

# Federal and State Permits In Agvance

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Federal Permits in Agvance are designed to help with the regulation and sale of Restricted Use Products to customers as defined by the EPA. Each state manages their own certified pesticide applicator licenses. In the majority of the states/cases, state issued licenses will be set up in the Agvance Federal Permit area.

State Permits in Agvance, also known as County Permits, provide help with the regulation and sale of 'Restricted Use Products', but also provide for the regulation and sale of products that are additionally restricted by certain states beyond the federal requirements. California is a prime example of this.

## Setup

### Federal

Federal Permits can be set up at the *Edit A Customer* screen. In the *Federal Permits* grid, enter the permit and the expiration date, and click **Save**. It is recommended to start with the name of the permit holder preceding the permit number so it is easily identifiable when printing on transactions.

**Note:** For customers in Minnesota and Michigan, Federal and/or State Permits will need to be denoted with a pipe symbol separating the permit holder's name and the permit number such as 'Permit Name | Permit #####'. This allows the information on the MN and MI Restricted Use Pesticide report in Agvance to be formatted correctly. Customers outside of Minnesota and Michigan may also format their permit numbers in this way if they choose to utilize the *Include All States* option on the MN or MI report.

	Federal Permits	Exp.Date
1	▶ Bob Cowgill   P20897	03/01/2015
2		

### State

To set up a State permit for a customer in Agvance, edit the selected customer. At the bottom of the *Edit A Customer* screen, click the **State Permits** button.

On the *Customer Permits* screen, choose the product(s) to which the permit applies, enter a Permit number and expiration date, and click **Save**. A State Permit is added for the customer.

To edit the expiration date for the State Permit on the *Customer Permits* window, select *Edit Date* and change the date in the *Expire Date* field. Select **Save**.

## Warnings

On the *Hub / Setup / Company Preferences / Customer* tab, set the *Method to Check Sale of Restricted Products* dropdown menu to *Don't Check*, *Warn Only*, or *Disallow*. If *Don't Check* is set, all sales of restricted products (both Federal and State restricted) will be allowed. When set to *Warn Only*, a dialog box will appear when the sale of a restricted product is attempted that allows the user to continue with the sale with no valid permit or go back to the

transaction to add a valid permit or remove the restricted products from sale. If set to *Disallow*, the transaction will not be saved without selecting an unexpired permit.

On the same *Customer* tab, the *Source of Customer Permit Checking* can be set to *Federal*, *State*, or *Both*. When set to *Federal*, Agvance will verify a Federal Permit is being used when saving a transaction, by looking for a Permit number and expiration date for both Federal and State restricted products.

When set to *State*, Agvance will confirm a valid State Permit is set up for products that are Federal or State restricted. The State Permit must also have an unexpired expiration date.

When set to *Both*, Agvance will check that a Federal Permit/unexpired date exists for Federal restricted products, as well as ensure that a State Permit/unexpired date for the products being sold exists.

**Note:** When checking for State restricted products, Agvance first looks for this state at the Field record, then the Ship To record, followed by the Grower’s Account, and finally the Location. Assuming the *Method to Check Sale of Restricted Products* preference is set to *Warn Only* or *Disallow*, if the program finds a state set at the field level with the proper permits in place, the sale will be allowed. If no state exists on the field level, it will look to the Ship To on the grower’s account. If no state is set at this point, it will look to the grower’s account, and if none is found, it will go to the location level. Again, if nothing is found after looking to the location, it will stop the sale.

## Permit Guidelines

The following pages contain examples of the Permit Warning messages. Please contact Software Solutions Integrated, LLC with any questions.

### Source of Customer Permit Checking: Set to Check ‘Federal’

The guidelines below refer to when *Federal* is selected from the *Source of Customer Permit Checking* drop-down menu option on the *Preferences* screen. The charts assume one Unexpired State Permit and/or one Unexpired Federal Permit is being used. The examples shown on the following page refer to the charts below. This scenario most commonly refers to users outside of California.

**Note:** When referencing ‘No Permits’, this indicates either a permit does not exist, a Permit exists with an expired date, or there is more than one unexpired permit. In this case, ‘no permits’ is referencing Federal permits because the *Source of Customer Permit Checking* is set to check *Federal*.

Customer with No Permits				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	Example 1	Example 2	Example 3	No Warning

Customer with Unexpired Federal Permit and No State Permit				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No

Customer with Unexpired Federal Permit and No State Permit				
	No Warning	No Warning	No Warning	No Warning
Customer with Unexpired State Permit and No Federal Permit				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	Example 1	Example 2	Example 3	No Warning
Customer with Unexpired Federal Permit and Unexpired State Permit				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	No Warning	No Warning	No Warning	No Warning

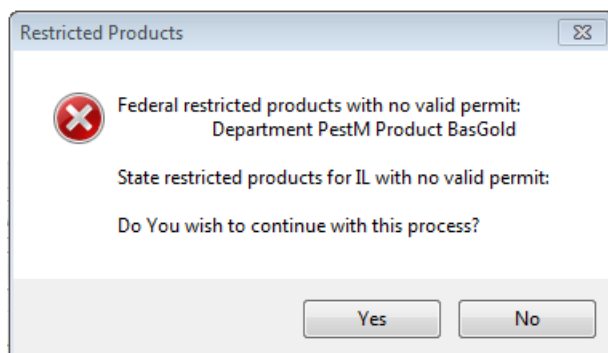
**Note:** If only one unexpired permit exists for a grower account, Agvance will default to that permit on the transaction. If more than one unexpired permit exists, the user will need to select on which permit the product(s) are being sold. If no permit is selected, Agvance will display the warning dialog box upon trying to save the transaction when the preference is set to *Disallow* or *Warn Only*.

### Source of Customer Permit Checking: Set to Check 'Federal'

Note: When referencing 'no permits', this indicates either a permit does not exist, a Permit exists with an expired date, or there is more than one unexpired permit. In this case, 'no permits' is referencing Federal permits because the *Source of Customer Permit Checking* is set to check *Federal*.

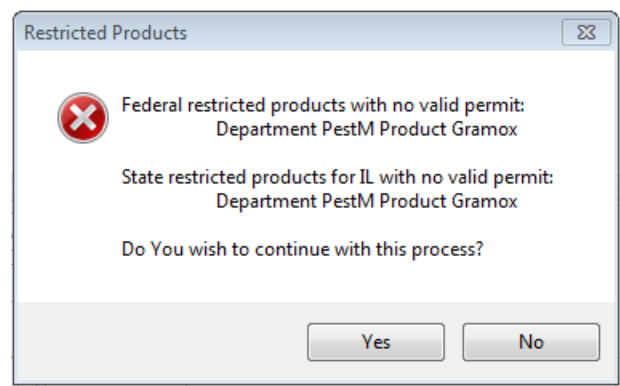
#### Example 1

This appears when a customer attempts the sale of a Federal restricted product with 'no permits'.



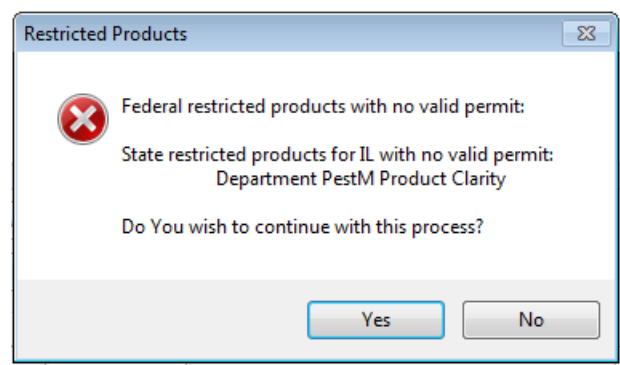
Example 2

This appears when a customer attempts the sale of a Federal restricted and State restricted product with ‘no permits’.



Example 3

This appears when a customer attempts the sale of a State restricted product with ‘no permits’.



Source of Customer Permit Checking: Set to Check ‘Both’

The guidelines below refer to when *Both* is selected from the *Source of Customer Permit Checking* drop down menu option on the *Preferences* screen. The charts assume one Unexpired State Permit and/or one Unexpired Federal Permit is being used. The examples shown on the following page refer to the charts below. This scenario most commonly refers to California users.

**Note:** When referencing ‘No Permits’, this indicates either a permit does not exist, a Permit exists with an expired date, or there is more than one unexpired permit. In this case, ‘no permits’ is referencing Federal and/or State permits because the *Source of Customer Permit Checking* is set to check *Both*.

Customer with No Permits				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	Example 4	Example 5	Example 6	No Warning

<b>Customer with Unexpired Federal Permit and No State Permit</b>				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	No Warning	Example 6	Example 6	No Warning
<b>Customer with Unexpired State Permit and No Federal Permit</b>				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	Example 4	Example 4	No Warning	No Warning
<b>Customer with Unexpired Federal Permit and Unexpired State Permit</b>				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	No Warning	No Warning	No Warning	No Warning

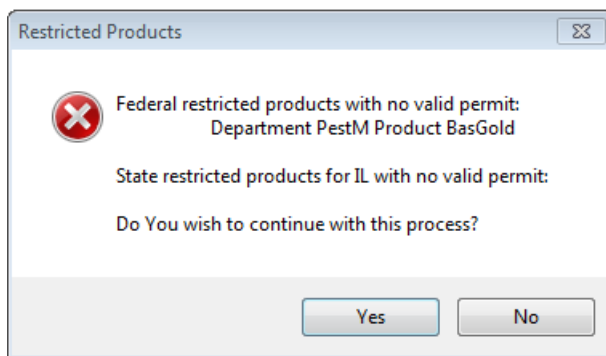
**Note:** If only one unexpired permit exists for a grower account, Agvance will default to that permit on the transaction. If more than one unexpired permit exists, the user will need to select on which permit the product(s) are being sold. If no permit is selected, Agvance will stop the sale when the preference is set to *Disallow* or *Warn Only*.

#### Source of Customer Permit Checking: Set to Check 'Both'

**Note:** When referencing 'no permits', this indicates either a permit does not exist, a permit exists with an expired date, or there is more than one unexpired permit. In this case, 'no permits' is referencing Federal and/or State permits because the *Source of Customer Permit Checking* is set to check *Both*. This scenario assumes the *All Products* checkbox is selected on the *Customer* account.

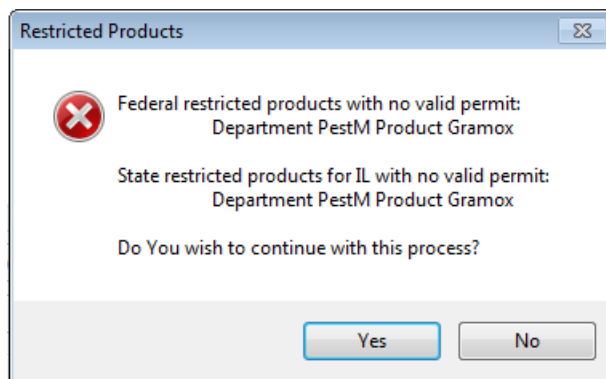
#### Example 4

This appears when a customer attempts the sale of a Federal restricted product with 'no permits'. In this case, 'no permits' indicates Federal permits.



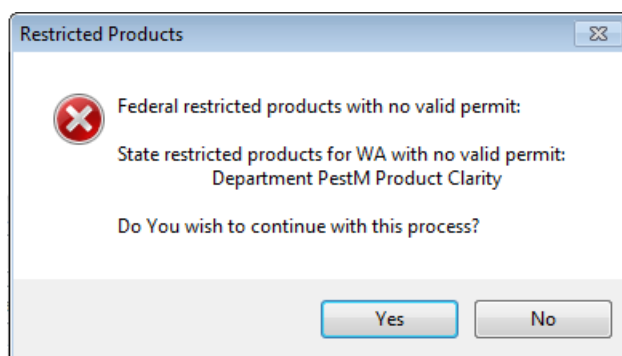
#### Example 5

This appears when a customer attempts the sale of a Federal restricted and State restricted product with 'no permits'. In this scenario, 'no permits' indicates Federal and State permits.



#### Example 6

This appears when a customer attempts the sale of a State restricted product with 'no permits'. In this case, 'no permits' indicates State permits.



#### Source of Customer Permit Checking: Set to Check 'State'

The guidelines below refer to when *State* is selected from the *Source of Customer Permit Checking* drop-down menu option on the *Preferences* screen. The charts assume one Unexpired State Permit and/or one Unexpired Federal Permit is being used. The examples shown on the following page refer to the charts below.

**Note:** When referencing 'No Permits', this indicates either a permit does not exist, a Permit exists with an expired

date, or there is more than one unexpired permit. In this case, 'no permits' is referencing State permits because the *Source of Customer Permit Checking* is set to check *State*. This scenario assumes the *All Products* checkbox is selected on the *Customer* account.

<b>Customer with No Permits</b>				
Federal Restricted Product	Yes	Yes	No	No
State Restricted Product	No	Yes	Yes	No
	Example 7	Example 8	Example 9	No Warning

<b>Customer with Unexpired Federal Permit and No State Permit</b>					
Federal Restricted Product		Yes	Yes	No	No
State Restricted Product		No	Yes	Yes	No
		Example 7	Example 8	Example 9	No Warning
<b>Customer with Unexpired State Permit and No Federal Permit</b>					
Federal Restricted Product		Yes	Yes	No	No
State Restricted Product		No	Yes	Yes	No
		No Warning	No Warning	No Warning	No Warning
<b>Customer with Unexpired Federal Permit and Unexpired State Permit</b>					
Federal Restricted Product		Yes	Yes	No	No
State Restricted Product		No	Yes	Yes	No
		No Warning	No Warning	No Warning	No Warning

**Note:** If only one unexpired permit exists for a grower account, Agvance will default to that permit on the transaction. If more than one unexpired permit exists, the user will need to select on which permit the product(s) are being sold. If no permit is selected, Agvance will stop the sale when the preference is set to *DisAllow* or *Warn Only*.

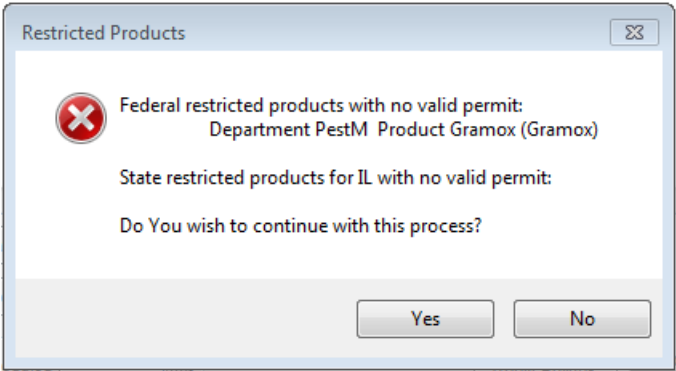
#### Source of Customer Permit Checking: Set to Check 'State'

**Note:** When referencing 'No Permits', this indicates either a permit does not exist, a Permit exists with an expired date, or there is more than one unexpired permit. In this case, 'no permits' is referencing State permits because the *Source of Customer Permit Checking* is set to check *State*. This scenario assumes the *All Products* checkbox is selected on the *Customer* account.

#### Example 7

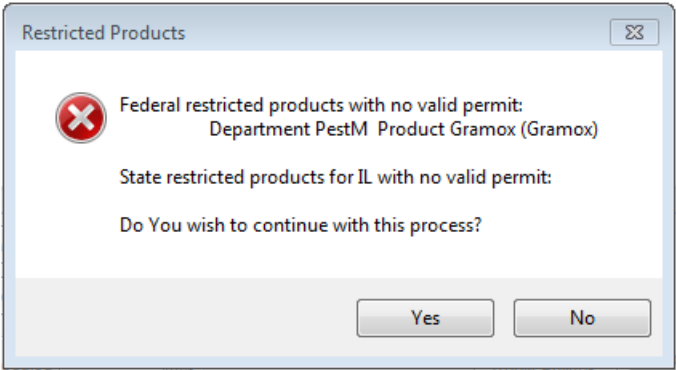


This appears when a customer attempts the sale of a Federal restricted product with 'no permits'.



Example 8

This appears when a customer attempts the sale of a Federal restricted and State restricted product with 'no permits'.



Example 9

This appears when a customer attempts the sale of a State restricted product with 'no permit'.

