

EXPORTING SALES DATA FOR AGCOLLECT

If your company provides sales information to **AgCollect**, you can easily export and email the EMR (Electronic Manufacturer Report) sales information you have recorded in agrē. The agrē **AgCollect Export** includes sales (on invoices) and sales-to-be (on work orders) to eligible customers of products flagged as “AgCollectable”.

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How does agrē know what sales information to include?

agrē knows which **products** AgCollect is interested in by their **Manufacturer**. In conjunction with AgCollect, Tronia maintains a list of manufacturers that participate in the program and only sales data for products associated with AgCollect manufacturers will be exported.

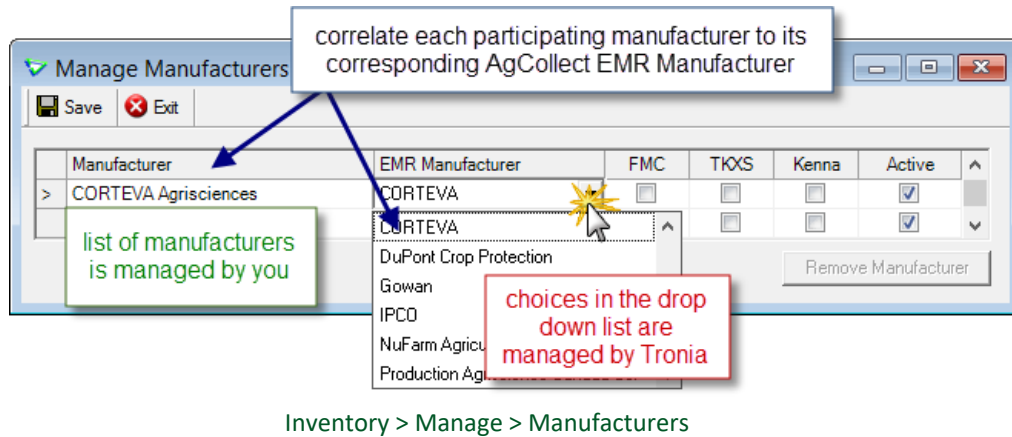
Participating AgCollect Manufacturers

- Aquatrols Corporation
- Belchim Crop Protection Canada
- Brett Young
- CORTEVA
- DuPont Crop Protection
- Gowan
- IPCO
- NuFarm Agriculture
- Nuseed Global
- Production Agriscience Canada Co.
- UPL AgroSolutions Canada Inc.

By default, agrē will export AgCollect sales data of EMR **products** to all **customers** unless you have specified to **exclude** them. You can also combine sales results for multiple customers by setting up **Customer Associations**.

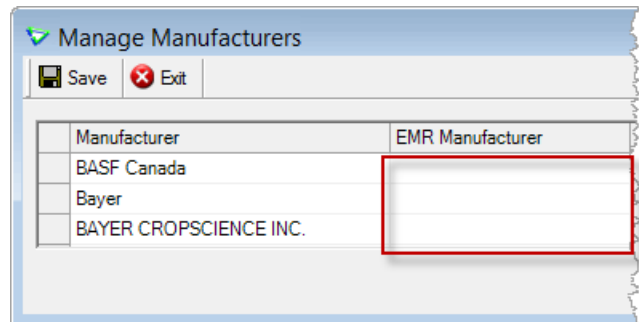
Setting Up AgCollect Manufacturers

Start by confirming your list of **Manufacturers** is accurate. Each participating manufacturer needs to be associated with its corresponding AgCollect **EMR Manufacturer**.



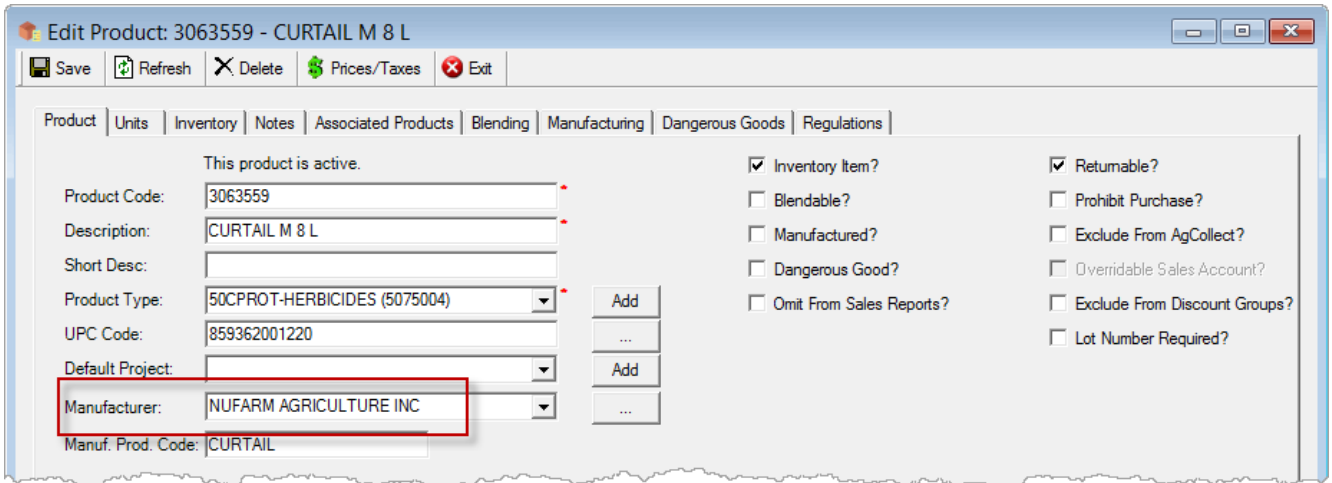
Note You can spell the **Manufacturer** name however you like. It does not need to be an exact match to the **EMR Manufacturer** name.

As **not every manufacturer participates** in the AgCollect program, you will likely have manufacturers with no EMR Manufacturer selected. Sales data for their products will not be included in the **AgCollect export**.



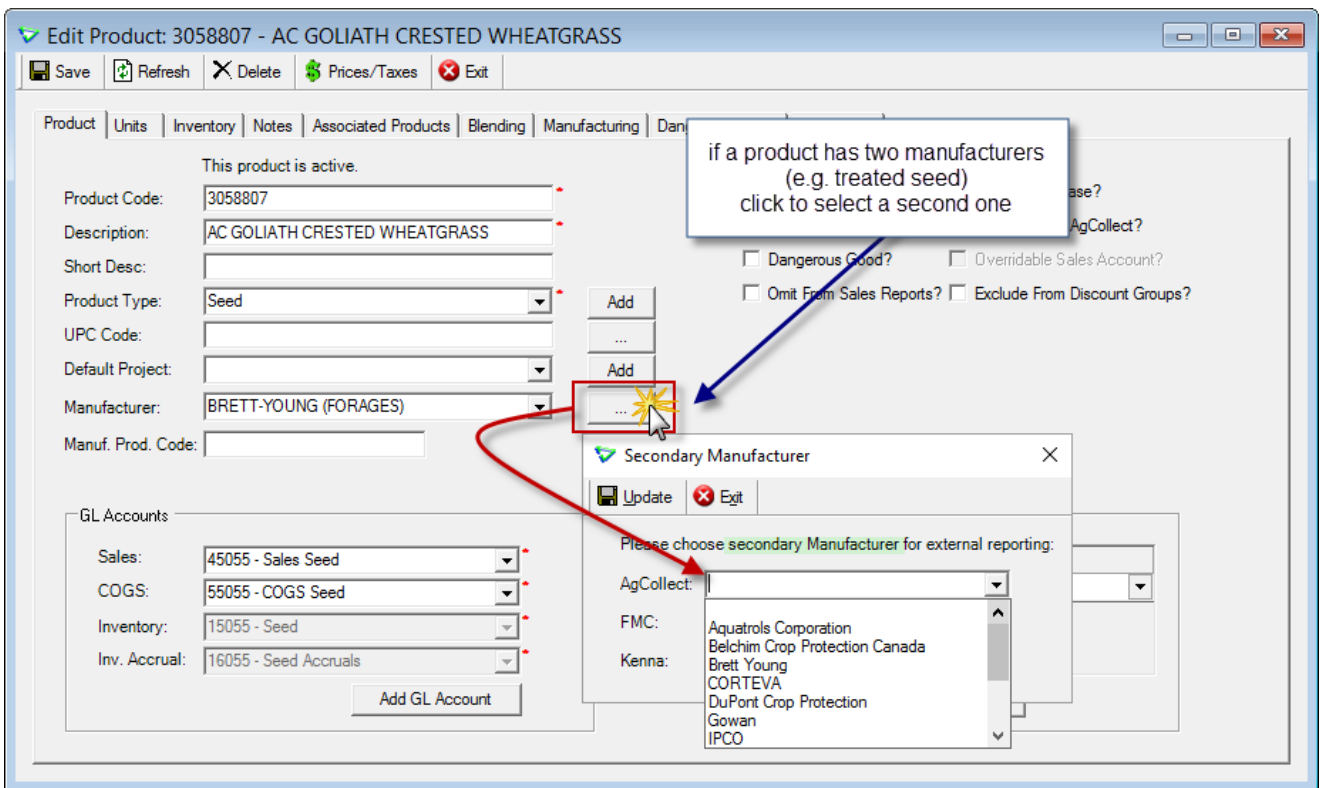
Setting Up AgCollect Products

Each reportable product must be tagged with an AgCollect manufacturer to have its sales included.



Inventory > Manage > Products

For products that have **two AgCollect manufacturers** (treated seed, for example) you can indicate the second one by clicking more options [...] next to **Manufacturer**, then selecting it from the drop-down menu.

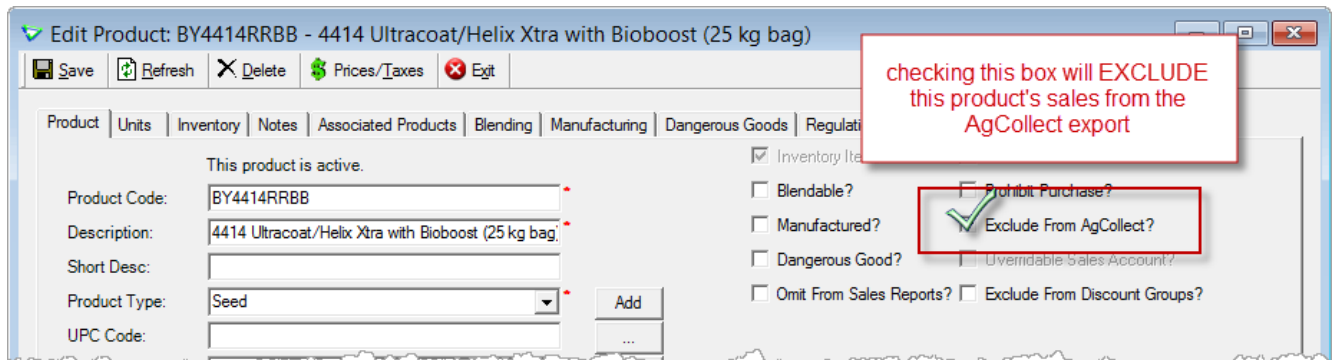


Inventory > Manage > Products

Both manufacturers will be included in the export.

Excluding Sales Data for Specific Products

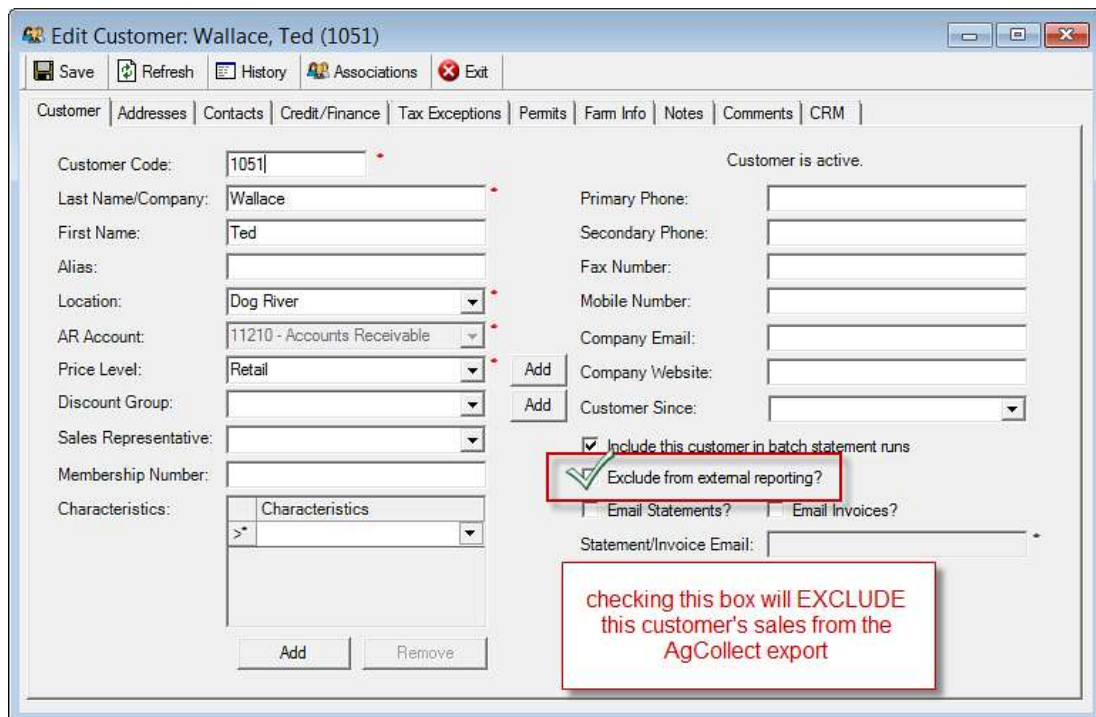
Products from EMR manufacturers that do *not* need to be reported to AgCollect (like demo seed, or last year's chemical) can be excluded from the results.



Inventory > Manage > Products

Excluding Sales Data for Specific Customers

Customers whose sales data should *not* be included in the AgCollect export should be flagged as **Exclude from external reporting**.



Accounts Receivable > Manage Customers

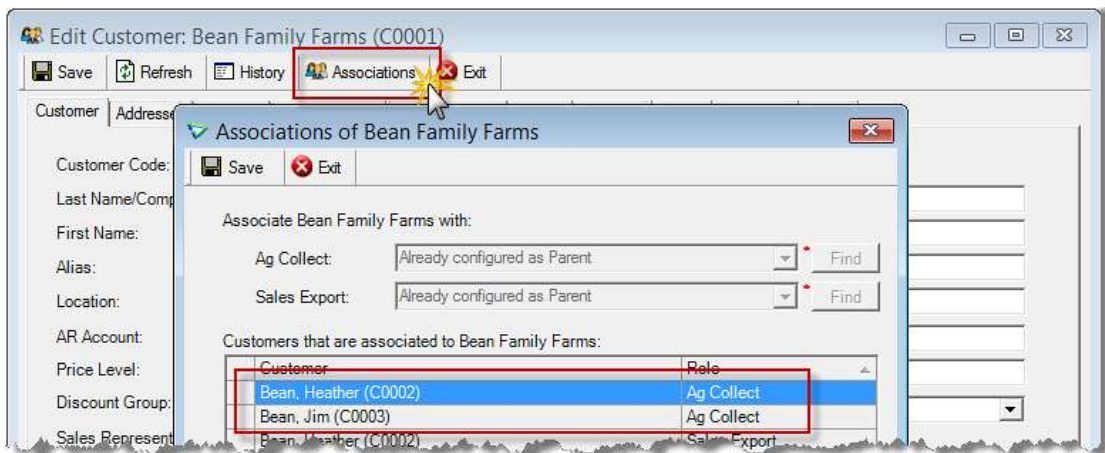
Combining Sales Data from Multiple Customers

Setup customer **Associations** to combine sales results for multiple customers. In this example, all AgCollect sales for Heather Bean will be rolled up and added to sales for Bean Family Farms.



Accounts Receivable > Manage Customers

Viewing the **Associations** for Bean Family Farms tells you whose results will be combined under that account.

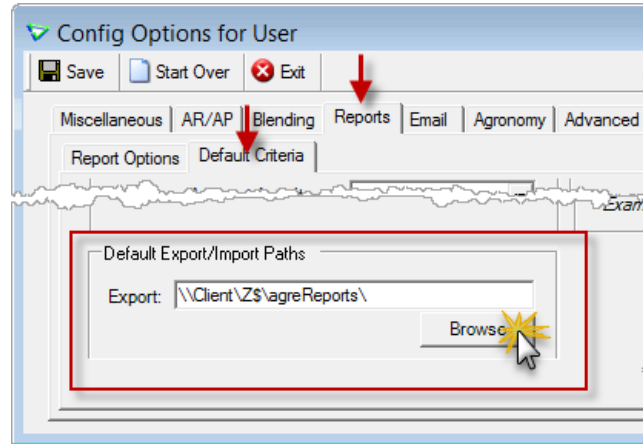


Sales for Bean Family Farms *and* Heather Bean *and* Jim Bean will be combined on the export and reported under the name of Bean Family Farms. No individual sales will be reported for the child accounts – so you won't see Heather's and Jim's names listed in the export file.

Default Destination Folder (optional)

Select a **Default Export Path** for the exported data files.

You can always change the destination on the fly if you want a certain one to be exported to a different path.



File > Config Options >Users

Help

Please refer to **File > Exports > Data Exports > Hosted Users: Selecting a Destination for Exported Files** in online Help for more information about choosing a destination folder when exporting data. It must be available *outside* of agrē.

Exporting and Emailing AgCollect EMR Information

To export AgCollect EMR information

- Navigate to **File > Exports > AgCollect EMR**.
The **AgCollect Export** window opens.

File > Exports > AgCollect EMR

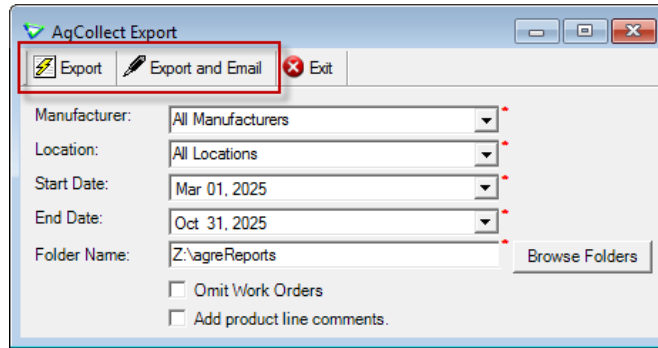
- In the **Manufacturer** box, enter the manufacturer of the sales you are reporting (or all manufacturers).
- In the **Location** box, enter the location of the sales you are reporting (or all locations).
- In the **Start Date** box, optionally change the start date of the sales data you are reporting. All sales and orders made on or after this date (up to the end date) are exported. One week before today's date is selected by default.
- In the **End Date** box, optionally change the end date of the sales you are reporting. All sales and orders made between the start date and this date are exported. Today's date is the default.
- Click **Browse Folders** to select a [destination folder](#).

Help

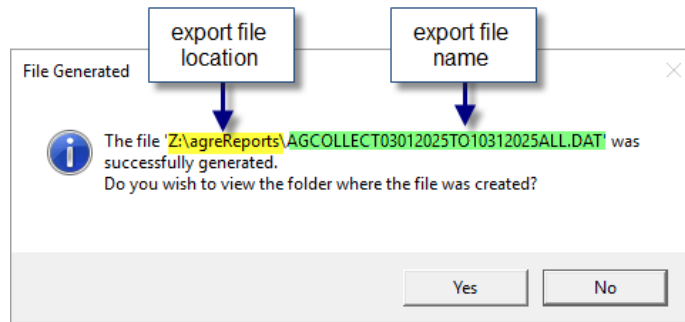
Please refer to **File > Exports > Data Exports > Hosted Users: Selecting a Destination for Exported Files** in [online Help](#) for more information about choosing a destination folder when exporting data. It must be available *outside* of agrē.

- Check **Omit Work Orders** to exclude both *Work Orders - Early Booking* [committed but not prepaid] and *Work Orders - Prepay* [committed and prepaid].
- (optional) Check **Add product line comments** to include Invoice product row comments.

- Click **Export** to create the file, or click **Export and Email** if you want to email the information immediately after exporting it.



- If you clicked **Export** a message appears indicating the export was successful, and it asks you if you want to view the folder containing the exported file. Click **Yes** to view the folder, or click **No** to close the window.

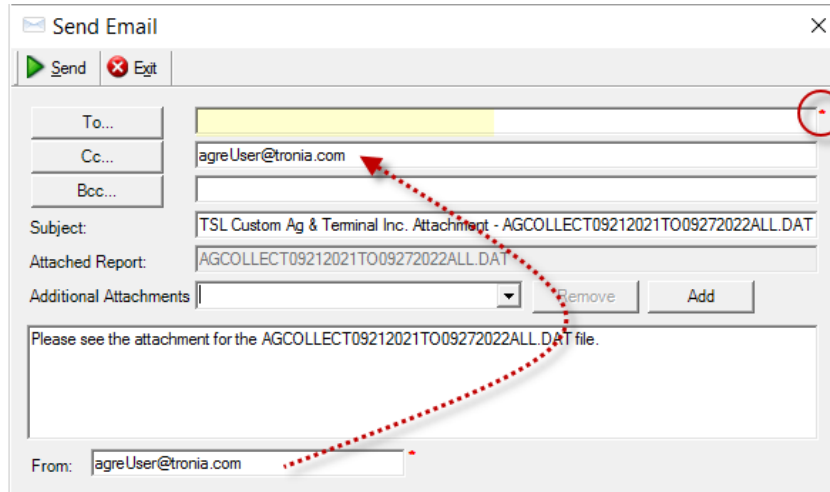


Caution The .DAT file generated by agrē is in comma-separated value format (data columns are separated by a “pipe” | =- Shift + \) and can be viewed in an external program like Microsoft Excel. The **keyword here is “viewed”**. If any changes are made to the DAT file, including changing the file name, it may be rejected by the AgCollect import process or be imported incorrectly.

Note If you are using **Customer Associations**, combined sales results will be listed only under the "parent" account. Individual "child" account sales (which were rolled up to the parent account) will not be listed.

- If you clicked **Export and Email**, a message appears indicating the export was successful, and it asks you if you want to view the folder containing the exported file. Click **Yes** to view the folder, or click **No** to close the window.

- The **Send Email** window opens.



- In the **To** box, enter the email address to which the AgCollect EMR information should be sent. At least one recipient address is required.
- In the **CC** or **BCC** box, optionally type your own email address to send yourself a copy or a blind copy.
- The default **Subject** identifies your company and the export file name, but it can be changed.
- **Attached Report** The AgCollect export file is attached automatically.
- **Additional Attachments** Optionally click Add to attach additional files.
- In the message text box, enter any additional information you want the recipients of the message to read.
- In the **From** box, optionally change the email address you want the AgCollect EMR email to be sent from.
The email address you specified in your [user configuration](#) settings is entered by default but you can change it.
- Click **Send**.
The email is sent, the **Send Email** window closes, and you're back at the AgCollect **Export** window.
- Click **Exit** to close the window.