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SUMMER 2016



## OAKLAND Scale Interface Update

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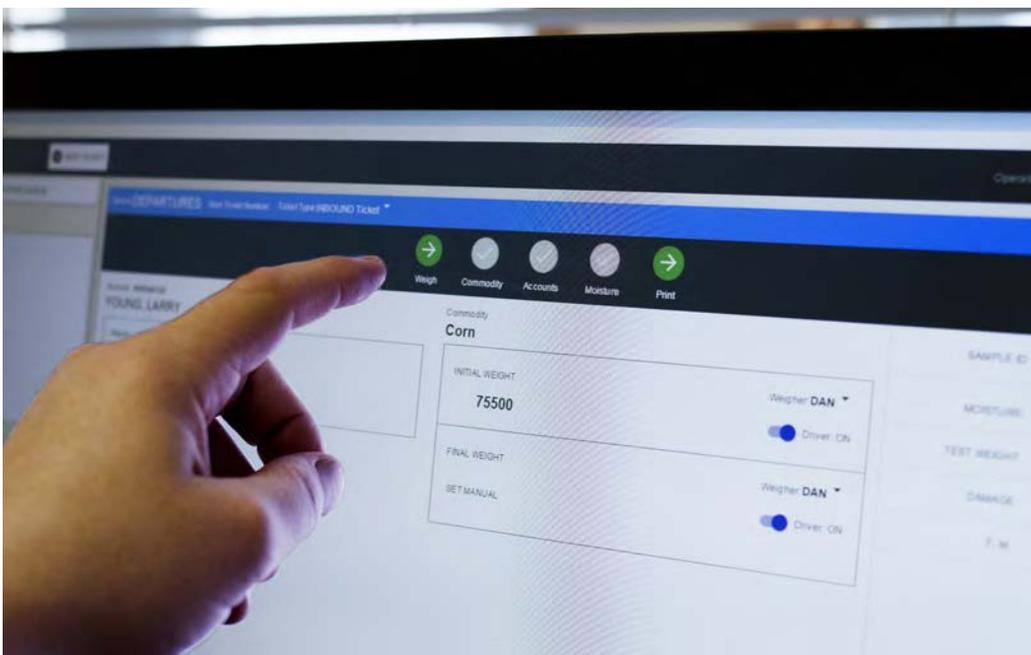
Last year, Oakland announced we were beginning development on our own scale interface software offering, and I'm happy to report that the initial feedback from the companies that are early adopters of OAKLAND Scale has been very positive. As we stated in the original announcement, we designed the new interface for "ease of use, speed, and flexibility in ticket workflow, while still conforming to Oakland's solid foundation of business rules, as well as weights and measures standards."

Although our original designs for the application are still visible in the final product, it is truly all of the feedback and new ideas from the people using the program every day that make this new interface what it is. To illustrate this, I'll take each section of the quote from our original announcement above and recount some of the ways that feedback from scale operators at our client companies have refined our original designs.

**Ease of use:** One of the first design dilemmas we encountered was how to start a ticket. I know that sounds silly, but there can be a lot of "unknowns" when a vehicle pulls onto the scale, and we've been designing the application to be straightforward regardless of whether a new ticket is started by 1) a person at the scale pressing a button or 2) an automated device scanning a RFID tag displayed on the vehicle. We started off presenting the user with a long list of possible transaction types like "open", "contract", "grain bank" and so on. As harvest was starting up last year, one of our first users recommended we keep things simple, as most of the information above isn't fully known until later in the ticketing process. We ended up with "inbound" and "outbound" – and these are really only there to help our application know if and when the load will be inspected. Everything else becomes apparent as the ticket moves towards completion.

**Speed:** Looking back on the initial beta version of our scale interface, we struggled with how we should look up accounts and haulers. We modeled everything on the speedy account lookups within the OAKLAND Accounting platform, and this works great when using a keyboard.

*(continued on page 2)*



## Events

### Holiday Closings

- **Independence Day**  
July 4th
- **Labor Day**  
September 5th

### Summer Conference Dates

- **Wednesday, July 20th**
- **Thursday, August 4th**  
More details on page 3.

## New Clients & Mergers



Oakland welcomes Eastland Feed & Grain, based out of Shannon, Illinois. They have locations in Savanna, Illinois; and Platteville, Wisconsin. They serve producers in grain storage and merchandising, as well as feed manufacturing in the tri-state region of Illinois, Iowa, and Wisconsin. Eastland Feed & Grain has been on Oakland since March 1<sup>st</sup>, 2016.

President: Roger Coulthard

Website: [www.efgi.net](http://www.efgi.net)



On September 1, 2015; United Farmers Cooperative of George, Iowa; the Coop Elevator Association of Ocheyedan, Iowa; and the Farmers Elevator Coop of Rock Valley, Iowa merged to become Cooperative Farmers Elevator (CFE).

The new combined company of CFE has a total 19 locations serving over 3000 members in Iowa, Minnesota, and South Dakota. Their services include Grain, Agronomy, Feed, Fuel, and Lumber. Oakland was honored to assist CFE during their merger process, and we look forward to serving CFE for years to come. Congratulations on a successful merger.

CEO: Rob Jacobs

CFO: Mark Finck

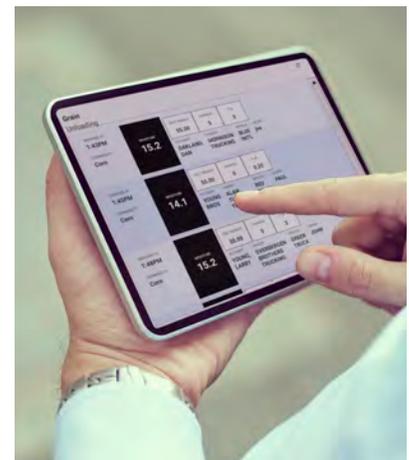
Website: [www.coopfe.com](http://www.coopfe.com)

### "OAKLAND Scale Interface Update"

(continued from page 1)

When searching using a touchscreen or handheld device, however, having to continually punch in several letters to look up an account on every single ticket was tedious and time-consuming. Another idea from the folks at our first beta location was to create a list of "recently used" accounts. We divided the search screen in two and placed a scrollable list of the last 50 accounts on the right-hand side of the lookup. Now searches only need to happen on the first load, and a single tap or click is all it takes to select the account when they come back with additional loads within the next day or so.

**Flexibility in ticket workflow:** One of the more recent installations we completed had a ticket workflow that was different than what we had seen at our beta locations. It is a single scale location, and grain moisture analysis can happen using either the tester in the office or a second tester at a remote pit. This introduced a level of complexity to our ticket validation process, in that moisture analysis results could come from different places and at very different times between the first and second weights. In designing a solution, we worked onsite to understand exactly how loads were routed, and redesigned our moisture tester interface to allow for these different cases: analysis results can now be attached right at the scale, or if configured, selected from moisture tester result history identified by account and load information entered into the tester itself at the time of analysis.



*Notify pit personnel of incoming loads, vehicle information, and commodity grades without the need of 2-way radios or phone calls. Compatible with multiple platforms, tablet, smartphone or traditional PC/laptop devices.*



## Larry Young Retirement

Many of you are aware that Larry Young retired from Oakland Corporation in January of this year. He has settled easily into retirement and has been busy traveling and spending time with his wife and family.

Larry was part of the Grain and Agronomy Installation and Support at Oakland. In his nearly 20 years of employment, he had seen several versions of the Oakland System. We have many joyous memories with Larry during his time at Oakland. He has certainly been missed, but we are grateful for his years of dedication and service to Oakland Corporation.



## Booking Options

**Dolores Morgart**  
dmorgart@oaklandcorp.com

Your Bookings for the season have been set up and are ready to go. Products have been delivered to or picked up by your farmers, but what they wanted last December and what they got in the spring are different. Due to weather conditions, new products coming out, or compatibility with other products, a change has been made and something different was used. This leaves money in the prepaid booking for the unused product. However, the farmer wants to use that money for what was taken.

Within the Oakland Point of Sale ticket, you can deliver the new product against the unused product booking. Starting with a regular charge distribution code, input the product that needs billed, the quantity and the price for that product and press enter, just like normal. Using your <left arrow> key, go back to the unit price field and press the <F1> key to switch the booking (this information is displayed at the top of the screen). Select either the product or categorical option, to choose where you want to take the money from, and enter. This will display all of the valid bookings for that customer. Select the one you want to use by highlighting it in the list, and enter. Another box will pop up asking if you want to switch the selected product or just deliver against it. At this point, input a "D" to deliver against it and enter. That will put you back

to the original line of the product. When you press enter again, you will see that a prepaid distribution code shows up on the line, and a PRE indicating that it is prepaid. To view the bookings again, you can press the <F3> key at the description field, select the product/categorical option, highlight on the product, and press the <F3> again to view the deliveries. You will see the product that was billed has been delivered against the unused product.

There are numerous options for Bookings within the Oakland System. There are Unpaid Bookings, which lock in a price without any money attached; Prepaid Categorical Bookings that are used when a customer gives you a lump sum of money for certain types of products; and Prepaid Product Bookings that can be either fully paid or partially paid. We also have Prepaid Sales Tax Bookings that attach to the original products (for example propane), for use by that original booking only. Also available are Ceiling/Maximum Price Bookings. The price is guaranteed not to go over a certain value, but if the market price is lesser, it will charge at the lesser price and still use that booking money. There are options for Shared Product Groups and Shared Customer as well. We can also help you switch bookings from unpaid to prepaid, if your customer comes in with the check.

At the end of the season, we can help you adjust any amount of excess prepaid money to pay on the customer's bill. Please contact any of our accounting support staff if you are in need of assistance with these options.

## Summer Conferences: July 20<sup>th</sup> and August 4<sup>th</sup>

Soon it will be Summer Conference time again. This year we will focus on our new OAKLAND Scale program and demonstrate the latest features that will be available this fall. We will also review some key features in the current version of OAKLAND as well as features that will be available with the Fall Update. We've been told many times by attendees that they come away from these conferences with "I didn't know the system could do that" attitude.

Seating is limited for these conference dates, so register early. Contact Cande to sign up for your preferred date. 800-733-0676 x109 or by email [ccoulter@oaklandcorp.com](mailto:ccoulter@oaklandcorp.com)



# New Feature Spotlight: Enhanced Sales Rep Reporting

With the new system update released in March (version 4.62), Oakland now provides an alternative reporting method for sales-rep-related dollar and unit totals. This new feature changes the way that the system structures its relationships between customers, sales reps, and the product categories for which each sales rep is responsible. The process of establishing these relationships can now be summarized as follows:

1. A "category group" is created that contains all of the product categories associated with a sales rep (or group of sales reps selling similar products). For example, a category group called "Fertilizer" could be set up to include all fertilizer product categories.
2. Sales reps are then assigned to one or more category groups.
3. Customers are then assigned to one or more sales reps, but only one sales rep per category.

Because the sales reps themselves fall under different category groups, reports can easily aggregate totals for each sales rep that do not

overlap with other sales reps or include transactions that do not fall within the sales reps' respective categories. While this type of reporting was possible in earlier versions of OAKLAND, reports needed to be run individually for each range of products. Now these types of reports can be run for all sales reps at once.

Sales reps can still be explicitly attached to point of sale transactions manually on a case-by-case basis, and reports within the OAKLAND System will now ask you to choose what type of reporting strategy you would like to use before each report run: "Actual Sales Rep" or "Category Group Sales Rep". The actual sales rep is the rep that was attached to a particular invoice. The category group sales rep is the logical sales rep that is determined based on the new Category > Sales Rep > Customer hierarchy described above.

Please contact OAKLAND Support if you are interested in learning more about this feature or would like to begin the setup process for one or more of our departments.

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