AgSync and Agvance / USER documentation

AgSync requires the user of Agvance to use Version 602680 or newer.

Customer Lists and Syncing

Agvance users will need to Sync their AgSync account with their Agvance account.

There are 3 ways to sync your customer information with Agvance.

- An entire Account can be synced. This is performed by right clicking on an Account and Choosing Sync with Agvance. The Account Sync can take some time to complete. For large accounts and slow connections, this may take upwards of an hour.
- All Customer information for an account can be synced. This is performed by right clicking on an account and Choosing Sync Account with Agvance (Customers Only). This option is specifically useful when there has been a new customer added.
- A Single customer can be synced with Agvance. To perform this Sync, right click on a customer and choose Sync Customer with Agvance. When chosen, the customer's information and all Farms and field underneath the customer is Synced.

Syncing of customer information is highly dependent on your Agvance install's connection and volume of customer, farm, and field information.

When syncing, the AgSync customer name is determined as the following:
If the last name from Agvance is not null, the customer will be named **last name, first name**.
Otherwise the first name is the AgSync name.

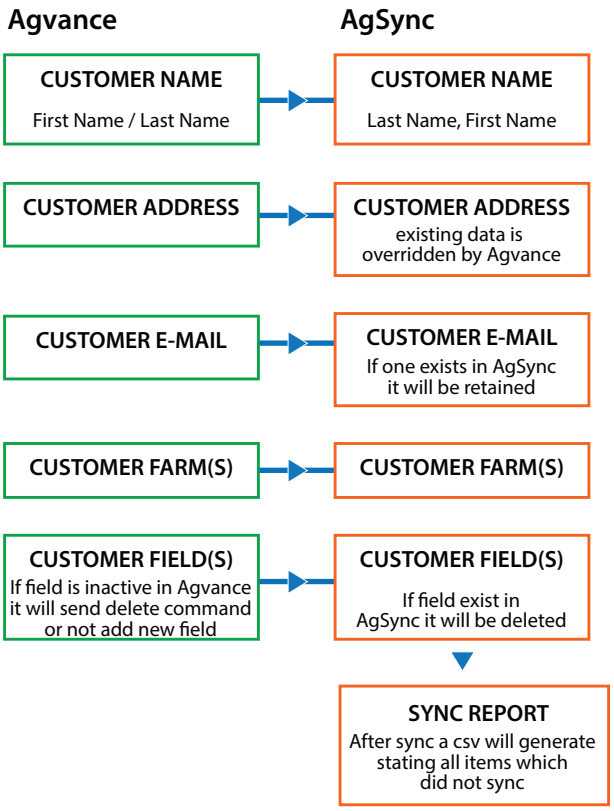
Example:
Agvance Name: First: John **Last:** Doe
Imports to AgSync as: Doe, John
Agvance Name: First: Smith Farm **Last:** _____
Imports to AgSync as: Smith Farm

When syncing, The Agvance customer address will override any existing AgSync address for that customer.
The Agvance customer email address, does not sync to AgSync and the email address listed in AgSync will be retained.

Upon completion of Syncing, the user gets a csv file which states the items which did not sync and why they did not Sync.

When Syncing Fields
If Agvance has: **FieldIsInactive = True**, and if the field is currently in AgSync then the field is deleted from AgSync. Otherwise the field will not be added to AgSync.

AgSync and Agvance Syncing Customer/Farm/Field Information



Things to know

- There are multiple ways to sync your customer information with Agvance.
- The account sync can take a significant amount of time to complete. It is highly dependent on the Agvance install's connection.
- Agvance fields that are inactive will not be created in AgSync.
- Agvance inactive fields will delete matching field in AgSync, if exists.
- Customers must be created in Agvance for systems to be in sync.
- AgSync handles notifications, Customer's email in AgSync is used.
- Fields deleted in AgSync will sync to delete field in Agvance.

Any changes in Agvance after Initial Sync will require another Sync, to pull the new data into AgSync. This is not automatic.

Tip: All new Customers must be created in Agvance. Customers created in AgSync will not sync back to Agvance.
Only Farms and Fields sync back to Agvance from AgSync.

Updates in AgSync Customer/Farm/Field and how they sync back to Agvance

AgSync	Agvance
Add or Change CUSTOMER	**No Update** Customer changes should be made in Agvance -then sync to put in AgSync
Add New or Change: FARM	**If no farm exists:** Add New Farm **If farm exists:** Update Farm Name
Delete: FARM	**If farm exists:** nothing happens **If no farm exists:** nothing happens
Add or Change: FIELD	**If no field exists:** Add New Field **If field exists:** **Update:** FieldDescription - Acres - County - Township - Range - Section - Notes - BoundaryWkt
Delete: FIELD	**If field exists:** delete field **If no field exists:** nothing happens

***Tip:** The farm name/key and field name/id is sent to Agvance as the first 8 characters of the AgSync name without the special characters: [!\=<>?/'.:]*

***Tip:** When creating new farms or fields after the initial sync, it is recommended to create those in AgSync as the system auto-syncs back to Agvance and doesn't require a lengthy re-syncing from Agvance to AgSync. If there was a problem during the sync, the user will receive a message giving the response from Agvance why the farm or field was not updated.*

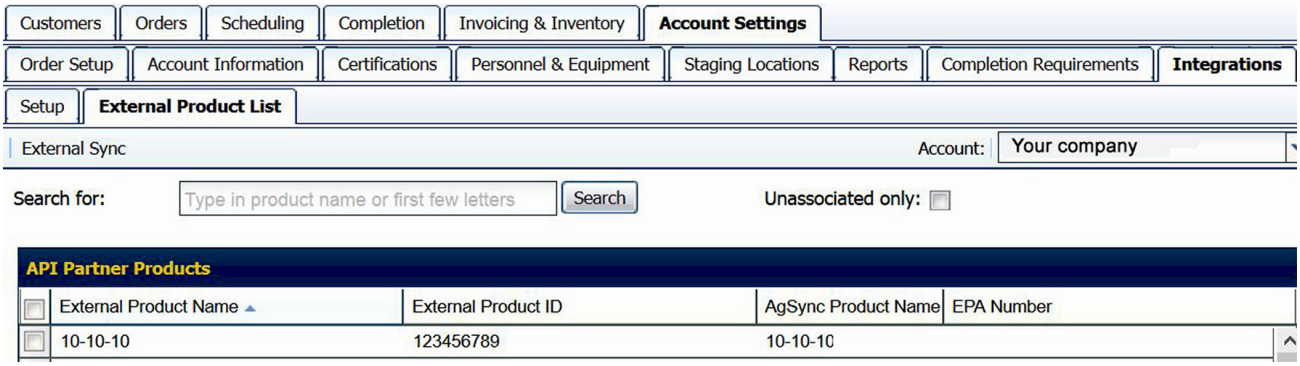
Agvance Product Lists

When syncing products or accounts, the sync may fail the first time. If this occurs try syncing a second time before contacting support.

Sync Agvance Products

Agvance users can sync their Agvance product list into AgSync using the External Sync function in the External Product list.

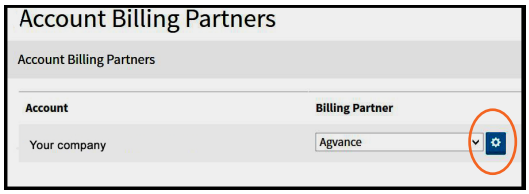
Product Sync
Products may be imported from an Agvance product listing by choosing External Sync located underneath the **1.)** Account Settings tab **2.)** Integrations tab **3.)** External Product tab. When chosen a queue job is performed. The job will retrieve a list of products for the specified location. Therefore only the chosen location in AgSync is synced. Then this list is compared with the existing list already in AgSync for the location and only new products are added. Once this is completed the product will need to be linked to the AgSync product listing before use.



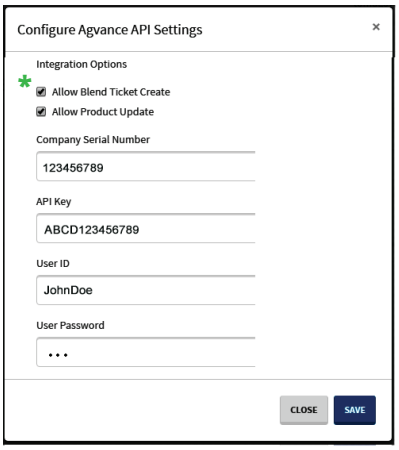
Agvance Settings/Options

Agvance users can edit the Agvance API settings.
To do this, in AgSync click on Settings, then View/Edit User Settings, then choose Organizations. In the Organization Settings click the Billing Partners tab.

Click the gear next to Agvance in the dropdown.

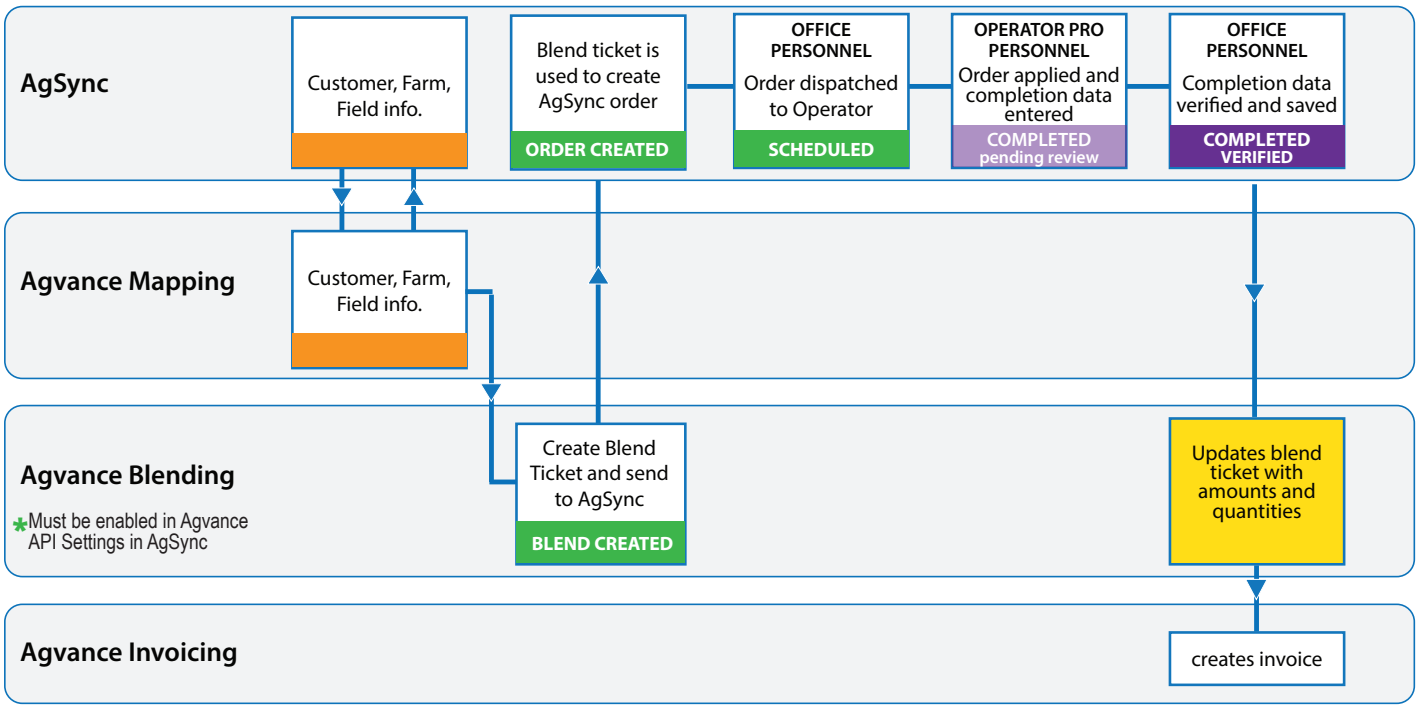


Enter API settings.
-Allow Blend Ticket Create
-Allow Product Update
-Company Serial Number
-API Key
-User ID
-User Password



Agvance Order Sync Information

Agvance users create blends information in Agvance. Once created blend information is sent to AgSync.
The order proceeds though the AgSync Dispatching process as normal. The work order is scheduled, sent to operator, and then completed.



As an order changes status an update is sent to Agvance on the Agvance Blend ticket. This will update the following on a blend ticket.

- AgSyncApplicationCompanyGUID
- AgSyncApplicationCompanyName
- AgSyncOperationTypeName
- AgSyncOperationTypeISVariableRate
- Blend Field
    - o AgSyncStatus
    - o AgSyncTargetApplicationDate
    - o AgSyncWindowDays

Agvance Product Update Blend Logic

If the Allow Product update option is chosen in the Account Settings, the following logic is used to determine how a product is updated or removed from an Agvance blend when an order status is set to Completed-Verified.

• If the blend product's id from the Agvance blend matches the product id for a product in AgSync then the sum of the product quantity used and uom is updated to match that which is entered in the completion record in AgSync. AgSync uses the Mixing update option within Agvance.

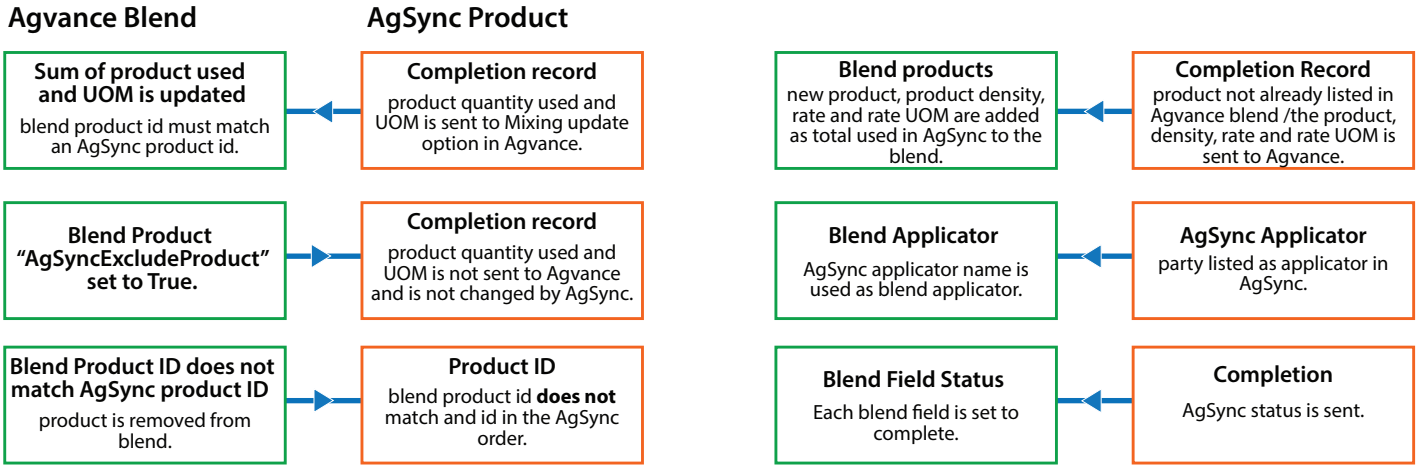
• If the blend product's AgSyncExcludeProduct is set to true checkmarked, then is left alone and not changed by AgSync.

• If the product's id does not match an id in the order in AgSync it is removed from the blend.

• If there is a product left in AgSync that did not match a product already in the Agvance blend, then it is added to the Agvance blend. When a product is added, the density, rate, and rate uom are entered as the total used in AgSync.

• The Blend Ticket's quantity is set to the total completed acres.

• The Blend Ticket's loaded date is set with the Current date and time.



Agvance Blend Ticket Create Blend Logic

If the Allow Blend Ticket Create option is chosen in the Account Settings a blend ticket may be created in Agvance. If an order's status is set to Completed – Verified a check is performed to determine if an Agvance blend ticket id already exists for the order. If there is no blend ticket set, a blend ticket is created.

Charges *(Services Charges)*

Accounts with API Accounting partners can add additional Services Charges to their orders.
In order for these charges to be available at order creation, they must be added to the Organization Settings in AgSync.

Adding Charges to Account

Inside AgSync click on Settings, then View/Edit User Settings, then choose Organizations. In the Organization Settings click the Charges tab.

1.) Choose the account to add charges to from the Account drop down.

2.) Click the Add Charge Button.

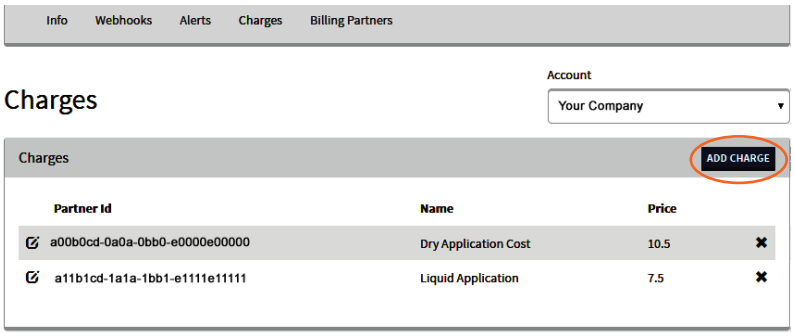
3.) Choose your account from the drop down.

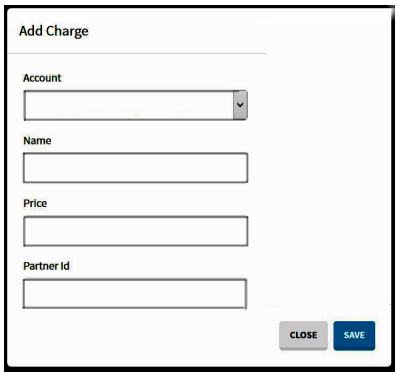
4.) Add a name for the charge.

5.) Add the Price. This is added per acre.

6.) Add the Partner Id from the accounting program. (this will facilitate sending the charges thru with the order).

7.) Click SAVE





Applying Charges to an Order

When creating an order if a service charge is needing to be added it can be selected from the Service Charge dropdown.