

AgWorks, Inc.

111 W 76th Street – Davenport, IA 52806

Procedures for:

Set up of Company Configuration

Revisions:

Version	Date	Author	Description
10.1.34 (124)	08/27/2010	Sara Toliver	Creation of document.
11.1.13 (126)	03/29/2011	Sara Toliver	Modifications to the DeliveryDoc and Schedule tabs
11.2.1 (127)	09/15/2011	Sara Toliver	Modifications to Interface tab and Schedule tab. New MPM tab.

Warning/Notice:

- The following assumes price tiers have already been setup.

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Procedures:

1. Open AgWorks Manager
2. Navigate to: Company > General Settings
 - A. The configuration options you set here are location specific
3. On the General Tab, enter information into the appropriate sections below:

The screenshot shows the 'General' tab of the AgWorks Manager interface. The form contains the following fields and sections:

- Company:** AgWorks Demo Company (Callout A)
- Address:** 111 W 76th Street (Callout B)
- City:** Davenport (Callout C)
- State:** IA (Callout C)
- ZIP:** 52806 (Callout C)
- Phone:** (309) 623-4604 (Callout D)
- Fax:** (563) 242-2006 (Callout D)
- County:** Scott (Callout E)
- E-mail:** sales@agworks.net (Callout F)
- WebPage:** http://www.agworks.net (Callout F)
- ICC/EBID:** (Callout G)
- Emergency 24-hour response telephone:** 1-800-xxx-xxxx (Callout H)
- Advertising line on the documents:** Programmed To Grow (Callout I)
- Logo:** AgWorks logo with a 'Load...' button (Callout J)
- Default Pricing:** Retail (Callout K)
- Default Pricing for Applications:** Retail (Callout L)
- Default Cost for Transfers:** From Table (Callout M)

- A. Enter the Company Name
 - i. You may want to add additional information for this specific location
- B. Enter the physical address of this location
- C. Enter the city, state, and zip code for this location
- D. Enter a telephone and fax number for this location
- E. Select an appropriate county from the drop down list
 - i. This will be used to determine taxes and other items that may be county specific.
- F. Enter an email address and webpage for this location
- G. Enter the ICC/EBID for this location
- H. Enter the 24-hour Emergency Response phone number for this location
 - i. This will appear on DOT/Hazmat documentation
- I. Enter the advertising line for this location
- J. Load a logo
 - i. Select *Load*
 - ii. Locate the file on your network
 - iii. This will appear on most documentation printed from AgWorks
- K. Select a default price tier for this location
 - i. This will be the default price tier used for Shipments
- L. Select a default price tier for Field Applications for this location
 - i. This will be the default price tier used for applied Orders
- M. Select a default cost for Transfers for this location

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4. On the Interface Tab, enter information into the appropriate sections below:

- A. Select an appropriate accounting package from the drop down list
- B. Enter this specific location's accounting code
 - i. You may need to consult your accounting company to gather this information.
- C. Enter the Output Directory
 - i. This is where files exported from AgWorks that need to go to your accounting package will reside
 1. This directory may also be used for interfaces with blenders
- D. Enter the Input Directory
 - i. This is where files imported from your accounting packing to AgWorks will reside
 1. This directory may also be used for interfaces with blenders
- E. Enter the Output Filename, if appropriate.
- F. If desired, enable Auto Delay Invoicing for Field Applications
 - i. This will set the billing status to "delayed" on Field Applications and therefore will not be pulled into your accounting package until the delayed status is removed
- G. If you are using the Cinch integration, then you may fill out the portion on the Cinch Database Info so that AgWorks can validate the customer's credit status from your Cinch database.
 - i. You may need to consult your accounting company to gather this information.

5. On the Delivery Doc Tab, enter information into the appropriate sections below:

The screenshot shows the 'Delivery Doc' configuration window in the AgWorks interface. The window has a title bar with tabs: Interface, AGWORKSnet, Delivery Doc, MPM, Schedule, AgroDoc, and Security. The main content area is divided into several sections:

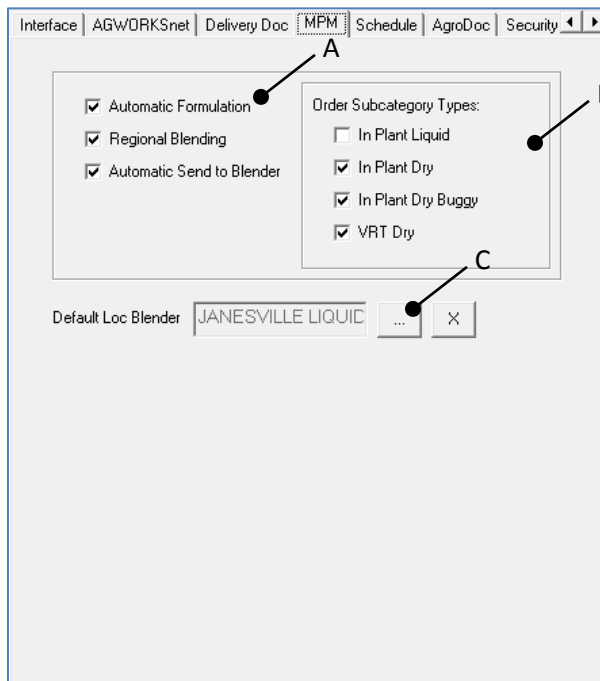
- Printing:** Contains a 'Copies for new documents' field with a value of '1' and a checked 'Preview mode for new documents' checkbox. Below this are 'Copies when reprinted' (value '1'), 'Print new documents' (dropdown menu with 'Ask' selected), and 'Emergency guide' (dropdown menu with 'Never' selected).
- Monsanto Dealer Number:** A text input field.
- Quote Expiration Control:** A checked checkbox for 'Use Default Expiration Date' and a 'Days to Expire' field with a value of '15'.
- Hide All Products:** A button.
- Enhanced functionality:** Contains three checkboxes: 'Automated Unbooking Process' (checked), 'Automated PO selection' (checked), and 'Enable customer entities' (unchecked).

Callouts A through H point to the following elements:

- A: 'Copies for new documents' field
- B: 'Preview mode for new documents' checkbox
- C: 'Print new documents' dropdown menu
- D: 'Emergency guide' dropdown menu
- E: 'Monsanto Dealer Number' field
- F: 'Use Default Expiration Date' checkbox
- G: 'Hide All Products' button
- H: 'Automated Unbooking Process' checkbox

- A. Enter the number of copies of each document you'd like to print on command.
 - i. If preview mode is enabled, only 1 copy will be printed.
- B. Enable/Disable Preview Mode
- C. Select from the drop down list your printing preference
- D. Select from the drop down list your printing preference for Emergency Response Guides
- E. Enter the Monsanto Dealer Number, if appropriate
- F. Setup your Quote Expiration Control
 - i. Enable/Disable the use of a default expiration date on Quotes
 1. If enabled, enter the number of days before a Quote will expire.
- G. Clicking on the Hide All Products button will remove the "visible" status from all products
- H. Enable/Disable Enhanced Functionality
 - i. Automated Unbooking Process
 1. If disabled, the system will no longer automatically unbook applicable product when a Delivery Ticket is created.
 - a. This does not affect the unbooking process for Scale Tickets and Field Applications.
 - ii. Automated PO Selection
 1. The system will choose the oldest PO to associate to an applicable Distributor Shipment if enabled.
 2. The system will allow the user to choose a PO to associate to an applicable Distributor Shipment if disabled.
 - iii. Customer Entities

6. On the MPM Tab, enter the information into the appropriate sections below:



- A. Enabled/Disable the desired Auto MPM controls
 - i. If this is grayed out, you will need to contact AgWorks to enable these advanced features.
 1. Automatic Formulation
 - a. This will automatically formulate one bulk batch for the Order when the user saves the Order. If the Order is edited, then the Order will be automatically reformulated.
 2. Regional Blending
 - a. This will utilize the blender assigned to the Region when Orders are formulated. If this is disabled, then the default location blender will be utilized.
 3. Automatic Send to Blender
 - a. This will automatically send the created Order Delivery Receipt(s) to the blender interface associated when the Order Delivery Receipt is saved.
- B. Enable/Disable specific Order Subcategory Types for the enabled Auto MPM functions
 - i. Those Auto MPM functions enabled will only apply to these enabled Order Subcategory Types
- C. Click on the “...” button to associate a default blender to this location
 - i. This blender will be utilized as the default blender for those Order Subcategory Types that are not enabled within the Auto MPM controls above
 - ii. Clicking on the “x” will remove the associated default location blender

7. On the Schedule Tab, enter the information into the appropriate sections below:

- A. Enter the number of copies of each document you'd like to print on command.
 - i. If preview mode is enabled, only 1 copy will be printed.
- B. Enable/Disable Preview Mode
- C. Select from the drop down list your printing preference
- D. Enable/Disable Print Order Summary
 - i. Users can set controls to preview, ask, or always print the Order Summary. If the documents are set to "always" print, then the user can set the number of copies to automatically be sent to the printer.
- E. Enter your Smart Gun Options
 - i. Enable/Disable PT-40 Model
 1. This also applies to the PT-2000 model
 - ii. Enable/Disable weather information
 - iii. Enter the directory path for Smart Gun files
 1. This is used with the Datalogic Memor handheld only.
 - a. Generally, this path will be: [\\tsclient\c\interface](#)
 - i. You will need to ensure that the Interface folder exists on the local computer
 - iv. Enter the default rate

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- F. Enter your Order Options
 - i. Enable/Disable whether Bulk Inventory should be reduced from the Current Warehouse. Enable/Disable whether Packaged Goods should be reduced from the Current Warehouse.
 - 1. If disabled, inventory will be reduced from the Delivery Truck
 - ii. Enable/Disable whether Bulk Inventory should be reduced for In-Plant Orders. Enable/Disable whether Packaged Goods inventory should be reduced for In-Plant Orders.
 - iii. Enable/Disable Post-Emergence default.
- G. Require Tender Truck on Order Delivery Receipts
 - i. If enabled, then the users will be prompted to assign a tender truck to all formulated Order Delivery Receipts

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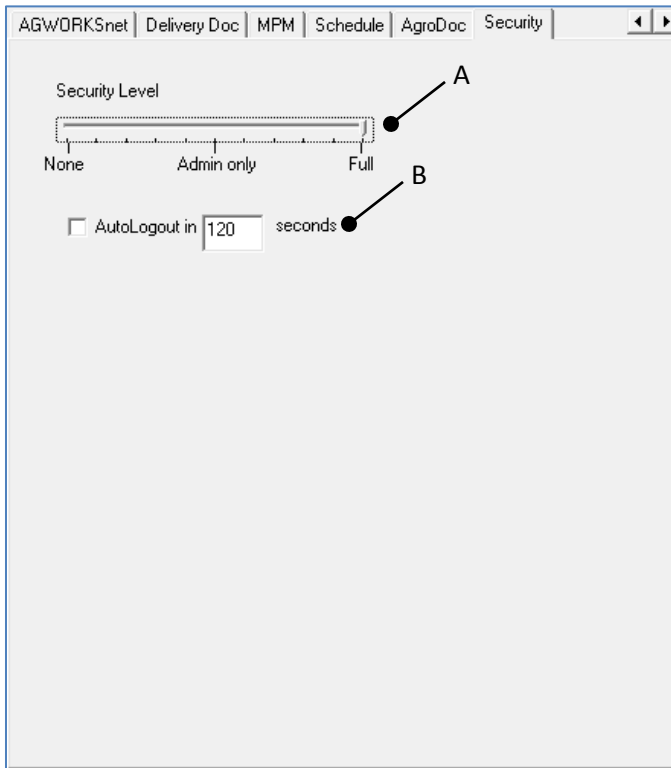
8. On the AgroDoc Tab, enter the information into the appropriate sections below:

The screenshot shows the AgroDoc web interface with the following sections and fields:

- Interface:** AGWDRKSnet | Delivery Doc | MPM | Schedule | AgroDoc | Security
- Credit Department:**
 - Name: AgWorks Credit Department (labeled A)
 - Address: 111 W 76th Street
 - City: Davenport | State: IA | ZIP: 52806
 - Phone: 309.623.4604 | Fax: 563.242.2006
- Crop Season:**
 - Begin: 01/01/2011 | End: 12/31/2011 (labeled B)
- Soiltest Units:**
 - PPM | Lbs/Acre (labeled C)

- A. Enter the Credit Department information
 - i. This will be used on pre-invoices for the *Remit To* address
- B. Enter the Crop Season
- C. Select Soil Test Units
 - i. Either PPM or Lbs/Acre

9. On the Security Tab, enter the information into the appropriate sections below:



- A. Set your Security Level – None or Full
 - i. If set to *None*, users will not be prompted to log in and you will not be able to track who complete what tasks within the software.
 - ii. If set to *Full*, users will be required to log in.
 - B. Set the Auto Logout
 - i. This will determine the number of seconds functionality is available to the user. If the computer is idle for that given period of time, then the user will be required to log back in prior to using the functionality again.
10. When you are completed with your setup, select OK to complete this task.