CRM Manual

Last Modified on 01/05/2026 11:59 am CST

The Agvance CRM Module is designed as a business tool used to generate a complete Customer profile and to track activity of sales staff and others who communicate with Customers. In addition, the CRM module facilitates the electronic delivery of Agvance documents via automatic email, staged email, and delivery to Grower360. Information regarding emailing via a bulk email service can be found here.

The major components of Agvance CRM are:

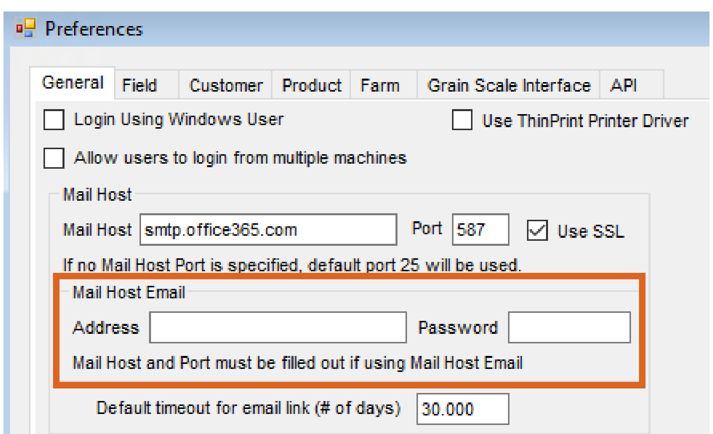
1. Electronic Document Delivery
2. Customer Activity View
3. CRM Communication Journal
4. Customer Gap Analysis Report

CRM - Customer Business Details and General

Specific details about a Customer's total business profile and general information about the Customer can be entered in the Customer file. This area is free-form, allowing specified Users to set up Categories and Sub-Categories and then assign those categories a value to define the size of the Customer's business potential. The setting controlling this Category and Sub-Category setup is the *Allow CRM Category / SubCategory edits* option found by editing a User at *Hub / Setup / Users* on the *General Restrictions* tab. This information can be used for filtering on Customer reports.

No Mail Host Email Set Up

Follow this tab for CRM functionality if the *Mail Host Email* is not set up.



Electronic Document Delivery

One of the major functions of CRM allows for documents to be delivered by *Email Direct*, *Email Staged*, or to Grower360. The following document types are available for delivery:

Functionality may differ based on setup as shown above.

- Bud. Bill. Statement
- Invoice
- Statements (Regular and Combo)

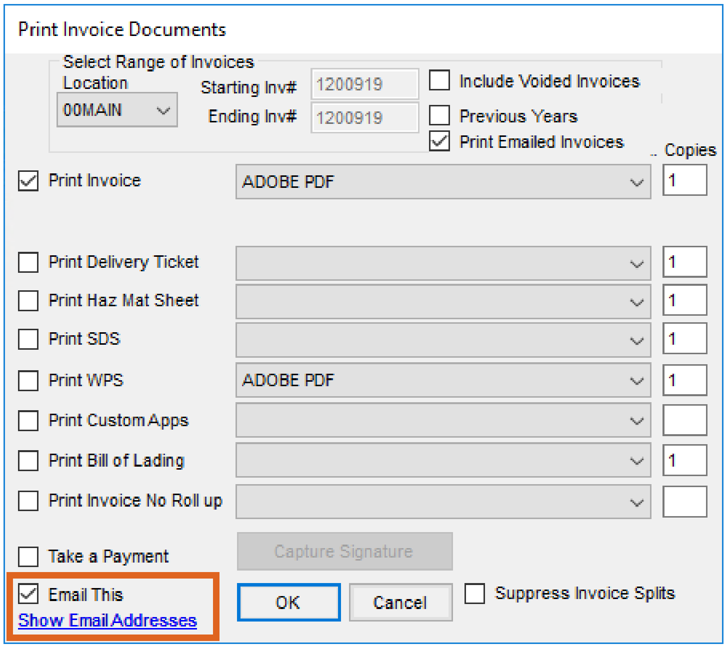
Functionality remains the same regardless of setup.

- Agrian Rec Delivery Ticket
- Blend Ticket
- Booking
- Booking Contract
- Custom App Blend Ticket
- Delivery Ticket
- Field Plan
- Grain Balance Detail
- Payment Receipt
- Purchase Contract
- Purchase Offer Contract
- Sales Order
- Settlement Document
- WPS

Delivery Method (Deliver To)

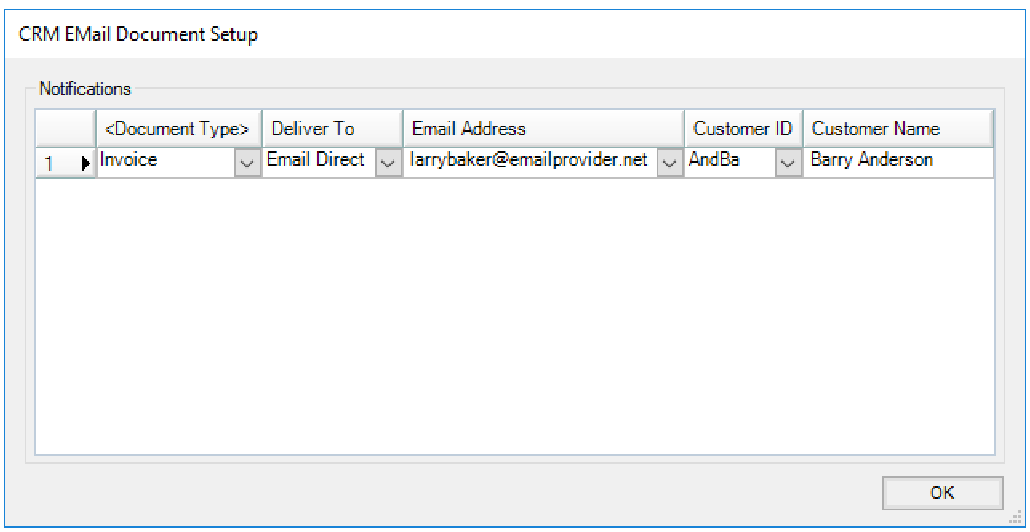
Email Direct

For documents set with a *Deliver To* of *Email Direct*, an email is automatically generated upon selecting **OK** at the *Print Invoice Documents* window and the *Email This* checkbox is selected. The email does not go into an outbox or a queue but is instead sent directly from the program to the Customer. The email does not go to a staging area.



Selecting **Show Email Addresses** on the *Print Invoice Documents* window allows adding or editing email addresses prior to sending the documents. Changes to the email address from this window do not update the Customer file.

Note: Physically printing the document is not required for the email to be generated through CRM. The *Print Invoice* checkbox can be unchecked and the email of the document is still sent to the Customer.



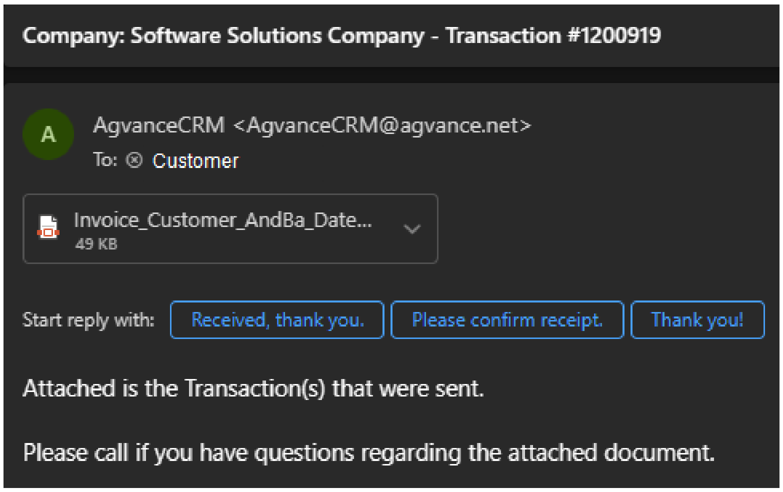
The Email

The email will be automatically formatted by the program and will appear with the following characteristics:

- **From Address –** The email will show as coming from AgvanceCRM@agvance.net if no Mail Host Email is entered at *Hub / Setup / Company Preferences / Mail Host Email*. Customer replies will be sent to the address specified at *CRM / Setup / Preferences / Optional Reply to Email Address*. If no address is specified, replies are sent to noreply@agvance.net or AganceCRM@agvance.net by default.

Note: If a *Mail Host Email* is entered, a *Mail Host* is required.

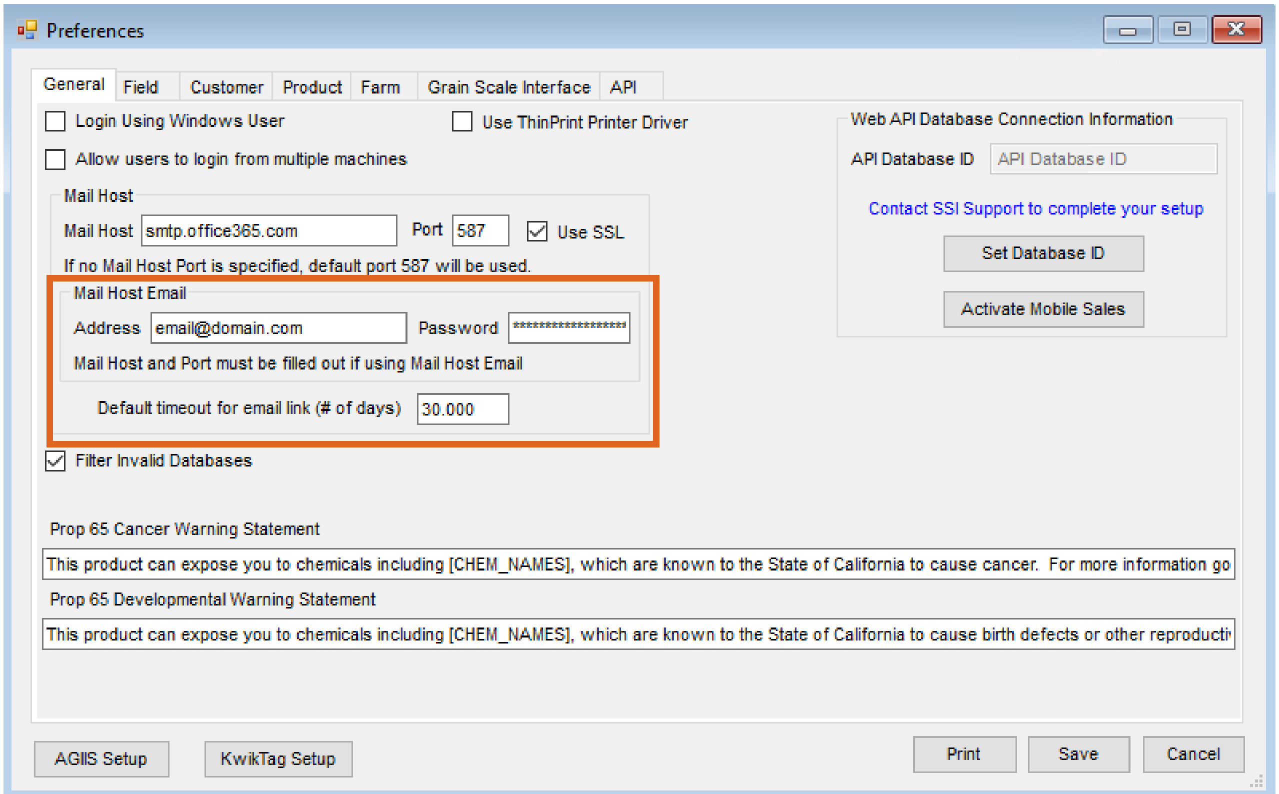
- **Subject** – Company: Location Name - Transaction #xxxxxx
- **Body –** The information entered in *Email Body* at *CRM / Setup / Preferences* is inserted in the email body as well as the hard-coded message *Attached is the Transaction(s) that were sent.*
- **Attachment Name**
  - **Invoice Example** – Invoice_Customer_ 1BakLa_Date_05-28-2021_Time_104756.pdf
  - **WPS example –** wps.txt



Mail Host Email Set Up

The following information applies ONLY to companies with:

1. *Address* and *Password* fields populated in the *Mail Host Email* section found at *Hub / Setup / Company Preferences* AND
2. An *API Database ID* populated AND
3. Version 7.0.21730 or newer installed



Delivery method of the following customer-facing documents will be delivered via email as a link.

1. Sales Invoices (may also send as PDF attachment)
2. Combo Statements
3. Budget Billing Statements
4. Regular AR Statements

Selecting the link will launch the default browser and the document can be viewed, saved, or printed from that view.

Sales Invoices – Customer Set to Direct

If the *Mail Host Email* and the *API Database ID* are populated, Sales Invoice emails will be triggered upon the INITIAL SAVE of the Invoice instead of the print. This holds true for Invoices that are entered manually or created upon import. The Grower will receive a link to view the Invoice instead of receiving it as a file attachment. This link will be active for the number of days set at *Hub / Setup / Company Preferences*.

The default is 30 days but can be changed. Setting limits increases security for the Grower. Links can be resent if needed. (See *Email Utility* section below for more.) The maximum number of days is *999*.

Choosing the link will open a view as a PDF using the default browser. Recipients have the option to download and save or print. The Invoice link to the cloud document will be emailed on the original save of the Invoice. Voiding an Invoice for Customers set to *Direct* will receive a link to the voided Invoice. Edits will not trigger a new link. Payments will not trigger a new link.

Invoices created from a sales import with payments in the form of an Agvance payment will have an *Open* status. Invoices created from a sales import in the form of a credit line-item payment will be sent with a *Paid* status.

Sales Invoices – Customer Set to Staged

The addition of an Invoice will place the document in the CRM queue until it is manually sent. This holds true for Invoices created manually or via import. Recipients will receive a link instead of a file attachment.

In the event an Invoice is voided, the CRM queue will be checked to see if the original has been sent. If the original has been sent, the void will be sent as well. If the original has not been sent, the Customer will receive neither the original nor the void.

If the Invoice is in the queue and edits or payments are made, the link will be updated and the recipient will receive the most recent updates.

If the recipient has more than one document staged (i.e., three Invoices and one Customer Statement), that recipient will receive one email that includes all the links to the documents that are staged.

Special attention needs to be paid to situations where recipients set to *Staged* are changed while documents remain in the queue.

Example 1: The emails for Farmer A and Farmer B are set to *Staged* for Invoices on the Jones Family Farm Customer account. An Invoice is created for the farm account and the record is added to the queue. Farmer B is removed from the account and Farmer C is added. If the Invoice is edited and saved, the links will be updated and Farmer A and Farmer C will each receive a link to the Invoice. If the documents are in the queue, the email recipients change, and the Invoice is NOT re-saved, the links will be sent to Farmer A and Farmer B.

Example 2: Farmer A and Farmer B are set to *Staged* for Invoices on the Jones Family Farm Customer account. An Invoice is created for the farm account and the record is added to the queue. Links to the Invoices are sent. Farmer A and Farmer B receive links to the Invoice. Farmer B is removed from the account and Farmer C is added. The Invoice is voided. The record for the void is sent to the queue. Links to the Invoices are sent. Farmer A and Farmer C will each receive a link to the voided Invoice.

Sales Invoices – Customer Set to MFR

Sales Invoices created in databases meeting the criteria stated above will be sent to Grower360.

Print Emailed Invoices

On the *Print Invoice Documents* window that appears upon saving an Invoice, the *Print Emailed Invoices* option is available to use on split Invoices where some Customers have an email set up and others on the split do not. Checking this option will print out all Invoices including those emailed. Leaving it unchecked will ONLY physically print Invoices for Customers who do NOT have an email set up.

Statements (Regular, Combo, and Budget) – Customer Set to Direct

Send statements to Grower360 will take the place of the CRM Customers and serve both purposes. The recipient will receive a link to view their Statement instead of an email with a file attachment. The email to the recipient is triggered upon selecting **Export**. Choosing the link opens the PDF in the default browser window where it can be viewed, saved, or printed.

Statements (Regular, Combo, and Budget) – Customer Set to Staged

In the event a Statement is regenerated while the original is still in the CRM queue, the existing link will be updated, and the recipient will receive the most recent version. In the event a Statement has been sent from the queue and a new Statement is generated, a new link with the updated version will be sent.

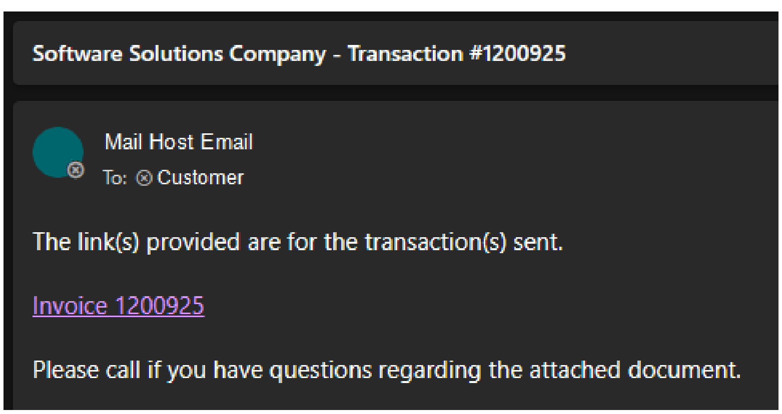
Sending Statements from Play Data - Staged

Statements may continue to be generated from a LINKED prior month dataset. The process of generating the Statements will continue to be completed in the prior month data. However, the Statements must be sent from the CRM module in the CURRENT data.

The Email

The email will be automatically formatted by the program and will appear with the following characteristics:

- **From Address –** The *From Address* will be the Mail Host Email. The Reply will be to the Mail Host Email (it does not look at the preference in CRM when a Mail Host Email is set up).
- **Subject –** Company: Location Name - Transaction #xxxxxx
- **Body** – A message stating *The links provided are for the requested transactions,* the link to the transaction, and the information entered in *Email Body* at *CRM / Setup / Preferences* display in the body of the email.



Resend Email Utility

A utility is available to resend Regular AR Statements, Combo Statements, and Budget Statements that have been sent to Grower360 as well as Invoices that have been saved since the API Database ID has been in place. This is found at *Hub / Utilities / Resend Email Links*.

First, select a *Customer*. This list is populated by Customers who are set to auto deliver Invoices, Combo Statements, or Budget Statements with an email address.

The filter drop-down is populated based on the order they were sent to Grower360. Documents on *AR Statement* and *Budget Billing Statemen*t tabs are listed based on the sort order of the drop-down. The *Statement* filter defaults to *ALL*. Right-click a Combo or Budget Billing Statement to view the Statement in a browser window. Use the single arrow to pull desired documents into shopping cart and choose **Send Email** to re-send.

The *Invoice* tab is populated by each instance of an Invoice that has been sent. Customers may be set to either *Direct* or *Staged*. If the Customer is set to *Direct*, records will be added when Invoices are initially saved or edited. Paying the Invoice does not create a new record. If the Customer is set to *Staged*, records will be added upon the initial save of the Invoice, editing the Invoice, and the Payment.

The date range is populated by oldest to newest dates based on the *Date Sent* date. The starting date will be populated with the oldest sent date minus one day. The *Date* column represents the Invoice date and is not used for the date range.

Note that the stacked arrow will pull down all instances, which could result in sending multiple versions of the Invoice. Extra lines can be removed prior to sending by highlighting the line number and pressing the **Delete** key.

Version 7.0.25940

If a Mail Host Email was entered but some transactions were staged for CRM delivery before entering the Mail Host Email, the Resend Email utility can be used. In CRM, the transactions show as PDFs rather than a link and editing/saving the transaction does not create a link.

Anything in the Resend Email utility can be emailed as a link. Alternatively, the process in CRM can be used as it has been. For those that are a PDF, it will use CRM with the new setup to send the email. If a link, it will send the link and, if the *Include PDF as Attachment* was checked, will add a PDF as an attachment as well to the email.

Troubleshooting

Emails generated with this feature will be populated in the *Sent* folder of the account set in the *Email Host* field at *Hub / Setup / Company Preferences.* This folder can be checked to verify a document email was sent. In the event this folder is not available, the Resend Email Links utility can be used to generate the email manually.

For the following customer-facing documents, see this tab

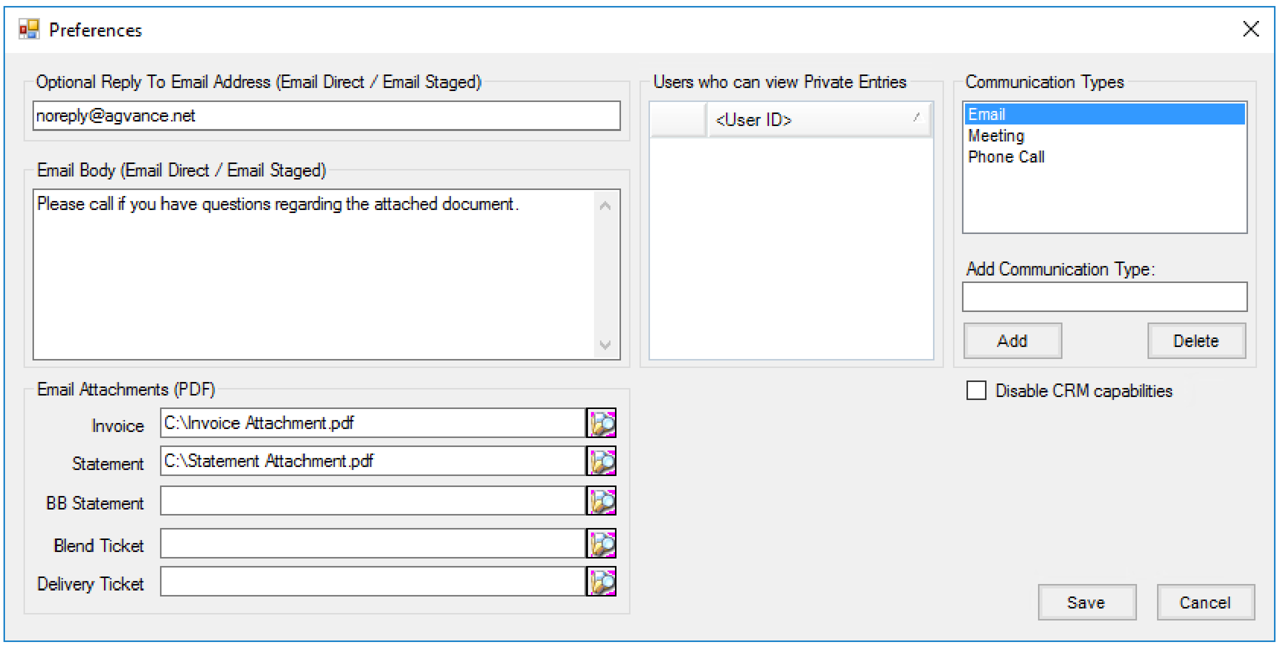
- Agrian Rec Delivery Ticket
- Blend Ticket
- Booking
- Booking Contract
- Custom App Blend Ticket
- Delivery Ticket
- Field Plan
- Grain Balance Detail
- Payment Receipt
- Purchase Contract

- Purchase Offer Contract
- Sales Order
- Settlement Document
- WPS

Setup

Preferences

The email created by CRM can be customized at *CRM / Setup / Preferences*. The *Optional Reply To Email Address* and *Email Body* message can be defined and will be used for each email sent through Agvance CRM.



- **Communication Types** – At *CRM / Setup / Preferences*, the *Communication Types* available in CRM can be managed. The *Email*, *Meeting*, and *Phone Call* types are pre-loaded and cannot be removed. Other Communication Types can be added or deleted in this area.
- **Users Who can View Private Entries** – Based on user security, CRM Journal Entries can be set to *Private* status. Setting an entry to private will hide the entry from other CRM Users who are not authorized to enter or read private entries. Set up specific Users by double-clicking on *<User ID>* at *CRM / Setup / Preferences*.
- **Email Attachments** – For Invoices, Statements, Budget Billing Statements, Blend Tickets, or Delivery Tickets with additional terms or information to be sent with each email, the PDF of those terms is saved here. As the emails are sent, the PDFs are included as an attachment for the specified document.
  Attachments can be sent along with Invoices and Combo Statements. Attachments are set in the path at the bottom of the window. The document set in this path must truly exist at this path or be blank in order to save the window. The attachment included would be determined by whatever document is in this path for this

User.

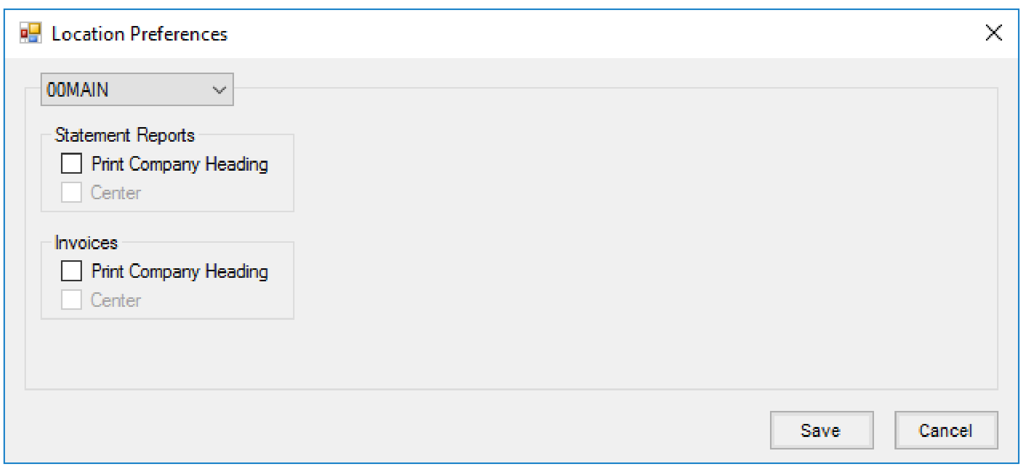
Regarding attachments:

1. Whoever saves this window last gets their PDF saved into the database
2. For Invoices:
    a. At the save of the Invoice, it looks at the *Invoice* path first.
    b. If it exists, it looks for the document locally.
    c. If the document does not exist locally, it looks at what is saved in the database. This allows those who do not have an attachment set here for their User to include an attachment.
3. Statements follow the original rules when being sent to Grower360.
4. The attachment gets merged in with the document into a single link as long as the attachment is saved as a PDF file.

- **Disable CRM capabilities –** This option allows CRM capabilities to be disabled which is helpful for archived datasets. With this option selected, reprinting transactions from an archived dataset does not trigger an email to be sent to the Customer.

Location Preferences

Select the Location at *CRM / Setup / Location Preferences* to set the following options.



- **Statement Reports –** If the company heading should print on the emailed Statements, select the *Print Company Heading* option. If the heading is to be centered on the page, select the *Center* option.
- **Invoices** – If a *Mail Host Email* is NOT entered and SendGrid is being used to email Invoices, the *Print Company Heading* option is honored. If the heading should be centered on the page, select the *Center* option.

  Note: If a *Mail Host Email* is entered at *Hub / Setup / Company Preferences*, the *Print Company Heading* preference on the *Invoice Printout* tab at *Accounting / Location Preferences* will be honored.

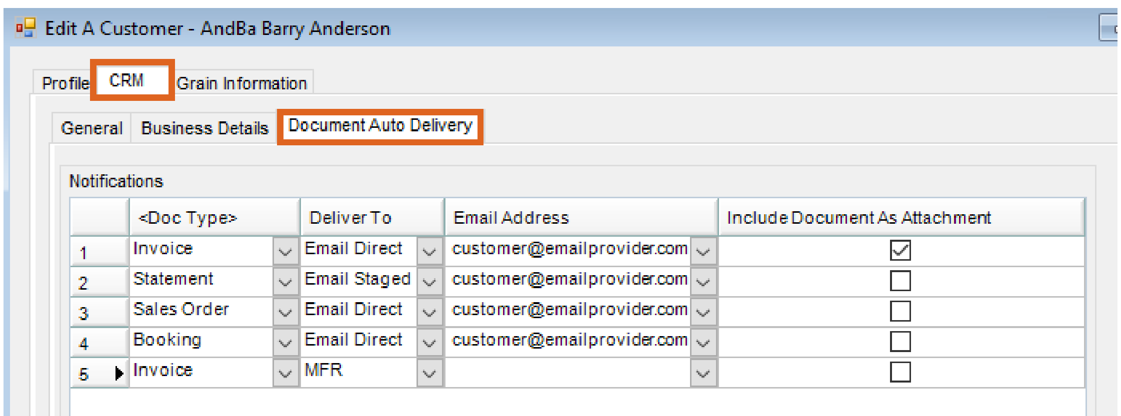
Note: If a logo is set up at *Accounting / Setup / Location Preferences* on the *Logo* tab, the logo will display on the document that is sent.

With the *API Database ID* and *Mail Host Email* section populated at *Hub / Setup / Company Preferences* on the *General* tab, to ensure the actual Invoice printout does NOT print company information and the email DOES print the company logo, navigate to *Accounting / Setup / Location Preferences*.

- On the *Invoice Printout* tab, make sure the *Print Company Heading* option is UNCHECKED.
- On the *Logo* tab, uncheck *Print Logo* for *AR Invoice* and make sure a logo is uploaded.

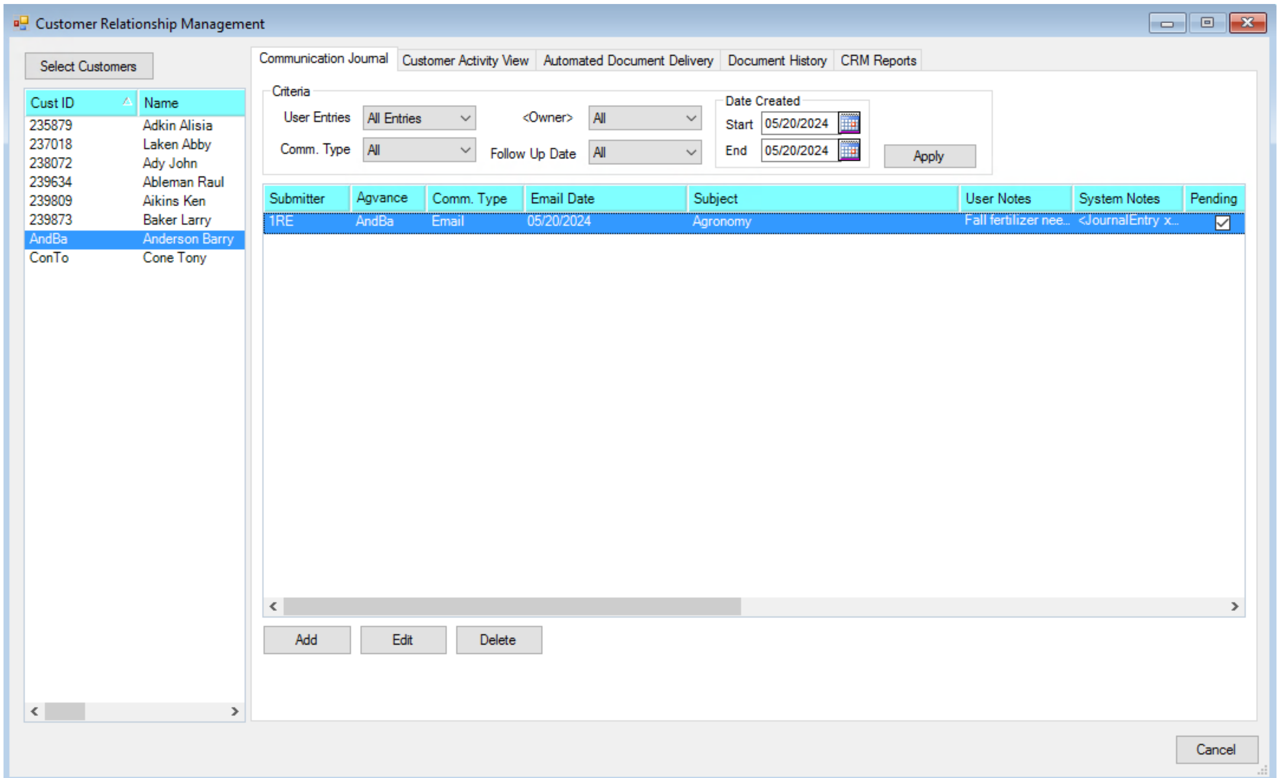
Customer

To set up a Customer for the electronic delivery of documents, edit the Customer in the Hub or Accounting and select the *CRM* tab. Choose the *Document Auto Delivery* tab and select a *Doc Type*, *Deliver To* (delivery method), and associated *Email Address*. The *Include Document as Attachment* checkbox is available for Invoices and Statements. With this checked, a PDF will be sent as an attachment along with the link when the *Deliver To* is *Email Direct* or *Email Staged*.



Communication Journal

The CRM Communication Journal is a centralized database of all communication between a Customer and the company. The Communication Journal is stored in a cloud environment with a central database securely housed on a web server hosted by SSI. The Communication Journal contains Journal Entries associated with an Agvance User ID and an Agvance Customer ID. A Communication Journal entry can include the following information: *Communication Type*, *Entry Date*, *Subject*, *User Notes*, *System Notes*, *Pending Flag*, *Created Date*, *Follow-Up Date*, and *Attachments*.

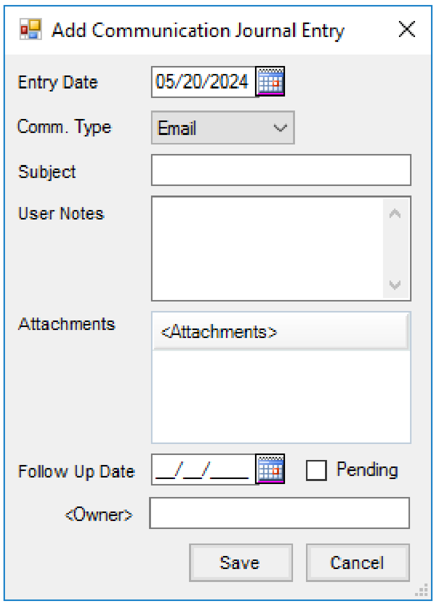


Control Panel Options

- **User Entries** – This defaults to *All Entries*. The other option of *My Entries* filters to show only Communication Journal Entries for whoever is logged in.
- **Comm. Type** – Optionally filter the Communication Journal entries to display by the *Communication Type.*
- **Owner** – This allows filtering based on the current *Owner* set on the Communication entry. This defaults to *All*, but the list can be optionally filtered by any Agvance User.
- **Follow-Up Date** – This filters by the *Follow-Up Date* set on the Communication entry. This defaults to *All* but can be changed to any of the following:
  - Tomorrow
  - Next 7 Days
  - Next 30 Days
  - Next 365 Days
  - Before Today
- **Date Created** – Optionally enter a *Start* and *End* date to display entries created between those dates.
- **Apply** – This applies all selected criteria and displays results in the space below. There are two ways to populate the Communication Journal:
  - Manual entry at *CRM / Control Panel / Communication Journal*
  - Manual entry from the Mobile Sales module

Manual Entry via CRM Control Panel

Upon navigating to the *Communication Journal* tab at *CRM / Control Panel*, manually enter a Communication Journal Entry by selecting **Add**. Add an *Entry Date*, set a *Communication Type*, enter a *Subject*, add *User Notes*, attach documents, enter a *Follow-Up Date*, and set the *Status* to *Pending*. An *Owner* can also be assigned which will optionally alert the Agvance User they are now the owner of a Communication Journal entry (based on the email address set in the User file). Choose **Save** to add the entry to the web database.

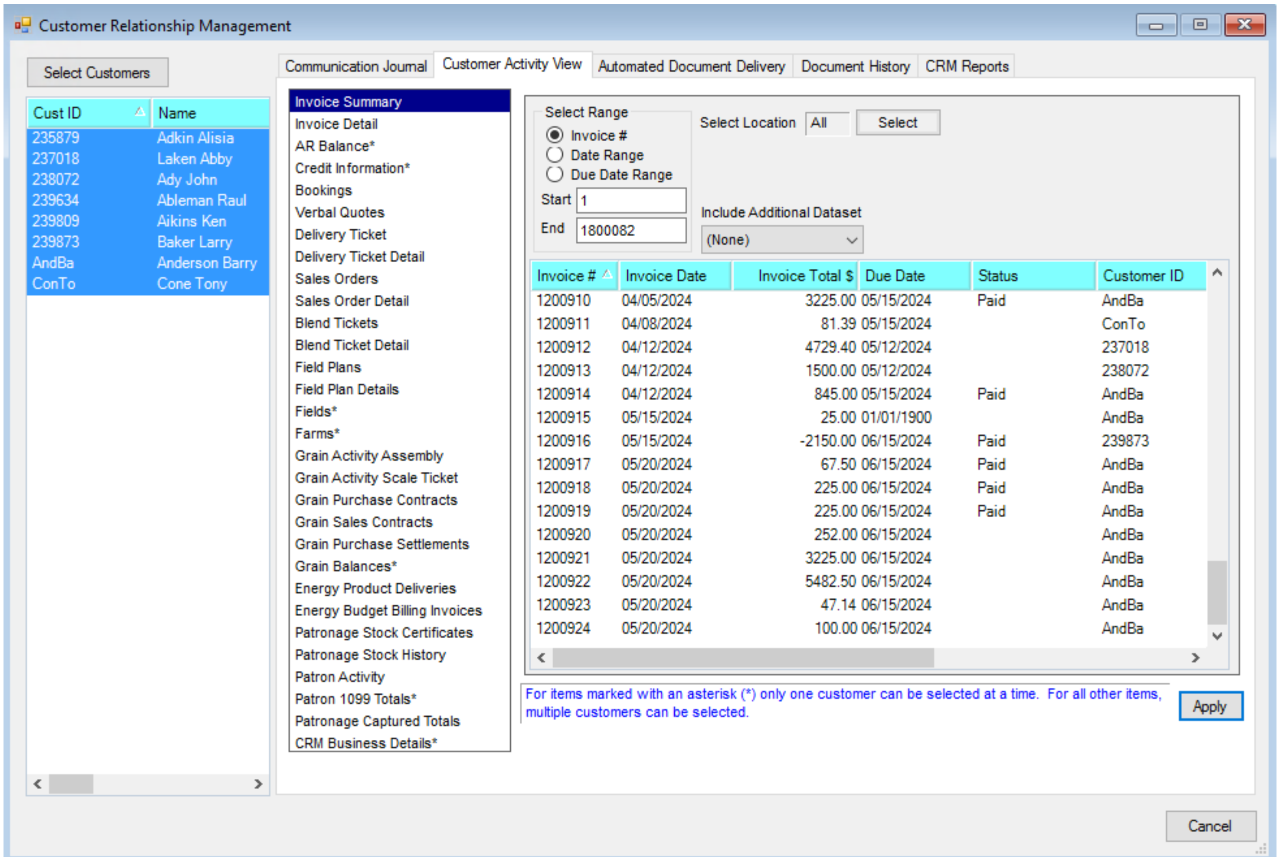


Manual Entry via Mobile Sales Module

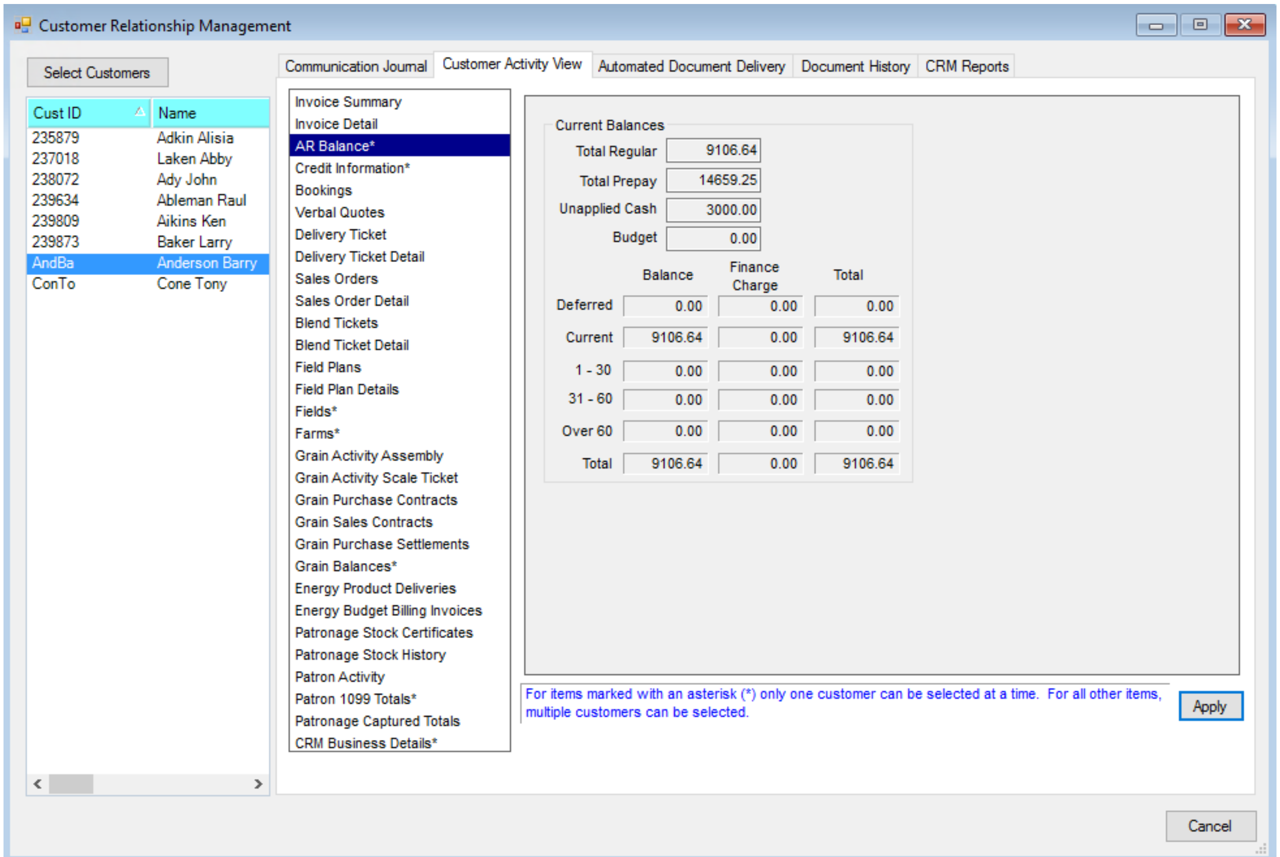
Add a CRM Communication Journal entry in the Mobile Sales module. Select **CRM Journal** to add a new entry, edit, or view an existing entry.

Customer Activity View

The *Customer Activity View* area of CRM provides a place to access transaction details from across all Agvance modules and to view them in a grid format for export. Several transaction types are viewable. Select the type of transaction from the list and complete filtering information to display activity. The filtering options vary depending on the transaction type selected. Once filter options are set, choose **Apply** to display the transactions. In addition, balances and master files can be viewed. Some items (transactions) can be displayed for multiple Customers simultaneously. Other items (master files/balances) are viewable for only one Customer at a time. These items are designated with an asterisk.



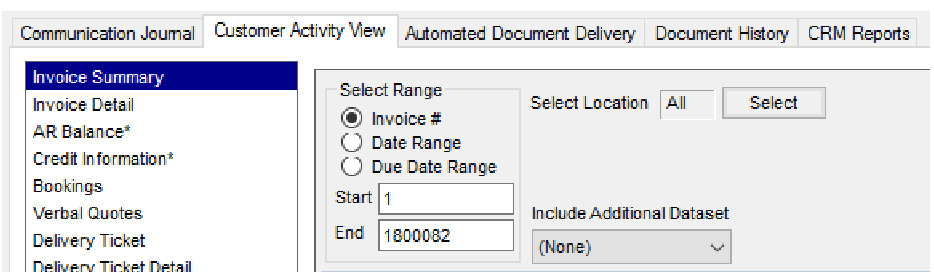
Single Select Customer AR Balance



Filtering

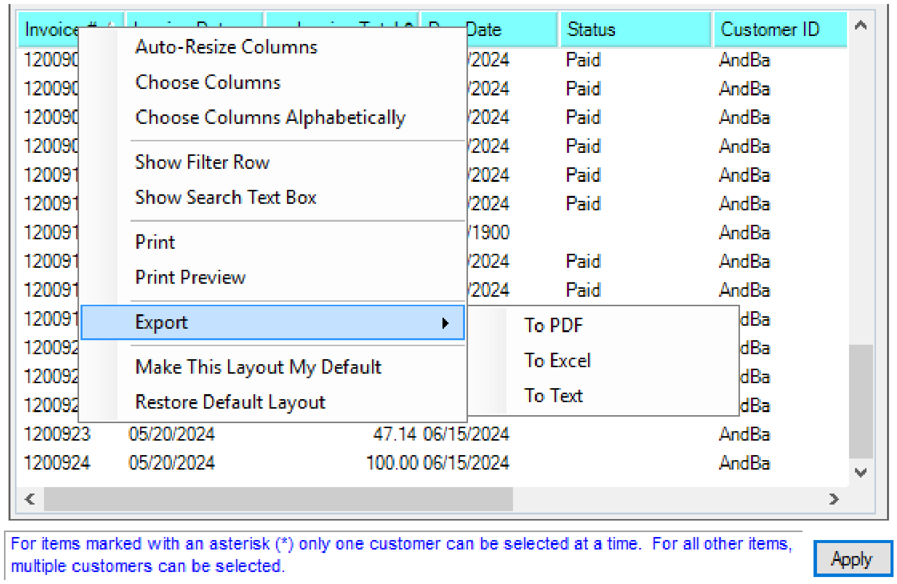
Each viewable transaction can be filtered to give the ability to identify a set of criteria and limit the records to be returned.

Invoice Summary Filter



Sorting and Exporting

Once the records are in the grid, it can be customized by right-clicking on any grid header row. Columns can be selected and/or reordered and data can be filtered. The grid data can also be exported to a spreadsheet, a comma-delimited text file, or PDF.



This allows the opportunity to create powerful custom reports based on Customer transactions. In addition, this eliminates the need to navigate from one Agvance module to another to gather information for reporting purposes.

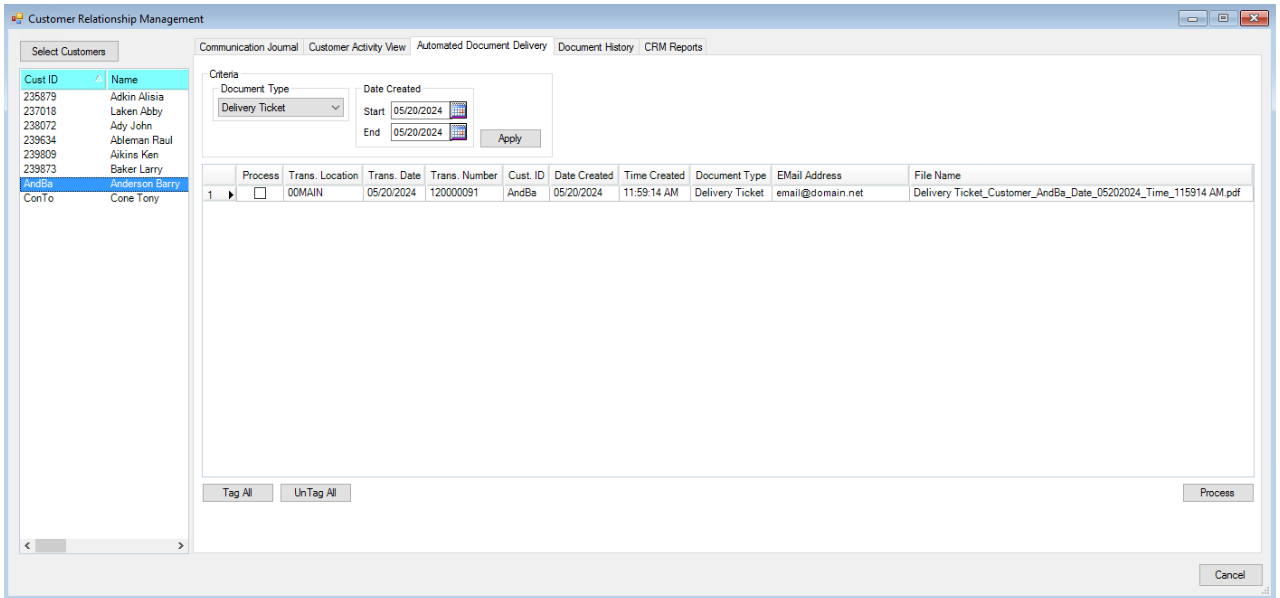
Automated Document Delivery

Email Staged

Printing a document set up for *Email Staged* places a PDF of the document into a queue for later delivery via email to the associated email address.

Processing Staged Emails

After selecting **OK** at the *Print Invoice Documents* window, the emails are generated. Documents set for *Email Staged* are sent to the staged email queue, which is managed from *CRM / Control Panel* on the *Automated Document Delivery* tab.



At this window, the records to be emailed can be filtered by *Document Type*. A date range for documents based on the date created can also be specified.

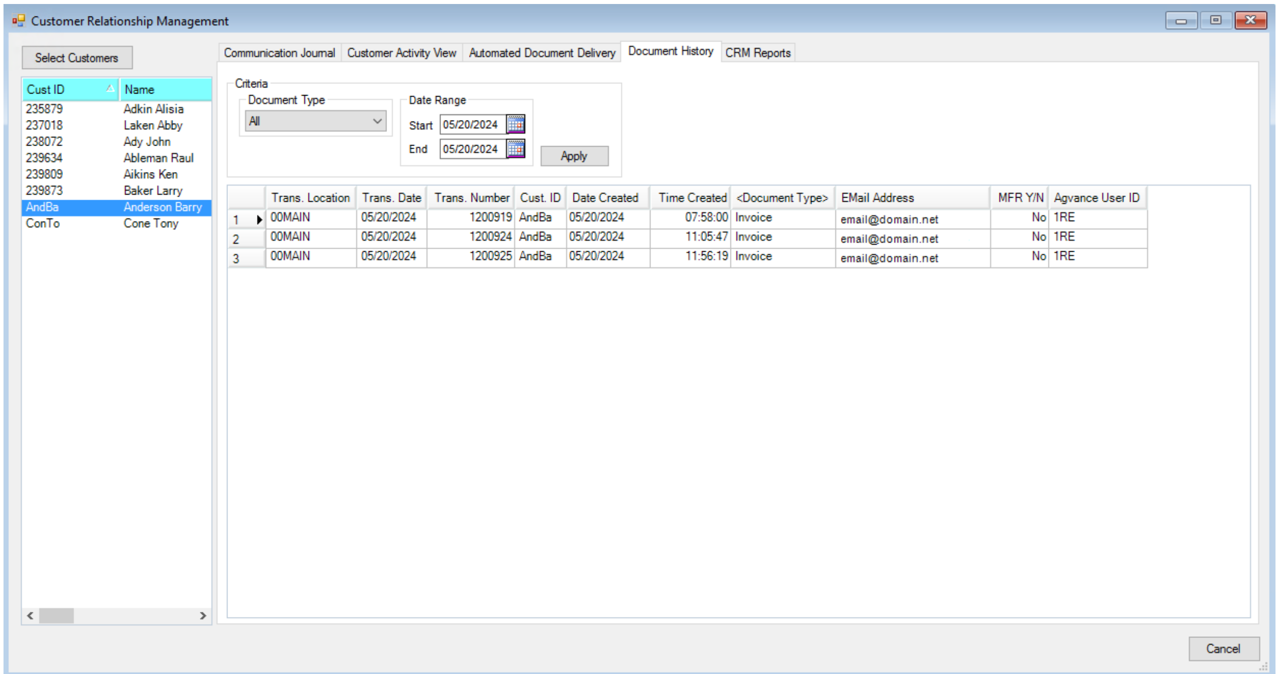
- **Document Type** – This defaults to *All* entries, but a specific *Document Type* can be selected from the drop-down menu.
- **Date Created** – Optionally enter a *Start* and *End* date range.
- **Apply** – Selecting this will apply selected criteria and display *Email Staged* documents in the space below.
- **Tag All/Untag All** – These options quickly select or deselect all items displayed in the grid.
- **Process** – This generates the emails for selected items in the grid.

Note: Emails are generated and sent from an email server set up, maintained, and hosted by SSI unless the *Mail Host Email* is set up at *Hub / Setup / Company Preferences* on the *General* tab. When a *Mail Host Email* is set up, app passwords may be required for Office365 accounts with multi-factor authentication (MFA) turned on. Sometimes it is necessary to enable Authenticated SMTP. For Gmail accounts with MFA turned on, the account must be set to *Allow Less Secure Apps.*

Agvance currently generates emails using Microsoft's basic authentication, which ends on March 1, 2026. This will affect emailing from Agvance regardless of the email platform being used. While it is possible other bulk email services may work, SSI researched and tested using SendGrid® - an emailing service that allows companies to use a bulk email service instead of their existing mail service provider. See **here** for more information.

Document History

This area displays a history of the documents processed through the CRM module.

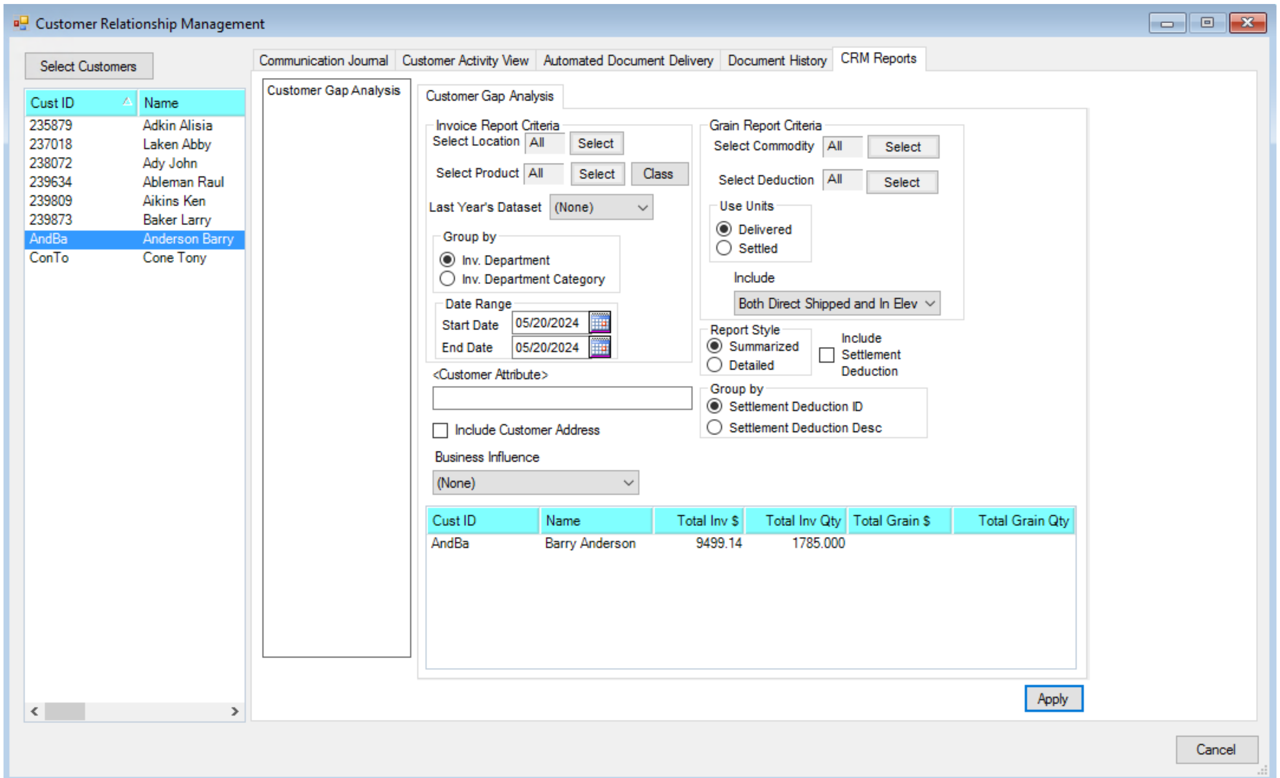


- **Document Type –** Select a type of document to filter what displays.
- **Date Range –** Enter the *Start* and *End* dates to narrow results.

CRM Reports

Customer Gap Analysis

This report is designed to deliver a detailed portrait of a Customer's activity with the company across all lines of business. Agvance Accounting Invoices and Agvance Grain activity are used to formulate the report values. The report is available in a *Detailed* or *Summarized* style. The *Detailed* style shows Invoice totals ($ and quantities), as well as totals by Inventory Department or Inventory Category. The Detailed report also displays Grain totals ($ and quantities) and breaks them down by Commodity. This report helps evaluate Customer activity and identify potential gaps or opportunities within the Customer base.



Invoice Report Criteria

- **Select Location** – Select the specific Locations to filter the report.
- **Select Products** – To run the report based on specific Products, choose **Select** next to *Select Products*. Choose **Class** to select Products based on Classifications.
- **Last Year's Dataset** – To include transactions from a prior fiscal year, select the fiscal year dataset.
- **Group By** – Choose to group the information by Inventory Department or Inventory Department Category.
- **Date Range** – Enter a *Start* and *End* date to display results from that date range.
- **Customer Attribute** – Double-click in this field to select and filter by Attributes.
- **Include Customer Address** – If the Customer address should be included in the report, select this option.
- **Business Influence** – If Business Influences have been established in the Accounting module and on the Customer files, selecting this option will display information for the selected customer and all associated Business Influences.

Grain Report Criteria

- **Select Commodity** – Optionally select the commodities to include in the report. *All* is the default.
- **Select Deduction** – This is available when the *Use Units* are *Settled*. Optionally specify the deductions to include on the report.
- **Use Units** – Choose if the units included in the report should be *Delivered* or *Settled*.
- **Include** – Choose from *Both Direct Shipped* and *In Elevator*, *Direct Shipped*, or *In Elevator* in the filter criteria

options.

- **Report Style** – Select *Summarized* or *Detailed* for this report.
- **Include Settlement Deduction** – Mark this option to include the Settlement Deduction information on the report.
- **Group By** – Select to group the report by *Settlement Deduction ID* or *Settlement Deduction Description.*
- **Apply** – This displays the report information based on the selected criteria.

Exporting the Report

Because this report has the ability to span many columns and can be used as a starting point for further business analysis, it is recommended the report be exported from the CRM grid into an Excel spreadsheet (or similar program). To export, right-click the grid header row, place the cursor over *Export*, and select from the options displayed.