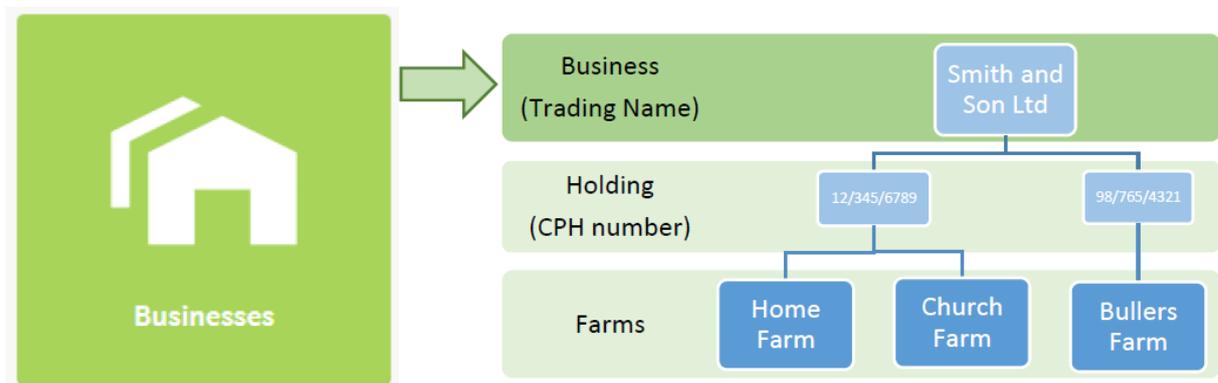


How to setup Businesses

Setup > Businesses is where your business details can be added and edited.



Businesses control their own stock centres and product pricing. Each business can have multiple holdings or farms connected to it. You will also need to add holdings and farms as required – the structure is shown above.

Your business name will have been entered during the on-boarding process. You will need to add your business address and holding information.

To add a business

From the Setup module:

1. Select the Businesses icon
2. Select the + New Business button
3. Enter the required information and press the tick
4. Select the required business from the list and add the Address details

Please note, the ability to add additional businesses is dependent upon your Gatekeeper version. If you need to add additional businesses but do not have the ability please call Farmplan sales on 01594 545000 to upgrade.

To edit business details

From the Setup module:

1. Select the Businesses icon
2. Select the required business from the list
3. A drawer will appear showing the business details
4. Click on the form to edit the details

Enter or edit the information found in the following sections:

| | |
|-----------------|---|
| Details | Business name - The first business name is assigned during the on-boarding process but can be amended if necessary in this form |
| Address | Enter the business details as required |
| Holdings | See below |

To add a holding within a business

Holdings allow you to group farms and fields under the appropriate CPH number. You may need to add additional holdings if your business has multiple CPH numbers.

To add the holding details, from the Setup module:

1. Open the business name you want to add a holding to
2. Click into the Holdings pane on the right hand side
3. Click + Add Holding
4. Enter the holding name and CPH/Herd number, and select a land parcel identification option (for English and Welsh customers, this will be 'Map Sheep / NG number', for Scottish customers this will be 'Scottish LPID' and Irish customers this will be 'LPIS No').