WHERE MATCHLESS SERVICE MEETS PRACTICAL ENGINEERING FOR EXCEPTIONAL SOLUTIONS.

Creating Entities in NexGen® Office

Easy Automation, Inc. User Guide
Last Updated October 21, 2024

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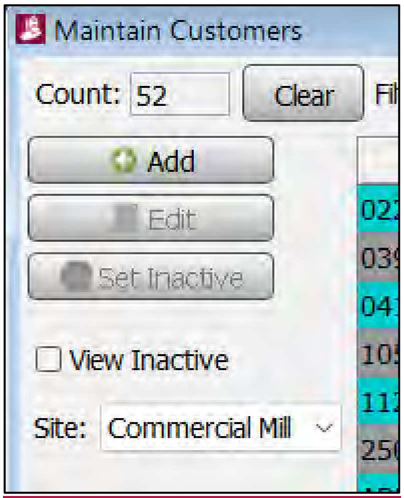
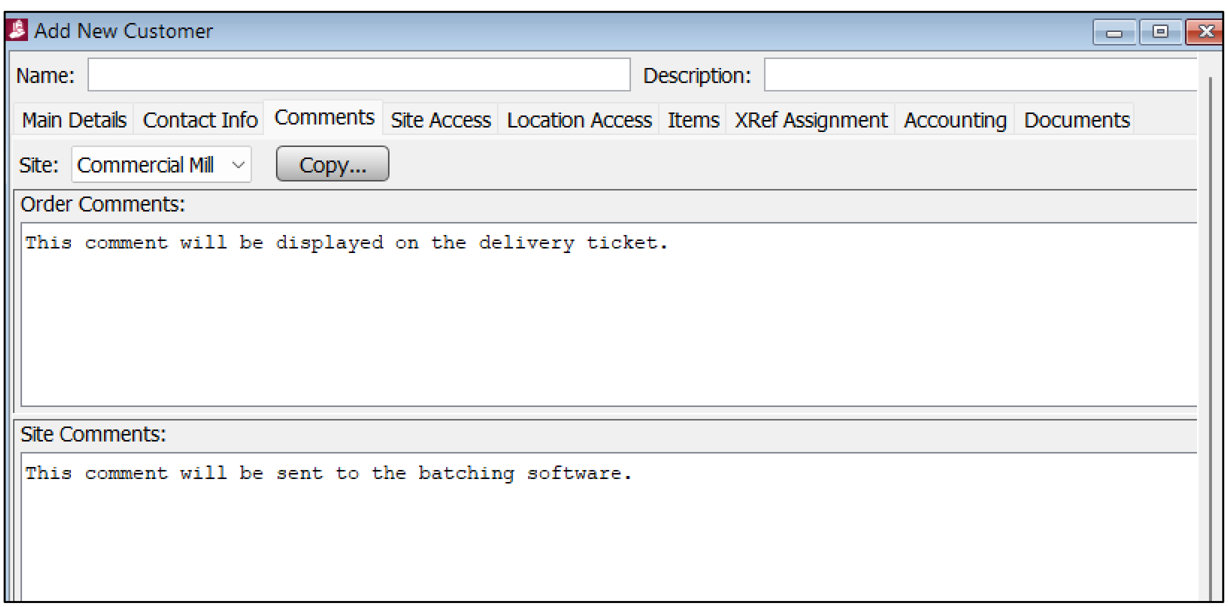
Basics Across All Entities

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



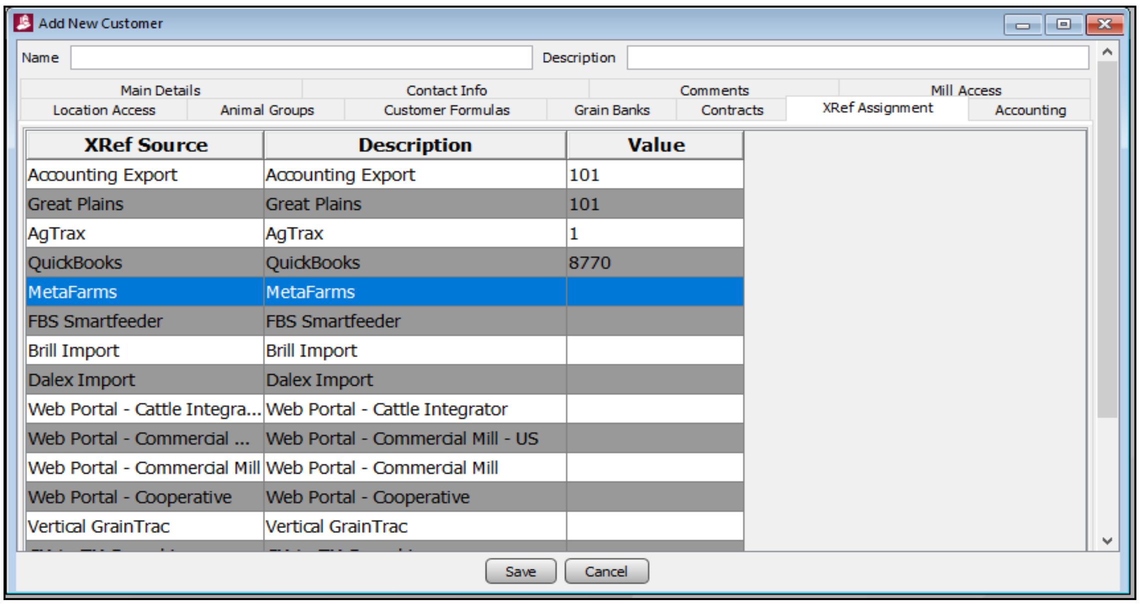
2. All entity maintenance windows will have “Add” (to add a new entity), “Edit” (to edit an existing entity), “Set Inactive / Set Active” (to make the selected item inactive or active), and a “View Inactive” checkbox (to see the inactive items along with the active items).

3. Most entities will have a “Comments” tab. Select the comments and input comments if required.



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.

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.

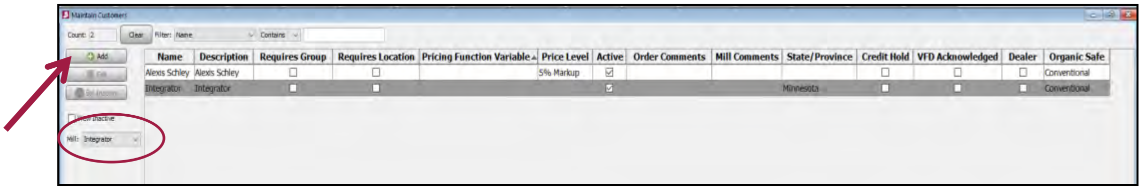


6. Once everything is set on the entity, click the “Save” button at the bottom.

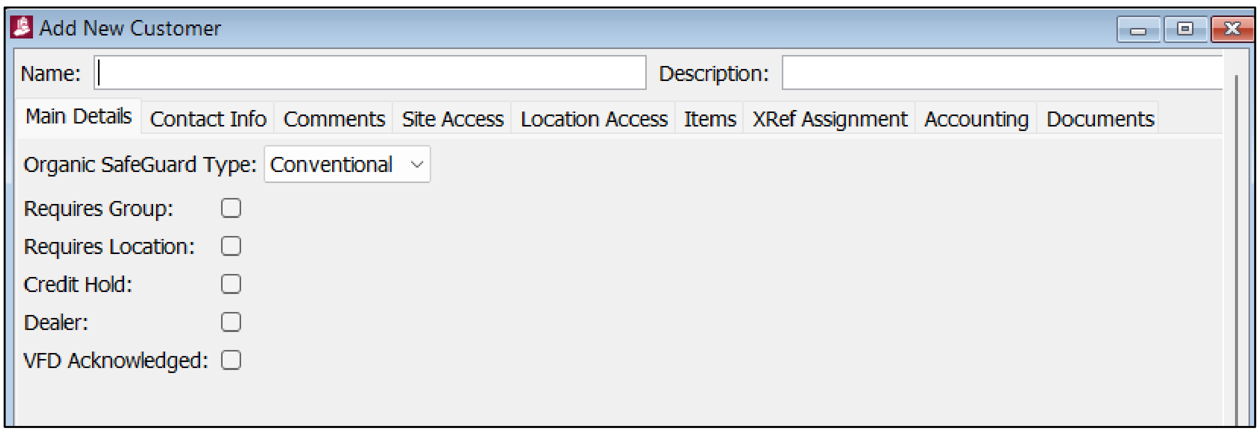
Creating a Customer

1. Select the “Customers” button.

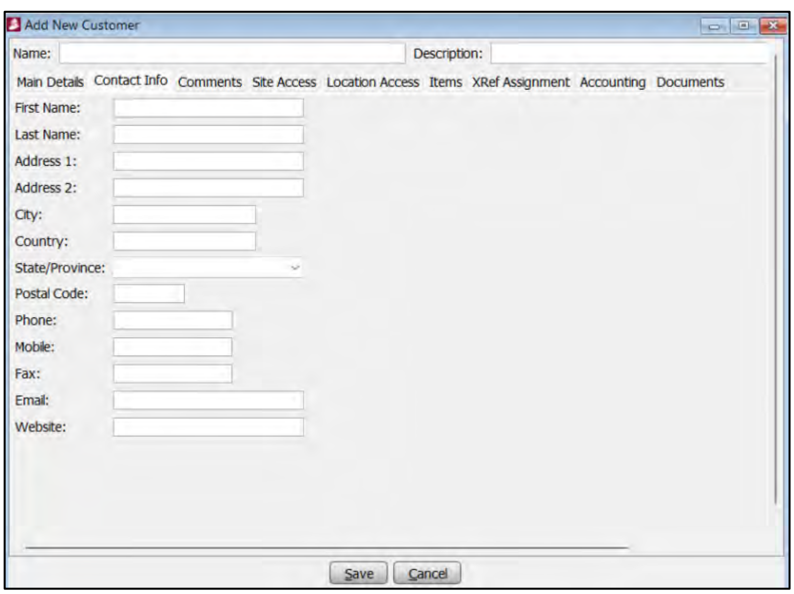
2. Select the site(s) the customer will use, and press “Add.”



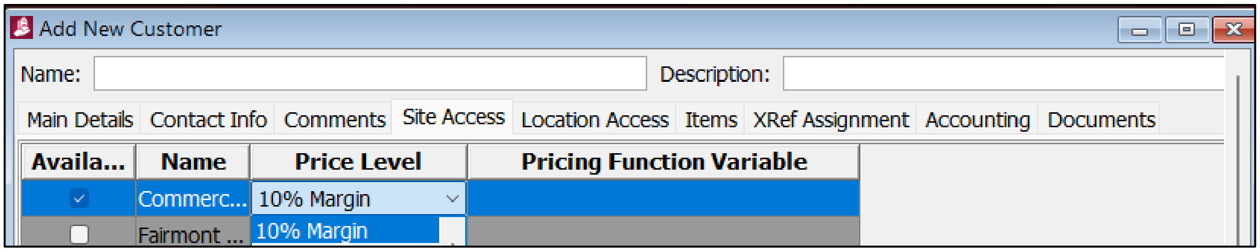
3. Input the customer name and description.
   a. If you select requires group or location, orders will not be processed until the corresponding requirements are selected.



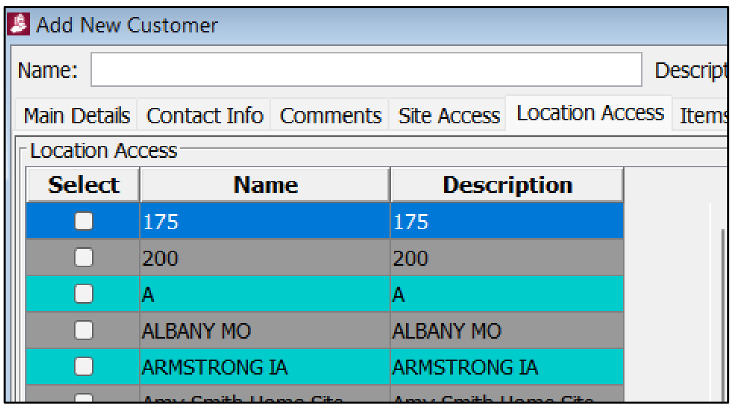
4. Select the “Contact Info” tab and configure the customer’s information.



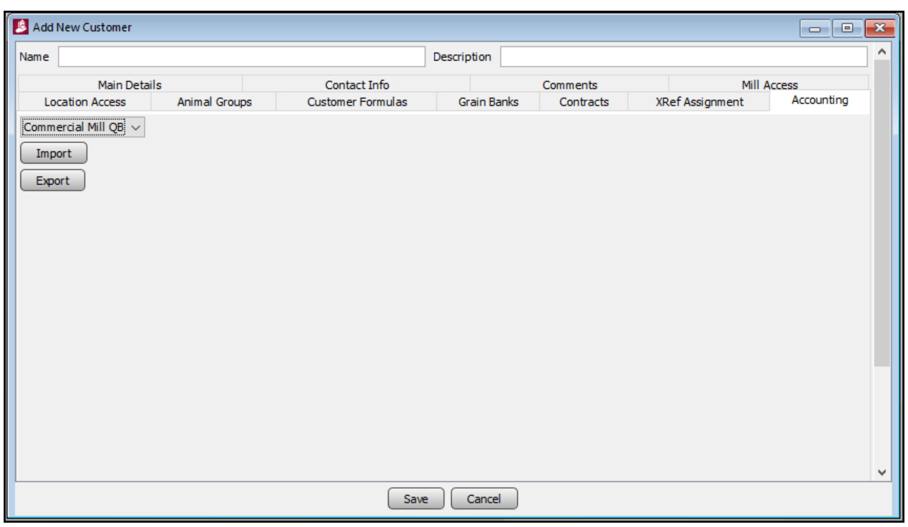
5. Select and set Comments, Site Access, and Xrefs as required.
6. In the “Site Access” tab, also set the price level used by the customer.



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.

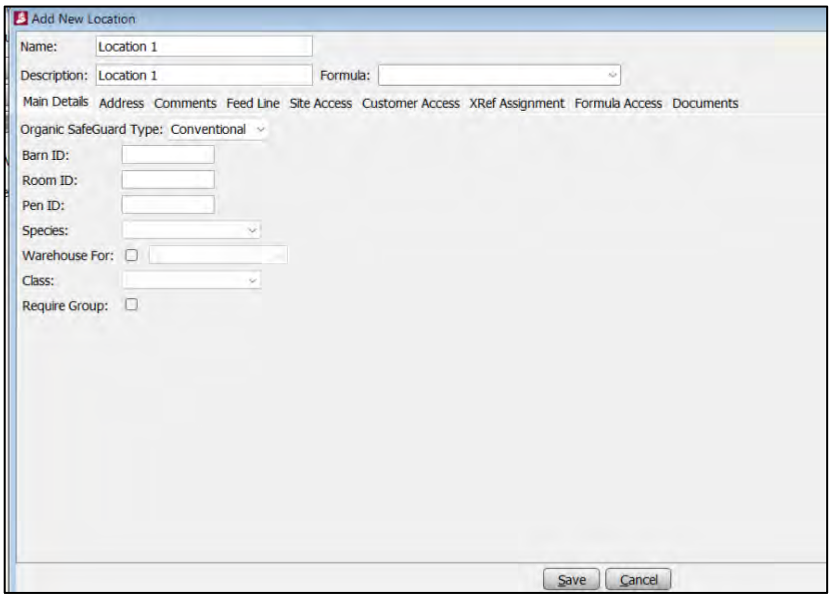


Creating a Location

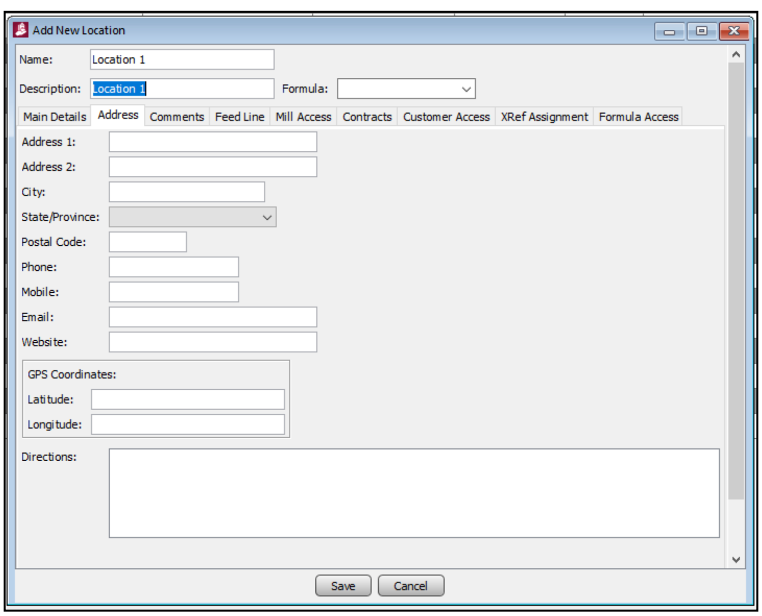
1. Click on the "Locations" button.

2. Select the site(s) using the location and press add.

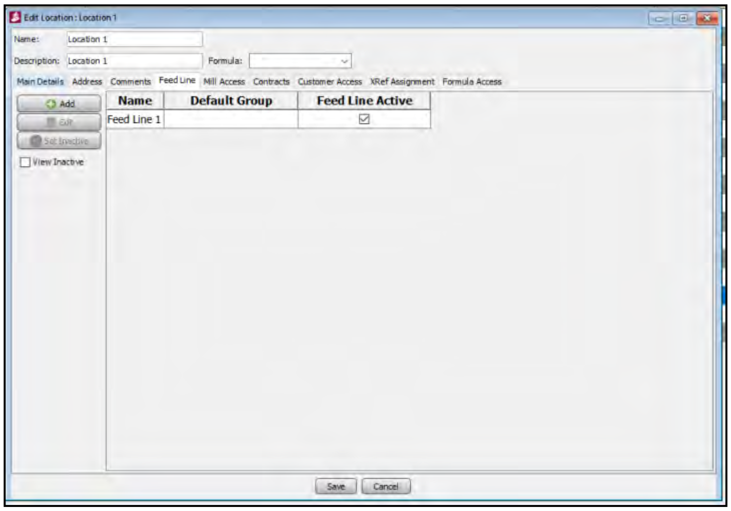
3. Input the name, description, customer, formula, and the other details if being used.



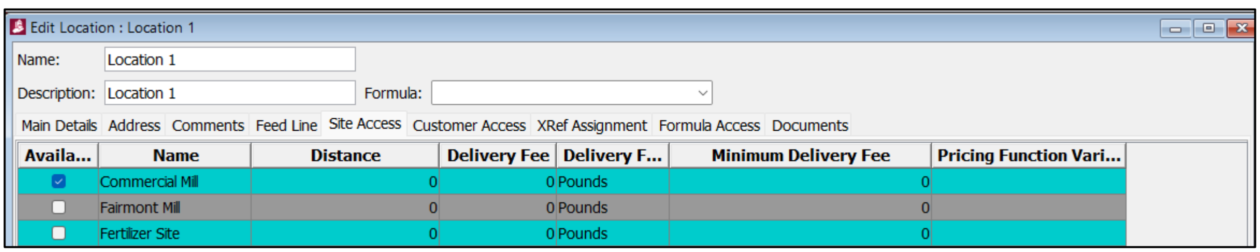
4. Select the "Address" tab, input the location details



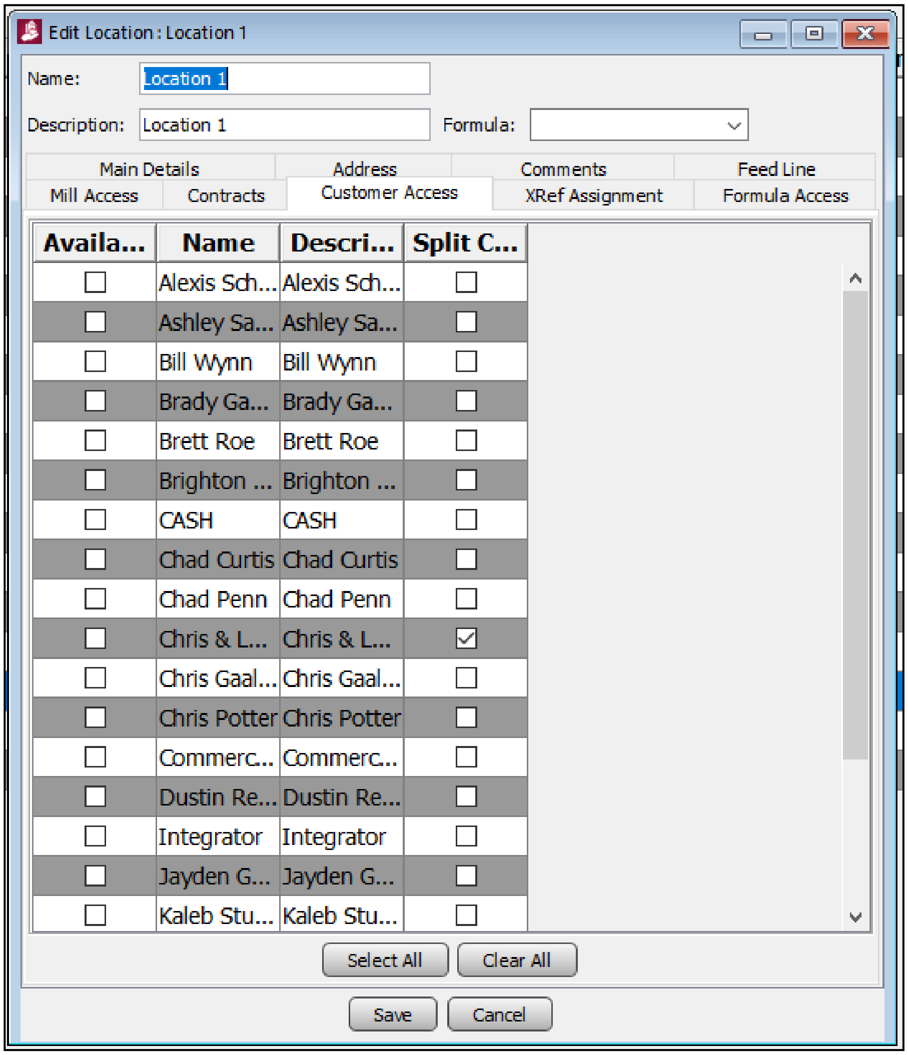
5. Select the “Feed Lines” tab, add lines if being used.
    - NOTE – location must be saved before creating feed line.



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).

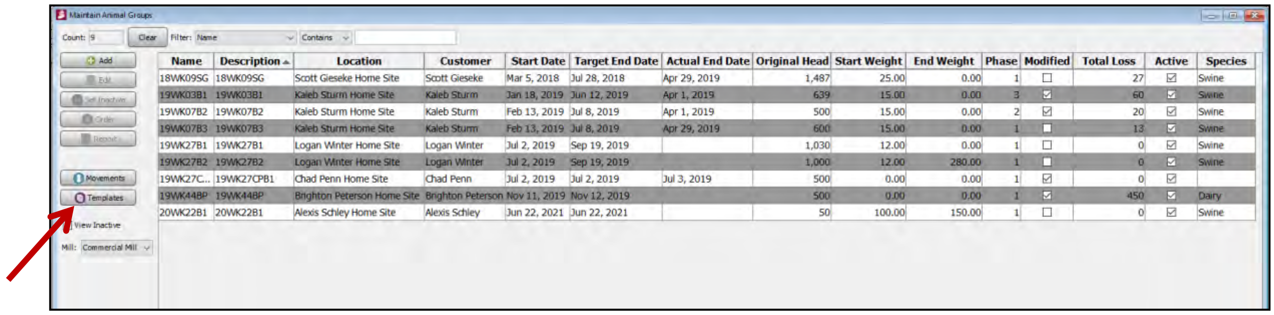


8. Select and set Comments, Site Access, and Xrefs as required.

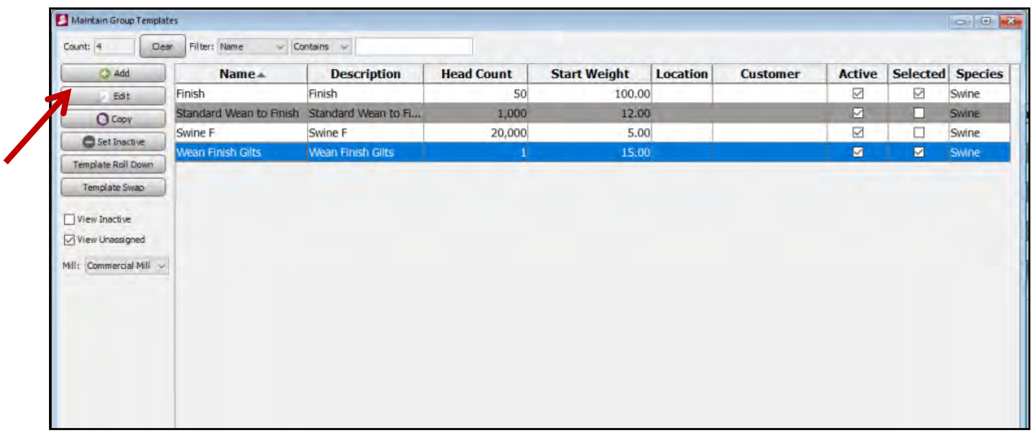
Creating a Group

1. Select the “Group” button. 

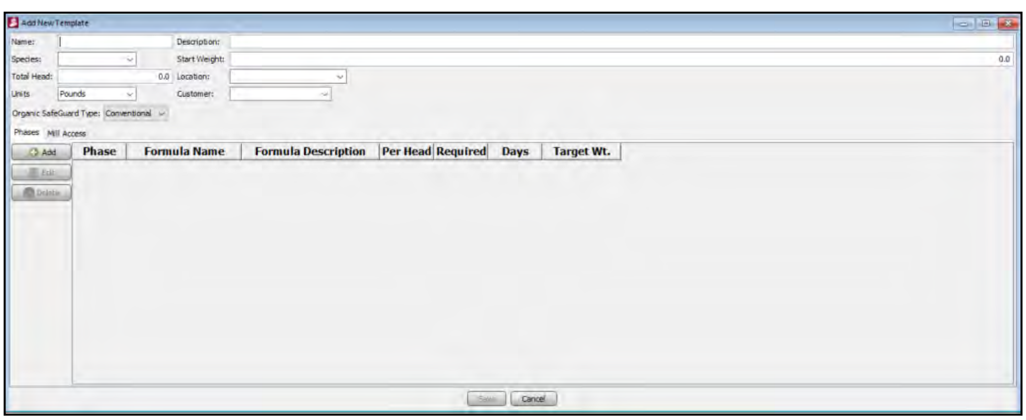
2. Before creating a new group, you’ll want to create a group template.



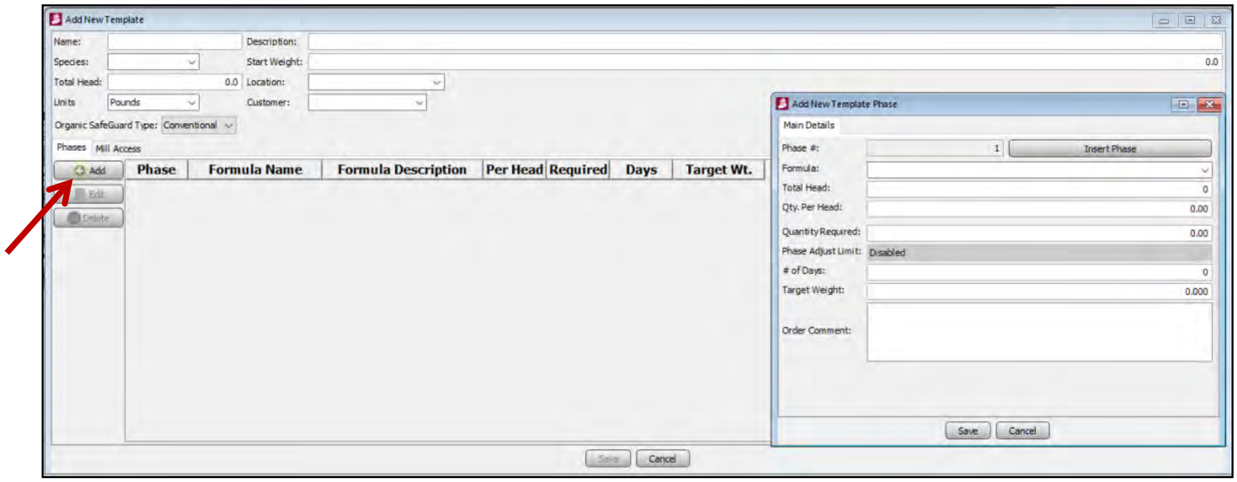
3. Click “Templates.” In the template form, press the “ADD” button.



4. Input the templates details.



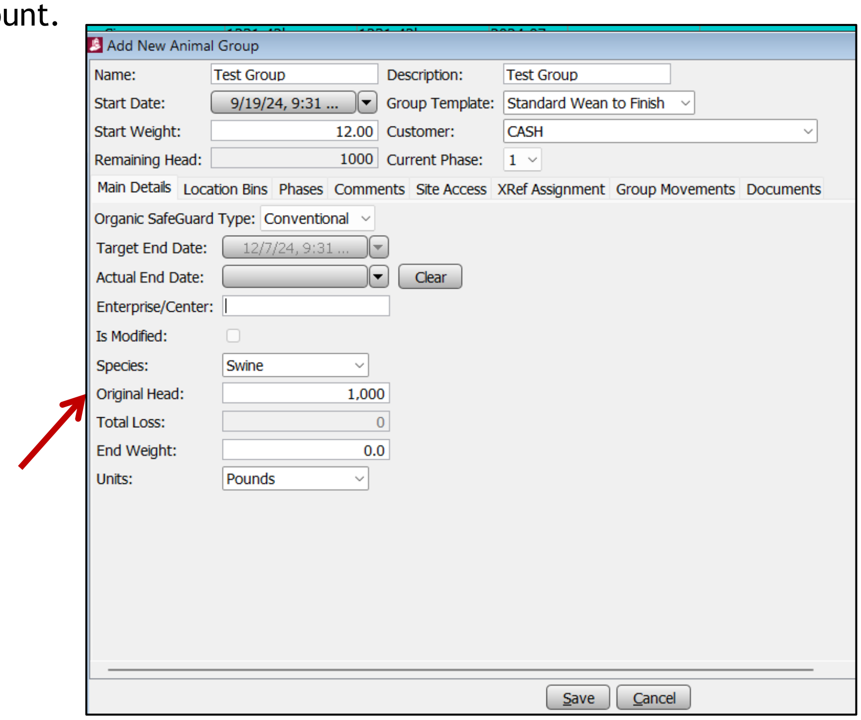
5. Press the “ADD” button and add all phases with the details needed to create the template.



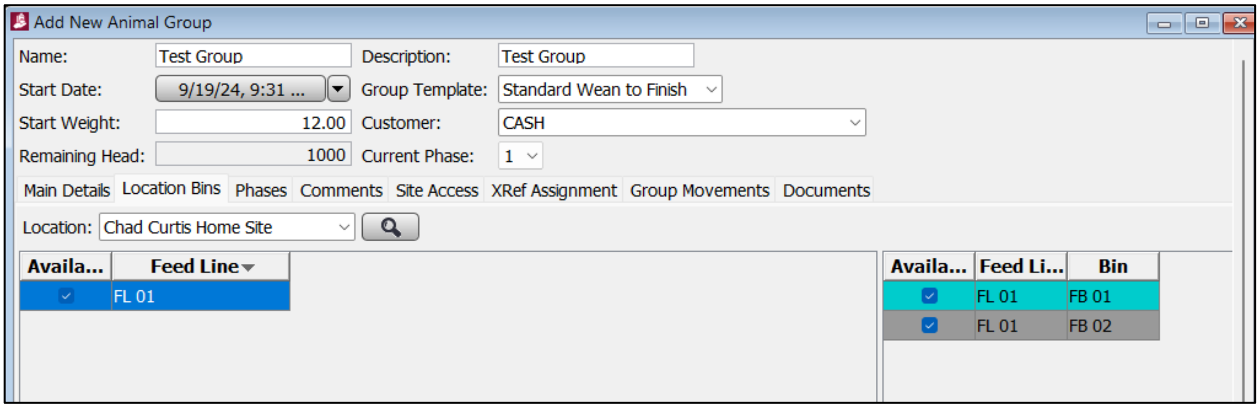
6. Once all phases have been added, select the “Site Access” tab and select the sites needing access and then press “Save.”

7. On the “Maintain Animal Groups” window, select the site(s) the group will use and press “add.”

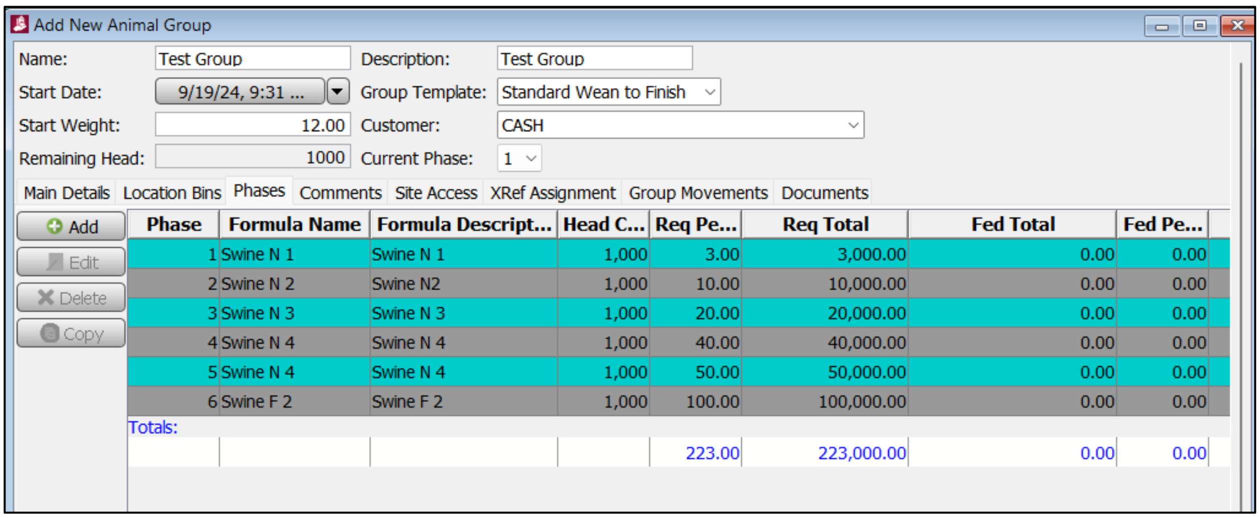
8. Input the group name and description. Select the start date, group template and customer. Update the current phase if required and input the correct total head count.



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



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



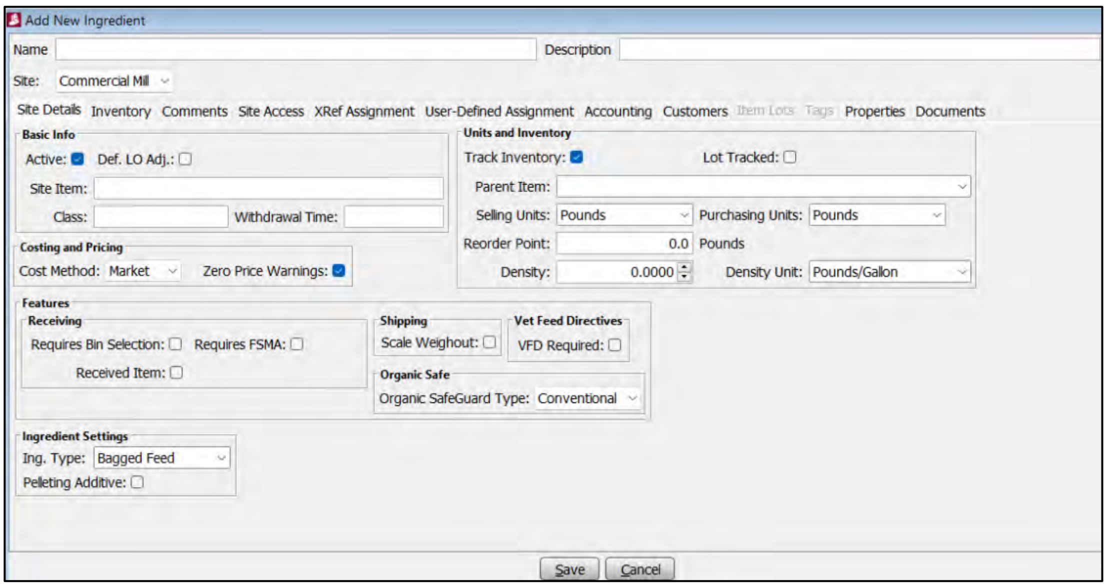
11. Select and set Comments, Site Access, and Xrefs as required.

Creating an Ingredient

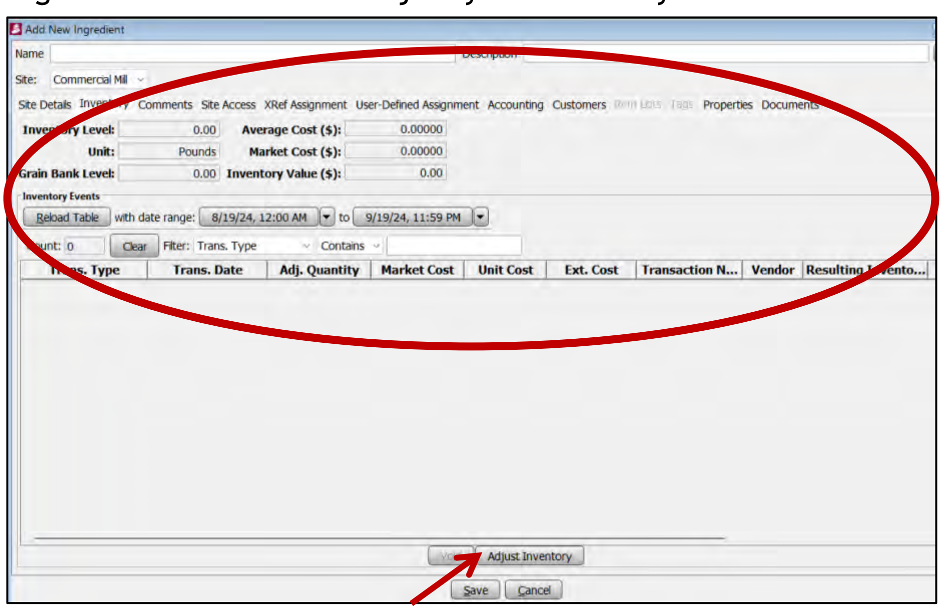
1. Click the Ingredient button.

2. Choose the site(s) the ingredient is going to be used at and click the "Add" button.

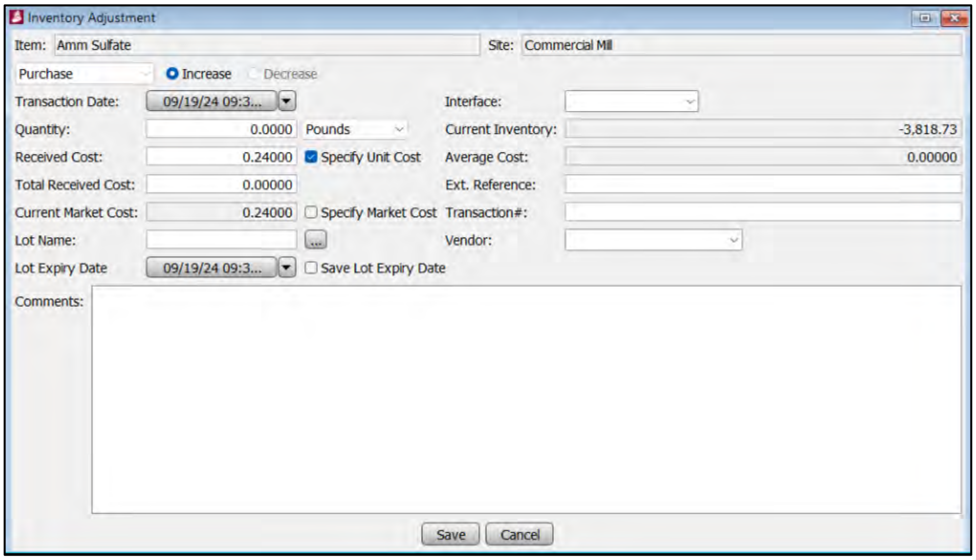
3. Several steps need to take place in creating an ingredient. Below is a list of the things that will need to be inputted if they are being used:
   - *Name, Description, Set ingredient as Active, Site Item, Ingredient Type, Lot Tracking (if required), Cost Method, and Scale Receiving Setup.*



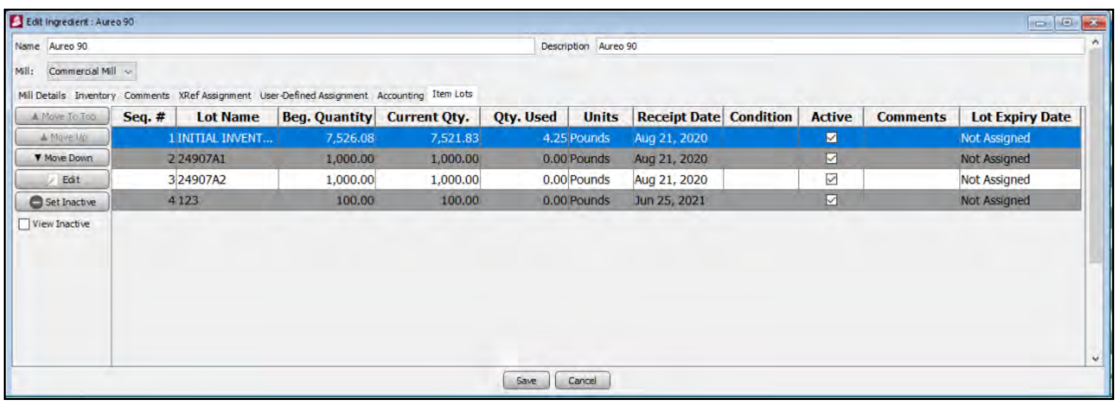
4. Selecting the "Inventory Tab", you'll see Inventory Levels, Inventory Value, Grain Bank Level, Average Cost, Market Cost transactions that have been created for this ingredient. You can also adjust your inventory within this form.



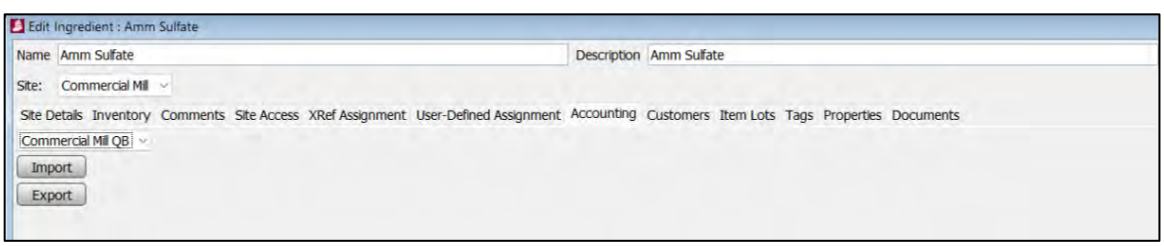
5. Inventory adjustments have several options for the transaction. Input the information required.



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



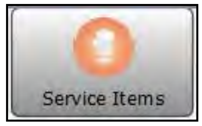
7. If your accounting package is QuickBooks, you can select the "Accounting" tab and import/export your ingredient.



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

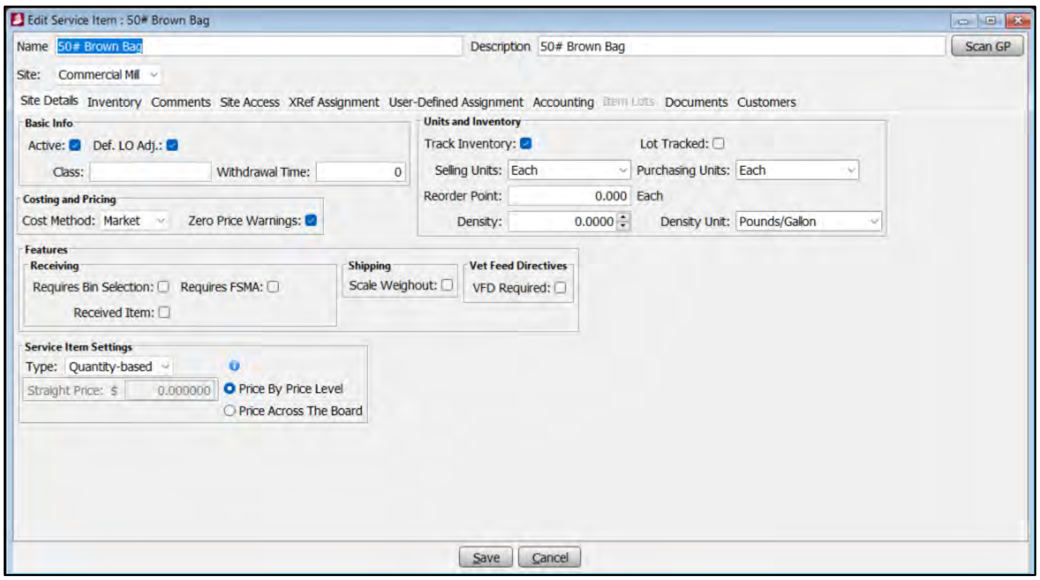
Creating a Service Item

1. Click on the “Service Items” button.

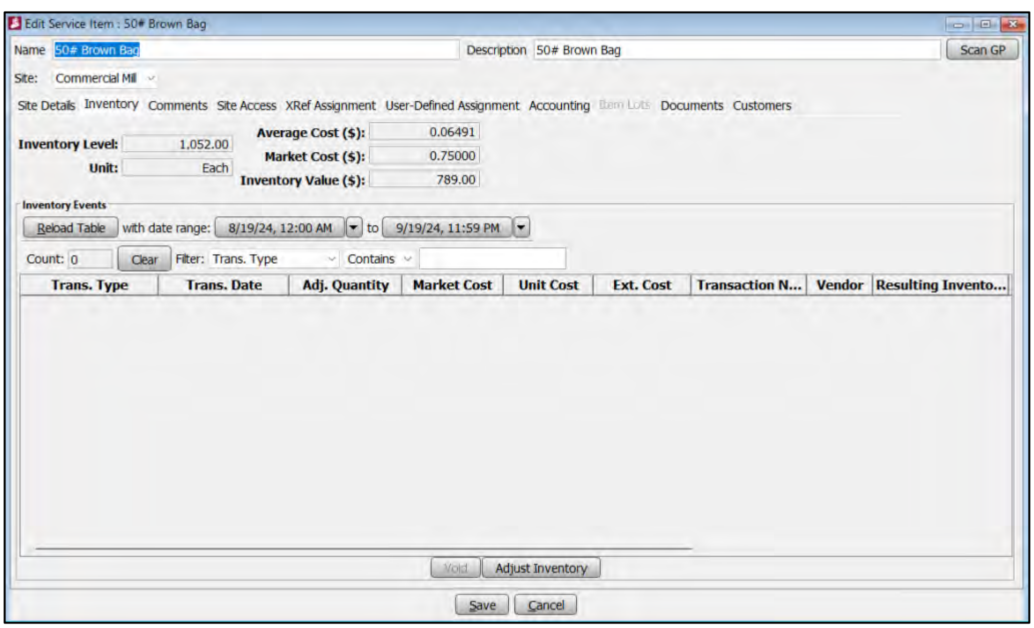


2. Choose the site(s) where the service item will be used and click the “Add” button.

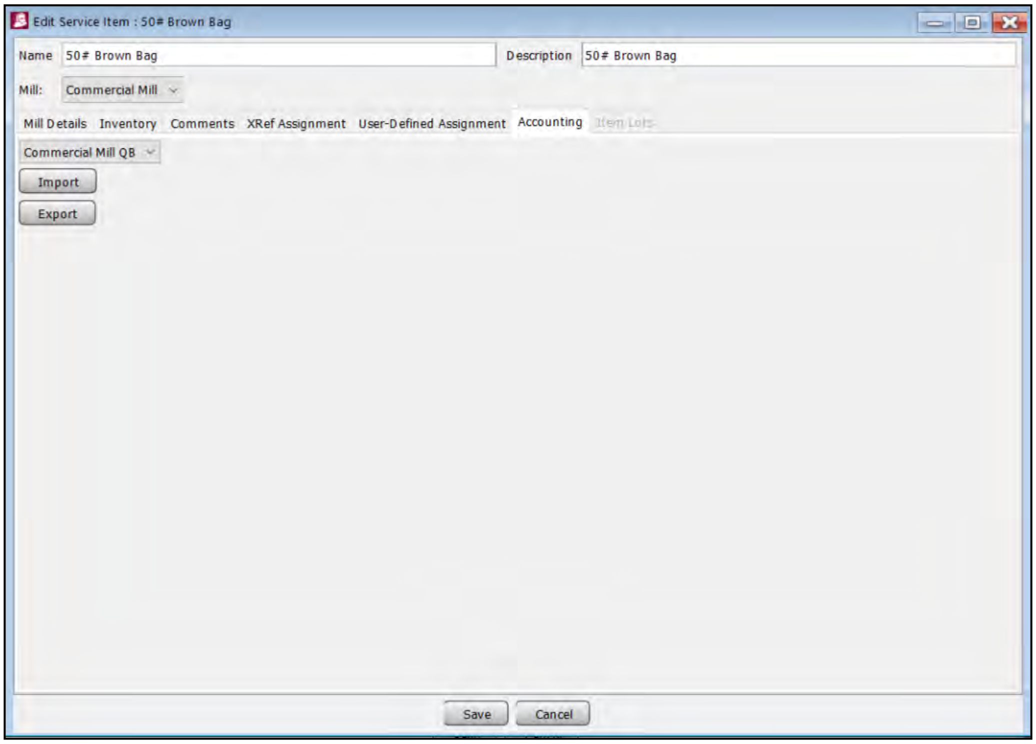
3. Under “Site Details”, input the following items: name, description, class, item type, and price.



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



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



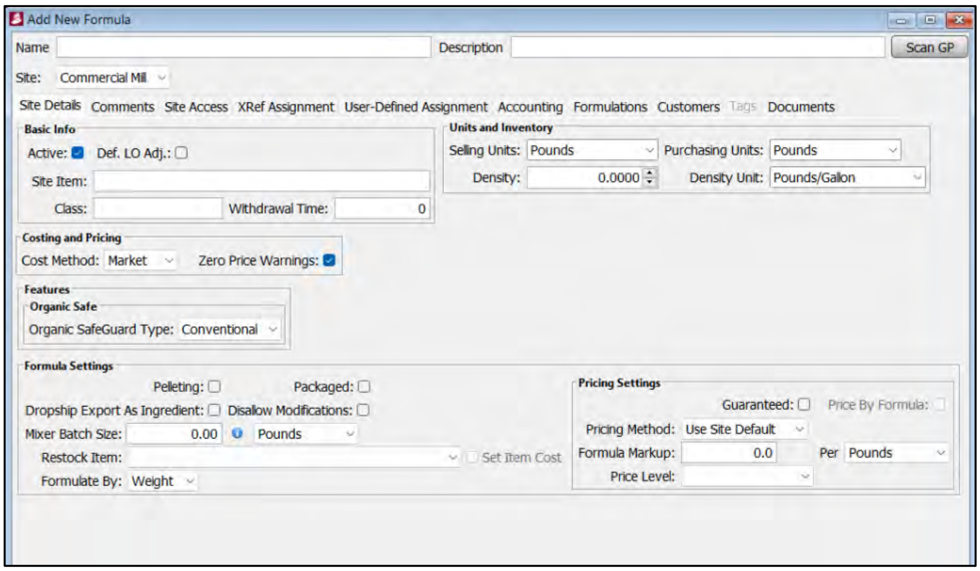
6. Select and set Comments, Site Access, and Xrefs as required.

Creating a Formula

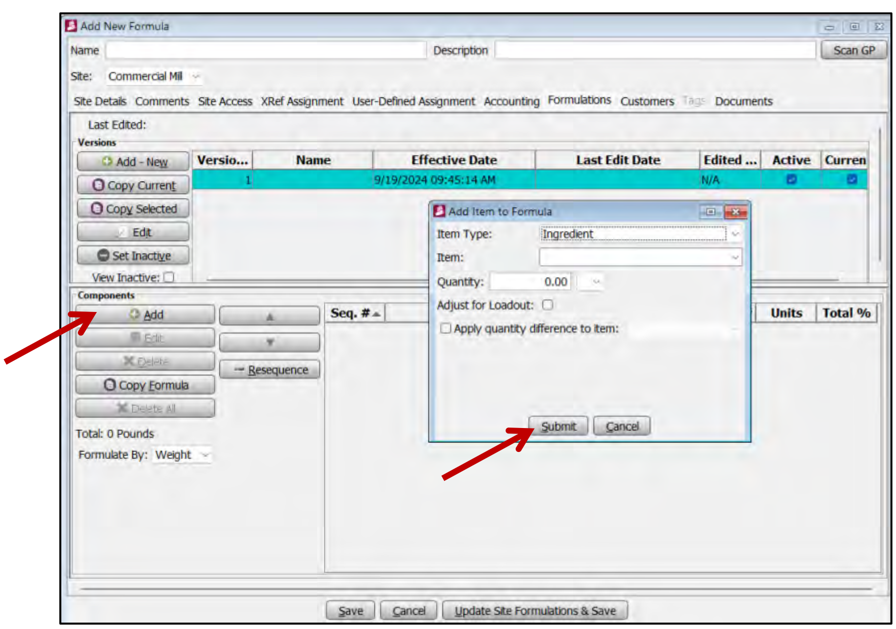
1. Click on the “Formula” button.

2. Choose the site(s) using the formula and click on “Add.”

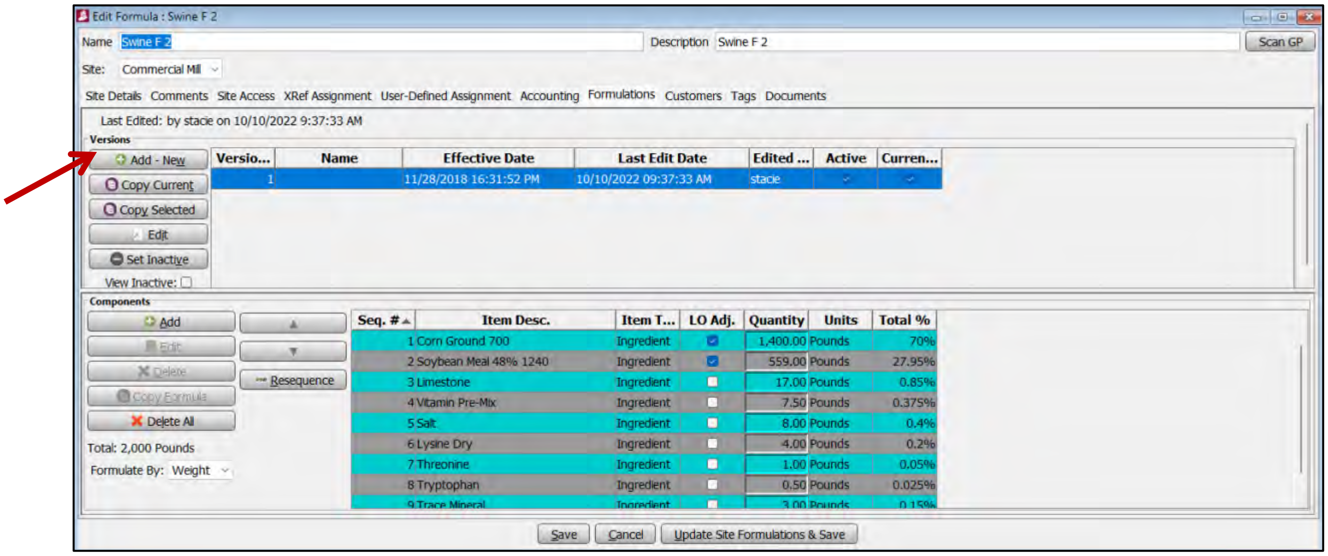
3. Input the formula name and description.



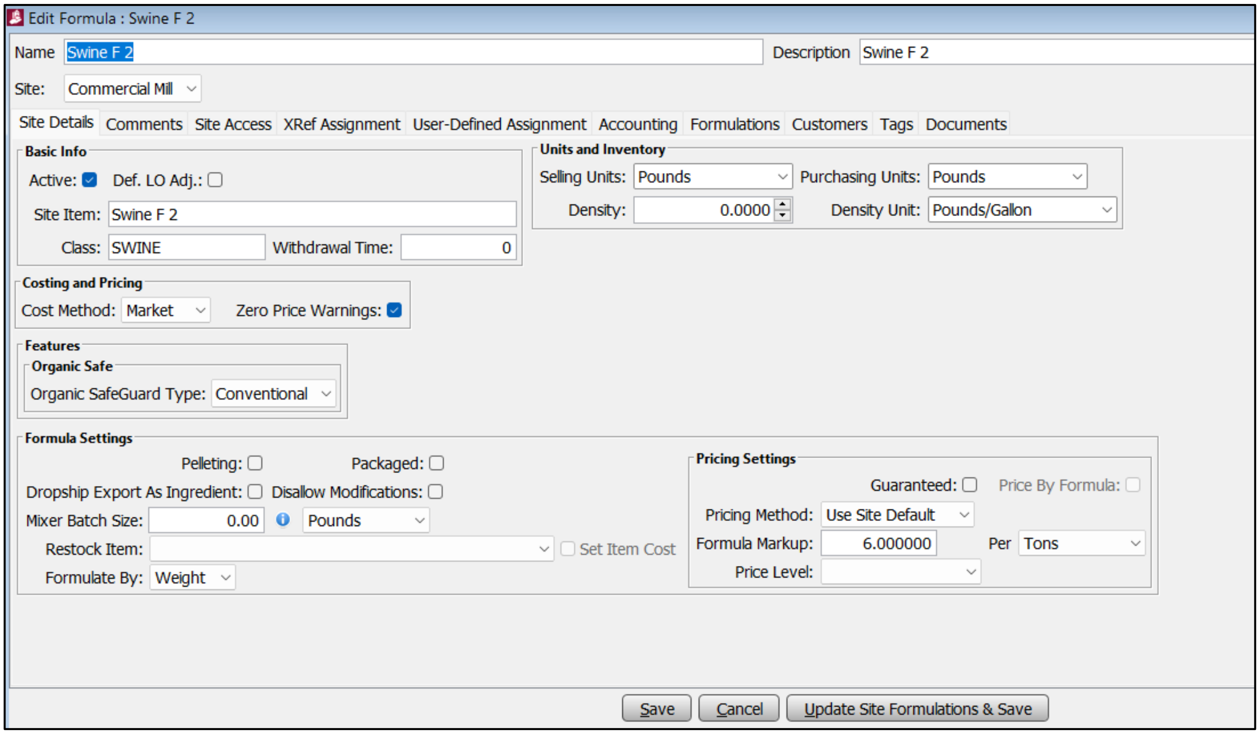
4. Select the “Formulations” tab. In the bottom half, click the “Add” button and select an ingredient, amount of product, and submit. Follow this procedure until all ingredients have been added to make up the formula.



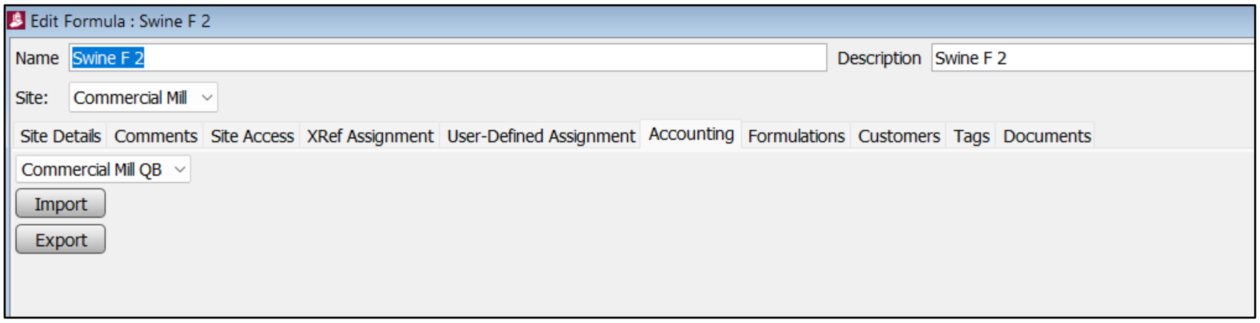
5. If versioning is being used, you can create the new formulation version and select from a current formula or create new.



6. 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.



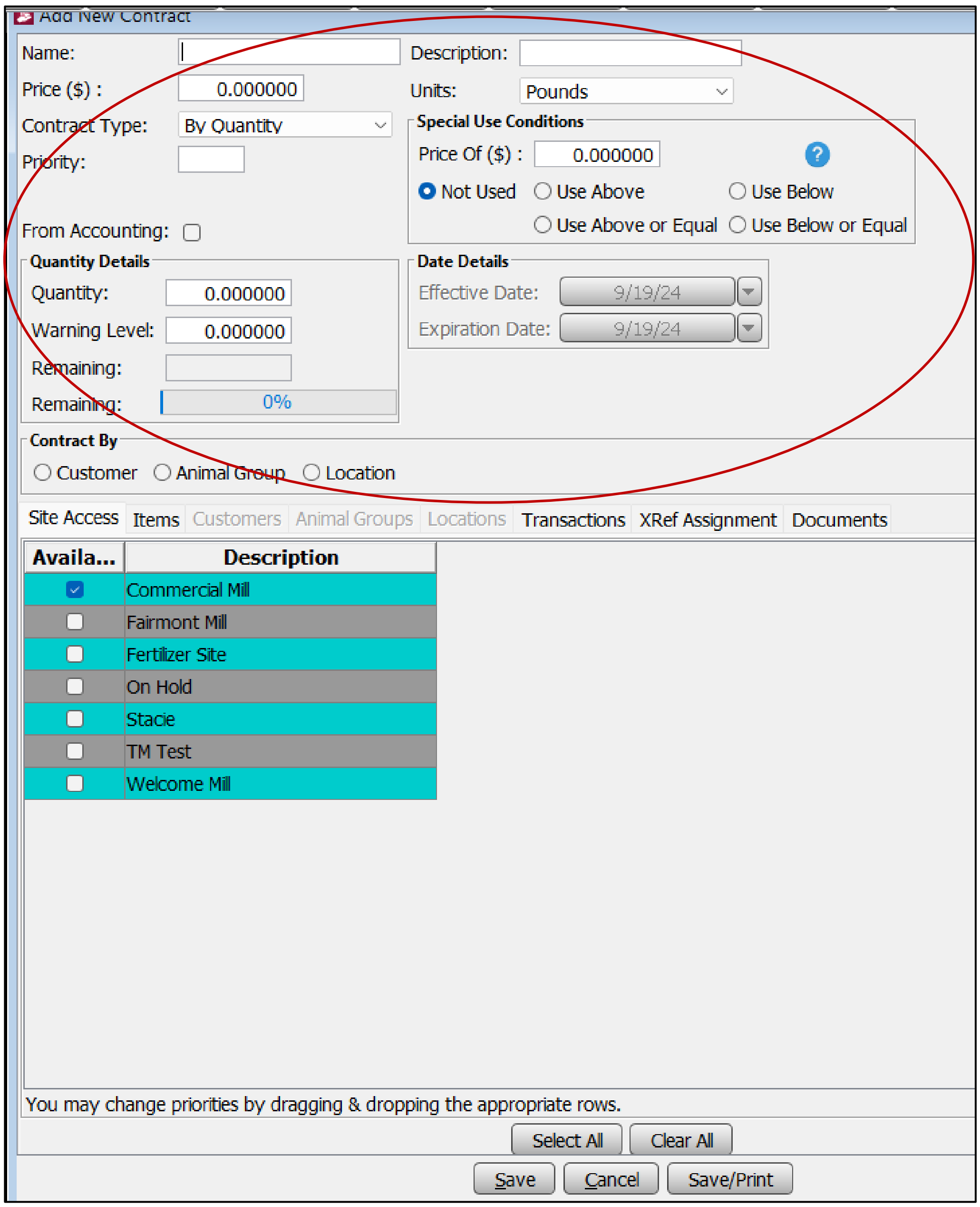
8. Select and set Comments, Site Access, and Xrefs as required.

Creating a Contract

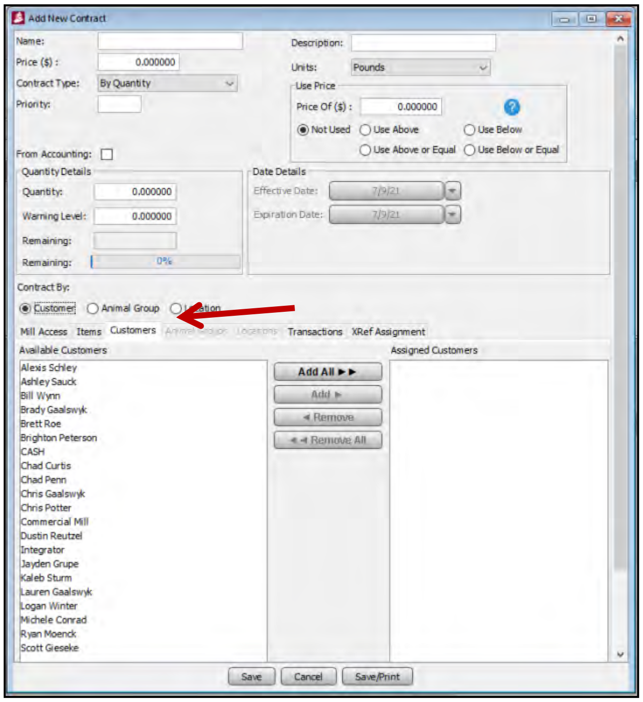
1. Click on the “Contracts” button. 

2. Choose the site(s) where the contract will be assessed and click the “Add” button.

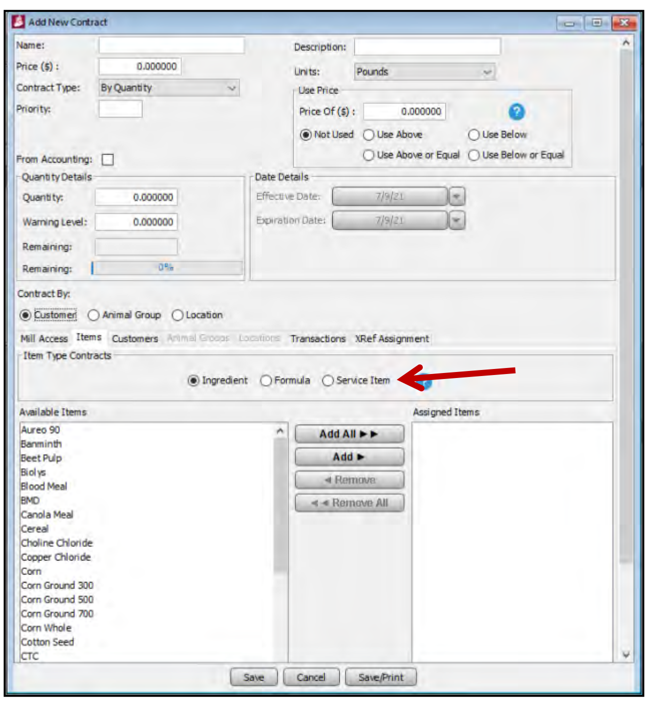
3. Input the contract info: name, description, price, units of measure, contract type, use price and the quantity details.



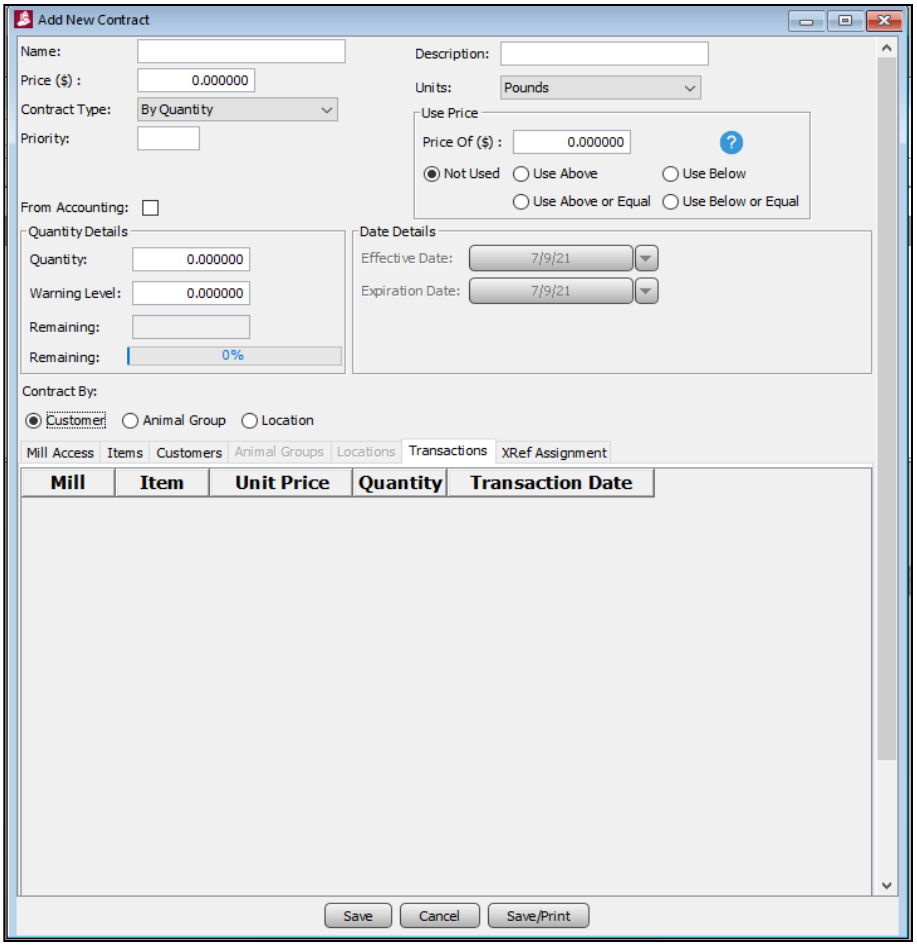
4. Select “Contract By” and choose customer, animal group, or location.
    - Once “contract by” is selected. Add customer(s), animal group(s), or location(s) from the left. To do this click on ‘Customer 1’ to highlight the line then select ‘Add’ in the middle column.



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.



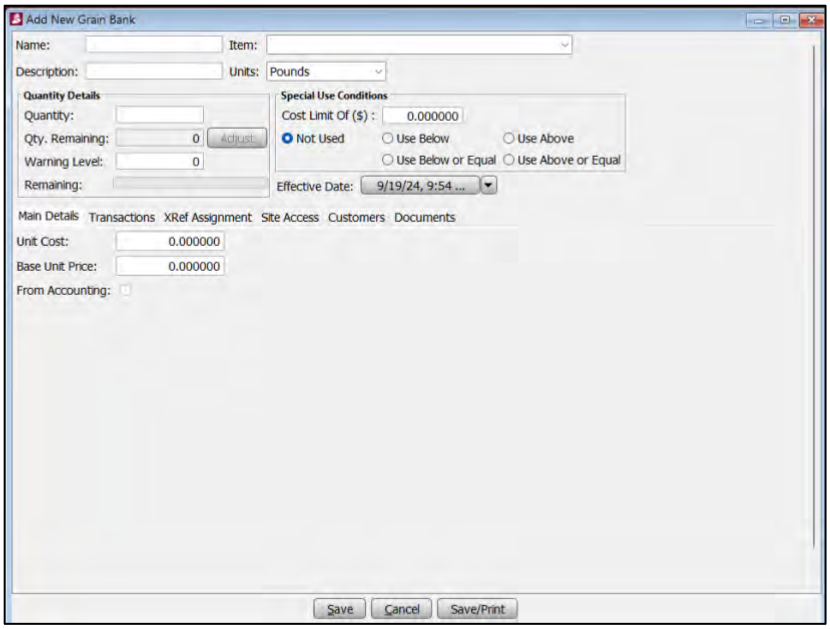
7. Select and set Site Access and Xrefs as required.

Creating a Grain Bank

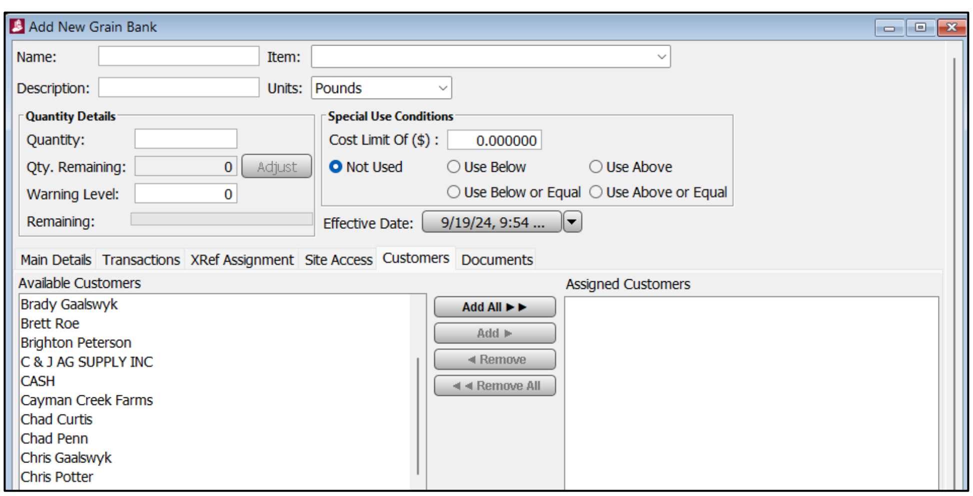
1. Click on the “Grain Bank” button. 

2. Choose the site(s) using the Grain bank and click the “Add” button.

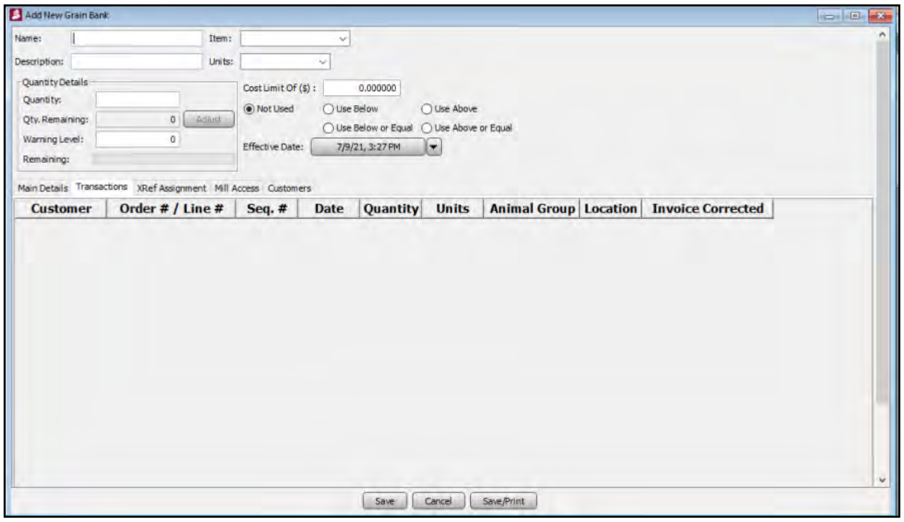
3. Input the Grain Bank name, description, item, effective date, and quantity.



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



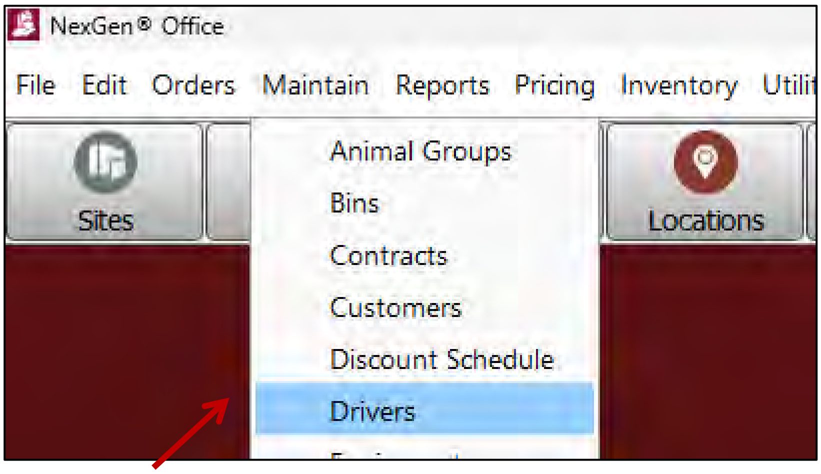
5. Within the “Transactions” tab, you will find the transactions that affect the Grain Bank.



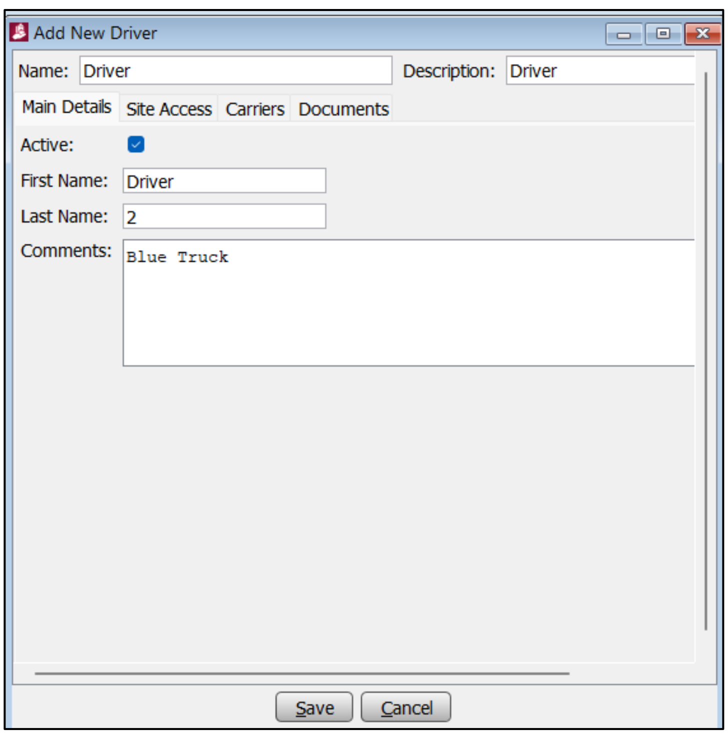
6. Select and set Comments, Site Access, and Xrefs as required.

Creating a Driver

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

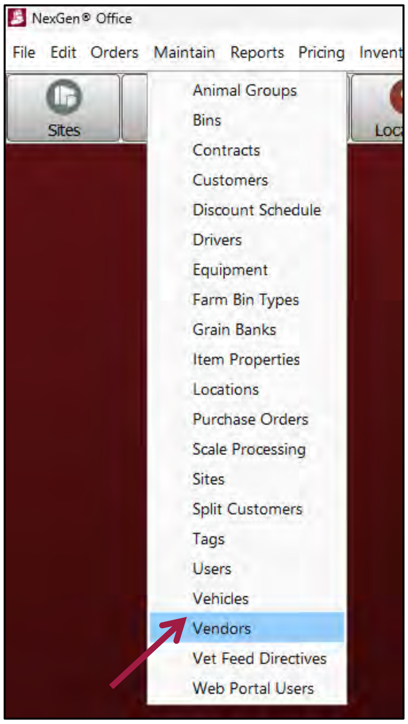


2. Press the “Add” button.
3. Input the driver information, make active, click on “Carrier” tab if needed and select appropriate carrier, and press “Save.”

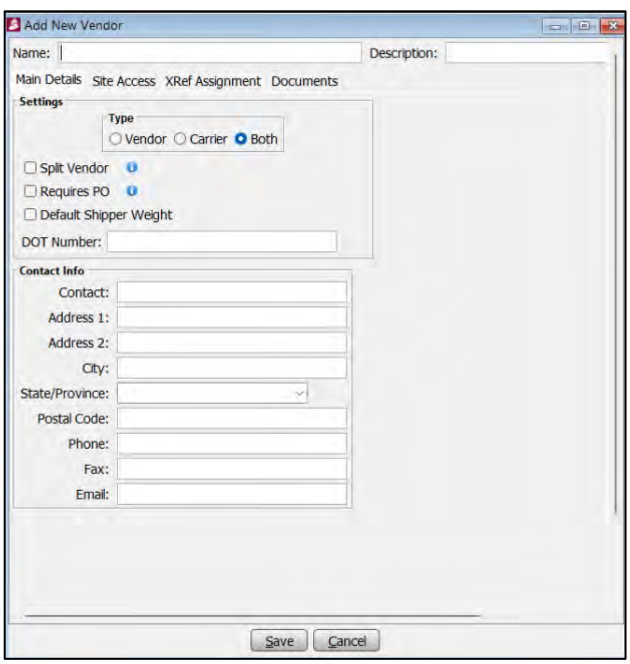


Creating a Vendor

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



2. Input the vendors information.



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

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