Guide to Sale Manager Exchange

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Product: **Cow Sense**® **NxGen**
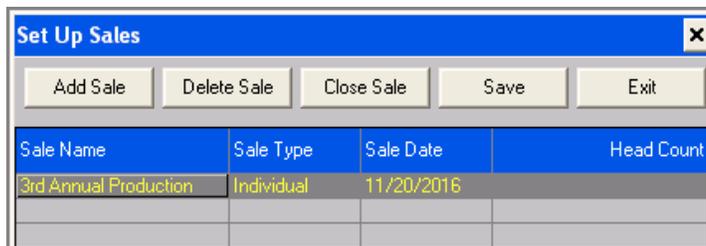Version: **5 and later**
Page: **1 of 4**

Discussion:

The Cow Sense NxGen Sale Manager Exchange allows users to move animal records between a Cow Sense NxGen Herd File and the Sale Manager program. Sale Manager is a companion product available with Cow Sense NxGen and requires a separate license to be purchased and activated. This additional product can either be purchased at the same time as your Cow Sense NxGen program or added at any later time as needed.

This Exchange process allows "Marked" records to be moved into a Sale Manager file, or sale records to be returned to update your herd file. It is important to note that the Sale Manager program will only run on a 32-bit Operating System. However, Sale Manager and NxGen do not necessarily need to be installed on the same computer.

To use the Sale Manager Exchange, Sale Manager must be updated to v3.63. You can update Sale Manager by opening the program and navigating to Help > Sale Manager Support > Update Sale Manager, or from logging into the Cow Sense Corral and clicking on Downloads. In addition you will need to insert an Activation Key in Cow Sense NxGen that includes access to the Sale Manager Exchange.

Next, set up your sale in Sale Manager with all desired information such as Sale Name, date, etc. (See the Sale Manager User's Guide from the Sale Manager Main Menu under Help.)

If Sale Manager is installed on a machine different that NxGen, copy the sale.mms file to the NxGen computer. Sale.mms can be found in your C:\CowSense\salemgr folder.
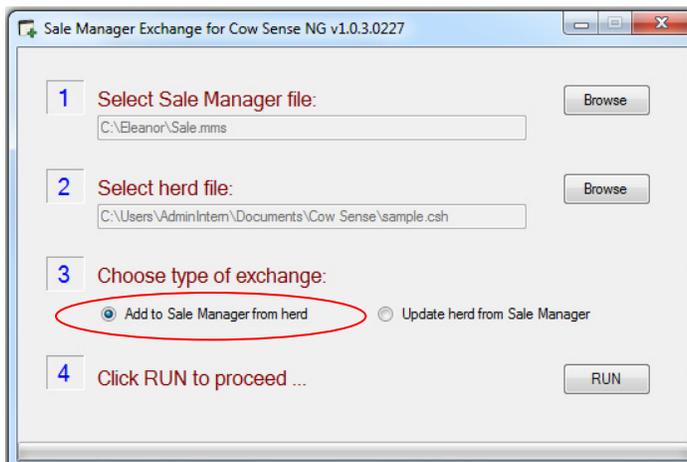
Add to Sale Manager from herd:

After the sale has been set up in Sale Manager, it is time to select records to be included in the sale. In the NxGen herd file, Mark (toggle on Identity Marker flag) all animal records that are to be added. A helpful way to do this would be to create a selection using criteria in the Animal List and marking these records. Refer to the Animal List Tutorial for more information.

Note: Data that has been completed for animal records in the NxGen herd file are populated in Sale Manager as records are moved over. If 'Lot Number' and 'Lot Order' are completed in the Sales tab in the NxGen herd file, then they will be populated in Sale Manager too. You may also wait to designate Lot Numbers and Lot Orders until you are working in Sale Manager. Do not enter data into either the Event Name or Event Date fields in NxGen before using the Exchange, especially if you do add Lot Numbers and Sale Orders to the animals in Sale Manager. These will not be linked to the sale and a new event will be created. The Exchange will add the Event Name and Date for you when you bring the data back in to NxGen after the sale.
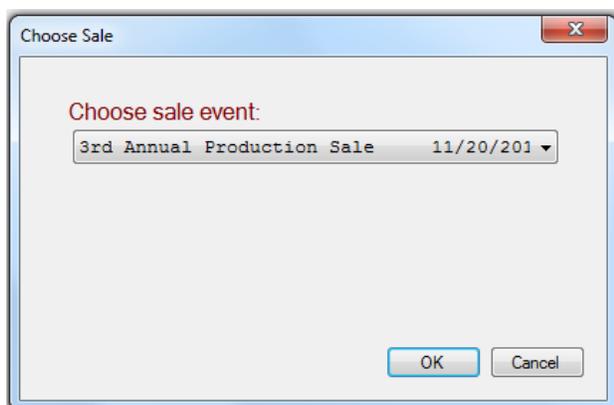
Once the desired animal records are marked, open Sale Manager Exchange (from the NxGen Side Bar Menu choose Extras > Sale Manager > Exchange).
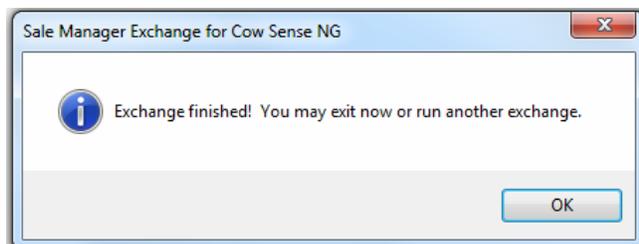
In the Exchange window, click "Browse" next to Step #1-Select Sale Manager file. Navigate to where you have saved your sale.mms file. Make sure the correct NxGen herd file appears in Step #2-Select herd file. In Step #3-Choose type of exchange, click on **'Add to Sale Manager from herd'**. Then click "Run".

A screen will appear directing you to choose the sale event. Click the drop down box and select the sale to which you want the animals added. Click "OK".

A message will appear confirming that the exchange has finished, followed by a log detailing if the exchange was successful, the number of animal records added, and any errors that may have occurred. You may wish to save this log file for future review.

Review and make any necessary corrections to animal records in NxGen. You may also wish to save this log file for future review.
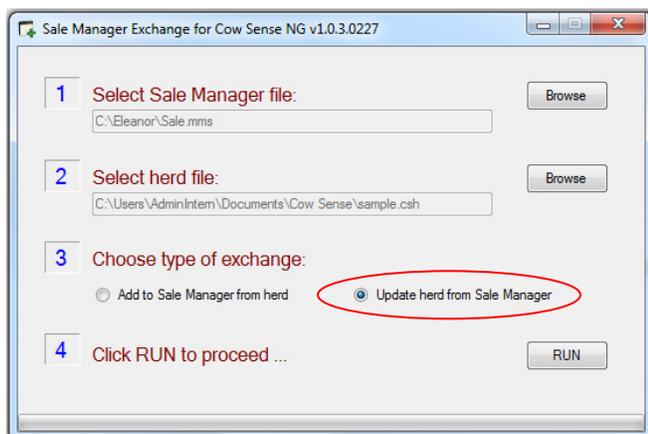
If animal data is added or changed in the herd file, it may be updated in Sale Manager by running "Add to Sale Manager from Herd" again for that animal record and the same sale. If you run " Add to Sale Manager from Herd " again for the same animal but a different sale, then the animal record will be added again into Sale Manager, but this time to the additional sale.

After you're finished adding animals from NxGen, copy the sale.mms file back over to the C:\CowSense\salemgr folder on the computer with Sale Manager (if not on the same machine). Then, open Sale Manager and view the sale file, from the Main Menu choose Activity > View > Animal List.
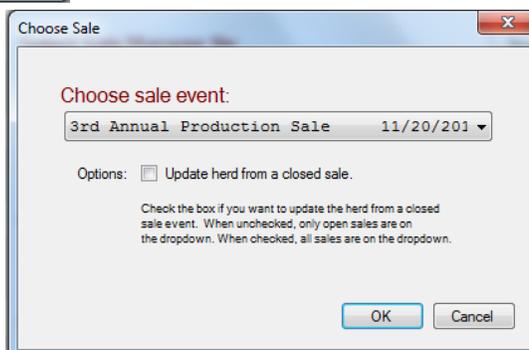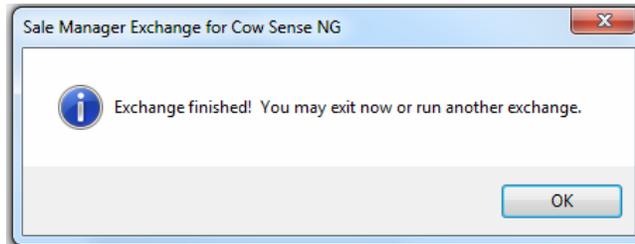

Update herd from Sale Manager:

After the sale is completed, animal records in the NxGen herd file can be updated with sale results recorded in Sale Manager. First, move the sale.mms file back from the Sale Manager computer to the NxGen computer (if Sale Manager is installed on a different computer). Then open the Sale Manager Exchange in NxGen. In the Exchange window, click "Browse" next to Step #1-Select Sale Manager file. Navigate to where you have saved your sale.mms file. Make sure the correct NxGen herd file appears in Step #2-Select herd file. In Step #3-Choose type of exchange, click on **'Update herd from Sale Manager**. Then click "Run".

A window will appear directing you to choose the sale event. Click the drop down box and select the sale you want to retrieve the data from. Check the "Update herd from a closed sale" option if the sale you are looking for has already been closed and does not appear in the dropdown. Click "OK" once the file is selected.

A message will appear confirming that the exchange has finished, followed by a log detailing if the exchange was successful, the number of animal records added, and any errors that may have occurred. You may wish to save this log file for future review.


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Sale Manager Exchange v1.0.3.0227
Log file opened: 4/26/2017 9:44:13 AM
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Sale Manager file: C:\Eleanor\Sale.mms
Herd file: C:\Users\AdminIntern\Documents\Cow Sense\sample.csh
Exchange from sale to herd: 3rd Annual Production Sale, 11/20/201
Updating the herd from 16 animal records in 3rd Annual Production
16 animal records read.
16 sale records added to the herd.
0 sale records updated in the herd.
Exchange completed successfully.

------------------------------------------------------
Exchange finished: 4/26/2017 9:45:37 AM
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Review the sale information that has been added from Sale Manager by clicking on the Sales tab of the Individual Animal View. Note that if there is already a sale record for the animal on the Sales tab where event information is empty, the Exchange uses that record for the current event and records the information brought over from Sale Manager. Otherwise it adds a new sale record, records the data and links to the animal.

Date Sold	Event Name	Event Date	Lot Number	Buyer Name	Invoice Number	Sale Price
4/26/2017	Annual Sale	4/26/2017	3	Cow Sense		1500

Please contact us at support@cowsense.com or 800-584-0040 for any questions or assistance.