

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).
 - 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.

AgWorks, Inc.

111 West 76th Street – Davenport, IA 52806

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.

MS Jones(ObjectID: 10105)

Entity shipments			Products of selected entity					
TicketID	Creation Date	Document Type	ProductID	ProductsName	Total	Remainder	Units	Qty to assign *
1618	3/26/2010 7:27:00 AM	Customer Return	585	11-52-0 [BULK]	5000	5000	lbs	0
1948	6/17/2010 3:24:00 PM	Delivery Ticket	10032	0-0-60 [BULK]	5000	5000	lbs	0

Show all shipments and returns for entity * To create Customer Return tickets type negative quantity to assign.

Ship entity to customer or return to entity (Create Delivery Ticket or Customer Return)

TicketID	Created Date	Type of Document	Originated At	From/To	Inv
----------	--------------	------------------	---------------	---------	-----

Preview ticket

- 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.

AgWorks, Inc.

111 West 76th Street – Davenport, IA 52806

- 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.

MS Jones(ObjectID: 10105)

Entity shipments

TicketID	Creation Date	Document Type
1618	3/26/2010 7:27:00 AM	Customer Return
1948	6/17/2010 3:24:00 PM	Delivery Ticket

Products of selected entity

ProductID	ProductsName	Total	Remainder	Units	Qty to assign *
585	11-52-0 [BULK]	5000	2500	lbs	0
10032	0-0-60 [BULK]	5000	2500	lbs	0

Show all shipments and returns for entity * To create Customer Return tickets type negative quantity to assign.

Ship entity to customer or return to entity (Create Delivery Ticket or Customer Return)

TicketID	Created Date	Type of Document	Originated At	From/To	Inv
1948	6/17/2010 3:30:00 PM	Delivery Ticket	Miles Warehouse	M + S Farms Inc.	

Preview ticket

11-52-0 [BULK] = 2500 lbs (Price: \$400/tons)
0-0-60 [BULK] = 2500 lbs (Price: \$600/tons)

From entity# 1948

Edit Delete

Close

- 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.

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:



Timberland Heights
1 Main St., Miles, IA 52064, Phone: (309) 623-4604 Fax: (563) 285-7841
E-mail: sales@agsupplycompany.com Web: www.agsupplycompany.com

List of shipments for entities

Entity Delivery Ticket # 1,537 (Created: 3/19/2010)
Bill and Bob

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	0.00	1000.00	lbs

Entity Delivery Ticket # 1,544 (Created: 3/19/2010)
Bill and Bob

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	0.00	1000000.00	lbs

Entity Delivery Ticket # 1,615 (Created: 3/25/2010)
MS Jones

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	0.00	20.00	lbs
585	11-52-0 [BULK]	0.00	40000.00	lbs

Report of shipments against Entities:




Timberland Heights
1 Main St., Miles, IA 52064, Phone: (309) 623-4604 Fax: (563) 285-7841
E-mail: sales@agsupplycompany.com Web: www.agsupplycompany.com

List of shipments for entity (detailed)

Entity Delivery Ticket # 1,615 (Created: 3/25/2010)
MS Jones

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	0.00	20.00	lbs
	Quantity	TicketID	Category	Customer
	10.00 tons	1,616	Delivery Ticket	J & L Farms
	10.00 tons	1,617	Delivery Ticket	M + S Farms Inc.
585	11-52-0 [BULK]	0.00	40000.00	lbs
	Quantity	TicketID	Category	Customer
	20,000.00 lbs	1,616	Delivery Ticket	J & L Farms
	20,000.00 lbs	1,617	Delivery Ticket	M + S Farms Inc.

Report of undistributed Entity balances:



Timberland Heights
1 Main St., Miles, IA 52064, Phone: (309) 623-4604 Fax: (563) 285-7841
E-mail: sales@agsupplycompany.com Web: www.agsupplycompany.com

List of undistributed balances for entity

Entity Return Ticket # 1,618 (Created: 3/26/2010)
MS Jones

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	10.00	10.00	lbs

Entity Delivery Ticket # 1,948 (Created: 6/17/2010)
MS Jones

ProductID	Product Name	Remainder	Entity Qty	Units
10032	0-0-60 [BULK]	2500.00	5000.00	lbs