

GROWING AMBITION

QuickLink Credit[®] Dealer Online User Manual



Rabo
AgriFinance

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Contact Information

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www.RaboAg.com

Registration and Log In

UAT Environment (IE 10.0) RaboAg.com Contact Us

Rabo AgriFinance

Welcome to Dealer Online

Dealer Login

Login Name

Password

[Forgot Your Password?](#)

Login

If you are a new user, please [click here](#) to register.
[Click here](#) for customer security information.


Growing Ambition

To access dealer online go to www.RaboAg.com.

- Click on Vendor Finance
- Select Dealer Login
- The Account Administrator will need to [click here](#) to register and complete the registration process. During the registration process set up a Login Name and provide an email address. Upon completion of the registration process, a password will be emailed to the address provided authorizing access to the website. An email confirmation will be sent when the registration is completed.
- Upon return to the website, enter in the Login Name and password that was set up and emailed during the registration process, then select **Login**
- Accept an End User License Agreement, change the password, answer 5 security questions and select a security image.
- After the initial registration and login process, upon subsequent Login attempts you will be randomly asked one of the five security questions answered during registration.
- *If you are not the Administrator for your account, please work with your Administrator to set up a Login Name to access the website.*


Registration and Log In

UAT Environment (IE 10.0 Trident/6.0) RaboAg.com [Contact Us](#)

 Welcome to Dealer Online

Setup Enhanced Security
1) For enhanced security to Dealer Online, please select five challenge questions below, enter answers to the questions, and select a security image.
2) When finished, please enter password and select "Save Enhanced Security".
3) Red asterisks indicate information is required.

Security Question 1:
Security Answer 1:
Security Question 2:
Security Answer 2:
Security Question 3:
Security Answer 3:
Security Question 4:
Security Answer 4:
Security Question 5:
Security Answer 5:

Login:
Security Image: 
[Click to select a different image](#)
Enter Current Password:

[Back to Login Page](#)

After the End User License Agreement is accepted, you will be prompted to change the password, answer 5 security questions and select a security image.

- Select the drop down arrow to the right of the Security Question to view a list of the questions.
- Select one of the question options
 - Answer 5 *different* security questions – you will not be able to answer the same question more than once.
- Answer each question appropriately, however the system does not check to ensure that the answer is a valid response.

The website will display a security image upon Login. The same security image will appear with each login, so remember the security image that is selected. **If the image is different upon login than the one selected contact Rabo AgriFinance.**

- To scroll through the security image options, click on the image on the screen.
 - The image will scroll to the next available option to choose from.
- Once an image is selected, leave that image on the screen and move to Enter Current Password. This will save the image that was selected.

To change the password, security questions and security image, go to My Profile (see page 23) or contact the Administrator.

Submit a Purchase

UAT Environment Logout RaboAg.Com Contact Us

Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers Reports User Administration My Profile

View Advanced Search Add Customer Search Clear

Narrow Results

Account #: Last / Business Name: State: City:

Download to Excel

Page Size: 25

Account #	Last Name	First Name	Street Address	City	State	Status	Credit Limit	Available Credit	Sponsor	
613815	Brown	Mark	59 Old Yeller Road	Oakley	NE	ACTIVE	\$75,000.00	\$75,000.00	Dealer	Transact
707789	Rhodes	Alexander	22222 County Road 49	Seymour	IL	ACTIVE	\$125,000.00	\$110,248.08	Dealer	Transact
707756	Smith	Samuel	100 Planter Road	Jamestown	IN	ACTIVE	\$62,000.00	\$62,000.00	Dealer	Transact

Submitting Transactions



The customers that appear in the listing are assigned to your location based on the dealer information listed on the customer's application or have been added to the list (*see page 5*). To quickly search for a customer, enter a piece of their information in the **Narrow Results** fields, or select **View Advanced Search** for more search field options. If only know a portion of the spelling of any of the items in the Search is known, the % sign can be inserted as a wildcard in the field you are searching.

- To view the transaction history for the customer selected, click the **Account #** to the left of their name, *see page 4*
- Customers with a status of **Active** are available to submit invoices for payment.
- To submit an invoice for payment:
 - Select **Transact** and go to page 6
- To process a credit to a customer's credit line:
 - Select **Transact** and go to page 10

Submit a Purchase

UAT Environment

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Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Customer Transaction History Report

Click the column heading to sort the report differently.

Customer: 707789
Alexander Rhodes

Total Credit: \$125,000.00

Address: 22222 County Road 49
Seymour, IL 55555

Available Credit: \$109,247.44
Most Recent Payment Date:

Printer Friendly Version

Download to Excel

Remove From My Customer

Page Size: 25

Date Entered	Confirmation Number	Supplier Invoice Number	Type	Program	Product	Transaction Comments	Invoice Amount	Credit Service Fee	Paid Date	Check Number
08/28/2013	730466	123794	Credit	120 Days NP/NI			(\$500.00)	\$0.00		
08/28/2013	730453	124794	Charge	120 Days NP/NI			\$1,500.64	\$0.00		
08/28/2013	730455	124794	Charge	120 Days NP/NI			\$1,500.64	\$0.00		
08/28/2013	730459	124794	Charge	120 Days NP/NI			\$1,500.64	\$0.00		

Transaction History

Click on a customer's **Account #** to the left of their name on the landing page, this will display the customer's transaction history.

Click on any of the headings on the report to change the sort order on the screen and then select either **Printer Friendly Version** to print the report or select **Download to Excel** to put the data in an Excel file.

If you no longer want this customer's account or information on the customer listing on the landing page. Select **Remove From My Customer**. This will delete the customer from the list.

Submit a Purchase

Adding a Customer

Customers may be participating in financing programs that are offered through Sponsoring Partners and they would not initially display on the customer listing.

To add a customer that is participating in a sponsored program:

- Your location must be authorized by the sponsor to participate in the financing offer
- Select **Add Customer**
- Enter at **least two pieces** of the customer information in the fields on the screen
- If the customer is located you will be able to transact on the customer's account. If you are not able to locate the customer, please call Rabo AgriFinance at 888-395-8505.

After the customer is added, their account will display in the "My Customers" list upon subsequent return to the website.

Submit a Purchase

The screenshot shows the 'Submit a Transaction' page in the Rabo AgriFinance Dealer Online system. The page has a blue header with the logo and navigation links. A message center at the top states that RAF Offices will be closed on July 4th. Below the navigation bar, the 'Submit a Transaction' section is active. It displays customer information for Alexander Rhodes (Account # 707789-11000) with a total credit of \$125,000.00 and available credit of \$110,248.08. A table with columns for Type, Program/Product, Invoice #, Total Amount, and Dealer Comments is shown. The 'Type' dropdown is set to 'Purchase', and the 'Program/Product' dropdown is set to '-- Select A Program --'. The 'Invoice #' and 'Total Amount' fields are empty. There are 'Add' and 'Clear' buttons. A 'Total:' label is present. At the bottom, there are 'Cancel Transaction' and 'Continue to Transaction' buttons. A note on the right states: '*To submit another invoice or calculate the total amount, please click on the add button.'

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Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers Reports User Administration My Profile

Submit a Transaction

* Indicates a required field.
* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes Total Credit: \$125,000.00
Account #: 707789-11000 Available Credit: \$110,248.08

Type	Program/Product	Invoice #	Total Amount	Dealer Comments
Purchase	-- Select A Program --		\$	

Total:

*To submit another invoice or calculate the total amount, please click on the add button.

After selecting **Transact** or adding the customer, you can begin processing invoices for payment.

- Select the program from the drop down list that is available to you. **Be careful to choose the correct program for each invoice that is submitted.**
- If there are product purchase requirements associated with the program, *see page 7*
 - Note: Some of the programs may not require product entry.
- Enter in the invoice number and dollar amount
- Enter in comments in the **Dealer Comments** field (optional). Comments entered are for user reference only and will not appear on customer statements.
- Select **Add** for multiple invoices or product purchases.
- Repeat steps above.
- When finished with invoices select **Continue to Transaction**.

If the program that you are wanting does not appear please contact our office to establish additional program terms.

Submit a Purchase

The screenshot shows the 'Submit a Transaction' page in the Rabo AgriFinance Dealer Online system. The header includes 'UAT Environment', 'Logout', 'RaboAg.Com', and 'Contact Us'. A banner image of a field is at the top. Below the banner is a 'Message Center' with a notice about Independence Day. Navigation tabs include 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The main section is titled 'Submit a Transaction' and contains customer information, credit limits, and a table for adding transaction items. The table has columns for Type, Program/Product, Invoice #, Total Amount, and Dealer Comments. A 'Purchase' item is added with the 'Sponsored Dealer Program'. The 'Total' is calculated as \$109,247.44. Buttons for 'Add', 'Clear', 'Cancel Transaction', and 'Continue to Transaction' are present.

UAT Environment Logout RaboAg.Com Contact Us

Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of **Independence Day**.

My Customers Reports User Administration My Profile

Submit a Transaction

* Indicates a required field.
* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes Total Credit: \$125,000.00
Account #: 707789-11000 Available Credit: \$109,247.44

Type	Program/Product	Invoice #	Total Amount	Dealer Comments
Purchase	Sponsored Dealer Program			
	Product Dropdown Filter:			
	Qualifying Product			

Total:

**To submit another invoice or calculate the total amount, please click on the add button.*

Cancel Transaction Continue to Transaction

Entering Products



If there are product purchase requirements associated with the program, select the product from the drop down list. For multiple products on the same invoice, enter in each product in a separate line item.

- Select the program that is appropriate for the invoice that is being submitted
- To search for the product, in the **Product Dropdown Filter**, type in a portion of the product name.
 - The filter will take you to the products in the list with that spelling
- Otherwise select the down arrow on the product listing and scroll through the product list to find the product that is being invoiced.
- Click on the product in the list that is being invoiced.

Submit a Purchase

UAT Environment

LogoutRaboAg.ComContact Us



Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Confirm Transaction

Please review and confirm the information on your invoice before proceeding with transaction

* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes

Total Credit: \$125,000.00

Account #: 707789-11000

Available Credit: \$110,248.08

TRANSACTION DETAIL					
Type	Program	Product	Invoice #	Total Amount	Dealer Comments
Purchase	120 Days NP/NI		124794	\$1,500.64	

Grand Total:

\$1,500.64

Cancel Transaction

Make Changes

Submit Transaction

Verify that the program, products, invoices, and dollar amounts are correct.



- To delete all of the information that has been entered to this point for the transaction, select *Cancel Transaction*.
- To edit or add additional transactions, select **Make Changes**.
- To complete transaction, select **Submit Transaction**.

Note: Once you select **Submit Transaction**, you will not be able to make changes.

Submit a Purchase

UAT Environment

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Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Transaction Completed

Your transaction was successfully completed. Please make note of your confirmation numbers below.

Customer: Alexander Rhodes

Account #: 707789-11000

Total Credit: \$125,000.00

Available Credit: \$108,747.44

Invoice #	Confirmation #	Total Amount	Type	Program	Product
124794	730459	\$1,500.64	Purchase	120 Days NP/NI	
Grand Total:		\$1,500.64			

Print Confirmation

Submit New Invoice

Back to Dealer Options

Receiving Confirmation Numbers

Submitting an invoice will return a confirmation number for each transaction.

Select **Print Confirmation** to print out the confirmation information for your records or to provide to the customer.

Submit a Credit

The screenshot shows the 'Submit a Transaction' page in the Rabo AgriFinance Dealer Online system. At the top, there's a navigation bar with 'UAT Environment', 'Logout', 'RaboAg.Com', and 'Contact Us'. Below this is a banner with the Rabo AgriFinance logo and a 'Welcome to Dealer Online - Dealer, Demo .' message. A 'Message Center' box states: 'RAF Offices will be closed on July 4th in observance of Independence Day.' Below the message center are four tabs: 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The main content area is titled 'Submit a Transaction' and includes a legend: '* Indicates a required field.' and '* Dealer comments do not appear on customer statements.' Customer information is displayed: 'Customer: Alexander Rhodes', 'Account #: 707789-11000', 'Total Credit: \$125,000.00', and 'Available Credit: \$108,747.44'. A table with columns 'Type', 'Program/Product', 'Invoice #', 'Total Amount', and 'Dealer Comments' is shown. Below the table, a message says 'Select the transaction which you wish to credit:'. A table with columns 'Date Entered', 'Confirmation #', 'Supplier Invoice #', 'Program', 'Product', 'Comments', and 'Total Billed Sales' displays three rows of transaction data. Each row has a 'Select' button. A 'Cancel Transaction Lookup' button is at the bottom right.

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Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers Reports User Administration My Profile

Submit a Transaction

* Indicates a required field.
* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes Total Credit: \$125,000.00
Account #: 707789-11000 Available Credit: \$108,747.44

Type	Program/Product	Invoice #	Total Amount	Dealer Comments
------	-----------------	-----------	--------------	-----------------

Select the transaction which you wish to credit:

	Date Entered	Confirmation #	Supplier Invoice #	Program	Product	Comments	Total Billed Sales
Select	08/28/2013	730459	124794	120 Days NP/NI			\$1,500.64
Select	08/28/2013	730453	124794	120 Days NP/NI			\$1,500.64
Select	08/28/2013	730455	124794	120 Days NP/NI			\$1,500.64

Cancel Transaction Lookup

After selecting **Transact** if there has previously been an invoice submitted on the customer's account, an adjustment can be made to the customer's account by processing a credit.

- Select **Credit** from the Type drop down box.

By selecting Credit the customer's previous purchase history will display.

- To apply the credit against a previously submitted invoice, click **Select** next to the invoice that the credit will be applied against.
 - Otherwise, to enter a credit for an amount greater than a single invoice previously submitted, click **Cancel Transaction Lookup**

Submit a Credit

The screenshot displays the 'Submit a Transaction' form within the Rabo AgriFinance Dealer Online system. The interface includes a header with the logo and navigation links (Logout, RaboAg.Com, Contact Us). A message center at the top states that RAF Offices will be closed on July 4th. Below this are tabs for 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The main form area is titled 'Submit a Transaction' and contains a legend for required fields and dealer comments. Customer information for Alexander Rhodes is shown, including a total credit of \$125,000.00 and an available credit of \$108,747.44. A table with columns for Type, Program/Product, Invoice #, Total Amount, and Dealer Comments is present. The 'Type' dropdown is set to 'Purchase Credit', and the 'Program/Product' dropdown is set to '-- Select A Program --'. The 'Invoice #' and 'Total Amount' fields are empty, and the 'Dealer Comments' field is also empty. 'Add' and 'Clear' buttons are next to the form fields. A 'Total:' label is below the form. At the bottom, there are 'Cancel Transaction' and 'Continue to Transaction' buttons. A note on the right side of the form states: '*To submit another invoice or calculate the total amount, please click on the add button.'

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Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers Reports User Administration My Profile

Submit a Transaction

* Indicates a required field.
* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes Total Credit: \$125,000.00
Account #: 707789-11000 Available Credit: \$108,747.44

Type	Program/Product	Invoice #	Total Amount	Dealer Comments
Purchase Credit	-- Select A Program --		\$	

Total:

Cancel Transaction Continue to Transaction

*To submit another invoice or calculate the total amount, please click on the add button.



- Select the program from the drop down list that is available. **Be careful to choose the correct program for each invoice that is submitted.**
- If there are product purchase requirements associated with the program, select the product from the drop down list. For multiple products on the same invoice, enter in each product in a separate line item.
 - *Note:* Some of the programs may not require product entry.
- Enter in the invoice number and dollar amount
- Enter in comments in the **Dealer Comments** field (optional). Comments entered are for user reference only and will not appear on customer statements.
- Select **Add** for multiple invoices or product purchases.
- Repeat steps above.
- When finished with invoices select **Continue to Transaction**.

Note: The option to credit will not appear until a purchase has first been posted to the customer's account.

Submit a Credit

UAT Environment

LogoutRaboAg.ComContact Us



Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Confirm Transaction

Please review and confirm the information on your invoice before proceeding with transaction

* Dealer comments do not appear on customer statements.

Customer: Alexander Rhodes

Total Credit: \$125,000.00

Account #: 707789-11000

Available Credit: \$108,747.44

TRANSACTION DETAIL					
Type	Program	Product	Invoice #	Total Amount	Dealer Comments
Credit	120 Days NP/NI		123794	\$500.00	

Grand Total:

(\$500.00)

Cancel Transaction

Make Changes

Submit Transaction

Verify that the program, products, invoices, and dollar amounts are correct.



- To delete all of the information that has been entered to this point for the transaction, select *Cancel Transaction*.
- To edit or add additional transactions, select **Make Changes**.
- To complete transaction, select **Submit Transaction**.

Note: Once you select **Submit Transaction**, you will not be able to make changes.

Submit a Credit

UAT Environment

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Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Transaction Completed

Your transaction was successfully completed. Please make note of your confirmation numbers below.

Customer:Alexander Rhodes

Account #:707789-11000

Total Credit:\$125,000.00

Available Credit:\$109,247.44

Invoice #	Confirmation #	Total Amount	Type	Program	Product
123794	730466	\$500.00	Credit	120 Days NP/NI	
Grand Total:		\$500.00			

Print Confirmation

Submit New Invoice

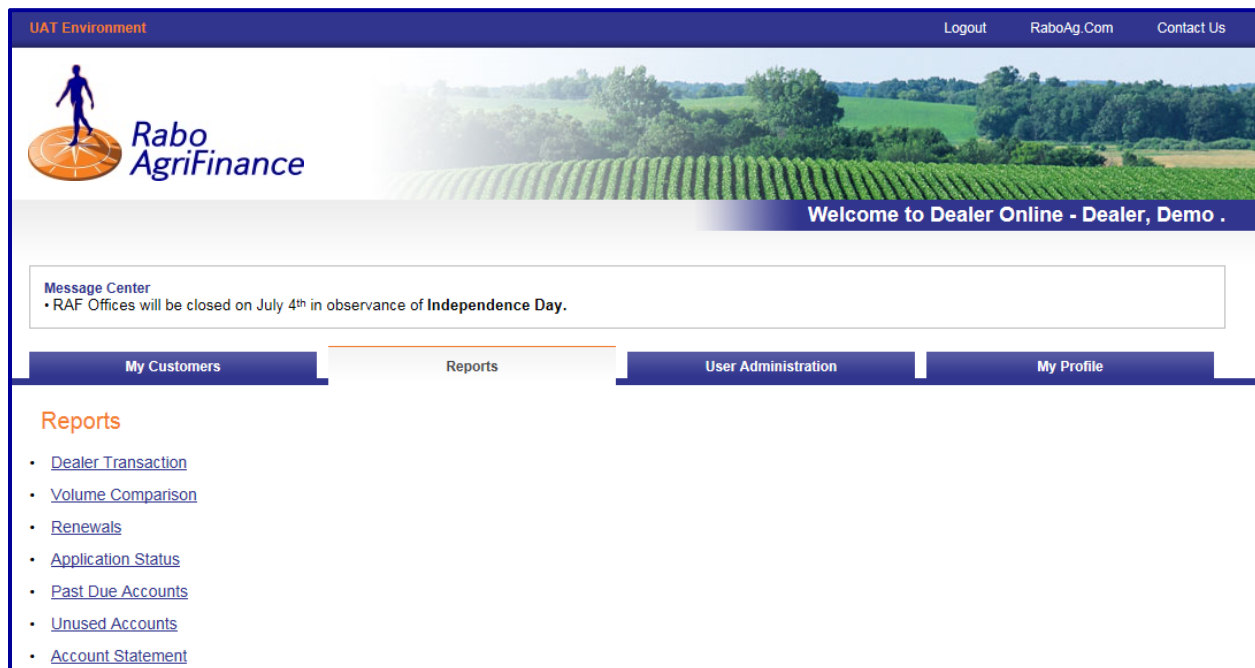
Back to Dealer Options

Receiving Confirmation Numbers

Submitting an invoice will return a confirmation number for each transaction.

Select **Print Confirmation** to print out the confirmation information for your records or to provide to the customer.

Reports



From the Landing Page of the website there are various reports available to manage the status of applications and renewals, transaction reconciliation, customer accounts that are past due, unused accounts or compare customer purchases from year to year.



Below is a list of the reports that are available:

- **Dealer Transaction**
- **Volume Comparison**
- **Renewals**
- **Application Status**
- **Past Due Accounts**
- **Unused Accounts**
- **Account Statement**

Reports

Dealer Transaction

UAT Environment
Logout
RaboAg.Com
Contact Us

Welcome to Dealer Online - Dealer, Demo .

Message Center

- RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers
Reports
User Administration
My Profile

Transaction Report

Modify the date span as needed and click Download to EXCEL.

[Download to Excel](#)

July 2013

Click on Calendar button to change date.

Start Date: 7/28/2013

End Date: 08/28/2013

July 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Retailer Name	Retailer City	Retailer State	Retailer Zip	Customer Name	Customer Name	Customer Name	Customer Name	Product	Program	Date Entered	Type	Invoice Number	Invoice Amount	Credit Service	Net Amount	Login ID	Confirmation	Paid Date
2	Dealer	Farmville	IA	54321	707789	Alexander	f Seymour	IL		120 Days	N 8/28/2013	Charge	124794	1500.64	0	1500.64	dealer	730453	
3	Dealer	Farmville	IA	54321	707789	Alexander	f Seymour	IL		120 Days	N 8/28/2013	Credit	123794	-500	0	-500	dealer	730466	
4	Dealer	Farmville	IA	54321	707789	Alexander	f Seymour	IL		120 Days	N 8/28/2013	Charge	124794	1500.64	0	1500.64	dealer	730459	
5	Dealer	Farmville	IA	54321	707789	Alexander	f Seymour	IL		120 Days	N 8/28/2013	Charge	124794	1500.64	0	1500.64	dealer	730455	

The **Transaction Report** allows you to select a range of dates for transactions submitted for processing. The report will default to a month worth of transactions, however change the range of dates as needed using the calendar tool.

- Use the calendar tool to select the range of dates
- Select **Download to Excel**

The report will open up an Excel file with the data for the date range specified. From there the normal Excel rules apply to sort, format, insert formulas, etc.

Reports

Volume Comparison

UAT Environment Logout RaboAg.Com Contact Us

Rabo AgriFinance

Welcome to Dealer Online - Dealer, Demo .

Message Center
• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers Reports User Administration My Profile

Volume Comparison Report

Click the column heading to sort the report differently.

Click on Calendar button to change date.

Start Date Range 1: 01/01/2012

End Date Range 1: 08/28/2012

Start Date Range 2: 01/01/2013

End Date Range 2: 08/28/2013

Run Report

Page Size: 25

Printer Friendly Version Download to Excel

Customer Name	Phone Number	City	State	RAF Account #	Total Volume Date Range 1	Total Volume Date Range 2	Percent Change	Retailer Name
Alexander Rhodes	(444) 555-6666	Seymour	IL	707789	\$0.00	\$4,001.92	100%	Dealer

The **Volume Comparison Report** compares customer's financed purchases from one date range to another and will display the change in the customer's history.

- Use the calendar tool to select the range of dates that are being compared
- Select **Run Report**

The report will display a listing of customers that have had transactions submitted under the financing for the date range specified and will display the dollar amount of the financing year over year for each customer. The report will also calculate the percent change in the two ranges specified to easily view whether their financed purchases have increased, decreased or remained the same.

Click on any of the headings on the report to change the sort order on the screen and then select either **Printer Friendly Version** to print the report or select **Download to Excel** to put the data in an Excel file.

Reports

Renewals

The screenshot displays the Rabo AgriFinance Dealer Online interface. At the top, there is a navigation bar with links for 'Logout', 'RaboAg.Com', and 'Contact Us'. Below this is a banner image of a green field with the Rabo AgriFinance logo on the left. A welcome message reads 'Welcome to Dealer Online - Dealer, Demo .'. A message center box states: 'Message Center • RAF Offices will be closed on July 4th in observance of Independence Day.' Below the message center is a navigation menu with 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The 'Reports' section is active, showing the 'Renewal Report' title. Instructions state: 'Click the column heading to sort the report differently.' There are buttons for 'Printer Friendly Version' and 'Download to Excel'. A search bar with 'Search' and 'Clear' buttons is present, along with a 'Last / Business:' input field. A 'Page Size' dropdown is set to '25'. A table lists customer accounts with columns for Customer Name, Account #, Street Address, City, State, Zip, Credit Limit, and Status.

Customer Name	Account #	Street Address	City	State	Zip	Credit Limit	Status
Alexander Rhodes	707789	22222 County Road 49	Seymour	IL	55555	\$125,000.00	In Review
Mark Brown	613815	59 Old Yeller Road	Oakley	NE	45678	\$75,000.00	In Review
Samuel Smith	707756	100 Planter Road	Jamestown	IN	12345	\$62,000.00	In Review

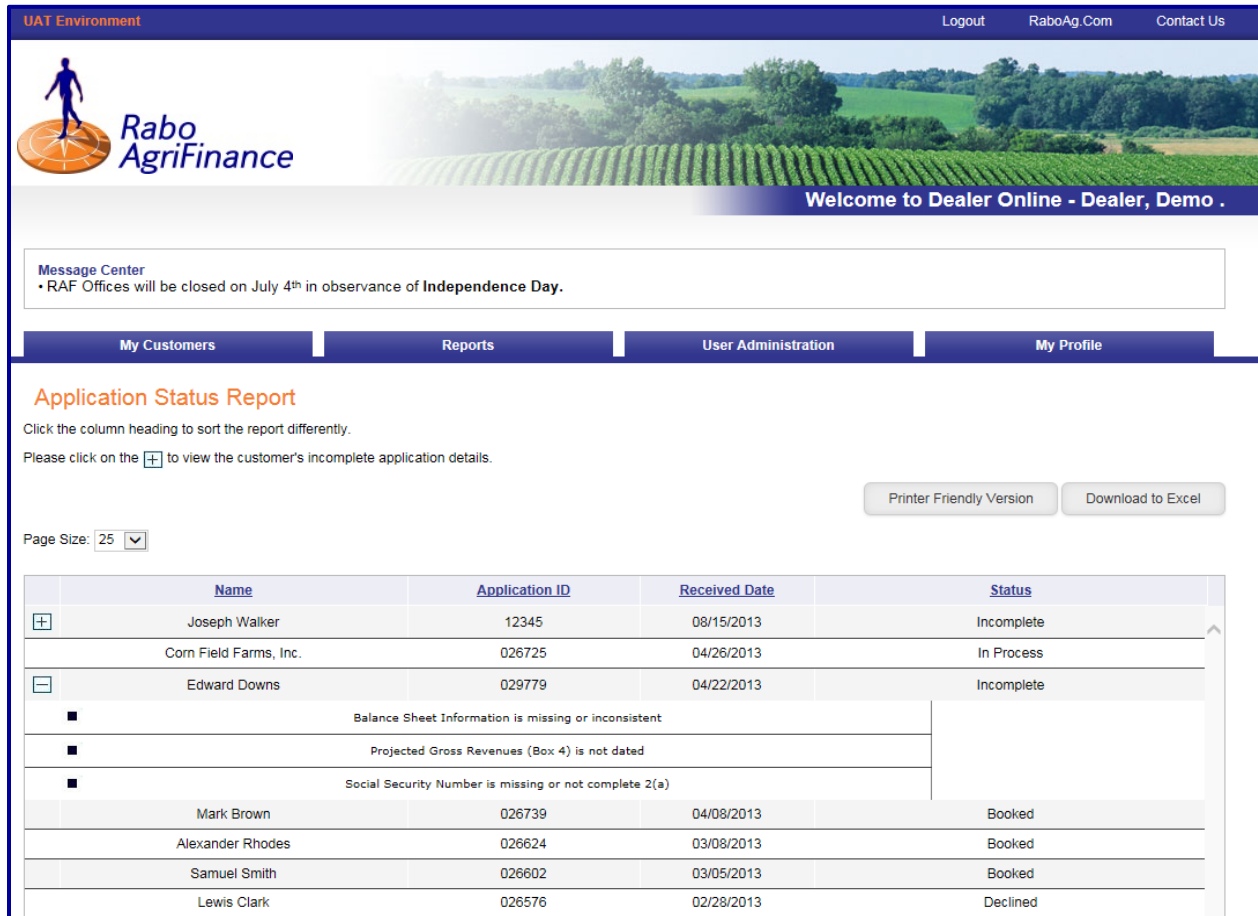
Annually in September of the year, Rabo AgriFinance processes customer accounts through renewal for the next crop year. During this process the customer's credit is reviewed to determine if the customer continues to meet the credit criteria. In some instances updated financial information is needed from the customer to determine their renewal status. If the customer is renewed or if there is additional information that is needed, a letter is mailed out to every customer to notify them of their renewal or to request the additional information.

The **Renewal Report** shows the status of the customer accounts during the renewal season. Statuses include In Review, Renewed, Need Financials, and Not Renewed/Re-apply.

- **In Review** – an Analyst is reviewing the customer's information for a determination of their renewal status
- **Renewed** – the customer is renewed for the next season. If the customer has a current balance with Rabo AgriFinance, this balance will need to be paid in full by the due date to keep their renewal status active
- **Need Financials** – Rabo AgriFinance has requested updated financial information from the customer to review to determine the customer's renewal status
- **Not Renewed/Re-apply** – the customer is not renewed and their account will be closed for the next season. The customer is welcome to re-apply for the financing to determine if they will qualify.

Reports

Application Status



The screenshot shows the Rabo AgriFinance Dealer Online interface. At the top, there's a navigation bar with 'Logout', 'RaboAg.Com', and 'Contact Us'. Below this is a banner image of a green field with the Rabo AgriFinance logo. A welcome message reads 'Welcome to Dealer Online - Dealer, Demo .'. A message center box states: 'Message Center • RAF Offices will be closed on July 4th in observance of Independence Day.' Below the message center are four tabs: 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The 'Reports' tab is selected, displaying the 'Application Status Report'. Instructions for sorting and viewing incomplete details are provided. There are buttons for 'Printer Friendly Version' and 'Download to Excel'. A 'Page Size' dropdown is set to 25. The report table has columns for Name, Application ID, Received Date, and Status. It lists several applications, including one for Edward Downs which is expanded to show missing information like Balance Sheet, Projected Gross Revenues, and Social Security Number.

	Name	Application ID	Received Date	Status
<input type="checkbox"/>	Joseph Walker	12345	08/15/2013	Incomplete
<input type="checkbox"/>	Corn Field Farms, Inc.	026725	04/26/2013	In Process
<input type="checkbox"/>	Edward Downs	029779	04/22/2013	Incomplete
<input type="checkbox"/>	Balance Sheet Information is missing or inconsistent			
<input type="checkbox"/>	Projected Gross Revenues (Box 4) is not dated			
<input type="checkbox"/>	Social Security Number is missing or not complete 2(a)			
<input type="checkbox"/>	Mark Brown	026739	04/08/2013	Booked
<input type="checkbox"/>	Alexander Rhodes	026624	03/08/2013	Booked
<input type="checkbox"/>	Samuel Smith	026602	03/05/2013	Booked
<input type="checkbox"/>	Lewis Clark	026576	02/28/2013	Declined

The **Application Status Report** is a listing of all of the applications that Rabo AgriFinance has received where your location has been listed in the dealer information on the customer's application. The report displays the date that the application was received as well as the status of the application.

The various application statuses are:

- **In Process** – the application was recently received and is currently under review by an Analyst.
- **Incomplete** – the application is missing required information. To continue processing the incomplete items need to be resolved.
 - To view the items missing on the application –click the ☐ symbol to expand the list.
- **Booked** – the application was approved for the financing. Click on the My Customers tab and either locate the customer on the listing or search for the customer to submit transactions on the customer's account.
- **Cancelled/Withdrawn** – the application was cancelled or withdrawn at the customer's request or due to various reasons such as, customer decided not to complete the necessary items, possibly set up in error, etc.
- **Decline** – the application is denied for the financing as it does not meet the criteria.

Reports

Past Due Accounts

The screenshot displays the Rabo AgriFinance Dealer Online interface. At the top, there's a navigation bar with 'UAT Environment', 'Logout', 'RaboAg.Com', and 'Contact Us'. Below this is a banner image of a field with the Rabo AgriFinance logo. A welcome message reads 'Welcome to Dealer Online - Dealer, Demo .'. A message center box states: 'Message Center • RAF Offices will be closed on July 4th in observance of Independence Day.' Below the message center is a navigation bar with 'My Customers', 'Reports', 'User Administration', and 'My Profile'. The 'Reports' section is active, showing the 'Past Due Report'. Instructions state: 'Click the column heading to sort the report differently.' A red warning message reads: 'Customers cannot transact on these accounts. The Account Balances may not reflect all interest and fees. Customers should contact Rabo AgriFinance at (888) 395-8505 for accurate payoff amounts.' There are buttons for 'Printer Friendly Version' and 'Download to Excel'. A 'Page Size' dropdown is set to '25'. A table with 7 columns is shown: Customer Name, Account #, Account Balance, Total Past Due Balance, Extension Granted, Recourse Type, and Date Due. The table contains one row for Michael Wells with an account balance of \$24,972.41 and a total past due balance of \$24,174.00.

Customer Name	Account #	Account Balance	Total Past Due Balance	Extension Granted	Recourse Type	Date Due
Michael Wells	618452	\$24,972.41	\$24,174.00	No	NONE	02/16/2013

The **Past Due Report** will display the customers that have balances on their accounts once the maturity date for the financing program has passed. The report will display the date that the account was due. If an extension has been granted the date that the account was extended to will display.

Click on any of the headings on the report to change the sort order on the screen and then select either [Printer Friendly Version](#) to print the report or select [Download to Excel](#) to put the data in an Excel file.



Note: Do not use the dollar amounts on this report as a payoff to give to the customer. Please ask the customer to call Rabo AgriFinance at 888-395-8505 for an accurate payoff amount.

Reports

Unused Accounts

UAT Environment

LogoutRaboAg.ComContact Us



Welcome to Dealer Online - Dealer, Demo .

Message Center

• RAF Offices will be closed on July 4th in observance of Independence Day.

My Customers

Reports

User Administration

My Profile

Unused Accounts Report

Click the column heading to sort the report differently.

Printer Friendly VersionDownload to Excel

Page Size: 25

Customer Name	Account #	Available Credit	Credit Limit	Phone Number	Street Address	City	State	Zip
Mark Brown	613815	\$75,000.00	\$75,000.00	(333) 444-1212	59 Old Yeller Road	Oakley	NE	45678
Samuel Smith	707756	\$62,000.00	\$62,000.00	(222) 555-1111	100 Planter Road	Jamestown	IN	12345



The **Unused Accounts Report** lists the active customer accounts that do not have a balance. Your team may use this list as a way to identify sales opportunities with the customers while utilizing the financing for their purchases.

Click on any of the headings on the report to change the sort order on the screen and then select either [Printer Friendly Version](#) to print the report or select [Download to Excel](#) to put the data in an Excel file.

Reports

Account Statement

UAT Environment
Logout
RaboAg.Com
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Welcome to Dealer Online - Dealer, Demo .



Message Center
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Account Statements

Click the column heading to sort the report differently.

Click on Calendar button to change date.

Start Date: 07/28/2013 
End Date: 08/28/2013 

LabelTransaction Total: \$4,001.92
LabelPayment Total: \$0.00
LabelCSF Total: \$0.00
LabelTotal Due: \$4,001.92

Run Report

Printer Friendly Version
Download to Excel

Date Entered	Customer	Account	Dealer Invoice	Confirmation Number	Program	Amount	CSF	Net Amount	Check/ACH ID	Entered By
08/28/2013	Alexander Rhodes Seymour, IL	707789	124794	730453	120 Days NP/NI	\$1,500.64	\$0.00	\$1,500.64	0	dealer
08/28/2013	Alexander Rhodes Seymour, IL	707789	124794	730455	120 Days NP/NI	\$1,500.64	\$0.00	\$1,500.64	0	dealer
08/28/2013	Alexander Rhodes Seymour, IL	707789	124794	730459	120 Days NP/NI	\$1,500.64	\$0.00	\$1,500.64	0	dealer
08/28/2013	Alexander Rhodes Seymour, IL	707789	123794	730466	120 Days NP/NI	(\$500.00)	\$0.00	(\$500.00)	0	dealer

The **Account Statements** report allows you to select a range of dates for transactions submitted for processing. The report will default to a month worth of transactions, however change the range of dates as needed using the calendar tool.

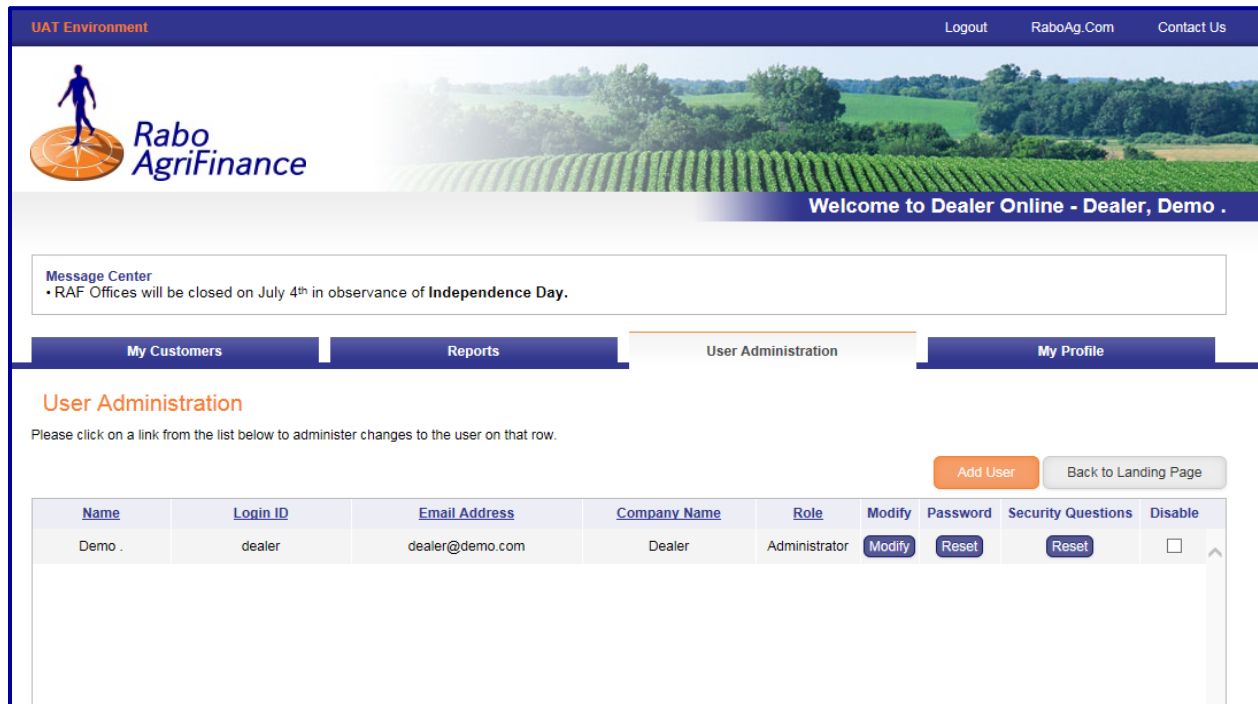
- Use the calendar tool to select the range of dates
- Select **Run Report**

This report reconciles the transactions submitted through the website against any payments that are remitted by Rabo AgriFinance. It will also display which user entered the transaction from your location to easily identify who submitted the transaction against the customer's account.

The report should also be used to identify if your location has a credit balance owing back to Rabo AgriFinance. When your location submits a credit transaction on a customer's account, that amount is due back to Rabo AgriFinance. This report is a resource for settlement of the amount due. For invoices showing the amount due for payment requests, please contact Rabo AgriFinance at 888-395-8505.

Click on any of the headings on the report to change the sort order on the screen and then select either **Printer Friendly Version** to print the report or select **Download to Excel** to put the data in an Excel file.

User Administration



The dealer can assign multiple users to their account each with different functionality capabilities.

The different roles are:

- **Administrator:** set up additional users in the website and assign access roles to the user, reset a user's password and security questions or disable a user's access as needed. The Administrator is also able to submit transactions and access reports.
- **Super User:** transact on a customer's account and access reports for the dealer in the website. This user cannot modify user administration records.
- **Transaction:** transact on a customer's account. This user does not have access to reports in the website and cannot modify user administration records.
- **Reporting:** access reports for the dealer in the website. This user cannot submit transactions on a customer's account and cannot modify user administration records.


To add a user to the website:

- Select **Add User**
- Enter in the user's First Name, Last Name, Login ID, Email address and assign their access role.
- Select **Save**

To remove a user's access to the website, check the **Disable** box associated with the user's information.

My Profile

UAT Environment Logout RaboAg.Com Contact Us

 Welcome to Dealer Online - Dealer, Demo .

Message Center
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My Customers Reports User Administration My Profile

My Profile

Change My Password Change My Security Questions/Answers Change My Security Image

Company Name:	Dealer		
Contact Person:			
Name:	Demo .	Phone:	(111) 555-2222
Email Address:		Fax:	
Mailing Address:	Remit-To Address:		
Address Line 1:	123 Anyroad	Address Line 1:	123 Anyroad
Address Line 2:		Address Line 2:	
City:	Farmville	City:	Farmville
Province/State:	IA	Province/State:	IA
Postal/Zip:	54321	Postal/Zip:	54321

The My Profile tab allows the user to view their profile information as set up during the registration process or by the Administrator. To change any of the profile information contact Rabo AgriFinance at 888-395-8505.

To change the password, security questions or security image, do so from this page or contact either the Administrator or Rabo AgriFinance.

- Select [Change My Password](#) and a new password will be emailed.
 - The temporary password is only available for 24 hours so be sure to login to change this password before it will expire.
- Select [Change My Security Questions/Answers](#) to clear out the existing questions and answers.
 - Select and answer 5 new security questions.
- Select [Change My Security Image](#) to clear the saved image.
 - Select a new security image



888-395-8505 RaboAg.com



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