

AgWorks, LLC.

111 W. 76th Street – Davenport, IA 52806

Procedures for: Creating Bookings

Revisions:

Version	Date	Author	Description
10.1.24 (124)	08/26/2010	Sara Toliver	Creation of document.
11.2.1 (127)	09/15/2011	Sara Toliver	Addition of Booking Start Date

Overview:

The following guide is to assist the user in the task of creating Bookings that will be used later in the program.

Definitions:

- **Booking:** an agreement to deliver a certain product at a certain price within a certain period of time.
- **Prepay:** When a customer pays for product before a delivery and the supplier agrees to provide the product at an agreed upon price.
- **Splits:** taking a percentage of the sale and sharing the cost amongst multiple customers.

Warning/Notice:

- Users should book the entire split.
 - Reason: Shipments will automatically reduce the booking.
 - AgWorks' design requires that the booking reflect the total across the booked acres including all "split partners".
- Do not create the Booking for the landlord.
 - Reason: Farm splits are tied to the operators.
- Bookings should be made for the individual (not the Entity). When the Delivery Ticket of allocated product(s) from the Entity is created, it will take the booked price from the appropriate Booking if applicable.
- Prepay pricing will have a higher priority than the Booking pricing.
- Prepayments for seed will not recognize or use existing price levels.
 - Reason: The nature of seed pricing with multiple and variable discounts.
 - On a prepayment ticket for seed, the pricing will always come from the seed booking. The pricing level selected on the prepay should remain at retail to allow for discounts to be properly calculated.
- Within AgroDoc, users can create a Crop Plan which can be converted to a Quote within DeliveryDoc. Within DeliveryDoc, users can create a Quote that can be converted to a Booking.

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- Regarding Confirmation functionality:
 - Buttons enabled on bookings when
 - User has Seed Manager permissions enabled
 - Booking is created and saved
 - Buttons not specific to product(s) used on booking. This function can be used for seed, chemical, or any other products.
 - Companies use Confirm and Confirm All buttons for two reasons
 - When a user confirms the original booking with the customer -- verifying that the product on the contract is still desirable.
 - When a user confirms the original booking with the manufacturer -- verifying that the product on the contract will be available for the season.
 - Example, if modifier of seed changed.
 - Should a user find modifiers need to be adjusted on multiple bookings AgWorks seed substitution functionality is a helpful solution

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Procedures:

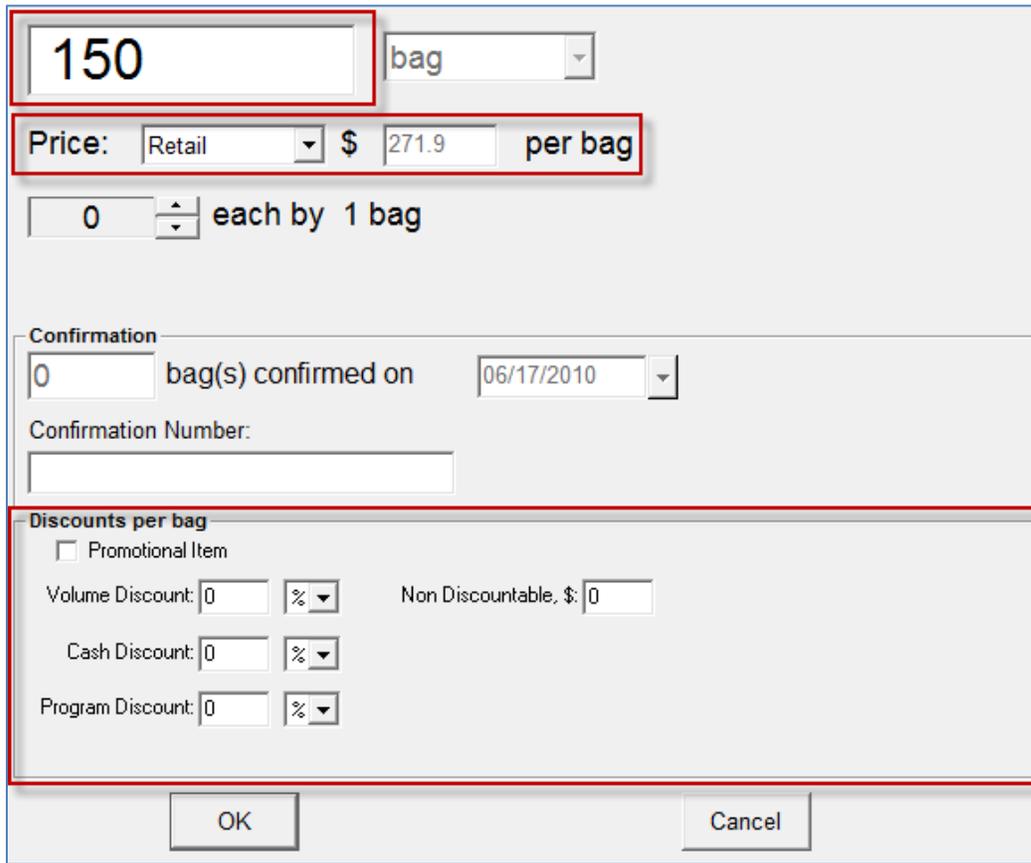
1. Within Delivery Doc, navigate to: Sales/Deliveries > Add New, select Customer Operation, and then select Booking.
 - You may also use the Booking Quick Button



2. Select the Customer to create the Booking for.
 - Remember – if you are creating a booking for a split farm partnership, do not create the booking for the landlord.
3. If applicable, add a farm to the Booking.



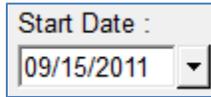
- This is required if you are creating a booking for a split farm partnership.
4. Add your product(s) to the Booking.
 5. Enter your product quantity, pricing, and discount(s), if applicable. Click OK to save your changes.



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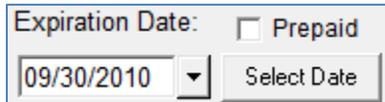
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6. Select a start date for the booking



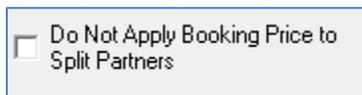
- The booking start date is not required.
- The booking start date will default to the creation date of the booking.
- The booking will be considered deferred until the booking start date; therefore, no product will be unbooked from this booking until the day of the start date.

7. Select an expiration date for the booking.



- The booking expiration date is required.
- This date is set to determine when the Booking is no longer valid, and when all products on the Booking must be picked up by.
- You may use the drop down list to display a calendar, or use the “select date” button to choose from a pre-determined list.

8. If you prefer, you may select “do not apply Booking price to split partners”.



- This will ensure that the price agreement on the Booking is not shared to amongst the split partners. The “master” on the customer account will receive the booked price. All other split partners will receive retail pricing, or the price that is on their Prepay.

9. Click OK to save your changes and complete this task.

10. Some users confirm quantities with grower after booking created.

- Navigate into desired Booking
 - Select *Confirm* to specify quantity
 - Select *Confirm All* to confirm complete booking

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Examples:

When completed, your Booking may look something like this:

Delivery document information

1613 Farm: Home [View Farm Split](#)

Originated at: Miles Warehouse (Location: MILES) Home

To: Filburg Robert [App.](#)

<Total Prepay Available : \$37851.06>

Type: Customer operation Booking Volume Discount

Product Name	Quantity	Remaining	Confirmed	Price	Prom Item
DKC53-41 AF/None/bag [1 bag]	125 bag	125	0	\$315.00	<input type="checkbox"/>
DKC53-41 AF/Poncho 1250/bag [1 bag]	125 bag	125	0	\$349.90	<input type="checkbox"/>

Total: \$81,450.25

Buttons: Add, Scan, Edit, Delete, Confirm, Confirm All

Comments:

Changes Log:

View: MSDS LABEL WPS

Print Changes Log:

Buttons: OK, Print, Cancel

Misc:

Created on 9/15/2011 8:33:00 AM by Clyde

Modified on 9/15/2011 8:33:00 AM by Clyde

Invoiced

Start Date: 01/01/2012 Prepaid

Expiration Date: 06/15/2012

Quantities were changed

Do Not Apply Booking Price to Split Partners

When you print your Booking, it may look something like this:

AgWorks
Programmed to Grow

AgWorks Demo Company
111 W. 76th Street, Davenport, IA 52806, Phone: (309) 623-4604 Fax: (563) 242-2006
E-mail: support@agworks.net Web: www.agworks.net

"Programmed to Grow"

Created: 9/15/2011 8:33:00AM by Clyde

Current warehouse : Miles Warehouse

Seed Order # 1,613

Robert Filburg Account: 10010
30206 Bellevue Cascade Road Phone: (563) 577-2323
Bellevue, IA 52031 Lic. or Permit # P10G0815 Exp. 12/31/2011

Farm: Home

#	Product ID	Product Name	Quantity	Unit Price	Subtotal
1	10,144 [10144]	DKC53-41 AF/None/bag [1 bag]	125 bag Remaining: 125 bag	\$308.70 / bag	\$38,587.50
Retail \$315.00. This price included 2.00% volume discount total of \$6.30 per bag					
2	10,144 [10144]	DKC53-41 AF/Poncho 1250/bag [1 bag]	125 bag Remaining: 125 bag	\$342.902 / bag	\$42,862.75
Retail \$349.90. This price included 2.00% volume discount total of \$7.00 per bag					
Total:					\$81,450.25

Name	Fertilizer		Chemicals		Seed	Lime		Other	
	Appl	Charges	Charges	Charges	Charges	Charges	Services		
Keen Bill	50.00%	50.00%	25.00%	25.00%	50.00%	0.00%	75.00%	75.00%	50.00%
Filburg Robert	50.00%	50.00%	75.00%	75.00%	50.00%	100.00%	25.00%	25.00%	50.00%

Keen Bill share \$40725.12, Filburg Robert share \$40725.12

- Bookings that contain seed products will be referenced as a "Seed Order".
- Farm split information will print at the bottom of the Booking.

Need help? Contact AgWorks Support at (855)249-6757, option 2.