



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.

What you'll find:

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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.



🏷 м	anage Price Levels		
📕 s	av Edit Name 😽 Prepaid Price Level	😢 Exit	
_	- V2		
	Description		
	Standard		
	Bronze		
	Gold		
>	Prepay		
1			1
The	e prepaid pricel level is Prepay		Remove Price Level

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.

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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*.

🔯 Manage Product Retail Prices				_ • •
Save Start Over 😵 Exit				
Location:	Show Company Prices	2 Retrieve Prices	*	
Product Company>	Units	Price Level	Retail Price	Last Changed
Edmonton Grande Prairie Kelowna St. Albert				

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.

3	Save Start Over 😵 Exit					
oc	ation: <company></company>	Show Company Prices	Retrieve Prices			
_	Product	Units	Price Level	Retail Price	Last Changed	d
,	00095 - 0-0-0-95 Bulk	metric tonne	Bronze			
			Gold			
			Prepay	\$888.88	Dec 06, 2010	
			Standard	\$1,095.00	Nov 12, 2009	
	0060 - 0-0-60 Bulk	metric tonne	Bronze			
			Gold			
			Prepay	\$800.88	Dec 06, 2010	
			Standard	\$970.00	Nov 12, 2009	
	1152 - 11-52 Bulk	metric tonne	Bronze			
			Gold			
			Prepay	\$750.88	Dec 06, 2010	
			Standard	\$1,555.00	Nov 12, 2009	

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*.

😺 Product Price L	ist 💽
🕨 Ra <mark>y </mark> 🐼 Exit	
Select Abducts	Include Sale Prices?
<single product:="" s<="" td=""><td>itart Typing or use Find> Find</td></single>	itart Typing or use Find> Find
Product Type:	Dry Fertilizer
Characteristics:	▼
Supplier:	_
Manufacturer:	▼
	More Options
Location:	<company></company>
	Edmonton
	Grande Prairie
	Kelowna
	St. Albert
Price Level:	Prepay 🔽
Sort By:	Product Description

Inventory > Reports

Use the results to check your prices.

			Product Price List
	For <company> a</company>	and Product Type is Dr	ry Fertilizer an <mark>d Price Level is Prepay</mark>
Product	Price Level	Location	Current Price Units
0-0-0-95 Bulk (00095)	Prepay	<company></company>	\$888.88 metric tonne
0-0-60 Bulk (0060)	Prepay	<company></company>	\$800.88 metric tonne
11-52 Bulk (1152)	Prepay	<company></company>	\$750.88 metric tonne
12-0-0-50 Sulphate (120050)	Prepay	<company></company>	\$950.00 metric tonne
20-0-0-24 Bulk (200024)	Prepay	<company></company>	\$570.88 metric tonne
46-0-0 Bulk (46)	Prepay	<company></company>	\$950.88 metric tonne
and a state of the second	and a second	the second se	ويحافى ويلتحكم والمعسيدة المحافظ فالمحاوين والا

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 <u>both</u>** the *Prepay* and the *Use Current Price on Invoice* checkboxes.

🕽 Update 🛛 🕼] Refresh	😢 Exit						
Product:	46 - 46-0-	0 Bulk		U I	ise Pre	the Curre paid Prie	ent ce	Add
Units:	MT - metr	ic tonne						
Location:	Edmontor	ı		-	-			
Unit Price:					N	Prepay? Use Currer	Pricing It Price on In	voice?
Quantity on Ha	ind:		2,684.1900				Inventor	y Details
Quantity Requ	ested:		25.0000	•	☑	Committed?		
Quantity Limit	at this Pric	e:	25.0000					
Line Comment	s:							

Accounts Receivable > Work Orders

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

Add Work Orde	er									,
📕 Save 🛛 🕄 Ref	fresh 🔇 Exit									
Reference: Customer: Date Ordered:	Slone, Leslie (5004)	Generate	e Reference Au	tomatically	nd Add	⊂Work Order 1 C Quote	ype (Order			
Expiry Date: Location:	Jun 30, 2011	No Expiry Da	ate]• Servi	ce Date:		ব	No Authorization No Service Date			
Created By: Status:	Active	v	Comr	ments:						
Product		Quantity	Unit Price	Committed	Taken	Limit	Location	Status	Release	Prepay?
46 - 46-0-0 E	Bulk (MT)	10.0000		V	0.0000	10.0000	Edmonton	Active		
1152 - 11-52	2 Bulk (MT)	5.0000		V	0.0000	5.0000	Edmonton	Active		
> 0060 - 0-0-6	0 Bulk (MT)	2.0000		V	0.0000	2.0000	Edmonton	Active		V
	no pric so will	e specified use current price					also fl prepa use prepa	agged as iid so wil curent aid price	s	
Add Product	Add Itemized Blends	Add Blend	Edit	Row	Remove Row	Release N	umbers	Total: (before	e tax)	\$0.00

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

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			Dpening balanc Net deposits Net withdraw let prepaymen	e as of and tra als t as of	Dec 15 ansfers Jan 24,	, 2010 2011	\$4 	7,100.00 \$0.00 \$0.00
			Less: Remair	ning on	work or	ders		\$0.00
		_	Less: Pendin	ig witho	drawals			\$0.00
		L	Jnallocated / ((Over C	o <mark>mmitt</mark> e	d)	\$4	17,100.00
Prepayment Plan								
Product	Date	Reference	e Requested	Limit	Taken	Remaining	Unit Price	Allocated
0-0-60 Bulk - metric tonne	Dec 15, 2010	WOE012	2	2	0	2	\$0.00	\$0.00
11-52 Bulk - metric tonne	Dec 15, 2010	WOE012	5	5	0	5	\$0.00	\$0.00
46-0-0 Bulk - metric tonne	Dec 15, 2010	WOE012	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) ...

and ⁴	Setup Calculation Additional Pro	ducts Blend N	ntes Price Sh	eet Batch	Sheet			
Rie	and Name: 32.9-10.9-6.9-0.2				Bland De	ecciption:		
Nut	trient Requirements:					Field Size (a	Fi	ields 218.2
	No. 1 .					Field Size (a		
	Nutrient	Ib per acre				Broadcast R	ate (Ib per acre):	J 10
P-	N - Nitrogen	33.2				Blend Quant	ity (MT):	10.00
\vdash	K - Potash	7.0						
	S - Sulphur	0.3						
	prices bet	fore linking					Density:	52.9
Pro	prices bet to a wo (current re	fore linking rk order etail prices)	Prepa	w Blend 🔽			Density: Blend Total Price:	\$1,095.430
Pro	prices bet to a wo (current re	fore linking rk order stail prices)	Prepa	y Blend	WO Ref	Prenav2	Density: Blend Total Price:	\$1,095.430
Pro	prices bet to a wo (current re ducts in Blend: Product 46 - 46-0-0 Bulk	fore linking rk order etail prices) Quantity 6.61	Prepa	Price	WO Ref	Prepay?	Density: Blend Total Price: Subtotal:	\$1.095.4300 \$10.954.3
Pro	prices bet to a wo (current re ducts in Blend: Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk	fore linking rk order etail prices) Quantity 6.61 2.11	Prepa	y Blend Price 980.00 1,555.00	WO Ref	Prepay? No No	Density: Blend Total Price: Subtotal: Add'l Prod. Total:	52.5 \$1,095.4300 \$10,954.3 \$0.00
Pro	prices bet to a wo (current re ducts in Blend: Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk 0060 - 0-0-60 Bulk	fore linking rk order etail prices) Quantity 6.61 2.11 1.16	Prepa	y Blend Price 980.00 1,555.00 970.00	WO Ref	Prepay? No No No	Density: Blend Total Price: Subtotal: Add'l Prod. Total: Add'l Prod Taxes:	52.5 \$1,095.4300 \$10,954.3 \$0.00 \$0.00
Pro	Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk 0060 - 0-0-60 Bulk 200024 - 20-0-0-24 Bulk	fore linking rk order etail prices) Quantity 6.61 2.11 1.16 0.12	Prepa Prepa 21.113 11.644 1.248	y Blend Price 980.00 1,555.00 970.00 595.00	WO Ref	Prepay? No No No No	Density: Blend Total Price: Subtotal: Add'l Prod. Total: Add'l Prod Taxes: Total:	52.5 \$1,095.430 \$10,954.3 \$0.00 \$0.00 \$10,954.3

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.

	e Start Over	Edit Charges	😢 Exit				
nd	Setup Calculation Additional Prod	lucts Blend Not	es Price She	et Batch Sheet			
Ble	nd Name: 32.9-10.9-6.9-0.2			Blend i	Description:		
Nut	, trient Requirements:				Field Size (ac	re): Fie	elds 218.28
	Nutrient	Ib per acre			Broadcast Rat	e (lb per acre):	101
>	N - Nitrogen	33.2			Dioducast Hat	e (ib per dere).	10.00
	P - Phosphorus	11.0			Blend Quantity	r (MT):	j 10.00
	K - Potash	7.0					
	S - Sulphur	0.3					
	prices AFTE (current prepa	R linking aid prices)				Density:	52.9
	oducts in Blend:		Prepay	Blend		Blend Total Price:	\$886.7466
Pro		Quantity	Percent	Price WO Re	of Prepay?	Subtotal:	\$8,867.47
Pro	Product	quantity			2 Yee		\$0.00
Pro	Product 46 - 46-0-0 Bulk	6.61	65.995	950.88 WOE01	2 165	Add'l Prod. Total:	
Pro	Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk	6.61 2.11	65.995 21.113	950.88 WOE012 750.88 WOE012	2 Yes	Add'l Prod. Total:	0.00
Pro	Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk 0060 - 0-0-60 Bulk	6.61 2.11 1.16	65.995 21.113 11.644	950.88 WOE01: 750.88 WOE01: 800.88 WOE01:	2 Yes 2 Yes	Add'l Prod. Total: Add'l Prod Taxes:	\$0.00
>	Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk 0060 - 0-0-60 Bulk 200024 - 20-0-0-24 Bulk	6.61 2.11 1.16 0.12	65.995 21.113 11.644 1.248	950.88 WOE01 750.88 WOE01 800.88 WOE01 595.00	2 Yes 2 Yes No	Add'l Prod. Total: Add'l Prod Taxes: Total:	\$0.00
>	Product 46 - 46-0-0 Bulk 1152 - 11-52 Bulk 0060 - 0-0-60 Bulk 200024 - 20-0-0-24 Bulk	6.61 2.11 1.16 0.12	65.995 21.113 11.644 1.248	950.88 WOE01 750.88 WOE01 800.88 WOE01 595.00	2 Yes 2 Yes No	Add'l Prod. Total: Add'l Prod Taxes: Total: Price per acre:	\$0.00 \$0.00 \$8,867.47 \$40.62

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.

1	For Carter, Alexan	der (E005) (Invoice))							
Save 📄 Start	t Over 🚯 Refres	h IIII Edit Charges	s 🔞 Exit							
nd Setup Calc	ulation Additional	Products Blend No	tes Price S	heet Batch	Sheet					
Blend Name:	33.9-8.2-0.0-6.1				Blend D	escription:				
Nutrient Require	ements:			_	_	Field Size			Fields	737.65
Nutrient Hear and		Pield Size (acre): Pields 757.65								
N - Nitrogen		10 per acre	Broadcast Rate (Ib per acre):							38
P - Phosphorus		80	Blend Quantity (MT): 32.7							
K - Potash		0.0								
> S - Sulphur	r	6.0								
							C	ensity:		52.4
		E	Before Pr	repay Bl	end				_	
Products in Bler	nd:	E	Before Pr	repayBl ayBlend ⊏	end		E	Bend Total Pric	e: 🗌	\$971.9952
Products in Bler	nd:	E MT	Before Prepa	ay Blend Price	end WO Ref	Prepay?	E	Blend Total Pric	e:	\$971.9952 \$31,871.72
Products in Bler Product > 46 - 46-0-0	nd:) Bulk	MT 19.19	Prepa Percent 58.496	ay Blend Price 980.00	wo Ref	Prepay? No	E S	Blend Total Price Subtotal: Add'l Prod. Total	e:	\$971.9952 \$31,871.72 \$0.00
Products in Bler Product > 46 - 46-0-0 1152 - 11-5 200024 - 20	nd:) Bulk 52 Bulk 0-0-0-24 Bulk	MT 19.19 5.18 8.42	Prepa Percent \$8,496 5,811 25,693	repay Bl ay Blend Price 980.00 1.555.00 595.00	WO Ref	Prepay? No No	E S A	Blend Total Pric Subtotal: Add'I Prod. Total	e:	\$971.9952 \$31.871.72 \$0.00 \$0.00
Products in Bler Product > 46 - 46-0-0 1152 - 11-5 200024 - 20	nd:) Bulk 52 Bulk 0-0-0-24 Bulk	MT 19.19 5.18 8.42	Percent 5.811 5.693	repay Bl ay Blend Price 980.00 1,555.00 595.00	WO Ref	Prepay? No No No	E S A A	Slend Total Pric Subtotal: Add'I Prod. Total Add'I Prod Taxe: Total:	e:	\$971.9952 \$31,871.72 \$0.00 \$0.00 \$31,871.72
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Products in Bler Product > 46 - 46-0-0 1152 - 11-5 200024 - 20	nd: Bulk 52 Bulk 0-0-0-24 Bulk	MT 19.19 5.18 8.42	Before Pr Percent \$8.496 5.811 5.693	Price 980.00 1.555.00 595.00	end WO Ref	Prepay? No No No	E S A A T F	Blend Total Pric Subtotal: Add'I Prod. Total Add'I Prod Taxe: fotal: Price per acre:	e:	\$971.9952 \$31,871.72 \$0.00 \$0.00 \$31,871.72 \$43.21 calculate Blend
Products in Bler Product > 46 - 46-0-0 1152 - 11-5 200024 - 20	nd:) Bulk 52 Bulk 0-0-0-24 Bulk	MT 19.19 5.18 8.42	Percent 98:496 5:811 55:693	Price 980.00 1.555.00 595.00	end WO Ref er Prep	Prepay? No No No ay Blen	E S A A T F	Blend Total Price Subtotal: Add'I Prod. Total Add'I Prod Taxes Total: Price per acre:	e:	\$971.9952 \$31.871.72 \$0.00 \$0.00 \$31.871.72 \$43.21 calculate Blend
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Products in Bles Product > 46 - 46-0-0 1152 - 11-5 200024 - 20	nd: Dulk 52 Bulk 0-0-0-24 Bulk Products in B Product in B	MT 19.19 5.18 8.42	Before Pr Percent 58,496 5,811 25,693	Aft	end WO Ref er Prepay Prepay E	Prepay? No No No ay Blen	d WD Ref	Blend Total Price Subtotal: Add'I Prod. Total Add'I Prod Taxes fotal: Price per acre: Price per acre:	e:	\$971.9952 \$31.871.72 \$0.00 \$31.871.72 \$43.21 calculate Blend
Products in Blex Product > 46 - 46-0-0 1152 - 11-5 200024 - 21	nd: DBulk 52 Bulk 0-0-0-24 Bulk Products in B Products > 46 - 45-0	MT 19.19 5.18 8.42 3lend:	Before Pr Percent 58,496 5,811 25,693	Aft MT F 1919 MT F 1919 595 MT F 1919 595 595 595 6 6 6 6 7 7 7 7 7 7	end WO Ref er Prepay E Prepay E 8.496	Prepay? No No No ay Blen Price 950.88	d WD Ref	Blend Total Price Subtotal: Add'I Prod. Total Add'I Prod Taxes fotal: Price per acre: Prepay? Yes	e:	\$971.9952 \$31.871.72 \$0.00 \$31.871.72 \$43.21 \$43.21 calculate Blend
Products in Bler Product > 46 - 46-0-0 1152 - 11-5 200024 - 21	nd: 2 Bulk 52 Bulk 0-0-0-24 Bulk Products in B Products > 46 - 46-0 1152 - 1 120 - 1	MT 19.19 5.18 8.42 Blend: 	Before Pr Percent 58,496 5,811 25,693	Aft MT F 19.19 MT F 19.19 5.12 4.2	end WO Ref er Prepay E Prepay E Prepay E 88.496 158.496	Prepay? No No No ay Blen Price 950.88 750.88	d WO Ref	Blend Total Price Subtotal: Add'I Prod. Total Add'I Prod Taxes fotal: Price per acre: Price per acre: Prepay? Yes Yes	e:	\$971.9952 \$31.871.72 \$0.00 \$0.00 \$31.871.72 \$43.21 calculate Blend

Accounts Receivable > Invoices > Add Blend Row

Straight Product with No Work Order

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

	- Neilesni 🛛 🐼 Exit					
Product:	ACHIEVE - Achieve Lic	uid Gold		-	Find	Add
Units:	CSE - case		-			
Location:	St. Albert		_			
Quantity on Har	nd:	-5.0000	C BEF	unit price FORE pr	e epay	ventory
Quantity:		3.0000 *	_			
Unit Price:		\$554.00	Pricing	🗌 Prepay	?	1
Line Total:	\$1	1,662.00		-		
Line Comments	:		\backslash		ur	nit price
Project:	Quantity:			3.0000 •	AFTI	ER prepay
	Unit Price:			\$495.00 *	Pricin	g 🔽 Prepa
	Line Total:		ş	1,485.00		

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)