

# FCL LEASING AGENT PROCESS (AGRO EQUIPMENT LEASING)

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It is important to invoice the *Grower* and not the leasing company in order for the Grower to receive the patronage. The sales history of the equipment also needs to reside with your actual customer.

When a **Leasing Agent** is selected on an invoice, the invoice report will show the equipment as **Sold To the leasing agent** and Shipped To the customer.

For further information, please visit the following links:

**National Leasing:**

- Portal for staff: <https://portal.nationaleasing.com/login?locale=us>
- Base website <https://www.cwbnationaleasing.com/en>

**FCC:**

- <https://www.fcc-fac.ca/en.html>
- <https://www.fcc-fac.ca/en/we-finance/agriculture/lease-equipment.html>

**What you'll find:**

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# How do I process a payment for equipment I am leasing to a Grower?

## Adding a Leasing Agent to a Customer Invoice

To add a **Leasing Agent** customer invoice, start with a regular AR Invoice.

The screenshot shows the 'Add Invoice' window with the following details:

- Reference:** 1112 Baker, Mike (Callout 1)
- Customer:** 1112 Baker, Mike
- Invoice Date:** Jan 23, 2020
- Due Date:** Feb 22, 2020
- Location:** St. Albert
- Created By:** agre User
- Invoice Total:** \$5,000.00
- Customer and Shipping:** Billing Address: PO Box 15, Westlock, AB T0E 4L0; Ship to: Rural address, 7125 Twp Rd 64, Westlock, AB
- Leasing Agent:** National Leasing (Callout 2)
- Immediate Payment:**  Make a payment now; Pay This Amount: \$5,000.00
- Payment Type Table:** (Callout 3)

Payment Type	Amount	Total Amount	Amount Tendered	Change Due
> Leasing	\$5,000.00	\$5,000.00		

*Add Invoice*

- Step 1: select the Grower leasing the equipment
- Step 2: on the *Customer and Shipping* tab select the *Leasing Agent*
- Step 3: on the *Immediate Payment* tab, select **Leasing** as the *Payment Type* (if you have a multiple Leasing payment types available please confirm the correct tender type for this sale with your supervisor)
- Step 4: **Save** and print at least two (2) copies of the invoice
- Step 5: have the grower sign one (1) copy and send it to the Leasing Agent please see sample invoice on page 3



When the invoice is printed the **Leasing Agent** address will display as the Sold To address, and the grower's address will display as the Ship To address.  
 Send the signed copy to the Leasing Agent.



TSL Agro Co-op Ltd  
 335 Carleton Drive  
 St. Albert, AB T8N 7L1  
 Ph: 780.459.4477 Fax: 780.459.6405

Toll Free: 888.987.6642

## Invoice

Ref No: 100050  
 Date: Nov 19, 2018  
 Page: 1 of 1

**Sold To:**  
 National Leasing  
 1525 Buffalo Place  
 Winnipeg, MB R3T 1L9

**Ship To:**  
 Baker, Mike (11123)  
 PO Box 15  
 Westlock, AB T0E 4L0  
 (11123)  
 NW-2-51-1-W5

780.459.1202  
 Sales Rep: Bruce Clarkson  
 GST#: 102023923RT 021

agreU

Item #	Description	Ref No	Quantity	Unit	Taxes	Unit Price	Amount
3069416	2605000 COMPLETE IN BIN SUPER SWEEP		1	Each	N	\$5,000.00	\$5,000.00

<b>Total:</b>	<b>\$5,000.00</b>
Leasing	\$5,000.00
<b>Balance Owning:</b>	<b>\$0.00</b>

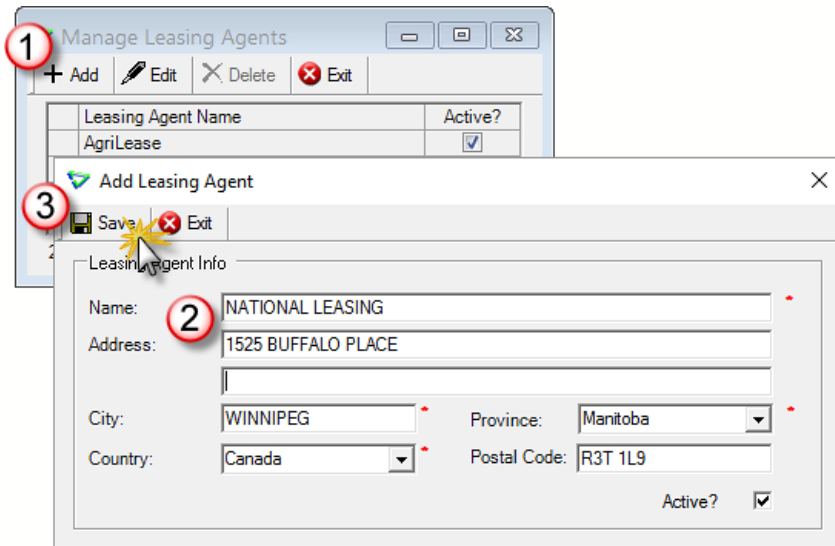
Signature: 

Date: \_\_\_\_\_

Created On: Nov 19, 2018 3:53 PM

# Managing Leasing Agents

A leasing agent will need to be added for all companies financing grower equipment. The sale needs to be recorded under the member's account (for patronage), but in real life the equipment will be owned by the Leasing Agent.



**Accounts Receivable > Manage > Leasing Agents**

- Step 1: navigate to **Accounts Receivable > Manage > Leasing Agents**
- Step 2: add each Leasing Agent as required
- Step 3: **Save** to save the agent

Because a Leasing Agent has been selected, when the invoice is printed agrē will automatically swap the names so that the equipment shows as sold to the Leasing Agent's address and shipped to the grower's address (refer to sample invoice on page 3). This swap happens *only* when a Leasing Agent is selected on an invoice.