

Importing from Digital Ag

Use **Import Digital Ag** and turn bookings and crop records from Agrian into Quotes/Work Orders in agrē.

Create Date	Member No	Member Name	Record ID	Record Type	Expiry Date	Season	Created By	Imported
Oct 05, 2021	89474	Orlesky, Brian	20211006-03	BookingGroup		2021	Test Data	☐
> Oct 06, 2021	7526	Kleuger, Pete	20211006-01	CropRecord	Oct 31, 2021	2021	Test Data	☒
Oct 06, 2021	7526	Kleuger, Pete	20211006-02	BookingGroup	Oct 31, 2021	2021	Test Data	☐

3 Quotes found

What you'll find:

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Setup

There's a one-time task that needs to be completed before you can start importing from Digital Ag.

agré Security

Users will need permission to import.

Edit Role: Lord of the Universe				
Save Delete Exit				
Role Permissions				
Accounts Receivable Inventory Accounts Payable General Ledger Blending Agronomy Administration				
Item	Action	Allow	Deny?	
Digital AG Import	Enable on menu	☒	☐	
Discount Groups	Enable on menu	☒	☐	
	Manage	☒	☐	

File > Security > Manage Roles

Not all users may need **Digital Ag Import** permission checked, but at least one user should be allowed to perform all tasks.

Importing Digital Ag Booking and Crop Records

Importing from Digital Ag will **create one Quote/Work Order** per record.

Each Quote **may contain** one or **multiple** items.

Digital Ag records are imported from the **Import Quotes** window.

Import Quotes

Import

New Search

View Details

Exit

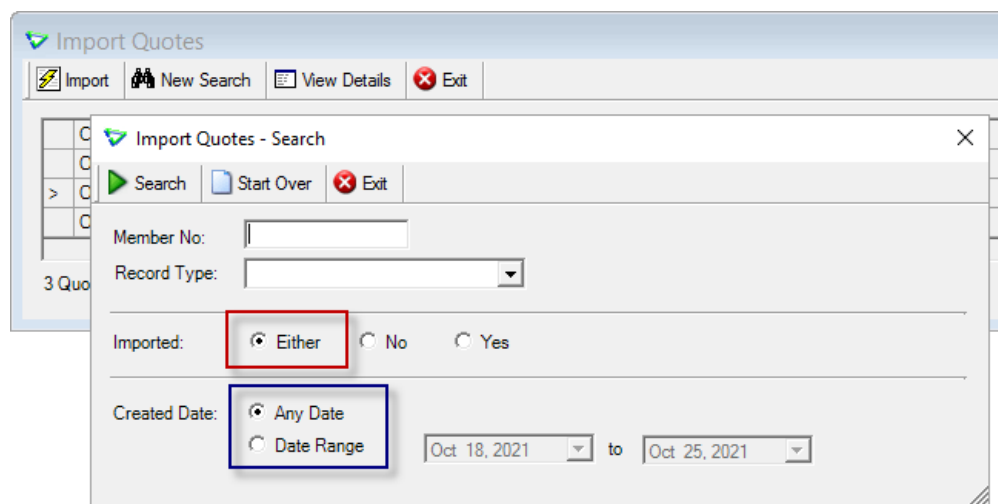
	Create Date	Member No	Member Name	Record ID	Record Type	Expiry Date	Season	Created By	Imported
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3 Quotes found

Accounts Receivable > Import Digital Ag

By default, all records that have not been imported are shown.

To view records that have already been **Imported**, change the search criteria.



Import Quotes - Search

Search Start Over Exit

Member No:

Record Type:

Imported: ☒ Either ☐ No ☐ Yes

Created Date: ☒ Any Date ☐ Date Range

Oct 18, 2021 to Oct 25, 2021

View Details

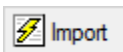
To see what is in each Digital Ag record, **View Details**.

Quote Items

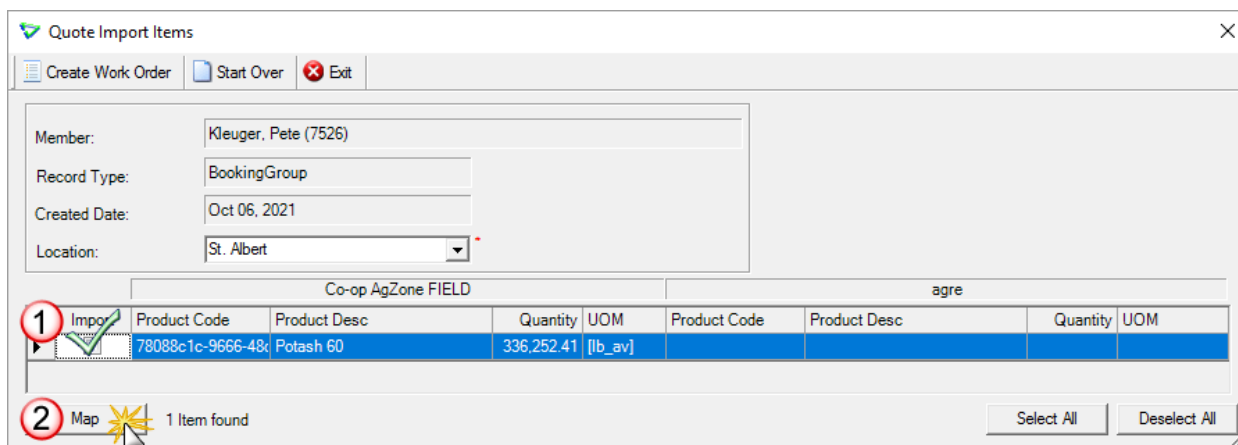
Exit

	Product Code	Product Desc	Quantity	UOM	Product Booking ID	Imported
>	3e480e0b-5ce2-42f1	Blazer	50.0	[foz_us]		☒
	fe23e678-df60-4f76	OCTTAIN XL HERBICIDE	50.0	[foz_us]		☐

2 Quote Items found



When you're ready to import, choose the record then select **Import**. If a mapped item in agrē is found, a Suggested Product will be listed. If not, the item will need to be mapped manually. Each item will need to be mapped before it can be imported.



Quote Import Items

Create Work Order Start Over Exit

Member: Kleuger, Pete (7526)
Record Type: BookingGroup
Created Date: Oct 06, 2021
Location: St. Albert

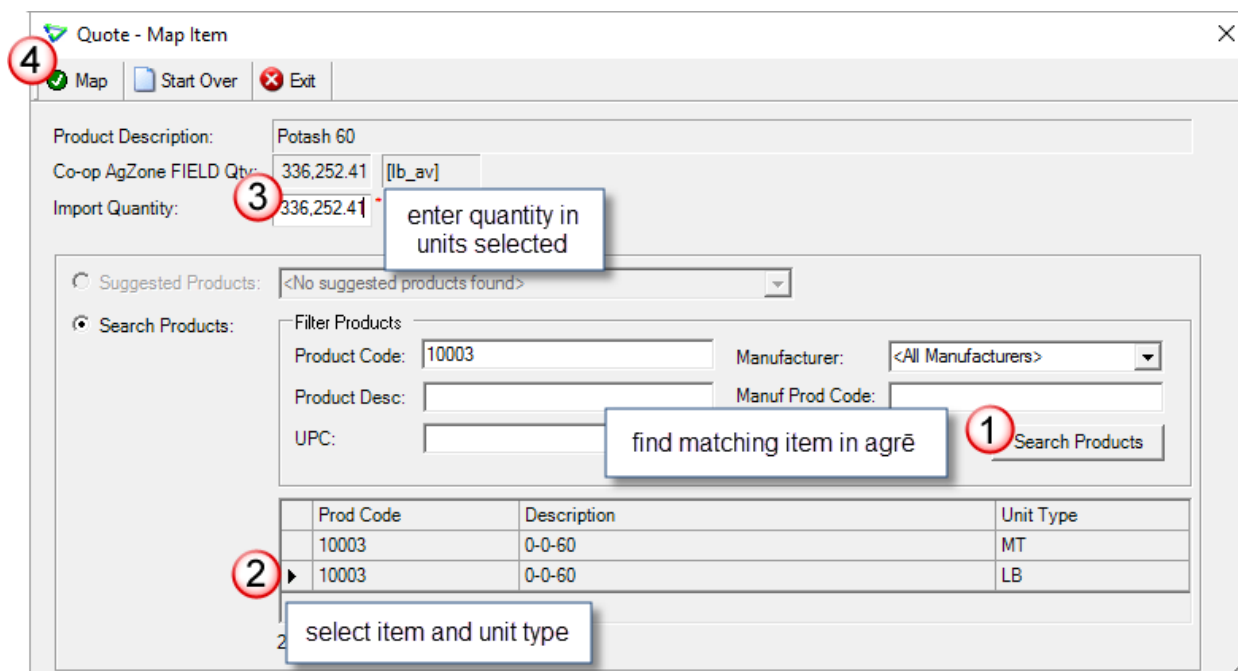
Co-op AgZone FIELD				agre			
Product Code	Product Desc	Quantity	UOM	Product Code	Product Desc	Quantity	UOM
78088c1c-9666-48c	Potash 60	336,252.41	[lb_av]				

1 Import

2 Map 1 Item found

Select All Deselect All

Use the **Filter Products** criteria to find a matching item in agrē.



Quote - Map Item

Map Start Over Exit

Product Description: Potash 60
Co-op AgZone FIELD Qty: 336,252.41 [lb_av]
Import Quantity: 336,252.41

3 enter quantity in units selected

Suggested Products: <No suggested products found>

Search Products:

Filter Products

Product Code: 10003 Manufacturer: <All Manufacturers>
Product Desc: Manuf Prod Code:
UPC:

1 Search Products

2 find matching item in agrē

Prod Code	Description	Unit Type
10003	0-0-60	MT
10003	0-0-60	LB

2 select item and unit type

The mapped item is added to the grid.
When all items to be imported are mapped, click **Create Work Order**.

Quote Import Items

Create Work Order Start Over Exit

Member: Kleuger, Pete (7526)
Record Type: BookingGroup
Created Date: Oct 06, 2021
Location: [dropdown]

items from Agrian

items added to agrē quote/work order

Co-op AgZone FIELD					agre			
Import	Product Code	Product Desc	Quantity	UOM	Product Code	Product Desc	Quantity	UOM
☒	78088c1c-9666-48	Potash 60	336,252.41	[lb_av]	10003	0-0-60	336,252.41	LB

Map 1 Item found Select All Deselect All