

Pre-Implementation Documents To Gather And Submit to SSI

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Although our goal is to improve on (rather than emulate) your current system, having an awareness of what your staff and your customers are used to helps us better understand your business. After your first call with SSI's Resource Manager, you will have access to a project in Basecamp (a secure tool our team uses to provide a vision of tasks and documents to you and your SSI Implementation Team throughout the project) and will be able to upload the documents there prior to your kick-off conference call with the team.

Note: All documents submitted are considered confidential and are only used to help our team determine the best setup of Agvance to meet you and your customers' needs.

- ☐ 4 to 8 sample invoices from your current system showing split billing, prepay, discounts, sales tax, and any other special situations
- ☐ Corresponding Customer End-of-Month statements to the examples above
- ☐ Blend and/or Delivery Work Order samples
- ☐ Sales and Purchase Contracts (grain, fertilizer, fuel, seed, etc.)
- ☐ Grain Daily Position Report, Policy Document, and Shrink & Discount Schedules
- ☐ General Ledger Chart of Accounts
- ☐ Any other significant reports or documents that are key to your business
- ☐ Financial Statements