



# Importing recommendations from agronomists

Download notes to accompany help video

Please note before proceeding:

These notes have been created to accompany the video guide available on the Farmplan website. The videos are quick help resources, and as such their contents do not cover every available situation, option, or solution: depending on your farm and business setup you may need to adapt or follow a different process.

For further information please contact the Gatekeeper support team, who will be happy to advise you.



*These notes show the process to import a recommendation which has been sent from another Gatekeeper. If you are new to Gatekeeper or to publishing, you will first need to exchange publishing keys with your contact; please refer to the help resources for assistance with this if required.*

1. If you have not synchronised your Gatekeeper recently, you will need to do this before proceeding.
2. To import a recommendation, click on the envelope icon to open the publishing centre. Any publications which have been sent to you will be visible in your inbox. To import a publication, select it and then click 'Import published data'.
3. *Customers with multiple businesses only:* ensure you are in the correct business before proceeding.
4. If you wish to preview the plan during the import process, ensure there is a tick in the box 'Preview job before saving job and product data'.
5. Click 'Import data'.
6. If your business name is different to the business name in your agronomist's Gatekeeper, you will be presented with two warnings. Accept these warnings (customers with multiple businesses – be very sure you are in the correct business!).
7. The screen that appears shows the fields within the publication. If any fields have not automatically matched (shown by the green tick), match them into the correct fields by double clicking in the 'Field' column. If your fields are split, you will also need to match the region before the green tick will appear.
8. Once all fields are correctly matched, click on 'Import'.
9. If you chose to preview the recommendation, you will now be able to see the plan. Click 'OK' to close.

Once imported, the plan will sit within your planning module, under the 'draft' node. You can issue the plan as usual when you wish to use it.