

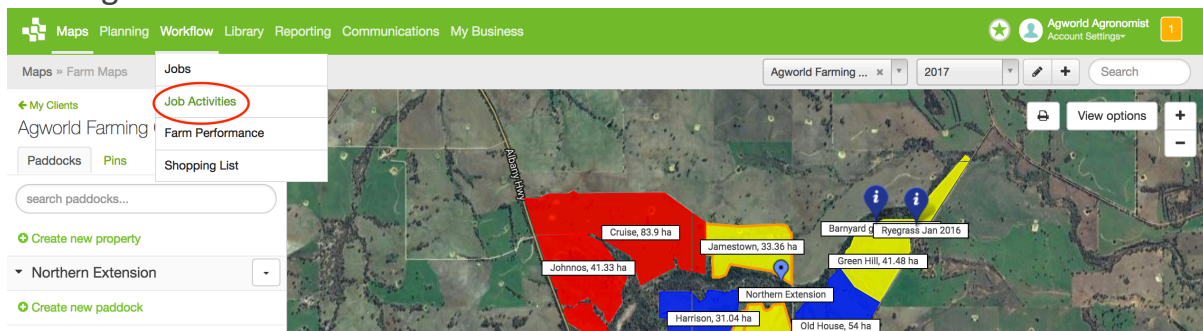


How to Bulk Convert to Actuals on the Agworld Website

Multiple Recommendations, Work Orders and Plans can be converted to Actual at the same time. This is done through the Workflow > Job Activities page.

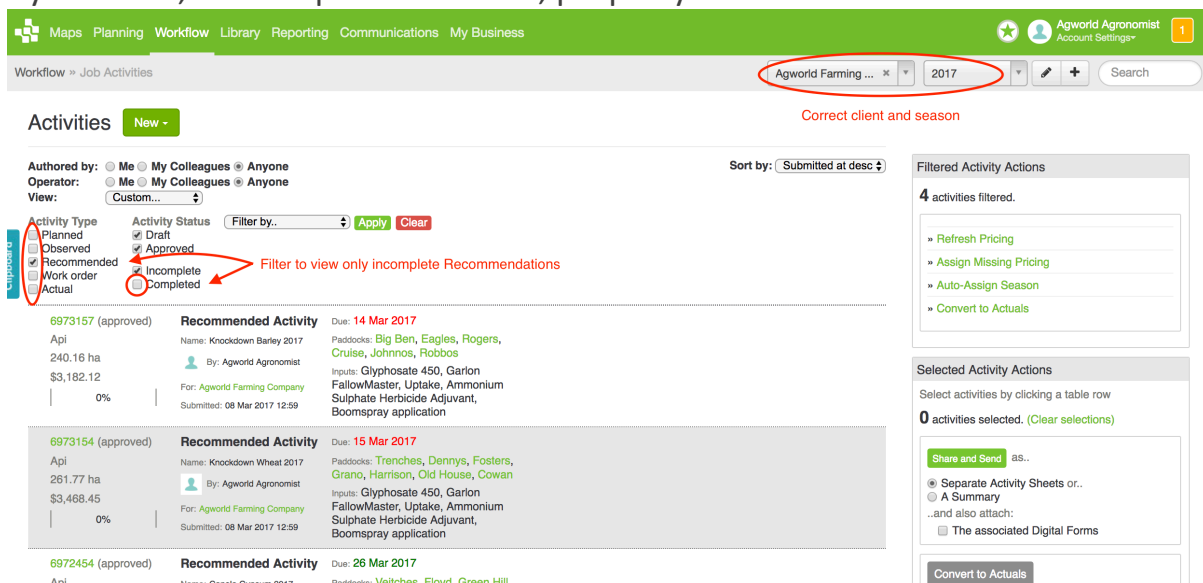
Step 1, Job Activities:

Navigate to job activities by hovering your mouse over Workflow and then clicking Job Activities



Step 2, Filter:

From the Job Activities page, filter to the correct client and season first. Now use the jobs filters to find the activities you would like to convert. For example, you can click on only the activity types you'd like to view (e.g. recommendations) and choose only the incomplete recommendations (those that haven't yet been converted). Additional filters can be used in the "Filter By" section, such as paddock name, property etc.



Step 3, select activities:

Choose the activities from the list that have been completed and you would like to convert to actuals. This is done by simply clicking anywhere on the job. You can select as many jobs to convert as you'd like. Once you have selected the jobs you'd like to convert, click on the grey "Convert to Actuals" button, under the Selected Activity Actions tab.

The screenshot shows the 'Recommended Activity' list with four items. A red arrow points to the 'Convert to Actuals' button in the 'Selected Activity Actions' panel on the right. Another red arrow points to the 'Convert to Actuals' button in the 'Filtered Activity Actions' panel on the right. The 'Convert to Actuals' button is circled in red in both panels.

Recommended Activity List:

Activity ID	Name	Due Date	Submitted
6973157 (approved)	Knockdown Barley 2017	14 Mar 2017	08 Mar 2017 12:59
6973154 (approved)	Knockdown Wheat 2017	15 Mar 2017	08 Mar 2017 12:59
6972454 (approved)	Canola Gypsum 2017	26 Mar 2017	08 Mar 2017 12:22
6972436 (approved)	Knockdown Canola 2017	19 Mar 2017	Converted into: 7061659

Filtered Activity Actions:

- Refresh Pricing
- Assign Missing Pricing
- Auto-Assign Season
- Convert to Actuals

Selected Activity Actions:

Select activities by clicking a table row

3 activities selected. (Clear selections)

Share and Send as..

- Separate Activity Sheets or..
- A Summary
- and also attach:
- The associated Digital Forms

Convert to Actuals

To customize the summary view..

Edit Summary

Or force

Refresh Pricing

Step 4, fill in dates:

The Due date on the recommendation should auto-fill into the completed date column. You can keep these, or override them with correct dates if they differ. Once the dates have all been added, click on the green Save button.

The dialog box 'Convert Selected Activities to Actuals' is shown. It has columns for 'Activity', 'Started At', 'Completed At', and 'Remove Activity'. The 'Completed At' column is highlighted with a red box. The 'Save' button is circled in red.

Convert Selected Activities to Actuals

Activity	Started At	Completed At	Remove Activity
Knockdown Canola 2017 Paddocks: Jamestown, Floyd, Green Hill, Veitches Inputs: Glyphosate 450, Garlon FallowMaster, Uptake, Ammonium Sulphate Herbicide Adjuvant, Boomspray application		2017-03-19 00:00	
Knockdown Wheat 2017 Paddocks: Old House, Grano, Dennys, Harrison, Cowan, Fosters, Trenches Inputs: Glyphosate 450, Garlon FallowMaster, Uptake, Ammonium Sulphate Herbicide Adjuvant, Boomspray application		2017-03-15	
Knockdown Barley 2017 Paddocks: Big Ben, Johnnos, Eagles, Cruise, Rogers, Robbos Inputs: Glyphosate 450, Garlon FallowMaster, Uptake, Ammonium Sulphate Herbicide Adjuvant, Boomspray application		2017-03-14	

Enter in the completed date and click on Save

Mark all as completed

Alert others of this change

Save Save as Draft

Step 5, clear selections:

You'll notice that the recommendations we converted are still selected under the Selected Activity Actions. Before you move on to another client, or more recommendations, just click on the (Clear selections) button to remove the previous recommendations.

Activities **New**

Authorized by: ☐ Me ☐ My Colleagues ☐ Anyone
Operator: ☐ Me ☐ My Colleagues ☐ Anyone
View:

Activity Type: ☐ Planned ☐ Observed ☒ Recommended ☐ Work order ☒ Actual
Activity Status: ☒ Draft ☒ Approved ☐ Incomplete ☐ Completed

Filter by: **Apply** **Clear**

Sort by: Submitted at desc

6972454 (approved) **Recommended Activity** Due: 26 Mar 2017
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0%

Name: Canola Gypsum 2017
By: Agworld Agronomist
For: Agworld Farming Company
Submitted: 08 Mar 2017 12:22

Paddocks: Veitches, Floyd, Green Hill, Jamestown
Inputs: Gypsum (fine screened)

Now click on (Clear selections) before converting more recommendations to actuals

Filtered Activity Actions
1 activities filtered.
» Refresh Pricing
» Assign Missing Pricing
» Auto-Assign Season
» Convert to Actuals

Selected Activity Actions
Select activities by clicking a table row
3 activities selected. (Clear selections)
Share and Send as..
• Separate Activity Sheets or..
• A Summary
..and also attach:
☐ The associated Digital Forms

That's it! Your activities have been converted to Actuals.