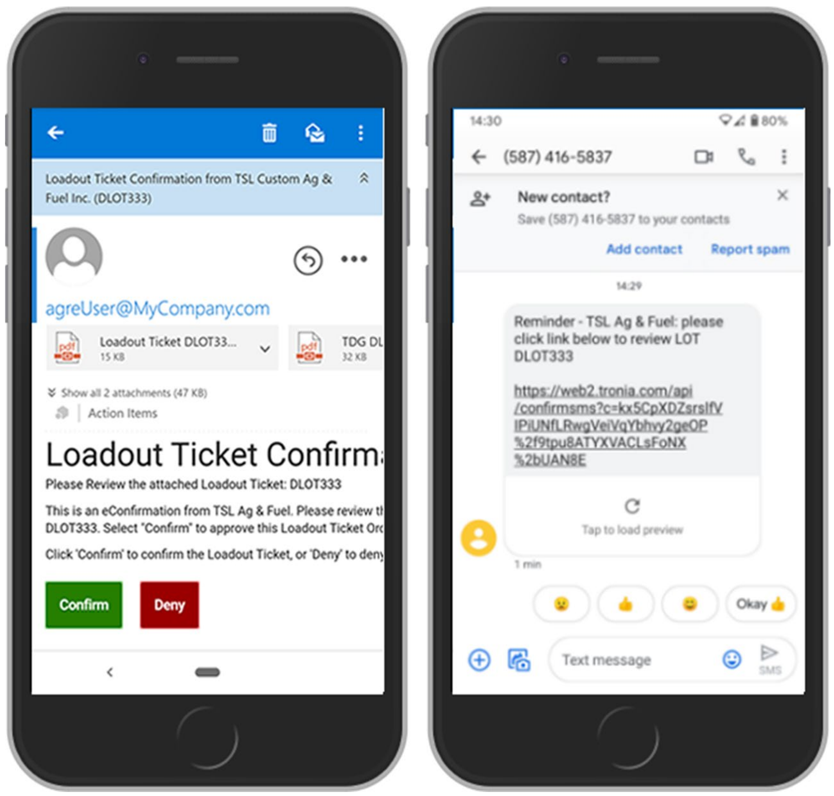
ECONFIRMATIONS



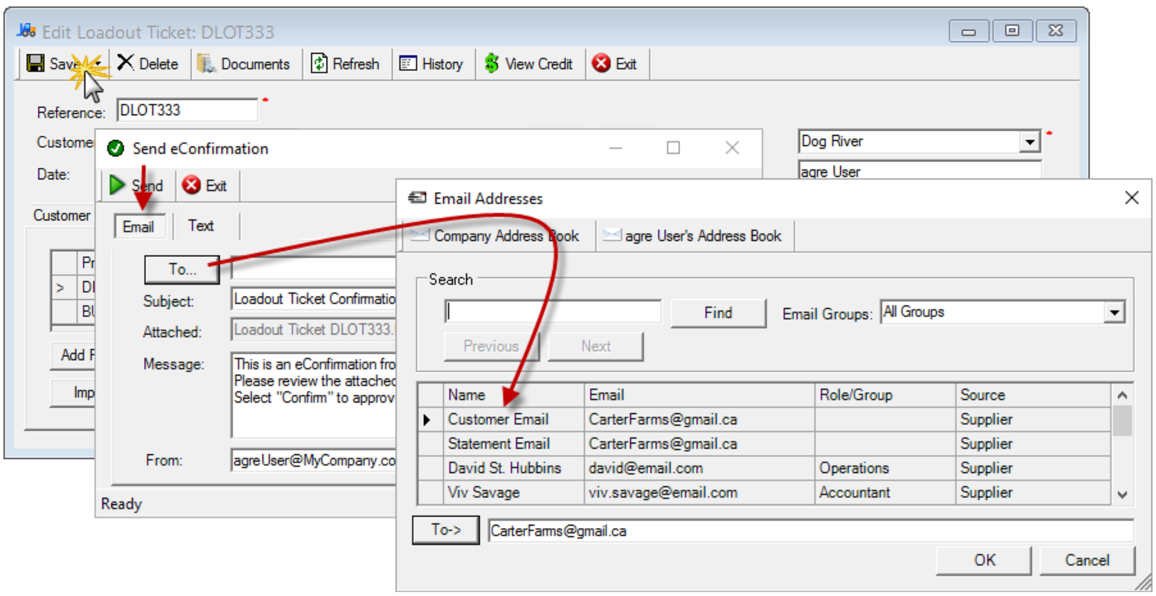
The eConfirmation (electronic confirmation) process allows you to send an electronic communication (email or text) to a customer with details regarding a specific Work Order, Loadout Ticket, or Invoice. The customer reviews the transaction details, then chooses to **Confirm** or **Deny** the activity via a link embedded in the email or text. Depending on the option selected, a response is returned to agrē and the confirmation status, who confirmed, date, time, etc. is documented.

What you'll find:

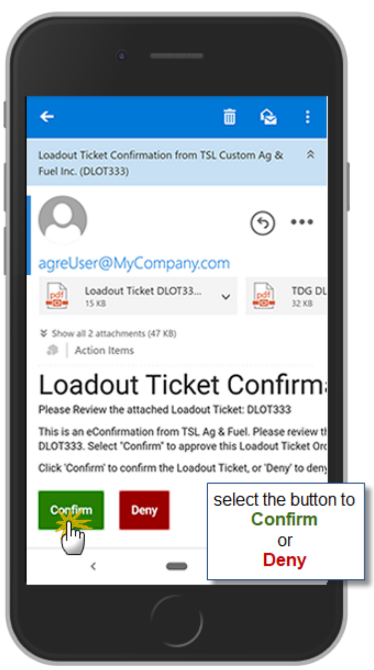
eConfirmation Overview

This is an overview of the eConfirmation process for a Loadout Ticket. The process works the same for Work Orders and Invoices.

A customer arrives to pick up some of their preordered crop protection products. The items have been pulled from the shed and are waiting to be loaded in view of the customer so they can confirm what they are receiving. The shipper loads the product, saves the Loadout Ticket, and is prompted to send an eConfirmation - with TDG attached - to the customer via email or text (easily select from email addresses and phone numbers stored on the customer's account, or enter one on the fly).



save Loadout Ticket to initiate eConfirmation



sample confirmation email

The customer approves the loadout ticket from their cell phone (internet connectivity required) and leaves the yard with their product.

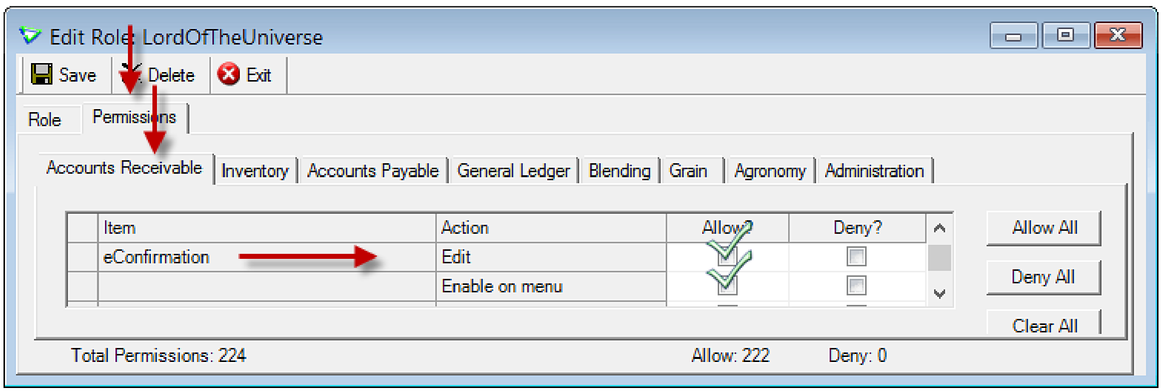
eConfirmation Setup (one-time tasks)

Before agrē can start sending eConfirmations, a few things need setup.

Security Permissions

This symbol 🔒 indicates a security permission update is required to allow access.

No additional security permission is required to *send* eConfirmations, but users will require permission to *manage* them (view, change status, send reminders, etc.)



File > Security > Manage Roles

Configuration Options

There are eConfirmation configuration options that can be set at the Company, Location, and User level to customize the workflow for your business.

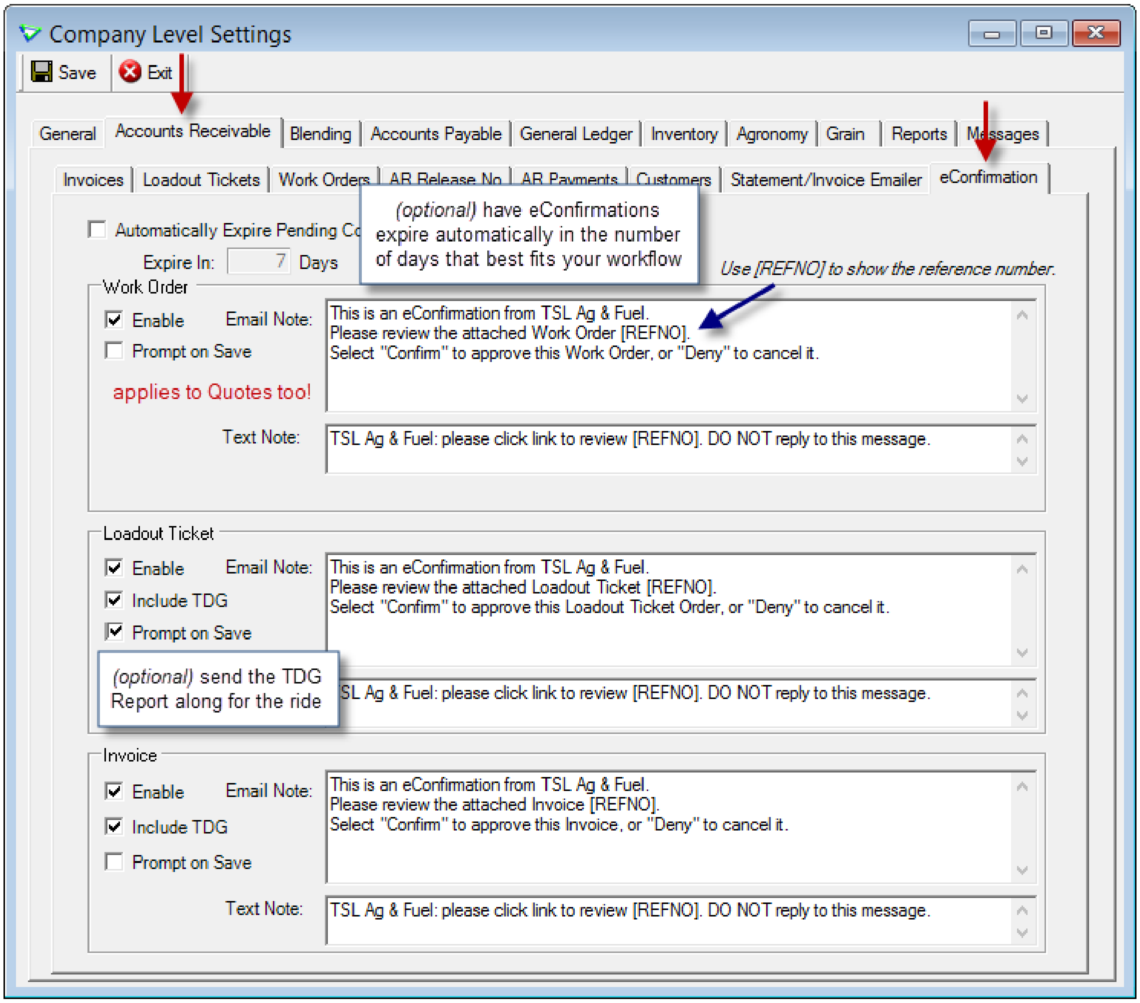
Company Configuration Options

eConfirmations can be sent for the following Accounts Receivable transactions:

- Work Order
- Loadout Ticket (TDG optional)
- AR Invoice (TDG optional)

eConfirmations are independent of each other - ***Enable*** and ***Prompt on Save*** only for the transactions you want.

The examples below may give you some ideas:



File > Config Options > Company

Automatically Expire Pending Confirmations Optionally expire pending confirmations automatically after a certain number of days. (e.g. Work Order/Quote pricing must be confirmed within 3 days) eConfirmations that are ***Expired*** (or ***Cancelled)*** **cannot be confirmed or denied**.

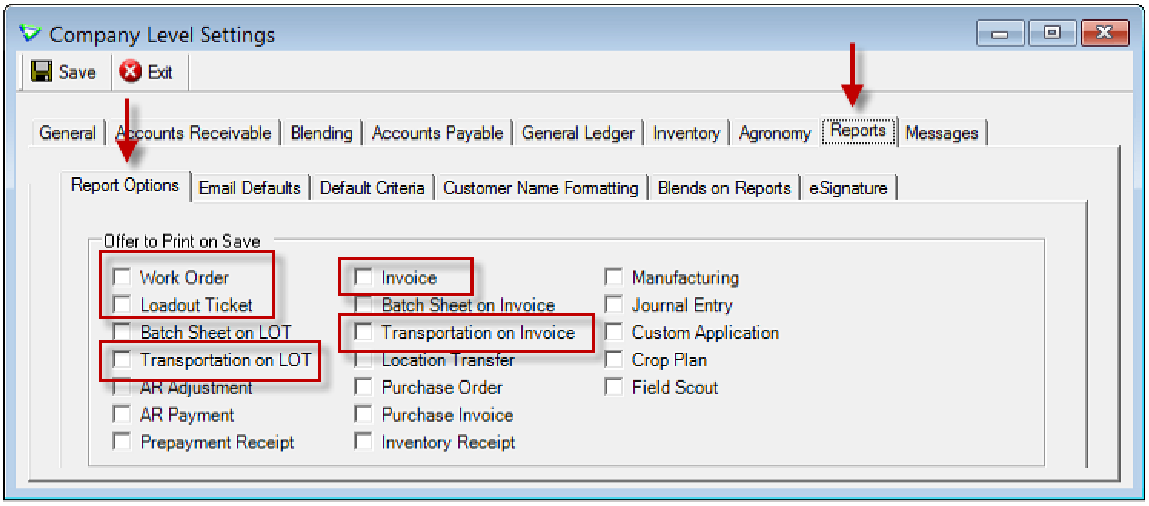
Include TDG A TDG Report will be included with each eConfirmation except when the transaction involves:

- only Non-Inventory Items
- only Returns (unless your database is configured to generate a TDG for Returns)

Text Note **Start with your company name**. Your customers won't recognize the phone number and you want them to know it's from a safe sender. If Text Notes are inactive, your company has chosen to send by email only.

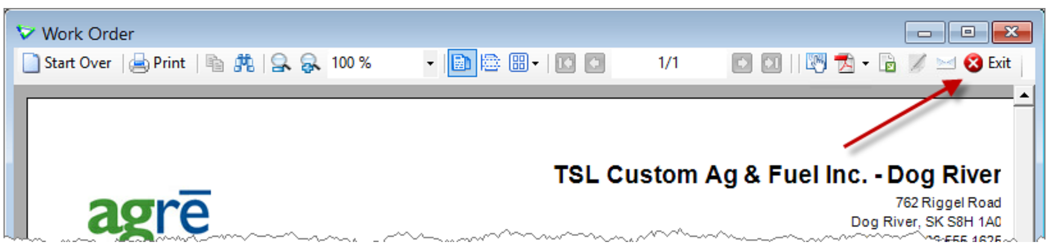
A link to view the transaction report will be appended after the Email or Text Note you enter.

If you will no longer be *printing* transaction reports in addition to sending them electronically, you may want agrē to stop prompting you. Optionally clear the ***Offer to Print on Save*** checkboxes for **Work Orders**, **Loadout Tickets**, and **Invoices**.

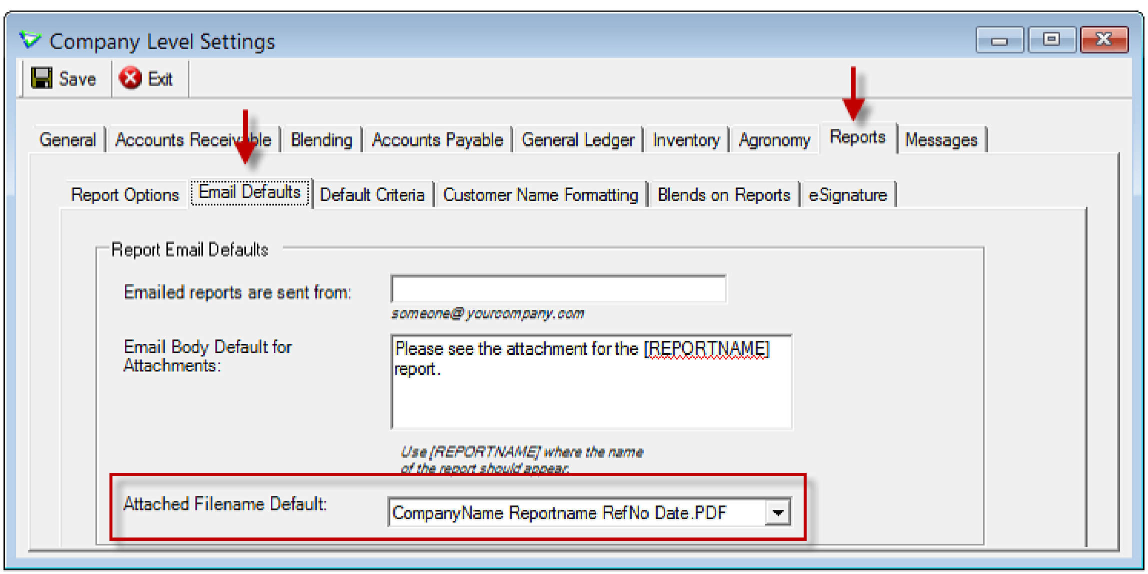


File > Config Options > Company

Turning off the printing prompts will also turn off the report previews, so leave them checked if you prefer to see what you're sending before it goes out - after you preview the report click ***Exit***, then you'll be prompted to send the eConfirmation.



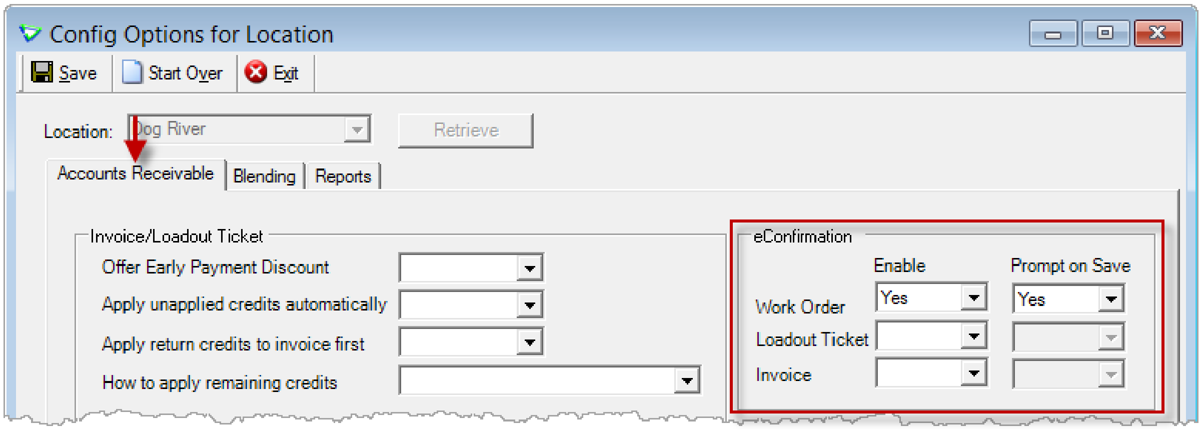
(optional) Choose a different file name format for the electronic version of the transaction report.



File > Config Options > Company

Location Configuration Options

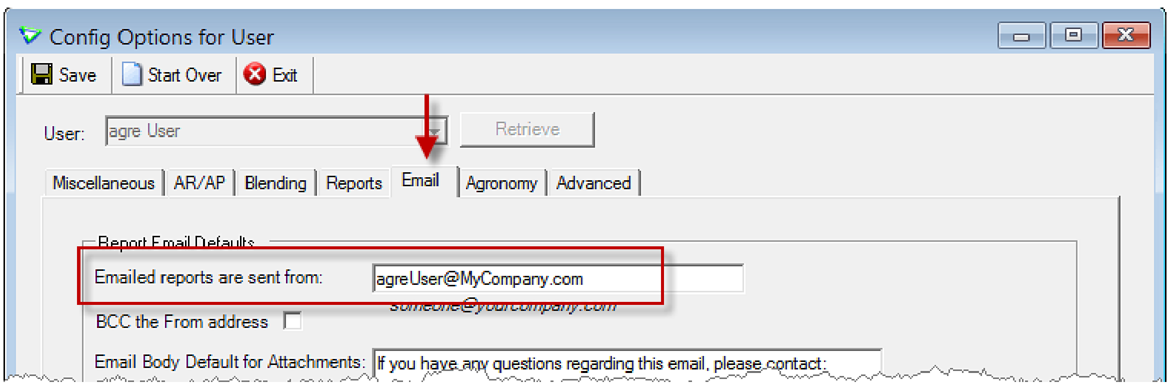
The Company eConfirmation settings can be **overridden** at the Location level.



File > Config Options > Location

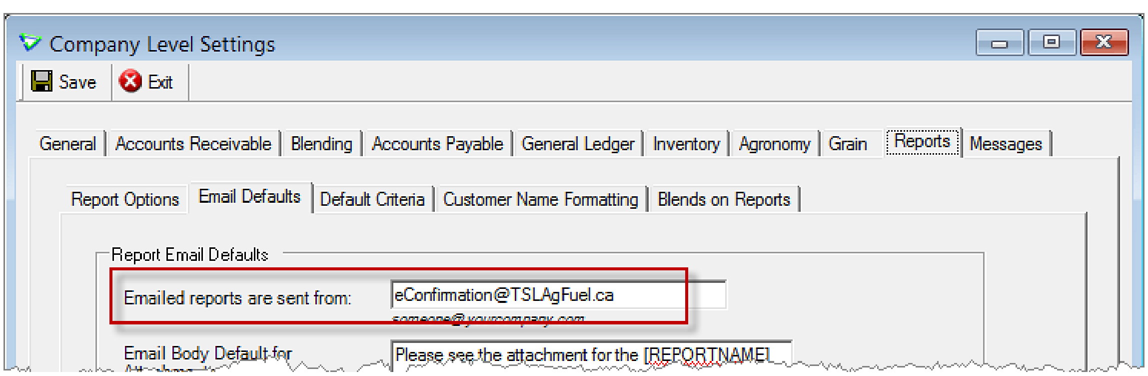
User Configuration Options

agrē needs a return address to use when it sends emails.



File > Config Options > User

A return email address could also be set at the Company level if you want all eConfirmation emails sent from a single address (a user address will override the company one).



File > Config Options > Company

Sending eConfirmations

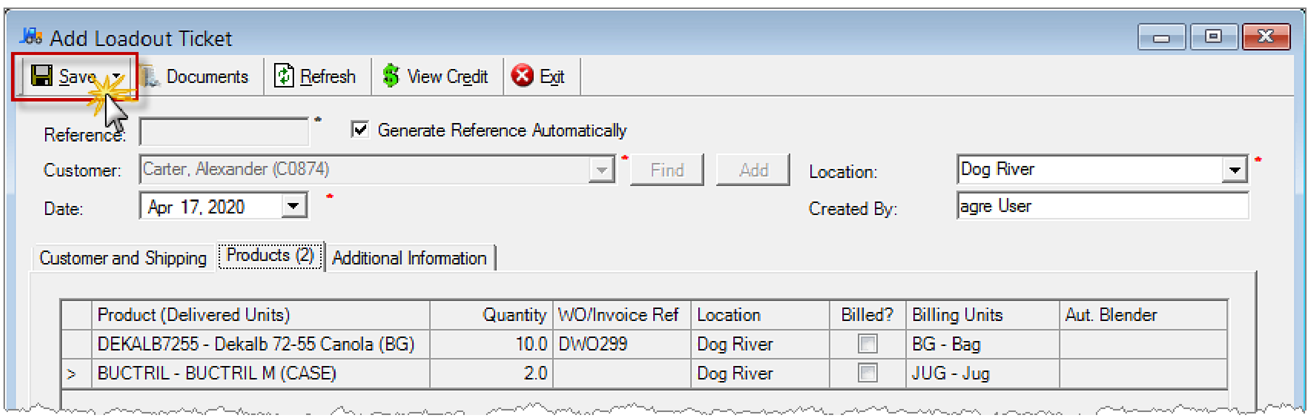
eConfirmations can be sent on the fly in real time as the transaction happens, or manually after the fact.

Sending an ***eConfirmation*** creates a new row in the eConfirmation home form with a ***Status*** of **Pending** (so if you send more than one, there will be more than one row in the grid).

Add and save a Work Order, Loadout Ticket, or Invoice like you normally would.

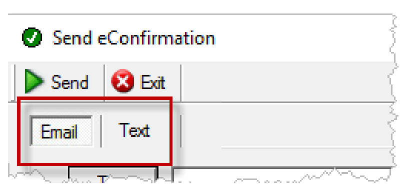
On the Fly with Prompt on Save

Every time you ***Save*** …



Accounts Receivable > Loadout Tickets

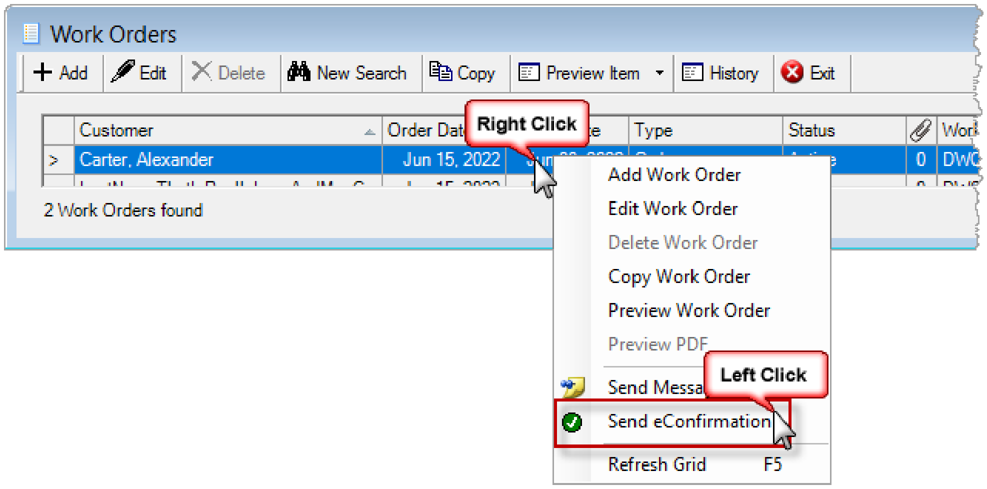
… you'll be prompted automatically to ***Send an eConfirmation*** to the customer by either **Email** or **Text** (but not both at the same time).



agrē will remember the eConfirmation ***Type*** for this customer to use for next time.

Manually (Prompt on Save not checked)

Right-click on the transaction and select ***Send eConfirmation***.



Accounts Receivable > Loadout Tickets

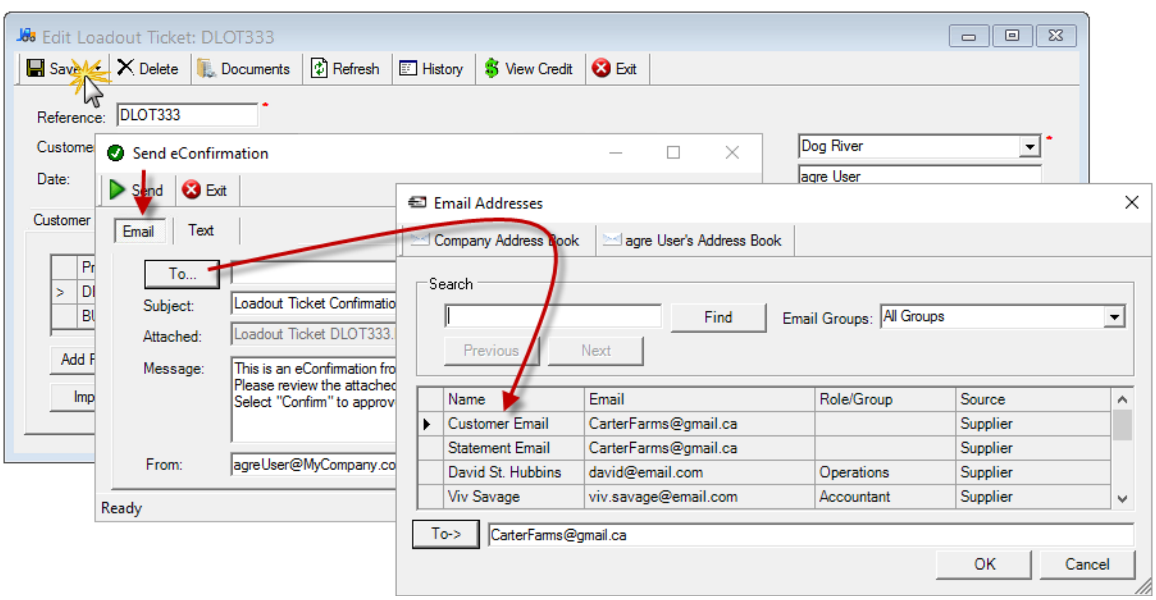
Text or Email?

Sending eConfirmation by Email

On first use the ***Email*** tab is selected by default. When you click ***Send***, you will be sending an email.

The **subject** line defaults to: [Transaction] Confirmation for [Reference Number].
e.g. Loadout Ticket Confirmation for DLOT333

The last address used to email an eConfirmation to this customer is displayed by default in the **To** field, but it can be changed. Manually type a different address, or click **[To …]** to open agrē's ***Address Book*** and select a different address from the customer's account.

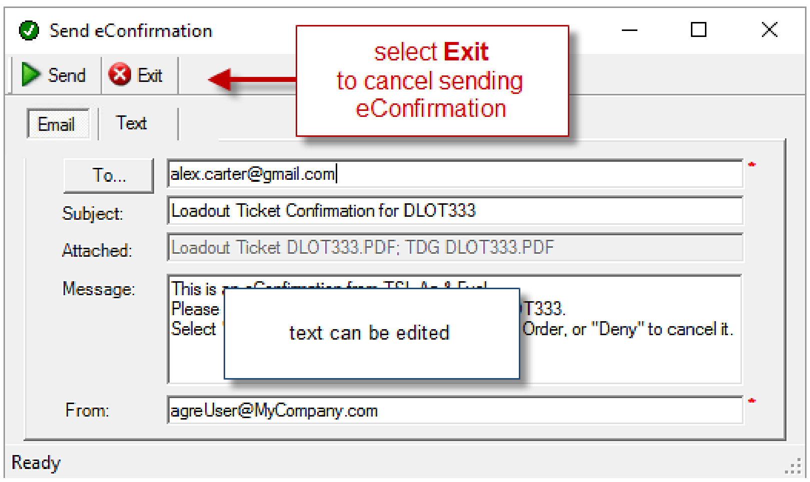


only contacts with an email address are listed

Tip	You would normally **send the eConfirmation to ONE email address only** - sending to multiple addresses would allow *any* of the recipients to Confirm or Deny the transaction.

If the transaction (Loadout Ticket and AR Invoice only) is configured to include the **TDG report**, it will be attached to the email automatically.

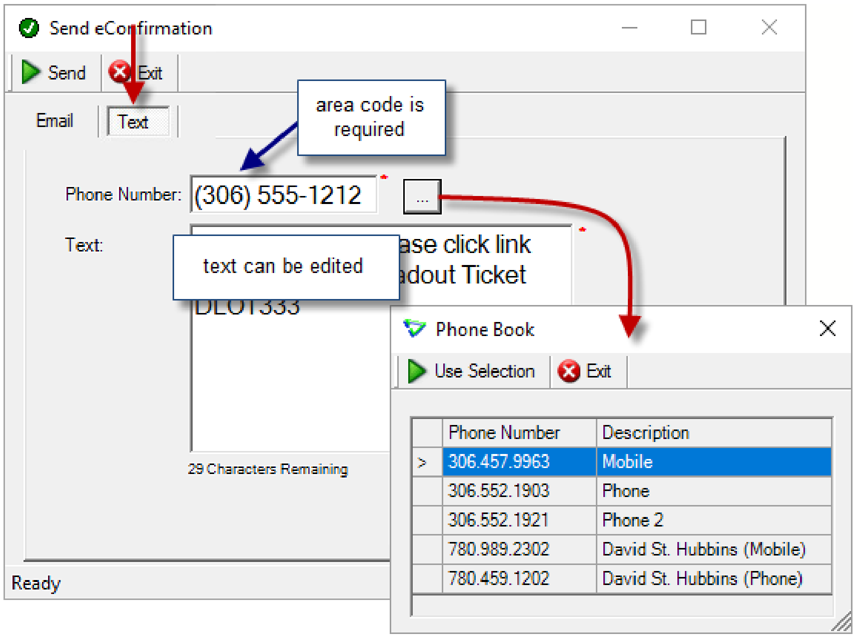
If you don't want to send an eConfirmation at this time, just click ***Exit***.
Every time you save, you'll get another offer to send one.



Sending eConfirmation by Text

Select the ***Text*** tab. When you click ***Send***, you will be sending a text message.

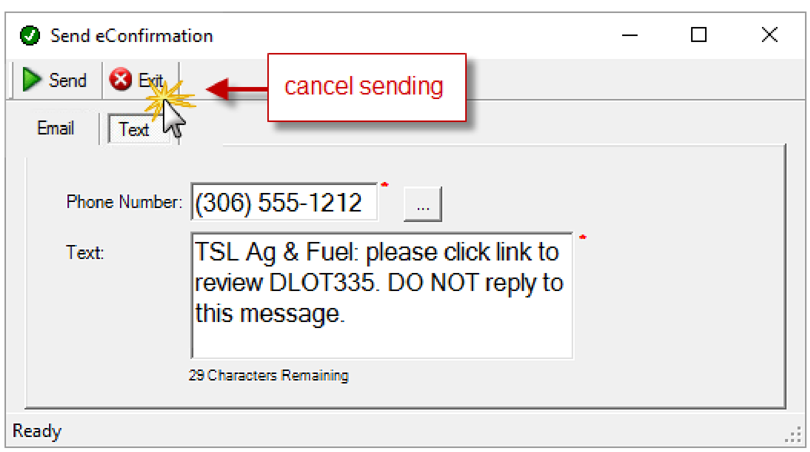
The last phone number used to text an eConfirmation to this customer is displayed by default in the **Phone Number** field, but it can be changed. Manually type a different phone number, or click the ellipsis button **[…]** to open agrē's ***Phone Book*** and select a different number from the customer's account.



sending by text requires a 10 digit phone number
only contacts with a phone number are listed

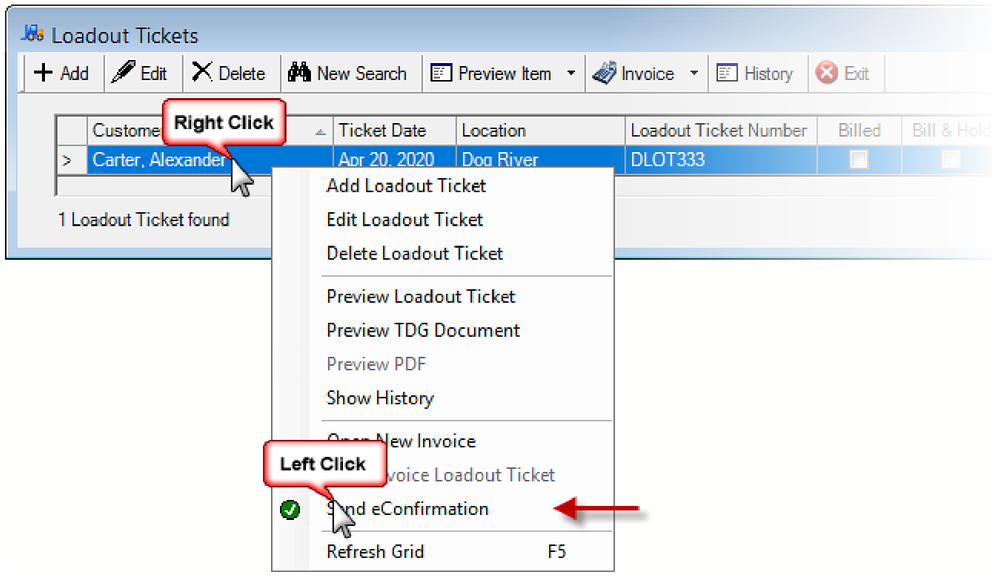
A link to view the ***eConfirmation*** will be appended to the text message as it is sent.

You'll be prompted to send an eConfirmation each time you save.
If you don't want to send one at this time, just click ***Exit***.



From the Home Form

Normally an eConfirmation is sent at the time the transaction is saved, but you can send one at any time from the respective home form (Work Order, Loadout Ticket, AR Invoice).



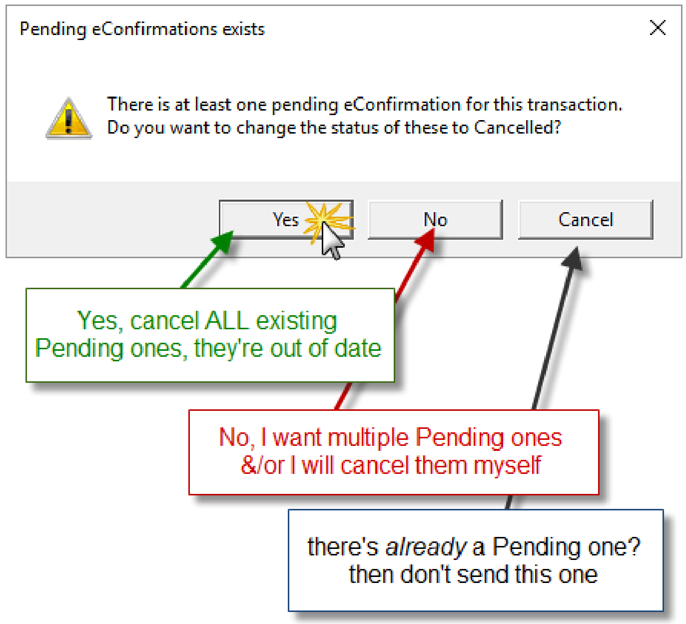
***Account Receivable > Loadout Tickets** (or **Work Orders** or **Invoices**)*

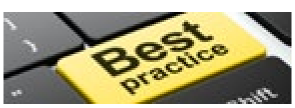
This will send a new eConfirmation. Even if an eConfirmation was already sent previously, a new pending one will be generated and sent.

Sent eConfirmations

All eConfirmations are sent with a ***Status*** of **Pending**.

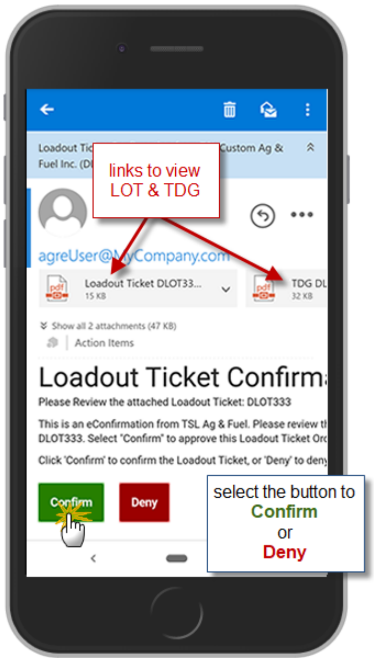
If there is **already** a **pending** eConfirmation (or more than one) and you send another, agrē will prompt you to **cancel** the **existing** pending one(s) so there is no confusion on the customer's part as to which iteration they should Confirm or Deny - it should always be the most recent one.





It's best to have just **one Pending eConfirmation for each transaction**, or your grower may be confirming/denying one that is out of date.
(you can cancel them manually too - we'll talk more about that in the Editing eConfirmations section)

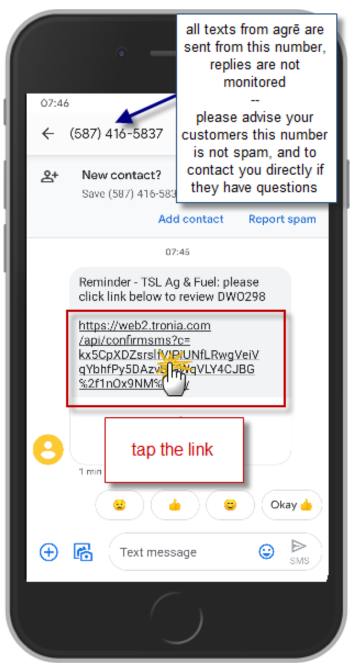
Customer Confirmation/Denial



sample confirmation email

If the customer received an email, they click either **Confirm** or **Deny**.

The "From" address will be what you set at the User or Company level.

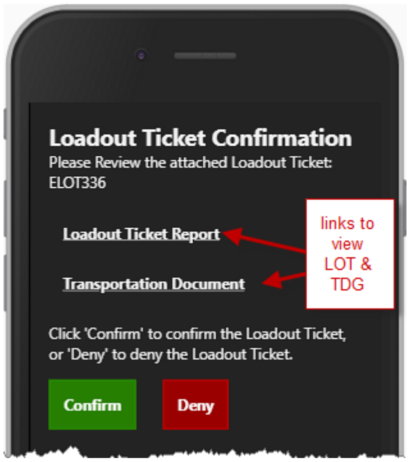


sample confirmation text

If the customer received a text message, they select the included link.

We have reserved several phone numbers for texting. All eConfirmation texts will be sent from one of the following numbers:

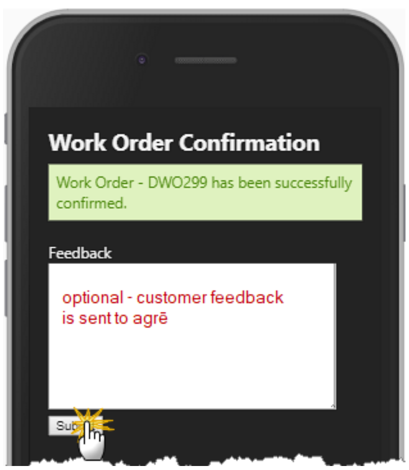
- 1.306.985.0099
- 1.306.985.9002
- 1.431.301.4834
- 1.587.805.2080

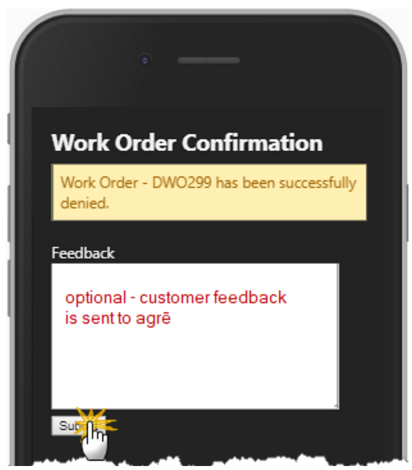


The confirmation webpage opens and they have a link to view each report, and to the usual options - **Confirm** or **Deny**.

For both email and text: as soon as a choice is made, the response is sent to agrē.

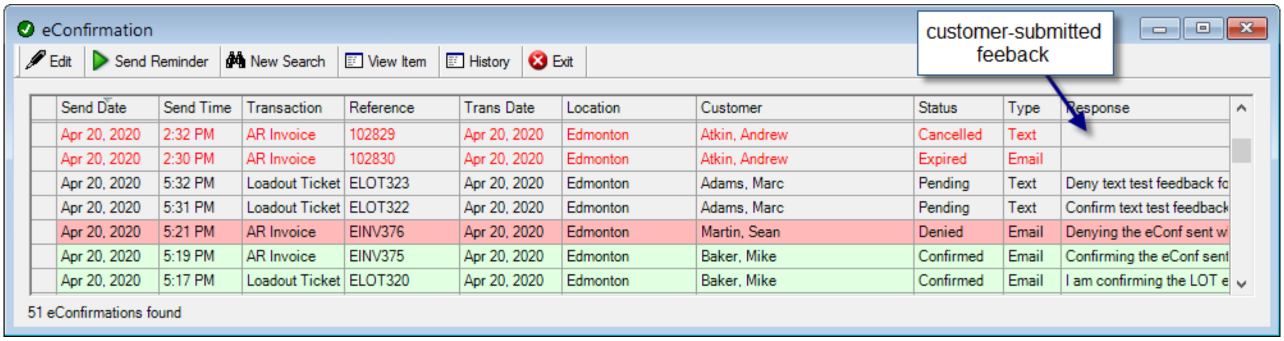
After the customer makes their selection, a **Confirmation** page is displayed that allows them to send you additional **Feedback**.





Managing eConfirmations

An ***eConfirmation*** record is created automatically each time a confirmation is sent. Existing eConfirmations can be edited, but new ones cannot be added manually.



Accounts Receivable > eConfirmations

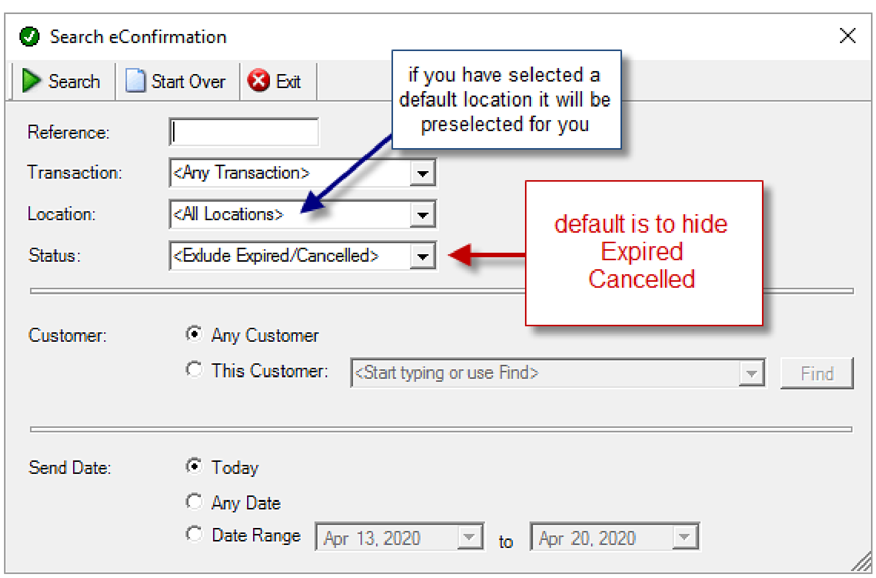
The grid is color-coded based on the eConfirmation ***Status***:

- Pending
- Confirmed
- Denied
- Cancelled/ Expired

This quickly identifies the status of each eConfirmation.

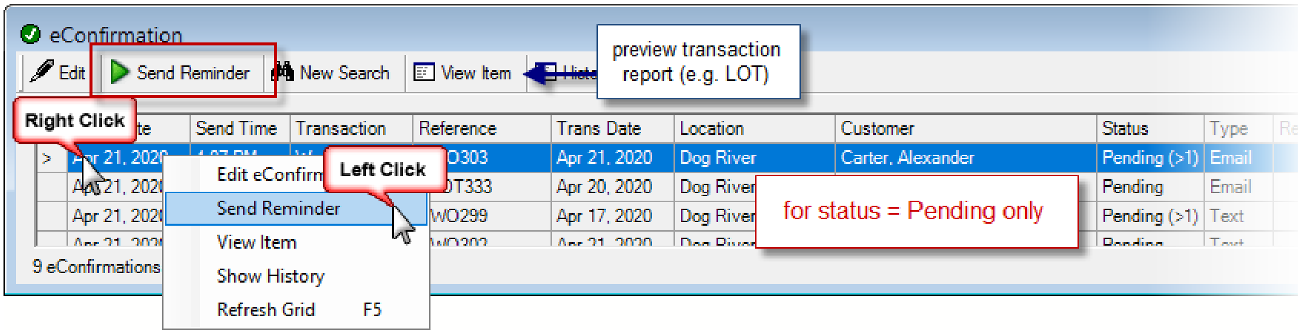
Search form

Search for eConfirmations using attributes to filter the results.



Sending Reminders

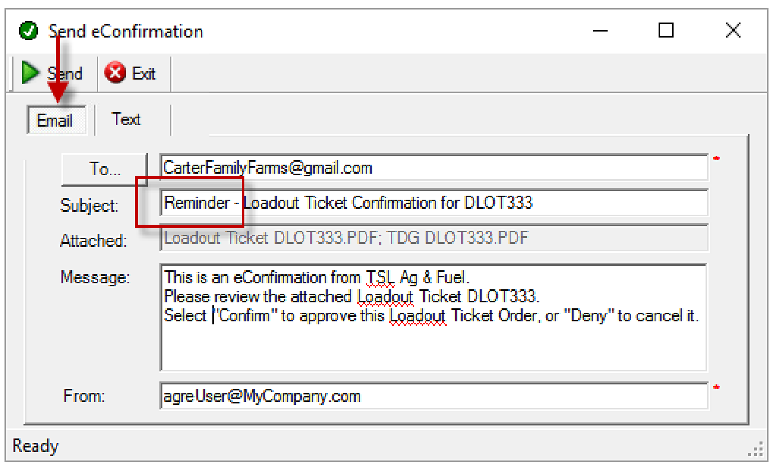
Reminders can be sent for **pending** eConfirmations. A reminder sends the *same* eConfirmation to the recipient (or a different recipient). When the reminder is sent the **Send Date/Time**, **Recipient**, and **Type** are updated. Multiple reminders can be sent.



Accounts Receivable > eConfirmation

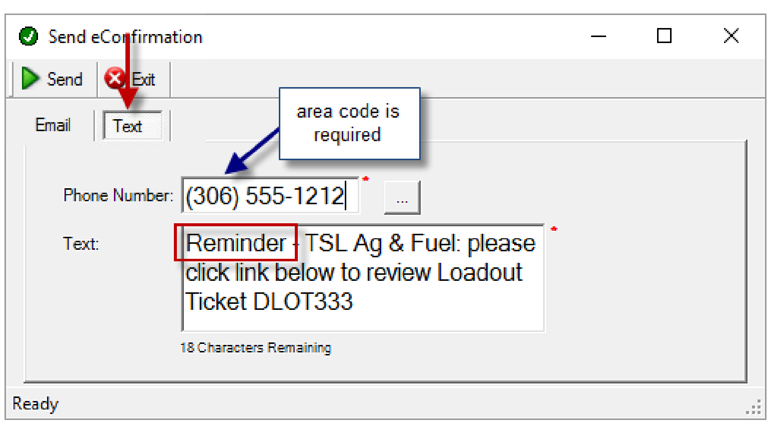
The important thing to remember is sending a ***Reminder*** updates an *existing* eConfirmation, it doesn't create a new one.

If sent by **email**, the Subject is the same as the original prefaced by "Reminder".



the Reminder can be sent via email or text

If sent by **text**, the text is the same as the original prefaced by "Reminder".

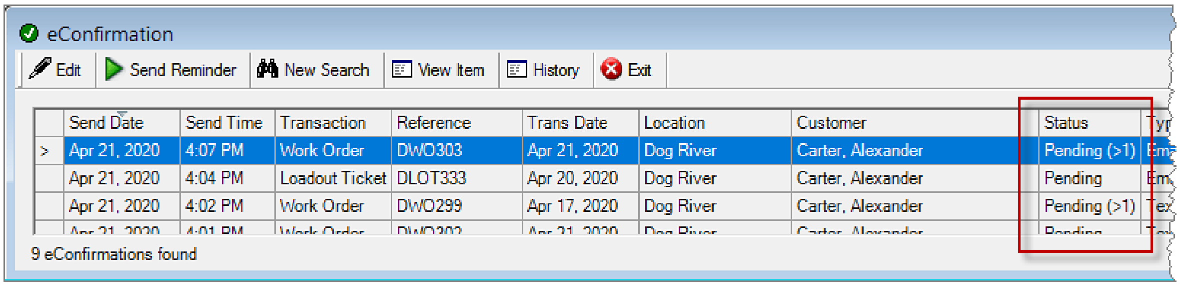


sending by text requires a 10 digit phone number

Editing eConfirmations

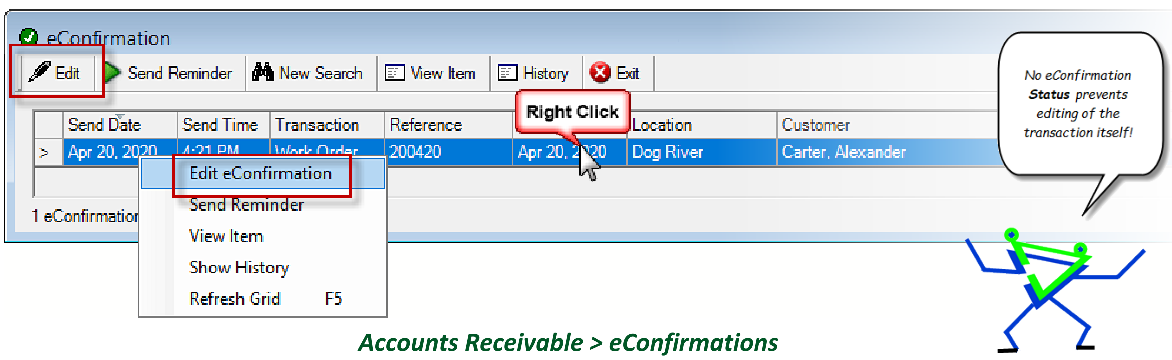
Although ***eConfirmations*** can't be *added* manually, the ***Status*** can be *edited*. If the eConfirmation you want to edit is not displayed by default, change the ***Search*** criteria to include it. You may need to expand the date range for the ***Send Date*** depending on when it was sent.

If a transaction has more than one ***Pending*** eConfirmation, the ***Status*** will let you know.



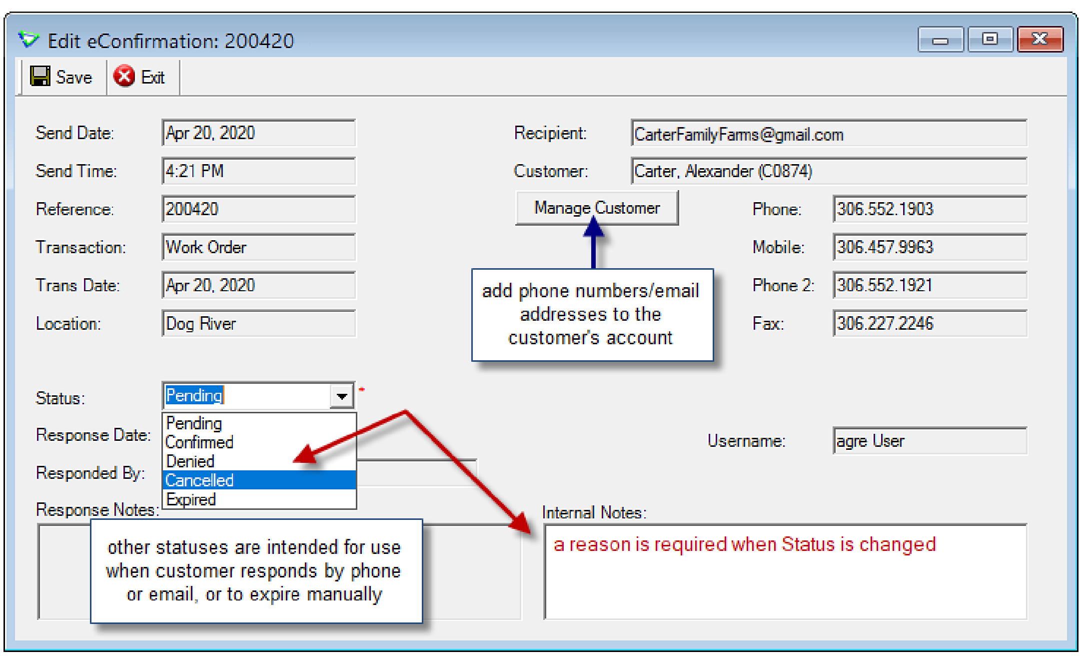
Accounts Receivable > eConfirmation

Since you no longer want the customer to respond to an old eConfirmation request, it should be **cancelled**.

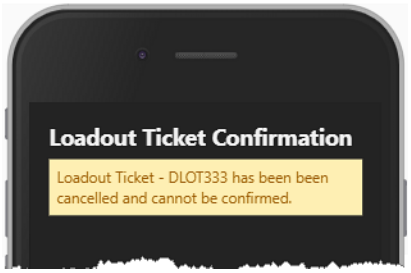


Accounts Receivable > eConfirmations

Change the ***Status***, add the reason to the ***Internal Notes***, and ***Save***.



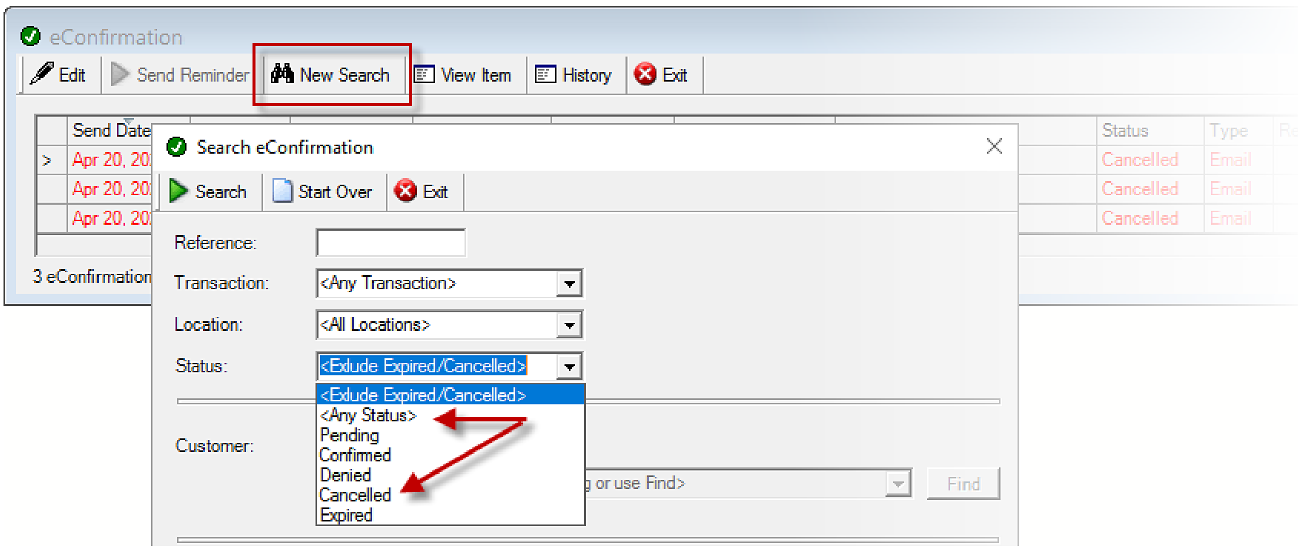
Accounts Receivable > eConfirmation > Edit



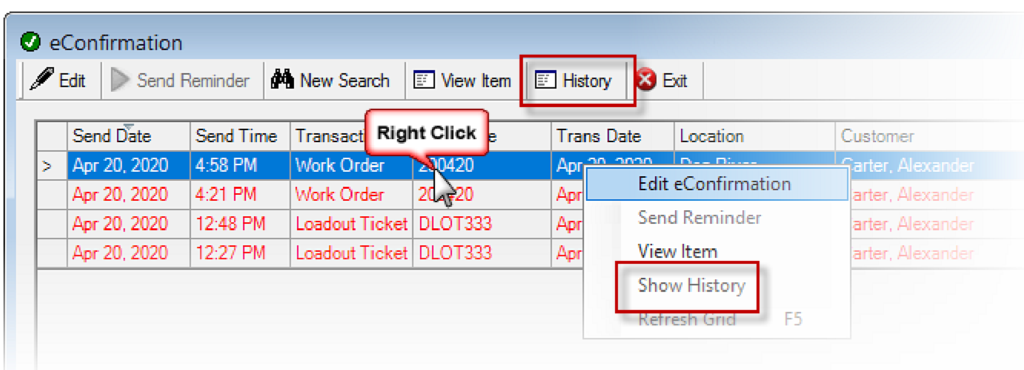
The customer will still have received the ***eConfirmation***, but they can ignore it as a cancelled one cannot be confirmed or denied.

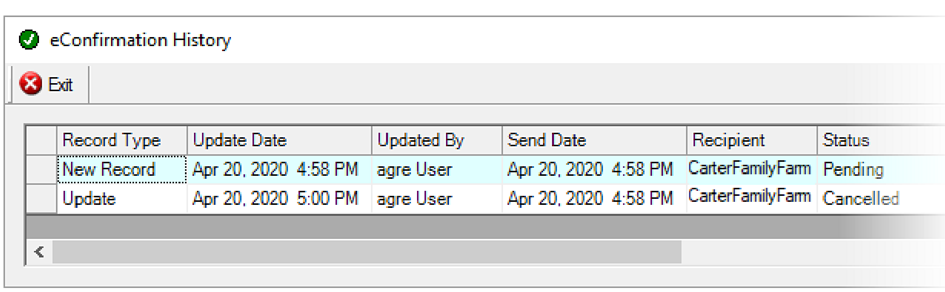
(they'd get a similar message if they tried to Confirm or Deny an expired one too)

Cancelled eConfirmations are not displayed by default. Change the Search ***Status*** to **<Any Status>** or to **Cancelled**.



You can view the ***History*** of any eConfirmation (keep in mind a transaction may have multiple eConfirmations, so a single one may not include the entire history of the transaction).





eConfirmation Reports and Exports

Data Exports

- ✓ Audit/Admin: eConfirmation – Invoices
- ✓ Audit/Admin: eConfirmation – Loadout Tickets
- ✓ Audit/Admin: eConfirmation – Work Orders