Email** – Sends multiple selected tax invoices via email to the respective recipients.
4. **Bulk Download** – Downloads multiple selected tax invoices in PDF format.
5. **Bulk Mark for Release** – Marks multiple selected invoices as "Released," updating their status accordingly.
6. **Bulk Selection Tick Box** – Allows users to select multiple invoices. Bulk action buttons will only be enabled once at least one invoice is selected.
7. **Single Lot Selection Tick Box** – Enables users to select an individual invoice for actions such as email, download, or release marking.
8. **Document Number** – Displays the invoice document number. Once a tax invoice is generated, an invoice number appears under the corresponding pro-forma invoice number.
9. **Lot Number** – Indicates the lot associated with the invoice.
10. **Customer Name** – Displays the name of the customer who received the invoice.
11. **Entity Type** – Specifies whether the customer is an **Individual** or a **Company**.
12. **Customer Reference** – Shows a unique reference assigned to the customer.
13. **Date Created** – Displays the date the tax invoice was generated.
14. **Total** – Represents the total invoice amount, including VAT.
15. **Status** – Indicates the current status of the invoice:
  - **Not Sent** – The invoice has not been sent to the customer.
  - **Sent/Not Marked for Release** – The invoice has been sent but is not yet marked for release.
  - **Marked for Release** – The invoice has been released.
16. **Edit Tax Invoice** – Allows users to modify invoice details before sending or marking for release.
17. **Download Tax Invoice** – Downloads an individual tax invoice in PDF format.
18. **Email Tax Invoice** – Sends an individual tax invoice via email.
19. **Mark for Release** – Updates the invoice status to "Released." The icon appears blue when the invoice is **not yet released** and turns **grey** once marked as released.
20. **Download as PDF** – Downloads all displayed invoices in a single PDF file.
21. **Download as CSV** – Exports invoice data into a CSV format for further processing.

22. **Filter** – Provides filtering options to refine the displayed invoice list based on different criteria.
23. **Refresh Button** – Reloads the invoice list to reflect any new changes or updates.
24. **Total Excluding VAT** – Displays the total invoice amount before VAT is applied.
25. **Total Including VAT** – Shows the total invoice amount with VAT included.
26. **Rows per Page** – Adjusts the number of invoices displayed per page.
27. **Page Number** – Indicates the current page being viewed within the invoice list.
28. **Pagination Actions** – Provides navigation controls to move between different pages of invoices.

## Mark for Release - Modal



### Mark for Release Modal

- **Modal Header:** "Mark for Release"
- **Confirmation Message:** "Are you sure you want to mark the invoice i.e. PF00000023 for release and generate a release note?"
- **Options:**
  1. **No** – Closes the modal without making any changes.
  2. **Yes** – Confirms the action, marks the invoice for release, and generates a release note.

## Release Notes

Timed

Tender

The screenshot shows a web application interface for 'Release Notes'. At the top, there are navigation tabs: 'Pro-Formas', 'Tax Invoices', and 'Release Notes' (1). Below the tabs is a search bar (2) and a list of actions: 'Email' (3) and 'Download' (4). A status indicator shows '1 of 1 Release Notes'. A table (5) lists release notes with columns: 'Doc.No.' (7), 'Lot Number' (8), 'Customer Name' (9), 'Entity Type' (10), 'Cust.Ref.' (11), 'Date' (12), 'Total' (13), 'Status' (14), and 'Actions' (17). The first row (6) contains: 'PF0000022', 'INV0000007', '1', 'Chante Eygekar', 'Individual', 'P-65873', '2025-03-04', 'R 5,175.00', 'Not Sent', and three action icons (15). A 'Filter by Status' dropdown (16) is located below the table. At the bottom, there are summary totals: 'TOTAL EXCL VAT R 4,500.00' (22) and 'TOTAL INCL VAT R 5,175.00' (23). The footer (24) includes 'Rows per page 10', '1-1 of 1', and navigation arrows (25, 26). Additional callouts (18, 19, 20, 21) point to icons in the top right corner.

Doc.No.	Lot Number	Customer Name	Entity Type	Cust.Ref.	Date	Total	Status	Actions
PF0000022 INV0000007 IN0000004	1	Chante Eygekar	Individual	P-65873	2025-03-04	R 5,175.00	Not Sent	[Email] [Download] [More]

TOTAL EXCL VAT R 4,500.00      TOTAL INCL VAT R 5,175.00

Rows per page 10      1-1 of 1      [Navigation]

## Instructions:

1. **Release Notes Tab**
  - Navigates to the release notes section.
2. **Search Bar**
  - Allows searching for specific release notes using keywords.
3. **Bulk Email**
  - Sends selected release notes via email in bulk.
4. **Bulk Download**
  - Downloads multiple release notes at once.
5. **Bulk Selection Icon**
  - Enables selection of multiple records for bulk actions.
6. **Single Lot Selection Tick Box**
  - Allows selecting an individual record.
7. **Document Number**
  - Displays the proforma, tax invoice, and release note numbers once marked for release.
8. **Lot Number**
  - The lot associated with the release note.
9. **Customer Name**
  - Name of the customer linked to the release note.
10. **Entity Type**
  - Defines whether the customer is an individual or company.
11. **Customer Reference**
  - A unique reference number associated with the customer.
12. **Date Created**
  - The date the release note was generated.
13. **Total Amount**
  - The total value of the release note, including VAT.
14. **Status**
  - Indicates whether the release note has been sent or remains unsent.
15. **Edit Release Note**
  - Enables modifications to the release note before sending.
16. **Download Release Note**
  - Allows downloading a single release note.
17. **Email to Customer**
  - Send the selected release note via email.

**18. Download PDF**

- Exports release notes in PDF format.

**19. Download CSV**

- Exports release notes in CSV format.

**20. Filter**

- Allows filtering release notes based on various criteria.

**21. Refresh**

- Refreshes the release notes table to reflect the latest data.

**22. Total Excluding VAT**

- Displays the total amount before VAT is applied.

**23. Total Including VAT**

- Shows the final amount after VAT is included.

**24. Rows Per Page**






- Controls how many records are displayed per page.








**25. Page Number Indicator**

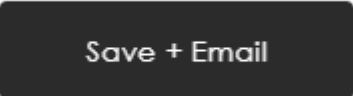







- Shows the current page number.




**26. Pagination Controls**

- Allows navigation through multiple pages of release notes.

<u>Icon</u>	<u>Name</u>	<u>Description</u>
	Pro-Formas tab	Displays all pro-forma invoices.
	Tax Invoice Tab	Lists tax invoices issued to customers.
	Release Notes tab	Shows release notes linked to invoices.
	Search Bar	Allows searching for invoices, release notes, or pro-formas.
	Tick box	Selects individual or multiple records for bulk actions.

	Download PDF	Exports the pro-formas, tax invoices or release notes as a PDF.
	Download CSV	Downloads the pro-formas, tax invoices or release notes in CSV format for spreadsheets.
	Filter	Narrows down records based on selected criteria.
	Refresh button	Updates the displayed data to reflect the latest changes
	Consolidate Pro-formas	Merges multiple pro-forma invoices into one.
 	<ol style="list-style-type: none"> <li>1. Edit invoice</li> <li>2. Save changes</li> <li>3. Save and email invoice</li> <li>4. Cancel edit</li> </ol>	<ol style="list-style-type: none"> <li>1. Opens an invoice for editing.</li> <li>2. Saves any modifications made to the invoice.</li> <li>3. Saves changes and emails the invoice to the customer.</li> <li>4. Discards changes and exits edit mode.</li> </ol>

		
		
	Download invoice	Downloads the final invoice.
  	<ol style="list-style-type: none"> <li>1. Email invoice</li> <li>2. Send email</li> <li>3. Cancel email</li> </ol>	<ol style="list-style-type: none"> <li>1. Send the invoice via email.</li> <li>2. Confirms and sends an email with the invoice attached.</li> <li>3. Stops the email from being sent.</li> </ol>
	Mark as paid and Generate invoice	Confirms payment and issues a tax invoice.
	Cancel consolidated pro- forma	Reverts a previously consolidated pro-forma.

	Mark for release	Marks the release note as ready to send - Grey release notes have already been generated Blue - Release notes have yet to be generated
<div data-bbox="309 379 456 491">Email</div> <div data-bbox="309 523 517 635">Download</div> <div data-bbox="309 667 748 746">Mark As Paid And Generate Invoice</div>	<ol style="list-style-type: none"> <li>1. Bulk email</li> <li>2. Bulk Download</li> <li>3. Bulk Mark as paid and generate invoice</li> </ol>	<ol style="list-style-type: none"> <li>1. Send multiple invoices or release notes at once.</li> <li>2. Downloads multiple invoices in one action.</li> <li>3. Processes multiple invoices as paid.</li> </ol>
<div data-bbox="309 778 456 884">Yes</div> <div data-bbox="309 916 456 1021">No</div>	Mark as paid and generate invoice confirmation or cancelation	Confirms or cancels marking an invoice as paid.
	Add extra charge	Adds additional fees or adjustments to an invoice.
	Delete charge	Removes an extra charge from the invoice.

# Auction Management

## Tender

### Auction Management Screen

#### Key Features:

##### 1. Search Functionality:

- Locate a specific auction by typing its name into the search bar.
- Alternatively, select an auction from the **drop-down menu** containing all saved auctions.

##### 2. Auction Selection Options:

- **Search Bar:** Start typing the auction name to see real-time suggestions.
- **Drop-down Menu:** Browse and choose from the full menu of saved auctions.

# Auction Overview

## Tender

**Auction Management** 1

Select Auction  
Admin Documents 2 3 X v 4

**AUCTION OVERVIEW** REGISTERED USERS WISHLIST AUCTION HISTORY INVOICING

5

Current Auction Total 7  
Reserve Met Total 8  
Reserve Not Met Total 9

7.1 R 2,000.00  
8.1 R 0.00  
9.1 R 2,000.00


Number of Lots 10  
Reserve Met Lots 11  
Lots with Tenders 12  
Reserve Not Met Lots 13

10.1 1  
11.1 0  
12.1 1  
13.1 1

Open Lots 14  
Extended Lots 15  
Completed Lots 16

6  
14.1 1  
15.1 0  
16.1 0

17 Search... 18 Search Lot Number... 19 Time: Remaining 20 21 22 23

Number 24	Image 25	Name 26	Top Bid/Time Remaining 27	Status 28	Reserve Amount/Met 29	23
1 24.1	 25.1	Test 1 26.1	R 2,000.00 P-59979 (Chante Boop) OD 9H 47M 46S 27.2 27.3 27.4	Open 28.1	R 10,000.00 No 29.1 29.2	30 v

Custom Data 32 31 ^

Field 1: Male Field 2: Female Field 3: Size 33

Reorder Lots 34

35 Items per page 100 v 1-1 of 1

36

## **Instructions:**

### **1. Screen Title:**

- Displays the title "*Auction Management*" for easy navigation and identification of the screen.

### **2. Selected Auction Field:**

- Displays the name of the currently selected auction (e.g., "Timed 1 Lot").

### **3. Clear Selection Button:**

- Clears the selected auction name.

### **4. Drop-down Menu (Search):**

- Allows users to select an auction from a list of available options by clicking the drop-down arrow.

### **5. Tabs Section:**

- Provides navigation between different sections related to the selected auction (e.g., Overview, Registered Users, Wishlist, History, Invoicing).

### **6. Refresh Button:**

- Updates the displayed information to ensure real-time accuracy.

### **7. Current Auction Total:**

- Displays the total monetary value of the current auction.
- **7.1:** Current auction total monetary amount.

### **8. Reserve Met Total:**

- Shows the total monetary value of items that have met their reserve prices.
- **8.1:** Reserve Met Total (total value for items with met reserves).

### **9. Reserve Not Met Total:**

- Indicates the total monetary value of items that have not yet met their reserve prices.
- **9.1:** Total value for non-met reserve.

### **10. Number of Lots:**

- Displays the total number of lots available in the auction.
- **10.1:** Total number of lots.

### **11. Reserve Met Lots Count:**

- Indicates the number of lots where the reserve price has been met.
- **11.1:** Number of Reserve Met Lots.

### **12. Lots with tenders Count:**

- Shows the number of lots that have active tenders.
- **12.1:** Number of Lots with tenders.

**13. Reserve Not Met Lots Count:**

- Reflects the number of lots where the reserve price has not been met.
- **13.1:** Number of Reserve Not Met Lots.

**14. Open Lots Count:**

- Displays the number of lots that are currently open for bidding.
- **14.1:** Number of Open Lots.

**15. Extended Lots Count:**

- Indicates the number of lots that have had their bidding time extended.
- **15.1:** Number of Extended Lots.

**16. Completed Lots Count:**

- Shows the number of lots for which the auction has ended.
- **16.1:** Number of Completed Lots.

**17. Search Bar (General):**

- Allows users to search for specific items or details within the auction.

**18. Search Bar (Lot Number):**

- Allows users to search for a specific lot by its number.

**19. Filter Options:**

- Filters for time remaining, opening bid (low to high, high to low), and ascending/descending order of lots.

**20. Filter Drop-down:**

- Provides options to refine results based on specific criteria.

**21. Refresh Button:**

- Updates the auction data and settings.

**22. Download Auction Catalog (PDF):**

- Allows users to download a full catalog of the auction in PDF format.

**23. Download Auction Overview (CSV):**

- Enables downloading an overview of the auction in CSV format for external analysis.

**24. Lot Number Column:**

- Displays the unique number assigned to each lot.
- **24.1:** Lot number.

**25. Image Column:**

- Shows a thumbnail of the item associated with each lot.
- **25.1:** Lot image.

**26. Lot Name Column:**

- Displays the name or description of the item in the lot.
- **26.1:** Lot name.

**27. Top Bid and Remaining Time Column:**

- Displays the highest bid amount for the lot and the remaining time before the auction ends.
- **27.1:** Highest bid amount.
- **27.2:** Paddle number.
- **27.3:** Highest bidder name.
- **27.4:** Time remaining.
- **27.5:** Actions modal.

**28. Status Column:**

- Indicates the current status of the lot (e.g., *Open*, *Closed*, *Awaiting*, *Unavailable*).
- **28.1:** Lot status.

**29. Reserve Amount/Met Column:**

- Displays the reserve price and whether it has been met.
- **29.1:** Reserve price amount.
- **29.2:** Indicates if the reserve is met (*Yes/No*).

**30. Actions Drop-down:**

- Opens a drop-down to allow actions related to the auction or lots.
- **30.1:** Dropdown menu for custom data.

**31. Collapse Custom Data Button:**

- Allows users to collapse or expand custom data fields.

**32. Custom Data Header:**

- Displays the title or heading for the custom data section.

**33. Custom Data Fields:**

- Displays any additional data fields or information specific to the auction or lots.

**34. Reorder Lots Button:**

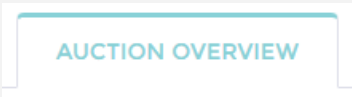

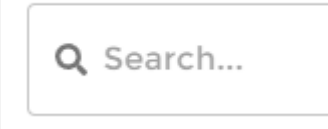
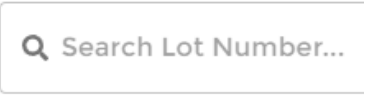
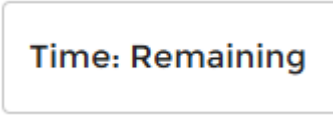
- A feature that lets users reorder the lots. This option only displays when lots are time-remaining.




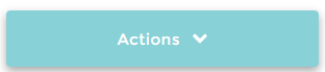
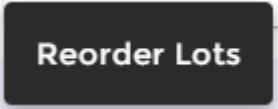
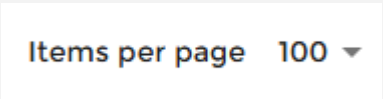
**35. Items Per Page Drop-down:**

- Adjusts how many lots are displayed per page (e.g., 10, 20, 50).

**36. Pagination Controls:**

- Allows users to navigate between pages of the auction lots.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Auction Overview Tab	Navigates to the main auction overview page displaying all relevant auction details.
	Refresh	Updates the current page to show the latest auction information.
	Search bar	Allows users to search for auctions by name or keyword.
	Search bar - Lot number	Enables searching for specific lots within an auction by their lot number.
	Filter	Allows users to filter the auction list based on: Time: Remaining – Filters lots based on the remaining time until the auction closes. Number: Ascending – Sorts lots in ascending order based on their lot number. Number: Descending – Sorts lots in descending order based on their lot number. Opening Bid: Low to High – Filters lots by opening bid amount from low to high. Opening Bid: High to Low – Filters lots by opening bid amount from high to low.

	Dropdown menu	Allows users to select different sorting or filtering options.
	Download Auction Catalogue in PDF	Downloads the auction catalogue as a PDF document.
	Download Auction Overview in CSV	Downloads the auction overview in a CSV file format for data analysis.
	Actions Modal	Opens a menu with various actions that can be taken on the selected auction.
	Reorder lots	This button only displays when the filter is set to "Time: Remaining." It functions similarly to a refresh button, allowing users to reorder the lots based on the remaining time. The default filter is "Time: Remaining," ensuring the lots are initially displayed according to the time left for bidding.
	Items per page	This dropdown allows users to select the number of lots displayed per page. Options typically include various preset numbers (e.g., 10, 25, 50, 100), helping users manage the amount of data visible on the screen at once.

1-1 of 1

Number of lots

This field displays the total number of lots available in the auction. It provides users with an overview of the auction's size and the extent of available items.

Actions Modal:

Tenders (1) 2 🔒

Top Tender 1  
**R 2,000.00**

AMOUNT	PADDLE NUMBER	DATE AND TIME STAMP	ACTIONS
R 2,000.00	JACK ATTACK P-09225	2024/12/12 07:54:04	

**Extend (Add 2 Minutes)** 3

Change Reserve Price  4

**🔒** 5

Extension confirmation modal

**Add Extension**

---

Are you sure you want to add an extension?

✕ Cancel🔒 Confirm

## Instructions:

### 1. **Actions Modal Header**

The title indicating this section is for actions related to the tender.

### 2. **Expand/Collapse Actions**

A button to expand or collapse the actions available for the tender.

### 3. **Extend (Add 2 Minutes)**

A button allowing the user to extend the auction time by two minutes.

### 4. **Change Reserve Price**

An input field where users can update the reserve price for the tender.


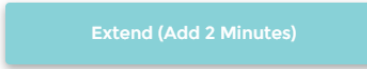
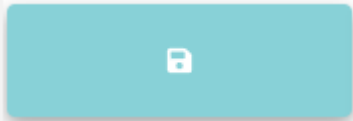

### 5. **Save Reserve Price**

A button to save the updated reserve price after making changes.

## **Extension Confirmation Modal**

A pop-up that appears when the user selects the extension option, confirming whether they want to proceed.

- **Cancel Button** – Cancels the extension action.
- **Confirm Button** – Confirms and applies the extension

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Lock Auction	Locks the auction to prevent further bidding or changes.
	Add 2 min to lot	Extends the auction duration for the selected lot by 2 minutes.
	Save changes	Saves any modifications made to the auction or lot details.
	Change reserve price	Enables the user to adjust the reserve price for the selected lot.

**Wishlist tab**

**Tender**

The screenshot displays the 'Wishlist' tab within a 'Tender' section. The interface includes a navigation bar with tabs for 'AUCTION OVERVIEW', 'REGISTERED USERS', 'WISHLIST', 'AUCTION HISTORY', and 'INVOICING'. Below the navigation is a search bar (2) and a refresh icon (9). A table lists items with columns: Number (3), Image (4), Name (5), SKU Number (6), and Sold (7). One item is shown with the number '4', an image of a house, the name 'Tender 1', and a 'No' status (8). Below the table is a 'Profiles' section with its own search bar (10) and refresh icon (15). The profile table has columns: Name (11), Contact (12), Type (13), and Wishlist Date (14). One profile is listed: 'Chante Eygelaar', 'chante@randtechsa.co.za', 'IndividualProfile', and '2025/03/05 14:26'. At the bottom right, there are two pagination controls (16 and 17) showing 'Items per page 10' and '1-1 of 1'.

## Instructions:

### 1. **Wishlist Tab**

Indicates the user is viewing the Wishlist section.

### 2. **Search Bar (Items)**

Allows users to search for specific wishlist items.

### 3. **Number**

Displays the unique identifier of the wishlist item.

### 4. **Image**

Shows a thumbnail image of the wishlist item.

### 5. **Name**

Displays the name of the wishlist item.

### 6. **SKU Number**

The stock-keeping unit (SKU) associated with the wishlist item.

### 7. **Sold Status**

Indicates whether the item has been sold.

### 8. **Expand/Collapse Wishlist Item**

Toggles additional details about the wishlist item.

### 9. **Refresh Wishlist**

Updates the wishlist to reflect the latest changes.

### 10. **Search Bar (Profiles)**

Allows users to search for profiles associated with the wishlist.

### 11. **Name (Profile)**

Displays the name of the user who added the item to their wishlist.

### 12. **Contact**

Shows the email or contact details of the user.

### 13. **Type**

Indicates the type of profile (e.g., Individual Profile).

### 14. **Wishlist Date**

Displays the date and time when the item was added to the wishlist.

### 15. **Refresh Profiles**

Updates the profiles section with the latest data.

### 16. **Items Per Page (Profiles)**

Allows users to set the number of profiles displayed per page.

### 17. **Items Per Page (Wishlist Items)**

Allows users to set the number of wishlist items displayed per page.

# Auction History

## Tender

Navigation: AUCTION OVERVIEW | REGISTERED USERS | WISHLIST | **AUCTION HISTORY** | INVOICING

13 14 15

2 Search...

12 Mark Non-STC Lots Meeting Reserve As Sold

3 Number	4 Image	Top Tender Name	6 Top Tender Contact	7 Top Tender	8 Paddle Number	9 SKU Number	10 Reserve	11 Reserve Met	17
1		Chante Eyelaar	chante@randtechsa.co.za	R 2,000.00	P-65873		R 0.00	Yes 16	Mark As Unsold
2		Chante Eyelaar	chante@randtechsa.co.za	R 10,000.00	P-65873		R 0.00	Yes 18	Mark As Sold

19 Items per page 10 20 1-2 of 2

## Instructions:

### 1. **Auction History Tab**

- Displays a historical record of all auctioned lots, including top tenders, bid amounts, and lot statuses.

### 2. **Search Bar**

- Enables admins to search for specific lots or tenders within the auction history.

### 3. **Lot Number**

- Displays the unique number assigned to the auctioned lot.

### 4. **Lot Image**

- A thumbnail preview of the auction item.

### 5. **Top Tender Name**

- Shows the name of the highest tender for the lot.

### 6. **Top Tender Contact**

- Displays the email or contact information of the highest tender.

### 7. **Top Tender Amount**

- The highest tender placed on the lot.

### 8. **Paddle Number**

- The unique tender paddle number assigned to the highest tender.

### 9. **SKU Number**

- The stock-keeping unit (SKU) associated with the lot for tracking.

### 10. **Reserve Amount**

- The minimum price required for the lot to be sold.

### 11. **Reserve Met Indicator**

- Displays whether the reserve price has been met (Yes/No).

### 12. **Mark Non-STC Lots Meeting Reserve as Sold**

- A bulk action button to mark all non-STC (Subject to Confirmation) lots with met reserves as sold.

### 13. **Refresh Button**

- Reloads the auction history data to display the latest updates, including new tenders or status changes.

### 14. **Download PDF**

- Downloads the post-auction information in PDF format.

### 15. **Download CSV**

- Downloads the post-auction information in CSV format.

### 16. **Mark as Unsold Button**

- Allows an admin to manually mark a lot as unsold if it was not successfully sold in the auction.

#### **17. Mark as Sold Button**

- Allows an admin to manually mark a lot as sold, typically used for confirmed sales after the auction ends.

#### **18. Dropdown Action Menu for Each Lot**

- Provides additional information on the lots, such as top tender details and tender history.

#### **19. Dropdown Action Menu for Each Lot**

- Provides additional information on the lots, such as top tender details and bidding history.


#### **20. Items Per Page Selector**

- Allows the admin to adjust the number of lots displayed per page.

#### **21. Pagination Info**

- Displays the current range of items shown and the total number of lots in the auction history.

Dropdown menu 18 and 19 - See above descriptions

2  Tarien Eygelaar CHANTE\_ALIAS\_TEST@RANDRTECHSA.CO.ZA R 4,000.00 P-23526 R 0.00 Tim Mark As Sold 1

Top Bidder: Company 3

Company Name: PremBid Trading Name: Registration Number: VAT Number: Contact First Name: Tarien Contact Last Name: Eygelaar Contact Email: CHANTE\_ALIAS\_TEST@RANDRTECHSA.CO.ZA 2  
Contact Phone Number: support@randrtechsa.com

History 5 4

NAME	CONTACT	PADDLE NUMBER	DATE	TIME STAMP	AMOUNT	ACTIONS
Tarien Eygelaar	CHANTE_ALIAS_TEST@RANDRTECHSA.CO.ZA	P-23526	2025-03-04	10:08:07	R 4,000.00	<span>6</span> <span>7</span>
Chante Eygelaar	chante@randrtechsa.co.za	P-65873	2025-03-04	09:42:57	R 2,000.00	<span>8</span>

## Instructions:

### 1. **Collapse All Dropdowns under Lot 2**

- Closes all expanded sections related to this lot, including tender details and bidding history.

### 2. **Collapse Top Bidder Info**

- Closes the section displaying the top tender's company details and contact information.

### 3. **Top tender Tab**

- Displays information about the top tender, including company name, trading name, registration number, VAT number, and contact details.

### 4. **Collapse History Tab**

- Closes the tender history section for this lot.

### 5. **History Tab**

- Shows the detailed tender history for the lot, including tender names, contact details, paddle numbers, tender amounts, and timestamps.

### 6. **Download PDF**

- Downloads the tender history in PDF format for record-keeping or reporting purposes.

### 7. **Download CSV**

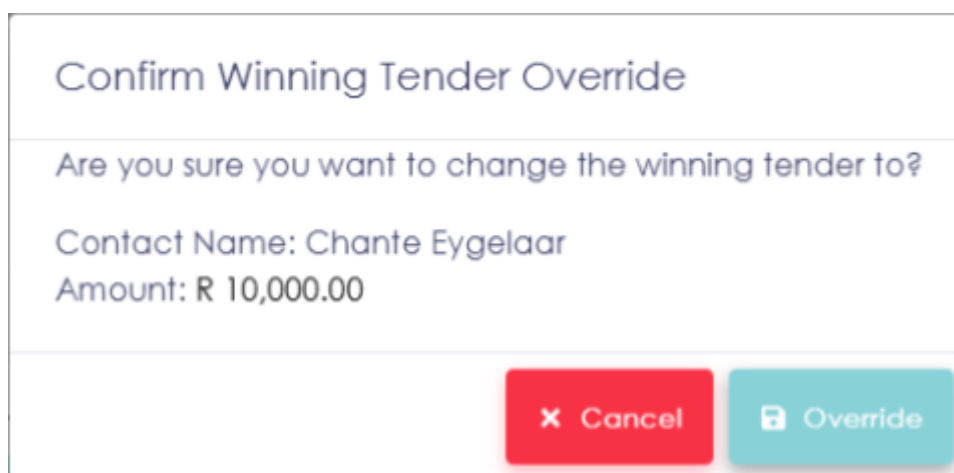
- Downloads the tender history in CSV format for easy data analysis.

### 8. **Mark This tender as the Winning tender Icon**

- Allows the admin to manually mark a specific tender as the winning tender for the lot.

### Mark This Bid as the Winning Tender Icon Modal

- **Purpose:** This modal appears when an admin selects a tender to override the current winning tender and mark a different bid as the winner.
- **Actions:**
  - **Cancel:** Closes the modal without making any changes.
  - **Override:** Confirms the action and sets the selected bid as the winning tender for the lot.



The image shows a modal dialog box with a white background and a thin grey border. At the top, the title 'Confirm Winning Tender Override' is displayed in a dark grey font. Below the title, the question 'Are you sure you want to change the winning tender to?' is shown in a lighter grey font. Underneath, the details 'Contact Name: Chante Eygelaar' and 'Amount: R 10,000.00' are listed. At the bottom right, there are two buttons: a red button with a white 'X' icon and the text 'Cancel', and a teal button with a white padlock icon and the text 'Override'.

Mark as sold Modal:

### Confirm Mark As Sold

An invoice will be generated once this Lot has been marked as sold. Are you sure you want to continue?

Lot Number: 1  
Lot SKU Number:  
Lot Unique Code: PP106703

Amount

Mark as Unsold Modal:

### Confirm Mark As Unsold

Are you sure you want to mark this Lot as unsold?

Lot Number: 1  
Lot SKU Number:  
Lot Unique Code: PP106703

Instructions:

**1. Confirm Mark as Sold Modal**

- **Purpose:** This modal confirms the admin's decision to manually mark a lot as sold.
- **Actions:**
  - **Cancel:** Closes the modal without marking the lot as sold.
  - **Mark as Sold:** Confirms the action and changes the lot's status to "Sold."


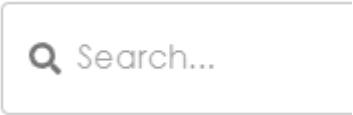
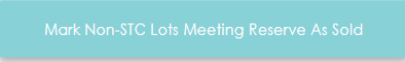


**2. Confirm Mark as Unsold Modal**

- **Purpose:** This modal confirms the admin's decision to manually mark a lot as unsold.
- **Actions:**
  - **Cancel:** Closes the modal without marking the lot as unsold.
  - **Mark as Unsold:** Confirms the action and changes the lot's status to "Unsold."

**Icon**

**Name**

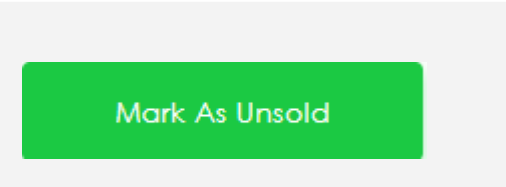
**Description**

 A white rectangular button with rounded corners and a light blue border. The text "AUCTION HISTORY" is centered in a light blue, uppercase font.	Auction History Tab	Displays a historical record of all auctioned lots, including top bidders, bid amounts, and lot statuses.
 A white rectangular search bar with rounded corners and a light gray border. It contains a magnifying glass icon on the left and the text "Search..." in a light gray font.	Search Bar	Enables admins to search for specific lots or bidders within the auction history.
 A teal rectangular button with rounded corners. The text "Mark Non-STC Lots Meeting Reserve As Sold" is centered in a white font.	Mark Non-STC Lots Meeting Reserve as Sold	A bulk action button to mark all non-STC (Subject to Confirmation) lots with met reserves as sold.
 A teal circular button with a white border. Inside the circle is a white refresh icon (a circular arrow).	Refresh Button	Reloads the auction history data to display the latest updates, including new bids or status changes.
 A teal circular button with a white border. Inside the circle is a white PDF document icon.	Download PDF	Downloads the post-auction information in PDF format.



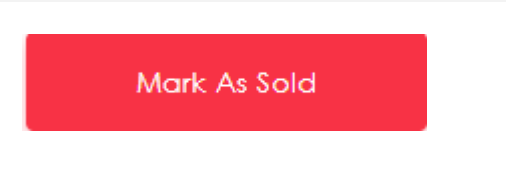
Download CSV

Downloads the post-auction information in CSV format.



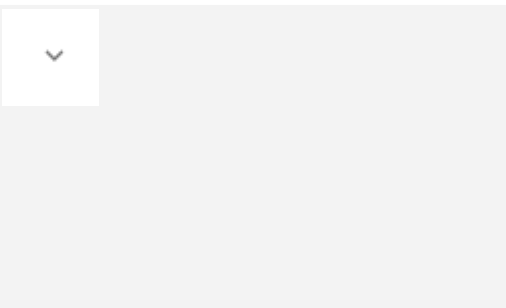
Mark as Unsold Button

Allows an admin to manually mark a lot as unsold if it was not successfully sold in the auction.



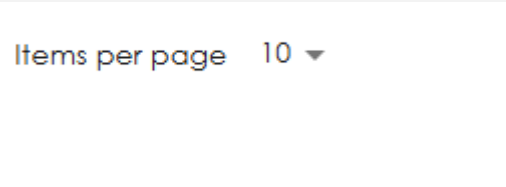
Mark as Sold Button

Allows an admin to manually mark a lot as sold, typically used for confirmed sales after the auction ends.



Expand and Collapse

Expand: Displays additional details or options related to a specific section, lot, or item when clicked. Useful for viewing more information without navigating away from the page.  
Collapse: Hides the expanded details, keeping the interface clean and reducing clutter. Helps streamline the view for better usability.



Items Per Page Selector

Allows the admin to adjust the number of lots displayed per page.



Mark This Bid as the Winning Bid Icon

Allows the admin to manually mark a specific bid as the winning bid for the lot.

# Lots

PremBid 2024.9.14.3 Go to [www.democlient.prembid.com](http://www.democlient.prembid.com)

NAVIGATION MENU

- Auctions
  - Auctions/Create Auction
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- Users
- System Management
- System Documentation

### Lots

Search...

Name	Description	Linked To Auction	Available	Sold	
PB000021	Test Lot	Yes	Yes	No	⌵ ⏪ ⏩ ⏹ ⏺
PB000015	62 Clinton Road ON AUCTION 23 NOVEMBER 2022- CLINTON NETCARE HOSPL...	Yes	Yes	No	⌵ ⏪ ⏩ ⏹ ⏺
PB003652	Pair of The Jungle Book by Rudyard ... A very good first edition pair of The Jungle Books...	Yes	Yes	No	⌵ ⏪ ⏩ ⏹ ⏺
PB003653	The Tale of Peter Rabbit by Beatrix... A first commercial edition of The Tale of Peter Ra...	Yes	Yes	No	⌵ ⏪ ⏩ ⏹ ⏺
PB003654	This Side of Paradise by F. Scott F... A lovely condition UK first edition of F. Scott FL...	Yes	Yes	No	⌵ ⏪ ⏩ ⏹ ⏺

## Lot screen

Lots <span>1</span>							<span>10</span>			
<input type="text" value="Search..."/> <span>2</span>					<span>6</span>	<span>7</span>	<span>9</span>			
Name <span>3</span>	Description <span>4</span>	<span>5</span> Linked To Auction	Available <span>6</span>	Sold <span>7</span>	<span>8</span>					
PB000021	Test Lot	This is a test lot of me capturing a lot on my pho...	<span>Yes</span>	<span>Yes</span>	<span>No</span>	<span>11</span>				
PB000015	62 Clinton Road	ON AUCTION 23 NOVEMBER 2022- CLINTON NETCARE HOSPL...	<span>Yes</span>	<span>Yes</span>	<span>No</span>	<span>12</span>				
PB003652	Pair of The Jungle Book by Rudyard ...	A very good first edition pair of The Jungle Books...	<span>Yes</span>	<span>Yes</span>	<span>No</span>					
PB003653	The Tale of Peter Rabbit by Beatrix...	A first commercial edition of The Tale of Peter Ra...	<span>Yes</span>	<span>Yes</span>	<span>No</span>	<span>13</span>				
PB003654	This Side of Paradise by F. Scott F...	A lovely condition UK first edition of F. Scott F...	<span>Yes</span>	<span>Yes</span>	<span>No</span>	<span>14</span>				
PB000020	UD 100 Lot	Example	<span>Yes</span>	<span>Yes</span>	<span>No</span>	<span>15</span>				
PB000038	2010 Nissan UD60	DESCRIPTION Year: 2010 Make: Nissan Model: UD60 ML...	<span>Yes</span>	<span>Yes</span>	<span>No</span>					

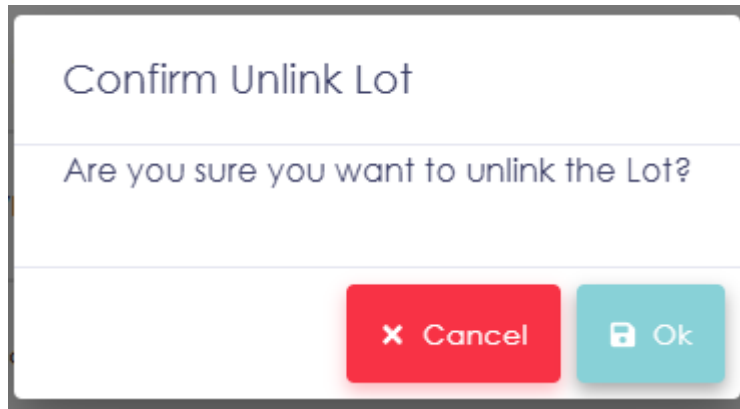
## Instructions:

### **Purpose of the Screen:**

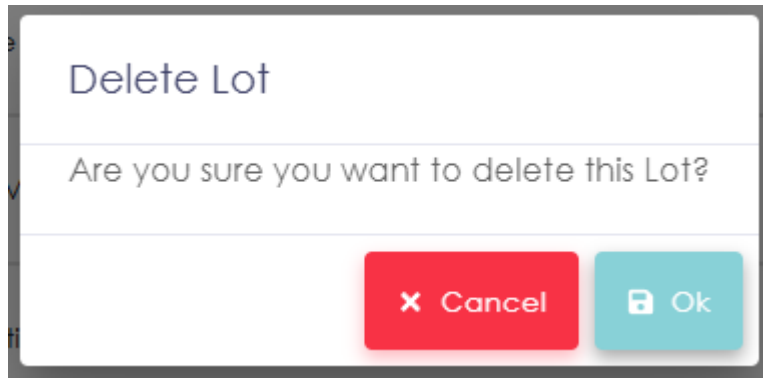
This screen provides a way to view all lots linked to auctions without needing to open each auction individually. It helps in managing and organizing lots efficiently.

1. **Lots Header**
  - Displays the title for the section showing all lots linked to auctions.
2. **Search Bar**
  - Allows users to search for specific lots by name or description.
3. **Name**
  - Displays the lot name or title.
4. **Description**
  - Provides details about the lot, including additional information.
5. **Linked to Auction**
  - Indicates whether the lot is currently linked to an auction (**Yes/No**).
6. **Available**
  - Shows if the lot is available (**Yes/No**).
7. **Sold**
  - Displays if the lot has been sold (**Yes/No**).
8. **Add a Lot**
  - A button to create and add a new lot to the system.
9. **Refresh Button**
  - Updates the lot list to reflect the latest changes.
10. **Filter Button**
  - Allows users to filter and sort lots based on different criteria.
11. **Dropdown Button**
  - Expands to display additional lot details, including custom data.
12. **Edit Auction**
  - Opens the auction associated with the lot for editing.
13. **Unlink the Lot from the Auction**
  - Removes the lot from the linked auction without deleting it.
14. **Edit Lot**
  - Opens a form to modify the details of the selected lot.
15. **Delete Lot**
  - Permanently removes the lot from the system.

Unlink lot confirmation modal



Delete Lot Confirmation modal



## Instructions:

### **Unlink Lot Confirmation Modal**

- **Purpose:** Confirms whether the user wants to unlink a lot from an auction without deleting it.
- **Message:** “Are you sure you want to unlink the Lot?”
- **Buttons:**
  - **Cancel (Red Button):** Stops the action and keeps the lot linked to the auction.
  - **OK (Blue Button):** Confirms the unlinking of the lot.

### **Delete Lot Confirmation Modal**

- **Purpose:** Confirms whether the user wants to permanently delete a lot from the system.
- **Message:** “Are you sure you want to delete this Lot?”
- **Buttons:**
  - **Cancel (Red Button):** Stops the action and keeps the lot in the system.
  - **OK (Blue Button):** Permanently deletes the lot.

Dropdown - As above numbered, number 11.

Lots

Search...

Name	Description	Linked To Auction	Available	Sold						
P8000021	Test Lot	This is a test lot of me capturing a lot on my pho...	Yes	Yes	No	^	↕	✖	↻	🗑
Custom Data — 1		2 — ^								
Make : Ford Other: Runner										
Lot Data — 3		4 — ^								
Lot Type: General STC Status: Yes Registration Deposit (R): 50000 Default Minimum Increment (R): 15000 Buyer's Commission %: 10 Opening Bid (R): 250000 Reserve Price (R): 400000 Guide Price (R): 30000 SKU Number:										

## Instructions:

### **1. Custom Data Section**

- Displays any custom attributes assigned to the lot.
- Example:
- Make: Ford
- Other: Runner

### **2. Collapse Button for Custom Data**






- Clicking this will collapse or expand the Custom Data section.





### **3. Lot Data Section**

- Displays standard lot details such as:
- Lot Type (e.g., General)
- STC Status (Yes/No)
- Registration Deposit (R): 50,000
- Default Minimum Increment (R): 15,000
- Buyer's Commission (%): 10
- Opening Bid (R): 250,000
- Reserve Price (R): 400,000
- Guide Price (R): 300,000
- SKU Number: (if applicable)

### **4. Collapse Button for Lot Data**

- Clicking this will collapse or expand the Lot Data section.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search	Search for any related information to display the Lot you are looking for. Press “Enter” to search. Note: Clear the bar and press enter to revert to displaying all the saved Lot.
	Add a Lot	Click on the icon to add a Lot. Note: There is no need to add Lot from this point.
	Edit Lot	Click to edit a Lot’s details.
	Delete Lot	Click to delete a Lot. Note: Ensure a Lot is not attached to an Auction.
	Edit Auction	Click to edit the Auction that the Lot is linked to.

	Unlink from an Auction	You can unlink a Lot from an Auction.
	Filter button	You can filter the Lots by “Linked” or “Available” Lots.
	Refresh button	Updates the screen to display the most recent data.
	Expand and Collapse	Expands or collapses sections to show or hide details.

# Contact/Agent

PremBid 2024.9.16.3















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NAVIGATION MENU

- Auctions
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- Lots
- Contacts/Agents
- Users
- System Management
- System Documentation

### Contacts/Agents

Search...

First Name	Last Name	Email	Phone Number	
Cameron	Van Der Valk	cameron@randrtechsa.com	0605344096	 
Cameron	Van Der Valk	Cameron@randrtechsa.com	0605344096	 
Candice	Van Staden	candice@nucoauctioneers.com	0825648978	 
Christiaan	Scholtz	christiaan@oldjwauctioneers.com	0827761585	 
Emma-Jayn	Castle	emma.c@premassets.com	0000000000	 
Jayson-Lee	Collins	Jayson@brollauctions.com	0721128186	 
Jessie	Ronnie	info.premproperty@preproperty.com	0725632147	 

## Contact/Agent screen

Contacts/Agents — 1					
Search... 2				7	⌂
First Name — 3	Last Name — 4	Email — 5	Phone Number — 6	8	+
Cameron	Van Der Valk	cameron@randtechsa.com	0605344096	9	⌂
Cameron	Van Der Valk	Cameron@randtechsa.com	0605344096	10	⌂
Candice	Van Staden	candice@nucoauctioneers.com	0825648978		⌂
Christiaan	Scholtz	christiaan@oldjwauctioneers.com	0827761585		⌂
Emma-Jayn	Castle	emma.c@premassets.com	0000000000		⌂
Jayson-Lee	Collins	Jason@brollauctions.com	0721128186		⌂
Jessie	Ronnie	info_premproperty@premproperty.com	0725632147		⌂

## Instructions:

### **Contact/Agent Screen Overview**

This screen allows users to view, search, add, edit, and delete contacts/agents.

#### **1. Contacts/Agent Heading**

- Displays the title of the screen to indicate that it manages contacts/agents.

#### **2. Search Bar**

- Enables users to search for a contact/agent by first name, last name, email, or phone number.

#### **3. First Name**

- Displays the first name of the contact/agent.

#### **4. Last Name**

- Displays the last name of the contact/agent.

#### **5. Email**

- Shows the email address of the contact/agent.

#### **6. Phone Number**

- Displays the contact number of the contact/agent.

#### **7. Refresh Button**

- Refreshes the list to ensure all data is up to date.

#### **8. Add a Contact**






- Allows users to add a new contact/agent.

#### **9. Edit Contact**

- Enables users to edit an existing contact's details.

#### **10. Delete Contact**

- Deletes a contact from the system.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search Bar	Enables users to search for a contact/agent by first name, last name, email, or phone number.
	Refresh button	Refreshes the list to ensure all data is up to date.
	Add a Contact/Agent	Allows users to add a new contact/agent.
	Edit Contact/Agent	Enables users to edit an existing contact's details.
	Delete Contact/Agent	Deletes a contact from the system.

# Users

PremBid 2024.9.14.3

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NAVIGATION MENU

- Auctions
  - Auctions/Create Auction
  - Auction Management
- Lots
- Contacts/Agents
- Users
- System Management
- System Documentation

### Users

ADMIN USERS CLIENT USERS

Search...

Email	Phone Number	Active	Emailed Confirmed	
ALICIA@RANDRTECHSA.CO.ZA	0000000000	<input checked="" type="checkbox"/>	Yes	
ARNO.BRAND.PSAD@OUTLOOK.COM	0728413207	<input checked="" type="checkbox"/>	Yes	
CAMERON@RANDRTECHSA.COM	0605344096	<input checked="" type="checkbox"/>	Yes	
CHANTE_ALIAS_TEST@RANDRTECHSA.CO.ZA	support@randrtechsa.com	<input checked="" type="checkbox"/>	Yes	
DARRYNT.DT@GMAIL.COM	0714732428	<input checked="" type="checkbox"/>	Yes	
EMMA.C@PREMASSETS.COM	0000000000	<input type="checkbox"/>	Yes	

### Important Note

- When logged in as **Profile A**, all other profiles will be visible, but **Profile A will not display in the list** to prevent users from altering **admin access**.
- If logged into **Profile B**, **Profile A will be visible** since it does not have the same restriction.

## Admin user

The screenshot displays a user management interface with the following components and callouts:

- 1**: Users header
- 2**: Search input field
- 3**: CLIENT USERS tab
- 4**: Search input field
- 5**: Email header
- 6**: Phone Number header
- 7**: Active header
- 8**: Emailed Confirmed header
- 8.1**: Emailed Confirmed status (Yes)
- 8.2**: Emailed Confirmed status (No)
- 9**: Refresh button
- 10**: Filter dropdown menu
- 11**: Add user button (+)
- 12**: Edit user button (pencil)
- 13**: Delete user button (trash)

Email	Phone Number	Active	Emailed Confirmed	
ALICIA@BRANDTECHSA.CO.ZA	000000000	<input checked="" type="checkbox"/>	Yes	<b>11</b> + <b>12</b> ✎
ARHO.BRAND.PSAD@OUTLOOK.COM	0725413207	<input checked="" type="checkbox"/>	Yes	✎
CAMERON@BRANDTECHSA.COM	0605344096	<input checked="" type="checkbox"/>	Yes	✎
CHANTE_ALIAS_TEST@BRANDTECHSA.CO.ZA	support@brandtechsa.com	<input checked="" type="checkbox"/>	Yes <b>8.1</b>	✎
CHANTE@BRANDTECHSA.CO.ZA	0842887041	<input checked="" type="checkbox"/>	No <b>8.2</b>	<b>13</b> 🗑️ ✎
DARRYN.T.DT@GMAIL.COM	0714732428	<b>7.1</b> <input checked="" type="checkbox"/>	Yes	✎
EMMA.C@PREMASSETS.COM	000000000	<b>7.2</b> <input type="checkbox"/>	Yes	✎

## Instructions

### **Users Section – Admin Users Tab**

#### **1. Users Heading**

- Displays the title of the section for managing users.

#### **2. Admin Users Tab**

- Displays a list of **Admin** users.

#### **3. Client Users Tab**

- Displays a list of **Client** users (separate from Admin users).

### **Admin Users Tab (Details Below Apply to This Tab Only)**

#### **4. Search Bar**

- Allows searching for admin users by **name, email, or phone number**.

#### **5. Email**

- Displays the email address of each admin user.

#### **6. Phone Number**

- Shows the contact number of each admin user.

#### **7. Active Status**

- Indicates if the admin user is active or inactive.

##### **7.1 Active Toggle**

- Enables or disables the **Active** status for the user.

##### **7.2 Inactive Toggle**

- Switches the user to an **Inactive** status.

#### **8. Emailed Confirmation**

- Indicates if the user has received an email confirmation.

### 8.1 Yes

- User has received the confirmation email.

### 8.2 No

- User has **not** received the confirmation email.

### 9. Refresh Button

- Updates the user list to reflect the latest changes.

### 10. Filter Button

- Opens filter options to refine the list based on criteria like **status, email confirmation, or role**.

### 11. Add an Admin User

- Allows adding a new **Admin** user to the system.

### 12. Edit Admin User

- Enables modifying an **Admin** user's details.

### 13. Send Email Confirmation

- Manually triggers an email confirmation to the selected admin user.

## Adding an Admin User

User Information — 1

First Name \* — 2

Last Name \* — 3

Email Address \* — 4

Phone Number \* — 5

Is Active  — 6

12

13

User Access — 7

**AdminPortalSuperUser**  
A privileged user with the ability to create, manage, and assign roles to other users within the platform. This role has full administrative rights, including overseeing user permissions and access levels. 8

**AdminPortalUser**  
A standard user with access to the platform's core features, excluding the ability to create or manage other users. This role is designed for individuals who need to utilize the system without administrative responsibilities. 9

User Settings — 10

**Allow Bidding**  
A specialized user with permissions to place bids on auctions through the admin portal. This role is focused solely on bidding activities and does not include management or administrative capabilities. 11

## Instructions:

### 1. User Information Header

- Section title for user details.

### 2. First Name

- Input field for the admin user's first name.

### 3. Last Name

- Input field for the admin user's last name.

### 4. Email Address

- Required field for the admin user's email.

### 5. Phone Number

- Input field for the admin user's phone number.

### 6. Is Active Toggle

- Toggle switch to **activate/deactivate** the user.

### 7. User Access Header

- Section title for defining user roles.

### 8. AdminPortalSuperUser

#### Role Description:

- A privileged user with the ability to **create, manage, and assign roles** to other users.
- Has **full administrative rights**, including controlling **permissions and access levels**.

#### Toggle Options:

- **Active** (Enabled)
- **Inactive** (Disabled)

### 9. AdminPortalUser

#### Role Description:

- A **standard user** with access to core platform features.
- **Cannot create or manage other users** but can perform operational tasks.

#### Toggle Options:

- **Active** (Enabled)
- **Inactive** (Disabled)

## 10. User Settings Header

- Section title for additional user settings.

## 11. Allow Bidding

### Role Description:

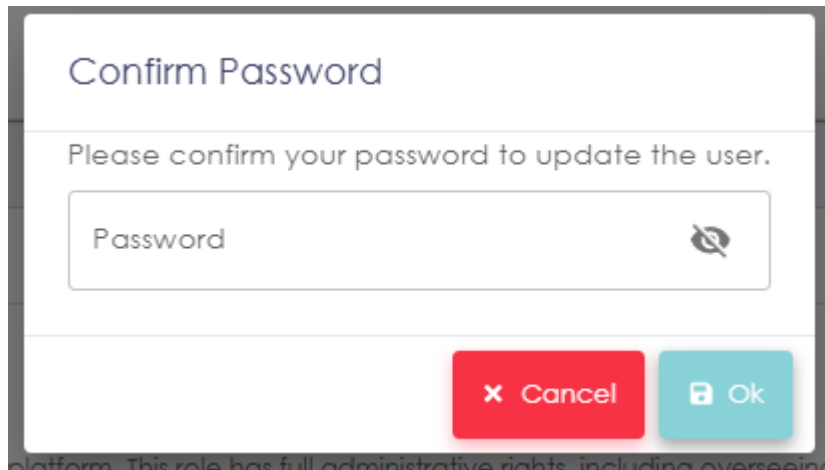
- A **specialized user** with permissions to **place bids on auctions** through the admin portal.
- Focused **only on bidding**—does not include management or administrative privileges.

### Toggle Options:

- **Active** (Enabled)
- **Inactive** (Disabled)

Note: For **User Access (8 and 9)**, at least **one** of these roles (**AdminPortalSuperUser** or **AdminPortalUser**) **must be selected** before completing the admin profile.

Confirmation Modal upon saving the new admin profile



The image shows a confirmation modal dialog box. At the top, the title is "Confirm Password". Below the title, there is a message: "Please confirm your password to update the user." Underneath the message is a text input field containing the word "Password" and a toggle icon (an eye with a slash) to the right. At the bottom of the modal, there are two buttons: a red button with a white "x" icon and the text "Cancel", and a teal button with a white lock icon and the text "Ok".

Instructions:

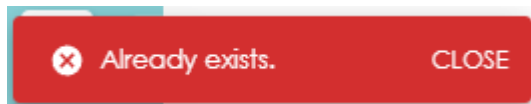
The password confirmation is related to the current logged in admin user's profile password.

Error Message Related to this screen:

At least 1 role has to be selected in order to save the admin user profile

The screenshot shows a web application interface for editing a user profile. At the top, a red error message banner reads "Please fill in all required fields" with a "CLOSE" button. The form contains a "Phone Number" field with the value "0842887041" and an "Is Active" toggle switch that is currently turned on. Below this is a "User Access" section with two roles listed: "AdminPortalSuperUser" (a privileged user with full administrative rights) and "AdminPortalUser" (a standard user with core features access). Both roles have toggle switches that are currently turned off. A red error message at the bottom of the "User Access" section states "At least one user role is required". A teal sidebar on the left contains navigation icons for home, menu, user, users, settings, and help. The top right corner has a "Go to www.democlient.crembid.com" link and a user profile icon.

2. Users with the same details cannot be added



## Client user:

Users

ADMIN USERS CLIENT USERS 1

Q Search... 2

7 8 9

Email 3	Phone Number 4	Active 5	Enrolled Confirmed 6	10
AUCIA@BRANDRTECHSA.CO.ZA	0723791234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10
ARNO.BRAND.PSAD@OUTLOOK.COM	0725413207	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CAMERON@BRANDRTECHSA.COM	0605344096	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CHANTE@BRANDRTECHSA.CO.ZA	0842887041	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 6.1	
DARRYN.TAKKEN@YAHOO.COM	0000000000	<input type="checkbox"/> 5.1	<input type="checkbox"/> 6.2	11
DARRYN.TD@GMAIL.COM	0714732428	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
EMMA.C@PREMASSETS.COM	0000000000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Instructions:

1. **Client Users Tab**
  - A section dedicated to managing client user accounts within the platform.
2. **Search Bar**
  - Allows users to search for a specific client using their email or phone number.
3. **Email**
  - Displays the email address associated with each client user.
4. **Phone Number**
  - Displays the contact number of the client user.
5. **Active**
  - Indicates whether a client user account is active or inactive.
  - 5.1 **Active/Inactive Toggle**
    - Allows switching a client user's status between active and inactive.
6. **Emailed Confirmation**
  - Shows whether an email confirmation has been sent to the client.
  - 6.1 **Yes**
    - Confirmation email has been sent.
  - 6.2 **No**
    - Confirmation email has not been sent.
7. **Refresh Button**
  - Refreshes the client users' data to display the latest updates.
8. **Download Client Users Information in CSV Format**
  - Allows users to download client user data as a CSV file for record-keeping or further processing.
  - **Includes:** Email, phone number, active status, and emailed confirmation status.
  - **Filters Applied:** If filters are set, only filtered results will be downloaded.
9. **Filter Button**
  - Provides options to filter client users based on email confirmation status, active/inactive status, or other criteria.
10. **Dropdown Button**
  - Expands or collapses additional options related to managing client users.
11. **Send Email Confirmation Button**
  - Allows manually sending an email confirmation to selected client users.

Dropdown numbered 10 as above  
Auto approve Registration

Users

ADMIN USERS CLIENT USERS

Search...

Email	Phone Number	Active	Emailed Confirmed
ALICIA@RANDTECHSA.CO.ZA	0723791234	<input checked="" type="checkbox"/>	Yes

Bidding Profiles








Name	Email	Phone Number	Profile Type	Status	Auto Approve Registration
Alicia Bouling	alicia@randtechsa.co.za	0723791234	Individual	Active	<input checked="" type="checkbox"/> 7.1
Alienware Inc ( Jessica Hutchinson )	Test@gmail.com	0725632147	Company	Active	<input type="checkbox"/>
Tarus Distribution ( Frank Castle )	heunisalicia@gmail.com	0723793364	Company	Active	<input type="checkbox"/>
Truckers ( Alicia Heunis (Company) )	heunisalicia@gmail.com	0723793364	Company	Active	<input type="checkbox"/>





## Instructions:

### Dropdown - Bidding Profiles Registered to the Account (Numbered 10)

This dropdown expands to display all bidding profiles linked to a specific client user.

1. **Expand and Collapse**
  - Allows users to expand or collapse the list of bidding profiles associated with the client account.
2. **Name**
  - Displays the name of the bidding profile linked to the client user.
3. **Email**
  - Shows the email address associated with the bidding profile.
4. **Phone Number**
  - Displays the contact number linked to the bidding profile.
5. **Profile Type**
  - Indicates the type of bidding profile (e.g., Individual, Business, or other classifications).
6. **Status (Active/Inactive)**
  - Displays whether the bidding profile is active or inactive.
7. **Auto-Approve Registration**
  - Determines if new registrations under this profile are automatically approved.
- **7.1 True/False Toggle**
  - Enables or disables auto-approval for registrations.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Admin Users Tab	A section dedicated to managing admin user accounts within the platform
	Search Bar	Allows users to search for specific admin profiles using keywords like name, email, or phone number.
	Profile: Active and Inactive toggle	Enables users to activate or deactivate an admin profile.
	Resend profile confirmation email	Sends a confirmation email again to the admin user for verification.
	Edit admin profile	Opens the admin profile for editing, allowing changes to user details and permissions.
	Add an Admin profile	Provides an option to create a new admin user with the required details and access levels.
	Refresh button	Reloads the list of admin/client users to reflect the latest updates.

	Filter Icon	Opens filter options to refine the list of admin/client users based on specific criteria.
	Client Users Tab	A section dedicated to managing client user accounts within the platform
	Collapse and Expand	Allows users to expand or collapse the details of each client user.
	Profile: Active and Inactive toggle/ Auto approve registration active and inactive toggle	<p><b>Profile: Active and Inactive Toggle</b> – Toggles the client profile between active and inactive status.</p> <p><b>Auto-Approve Registration (Active/Inactive Toggle)</b> – Controls whether new registrations under this client profile are automatically approved.</p>

## How to Add an Admin User

1. **Navigate to the "Admin Users" Tab**
  - Log in to the system.
  - Click on the **"Users"** section in the menu.
  - Select the **"Admin Users"** tab.
2. **Click on "Add an Admin Profile"**

Locate the **"Add an Admin User"** button.

  - Click to open the admin user creation form.
3. **Enter User Information**
  - Fill in the following details:
    - First Name
    - Last Name
    - Email Address
    - Phone Number
  - Toggle the **"Is Active"** switch if the user should be active.
4. **Select at Least One User Access Role (Mandatory Step)**
  - Choose between:
    - **AdminPortalSuperUser** – Full admin rights, can manage other users.
    - **AdminPortalUser** – Standard user access without user management rights.
  - At least **one** of these roles **must** be selected to proceed.
5. **(Optional) Enable "Allow Bidding"**
  - If this admin should be allowed to place bids, toggle **"Allow Bidding"** to **Active**.
6. **Save the Admin Profile**
  - Click the **"Save"** or **"Confirm"** button.
  - A confirmation message should appear, indicating that the admin user has been successfully created.

## **How to Mark a Client User's Bidding Profile as Auto-Approved on Registration**

1. **Navigate to the "Client Users" Tab**
  - Log in and go to the **"Users"** section.
  - Select the **"Client Users"** tab.
2. **Search for the Client User**
  - Use the **Search Bar** to find the client by email or phone number.
3. **Expand the Bidding Profiles Section**
  - Click the **Expand/Collapse** button next to the client's name to view their bidding profiles.
4. **Locate the "Auto-Approve Registration" Toggle**
  - Under the bidding profile details, find the **"Auto-Approve Registration"** option.
5. **Enable Auto-Approval**
  - Toggle the switch to **"Active" (True)** to automatically approve future registrations for this bidding profile.
6. **Save Changes**
  - Confirm and save the updated settings.
  - A success message should confirm the change.

# SYSTEM MANAGEMENT

## Lot Types

The screenshot displays the 'Lot Types' management page in the PremBid system. The interface includes a teal navigation sidebar on the left and a main content area on the right. The main area features a search bar, a table of lot types, and a 'Custom Data' section. Numbered callouts (1-10) identify specific UI components:

- 1: Lot Types header
- 2: Search input field
- 3: Name column header
- 4: Description column header
- 5: Filter icon (checkmark)
- 6: Add icon (+)
- 7: Edit icon (pencil)
- 8: Refresh icon (circular arrow)
- 9: Delete icon (trash)
- 10: Confirmation dialog (red box)

Name	Description	Filter	Add	Edit	Delete
Building		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Data					
Roofing		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gold		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diamonds		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coltan		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copper		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cobalt		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Instructions:

1. **Lot Types Header**
  - Displays the title "Lot Types" to indicate the section where users can manage different lot types.
2. **Search Bar**
  - Allows users to search for a specific lot type by name or description for quick access.
3. **Name**
  - The title or label of the lot type, used to identify different categories of lots.
4. **Description**
  - A brief explanation of the lot type, detailing its purpose or usage.
5. **Expand and Collapse Arrow**
  - Clicking this arrow will display or hide additional custom data related to the lot type.
6. **Expand and Collapse Custom Data**
  - When expanded, it reveals customizable fields associated with the selected lot type.
7. **Add a Lot Type**
  - A button that allows users to create a new lot type by entering a name, description, and custom data.
8. **Refresh Button**
  - Reloads the lot types list to ensure the latest changes or newly added lot types are visible.
9. **Edit Lot Type**
  - Allows users to modify an existing lot type's name, description, or custom data.
10. **Delete Lot Type**
  - Removes a lot type from the system. A confirmation prompt may appear before deletion.

**Adding a lot type**

The image shows a form titled "Adding a lot type" with two main sections: "Lot Type Information" and "Custom Lot Type Information".

- Section 1: Lot Type Information**
  - 1: Section header "Lot Type Information"
  - 2: "Name\*" text input field
  - 3: "Description" text input field
- Section 2: Custom Lot Type Information**
  - 4: Section header "Custom Lot Type Information"
  - 5: "Field" text input field
  - 6: "Field\*" text input field
  - 7: "+" button
  - 8: "- + -" buttons
  - 9: "- + -" buttons
  - 10: "-" button
  - 11: "+" button
  - 12: "-" button

## Instructions:

### **1. Lot Type Information Header**

- Displays the section title where users input details to create a new lot type.

### **2. Name**

- The title or identifier for the new lot type.

### **3. Description**

- A brief summary explaining the purpose or characteristics of the lot type.

### **4. Custom Lot Type Data**

- A section where users can define additional attributes specific to the lot type.

### **5. Fields**

- The customizable data points associated with the lot type.

### **6. Field Text Box**

- The input area where users enter values for each field.

### **7. Add a Field**

- A button that allows users to create a new custom data field.

### **8. Reorder Down Arrow**

- Moves a field down in the list to adjust its order.

### **9. Reorder Up Arrow**

- Moves a field up in the list to adjust its order.

### **10. Delete Field**

- Removes a specific field from the lot type.

### **11. Save**

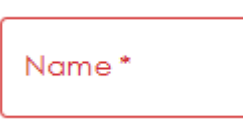
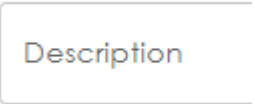
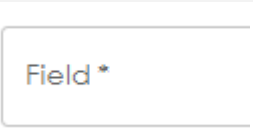



- Confirms and applies the changes, saving the new lot type.




### **12. Back**

- Cancels the process and discards any unsaved changes.

## **Steps to Add a Lot Type**

1. **Lot Type Information Screen** – The "Lot Type Information" screen displays the necessary fields for adding a new lot type.
2. **Enter Lot Type Name** – Fill in the **Name** field to define the lot type. This is a required field.
3. **Enter Description (Optional)** – Provide a brief **Description** of the lot type. This step is optional.
4. **Custom Lot Type Data (Optional)** – The **Custom Lot Type Data** section allows you to add additional attributes related to the lot type. This is not mandatory.
5. **Add Fields** – Enter a **Field Name** and its **Default Related Information**. Both fields support alphanumeric text.
6. **Add More Fields** – Click the **"Add a Field"** button to create additional custom data fields.
7. **Reorder Fields** – Use the **Reorder Up Arrow** and **Reorder Down Arrow** to adjust the order of the fields.
8. **Delete Fields** – Click the **"Delete Field"** button to remove a specific field if needed.
9. **Save the Lot Type** – Click the **"Save"** button to confirm and store the new lot type.
10. **Discard Changes** – If you do not want to save the changes, click the **"Discard"** button to cancel the process.
11. **Exit to Previous Screen** – Clicking the **"Back"** button will redirect you to the **Document Template** screen.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Name	The title or identifier of the lot type, used to distinguish different categories.
	Description	A brief explanation of the lot type, detailing its purpose or characteristics. This field is optional.
	Field	Represents a specific data attribute associated with the lot type. Fields can contain alphanumeric values.
	Add a field	Allows users to create additional fields for capturing custom data related to the lot type.
	Reorder down	Moves a field one position down in the list to adjust its order.
	Reorder up	Moves a field one position up in the list to adjust its order.

	Delete field	Removes a selected field from the lot type configuration.
	Save	Confirms and stores the lot type, along with any added or modified fields.
	Back	Redirects the user to the <b>Document Template</b> screen without saving changes.

# Document Templates

The screenshot displays the PremBid system interface. On the left is a teal navigation menu with the following items: PremBid 2024.7.14.3, NAVIGATION MENU, Auctions (with sub-items: Auctions/Create Auction, Auction Management), Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues, Integration), and System Documentation. The main content area is titled 'Documents' (1) and features a search bar (2) with a search icon and a refresh icon (10). Below the search bar is a table with columns 'Name' (3) and 'Description' (4). The table contains several rows, each with a 'Bidders Pack' (5) column and a 'Custom Data' (6) column. The 'Custom Data' column shows 'Lot: Applied' (green), 'Access Denied' (green), 'Auction: N/A', 'CompanyProfile: N/A', and 'IndividualProfile: N/A'. Below the table are several rows, each with a 'Bill Info' (7) column and a 'Directors ID's' (8) column. The 'Bill Info' and 'Directors ID's' columns contain dropdown menus and status indicators (green and red buttons). The 'Drawings' row has a dropdown menu and status indicators. The 'Form To Tender' row has a dropdown menu and status indicators. The 'Identify Document' row has a dropdown menu and status indicators. The 'Marriage Certificate' row has a dropdown menu and status indicators. In the top right corner, there is a link 'Go to www.demolentprembid.com' and a user profile icon (5).

## Instructions:

1. **Documents Header**
  - Displays the title "Documents" to indicate the section where users can manage documents.
2. **Search Bar**
  - Allows users to search for a specific document by name or description for quick access.
3. **Name**
  - The title or identifier of the document.
4. **Description**
  - A brief explanation of the document's purpose or contents.
5. **Expand and Collapse – Displays Custom Data**
  - Clicking this will show or hide additional custom data related to the document.
6. **Expand and Collapse Custom Data**
  - Expands or collapses the section that contains detailed custom fields for the document.
7. **Edit Document**
  - Allows users to modify an existing document's name, description, or custom data.
8. **Delete Document**
  - Removes a document from the system. A confirmation prompt may appear before deletion.
9. **Add a Document**
  - A button that allows users to create a new document by entering relevant details.
10. **Refresh Button**
  - Reloads the document list to ensure the latest changes or newly added documents are visible.

## Adding a document

The image shows a form for adding a document with the following elements:

- 1**: Document Information header
- 2**: Name\* (required text input field)
- 3**: Description (text input field)
- 4**: Document Type (dropdown menu)
- 5**: Apply To Document Type (checkbox)
- 6**: Access Controlled (checkbox)
- 7**: Upload Required (checkbox)
- 8**: Acceptance Required (checkbox)
- 9**: Registration Document (checkbox)
- 10**: Lot (checkbox)
- 11**: Individual Profile (checkbox)
- 12**: Company Profile (checkbox)
- 13**: Auction (checkbox)
- 14**: Save button (teal)
- 15**: Cancel button (red)

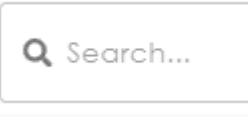






Document Type	Apply To Document Type	Access Controlled	Upload Required	Acceptance Required	Registration Document
Lot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individual Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

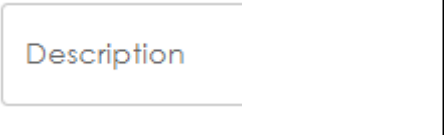
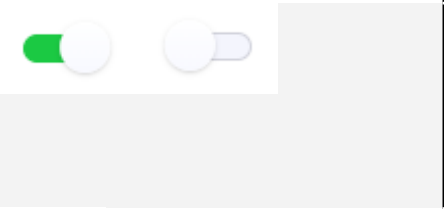

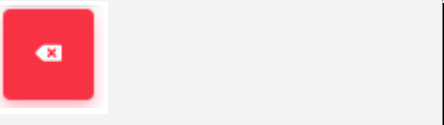
## Instructions:

1. **Document Information**
  - Displays the section title where users can enter details about the document.
2. **Name**
  - The title or identifier for the document. This is a required field.
3. **Description**
  - A brief explanation of the document's purpose. This field is optional.
4. **Document Type**
  - Defines the category of the document (e.g., Lot, Profile, Auction).
5. **Apply to Document Type**
  - A toggle switch that determines whether the document applies to a specific type.
6. **Access Controlled**
  - Enables or restricts access to the document based on user permissions.
7. **Upload Required**
  - Specifies whether uploading a file is mandatory for this document.
8. **Acceptance Required**
  - Determines if the document needs to be accepted by users before proceeding.
9. **Registration Document**
  - Indicates if the document is required for registration purposes.
10. **Lot**
  - A toggle option to apply this document to lots.
11. **Individual Profile**
  - A toggle option to apply this document to individual user profiles.
12. **Company Profile**
  - A toggle option to apply this document to company profiles.
13. **Auction**
  - A toggle option to apply this document to auctions.
14. **Save Button**
  - Saves the document and its configurations.
- **Cancel Button**
  - Discards any changes and returns to the previous screen

## **Steps to Add a Document**

1. Navigate to the "**Document Templates**" screen to view all available document templates.
2. Use the **Search Bar** to find a specific document template or scroll through the list manually.
3. Click the **Drop-Down Arrow** to expand and view details for a selected document template.
4. To modify an existing document, click the **Edit Button**.
5. To remove a document template, click the **Delete Button** (a confirmation prompt may appear).
6. To create a new document template, click the **Add Button**. This redirects to the "**Adding a Document**" screen.
7. On the "**Adding a Document**" screen:
  - Enter a **Name** (mandatory).
  - Provide a **Description** (optional).
  - Select a **Document Type** from the available options.
  - Toggle **Apply to Document Type** if applicable.
  - Set additional options like **Access Controlled, Upload Required, Acceptance Required**, and **Registration Document** as needed.
  - Enable toggles for **Lot, Individual Profile, Company Profile, or Auction**, depending on where the document should be applied.
8. Click **Save** to finalize and store the document.
9. Click **Cancel** if you wish to discard changes and return to the previous screen.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search bar	Allows users to search for a specific document template. Note: Clear the bar and press enter to revert to displaying all the document templates.
	Add a Document Template	Click to create a new document template. Redirects to the “Adding a Document” screen.
	Refresh button	Refreshes the document list to show the latest updates.
	Edit Document Template	Opens the selected document template for modifications.
	Delete Document Template	Permanently removes a selected document template. A confirmation prompt may appear before deletion.
	Collapse and Expand arrow	Toggles the visibility of additional document details or custom data.
	Document name	Displays the name of the document template.

	Document description	Provides a brief explanation or details about the document template.
	Active/ Inactive toggle	Enables or disables the document template. <ul style="list-style-type: none"> <li>• <b>Active:</b> The document is available for use.</li> <li>• <b>Inactive:</b> The document is hidden and cannot be selected.</li> </ul>
	Save	Saves any changes made to the document template.
	Back	Returns to the previous screen without saving changes.

# Increment Table

The screenshot displays the 'Increment Tables' page in the PremBid application. The left sidebar contains a navigation menu with the following items: Auctions, Lots, Contacts/Agents, Users, System Management, and System Documentation. The main content area features a search bar, a table with columns 'Name' and 'Description', and a 'Custom Data' section. The table contains one entry: 'Demo Increment Table' with the description 'This an example of how our incremen...'. The 'Custom Data' section lists four items: '1) From Amount: 0 To Amount: 50000 Increment: 2000', '2) From Amount: 50001 To Amount: 75000 Increment: 5000', '3) From Amount: 75001 To Amount: 100000 Increment: 7500', and '4) From Amount: 100001 To Amount: 200000 Increment: 10000'. The page footer shows 'Items per page: 10' and '1-1 of 1'. Numbered callouts (1-10) highlight the following elements: 1) 'Increment Tables' header, 2) Search bar, 3) 'Name' column header, 4) 'Description' column header, 5) Add button (+), 6) Edit button (pencil), 7) Delete button (trash), 8) Refresh button (circular arrow), 9) Custom Data section header, and 10) A red button (stop sign).

## Instructions:

- 1. Increment Table Header**
  - Displays the title of the section, indicating that it contains all increment tables.
- 2. Search Bar**
  - Allows users to search for a specific increment table.
- 3. Name**
  - Displays the name of the increment table.
- 4. Description**
  - Provides additional information or context about the increment table.
- 5. Add an Increment Table**
  - Click to create a new increment table. Redirects to the "Adding an Increment Table" screen.
- 6. Expand and Collapse Arrow**
  - Toggles the visibility of additional custom data for the increment table.
- 7. Expand and Collapse Custom Data**
  - Displays or hides custom data associated with the increment table.
- 8. Refresh Button**
  - Refreshes the list to show the latest updates to the increment tables.
- 9. Edit Increment Table**
  - Opens the selected increment table for modifications.
- 10. Delete Increment Table**
  - Permanently removes a selected increment table. A confirmation prompt may appear before deletion.

## Adding an increment table

**Increment Table** — 1

Name\* — 2  
Demo Increment Table

Description — 3  
This is an example of how our increment table works

**Increment Breakdown** — 4  
The increments below will be applied to each lot where this increment table is selected.

Please ensure that you read the below:

- At least one entry must be added for this increment table.
- The 'To Amount' must be greater than the 'From Amount'.
- All issues will be highlighted, per entry, in red.
- The last entry will be used as the final increment for each lot.

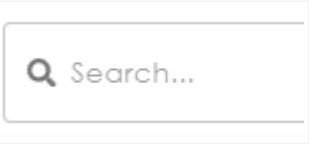








From Amount	To Amount	Increment	
R 0,00	To Amount* — 6 R 50,000.00 — 6.1	Increment* — 7 R 2,000.00 — 7.1	8 + 9 -
R 50,001.00	To Amount* R 75,000.00	Increment* R 5,000.00	9 -
R 75,001.00	To Amount* R 100,000.00	Increment* R 7,500.00	-
R 100,001.00	To Amount* R 200,000.00	Increment* R 10,000.00	-

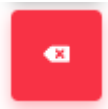
## Instructions:

1. **Increment Table Header**
  - The main title of the page indicates that you are adding a new increment table.
2. **Name**
  - The field where you enter the name of the increment table. This should be a unique identifier for the table.
3. **Description**
  - A text field where you can provide additional details about the increment table (optional).
4. **Increment Breakdown**
  - A section displaying the increment structure applied to bids within specific value ranges.
5. **From Amount**
  - The starting value of a specific increment range.
6. **To Amount**
  - The ending value of a specific increment range.
  - **6.1 To Amount Text Box** – Input field where you specify the maximum amount for that range.
7. **Increment**
  - The step value by which bids will increase within the defined range.
  - **7.1 Increment Text Box** - Input field where you enter the bid increment value.
8. **Add an Increment**
  - A button to add a new increment range to the table.
9. **Delete Increment**
  - A button to remove an existing increment range.
10. **Save**
  - Saves the increment table after all required details are filled in.
11. **Back**
  - Navigates back to the previous screen without saving changes.

## User Steps to Add an Increment Table

1. Navigate to the "**Increment Tables**" section under **System Management**.
2. Click on the "**Add an Increment Table**" button to open the increment table creation screen.
3. The "**Increment Table Information**" screen will display.
4. Enter a **Name** for the increment table.
5. Optionally, enter a **Description** to explain how the table will be used.
6. Under **Increment Breakdown**, define the increment ranges by:
  - Entering a **From Amount** (starting value for a range).
  - Entering a **To Amount** (ending value for that range).
  - Inputting an **Increment** value (the bid step within that range).
7. Click the **"+" (Add an Increment)** button to add more ranges if needed.
8. If an increment needs to be removed, click the **red trash can icon (Delete Increment)** next to the entry.
9. Once all increments are set, click the **"Save"** button to finalize the table.
10. To cancel or exit without saving, click the **"Back"** button to return to the Increment Tables screen.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search bar	Allows users to search for specific increment tables
	Refresh button	Updates the list of increment tables to reflect any recent changes.
	Add and increment table / Increment	Button to create a new increment table or add a new increment range within a table.
	Edit increment table	Allows users to modify an existing increment table.
	Delete increment table / Increment	Removes an increment table or a specific increment range.
	Expand and collapse	Expands to display custom data or collapses to hide details.
	To Amount text box	Input field for defining the upper limit of a bid increment range.
	Increment amount text box	Input field for specifying the bid step within a defined range.
	Save	Saves the increment table after all required details are filled in.



Back

Navigates back to the previous screen without saving changes.

# Bank Details

The screenshot displays the PremBid application interface. On the left is a teal navigation menu with the following items: PremBid 2024.9.14.3, NAVIGATION MENU, Auctions (with sub-items: Auctions/Create Auction, Auction Management), Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues, Integration), and System Documentation. The main content area is titled "Bank Details" (1) and features a search bar (2) with a search icon and a refresh button (6). Below the search bar is a table with columns "Name" (3) and "Description" (4). The table contains two rows: "Demo RIB Account" with description "This is a dummy account for demo's" and "Cameron Demo". Each row has a plus button (5) and a set of edit (7) and delete (8) buttons. At the bottom right of the table, there is a pagination control showing "Items per page 10" and "1-2 of 2".

## Instructions:

1. **Bank Details Header**
  - Displays the title “Bank Details” at the top of the section, indicating that this area contains stored banking information.
2. **Search Bar**
  - Allows users to search for specific bank details by name or description.
3. **Name**
  - Represents the name assigned to a specific bank detail entry (e.g., "Company Account" or "Escrow Account").
4. **Description**
  - Provides additional details or notes about the bank account, such as its purpose or usage.
5. **Add Banking Details**
  - A button that opens a form to input new bank details, including account number, bank name, branch, and other relevant information.
6. **Refresh Button**
  - Reloads the bank details list to reflect any recent changes or updates.
7. **Edit Banking Details**
  - Allows users to modify an existing bank detail entry. Clicking this option opens an edit form.
8. **Delete Banking Details**
  - Permanently removes a selected bank detail entry after confirmation.

## Adding banking details

Bank Details

Name \* — ①

Description — ②

Bank Name \* — ③

Account Number \* — ④

Branch Code \* — ⑤

Branch Name \* — ⑥

SWIFT Code — ⑦

⑧







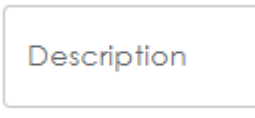
⑨


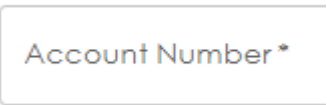
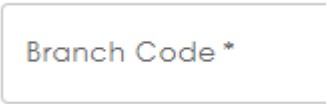
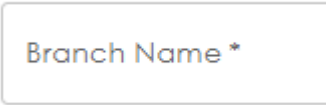



## Instructions:

1. **Name\***
  - A required field where users enter a name for the banking details (e.g., "Company Account").
2. **Description**
  - An optional field for adding additional notes or details about the bank account.
3. **Bank Name\***
  - A required field where users input the official name of the bank (e.g., "ABC Bank").
4. **Account Number\***
  - A required field for entering the bank account number.
5. **Branch Code\***
  - A required field where users enter the branch code associated with the bank account.
6. **Branch Name\***
  - A required field for entering the name of the bank branch.
7. **SWIFT Code**
  - An optional field for entering the bank's SWIFT code (used for international transactions).
8. **Save Button**
  - Saves the entered bank details.
9. **Discard Button**
  - Cancels the entry and discards any unsaved changes.

## User Steps for Adding Banking Details

1. **Navigate to the Banking Details Section**
  - Go to the "Bank Details" menu.
  - Click on the "**Add Banking Details**" button.
2. **Enter Required Information**
  - In the **Name** field, type a unique name for the banking details (e.g., "Company Account").
  - (Optional) In the **Description** field, enter any additional notes.
  - In the **Bank Name** field, input the official bank name.
  - In the **Account Number** field, enter the bank account number.
  - In the **Branch Code** field, provide the associated branch code.
  - In the **Branch Name** field, enter the bank's branch name.
  - (Optional) In the **SWIFT Code** field, enter the SWIFT code if needed for international transactions.
3. **Save or Discard Changes**
  - Click the **Save** button to store the banking details.
  - If you do not want to save the details, click the **Discard** button to cancel the entry.
4. **Confirmation**
  - If saved successfully, the new bank details will appear in the list.
  - If discarded, no changes will be made.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search bar	Allows users to search for specific increment tables
	Refresh button	Reloads the list of banking details to reflect the most recent updates or changes.
	Add banking details	A button that opens a form where users can enter new bank details.
	Edit banking details	Allows users to modify an existing bank detail entry. Clicking this opens an editable form where users can update the information.
	Delete banking details	Permanently removes a selected bank detail entry. A confirmation prompt appears before deletion.
	Name	A required field where users enter a unique name for the banking details (e.g., "Company Account" or "Escrow Account").
	Description	An optional field for adding additional information about the banking details, such as its purpose or restrictions.

	Bank name	A required field where users enter the official name of the bank associated with the account.
	Account number	A required field for entering the unique number assigned to the bank account.
	Branch code	A required field where users enter the numerical code that identifies the specific bank branch.
	Branch Name	A required field where users enter the name of the bank branch associated with the account.
	SWIFT code	An optional field where users enter the SWIFT (Society for Worldwide Interbank Financial Telecommunication) code, used for international transactions.
	Save	Saves the banking details once all required fields are completed.
	Back	Returns to the previous screen or cancels the action without saving any changes.

## Bidding Calculations

PremBid 2024.9.14.3

Go to [www.demodemo.prembid.com](http://www.demodemo.prembid.com)

NAVIGATION MENU

- Auctions
  - Auctions/Creates Auction
  - Auction Management
- Lots
- Contacts/Agents
- Users
- System Management
  - Lot Types
  - Documents
  - Increment Tables
  - Bank Details
  - Bidding Calculations**
  - Venues
  - Integration
- System Documentation

Bidding Calculations

Search...

Name	Description	
Demo of Default Bidding Calcs		[Refresh] [Add]
Minerals Demo		[Edit] [Delete]
Vehicle		[Edit] [Delete]

Items per page 10 1-3 of 3

## Instructions:

1. **Bidding Calculations Header**
  - Displays the section title to indicate that users are managing bidding-related calculations.
2. **Search Bar**
  - Allows users to search for specific bidding calculations by entering keywords such as Name or Description. The list dynamically filters results based on the input.
3. **Name**
  - A required field where users specify the name of the bidding calculation (e.g., "Incremental Bidding" or "Fixed Step Bidding").
4. **Description**
  - An optional field where users provide additional details about the bidding calculation, such as its rules, conditions, or usage scenarios.
5. **Refresh Button**
  - Reloads the bidding calculations list to display the most recent updates or changes.
6. **Add a Bidding Calculation**
  - A button that opens a form for users to create a new bidding calculation by entering necessary details.
7. **Edit Bidding Calculation**
  - Allows users to modify an existing bidding calculation entry. Clicking this opens an editable form where users can update information.
8. **Delete Bidding Calculation**
  - Permanently removes a selected bidding calculation entry. A confirmation prompt appears before deletion.

## Adding a bidding calculation - Part 1

Bidding Calculations — 1

These calculations determine the invoice totals and are used for invoicing. They will be displayed to bidders to inform them of their liabilities during bidding.

Please ensure all related fees, commissions, and taxes are included as invoices are automatically generated. These calculations are used **PER LOT**.  
Order: Enter the calculations in the order of their execution.

Name \* — 2

Description — 3

Example Costs — 4

The values entered below will be replaced using the actual values configured or submitted for a lot and are simply used for demonstration purposes of the calculations.

Description — 5	Type — 6	Amount — 7	Calculated From — 8	Summary (Cumulative Total) — 9
Bid Amount	Numeric Value	R 0.00 — 7.1	N/A	R 0.00
Buyers Commission	Percentage	% 0.00 — 7.2	Bid Amount	R 0.00

10

11

## Instructions:

### 1. **Bidding Calculations Header**

- Displays the title of the section, indicating that users are managing bidding-related calculations.

### 2. **Name**

- A required field where users specify the name of the bidding calculation (e.g., "Incremental Bidding" or "Fixed Step Bidding").

### 3. **Description**

- An optional field where users can provide additional details about the bidding calculation, such as its purpose or conditions.

### 4. **Example Costs Header**

- Indicates that the following section contains example cost calculations for demonstration purposes. The values entered here will be replaced by actual values during bidding and invoicing.

### 5. **Description**

- A label for each cost item (e.g., "Bid Amount," "Buyer's Commission"), explaining what the cost represents.

### 6. **Type**

- Specifies the type of value used in the calculation, such as a **numeric value** (fixed amount) or **percentage** (calculated from another value).

### 7. **Amount**

- Displays the numerical value assigned to each cost item.
- **7.1 Bid Amount** – The base amount a bidder places on a lot.
- **7.2 Buyer's Commission** – A percentage-based commission applied to the bid amount.

### 8. **Calculated From**

- Specifies the reference point for the calculation (e.g., "Bid Amount" for percentage-based fees).

### 9. **Summary (Cumulative Total)**

- Displays the total calculated value, showing how the cost components add up.

### 10. **Save Button**

- Saves the bidding calculation with all entered details.

### 11. **Delete Button**

- Permanently removes the bidding calculation. A confirmation prompt appears before deletion.

## Adding a bidding calculation - Part 2

**Additional Costs** 12

The calculations below will be applied to each lot where this bidding calculation is selected.

Description	Type	Amount	Calculated From	Summary (Cumulative Total)
	Percentage <span>14.1</span>	% 0.00	Cumulative Total	R 0.00 <span>18</span>
	Percentage <span>14.2</span>	% 0.00	Cumulative Total <span>16.1</span>	R 0.00 <span>19</span>
			Bid Amount <span>16.2</span>	
			Cumulative Total	

Add VAT  22

VAT will be applicable on all items above and added to the cumulative total of all costs configured for the Lot.

Description	Type	Amount	Calculated From	Calculated Value
VAT	Percentage	% 15.00	Cumulative Total	R 0.00

**Example Total** 28 — R 0.00

## Instructions:

### **12. Additional Costs Header**

- Indicates that the following section applies additional costs to the bid calculation.

### **13. Description**

- A text field to describe the additional cost.

### **14. Type**

- Defines how the cost is calculated. It can be:
  - **14.1 Percentage** – The cost is a percentage of the base amount.
  - **14.2 Numeric Value** – A fixed value is added.

### **15. Amount**

- Input field for entering the percentage or numeric value.

### **16. Calculated From**

- Determines the base for the calculation:
  - **16.1 Cumulative Total** – The cost is calculated from the running total.
  - **16.2 Bid Amount** – The cost is calculated based on the initial bid amount.

### **17. Summary (Cumulative Total)**

- Displays the updated total after additional costs are applied.

### **18. Move Down Arrow**

- Adjusts the order of cost calculations (moves an item down).

### **19. Move Up Arrow**

- Adjusts the order of cost calculations (moves an item up).

### **20. Add Additional Cost Button (+)**

- Adds a new row for an additional cost entry.

### **21. Delete Button**

- Removes the additional cost entry.

### **22. Add VAT Toggle**

- Enables or disables VAT application to the cumulative total.

### **23. Description**

- Displays "VAT" as the label for this cost.

**24. Type**

- Defines VAT calculation type (usually Percentage).

**25. Amount**

- Input field for VAT percentage.

**26. Calculated From**

- VAT is applied to the cumulative total.

**27. Calculated Value**

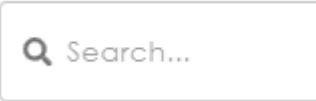





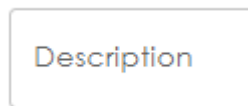
- Displays the VAT amount based on the cumulative total.

**28. Example Total**

- Displays the final total after all additional costs and VAT are applied.

## **Steps to Add a Bidding Calculation**

1. Navigate to the "Bidding Calculations" section in the system.
2. Click on the "Add New Calculation" button.
3. Enter a **Name** for the calculation (required).
4. Optionally, enter a **Description** to clarify the purpose of this calculation.
5. In the "Example Costs" section, define different cost components:
  - Provide a **Description** for each cost item (e.g., Buyer's Commission).
  - Select the **Type** (Percentage or Numeric Value).
  - Enter the **Amount** (percentage or fixed value).
  - Choose **Calculated From** to determine the cost basis.
6. In the "Additional Costs" section, add any extra fees:
  - Click the "Add Additional Cost" button.
  - Enter the **Description**, select the **Type**, and define the **Amount**.
  - Adjust the order of cost calculations using the **Move Up/Down** arrows.
7. Enable or disable VAT using the "Add VAT" toggle. If enabled:
  - VAT will be applied to all defined costs.
  - The VAT amount will be displayed in the "Calculated Value" field.
8. Review the **Example Total** to verify calculations.
9. Click **Save** to finalize the bidding calculation.
10. If needed, use the **Delete** button to remove the calculation.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search Bar	Allows users to search for existing bidding calculations by name or description to quickly find relevant entries.
	Refresh button	Reloads the bidding calculation list to display the most up-to-date data after changes have been made.
	Add a bidding calculation/ Add additional costs	Enables users to create a new bidding calculation or add extra cost components. Users can define cost types, amounts, and conditions.
	Edit bidding calculation	Opens an existing bidding calculation for modification. Users can update names, descriptions, values, and calculation methods.
	Delete bidding calculation/ Delete additional costs	Permanently removes a bidding calculation or additional cost.
	Name	A required field where users specify the name of the bidding calculation (e.g., "Incremental Bidding" or "Fixed Step Bidding").
	Description	An optional field where users can provide additional details about the bidding calculation, such as its purpose or conditions.

<input type="text" value="R 0.00"/>	Bid Amount in Rands	The base amount a bidder places on a lot. This amount serves as the foundation for any additional costs or commissions.
<input type="text" value="% 0.00"/>	Buyers Commission in %	A percentage-based fee applied to the bid amount, typically charged by the auction house as a service fee.
Add VAT <input checked="" type="checkbox"/>	Add VAT Toggle - Active/ Inactive	Active: VAT will be added to the cumulative total of all costs. Inactive: No VAT will be applied.
<input type="button" value="▼ ▲"/>	Expand and Collapse	Allows users to show or hide additional details related to the bidding calculation.
<input type="button" value="↓"/> <input type="button" value="↑"/>	Reorder arrows	Enables users to adjust the order of cost items within the calculation by moving them up or down.
<input type="button" value="💾"/>	Save	Saves the bidding calculation, ensuring all entered details are recorded and applied where necessary.
<input type="button" value="⬅️"/>	Back	Returns users to the previous screen without saving changes, allowing them to exit without modifying bidding calculations.

# Venue's

The screenshot displays the PremBid application interface for managing Venues. On the left is a teal navigation sidebar with the following menu items: Auctions, Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues, Integration), and System Documentation. The main content area is titled 'Venues' (1) and features a search bar (2) with a magnifying glass icon. Below the search bar is a table with columns for 'Name' (3) and 'Description' (4). The table contains one entry: 'Devo KZN'. To the right of the table are several action buttons: a refresh icon (8), a plus icon (5), a share icon (6), and a delete icon (7). Below the table is a 'Venue' section (9) containing a map (10) and a text box with the following details: Name: Devo KZN, Address line 1: 3 Promed Road, Country: South Africa, State: KwaZulu-Natal, City: Pietermaritzburg, Zip: 3201. The map shows a street grid with a red pin labeled 'Primary Location' at the intersection of Promed Rd and Woodhouse Rd.

## Instructions:

1. **Venues Header**
  - Displays the title of the section, indicating that users are managing venue information.
2. **Search Bar**
  - Allows users to search for a specific venue by name or description for quick access.
3. **Name**
  - Displays the name of the venue, helping users identify locations.
4. **Description**
  - Provides additional details about the venue, such as its purpose or special features.
5. **Add a Venue**
  - Enables users to create a new venue entry by specifying its name, description, and location details.
6. **Edit a Venue**
  - Allows users to modify an existing venue's details, such as updating its name, description, or address.
7. **Delete a Venue**
  - Removes a venue from the system permanently. A confirmation prompt will appear before deletion.
8. **Refresh Button**
  - Reloads the venue list to ensure all displayed data is up-to-date.
9. **Expand and Collapse (Venue Information)**
  - Allows users to view or hide additional venue details, including address and country.
10. **Map**
  - Displays the venue's location on an interactive map for easy visualization.

## Adding a venue

**Venue Information** — 1

Name \* — 2

Description — 3

Latitude — 4  
12.98927341347826

Longitude — 5  
31.25140055644103

Address Line 1 — 6

Address Line 2 — 7

Country — 8

State/Province — 9

City — 10

Zip/Postal Code — 11

**Map Information** — 12

Enter a location — 15

Clear Secondary — 14

Use Secondary Location Coordinates — 14

Primary Location — 18

Secondary Location — 19

Click on the map to drop a pin. — 20

Map labels: Halgama, Abu Ourein, Yashi, Gelli, 'Isa Hamadayn, Mealia, Wad Sabil, Sinnayn, Umm Burmah, Umm Gennas, Umm Ruwaba, Balahat, Wad Rakheis, Al Ghabsha.

Map controls: +, -, Lock, Share

Instructions:

1. **Venue Information Header**  
Displays the title of the section where users enter details for a new venue.
2. **Name\*** (Required)  
A mandatory field where users enter the name of the venue.
3. **Description**  
An optional field where users can provide additional details about the venue.
4. **Latitude**  
Displays the latitude coordinates of the venue, either manually entered or auto-filled from the map.
5. **Longitude**  
Displays the longitude coordinates of the venue, either manually entered or auto-filled from the map.
6. **Address Line 1**  
The primary address field where users enter the street address of the venue.
7. **Address Line 2**  
An optional second address line for additional location details (e.g., suite number).
8. **Country**  
A field where users enter or select the country where the venue is located.
9. **State/Province**  
A field for specifying the state or province of the venue.
10. **City**  
The city where the venue is located.
11. **Zip/Postal Code**  
The postal code associated with the venue's address.

## **Map Section**

### **12. Map Information Header**

Indicates the section where users can interact with the map to pinpoint the venue location.

### **13. Plus (+) Button**

Allows users to add additional locations on the map.

### **14. Enter a Location**

A search bar where users can type an address to find the location on the map.

### **15. Clear Secondary**

Removes the secondary location from the map.

### **16. Map Area**

Displays the venue's location on an interactive map.

### **17. Secondary Location (Blue Pin)**

Indicates an optional secondary location that can be assigned.

### **18. Primary Location (Red Pin)**

Marks the main venue location.

### **19. Use Secondary Location Coordinates**

Fills the latitude and longitude fields with the secondary location's coordinates.

### **20. Click on the Map to Drop a Pin**

Users can click anywhere on the map to manually set a location pin.

### **21. Save Button**

Saves the new venue details to the system.

### **22. Delete Button**

Cancels the process or removes an existing venue entry.

## **User Steps to Add a Venue**

### **Step 1: Navigate to the Venue Management Screen**

1. Go to the **System Management** section in the navigation menu.
2. Click on **Venues** to open the venue management screen.
3. Click on the **Add a Venue (+)** button to open the venue entry form.

### **Step 2: Enter Venue Information**

4. In the **Name** field, enter the venue's name (**Required**).
5. In the **Description** field, enter additional details about the venue (**Optional**).
6. Enter the venue's **Latitude** and **Longitude** coordinates manually, or use the map to generate them.
7. Fill in the venue's **Address Line 1** (Street address).
8. If applicable, enter **Address Line 2** (e.g., building, suite number).
9. Enter the **Country** where the venue is located.
10. Enter the **State/Province** name.
11. Enter the **City** name.
12. Enter the **Zip/Postal Code**.

### **Step 3: Set the Venue Location on the Map**

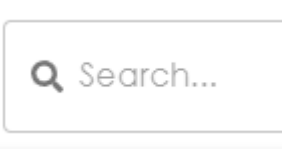





13. Click inside the **Enter a location** search bar and type the address.
14. Select the correct location from the dropdown suggestions.
15. Alternatively, click anywhere on the **map** to manually drop a pin.
16. The **Primary Location (Red Pin)** will appear where you placed the pin.
17. If adding a secondary location, click the **+ button**, then select a secondary point on the map (marked as **Blue Pin**).
18. To remove the secondary location, click **Clear Secondary**.
19. Click **Use Secondary Location Coordinates** if you want to replace the primary location's coordinates with the secondary location's details.

### **Step 4: Save the Venue**

20. Review all entered details for accuracy.
21. Click the **Save** button to store the new venue.
22. A confirmation message appears, indicating that the venue was successfully added.

### **Step 5: Confirm the New Venue**

23. The newly added venue appears in the venue list.
24. If needed, use the **Edit** button to modify details or the **Delete** button to remove the venue.

<b><u>Icon</u></b>	<b><u>Name</u></b>	<b><u>Description</u></b>
	Search	Use the Search Bar to find a venue by name or description.
	Add a venue	Click the Add a Venue button to open the venue entry form. Note: There is no need to add venues from this point.
	Refresh	Click to reload the venue list with the latest updates.
	Edit a venue	Click to modify venue details and save changes.
	Delete a venue	Click to remove a venue. Note: Ensure a venue is not attached to an Auction or Lot on Auction.
	Zoom in and out of map	Adjust the map view for better visibility.

# Integration

## Actions

The screenshot displays the PremBid system interface. On the left is a teal navigation menu with the following items: Auctions, Lots, Contacts/Agents, Users, System Management, and System Documentation. The main content area is titled "Integration" and features a tabbed interface with "ACTIONS" selected. Below the tabs is a search bar and a table with the following columns: Type, Unique Reference, Priority, Status, and Created Date. A refresh button is located in the top right corner of the table area. Numbered callouts (1-8) point to the following elements:

- 1: Integration title
- 2: Search bar
- 3: Type column header
- 4: Unique Reference column header
- 5: Priority column header
- 6: Status column header
- 7: Created Date column header
- 8: Refresh button

## Instructions

1. **Actions Tab**
2. **Search Bar**
  - Find specific actions using keywords.
3. **Type**
  - Specifies the category or kind of action.
4. **Unique Reference**
  - A distinct identifier assigned to each action.
5. **Priority**
  - Indicates the urgency level of the action.
6. **Status**
  - Displays the current state (e.g., Pending, Completed, Failed).
7. **Created Date**
  - Shows when the action was initiated.
8. **Refresh Button**
  - Updates the list to reflect recent changes.

# Entity Upsert Requests

The screenshot displays the PremBid system interface. On the left is a teal navigation menu with the following items: PremBid, NAVIGATION MENU, Auctions (with sub-items: Auctions/Create Auction, Auction Management), Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues), Integration (highlighted), and System Documentation. The main content area is titled 'Integration' and has a tabbed interface with 'ENTRY UPSERT REQUESTS' selected. Below the tabs is a search bar labeled 'Search...'. A table header is visible with columns: User, Processing Status, Created Date, and Process Date. A refresh button (circular arrow icon) is located to the right of the table header. Numbered callouts (1-7) point to the following elements: 1. Integration title; 2. Search bar; 3. User column header; 4. Processing Status column header; 5. Created Date column header; 6. Process Date column header; 7. Refresh button.

## Instructions

1. **Entity Upsert Requests Tab**
  - Displays all upsert requests for entities.
2. **Search Bar**
  - Locate specific upsert requests quickly.
3. **User**
  - Indicates the user who initiated the request.
4. **Processing Status**
  - Shows the current status (e.g., Pending, Completed, Failed).
5. **Created Date**
  - Displays when the request was made.
6. **Process Date**
  - Shows when the request was processed.
7. **Refresh Button**
  - Updates the list with the latest data.

# Image upsert Requests

The screenshot displays the PremBid system interface. On the left is a teal navigation menu with the following items: Auctions, Lots, Contacts/Agents, Users, System Management, and System Documentation. The 'Integration' section is active, showing a sub-menu with 'ACTION', 'ENTITY UPSERT REQUESTS', 'IMAGE UPSERT REQUESTS' (highlighted), 'WEBHOOK REQUESTS', and 'CONFIGURATION'. Below the sub-menu is a search bar labeled 'Search...'. A table below the search bar contains the following columns: 'User', 'Unique Reference', 'Processing Status', 'Created Date', and 'Process Date'. A table with 5 columns and 1 row is visible. A circular refresh icon is located to the right of the table. Numbered callouts (1-8) point to the following elements: 1. The 'Integration' title; 2. The search bar; 3. The 'User' column header; 4. The 'Unique Reference' column header; 5. The 'Processing Status' column header; 6. The 'Created Date' column header; 7. The 'Process Date' column header; 8. The refresh icon.

## Instructions

1. **Image Upsert Requests Tab**
  - Displays all image upsert requests.
2. **Search Bar**
  - Locate specific image upsert requests.
3. **Processing**
  - Indicates the processing details of the request.
4. **Unique Reference**
  - A distinct identifier for each request.
5. **Processing Status**
  - Shows the current status (e.g., Pending, Completed, Failed).
6. **Created Date**
  - Displays when the request was made.
7. **Process Date**
  - Shows when the request was processed.
8. **Refresh Button**
  - Updates the list with the latest data.

# Webhook Requests

The screenshot displays the PremBid system interface. On the left is a teal navigation menu with the following items: Auctions, Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues), Integration (highlighted), and System Documentation. The main content area is titled 'Integration' and contains a tabbed interface with four tabs: ACTIONS, ENTITY UPSERT REQUESTS, IMAGE UPSERT REQUESTS, and WEBHOOK REQUESTS (which is selected and highlighted in blue). A callout box with the number '1' points to the 'WEBHOOK REQUESTS' tab. Below the tabs is a search bar with the placeholder text 'Search...' and a callout box with the number '2' pointing to it. To the right of the search bar is a callout box with the number '9' pointing to a circular refresh icon. Below the search bar is a table with the following columns: User (callout '3'), Unique Reference (callout '4'), Type (callout '5'), Processing Status (callout '6'), Created Date (callout '7'), and Processed Date (callout '8').

## Instructions

1. **Webhook Requests Tab**
  - Displays all webhook requests.
2. **Search Bar**
  - Locate specific webhook requests.
3. **User**
  - Shows the user associated with the request.
4. **Unique Reference**
  - A distinct identifier for each request.
5. **Type**
  - Specifies the type of webhook request.
6. **Processing Status**
  - Indicates the request's current status.
7. **Created Date**
  - Displays when the request was made.
8. **Processing Date**
  - Shows when the request was processed.
9. **Refresh Button**
  - Updates the list with the latest data.

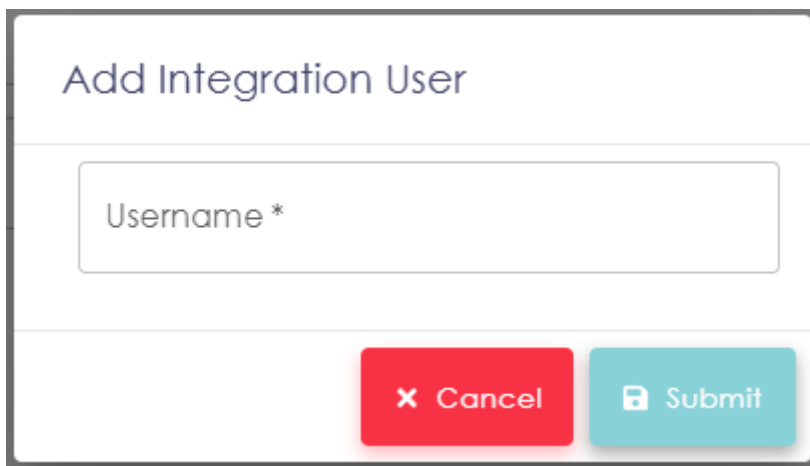
# Configuration

The screenshot shows the PremBid web application interface. On the left is a teal navigation menu with the following items: Auctions (with sub-items: Auctions/Create Auction, Auction Management), Lots, Contacts/Agents, Users, System Management (with sub-items: Lot Types, Documents, Increment Tables, Bank Details, Bidding Calculations, Venues), Integration (highlighted), and System Documentation. The main content area is titled "Integration" and has a sub-header "CONFIGURATION" (callout 1). Below this are tabs for "ACTIONS", "ENTITY UPSERT REQUESTS", "IMAGE UPSERT REQUESTS", "WEBHOOK REQUESTS", and "CONFIGURATION". The "Settings" section includes: "Webhook Processor" set to "Default" (callout 2), "Whitelisted Domains" (callout 3), and "Mode" set to "Test" (callout 4). The "Allowed Entity Types" section (callout 5) shows a "None" button. The "Users" section (callout 6) features a search bar (callout 7) and a table with columns "Username" (callout 8) and "Integration Token" (callout 9). The table contains one row with a plus sign button (callout 10) at the end.

## Instruction

1. **Configuration Tab**
  - Displays integration settings.
2. **Webhook Processor: Default**
  - Defines the default webhook processor.
3. **Whitelisted Domains**
  - Lists domains allowed to interact with the system.
4. **Mode: Test**
  - Indicates whether the system is in test mode.
5. **Allowed Entity Types**
  - Specifies which entities are permitted.
6. **Users**
  - Displays users with integration access.
7. **Search Bar**
  - Locate specific users.
8. **Username**
  - Shows the name of the user.
9. **Integration Token**
  - A unique token for authentication.
10. **Add Button**
  - Allows adding a new integration user.

## Add Integration user Modal



The image shows a modal window titled "Add Integration User". It contains a single text input field with the placeholder text "Username \*". Below the input field are two buttons: a red "Cancel" button with a white 'X' icon and a teal "Submit" button with a white document icon.

## Integration – User Guide & User Steps

The **Integration** screen provides an overview of all data imported into the system through integration APIs. This screen allows users to:

- **Rectify** errors that may have occurred during data import.
- **Configure** integration settings, including webhook processors and whitelisted domains.
- **Manage** access tokens for API authentication.

### User Steps to Navigate the Integration Screen

#### 1. Viewing and Managing Integration Actions

- Navigate to the **Integration** screen.
- Use the **Search Bar** to find specific actions by **Type, Unique Reference, Priority, Status, or Created Date**.
- Click on an action to view detailed information.
- If an issue is detected, click the **"I" icon** to see what needs correction.
- Click **Edit** to modify an entry (this redirects to the **Configurable** screen).
- Click **Refresh** to update the displayed data.

#### 2. Handling Entity Upsert Requests

- Go to the **Entity Upsert Requests** tab.
- Search for a request using the **Search Bar**.
- Review the request's **Processing Status, Created Date, and Process Date**.
- Click **Refresh** to see the most recent updates.

#### 3. Managing Image Upsert Requests

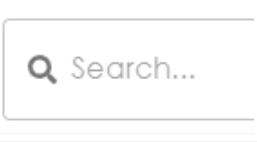


- Select the **Image Upsert Requests** tab.
- Use the **Search Bar** to locate a request.
- Review details like **Unique Reference, Processing Status, Created Date, and Process Date**.
- Click **Refresh** to update the request list.

#### 4. Viewing Webhook Requests

- Open the **Webhook Requests** tab.
- Search for specific requests using the **Search Bar**.
- Review details such as **User, Unique Reference, Type, Processing Status, Created Date, and Processing Date**.
- Click **Refresh** to reload the latest request data.

## 5. Configuring Integration Settings

- Go to the **Configuration** tab.
- Check the **Webhook Processor** settings (default processor).
- Manage **Whitelisted Domains** to allow secure integration.
- Toggle **Mode (Test/Live)** depending on system needs.
- Specify **Allowed Entity Types** for integration.
- Manage user access under the **Users** section.
- Use the **Search Bar** to locate a user.
- Click **Add** to add an integration user.

<b><i>Icon</i></b>	<b><i>Name</i></b>	<b><i>Description</i></b>
	Search	Use the Search Bar to find a venue by name or description.
	Refresh	Updates the list to reflect recent changes.
	Add integration users.	Allows adding a new integration user.