# agrē



## EXPORTING SALES DATA FOR AGCOLLECT

If your company provides sales information to *AgCollect*, you can easily export and email the EMR (Electronic Manufacturer Report) sales information you have recorded in agrē. The agrē *AgCollect Export* includes sales (on invoices) and sales-to-be (on work orders) to eligible customers of products flagged as "AgCollectable".

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### How does agrē know what sales information to include?

agrē knows which **products** AgCollect is interested in by their **Manufacturer**. In conjunction with AgCollect, Tronia maintains a list of manufacturers that participate in the program and only sales data for products associated with AgCollect manufacturers will be exported.

#### Participating AgCollect Manufacturers

- Aquatrols Corporation
- Belchim Crop Protection Canada
- Brett Young
- CORTEVA
- DuPont Crop Protection
- Gowan

- IPCO
- NuFarm Agriculture
- Nuseed Global
- Production Agriscience Canada Co.
- UPL AgroSolutions Canada Inc.

By default, agrē will export AgCollect sales data of EMR **products** to all **customers** unless you have specified to exclude them. You can also combine sales results for multiple customers by setting up **Customer Associations**.

#### Setting Up AgCollect Manufacturers

Start by confirming your list of *Manufacturers* is accurate. Each participating manufacturer needs to be associated with its corresponding AgCollect *EMR Manufacturer*.



Inventory > Manage > Manufacturers

## **Note** You can spell the *Manufacturer* name however you like. It does not need to be an exact match to the *EMR Manufacturer* name.

As **not every manufacturer participates** in the AgCollect program, you will likely have manufacturers with no EMR Manufacturer selected. Sales data for their products will not be included in the *AgCollect export*.

Vanage Manufacturers	2 
Manufacturer	EMR Manufacturer
BASF Canada	-
Bayer	
BAYER CROPSCIENCE INC.	
	Ĩ

#### Setting Up AgCollect Products

Each reportable product must be tagged with an AgCollect manufacturer to have its sales included.

Save	Edit Product: 30	63559 - CURTAIL M 8 L			
Product       Units       Inventory       Notes       Associated Products       Blending       Manufacturing       Dangerous Goods       Regulations         Image: This product is active.       Image: This	Save 🕄 Refresh	🗙 Delete 💲 Prices/Taxes 🔇 Exit			
This product is active.       Inventory Item?       Retunable?         Product Code:       3063559       Blendable?       Prohibit Purchase?         Description:       CURTAIL M 8 L       Manufactured?       Exclude From AgCollect?         Short Desc:       Dangerous Good?       Overridable Sales Account?         Product Type:       50CPROT-HERBICIDES (5075004)       Add       Omit From Sales Reports?       Exclude From Discount Grou         UPC Code:       859362001220        Lot Number Required?         Default Project:       Add        Lot Number Required?	Product Units Inv	rentory Notes Associated Products Blending	Manufacturing   Dar	ngerous Goods   Regulations	
Product Code:       3063559       Blendable?       Prohibit Purchase?         Description:       CURTAIL M 8 L       Manufactured?       Exclude From AgCollect?         Short Desc:       Dangerous Good?       Overridable Sales Account?         Product Type:       50CPROT-HERBICIDES (5075004)       Add       Omit From Sales Reports?       Exclude From Discount Group         UPC Code:       859362001220        Lot Number Required?         Default Project:       Add        Lot Number Required?         Manufacturer:       NUFARM AGRICULTURE INC		This product is active.		✓ Inventory Item?	Returnable?
Description:       CURTAIL M 8 L       Manufactured?       Exclude From AgCollect?         Short Desc:       Dangerous Good?       Overridable Sales Account?         Product Type:       50CPROT-HERBICIDES (5075004)       Add       Omit From Sales Reports?       Exclude From Discount Grou         UPC Code:       859362001220        Add       Omit From Sales Reports?       Lot Number Required?         Default Project:       Add        Add        Interfacture in the form the sales in the sale in the	Product Code:	3063559	-	Blendable?	Prohibit Purchase?
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UPC Code: 859362001220 Cot Number Required?	Product Type:	50CPROT-HERBICIDES (5075004)	✓ Add	Comit From Sales Reports?	Exclude From Discount Groups
Default Project:	UPC Code:	859362001220			Lot Number Required?
Manufacturer: NUFARM AGRICULTURE INC	Default Project:		✓ Add		
	Manufacturer:	NUFARM AGRICULTURE INC	▼		
Manut, Prod. Code:  CURTAIL	Manuf. Prod. Code	CURTAIL			

Inventory > Manage > Products

For products that have *two* AgCollect manufacturers (treated seed, for example) you can indicate the second one by clicking more options [...] next to *Manufacturer*, then selecting it from the drop-down menu.

Edit Product: 30	58807 - AC GOLIATH CRESTED WHEATGRASS	
Save 🕼 Refresh	🗙 Delete 💲 Prices/Taxes 🔇 Exit	
Product Units Inv Product Code: Description: Short Desc:	rentory Notes Associated Products Blending Manufacturing Dan This product is active. 30558807 AC GOLIATH CRESTED WHEATGRASS Dangerous Good? Overridable Sales.	? ollect? Account?
Product Type: UPC Code: Default Project:	Seed Add Omit Førm Sales Reports? Exclude From Disc	ount Groups?
Manufacturer: Manuf. Prod. Code	BRETT-YOUNG (FORAGES)	
GL Accounts	Please choose secondary Manufacturer for external reporting:	
COGS:	45005 - Sales Seed	•
Inventory:	15055 - Seed FMC: Aquatrols Corporation	
Inv. Accrual:	16055 - Seed Accruals     Image: Seed Accruals       Add GL Account     Brett Young       CORTEVA     DuPont Crop Protection Gowan       IPCO     Image: Seed Accruals	

Inventory > Manage > Products

Both manufacturers will be included in the export.

#### **Excluding Sales Data for Specific Products**

Products from EMR manufacturers that do *not* need to be reported to AgCollect (like demo seed, or last year's chemical) can be excluded from the results.

😺 Edit Product: BY	(4414RRBB - 4414 Ultracoat/Helix Xtra with Bioboost (	(25 kg bag) 🛛 👔	
Save 🕼 <u>R</u> efresh	X Delete 💲 Prices/Taxes 🔇 Exit		checking this box will EXCLUDE
Product Units Inv	rentory   Notes   Associated Products   Blending   Manufacturing   Dange	erous Goods   Regulati	this product's sales from the AgCollect export
	This product is active.	🔽 Inventory Ite	
Product Code:	BY4414RRBB	Blendable?	Frohibit Purchase?
Description:	4414 Ultracoat/Helix Xtra with Bioboost (25 kg bag)	Manufacture	d? Sxclude From AgCollect?
Short Desc:		Dangerous G	iood? Uverridable Sales Account?
Product Type:	Seed Add	Comit From Sa	ales Reports? 🔲 Exclude From Discount Groups?
UPC Code:			man how have have have have have have have have

Inventory > Manage > Products

#### **Excluding Sales Data for Specific Customers**

Customers whose sales data should *not* be included in the AgCollect export should be flagged as *Exclude from external reporting*.

🕵 Edit C	ustomer: V	Vallace, Te	ed (1051)		
🔛 Save	🛱 Refresh	History	48 Associations	😢 Exit	
Customer	Addresses	Contacts Cr	edit/Finance   Tax	Exceptions	Permits Farm Info Notes Comments CRM
Custon	ner Code:	1051	•		Customer is active.
Last Na	ame/Company	Wallace		•	Primary Phone:
First N	ame:	Ted			Secondary Phone:
Alias:		-			Fax Number:
Locatio	on:	Dog River		-	Mobile Number:
AR Acc	count:	11210 - A	ccounts Receivabl	e 🔻	Company Email:
Price L	.evel:	Retail		•	Add Company Website:
Discou	int Group:			•	Add Customer Since:
Sales F	Representative	e [		-	Include this customer in batch statement runs
Membe	ership Number	: [			Exclude from external reporting?
Charac	cteristics:	Char	acteristics		Email Statements? Email Invoices?
		2		<u> </u>	Statement/Invoice Email:
		Ad	d Rer	nove	checking this box will EXCLUDE this customer's sales from the AgCollect export

Accounts Receivable > Manage Customers

#### **Combining Sales Data from Multiple Customers**

Setup customer *Associations* to combine sales results for multiple customers. In this example, all AgCollect sales for Heather Bean will be rolled up and added to sales for Bean Family Farms.

Save 🕼 Refresh	All Associations & Exit	
stomer   Addresses   Contacts	s   Credit/Finance   Tax Biceptions   Permits   Farm Info   Notes   Comments   CRM	
Customer Code:	07	
Last Name/Company: Bear	Associations of Bean, Heather	<b></b>
First Name: Heat	th Save 🛛 😵 Exit	
Alias:	Associate Bean, Heather with:	
Location: St. A	Ag Collect: Bean Family Sams (C0001)	Find
AR Account: 112	10 Sales Export: Bean Family Parms (C0001)	Find
Price Level: Reta	al contraction ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (	
Discount Group:	Customers that are associated to Bean, Heather:	
Construction of the second	Customer Role	

Accounts Receivable > Manage Customers

Viewing the *Associations* for Bean Family Farms tells you whose results will be combined under that account.

Edit Customer:	Bean Family Farms	(C0001)		
Save 🚯 Refrest	n 🔄 History 🕰 Assoc	siations		
ustomer Address	Associations of I	Bean Family Farms	······································	
Customer Code:	🔚 Save 🔞 Exit			
Last Name/Comp	Associate Bean Fam	ly Farms with:		
Alias:	Ag Collect:	Already configured as Parer	nt Find	
Location:	Sales Export:	Already configured as Parer	nt 💽 Find	
AR Account:	Customers that are a	ssociated to Bean Family Farn	ns:	
Price Level:	Customor		Rele	
Discount Group:	Bean, Heather ( Bean, Jim (C00	C0002) D3)	Ag Collect Ag Collect	-
Sales Represent	Bran, Maather (	C0002)	Salas Export	

Sales for Bean Family Farms *and* Heather Bean *and* Jim Bean will be combined on the export and reported under the name of Bean Family Farms. No individual sales will be reported for the child accounts – so you won't see Heather's and Jim's names listed in the export file.

#### Default Destination Folder (optional)

Select a *Default Export Path* for the exported data files.

You can always change the destination on the fly if you want a certain one to be exported to a different path.

Save       Start Over       Start         Miscellaneous       AR/AP       Blending       Reports       Email       Agronomy       Advanced         Report Options       Default Criteria </th
Miscellaneous AR/AP Blending Reports Email Agronomy Advanced Report Options Default Criteria
Report Options Default Criteria
Default Export/Import Paths Export: \\Client\Z\$\agreReports\
Default Export/Import Paths Export: \\Client\Z\$\agreReports\
Export: \\Client\Z\$\agreReports\
Browse
· · · · · · · · · · · · · · · · · · ·

File > Config Options >Users

HelpPlease refer to File > Exports > Data Exports > Hosted Users: Selecting a<br/>Destination for Exported Files in online Help for more information about<br/>choosing a destination folder when exporting data. It must be available<br/>outside of agrē.

### Exporting and Emailing AgCollect EMR Information

#### To export AgCollect EMR information

 Navigate to *File > Exports > AgCollect EMR*. The *AgCollect Export* window opens.

V AgCollect	Export	- • •
🖉 Export 🖋	Export and Email 😣 Exit	
Manufacturer: Location:	<b>▼</b>	•
Start Date:	May 01, 2023 💌	•
End Date:	Sep 30, 2023 💌	•
Folder Name:	\\Client\Z\$\agreReports\	Browse Folders
	<ul> <li>Omit Work Orders</li> <li>Add product line comments.</li> </ul>	

File > Exports > AgCollect EMR

- In the *Manufacturer* box, enter the manufacturer of the sales you are reporting (or all manufacturers).
- In the *Location* box, enter the location of the sales you are reporting (or all locations).
- In the *Start Date* box, optionally change the start date of the sales data you are reporting. All sales and orders made on or after this date (up to the end date) are exported. One week before today's date is selected by default.
- In the *End Date* box, optionally change the end date of the sales you are reporting. All sales and orders made between the start date and this date are exported. Today's date is the default.
- Click *Browse Folders* to select a destination folder.
- HelpPlease refer to File > Exports > Data Exports > Hosted Users: Selecting a<br/>Destination for Exported Files in online Help for more information<br/>about choosing a destination folder when exporting data. It must be<br/>available outside of agrē.
- Check *Omit Work Orders* to exclude both *Work Orders Early Booking* [committed but not prepaid] and *Work Orders Prepay* [committed and prepaid]..
- *(optional)* Check *Add product line comments* to include Invoice product row comments.

• Click *Export* to create the file, or click *Export and Email* if you want to email the information immediately after exporting it.

AqCollect Exp	Fort Export and Email 😵 Exit	
Manufacturer:	All Manufacturers	•
Location:	All Locations	•
Start Date:	Mar 01, 2025	•
End Date:	Oct 31, 2025	•
Folder Name:	Z:\agreReports	Browse Folders
	☐ Omit Work Orders ☐ Add product line comments.	

• If you clicked *Export* a message appears indicating the export was successful, and it asks you if you want to view the folder containing the exported file. Click **Yes** to view the folder, or click **No** to close the window.



- **Caution** The .DAT file generated by agrē is in comma-separated value format (data columns are separated by a "pipe" | =- Shift + \) and can be viewed in an external program like Microsoft Excel. The **keyword here is "viewed"**. If any changes are made to the DAT file, including changing the file name, it may be rejected by the AgCollect import process or be imported incorrectly.
- Note If you are using *Customer Associations*, combined sales results will be listed only under the "parent" account. Individual "child" account sales (which were rolled up to the parent account) will not be listed.
- If you clicked *Export and Email*, a message appears indicating the export was successful, and it asks you if you want to view the folder containing the exported file. Click **Yes** to view the folder, or click **No** to close the window.

• The Send Email window opens.

🖂 Send Email	×
▶ <u>S</u> end 😵 E <u>x</u> it	
To	
Cc	agreUser@tronia.com
Bcc	and a second sec
Subject:	TSL Custom Ag & Terminal Inc. Attachment - AGCOLLECT09212021TO09272022ALL.DAT
Attached Report:	AGCOLLECT09212021TO09272022ALL.DAT
Additional Attachments	Add
Please see the attachme	ent for the AGCOLLECT09212021TO09272022ALL.DAT file.
	and the second
	and the second se
From: agreUser@tron	nia.com

- In the *To* box, enter the email address to which the AgCollect EMR information should be sent. At least one recipient address is required.
- In the *CC* or *BCC* box, optionally type your own email address to send yourself a copy or a blind copy.
- The default *Subject* identifies your company and the export file name, but it can be changed.
- Attached Report The AgCollect export file is attached automatically.
- Additional Attachments Optionally click Add to attach additional files.
- In the message text box, enter any additional information you want the recipients of the message to read.
- In the *From* box, optionally change the email address you want the AgCollect EMR email to be sent from.
   The email address you specified in your user configuration settings is entered by default but you can change it.
- Click Send.
   The email is sent, the Send Email window closes, and you're back at the AgCollect Export window.
- Click *Exit* to close the window.