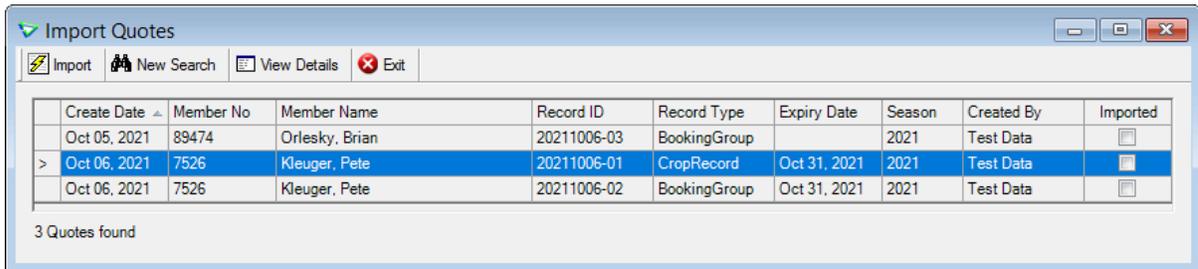


# IMPORTING FROM DIGITAL AG

Use **Import Digital Ag** and turn bookings and crop records from Agrian into Quotes/Work Orders in agrē.



## What you'll find:

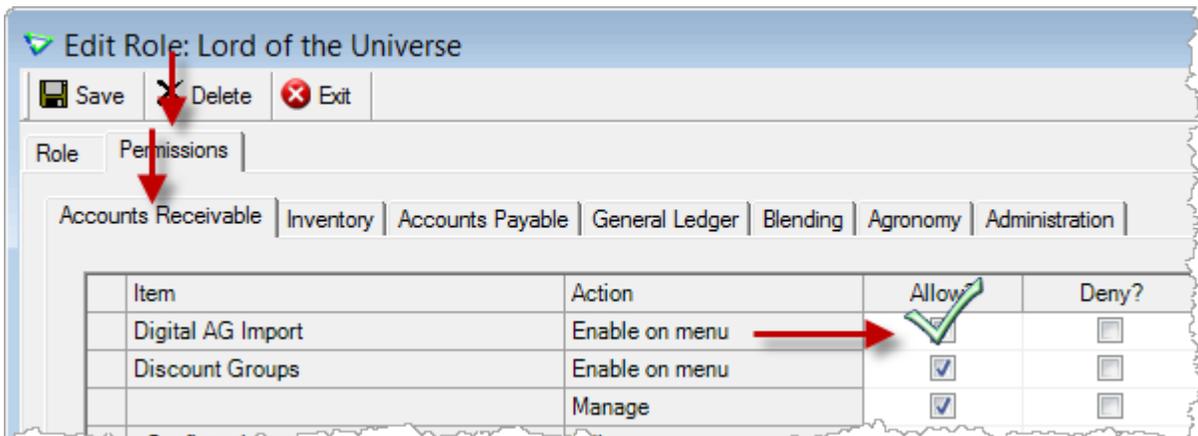
- Setup ..... 1
- Importing Booking and Crop Records ..... 2

## Setup

There's a one-time task that needs to be completed before you can start importing from Digital Ag.

## agrē Security

Users will need permission to import.



**File > Security > Manage Roles**

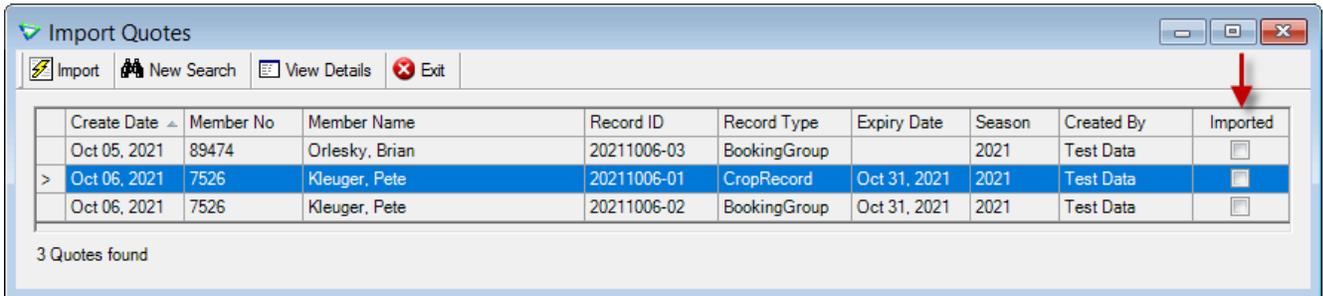
Not all users may need **Digital Ag Import** permission checked, but at least one user should be allowed to perform all tasks.

# Importing Digital Ag Booking and Crop Records

Importing from Digital Ag will create one Quote/Work Order per record.

Each Quote may contain one or multiple items.

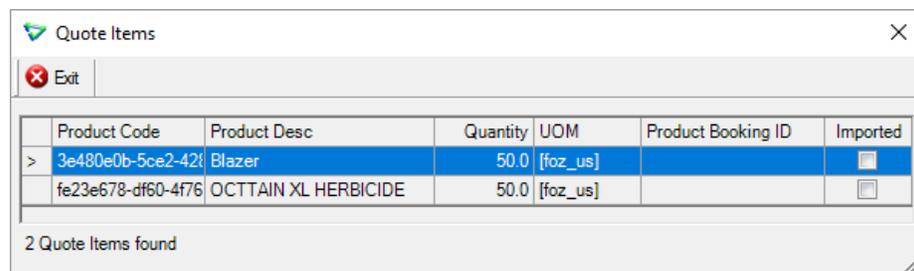
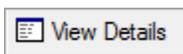
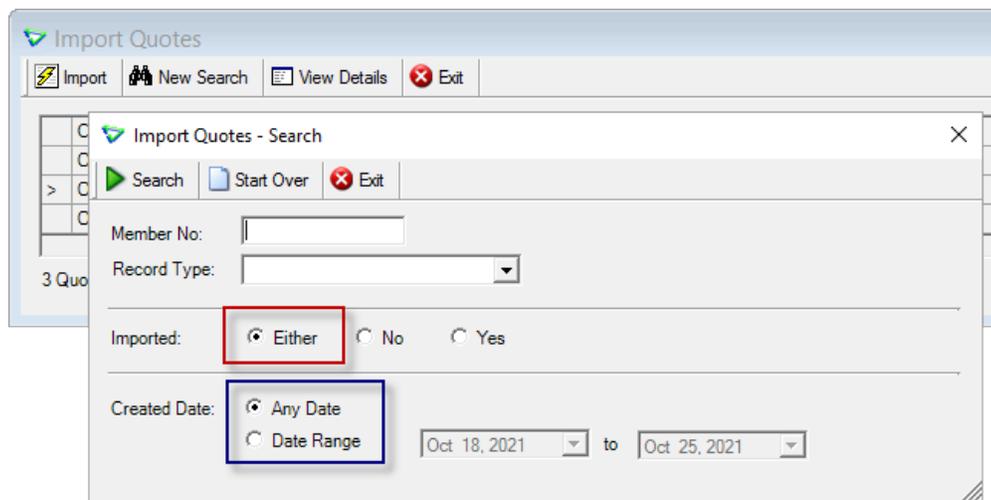
Digital Ag records are imported from the *Import Quotes* window.

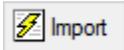


*Accounts Receivable > Import Digital Ag*

By default, all records that have not been imported are shown.

To view records that have already been **Imported**, change the search criteria.





Quote Import Items

Create Work Order Start Over Exit

Member: Kleuger, Pete (7526)  
Record Type: BookingGroup  
Created Date: Oct 06, 2021  
Location: St. Albert

Co-op AgZone FIELD				agre			
Product Code	Product Desc	Quantity	UOM	Product Code	Product Desc	Quantity	UOM
78088c1c-9666-48c	Potash 60	336,252.41	[lb_av]				

Map 1 Item found Select All Deselect All

Use the **Filter Products** criteria to find a matching item in agrē.

Quote - Map Item

Map Start Over Exit

Product Description: Potash 60  
Co-op AgZone FIELD Qty: 336,252.41 [lb\_av]  
Import Quantity: 336,252.41

enter quantity in units selected

Suggested Products: <No suggested products found>

Search Products:

Filter Products

Product Code: 10003 Manufacturer: <All Manufacturers>  
Product Desc: Manuf Prod Code:  
UPC:

find matching item in agrē Search Products

Prod Code	Description	Unit Type
10003	0-0-60	MT
10003	0-0-60	LB

select item and unit type

The mapped item is added to the grid.  
When all items to be imported are mapped, click *Create Work Order*.

The screenshot shows the 'Quote Import Items' window. At the top, there are buttons for 'Create Work Order' (highlighted with a red box and a yellow starburst), 'Start Over', and 'Exit'. Below these are input fields for 'Member' (Kleuger, Pete (7526)), 'Record Type' (BookingGroup), 'Created Date' (Oct 06, 2021), and 'Location'. A blue arrow points from a box labeled 'items from Agrian' to the 'Location' field. Another blue arrow points from a box labeled 'items added to agrē quote/work order' to the 'Create Work Order' button. Below the input fields is a table with two columns: 'Co-op AgZone FIELD' and 'agre'. The table has columns for 'Import', 'Product Code', 'Product Desc', 'Quantity', 'UOM', 'Product Code', 'Product Desc', 'Quantity', and 'UOM'. The first row is highlighted in blue and contains the following data:

Import	Product Code	Product Desc	Quantity	UOM	Product Code	Product Desc	Quantity	UOM
<input checked="" type="checkbox"/>	78088c1c-9666-48	Potash 60	336,252.41	[lb_av]	10003	0-0-60	336,252.41	LB

At the bottom left, there is a 'Map' button and the text '1 Item found'. At the bottom right, there are 'Select All' and 'Deselect All' buttons.