Customer Setup from Hub

Whether mapping, blending, or billing, the customer file is essential. Growers (or tenants) as well as landlords are entered into this file. The Customer ID must be a unique.

Hint: When searching for a customer from the selection window, quickly find them by selecting the *Customer Name* heading to sort the list then select the input field and type in the first few characters of their last name.

A user-defined list of Favorite Customers can be set up at *Hub / Setup / Favorite Customers*. When creating transactions or viewing reports, select the *Show Favorites* option on the *Select Customers* window to choose from customers set as favorites.

Profile

- **Customer ID** – Enter a unique ID consisting of up to six characters. The ID is used throughout the Agvance modules to call up or refer to this customer. The first three characters of the last name followed by the first three characters of the first name is a suggestion for the ID format. Another option might be to enter a 1-digit location number followed by 3 characters of the last name and 2 characters of the first name.

  > **Note:** Once saved, the ID cannot be edited. To update an ID, a new customer will need added with the desired ID then the old customer will need to be merged with the new at *Hub / Utilities / Admin Utilities* then *Hub / Combine Customers*.

- **Grower** – Select this box if the customer is considered the primary grower of any fields to be entered into the system.
- **Location** – Select the location where this customer does business.
- **First Name/Last Name** – Enter the first and last name of the customer as it is to appear on documents and reports. If the customer is a business, enter the business name in the *Last Name* field, leaving the **First Name** blank.
- **Address 1/Address 2/Address 3/City/State/Zip** – Enter the address as it is to appear on documents. There are three address lines available in addition to *City/State/Zip* for each customer. The first non-blank address line above *City/State/Zip* is the primary address. For example, if the customer has two address lines, input their mailing address in *Address 2* and their shipping address (or Attention to) in *Address 1*. *Address 3* would not print in this example, as it was left blank.
- **Phone 1/Phone 2** – Enter the primary and secondary phone numbers (optional).
- **Territory/County/Country** – These are optional inputs that may be used as filters in customer queries. Double-click to display the list of counties that correspond with the state chosen. Optionally double-click to choose the country name. If selected, the country name prints along with the address on Labels, Invoice and Statement documents.
- **Notes** – Use this area to enter any special, internal notes about this customer. This does not print on any report or paperwork the customer receives.
- **Quotes** – This area allows recording and/or viewing product quotes and terms specific to a customer file. This area is different than Product Bookings (in Accounting) or Sales Orders (in Planning or Mobile Sales) because a quoted price may be recorded for a product without specifying a quantity or specific field arrangement. These quotes are accessible from several areas in the program where pricing decisions are entered.
- **Inactive** – Check this option if the customer is no longer active. It renders this ID/customer unavailable from most customer selection lists.
  Note: If the Customer is connected to SKY Mapping, the Customer cannot be marked as *Inactive.*
- **Group** – Optionally use this input to help categorize customers.
- **GLN** – Enter the Global Location Number assigned to the customer. This number is required to be 13 digits. Examples of where this may be used include:
  - **Purchase Order** – When the *Use Address and GLN from customer profile* option is checked on the *Ship To* tab of the PO, the GLN value is populated with the GLN entered on the Customer *Profile* tab. If unchecked, the *GLN* on the *Ship To* tab of the PO is used. This GLN value is saved with the Purchase Order.
  - **Purchase Order Request** – Only the GLN entered on the *Ship To* tab is saved. It does not go back to the Customer or Location to pick up a GLN no matter what.
  - **Manage Agvance Import** – The GLN is loaded from the Customer import file at *Admin Utilities / Hub / Agvance Import* on the *Import* tab and is saved to the Grower tables.

- **Meppel Export** – The GLN is a part of the export functionality.
- **Export to EZTrack** – The GLN is a part of the data export functionality.
- **Preferred Language** – Select either English or French as the customer's preferred language.
- **Pricing** – Set the price level to default for this customer at the Agvance Planning, Blending, and Accounting programs. These price level headings are set at *Setup / Inventory Departments* on the *Price Levels* tab.
- **Dept. Overrides** – Optionally select to setup price level defaults for this customer based on Inventory Departments.
- **Salesperson** – Optionally assign this customer a specific salesperson. Choose the arrow to select from the list of sales staff set up at the *Setup / Sales Staff* window.
- **Sales. Override** – Selecting **Sales. Overrides** opens the *Department Salesperson Overrides* window listing all departments with the Salesperson selected in the *Salesperson* field defaulted for every department. An alternate Salesperson can be selected for each department from the drop-down. For more information on multiple salespeople in Agvance, see here.
- **Map** – Selecting this allows viewing a map of the customer address. The *Latitude* and *Longitude* boxes are populated once the address is geocoded for the map to display.
- **Attachments** – Files may optionally be attached to a customer file. Attachment names are validated to prevent invalid characters.
- **Classifications**– Select this option to select one or more classifications for the customer. Once established, these classifications are useful as filtering or selection tools. For example, use them to generate sets of mailing labels to targeted price lists. Classifications are setup at *Setup / Company Preferences* on the *Customer* tab.
- **Attributes** – Select this to choose attributes for the customer. Attributes are set up at *Setup / Company Preferences* on the *Customer* tab.
- **Active Patron** – Check if this customer is an active patron for the Patronage module.
- **Note:** *Active Patron*, *Birth Date*, and *SSN/Tax ID* must be filled out for the customer to receive patronage.
- **Birth Date** – Enter the customer's birthday. This is a required field if the customer is a patron.
- **SSN/Tax ID** – Optionally enter the social security number or federal ID number of this customer. Customers with patronage activity must have a valid number in this field. Enter numbers with dashes. This is a required field if the customer is a patron.
- **Customer ID Cross Reference** – There are four optional inputs that may help identify this customer to other computer systems or numbering schemes. The headings for these miscellaneous inputs are set at *Setup / Company Preferences* on the *Customer* tab.
- **Link Agrian Grower** – When linking customers between Agrian and Agvance, enter the Agrian ID here. The Agrian Grower *Permit #* is available for reference on the *Select Agrian Grower* window.
- **Refresh** – Selecting this option refreshes the customer's state permit information through the Agrian webservice.

- **Federal Permits** – This feature allows the customer's Federal Permit numbers to be specified along with the permit number expiration date. The permit numbers print on the Invoice document when restricted products are sold.

  Note: Be sure to remove any spaces at the beginning of a Customer's federal permit to ensure Delivery Tickets and Invoices save as expected.

- **Arrow Icons** – Located in the lower left corner of the screen, these allow quick navigation through customer records when viewing or editing information. The arrows on either end jump to the first or last record in the group.

- **Influences** – Influences link this customer to other customers by Business Influence Types established in the Accounting module.

  - **View Change Log** – This log lists any changes to the customer business influences, including the type, date and time of the change, whether it was added or deleted, as well as the user ID who made the change.

- **Tech Lic #s** – This allows adding or deleting a technology license number for the customer. This feature specifies the technology group or groups associated with the license number. The license number optionally prints on customer documents. For Technology Groups marked as *Veterinary Feed Directives*, entering an *Effective Date* and *Expiration Date* is required.

- **State Permits** – This optional feature is provided for those states (such as California) that require a valid permit number for the sale of specific state restricted products. This feature allows specifying the products associated with a given permit number and enter that permit number's expiration date. The permit numbers print on the Invoice document when these products are sold.

- **Contacts** – Optionally add addresses and email information for various people associated with the customer. Authorized Agents for the customer account and relationship to the account may also be established here. Information typed in the *Contact Type* or *Relationship* columns is available to select later.

  Note: Enter the customer's primary email address in the first row as future enhancements may use that address for special functions.

- **Addresses** – This area allows adding multiple *Ship To* and/or *Bill To* addresses for the customer. The *Name* line

is typically used for the name of the individual or company being billed or the shipping location. In addition to the address, city, state, and zip of the *Bill To/Ship To*, each of these addresses may be assigned its own salesperson designation and sales tax rate. If there are customers who may be charged multiple tax rates because their fields are in more than one county, set up additional *Ship To* addresses for each county with a distinct tax rate.

- A single *Email Address* can be added. If utilizing email capabilities in Agvance, indicate how to handle the email - *Email Staged* or *Email Direct*. When the full *Mail Host information* and the *API Database ID* are populated and an email is entered on a Ship To selected for an Invoice, the email will be included in the list of those receiving the email of this transaction. This allows Growers who have individuals responsible at each Ship To for billing to have separate setups and not have to include all of their billing managers on every Invoice being sent to the Grower.

- Selecting **Sales. Overrides** opens the *Department Salesperson Overrides* window listing all departments with the Salesperson selected in the *Salesperson ID* field defaulted for every department. An alternate Salesperson can be selected for each department from the drop-down. For more information on multiple salespeople in Agvance, see here.
- After being added to a customer file, *Bill To* addresses may be used on a Delivery Ticket, Blend Ticket, or Invoice. *Ship To* addresses may be selected under the *Additional Info* option when adding a Blend Ticket, or on the *Additional Info* tab when adding a Delivery Ticket, or Invoice. *Ship To* addresses only print on the Invoice or Delivery Ticket if the *Bill To/Ship To* style is selected for those documents in the *Setup / Location Preferences* area of the Accounting module.

100% to Grower

The *Grower* designation on the *Profile* tab found at *File / Open / Customer* has a significant impact on some of the A/R and Inventory reports. It is important that the *Grower* status of the customers is maintained in order for these reports to be accurate.

On some Accounts Receivable and Inventory reports, there is a *100% to Grower* option. This causes the subtotaling of product to go to only the growers on the Invoice and disregards the landlords. In the case where there are multiple growers on one Invoice, the total Invoice is split among the growers according to the percentage relationship that is present.

Example: If a father and son farm together for a landlord in a 40/10/50 arrangement (where the father is 40, the son is 10, and the landlord is 50), then an Invoice for this arrangement when run *100% to Grower* would be split 80/20 between the father and son. The landlord would not be listed on the report for this Invoice.

Important Note: On all Invoice reporting except the Sales Analysis report where the *100% to Grower* option is available, the absence of a grower on the Invoice causes the Invoice to be skipped. On the Sales Analysis report, the absence of a grower causes the first customer in the divide to be considered the grower.
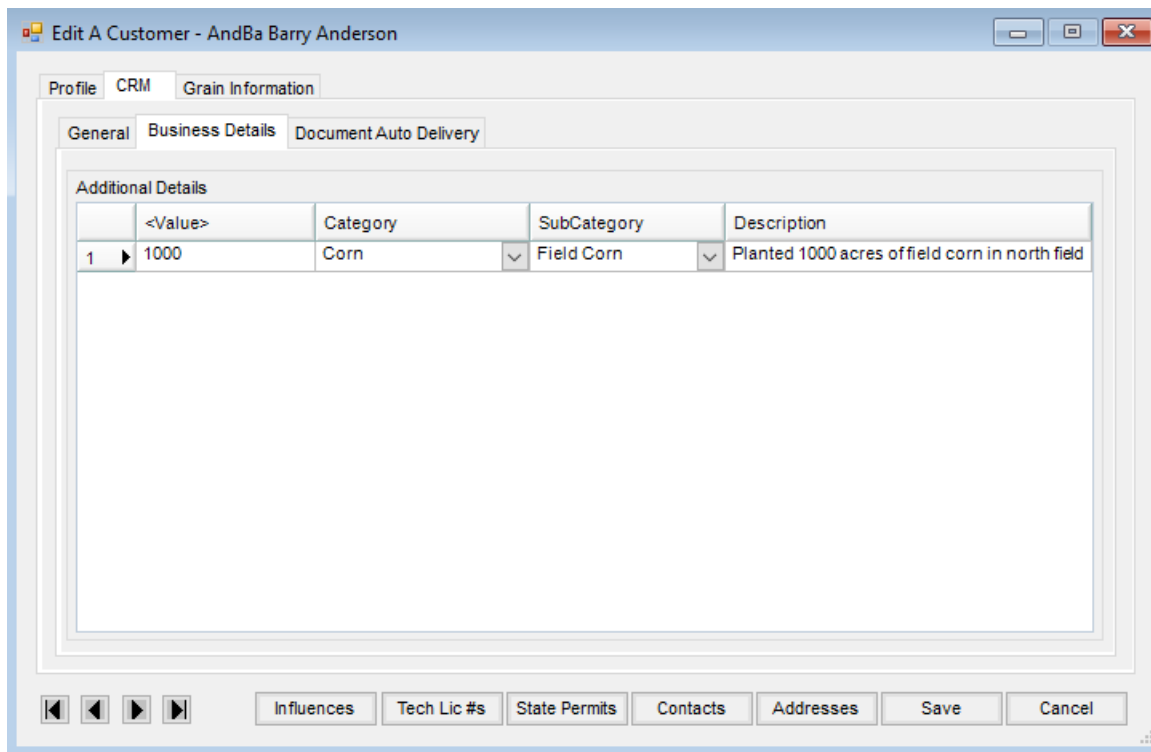
CRM

General

- **Customer Relationships** – Add any members of a family/work relationship with the customer.
- **Significant Dates** – Add dates and a description of those dates here. This could be used to record important customer dates such as anniversaries, birthdays, etc.
- **Prospect** – Check this option to designate a customer as a *Prospect*.

Business Details

- **Additional Details** – This grid allows entering and tracking the types of work the customer is involved in and to what extent. Double-click on *<Value>* to add a row. For example, if a customer had 1000 acres of field corn planted, then the *value* = 1000, *category* = Corn, *subcategory* = Field Corn, *description* = Mr. Smith planted 1000 acres of field corn in the north field.

Document Auto Delivery Tab
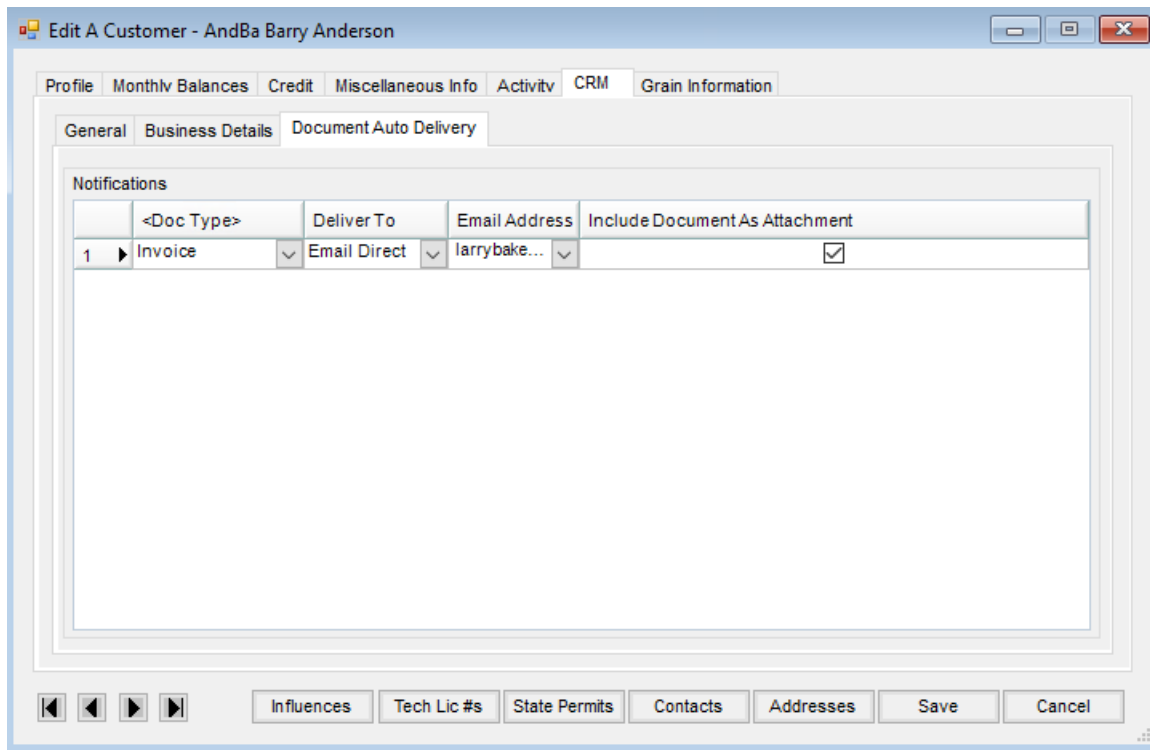
- **Notifications** – Double-click on *<Doc Type>* to select the type of document to send, how to send, and the email address to use for sending the document. For example, choose to send a Booking directly through email to the customer. Check *Include Document As Attachment* to include transactions as PDFs rather than only a link.

  Note: The *Include Document As Attachment* option is currently only available for Invoices, A/R Statements, and Budget Billing Statements.

Grain Information

- **Grain Tax Exempt** – Grain customers may be marked as exempt from grain assessments.
- **1099 Amount**
  - **1099 Type** – If the customer is to get an interest 1099 for patronage, select *Interest* as the 1099 type.
  - **1099 Amt Paid To Date** – The amount of the interest paid through the patronage module displays in this area.
- **Pay to ACH Account Information**
  - **ACH Routing #** – Used when paying the customer by direct deposit, enter the customer's bank routing number.
  - **Bank Account #** – For direct deposit grain payments, enter the customer's bank account number.
  - **Account Type** – Define if the account being used for direct deposit is a checking or a savings account.
  - **ACH Type** – This option is enabled when using an *ACH File Type* of *Standard*. Grain ACH files created at *Accounting / A/R / Process Grain ACH* will identify Growers as consumer (*PPD*) or corporate (*CCD*) accounts and the ACH Type will be added to the report generated. From the drop-down, assign which type applies to the Customer (*PPD* or *CCD*).
- **Condo / Leased Storage**
  - **Customer Leased Units** – The number of units a customer has for condo/leased storage displays here.
  - **Customer Associate Grower** – If sharing another customer's leased storage, select the customer where the units are stored.

- **Scale Interface Non-Contract DPR Override** – Set the Non-Contract DPR to be used when getting a contract overfill.

  Note: Assembly overrides are checked first, then customer, and finally the company global setting.

- **MN Lien Holder ID** – If applicable, enter the Minnesota Lien Holder ID in this area. This number is used when grain settlement checks are written as a comparison against liens on file with the Minnesota Secretary of State.

- **Authorized to use Grain Bank** – Include the customer names who are authorized to use from this customer's grain bank account.