



FCL IMPORTING MASTERFILES

Instead of adding customers/members, suppliers/vendors, and products/items into your agrē database manually, you'll import them into agrē from the FCL mainframe via CRSH Hub.

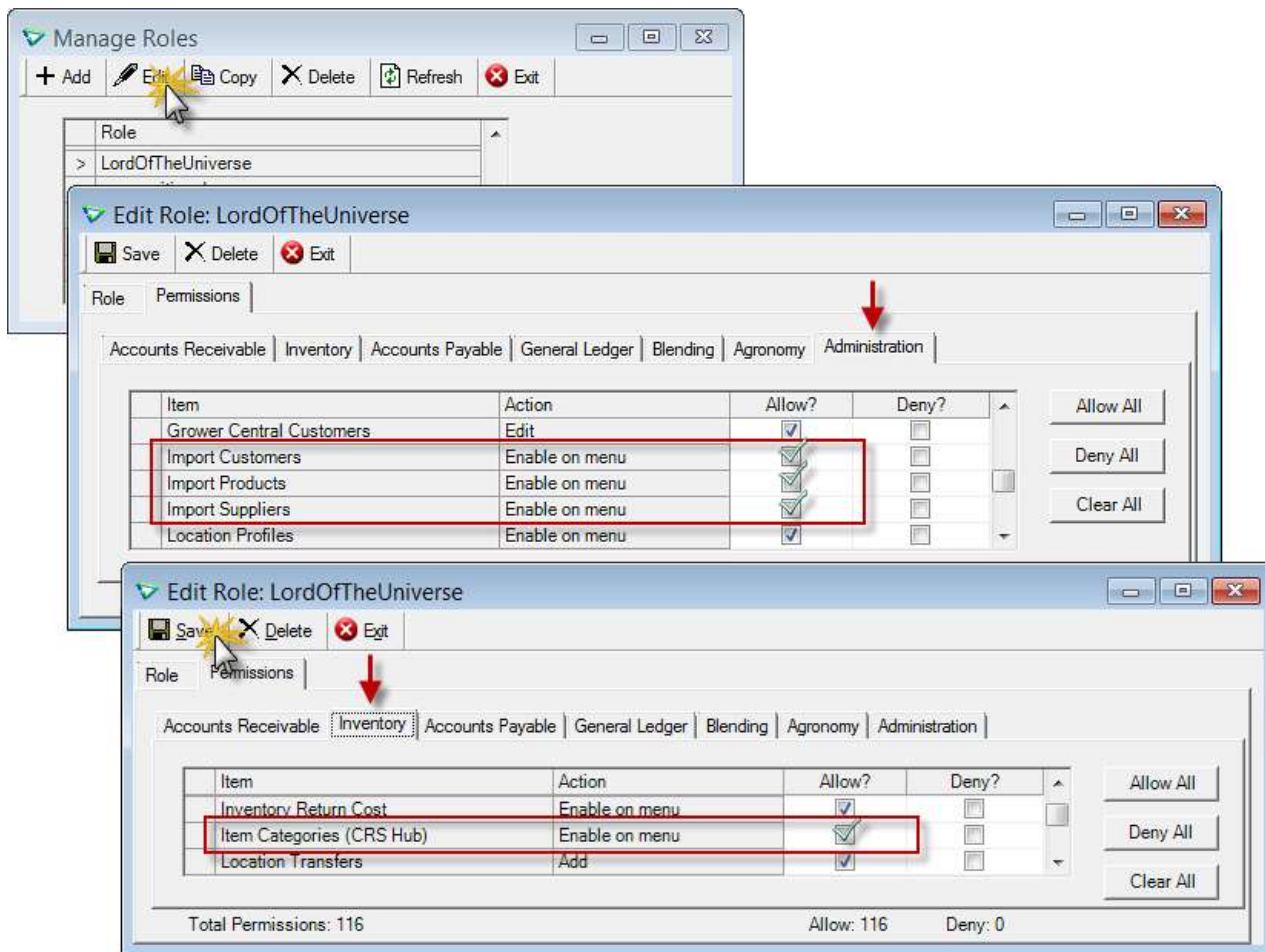
After you've imported masterfiles, all subsequent updates made to those files on the FCL mainframe are also imported automatically to agrē.

What you'll find:

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Security Permissions (one time task)

You'll need permission in agrē before you can begin importing masterfiles.



File > Security > Manage Roles

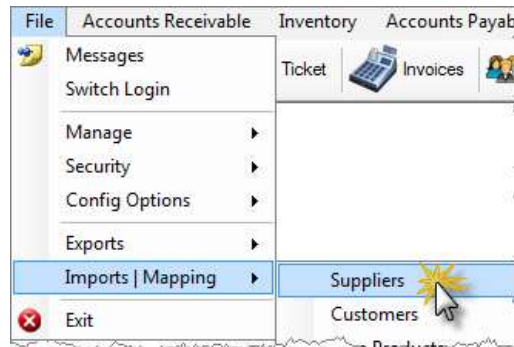
Importing Customers/Members

You don't need to do anything to import your customers/members. The first time your agrē database communicates with CRS Hub and processes the first automated Member Update, all members will be automatically downloaded into agrē.

Changes and additions made to member masterfiles on the FCL mainframe will be downloaded automatically to your agrē database.

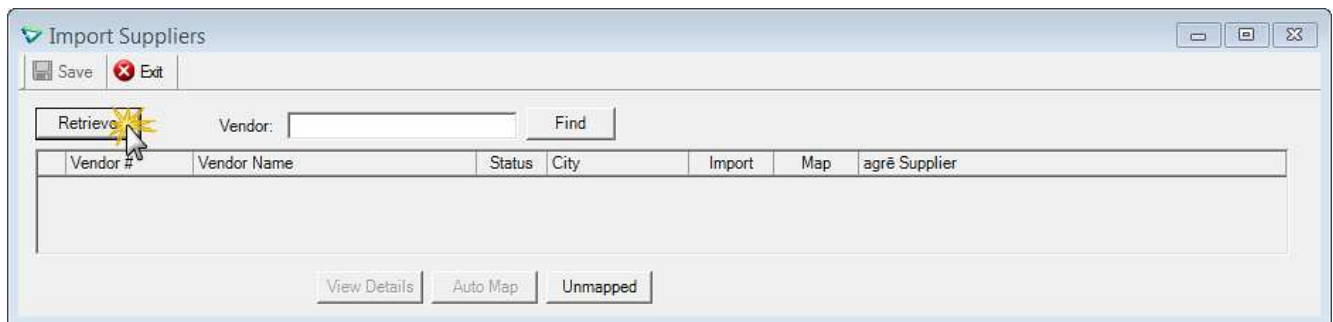
Importing Suppliers/Vendors

Start the process by navigating to:

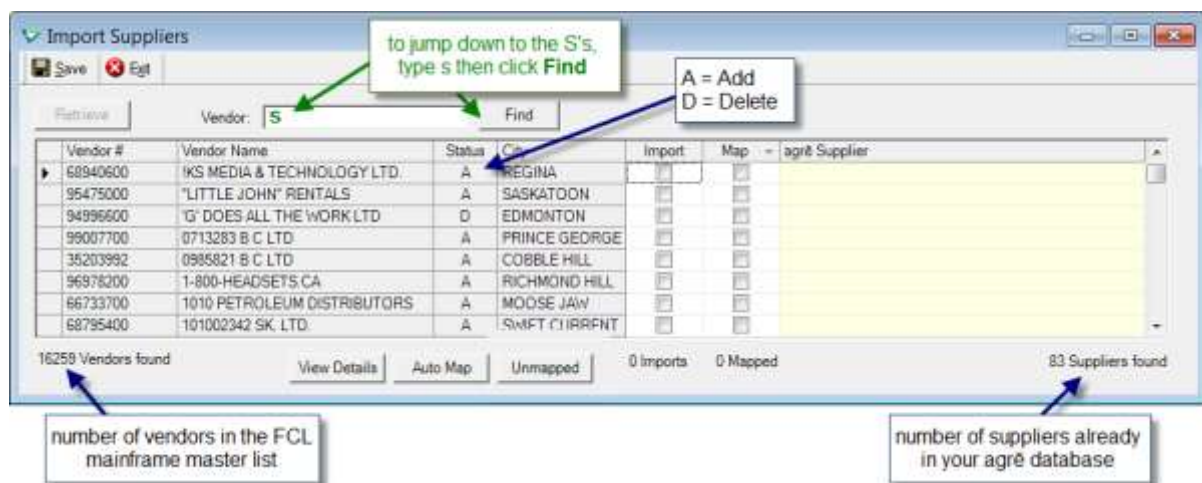


File > Imports | Mapping > Suppliers

Click **Retrieve** to view the list of FCL vendors.



On the left you'll see the list of all vendors from the FCL mainframe (every retail sees the same list of vendors) and on the right are the corresponding suppliers already imported into agrè.

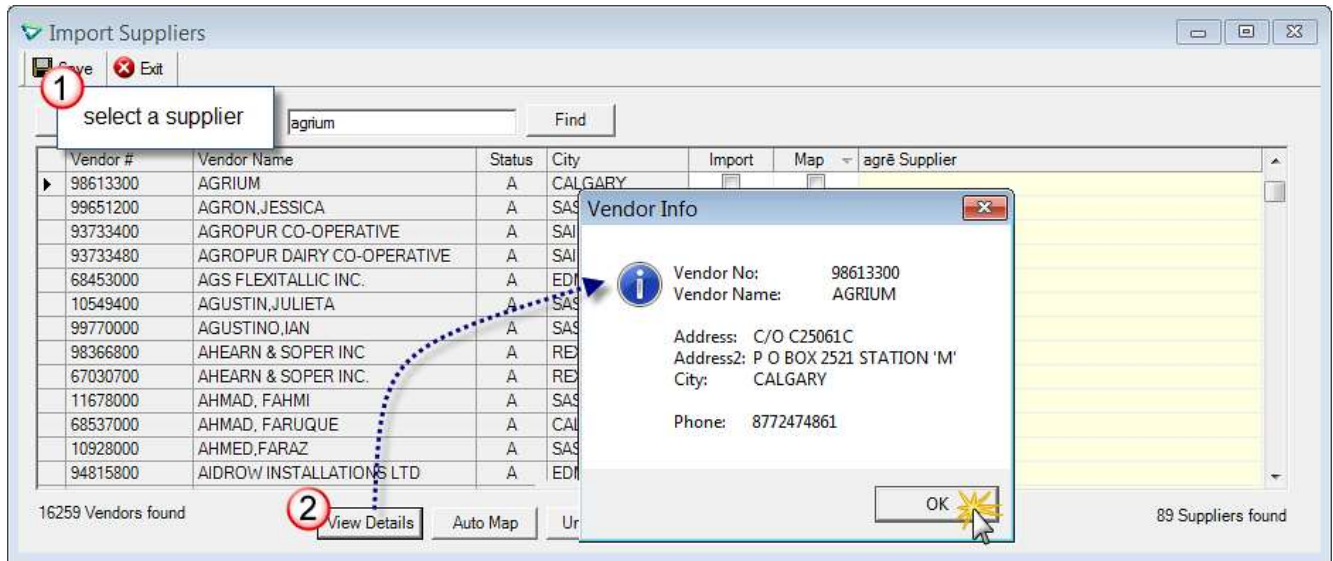


Tip

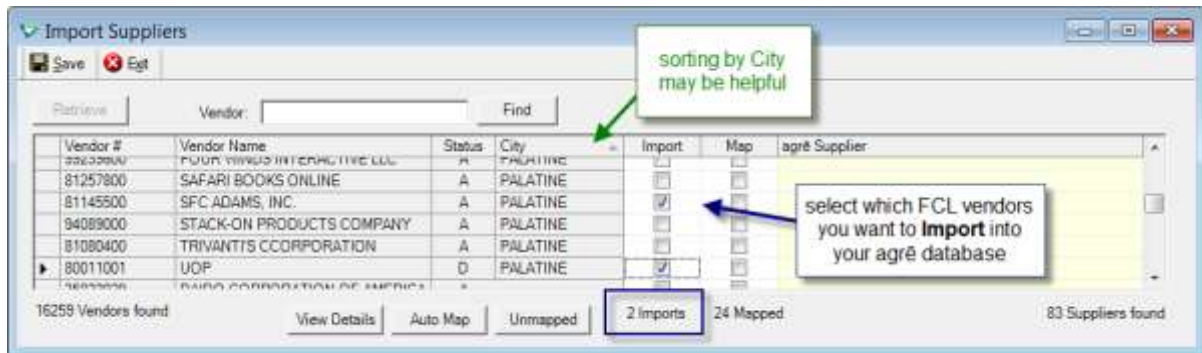
To jump down to the vendors starting with the letter "S" without scrolling, type "s" in the **Vendor** field and click **Find**.

The grid can be sorted, for example by City, by clicking on a column header.

Select a vendor to import. Not sure if that's the right one? Click **View Details** to see more information about them.



Check the **Import** box next to the vendor(s) you want to import and click **Save**.



Note

You don't have to import all vendors right now!
Vendors can be imported anytime so you can import just the ones you need.

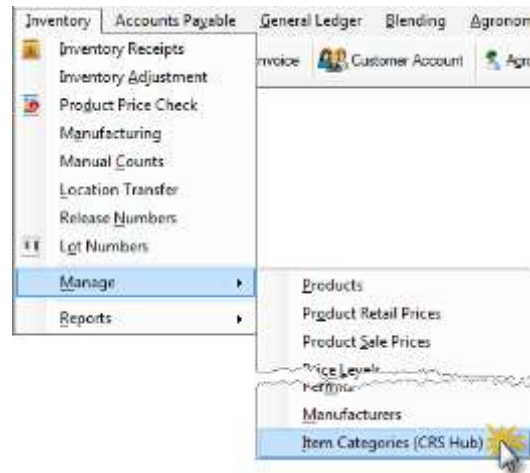
Importing Products/Items

FCL items that don't already exist in your database are imported from the FCL mainframe via CRS Hub.

Selecting Items by Retail

Before you start importing items, you'll want to confirm which categories of products you will want to import. There literally tens of thousands of FCL items available for import, so pre-filtering by category means you won't have to wade through thousands of items you are never going to use.

Navigate to **Inventory > Manage > Item Categories (CRS Hub)**.



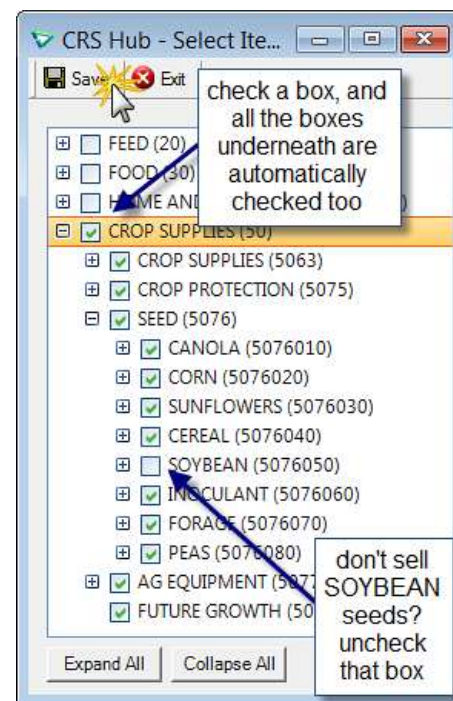
Tronita refers to this chart as a “tree” with many “branches”. Click the + and – buttons to expand and collapse a branch.

Check the boxes next to the item branches you'll be importing.

Only items from selected branches will be available for import.

Example: your retail sells seed, but not soybean seed. Check SEED (to select all seeds) then uncheck SOYBEAN. You won't see any soybean seeds listed among the other seeds when you retrieve items for import.

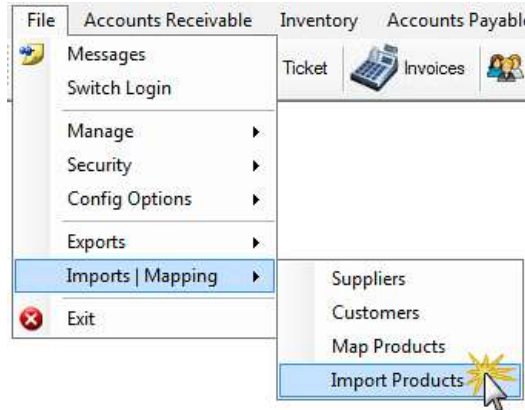
Save when you're done.



Importing Items

Now that you've selected and saved your tree branches, you can start importing items either individually or in batches (a maximum of 500 items can be imported at one time). Products can be imported any time in the future too so you can import just the ones you need now, and import more later as required.

Navigate to **File > Imports/Mapping > Import Products**.



When filtering for items to import you're going to want to be a little more specific than "show me everything available" or you'll be waiting in front of your computer for a really long time for all items to be retrieved – there are well over 10,000 available for import.

Use the **Filter Items** to narrow down the number of FCL items that **Retrieve Items** will bring back.

A screenshot of the 'Import Products' dialog box. It has a title bar with a green checkmark and the text 'Import Products'. Below the title bar are three buttons: 'Import' (green checkmark), 'Start Over' (blue square), and 'Exit' (red X). The 'Filter Items' section contains several input fields: 'Item Number:', 'Description:' (with 'canola' entered), 'Category (1):', 'Category (2):', 'Category (3):', 'Manufacturer:', 'Manufacturer Stock No:', 'UPC:', 'New Items' (checkbox), and a date dropdown set to 'Oct 01, 2024'. There is a yellow callout box with text: 'when checked before Retrieving Items, agrē uses its best guess (based on the item category ID) to select a Product Type, GL accounts, and Units - but you'll want to double-check for accuracy'. Below this is a 'Smart Link' checkbox (checked) and a 'Retrieve Items' button with a yellow starburst. At the bottom is a table with columns: Import, Item No, Description, Primary, Shipping, Pack Qty, Category, and GL Sales. The table contains five rows of data. Below the table, it says '51 Items found' with a blue arrow pointing to the left.

Import	Item No	Description	Primary	Shipping	Pack Qty	Category	GL Sales
☐	3099116	PRECEDE CANOLA 10 L	EA	CS	2	Cases	45005 -
☐	3099124	PRECEDE CANOLA 1000 L	EA	EA	1	Totes	45005 -
☐	3099173	RELEAF CANOLA 10 L	EA	CS	2	Cases	45005 -
☐	3099181	RELEAF CANOLA 1000 L	EA	EA	1	Totes	45005 -
☐	3126786	SY4187 CANOLA MINI VISIVIO/FORTE	BG	BG	1	454 kg	45010 -

By default the results in the grid are sorted by Description. You can sort the data by another column by clicking on its header. Click again to sort the other way.

Import	Item No	Description	Primary	Shipping	Pack Qty	Category
☐	3099116	PRECEDE CANOLA 10 L			2	Cases
☐	3099124	PRECEDE CANOLA 1000 L			1	Totes
☐	3099173	RELEAF CANOLA 10 L			2	Cases
☐	3099181	RELEAF CANOLA 1000 L			1	Totes
☐	3126786	SY4187 CANOLA MINI VISIVO/FORTE	BG	BG	1	454 kg

click any column header to sort

agrē retrieves all items from the FCL database that match the Filter Items - which could still be a large number.

You can further narrow down the list of items by applying **column filters**.

To clear a column filter, expand the column filter window again and choose **Clear**, or click **Start Over** (located at the top of the Import Products window in the title bar).

hover your mouse over a column header and click the arrow to expand the column filter window

leave the options you want checked uncheck the ones you don't

apply the column filter

If you had selected any items *before* you applied a column filter, those items will still be selected (even though they are hidden because of the column filter) but only the ones you can see will be imported.

4 items have been selected for import, but because you can see only 2 of them (due to the column filter) these are the only 2 that will actually be imported

indicates a column filter has been applied

If you want to import *all* the items selected, clear the column filter to display all the selected items again. agrē will import only the selected items that are displayed - if you can't see them agrē won't import them.



1. Select items by checking **Import**.
Click **Select All** to check all items retrieved (maximum of 500).
2. If importing a **single item** and no Smart Links were found, specify the Product Type, Unit Type (this should match the FCL Shipping Unit), and GL accounts for the item selected. These fields must be specified as they are required fields in agrē – you wouldn't be able to manually add a new retail-created product without them either.
3. If importing **multiple items**, in the **Product Update** section specify the Product Type, Unit Type (this should match the FCL Shipping Unit), and GL accounts for the item(s) selected. Click **Update Selected** to copy the Product Update settings down to all the blank fields in the selected item lines at once. Exceptions to the Product Update settings can be selected on the same line as the selected product (and will not be overwritten).
4. Click **Import**.
The items selected are imported into agrē as mapped products.

Tip

To see at a glance which products are Mapped run the **Inventory/Products > Product Mapped List** data export (File > Exports > Data). You'll see all the details (FCL Item Number, Category info, Product Source Code, etc.) for mapped items.

Imported Item Pricing

SRP Pricing is imported with the item, but not all mapped items have prices stored on the FCL mainframe so you will likely need to set at least some of your own.

Units	Location	Price Level	Retail Price	Min Price	2nd Min Price	Last Changed
> Bag	<Company>	Retail	\$610.00			Feb 08, 2013
		Prepaid				
		US Retail				
	Dog River	Retail				
		Prepaid				
		US Retail				
		SRP				
	Edmonton	Retail				
		Prepaid				
		US Retail				
		SRP	\$649.00			Oct 14, 2016
	St. Albert	Retail				
		Prepaid				
		US Retail				
		SRP				
	Stony Plain	Retail				
		Prepaid				
		US Retail				
		SRP	\$649.00			Oct 14, 2016
Pound	<Company>	Retail	\$11.00			Feb 08, 2013
		Prepaid				

Inventory > Manage > Products > Prices/Taxes

SRP could be for all, some, or no Locations and for all, some, or no Unit Types.

Imported Item Taxes

FCL does not send tax information along with the item when it's imported.

Manage Products

Product Code	Description	Product Type	Mapped?	Active?
341719	JELLY BELLY STAR WARS MACHINE	30GROC-SEASONAL CONF	☒	☒

Prices and Taxes for 341719 - JELLY BELLY STAR WARS MACHINE

Save Price Change History Exit

Retail Prices Percentage Taxes Flat Taxes

Tax	Location	Default Rate	Do not Charge	Optional	Charge	Override Rate
GST	Cardlock Station	5%	☒	☐	☐	
	Dog River	5%	☐	☐	☒	
	Edmonton	5%	☐	☐	☒	
	St. Albert	5%	☐	☐	☒	
	Stony Plain	5%	☐	☐	☒	
PST	Dog River	6%	☐	☐	☒	

FCL Managed Taxes Retail Managed Taxes

* FCL does not manage the taxes for mapped items residing in the following categories: Food (30), Energy (60), Fertilizer (70) or Feed(2055)

Inventory > Manage > Products > Prices/Taxes

If you are changing the default GST/HST or PST tax settings of a mapped items with FCL pricing you must first select **Retail Managed Taxes**.

Products flagged with **Retail Managed Taxes** will NOT receive any GST/HST or PST updates from the mainframe so your custom settings will NOT be overwritten during the nightly sync with mainframe.

Products of the following types are flagged automatically as **Retail Managed Taxes**:

- Feed (2055)
- Food (30)
- Energy (60)
- Fertilizer (70)

Products flagged with **FCL Managed Taxes** WILL receive updates to GST/HST and PST from the mainframe so any changes you make WILL be overwritten during the nightly sync.

Editing Mapped Products/Items

white fields are managed by you, edit however you like

pricing & taxes are imported if the item has pricing & taxes on the mainframe - if not, you'll have to set your own

grey fields are maintained on the FCL mainframe; they are read-only in agrè

Edit Product: 3015575 - PUMA 120 SUPER 6.2 L

Save Refresh Delete Prices/Taxes Exit

Product Units Inventory Notes Associated Products Blending Manufacturing Dangerous Goods Regulations

This product is active.

Product Code: 3015575

Description: PUMA 120 SUPER 6.2 L

Short Desc:

Alt Product Desc:

Product Type: 50CPROT-HERBICIDES (5075004) Add

UPC Code: ...

Default Project: Add

Manufacturer: BAYER CROPSCIENCE INC. Add

Manuf. Prod. Code:

GL Accounts

Sales: 45005 - Sales Chemicals

COGS: 55005 - COGS Chemicals (CS)

Inventory: 15005 - Inventory Chemicals (CS)

Inv. Accrual: 16005 - Chemical Accruals (CS)

Add GL Account

Inventory Item? ☒ Returnable? ☒

Blendable? ☐ Prohibit Purchase? ☐

Manufactured? ☐ Exclude From AgCollect? ☐

Omit From Sales Reports? ☐ Overridable Sales Account? ☐

Omit From eOrder? ☐ Exclude From Discount Groups? ☐

Lot Number Required? ☐

FCL Mapping

Item No: 3015575

Item Category No: 50750041110001

FCL Item Details

Product Characteristics

Characteristics

>*

Remove Add

FCL Item Details displays all the FCL information

When you edit an imported item, there will be some fields that you can't change. These are the fields that are managed on the FCL mainframe and are identified by a grey background.

All other fields are fair game. Don't like the product code? You can change it! Decided to use a different Sales GL? You can change that too. You won't be able to delete the FCL each/shipping unit on the Units tab but you can add additional ones and change the main unit type.

You can also add characteristics, supplier codes, etc. but don't feel like you have to fill in *every* field right now - you can add details as you go. There are some **exceptions**. If you import a new blend commodity item, you'll need ensure it's flagged as **Blendable** and add the nutrient info on the **Blending tab** or you won't be able to add it to a blend. Fertilizer Act and Permit details may need to be entered on the **Regulations tab** too.