

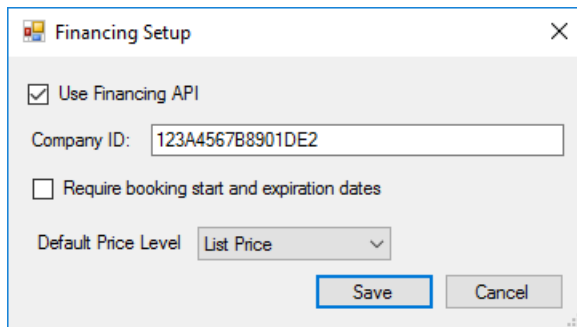
# ProPartners Integration

Last Modified on 10/26/2022 10:49 am CDT

An integration with ProPartners is a custom feature Agvance customers can use to connect to a third-party financing network to manage customer A/R balances. The retailer will facilitate the loan with the grower. The financial network originates the loans with growers. The Agvance user then pulls these loans into Agvance via the *Loan API*. Agvance users can access grower's loan amounts to pay outstanding A/R balances. When an outstanding A/R balance is applied to these loans, Agvance sends a *Draw* to ProPartners via the API. The originating bank then remits the money to the retailer for payment of the customer's balance and increases the loan balance on the customer. This financial network is managed by an originating bank, ProPartners Financial.

## Setup

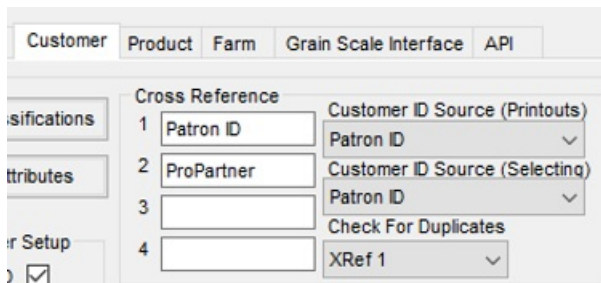
1. Set up API integration with ProPartners.



The image shows a 'Financing Setup' dialog box with the following fields and options:

- ☒ Use Financing API
- Company ID:
- ☐ Require booking start and expiration dates
- Default Price Level:
- Buttons: Save, Cancel

- a. Go to *Hub / Utilities / Custom Features / Financing / Setup*.
  - b. Check the box to *Use Financing API*.
  - c. Enter the *Company ID* provided by ProPartners.
  - d. Optionally select to *Require booking start and expiration dates*.
  - e. Select the *Default Price Level*.
  - f. Choose **Save**.
2. Create a new Cross Reference to identify customers participating in the ProPartners Integration.

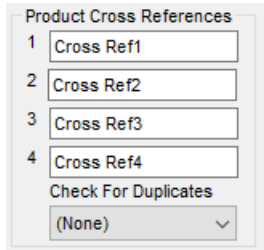


The image shows a 'Cross Reference' setup screen with the following fields and options:

- Customer ID Source (Printouts):
- Customer ID Source (Selecting):
- Check For Duplicates:

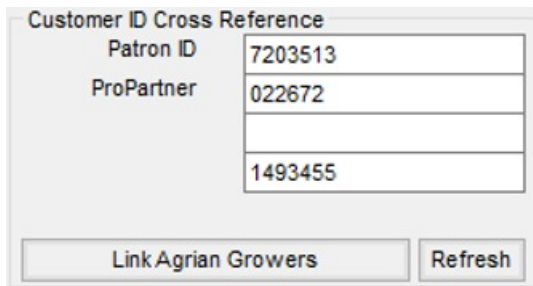
- a. Go to *Hub / Setup / Company Preferences* and select the *Customer* tab. Cross Reference
  - b. In the Cross Reference section, enter a name for the Cross Reference to designate customers using the ProPartners Integration.
  - c. Select **Save**.
3. Optionally create a new Cross Reference to identify products used for specific loan purposes.

**Note:** This is for informational purposes only to pull product reports based on loan purpose. Agvance does not enforce loan purposes.



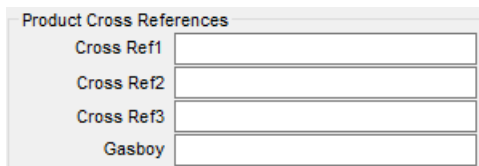
The screenshot shows a form titled "Product Cross References". It contains four numbered input fields labeled "Cross Ref1", "Cross Ref2", "Cross Ref3", and "Cross Ref4". Below these fields is a label "Check For Duplicates" followed by a dropdown menu currently set to "(None)".

- a. Go to *Hub / Setup / Company Preferences* and select the *Product* tab. Product Cross Reference
  - b. In the *Product Cross References* section, enter a name for the Product Cross Reference used to designate products for a specific loan purpose.
  - c. Select **Save**.
4. Establish a Customer ID Cross Reference to identify customers with their ProPartners Party ID.



The screenshot shows a form titled "Customer ID Cross Reference". It has two columns. The left column has labels "Patron ID" and "ProPartner". The right column has four input fields. The first field contains "7203513", the second contains "022672", the third is empty, and the fourth contains "1493455". At the bottom of the form are two buttons: "Link Agrian Growers" and "Refresh".

- a. Go to *Hub / File / Open / Customers*.
  - b. Edit the customer and enter the ProPartners Party ID in the appropriate *Customer ID Cross Reference* field.
  - c. Select **Save**.
5. Optionally add Product Cross References on products being used for specific loan purposes.



The screenshot shows a form titled "Product Cross References". It contains four input fields labeled "Cross Ref1", "Cross Ref2", "Cross Ref3", and "Gasboy".

- a. Go to *Hub / File / Open / Products*.
  - b. Edit the Product and enter the *Product Cross Reference* ID Code.
  - c. Select **Save**.
6. Establish a Pay Method.

	Pay Method	Short Description	Long Description	<00MAIN>
8	Visa	Visa	Visa	Credit Card Clearing
9	MasterCard	MasterCard	MasterCard	Credit Card Clearing
10	Discover	Discover	Discover	Credit Card Clearing
11	Budget DNU	Budget DNU	Budget DNU	Budget Billing Receivable
12	Cash Back	Cash Back	Cash Back	Undeposited Cash
13	Test	test	test	Undeposited Cash
14	Financed Prod	Financed Prod	Financed Prod	Financed Product Clearing
15	Respray	Respray	Respray	Respray Clearing
16	ProPartners	ProPartners	ProPartners	Checking Account - 1st...

Buttons: Add Row, OK, Cancel

- a. Go to *Accounting / Setup / A/R / Pay Methods*.
- b. Choose **Add Row**.
- c. Enter a Pay Method to identify payments that will be made via the ProPartners Integration. Select the appropriate G/L for each Location for posting purposes.
- d. Select **OK**.

## Import Loans

1. Get new loan balances and import daily loan balances via the GET Loans API endpoint.
  - a. Go to *Hub / Utilities / Custom Features / Financing / Import Loans*.
  - b. Select **Import**.
  - c. Choose the appropriate *Customer Xref* from the drop-down.
  - d. To utilize the automatic loan assignment, select **Assign Loans** on the *Loans* screen. This process will automatically assign new loans to customers in Agvance that have an established Cross Reference matching a Party ID.
    - Print or save the report for reference of loans that were auto assigned. Select **OK**.
2. To manually assign loans, select the loan information from the *Loans* grid.

**Loans:**

	Loan ID	Party Name	Party ID	Status	Total Credit	Peak Amount	Int Bal	Daily Int	Crop Year	Effective D
1	1393487000	CHIAVETT...	4889048	A	75000.00	22333.46	11.61	0.00	2022	09/07/2021
2	1393551800	RICHARDS...	4974459	A	12000.00	12000.00	162.92	1.65	2022	09/07/2021
3	1393573100	ZEH JAME...	4920814	A	30000.00	30000.00	221.79	2.37	2022	09/03/2021
4	1393573200	BRYANT P...	4969604	A	25000.00	25000.00	61.62	0.61	2022	09/03/2021
5	1393573800	HOLLAND...	4965723	A	15000.00	15000.00	1.63	0.81	2022	09/03/2021
6	1393573700	MADEIT HL...	4489283	A	15000.00	15000.00	359.69	3.08	2022	09/03/2021
7	1393573800	SWANN ML...	4876293	A	10000.00	10000.00	0.00	0.00	2022	09/03/2021
8	1393576400	WICKENZIE...	4926617	A	10000.00	10000.00	15.35	0.56	2022	09/03/2021

**Customers:**

<Customer ID>	Customer Name	Salesperson	Pay Terms

Loan ID:  Search

☒ Show only unassigned loans

Advance Status:

Automatic Loan Assignment:

Year:  Assign Loans

Save Cancel

3. Double-click the <Customer ID> in the Customers grid to search for the appropriate customer.
4. Optionally sort the Loans grid by selecting column headings. Filter by Advance Status and Crop Year.

## Take Payments

1. Use financed funds to pay Invoices and Bookings via the POST Draw API endpoint.
  1. Go to Hub / Utilities / Custom Features / Financing / Take Payments .
  2. Select the loan information from the Create Finance Payments window.
  3. To complete the draw process to pay open Invoices, select the POA option and choose **Post**.
2. To complete the draw process to create generic prepaid Bookings, add the Booking Amount.
  - a. Select the Booking checkbox and the appropriate Booking Classification.
  - b. Select **Post**.
 

**Note:** Optionally take a payment on the save of an Invoice in A/R via the Receive Payment on Account window. Advance follows and enforces the payment guidelines established by ProPartners. More details are available through ProPartners.

## Edit Loans

To access the Loans screen or complete additional loan assignments without importing new loans, go to Hub / Utilities / Custom Features / Financing / Edit Loans.

## Reports

Go to Hub / Utilities / Custom Features / Financing / Reports.

- **Unpaid Draw Report** – This report provides information regarding the draws made for a specific date.

- **Transaction Detail Report** – This report provides grower information regarding purchases paid for by the loan and can be run across fiscal years.
- **Automatic Loan Assignment Report** – This report provides a list of loans that were linked.  
**Note:** This report is only available on the *Import Loans* screen immediately following the selection of **Assign Loans**.

## Grower360 Functionality

1. Growers who have a loan financed through ProPartners can see basic Loan Balance information on the *Overview* screen in Grower360.
2. On the *Loan Balance* card(s), select **View** to be redirected to the ProPartners website to see additional details regarding the loan(s) and make payments.