

Send PDF Files to Grower360

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PDF files of transactions created in Agvance can be shared with growers through Grower360. While most documents are sent automatically, Settlement Documents require the setup described below.

The *API Database ID* must be entered in Agvance at *Hub / Setup / Company Preferences / General*.

Documents prior to the *API Database ID* being stored will not show up as a PDF in Grower360 unless the transaction/document is manually opened and resaved.

If this field is blank, contact support@agvance.net to ensure this area is populated with the correct information.

The screenshot shows the 'General' tab of the Agvance settings window. The 'Web API Database Connection Information' section is highlighted with an orange box. It contains the following fields and buttons:

- API Database ID**: A text input field.
- Contact SSI Support to complete your setup**: A blue hyperlink.
- Set Database ID**: A button.
- Activate Mobile Sales**: A button.

Other visible fields in the 'General' tab include:

- ☐ Login Using Windows User
- ☐ Use ThinPrint Printer Driver
- ☐ Allow users to login from multiple machines
- Mail Host**: A section containing:
 - Mail Host**: **Port**: ☒ Use SSL
 - If no Mail Host Port is specified, default port 25 will be used.
 - Mail Host Email**:
 - Address**:
 - Password**:
 - Mail Host and Port must be filled out if using Mail Host Email
- Default timeout for email link (# of days)**:

Customer Setup

Most documents will be sent to Grower360 automatically upon saving after the setup above is complete. However, if customers need to view Grain Settlement Documents as a PDF, the following setup will need to be completed.

1. At *Hub / File / Customers* select a customer to receive the Settlement Documents in Grower360 and **Edit**. On the *CRM* tab select the *Document Auto Delivery* tab and double-click the column heading to add a row.
2. Select the drop-down arrow on the newly created row and choose *Settlement Document*.
3. Set the *Deliver To* column as *MFR* for all document types.
4. Do **NOT** enter an email address.

The screenshot shows the 'Edit A Customer - AndBa Barry Anderson' window. The 'CRM' tab is selected, and the 'Document Auto Delivery' sub-tab is active. The 'Notifications' section contains a table with the following data:

	<Doc Type>	Deliver To	Email Address	Include Document As Attachment
1	Settlement Document	MFR		<input type="checkbox"/>

Settlements

Upon saving the Settlement, check the *Email This* option on the *Print Settlement Information* window that appears.

Print Settlement Information

Settlement1Location00MAIN# Copies

SettlementSettlement CheckSettlement ContractsAssembly Sheet

☐ Print Settlement

☒ Print Comments

☐ Print Settlement Deduction Unit Prices

☒ Include in header

☐ Print Settlement Source Contract

☐ Print Location

☒ Print Company

☒ Print Drying Charges

☐ Print Assembly Detail

☒ Print Assembly Comments

☒ Print Scale Ticket Comments

☒ Print Assembly Overall Grade Factors

☐ Suppress Zero Value Grade Factors

☐ Print In Condensed Mode

☒ Print Drying Charges

☐ Print Drying Charges Per Unit

☒ Print Bin Ref.

☒ Print All Customers

☐ Print Freight Vendor and Rate

☐ Suppress prices only when settling to unpriced

☐ Suppress prices

☐ Print Deductions and Storage/Service Charges

☒ Email This

Show Email Addresses

OK

Cancel

Statements

At *Accounting / Accounting Reports / Accounts Receivable / A/R Status*, indicate the *Month* and *Year* of Statements to be sent to Grower360. Optionally check *Missing Only* to avoid exporting duplicate Statements. Choose **Export**. Statements will display in Grower360.

A/R Status Reports

Customer Balances
Payment Register
Statements
Combo Statement
Customer Change Log
Cash Receipts Projection
Volume Statement
Customer Credits
Card Activity
Driver/Salesperson Aging

Select Locations
All Select

☐ Print
☒ Preview
☐ Text File
☐ PDF File

File Name

Load Set Save Set

OK Cancel

Print Job Size
All

Send Statements to Grower360

Month

Year

☐ Missing Only

Export