



WHERE MATCHLESS SERVICE MEETS
PRACTICAL ENGINEERING FOR
EXCEPTIONAL SOLUTIONS.

Creating Entities in NexGen[®] Office

Easy Automation, Inc. User Guide
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TOTALLY INTEGRATED SOLUTION

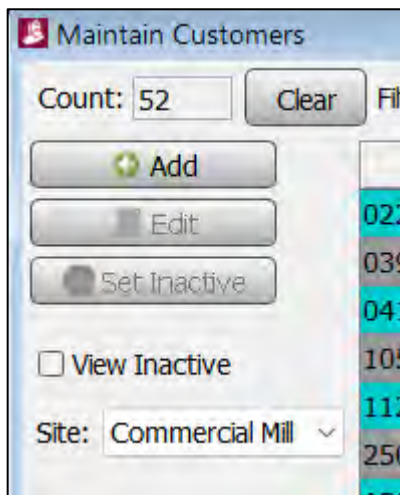
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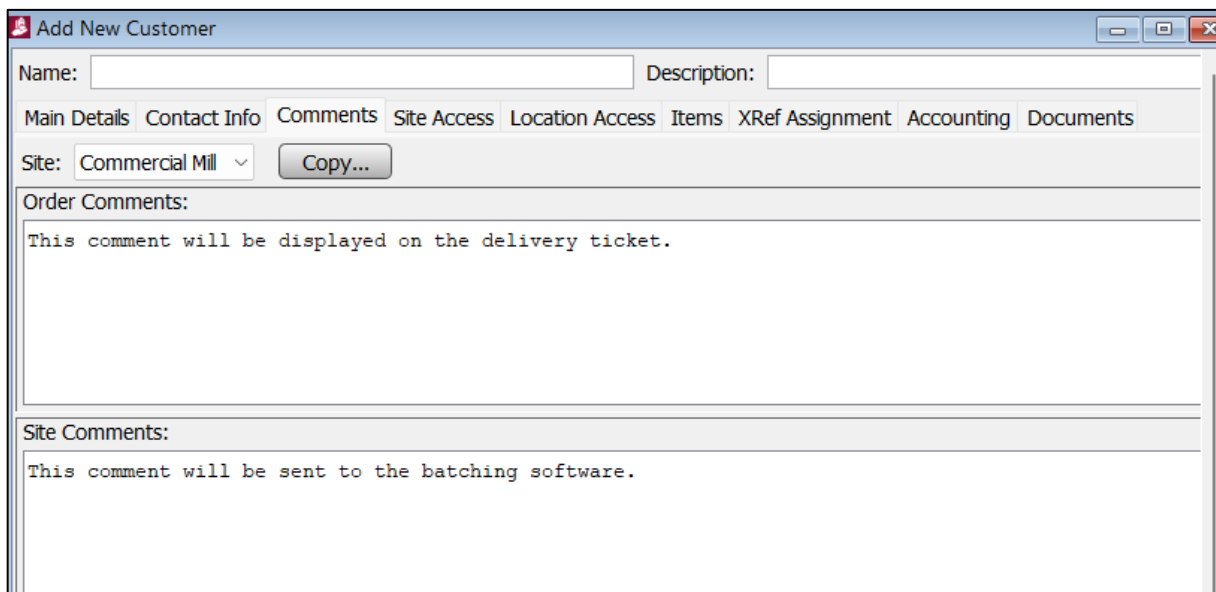
CREATING ENTITIES IN NEXGEN OFFICE

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.



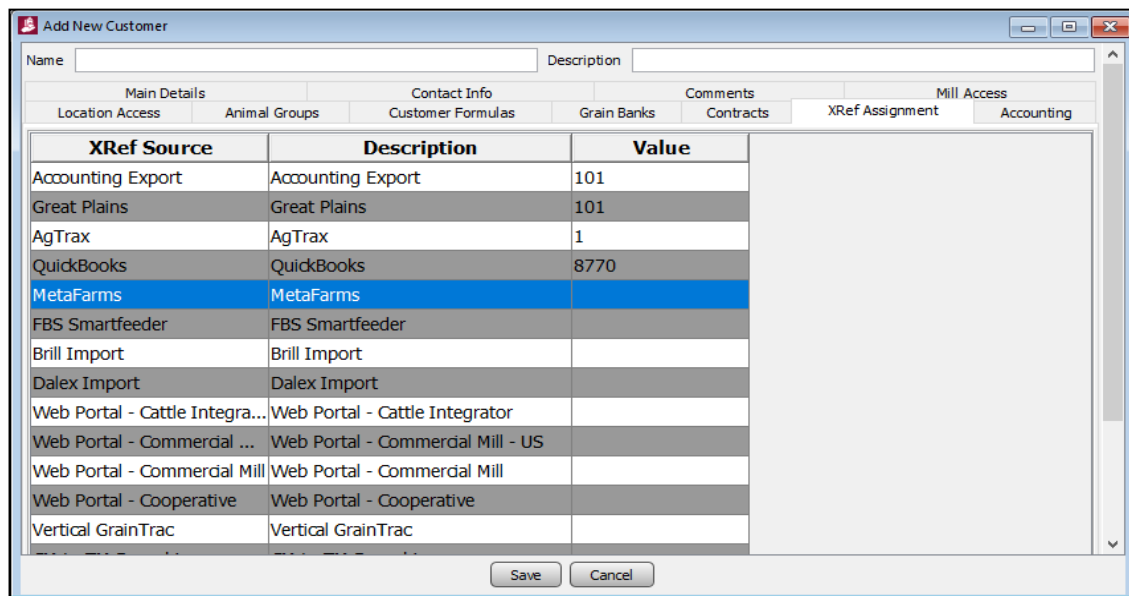
2. All entity maintenance windows will have “Add” (to add a new entity), “Edit” (to edit an existing entity), “Set Inactive / Set Active” (to make the selected item inactive or active), and a “View Inactive” checkbox (to see the inactive items along with the active items).
3. Most entities will have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



- 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			
<input checked="" type="checkbox"/>	Commercial Mill			
<input type="checkbox"/>	Fairmont Mill			
<input type="checkbox"/>	Fertilizer Site			
<input type="checkbox"/>	On Hold			

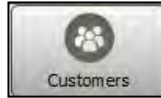
- All entities will have an “XRef Assignment” tab. You can either input your XRef value for each interfaced program, or you can do all items in the XRef form.



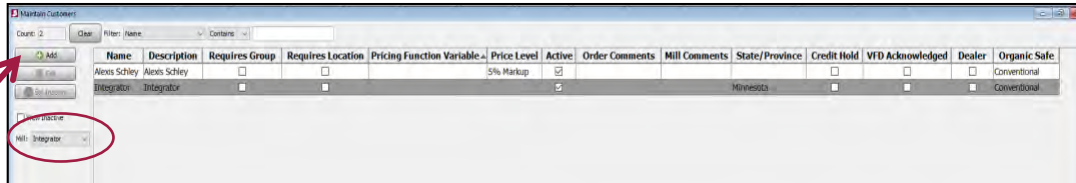
XRef Source	Description	Value
Accounting Export	Accounting Export	101
Great Plains	Great Plains	101
AgTrax	AgTrax	1
QuickBooks	QuickBooks	8770
MetaFarms	MetaFarms	
FBS Smartfeeder	FBS Smartfeeder	
Brill Import	Brill Import	
Dalex Import	Dalex Import	
Web Portal - Cattle Integra...	Web Portal - Cattle 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	

- Once everything is set on the entity, click the “Save” button at the bottom.

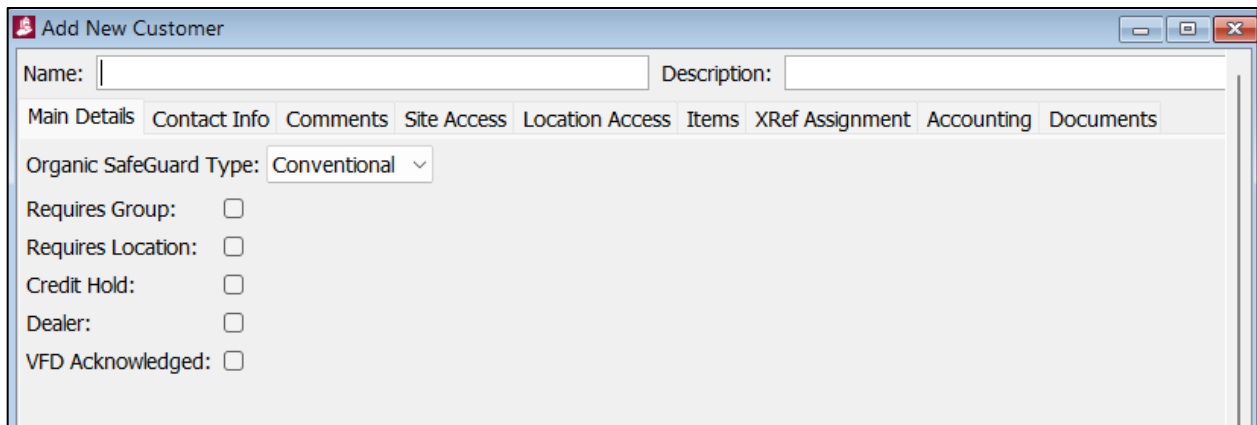
Creating a Customer



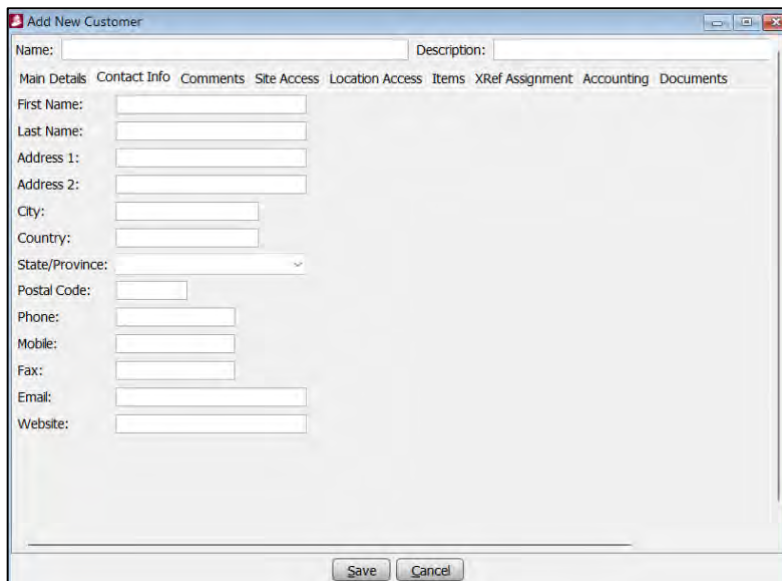
1. Select the “Customers” button.
2. Select the site(s) the customer will use, and press “Add.”



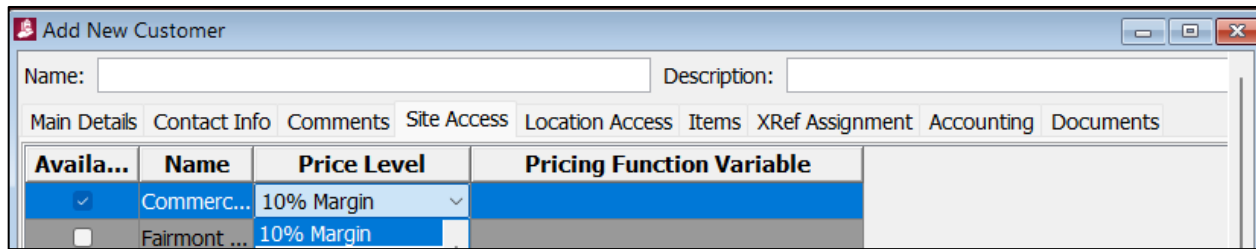
3. Input the customer name and description.
 - a. If you select requires group or location, orders will not be processed until the corresponding requirements are selected.



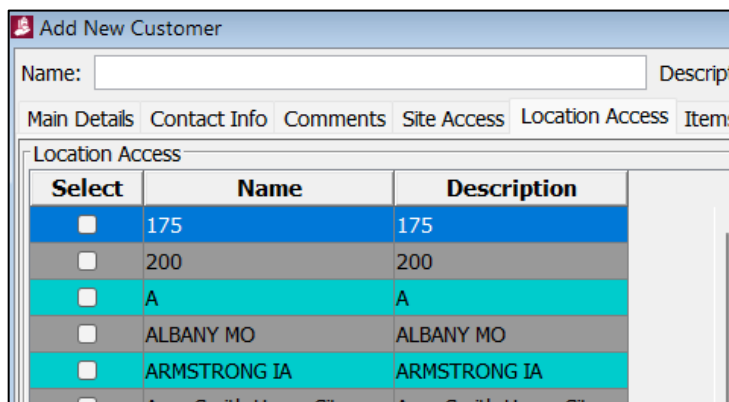
4. Select the “Contact Info” tab and configure the customer’s information.



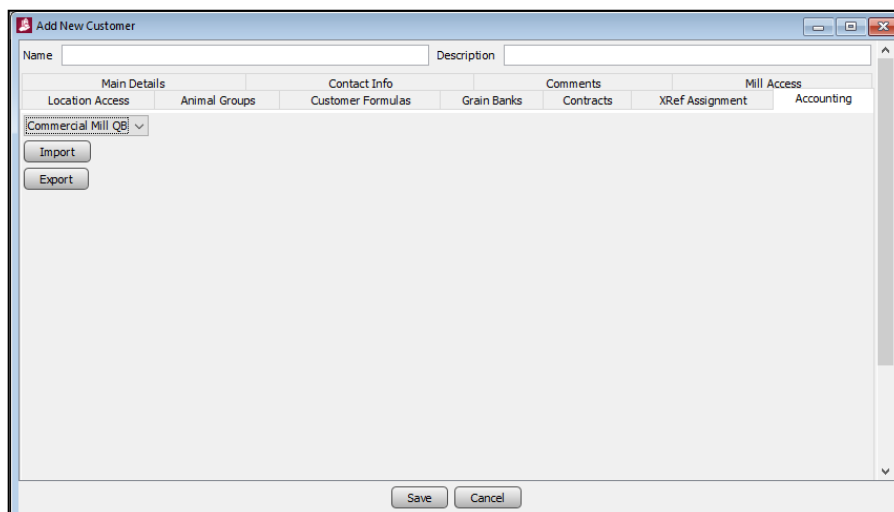
5. Select and set Comments, Site Access, and Xrefs as required.
6. In the “Site Access” tab, also set the price level used by the customer.



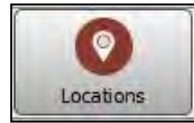
7. Select the “Locations” tab, verify the locations are correct and save.
 - a. When you create a new customer, the assigned locations will not display until a location is created and a customer is assigned to that location.



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



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.

Add New Location

Name:

Description: Formula:

Main Details | Address | Comments | Feed Line | Site Access | Customer Access | XRef Assignment | Formula Access | Documents

Organic Safeguard Type:

Barn ID:

Room ID:

Pen ID:

Species:

Warehouse For:

Class:

Require Group:

4. Select the “Address” tab, input the location details

Add New Location

Name:

Description: 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:

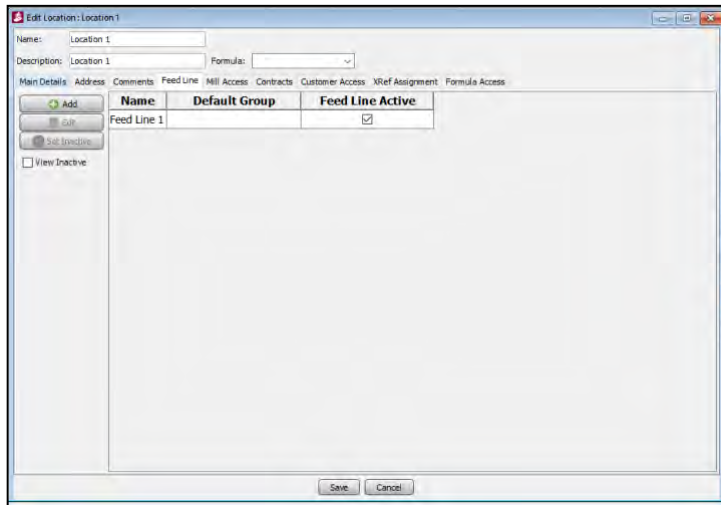
GPS Coordinates:

Latitude:

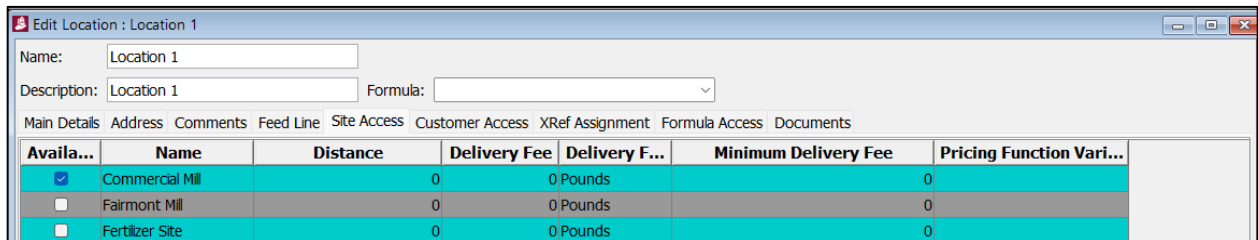
Longitude:

Directions:

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



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



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

Edit Location : Location 1

Name:

Description: Formula:

Main Details
 Address
 Comments
 Feed Line
 Mill Access
 Contracts
 Customer Access
 XRef Assignment
 Formula Access

Availa...	Name	Descri...	Split C...
<input type="checkbox"/>	Alexis Sch...	Alexis Sch...	<input type="checkbox"/>
<input type="checkbox"/>	Ashley Sa...	Ashley Sa...	<input type="checkbox"/>
<input type="checkbox"/>	Bill Wynn	Bill Wynn	<input type="checkbox"/>
<input type="checkbox"/>	Brady Ga...	Brady Ga...	<input type="checkbox"/>
<input type="checkbox"/>	Brett Roe	Brett Roe	<input type="checkbox"/>
<input type="checkbox"/>	Brighton ...	Brighton ...	<input type="checkbox"/>
<input type="checkbox"/>	CASH	CASH	<input type="checkbox"/>
<input type="checkbox"/>	Chad Curtis	Chad Curtis	<input type="checkbox"/>
<input type="checkbox"/>	Chad Penn	Chad Penn	<input type="checkbox"/>
<input type="checkbox"/>	Chris & L...	Chris & L...	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chris Gaal...	Chris Gaal...	<input type="checkbox"/>
<input type="checkbox"/>	Chris Potter	Chris Potter	<input type="checkbox"/>
<input type="checkbox"/>	Commerc...	Commerc...	<input type="checkbox"/>
<input type="checkbox"/>	Dustin Re...	Dustin Re...	<input type="checkbox"/>
<input type="checkbox"/>	Integrator	Integrator	<input type="checkbox"/>
<input type="checkbox"/>	Jayden G...	Jayden G...	<input type="checkbox"/>
<input type="checkbox"/>	Kaleb Stu...	Kaleb Stu...	<input type="checkbox"/>

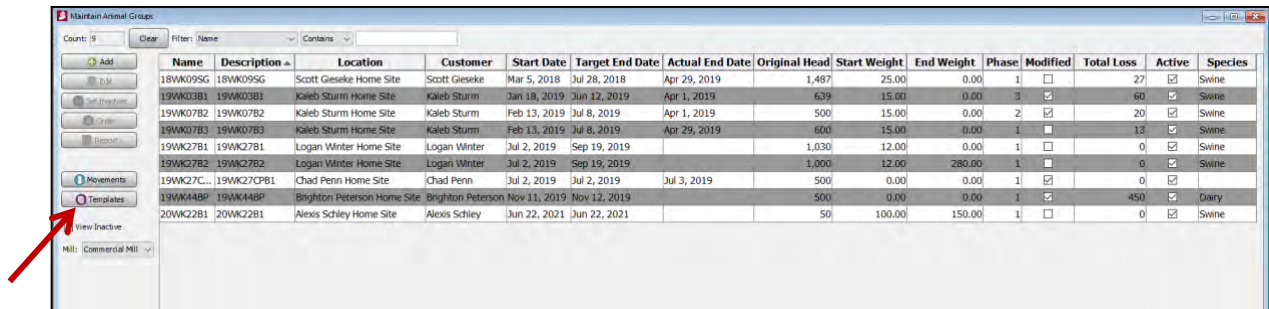
8. Select and set Comments, Site Access, and Xrefs as required.

Creating a Group

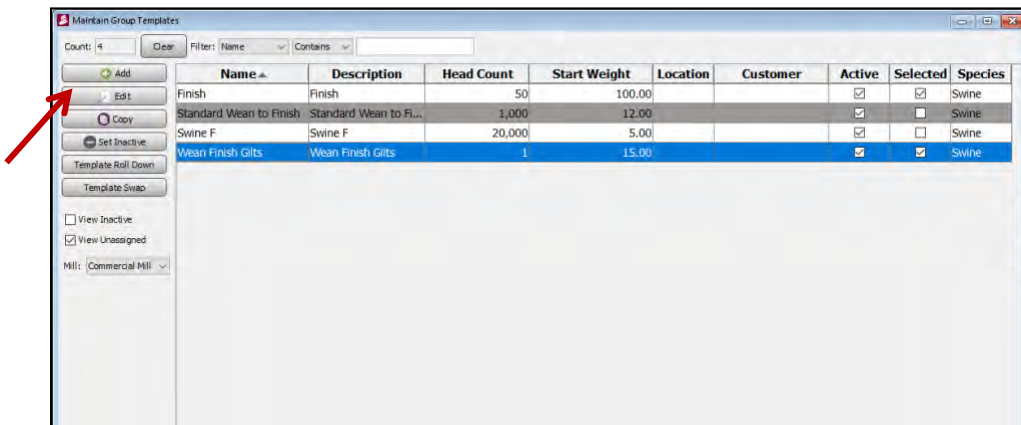
1. Select the “Group” button.



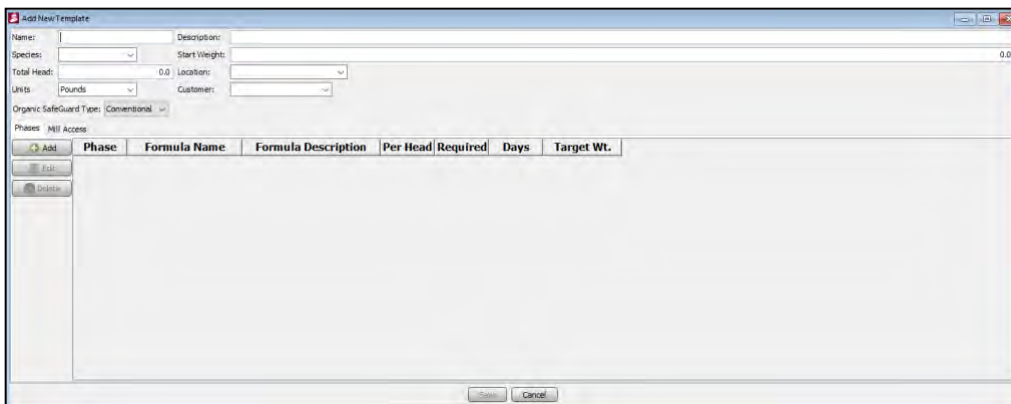
2. Before creating a new group, you’ll want to create a group template.



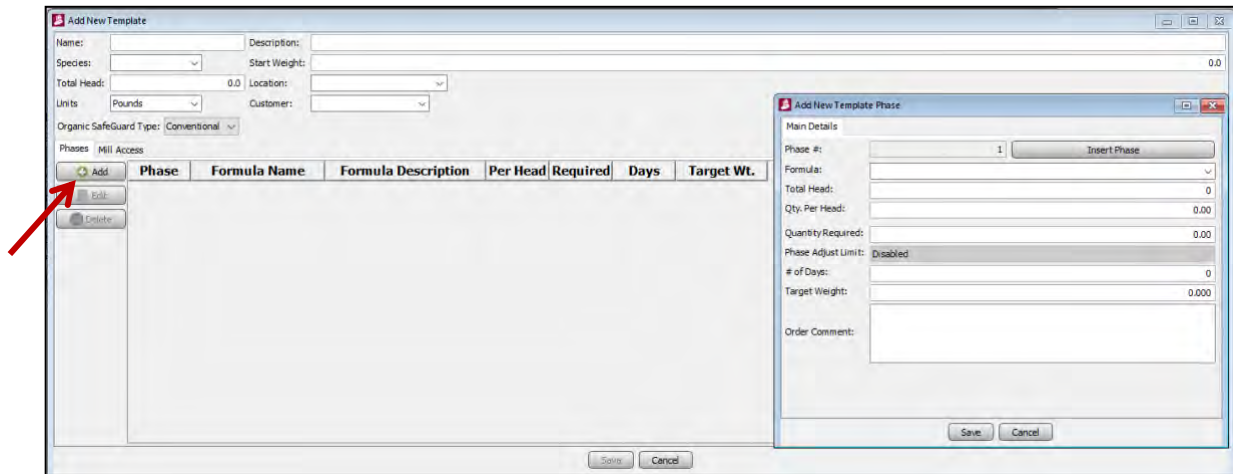
3. Click “Templates.” In the template form, press the “ADD” button.



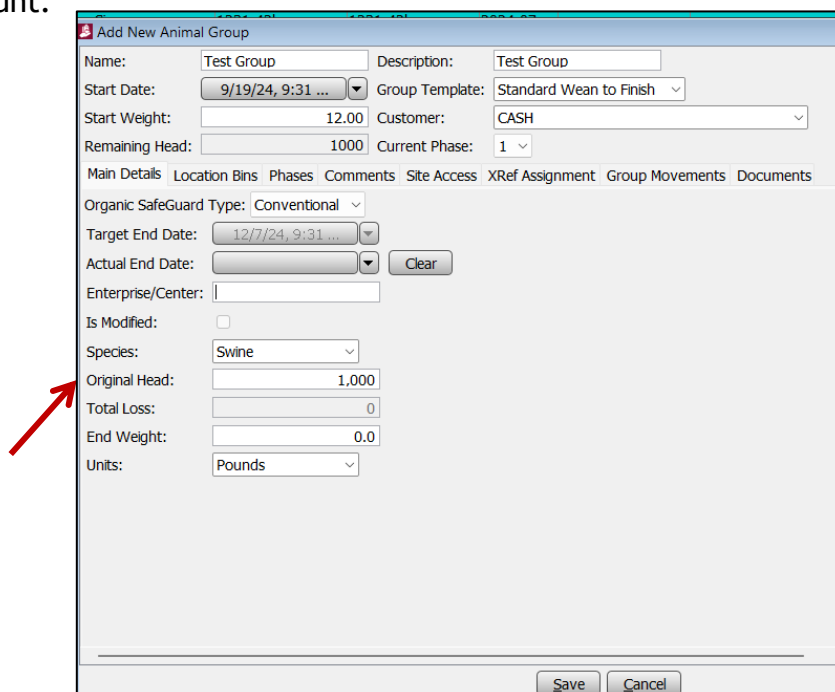
4. Input the templates details.



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



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.



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

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 Documents

Location: Chad Curtis Home Site

Availa...	Feed Line	Bin
<input checked="" type="checkbox"/>	FL 01	

Availa...	Feed Li...	Bin
<input checked="" type="checkbox"/>	FL 01	FB 01
<input checked="" type="checkbox"/>	FL 01	FB 02

10. Select the “Phases” tab and verify the phases are correct.

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 Documents

Phase	Formula Name	Formula Descript...	Head C...	Req Pe...	Req Total	Fed Total	Fed Pe...	
1 Swine N 1	Swine N 1	Swine N 1	1,000	3.00	3,000.00	0.00	0.00	
2 Swine N 2	Swine N 2	Swine N 2	1,000	10.00	10,000.00	0.00	0.00	
3 Swine N 3	Swine N 3	Swine N 3	1,000	20.00	20,000.00	0.00	0.00	
4 Swine N 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	Swine N 4	1,000	50.00	50,000.00	0.00	0.00	
6 Swine F 2	Swine F 2	Swine F 2	1,000	100.00	100,000.00	0.00	0.00	
Totals:					223.00	223,000.00	0.00	0.00

11. Select and set Comments, Site Access, and Xrefs as required.

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.*

The screenshot shows the 'Add New Ingredient' form with the following sections:

- Name:** [Text Field] **Description:** [Text Field]
- Site:** Commercial Mill
- Basic Info:**
 - Active: Def. LO Adj.:
 - Site Item: [Text Field]
 - Class: [Text Field] Withdrawal Time: [Text Field]
- Units and Inventory:**
 - Track Inventory: Lot Tracked:
 - Parent Item: [Dropdown]
 - Selling Units: Pounds Purchasing Units: Pounds
 - Reorder Point: 0.0 Pounds
 - Density: 0.0000 Density Unit: Pounds/Gallon
- Costing and Pricing:**
 - Cost Method: Market Zero Price Warnings:
- Features:**
 - Receiving:** Requires Bin Selection: Requires FSMA: Received Item:
 - Shipping:** Scale Weighout:
 - Vet Feed Directives:** VFD Required:
 - Organic Safe:** Organic SafeGuard Type: Conventional
- Ingredient Settings:**
 - Ing. Type: Bagged Feed
 - Pelleting Additive:

Buttons: Save, Cancel

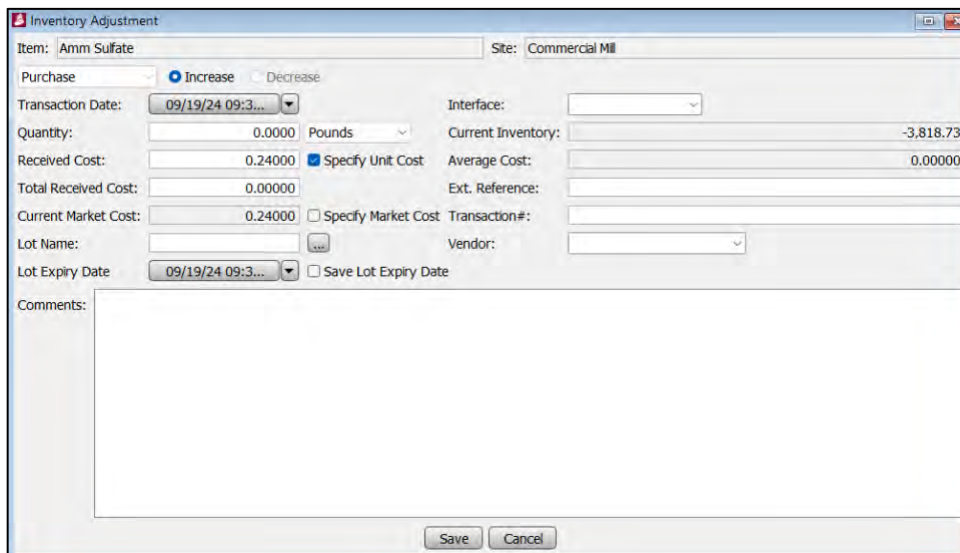
4. Selecting the “Inventory Tab”, you’ll see Inventory Levels, Inventory Value, Grain Bank Level, Average Cost, Market Cost transactions that have been created for this ingredient. You can also adjust your inventory within this form.

The screenshot shows the 'Add New Ingredient' form with the 'Inventory' tab selected. A red circle highlights the following fields:

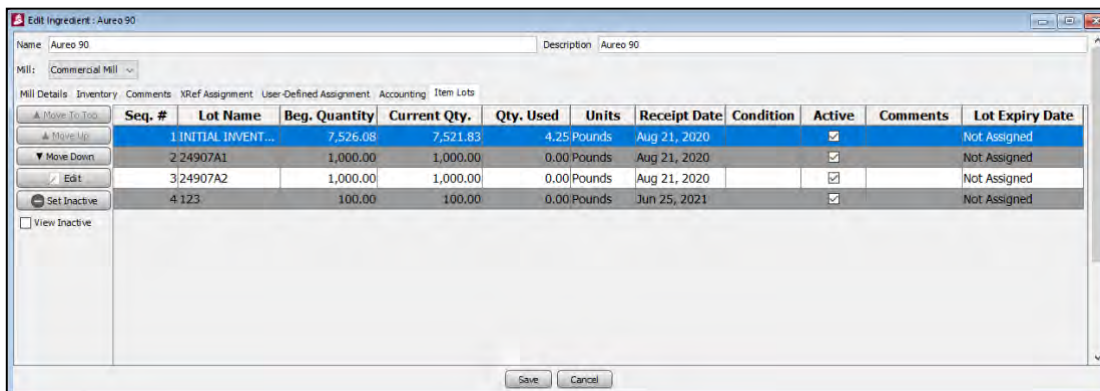
- Inventory Level: 0.00
- Average Cost (\$): 0.00000
- Unit: Pounds
- Market Cost (\$): 0.00000
- Grain Bank Level: 0.00
- Inventory Value (\$): 0.00

Below these fields is the 'Inventory Events' section with a 'Reload Table' button and a date range filter (8/19/24, 12:00 AM to 9/19/24, 11:59 PM). A table with columns: Trans. Type, Trans. Date, Adj. Quantity, Market Cost, Unit Cost, Ext. Cost, Transaction N..., Vendor, Resulting Inventory... is visible. At the bottom, there is an 'Adjust Inventory' button with a red arrow pointing to it, and 'Save' and 'Cancel' buttons.

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

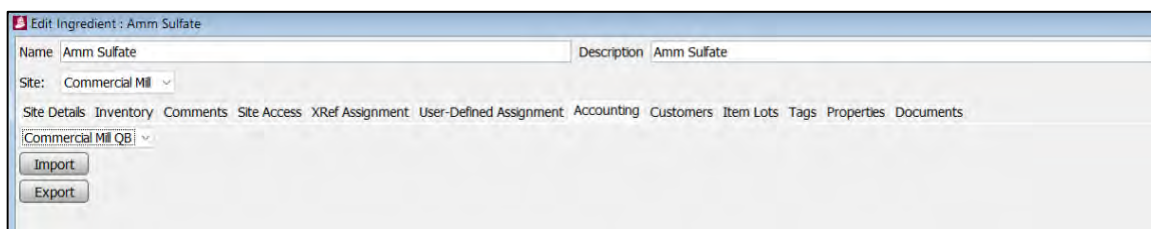


- Select the “Item Lots” tab. You can view lot details, sequence the lots for usage, and set inactive if needed.



Seq. #	Lot Name	Beg. Quantity	Current Qty.	Qty. Used	Units	Receipt Date	Condition	Active	Comments	Lot Expiry Date
1	INITIAL INVENT...	7,526.08	7,521.83	4.25	Pounds	Aug 21, 2020		<input checked="" type="checkbox"/>		Not Assigned
2	24907A1	1,000.00	1,000.00	0.00	Pounds	Aug 21, 2020		<input checked="" type="checkbox"/>		Not Assigned
3	24907A2	1,000.00	1,000.00	0.00	Pounds	Aug 21, 2020		<input checked="" type="checkbox"/>		Not Assigned
4	123	100.00	100.00	0.00	Pounds	Jun 25, 2021		<input checked="" type="checkbox"/>		Not Assigned

- If your accounting package is QuickBooks, you can select the “Accounting” tab and import/export your ingredient.



- Select and set Comments, Site Access, and Xrefs as required.

Creating a Service Item



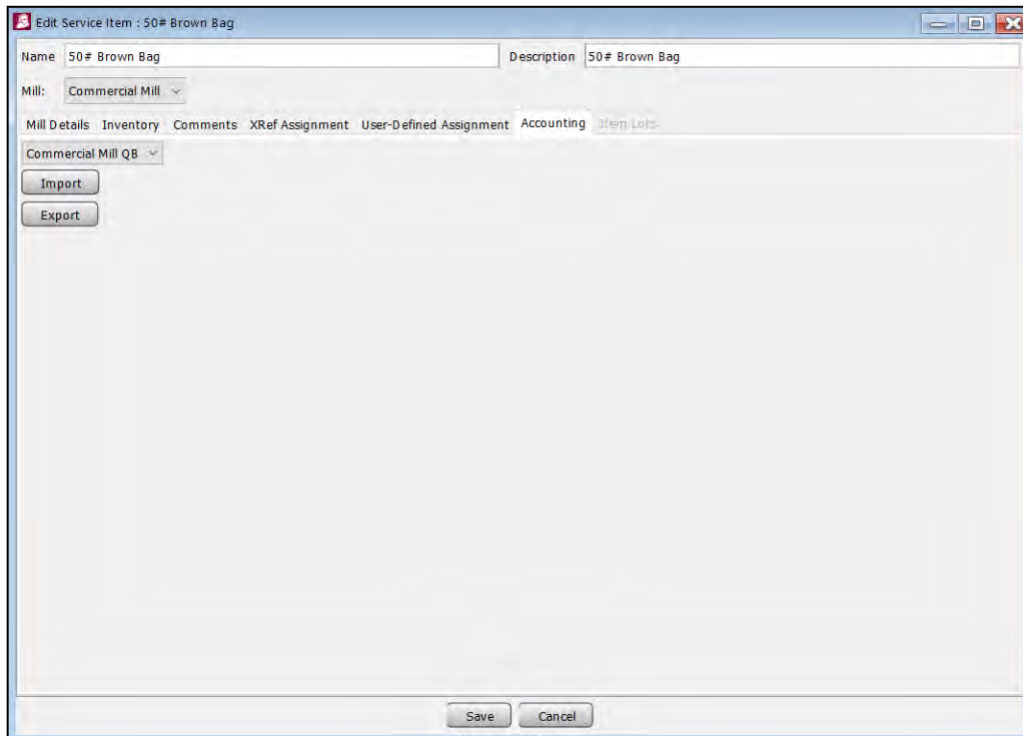
1. Click on the “Service Items” button.
2. Choose the site(s) where the service item will be used and click the “Add” button.
3. Under “Site Details”, input the following items: name, description, class, item type, and price.

The screenshot shows the 'Edit Service Item' window for '50# Brown Bag'. The 'Basic Info' section includes fields for Name, Description, Site, Class, and Withdrawal Time. The 'Units and Inventory' section includes checkboxes for Track Inventory and Lot Tracked, and dropdowns for Selling and Purchasing Units. The 'Costing and Pricing' section includes Cost Method and Zero Price Warnings. The 'Features' section includes checkboxes for Requires Bin Selection, Requires FSMA, Received Item, Shipping Scale Weighout, and Vet Feed Directives VFD Required. The 'Service Item Settings' section includes a dropdown for Type and radio buttons for Price By Price Level and Price Across The Board.

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

The screenshot shows the 'Edit Service Item' window for '50# Brown Bag' with the 'Inventory' tab selected. It displays Inventory Level (1,052.00), Average Cost (\$), Market Cost (\$), and Inventory Value (\$). Below this is the 'Inventory Events' section with a 'Reload Table' button and a date range filter. At the bottom, there is a table with columns: Trans. Type, Trans. Date, Adj. Quantity, Market Cost, Unit Cost, Ext. Cost, Transaction N..., Vendor, and Resulting Invento... The table is currently empty. Buttons for 'Void', 'Adjust Inventory', 'Save', and 'Cancel' are visible at the bottom.

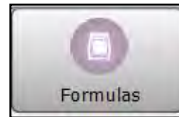
5. If your accounting package is QuickBooks, you can select the “Accounting” tab and import/export your service item.



6. Select and set Comments, Site Access, and Xrefs as required.

Creating a Formula

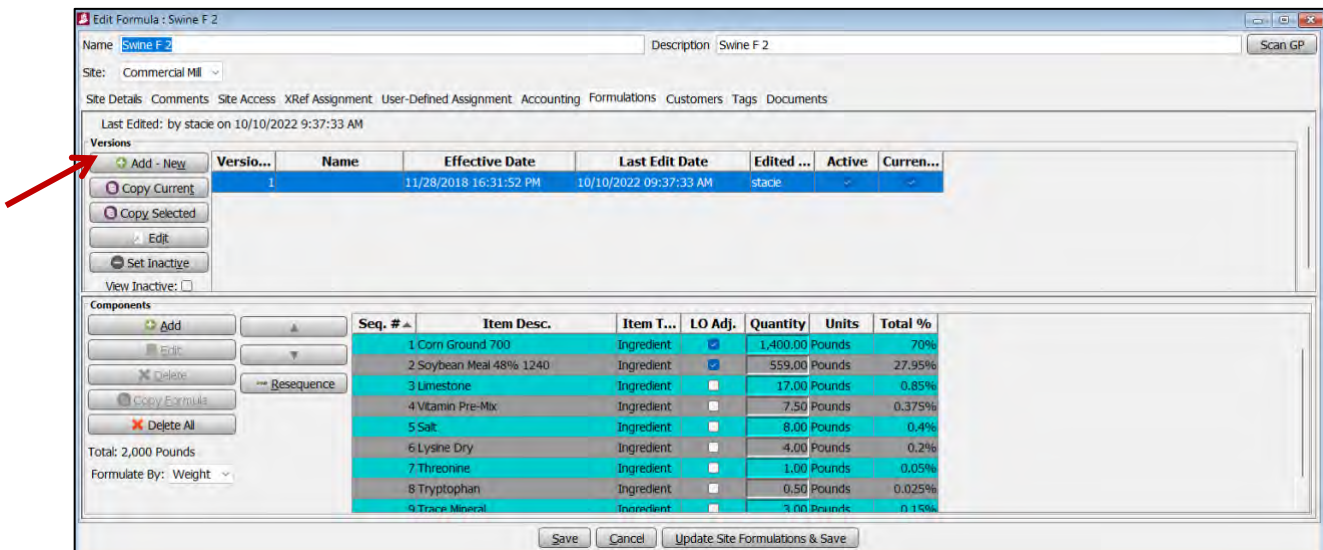
1. Click on the “Formula” button.
2. Choose the site(s) using the formula and click on “Add.”
3. Input the formula name and description.



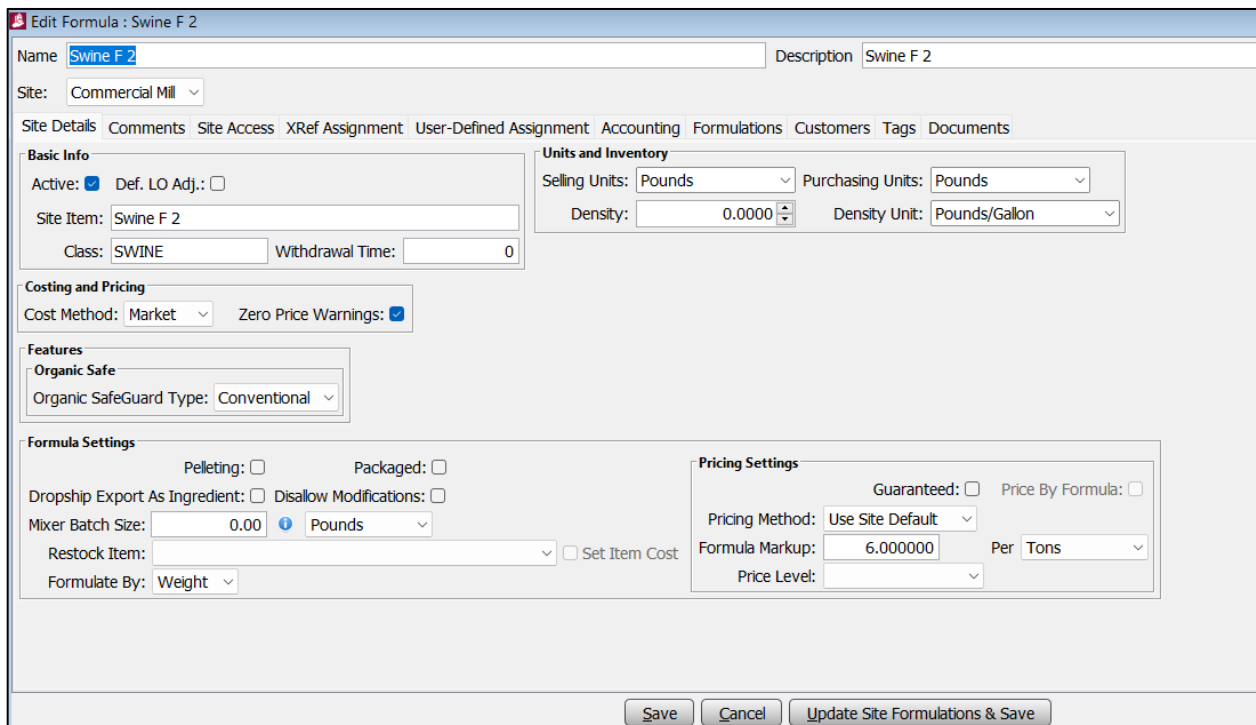
4. Select the “Formulations” tab. In the bottom half, click the “Add” button and select an ingredient, amount of product, and submit. Follow this procedure until all ingredients have been added to make up the formula.

Version	Name	Effective Date	Last Edit Date	Edited ...	Active	Current
1		9/19/2024 09:45:14 AM		N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

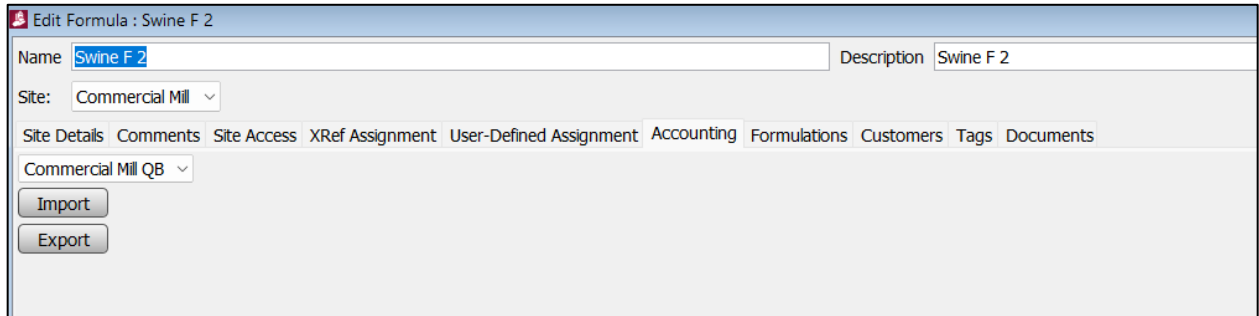
- If versioning is being used, you can create the new formulation version and select from a current formula or create new.



- Select the “Site Details” tab and configure the settings required.



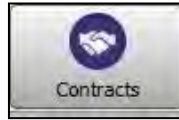
7. If your accounting package is QuickBooks, you can select the “Accounting” tab and import/export your formulation.



The screenshot shows a software window titled "Edit Formula : Swine F 2". At the top, there are two input fields: "Name" containing "Swine F 2" and "Description" containing "Swine F 2". Below these is a "Site:" dropdown menu set to "Commercial Mill". A horizontal tab bar contains several options: "Site Details", "Comments", "Site Access", "XRef Assignment", "User-Defined Assignment", "Accounting", "Formulations", "Customers", "Tags", and "Documents". The "Accounting" tab is currently selected. Below the tabs, there is another dropdown menu labeled "Commercial Mill QB". At the bottom left of the window, there are two buttons: "Import" and "Export".

8. Select and set Comments, Site Access, and Xrefs as required.

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 (\$): Units:

Contract Type: **Special Use Conditions**

Priority:

Price Of (\$): Not Used Use Above Use Below

From Accounting: Use Above or Equal Use Below or Equal

Quantity Details

Quantity:

Warning Level:

Remaining:

Remaining:

Date Details

Effective Date:

Expiration Date:

Contract By

Customer Animal Group Location

Site Access **Items** Customers Animal Groups Locations Transactions XRef Assignment Documents

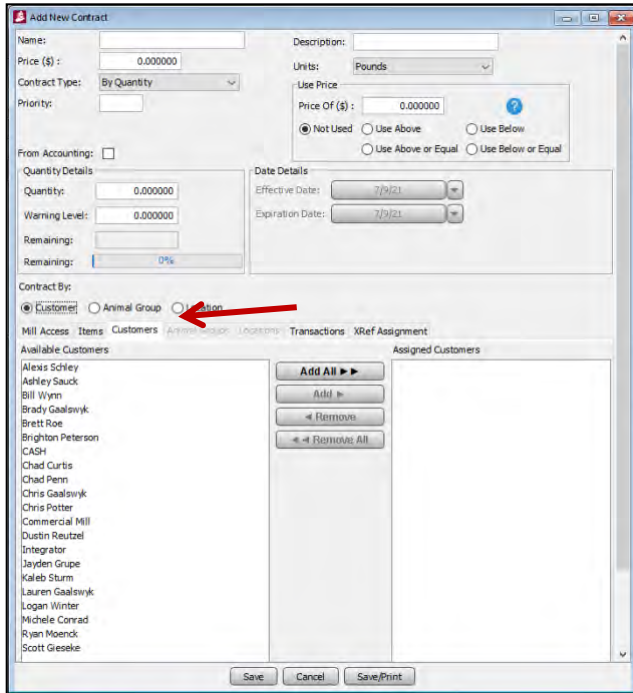
Availa...	Description
<input checked="" type="checkbox"/>	Commercial Mill
<input type="checkbox"/>	Fairmont Mill
<input type="checkbox"/>	Fertilizer Site
<input type="checkbox"/>	On Hold
<input type="checkbox"/>	Stacie
<input type="checkbox"/>	TM Test
<input type="checkbox"/>	Welcome Mill

You may change priorities by dragging & dropping the appropriate rows.

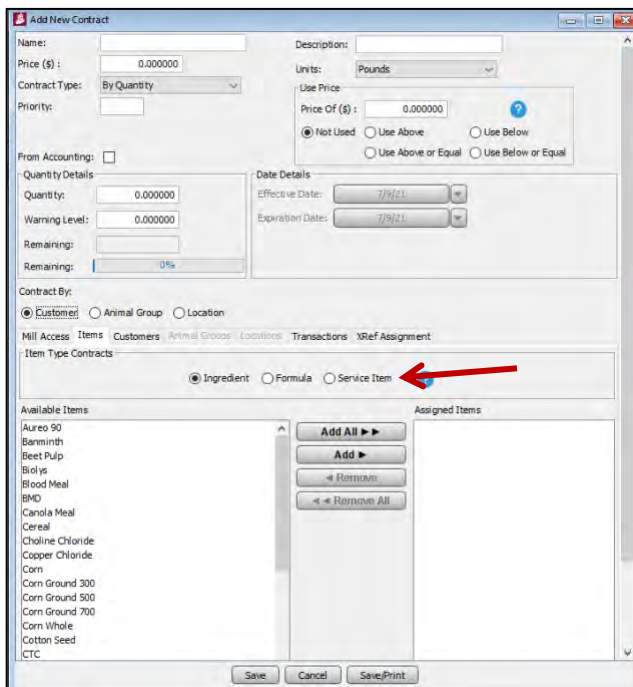
Select All Clear All

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.



5. Select the “Items” tab and choose the ingredient, formula or service item that is affected.



6. Under the “Transaction” tab, you will find the transaction for the contract.

The screenshot shows the 'Add New Contract' dialog box. It includes the following fields and sections:

- Name:** [Text Input]
- Description:** [Text Input]
- Price (\$):** 0.000000
- Units:** Pounds
- Contract Type:** By Quantity
- Priority:** [Text Input]
- From Accounting:**
- Quantity Details:**
 - Quantity:** 0.000000
 - Warning Level:** 0.000000
 - Remaining:** [Text Input]
 - Remaining:** 0%
- Date Details:**
 - Effective Date:** 7/9/21
 - Expiration Date:** 7/9/21
- Use Price:**
 - Price Of (\$):** 0.000000
 - Not Used
 - Use Above
 - Use Below
 - Use Above or Equal
 - Use Below or Equal
- Contract By:**
 - Customer
 - Animal Group
 - Location
- Mill Access:** Items | Customers | Animal Groups | Locations | Transactions | XRef Assignment
- Table:**

Mill	Item	Unit Price	Quantity	Transaction Date
- Buttons:** Save, Cancel, Save/Print

7. Select and set Site Access and Xrefs as required.

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.

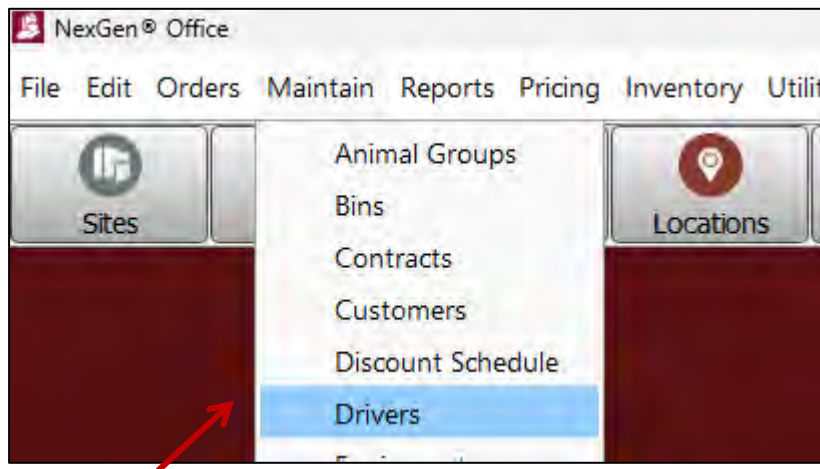
4. Select the “Customers” tab and choose the customer(s) using the Grain Bank.

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

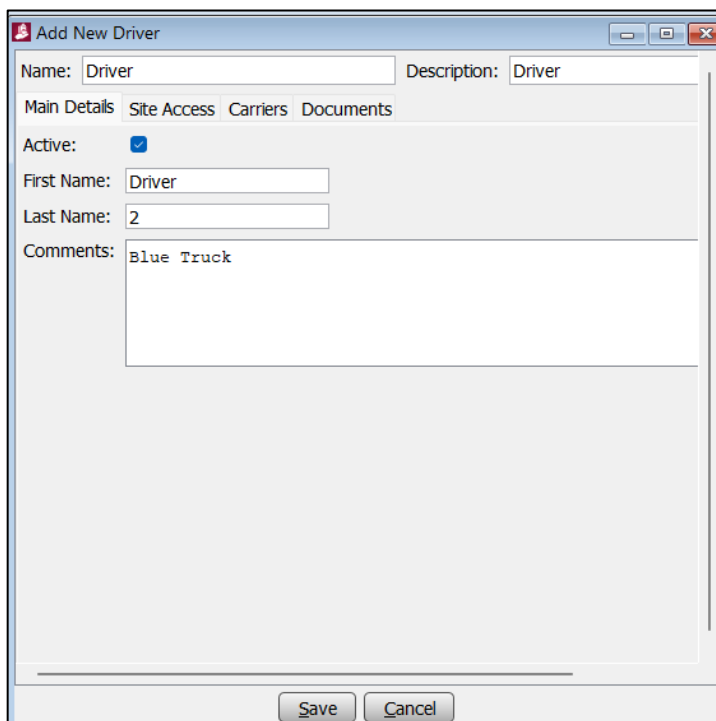
6. Select and set Comments, Site Access, and Xrefs as required.

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.”

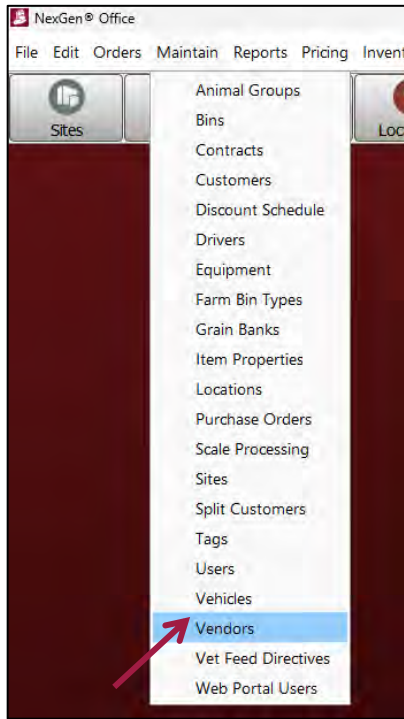
A screenshot of the 'Add New Driver' dialog box. The title bar reads 'Add New Driver'. The dialog has two tabs: 'Main Details' (selected) and 'Documents'. The 'Main Details' tab contains the following fields:

- Name: Driver
- Description: Driver
- Active:
- First Name: Driver
- Last Name: 2
- Comments: Blue Truck

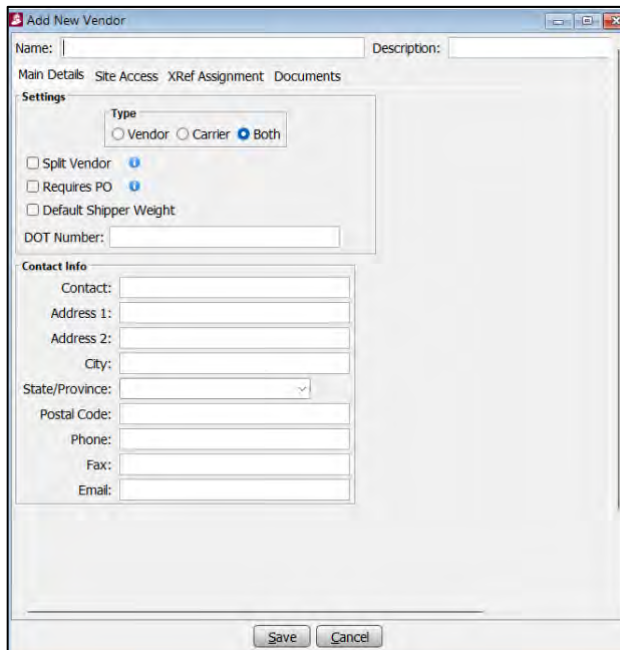
At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Creating a Vendor

1. Go to “Maintain” and then “Vendors.”



2. Input the vendors information.

A screenshot of the 'Add New Vendor' form in the software interface. The form is titled 'Add New Vendor' and has a 'Name:' field and a 'Description:' field at the top. Below these are tabs for 'Main Details', 'Site Access', 'XRef Assignment', and 'Documents'. The 'Main Details' tab is active, showing a 'Settings' section with radio buttons for 'Type' (Vendor, Carrier, Both), where 'Both' is selected. There are also checkboxes for 'Split Vendor', 'Requires PO', and 'Default Shipper Weight', and a 'DOT Number:' field. Below the settings is a 'Contact Info' section with fields for 'Contact:', 'Address 1:', 'Address 2:', 'City:', 'State/Province:', 'Postal Code:', 'Phone:', 'Fax:', and 'Email:'. At the bottom of the form are 'Save' and 'Cancel' buttons.

3. Select and set Site Access and Xrefs as required.

-- END OF USER GUIDE--

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