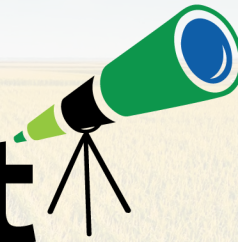


VantagePoint

E-NEWSLETTER



MONTHLY UPDATES FROM AGVANTAGE SOFTWARE - YOUR PARTNER IN AGRIBUSINESS

December 2023

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AgVantage 2024 Executive Conference

By Lisa Sick, VP Marketing & Conferences - lisas@agvantage.com

March 6-8, 2024 Savannah Georgia

Happy Holidays!

We are excited to team up with executives and leaders of agri-businesses from all around the USA to experience:

“The Champion’s Compass – Navigating Your Team’s Playbook”

Team talks, CEO interviews, in-depth discussions, and the tech tools to navigate successful business and lead winning teams are all part of this fantastic event. Join us in Savannah for this event that will “Knock it out of the park”!



The Agenda:

Plan to arrive Wednesday night, March 6th for a Welcome Reception on the JW Marriott Moon Deck Rooftop Bar from 6:30 – 8:30 pm. Full bar, networking, and famous southern cuisine.

Thursday – Friday, March 7-8, 2024

Our lineup is stacked with power hitters that know how to swing for the fence, and don’t often share their playbook.

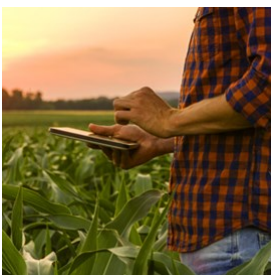
(continued on page 2)

“Join us in Savannah for this event that will ‘Knock it out of the park!’”

- **Michelle Blomberg**, CEO of AgVantage, will talk about the amazing team culture and leadership at AgVantage Software.
- **Ross Bernstein**, best-selling author, has interviewed thousands of professional athletes and coaches of championship teams. He will share “The Champions Code” that identifies champions in sports and the correlation to success in business. Learn about their moral compass used to stay true to being people who we trust, who we like, and who just “get it” — CHAMPIONS.
- **AgVantage Leaders** will show the latest enhancements to technology in AgVantage Software.



- **Game-Changers: CEO Interviews** are conversations you have the opportunity to listen in on as Michelle interviews successful leaders about their company culture, growth, and leadership styles.
 - Keith Devoe, CEO of Roggen Farmers Elevator Association in Colorado
 - Tom Boland, CEO of Skagit Farmers Supply in Washington
 - Lisa Doan, CEO of AgBest in Indiana
 - Rob Larson & Tim Clemens, CEOs of ProVision Partners Coop in Wisconsin
 - Heath Barnes, CEO of Mercer Landmark in Ohio
- **Sonny Perdue**, former U.S Secretary of Agriculture. Enjoy Southern Afternoon Tea with Sonny as he shares "Sonny's Life Journey - a veteran's view on the future, based on the past".
- Defense Wins! Let’s Talk Security with **David Anderson**, Clifton Larson Allen LLP. He will talk about the best defense for your business and your team around security and protection.
- **Chalk Talk: Utilizing Your Tech Tools**. AgVantage experts will help you “cover all the bases” by walking through the tech tools you should have in place:



- POCKET for your customers
- AgVantage CRM, Document Exchange, and ASK for your staff
- AgVantage EDGE & PULSE for your management team
- Financial Drilldowns for your Board of Directors

Get on Deck: “Georgia Queen” Savannah Riverboat Dinner Cruise

Relax with us and see the amazing view of one of the most famous waterfronts in America. Enjoy a delicious buffet dinner featuring local low country cuisine as you listen to live southern-style entertainment on our two-hour dinner cruise from 7-9 pm Thursday night.



(continued on page 3)

The meeting ends at noon on Friday, but the fun and networking continues! Make your own plans to explore Savannah. We have suggestions listed on our website and there are many more options.

- Savannah Historic Hop On/Off Trolley Tour
- Historic Squares and Forsyth Park
- River Street & The Savannah River
- Ghost & Gravestones Haunted Savannah Trolley Tour or other Ghost Tours
- Golf on any of the 23 golf courses in Savannah or Hilton Head island is 37 miles away and there are 24 on-island championship golf courses and over 40 courses in the Hilton Head Island - Bluffton area.

Event Registration

Please register for the event (\$950 per person) by 2/1/2024 using the link on our website at: agvantage.com/executive

Hotel Reservations

JW Marriott in Savannah Plant Riverside District

Make your hotel reservations online using the link provided on our website or call (800) 228-9290 for hotel assistance and ask for the AgVantage Group Rate.

The **JW Marriott in Savannah Plant Riverside District** is one of the most gorgeous buildings in Savannah. Located in the heart of historic Savannah on the riverfront, with countless activities a short walk away. The JW Marriott is a perfect blend of the historic and modern-day designs seen around Savannah and wholly unique to the world. Explore the downtown Savannah shopping district, browse a nearby art gallery, eat at one of the hotel's restaurants, visit our riverside Savannah bars, or embark on one of the city's various walking tours. Once a power plant, Plant Riverside District represents the beauty of progress.

Thank you to our exclusive Sponsors

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AgVantage Software Holiday Hours

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

New Years

Monday, January 1st, 2024 – AgVantage Offices are Closed for the New Year Holiday.

Enjoy the Holiday Season, no matter how you celebrate!



End of Year W-2s and 1099s

By Kristin Ehlen, Corporate Controller - kristine@agvantage.com

Kristi Wendricks, Installation & Project Manager - kristiw@agvantage.com

AgVantage offers several e-training classes for End of Year W-2s and 1099s free of charge. Please see our website for the e-training calendar to get signed up.

Important Information from the IRS

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 tax year 2023, filing season, Company W, is required to file 4 Forms 1099-NEC, Non-employee Compensation, and 4 Forms 1099-DIV, Dividends and Distributions, 2 Form W-2, 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 tax year 2023, filing season, Company W must electronically file all its tax year 2023, Forms 1099-NEC and 1099-DIV with the IRS, and Forms W-2 with the Social Security Administration.

Details on this regulation can be found here: [IRS and Treasury final regulations on e-file](#).

Beginning January 2024, you will no longer be able to electronically file using your existing TCC. Please visit <https://www.irs.gov/e-file-providers/filing-information-returns-electronically-fire> or contact your tax professional for additional questions.

1099-PATR, 1099-INT, 1099-DIV

Important Due Dates:

Recipients Copy: Jan. 31, 2024

Electronic Filing: Mar. 31, 2024

Review of the calculations for 1099 PATR boxes:

- Box 6 Section 199A(g) deduction. Edge Patronage will calculate these figures for you.
- Box 7 Qualified Payments (Section 199A(b)(7)). This can be calculated differently if the cooperative's 199A(g) deduction was limited by wages. Check with your auditors on how this should be calculated. Place a support call and we can populate it for you otherwise it will usually be the sum of Boxes 1 and 3 for most cooperatives.
- Box 8 Section 199A(a) Qualified Items is the sum of Boxes 1, 2, 3 and 5.
- Box 9 Section 199A(a) SSTB (Specified Service Trade or Business) for most cooperatives and will be 0 however we recommend you verify this with your auditors.
- Box 13 Specified Coop should be checked for most cooperatives but again, we recommend you verify this with your auditors.

Our recommendation is to verify the amounts in these boxes with your auditors.

Edge Patronage will now run the entire End of Year process for 1099s

Maintaining PATR/INT/DIV tax file, Balancing the totals for all 1099s, Calculating the Section 199A(g) Deduction, Calculating Grain Payments, Printing 1099 Letters and creating the 1099 file for uploading to the IRS FIRE website.



Payroll End of Year and W-2s

By Cheryl Simpson, Customer Services Specialist - cheryls@agvantage.com

Please take advantage of the payroll end of year e-trainings. E-trainings for end of year payroll procedures and electronic filing of W-2s have no registration fee. If you missed the trainings, you can access the recorded videos on the Edge Payroll main menu.

Upcoming E-Trainings:

Thursday, January 11th 2 pm – 4 pm; Electronic Filing of W-2s

Take note of the changes to electronic filing mentioned on page 4. Electronic filing of W-2 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 please contact support to get set up with the data transfer for federal wage files. Additionally, registration for the Social Security Administration's Business Services Online (BSO) has changed. If you have used BSO in the past to upload wage files your User ID and Password are no longer used to access BSO services. You must use a Social Security online account, Login.gov, or ID.me credential to access the BSO site. 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 recipients copy and electronic filing of W-2s are due by January 31, 2024.

Check your state requirements on electronic filing. Some states require all employers to file electronically, some state requirements match the Federal W-2 count threshold, and other states fall somewhere in between. Again, if you have not previously filed your state wage reports electronically please contact support to get set up. As always, you can also contact support with issues or questions on other parts of the year end process.

Check your email inbox for the information and ordering form to order W-2 forms from Quality Resource Group. Jason Kaufmann is your contact at QRG for questions and to order your W-2 forms.

Year end information and 2024 tax table updates will be released on our new 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 are still listed as draft status on the IRS website. Watch for those to be added to ASK after they have been released from draft status, and we've have a chance to test the new tables. We will also continue to watch for state withholding table updates and unemployment wage base changes and post those by state on ASK.



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 via the link below and follow directions to register for any of our eTraining classes* .

https://www.supersaas.com/schedule/agvantage/AgVantage_E-Training_Schedule

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

Wednesday 1/10/24

10am—12pm CST **Edge Energy Dispatching & Mapping**
 2pm—4pm CST **Patronage Distribution**

Thursday 1/11/24

10am—11am CST **Edge Accounts Payable**
 2pm—4pm CST **Payroll Electronic Filing of W2’s (No Charge)**

Wednesday 1/17/24

10am—12pm CST **1099s Patronage & AP (No Charge)**
 2pm—4pm CST **Edge & eAgVantage Admin**

Thursday 1/18/24

10am—12pm CST **Emailing Grain with Electronic Signatures**
 2pm—4pm CST **Edge Agronomy**

Wednesday 1/24/24

10am—12pm CST **Edge Seed Shipments and Dispatching**
 2pm—4pm CST **Processing Web Payments**

Thursday 1/25/24

2pm—4pm CST **1099s Patronage & AP (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 on 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.

ACH AR

Web Pay ACH batch out of balance (606220)

Accounts Receivable

Ability to email invoices by term code (506493)

Edge Accounts Receivable

Verify if salesman number has sales/orders in last year before allowing delete (575148)

Add print sales report - needs authority (590967)

Term setup - allow for blank year (614917)

Add field 'Send to Printing Service' in statement group code maintenance (618575)

Edge Energy

Include open comments in fuel delivery PDF (600509)

Allow sorting of fuel delivery report by sequence when printing PDF (600510)

Edge Grain

Add ability to edit description on the long/short for hybrid contracts (588327)

Add AR balances to account details and add COD code description (475429)

Add position date to sales contracts (588884)

Selecting lots oldest to newest when settling by bushels (614362)

Edge Payroll

Ability to email attachment with paystub (606856)

Edge Patronage

Print estate report (493271)

Add AR customer portal button (594660)

Common stock reports export to a CSV (608973)

Edge Seed

Adding salesman restriction by location (564982)

Ability to sort shipping document by hybrid (565965)

Add seller name/manufacturer column to the shipment screen (582399)

Add column sort and finance type to grower plan grid (590595)

Filter to select multiple crops on grower plan and warehouse report (591073)

Winfield PAL enhancement For multiple line level error (595426)

Ability to sorting plan by Relative Maturity when printing PDF (596598)

Seed dispatch - include fees and treatments (602245)

Interfaces

Tank monitors - Job completes if error occurs and sends email identifying tanks in error (539841)

Pull item, driver, and route from tank file when call is posted (611642)

PC Grain Scale

Add option to maintain frequent hauler list (533061)

Determine default scale for gross and tare weights (580760)

Add ability to not populate crop from RFID Tag (582634)

Include grades in loads report export to CSV (589070)

Load customer on weigh only based on CHS load (590962)

Populate CHS load number in notes field on weigh only ticket (592945)

PC Invoicing

Filter lots based on sales location (605154)

PC Time

Updated time card design for IBMi and allow time off to count towards overtime (565976)

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

