

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):

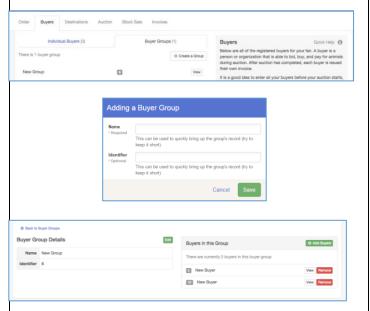
- 1. Click on the Buyers tab, then Individual Buyers
- 2. Click Add a Buyer.
- 3. Enter the Buyer's information. Note that you can enter a business name in the Name field, and (optional) a Contact name as well.
- 4. Click Save.

Register a new Buyer Name This will appear on Invoices and Sale Receipts. You might want to erter a person's first and last name or the name of an organization. Identifier * Optional This will be used to guidely bring up the buyer's record (by 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. Cancel Savo

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.



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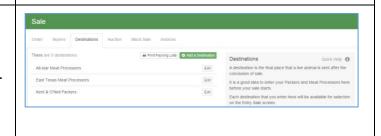
Adding Buyers and Groups (spreadsheet upload):

- 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 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: o Phone o Email o City o State . Phone Numbers must be in the following format: ###-###- Contact Name is optional Address Line 2 is optional . Buver 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. Close

Adding Destinations:

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



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