





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.

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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. 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.)

Edit Role LordOfTheUniverse				
🔚 Save 🐳 Delete 😵 Exit				
Role Permissions				
Accounts Receivable Inventory Accounts Payabl	e General Ledger Blending	Grain Agronom	y Administration	ī
Item	Action	Allow?	Deny?	Allow All
eConfirmation	Edit	N/		
	Enable on menu	\sim		Deny All
				·
				Clear All

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:

Company Level Settings	
🖬 Save 😵 Exit	
General Accounts Receivable Blending Accounts Payable General Ledger Inventory Agronomy Grain Reports	Messages
Invoices Loadout Tickets Work Orders AR Release No AR Payments Customers Statement/Invoice Emailer	Confirmation
Automatically Expire Pending Co Expire In: 7 Days (optional) have eConfirmations expire automatically in the number of days that best fits your workflow Use [REFNO] to show the refer	rence number.
Work Order	
Enable Email Note: This is an econtinimation from 15c Ag & role. Please review the attached Work Order [REFNO]. Please review the attached Work Order, or "Deny" to cancel it.	
applies to Quotes too!	~
Text Note: TSL Ag & Fuel: please click link to review [REFNO]. DO NOT reply to this message.	0
Loadout Ticket	^
	~
(optional) send the TDG Report along for the ride SL Ag & Fuel: please click link to review [REFNO]. DO NOT reply to this message.	0
Invoice	
Image: Finable Email Note: This is an eConfirmation from TSL Ag & Fuel. Please review the attached Invoice [REFNO]. Select "Confirm" to approve this Invoice, or "Deny" to cancel it.	^
Prompt on Save	~
Text Note: TSL Ag & Fuel: please click link to review [REFNO]. DO NOT reply to this message.	<u></u>

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.

🐦 Company Level Settings		
🔚 Save 😵 Exit		
General Accounts Receivable Blending	Accounts Payable General Ledger Inventory Agronomy R	leports Messages
Report Options Email Defaults Default	Criteria Customer Name Formatting Blends on Reports eSig	nature
Report Email Defaults		
Emailed reports are sent from:	someone@ yourcompany.com	
Email Body Default for Attachments:	Please see the attachment for the [REPORTNAME] report.	
	Use [REPORTNAME] where the name of the report should appear.	
Attached Filename Default:	CompanyName Reportname RefNo Date.PDF	

File > Config Options > Company

Location Configuration Options

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

V Config Options for Location	
Save Start Over SExit	
Location: Dog River Retrieve	
Invoice/Loadout Ticket	-eConfirmation
Offer Early Payment Discount Apply unapplied credits automatically	Enable Prompt on Save Work Order Yes Yes
Apply return credits to invoice first	Loadout Ticket
How to apply remaining credits	

File > Config Options > Location

User Configuration Options

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

🐦 Config Options for User	- • ×
🔚 Save 🗋 Start Over 🔇 Exit	
User: agre User Retrieve	
Miscellaneous AR/AP Blending Reports Email Agronomy Advanced	
Beport Email Defaults	
Emailed reports are sent from: agreUser@MyCompany.com	
BCC the From address	
Email Body Default for Attachments: If you have any questions regarding this email, please contact:	~

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).

♥ Company Level Settings
🖬 Save 😵 Exit
General Accounts Receivable Blending Accounts Payable General Ledger Inventory Agronomy Grain Reports Messages
Report Options Email Defaults Default Criteria Customer Name Formatting Blends on Reports
Report Email Defaults
Emailed reports are sent from: eConfirmation@TSLAgFuel.ca
Email Body Default for Please see the attachment for the [REPORTNAMEL

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 ...

	٩dd	Loadout Ticket						- • •
	<u>S</u> ave	👥 📜 Documents 🛛 🔯 <u>R</u> efresh 🛛 💲 Vie	w Cr <u>e</u> dit 🛛 😣 E	xit				
R	efere	ance: Genera	te Reference Au	tomatically				
С	ustor	mer: Carter, Alexander (C0874)		▼ Find	Add Lo	cation:	Dog River	▼ *
D	ate:	Apr 17, 2020 💌 🎽			Cr	eated By:	agre User	
Ci	ustom	er and Shipping Products (2) Additional Info	ormation					
		Product (Delivered Units)	Quantity	WO/Invoice Ref	Location	Billed?	Billing Units	Aut. Blender
		DEKALB7255 - Dekalb 72-55 Canola (BG)	10.0	DWO299	Dog River		BG - Bag	
					Dee Diver		IUC him	

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).

Send eConfirm	ation
🕨 Send 🛛 😣 Exit	
Email Text	l
hat a stress prover here	

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.

Work Orders					
+ Add / Edit X Delete	New Search	Previe	w Item 👻 🖾 History	😢 Exit	
Customer	△ Order Dat Rig	ght Click	е Туре	Status	Work
Carter, Alexander Work Orders found	Jun 15, 2022	100 March	Add Work Order Edit Work Order	3	0 DWC
			Copy Work Order Preview Work Order		,
		*	Preview PDF	lick	
		0	Send eConfirmation Refresh Grid F	5	

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.

Bit Loadout Ticket: DLOT333		
Save X Delete 🖡 Documents 😨 Refresh	🗉 History 💲 View Credit 🔇 Exit	
Reference: DLOT333		
Custome Send eConfirmation	− □ × Dog River	*
Date:	Email Addresses	×
Email Text	Company Address Book	
Pr To > DI Subject: Loadout Ticket Confirmati BI Attached: Loadout Ticket DLOT333 Add F Message: This is an eConfirmation fr	Search Find Email Groups:	All Groups
Imp Select "Confirm" to appro	Name Email Role/Gro	Supplier
	Statement Email CarterFarms@gmail.ca	Supplier
From: agreUser@MyCompany.c	David St. Hubbins david@email.com Operation	ns Supplier
Ready	Viv Savage viv.savage@email.com Account	ant Supplier v
	To-> CarterFarms@gmail.ca	
		OK Cancel

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.

Send eConfirmation Send & Exit Email Text	select Exit to cancel sending eConfirmation	×						
To alex.carter@gma	il.com	*						
Subject: Loadout licket 0	Confirmation for DLO 1333							
Attached: Loadout Ticket [DLOT333.PDF; TDG DLOT333.PDF							
Message: This is Conf Please Select	text can be edited	3. er, or "Deny" to cancel it.						
From: agreUser@MyCo	agreUser@MyCompany.com							
Ready								

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.

Send eConfirmation		— [X		
Send Exit Email Text area co requin Phone Number: (306) 555-1212	ide is red	_			
Text: text can be edited	ase click link adout Ticket				
DECTOS	♥ Phone Book ▶ Use Selection	Exit	×		
	Phone Number	Description			
, 29 Characters Remaining	> 306.457.9963	Mobile			
	306.552.1903	Phone 2			
	780.989.2302	David St. Hu	bbins (Mobile)		
Ready	780.459.1202	David St. Hu	bbins (Phone)		

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*.

Send eConfirmation		_	_	×
Email Text	cel sending	<u> </u>		
Phone Number: (306) 555-12 Text: TSL Ag & Fu review DLOT this message 29 Characters Remain	212 iel: please cl 3335. DO NC e.	lick link to)T reply to	-	
Ready				

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

	•	all texts from agrē are sent from this number, replies are not monitored
€	(587) 416-5837	please advise your customers this number is not spam, and to
완	New contact? Save (587) 416-583	contact you directly if they have questions
	Ado	d contact Report spam
	07	:45
	Reminder - TSL Ag click link below to	g & Fuel: please review DW0298
	https://web2.troni /api/confirmsms7 kx5CpXDZsrslfvr qYbhfPy5DAzvar %2f1n0x9NM%	a.com ice YUNfLRwgVeiV YgVLY4CJBG J
0	1 min	e link
		🖌 🙂 Okay 📥
Ð	Text mess	age 😮 ⊳
)

sample confirmation text

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.

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.

0								nitted	×		
	Send Date	Send Time	Transaction	Reference	Trans Date	Location	Customer	Status	Туре	Response	^
	Apr 20, 2020	2:32 PM	AR Invoice	102829	Apr 20, 2020	Edmonton	Atkin, Andrew	Cancelled	Text	-	
	Apr 20, 2020	2:30 PM	AR Invoice	102830	Apr 20, 2020	Edmonton	Atkin, Andrew	Expired	Email		
	Apr 20, 2020	5:32 PM	Loadout Ticket	ELOT323	Apr 20, 2020	Edmonton	Adams, Marc	Pending	Text	Deny text test feedback	fo
	Apr 20, 2020	5:31 PM	Loadout Ticket	ELOT322	Apr 20, 2020	Edmonton	Adams, Marc	Pending	Text	Confirm text test feedba	ck
	Apr 20, 2020	5:21 PM	AR Invoice	EINV376	Apr 20, 2020	Edmonton	Martin, Sean	Denied	Email	Denying the eConf sent	w
	Apr 20, 2020	5:19 PM	AR Invoice	EINV375	Apr 20, 2020	Edmonton	Baker, Mike	Confirmed	Email	Confirming the eConf se	ent
	Apr 20, 2020	5:17 PM	Loadout Ticket	ELOT320	Apr 20, 2020	Edmonton	Baker, Mike	Confirmed	Email	I am confirming the LOT e	
5	l eConfirmations fo	ound		1		1		1			

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.

Search eConf	irmation	Х
Search 🗋 S	Start Over 😣 Exit if you have selected a default location it will be	
Reference:	preselected for you	
Transaction:	<any transaction=""></any>	
Location:	<all locations=""> default is to hide</all>	
Status:	<exlude cancelled="" expired=""></exlude>	
Customer:	Any Customer	
	C This Customer: <pre>Start typing or use Find></pre>	Find
Send Date:	Today	
20112 2010.	C A D I	
	O Any Date	
	C Date Range Apr 13, 2020 v to Apr 20, 2020 v	/

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.

eConfirmatio	on d Reminder	🗉 View Item 🗲 H	preview report	transaction (e.g. LOT)				
Right Click te	Send Time Transaction	Reference Tr	ans Date	Location	Customer	Status	Туре	
> >r 21, 202	E File Config	0303 Ap	or 21, 2020	Dog River	Carter, Alexander	Pending (>1)	Email	
Apr 21, 2020	Edit eConfirm	ЪТ333 Ар	or 20, 2020	Dog River		Pending	Email	
Apr 21, 2020	Send Reminder	WO299 Ap	or 17, 2020	Dog River for S	for status = Pending only		Text	
Apr 21 2020	View Item 🗸	1×/COOO /~	- 01 0000	Des Piyer		Ponding	Tout	
9 eConfirmations	Show History							
	Refresh Grid F5							

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".

Send eConfirmation -	×	1					
Send 😵 Exit							
Email Text							
To CarterFamilyFams@gmail.com	-						
Subject: Reminder - Loadout Ticket Confirmation for DLOT333							
Attached: Loadout Ticket DLOT333.PDF; TDG DLOT333.PDF							
Message: This is an eConfirmation from TSL Ag & Fuel. Please review the attached Loadout Ticket DLOT333. Select 'Confirm" to approve this Loadout Ticket Order, or "Deny" to cancel it.							
, From: agreUser@MyCompany.com							
Ready		:					

the Reminder can be sent via email or text

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

Send eConfirmation	-	×
Send Exit Email Text Phone Number: (306) 555-1212		
Text: Reminder TSL Ag & Fuel: please click link below to review Loadout Ticket DLOT333		
18 Characters Remaining		

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.

	Edit 🕨 Send f	Reminder	New Search	🗉 View Item 🛛 🗉] History 🛛 😣 E	xit			
	-							-	
	Send Date	Send Time	Transaction	Reference	Trans Date	Location	Customer		Status
>	Apr 21, 2020	4:07 PM	Work Order	DWO303	Apr 21, 2020	Dog River	Carter, Alexander		Pending (>1)
	Apr 21, 2020	4:04 PM	Loadout Ticket	DLOT333	Apr 20, 2020	Dog River	Carter, Alexander	Γ	Pending
	Apr 21, 2020	4:02 PM	Work Order	DWO299	Apr 17, 2020	Dog River	Carter, Alexander	T	Pending (>1)
	Apr 21 2020	4-01 DM	Work Order	DIMO202	Apr 21 2020	Deg Piwer	Cortor Movandor	T	Dending

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*.

😺 Edit eConfir	mation: 200420					- • •
📕 Save 🔞 E	kit					
Send Date:	Apr 20, 2020		Recipient:	CarterFamilyFa	arms@gmail.c	om
Send Time:	4:21 PM		Customer:	Carter, Alexan	nder (C0874)	
Reference:	200420		Manage Cu	tomer	Phone:	306.552.1903
Transaction:	Work Order		T		Mobile:	306.457.9963
Trans Date:	Apr 20, 2020		add phone numb	ers/email	Phone 2:	306.552.1921
Location:	Dog River		addresses t customer's a	o the ccount	Fax:	306.227.2246
Status: Response Date: Responded By:	Pending Pending Confirmed Denied		_	Use	ername:	agre User
Response Notes other when or e	Cancelled Expired statuses are intended fo customer responds by p email, or to expire manua	r use hone ally	Internal No a reaso	^{tes:} n is required	when Statu	is is changed

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**.

🖉 eConfirma	tion								
🖉 Edit 📄 S	end Reminder	New Search 📰 View Item	History	🔇 Exit					
Send Date > Apr 20, 20 Apr 20, 20 Apr 20, 20 3 eConfirmation	Search eCon Search Con Reference: Transaction: Location:	firmation Start Over SExit CAny Transaction> CAll Locations>				×	Status Cancelled Cancelled Cancelled	Type Email Email Email	
	Status: Customer:	KEXude Expired/Cancelled <exude cancelled<br="" expired=""><any status=""> Pending Confirmed Denied Cancelled Expired</any></exude>	J> J> J or use	ie Find>	×.	Find			

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).

	zait 🛛 🖉 Sena F	Keminder	New Search		E History			
	Send Date	Send Time	Transact Rig	ht Click e	Trans Date	e Locat	ion C	ustomer
	Apr 20, 2020	4:58 PM	Work Order	200420	Apr 20 20	<u></u>		
	Apr 20, 2020	4:21 PM	Work Order	20 20	Apr	Edit eConf	irmation	arter, Alexande
	Apr 20, 2020	12:48 PM	Loadout Ticket	DLOT333	Apr	Send Rem	inder	arter, Alexande
	Apr 20, 2020	12:27 PM	Loadout Ticket	DLOT333	Apr	View Item		arter, Alexande
						Show Hist	ory	
					L	Show Hist Refresh Gr	ry rd F5	
	eConfirmati	ion History				Show Hist Refresh Gr	F5	
•	eConfirmati Exit Record Tyr	ion History	Date	Updated By	Send Date	Show Hist Refresh Gr	Recipient	Status
•	eConfirmati Exit Record Ty New Record	on History 2e Update d Apr 20,	Date 2020 4:58 PM	Updated By agre User	Send Date Apr 20, 202	Show Hist Refresh Gr 0 4:58 PM	Recipient CarterFamilyFarm	Status Pending

eConfirmation Reports and Exports

Data Exports

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