

FCL LEASING AGENT PROCESS (AGRO EQUIPMENT LEASING)



The customer name on Work Orders and Invoices for leased equipment is the **grower's name**, not the leasing company's name. This way the order and sales history of the equipment resides with your actual customer, and helps with tracking patronage.

For further information, please visit the following links:

National Leasing:

Portal for staff:	https://portal.nationalleasing.com/login?locale=us
Base website	https://www.cwbnationalleasing.com/en

FCC:

<https://www.fcc-fac.ca/en.html>
<https://www.fcc-fac.ca/en/we-finance/agriculture/lease-equipment.html>

What you'll find:

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How do I process a payment for equipment I am leasing to a Grower?

Adding a Leasing Agent to a Customer Invoice

When a **Leasing Agent** is selected on an invoice, the invoice report will show the equipment as **Sold To the leasing agent** and Shipped To the customer.

To add a **Leasing Agent** customer invoice, start with a regular Invoice.

4 Add Invoice

Save Refresh Split View Credit View Prepayment View WO Activity Exit

Reference: **1** 1112 Baker, Mike ☐ Generate Reference Automatically Location: St. Albert
Customer: 1112 Baker, Mike Find Add Created By: agre User
Invoice Date: Jan 23, 2020 Due Date: Feb 22, 2020 Invoice Total: \$5,000.00
Customer and Shipping Purchases (1) Returns Totals Immediate Payment

Billing Address: PO Box 15
Westlock, AB T0E 4L0

Ship to: Rural address Find Add
7125 Twp Rd 64
Westlock, AB

Leasing Agent: **2** National Leasing
AgriLease
National Leasing

Carrier:
FOB:
Freight Terms:
Comments:

Communication/Membership
Phone: 780.459.1202 Mobile: 780.989.2302
Second Phone: 780.555.1212 Fax:
Membership No: 11123
Statement/Invoice Email: MikeBakerFarms@gmail.ca

Apply Credits
☐ If customer already has unapplied credits, apply those to this invoice automatically
☒ Apply credits on this invoice to this invoice first
☐ Apply remaining credits to outstanding items

3 ☒ Make a payment now Pay This Amount: \$5,000.00

Payment Type	Amount	Total Amount	Amount Tendered	Change Due
> Leasing	\$5,000.00	\$5,000.00		

Accounts Receivable > Invoice

Step 1: select the Grower leasing the equipment

Step 2: on the **Customer and Shipping** tab select the **Leasing Agent**

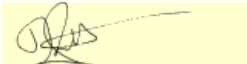
Step 3: on the **Immediate Payment** tab, select **Leasing** as the **Payment Type**
(if you have a multiple Leasing payment types available please confirm the correct tender type for this sale with your supervisor)

Step 4: **Save** and print at least two (2) copies of the invoice

Step 5: have the grower sign one (1) copy and send it to the Leasing Agent
please see sample invoice on page 3



When the invoice is printed the **Leasing Agent** address will display as the Sold To address, and the grower's address will display as the Ship To address.
Send the signed copy to the Leasing Agent.

		Invoice				
TSL Agro Co-op Ltd 335 Carleton Drive St. Albert, AB T8N 7L1 Ph: 780.459.4477 Fax: 780.459.6405		Ref No: 100050 Date: Nov 19, 2018 Page: 1 of 1				
Toll Free: 888.987.6642						
Sold To: National Leasing 1525 Buffalo Place Winnipeg, MB R3T 1L9		Ship To: Baker, Mike (11123) PO Box 15 Westlock, AB T0E 4L0 (11123) NW-2-51-1-W5 agreU				
		780.459.1202 Sales Rep: Bruce Clarkson GST#: 102023923RT 021				
Item #	Description	Ref No	Quantity Unit	Taxes	Unit Price	Amount
3069416	2605000 COMPLETE IN BIN SUPER SWEEP		1 Each	N	\$5,000.00	\$5,000.00
					Total:	\$5,000.00
					Leasing	\$5,000.00
					Balance Owing:	\$0.00
Signature: 		Date: _____				
Created On: Nov 19, 2018 3:53 PM						

How do I create a new order for an equipment lease?

Adding a Leasing Agent to a Customer Work Order or Quote

When a **Leasing Agent** is selected on a work order, the work order report will show **the leasing agent** but the grower is still the customer.

To add a **Leasing Agent** work order, start with a regular Work Order.

3 Add Work Order

1 Customer: Baker, Mike (11123)

can be quote or order

Type: ☐ Quote ☒ Order Sub Type:

Location: St. Albert

Created By: aggre User

Comments:

Date Ordered: Jan 31, 2025 Status: Active

Expiry Date: Jun 30, 2025

Customer and Order Products (1) Internal

Billing Address PO Box 15 Westlock, AB T0E 4L0 Phone #: 780.459.1202 Manage Customer

Ship To Rural address 7125 Twp Rd 64 Westlock, AB Find Add

Leasing Agent: 2 National Leasing

Sales Rep: AgriLease

Customer Order No:

Customer Contact:

Service Details Service Dates: to ☒ No Service Dates

Authorization Authorized By: Authorized Date: ☒ No Authorization

Payment Terms Payment Due: ☒ No Due Date Paid In Full? ☐ Terms: ☐ Custom

Accounts Receivable > Work Orders

Step 1: select the Grower leasing the equipment

Step 2: on the **Customer and Order** tab select the **Leasing Agent**

Step 3: **Save** and print at least two (2) copies of the quote/order

Step 4: have the grower sign one (1) copy and send it to the Leasing Agent
please see sample work order on page 5

When the work order is printed the **Leasing Agent** and address will display first, then the grower's name and address will display as the Customer address.
Send the signed copy to the Leasing Agent.



TSL Agro Co-op Ltd

335 Carleton Drive
St. Albert, AB T8N 7L1
Phone: 780.459.4477
Fax: 780.459.6405
Toll Free: 888.987.6642

Order: SAWO00039

Date: Jan 31, 2025

Status: Active

Expiry Date: Jun 30, 2025

Leasing Agent:

National Leasing
1525 Buffalo Place
Winnipeg, MB R3T 1L9

Customer:

Baker, Mike (11123)
PO Box 15
Westlock, AB T0E 4L0

780.459.1202

Location: St. Albert

Product	Quantity	Units	Price	Committed	Prepaid	Taken	Status	Total
2605000 COMPLETE IN BIN SUPER SWEEP (3069416)	1.00	each	\$75,000.00	☒	☐	0.00	Active	\$75,000.00

If you have any questions please call your client support rep Mike, at extension 5.

Subtotal: \$75,000.00

Grand Total: \$75,000.00

Authorization:

Date: _____

Printed Jan 31, 2025 11:24 am

Created By agre User

Page 1 of 1

Managing Leasing Agents

A leasing agent will need to be added for all companies financing grower equipment. The sale needs to be recorded under the member's account (for patronage), but in real life the equipment will be owned by the Leasing Agent.

1 Manage Leasing Agents

+ Add Edit Delete Exit

Leasing Agent Name	Active?
AgriLease	☒

3 Add Leasing Agent

Save Exit

Leasing Agent Info

2 Name: NATIONAL LEASING

Address: 1525 BUFFALO PLACE

City: WINNIPEG Province: Manitoba

Country: Canada Postal Code: R3T 1L9

Active? ☒

Accounts Receivable > Manage > Leasing Agents

Step 1: navigate to **Accounts Receivable > Manage > Leasing Agents**

Step 2: add each Leasing Agent as required

Step 3: **Save** to save the agent

Because a Leasing Agent has been selected, when a work order or invoice is printed agrē will automatically swap the names so that the equipment shows as ordered for / sold to the Leasing Agent's address and shipped to the grower's address. This swap happens *only* when a Leasing Agent is selected.