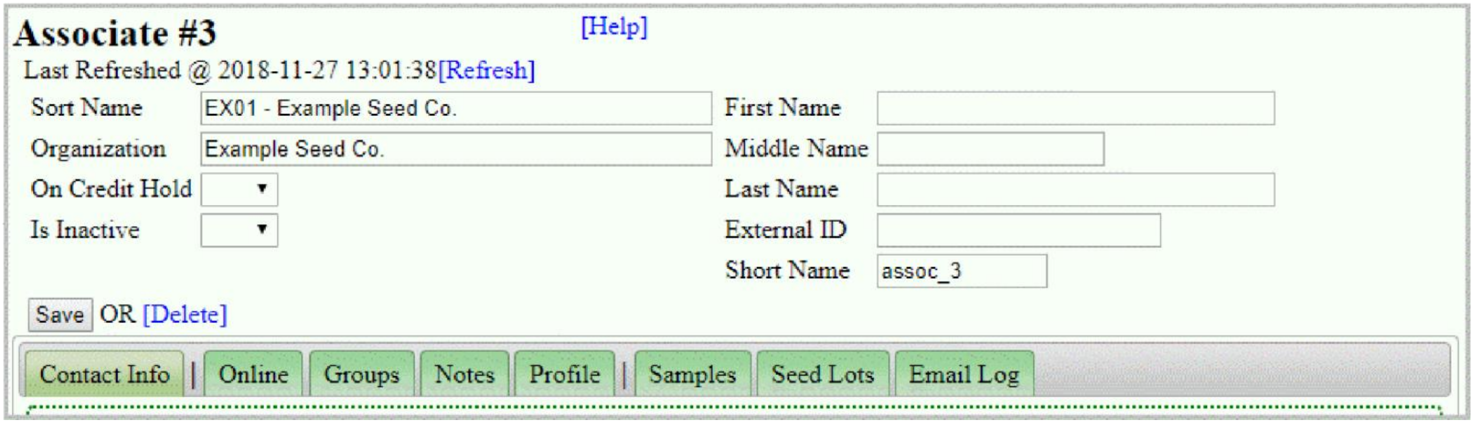
# Associates

Enter the identifying information of your customers.




| | |
|---|---|
| Organization (required) | The Company name of the customer, or the name of the individual if its not a company. |
| Sort Name (required) | The name the system uses when sorting the associates for exports,reports and other lists. This is also the name used when looking up an associate when entering samples,fields,billing, etc. (required |
| On Credit Hold | If set to yes an "ON HOLD!" alert will appear next to the associates name on various screens. Can be used if a customer has fallen too far behind on payments. |
| Is Inactive | If set to yes, the customer will be hidden from the various lookup forms throughout the system (e.g when entering a new sample, Inactive customers will not be shown in the lookup.) |

## New Associate

Enter a new Associate from this screen. Choose an Assoc ID, or let Pure Harvest assign one(recommended)

The "Primary" Address & Phone number can be provided at the time of creation.

If an email address is provided, it will be used as the 'Primary', 'Sample PDF', and 'Invoice' types. See the Email section for more about email types.


## Associate Detail Tabs

### Contact Info

#### Addresses

An address type of **Primary** is required and will be used by default when any sort of mailing address is displayed. Certain address types will be used on certain reports instead, if they are provided.

An address type of **Bill To** will be used as the mailing label when creating invoices.

Other types of addresses can be entered for reference, but are not used by the system.

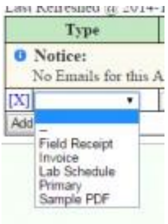
#### Phones

Different types of phone numbers. A type of 'Primary' is required.

#### Emails

Various Email types can be entered to control who gets what documents. To have a document go to more than one email address, add another row with the same Email type for each additional email address.

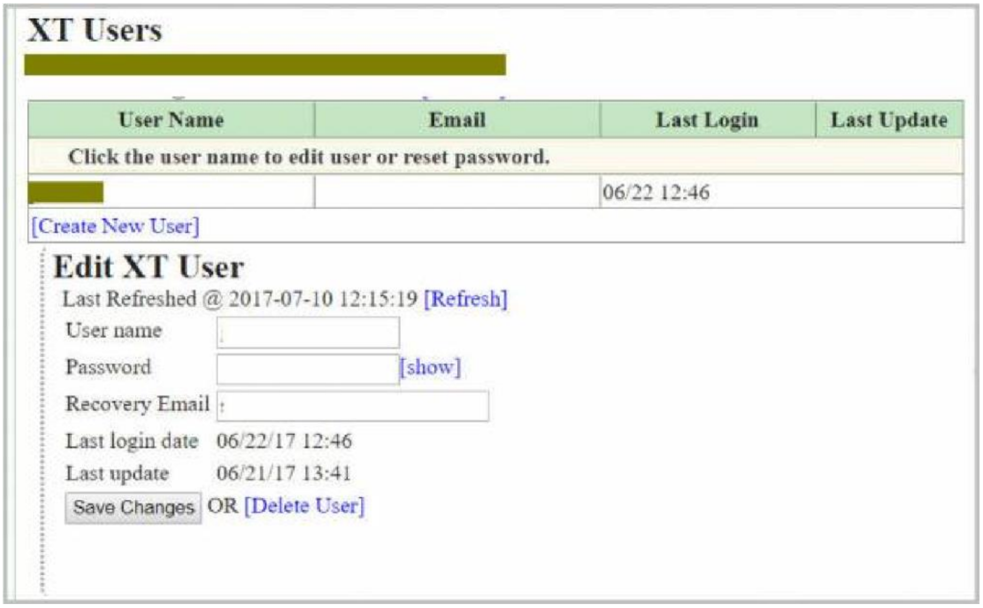
Email Types:

| | |
|---|---|
|  | * Sample PDF - Used when sending the lab reports.<br>* Invoice - Used when sending out the invoices.<br>* Field receipt - Used when sending the notification of Field applications that have been entered.<br>* Lab schedule - Used when sending out the summary of daily lab activity for that customer<br>* Field schedule - Used when sending out the summary of daily field activity for that customer |

## Online

### XT Users

Each associate can assign multiple users for online access. You will be able to add, remove and update users from this screen. Click on the user name (blocked out in green) to open the edit window.
Your XT user will also be able to update their password & recovery email. You will be able to see their actual user and password from this screen.




The User/pass changes are immediate for your XT users. There is no delay while waiting for data to copy to an external database.

### Connected Accounts


This form lets you look up an associate and add them to a list of connected accounts.
When the Associate logs on to the Track interface to access results online, they will also be able to view results that have been shared with any of the associates listed in the connected accounts.

For example: “Some Seed Company (101)” connects to “Another Seed Company (102)” This means all of the results shared with 102 will be visible to 101 when they log on to the Track interface. However, this connection only goes one way, so 102 would not be able to see results that had been shared with 101, unless you also open the connected accounts for 102 and add 101 to their list.

## Groups

Add the associate to a group, certain exports (like the Contact List) can be restricted to a certain group. For more information see Associate Groups

### Notes

Any comments or additional information about the associate can be added as a note.

### Profile

Overview of the Associates lifetime activity. Shows information such as # of samples/fields per year.

### Samples

A version of the Sample Search Screen, already restricted to the samples owned by the associate.

### Seed Lots

A version of the Lot Search Screen, already restricted to seed lots owned by the associate

### Email Log

A version of the Email Logs Screen, already restricted to emails sent to the associate