Overview Page - SKY Customer

Search for customers by ID, name, address, or city. Use the *Active Status* option to narrow search results to *Active* customers, *Inactive*, or both. To change customer information, edit the customer in Agvance. To select a different customer, type in the *Search* field at the top.

The primary pane on the *Overview* page displays a quick view of a variety of account information.

- **Customer Information** – This is a view-only listing of the *Customer Status*, *Customer ID*, *Address*, and *Salesperson*.
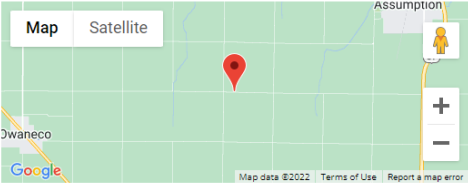

- **Contact Information** – The phone number(s) for the customer display. If using a mobile device, tap **Call** or **Text** to contact the customer.

- **Customer Map** – View the geocoded address for the customer. Google Maps functionality makes the map interactive.

- **Notes** – Notes set up in Agvance regarding the customer display.
- **Credit Status** – The *Credit Status* is established on the Customer *Profile* within Agvance.

Credit Status

Excellent

AVAILABLE CREDIT

$14,165.64

- **Balances** – Total balance information is broken down by category:

Balances

Regular	-$778.32
Prepay	$12,359.25
Unapplied Cash	$0.00
Budget Balance	$0.00
Budget Due	$0.00

View Unbilled Activity

- **Regular** – This displays open Invoice totals. Selecting the amount opens the *Invoices* window.
- **Prepay** – This displays open Booking totals. Selecting the amount will open the *Bookings* window.
- **Unapplied Cash** – This displays total unapplied cash for the account. Selecting the amount expands the line item showing the *Beginning Balance*, *Current Month Activity*, and the *Current Balance.*
- **Budget Balance** – This is the total Budget Balance for the account. Selecting the amount expands the line item showing the *Beginning Balance*, *Plus Monthly Budget Payments*, *Less Invoices for Delivery*, and the *Current Balance.*
- **Budget Due** – This shows total open Memo Invoices. Selecting the amount opens the *Memo Invoice* window.
- **Unbilled Activity** – This is the total dollars for Delivery or Blend Tickets not yet invoiced. Selecting the amount opens the *Activity* tab displaying any tickets that have not yet been invoiced.
- **Past Due Invoices** – Select a *Due on or Before* date to display past due Invoices. Choosing **View Invoices** opens a window listing the Invoices included in the selected criteria. Select the *Due on or Before* date option to filter the *Amt Past Due* information or to filter the Invoices listed when selecting **View Invoices.**

Past Due Invoices

Due on or Before
10/11/2022

MM/DD/YYYY

AMOUNT PAST DUE

-$800.82

View Included Invoices

- The *Selection* option on the *Search invoices* search bar is defaulted to *ON*. Invoices matching criteria from the *Past Due Invoices* card are selected but can be deselected by removing the checkmark per line item. Select the **Ellipsis** to *Select All* or *Deselect All*. Choosing **Pay Invoices** navigates to the *Add Payment* screen.

- **Sales by Month** – This displays overall sales by month for the past 12 months. Hover over the bar graph to see the total dollar amount of sales for that month.
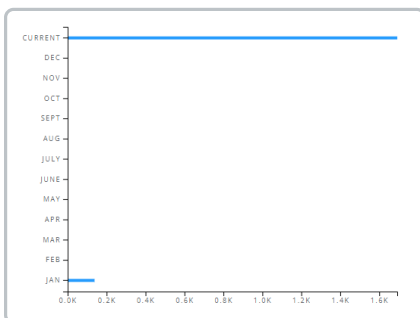
- **Calculate Payments Due** – Quickly determine a payment due for the account by setting date parameters and toggling options. The *Payment Date* will filter payments due by the selected date. *Due on or Before* dates filter by the selected date. Optionally toggle the *Include UAC* and *Maximize Discount* options on or off. The *Net Due, Disc Available, UAC Applied*, and *Payment Due* information displays based on selected criteria.

Calculate Payments Due

Payment Date	Due on or Before
10/12/2022	11/11/2022
MM/DD/YYYY	MM/DD/YYYY

Include UAC   Maximize Discounts ⓘ

Net Due	-$778.32
Discounts Available	- $0.00
UAC Applied	- $0.00
Payment Due	-$778.32

Make Payment

- Select **Make Payment** to navigate to the *Add Payment* screen. Invoices making up the *Net Due* amount on the card are automatically selected but can be changed.