

Creating Entities in NexGen® Office

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TOTALLY INTEGRATED SOLUTION

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TABLE OF CONTENTS (CTRL + click to go directly to item)

CREATING ENTITIES IN NEXGEN OFFICE	
Basics Across All Entities	3
Creating a Customer	5
Creating a Location	7
Creating a Group	10
Creating an Ingredient	13
Creating a Service Item	15
Creating a Formula	17
Creating a Contract	
Creating a Grain Bank	23
Creating a Driver	25
Creating a Vendor	



CREATING ENTITIES IN NEXGEN OFFICE

Basics Across All Entities

1. For all entries, before you click "Add," you'll select the site(s) the entity will use if you have multiple sites.

Maintain Custome	ers	
Count: 52	Clear	Fil
🖸 Add		
Edit	r i	022
Set Inactive	ì	039
Lange Alexand		04
View Inactive		10
Site: Commercial N	Aill	112
Site. Commercial M		250

- 2. All entity maintenance windows will have "Add" (to add a new entity), "Edit" (to edit an existing entity), "Set Inactive / Set Active" (to make the selected item inactive or active), and a "View Inactive" checkbox (to see the inactive items along with the active items).
- 3. Most entities will have a "Comments" tab. Select the comments and input comments if required.

Add New Customer		•
Name:	Description:	
Main Details Contact Info Comments Site Access Location Acce	ss Items XRef Assignment Accounting Documents	
Site: Commercial Mill 🗸 Copy		
Order Comments:		
Site Comments:		
This comment will be sent to the batching software.		



4. All entities will have a "Site Access" tab where you'll choose the site(s) being used by the entity if there are multiple sites.

Site Details	Inventory Comments Site Access)
Availa	Description
	Commercial Mill
	Fairmont Mill
	Fertilizer Site
	On Hold

5. All entities will have an "XRef Assignment" tab. You can either input your XRef value for each interfaced program, or you can do all items in the XRef form.

💄 Add New Customer				×			
Name	Der	scription					
Main Details	Contact Info	Comment	Mill Access	1			
Location Access Anima	Il Groups Customer Formulas	Grain Banks Contra	acts Aker Assignment Accounting	-			
XRef Source	Description	Value					
Accounting Export	Accounting Export	101					
Great Plains	Great Plains	101					
AgTrax	AgTrax	1					
QuickBooks	QuidkBooks	8770					
MetaFarms	MetaFarms						
FBS Smartfeeder	FBS Smartfeeder						
Brill Import	Brill Import						
Dalex Import	Dalex Import						
Web Portal - Cattle Integra	Web Portal - Cattle Integrator						
Web Portal - Commercial	Web Portal - Commercial Mill - US						
Web Portal - Commercial Mill	Web Portal - Commercial Mill						
Web Portal - Cooperative	Web Portal - Cooperative						
Vertical GrainTrac	Vertical GrainTrac						
U	Save	Cancel		•			

6. Once everything is set on the entity, click the "Save" button at the bottom.



Creating a Customer

1. Select the "Customers" button.



2. Select the site(s) the customer will use, and press "Add."



- 3. Input the customer name and description.
 - a. If you select requires group or location, orders will not be processed until the corresponding requirements are selected.

🚨 Add New Customer 📃 📼 🖻 🖻
Name: Description:
Main Details Contact Info Comments Site Access Location Access Items XRef Assignment Accounting Documents
Organic SafeGuard Type: Conventional ~
Requires Group:
Requires Location:
Credit Hold:
Dealer:
VFD Acknowledged:

4. Select the "Contact Info" tab and configure the customer's information.

Page new customer			-		1.01
lame:	0	escription	:		
Main Details Contact Info Comments Site Acces	s Location Access	Items X	Ref Assignment	Accounting	Documents
First Name:					
ast Name:					
Address 1:					
ddress 2:					
City:					
Country:					
State/Province:					
Postal Code:					
Phone:					
Nobile:					
ax:					
imail:					
Vebsite:					



- 5. Select and set Comments, Site Access, and Xrefs as required.
- 6. In the "Site Access" tab, also set the price level used by the customer.

📕 Add New (Customer				
Name:					Description:
Main Details	Contact In	fo Comments	Site Acc	ess	S Location Access Items XRef Assignment Accounting Documents
Availa	Name	Price Lev	vel		Pricing Function Variable
	Commerc	10% Margin	\sim		
	Fairmont	10% Margin			

- 7. Select the "Locations" tab, verify the locations are correct and save.
 - a. When you create a new customer, the assigned locations will not display until a location is created and a customer is assigned to that location.

📕 Add New C	lustomer					
Name:					D	escript
Main Details	Contact Info	Comments	Site Access	Location Ad	cess	Items
Location Ac	cess					
Select	Nar	ne	Descr	iption		
	175		175			
	200		200			
	A		A			
	ALBANY MO		ALBANY MO			
	ARMSTRONG	IA	ARMSTRONG	5 IA		
	Appy Croath Lie	umo Cito	Appy Copith I	lomo Cito		

8. If your accounting package is QuickBooks, you can select the "Accounting" tab and import/export your customer.

Add New Customer						
Name			Description			^
Main Detai	s	Contact Info		Comments	Mill A	Access
Location Access	Animal Groups	Customer Formulas	Grain Banks	Contracts	XRef Assignment	Accounting
		Save	Cancel			V



Creating a Location

1. Click on the "Locations" button.



- 2. Select the site(s) using the location and press add.
- 3. Input the name, description, customer, formula, and the other details if being used.

Name:	Location 1					
Description:	Location 1	1	Formula:		-	
Main Details	Address Comments F	eed Line Site A	cess Customer	Access XRef Assignment	Formula Access	Documents
Organic Safe	Guard Type: Conventio	nal 😔				
Barn ID:						
Room ID:						
Pen ID:						
Species:		~				
Warehouse I	For:					
Class:		~				
					ave Cancel	1

4. Select the "Address" tab, input the location details

🛃 Add New Lo	cation					ł			
Name:	Location 1]					^
Description:	Location 1			Formula:		~			
Main Details	Address	Comments	Feed Line	Mill Access	Contracts	Customer Access	XRef Assignment	Formula Access	
Address 1:									
Address 2:									
City:									
State/Province	:		~	•					
Postal Code:									
Phone:									
Mobile:									
Email:									
Website:									
GPS Coordina	ates:								
Latitude:									
Longitude:									
Directions:									
									~
				5	Save (Cancel			



- 5. Select the "Feed Lines" tab, add lines if being used.
 - NOTE location must be saved before creating feed line.

ame: Locatio	sn 1				
escription: Location	<i>i</i> n 1	Formula:	~		
Aain Details Addre	as Comments Feed	d une Mill Access Contracts	Customer Access XRef Assignment	Formula Access	
Add ()	Name	Default Group	Feed Line Active		
Edit .	Feed Line 1				
Set Invettive	0				
View Inactive					

- 6. Select the "Site Access" tab; choose the sites the locations will use.
 - NOTE add mileage if using to calculate fees, add delivery fee if a pricing function isn't used

📕 Edit Lo	cation : Location 1						- O X
Name:	Location 1						
Descripti	on: Location 1	Formula:			~		
Main De	ails Address Comments	Feed Line Site Access Cus	tomer Access XR	ef Assignment F	ormula Access Documents		
Availa	Name	Distance	Delivery Fee	Delivery F	Minimum Delivery Fee	Pricing Function Vari	
	Commercial Mill	0	0	Pounds	0		
	Fairmont Mill	0	0	Pounds	0		
	Fertilizer Site	0	0	Pounds	0		

7. Select the "Customer Access" tab and select the customers that have access to this location (see screenshot on next page).



B Edit Location	: Location 1				- • ×
Name:	ocation 1				
Description: L	ocation 1		Formula:		~
Main D	etails	Address		Comments	Feed Line
Mill Access	Contracts	Customer	Access	XRef Assignment	Formula Access
Availa	Name	Descri	Split C		
	Alexis Sch	Alexis Sch			^
	Ashley Sa	Ashley Sa			
	Bill Wynn	Bill Wynn			
	Brady Ga	Brady Ga			
	Brett Roe	Brett Roe			
	Brighton	Brighton			
	CASH	CASH			
	Chad Curtis	Chad Curtis			
	Chad Penn	Chad Penn			
	Chris & L	Chris & L			
	Chris Gaal	Chris Gaal			
	Chris Potter	Chris Potter			
	Commerc	Commerc			
	Dustin Re	Dustin Re			
	Integrator	Integrator			
	Jayden G	Jayden G			
	Kaleb Stu	Kaleb Stu			~
		Select	All Clea	r All	
		Sav	e Cance	I	



Creating a Group

1. Select the "Group" button.



2. Before creating a new group, you'll want to create a group template.

Add	Name	Description -	Location	Customer	Start Date	Target End Date	Actual End Date	Original Head	Start Weight	End Weight	Phase	Modified	Total Loss	Active	Specie
I Edit.	18WK09SG	18WK09SG	Scott Gieseke Home Site	Scott Gieseke	Mar 5, 2018	Jul 28, 2018	Apr 29, 2019	1,487	25.00	0.00	1		27		Swine
Contractive .	19WK03B1	19WK0381	Kaleb Sturm Home Site	Kaleb Sturm	Jan 18, 2019	Jun 12, 2019	Apr 1, 2019	639	15.00	0.00	3		60		Swine
Dam	19WK07B2	19WK07B2	Kaleb Sturm Home Site	Kaleb Sturm	Feb 13, 2019	Jul 8, 2019	Apr 1, 2019	500	15.00	0.00	2	Ø	20		Swine
Di cross	19WK07B3	19WK07B3	Kaleb Sturm Home Site	Kaleb Sturm	Feb 13, 2019	Jul 8, 2019	Apr 29, 2019	600	15.00	0.00	1		13		Swine
Report	19WK27B1	19WK27B1	Logan Winter Home Site	Logan Winter	Jul 2, 2019	Sep 19, 2019		1,030	12.00	0.00	1		0		Swine
	19WK27B2	19WK27B2	Logan Winter Home Site	Logan Winter	Jul 2, 2019	Sep 19, 2019		1,000	12.00	280.00	1		0		Swine
Movements	19WK27C	19WK27CPB1	Chad Penn Home Site	Chad Penn	Jul 2, 2019	Jul 2, 2019	Jul 3, 2019	500	0.00	0.00	1		0		
O Templates	19WK448P	19WK448P	Brighton Peterson Home Site	Brighton Peterson	n Nov 11, 2019	Nov 12, 2019		500	0.00	0.00	1		450		Dairy
	20WK22B1	20WK22B1	Alexis Schley Home Site	Alexis Schley	Jun 22, 2021	Jun 22, 2021		50	100.00	150.00	1		0		Swine
View Inactive															
Mill: Commercial Mill	Y														

3. Click "Templates." In the template form, press the "ADD" button.

🗘 Add	Name +	Description	Head Count	Start Weight	Location	Customer	Active	Selected	Specie
Edit	Finish	Finish	50	100.00					Swine
O Copy	Standard Wean to Finish	Standard Wean to Fi	1,000	12.00	·				Swine
Set Inactive	Swine F	Swine F	20,000	5.00					Swine
	Weari Finish Gilts	Wean Finish Gilts		15.00					Swine
Template Roll Down Template Swap View Inactive View Unassigned									
Template Roll Down Template Swap View Inactive View Unassigned Mill: Commercial Mill ~									
Template Roll Down Template Swac View Inactive View Unassigned Mill: Commercial Mill >					4				
Template Roll Down Template Swap View Inactive View Unassigned Mill: Commercial Mill >									

4. Input the templates details.





5. Press the "ADD" button and add all phases with the details needed to create the template.

Name:		Description:							
Species:	~	Start Weight:							
Total Head:		0.0 Location:	×						
Units Pou	inds 🔍	Customer:	×				Add New Template Phase		
Organic SafeGua	rd Type: Conventiona	al ~					Main Details		
Phases Mill Ac	cess						Phase #:	1	Insert Phase
C Add	Phase F	ormula Name	Formula Description	Per Head Required	Days	Target Wt.	Formula:		
FAL							Total Head:		
							Qty. Per Head:		
- Linere							Quantity Required:		
							Phase Adjust Limit: Disabled		
							# of Days:		
							Target Weight:		- 14
							Order Comment:		
									-

- 6. Once all phases have been added, select the "Site Access" tab and select the sites needing access and then press "Save."
- 7. On the "Maintain Animal Groups" window, select the site(s) the group will use and press "add."
- 8. Input the group name and description. Select the start date, group template and customer. Update the current phase if required and input the correct total head count.

Add New Animal Group Name: Test Group Description: Test Group Start Date: 9/19/24, 9:31 Group Template: Standard Wean to Finish Start Weight: 12.00 Customer: CASH Remaining Head: 1000 Current Phase: 1 Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Doce Organic SafeGuard Type: Conventional Target End Date: Clear Enterprise/Center: Is Modified: Species: Swine Original Head: 1,000	Add New Animal Group Name: Test Group Description: Test Group Start Date: 9/19/24, 9:31	- 	معا المت عممعا		00 4 03 L		
Name: Test Group Description: Test Group Start Date: 9/19/24, 9:31 ▼ Group Template: Standard Wean to Finish ▼ Start Weight: 12.00 Customer: CASH Remaining Head: 1000 Current Phase: 1 ▼ Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Doct Organic SafeGuard Type: Conventional ▼ Target End Date: 12/7/24, 9:31 ▼ Actual End Date: Enterprise/Center: I Is Modified:	Name: Test Group Description: Test Group Start Date: 9/19/24, 9:31 • Group Template: Standard Wean to Finish • Start Weight: 12:00 Customer: CASH Remaining Head: 1000 Current Phase: 1 • Main Details Location Bins Phases Conventional • Organic SafeGuard Type: Conventional • Clear Actual End Date: 12/7/24, 9:31 • Clear Enterprise/Center: I Image: Swine • Original Head: Original Head: 1,000 Total Loss: 0 End Weight: 0.0.0 Units: Pounds •	🛃 Add New Animal	Group				
Start Date: 9/19/24, 9:31 Group Template: Standard Wean to Finish Start Weight: 12.00 Customer: CASH Remaining Head: 1000 Current Phase: 1 Main Details Location Bins Phases Comments Stef Assignment Group Movements Doct Organic SafeGuard Type: Conventional	Start Date: 9/19/24, 9:31 • Group Template: Standard Wean to Finish • Start Weight: 12:00 Customer: CASH • • • Remaining Head: 1000 Current Phase: 1 • Main Details Location Bins Phases Conventional • Target End Date: 12/7/24, 9:31 • Actual End Date: Clear Enterprise/Center: I Image: Conventional • Clear Species: Swine • Original Head: 1,000 Total Loss: 0 0 End Weight: 0.0 Units: Pounds • Image: Vendes • Image: Vendes •	Name:	Test Group	Description:	Test Group		
Start Weight: 12.00 Customer: CASH Remaining Head: 1000 Current Phase: 1 Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Doct Organic SafeGuard Type: Conventional Target End Date: 12/7/24, 9:31	Start Weight: 12.00 Customer: CASH ~ Remaining Head: 1000 Current Phase: 1 ~ ~ Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Documents Organic SafeGuard Type: Conventional ~	Start Date:	9/19/24, 9:31	Group Template:	Standard Wean to	Finish ~	
Remaining Head: 1000 Current Phase: 1 ~ Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Doct Organic SafeGuard Type: Conventional ~	Remaining Head: 1000 Current Phase: 1 Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Documents Organic SafeGuard Type: Conventional Target End Date: 12/7/24,9:31 Target End Date: 12/7/24,9:31 Clear Enterprise/Center: Clear Is Modified:	Start Weight:	12.00	Customer:	CASH		~
Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Doct Organic SafeGuard Type: Conventional Target End Date: 12/7/24,9:31* Actual End Date: Clear Enterprise/Center: Is Is Modified: Species: Swine Orginal Head:	Main Details Location Bins Phases Comments Site Access XRef Assignment Group Movements Documents Organic SafeGuard Type: Conventional Target End Date: 12/7/24, 9:31 Actual End Date: Clear Enterprise/Center: Species: Swine Clear Species: Swine Clear	Remaining Head:	1000	Current Phase:	1 ~		
Organic SafeGuard Type: Conventional Target End Date: 12/7/24,9:31 Actual End Date: Clear Enterprise/Center: Is Modified: Species: Swine Original Head: 1,000	Organic SafeGuard Type: Conventional Target End Date: 12/7/24, 9:31 Actual End Date: Clear Enterprise/Center: Clear Is Modified: Swine Original Head: 1,000 Total Loss: 0 End Weight: 0.0 Units: Pounds	Main Details Locat	tion Bins Phases Comn	nents Site Access	XRef Assignment Gr	roup Movements	Documents
Target End Date: 12/7/24,9:31 Actual End Date: Clear Enterprise/Center: I Is Modified: Species: Swine Original Head: 1,000	Target End Date: 12/7/24,9:31* Actual End Date: Clear Enterprise/Center: I Is Modified: Swine Original Head: 1.000 Total Loss: 0 End Weight: 0.0 Units: Pounds	Organic SafeGuard	Type: Conventional ~				
Actual End Date: Clear Enterprise/Center: I Is Modified: Species: Swine Original Head: 1,000	Actual End Date: Enterprise/Center: Is Modified: Species: Swine Original Head: 1.000 Total Loss: 0 End Weight: 0.0 Units:	Target End Date:	12/7/24, 9:31	-			
Enterprise/Center: Is Modified: Species: Swine Original Head: 1,000	Enterprise/Center: I Is Modified:	Actual End Date:		Clear			
Is Modified: Species: Swine Original Head: 1,000	Is Modified: Species: Swine Original Head: 1,000 Total Loss: Concentration Official Conc	Enterprise/Center:					
Species: Swine Original Head: 1,000	Species: Swine Original Head: 1,000 Total Loss: 0 End Weight: 0.0 Units: Pounds	Is Modified:					
Original Head: 1,000	Original Head: 1,000 Total Loss: 0 End Weight: 0.0 Units: Pounds	Species:	Swine ~				
	Total Loss: 0 End Weight: 0.0 Units: Pounds	Original Head:	1,00	00			
Total Loss: 0	End Weight: 0.0 Units: Pounds	Total Loss:		0			
End Weight: 0.0	Units: Pounds ~	End Weight:	0	.0			
Units: Pounds ~		Units:	Pounds ~				
					Save	Cancel	



9. Select the "Location Bins" tab, select the location and feed line.

🧾 Add New Anima	l Group						- •
Name:	Test Group	Description:	Test Group				
Start Date:	9/19/24, 9:31	Group Template:	Standard Wean to Finish \checkmark				
Start Weight:	12.00	Customer:	CASH ~				
Remaining Head:	1000	Current Phase:	1 ~				
Main Details Loca	ation Bins Phases Comm	ents Site Access	KRef Assignment Group Movements Documents				
Location: Chad C	Curtis Home Site 🛛 🗸	Q					
Availa	Feed Line 🔻			Availa	Feed Li	Bin	
FL 01					FL 01	FB 01	
					FL 01	FB 02	

10. Select the "Phases" tab and verify the phases are correct.

👂 Add New Anim	nal Group								
Name:	Test Gro	quo	Description:	Test Gro	up				
Start Date:	9/19/	24, 9:31	Group Template:	Standard	d Wean to F	Finish 🗸			
Start Weight:		12.00	Customer:	CASH		~			
Remaining Head:	:	1000	Current Phase:	1 ~					
Main Details Lo	cation Bins	Phases Comm	ents Site Access	XRef Assig	nment Gro	oup Moveme	nts Documents		
Add	Phase	Formula Nam	e Formula Des	cript	Head C	Req Pe	Req Total	Fed Total	Fed Pe
Edit	1	Swine N 1	Swine N 1		1,000	3.00	3,000.00	0.00	0.00
	2	Swine N 2	Swine N2		1,000	10.00	10,000.00	0.00	0.00
	3	Swine N 3	Swine N 3		1,000	20.00	20,000.00	0.00	0.00
Copy	4	Swine N 4	Swine N 4		1,000	40.00	40,000.00	0.00	0.00
	5	Swine N 4	Swine N 4		1,000	50.00	50,000.00	0.00	0.00
	6	Swine F 2	Swine F 2		1,000	100.00	100,000.00	0.00	0.00
Тс	otals:								
						223.00	223,000.00	0.00	0.00



Creating an Ingredient

1. Click the Ingredient button.



- 2. Choose the site(s) the ingredient is going to be used at and click the "Add" button.
- 3. Several steps need to take place in creating an ingredient. Below is a list of the things that will need to be inputted if they are being used:
 - Name, Description, Set ingredient as Active, Site Item, Ingredient Type, Lot Tracking (if required), Cost Method, and Scale Receiving Setup.

Name		D	escription			
ite: Commercial Mill 😔						
Site Details Inventory Comments Site Access XR	ef Assignment Use	er-Defined Assignme	ent Accounting Cust	omers Item Lots	Tags Properties	Documents
Basic Info		Units and Invento	bry			
Active: 🔄 Def. LO Adj.: 🗌		Track Inventor	y: 💙	Lot Tracked:		
Site Item:		Parent Item:				~
Class: Withdrawal Time	:	Selling Units:	Pounds ~	Purchasing Units:	Pounds	~
Costing and Pricing		Reorder Point:	0.0	Pounds		
Cost Method: Market V Zero Price Warnings:	9	Density:	0.0000 🗘	Density Unit:	Pounds/Gallon	~
Features		1				
Receiving	Shipping	Vet Fee	d Directives			
Requires Bin Selection: Requires FSMA:	Scale Weig	hout: VFD R	equired: 🗆			
Received Item:	Organic Safe	e				
	Organic Sa	feGuard Type: Co	nventional 🖂			
Ingredient Settings						
Ing. Type: Bagged Feed						
Pelleting Additive:						
			Save Cancel			

4. Selecting the "Inventory Tab", you'll see Inventory Levels, Inventory Value, Grain Bank Level, Average Cost, Market Cost transactions that have been created for this ingredient. You can also adjust your inventory within this form.

Add New Ingredient								
Name				pesenpaon				
Site: Commercial Mil ~								
Site Details Inventory O	Comments Site Acces	xRef Assignment Us	er-Defined Assignme	ent Accounting	Customers	Hats Tags Properti	ies Docume	nıs
Inventory Level:	0.00 A	verage Cost (\$):	0.00000					
Unit:	Pounds	Market Cost (\$):	0.00000					
Grain Bank Level:	0.00 Inve	ntory Value (\$):	0.00					
Inventory Events				~				
Reload Table with d	late range: 8/19/24	, 12:00 AM 💌 to	9/19/24, 11:59 PM					
ount: 0 Clea	r Filter: Trans. Typ	e v Contains	-					
h. ns. Type	Trans. Date	Adj. Quantity	Market Cost	Unit Cost	Ext. Cost	Transaction N	Vendor	Resulting L vento
			Vot	Adjust Inve	ntory			
				Save Cano	el			



5. Inventory adjustments have several options for the transaction. Input the information required.

Inventory Adjustmen	t					_		
Item: Amm Sulfate				Site:	Comm	iercial Mill		
Purchase	O Increase Decre	ase						
Transaction Date: (09/19/24 09:3		Interfa	ice:			×	
Quantity:	0.0000	Pounds ~	Curren	nt Inve	ntory:			-3,818.73
Received Cost:	0.24000	Specify Unit Cost	Averag	je Cost	t			0.00000
Total Received Cost:	0.00000		Ext. R	eferend	ce:	1		
Current Market Cost:	0.24000	Specify Market Cost	Transa	action#		[
Lot Name:			Vendo	ri:		1		
Lot Expiry Date	09/19/24 09:3 💌	Save Lot Expiry Dat	e					
		6	Save	Car	ncel			

6. Select the "Item Lots" tab. You can view lot details, sequence the lots for usage, and set inactive if needed.

Edit Ingredient : Aun	eo 90											
Name Aureo 90					Descri	Description Aureo 90						
Mill: Commercial Mi	II ~											
Mill Details Inventor	y Comments	XRef Assignment Us	er-Defined Assignment	Accounting Item Lots								
A Move To Top	Seq. #	Lot Name	Beg. Quantity	Current Qty.	Qty. Used	Units	Receipt Date	Condition	Active	Comments	Lot Expiry Date	
🛦 Move Up		INITIAL INVENT	7,526.08	7,521.83	4.25	4.25 Pounds Aug 21, 2020					Not Assigned	
▼ Move Down	2	24907A1	1,000.00	1,000.00	0.00	Pounds	Aug 21, 2020				Not Assigned	
Edit	3	24907A2	1,000.00	1,000.00	0.00	Pounds	Aug 21, 2020				Not Assigned	
Set Inactive	4	123	100.00	100.00	0.00	Pounds	Jun 25, 2021				Not Assigned	
View Inactive												
					Save	Cancel						

7. If your accounting package is QuickBooks, you can select the "Accounting" tab and import/export your ingredient.

Name Amm Sulfate	Description	Amm Sulfate			
ite: Commercial Mil \vee					
Site Details Inventory Comments Site Access XRef Assignment User-Defined Assignment Commercial Mill QB v Import Export	Accounting	Customers Item Lots Tags Properties Documents			



Creating a Service Item

1. Click on the "Service Items" button.



- 2. Choose the site(s) where the service item will be used and click the "Add" button.
- 3. Under "Site Details", input the following items: name, description, class, item type, and price.

colt service item ; su# brown Bag							
Name 50# Brown Bag			Description 50# E	rown Bag			Scan GP
Site: Commercial Mill V							
Site Details Inventory Comments Site Access XRef Ass	ianment User	Defined	Assignment Accourt	ting Item	Lots Documents	Customers	
Basic Info		Units a	nd Inventory				
Active: 🔄 Def. LO Adj.: 🛃	_	Track	Inventory: 🖸		Lot Tracked:		
Class: Withdrawal Time:	0	Sellin	g Units: Each	v	Purchasing Units:	Each 🗸	
Costing and Pricing		Reorde	er Point:	0.000	Each		
Cost Method: Market 🔗 Zero Price Warnings: 🞴		1	Density:	0.0000 ‡	Density Unit:	Pounds/Galon ~	
Features				7			
Receiving	Shipping		Vet Feed Directives				
Requires Bin Selection: 🗌 Requires FSMA: 🗌	Scale Weigh	out: 🗆	VFD Required:				
Received Item: \Box							
Service Item Settings							
Type: Quantity-based 🤟 🧿							
Straight Price: \$ 0.000000 O Price By Price Lev	el						
O Price Across The E	loard						
			Save Cancel	1			

4. Select the Inventory tab to view, void, and adjust service item inventory.

Edit Service Item	: 50# Bro	own Bag								
ame 50# Brown	1 Bag				Descrip	tion 50# Brown	n Bag			Scan GF
e: Commercia te Details Inven	al Mill ~	mments Site	Access	XRef Assignment Us	er-Defined Assignm	ent Accounting	Elem Lots Doc	uments Customers		
nventory Level Unit	:	1.052.00 Each	Aver Mai Invento	rage Cost (\$): rket Cost (\$): ory Value (\$):	0.06491 0.75000 789.00					
Reload Table	with da	te range: 8,	/19/24, 1	12:00 AM 🔻 to 🔄)/19/24, 11:59 PM					
Count: 0	Clear	Filter: Tran	s. Type	~ Contains	~					
Trans. Typ	pe	Trans, D	ate	Adj. Quantity	Market Cost	Unit Cost	Ext. Cost	Transaction N	Vendor	Resulting Invento
-					Vold A	djust Inventory				



5. If your accounting package is QuickBooks, you can select the "Accounting" tab and import/export your service item.

Edit	Service Item : 50#	Brown Bag					- 0 🗙
Name	50# Brown Bag				Description	50# Brown Bag	
Mill:	Commercial Mill	~					
Mill D	etails Inventory	Comments	XRef Assignment	User-Defined Assignment	Accounting	1 Item/Lotz-	
Comm	nercial Mill QB 👻						
Imp	ort						
Exp	ort						
-					1	7	



Creating a Formula

1. Click on the "Formula" button.



- 2. Choose the site(s) using the formula and click on "Add."
- 3. Input the formula name and description.



4. Select the "Formulations" tab. In the bottom half, click the "Add" button and select an ingredient, amount of product, and submit. Follow this procedure until all ingredients have been added to make up the formula.

Curren <u>t</u> Selected Edit	1		9/3	19/2024 09:45:14 AI			N/A	. 10	
Selected Edit									
Edit				🛃 Add Iten	to Formula				
the second se				Item Type:	Ingre	edient	12		
Inactive				Item:			~		
ctive: 🗋				Ouantity:	0.00	a la		_	
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5. If versioning is being used, you can create the new formulation version and select from a current formula or create new.

Name Switer 2				Desc	ription Swir	le F 2			
Site: Commercial Mil	0								
Site Details Comments	Site Access VDof As	innment User-De	fined Assignment Account	ing Formulations C	stomers T		ate		
Last Edited: hu staci	an 10/10/2022 0:23	-22 44	anica Assignment Account	ing romanions co	isconters in	igs Documen	10		
Last Edited: by stack	e on 10/10/2022 9:37	:33 AM							
O Add - New	Versio	Vame	Effective Date	Last Edit	Date	Edited	Active	Curren	
O Copy Current	1	11/	/28/2018 16:31:52 PM	10/10/2022 09:37:	33 AM	stacie		-	
O Conv Selected									
Edit									
Cut									
Set Inactive									
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componenta									
DbA C		Seq. #	Item Desc.	Item T	LO Adj.	Quantity	Units	Total %	
bb <u>A</u> C		Seq. #	Item Desc. Corn Ground 700	Item T Ingredient	LO Adj.	Quantity	Units Pounds	Total %	
DAd C		Seq. #*	Item Desc. Corri Ground 700 Soybean Meal 48% 1240	Item T Ingredient Ingredient	LO Adj.	Quantity 1,400.00 559.00	Units Pounds Pounds	Total % 70% 27.95%	
C Add	Resequent	Seq. #	Item Desc. Corn Ground 700 Soybean Meal 48% 1240 Limestone	Item T Ingredient Ingredient Ingredient	LO Adj.	Quantity 1,400,00 559,00 17,00	Units Pounds Pounds Pounds	Total % 70% 27.95% 0.85%	
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Copy Ecrimite Copy Ecrimite Copy Ecrimite Copy Ecrimite		Seq. # * 10 25 26 31 41 55	Item Desc. Corn Ground 700 Soybean Meal 48% 1240 Umestone Vitamin Pre-Mtx Salt	Item T Ingredient Ingredient Ingredient Ingredient Ingredient	LO Adj.	Quantity 1,400.00 559.00 17.00 7,50 8,00	Units Pounds Pounds Pounds Pounds Pounds	Total % 70% 27.55% 0.85% 0.375% 0.4%	
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Add	···· Resequent	Seq. # A 10 25 31 41 55 61 77 81	Item Desc. Com Ground 200 Soybean Meal 48% 1240 Imestone /tamin Pre-Mox Sat Lysine Dry Thyptophan	Item T Ingredient Ingredient Ingredient Ingredient Ingredient Ingredient Ingredient	LO Adj.	Quantity 1,400.00 559.00 17.00 7.50 8.00 4,00 1.00 0,550	Units Pounds Pounds Pounds Pounds Pounds Pounds Pounds Pounds	Total % 70% 27.95% 0.85% 0.37% 0.37% 0.37% 0.2% 0.05%	

6. Select the "Site Details" tab and configure the settings required.

📕 Edit Formula : Swine F 2	
Name Swine F 2	Description Swine F 2
Site: Commercial Mill ~	
Site Details Comments Site Access XRef Assignment User-Defined Ass	ignment Accounting Formulations Customers Tags Documents
Basic Info	Units and Inventory
Active: 🗹 Def. LO Adj.: 🗌	Selling Units: Pounds Vurchasing Units: Pounds V
Site Item: Swine F 2	Density: 0.0000 💌 Density Unit: Pounds/Gallon 🗸
Class: SWINE Withdrawal Time: 0	
Costing and Pricing Cost Method: Market V Zero Price Warnings:	
Organic Safe Organic SafeGuard Type:	
Formula Settings	
Pelleting: Packaged:	Pricing Settings
Dropship Export As Ingredient: Disallow Modifications: D	Guaranteed: U Price By Formula: U
Mixer Batch Size: 0.00 0 Pounds ~	Pricing Method: Use Site Default
Restock Item:	✓ Set Item Cost Formula Markup: 6.000000 Per Tons ✓
Formulate By: Weight \checkmark	Price Level:
	Save Cancel Update Site Formulations & Save



7. If your accounting package is QuickBooks, you can select the "Accounting" tab and import/export your formulation.





Creating a Contract

1. Click on the "Contracts" button.



- 2. Choose the site(s) where the contract will be assessed and click the "Add" button.
- 3. Input the contract info: name, description, price, units of measure, contract type, use price and the quantity details.

Add New Contract	
Name:	Description:
Price (\$) : 0.000000	Units: Pounds
Contract Type: By Quantity ~	Special Use Conditions
Priority:	Price Of (\$) : 0.000000 ?
	● Not Used Use Above
	○ Use Above or Equal ○ Use Below or Equal
Quantity Details	Date Details
Quantity: 0.000000	Effective Date: 9/19/24
Warning Level: 0.000000	Expiration Date: 9/19/24
Remaining:	
Pompineg:	
Contract Bry	
Contract By	
Customer C Animar Group C Eccation	
Site Access Items Customers Animal Group	Locations Transactions XRef Assignment Documents
Availa Description	
Commercial Mill	
E Fairmont Mill	
Fertilizer Site	
On Hold	
Stacie	
TM Test	
Welcome Mill	
You may change priorities by dragging & drop	ping the appropriate rows.
	Select All Clear All
	Save Cancel Save/Print



- 4. Select "Contract By" and choose customer, animal group, or location.
 - Once "contract by" is selected. Add customer(s), animal group(s), or location(s) from the left. To do this click on 'Customer 1' to highlight the line then select 'Add' in the middle column.

Name:		Description:
Price (\$) :	0.000000	Uniter December 1
Contract Type:	By Quantity	V Lice Drice
Priority:		
		Not Used O Use Above O Use Below
From Accounting		O Use Above or Equal O Use Below or Equal
Quantity Details		Date Details
Quantity:	0.000000	Effective Date: 7/9/21
Warning Level:	0.000000	Expiration Date: 7/9/21
Description		
Remaining:		
Remaining:	0%	
Customer (Mill Access Ite	Animal Group O1 act	tor
Customer (Mill Access Ite	Animal Group OL at	ton Store Understanding Transactions XRef Assignment
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5. Select the "Items" tab and choose the ingredient, formula or service item that is affected.

Name:		Description:
Price (5) :	0.000000	livites Dounde vi
Contract Type:	By Quantity	V Use Price
riority:		
man city c		
		Not Used Use Above Use Below
rom Accounting:		Use Above or Equal Use Below or Equal
Quantity Details		Date Details
Quantity:	0.000000	Effective Date: 7/9/21
Warning Level:	0.000000	Expiration Date: 7/9/21
Remaining:		
Remaining:	0%	
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6. Under the "Transaction" tab, you will find the transaction for the contract.

Name: Description: Price (\$): 0.00000 Units: Pounds Contract Type: By Quantity Price (\$): Description:	^
Price (\$): 0.000000 Units: Pounds Contract Type: By Quantity Use Price Priority: Price Of (6): 0.000000	
Contract Type: By Quantity Use Price	
Priority:	
Not Used Use Above Use Below	
From Accounting:	
Cuantity Details	
Quantity: 0.000000 Effective Date: 7/9/21	
Warning Level: 0.000000 Expiration Date: 7/9/21	
Remaining:	
Remaining: 0%	
Contract By:	
Customer Animal Group Clocation	
Mill Access Items Oustomers Animal Groups Locations Transactions YRef Assignment	
Mill Item Unit Price Quantity Transaction Date	
This Kein one free Quantity fransaction bate	
Save Cancel Save/Print	v



Creating a Grain Bank



- 1. Click on the "Grain Bank" button.
- 2. Choose the site(s) using the Grain bank and click the "Add" button.
- 3. Input the Grain Bank name, description, item, effective date, and quantity.

Name:		Item:	
Description:		Units:	Pounds v
Quantity Details Quantity:			Special Use Conditions Cost Limit Of (\$): 0.000000
Qty. Remaining:	0	Adjust	Not Used Use Below Use Above Use Above or Equal
Remaining:			Effective Date: 9/19/24, 9:54
Main Details Transact	ions XRef Assign	nment S	ite Access Customers Documents
Unit Cost:	0.000000		
Base Unit Price:	0.000000		

4. Select the "Customers" tab and choose the customer(s) using the Grain Bank.

📕 Add New Grain Bank		3
Name: Item:	~	
Description: Units:	Pounds	
Quantity Details	Special Use Conditions	
Quantity:	Cost Limit Of (\$) : 0.000000	
Qty. Remaining: 0 Adjust	● Not Used ○ Use Below ○ Use Above	
Warning Level: 0	○ Use Below or Equal ○ Use Above or Equal	
Remaining:	Effective Date: 9/19/24, 9:54 💌	
Main Details Transactions XRef Assignment	Site Access Customers Documents	
Available Customers	Assigned Customers	
Brady Gaalswyk	Add All ►►	
Brett Roe	Add >>	
	I Remove	
CASH		
Cavman Creek Farms	A A Remove All	
Chad Curtis		
Chad Penn		
Chris Gaalswyk		
Chris Potter	1	



5. Within the "Transactions" tab, you will find the transactions that affect the Grain Bank.

ame:	Item:	1	~						
escription:	Units:		~						
Quantity Details Quantity: Qty. Remaining: Warning Level: Remaining:	0 Adast	Cost Limit Of (\$) Not Used Effective Date:	: 0 O Use Be O Use Be 7/9/21	0.000000 How (How or Equal (1, 3:27 PM) Use Above) Use Above	or Equal			
lain Details Transa	ections XRef Assignment Mill A	ccess Customers							
Customer	Order # / Line #	Seq. #	Date	Quantity	Units	Animal Group	Location	Invoice Corrected	
Customer	Order # / Line #	Seq. #	Date	Quantity	Units	Animal Group	Location	Invoice Corrected	



Creating a Driver

1. Go to "Maintain" and then "Drivers."



- 2. Press the "Add" button.
- 3. Input the driver information, make active, click on "Carrier" tab if needed and select appropriate carrier, and press "Save."

📕 Add New D)river					
Name: Drive	er			Description:	Driver	1
Main Details	Site Access	Carriers	Documents			
Active:						
First Name:	Driver					
Last Name:	2					
Comments:	Blue Truc	k				
						1
			<u>Save</u>	ancel		



Creating a Vendor

1. Go to "Maintain" and then "Vendors."



2. Input the vendors information.

Name:		Description:	
Main Details Site	Access XRef Assignment Docume	nts	
Settings	Type O Vendor () Carrier () Both		
Split Vendor	0		
Requires PO	0		
Default Shipp	ber Weight		
DOT Number:			
Contact Info			
Contact:			
Address 1:			
Address 2:			
City:			
State/Province:	~		
Postal Code:			
Phone:			
Fax:			
Email:			



-- END OF USER GUIDE--

The purchase and use of Easy Automation products and services are subject to Easy Automation's current Terms and Conditions which can be found at <u>www.easy-automation.com/terms</u>.