Livestock Office –
Sale Notes
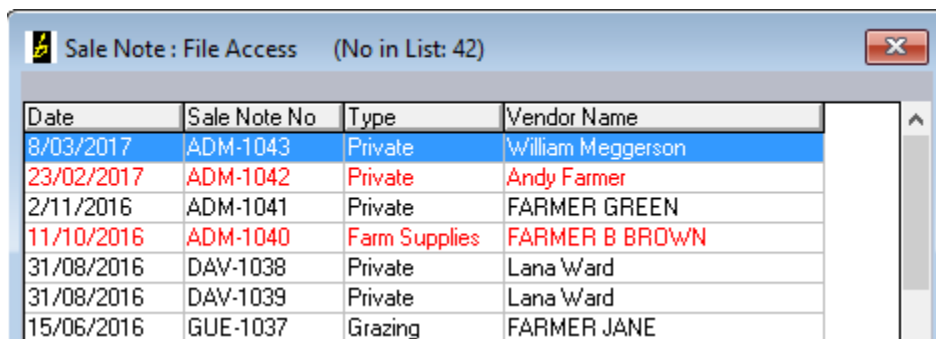
6/04/2017

Contents

Sale Notes

Livestock Office Sale Notes allow you to enter Grazing, Private and Miscellaneous sales in a single screen, and then have the ability to generate the sale directly from the Sale Note screen.

Sale Note is the Thin Client interface for the eSale web application giving agents greater responsibility and enhancing productivity.

Livestock Office main menu > Sales > Sale Notes

In the **Sale Note Lookup** screen, Sale Notes will display in Red if they do not yet have a Sale generated:

Figure 1: Sale Note Lookup Screen

Note:
- *If the user is an agent or is linked to an agent, only the sale notes where the agent is the vendor agent will be displayed, for example, Bill Bossy (agent) will only see sale notes where he is the vendor agent.*

Sale Note Screen

This is an example of the sale note screen.
This one shows all the information about a Private, one-Vendor, one-Purchaser sale.

Cat Code	Description	Sale Basis	Kg	Tally	Vend Ea	Purch Ea	VCom	Commissi ...
B	BULLS	Head per	0.000	2.000	11000.000	11000.000	5.00	% Vendor...
C18M	18 MTH CATTLE	Head per	0.000	10.000	900.000	925.000	0.00	% Vendor...
C	COWS	Head per	0.000	25.000	600.000	650.000	0.00	% Vendor...

Totals
Vendor 46000.00   Purchaser 47500.00   Com 2600.00

Figure 2: Sale Note Screen

General Fields

Field	Description
Sale Type	*Mandatory* Enter the first letter/s; **F8** or **Dble-Click** to display the lookup screen Includes Grazing, Miscellaneous and Private plus any custom types defined in Sale Note Categories.
Date	*Mandatory* **Ctrl + Space** bar for today; actual number (nn) or +nn/-nn for date this month; F8 or Dble-Click to display the Calendar
Invoice Due Date	Can be entered to set the Specific Due Date for the Creditor and Debtor Invoices on the Sale once it is generated
Vendor	*Mandatory* Enter the code; F8 or Dble-Click to display the lookup screen Vendor's full name will appear beside the Code
Vendor Agent	Enter the code; F8 or Dble-Click to display the lookup screen Agent's full name will appear beside the Code
Purchaser	*Mandatory* Enter the code; F8 or Dble-Click to display the lookup screen Purchaser's full name will appear beside the Code
Purchaser Agent	Enter the code; F8 or Dble-Click to display the lookup screen Agent's full name will appear beside the Code

Notes:

- *The Sale Note number is automatically generated from the first 3 characters of the User ID and an incrementing number*

- *The Sale Note number will be copied to the Reference and Sale Note No field on the Sale once generated*

- *At least 1 Agent MUST be entered*

Grazing Details:

These fields are only enabled if the Sale Type selected is a **Grazing** category.

Figure 3: Grazing Details

Field	Description
First Time Grazing Here	Tick this check box to automatically subtract the first day from the Number of Days
Grazing Start	*Mandatory for Grazing Sales* Date field. See **Date** in **General Fields** table for entry options
Grazing End	*Mandatory for Grazing Sales* Date field. See **Date** in **General Fields** table for entry options
Days	This is a system calculated field

Sale Note Lines:

If the eSale web application is being used, the table will already be populated with the Sale Note Lines to allow easy checking before generating a sale.
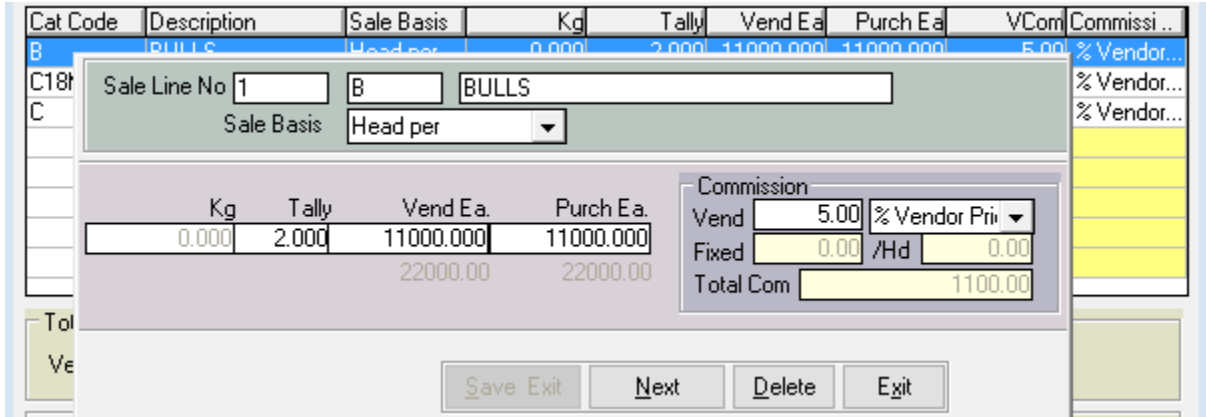
Otherwise, click on an empty line to enter new details:

Figure 4: Sale Note Line

Field	Description
Sale Line No	Automatically generated, but can be overwritten if required
Category	*Mandatory* Enter the Pen Category code; F8 or Dble-Click to display the lookup screen
Description	This will default to the selected Pen Category Description, but can be edited or modified
Sale Basis	*Mandatory* This will default to the default Sale Basis for the Pen Category Select from the drop-down list to change from the default
Kg	Enabled only if the Sale Basis is 'Kg per'
Tally	Enter the stock tally
Vend Ea	Enter the Vendor's unit price *Note: Vendor's total sale price will display beneath the Vend Ea field.*
Purch Ea	Enter the Purchaser's unit price *Note: Purchaser's total price will display beneath the Purch Ea field.*
Commission	If there is Vendor Commission, enter the amount and Commission Type *(% Vendor Price; Fixed $ or $/Head)* Fixed Total and /Hd are automatically calculated from the difference between Vendor and Purchaser prices Total Commission shows Fixed + Vendor commissions

Other Fields: on the Sale Note Screen

Field	Description
Totals	Displays the Sale Note totals for Vendor Sale, Purchaser Price and Commission Total Commission = Total Fixed Commission + Total Vendor Commission
Delivery Date	Date field. See **Date** in **General fields** table for entry options Once the Sale is generated, this date appears in the Purchaser's Sale Transaction Comments field – *Note: this is not printed*
Carrier	Enter the Carrier code; F8 or Dble-Click to display the lookup screen Once the Sale is generated, this code appears in the Purchaser's Sale Transaction Comments field - *Note: this is not printed*
Meat Board Levy	Enter any applicable Meat Board Levy. This will apply to ALL sale note lines
Comments	Once the Sale is generated, these comments will appear in the Purchaser's Sale Transaction Inv. Comment field, and will print on the Tax Invoice.
Notes	Once the Sale is generated, these comments will appear in the Purchaser's Sale Transaction Comment field These will NOT print on the Invoice
Print Button	Prints the Sale Note
Preview	Defaults to the Preview setting for the User ID Previews the report before printing
Export	Opens the Export dialog box to allow the report to be printed to a File, Excel, PDF, emailed or Faxed *(depending on your system configuration and modules available)*
Generate Sale	If all mandatory fields are complete, click this to generate the Sale The newly generated sale will display immediately to enable it to be invoiced Once the Sale has been generated, the text on this button will change to '**See Sale**' *Note:* • *This is only visible if your User Group has ADD access to the Private Sale class. See your system administrator for access.*

Notes:
- *Sale Note Fields are not able to be modified once the Sale is generated. The sale must be deleted before the Sale Note can be changed.*

- *Comment fields are not transaction specific and appear on all sale transactions if there are multiple lines.*

- *For Sale Notes of a Grazing type/category, please use only Grazing pen categories.*
  Mixing Grazing and Standard pen categories will result in unexpected totals being calculated

Sale Note Categories

Livestock Office main menu > Sales > Sale Note Categories

This is used to set and define custom Sale Note Categories which will appear in the Sale Type field.
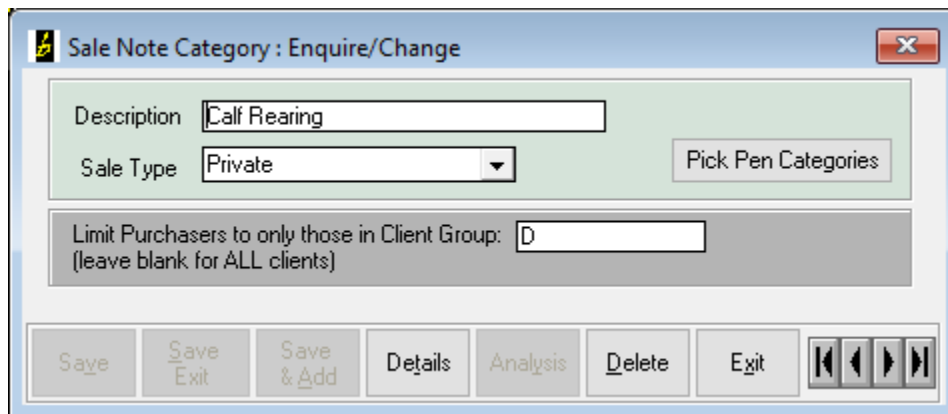

Figure 5: Sale Note Categories

Field	Description
Description	Enter the name of the category. Accepts up to 30 alpha-numeric characters
Sale Type	Select the sale type to determine the type of sale created when **Generate sale** button is clicked. Select from **Grazing, Miscellaneous or Private**.
Pick Pen Categories	Click to display all categories available. Use the arrows to move items to the selected list. Once selected, a default price can be set. Double click the item in the selected list and set the **Default Price** – This can be over typed. *Note: Categories can be pre-selected by the administrator to allow only applicable categories to pick from.*
Limit Purchasers...	The Purchasers look up can be limited by linking the Sale Note Category with a Client Group. Double click or F8 to open client lookup, select the group. This will now only open this group when looking for a purchaser.

Notes:
- *Grazing, Miscellaneous and Private are already pre-defined and these may not be modified.*
- *Once the category has been used in a Sale Note, the category may not be deleted.*
- *The Sale Type selected will determine the content of the **Purchaser look up** screen and **available pen categories** based on the settings defined for the Sale Note Category.*