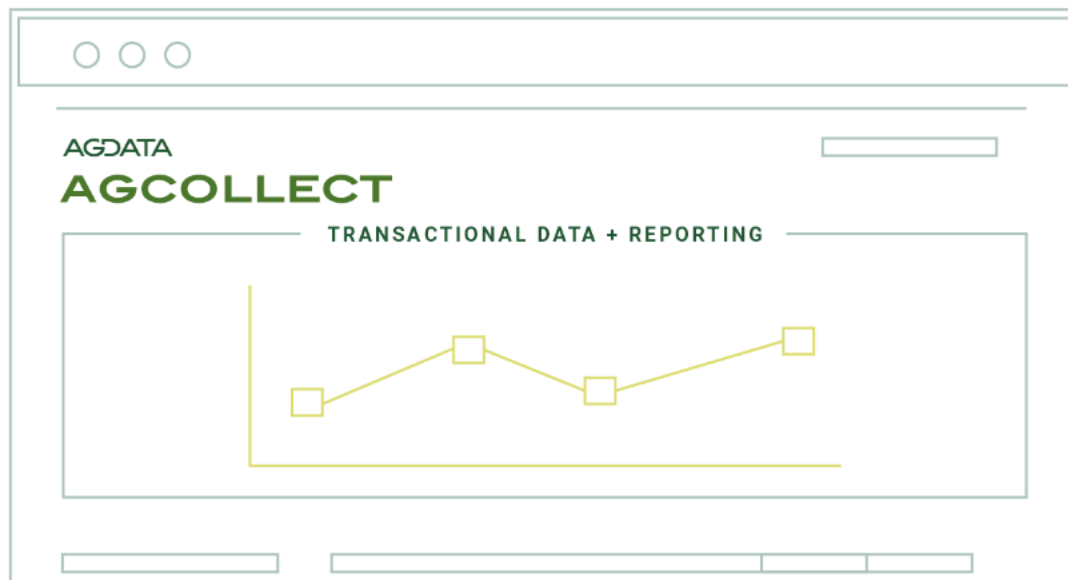


AGDATA SETUP AND EXPORTS



If your company provides sales information to **AGDATA**, you can easily export and email what you have recorded already in agré. The **AGDATA Exports** includes sales (on invoices and sales-to-be on work orders) to eligible customers and inventory position of products flagged as “AGDATAble”.

Please contact AGDATA directly with any reporting concerns or questions.

Email: agcollect_support@agdata.com

Phone: 1-888-532-5666

Website: <https://www.agdata.com/>

What you'll find:

How does agrē know what sales information to include?	2
Setting Up Config Options	3
Setting Up AGDATA Manufacturers	4
Setting Up AGDATA Product Types	5
Setting Up AGDATA Products	5
Excluding Sales Data for Specific Customers	6
Combining Sales Data from Multiple Customers	7
Manually Exporting & Emailing AGDATA	8

How does agrē know what sales information to include?

agrē knows what **products** AGDATA are interested by their **Manufacturer** or **Product Type**.

Data only for products flagged with AGDATA will be exported.

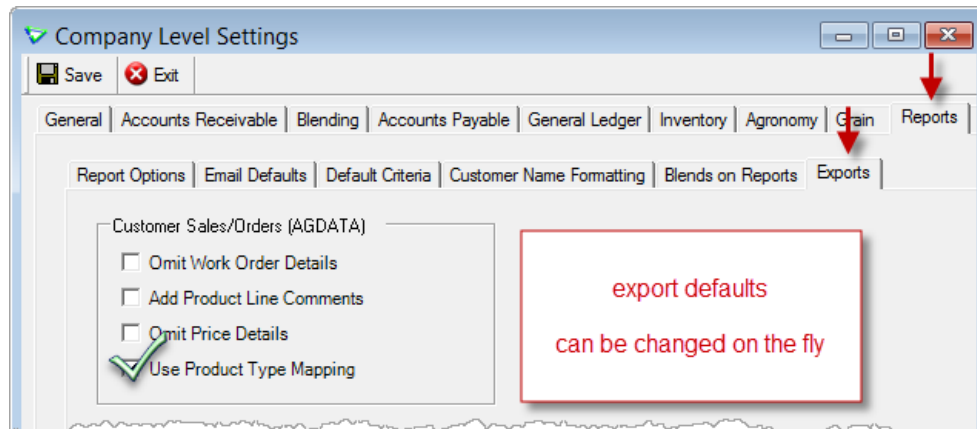
By default, agrē will export data of AGDATA products sold to and ordered by *all* **customers** (unless they've been manually **excluded** from reporting).

Sales for multiple customers can be combined by setting up **Customer Associations**.

Setting Up Config Options

Company Config Options

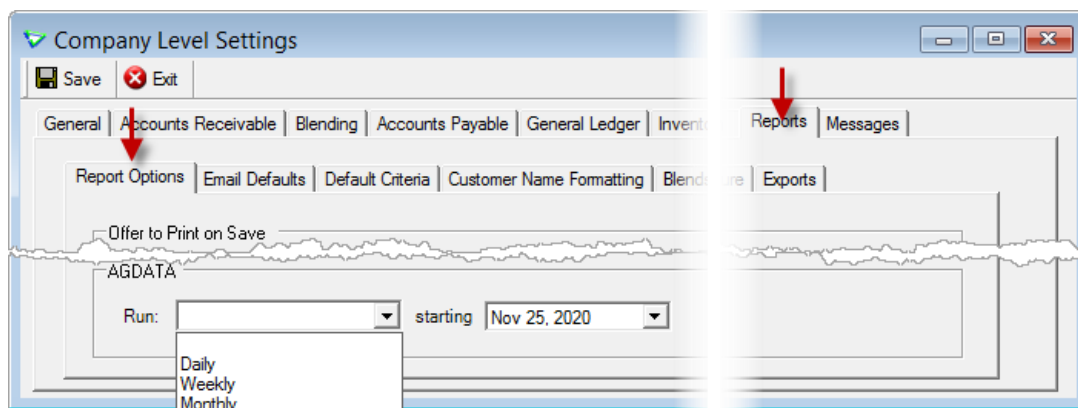
Set the default **Customer Sales/Orders (AGDATA)** exports options.
(these are just defaults - you can change them when actually exporting the data)



File > Config Options > Company

- (optional) Check **Omit Work Orders** to exclude both *Work Orders - Early Booking* [committed but not prepaid] and *Work Orders - Prepay* [committed and prepaid]..
- (optional) Check **Add Product Line Comments** to include Invoice product row comments.
- (optional) Check **Omit Price Details** to exclude pricing.
- Check **Use Product Type Mapping*** to use AGDATA product types.
(see [Setting Up AGDATA Product Types](#) on page 5 and [AGDATA-Inventory Position Export](#) on page 9)

agrē can submit exports automatically to AGDATA.
(if your retail data isn't submitted automatically via agrē Hub)



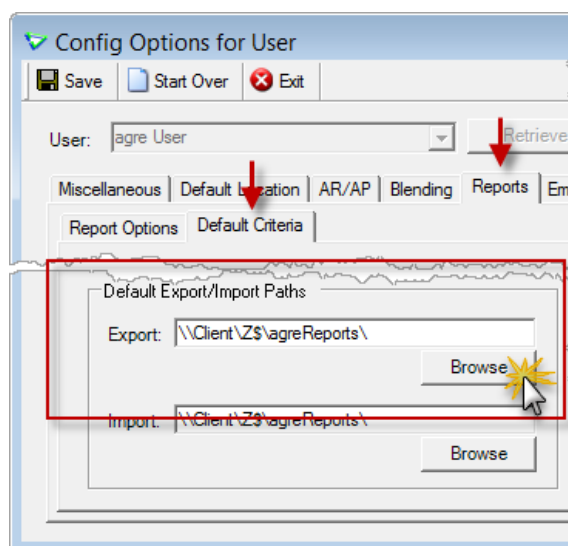
File > Config Options > Company

- Contact your CSC to initiate automatic AGDATA submissions.
- Choose how often to **Run** and submit data, and the **starting** date.

User Config Options

Select a **Default Export Path** for the exported data files.

You can always change the destination on the fly if you want to export to a different path.



File > Config Options > User

Help

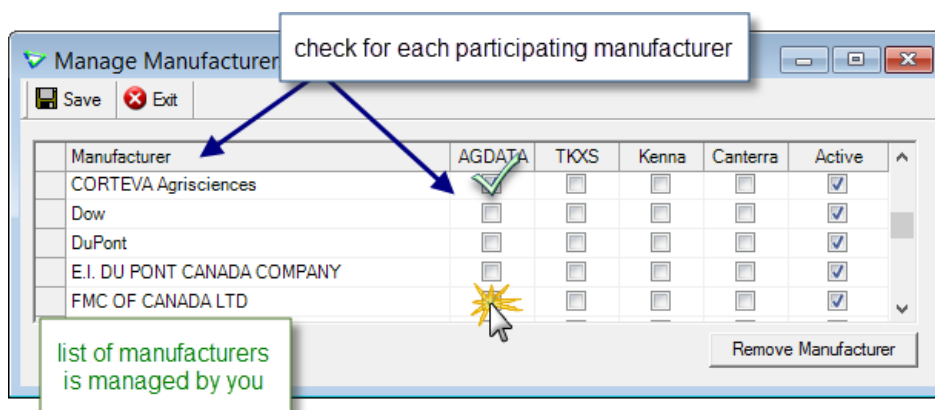
Please refer to **File > Exports > Data Exports > Hosted Users: Selecting a Destination for Exported Files** in online Help for more information about choosing a destination folder when exporting data. It must be available *outside* of agre.

Setting Up AGDATA Manufacturers

Please review participating manufacturers with your AGDATA Rep or the [AGDATA](#) website.

Start by confirming your list of **Manufacturers** is accurate.

Each participating manufacturer needs to be flagged as an **AGDATA** manufacturer.



Inventory > Manage > Manufacturers

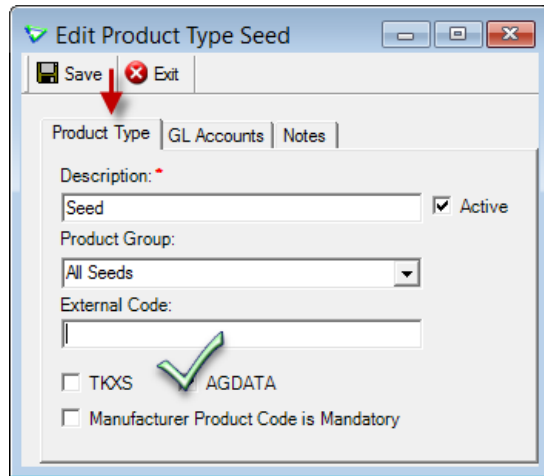
Note

You can spell the **Manufacturer** name however you like.

Setting Up AGDATA Product Types

Check **AGDATA** for **Product Types** that are reported.

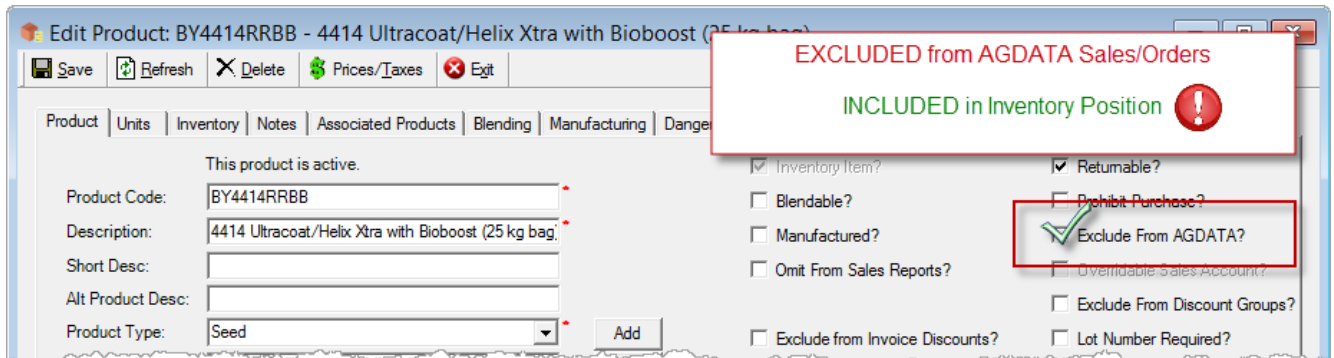
Ensure [company config option Use Product Type Mapping](#) is checked.



Inventory > Manage > Product Types

Setting Up AGDATA Products

If *not* included in an AGDATA product type, each reportable product must be tagged individually with an AGDATA manufacturer to have its sales included.



Inventory > Manage > Products

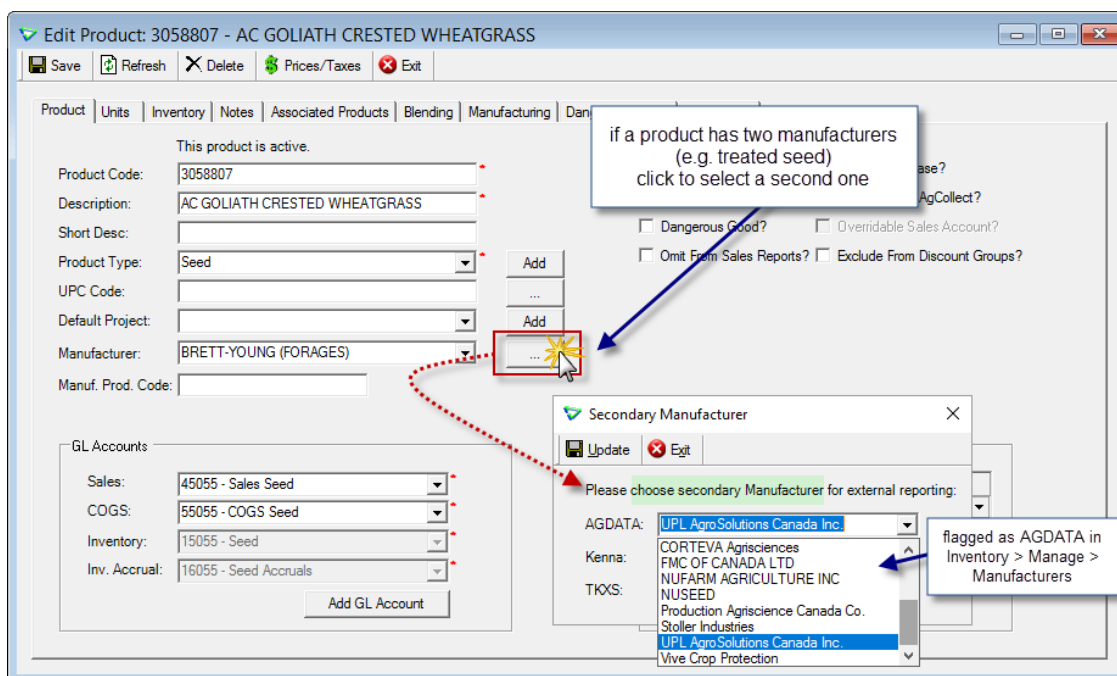
Excluding Sales Data for Specific Products

Check **Exclude from AGDATA?** for products from AGDATA Manufacturers or AGDATA Product Types that do *not* need to be included in Sales/Orders export. Examples are bagging fees, or demo seed, or last year's chemical.

CAUTION The AGDATA Inventory Position export ignores Exclude. The product *will* be included in the inventory position export. Change to a non-AGDATA manufacturer and/or product type to exclude from both exports.

Multiple AGDATA Manufacturers

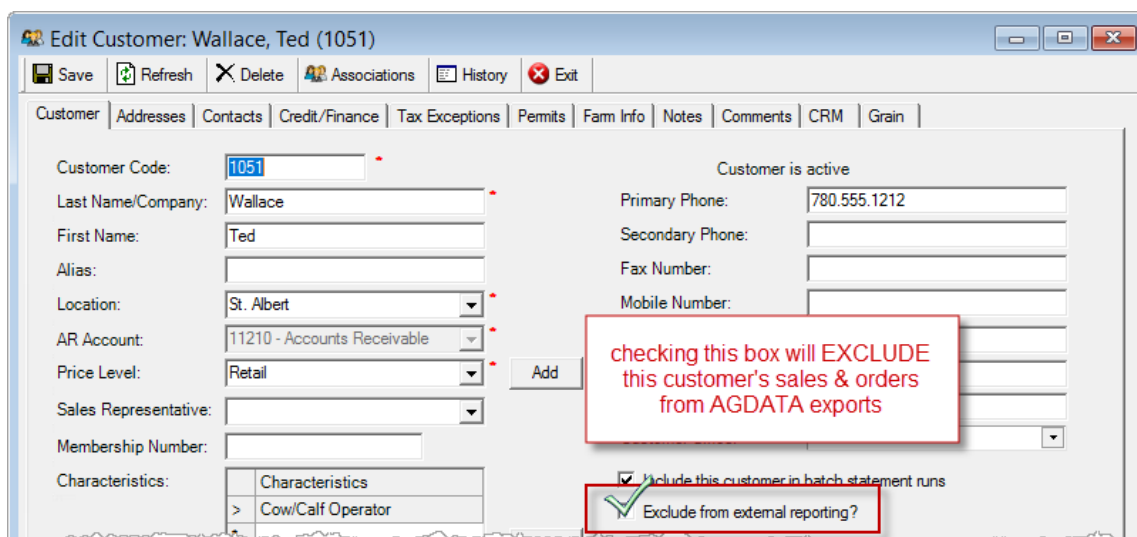
For products that have **two AGDATA manufacturers** (treated seed, for example) you can indicate the second one by clicking more options [...] next to **Manufacturer**, then selecting the 2nd one from the drop-down menu. Both manufacturers will be included in the export.



Inventory > Manage > Products

Excluding Sales Data for Specific Customers

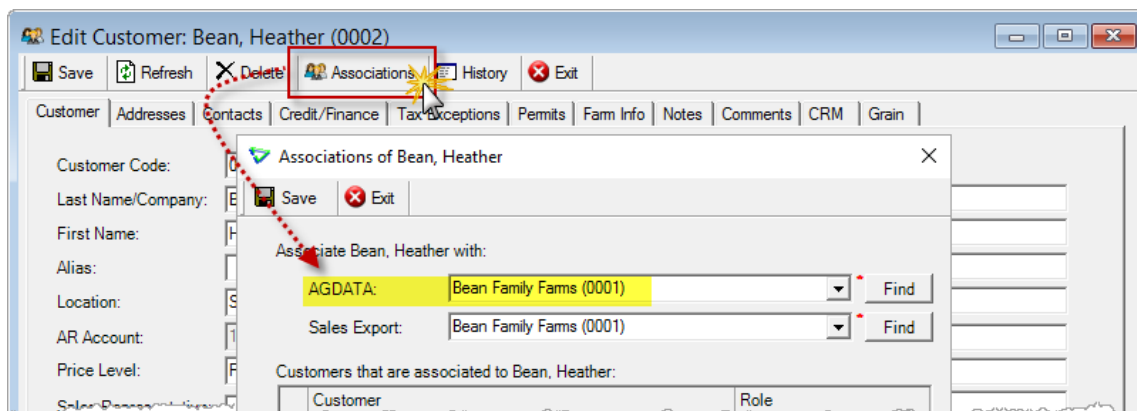
Customers whose sales data should *not* be included in AGDATA exports should be flagged as **Exclude from external reporting**.



Accounts Receivable > Manage Customers

Combining Sales Data from Multiple Customers

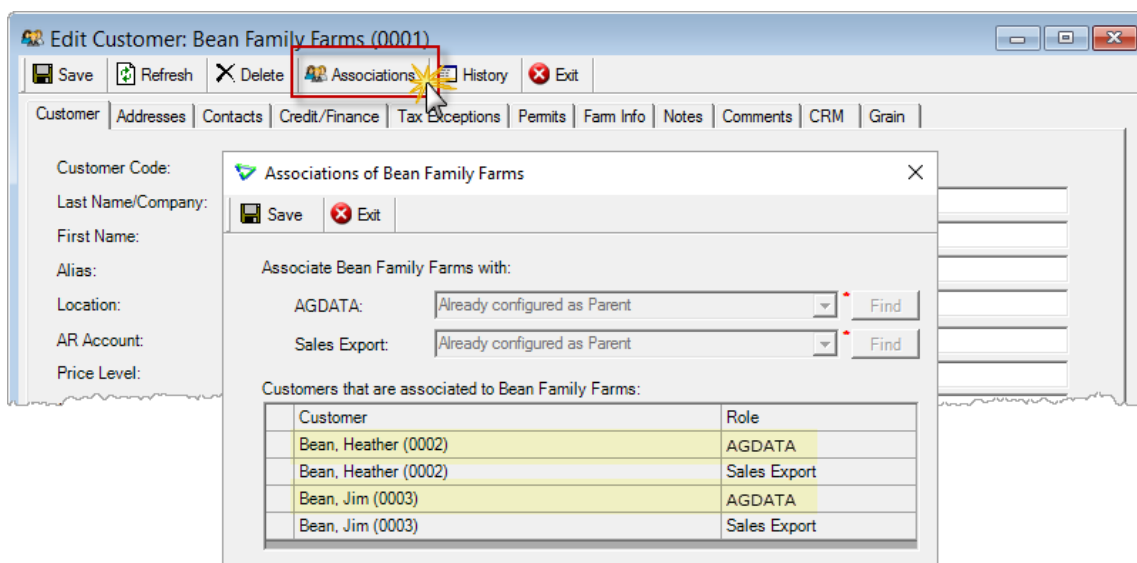
Setup customer **Associations** to combine sales results for multiple customers.



Accounts Receivable > Manage Customers

In this example, all AGDATA sales for Heather Bean will be rolled up and added to sales for Bean Family Farms.

Viewing the **Associations** for Bean Family Farms tells you whose results will be combined under that account.



Sales for Bean Family Farms *and* Heather Bean *and* Jim Bean will be combined on the exports and be reported under the name of Bean Family Farms – the parent account.

No individual sales will be reported for child accounts – so you won't see Heather's or Jim's names listed in the export files.

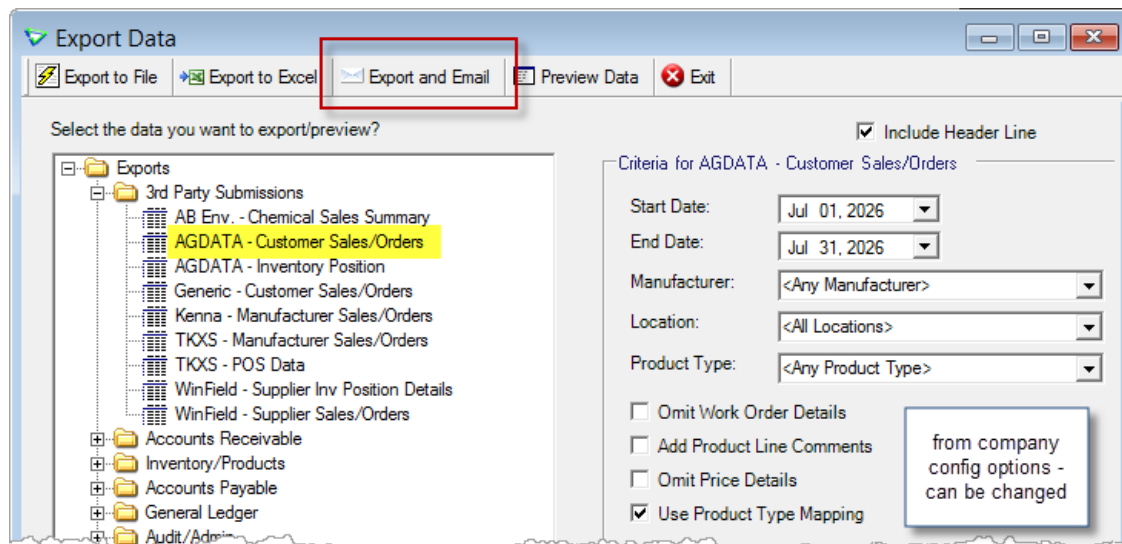
Manually Exporting & Emailing AGDATA

To export AGDATA information

- Navigate to **File > Exports > Data**.
The **Export Data** window opens.

3rd Party Submissions / AGDATA – Customer Sales/Orders

- Includes transactional data for ALL mapped AGDATA Manufacturers, or alternatively AGDATA mapped Product Types.
- Sales Rep is sourced from the transaction.
- If the customer has a permit for the product, permit reference number and expiry date are displayed.



File > Exports > Data

Note

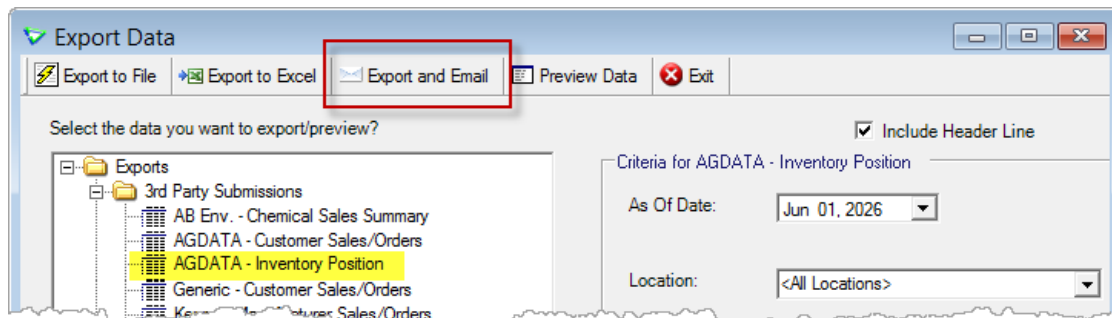
If you are using **Customer Associations**, combined sales results will be listed only under the "parent" account. Individual "child" account sales (which were rolled up to the parent account) will not be listed.

- In the **Start Date** box, optionally change the start date of the sales data you are reporting.
All sales and orders made on or after this date (up to the end date) are exported.
One month before today's date is selected by default.
- In the **End Date** box, optionally change the end date of the sales you are reporting.
All sales and orders made between the start date and this date are exported.
Today's date is the default.
- In the **Manufacturer** box, select the manufacturer of the sales you are reporting (or all manufacturers).

- In the **Location** box, select the location of the sales you are reporting (or all locations).
- In the **Product Type** box, select the product type of the sales you are reporting (or all product types).

3rd Party Submissions / AGDATA – Inventory Position

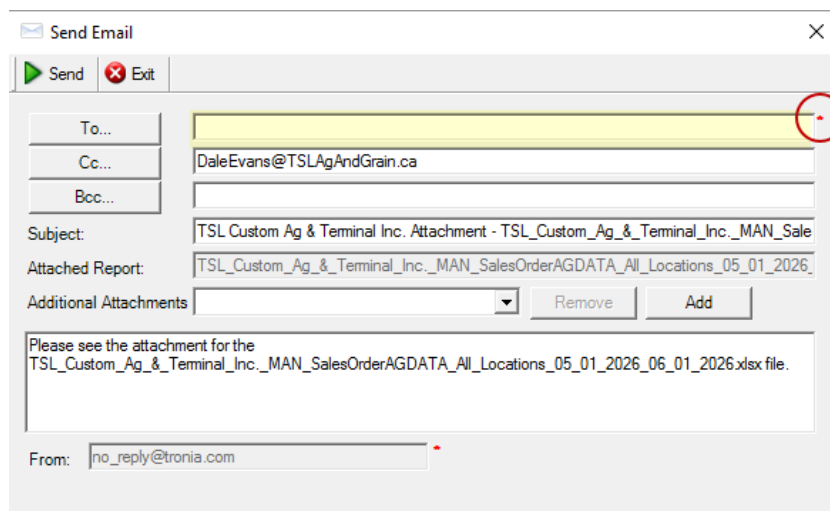
- Used for AGDATA Market Intelligence export.
- **Company Config: AGDATA – Use Product Type Mapping** *must* be checked.
- Includes Quantity on Hand amounts for products mapped to AGDATA Product Types.
- Products with QoH = 0.0 are excluded.



- In the **As Of Date** box, optionally change the start date.
- In the **Location** box, select the location (or all locations).

Export and Email

- Click **Export and Email** to email the file immediately after exporting.
- A message appears indicating the export was successful, and it asks you if you want to view the folder containing the exported file. Click **Yes** to view the file, or click **No** to close the window.
- The **Send Email** window opens.



- In the **To** box, enter the email address to which the AGDATA information should be sent. At least one recipient address is required.
- In the **CC** or **BCC** box, optionally type your own email address to send yourself a copy or a blind copy.
- The default **Subject** identifies your company and the export file name, but it can be changed.
- **Attached Report** The AGDATA export file is attached automatically.
- **Additional Attachments** Optionally click Add to attach additional files.
- In the message text box, enter any additional information you want the recipients of the message to read.
- Click **Send**.
The email is sent, the **Send Email** window closes, and you're back at the AGDATA **Export** window.
- Click **Exit** to close the window.