HerdMASTER 4 Tip Sheet
CREATING A SALES CATALOGUE
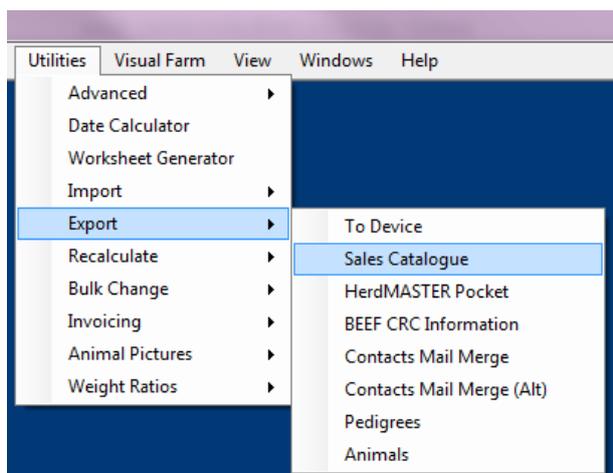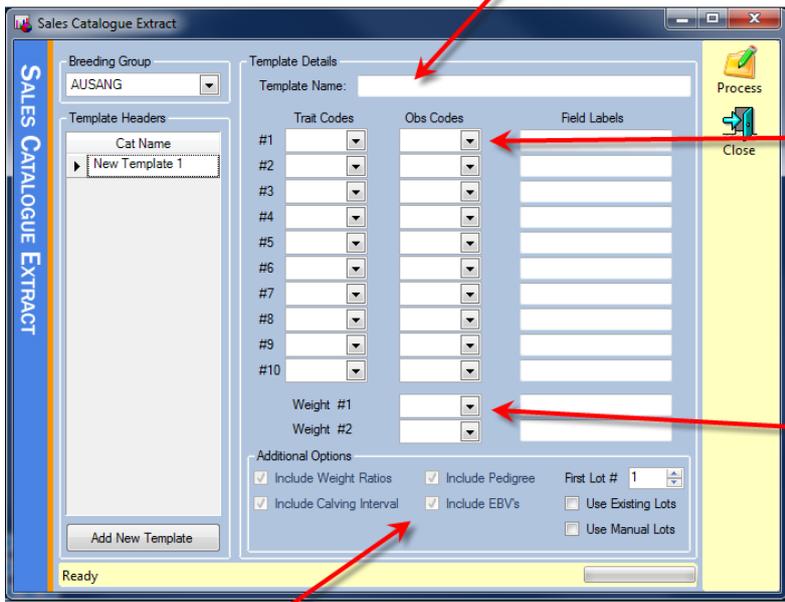
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CREATE THE SALES CATALOGUE EXTRACT

A sales catalogue you can give to customers can help in selling more of your animals and creating more of your own brand-name recognition.

Making a sales catalogue that has all the information a client wants is essential.

1. Click on **Utilities | Export | Sales Catalogue**.
2. On the following screen type in a template name.

3. Enter any traits and observation codes you wish to include in the report.

4. Field labels are just what you wish to call the data you selected on the left of there.

5. On Sales Catalogues only two weights are recorded, so choose your weights here and give them a name in field labels.

6. The additional options show what other information is included as standard in the report.

7. Next to the additional options you have the option of using lots and how to generate them for each animal.

8. Once you have this screen hit the process button and you will select which animals to include in the catalogue.
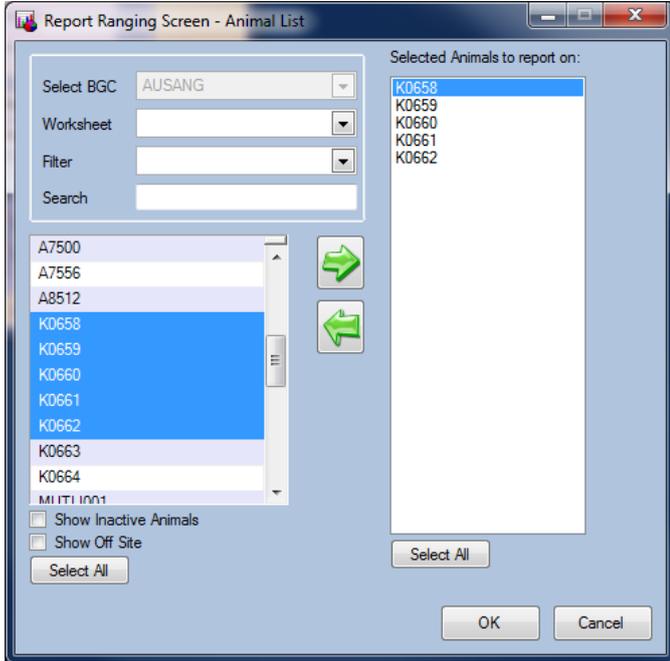

9. Select your animals and hit OK and the below window will show up while it compiles the data.
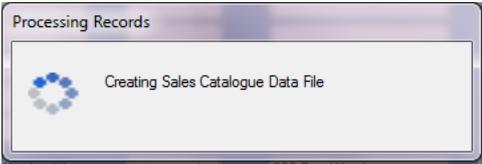
10. The following template selection window will appear

11. Select the format of template you wish to use.

- The classic templates are a more bare-bones style with the EBV information in a table on the left half of the page with the pedigree of the animal on the right. They tend to fit more animal records on each page.

- The professional templates have the pedigree at the top left and a picture (if available) of the animal on the top right. The bottom half of each record is devoted to the EBV details.
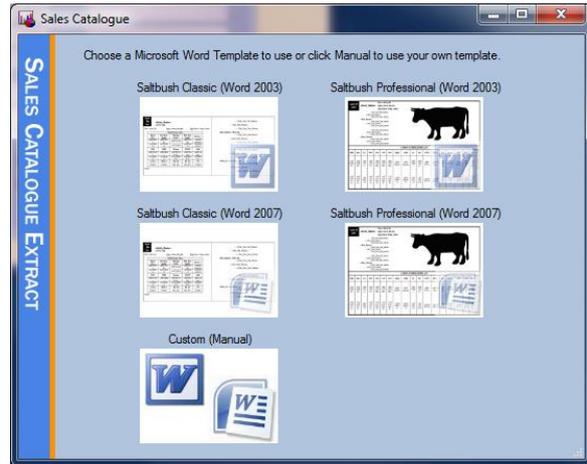
12. The custom option allows you to load the information either directly into a pre-made Word document you have set up, or save as a new DAT file to import manually in Word as a mail merge file and make a brand new template.

These outputs are **example templates only**, you must customise each one to include the data you want in the format you want to present it. We will go through the basics here with one of the pre-made templates.

CUSTOMISING THE PROFESSIONAL TEMPLATE

This example will use the professional 2007 template, I am using Microsoft Word 2013, other versions of Office/Word may vary in the way you do things but the core concepts should be the same, please see Microsoft's webpages for help with Word.

1. When I export the catalogue, Word opens with the template already created, it should appear similar to the below image:

2. The important thing to remember is that this is JUST a template, you may alter **everything** here, from what data is displayed to how to display it, you can also save your new file and save as a new file to create your own template for use with the custom option in the template chooser.
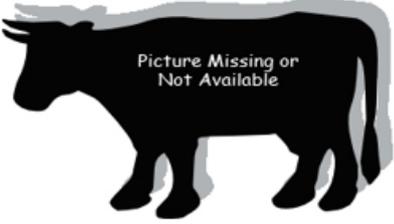
3. If you look at the information on the sheet in Word you will see things like <<Birth_Dt>>, these are the data from the animals you are extracting (in the above case it is the birth date of each animal)

«Lot_N um»	«Anim_Name»	Born: «Birth_Dt» Ident: «Anim_Soc_Id» Reg.Status: «Rego_Code»	

– «Sire_Sire_Sire_Name»
-- «Sire_Sire_Name»
  -- «Sire_Sire_Dam_Name»
«Sire_Name»
  -- «Sire_Dam_Sire_Name»
-- «Sire_Dam_Name»
  -- «Sire_Dam_Dam_Name»

– «Dam_Sire_Sire_Name»
-- «Dam_Sire_Name»
  -- «Dam_Sire_Dam_Name»
«Dam_Name»
  -- «Dam_Dam_Sire_Name»
-- «Dam_Dam_Name»
  -- «Dam_Dam_Dam_Name»

Picture Missing or Not Available

Notes: «CatalogueNotes»

GROUP BREEDPLAN

DIR	Mat	GL	BW	200	400	600	900	Milk	SS	DC	CWT	EMA	Rib	Rump	RBY	IMF	Doc	NFI
«EBVCE_Direct»	«EBVCE_Maternal»	«EBVGestation_Len»	«EBVBW»	«EBV200_Day_Growth»	«EBV400_Day_Weight»	«EBV600_Day_Weight»	«EBV900_Day_Weight»	«EBV200_Day_Milk»	«EBVScrotal»	«EBVDays_To_Calv»	«EBVCarcase_Weight»	«EBVEMA»	«EBVRib_Fat»	«EBVRump_Fat»			«EBVDocility»	«EBVNet_Feed_Int»
«ACCCE_Direct» %	«ACCCE_Maternal» %	«ACCGestation_Len» %	«ACCBW_Maternal» %	«ACC200_Day_Growth» %	«ACC400_Day_Weight» %	«ACC600_Day_Weight» %	«ACC900_Day_Weight» %	«ACC200_Day_Milk» %	«ACCScrotal» %	«ACCDays_To_Calv» %	«ACCCarcase_Weight» %	«ACCEMA» %	«ACCRib_Fat» %	«ACCRump_Fat» %	%	%	«ACCDocility» %	«ACCNet_Feed_Int» %

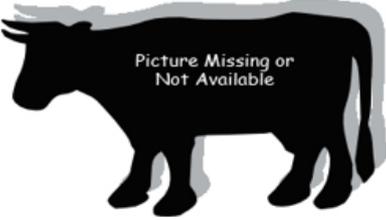4. Please note the pre-formatted templates are set up to show mostly EBV information, the animals I am working with in my data do not have any BREEDPLAN or EBV information, so in the following steps I will re-format the template to suit my needs.
If you find the built-in templates are enough for you skip to step 10.

5. First I get rid of all the EBV data out of its area, I will use this for my own information.

6. Next I have decided I just want my 200day weight (weight 1 when I extracted) and my 400day weight and a field which tells the average daily weight gain between the two. (assuming exactly 200 days have passed between)
Using the Insert Merge Field button I can easily scroll down the list of data that I have available and insert it into appropriate areas.

Born: «Birth_Dt»		
«Lot_Num» «Anim_Name» Ident: «Anim_Soc_Id»		
Reg Status: «Rego_Code»		
-- «Sire_Sire_Sire_Name» -- «Sire_Sire_Name» -- «Sire_Sire_Dam_Name» «Sire_Name» -- «Sire_Dam_Sire_Name» -- «Sire_Dam_Name» -- «Sire_Dam_Dam_Name» -- «Dam_Sire_Sire_Name» -- «Dam_Sire_Name» -- «Dam_Sire_Dam_Name» «Dam_Name» -- «Dam_Dam_Sire_Name» -- «Dam_Dam_Name» -- «Dam_Dam_Dam_Name»	Picture Missing or Not Available	
Notes: «CatalogueNotes»		
200 Day Weight	400 Day Weight	ADWG
«Weight1»	«Weight2»	{= ({ MERGEFIELD "Weight2" }-{ MERGEFIELD "Weight1" })/200}

7. Now the last field looks quite complex as I am using a calculation in Word, for reference on how to do calculations in Word, please see your Microsoft documentation or the many tutorials on the internet. In this particular calculation I have told the system that Weight2-Weight1 should be divided by 200. (Weight2-Weight1)/200 is a simplified way of looking at it.

Now if you wanted a truly accurate picture of the animal you would use the adjusted weight ratios (named just as ratio1-ratio6) so that the weights have been balanced against the difference between their age at the weigh-ins and the date of the weigh in. (We don't want a calf at 175 day age, when 200 day recording, is compared to one that is 220)
!! IMPORTANT NOTE !!
To use the ratios they must be calculated in HerdMASTER prior to the export of the Sales Catalogue
You can do this by going to **Utilities | Weight Ratios | Calculate Adjusted Weights and Ratios**.

8. Now if you scroll down the page you will see a second table with the exact same information in it as the original. I copy and pasted over the new table with my edited one UNDERNEATH the <<Next Record>> signifier (otherwise we will get two copies of the one animal per page).

9. I generally save my updated template now so that I can re-use it later. Save as a name you can recognise later if you wish to use this design as a template you can automatically load your data into later.

10. Hit the finish and merge button and edit individual documents to complete the templates and get the final output. Just remember, if you have a different version of word this may be located elsewhere or under a menu list on the top bar.
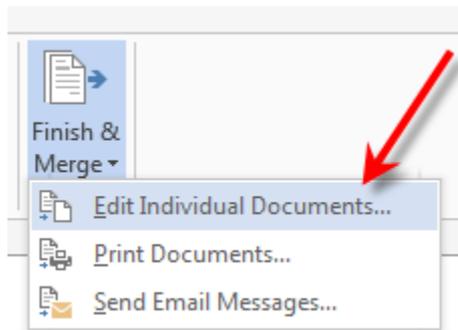
11. Once you have merged, all the animals you have selected will be inserted into the pages, you can now save this as a PDF file or print and get your sales catalogue out.
    Another option would be to save this as a PDF file and then attach it to a mail merge of your contact list and send your sales catalogue to all your clients.