

Converting BOAWOs into Straight Products



Your customers want to prebuy blends; you want use straight products for the flexibility (just in case they change their minds in the spring about the blends they’re taking).

Start with a BOAWO (blend on a work order), print the prepayment receipt, then break down the blend into its individual commodities. When the grower returns to pick up, you can mix them any blend they want and still link back to the work order.

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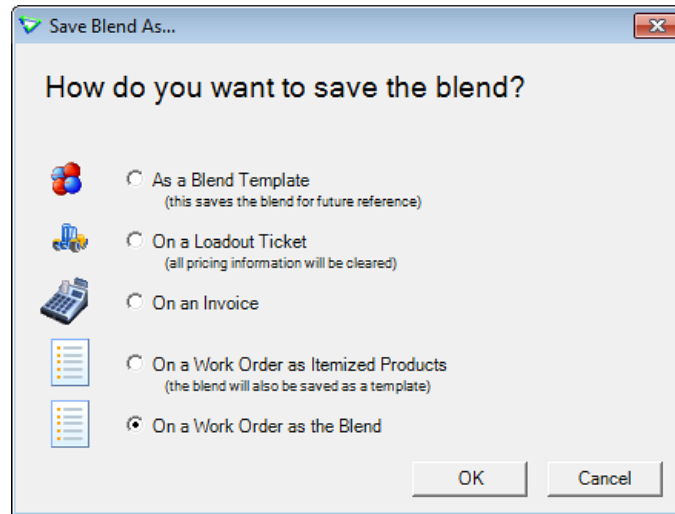
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Note

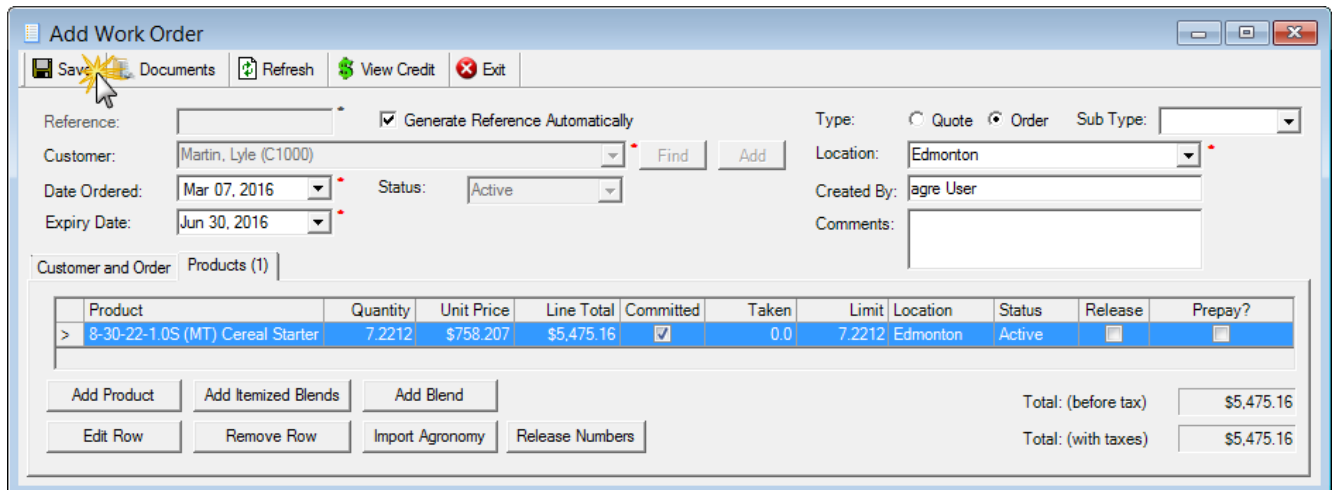
If you are using **Grower Central**, and you don’t want the customer seeing the individual commodity prices, you will likely want to prevent them from viewing their work orders so that this information remains hidden.

Making a Blend on a Work Order

Start with **Make a Blend** and save the blend **on a Work Order as the Blend**.



You'll use this work order to create a **Prepayment Receipt for the blend** to give to the customer.



The "Add Work Order" form includes a toolbar with "Save", "Documents", "Refresh", "View Credit", and "Exit".

Fields include:

- Reference: (with "Generate Reference Automatically" checked)
- Customer: Martin, Lyle (C1000) (with "Find" and "Add" buttons)
- Date Ordered: Mar 07, 2016
- Expiry Date: Jun 30, 2016
- Status: Active
- Type: Order (selected), Sub Type: (dropdown)
- Location: Edmonton
- Created By: jagre User
- Comments: (text area)

Customer and Order: Products (1)

Product	Quantity	Unit Price	Line Total	Committed	Taken	Limit	Location	Status	Release	Prepay?
> 8-30-22-1.0S (MT) Cereal Starter	7.2212	\$758.207	\$5,475.16	☒	0.0	7.2212	Edmonton	Active	☐	☐

Buttons: Add Product, Add Itemized Blends, Add Blend, Edit Row, Remove Row, Import Agronomy, Release Numbers

Totals:

- Total: (before tax) \$5,475.16
- Total: (with taxes) \$5,475.16

Accepting the Prepayment Deposit

From the customer's account, click **Accept Prepayment**

Customer Account Information for Martin, Lyle (C1000)

New Search Refresh Agronomy Exit

Martin, Lyle (C1000)
PO Box 18
Westlock, AB T9K 3L2

P: 780.459.1200
M: 780.989.2300

Net Balance (including Prepayments): (\$90,515.54) Accept Payment
Balance (excluding Prepayments): \$4,014.65 Return Funds
Unapplied Credits: \$3,810.00 Apply Credits
Prepayment Funds Available: \$94,530.19 **Accept Prepayment**

Account History CRM Activity Documents Agronomy

Date	Type	Reference	Location	Amount
Mar 07, 2016	Work Order	WO112	Edmonton	

View Item Edit Delete Show Last Year

Confirm the Deposit Date and Location, then click **Reference Work Order** (you could have also started with **Accept Prepayment** and created a new work order instead of referencing an existing one; the end result would be the same)

Accept Prepayment

Save Refresh Exit

Customer: Martin, Lyle (C1000) Find Add Current Prepayment Balance: \$94,530.19
Address: PO Box 18 Deposit Date: Mar 07, 2016
Westlock, Alberta T9K 3L2 Deposit Location: Edmonton
780.459.1200

Product (Units)	Quantity	Unit Price	Amount	Prepaid Taxes	Limit	WO Ref
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Reference Work Order New Work Order Edit Work Order Remove Row
Use Work Orders from:
Comments:
Prepaid Items Subtotal: \$ 0.00
Deposit Amount: \$ 0.00
Paid by:
Tracking/Cheque #:

Choose the blend from the WO then click **Use Selected Rows**.

If the BOAWO was not prepaid, agrē will now flag it as prepaid.

Double check that you have the right blend and WO on the prepayment, enter your deposit amount, and the method of payment (if you customer paid you by cheque, add their cheque number so it prints on the prepayment receipt).

When you are done with accepting the prepayment deposit click **Save** and **print** the Prepayment Deposit Receipt for the customer.

Converting the BOAWO into Itemized Products

***These next few steps can be done now while it is fresh in everyone's mind – which makes it easier come Spring - or you can wait until spring and see if the customer changes their mind.

Depending on the percentage of customers that want to pick up a different blend than they ordered, you may find it easier to deal with it in the Spring only in the event it happens – or you can do it now in order for things to run more smoothly in the Spring.

Now that the blend has been saved and the customer has signed off and you have accepted their money, it is safe to change the blend into its individual products. This will make things much more efficient come Spring if the customer decides that they are no longer taking that exact same blend.

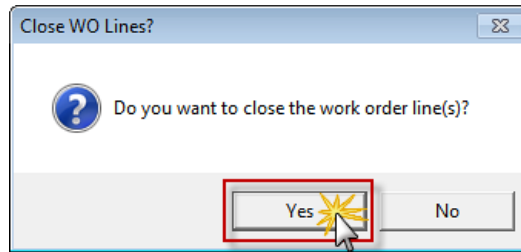
Edit the work order and click **Add Itemized Blends**.

Product	Quantity	Unit Price	Line Total	Committed	Taken	Limit	Location	Status	Release	Prepay?
> 8-30-22-1.0S Blend (MT) Cereal	7.2212	\$758.207	\$5,475.16	[checked]	0.0	7.2212	Edmonton	Active	[unchecked]	[checked]

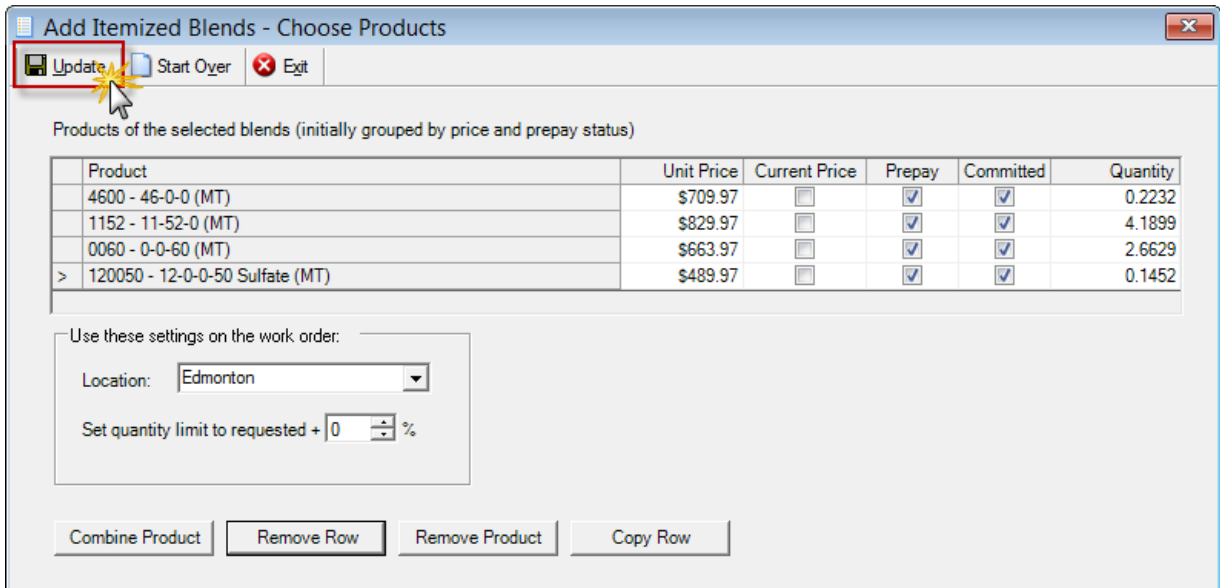
A list of Blends will appear to choose from (you can filter a long list by choosing *Show Blends on Orders* only, or shorten the *Date Range* to just today). Choose the blend you are itemizing (the one you just accepted the prepayment dollars for) by checking **Use**. Be sure that it is still flagged as **Prepaid** and **Committed**.

Date	Type	Reference	Blend Name	Description	Field Size	Unit Price	Use	Quantity
> Mar 07, 2016	Order	WO112	8-30-22-1.0S	Cereal Starter	160.00	\$758.21	[checked]	7.2212

When prompted to **close the work order line**, click **Yes** or you'll be doubling up on your commitments (once for the blend, and once for the commodities).



The products, quantities, and prices that display here are based on the blend you selected. Click **Update**.

A window titled "Add Itemized Blends - Choose Products" with a close button (X) in the top right. It has three buttons at the top: "Update" (highlighted with a red rectangle and a yellow starburst), "Start Over", and "Exit". Below the buttons is a section titled "Products of the selected blends (initially grouped by price and prepay status)" containing a table with 6 columns: Product, Unit Price, Current Price, Prepay, Committed, and Quantity. The table lists four products. Below the table is a section titled "Use these settings on the work order:" with a "Location:" dropdown menu set to "Edmonton" and a "Set quantity limit to requested + 0 %" input field. At the bottom are four buttons: "Combine Product", "Remove Row", "Remove Product", and "Copy Row".

Product	Unit Price	Current Price	Prepay	Committed	Quantity
4600 - 46-0-0 (MT)	\$709.97	☐	☒	☒	0.2232
1152 - 11-52-0 (MT)	\$829.97	☐	☒	☒	4.1899
0060 - 0-0-60 (MT)	\$663.97	☐	☒	☒	2.6629
> 120050 - 12-0-0-50 Sulfate (MT)	\$489.97	☐	☒	☒	0.1452

The blend row is flagged as **Closed** (which prevents you from accidentally linking to it), and the straight product rows are based on the individual products in that same blend (as well as their quantities and prices).

Edit Work Order: WO112

Reference: WO112
 Customer: Martin, Lyle (C1000)
 Date Ordered: Mar 07, 2016
 Expiry Date: Jun 30, 2016
 Status: Active
 Type: Order
 Location: Edmonton
 Created By: jagre User

Product	Quantity	Unit Price	Line Total	Committed	Taken	Limit	Location	Status	Release	Prepay?
> 8-30-22-1.0S Blend (MT) Cereal S	7.2212	\$758.207	\$5,475.16	☒	0.0	7.2212	Edmonton	Closed	☐	☒
4600 - 46-0-0 (MT)	0.2232	\$709.97	\$158.47	☒	0.0	0.2232	Edmonton	Active	☐	☒
1152 - 11-52-0 (MT)	4.1899	\$829.97	\$3,477.49	☒	0.0	4.1899	Edmonton	Active	☐	☒
0060 - 0-0-60 (MT)	2.6629	\$663.97	\$1,768.09	☒	0.0	2.6629	Edmonton	Active	☐	☒
120050 - 12-0-0-50 Sulfate (MT)	0.1452	\$489.97	\$71.14	☒	0.0	0.1452	Edmonton	Active	☐	☒

there is a company config option that excludes the value of closed, untaken rows from the Total (Accts Rec/Work Orders/General Defaults)

Total: (before tax) \$5,475.19
 Total: (with taxes) \$5,475.19

Caution You don't want to **Delete** the blend row because that will delete the blend from the customer's blend history. Come spring, it will be much quicker to copy the blend than to create it from scratch – even if you have to make a slight change to it (like adding a pinch more nitrogen or sulphur).

Now, no matter what blend your customer wants to pick up in the Spring, the work order is ready. **Save** the work order when you are done.

Reporting

The closed blend shows on two reports.

Work Order

The work order report shows the blend the customer ordered (flagged as closed and valued at \$0) and the ingredients required to make that blend.



TSL Custom Ag & Fuel Inc.
24715 Yellowhead Trail West
Edmonton, Alberta T6R 7L4
Phone: 780.466.1273
Fax: 780.466.1273
Toll Free: 800.555.1212
Order: WO112

Date: Mar 07, 2016

Status: Active
Expiry Date: Jun 30, 2016

Lyle Martin (C1000)
PO Box 18
Westlock, AB T9K 3L2

780.459.1200

Location: Edmonton

there is a company config option that excludes the value of closed, untaken rows from the Total (Reports/Default Criteria/Work Orders)

Product	Quantity Units	Price Committed	Prepaid	Taken	Status	Total
8-30-22-1.0SBlend Cereal Starter	7.2212 Metric Tonne	\$758.207	☒	☒	0.00 Closed	\$0.00
Density: 63.9, Rate: 99.5 lb/acre, 160 acre, Cost/acre: \$34.22, 8N - 30P - 22K - 1S 46-0-0: 0.2232 MT @ \$709.97 11-52-0: 4.1899 MT @ \$829.97 0-0-60: 2.6629 MT @ \$663.97 12-0-0-50 Sulfate: 0.1452 MT @ \$489.97						
46-0-0 (4600)	0.2232 Metric Tonne	\$709.97	☒	☒	0.00 Active	\$158.47
11-52-0 (1152)	4.1899 Metric Tonne	\$829.97	☒	☒	0.00 Active	\$3,477.49
0-0-60 (0060)	2.6629 Metric Tonne	\$663.97	☒	☒	0.00 Active	\$1,768.09
12-0-0-50 Sulfate (120050)	0.1452 Metric Tonne	\$489.97	☒	☒	0.00 Active	\$71.14
If you have any questions please call your client support rep Mike, at extension 5. (customer work order note)						
Grand Total:						\$5,475.19

Customer Prepayment

The customer prepayment report shows the straight products the customer has prepaid, as well as the prepaid blend the customer ordered (flagged as closed and valued at \$0).



TSL Custom Ag & Fuel Inc.
Customer Prepayment
 Mar 01, 2016 to Mar 14, 2016

Lyle Martin (C1000)
 PO Box 18
 Westlock, AB T9K 3L2
 780.459.1200

Opening balance as of Mar 01, 2016	\$94,530.19
Net deposits and transfers	(\$89,055.00)
Net withdrawals	\$0.00
Net prepayment as of Mar 14, 2016	\$5,475.19
Less: Remaining on work orders	\$5,475.19
Less: Pending withdrawals	\$0.00
Unallocated / (Over Committed)	\$0.00

Prepayment Plan

Product	Date	Reference	Requested	Limit	Taken	Remaining	Unit Price	Allocated
0-0-60 - Metric Tonne	Mar 07, 2016	WO112	2.6629	2.6629	0	2.6629	\$663.97	\$1,768.09
11-52-0 - Metric Tonne	Mar 07, 2016	WO112	4.1899	4.1899	0	4.1899	\$829.97	\$3,477.49
12-0-0-50 Sulfate - Metric Tonne	Mar 07, 2016	WO112	0.1452	0.1452	0	0.1452	\$489.97	\$71.14
46-0-0 - Metric Tonne	Mar 07, 2016	WO112	0.2232	0.2232	0	0.2232	\$709.97	\$158.47
8-30-22-1.0S - Metric Tonne	Mar 07, 2016	WO112	7.2212	7.2212	0	Closed	\$758.21	\$0.00
Total:								\$5,475.19

Deposits/Adjustments

Date	Reference	Type	WO Ref	Amount
Mar 07, 2016	EPPD39	Deposit	WO112-1	\$5,475.16

Thank you, Lyle!