Send PDF Files to Grower360

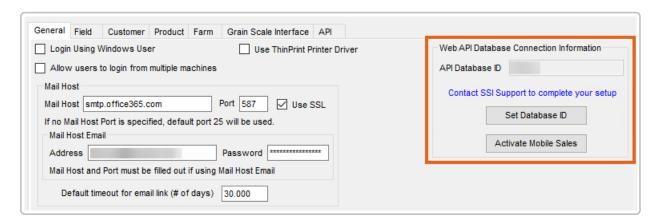
Last Modified on 03/21/2024 7:25 am CDT

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.

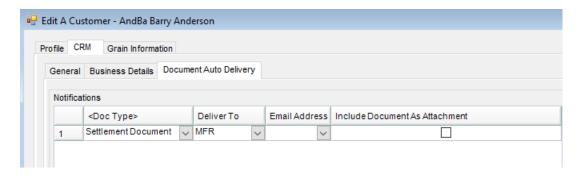
If this field is blank, contact support@agvance.net to ensure this area is populated with the correct information.



Customer Setup

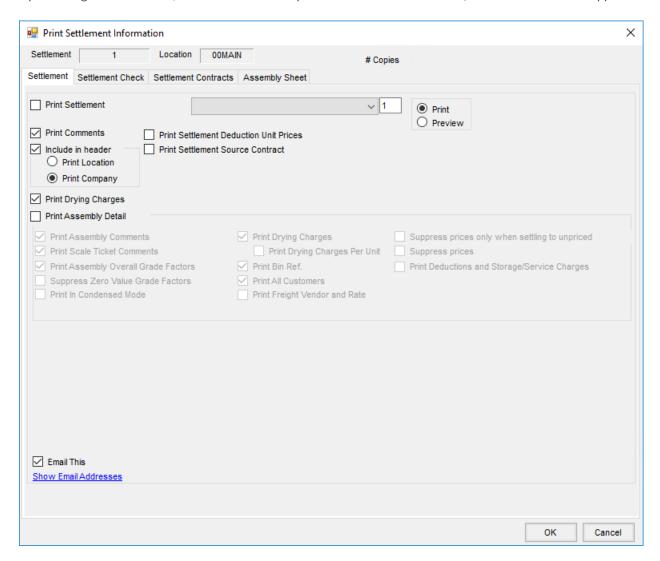
Most documents will be sent to Grower360 automatically upon saving after the setup above is complete. However, if customers need to view Grain Settlement Documents as a PDF, the following setup will need to be completed.

- 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.



Settlements

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



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.

