Procedures for:

Entities

AgWorks pursues a policy of continuous, ongoing development that ensures the highest quality standards combined with advanced, state-of-the-art technology for AgWorks products. For this reason, the features described in this Manual could differ from those in your current work environment.

Please contact AgWorks Support for any clarification needed
at (309) 623-4604, opt. 2 or support@agworks.net.

Revisions:

Version	Date	Author	Description
10.1.24 (124)	7/20/2012	Sara Toliver	Creation of document.

Overview:

The following guide is to assist the user in the task of creating an Entity.

Definitions:
- **Entity:** A group of customers that can pick-up or receive product(s) and/or service(s) under one name (the Entity name).
  - o   Commonly an Entity is a group of farmers that share equipment and perform joint operations. Entity functionality allows such a group to ship products to anyone within the group. After shipments are made, product movement documents are re-allocated to the individual members of the Entity.
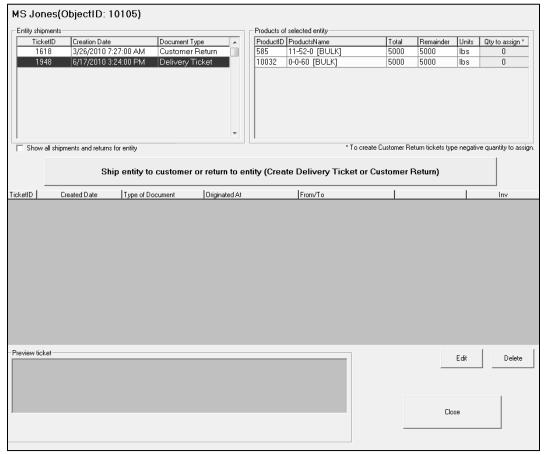
Warning/Notice:
- The following assumes that Entities have already been created.
- Bookings should be made for the individual (not the Entity). When the Delivery Ticket of allocated product(s) from the Entity is created, it will take the booked price from the appropriate Booking if applicable.

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Procedures:
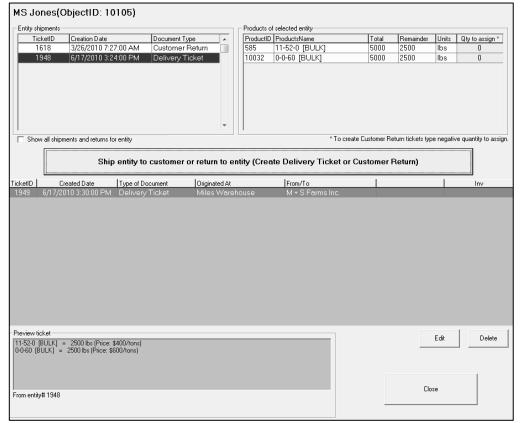1. Within Delivery Doc, navigate to Sales/Deliveries > Add New, select Customer Operations, and then Delivery Ticket.
2. Select the Entity you'd like to create the Entity Delivery Ticket for.
3. Add the appropriate product(s) and/or service(s) to the Entity Delivery Ticket.
4. Click OK to save the Entity Delivery Ticket.
5. After product has been delivered or picked up, you can allocate the product(s) and/or service(s) to the appropriate members of the Entity so that the proper parties will be billed. To do this within Delivery Doc, navigate to Delivery Doc > Sales/Deliveries > Entity Manager.
6. Select the Entity to allocate shipments against.
7. Within the Entity Manager, each shipment for the Entity will be displayed on the top left. On the top right will be all products and quantities delivered to the Entity.

    A.   On the top left section, select the shipment(s) you would like to create an individual Delivery Ticket for.
        i.   To select multiple Delivery Tickets, hold the control key (CTRL) while clicking on the additional tickets.
    B.   On the top right section, enter the quantity of product to assign to the individual of the Entity.

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C. Once you have assigned appropriate quantities, click on "Ship entity to customer or return to entity (Create Delivery Ticket or Customer Return)".

D. Select the individual member of the Entity to allocate product(s) to. This will create a Delivery Ticket for the individual member of the Entity.
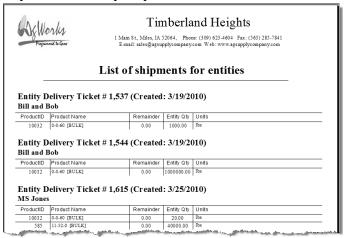

    i. On the top right section, you may notice that the Remainder quantity has automatically been modified to show how much product you have left to allocate to the individual members of the Entity.

8. Click Close to save and complete this task.

    A. If Delivery Tickets are created in the lower half that are should not be created highlight the line item and select Delete.

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Entity Reports:

Within Delivery Doc, navigate to: Sales/Deliveries > Entity Manager, and select Entity Report. Below is an example of each report.

Report of all Entity shipments:

Report of shipments against Entities:

Report of undistributed Entity balances:

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