VantagePoint
E-NEWSLETTER

MONTHLY UPDATES FROM AGVANTAGE SOFTWARE - YOUR PARTNER IN AGRIBUSINESS

November 2024

Get Real, Get Dirty, Get Better

By Michelle Blomberg, President/CEO - michelleb@agvantage.com

These past few months, I've been challenging Team AgVantage in the topic of our customer relationships. In the industry of Ag-Accounting software vendors, I believe we are the BEST at customer service, but how do we become even better? How do we stay at the top and not become complacent with our attitude in this foundation of the company's success? Answer – Let's ask the employees and then, let's ask YOU!

Over 48 years, AgVantage Software has worked hard to connect to our customers, and it's become the backbone of our mission and continued growth. We are small enough to stay connected and continue to build on our highly diverse product line. As we grow, it can become harder for the right hand to know what the left is doing. So, let's get real, then let's get dirty so we can get better.

I asked each of the employees to list what they believe are the "best" things we do at AgVantage. And then I asked them to list the "worst" things. As a company that is led by someone who is most always positive (yours truly and maybe to a fault :)), the second ask was the hardest. It's hard to use the word "worst" when describing yourself, but I pushed it and asked them to do just that. So they then asked some of you for your feedback for this assignment.

THE PATH TO GROWTH IS FINDING THE COURAGE TO REFLECT ON OUR IMPERFECTIONS

"...cannot improve unless we are open to [negative feedback]..."

AgVantage SOFTWARE

Employee Owned. Customer Focused.   (877) 282-6353   support@agvantage.com   agvantage.com

 Here is the feedback we received for the AgVantage "BESTS":

- **Responsive Service:** You appreciate that you receive a response and get to talk to a "real" person, even it it's not an immediate solution. This reassurance helps you feel heard and acknowledged.
- **Constant Improvements:** You appreciate that the software is always being updated and improved, and enhancements are available every single week.
- **User Conference:** You love the User Conference and the chance to put faces to names, as well as connect to other customers.
- **Innovative company culture and employee ownership:** You can sense the creative and fun culture, which makes interactions more enjoyable.
- **Employees have 'Hands On" experience:** Many of the AgVantage employees have walked in our shoes, so they know firsthand what our needs are for success.
- An **"All in One" package** allows a "one-stop shopping experience". We use all AgVantage for our entire company needs, removing any finger pointing. One call!

 Here is the feedback we received for the AgVantage "WORSTS":

- **Call Back Times:** Sometimes the time to get a call back can be too long.
- **Communication Challenges:** Even with PULSE, we can feel confused with the communication, or even how to use the platform effectively.
- **"Good Enough Syndrome":** The product can feel rushed or not fully designed, leaving us with a "less than optimal" experience.
- **Knowledge Gaps:** We can get moved from person to person, and sometimes get different answers to questions.
- **Building custom reports:** We need an easier way to access the information.
- A **user forum** for idea sharing would be helpful.
- We'd like more **in person** and onsite training.

So with that, the AgVantage team would like to thank you for your input. Trust me when I say, it can be hard to hear negative feedback, but we cannot improve unless we are open to it and then, take what you say to heart. After you read this, if you have anything you'd like to add, both Best and Worst, all of us at AgVantage are here to listen. Please send your thoughts.

All of us at AgVantage wish you a Happy Thanksgiving and a very Merry Christmas and holiday season!
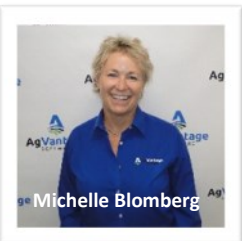
Pacific Northwest Training Recap
By Dillon Welter, Software Solutions Manager - dillonw@agvantage.com

AGVANTAGE 2024 PACIFIC NORTHWEST CONFERENCE

November 13-14, 2024
Northern Quest Resort & Casino
Spokane, WA

What a great turnout at the AgVantage PacNW Regional Training Event in Spokane, WA last week! We spent two days with our customers, where we packed in tons of EDGE training and overviews, tips and tricks, and just really great connections with our awesome PNW customers.

Michelle Blomberg

Day one started off with introductions and then we asked each person what their favorite animal was. Turns out there are a lot of dog and horse lovers in the group. Next, we heard from Michelle Blomberg on what's new and happening at AgVantage Software. Rachel Weinberg, Terri Schwarzrock, and I showed the group how to navigate EDGE as well as some fun tips and tricks, such as working in EDGE to get anything printed. We also went through opening multiple tabs and bookmarking the site.

Next, Terri navigated the group through Accounts Receivable and Inventory, highlighting the latest features. After breaking for lunch, Terri showcased EDGE Invoicing and the various operations it offers.

Dawn Klingfus joined us remotely to walk through the new Credit Operations Portal. This is a brand-new menu where users can track a customer's assets and credit history.
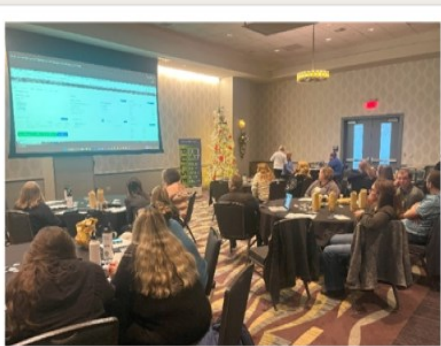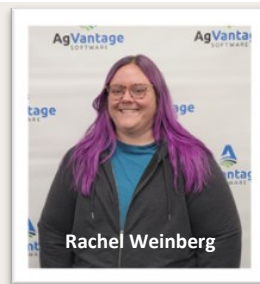
Terri Schwarzrock

Kristin Ehlen joined us remotely showing new features in EDGE Accounts Payable and Bank Reconciliation.

And then we rounded out the first day with Kristi Wendricks, who joined us remotely with a demo of EDGE Patronage.

Dillon Welter

Finally, Happy Hour!! We all gathered at the EPIC sports bar for some appetizers and beverages. We had a great time connecting with the awesome AgVantage customers.

With the diverse group of customers in attendance this year we decided to have Day 2 be full of smaller breakout sessions for different pieces of the software. This day, we kicked it off with a question to the group to share where they grew up and an interesting story about their hometown. This was a really fun activity that allowed us to get to know everyone even a little more.

Rachel Weinberg

Throughout day 2, we went through the CRM and POCKT highlighting online payments, as well as ASK and PULSE (these tools are documented at **www.agvantage.com** if you're not familiar). For the remainder of the day, we split into 2 rooms with EDGE Agronomy in one, and EDGE Grain in the other. This was a great time for customers to ask questions, allow us to jot their ideas on our "Idea Pad", and discuss with other customers how they handle certain processes.

Thank you to everyone who attended this event. I hope everyone had a good time and learned something new like I did!

End of Year eTraining and Forms for W2's and 1099's

AgVantage offers several e-training classes for End Year W2's and 1099s free of charge. Please see our website for the eTraining calendar to get signed up.

W2's and 1099's eTraining Classes offered in December
1099's Patronage & AP
Tuesday, December 17 1099's from 10:00 – 12:00 PM CST

Payroll End of Year & Electronic Filing of W2's
Thursday, December 19 from 2:00 PM – 4:00 PM CST
Friday, December 27 from 10:00 AM – 12:00 PM CST

Other eTraining Classes offered in December
Grain EOY and Deferred Payments
Thursday, December 12th from 10:00AM – 12:00PM CST

Patronage Current Year Distribution
Thursday, December 12 from 2:00PM – 4:00PM CST

End of year Forms
For several years we have teamed up with Quality Resources as an option for our customers to purchase end of year forms. They are no longer offering this service. However, there are many websites, including Amazon, Walmart, Office Max/Office Depot, or you can check with your local office supply provider, to order forms.
Due to the variety of printers used, if you do buy forms, please do a test print before running your forms to verify alignment.

1099's
We highly recommend using the 1099 substitution letters for patrons and/or vendors and filing returns online. If you do use the letters and file online you DO NOT need to purchase 1099 forms.

W2's
You will need the blank front, 4-up, horizontal perforated W2 forms that contain the required employee notice/instructions printed on the back. This is the form used for printing W2's from the AgVantage end of year menu. If you file the federal and state wage files electronically, you will need 1 sheet per employee.

Payroll End of Year Additional Information
Remember, the rules regarding electronic filing of tax forms of various types changed in 2023. Electronic filing of W2 forms is now required for any business with more than 10 combined forms of various types. If this will be your first year filing electronically you can place a support request to get set up with the data transfer for federal wage files. Additionally, registration for the Social Security Administration's Business Services Online (BSO) changed last year. If you did not use BSO to upload wage files last year, it's likely your User ID and Password are no longer valid to access BSO services. Find details and registration information at **ssa.gov/employer/**. This would be a good task to get taken care of before the end of the year. The new registration process could take two weeks to complete. Both recipient's copy and electronic filing of W2's are due by **January 31, 2025**.

Check your state requirements on electronic filing. Some states require all employers to file electronically, some state requirements match the Federal W2 count threshold, and other states fall somewhere in between.

Year-end information and 2025 tax table updates will be released on the ASK (AgVantage Skills and Knowledge) communication tool in EDGE. PULSE notices will also alert you to updates. Customers without EDGE can request information by placing a support request at **support@agvantage.com**. The Federal withholding tax tables for 2025 have not yet been released by the IRS. We will also continue to watch for state withholding table updates and unemployment wage base changes and post those by state on ASK.

1099's End of Year Additional Information

The rules regarding electronic file of tax forms for 1099's changed in 2023.

Final regulations for the Taxpayer First Act, provision 2301, were issued February 21, 2023, by the Department of the Treasury and the Internal Revenue Service. Treasury Decision (TD) 9972 amends the rules for filing returns and other documents electronically (e-file). These regulations reduce the 250-return threshold to generally require electronic filing by filers of 10 or more returns in a calendar year beginning in 2024, tax year 2023.

Example: During the calendar year 2024, for the tax year 2023 filing season, Company W, is required to file 4 Forms of 1099-NEC, Non-Employee Compensation; 4 Forms of 1099-DIV, Dividends and Distributions; and 2 Forms of W2, Wage Statement; for a total of 10 returns. Because Company W is required to file 10 returns as calculated during the calendar year 2024, for the tax year 2023 filing season, Company W must electronically file all of its tax year 2023, Forms 1099-NEC and 1099-DIV with the IRS, and Forms W-2 with the Social Security Administration.

As of the date of this newsletter the IRS has not yet published filing deadlines. Please refer to the IRS website for filing deadlines and additional information on filing requirements.

AgVantage Software Holiday Hours

The Holidays are just around the corner, and AgVantage would like to announce our Holiday Schedule for the upcoming season.

Thanksgiving

Thursday, November 28th, 2024 – AgVantage Offices are Closed for the Thanksgiving Holiday

Friday, November 29th, 2024 – AgVantage Offices are Open 8 am CST—12 pm CST

Christmas

Tuesday, December 24th, 2024 – AgVantage Offices are Open 8 am CST—12 pm CST

Wednesday, December 25th, 2024 – AgVantage Offices are Closed for the Christmas Holiday

New Years

Tuesday, December 31st, 2024 – AgVantage Offices are Open 8 am CST—3 pm CST

Wednesday, January 1st, 2025 – AgVantage Offices are Closed for the New Year Holiday

Enjoy the Holiday Season, no matter how you celebrate!

Upcoming eTraining Class Schedule

By Elise Musall, Customer Services Specialist - elisem@agvantage.com

Hello everyone!

Here is an overview of our upcoming month's eTraining class schedule[**]. Please take a moment to view our eTraining calendar under the **Training** section via the link below and click the blue button to register for any of our eTraining classes[*].

https://agvantage.com/Services.html

Upcoming eTraining class listings are also available via the green banner at the top of applicable EDGE menus.

Please email **elisem@agvantage.com** or **support@agvantage.com** for any questions or concerns about eTraining.

Thursday 12/12 10am—12pm CST 2pm—4pm CST	**Grain EOY & Deferred Payments** **Patronage Distribution**	**Thursday 12/19** 2pm—4pm CST	**Payroll End of Year and Electronic Filing of W2 (no charge)**
Tuesday 12/17 10am—12pm CST	**1099s Patronage and AP (no charge)**	**Friday 12/27** 10am—12pm CST	**Payroll End of Year and Electronic Filing of W2 (no charge)**

*eTraining fees may apply. Please see the Training section via the link below for single class rates or to sign up for company wide monthly/annual subscription options.

https://www.agvantage.com/Services.html

**Classes are subject to time and date changes. Anyone already registered for a class will be notified of a time or date change.

Update on New Software Releases
By Tim Underwood, VP Development   -   timu@agvantage.com

AgVantage strives to meet your agribusiness needs by updating our software platforms on a regular basis. The following is a list of the various AgVantage software platforms and the many new software releases.

Accounts Payable
CoBank Positive Pay - Blank or A will default to A in position 19 (644213)

Accounts Receivable
Payment history for payment on multiple terms - Show total paid on screen (623756)

EDGE Agronomy
Plan - Add blend adjustment feature to formulation section (572445)

EDGE Accounts Receivable
Add budget standard edit report (510071)
Upload prices from Excel spreadsheet (590070)
Payment breakdown - Show on customer balances (613017)
Ship to delivery instructions flag to print on invoice (620674)
Ability to import items from Excel spreadsheet (631639)
Print multiple invoices at once from balances and invoices (632842)
Updating prices from a spreadsheet enhancement (633180)
Ability to edit margin percent and dollars on item price level (635129)

EDGE Accounts Receivable (cont)
AR ACH use multiple accounts (637998)
Open customer portal in inquire mode from balances and invoices (643021)
Filter invoice breakdown by manufacturer on sales by manufacturer report (646478)
Activity report - Include payment discounts and adjustments (648008)

EDGE Energy
Add fields to the dispatching grid (568255)

EDGE Grain
Add CSV option to handling detail report (588715)

EDGE Inventory
Inventory adjustment listing report - Correct margins (651675)

EDGE Patronage
Preferred stock - Print dividend checks (493233)
Preferred stock - Assign check to reference numbers (493234)
Preferred Stock - Update after check run (493236)
Prior year equity redemption report - Add CSV option (616328)
Change "tally" to "reference" on prior year redemption (649739)

EDGE Seed
Update Syngenta error handling (579481)

Add - Identify split plans on the Seed Grower Plan Grid (607923)

Archive products (612268)

Energy
Add route sequence to ticket file (410033)

Interfaces
Importing inventory receivers from FMS to include lots (603646)

Murray Blender - New JSON export layout (616802)

Use John Deere API to send prescription files to Aglogic (622935)

AgLogic Integration (625328)

John Deere API - Attach prescription files to machines (644967)

Winfield - Add message requests to HTTP headers (646635)

PC Grain Scale
Integrate MCI Tester (594070)

PC Invoicing
Filter invoices in payment screen by term code (628830)

Remove Rescue (632708)

ETA
Add update notice when user opens PC ETA (571922)

Ability to view time records with an invalid work code (595681)

Migrate ETA programs to .Net 4.7.2 (620118)

Export to ADP as CSV (621832)

Don't allow inactivate employee if change request or max hours (646172)

Remember to check your PULSE for more details on these EDGE product enhancements.

AGVANTAGE
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