

FCL agrē Match & Map

Now that your agrē database will be communicating with FCL's mainframe (through a middle-man known as **CRS Hub**) they both need to be speaking the same language. For example, when you tell FCL that an agrē customer made a payment, CRS Hub needs to translate which FCL member matches up to your agrē customer Lyle Martin.

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Overview

If you were starting with a brand-new agrē database, you'd tell it to import FCL members for your retail, vendors, and items into your database from the master lists stored on CRS Hub and start business-as-usual from scratch. But you've been working with agrē for a while, so you've got existing customers, suppliers, and products already setup in your database and you don't want to lose the history associated with them.

That's where the **Match & Map** tools come in - they create links in CRS Hub (that's the middle man between your agrē database and the FCL mainframe) between the customers, suppliers, and products you already have in agrē to the master lists of members, vendors, and items on the FCL mainframe. The ones not already in your database can be imported as new.

Before you start matching, Tronia will do a First Pass of your masterfile data (customers, products, and suppliers) to identify what you have, what's been used, and what needs to be mapped. For example, you may have 10,000 customers in agrē, but have sold to only 3500. Rather than map all 10,000 customers, Tronia will delete the ones with no history so only the customers with activity remain. Then we'll then do a Second Pass and automatically match and map as many customers as possible for you. To find a match for customers, agrē compares the agrē customer code, name, address, and phone number against the FCL Master Member List stored in CRS Hub. The customers that agrē can't map automatically will need to be mapped manually by you. A similar process will be followed for suppliers and products.

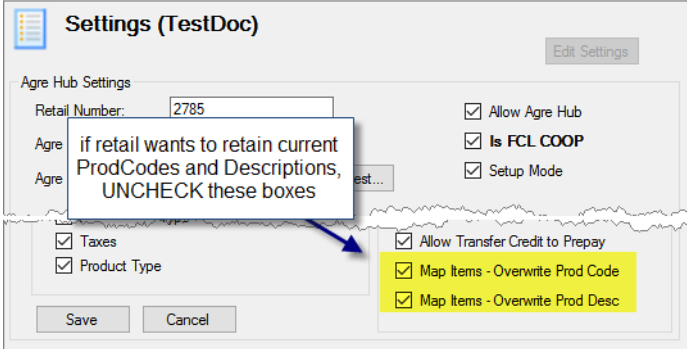
All customers *must* be mapped to FCL members, but it is not required that all suppliers and products be mapped to FCL vendors and items.

Setup (one time tasks)

Configuring agrēHub Settings

Check the agrē Management Tool for the preferred overwrite settings.

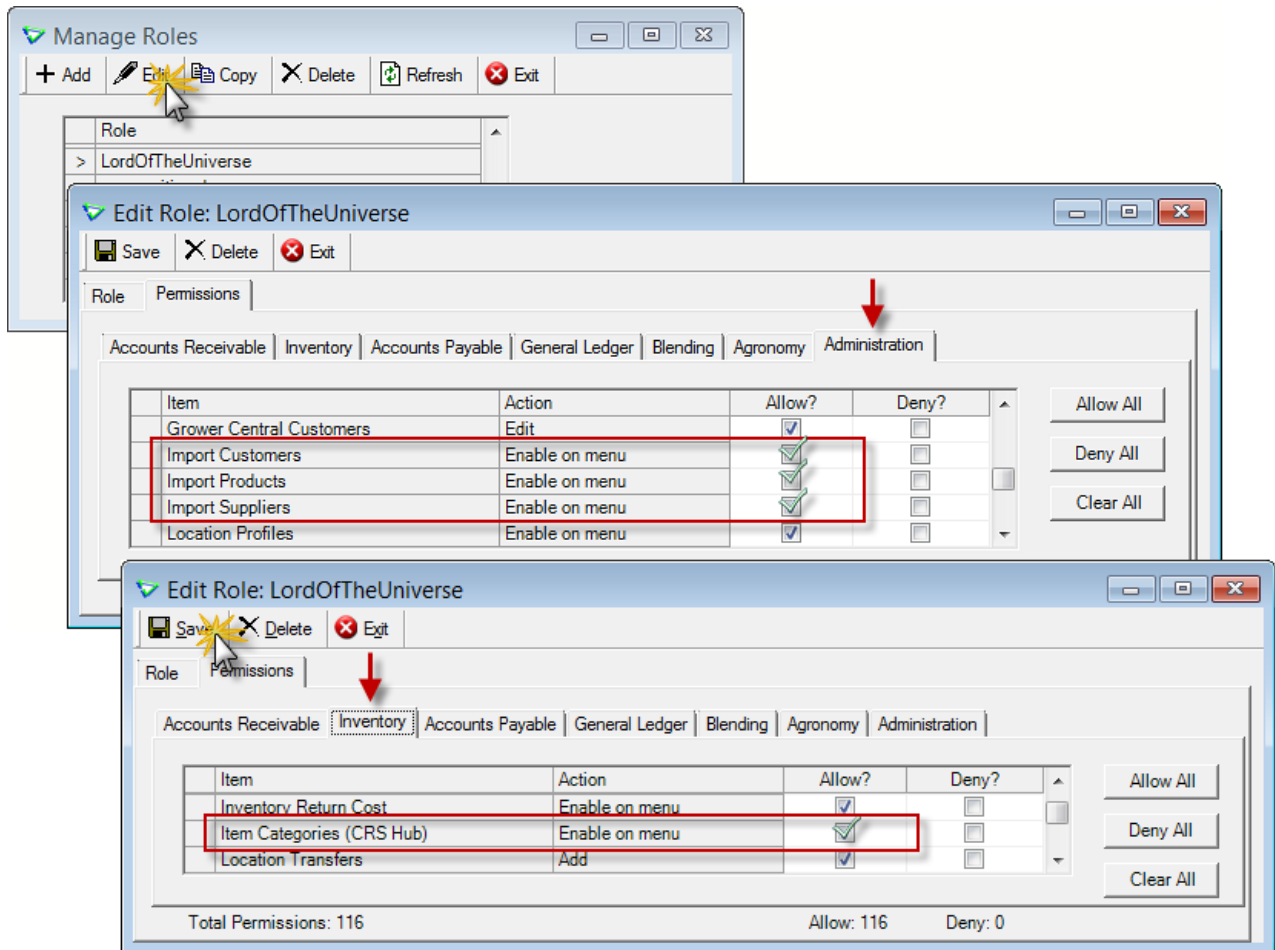
Check/uncheck the config items as required.



The screenshot shows the 'Settings (TestDoc)' window. It has a title bar with a list icon and the text 'Settings (TestDoc)'. In the top right corner is an 'Edit Settings' button. The main area is titled 'Agre Hub Settings' and contains a 'Retail Number' field with the value '2785'. Below this are two 'Agre' labels, each followed by a 'Test...' button. A tooltip points to the first 'Test...' button with the text: 'if retail wants to retain current ProdCodes and Descriptions, UNCHECK these boxes'. To the right of the 'Retail Number' field are three checked checkboxes: 'Allow Agre Hub', 'Is FCL COOP', and 'Setup Mode'. Below the 'Agre' labels are two columns of checkboxes. The left column has 'Taxes' and 'Product Type', both checked. The right column has 'Allow Transfer Credit to Prepay' (checked), 'Map Items - Overwrite Prod Code' (checked), and 'Map Items - Overwrite Prod Desc' (checked). At the bottom are 'Save' and 'Cancel' buttons.

Security Permissions

You'll need permission in agrē before you can begin matching and mapping.



File > Security > Manage Roles

Flagging the FCL Supplier (required for eOrders)

You likely already have a supplier called Federated Co-op or something similar. You'll need to edit that supplier (or add a new one if it doesn't exist) and flag it as *the* FCL supplier so eOrders can be processed (eOrders can be submitted *only* for the supplier flagged as the FCL supplier).

The screenshot shows the 'Edit Supplier' window for 'FEDERATED CO-OPERATIVES LTD. (88880)'. The window has tabs for 'Supplier', 'Contacts', 'Addresses', 'Settings', and 'Comments'. The 'Supplier' tab is active. Fields include: Supplier Code (88880), Supplier Name (FEDERATED CO-OPERATIVES LTD.), Supplier Alias, Address (BOX 1050), Primary Phone, Secondary Phone, Mobile, GST No., and Mapping Code (60069202). There are checkboxes for 'Active' and 'FCL Status: Active'. A red arrow points to the 'Is FCL Supplier?' checkbox, which is checked. Below the 'Add Characteristic' and 'Remove Characteristic' buttons, there is a green checkmark icon.

Accounts Payable > Manage > Suppliers

SRP Price level

An **SRP Price Level** must be set in order for agrē to use the FCL mainframe pricing data that is updated from CRS Hub.

Check the box next to **SRP Price Level** and type a label for the SRP price.

The screenshot shows the 'Manage Price Levels' window. It has buttons for 'Save', 'Edit Name', 'Prepaid Price Level', and 'Exit'. A table lists price levels: P1, FCL Promo, P2, and P3. Below the table, there is a green checkmark icon, a checkbox labeled 'SRP Price Level' which is checked, and a text field containing 'FCL SRP'. A 'Remove Price Level' button is also present.

Inventory > Manage > Price Levels

When determining prices, agrē goes through every other price level first and if no other price is found the SRP price is used.

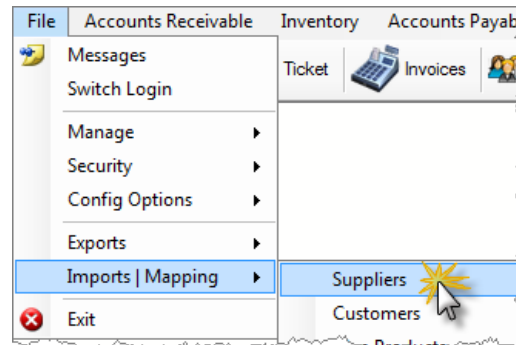
Supplier/Vendor Mapping

Let's start with the easiest one so you can get the hang of it: mapping your existing agrē Suppliers to FCL Vendors.

As agrē suppliers are mapped to FCL vendors, the agrē Supplier Code will be replaced immediately with the FCL Vendor Code. The old agrē Supplier Code is not retained.

Mapping Vendors to Existing Suppliers

Start the process by navigating to:

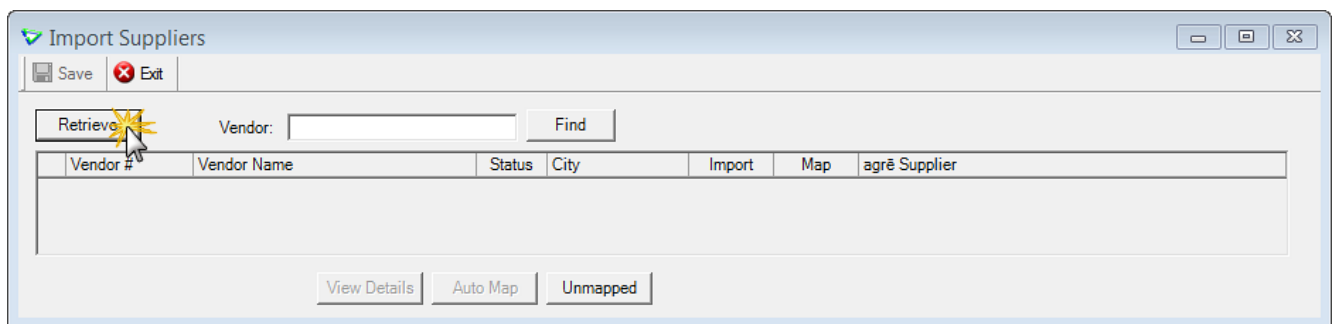


File > Imports|Mapping > Suppliers

Note

To reduce the number you need to match, Tronia will delete suppliers that have no activity in your agrē database (don' worry, they're not gone for good - you can import them as new suppliers - with the mapping already in place – whenever you need them).

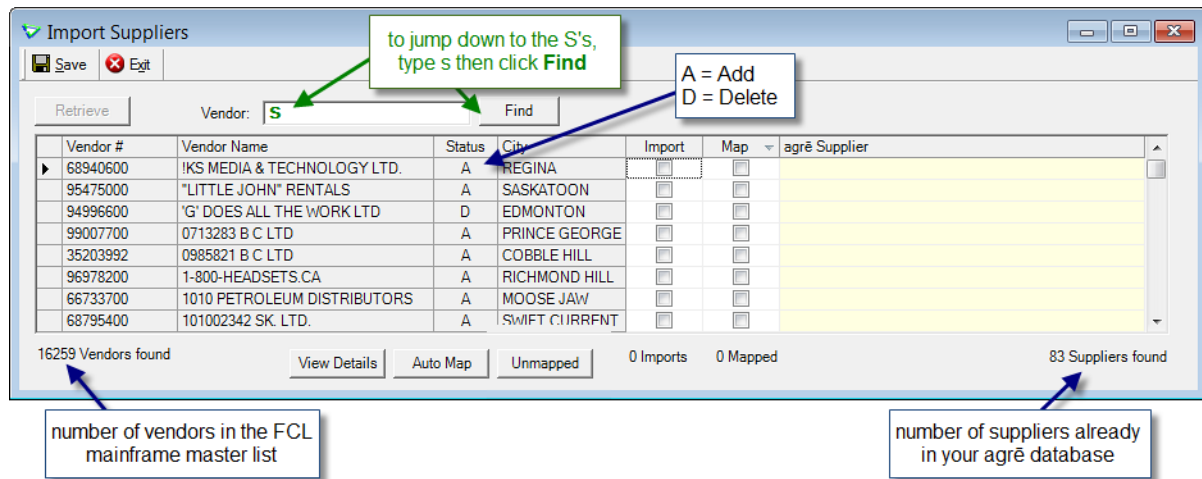
Click **Retrieve** to view the list of FCL vendors.



Tip

Click **Unmapped** to view the list of unmapped agrē Suppliers.

On the left you'll see the FCL vendors (every retail sees the same list of vendors) and on the right is where you'll map to your agrē suppliers.

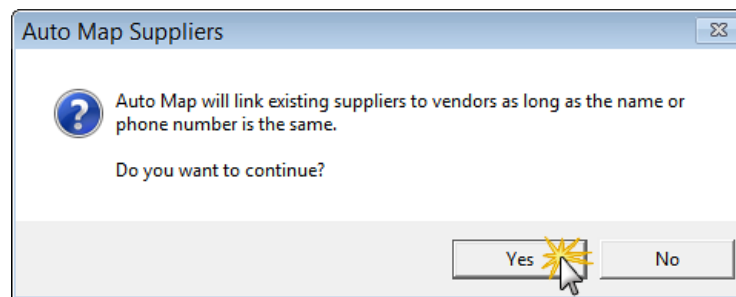


Tips

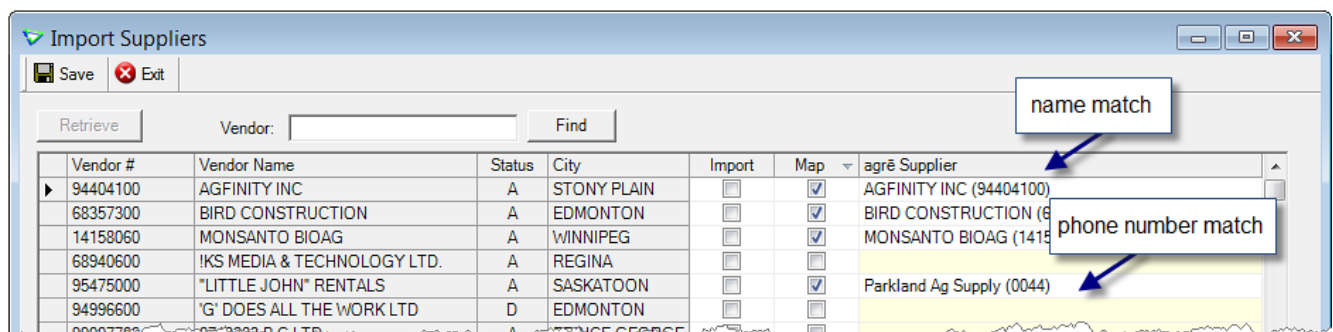
To jump down to the vendors starting with the letter "S" without scrolling, type "s" in the **Vendor** field and click **Find**.

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

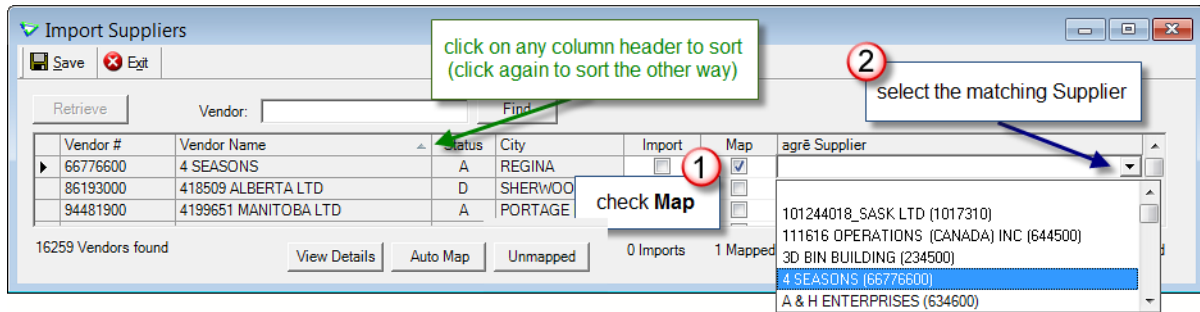
Select **Auto Map** to search for agrē Suppliers that match FCL Vendors based on name and phone number.



All matches found will have the **Map** column checked and the **agrē Supplier** selected.



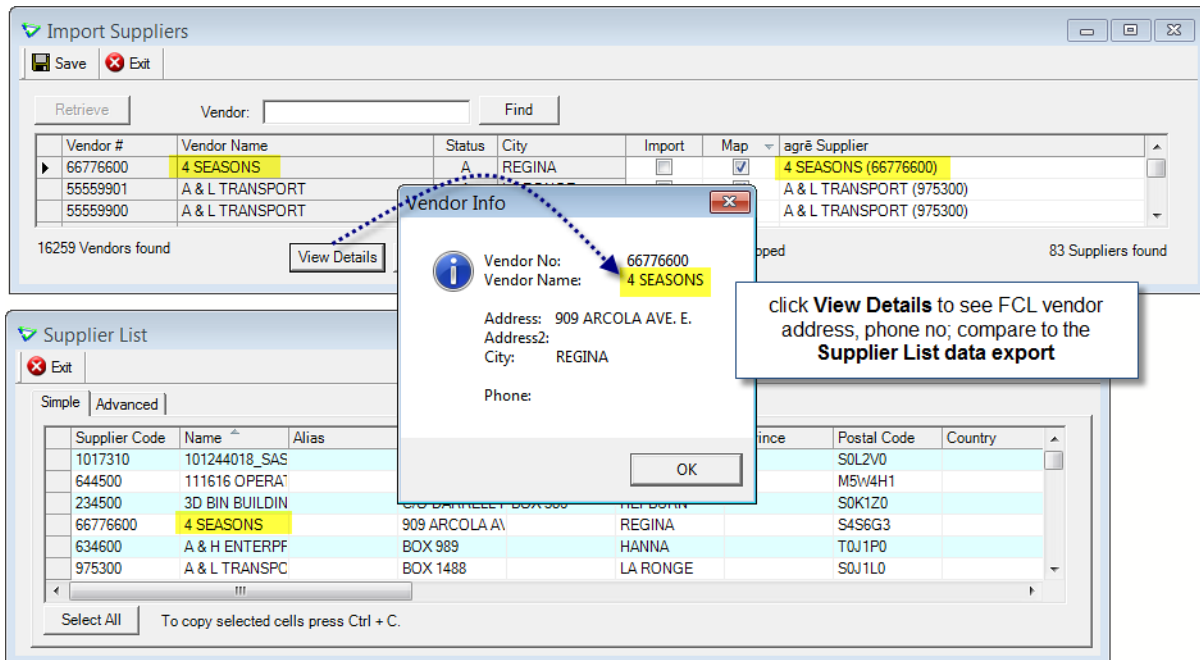
Vendors that were not mapped automatically will need to be mapped manually.
To assign a match, click the **Map** box to check it.



To select a match in the agrē Supplier column either

- click the down-arrow to select from the list of agrē suppliers
- start typing the name of the supplier
- type a letter or two, then click the down arrow

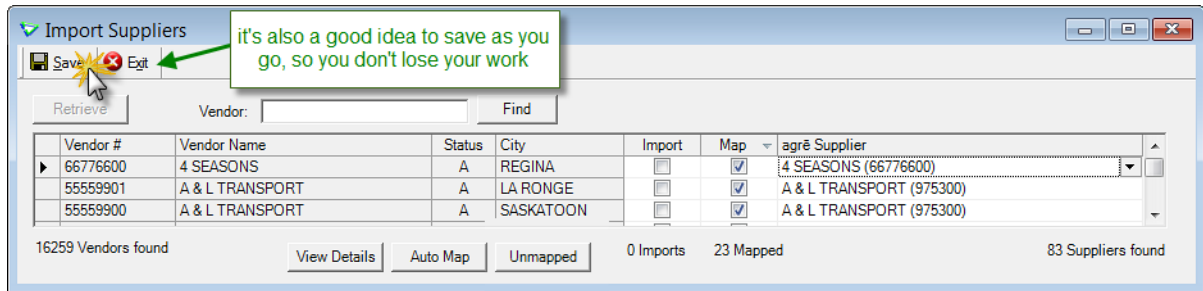
Tip: Having the **Supplier List** data export open while you're mapping vendors can make comparing details easier.



File > Exports > Data > Accounts Payable

Saving the Mappings

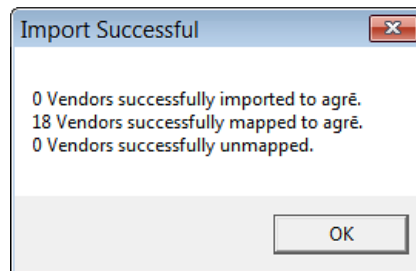
Once you've made your matches, **Save** them. You can map some suppliers now and save, then come back later and map a few more when you have time.



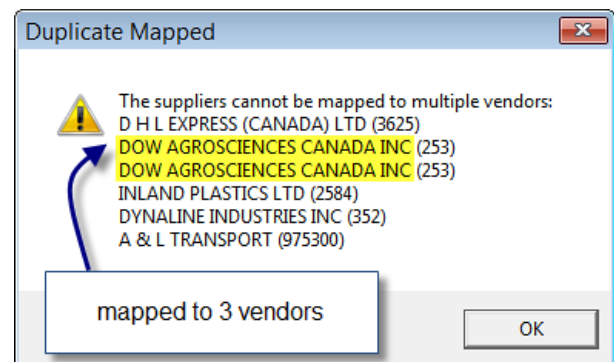
Tip

Click **Unmapped** to see which agrē suppliers are not yet mapped to FCL Vendors.

After each **Save**, a message box appears telling you how many suppliers were mapped, unmapped, or imported.

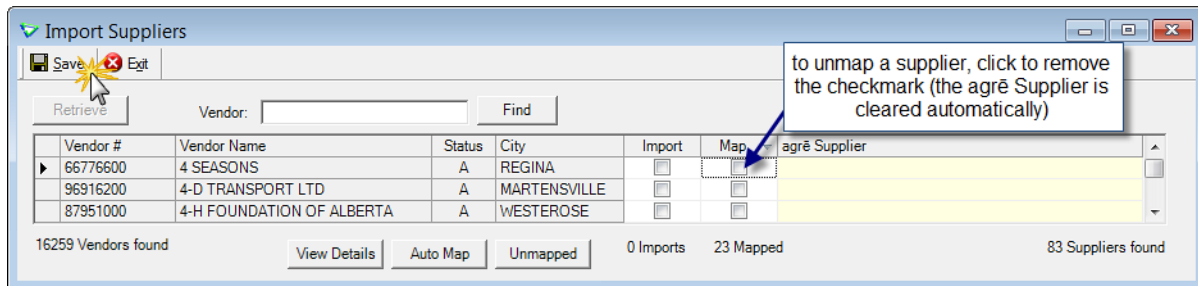


Each agrē Supplier can be mapped to a single FCL Vendor. If you accidentally map the same supplier multiple times, agrē will let you know.



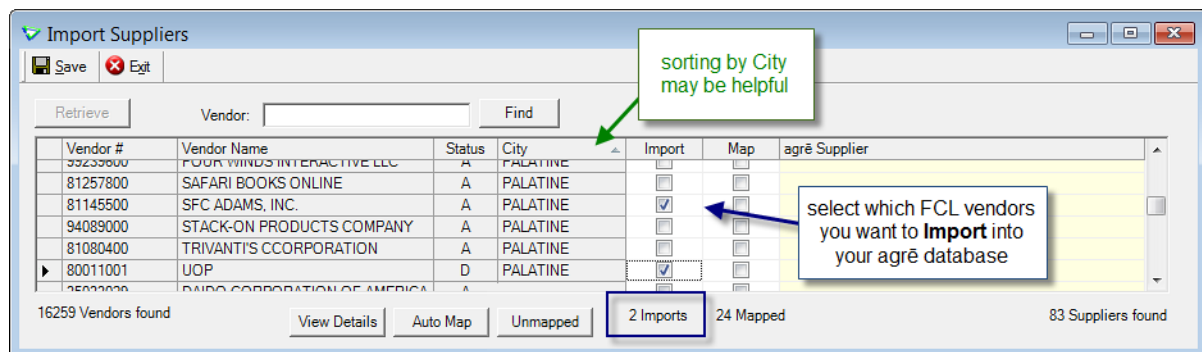
Unmapping Vendors

If you need to undo mapping to a vendor, just uncheck the **Map** box. The **agrē Supplier** field will be cleared automatically. Remember to **Save** the changes.



Importing Vendors

If there are FCL Vendors that are not in your agrē database but you want them to be, you can import them. Imported vendors are mapped automatically. **Save** the changes.



Note

You don't have to import all the rest of the vendors right now!
Just import the ones you need.

Vendors can be imported anytime, not just during conversion. If you won't order from a vendor until 6 months from now, you can import the new vendor then.

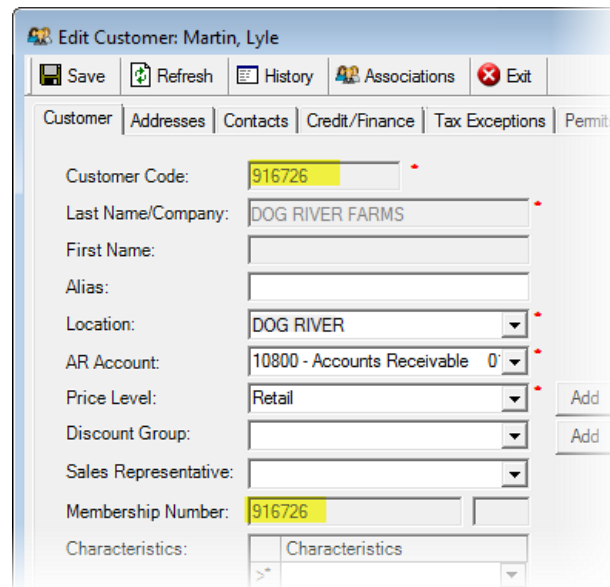
Tip

Refer to **FCL Importing Masterfiles** for more detailed instructions on importing vendors.

Customer/Member Mapping

Next up is Member Mapping.

As agrē customers are matched to FCL members, the existing agrē Customer Code and agrē Membership Number will be replaced immediately with the FCL Member Number (including check digit if applicable) stored in CRS Hub. The old agrē Customer Code and member number are not retained.



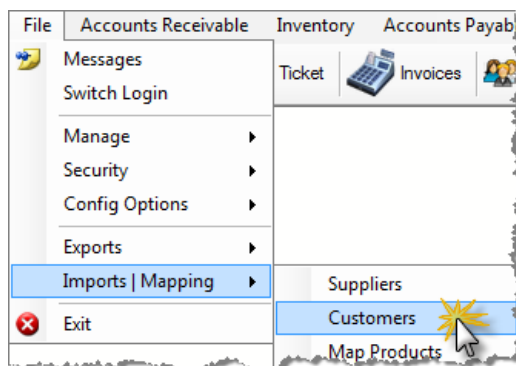
Note

To reduce the number of customers you need to match, Tronia will delete customers that have no activity in your agrē database (don't worry, they're not gone for good - agrē [will import them soon](#) as new customers with the mapping already in place).

Once an agrē customer has been mapped to an FCL member you won't be able to delete the customer in agrē unless you [unmap](#) them first.

Mapping Members to Existing Customers

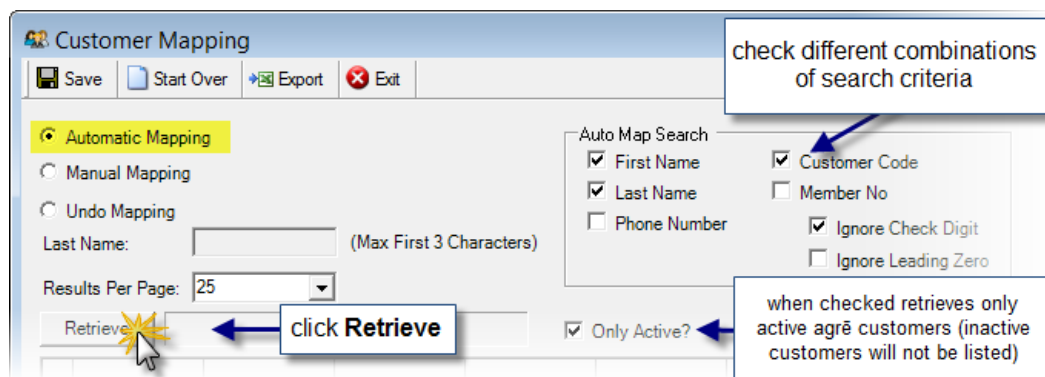
Start the member mapping process by navigating to:



File > Imports|Mapping > Customers

Automatic Mapping

Tronia will have already automatically mapped most of your customers to the master member list in CRS Hub - but we don't know your members as well as you do. Try using different combinations of the **Automatic Mapping** search criteria in case you can make some additional matches we weren't able to see. For example, it may be quite obvious to you that agrē customer Belle Plain Farms should be mapped to FCL member Marc Adams.



Tip

Consider leaving the **Results per Page** at a workable number like 25, or you'll be doing a lot of scrolling to see all the names on the same screen. **Next** takes you to the next group of 25, **Previous** takes you back.

Check the **Map** box if there's a match.

Customer Code	Map	CRS Member No	agre Member No	agre Name	CRS Name	agre Phone	CRS Phone	City	Postal Code
91650	☒	916502		Abraham, James	ABRAHAM ACRES	780.892.3030		Wabamun	T0E 2G0
41616	☒	416164		BAKER, MIKE	MIKE BAKER			Westlock	T0E 4L0
41673	☒	416735		Phoenix Acres	PHOENIX FARMS	780-720-3497	403-720-3497	St Albert	T8A 0R7

If all rows in the grid can be automatically mapped, click **Select All**.

If there are more rows than can be shown on one screen, click **Next** to see the next group.

Saving the Mappings

Save the mappings as you go.

Saving affects all the members retrieved, so you can map 300 at a time (click **Next** to see the next group) and then **Save** them all at once.

Auto Map Customers?

Are you sure you want to automatically map 1 Customers?

Yes No

Saving immediately overwrites the agrē Customer Code and the agrē Membership number with the FCL member number stored on CRS Hub. The old agrē Customer Code and the old agrē Membership Number are not stored or retained. Also overwritten with FCL mainframe information are the customer name and billing address (if you are in production mode).

Starting Over

Click **Start Over** to change which criteria boxes are checked and **Retrieve** a new set of data to match.

Start Over clears the grid, and any mappings you've made, so you'll want to save *before* you start over if you want to retain any mappings you're made.

All agrē customers must be mapped, so after you've made as many automatic matches as you can you'll need to map the rest manually.

Manual Mapping

To view your agrē customers who are not yet mapped select **Manual Mapping** and click **Retrieve**.

Customer Mapping

Save Start Over Export Exit

Automatic Mapping
Manual Mapping
Undo Mapping

Last Name: (Max First 3 Characters) optional

Results Per Page: 25

Retrieve

Auto Map Search

☒ First Name ☒ Customer Code
☒ Last Name ☐ Member No
☐ Phone Number

☒ Only Active? when checked retrieves only active agrē customers (inactive customers will not be listed)

First Last Compare Previous Next Deselect All Select All

You'll see the list of unmapped customers and an empty column for selecting the matching FCL member from the CRS Hub master member list.

Customer Mapping

Save Start Over Export Exit

Automatic Mapping
Manual Mapping
Undo Mapping

Last Name: (Max First 3 Characters)

Results Per Page: 25

Retrieve

Auto Map Search

☒ First Name ☒ Customer Code
☒ Last Name ☐ Member No
☐ Phone Number ☒ Ignore Check Digit
☐ Ignore Leading Zero

agrē Customer Code	Map	CRS Hub Member	agrē Last Name	agrē First Name	agrē City	agrē Province	agrē Postal Cod	agrē Phone No.
10673			Abraham	James	Wabamun	Alberta	T0E 2G0	780.892.3030
402537			BAKER	Mike	Westlock	Alberta	T0E 4L0	
10636			Phoenix Acres		St Albert	Alberta	T8A 0R7	780-720-3497

First Last

Showing Results 1 to 13

number of customers not yet mapped to FCL members

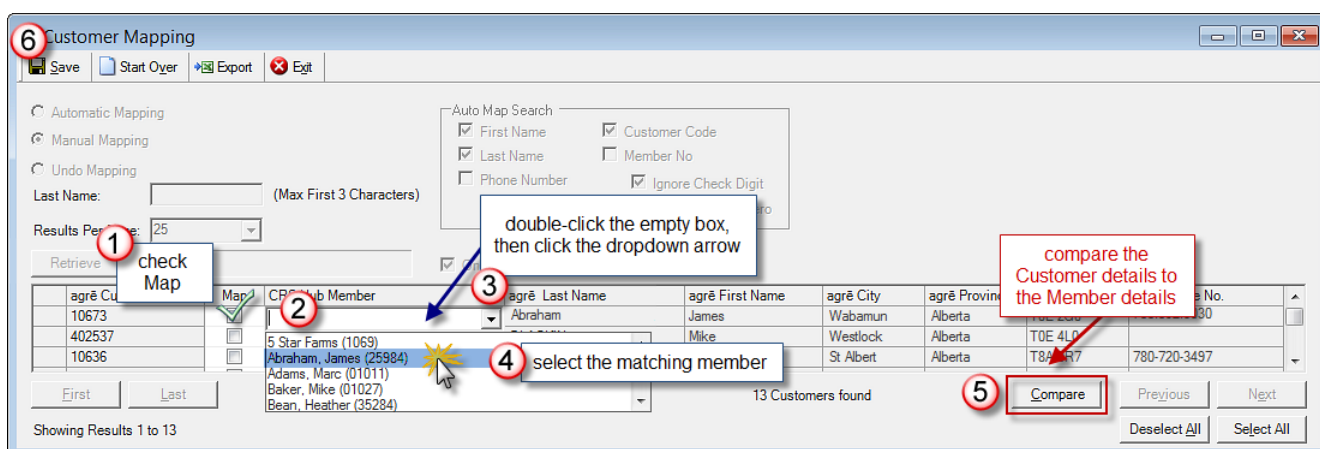
13 Customers found

Compare Previous Next Deselect All Select All

To manually map an agrē customer to a CRS Hub Member

(please refer to image on next page)

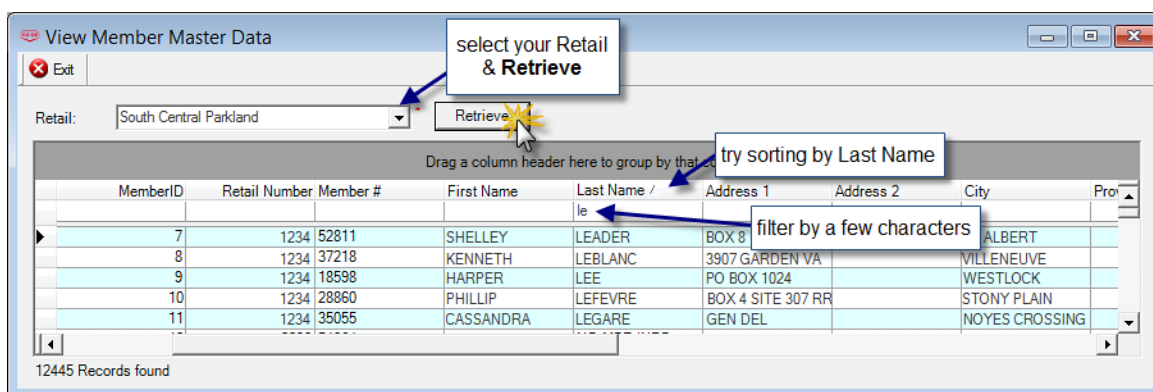
- check **Map** next to the agrē customer you want to match
- double-click the empty **CRS Hub Member** box next to the **agrē Last Name**
- click on the dropdown arrow to bring up the master list of FCL members from CRS Hub
 - you can type a starting letter (eg. type S to jump down to the members whose names start with S) to scroll through the list faster
- select the matching member
- **Compare** the details to make sure you've got the right match
- **Save** your changes



Once you've made a match, confirm you've selected the correct member by using **Compare**.



For manual mappings you may find it helpful also to compare to the **Member Master in CRS Hub**.



Data Management > View Master Data > Member

Note

Data in CRS Hub grids can be manipulated just like the grids in an agrē data export: sort by clicking on a column header, group by dragging a column header into the dark grey area, put columns in a different order by clicking and dragging.

Unmapping Members

If you need to undo member mapping, select **Undo Mapping** and click **Retrieve**.

The screenshot shows the 'Customer Mapping' window. The 'Manual Mapping' section has 'Undo Mapping' selected. The 'Auto Map Search' section has 'Customer Code', 'Ignore Check Digit', and 'Ignore Leading Zero' checked. The 'Retrieve' button is highlighted with a yellow starburst. The table below shows columns for Customer Code, Map, CRS Member No, agre Member No, agre Name, CRS Name, agre Phone, CRS Phone, City, and Postal Code.

Customer Code	Map	CRS Member No	agre Member No	agre Name	CRS Name	agre Phone	CRS Phone	City	Postal Code
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Check the **Undo Mapping** box for each customer that you want to unmap or click **Select All** to check all Undo Mapping boxes in the window at once (click **Next** to view the next 25 mapped customers if you want to unmap them too). When you're done, **Save** your changes.

The screenshot shows the 'Customer Mapping' window with the 'Undo Mapping' box checked for a customer. A yellow starburst is over the 'Save' button. A callout box points to the 'Undo Mapping' checkbox with the text 'check Undo Mapping'. Another callout box points to the '593 Customers found' status with the text 'number of customers mapped to FCL members'. The table below shows columns for Customer Code, Member No, First Name, Last Name, City, Province, Postal Code, Phone No., and Undo Mapping.

Customer Code	Member No.	First Name	Last Name	City	Province	Postal Code	Phone No.	Undo Mapping
> 10084	100842	James	Abraham	Wabamun	Alberta	T0E 2G0	780.892.3030	☒
2865	28654	Mike	Baker	Westlock	Alberta	T0E 4L0		☐
8839	88393		Phoenix Acres	St Albert	Alberta	T8A 0R7	780-720-3497	☐

What about the rest of my members?

What about the grocery, HABs, and Petro members from your retail, the ones you *haven't* sold agro products to and so weren't setup as customers in your agre database?

The first time your agre database communicates with CRS Hub and processes the initial automated Member Update, all those customers will be automatically downloaded (already mapped) into agre.

Product/Item Mapping & Importing

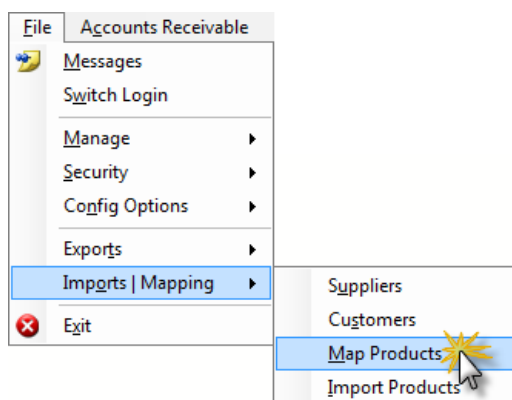
There are two kinds of items/products in agrē.

Mapped Items are products that exist in your agrē database and in CRS Hub, and are linked to FCL Items on the mainframe. These products are mapped in order to process eOrders, and to receive data updates and pricing information from the FCL mainframe.

Retail-created Items/Products are added like you've always added a new product and exist in your agrē database only. These products are maintained wholly by your retail. Retail-created products are not mapped.

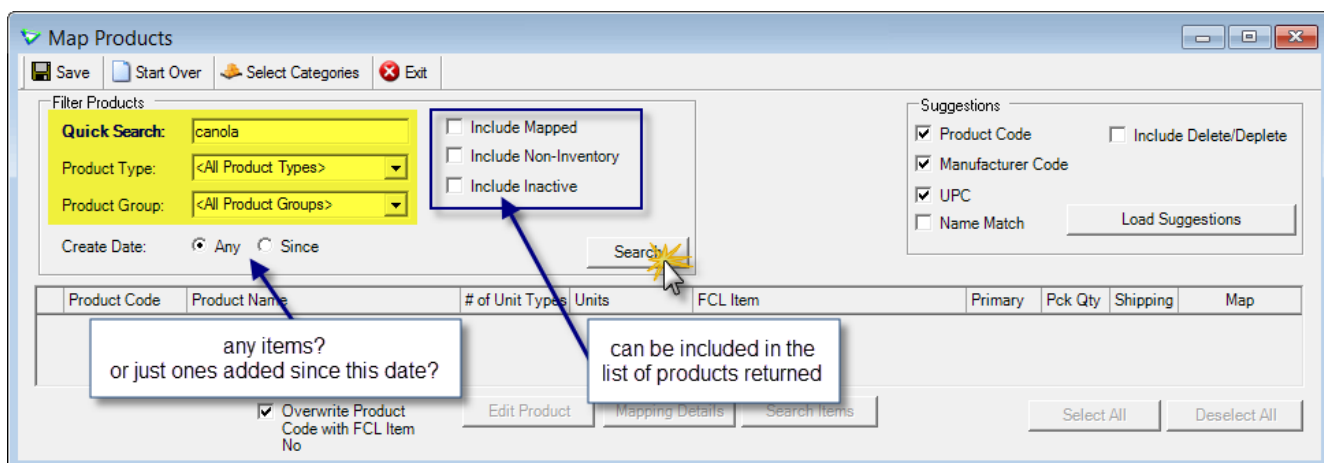
Mapping FCL Items to Existing agrē Products

Navigate to **File > Imports|Mapping > Map Products**.



The first step is to use **Quick Search** to search for products in your agrē database. Quick Search checks all or part of: Product Description, Product Code, Short Description, UPC, or Manufacturer Product Code, Supplier Alternate Product Code, and Brand.

You can also choose to filter by Product Type or Product Group.



File > Imports | Mapping > Map Products

Note

To reduce the number of products you need to match, Tronia will delete products that have no activity in your agrē database (don't worry, they're not gone for good – you can [import](#) them soon with the mapping already in place).

The second step is to look for matching FCL items for your agrē products. agrē assists with this task by suggesting matching items. One, some, or all of the **Suggestions** can be checked.

The item matching suggestion options include:

- agrē Product Code = FCL Item Number
- agrē Manufacturer Code = FCL Item Number
- agrē UPC(s) = FCL UPC(s)
- agrē Product Description = FCL Item Description
- also suggest Delete/Deplete FCL Items

Map Products

Save Start Over Select Categories Exit

Filter Products

Quick Search: canola

Product Type: <All Product Types>

Product Group: <All Product Groups>

Create Date: Any Since

Include Mapped

Include Non-Mapped

Include Inactive

if no suggestions are loaded, check additional boxes to search more data fields and click **Load Suggestions** again

Suggestions

Product Code

Manufacturer Code

UPC

Name Match

Load Suggestions

Include Delete/Deplete

Product Code	Product Name	# of Unit Types	Units	FCL Item	Primary	Pck Qty	Shipping	Map
3107091	SY4166 CANOLA JUMPSTART	1	BG					
D		1	BG					
IN		1	BG					
L		1	BG					
PREINVIGOROUS	Prepurchased Invigor 5050 Canola	1	BG					

5 Products found

Overwrite Product Code with FCL Item No

Edit Product Mapping Details Search Items

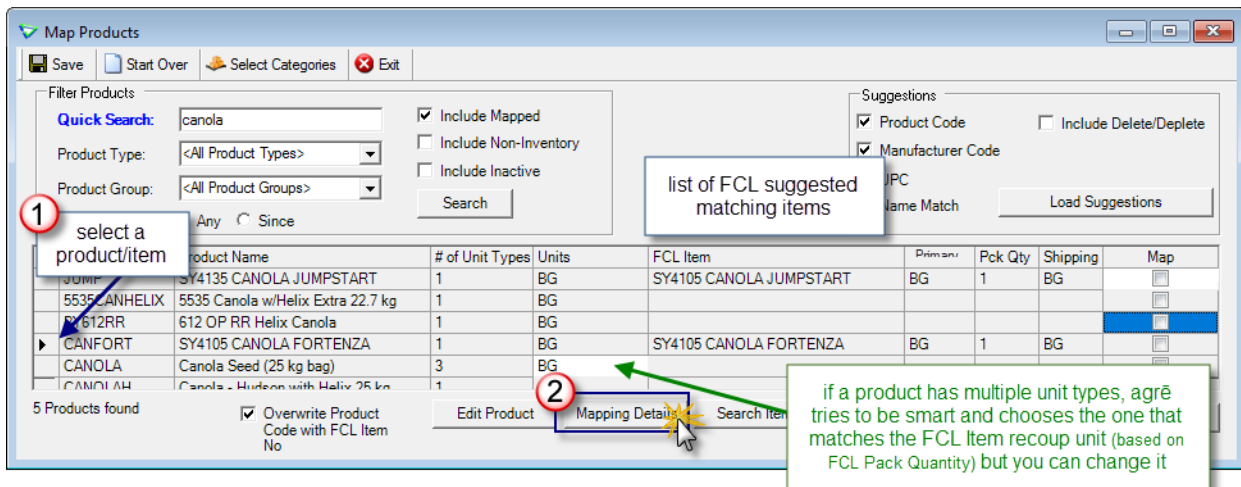
Select All Deselect All

list of agrē products that match the QuickSearch

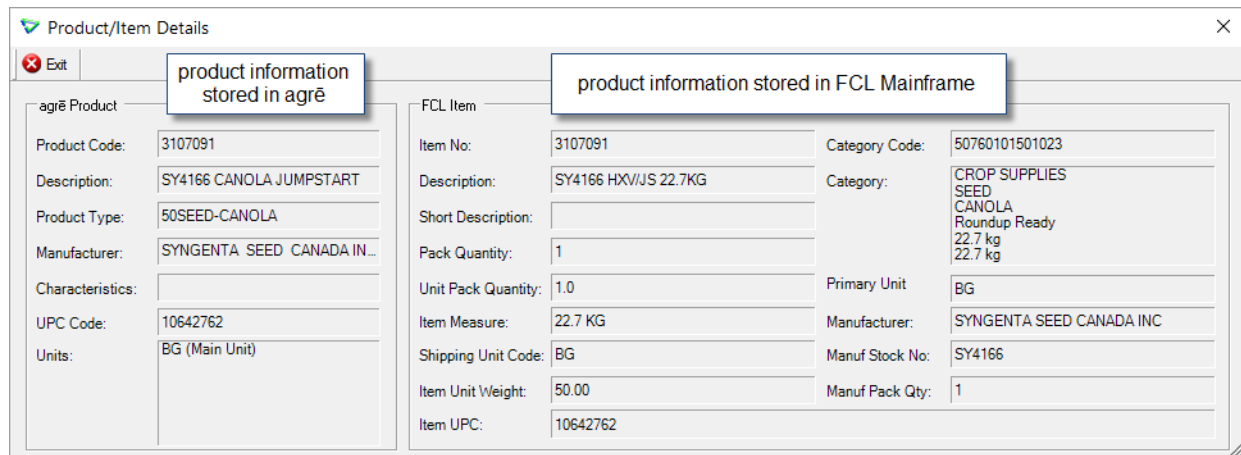
Click **Load Suggestions** to find matching FCL Items.

As there are tens of thousands of FCL items to check for a match, this could take a minute or three especially if your internet connection isn't lightning-fast. There is a **progress bar** to indicate the status of the suggestions process.

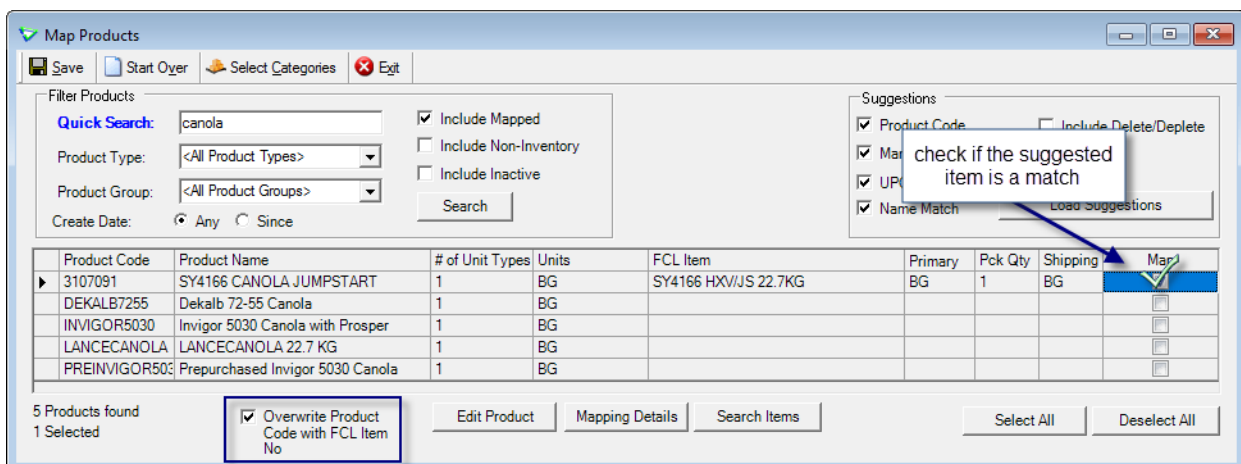
Once the suggestions have loaded, you can confirm you've got the right match before it's mapped. Select a product with a suggested item and click **Mapping Details**.



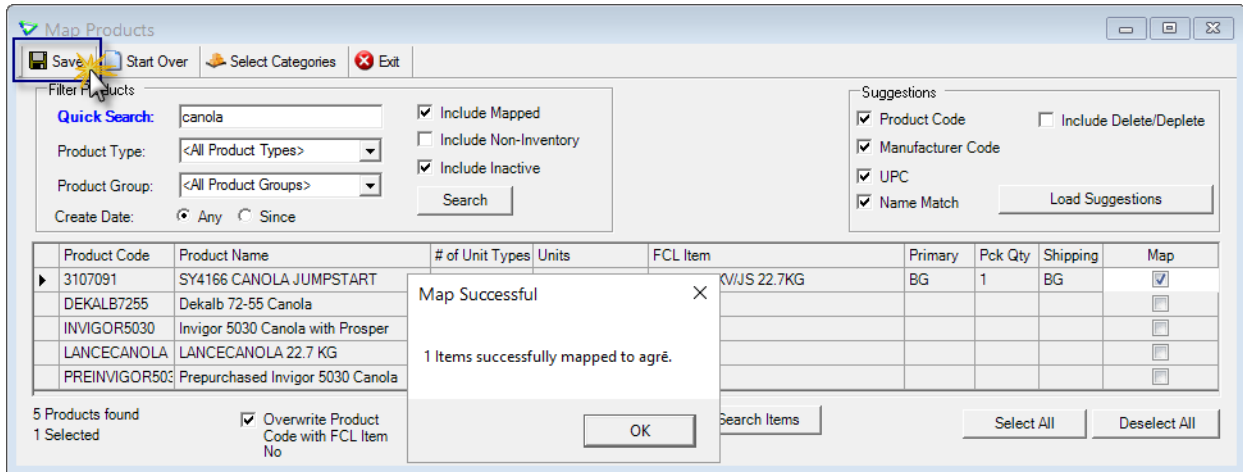
This should give you enough information to confirm if the suggested item is indeed a match.



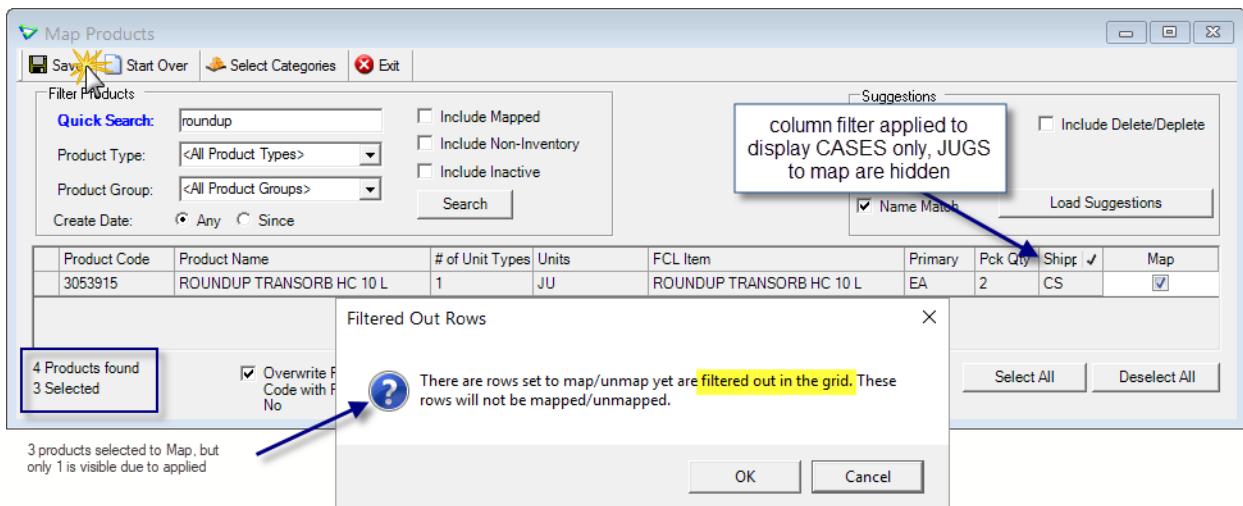
If the item is a match, check the **Map** box. If it's not a match, leave the box unchecked. Optionally leave checked **Overwrite Product Code with FCL Item Number** to replace the agrē product code (the existing Description will remain either way but can't be edited once mapped; UPC Codes are not overwritten in Setup mode).



Once you've made some matches, save the mappings.

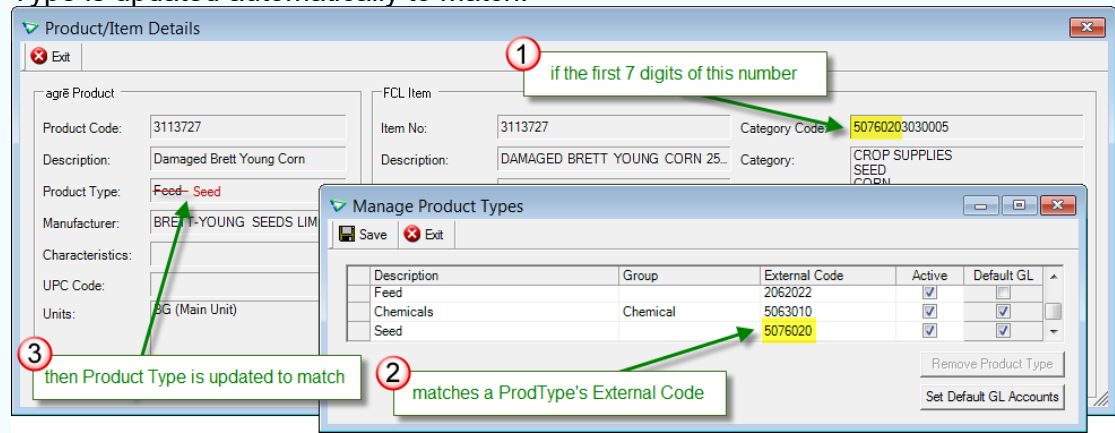


If you've checked items to Map, then subsequently used a column filter to refine the list of products you see, and at least one of the checked products is hidden by the filter, agrē warns you the hidden products will *not* be mapped. agrē will map only the items you can see.

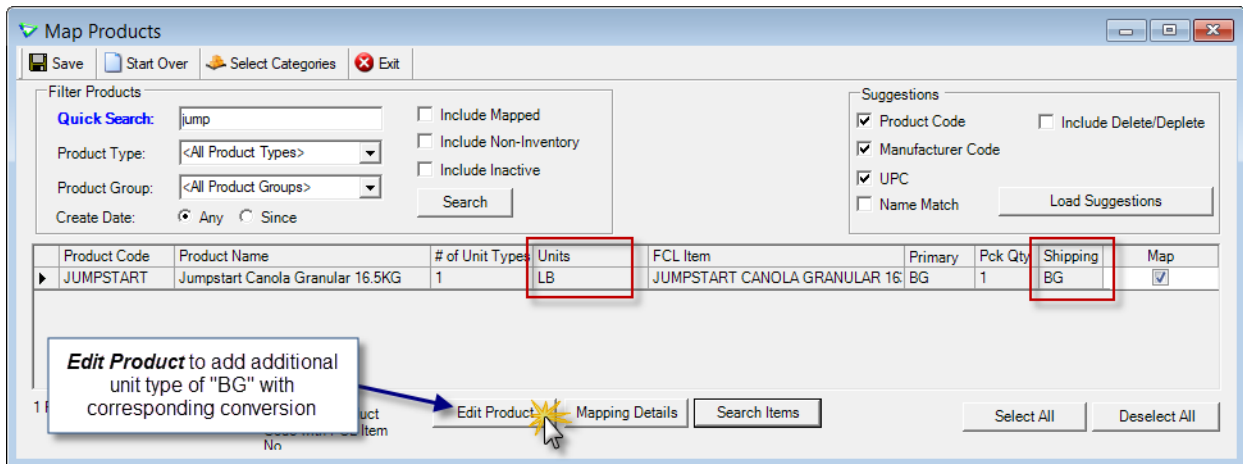


Note

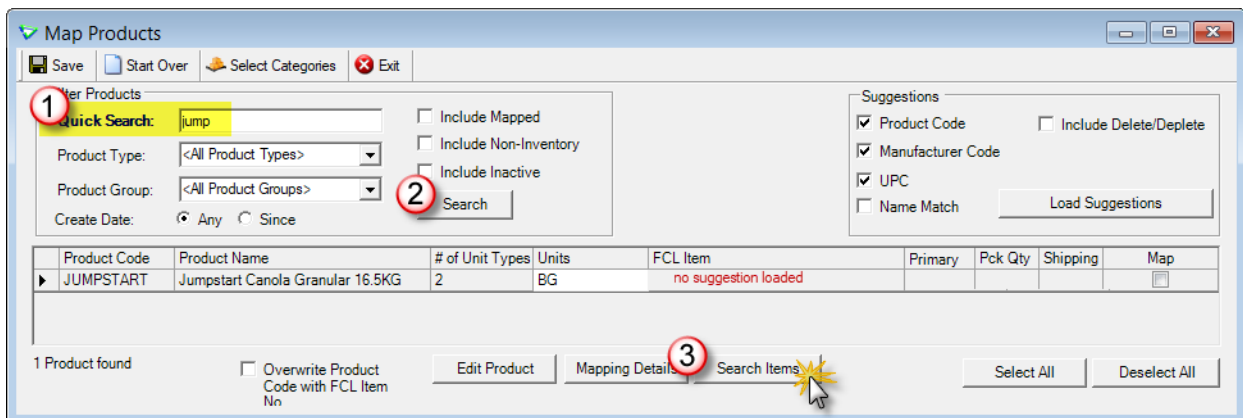
When an agrē product is mapped to an FCL Item and there is a corresponding product type where the external product type code matches the category, the Product Type is updated automatically to match.



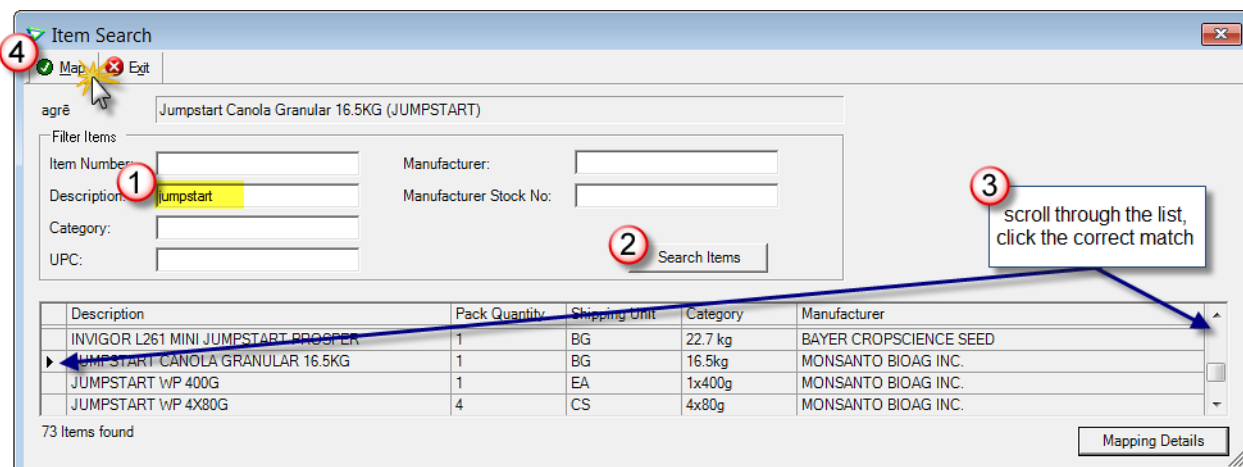
There may be an FCL Item that is *almost* a match to an agrē product, but the agrē product needs a change or an addition before it can be mapped. An example of this would be an agrē product that is missing a proper unit type match to an FCL Item. Click **Edit Product** to make the appropriate changes that will make it an exact match.



There will likely be agrē products that don't have suggested FCL Items. **Search Items** lets you search manually to find a match from the FCL mainframe.



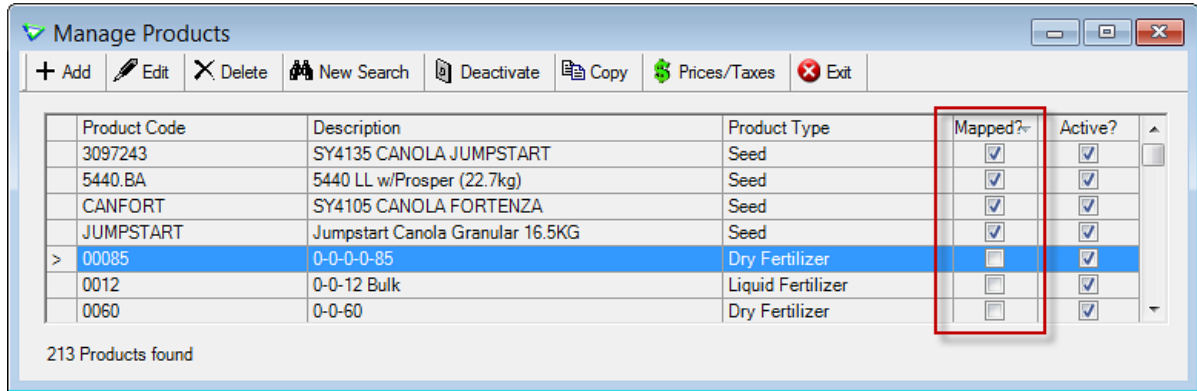
Add **Filter Items** criteria and click **Search Items** (or press Enter) for matches. Select the item that matches, click **Map** (or double-click the item).



Again, if you're not sure you can check the **Mapping Details** to confirm it's a match before you map.

Confirming Mapped Items

You can double-check which products have been mapped from the **Manage Products** home form ...



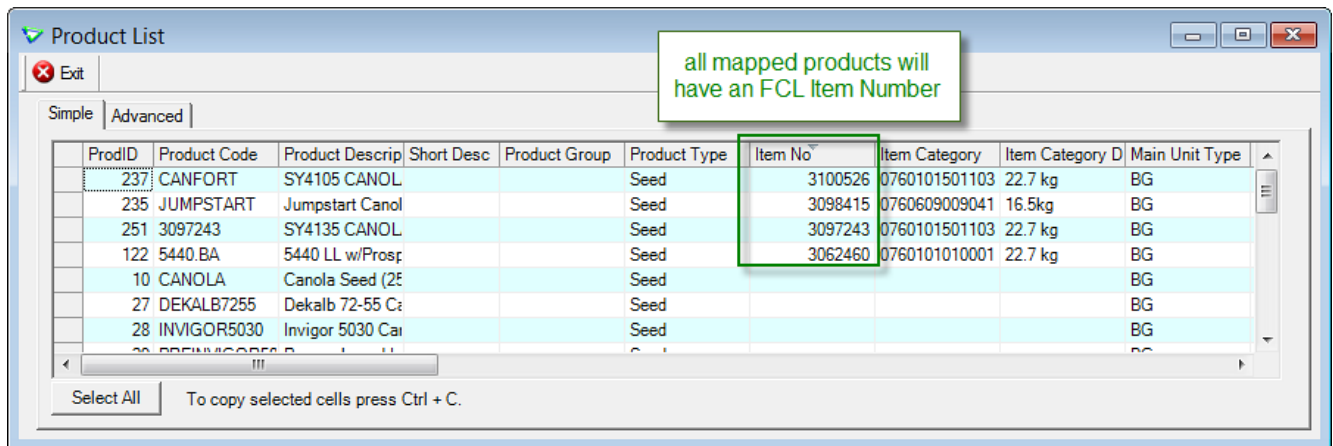
The screenshot shows the 'Manage Products' window with a table of products. A red box highlights the 'Mapped?' and 'Active?' columns. The table contains the following data:

Product Code	Description	Product Type	Mapped?	Active?
3097243	SY4135 CANOLA JUMPSTART	Seed	☒	☒
5440.BA	5440 LL w/Prosper (22.7kg)	Seed	☒	☒
CANFORT	SY4105 CANOLA FORTENZA	Seed	☒	☒
JUMPSTART	Jumpstart Canola Granular 16.5KG	Seed	☒	☒
> 00085	0-0-0-0-85	Dry Fertilizer	☐	☒
0012	0-0-12 Bulk	Liquid Fertilizer	☐	☒
0060	0-0-60	Dry Fertilizer	☐	☒

213 Products found

Inventory > Manage > Products

... and from the **Product List** data export.



The screenshot shows the 'Product List' window with a table of products. A green box highlights the 'Item No' column. A text box above the table states: 'all mapped products will have an FCL Item Number'. The table contains the following data:

ProdID	Product Code	Product Descrip	Short Desc	Product Group	Product Type	Item No	Item Category	Item Category D	Main Unit Type
237	CANFORT	SY4105 CANOL			Seed	3100526	0760101501103	22.7 kg	BG
235	JUMPSTART	Jumpstart Canol			Seed	3098415	0760609009041	16.5kg	BG
251	3097243	SY4135 CANOL			Seed	3097243	0760101501103	22.7 kg	BG
122	5440.BA	5440 LL w/Prosper			Seed	3062460	0760101010001	22.7 kg	BG
10	CANOLA	Canola Seed (25			Seed				BG
27	DEKALB7255	Dekalb 72-55 C			Seed				BG
28	INVIGOR5030	Invigor 5030 Cai			Seed				BG

Select All To copy selected cells press Ctrl + C.

File > Exports > Data | Inventory | Product List

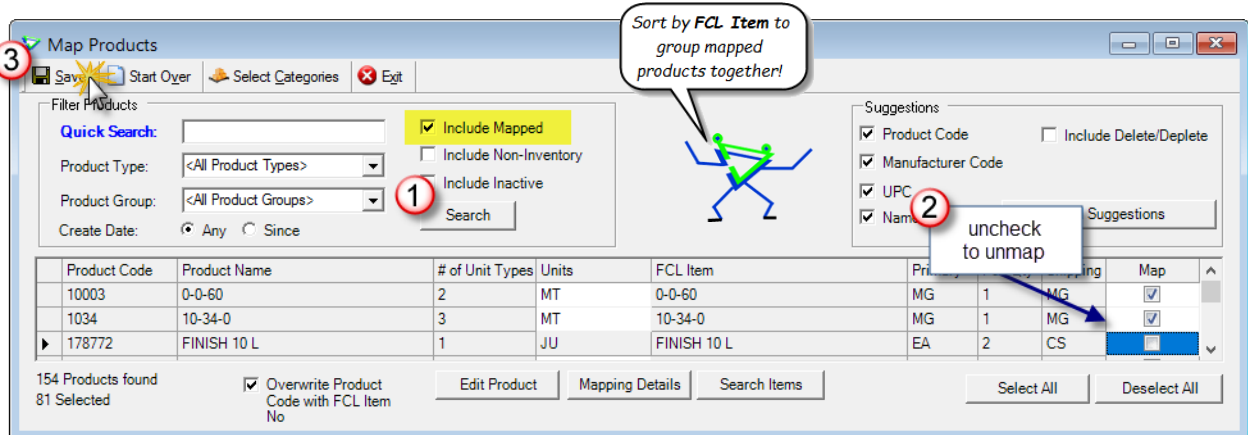
SRP Pricing for Mapped Products

SRP Pricing will be downloaded for each mapped (and re-mapped) product, but you won't see the pricing until tomorrow after the agrē sweeper runs overnight and moves the pricing information to the product. Not all FCL items have prices stored on the mainframe so you will likely need to set at least some of your own.

Unmapping Items

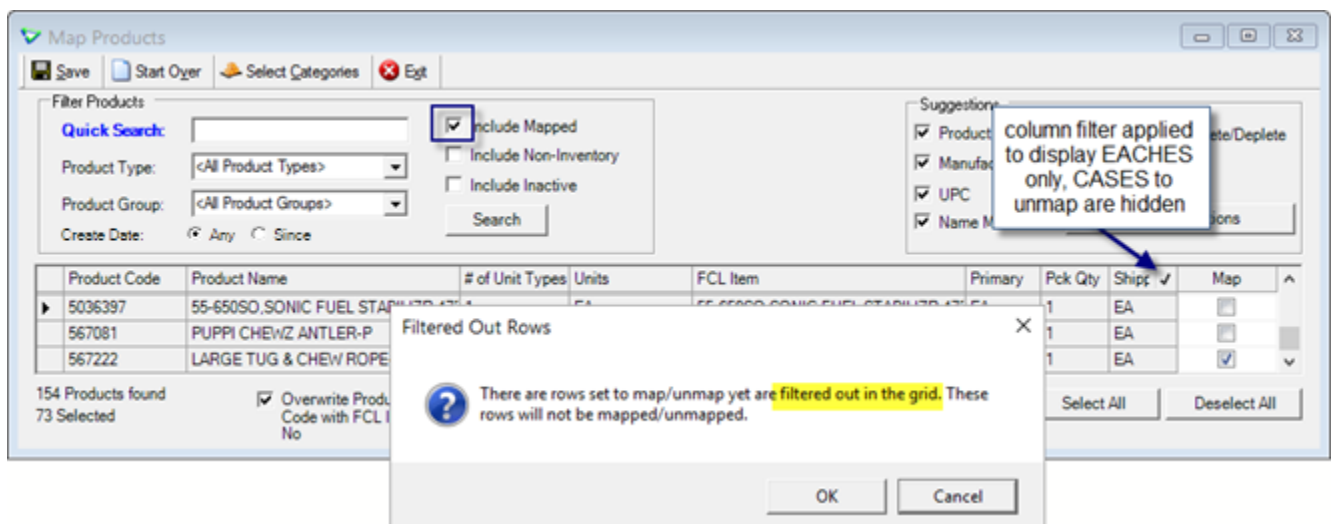
If an error was made – maybe a product was mapped to the wrong item, or the Units were incorrect, you can unmap a product easily.

Filter Products using criteria that will list the mapped products and check ***Include Mapped*** before clicking Search. Select the product you want to unmap, uncheck its Map box, and Save.



You'll see a message on **Save** telling you how many products were mapped and unmapped.

If you've unchecked items to Unmap, then subsequently used a column filter to refine the list of products you see, and at least one of the unchecked products is hidden by the filter, agrē warns you the hidden products will *not* be unmapped. agrē will unmap only items you can see.



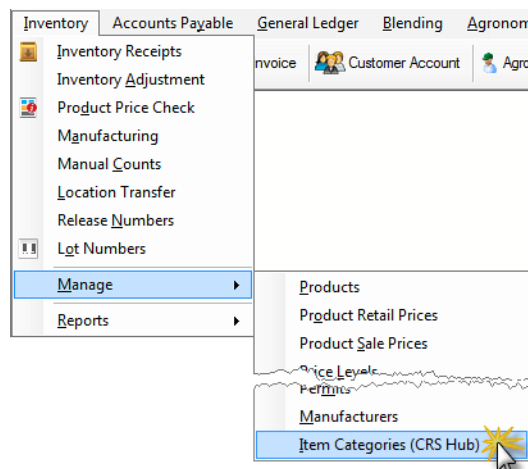
Importing FCL Mapped Items

FCL items that don't already exist in your database can be 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)**.



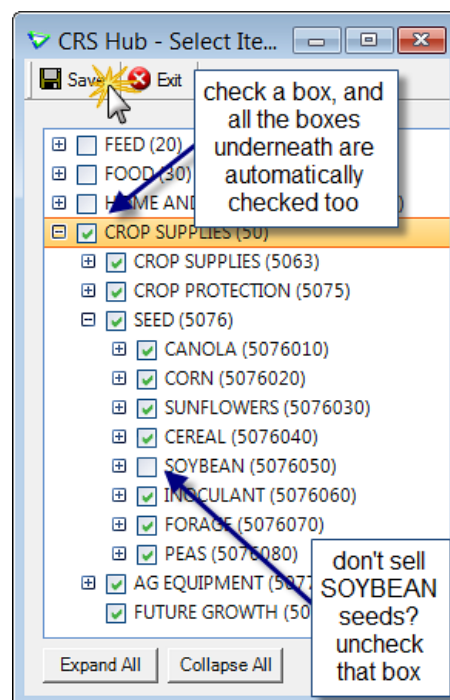
Tronix refers to this chart as a “tree” with many “branches”. Click the + and – buttons to expand and collapse a branch.

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.



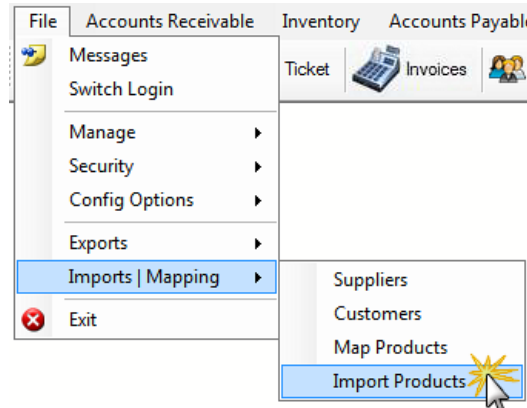
Tip

Refer to **FCL Importing Masterfiles** for more detailed instructions on importing vendors.

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 features a 'Filter Items' section with input fields for 'Item Number', 'Description' (containing 'canola'), 'Category (1)', 'Category (2)', and 'Category (3)'. There are also fields for 'Manufacturer', 'Manufacturer Stock No.', 'UPC', and a date dropdown set to 'Oct 01, 2024'. A 'Smart Link' checkbox is checked, and a callout box explains its function. A 'Retrieve Items' button is highlighted with a mouse cursor. Below the filter section is a table with columns: Import, Item No, Description, Primary, Shipping, Pack Qty, Category, and GL Sales. The table lists five items related to 'canola'. At the bottom, it states '51 Items found' with a blue arrow pointing to the 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

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 -

51 Items found

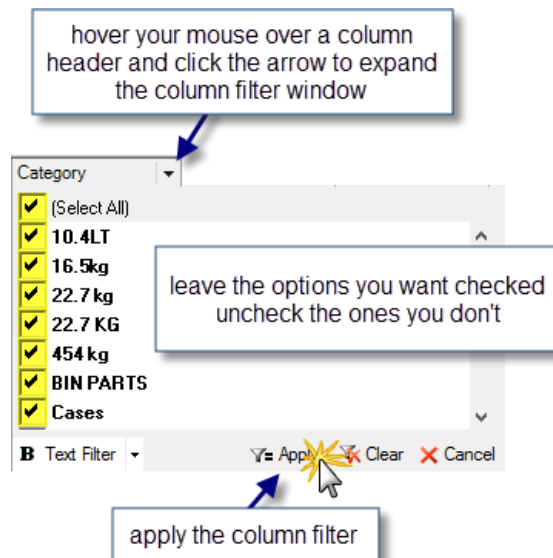
By default the results in the grid are sorted by **Description**. You can sort the data by another column by clicking on its header. Click again to sort the other way.

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 VISIVIO/FORTE	BG	BG	1	454 kg

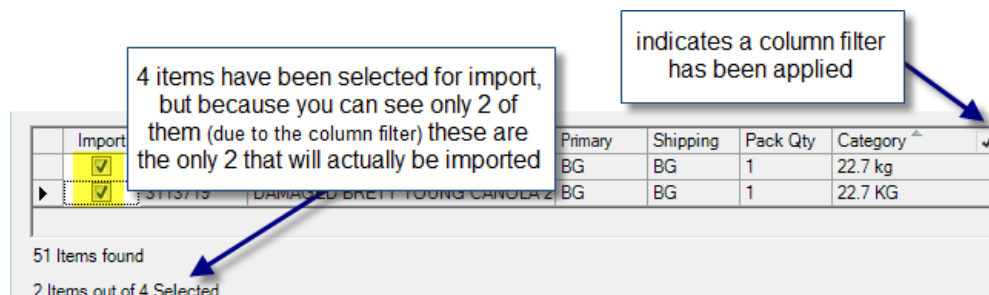
agrē retrieves all items from the FCL database that match the Filter Items - which could still be a large number.

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).



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.



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.

Import Products

Filter Items

Item Number:

Description:

Category (1):

Category (2):

Manufacturer:

Manufacturer Stock No:

UPC:

New Items ☐

☒ Smart Link

Product Update

GL Sales:

GL COGS:

GL Inventory:

GL Inv. Accrual:

click to copy these GLs down to all checked item lines with no Smart Links

click a column header to sort and group items together!

Import	Item No	Description	Primary	Shipping	Pack Qty	Category	GL Sales	GL COGS	GL Inventory	GL Inv Accrual
☒	3099231	42PHI CANOLA 10 L	EA	CS	2	Cases	45005 - Sales Cher			Chemical Accruals (CS)
☒	3129186	ACCEL CANOLA 10 L	EA	CS	2	Cases	45005 - Sales Cher			Chemical Accruals (CS)
☒	3099116	PRECEDE CANOLA 10 L	EA	CS	2	Cases	45005 - Sales Cher			Chemical Accruals (CS)
☒	3099173	RELEAF CANOLA 10 L	EA	CS	2	Cases	45005 - Sales Cher			Chemical Accruals (CS)

51 Items found

4 Selected

maximum of 500

Smart Link may default some GLs - but they can be changed

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 (as compared to which are Retail-Specific) run the **Inventory Product List** data export (File > Exports > Data). Only products with an item number, category, and category description are mapped. Sorting by Item Number groups the mapped products together.

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				
		SRP				
	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 agrē

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 CROPSOURCE INC. ...

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 a mapped 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 add characteristics, supplier codes, etc. but don't feel like you have to fill in *every* field right now. Just like when you started using agrē initially 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.

Imported items receive the same updates from the FCL mainframe as mapped items, but any information you've added yourself will not be overwritten.