

AgSync and AgTrax Integration

Set up and User Instructions

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AgSync Integration Setup

Products and services from AgTrax are entered into AgSync and become the available items for order creation. Customer Cross reference information is entered into the AgSync customer Tree to inform AgTrax of whom to bill for an order. AgTrax integration information is required for AgSync to contact the AgTrax API to create an invoice.

Product Item data

In order for the external product list to be available in AgSync, the AgTrax product list and the AgSync product list must be matched. **AgSync uses a product translation listing which converts the AgTrax product list to ours.

Send AgTrax product list to AgSync

1. User will need to export a report from AgTrax with the product/items they need added to AgSync for dispatch. **The report should include the AgTrax item number, and item description.**
2. Review the list prior to sending to AgSync. Remove any products that will not be used for dispatch and leave the ones needed. This will keep the account product list efficient.
3. Send this report to support@agsync.com with your company name and location. AgSync will notify users when the product list has been imported and ready for review.

Product Import into AgSync

1. AgTrax user sends the product report to AgSync for importing
2. AgSync support staff will import the AgTrax product list to the API partners account. Upon import AgSync will match its product list with the AgTrax product list by finding the closest product name, and mapping these two products together. [AgTrax Product A = AgSync Product A]

Review the Product List

Check product list:

1. In AgSync go to Account Settings Tab/ Integration Tab / External Product List Tab. This list shows the AgTrax products that were imported and what AgSync product it is associated with.
2. Read thru the external products and their corresponding AgSync products and correct any mapping issues as necessary.

To make correction:

1. Right click on external product name and choose Edit Product.
2. In the next window search for the correct AgSync product to pair it with, click to select it (*turns yellow*).
3. Click save.
4. Review your results to confirm adjustment was made.

Activate Product List

When an API partner user creates an order, the products load from the external product list. In order to populate this dropdown for use, the available product list must be updated.

To activate products for use in order creation:

1. Go to the Account Settings Tab / Order Setup Tab / Product List Tab. Products highlighted in yellow will be available when creating an order.
2. Once a new product is added in the translation listing, then the user adding the product needs to make sure the product is selected in their Product list to populate the product dropdown during order creation. Products listed here as AgSync products but will show in order creation as the AgTrax product name. If a product is not chosen (highlighted yellow), then it will not be available during order creation. To add the product to the listing, use the following steps:
 - a. Find product
 - b. Select it
 - c. Save product list

Add or Edit External Product List

Add new product to the external products list:

Click the following tabs; Account Settings / Integration / External Product List and then choose Add New Product. Then, input the AgTrax name as the External Product Name, AgTrax ID as the External Product ID, AgTrax Sellable UOM as the Sellable UOM, AgTrax density as the density in the specified AgSync units shown on the screen, and associate with an AgSync product. Remember to activate this product in the AgSync Product List Tab.

Edits to existing products:

Right click on external product name and choose Edit Product. In the next window search for the correct AgSync product to pair it with, click to choose it (*turns yellow*) and click save. Review your results to confirm adjustment was made.

Existing Programs (in products)

If the account has created programs before the integration, those will not work properly. The user must edit or remove any existing programs, and recreate them to ensure that all of their products saved in programs are related to an AgTrax product. This way when a program is used, it will use the AgTrax product ID.

Service Charge Item Data

AgSync allows users to setup and define service charges to be billed. Service charges are items you would like sent to AgTrax for billing the service of application.

To enter a service charge, go to the user settings located in the account at agsync.com. This is available by the main site by choosing settings, then clicking on the view/edit user settings button. Then choose Organization Settings and Charges. Add in each service charge you would like to use by filling in the name and partner ID as it is listed in AgTrax. The pricing that is entered on a service charge will be sent to AgTrax.

Upon creating an order, a Service charge can be selected. Upon export to AgTrax the selected service charge is exported to AgTrax with the quantity of acres applied.

The list of Service Charge's billing information is populated using the Application charge within the Billing editor located in the create/edit order windows and completion window in AgSync. This application billing information gets translated into the billing information for each service charge.

Customer/Billing Entity Account Cross Reference

Any Grower or Billing Entity must be cross referenced to an Account ID from AgTrax in order to be billed. Therefore when a new customer is to be added in AgSync, it is best practice to first look up the customer in AgTrax to see if they exist there. If they do not exist, first add the customer in AgTrax, then add the customer into AgSync with the corresponding AgTrax ID.

To assign the appropriate AgTrax ID to a customer:

1. In the profile tree, right click on the customer's name and click "View/Edit Profile Data".
2. In the pop-up window:
 - a. Click add partner.
 - b. Choose the partner of AgTrax.
 - c. Enter the AgTrax ID in the external ID box and click "Save".

To assign the appropriate AgTrax ID to a Billing Entity:

1. In the profile tree, right click on the customer's name and click "Edit Billing info".
2. Click on the edit (pencil) icon next to the billing entity you would like to use.
3. In the pop-up window:
 - a. Click add partner.
 - b. Choose the partner of AgTrax.
 - c. Enter the AgTrax ID in the external ID box and click "Save".

This will ensure the orders created in AgSync will correspond with the customers in AgTrax. Do this for each customer in your profile tree.

Field/Business Unit Cross Reference

AgSync has the ability to send AgTrax a Business unit on an invoice.

To assign an AgTrax Business Unit ID to a Field:

1. In the Profile tree, right click on a field and choose View/Edit Field Data.
2. In the External Billing ID box, enter the AgTrax Billing ID and click "Save".

Billing Partner Screen

The billing partner screen is currently located underneath Settings on the top right-hand side of AgSync, located at <https://account.agsync.com/Account/Organizations/AccountBillingPartner>. In this screen, the Billing partner chosen will need to be AgTrax. The Partner System ID value entered is the desired AgTrax Branch ID which corresponds to the Specified location in AgSync.

Account Billing Partners

Account	Partner System Id	Billing Partner
Test Applicator - Completion Test	1234	AgTrax

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The Gear Icon, located on the right hand side allows for the entry of AgTrax specific information. This includes the

- Username for contacting AgTrax API
- Password for contacting AgTrax API
- Company's Organization AgTrax contact Url
- If Include Note with Field Legal and Completion Personnel is chosen a comment is included on the AgTrax invoice stating, "Township Range Section Acres Field Crop" on the first line and "Personnel License Number Expiration Date" on the second line. This note is shown below any AgSync order/field notes sent to AgTrax.
- If this location is chosen as the dispatch location, send this location's branch id to AgTrax on the invoice header. This means that it does not matter whom the requester/retailer location is, the location listed as the Service Provider or Applicator will be sent to AgTrax as the location used as the Branch on the invoice header.
- Send AgTrax the lesser of Ordered or Completed area for services. By default, AgSync sends the quantity of acres applied shown as the Completed Acres from the Order Area section in the Completion popup in the AgSync main page. If enabled for the Account, the lesser of the Order Acres or Completed Acres from the Order Area section will be used in place of Completed Acres.

Sending of AgSync Work Order to AgTrax Invoice API

If the AgSync Retailer is setup with the AgTrax integration, then the Work order is flagged to be sent to AgTrax. To facilitate this action, a message is generated when a user sets the status of a Work Order to Completed – Verified on an order. The message is received by an internal message processor which converts AgSync Work Order data to the AgTrax invoice structure and post an invoice to the AgTrax endpoint.

AgSync Work Order to AgTrax Invoice Conversion

Upon saving an order as Completed – Verified in AgSync, the order data is sent to AgTrax to become an invoice.

The Location that is creating the order, known as the retailer on the AgSync order, becomes the branch from which the invoice is generated. Each product and service item listed on the AgSync order becomes a list of line items for the invoice with the quantities being calculated using the total product applied and total acres completed. One an invoice is sent to AgTrax for each billing account split setup as detailed in the Billing Information section below. If the location supplying the chemical is setup with AgTrax, then it is used as the location on the product, otherwise the retail location will be used.

Billing information

Within AgSync, splits for customers and fields may be set up as default. This default information carries over into the order. At any time a user may go into the order and choose to edit the billing information to change the billing information on the order. <http://ticket.agsync.com/osticket/kb/faq.php?id=12>

AgSync Work Order to AgTrax Invoice Validation checks

The following checks are performed while converting the AgSync Work Order data to the invoice to ensure all of the necessary partner information has been entered. If a check fails, the sending of the invoice is marked as a failure detailing the partner information missing and the user verifying the order will receive a message stating why.

- The Work Order has not been previously sent to AgTrax.
- All Products have AgTrax partner product information.
- A person listed as a Billing Entity is missing an AgTrax cross reference.

Retrieval of pricing data

If a service has a price set on it then it will be used. Otherwise, prices are set within AgTrax at the time of invoice creation.

AgTrax Invoice Formatting

One API request to create an invoice is sent to AgTrax per order. This request may create multiple invoices within AgTrax with each invoice for a single billing entity set on an order. If there are no splits setup and only a single Billing Entity on the order, then only one invoice is sent to AgTrax in the request. If splits exist, multiple invoices are sent to AgTrax within the same invoice request.

Each Billing Entity listed on the order is cross referenced into a corresponding AgTrax account (see Customer/Billing Entity Account Cross Reference section above for more information). AgTrax will apply any billing logic stored within AgTrax for the AgTrax account ID entered. AgTrax applies the following logic to each invoice AgSync submits.

- If a split does NOT exist, then the AgTrax will print a single invoice.
- If a split DOES exist, regardless of the split, AgTrax prints a master invoice that includes the invoice total AND an invoice for each customer on the split. Even if the split is 100% back to the invoiced customer, there will still be a master invoice and an invoice for each customer.
- If the split involves two or more customers, then AgTrax will print a master invoice, and then an invoice for each customer showing their amount owed for the split percentage.

Upon successful invoice creation you will not see separate invoice numbers for splits which AgTrax performs within AgSync.

Unsuccessful Invoice Creation

If an invoice was not created when the order status was changed to Completed – Verified, a message is returned to the end user detailing the reason for the failure. This could occur because of missing AgTrax information in AgSync, or an invalid response from the AgTrax API.

If a failure occurs, the user will need to fix the error, edit the completion record again, and choose save as Completed – Verified to attempt to create the AgTrax invoice.

Successful Invoice Creation

Upon successful invoice creation, the invoice IDs which are created are attached to the AgSync Work order as the AgTrax Partner ID. Partner IDs are displayed in AgSync on the orders tab in the Summary Column.