

Sale/Auction

Getting Ready for Sale

For the most part, the sale will go more smoothly if the bulk of the information about buyers, groups, and destinations can be entered before the sale begins. However, information can be entered before or during the fair, as well as updated or edited during or after the fair if a new buyer registers, or address information changes, etc.

Buyers and groups from one year's fair can be copied over to the new year fair, if the buyer list is substantially the same from year to year.

Adding Buyers (manual entry):

1. Click on the Buyers tab, then Individual Buyers
2. Click Add a Buyer.
3. Enter the Buyer's information. Note that you can enter a business name in the Name field, and (optional) a Contact name as well.
4. Click Save.

The screenshot shows a form titled "Register a new Buyer" with the following fields:

- Name** (required): This will appear on Invoices and Sale Receipts. You might want to enter a person's first and last name or the name of an organization.
- Identifier** (optional): This will be used to quickly bring up the buyer's record (try to keep it short).
- Contact** (optional): This is the name of the contact person.
- Phone Number** (optional): This will be used to contact the buyer for billing purposes.
- Email Address** (optional): This will be used to contact the buyer for billing purposes.

 Buttons for "Cancel" and "Save" are at the bottom right.

Adding Buyer Groups:

Note: Buyers must exist as individual records before they can be added to a Group.

1. Click on the Buyers tab, then Buyer Groups
2. Click Create a Group.
3. Enter a Name (required) for the group, and an optional Identifier. Both of these are searchable.
4. Click View beside the Buyer Group and then Add Buyers to add existing Buyers to the Group.

The screenshot shows a dashboard with tabs for "Order", "Buyers", "Destinations", "Auction", "Block Sale", and "Invoices". Under the "Buyers" tab, there are sections for "Individual Buyers (3)", "Buyer Groups (1)", and "Buyers". A "Create a Group" button is visible. A note states: "Below are all of the registered buyers for your fair. A buyer is a person or organization that is able to bid, buy, and pay for animals during auction. After auction has completed, each buyer is issued their own invoice. It is a good idea to enter all your buyers before your auction starts."

The screenshot shows a form titled "Adding a Buyer Group" with the following fields:

- Name** (required): This can be used to quickly bring up the group's record (try to keep it short).
- Identifier** (optional): This can be used to quickly bring up the group's record (try to keep it short).

 Buttons for "Cancel" and "Save" are at the bottom right.

The screenshot shows the "Buyer Group Details" page for a group named "New Group". It includes an "Add Buyers" button and a list of buyers in the group:

- There are currently 2 buyers in this buyer group.
- New Buyer (View / Remove)
- New Buyer (View / Remove)



Adding Buyers and Groups (spreadsheet upload):

1. Click on the Buyers tab, then Individual Buyers.
2. Click on Import Buyers on the right in Quick Help.
3. The popup box contains information about the format of the XLSX spreadsheet that can be uploaded. There are two small links at the bottom of the information to download either a blank Template (formatted with correct column headings) or Example Data.
4. When the spreadsheet is completed in the correct format, click Select File to locate and upload the buyer information.
 - **Required fields:** the 8 fields listed in the Quick Help are required—if left blank, the file will not upload. If you do not have complete information for a buyer, either add the buyer manually when the information is available, or enter a placeholder in the cell in the spreadsheet, which can be edited later as more information is available.
 - **Additional Buyers:** This upload can be repeated as many times as necessary, adding new buyers as additional information comes in. Additional buyers/groups may also be added manually during the sale if necessary.

Buyer Import

Select File

Import Rules Quick Help

You may import buyers and buyer groups in as many batches as you like.

Data Requirements

- The uploaded file must be in XLSX format.
- The first worksheet in the Excel file must have 12 columns, per the template. All other worksheets in the file will be ignored.
- The following columns *must* contain values for all buyers:
 - Name
 - Identifier
 - Phone
 - Email
 - Address Line 1
 - City
 - State
 - Zip Code
- Phone Numbers must be in the following format: ###-###-####
- Contact Name is optional
- Address Line 2 is optional
- Buyer groups are entirely optional. You may leave those two columns entirely blank if you do not wish to add any Buyer Groups. However, if you provide either **Buyer Group Identifier** or **Buyer Group Name** for a Buyer, you must provide both.

Template Example Data

Close

Adding Destinations:

1. Click on Destinations.
2. Click Add a Destination for the animals.
3. Packing Lists can be printed for each destination.

Sale

Order Buyers Destinations Auction Block Sale Invoices

There are 3 destinations Print Packing Lists Add a Destination

All-star Meat Processors	Edit
East Texas Meat Processors	Edit
Kent & O'Neil Packers	Edit

Destinations Quick Help

A destination is the final place that a live animal is sent after the conclusion of sale.

It is a good idea to enter your Packers and Meat Processors here before your sale starts.

Each destination that you enter here will be available for selection on the Entry Sale screen.

