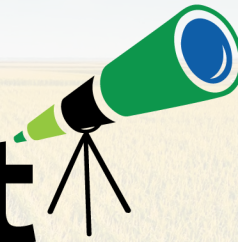


VantagePoint

E-NEWSLETTER



MONTHLY UPDATES FROM AGVANTAGE SOFTWARE - YOUR PARTNER IN AGRIBUSINESS

November 2023

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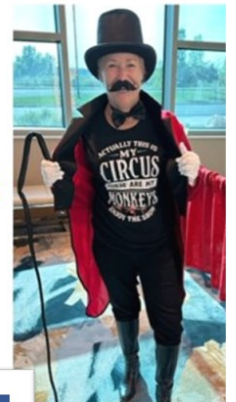
Love IS the Meaning of Life

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

This newsletter marks the month of my 60th birthday and also, I just celebrated my 27th year at AgVantage Software. So with all of that in mind, I decided to write this newsletter with pictures and hope you can get to the message I'd like to impact you with this month. If you need a hint, check out the title. :)



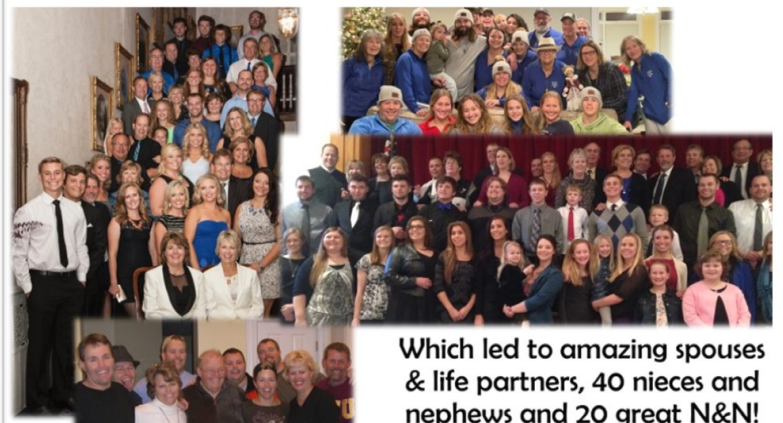
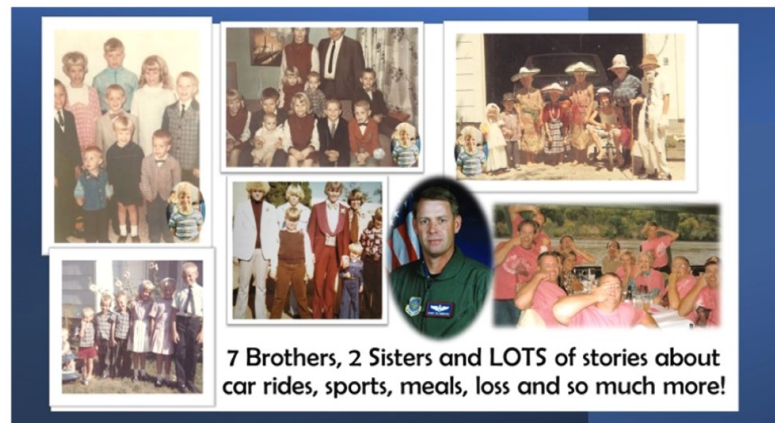
What has Six decades taught Michelle?



It started with them – this Swede and German!

“So, what has 6 decades taught Michelle? Only this...”

(continued on page 2)



So what has 6 decades taught Michelle? Only this...



(continued on page 3)

As I cross over this threshold and into the next decade of my life, I'd like to thank all of you for being in my life. And as Thanksgiving is upon us, my favorite holiday, AgVantage Software would like to wish you this....



In our 47th year of business, I realize you have many choices for software providers. I will do my best, each and every day, to assure your happiness in your choice of AgVantage® Software as your Agri-Business System Solutions.

AgVantage Software Holiday Hours

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

Christmas

Monday, December 25th , 2023 – AgVantage Offices are Closed for the Christmas Holiday

New Years

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

Enjoy the Holiday Season, no matter how you celebrate!





PNW Conference Recap

By Rachel Weinberg, Customer Services Representative - rachelw@agvantage.com

We just finished up with our Regional Conference in Spokane, WA. This was a 2-day event full of training and discussion with our PNW customers who do things a little differently with their commodities and inventories. It was great to meet everyone and talk about efficiency and processes.

We started off day one with introductions to get to know everyone. Next, we moved on to what's new and happening at AgVantage. Dillon showed the group how to navigate PULSE and EDGE as well as some fun tips, like the ability to change the color of the screen and text. Another feature of using EDGE in Google Chrome is the ability to bookmark and save the page to the desktop for ease of access.

Next, we had Dawn Klingfus join us remotely to walk through the Accounts Receivable Customer Portal. Within EDGE AR, there are links over to features that used to be in different menus throughout Legacy and are all now combined in one spot. Dawn then showcased the new Credit Operations Portal. This is a brand new menu where users can track a customer's Assets and Credit history.

After lunch, Sheri Boyken joined us for a demonstration of the new features in Patronage. Once Sheri was done, Michelle Sirosky came in and walked us through the AR Item Portal. Only a couple of the attendees have started using EDGE Invoicing, so Terri Schwarzrock was able to walk us through how that works and some new enhancements.

We finished out day one with presentations from Mark Meyer on Inventory, Cheryl for Accounts Payable, and Dillon again for POCKT and CRM.

Day 2 was full of Grain Operations and discussions. We started with the latest enhancements, moved to tips on balancing the DPR and Long Short, and then showed everyone our new program called the Buy Pad. After lunch, we had open discussions on Grain and went in depth on the POCKT features for Grain. Once we were all talked out of Grain, we had Dennis Boccardi join us to discuss Seed operations.



Thank you to everyone who attended this event. Getting to meet with our customers who are so far away and don't always have a chance to make it to the National User Conference is invaluable. For these customers, they are usually gearing up for their harvest in June so it can be hard for them to get over to MN. I hope everyone had a good time and learned something to help their business grow and succeed.

Thanks,
Rachel Weinberg



Upcoming...

- ⇒ AgVantage Executive Conference March 7-8, 2024
JW Marriott, Savannah, GA
- ⇒ AgVantage National Conference June 19-21, 2024
Radisson Blu, Mall of America, Bloomington, MN



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.

Upcoming E-Trainings:

Wednesday, December 13th 10 am – noon; Payroll End of Year

Thursday, December 14th 2 pm – 4 pm; Electronic Filing of W-2s

Thursday, December 21st 2 pm – 4 pm; Payroll End of Year

Take note of the changes to electronic filing mentioned on page 5. 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 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 12/13

10am—12pm CST

Payroll End of Year (No Charge)

2pm—4pm CST

Patronage Distribution

Thursday 12/14

10am—12pm CST

Grain End of Year & Deferred Payments

2pm—4pm CST

Payroll Electronic Filing of W2's (No Charge)

Wednesday 12/20

10am—12pm CST

1099s Patronage & AP (No Charge)

Thursday 12/21

2pm—4pm CST

Payroll End of Year (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.

Edge Credit

- Credit letters user interface (591650)
- Account flags report (594292)
- Add credit reports to EDGE (597743)
- Add ACH tab to customer profile (606198)
- Assets tab enhancement (606199)
- Add history tab to customer profile (606381)
- Add ACID actions to credit notes in communications and add authority (611222)

Customer Relationship Manager

- Added secure document storage to CRM (483389)

Edge Agronomy

- Require pesticide license expiration date if license is entered (561642)

Edge Accounts Payable

- Add wild card lookup to invoice lookup (605913)
- Add message to rerun vendor to pay if due dates are changed (609070)
- Invoice lookup - cursor default back to lookup box when reset (609420)
- Add sort option to status on bank reconciliation (611268)
- Add +4 zip to miscellaneous check entry screen (611368)
- Vendor payment report with check and invoice - include check amount (611534)
- Display vendor balances - add total to top of screen (612229)

Edge Accounts Receivable

- Add detail sales analysis report (441959)
- Add search customer in EI/EdgeAR by address or phone number (590103)
- Add fields in u4itmmr to item audit tab (605972)
- Auto populate date customer is setup in customer portal (606400)
- Year End Report - option to include detail on main screen (606973)
- Add total to quantity and amount on detail sales analysis report PDF (610713)
- Statements - look at constants file to get current month (614995)

Edge Crop Protection

- Change chemical shipments to be the same as seed shipments (605990)

Edge Energy

- Refill site file - add address and a notes field (573309)
- Call from eEnergy loads all fields when editing (588523)
- Route optimization - add starting and ending point for a driver (549626)
- Route optimization - validate gallons (549628)

Edge Feed

- Floorstocks from feed convert to bags (576446)
- Don't allow customer number to be changed after feed order is saved (613361)
- Add load report (585790)

(continued on page 9)

Edge General Ledger

- Add working trial balance (490579)
- Add detail trial balance report (490583)
- Add account balance inquiry (490589)
- Add drill down to journal entries in general ledger detail & inquiry (578485)
- Add total dollar amount under current period heading (588352)
- Add multi select on individual account detail and inquiry (588936)

Edge Inventory

- Inventory quantity - update to read enter key in loc field without using filter (581755)
- Add PO # to IR Entry screen if applicable (589302)

Edge Patronage

- Current year distribution - pull A/R sales into patronage activity file (493284)
- Current year - pull miscellaneous sales into patronage activity file (493286)
- Current year distribution - remove selected activity (493287)
- Current year distribution - transfer activity amounts from patron to patron (493289)
- Current year distribution - print activity report complete member/Non-member (493290)
- Current year distribution - print activity member/Non-member by dollar amount (493291)
- Customer portal now displays lock error message (606191)
- Member status verbiage consistent in all views (611496)
- Fiscal year and tax year fields need consistency between screens (614058)
- Patronage activity report - display error if no records in file (614128)

Edge Seed

- Seed year end summary report displays dispatches that net 0 (529775)

Edge Invoicing

- Ability to change term code for customer in split window (595473)

Grain

- Change EOY menu to run new purchase archive program - without locks (614338)

Interfaces

- Add new interfaces type in customer cross reference (596730)
- Add settlement sequence to scale ticket endpoint (605108)
- Create data endpoint for customer salesperson file (610698)
- Hide authkey and tie to terminal type (Clover Connect) (614191)
- NAPA view file option not using '/data/' for iasp (615459)

PC Energy

- Add PO to the tank to pass thru for customer with a permanent PO # (573664)

PC Grain Scale

- Correct duplicate records being added when CHS updates a load (592946)

PC Invoicing

- Include retail pricing in inventory request (605602)

Payroll

- WA Cares Act - file to report to state (516387)

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

