Tips for a Successful Sale

Always:

1. Be sure to click the **Save** button after you have entered data or made changes in the program!

Preparing for the sale:

2. For each buyer, a Buyer ID is required, and must be 5 characters or less.
3. Be sure to enter the check-in weight on an entry and click Check-In before selecting the Sale Participation Status. ***Selecting the Sale Participation Status prior to entering the check-in weight will cause errors in the Sale Weight field during the sale.***
4. If you are planning to export the Custom Sale Program to Excel, be sure the Sale Order name is 30 characters or less, and don't use symbols in the name. Any names longer than 30 characters will cause an error on the Excel download.

During the sale:

5. When adding buyers during the sale, refresh the Auction screen to see the newly-added buyer on the list to select for an entry.
6. Use the arrow keys on your keyboard to move from one entry to another in the Auction Companion.
7. Be sure to enter the bid amount and buyer contribution amount for each entry. ***If one of these items is missing, it will cause errors on reports.***
8. Be sure "Amount Not Assigned" is equal to $0.00. ***An amount other than $0.00 will cause errors on reports.***
9. Entries that have bids, buyers, add-ons, adjustments or flooring data cannot be removed from the sale.
10. Add Bulk Adjustments **after** the Sale. Entering Bulk Adjustments based on a percentage prior to a bid price being entered will not calculate correctly.

After the sale:

11. The following areas are locked (no changes allowed) after checks have been generated:
    - Adding buyers to an entry
    - Adding/adjusting bids, add-ons, adjustments for Seller Fees, and proceeds distribution
    - Destination and flooring information
    - Sale participation status
12. To obtain Custom Reports for the Sale, use the filter
    - Entry: Entry Sale Participation *is Equal to* Auction *or* BlockSale (no space in Block Sale).
13. Only buyers who have contributed towards entries in the sale will appear on Custom Reports. Buyers who did not contribute are only available on the Standard Reports.
14. You can re-print the Sale Program after the Sale to obtain a simple report with auction results.