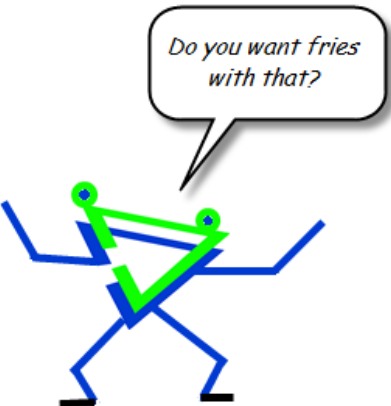


ASSOCIATED PRODUCTS



Associated Products are complementary products sold together with another product. Have you ever gone to a restaurant, ordered a hamburger, and the waiter asked if you wanted fries too? French fries are an associated product of a hamburger.

Associated Products can assist you in managing your inventory and increasing your sales.

What you'll find:

- Associated Products Overview 2
 - What are Associated Products?2
 - When would I use Associated Products?2
 - How Do Associated Products Work?.....3
- Setting Up Associated Products 4
 - Inventory Items as Associated Products.....4
 - Non-Inventory Items as Associated Products.....5
 - Associated Products for 'All Customers' or 'Only Customers with this Characteristic'6
 - Confirming the Setup of Associated Products7
- Using Associated Products 7
- Removing Associated Products 9

Associated Products Overview

What are Associated Products?

Associated products can be inventory products like drum deposits, or non-inventory products like permits (TUAs or LTAs). After you set up associated products, as you move the main product agrē will ask you if you want to move the associated products too. *You* decide when agrē will suggest the associated products. They can be suggested on work orders, loadout tickets, invoices, blends, inventory receipts, location transfers, purchase orders, and field scouts. You can verify the setup with the **Data Export** for Associated Products.

agrē can *suggest* the associated products (you'll be offered the choice of whether to use them or not) or you can make associated products mandatory (they'll be added automatically, but you can always remove them later). If there is only one associated product, you'll see a yes/no box asking if you'd like to add it. If there is more than one, agrē will present you with a checklist of all of them, and you'll choose which ones to add.

When would I use Associated Products?

Drum deposits

It's easy to forget to add a drum deposit when you're in a hurry. If you add the drum deposit as an associated product of a chemical, agrē will remind you that the two products usually go together. This keeps your drum quantities on hand more accurate.

TUAs and LTAs

You can setup TUAs and LTAs as associated products of seed to remind you that a customer will need one with every bag.

Up-selling

Want to increase your sales? Suggesting complementary products is a great way to sell more of them. That's why waiters suggest the fries – a lot of customers say yes and fry sales go up.

Anhydrous

Associated Products are one way to handle the sale of anhydrous ammonia product and up-sell your services (multiple product unit types is another). You could set up NH_3 as an inventory product, and then suggest associated services like delivery, tank rental, and kit rental. One benefit of this method is that you can track how many how many tank rentals you provided separately from how much NH_3 you sold.

Safety Supplies

You can suggest associated products such as latex gloves, safety glasses, and filter masks when selling dangerous goods or hazardous products.

Services

Suggesting soil testing, delivery or custom application when customers are ordering product is an inexpensive way to make your customers aware of complementary services that you can provide.

Kits/Programs

If you are grouping products together to sell as a “kit”, agrē reminds you which products go together so you don’t have to remember. To a base product such as seed you could add associated products for seed treatment or other services and the TUA/LTA so that no components are missed.

How Do Associated Products Work?

After you’ve identified the associated products, each time a specified transaction type takes place involving that product (e.g. a customer sale on an invoice, or an inventory receipt is created) agrē will suggest adding the associated products to your document.

Setting Up Associated Products

Inventory Items as Associated Products

Edit the “main” product. On the **Associated Products** tab, click **Add**. Type the code of the associated product.

for every unit of Liberty, suggest 1 Drum Deposit

ask for every customer, or for just some of them?

add the Drum Deposit without asking?

distribute the Drum Deposit to the same field as the Liberty?

don't flag the Drum Deposit as prepaid even if the Liberty is?

when I add Liberty to these transactions ask me if I'd like to add a Drum Deposit too (more Types are available for Inventory than Non-Inventory products)

display as Deposit on Shelf Label Report?

Inventory > Manage > Products > Associated Products tab

Select the **Units** and the **Quantity**. Specify the **Type** of documents on which you'd like agree to remind you to add the associated products.

You can specify whether the associated product should be suggested to **All Customers**, or **just to customers with a particular characteristic**.

Indicate if the associated product is **Mandatory**. Mandatory associated products are added to the selected documents automatically, but can be removed.

Indicate you want the associated product to be distributed to the same field as the parent product by checking **Copy Field(s) from Source Product**.

Help

Read more about [Product Distribution](#) in online Help.

For Invoices Only On invoices the default behaviour is an associated product inherits the prepay status of its parent product. If the associated product should *not* be flagged as prepaid

even if the parent product is prepaid, check **Don't prepay on Invoice**. This will flag the associated product as chargeable (unless overridden by a link to a prepaid work order).

Use the **Up** and **Down** buttons to change the order of the associated products. They will be presented in the same order when you're prompted to add them to work orders, inventory receipts, etc.

Click **Update** to save the association. Add additional associated products if needed and **Save** the product.

Non-Inventory Items as Associated Products

Edit the "parent" product. On the **Associated Products** tab, click **Add**. Type the code of the associated product.

Inventory > Manage > Products > Associated Products tab

Select the **Units** and the **Quantity**. Specify the **Type** of documents on which you'd like agree to remind you to add the associated products.

You can specify whether the associated product should be suggested to **All Customers**, or **just to customers with a particular characteristic**.

Indicate if the associated product is **Mandatory**. Mandatory associated products are added to the selected documents automatically, but can be removed.

Indicate you want the associated product to be distributed to the same field as the parent product by checking **Copy Field(s) from Source Product**.

Help

Read more about [Product Distribution](#) in online Help.

For Invoices Only On invoices the default behaviour is an associated product inherits the prepay status of its parent product. If the associated product should *not* be flagged as prepaid even if the parent product *is* prepaid, check **Don't prepay on Invoice** . This will flag the associated product as chargeable (unless overridden by a link to a prepaid work order).

Use the **Up** and **Down** buttons to change the order of the associated products. The will be presented in the same order when you're prompted to add them to work orders, inventory receipts, etc.

Click **Update** to save the association. Add additional associated products if needed and **Save** the product.

Associated Products for 'All Customers' or 'Only Customers with this Characteristic'

If the associated product (inventory or non-inventory) should only be offered to certain customers, assign that group of customers a common characteristic and specify that the Associated Product only be suggested for customers with that characteristic.

Edit Associated Product - Row 1

Update Refresh Exit

Product: Drum Deposit - DRUMDEP Find

Units: EA - Each

Quantity: 1.000000

Offer Associated Products

Type:

- ☒ Work Order
- ☒ Loadout Ticket
- ☒ Invoice
- ☐ Blend
- ☒ Inventory Receipt
- ☒ Location Transfer
- ☒ Purchase Order
- ☐ Field Scout

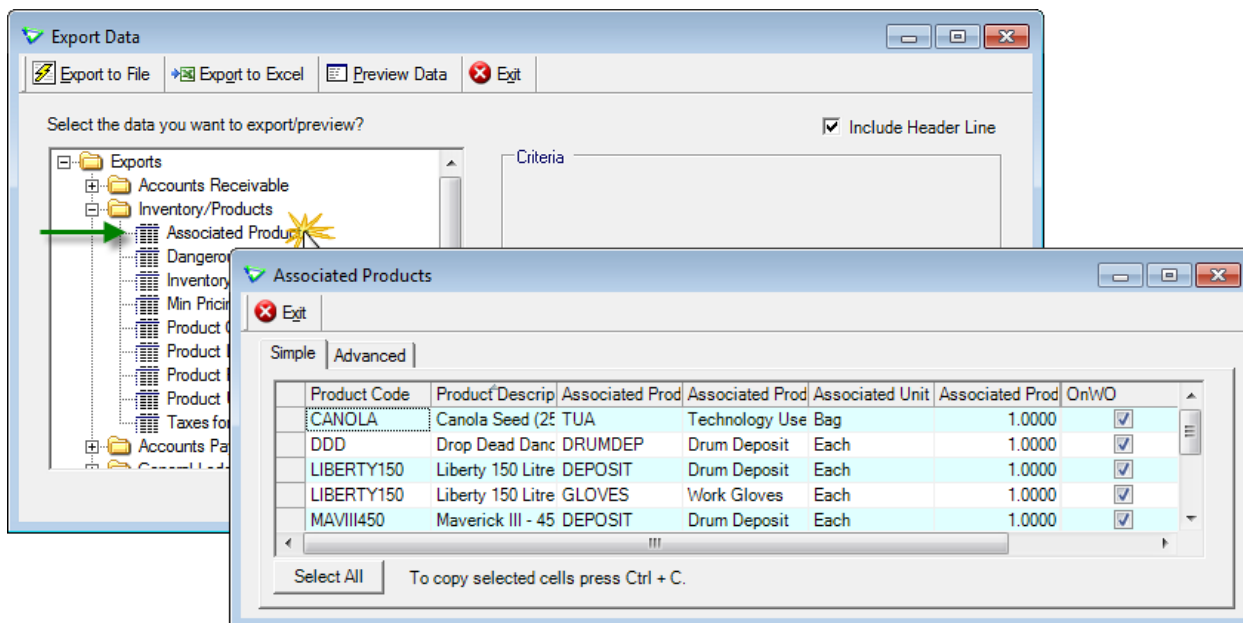
☐ All Customers

☒ Only Customers with this Characteristic:

- ☐ Ma Canola
- ☐ CarbonTaxExempt
- ☐ Cow/Calf Operator
- ☐ Grain Buyer Characteristic
- ☐ Grain Grower Characteristic
- ☐ Hay
- ☐ Livestock

Confirming the Setup of Associated Products

The **Associated Products** data export makes checking the setup much quicker than going back and editing every product to make sure you checked the right boxes.

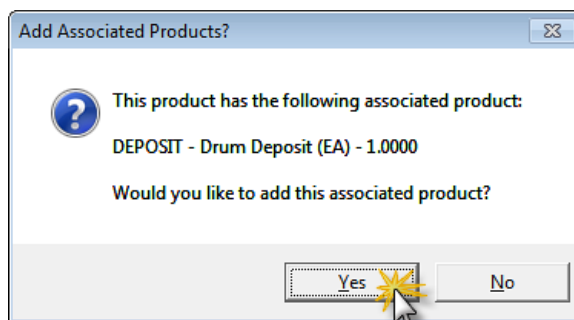


File > Exports > Data > Inventory/Products > Associated Products

Using Associated Products

When one of the checked transactions takes place, agrē will remind you to add the associated products.

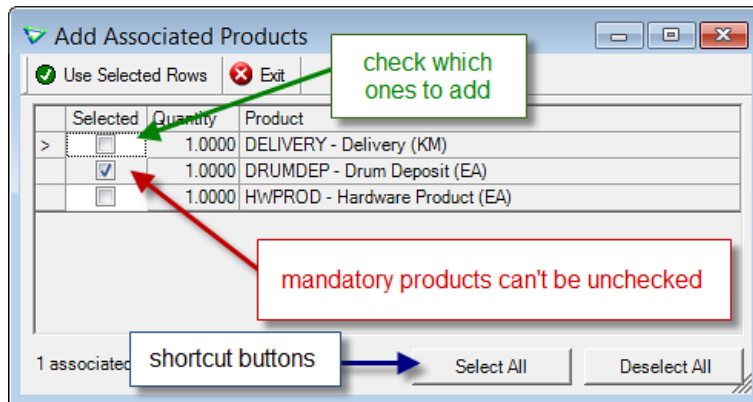
For single associated products, click **Yes** to add the associated product, or click **No** to skip it this time.



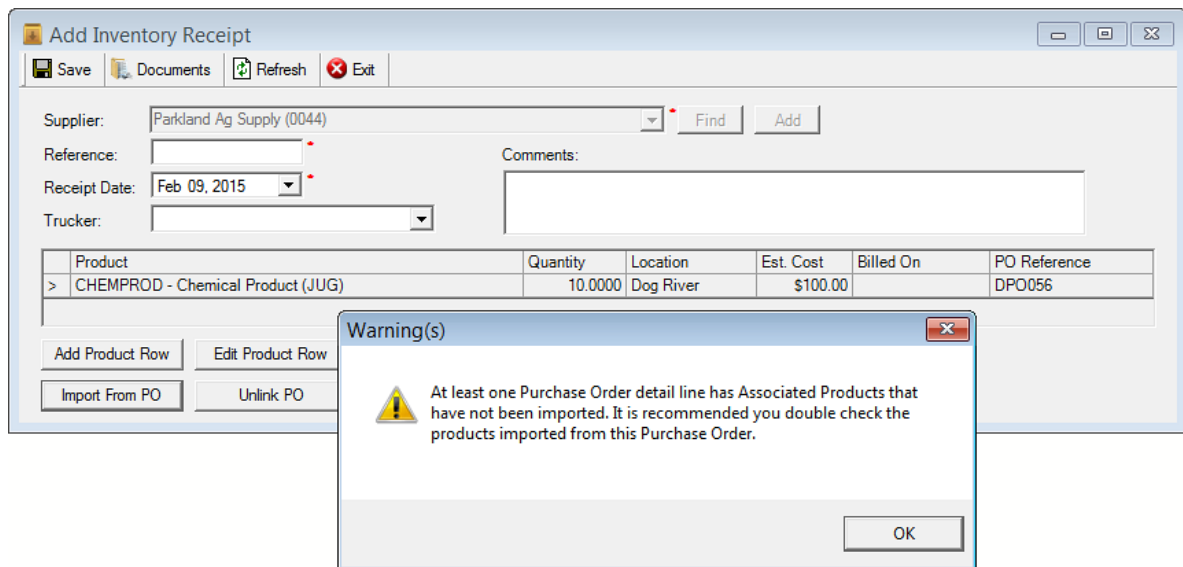
Note

If all associated products are **Mandatory**, they will be added automatically without prompting. If there is a combination of mandatory and optional associated products, the mandatory associated products will be pre-selected and can't be unchecked. They could, however, be removed manually from the transaction.

For multiple associated products, **select the associated products** you'd like to add from the list of choices



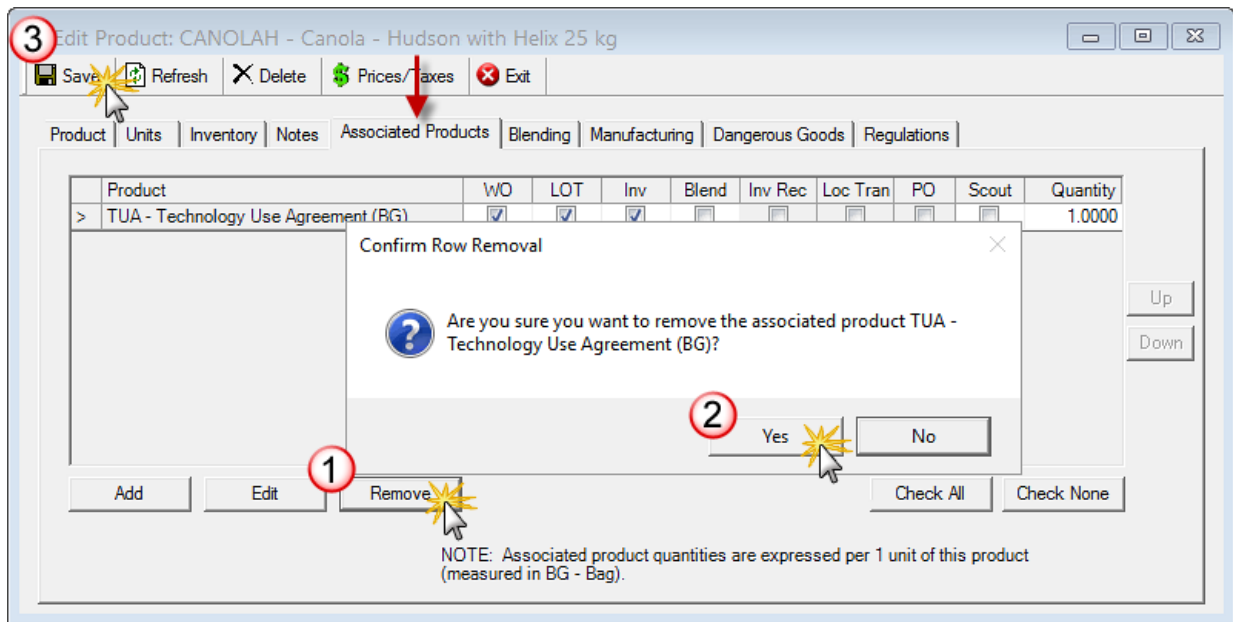
When importing from a work order or purchase order you may get a reminder that there are product rows on the same order associated with the one you just imported, but since you didn't choose to import them at the same time you might want to double check what's there.



Removing Associated Products

If you find you're often skipping the addition of an associated product, it's easy to change the main product set up and remove one or all of its associated products so that agrē will no longer suggest adding it.

Edit the "main" product. On the **Associated Products tab**, select the associated product and click **Remove**. Click **Yes** to confirm the removal.



Save the main product.