

USING A PREPAID PRICE LEVEL

Instead of “locking in” a specific prepayment price on growers’ plans now, you want to charge them the “going rate for prepaid product” when they pick up their product in the spring.

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Getting Ready to Use the Current Prepaid Price

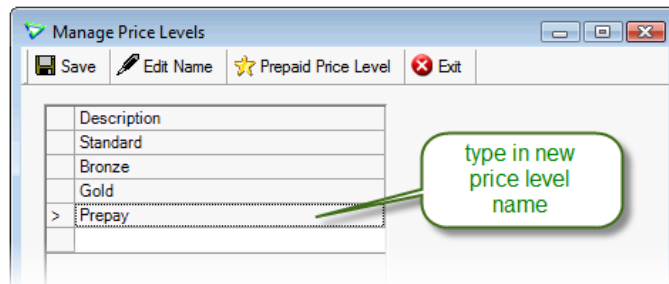
Set the Prepaid Price Level

Designate a new or an existing price level as “*the* prepaid price level”.

Note: This is something that you will do only once.

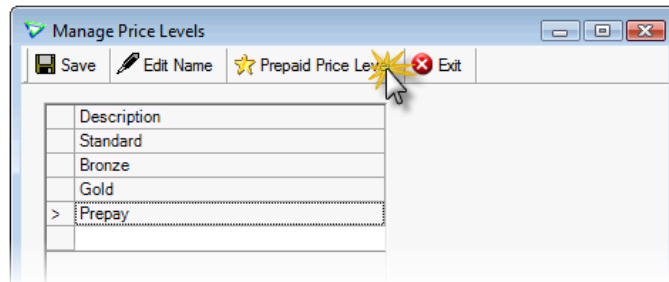
Navigate to *Inventory > Manage > Pricing > Price Levels*.

If creating a new price level to be “*the*” prepaid price level, type a *Description*.

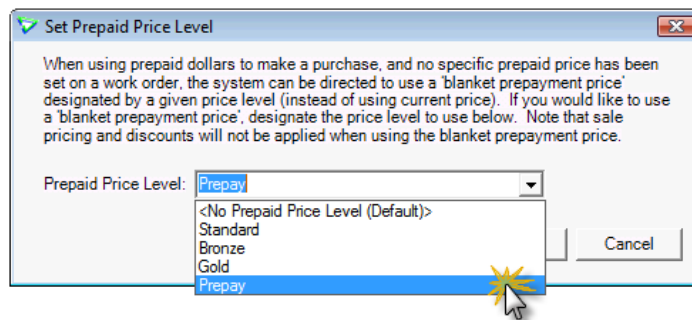


Inventory > Manage > Pricing > Price Levels

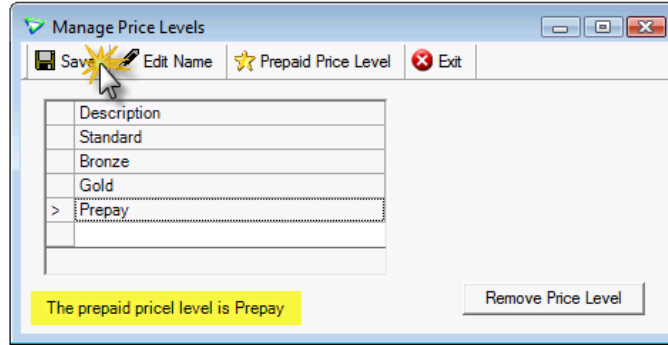
To designate which price level is *the* Prepaid Price Level click the *Prepaid Price Level* button.



Choose the price level from the drop down menu and click *OK*.



You will see visual confirmation that you've set a prepaid price level. Click **Save**.



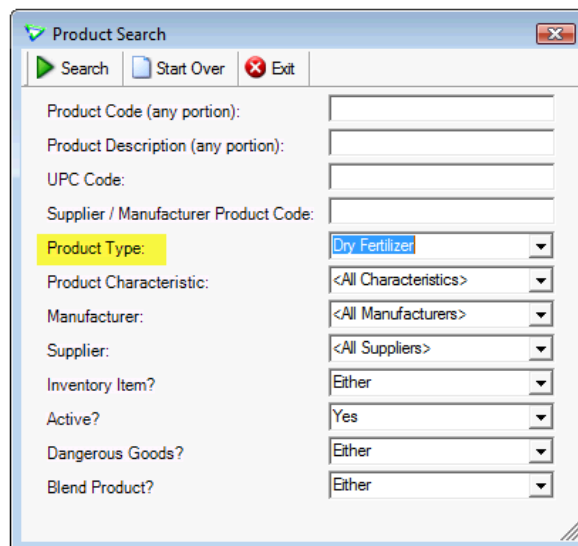
Set the Product Prepayment Prices

Now that you've got a designated Prepaid Price Level, you'll need to set some prepaid prices for your products.

Tip: This can be done at any time prior to invoicing.

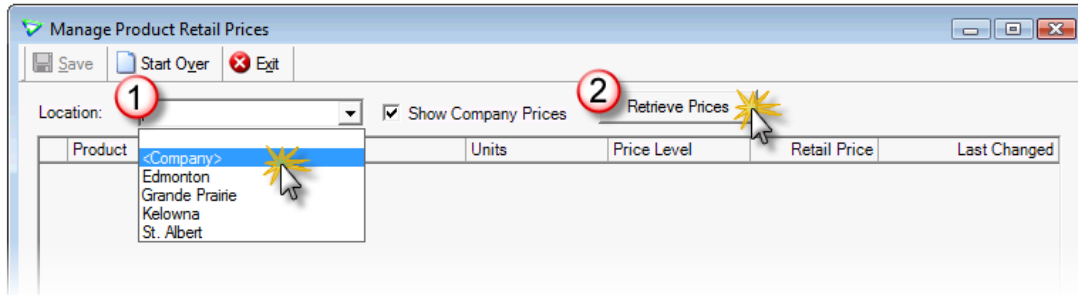
From the menu, navigate to **Inventory > Manage > Pricing > Retail Prices**.

If you want a list of all products, click **Search**. If you would like to narrow down the list of products that you want to price, choose a specific Product Type (or use another criteria) before you **Search**.



Inventory > Manage > Pricing > Retail Prices

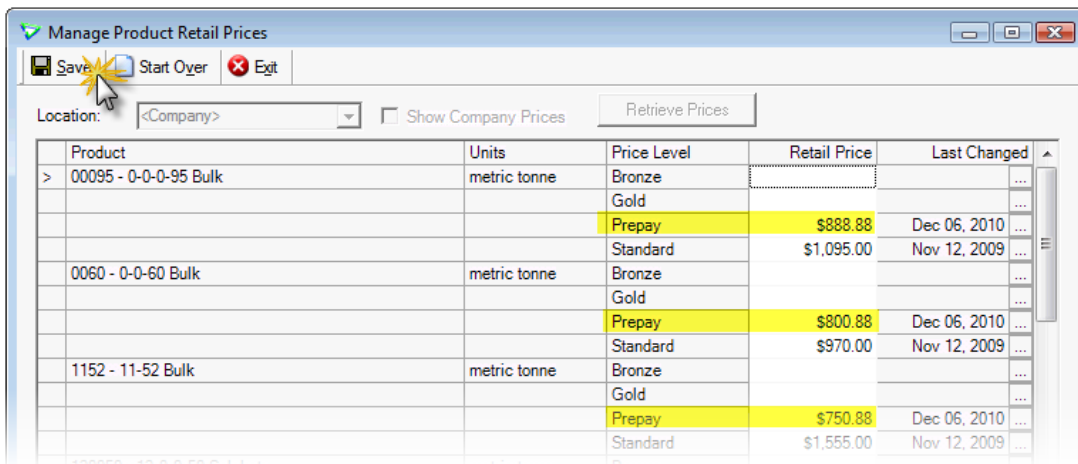
Choose the **Location** and click **Retrieve Prices**.



Inventory > Manage > Pricing > Retail Prices

Tip: If all locations will charge the same price, you can set the prepayment price at the **<Company>** Level.

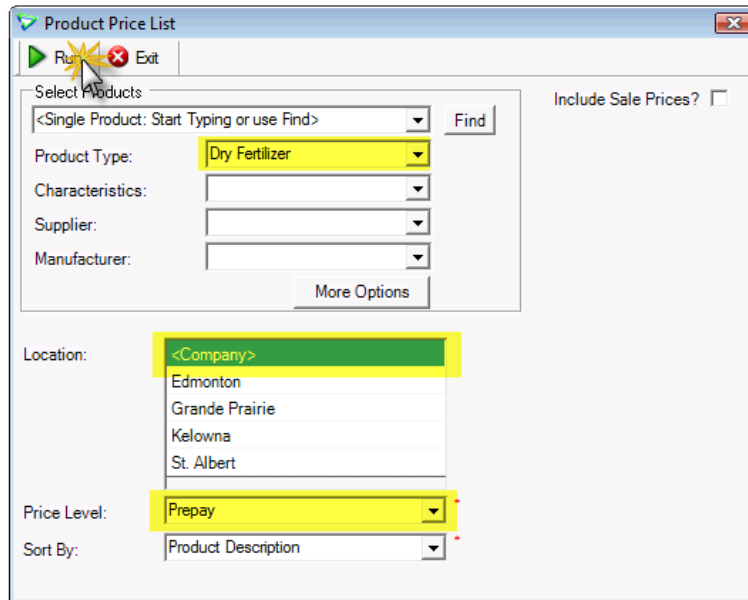
Type the prepaid price for each applicable product and **Save** your changes.



Double Check Prepaid Prices

Once you've set your prepaid prices, you can confirm accuracy using the **Product Price List** report.

From the menu, navigate to **Inventory > Reports > Product Price List**. Use additional search criteria to shorten the list of products (if applicable), choose the **prepaid price level**, and click **Run**.



Inventory > Reports

Use the results to check your prices.

Product Price List				
For <Company> and Product Type is Dry Fertilizer and Price Level is Prepay				
Product	Price Level	Location	Current Price	Units
0-0-0-95 Bulk (00095)	Prepay	<Company>	\$888.88	metric tonne
0-0-60 Bulk (0060)	Prepay	<Company>	\$800.88	metric tonne
11-52 Bulk (1152)	Prepay	<Company>	\$750.88	metric tonne
12-0-0-50 Sulphate (120050)	Prepay	<Company>	\$950.00	metric tonne
20-0-0-24 Bulk (200024)	Prepay	<Company>	\$570.88	metric tonne
46-0-0 Bulk (46)	Prepay	<Company>	\$950.88	metric tonne

Using a Prepaid Price Level on Work Orders and Invoices

For any work orders or invoices that you create now, as soon as you check the **Prepay** box the price will default to the prepaid price (you can override the price on any WO or INV if you need to).

But what if there is a lot of price volatility for products? What if you don't know what the price will be 6 or 8 months from now? You still want to track your commitments, but you're just not sure what the final price will be.

Work Orders: Flag as Use Current Prepaid Price (optional)

When adding prepaid products to work orders, you can flag them to **use whatever the current prepaid price is at invoice time** instead of typing a specific dollar amount by **checking both** the *Prepay* and the *Use Current Price on Invoice* checkboxes.

The screenshot shows the 'Add Work Order Product Row' window. The 'Product' field is '46 - 46-0-0 Bulk', 'Units' is 'MT - metric tonne', and 'Location' is 'Edmonton'. The 'Unit Price' field is empty. The 'Quantity on Hand' is 2,684.1900, 'Quantity Requested' is 25.0000, and 'Quantity Limit at this Price' is 25.0000. The 'Line Comments' field is empty. A green callout bubble points to the 'Unit Price' field with the text 'use the Current Prepaid Price'. Two checkboxes are checked: 'Prepay?' and 'Use Current Price on Invoice?'. There are also buttons for 'Pricing' and 'Inventory Details', and a 'Committed?' checkbox.

Accounts Receivable > Work Orders

Note: BOTH boxes must be checked to Use the Current *Prepaid Price* on invoices.

You'll see from the work order that the grower will get the current prepaid price.

The screenshot shows the 'Add Work Order' window. The 'Reference' field is empty, and 'Generate Reference Automatically' is checked. The 'Customer' is 'Slone, Leslie (5004)'. The 'Date Ordered' is 'Dec 15, 2010' and the 'Expiry Date' is 'Jun 30, 2011'. The 'Location' is 'Edmonton'. The 'Created By' is 'agre User' and the 'Status' is 'Active'. The 'Work Order Type' is 'Order'. The 'Service Date' and 'Comments' fields are empty. The 'No Authorization' and 'No Service Date' checkboxes are checked. A table of products is shown below:

Product	Quantity	Unit Price	Committed	Taken	Limit	Location	Status	Release	Prepay?
46 - 46-0-0 Bulk (MT)	10.0000		<input checked="" type="checkbox"/>	0.0000	10.0000	Edmonton	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1152 - 11-52 Bulk (MT)	5.0000		<input checked="" type="checkbox"/>	0.0000	5.0000	Edmonton	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
> 0060 - 0-0-60 Bulk (MT)	2.0000		<input checked="" type="checkbox"/>	0.0000	2.0000	Edmonton	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Two green callout bubbles point to the 'Unit Price' and 'Prepay?' columns. The first bubble says 'no price specified so will use current price' and the second says 'also flagged as prepaid so will use curent prepaid price'. At the bottom right, the 'Total: (before tax)' is \$0.00.

Caution When a customer has prepaid products with no specific prices listed on their prepayment plan/work orders, agrē cannot accurately calculate how much the customer is **over** or **under** allocated.

Customer Prepayment

Dec 15, 2010 to Jan 24, 2011

Slone, Leslie (5004)
Box 459
St. Albert, AB T8N 2K3
780-459-8890

Opening balance as of Dec 15, 2010	\$47,100.00
Net deposits and transfers	\$0.00
Net withdrawals	\$0.00
Net prepayment as of Jan 24, 2011	\$47,100.00
Less: Remaining on work orders	\$0.00
Less: Pending withdrawals	\$0.00
Unallocated / (Over Committed)	\$47,100.00

Prepayment Plan

Product	Date	Reference	Requested	Limit	Taken	Remaining	Unit Price	Allocated
0-0-60 Bulk - metric tonne	Dec 15, 2010	W0E012	2	2	0	2	\$0.00	\$0.00
11-52 Bulk - metric tonne	Dec 15, 2010	W0E012	5	5	0	5	\$0.00	\$0.00
46-0-0 Bulk - metric tonne	Dec 15, 2010	W0E012	10	10	0	10	\$0.00	\$0.00

Accounts Receivable > Reports

Invoices: Getting the Current Prepaid Price

Linking to a Work Order

When you create the grower's invoice, you'll import the loadout ticket (or add products directly) ...

Blend Name: 32.9-10.9-6.9-0.2 Blend Description:

Nutrient Requirements:

Nutrient	lb per acre
> N - Nitrogen	33.2
P - Phosphorus	11.0
K - Potash	7.0
S - Sulphur	0.3

Field Size (acre): 218.28
Broadcast Rate (lb per acre): 101
Blend Quantity (MT): 10.00
Density: 52.9

Products in Blend:

Product	Quantity	Percent	Price	WO Ref	Prepay?
> 46 - 46-0-0 Bulk	6.61	65.99%	980.00		No
1152 - 11-52 Bulk	2.11	21.11%	1,555.00		No
0060 - 0-0-60 Bulk	1.16	11.64%	970.00		No
200024 - 20-0-0-24 Bulk	0.12	1.24%	595.00		No

Blend Total Price: \$1,095.4306
Subtotal: \$10,954.31
Add'l Prod. Total: \$0.00
Add'l Prod Taxes: \$0.00
Total: \$10,954.31
Price per acre: \$50.18

Buttons: Cost Details, Auto Link, Pricing, Reset Prices, Adjust Actuals, Recalculate Blend

Accounts Receivable > Invoices > Add Blend Row

Tip: Using **Auto Link** is a fast way to link to the oldest prepaid work order first, but you can also click the **Pricing** button to choose to link to a particular work order.

...then link them back to work orders to get any special prepaid pricing. After you link products on invoices or loadout tickets back to the work orders, agrē will default to the current prepaid price.

Blend Name: 32.9-10.9-6.9-0.2 Blend Description:

Nutrient Requirements:

Nutrient	lb per acre
> N - Nitrogen	33.2
P - Phosphorus	11.0
K - Potash	7.0
S - Sulphur	0.3

Field Size (acre): 218.28
Broadcast Rate (lb per acre): 101
Blend Quantity (MT): 10.00
Density: 52.9

Products in Blend: Prepay Blend

Product	Quantity	Percent	Price	WO Ref	Prepay?
> 46 - 46-0-0 Bulk	6.61	65.995	950.88	WOE012	Yes
1152 - 11-52 Bulk	2.11	21.113	750.88	WOE012	Yes
0060 - 0-0-60 Bulk	1.16	11.644	800.88	WOE012	Yes
200024 - 20-0-0-24 Bulk	0.12	1.248	595.00		No

Blend Total Price: \$886.7466
Subtotal: \$8,867.47
Add'l Prod. Total: \$0.00
Add'l Prod Taxes: \$0.00
Total: \$8,867.47
Price per acre: \$40.62

Buttons: Cost Details, Auto Link, Pricing, Reset Prices, Adjust Actuals, Recalculate Blend

Accounts Receivable > Invoices > Add Blend Row

When a Customer has No Work Order

If the customer has deposited prepaid funds on account and should get prepaid pricing, but has no work orders to link to, you just need to flag the items on the invoice as Prepaid and they'll get the prepayment price automatically.

Blend with No Work Order

Click the *Prepay* checkbox to get the current prepaid price.

Before Prepay Blend

Nutrient	lb per acre
N - Nitrogen	33.2
P - Phosphorus	8.0
K - Potash	0.0
> S - Sulphur	6.0

Field Size (acre):	Fields
	737.65
Broadcast Rate (lb per acre):	
	98
Blend Quantity (MT):	
	32.79
Density:	
	52.4

Product	MT	Percent	Price	WO Ref	Prepay?
> 46 - 46-0-0 Bulk	19.19	58.496	980.00		No
1152 - 11-52 Bulk	5.18	5.811	1,555.00		No
200024 - 20-0-0-24 Bulk	8.42	25.693	595.00		No

Blend Total Price: \$971.9952
 Subtotal: \$31,871.72
 Add'l Prod. Total: \$0.00
 Add'l Prod Taxes: \$0.00
 Total: \$31,871.72
 Price per acre: \$43.21

After Prepay Blend

Product	MT	Percent	Price	WO Ref	Prepay?
> 46 - 46-0-0 Bulk	19.19	58.496	950.88		Yes
1152 - 11-52 Bulk	5.18	5.811	750.88		Yes
200024 - 20-0-0-24 Bulk	8.42	25.693	570.88		Yes

Accounts Receivable > Invoices > Add Blend Row

Straight Product with No Work Order

Click the **Prepay** checkbox to get the current prepaid price.

The screenshot shows the 'Add Invoice Purchase Row' dialog box. The top section shows the initial state: Product: ACHIEVE - Achieve Liquid Gold, Units: CSE - case, Location: St. Albert, Quantity: 3.0000, Unit Price: \$554.00, and Line Total: \$1,662.00. A green box highlights the Unit Price field with the text 'unit price BEFORE prepay'. The bottom section shows the state after clicking the 'Prepay?' checkbox: Quantity: 3.0000, Unit Price: \$495.00, and Line Total: \$1,485.00. A red box highlights the Unit Price field with the text 'unit price AFTER prepay'. A blue arrow points from the 'Prepay?' checkbox in the top section to the 'Prepay?' checkbox in the bottom section.

Accounts Receivable > Invoices

Caution If first you specify a **Unit Price** and then check the **Prepay** box to use prepay funds from the customer's account, your price will be overwritten by the **Prepaid Price**.

If you want to use prepay funds, but don't want to give the customer the standard prepaid price, you will need to manually change it after checking the **Prepay** box.

Prepaid Price Level Rules of Engagement

If there is no price set at the Prepaid Price Level, the price will default to the current retail price.

A specified Current Prepaid Price is **not affected** by:

- any product sale prices (e.g. snow shovels on sale during the month of July)
- any discount group pricing (e.g. Friends and Family get 5% off)