Sale Manager NxGen overview and general operation

The Next Generation of our Sale Management software " Sale Manager NxGen" is a powerful and complete Customer, Relationship Management and Marketing solution. Whether selling seedstock or any items produced by your operation Sale Manager NxGen provides the tools to market them efficiently and accurately maintain a complete relational database to expedite the ability of users to analyze sale success The user-friendly design combines powerful reporting capabilities with robust client and sale item entry and tracking.

Sale Manager NxGen is designed to enhance your customer relationships and marketing tasks by preparing sale information, managing sale transactions, recording customer activity, and providing analysis information on the performance of your items and customers where it counts the most, *in the marketplace*. Sale manager effectively handles these tasks whether you sell seedstock or other items through private treaty or at auction. Sale Manager clerks the sale, prints and reconciles invoices, delivers detailed reports, as well as instantaneous updating your client database. When your sales are over, Sale Manager provides resources for you to maintain customer files and make management decisions based on the data it stores and reports.

The copy of Sale Manager NxGen you have received or downloaded is a working demonstration version called the Trial Edition. If you have already purchased Sale Manager, you will need an activation key to remove the Trial Edition limitations. Please call our offices Toll Free at 800-584-0040 to allow us to assist in activating your product.

When Sale Manager NxGen is first launched, the database (Sale Manager.smf) will be empty and ready for you to add your items and clients either manually or by import. If you are a current Cow Sense NxGen user you will note that navigation is very similar. There is a brief menu at the top of the screen that we refer to as the Top Menu. The primary functions of Sale Manager are accessed from the Task Bar Menu on the left side of the screen. The primary purpose of this video to introduce you to basic navigation and use of Sale Manager NxGen.

If you are a current Sale Manager version 3 customer, you can convert ALL your existing data stored in your Sale Manager version 3 file to a Sale Manager NxGen file. At the top left of the Sale Manager NG screen, is a File Menu. Click File and then Convert. In the Sale Manager File Converter window, under Step 2, click on the Browse button to locate your version 3 file. Verify your new Sale Manager NG file is listed in Step 3. Click Run to proceed with the conversion. After the conversion has ran, you will receive a log file on the screen. Please review the log file and note any issues. If you have any questions, or need any assistance, please contact Cow Sense Customer Service.

The Help menu contains resources for support, as well as your licensing information and the ability to update your program. Although Sale Manager NxGen will check for Updates automatically every 11 days you can manually confirm you are at the current version from this menu.

Sale Manager's features are all located in the menus listed on the left of the screen. The first menu we will explore is the Options menu, which contains all of your customization for the program. Preferences allows you to edit the background images and colorization of your Sale Manager, as well as adjust image settings for input and sale day. The Data Field Settings menu enables you to turn on or off fields, create custom fields, and assign validations for data entry.

Once the Options have been set, navigate to the Setup Menu which contains the areas to customize your invoice with your information in the Identity screen, set up your sales, create groups for clients and set up types for items.

The Input menu contains forms for both Clients and Items. Input enables adding, editing, and reviewing data. Filter your data using the drop downs and select items or clients from the pick list.

Data can be entered or edited directly in the Input form. Note repetitive data for items or clients can be automated using the “Preset” feature.

If you also have purchased Cow Sense NxGen for your herd management needs, data can be seamlessly exchanged back and forth using our Sale Manager Exchange tool. Please see our NxGen Guide for Sale Manager Exchange for more details.

After entering some data, you can take advantage of the reporting capabilities in the View menu. This robust feature provides the ability to transform the records you have created into powerful information to assist in making more informed management decisions. Utilize the Select Tool to sort/filter and retrieve the records you want to display. These selections can be saved for use in the future and can be accessed from the selection drop down. The Setup button allows you to manage the fields you want displayed about those records and create customized layouts. These layouts can also be saved for later use.

The Sale Day menu contains functions needed for the day of the Sale; registering buyers, running the sale from the block, checking out the buyers, viewing all your invoices as well as other reports for after sale such as brand and health clearance information. Open sale has all your lot information, and you are able to easily enter the prices and buyers. Use the “I” button to show a viewer screen to your audience with the lot information. If you have videos attached to your lots, those can be played on a secondary screen as well.

Register buyers contains a list of your clients that can be assigned a bidder number, you can also make any edits to the existing clients, or enter new clients. Check Out Buyers is where you are able to review the purchase information, enter in any additional data for that purchase such as discounts, credits, and delivery instructions and print an invoice for you and the buyer. As previously mentioned, you have the ability to utilize the quick reports in Sale Day to view Item, Buyer and Invoice lists, as well as Brand and Health clearance reports for those items that have been checked out.

Along with the Sale Day reports, Sale Manager NG has extensive Report options. Reports have a pre-defined and fixed format where you can control what Standard Fields you wish to include for sales, invoices and items, but the formatting can't be changed or modified. These reports will quickly generate the information you selected and can either be printed, or the data can be exported for further analysis.

The Tools menu contains your Backup and Restore capabilities for your sale file. Simply back up to a local or external drive, or take advantage of our Remote Backup Service subscription to store your data safely on our server. You also have the capability to import data from spreadsheets to your items and clients using our Import Tool. The Group Editor function allows you to quickly assign and remove clients from group memberships by marking the clients and selecting the group they are to be added to or removed from., Remove any existing buyer numbers using the Clear Buyer Numbers function. You can even generate simple galley proofs for sale catalogs, or export the data to your printer to set up the catalog.

Whether you sell private treaty or through public auction, let Sale Manager NxGen assist you to bring your sale to its full potential.