



# 2023-2024 Online retailer Quick reference guide



## Immediate next steps:

After your TruChoice® Online registration is approved

**Retailer Use Agreement:** You will be prompted to sign this agreement when you log in. Click the “I Agree” button to electronically sign this agreement. (All users from each retail location will be required to sign this agreement. You will not be able to enter transactions until this agreement is signed.)

**Payment Set up:** Indicate how you would like to receive payment for transactions by clicking “Business Locations”, and then selecting “Payment Information”. If you do not change your payment preferences to ACH, the system will automatically default to mailing physical checks. If you select “ACH”, you must submit the ACH Request Form to support@truchoiceonline.com. Please allow 48 hours for processing, before entering transactions.

## Important program dates

Oct. 2, 2023:  
2023-2024 Program Season Begins

Nov. 15, 2023:  
Transaction Entry for 2023-2024 Season Begins

March 1, 2024:  
Last day to fund a prepay to earn 10% for Prepay Cash and 5% for a Prepay Loan Advance

Sep. 30, 2024:  
Transaction Entry for 2023-2024 Season Ends  
(transactions must be entered and approved)

## Prepay deposit options:

### Check deposit:

How to submit a farmer's prepay check

1. On the dashboard, look for the Prepay Portal and select “Open”.
2. Enter the customer's Business Partner ID into the search bar. If you do not have the customer's Business Partner ID, search by their last name and the city in which they are located, or business name. If you cannot locate your customer using these methods, contact TruChoice Online Support at 800-922-2368 (8:00 a.m. – 5:00 p.m. EST, M–F)
3. Click “Search” and select the customer from the list of results.
4. Have the customer sign the Prepay Agreement. Customer Prepay

Agreements must be emailed to the customer to sign through DocuSign prior to depositing funds.

5. Enter the “Cash Deposit Information”.
6. Review all deposit information and select “Submit for Cash Deposit”.
7. Review the Confirmation screen to verify the deposit was successful.
8. Deposit Summary will be sent to the farmer via the email entered in the system.

### Prepay loan advance:

How to submit a customer's loan advance

1. On the dashboard, look for the Prepay Portal and select “Open”.
2. Enter the customer's Business Partner ID into the search bar. If you do not have the customer's Business Partner ID, search by their last name and the city in which they are located. If you cannot locate your customer using these methods, contact TruChoice Online Support at 800-922-2368.

3. Select “Prepay Credit” at the top of the screen.
4. Enter the amount of the Loan Advance for which the customer is applying and hit “Submit”.

**Note:** Loan advances require the customer to have an approved loan. If your customer doesn't have a Loan Agreement in place, contact TruChoice® support at 800-922-2368 (8:00 a.m. – 5:00 p.m. EST, M–F).

## Balance check:

### How to locate a customer's available funds

1. Select "Transactions" from the tabs located on the Dashboard page.
2. Click "Search for Customer" and enter the customer's Business Partner ID in the appropriate field.
3. Select the customer to review their available Prepay funds and Loan credit displayed on the Customer Funds Summary screen (see below).

For the example listed below, the customer has an approved prepay account with available funds, as well as an approved loan with credit. If you enter a T&O transaction that totals \$50,000 - \$30,000 of the transaction will be applied toward the available prepay funds, and the remaining \$20,000 will be applied toward the customer's loan (financed).

### Key reminders

1. Loan interest will begin once the funds are advanced from the loan to the prepay account.

Change Customer	<b>Customer:</b> Doe, John (18364234) 1234 Main St., Anytown, IN 12121	<b>Business Location:</b> Green Lawns R US (1308221) 4567 Green St., Anytown, IN 12121
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Customer Fund Summary	
Prepay Agreement Status	Prepay Funds Available
Approved	\$30,000.00

  

Loan Agreement Status	Loan Status	Available Credit
Completed	Approved	\$20,000.00

## Transaction entry:

### How to enter a transaction towards a customer's loan or prepay funds

Transactions will automatically apply toward a customer's prepay loans first before applying to their Loan.

#### Always make sure to check a customer's available funds before submitting a transaction.

1. Select "Transactions" from the tabs located on the Dashboard page, and then select the appropriate Business Location (if applicable)
2. If the customer you are looking for is not listed, click "Search for Customer"
3. Enter customer's Business Partner ID in the appropriate field. If you do not have the customer's Business Partner ID, enter their last name or business name, and the city in which they are located
4. Select "T&O Product Transaction" from the Customer Fund Summary page
5. Enter transaction information: Invoice Number, Purchase Date, Product, Quantity, Unit Price. (Unit of Measure will automatically populate when you've selected a product. Make sure your unit of measure matches the unit of measure that auto populates within TruChoice and convert if your location uses a different unit of measure)
6. Click "Continue" after adding each line item to the transaction
7. After reading the TCOL Misuse Warning, click "Acknowledge"
8. Review each transaction line item for accuracy, and click "Submit"

## Return product:

### How to enter a return transaction (available Feb. 1, 2024)

1. Select "Transactions" from the tabs located on the Dashboard page
2. Select the customer from the list that appears on the Transactions page
3. Click "Return Product Transaction"
4. Select the Transaction ID for the transaction you'd like to return. Product value returned can be used again towards another eligible Corteva T&O product
5. Enter the quantity of the products that were returned, and click "Add Return"
6. Once all products have been added, follow steps 6 through 8 from above - "How to Enter a Transaction".

## Contact TruChoice support:

### How the TruChoice support team can help

- Registering a user on TruChoice Online
- Updating retail location information
- Searching for a customer's account
- Requesting a BP ID for a customer
- Understanding a customer's available funds
- Correcting a transaction
- Running a report for transaction information