

AGCO Plus+

Product Manual



ibcos

A Constellation software company

In partnership with



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1. PRODUCT OVERVIEW

AGCO Plus+ is a joint initiative between AGCO Finance and AGCO Aftersales (Parts and Service).

AGCO Plus+ is a flexible payment solution for all customers' aftersales purchases. In addition customers can earn SMART Rewards Cash when purchasing Genuine AGCO Parts. Once a customer is accepted for AGCO Plus+, they have a line of credit for all their aftersales purchases with AGCO Finance rather than the dealer. When a customer makes a purchase, AGCO Finance will reimburse the dealer within 2 days, and the customer will receive a monthly statement detailing their transactions and payments from AGCO.



2. SET UP

AGCO Finance Account

The Ibcos Professional Services team will carry out the set up of your system for AGCO Plus+.

You will need to provide a customer account number to be used for AGCO Finance. This is held on the Manufacturer Prefix File together with your AGCO Plus Dealer ID. See below for an example.

Manufacturer Prefix Mapping dialog box showing the following fields and values:

- Manufacturer: AGCO
- AGCO Plus Acc No: 11212
- Dealer Id: EME_UKXXTRMA_C
- Invoice Type (Account): No
- Autogenerate customers: No
- Class Codes: 9
- Standard Order Type: []
- Service Order Type: []
- Operator Initials: []
- Main Prefix: AG
- Additional Prefixes: FD VA [] [] [] [] [] [] [] [] [] []
- Invoice Type (Cash): []
- Guest Account: []
- VOR Order Type: []

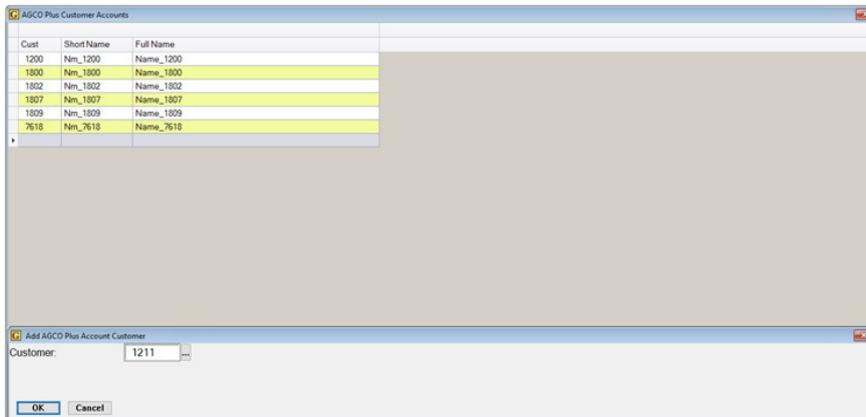
Customer Set Up

Before you can set the customer up in Gold, they need to have completed the AGCO Plus+ application form, been accepted and been set up in SMART Rewards (if they have applied).

Once these steps are completed, you will be informed by AGCO Finance. You can then add them to **AGCO Plus+ Customer Accounts** in Gold.

Follow the steps below to add an AGCO Plus+ Customer:
Communications > AGCO Links > AGCO Plus+ Customer Maintenance

1. Press **F2** to insert a new customer then enter **their customer number** or use the **standard lookup**.



Note: Customer accounts added to the AGCO Plus+ Customer Maintenance cannot be set to Cash Sale. The following error message will appear if this happens.

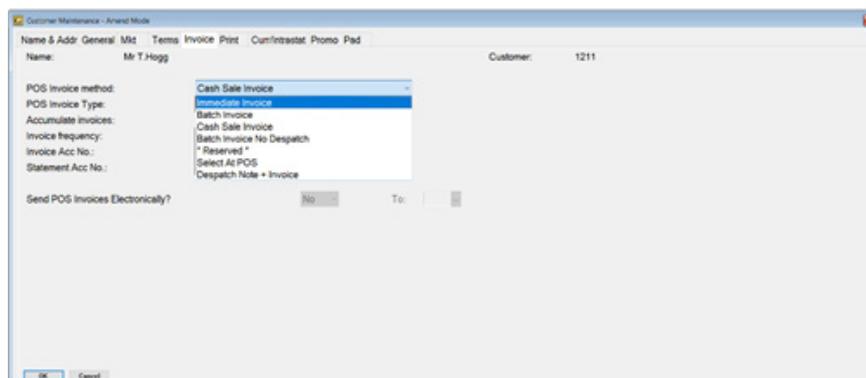
AGCO Plus Maintenance Company 998 IBC Copy Co. ... X



Cash Sale Invoice method accounts are not allowed for AGCO Plus

OK

Follow the steps below to correct this error:
Customer Maintenance > Invoice > POS Invoice Method > Immediate Invoice

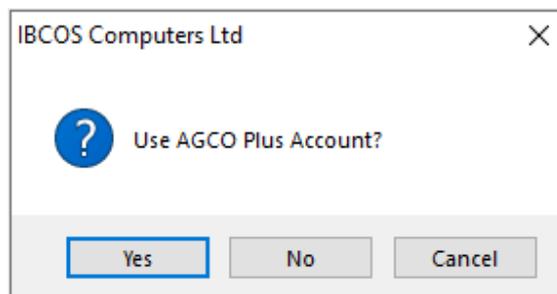


3. POINT-OF-SALE ADVICE

Point-of-Sale Advices will be created using the normal procedures. The changes in steps are when you complete the advice.



1. When selecting to **Finish (F6)** the advice, if the customer account is set for AGCO Plus+, there will be an on screen message: **Use AGCO Plus+ Account?**



2. This message will only appear **after Gold credit checks** are made and will not be displayed if the customer is over credit limit or on stop (unless the stop password has been entered).
3. Select **Yes** if the customer would like to use their **AGCO Plus+ Account**.
 - a. In the background, a **check** will be made to ensure the customer has **available credit on their AGCO Plus+ account**. If successful, then the invoice is raised and posted to the customer account. This will automatically be journaled to the main AGCO Plus+ account and the **invoice** will be **sent to AGCO Finance electronically**, and SMART Rewards (if relevant).
 - b. For the customers' reference, on the bottom of the invoice, it will say: This invoice will be settled via your AGCO Plus+ account.
4. If you select **No**, or the **AGCO Plus+ credit check fails**, then the invoice can still be raised and posted to the customer account as normal without using their AGCO Plus+ Account. The customer will need to pay the invoice under their normal payment terms with the dealer.

4. WORKSHOP

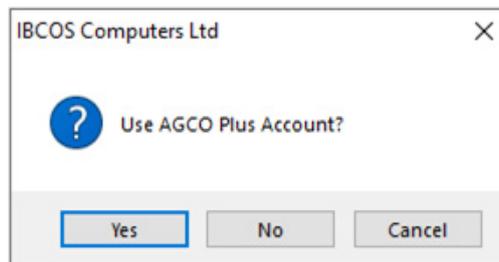
4.1. Invoicing a Job

The steps remain the same for invoicing a job in workshop entry until the last step. Both AGCO and non-AGCO parts can be included on invoices and the total invoice is sent to AGCO Finance.



Immediate Invoice (recommended)

1. Complete the job using **Immediate Invoice (F4)**.
2. If a customer has an AGCO Plus+ Account set up, the following message will appear:
Use AGCO Plus+ Account?



3. This message will only appear **after Gold credit checks** are made and will not be displayed if the customer is over credit limit or on stop (unless the stop password has been entered).
4. Select **Yes** if the customer would like to use their **AGCO Plus+ Account**.
 - a. In the background, a **check** will be made to ensure the customer has **available credit on their AGCO Plus+ account**. If successful, then the invoice is raised and posted to the customer account. This will automatically be journaled to the main AGCO Plus+ account and the **invoice** will be **sent to AGCO Finance electronically**, and SMART Rewards (if relevant).
 - b. For the customers' reference, on the bottom of the invoice, it will say: This invoice will be settled via your AGCO Plus+ account.
5. If you select **No**, or the **AGCO Plus+ credit check fails**, then the invoice is raised and posted to the customers' account rather than the AGCO Plus+ account. The customer will need to pay the invoice under their normal payment terms with the dealer.

Batch Invoice

1. Complete the job using **Batch Invoice (F3)**.
2. If the customer is set up for an AGCO Plus+ Account, the following message will appear:
Use AGCO Plus+ Account?
3. Selecting **Yes** will perform **credit checks**, raise the invoice immediately and send the **invoice to AGCO Finance**.
4. Selecting **No** will place the the invoice in the batch invoice queue. When the batch is processed the invoice will be raised against the customer account directly and not sent to AGCO Finance for settlement. The customer will need to pay the invoice under their normal payment terms with the dealer.



Note: Any labour lines with zero hours and either a positive or negative value will be transferred to AGCO Plus+ as 1 hour. It is recommended that any labour adjustments are created in Gold with a positive or negative number of hours rather than zero hours so that the Labour Efficiency report can run correctly and the invoice will exactly match the data sent to AGCO Plus+.

4.2. Credit Checks Using Workshop Budget

If Workshop Budgets are set up for use in Gold, a credit check can be carried out to determine if there is sufficient available credit on the customers' AGCO Plus+ account for these values prior to a job being invoiced.

1. **Enter the Labour Budget and Parts Budget values** to be checked (inclusive of any VAT) and select **AGCOPLS** to check the account.

Budget Hours:	<input type="text" value="0.00"/>	Current Labour Hours	10.00
Labour Budget Value:	<input type="text" value="3000.00"/>	Current Labour Value:	572.00
Labour Budget Warning %:	<input type="text" value="100.00"/>	Current Labour Budget %:	19.07
Parts Budget Value:	<input type="text" value="1500.00"/>	Current Parts Value:	14.34
Parts Budget Warning %:	<input type="text" value="100.00"/>	Current Parts Budget %:	0.96

OK Cancel AGCOPLS

2. The result of this check; **pass, fail or error**, is recorded in the audit against the job and can be viewed on the **Audit tab**.



Note: This is only a check and does not a guarantee that the final invoice will be approved.



5. CREDIT NOTES

Credit notes generated as an auto credit via Invoice Recall will have their information sent to AGCO Finance and are identified by the associated original invoice number. The following message will appear on the invoice: **This credit note will be settled via your AGCO Plus+ account.**

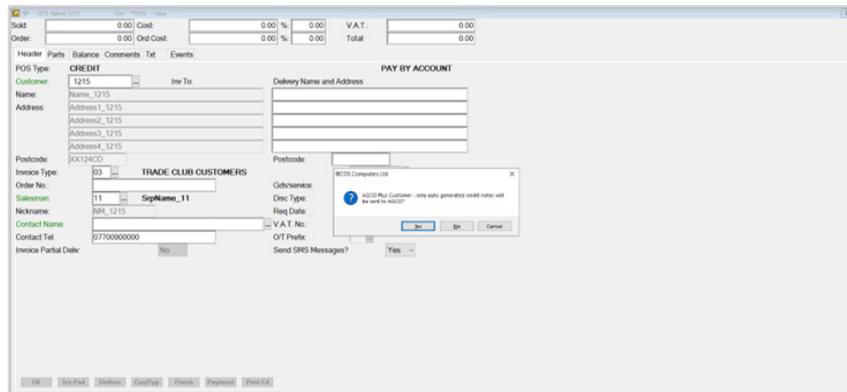
These will be posted to the customer account then journalled to the AGCO Plus+ Account as per the invoice (reversing the original invoice).



Manually generated credit notes are not eligible for AGCO Plus+. When attempting to raise a manual credit note in POS or WSJ for an AGCO Plus+ customer a warning message will be displayed.



Auto-generated credit notes are eligible for AGCO Plus+ customers. Auto generated credit notes will be sent directly to AGCO Finance.



6. VIEWING A CUSTOMER ACCOUNT

Any invoice raised will be posted against the customer account so that sales history for the customer is maintained.

AGCO Plus+ invoices will then be automatically journalled from the customer account to the **AGCO Finance customer account** used for AGCO Plus+.

This moves the debt from the customer to AGCO Finance where it will be settled by AGCO Finance.

Here is an example of a Customer Account:

Date	Ref no	Type	O/S Amount	Orig Amount	Disc Date	Settlement	Age	Dispute	Inv Desc	Pay Ref	Orig A/c	Del A/c
19/12/2022	149010	Inv	0.00	16.22	18/01/2023	16.22	Cur		PARTS RETAIL SALES			
19/12/2022	149010	Jnl	0.00	-16.22	18/01/2023	-16.22	Cur		11212 AGCO PLUS			
19/12/2022	149011	Inv	123.61	123.61	18/01/2023	123.61	Cur		PARTS RETAIL SALES			
19/12/2022	149012	Inv	118.69	118.69	18/01/2023	118.69	Cur		PARTS RETAIL SALES			
20/12/2022	149013	Inv	0.00	59.74	19/01/2023	59.74	Cur		PARTS RETAIL SALES			
20/12/2022	149013	Jnl	0.00	-59.74	19/01/2023	-59.74	Cur		11212 AGCO PLUS			
20/12/2022	149014	Cint	0.00	0.00	06/02/2023	0.00	Cur		PARTS RETAIL SALES			
21/12/2022	149015	Inv	0.00	64.99	20/01/2023	64.99	Cur		PARTS RETAIL SALES			
21/12/2022	149015	Jnl	0.00	-64.99	20/01/2023	-64.99	Cur		11212 AGCO PLUS			
21/12/2022	149016	Cint	0.00	0.00	06/02/2023	0.00	Cur		PARTS RETAIL SALES			
07/02/2023	149017	Inv	1.20	1.20	09/03/2023	1.20	Cur		PARTS RETAIL SALES			
07/02/2023	149018	Inv	0.00	31.94	09/03/2023	31.94	Cur		PARTS RETAIL SALES			
07/02/2023	149018	Jnl	0.00	-31.94	09/03/2023	-31.94	Cur		11212 AGCO PLUS			

Total outstanding 243.50 #paid now 243.50

Here is an example of an AGCO Plus+ Account:

The Invoice Description will show the originating customer account number.

Date	Ref no	Type	O/S Amount	Orig Amount	Disc Date	Settlement	Age	Dispute	Inv Desc	Pay Ref	Orig A/c	Del A/c
09/12/2022	149008	Jnl	16.22	16.22	09/12/2022	16.22	Cur		1807 Name_1807			
09/12/2022	149009	Jnl	104.75	104.75	09/12/2022	104.75	Cur		1807 Name_1807			
19/12/2022	149010	Jnl	16.22	16.22	18/01/2023	16.22	Cur		1809 Name_1809			
20/12/2022	149013	Jnl	59.74	59.74	19/01/2023	59.74	Cur		1809 Name_1809			
21/12/2022	149015	Jnl	64.99	64.99	20/01/2023	64.99	Cur		1809 Name_1809			
07/02/2023	149018	Jnl	31.94	31.94	09/03/2023	31.94	Cur		1809 Name_1809			

Total outstanding 293.86 #paid now 293.86

7. USEFUL INFORMATION



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