# EX CHEMICAL SALES SUMMARY EXPORT

In partnership with **Alberta Environment & Parks**, Tronia Systems has developed the *Chemical Sales Summary Export.* This export is available from within agrē and easily extracts the required chemical sales summary information that pesticide vendors in Alberta are required to report to meet provincial regulatory requirements.
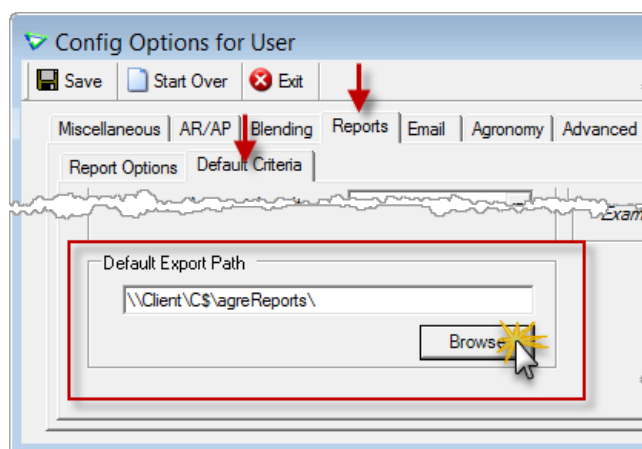
## What you'll find:

## Setup: Selecting a Default Destination Folder (*optional*)

Select a *Default Export Path* for the exported data files.
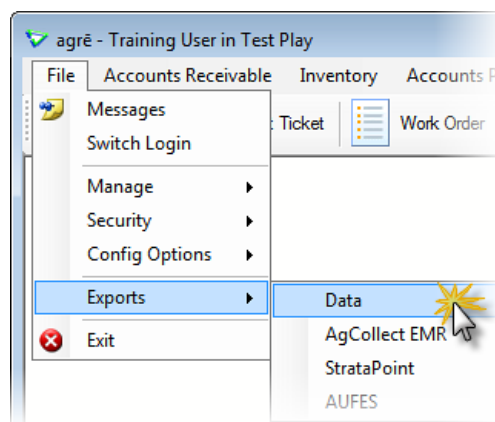You can always change the destination on the fly if you want a certain one to be exported to a different path.
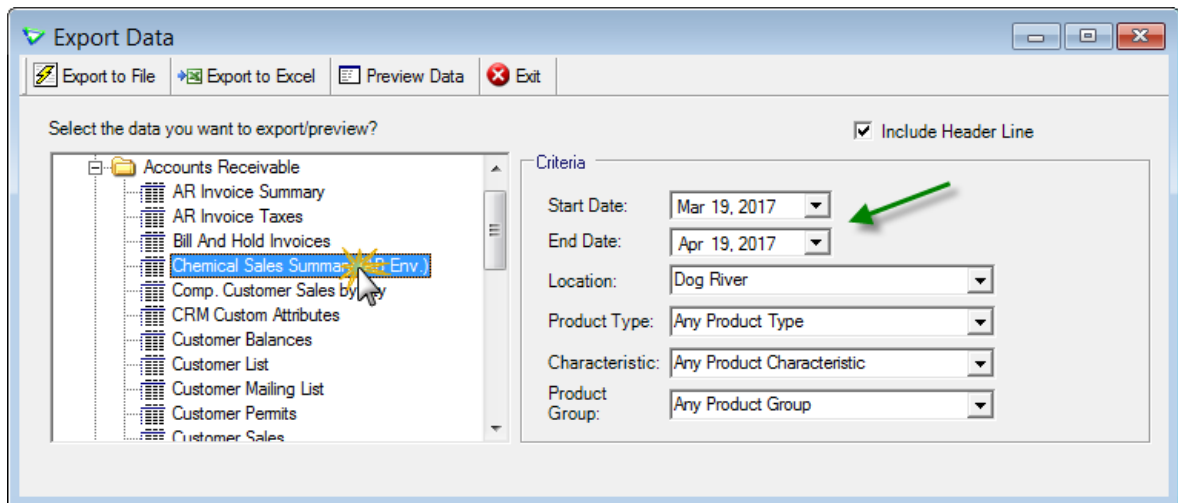


*File > Config Options >Users*

| Help | Please refer to *File > Exports > Data Exports > Hosted Users: Selecting a Destination for Exported Files* in online **Help** for more information about choosing a destination folder when exporting data. It must be available *outside* of agrē. |
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# Running the Chemical Sales Export in agrē

To access agrē's data export library navigate to: *File > Exports > Data*.



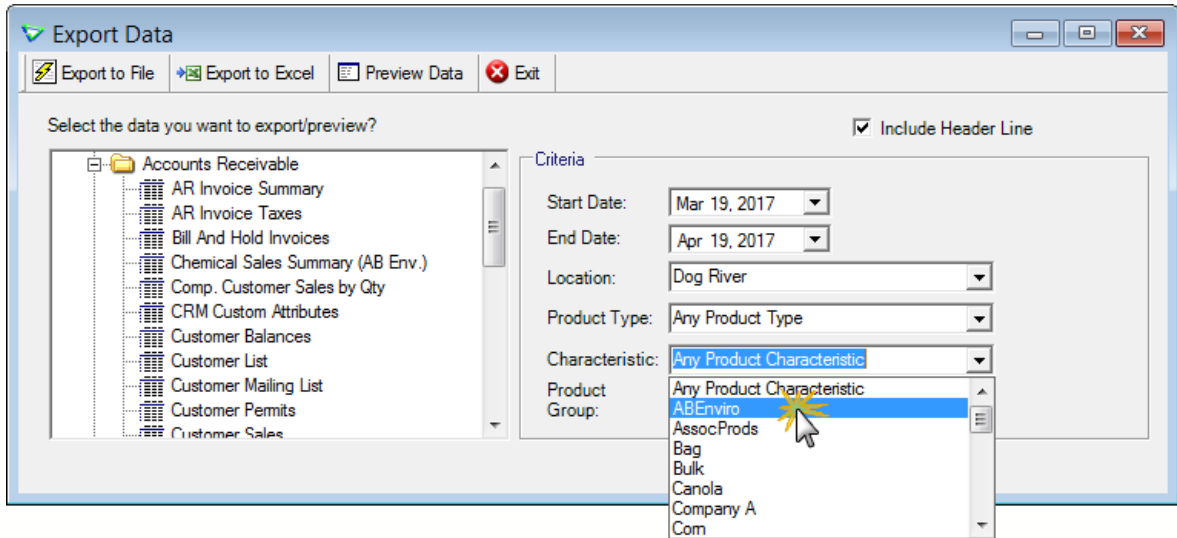Click *Accounts Receivable > Chemical Sales Summary (AB Environment)*.



Select the appropriate criteria for this export. Use the **date fields** to narrow down the sales information to just the time frame you need to report on. The date range is based on when the inventory *moved* (for example, on a loadout ticket) which is not necessarily when it was invoiced.

Choose the *Location*. There is no "Company (with location details)" option – Alberta Environment & Parks requires you to export the data separately for each location.

To make it easier to further refine the number of sales results returned, we recommend filtering by:
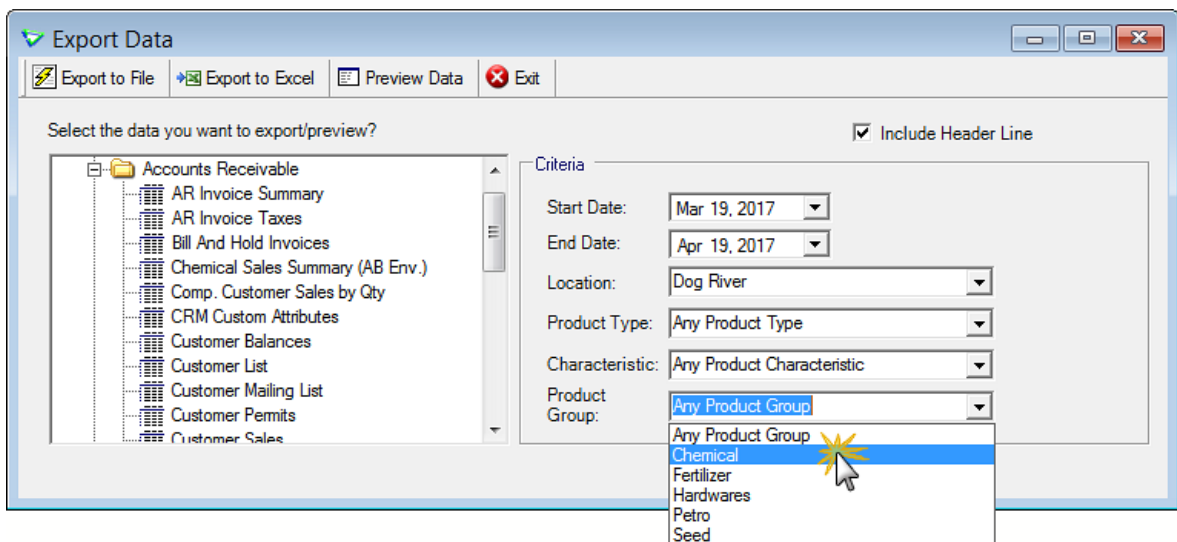
1. ***Any Product Type*** and using a specific ***Product Characteristic*** for just the ones you are required to report on. This will pull relevant sales from multiple product types (herbicides, pesticides, fungicides, chemicals, etc.) into a single export file.



> **Help**    Detailed instructions for tagging characteristics to products can be found in online Help under ***Inventory > Manage > Product Characteristics***.

2. ***Any Product Type***, ***Any Product Characteristic***, and the ***Chemical Product Group***. This will pull sales of *all product*s – including ones you may not be required to report on – from multiple product types (herbicides, pesticides, fungicides, chemicals, etc.) into a single export file.
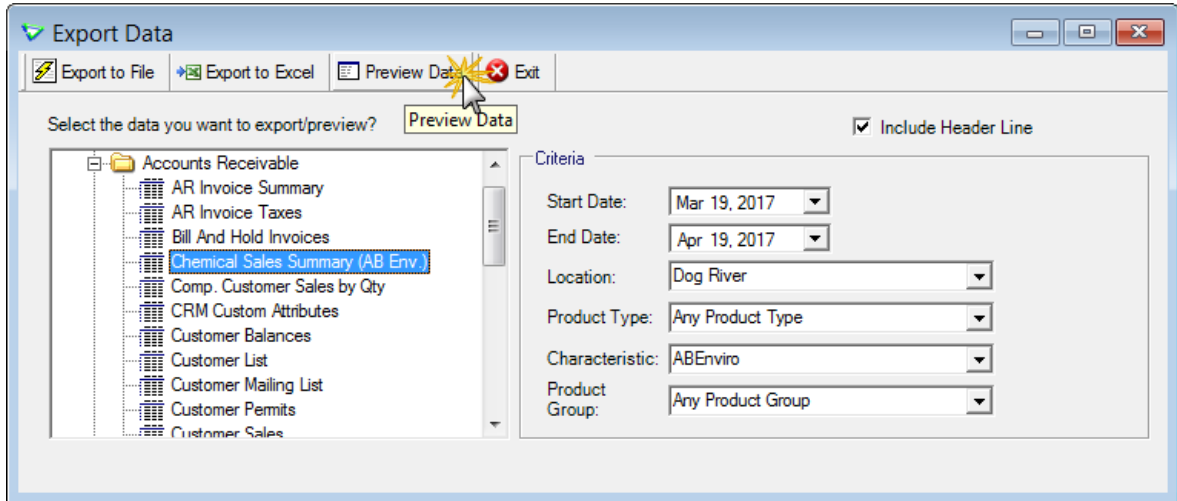


> **Help**    Detailed instructions for including multiple Product Types in a Product Group can be found in online Help under ***Inventory > Manage > Product Groups***.

# Previewing the Results

You can preview the sales that meet the criteria and that will be sent to Alberta Environment & Parks.
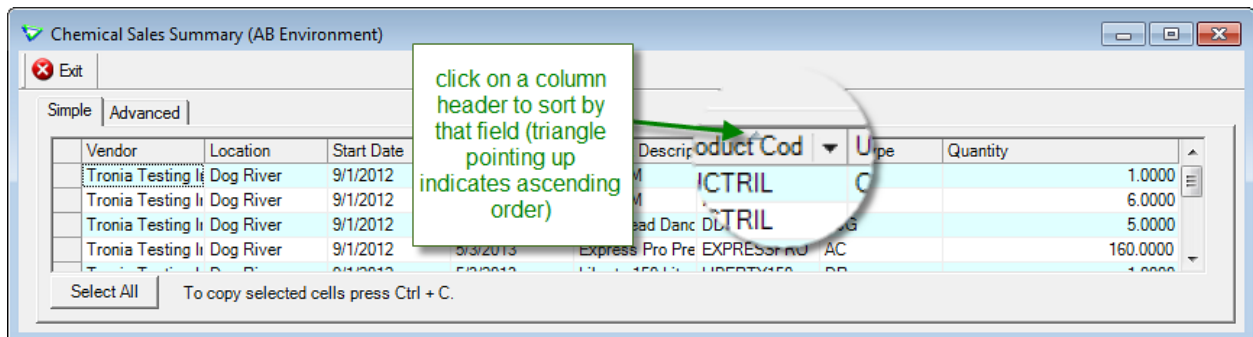
Click *Preview Data* to see the results.



**The export will include the following information:**

- *Vendor*: Retailer making the sale (that's your company)
- *Location*: Physical location the sale was generated from
- *Start Date*: Export data start date
- *End Date*: Export data end date
- *Product Description*: Product description as per what is set up in manage products
- *Product Code*: Product code as per what is set up in manage products
- *Unit Type*: The unit type the product was sold in for that single transaction
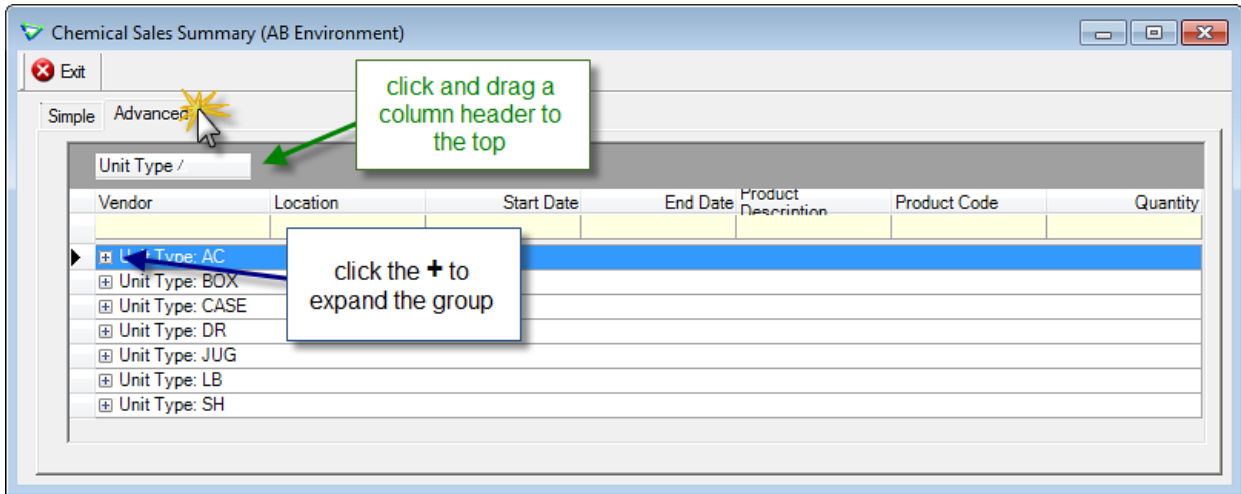- *Quantity*: Total quantity of units sold for that single transaction

## Simple View

The default view is *Simple*. This lists the data in rows and columns very similar to a spreadsheet. The results can be sorted and filtered by clicking on a column header.
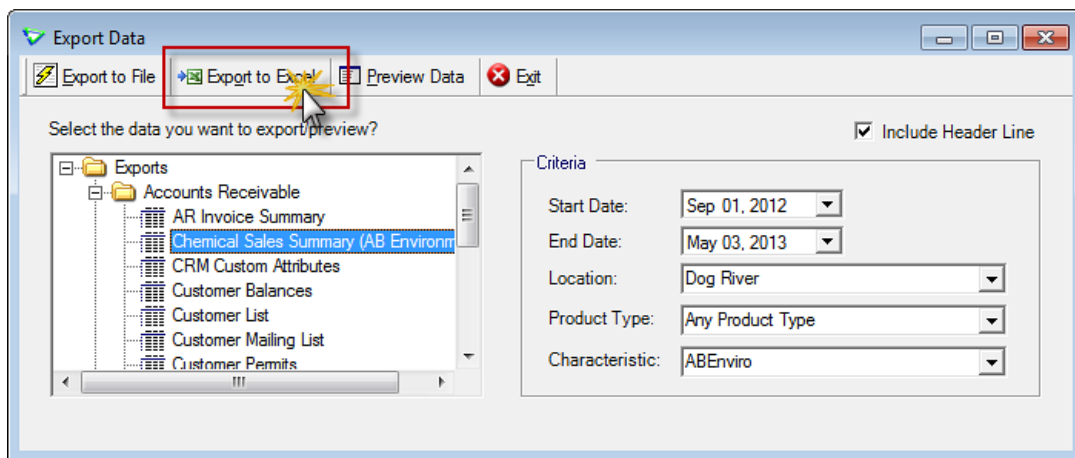
## Advanced View

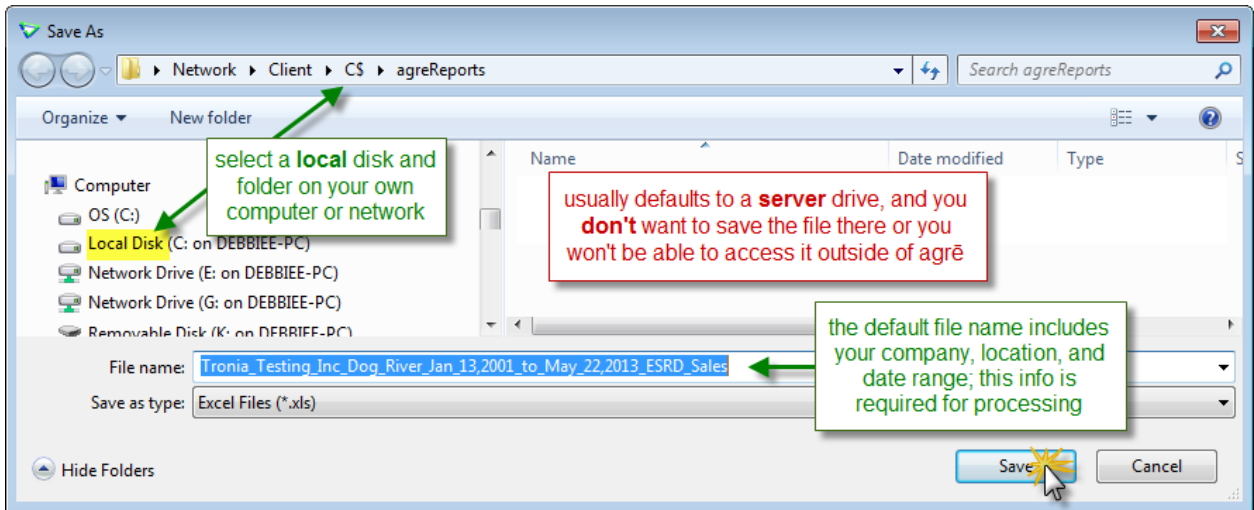One the *Advanced* tab you can group the results as well.



# Exporting the Results

Once you are satisfied that the selection criteria is pulling all the sales you're required to report, you'll need to export the results to a file that can be emailed to Alberta Environment & Parks.

Click *Export to Excel*. It's okay if you don't have Microsoft Excel installed; agrē knows how to format export files that Excel can read even if it's not installed on your computer.
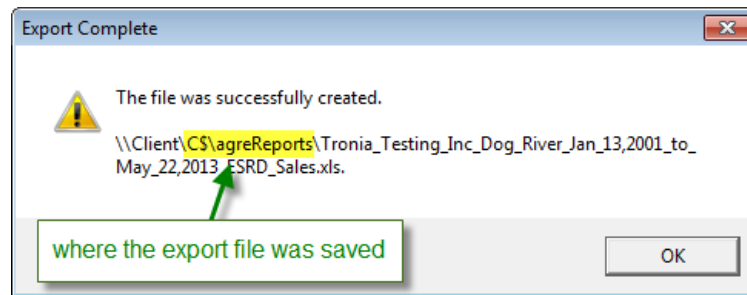
Please **retain the default file name**. Alberta Environment & Parks needs to associate this results file with your company so the file name must include the company name, location, and date range.



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

agrē will display a message that the file was created successfully and remind you of where you chose to save it.

# Submitting the Chemical Sales Export

Alberta Environment & Parks will provide you with an email address in their request for information.

Attach the export file by navigating to the local drive and folder you selected when you exported the data.