

Send Statements to Grower360

Last Modified on 08/19/2024 3:35 pm CDT

Statements and Combo Statements may be sent to a Grower360 library from either live data or a play database. CRM or Grower360 is not required to send statements to the Grower360 library. By performing the necessary setup to send statements to this library, when implementing Grower360, these documents will be available to Growers as historical documents.

The process to send statements to Grower360 may take a significant amount of time. It is recommended to run this process after-hours or from a system that will not be used while processing the statements.

Live Data Setup

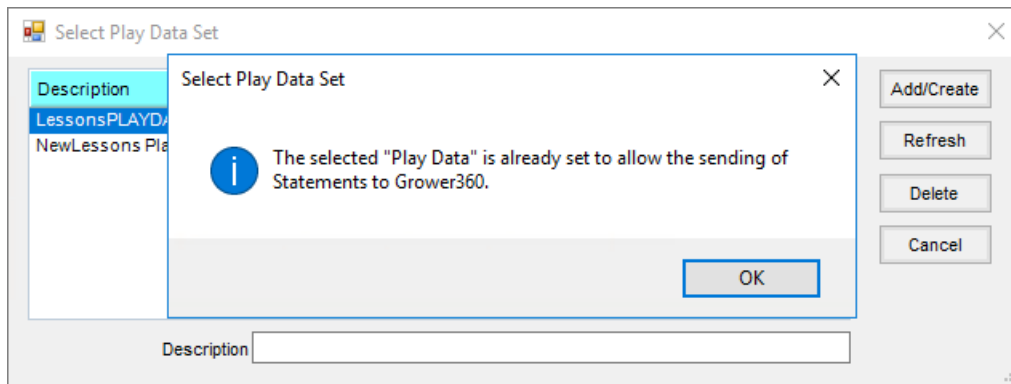
The *API Database ID* must be entered in Agvance at *Hub / Setup / Company Preferences*. If this field is blank, contact support@agvance.net to ensure this area is populated with the correct information.

The screenshot shows the 'API' tab in the 'Company Preferences' section. The 'Web API Database Connection Information' section is highlighted with a red box. It contains an 'API Database ID' field, a link to 'Contact SSI Support to complete your setup', and buttons for 'Set Database ID' and 'Activate Mobile Sales'. Other visible fields include 'Mail Host' (smtp.office365.com), 'Port' (587), 'Use SSL' (checked), 'Mail Host Email' (Address and Password fields), and 'Default timeout for email link (# of days)' (30.000).

Play Database Setup

Create a play database and select the option *Database will be used to send Statements to Grower360*. This establishes the connection between the live data and play data.

If a play database already exists, the link may be established by holding **Shift** and right-clicking the **Refresh** button at *Hub / Utilities / Create/Refresh Play Data*. A message will display indicating the link has been established and the play data may be used for sending statements to Grower360.



After receiving the message, select **Refresh** to finalize the connection and allow the statements to be sent from Accounting Reports.

Processing Statements

1. Statements can be processed from the either the live database or the play database.
 - If using live data, continue to Step 2.
 - If using play data to process statements, select the database from the drop-down in the upper-right corner of the *Hub*.



2. Navigate to *Accounting Reports / Accounts Receivable / A/R Status*, and select *Statements* or *Combo Statements* from the list of reports.
3. Set the desired *Report Criteria*, *Message*, or *Print Options*, or load a *Save Set*.
4. When statements are ready to be sent to the Grower360 library, select the *Month* and *Year* in the *Send Statements to Grower360* section.
5. Select **Export**.

