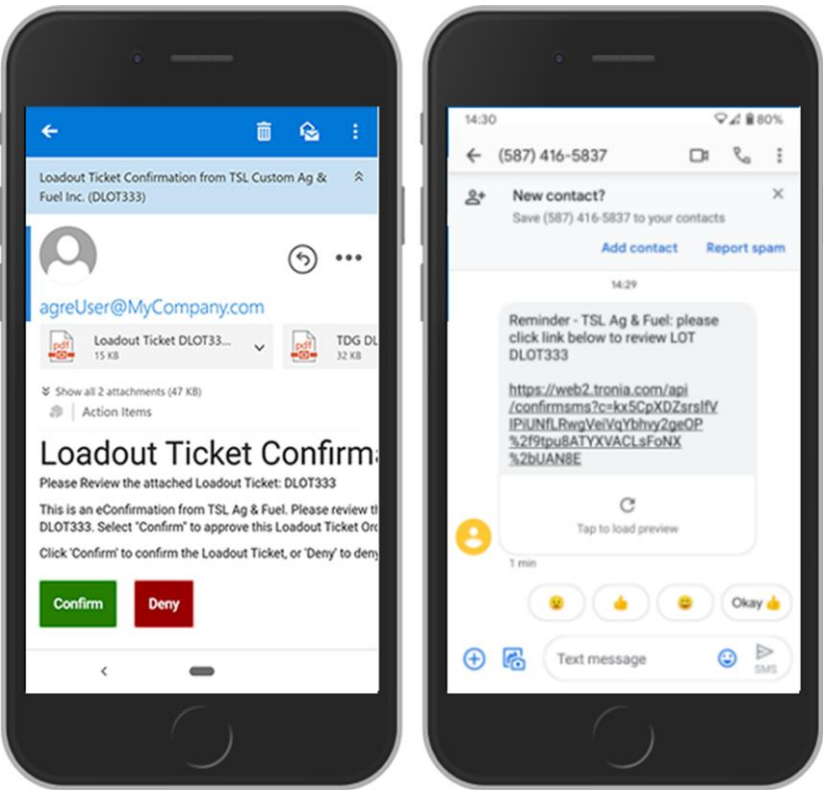


eConfirmation



The eConfirmation (electronic confirmation) process allows you to send an electronic communication (email or text) to a customer with details regarding a specific Work Order, Loadout Ticket, or Invoice. The customer reviews the transaction details, then chooses to **Confirm** or **Deny** the activity via a link embedded in the email or text. Depending on the option selected, a response is returned to agrē and the confirmation status, who confirmed, date, time, etc. is documented.

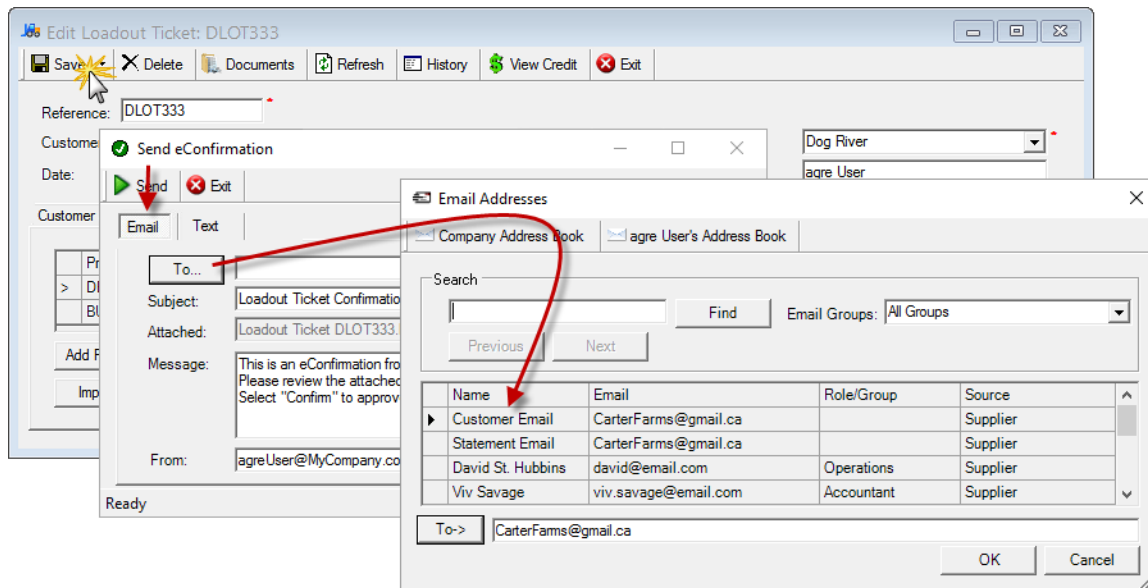
What you'll find:

- eConfirmation Overview 2
- eConfirmation Setup (one-time tasks)..... 3
- Sending eConfirmations 6
- Customer Confirmation/Denial 12
- Managing eConfirmations 14
- eConfirmation Reports and Exports 18

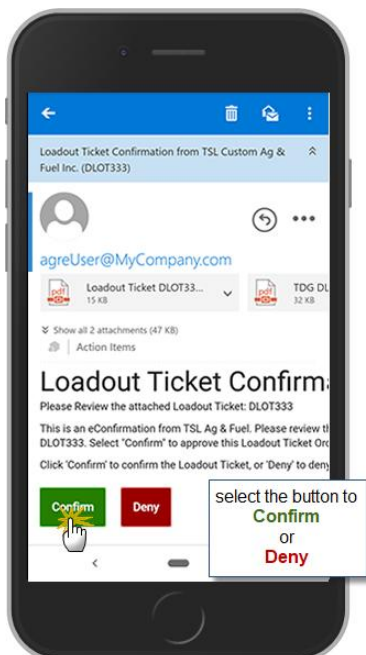
eConfirmation Overview

This is an overview of the eConfirmation process for a Loadout Ticket. The process works the same for Work Orders and Invoices.

A customer arrives to pick up some of their preordered crop protection products. The items have been pulled from the shed and are waiting to be loaded in view of the customer so they can confirm what they are receiving. The shipper loads the product, saves the Loadout Ticket, and is prompted to send an eConfirmation - with TDG attached - to the customer via email or text (easily select from email addresses and phone numbers stored on the customer's account, or enter one on the fly).



save Loadout Ticket to initiate eConfirmation



sample confirmation email

The customer approves the loadout ticket from their cell phone (internet connectivity required) and leaves the yard with their product.

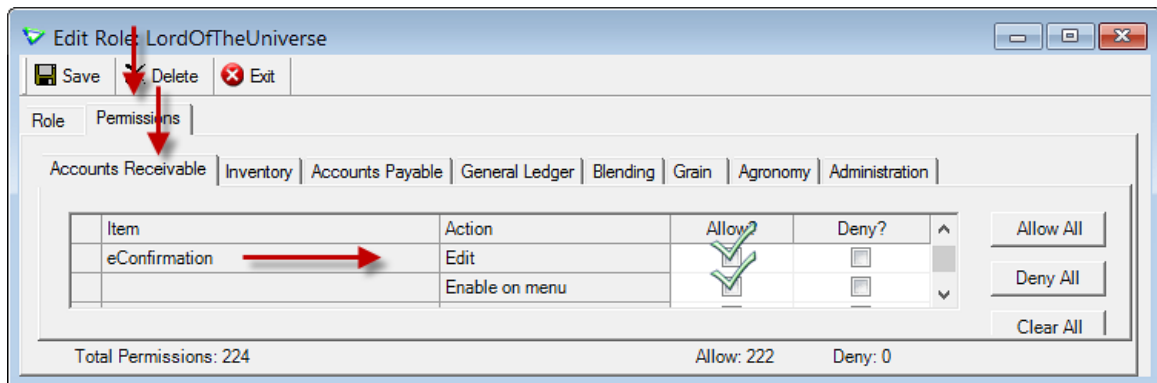
eConfirmation Setup (one-time tasks)

Before agrē can start sending eConfirmations, a few things need setup.

Security Permissions

This symbol  indicates a security permission update is required to allow access.

No additional security permission is required to *send* eConfirmations, but users will require permission to *manage* them (view, change status, send reminders, etc.)



File > Security > Manage Roles

Configuration Options

There are eConfirmation configuration options that can be set at the Company and Location level to customize the workflow for your business.

Company Configuration Options

eConfirmations can be sent for the following Accounts Receivable transactions:

- Work Order
- Loadout Ticket (TDG optional)
- AR Invoice (TDG optional)

Enable and **Prompt on Save** to send eConfirmations only for the transactions you want.

The examples below may give you some ideas:

File > Config Options > Company

Automatically Expire Pending Confirmations Optionally expire pending confirmations automatically after a certain number of days. (e.g. Work Order/Quote pricing must be confirmed within 3 days)

eConfirmations that are **Expired** (or **Cancelled**) **cannot be confirmed or denied**.

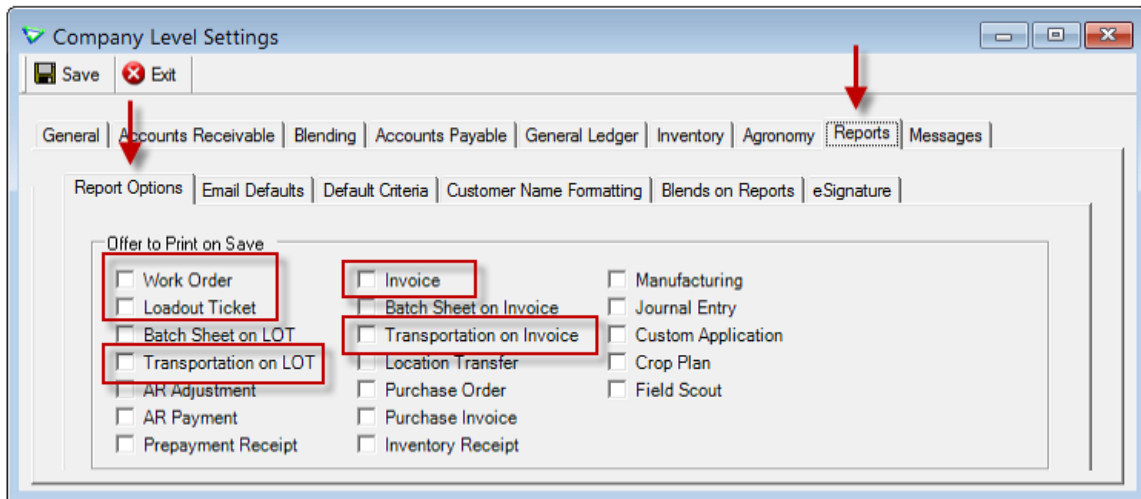
Include TDG A TDG Report will be included with each eConfirmation except when the transaction involves:

- only Non-Inventory Items
- only Returns (unless your database is configured to generate a TDG for Returns)

Text Note Start with your company name. Your customers won't recognize the phone number and you want them to know it's from a safe sender. If Text Notes are inactive, your company has chosen to send by email only.

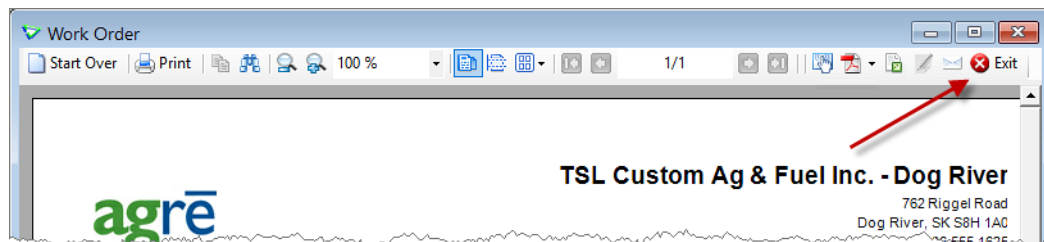
A link to view the transaction report will be appended after the Email or Text Note you enter.

If you will no longer be *printing* transaction reports in addition to sending them electronically, you may want agrē to stop prompting you. Optionally clear the **Offer to Print on Save** checkboxes for **Work Orders, Loadout Tickets, and Invoices**.

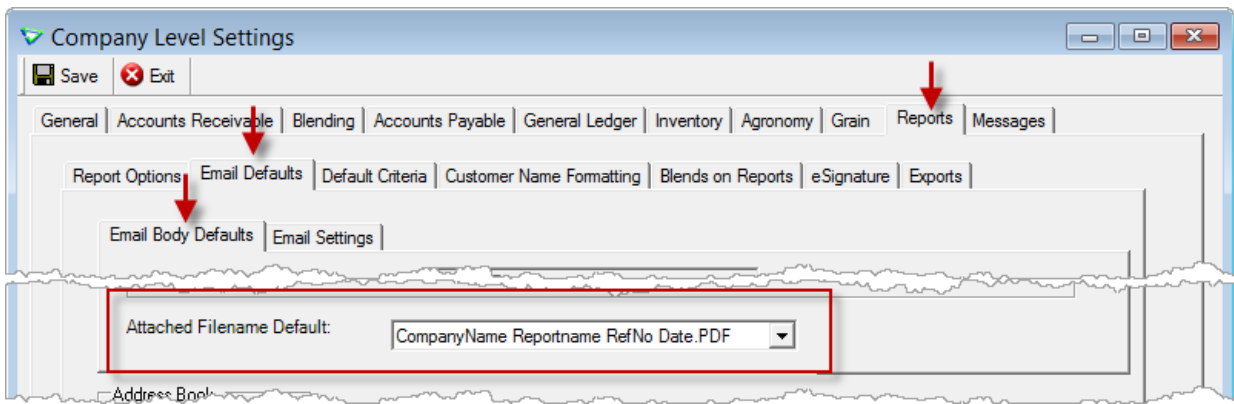


File > Config Options > Company

Turning off the printing prompts will also turn off the report previews, so leave them checked if you prefer to see what you're sending before it goes out - after you preview the report click **Exit**, then you'll be prompted to send the eConfirmation.



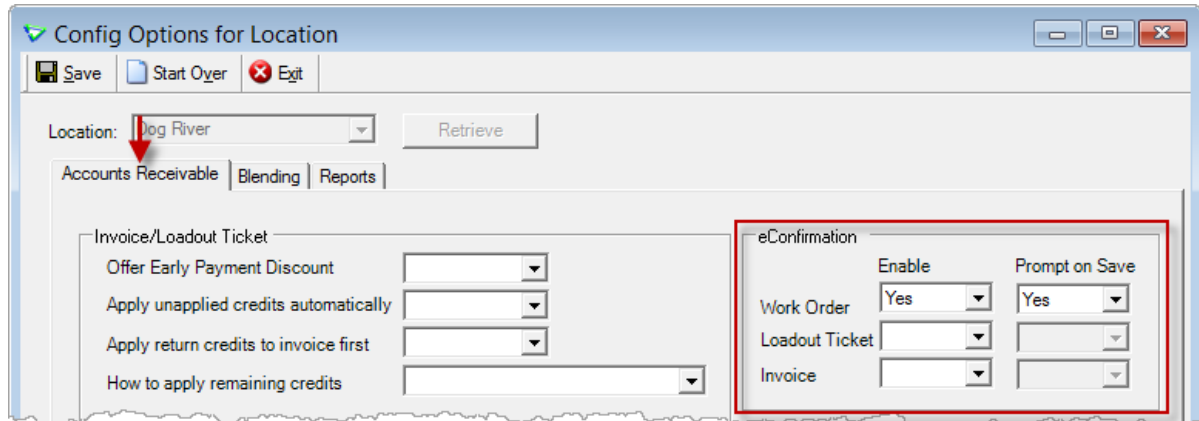
(optional) Choose a different file name format for the electronic version of the transaction report.



File > Config Options > Company

Location Configuration Options

The Company eConfirmation settings can be **overridden** at the Location level.



Config Options for Location

Location: Dog River Retrieve

Accounts Receivable Blending Reports

Invoice/Loadout Ticket

Offer Early Payment Discount [Dropdown]

Apply unapplied credits automatically [Dropdown]

Apply return credits to invoice first [Dropdown]

How to apply remaining credits [Dropdown]

eConfirmation

	Enable	Prompt on Save
Work Order	Yes	Yes
Loadout Ticket	[Dropdown]	[Dropdown]
Invoice	[Dropdown]	[Dropdown]

File > Config Options > Location

Sending eConfirmations

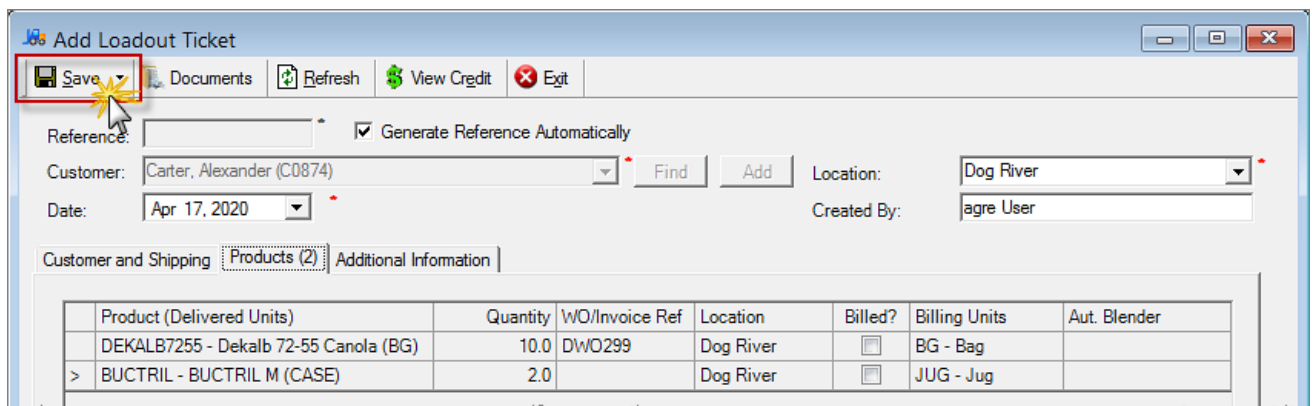
eConfirmations can be sent on the fly in real time as the transaction happens, or manually after the fact.

Sending an **eConfirmation** creates a new row in the [eConfirmation home form](#) with a **Status** of **Pending** (so if you send more than one, there will be more than one row in the grid).

Add and save a Work Order, Loadout Ticket, or Invoice like you normally would.

On the Fly with Prompt on Save

Every time you **Save** ...



Add Loadout Ticket

Save Documents Refresh View Credit Exit

Reference: [Field] ☒ Generate Reference Automatically

Customer: Carter, Alexander (C0874) Find Add Location: Dog River

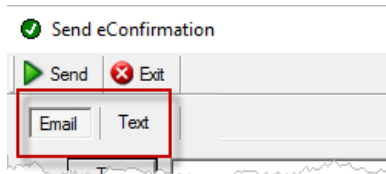
Date: Apr 17, 2020 Created By: agre User

Customer and Shipping Products (2) Additional Information

Product (Delivered Units)	Quantity	WO/Invoice Ref	Location	Billed?	Billing Units	Aut. Blender
DEKALB7255 - Dekalb 72-55 Canola (BG)	10.0	DWO299	Dog River	☐	BG - Bag	
> BUCTRIL - BUCTRIL M (CASE)	2.0		Dog River	☐	JUG - Jug	

Accounts Receivable > Loadout Tickets

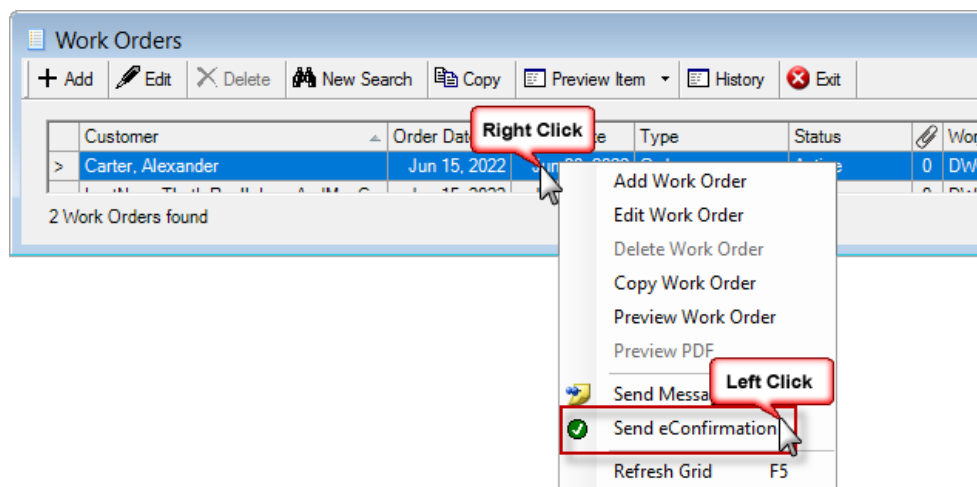
... you'll be prompted automatically to **Send an eConfirmation** to the customer by either **Email** or **Text** (but not both at the same time).



agrē will remember the eConfirmation **Type** for this customer to use for next time.

Manually (Prompt on Save not checked)

Right-click on the transaction and select **Send eConfirmation**.



Accounts Receivable > Loadout Tickets

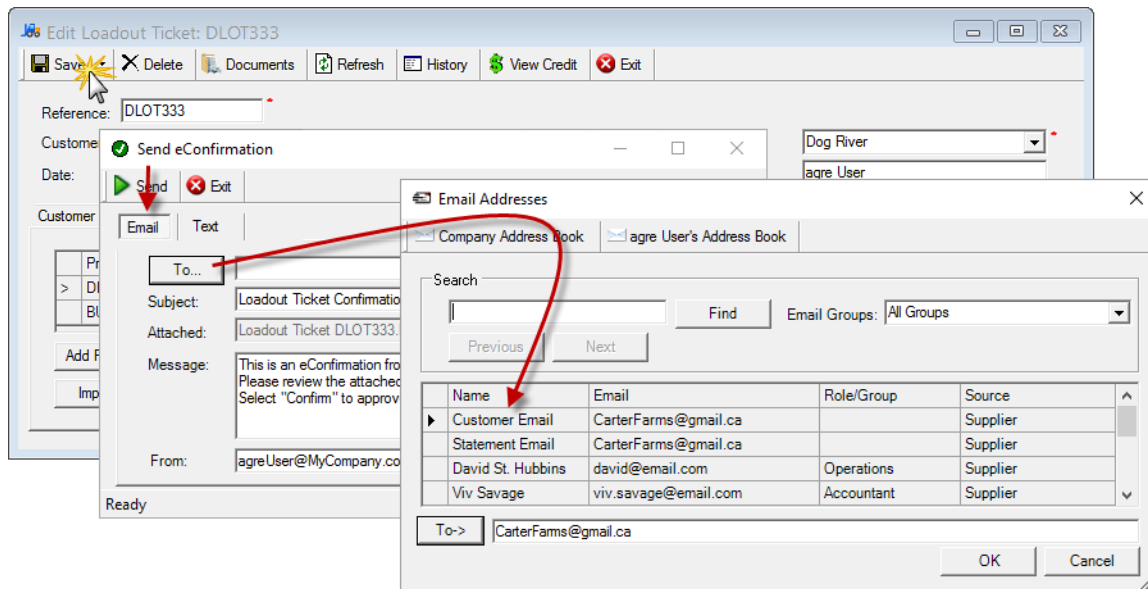
Text or Email?

Sending eConfirmation by Email

On first use the **Email** tab is selected by default. When you click **Send**, you will be sending an email.

The **subject** line defaults to: [Transaction] Confirmation for [Reference Number].
e.g. Loadout Ticket Confirmation for DLOT333

The last address used to email an eConfirmation to this customer is displayed by default in the **To** field, but it can be changed. Manually type a different address, or click [**To ...**] to open **agre's Address Book** and select a different address from the customer's account.



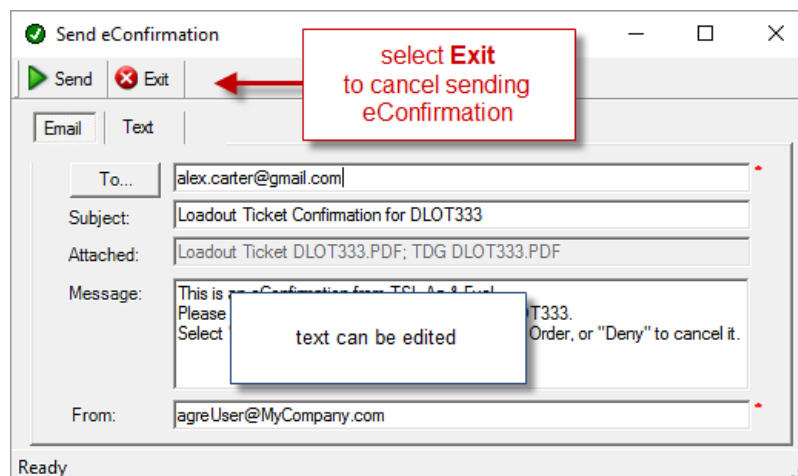
only contacts with an email address are listed

Tip

You would normally **send the eConfirmation to ONE email address only** - sending to multiple addresses would allow *any* of the recipients to Confirm or Deny the transaction.

If the transaction (Loadout Ticket and AR Invoice only) is configured to include the **TDG report**, it will be attached to the email automatically.

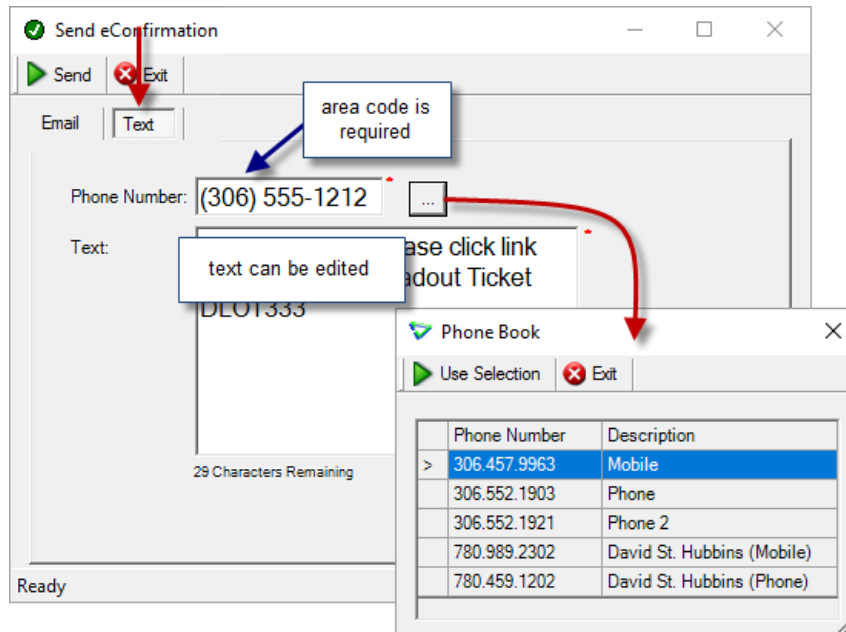
If you don't want to send an eConfirmation at this time, just click **Exit**. Every time you save, you'll get another offer to send one.



Sending eConfirmation by Text

Select the **Text** tab. When you click **Send**, you will be sending a text message.

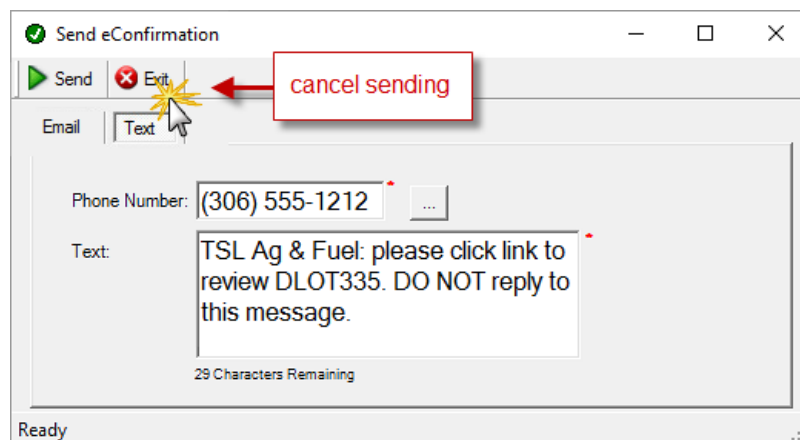
The last phone number used to text an eConfirmation to this customer is displayed by default in the **Phone Number** field, but it can be changed. Manually type a different phone number, or click the ellipsis button [...] to open agrē's **Phone Book** and select a different number from the customer's account.



sending by text requires a 10 digit phone number
only contacts with a phone number are listed

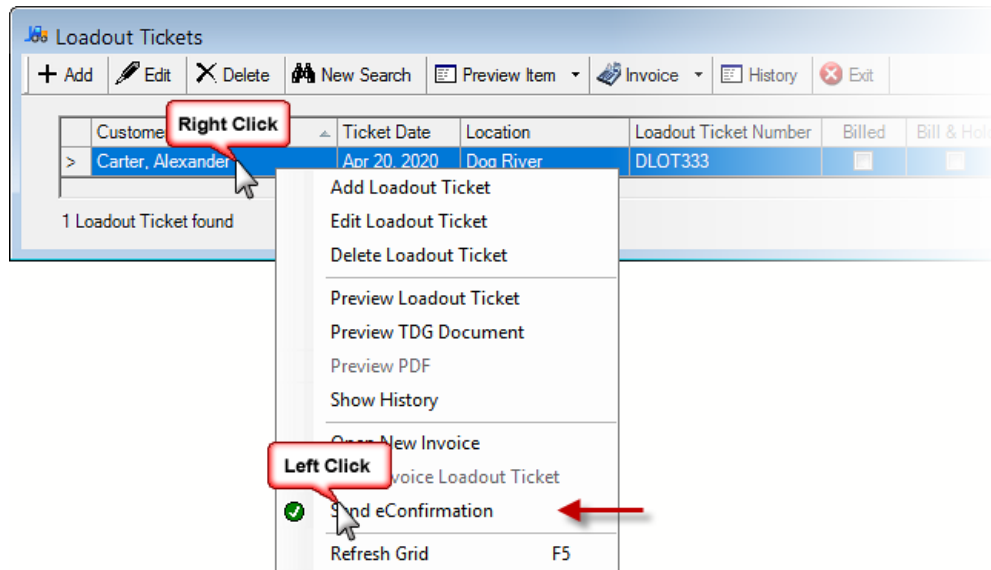
A link to view the **eConfirmation** will be appended to the text message as it is sent.

You'll be prompted to send an eConfirmation each time you save.
If you don't want to send one at this time, just click **Exit**.



Sending eConfirmation Manually from the Home Form

Normally an eConfirmation is sent at the time the transaction is saved, but you can send one at any time from the respective home form (Work Order, Loadout Ticket, AR Invoice).



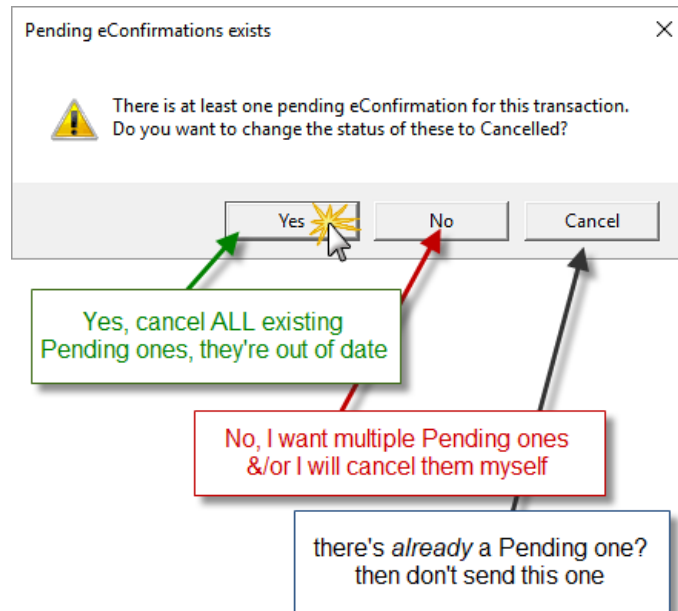
Account Receivable > Loadout Tickets (or Work Orders or Invoices)

This will send a new eConfirmation. Even if an eConfirmation was already sent previously, a new pending one will be generated and sent.

Sent eConfirmations

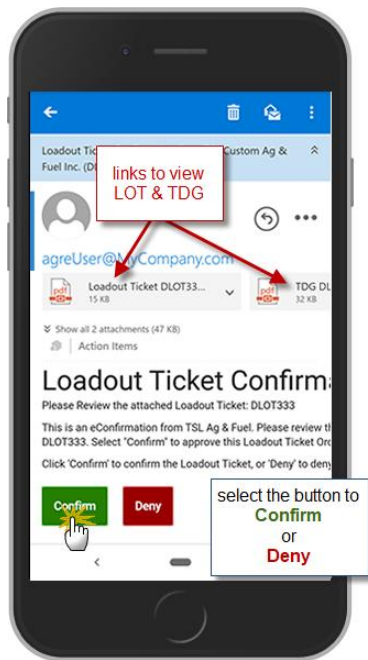
All eConfirmations are sent with a **Status** of **Pending**.

If there is **already** a **pending** eConfirmation (or more than one) and you send another, agrē will prompt you to **cancel** the **existing** pending one(s) so there is no confusion on the customer's part as to which iteration they should Confirm or Deny - it should always be the most recent one.



It's best to have just **one Pending eConfirmation for each transaction**, or your grower may be confirming/denying one that is out of date. (you can cancel them manually too - we'll talk more about that in the [Editing eConfirmations](#) section)

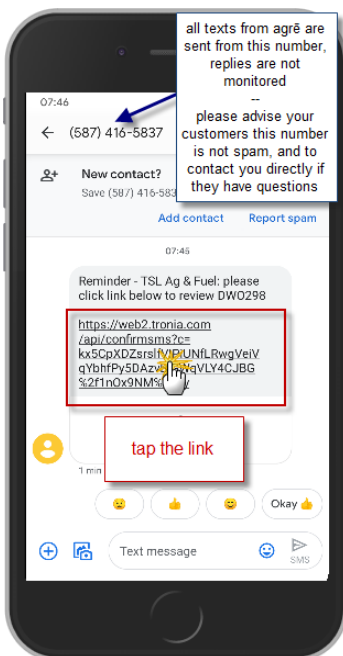
Customer Confirmation/Denial



sample confirmation email

If the customer received an email, they click either **Confirm** or **Deny**.

The “**From**” address will be what you set at the User or Company level.

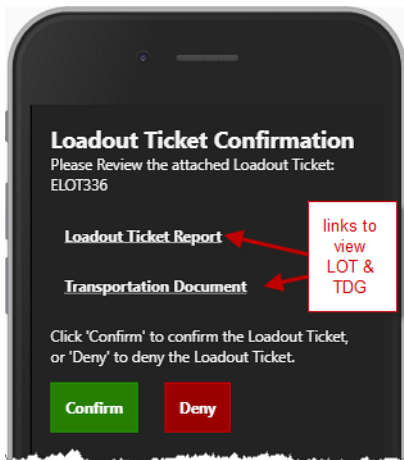


sample confirmation text

If the customer received a text message, they select the included link.

Tronia has reserved several phone numbers for texting. All eConfirmation texts will be sent from one of the following numbers:

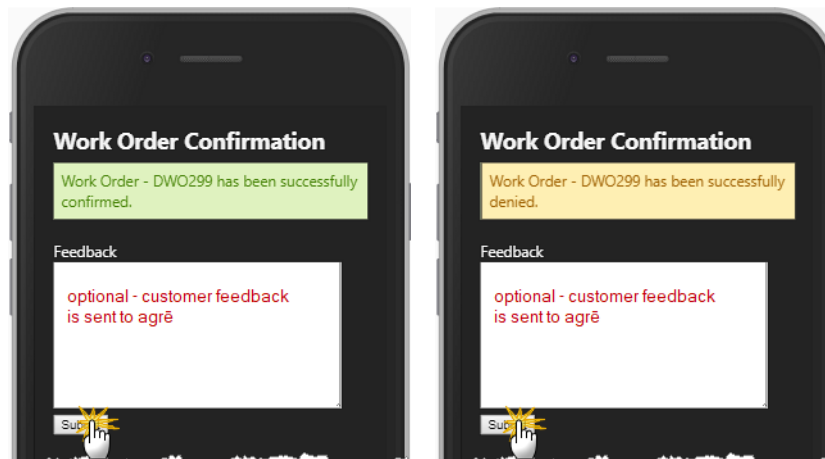
- 1.306.985.0099
- 1.306.985.9002
- 1.431.301.4834
- 1.587.805.2080



The confirmation webpage opens and they have a link to view each report, and to the usual options - **Confirm** or **Deny**.

For both email and text: as soon as a choice is made, the response is sent to agrē.

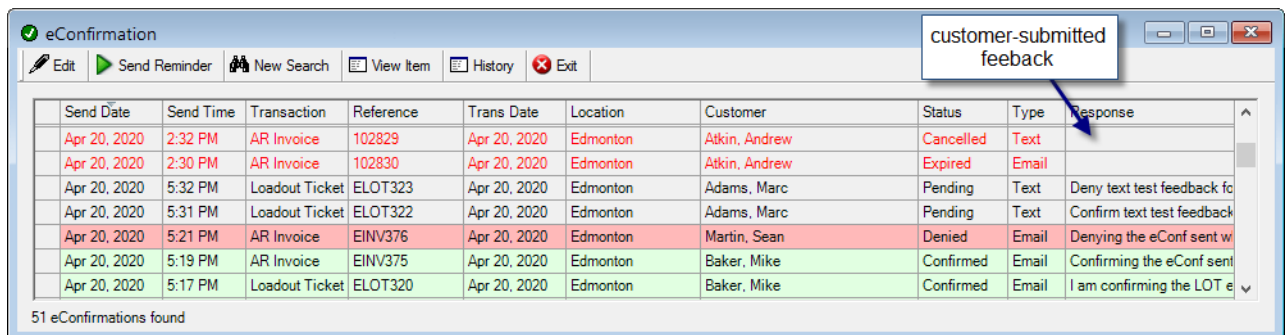
After the customer makes their selection, a **Confirmation** page is displayed that allows them to send you additional **Feedback**.



Managing eConfirmations



An **eConfirmation** record is created automatically each time a confirmation is sent. Existing eConfirmations can be edited, but new ones cannot be added manually.



Send Date	Send Time	Transaction	Reference	Trans Date	Location	Customer	Status	Type	Response
Apr 20, 2020	2:32 PM	AR Invoice	102829	Apr 20, 2020	Edmonton	Atkin, Andrew	Cancelled	Text	
Apr 20, 2020	2:30 PM	AR Invoice	102830	Apr 20, 2020	Edmonton	Atkin, Andrew	Expired	Email	
Apr 20, 2020	5:32 PM	Loadout Ticket	ELOT323	Apr 20, 2020	Edmonton	Adams, Marc	Pending	Text	Deny text test feedback fo
Apr 20, 2020	5:31 PM	Loadout Ticket	ELOT322	Apr 20, 2020	Edmonton	Adams, Marc	Pending	Text	Confirm text test feedback
Apr 20, 2020	5:21 PM	AR Invoice	EINV376	Apr 20, 2020	Edmonton	Martin, Sean	Denied	Email	Denying the eConf sent w
Apr 20, 2020	5:19 PM	AR Invoice	EINV375	Apr 20, 2020	Edmonton	Baker, Mike	Confirmed	Email	Confirming the eConf sent
Apr 20, 2020	5:17 PM	Loadout Ticket	ELOT320	Apr 20, 2020	Edmonton	Baker, Mike	Confirmed	Email	I am confirming the LOT e

51 eConfirmations found

Accounts Receivable > eConfirmations

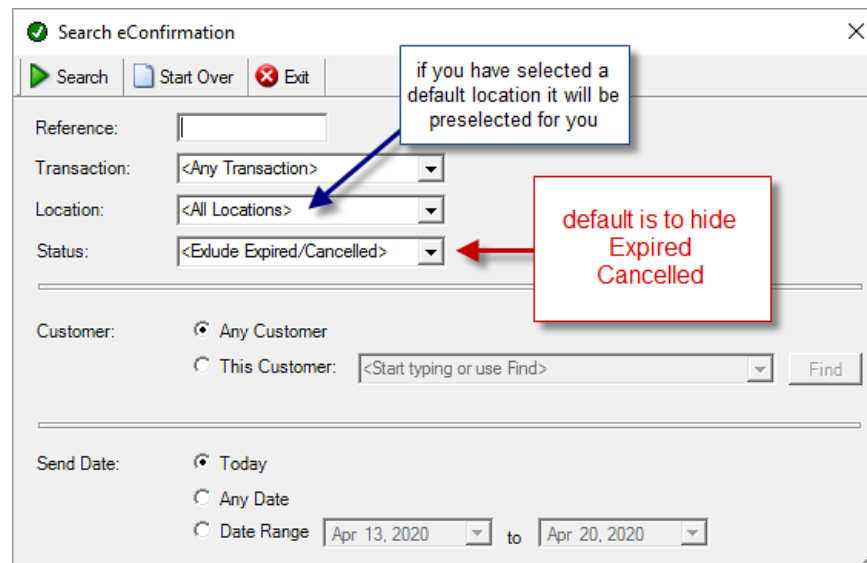
The grid is color-coded based on the eConfirmation **Status**:

- Pending
- Confirmed
- Denied
- Cancelled/ Expired

This quickly identifies the status of each eConfirmation.

Search form

Search for eConfirmations using attributes to filter the results.



Search eConfirmation

Search Start Over Exit

Reference:

Transaction:

Location:

Status:

Customer: ☒ Any Customer ☐ This Customer: Find

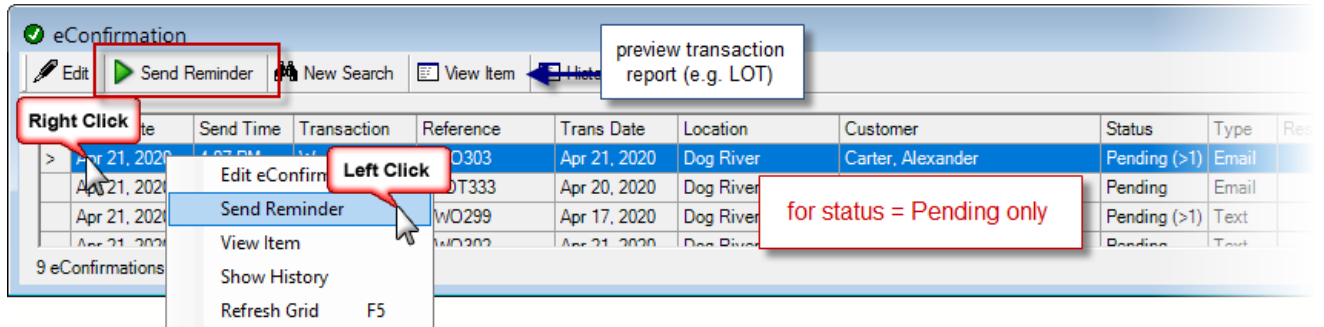
Send Date: ☒ Today ☐ Any Date ☐ Date Range to

if you have selected a default location it will be preselected for you

default is to hide Expired Cancelled

Sending Reminders

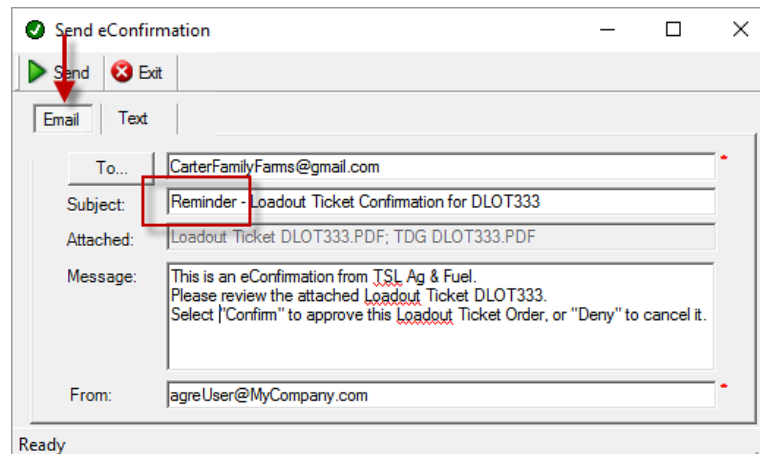
Reminders can be sent for **pending** eConfirmations. A reminder sends the *same* eConfirmation to the recipient (or a different recipient). When the reminder is sent the **Send Date/Time**, **Recipient**, and **Type** are updated. Multiple reminders can be sent.



Accounts Receivable > eConfirmation

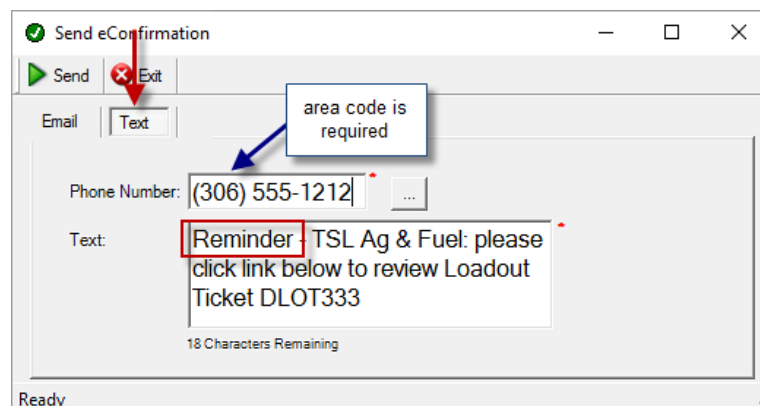
The important thing to remember is sending a *Reminder* updates an *existing* eConfirmation, it doesn't create a new one.

If sent by **email**, the Subject is the same as the original prefaced by "Reminder".



the Reminder can be sent via email or text

If sent by **text**, the text is the same as the original prefaced by "Reminder".

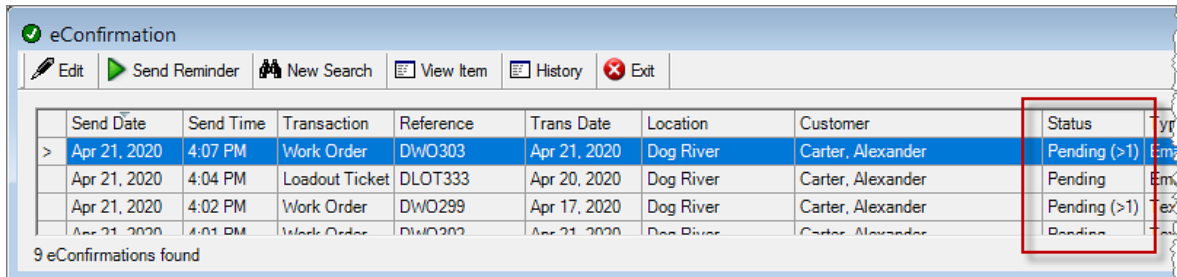


sending by text requires a 10 digit phone number

Editing eConfirmations

Although **eConfirmations** can't be *added* manually, the **Status** can be *edited*. If the eConfirmation you want to edit is not displayed by default, change the **Search** criteria to include it. You may need to expand the date range for the **Send Date** depending on when it was sent.

If a transaction has more than one **Pending** eConfirmation, the **Status** will let you know.

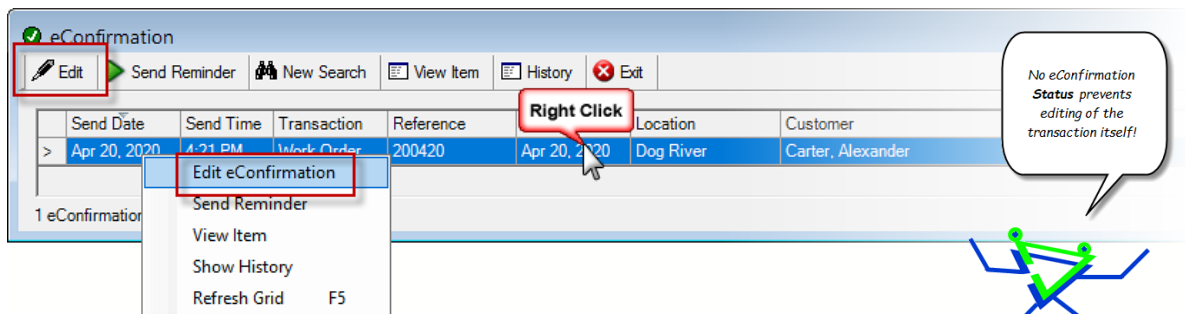


Send Date	Send Time	Transaction	Reference	Trans Date	Location	Customer	Status
> Apr 21, 2020	4:07 PM	Work Order	DWO303	Apr 21, 2020	Dog River	Carter, Alexander	Pending (>1)
Apr 21, 2020	4:04 PM	Loadout Ticket	DLOT333	Apr 20, 2020	Dog River	Carter, Alexander	Pending
Apr 21, 2020	4:02 PM	Work Order	DWO299	Apr 17, 2020	Dog River	Carter, Alexander	Pending (>1)
Apr 21, 2020	4:01 PM	Work Order	DWO303	Apr 21, 2020	Dog River	Carter, Alexander	Pending

9 eConfirmations found

Accounts Receivable > eConfirmation

Since you no longer want the customer to respond to an old eConfirmation request, it should be **cancelled**.

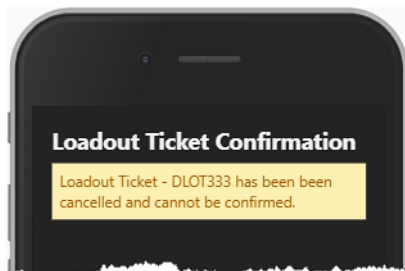


Accounts Receivable > eConfirmations

Change the **Status**, add the reason to the **Internal Notes**, and **Save**.

Send Date: Apr 20, 2020
 Send Time: 4:21 PM
 Reference: 200420
 Transaction: Work Order
 Trans Date: Apr 20, 2020
 Location: Dog River
 Recipient: CarterFamilyFams@gmail.com
 Customer: Carter, Alexander (C0874)
 Phone: 306.552.1903
 Mobile: 306.457.9963
 Phone 2: 306.552.1921
 Fax: 306.227.2246
 Username: agre User
 Status: Pending
 Response Date: Pending
 Confirmed
 Denied
 Cancelled
 Expired
 Responded By:
 Response Notes:
 Internal Notes: a reason is required when Status is changed

Accounts Receivable > eConfirmation > Edit



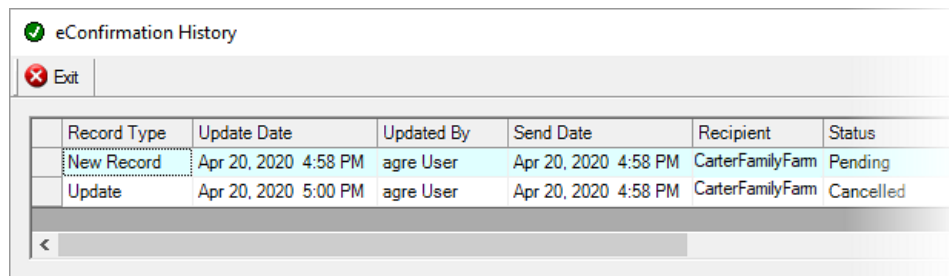
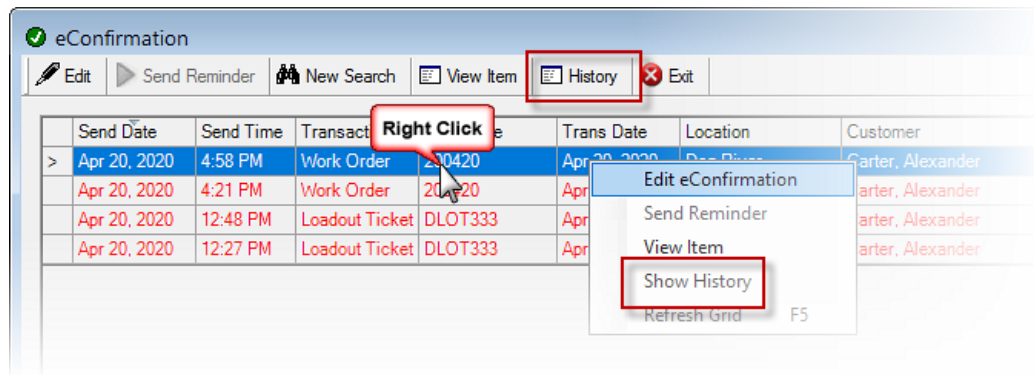
The customer will still have received the **eConfirmation**, but they can ignore it as a cancelled one cannot be confirmed or denied.

(they'd get a similar message if they tried to Confirm or Deny an expired one too)

Cancelled eConfirmations are not displayed by default. Change the Search **Status** to **<Any Status>** or to **Cancelled**.

Search eConfirmation
 Reference:
 Transaction: <Any Transaction>
 Location: <All Locations>
 Status: <Exclude Expired/Cancelled>
 Customer:
 Find

You can view the **History** of any eConfirmation (keep in mind a transaction may have multiple eConfirmations, so a single one may not include the entire history of the transaction).



eConfirmation Reports and Exports

Data Exports

- ✓ Audit/Admin: eConfirmation – Invoices
- ✓ Audit/Admin: eConfirmation – Loadout Tickets
- ✓ Audit/Admin: eConfirmation – Work Orders