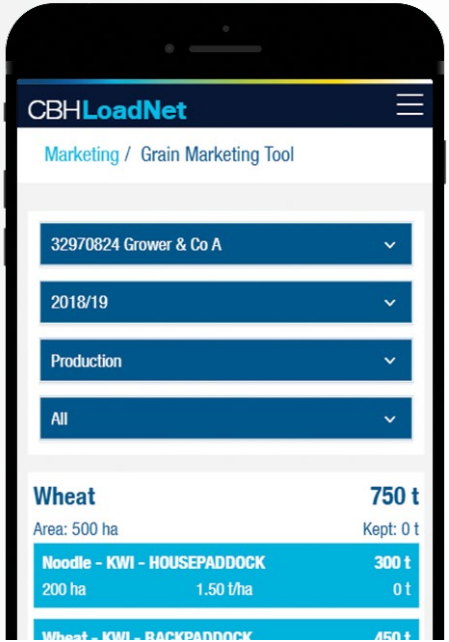
CBHLoadNet

GRAIN MARKETING TOOL



USER GUIDE

CBHGROUP

We are pleased to provide the Grain Marketing Tool in CBH LoadNet as a free resource for growers to use in developing and managing their own Grain Marketing Plans.

With the tool you can plan your grain marketing strategy end to end, from production to sales, with a view to whether you are over or under sold at any time.

As the tool is available in LoadNet, your CBH contracts will automatically be updated and you can manually add contracts to keep your position up to date and accurate.

To get the most out of the tool we recommend starting with your production and completing each section as much as you can. As this is a dynamic planner you can always revisit and update each section throughout the year as the season progresses.

You can also use the tool to create ‘hypothetical’ scenarios to see how it impacts your sales position.

Key features

View weighted average price to date and sales position (over or under sold) on any given day

Set price targets and receive price alerts via SMS or email when the LoadNet price hits your target

Automatic update of your CBH grain contracts to the tool

Position statements emailed when your selling periods end so you can stay up to date

Available on desktop, tablet and mobile so you can access from anywhere, anytime

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How to use this guide

The user guide is divided into different sections for each part of the Grain Marketing Tool so you can find detailed information on the specific section of the tool you need help with.

We hope you find the tool intuitive and easy to use. This guide provides more detailed information on each section and how to get the most out of the functions available.

Grain Marketing Tool on mobile

You can access the Grain Marketing Tool simply by logging in to your LoadNet account on your mobile device.

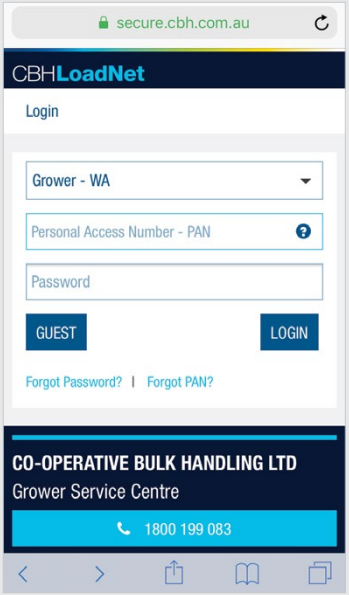
Open your mobile browser (i.e. safari, chrome) and enter the following address:

www.mobile.cbh.com.au

Login to CBH LoadNet with your unique Personal Access Number (PAN) and password.

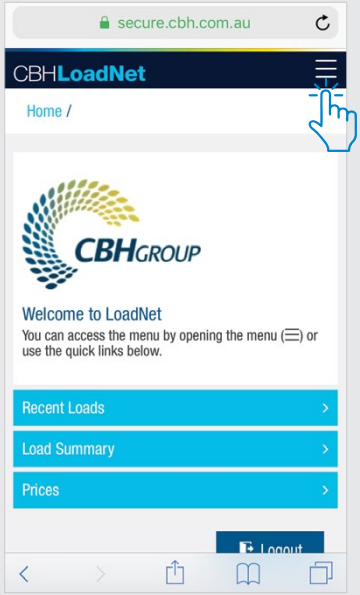
Once you've logged in, use the menu button to navigate to **Marketing > Grain Marketing Tool**

TIP: As CBH LoadNet is not an app, you won't find it in the app store - but there is a mobile friendly version of the website which you can add to your mobile home screen for easy access. Refer to page 5 for instructions.



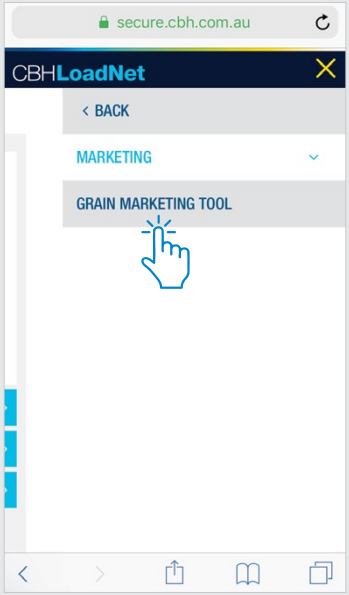
Step 1

Log in with your Personal Access Number (PAN) and password.



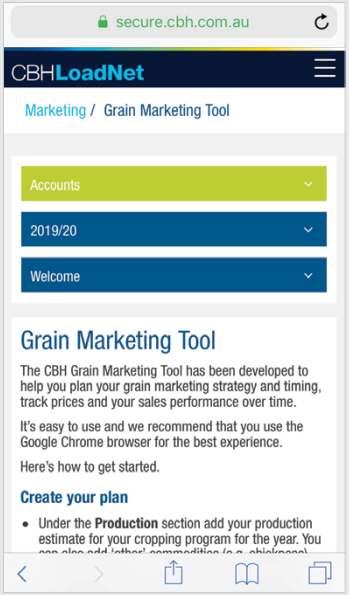
Step 2

Select the MENU in the top right corner of your screen.



Step 3

From the menu select **MARKETING** and then **GRAIN MARKETING TOOL**.

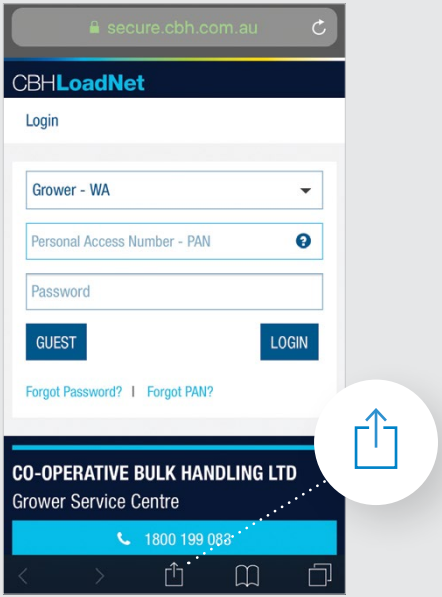


Step 4

The Grain Marketing Tool home page will display so you can add or update your plan.

How to add CBH LoadNet to your mobile device.

CBH LoadNet is a website not a downloadable app. To access it quickly and easily, save the LoadNet login screen to your mobile home screen and simply login when you need it. Here's how to do it in three easy steps:

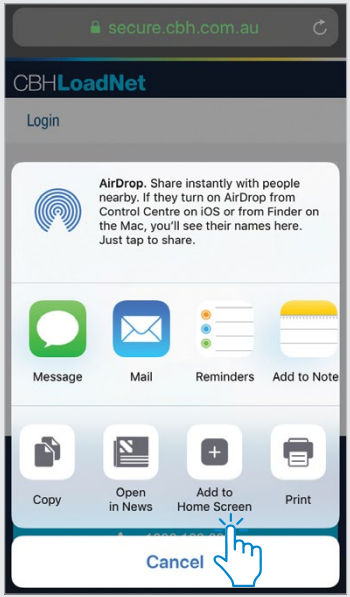


Step 1

Open your browser on your mobile device and enter the following address:

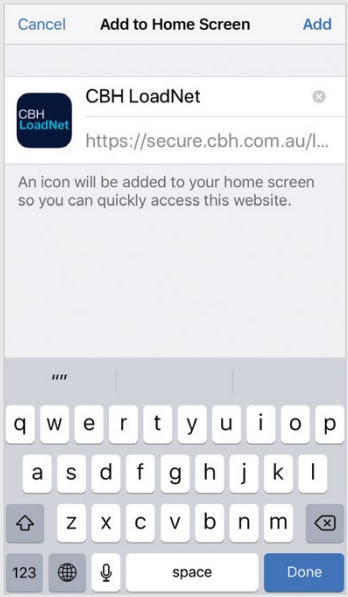
www.mobile.cbh.com.au

When the CBHLoadNet login screen appears, tap on the '**share**' icon to display the options available.



Step 2

When the options pop up, select the '**Add to Home Screen**' option.



Step 3

Select '**Add**' and the icon and name will be added to your mobile home screen so you can quickly access the LoadNet website.

TIP: Group all your CBH apps and websites together so they are all in the one place and easy to find.

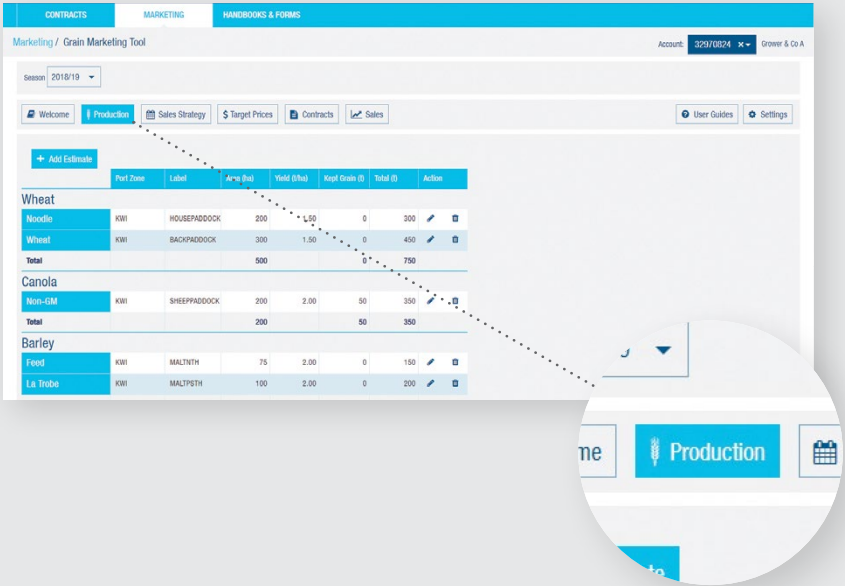
Section 1:
Production

The **PRODUCTION** tab is where you enter your production estimates for an account.

This helps you to keep track of total tonnes to sell throughout the season. It can be updated as yield estimates change throughout the year.

You can enter your production estimates for different commodities and grades by hectares sown and expected yield; or you can enter expected tonnes produced then yield per hectare or hectares sown and it will calculate total tonnes automatically for you.

When production estimates are created they will be grouped into tables by commodity. A sub-total will show for each commodity in the row labelled ‘total’ at the bottom of each commodity.


CONTRACTS
MARKETING
HANDBOOKS & FORMS
Marketing / Grain Marketing Tool
Account: 32970824
Grower & Co A
Season 2018/19
Welcome
Production
Sales Strategy
Target Prices
Contracts
Sales
User Guides
Settings
Add Estimate
Port Zone
Label
Area (ha)
Yield (t/ha)
Kept Grain (t)
Total (t)
Action
Wheat
Noodle KWI HOUSEPADDOCK 200 1.50 0 300
Wheat KWI BACKPADDOCK 300 1.50 0 450
Total 500 0 750
Canola
Non-GM KWI SHEEPPADDOCK 200 2.00 50 350
Total 200 50 350
Barley
Feed KWI MALTNTH 75 2.00 0 150
La Trobe KWI MALTPSTH 100 2.00 0 200
Production

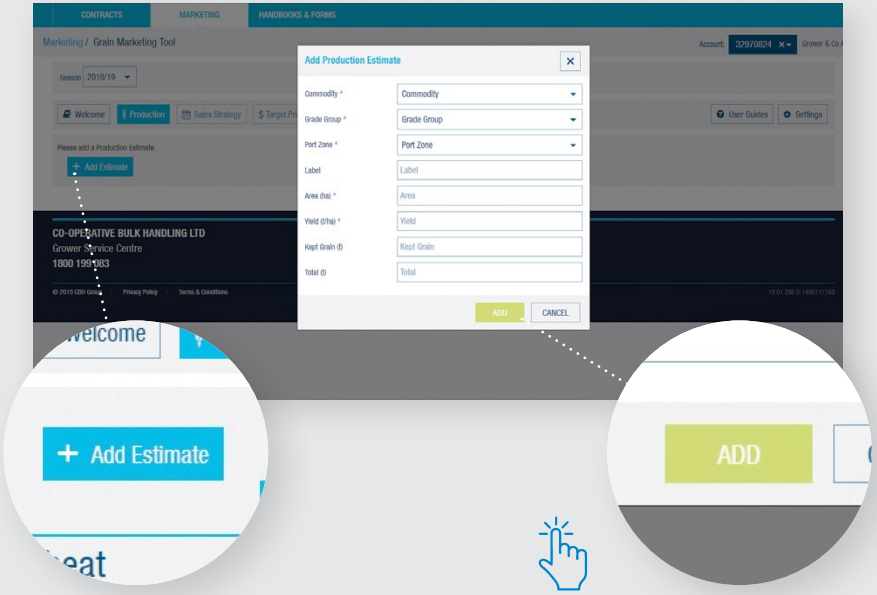
Add production estimate

To enter a new production estimate, click on the **ADD ESTIMATE** button located at the **top and bottom of the page**.

In the pop-up window, fill out the estimate fields (descriptions on next page) and select the **ADD** button.

It is important to select the correct grade group so your contracts are matched to the correct production estimate.

For example, if you are unsure how much malt to feed you'll get for your barley, you can create two separate line items for barley with one tracking malt and the other feed. You can then update the hectare split later in the season, or just track it against the variety.



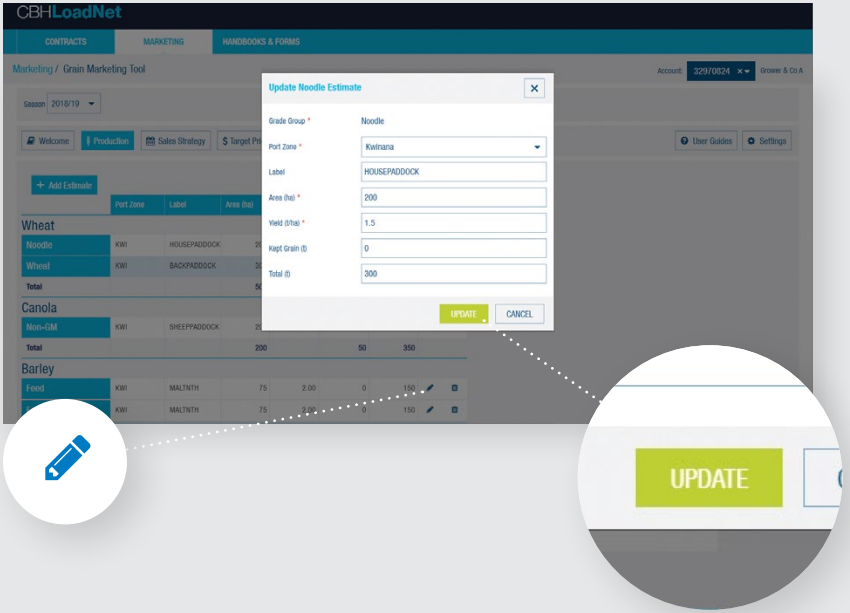
Once all fields have been completed, select the ADD button to add your production estimate.

Estimate field	Description
Commodity	Enter the commodity to be grown with the following options available - **Wheat, Canola, Barley, Lupins, Oats and Other**.
Grade group	Choose the grade(s) based on the commodity selected. If **Other** is chosen as the commodity, you can enter the name as free-text for what you are growing (i.e. Chickpeas). Once entered, this will become an available option for future selection.
Port Zone	Enter the port zone that the commodity/grade will be delivered to. This field is required as prices can vary by port zone.
Label	This is a free text field that allows you to enter a unique identifier for the grade group to assist with identifying between different properties (i.e. North Farm) or varieties (i.e. Zen, Ninja). This will help you distinguish between multiple line items for the same commodity, grade group and port zone dependent on your requirements and how detailed you'd like to make your sales strategy/grain marketing plan.
Area (ha)	Enter the area in hectares sown for the commodity and grade group.
Yield (t/ha)	Enter the estimated yield in tonnes per hectare that the sown area is expected to produce. This can be updated throughout the year as required and you gain more certainty over seasonal conditions and should be kept up to date.
Kept Grain (t)	Enter the quantity of grain in tonnes that you do not plan to sell. For example, if you are retaining for seed or selling privately into the domestic market. This ensures you won't oversell when planning sales for your total production, by accounting for kept grain. For example, if you are selling all your lupins domestically but would still like to track the lupin export price, set 'kept tonnes' to equal total production.
Total (t)	This is the total tonnes estimated to be available for sale and will be calculated based on the values entered for Area (ha) x Yield (t/ha) - Kept Grain (t).

Update production estimate

Select the pencil icon in the **ACTION** column and row that needs to be updated.

A pop-up window will appear (the same as the add production estimate pop-up window). Make the required changes and select the **UPDATE** button to save changes

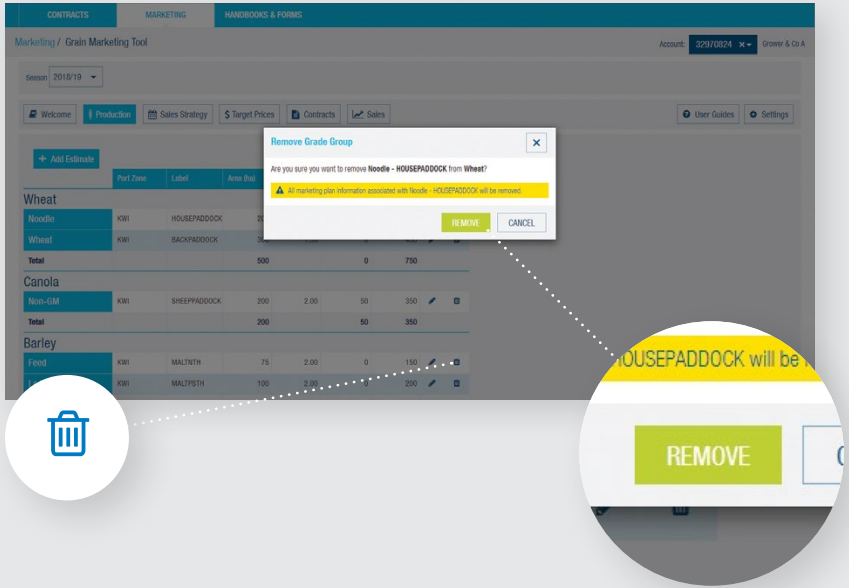


TIP: The Grain Marketing tool automatically saves as you go so you won't lose any of your changes.

Delete production estimate

Select the trash can icon in the **ACTION** column and row that needs to be deleted.

In the pop-up window that appears select the **REMOVE** button to delete the production estimate from your plan.

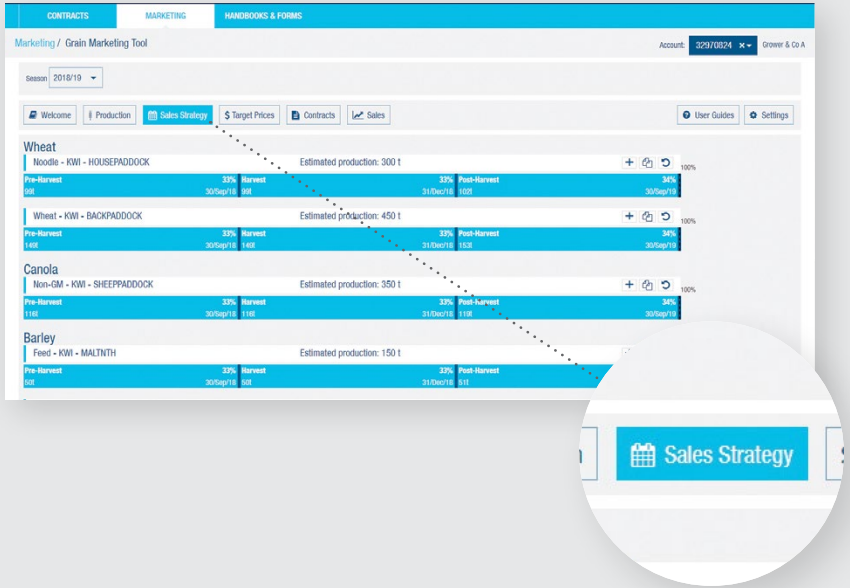


Section 2:
Sales Strategy

The **SALES STRATEGY** tab allows you to set your selling strategy and timing for each line item of your production estimate.

You can set up your own selling period or use the default periods available in the tool.

The default is a guide to get you started and has three selling periods for **Pre-harvest**, **Harvest**, and **Post-harvest**, evenly divided between total production planned to be sold in each. These can be edited or deleted and additional selling periods can be added to create a more detailed plan.



Add a selling period

Select the **ADD** button (plus icon) on the right-hand side of the line item.

Enter the required fields in the pop-up window that appears including:

- **Name** (selling period name),
- **End Date** (selling period end date),
- **Sales** (total production of this line item planned to be sold in this selling period).

When all data is entered, select the **ADD** button.

The new selling period will be sorted in chronological order with the other selling periods.

Adjusting a selling period

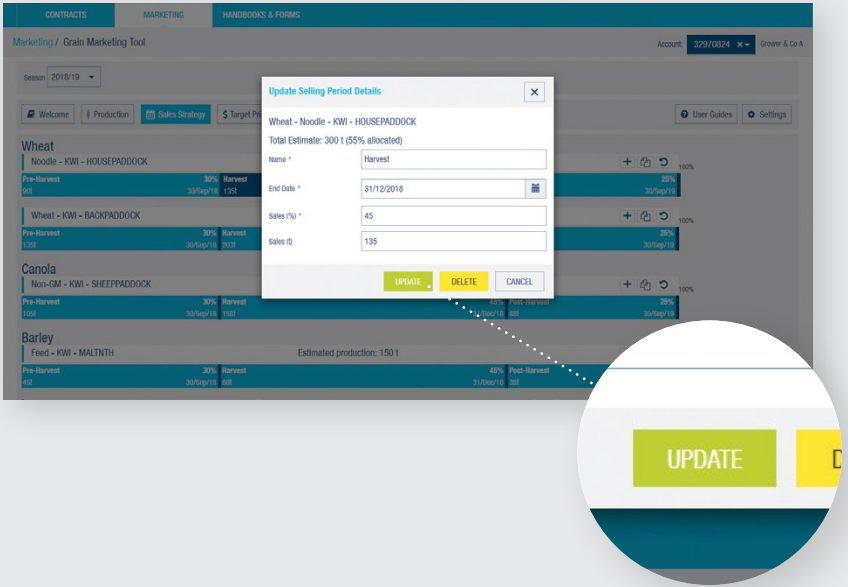
There are two ways to adjust the sales percentage (%) of a selling period:

1. Use the **SLIDER** function by placing your cursor (or finger) over the thick dark blue line between selling periods and an arrow will display. Click and drag to increase or decrease the size to adjust the percentage for that selling period.
2. Select the selling period and update the selling period details manually.

Please note that the sales periods for a line item must add up to 100% or an error message will appear on the page to inform you that planned sales for a line item are less than or more than 100% of planned production. This ensures you don't over or under sell.

Update a selling period

Select period to update the **name**, **end date** and **sales** then select **UPDATE** to save changes or **CANCEL** to discard changes.

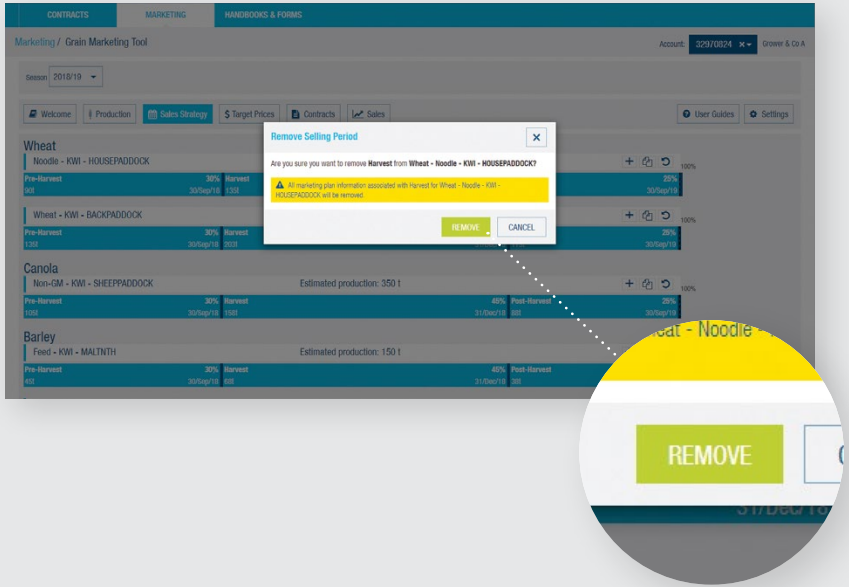


Delete a selling period

Select the period to delete and then select **DELETE**.

A warning message will appear confirming your intention to permanently delete the selling period.

Select the **REMOVE** button to continue or **CANCEL** if you change your mind.



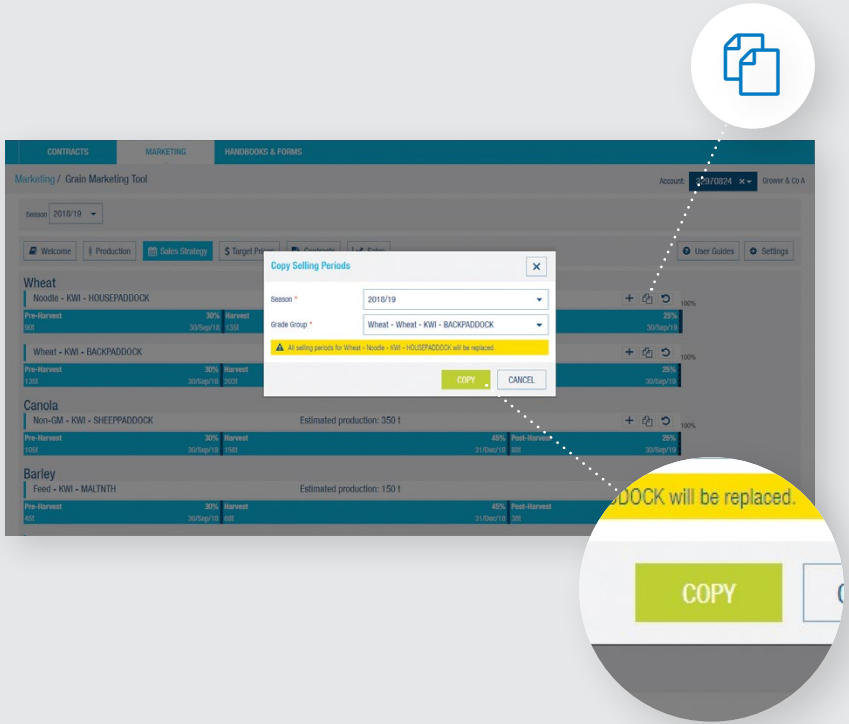
Warning: if you delete a selling period you cannot recover it and will need to start again.

Copy a selling period

You can copy selling periods from another line item in the same or different season to the selected line item.

Select the **COPY SELLING PERIODS** button (copy icon) on the right-hand side of the line item you want to copy selling periods **TO**.

In the pop-up window select the season and period that you want to copy **FROM** using the drop down menus and then select **COPY**.



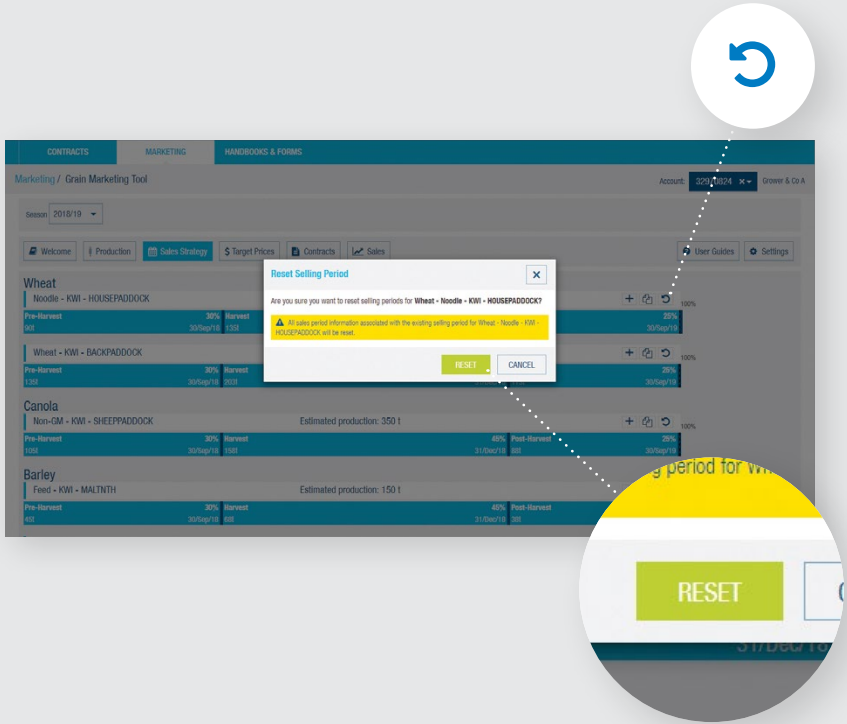
Warning: copying selling periods from one line item to another will overwrite any selling periods already set up.

Reset selling period to default

You can reset your selling periods for a line item back to the default selling periods of **Pre-harvest**, **Harvest** and **Post-harvest**. This will overwrite any changes to selling periods for that line item and replace them with the default selling periods.

Select the **RESET TO DEFAULTS** button (arrow icon) on the right-hand side of the line item you wish to reset.

In the pop-up window select **RESET** to update to the default periods, or **CANCEL** if you change your mind.



Warning: resetting selling periods will overwrite any selling periods set up for the selected line item.

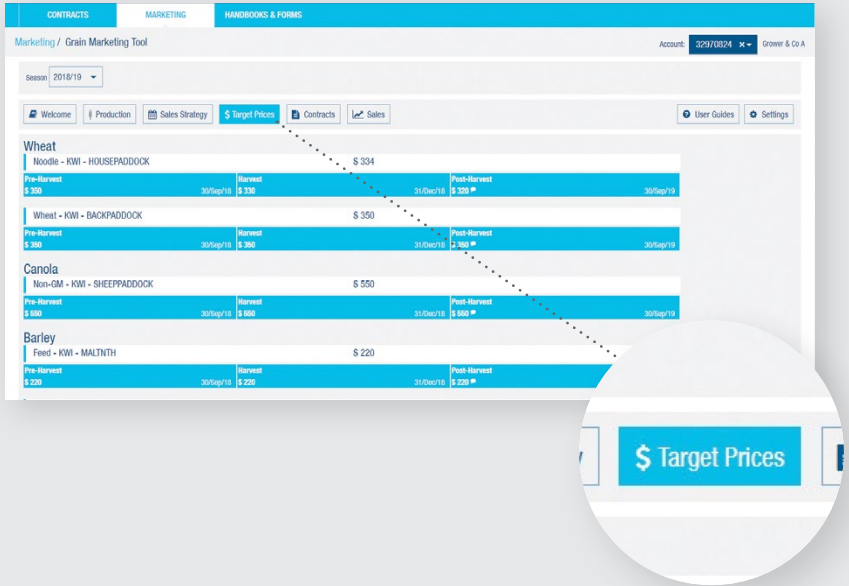
Section 3:
Target Prices

The **TARGET PRICES** tab allows you to set target prices for your grain sales.

Prices can be set by line item and across selling periods, or you can set different prices per selling period.

Your target prices are then tracked against the current CBH prices available in LoadNet.

This will be the price at which you receive an alert, either SMS or email, when the LoadNet daily published price matches it.



Set a target price

Select the selling period line item and enter the following details:

1 Grade to Track

Select the grade you want to track the price of in relation to your target price for the line item. For example, if you are growing Noodle Wheat varieties and select ANW2 in the 'Grade to Track' field, you will be notified when the ANW2 price reaches the target price(s) you set for this line item in each selling period. Similarly, if you want to track the ASW1 price as opposed to tracking the base grade APW1.

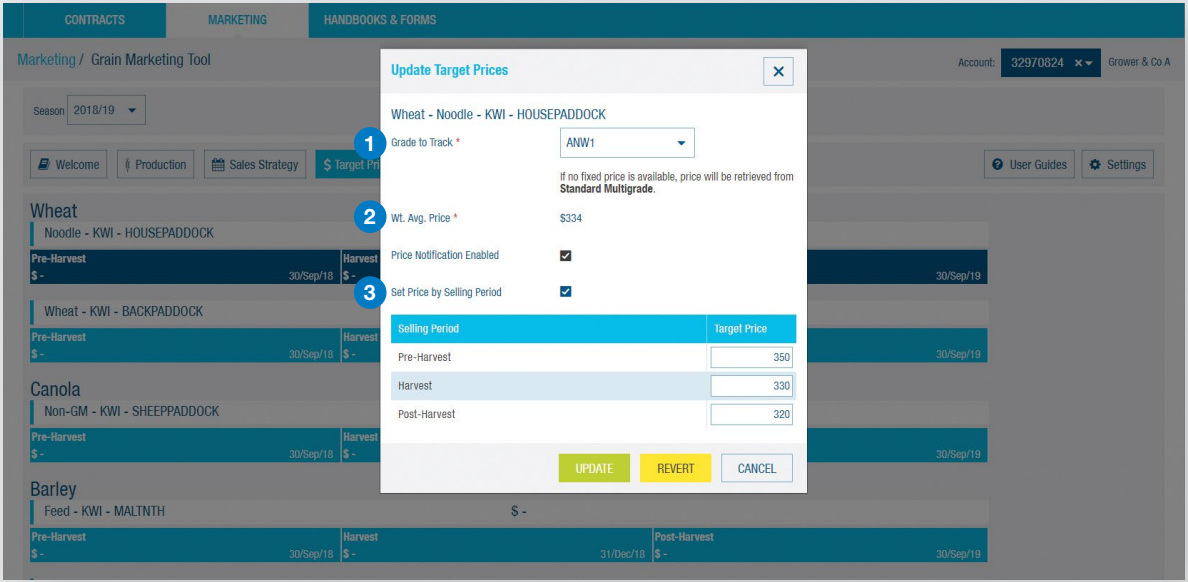
2 Avg. Target Price

This is the weighted average target price across selling periods. It can be used to set a single target price for all selling periods on that line item by entering the desired target price and selecting the Update button.

3 Set Price by Selling Period

Selecting this checkbox expands the pop-up window to show the selling periods for the line item where you can enter target prices for each period. Once complete, select the Update button to save your changes.

This is an advanced setting if you want to track prices closely for each sales period. The weighted average price will update according to the prices you enter for each period and tonnes.


CONTRACTS
MARKETING
HANDBOOKS & FORMS
Marketing / Grain Marketing Tool
Account: 32970824
Grower & Co A
Season 2018/19
Welcome
Production
Sales Strategy
$ Target Pri
User Guides
Settings
Wheat
Noodle - KWI - HOUSEPADDOCK
Pre-Harvest
$ -
30/Sep/18
Harvest
$ -
30/Sep/19
Wheat - KWI - BACKPADDOCK
Canola
Non-GM - KWI - SHEEPPADDOCK
Barley
Feed - KWI - MALTNTH
$ -
Post-Harvest
31/Dec/18
Update Target Prices
Wheat - Noodle - KWI - HOUSEPADDOCK
1
Grade to Track *
ANW1
If no fixed price is available, price will be retrieved from Standard Multigrade.
2
Wt. Avg. Price *
$334
Price Notification Enabled
3
Set Price by Selling Period
Selling Period
Target Price
Pre-Harvest
350
Harvest
330
Post-Harvest
320
UPDATE
REVERT
CANCEL

Section 4:
Contracts

The **CONTRACTS** tab displays a list of contracts that have been written for your account and season specified in the marketing plan.

Its purpose is to keep track of your sales against your planned production with details of what commodity and grade were sold, at what price, how much, and when. This allows you to compare and accurately track your account position against planned to date in the **SALES** tab.

CBH contracts automatically listed

Contracts you have taken out with CBH will automatically be listed in this section and you have the ability to manually enter other contracts.

Some contracts may not match to your production and in this case, you will need to manually assign them to your production estimates if you'd like to assign them differently.

Manual contracts

When you add manual contracts, there is no requirement to enter the name of the marketer, contract number or any other details that you may want to keep confidential, however there are free-text fields (notes, contract number) that you can use to enter details for your own reference if required.

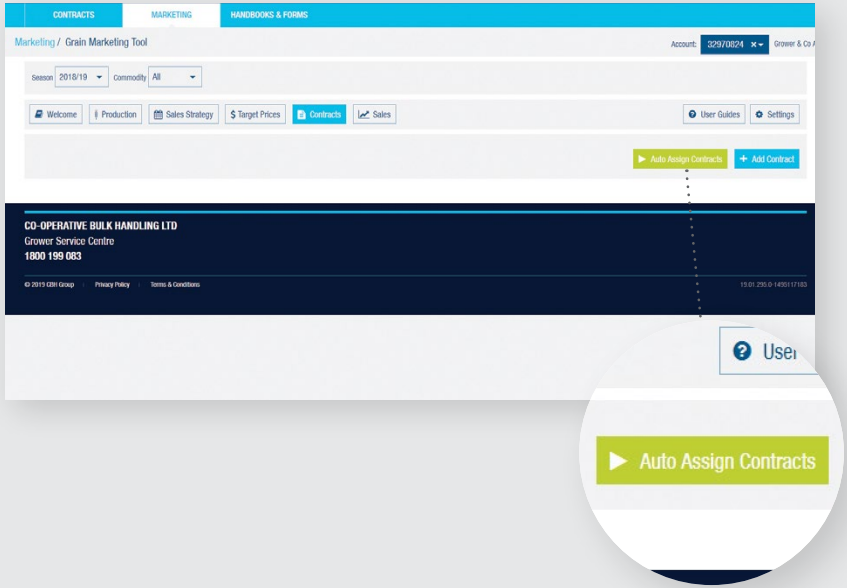
Automatic contract assignment

When initially setting up a Grain Marketing Plan for an account and season, automatic contract assignment is turned off.

Once you have completed the **Production**, **Sales Strategy**, and **Target Prices**, you can enable automatic contract assignment on the **CONTRACTS** tab by clicking the **AUTO ASSIGN CONTRACTS** button.

From here on any existing and new contracts will be automatically assigned to your production.

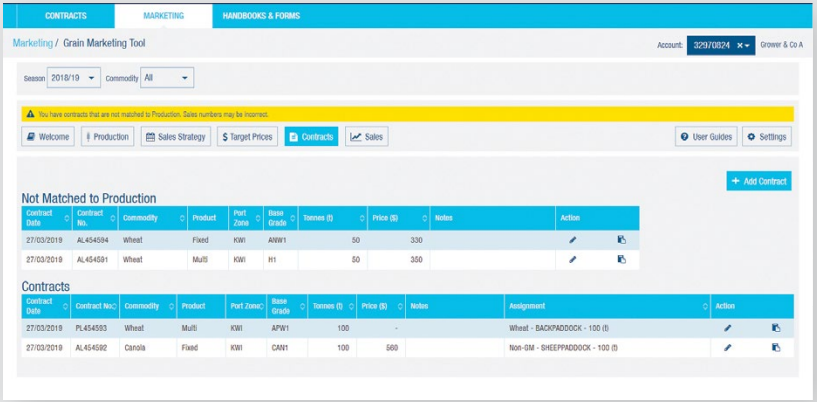
A reminder that this is a planning tool and not an execution too. You will need to nominate deliveries in LoadNet in order to fulfill your contracts.



When automatic contract assignment is turned on, contracts that are entered (either CBH contracts from LoadNet, or manually entered contracts) will automatically assign tonnes against production estimate line items that match the contract values (i.e. commodity, grade & port zone).

If multiple plan line items match the contract, the contract tonnes will be split across these line items in proportion to the % of production tonnes for each line item and the total production sum of those line items.

This is to ensure your sales position displays accurately. You can override this by selecting the **EDIT** button (pencil icon) and manually re-assign tonnes to production yourself, for any contract.



Contracts not matched to production

If automatic assignment is enabled and there is no matching production line item to assign a contract to, it will appear in a table titled **Not Matched to Production** at the top of the page.

Potential causes and solutions:

Manual contracts

If the contract in question is a manually entered contract, ensure that the details you have entered for the contract such as commodity, grade and port zone match a line item from the Production tab. For example, if Kwinana port zone (KWI) has been selected on the contract, but all production estimate line items are set to Geraldton (GER) port zone, the contract will not be able to be assigned to any line items.

No production estimate

If there is no line item that matches, this may mean that you will need to set up a production estimate to reflect this contracted grade/ commodity, or a line item already entered may need to be updated if details were set up incorrectly. Contact your local CBH Business Relationship Manager for assistance.

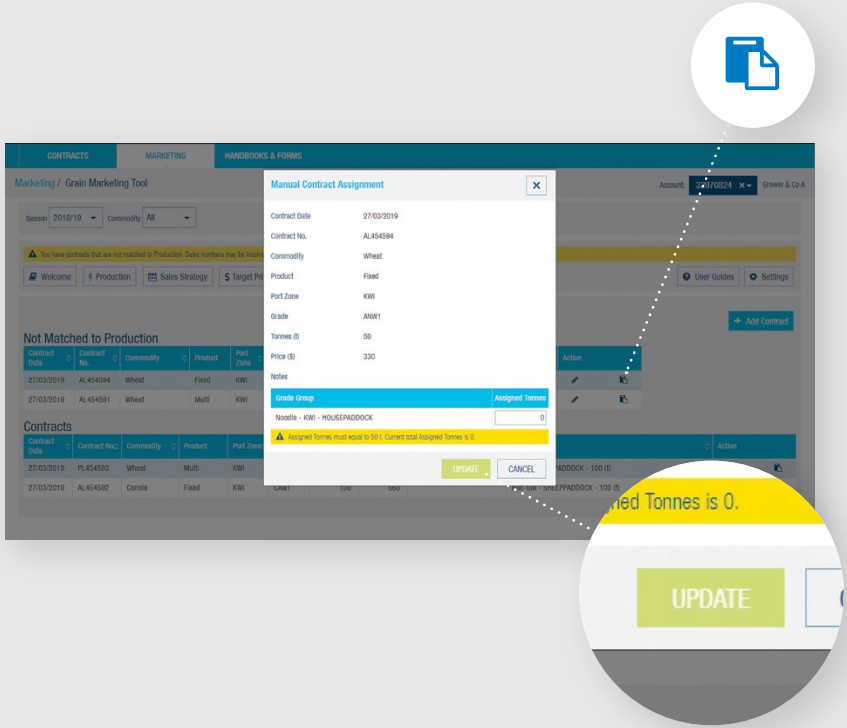
Update a contract assignment

To update the assignment of a contract (i.e. which production line item a contract is assigned to and tonnes), select the **ASSIGN CONTRACT** button (clipboard icon) in the **ACTION** column of the relevant contract.

A pop-up window will show the contract details with a table of the available plan line items that match the contract.

To assign, enter the number in tonnes in the **Assigned Tonnes** box for the relevant line item. Total tonnes entered across line items must equal the tonnes sold on the contract otherwise you will be unable to save the changes.

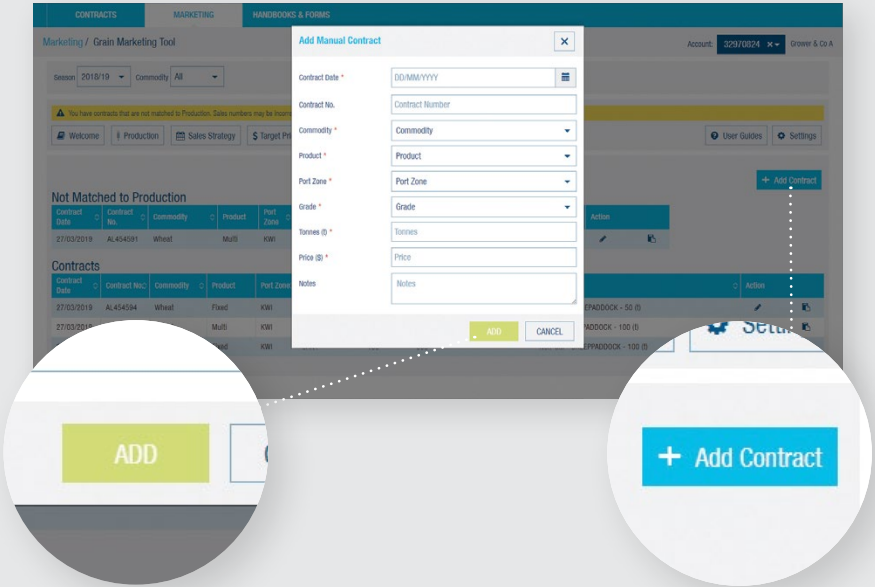
Once satisfied with the assignment and there is no total error message, select the **UPDATE** button to save changes.



Add a manual contract

To add a contract that was made with a marketer other than CBH, or to input any hypothetical contract scenarios, select the **ADD CONTRACT** button.

In the pop-up window that appears enter the contract details (see next page) and select the **ADD** button.



TIP: In the 'notes' section you may like to record payment terms (i.e. deferred, 7 days etc) or spreads for ease of reference later in the year when you come to nominate your deliveries.

Add a manual contract cont.

Contract Date	Enter the date the contract was agreed or finalised. This is required so that sales can be matched to a selling period.
Contract No.	This is a non-mandatory field and can be left blank or filled out for your own reference.
Commodity	Select the commodity that was sold with options for Wheat, Canola, Barley, Lupins, Oats or Other.
Product	Select cash or pool contract. If selecting 'pool' you will need to manually enter the current Estimated Pool Return (EPR) as the price.
Port Zone	Select the port zone the commodity was sold in.
Grade	Select the grade for the commodity. For multigrade, choose the base grade of the multigrade contract.
Tonnes (t)	Enter how many tonnes the contract is for.
Price ($)	Enter the dollar per tonne agreed for the contact. Revenue will be automatically calculated. This field is optional for pool contracts.
Notes	This is a non-mandatory field to allow you to enter any other relevant information or notes that you may need for reference, relevant to the contract/sale (i.e. payment terms, deferred, note on spreads etc.)

Update a manual contract

To update the details of a manual contract, select **EDIT** (pencil icon) in the **ACTION** column.

You can easily identify a manual contract as it will have a **DELETE** (trash can icon) next to it.

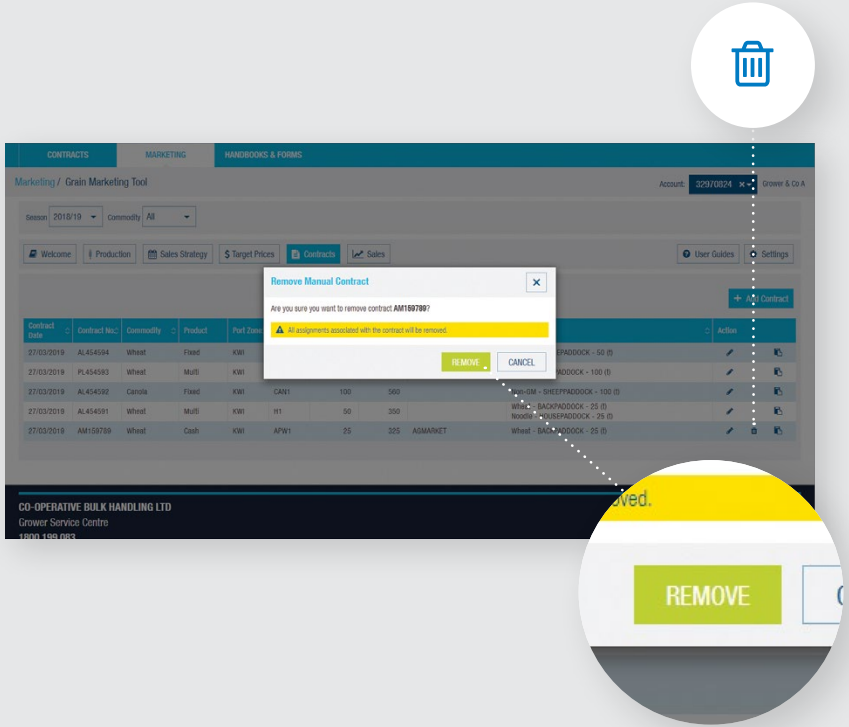
Edit the details you need and then select **UPDATE** to save your changes.

Please note that CBH contracts cannot be deleted but you can manually re-assign them to your production if required.

Delete a manual contract

To delete a manual contract, select **DELETE** (trash can icon) in the **ACTION** column.

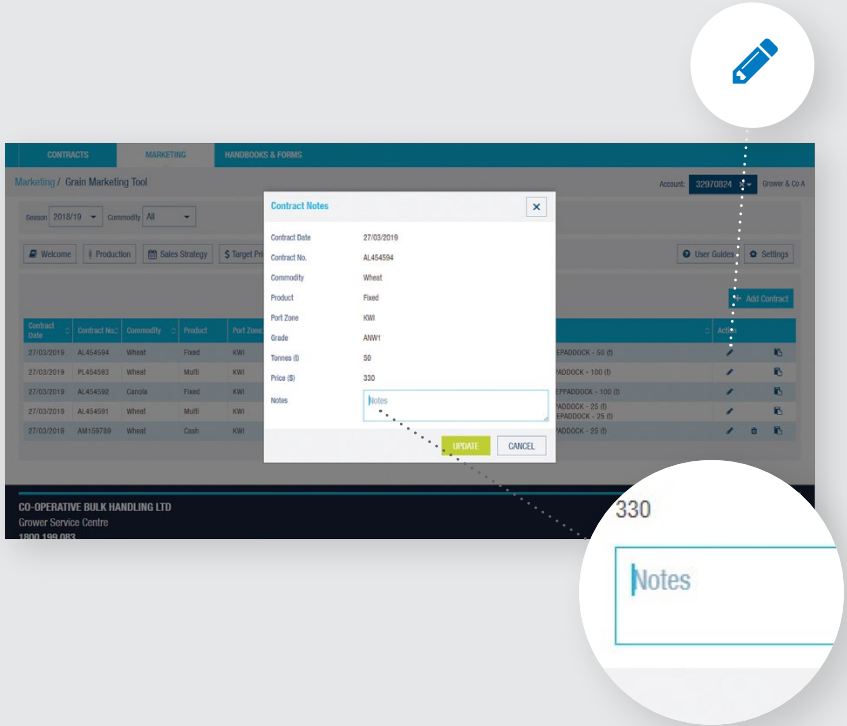
When the confirmation message appears, select **REMOVE** to permanently delete the contract or **CANCEL** if you change your mind.



Add notes to a CBH contract

You can add or edit notes for your CBH contract from LoadNet by selecting the **EDIT** (pencil icon) in the **ACTION** column.

Enter your notes and select **UPDATE** to save your changes or **CANCEL** if you change your mind.



Section 5:
Sales

The **SALES** tab displays an overview on how you are tracking against your plan.

Production estimates, selling periods and target prices are tracked against your actual sales with an overview of your sales performance at a glance.

You can easily see your sales position at a glance with the progress bar.

Line items set up on the **PRODUCTION TAB** are displayed here and divided into tables by commodity.

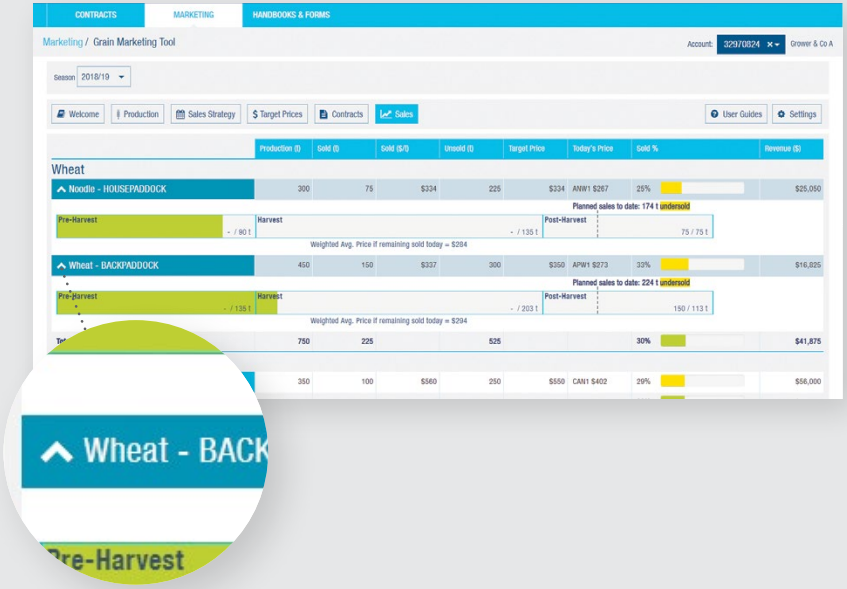
Each line item has sales progress demonstrated in total (t), price per tonne ($/t) and percentages (%).

Columns shown in the tables are explained below:

Production (t)	Total estimated production (tonnes from the Production tab).
Sold (t)	Total sales recorded against the line item to date (tonnes from the Contracts tab).
Sold ($/t)	Average price per tonne achieved in sales to date (from the Contracts tab).
Unsold (t)	How many tonnes of estimated production remain unsold, calculated by subtracting sold tonnes from tonnes estimated to be produced.
Today's Price	The last published price for the fixed grade on LoadNet (if available) or default multigrade price for the selected Grade to Track set in the Target Prices tab for that line item. If a price is inactive (such as after close of business), the value in this field is greyed out.
Target Price	The average target price weighted by volume (tonnes taken across selling periods) for that line item, set in the Target Prices tab.
Sold %	Percentage sold to date. A visual representation of the proportion of estimated production that has been sold and allocated to that line item to date.
Revenue ($)	Revenue generated to date against a line item calculated on tonnes sold for that line item and weighted average price per tonne achieved (from the Contracts tab).

Expand the sales view

To **EXPAND** a line item and view more detail click on the arrow in the line item. Multiple line items can be expanded at once in the desktop version of the tool.



The expanded view shows the selling periods and information within it such as the name of selling period, how much grain was sold of the target set for that selling period, and selling period end date.

The green progress bar shows you how much of that commodity and grade you have sold to date, tracking cumulatively against your planned tonnes.

Today's point in time on the selling period tracking is represented as a dashed vertical line through the selling periods with text above stating whether a line item is over or under sold as of today, and by how much.

A field called **Weighted Avg. Price if remaining Sold Today** calculates the average price per tonne you would achieve if you sold all the remaining estimated production at today's price. This takes into account your existing contracts as well as today's price.

Section 6:
Notification Settings

In the **SETTINGS** tab you can select your required notifications by recipient and preferences.

This is defaulted to the primary contact for the account contained in CBH's database.

Set primary contact to receive notifications

A list of account contacts is displayed with first and last name, mobile phone number and email address (if available).

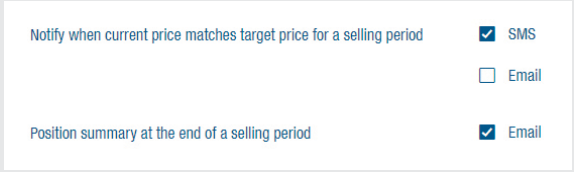
Please note that only one contact can be selected to receive notifications.

If a contact is selected that does not have a valid mobile number or email address, an error message is displayed.

Please contact the Grower Service Centre on **1800 199 083** to update your contact details if required, or if a field is missing.

Set notification preferences

You can choose the notification preferences for email and/or SMS or turn off all notifications by unchecking all boxes.



Need help?

Your local CBH Business Relationship Manager is on hand to help you with setting up and managing your sales or if you have any questions in executing your plan throughout the year.