Associate Groups

2024-07-02

Menu: Associate → Assoc Groups

Overview

This screen can be used to Create & Manage Associate groups. Many exports, such as the Contact List, can be restricted to a single group. Some Groups have special meaning in Pure Harvest. Associates can be in multiple groups.

Members

The Members tab lists all the associates in the group, if an Associate has been set to "Inactive" the customer name will start with an "(I)" and be displayed in red.

Members can be added to the group by looking up individual associates, or by looking up another group. When adding associates from another group, the system will automatically add any associates from the group selected to the current group (Associates already in the group will be skipped)

Charges

This tab has a form which can be used to create charges, and a form which lists all the charges already created, if they have not been invoiced.

Create Charges

When you create charges from this form, a charge will be created for each customer in the group, using the Group Name as the Reference for the charge. Charges previously created by this form will be replaced, if they have not been invoiced or manually edited.

Charges Created for group

After charges have been created, the charges will be shown in a form below. Only charges that have not been invoiced will appear in the list.

Choose a group: [Grower ▼] or [Create New Group]

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Name [Grower]   Annual fee [____]

Description [Grown By Assoc lookup on Field Applications is restricted to this group. Grown By Assoc is used to in billing to apply fees by Variety & Grower]

[Save Changes] OR [Delete Group]

| Members | Charges | Email List |

Associates in Group: [Hel

Grower

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┌─Add To Group───

ℹ **Notice:**   Add a single associate, or all associates from an existing group

By Associate: [____]   By Group: [____] *Only associates not already in this group will be added*

ℹ **Notice:**   Inactive associates are displayed in red, and also with an (I) at the start.

Assoc ID	Associate Name	Full Name
[X] 2198	AJ	Adam & Andy Jensen
[X] 1507	All	
[X] 1800	Art	
[X] 824	B &	