

# Monthly Conservis **Tools**



## JANUARY

### Make Land Agreement Payments

- ☐ Enter Land Agreement Payable

### Purchase remaining inputs for next year (seed, chemical, fertilizer)

- ☐ Run Budget Input Detail Report
- ☐ Create Purchase Orders

## FEBRUARY

### Recertify Private/Commercial Pesticide License

- ☐ User Setup – Chemical Certification Number

### Preparation for Production Season

- ☐ Set up new Users
- ☐ Set up new Production Equipment
- ☐ Set up new Inputs with Default Costs & tied to CDMS

*Naming to match JD or Climate for ease of Machine Integration (MI) matching*

## MARCH

### Receive seed corn and seed beans

- ☐ Create Purchase Order Receipts
- ☐ Review PO Input Position Report

### Crop insurance coverage meeting with agent

- ☐ Field Setup – Update FSA Information
- ☐ Field Setup – Update Crop Insurance Information
- ☐ Use Crop Production Detail and FSA Acreage by Farm Reports

## APRIL

### Receive herbicide, insecticide and fungicide purchase

- ☐ Create Purchase Order Receipts
- ☐ Review PO Input Position Report

### Adjust planting plans and budgets because of weather

- ☐ Field Plans Bulk Update

### Manage Spreading and Planting Activities

- ☐ Monitor Dashboard Widgets
- ☐ Work Orders – Status Report

## MAY

### Reconcile Inventory & Return unused seed

- ☐ Purchase Order Returns

### Manage Planting & Spraying Activities

- ☐ Monitor Dashboard Widgets
- ☐ Work Orders – Status Report
- ☐ Address MI Needs Attention
- ☐ Run MI Audit post planting season

### Check mismatched crops report and fix any issues

## JUNE

### Manage Spraying Activities

- ☐ Monitor Dashboard Widgets
- ☐ Work Orders – Status Report
- ☐ Address MI Needs Attention

## Conservis Power User Best Practices

- Have Standard Operating Procedures (SOPs) for your team
- Ensure data is accurate and up to date
- Be proactive by using the Conservis Production and Harvest Readiness Checklists
- Leverage your Customer Success Manager as you have questions or need help – support@conservis.ag  
Phone: 612-424-6314
- Stay in the Conservis know:
  - Attend Monthly Webinars
  - Check out the Conservis Monthly Communication & What's New
  - Use Conservis Navigator
  - Attend Summits

## YEAR AROUND ACTIVITIES

Actual Accounting Uploads  
Grain Hauling  
Grain Marketing  
Monitor Dashboard Widgets  
Monitor Ownership Reports  
Monitor Plan versus Actual Reports  
Utilize Insights (Zone Economics and Analytics)

## JULY

### Report planted acres to FSA office (578 form) and crop insurance agent

- ☐ Production – FSA Acreage by Farm Report

### Manage Spraying Activities

- ☐ Monitor Dashboard Widgets
- ☐ Work Orders – Status Report
- ☐ Address MI Needs Attention

## AUGUST

### Meet with landlord to negotiate contracts and rent

- ☐ Create Land Agreements

### Preparation for Harvest Season

- ☐ Set up new Users
- ☐ Set up new Harvest Equipment
- ☐ Set up new Customers, Delivery Locations, and Contracts
- ☐ Ensure Bluetooth LiveLinks are installed
- ☐ Review Split Ticket link interval, Commercial Shrink Rates, Conversion Rates, and Target Moisture
- ☐ Update mobile app and confirm settings in Tool
- ☐ Zero out / adjust your Bin Inventory

### Wrap up Production Season

- ☐ Address MI needs Attention and run Audit post spraying season

## SEPTEMBER

### Crop Insurance Payment due

- ☐ Add Actual Expense to P&B

### Preparation for Harvest Season

- ☐ Truck Scales are calibrated
- ☐ Electronic Delivery Receipts are set up in Conservis (contact your CSM)

## OCTOBER

### Managed Custom Trucking and Work during harvest

- ☐ Upload Actual Overheads

### Manage Harvest Season

- ☐ Fix unmatched tickets
- ☐ Reconcile Yields
- ☐ Reconcile Inventory
- ☐ Reconcile Harvest Activity/Completed Fields
- ☐ Monitor Dashboard Widgets
- ☐ Monitor Ownership Reports – Summary Entity Inventory by Field

## NOVEMBER

### Manage Harvest Season

- ☐ Fix unmatched tickets
- ☐ Monitor Ownership Reports – Summary Entity Inventory by Field
- ☐ Monitor Dashboard Widgets
- ☐ Contracts & Settlements

### Prepping for next Crop Year's Activities

- ☐ Update to new Crop Year and Create Fields
- ☐ Assign Crops to Fields
- ☐ Farm designation for Fields
- ☐ Create End of Year Reconciliation Tickets
- ☐ Verify Inputs Inventory and convert last year's inventory to current year (ask CSM for help)
- ☐ Address MI needs Attention and run Audit post spreading season

### Year End Review and Insights

- ☐ Reconcile Profitability w/ Yield Data
- ☐ Ag Lender Meeting - Lender Ready Packet
- ☐ Submit Yields to FSA/Crop Insurance: Crop Production Detail and FSA 578 Reports

## DECEMBER

### Meet with agronomist to plan for next Crop Year

- ☐ Create plans for next year (Copy previous and Bulk Edit)
- ☐ Accounting uploads into Plans and Actuals (overhead, other expenses, and revenues)

### Seed Dealer Meeting

- ☐ Budget Input Detail Report

### OnFarm Internal planning/buying meeting

- ☐ Review Crop and Field Plans
- ☐ Budget Input Detail Report