

Attachments, Documents, and Statements - SKY Customer

Last Modified on 01/30/2024 4:00 pm CST

Attachments

Any documents that have been attached to the Customer *Profile* in Agvance display. Choose the **Ellipsis** icon to **View Attachment** or **Delete Attachment**.

View Attachments must be turned on in SKY Admin per user for this tab to be visible.

B

Barry Anderson

Overview

Activity

Attachments

Documents

Statements

File Name

AndersonBarry.docx

Category

Subcategory

Comments

Select the **Leaf** icon to **Send to Grower 360** or **Remove from Grower 360**. A blue leaf indicates the document is currently visible in Grower360.

Show Document in Grower360

Do you want this document to be available to users in Grower360?

Cancel

Send to Grower360

The file will display in Grower360 in the *Resources* area.

Overview

Resources

Bookings

Resources

Documents

File Name

AndersonBarry.docx

Date

Category

Subcategory

Comments

Attachments can be uploaded by selecting the **+ Add Attachment** button in the lower right. Drag and drop a file to the upload area or select **browse** to find the appropriate file. The *Category*, *Subcategory*, and *Comments* fields are all optional. Once the file is uploaded and any additional information is added, choose **Add Attachment**.

Note: The only supported files to share with a Grower that will open on the native app are PDF, DOC, XLS, TXT, and CSV. Other formats will display on the desktop in addition to these listed.

Add Attachment for Barry Anderson

Drag and drop here or [browse](#)

Document.docx (0.02 MB)

✓ Ready to upload

Category

0 / 30

Subcategory

0 / 30

Comments







0 / 100

Cancel

Add Attachment

Documents

The *Documents* tab in Customer provides the Grower Summary Report after it has been run in Agvance and sent to the Grower to assist Growers with any questions. Additional documents can also be added and optionally shown in Grower360.

Overview	Activity	Attachments	Documents	Statements
	File Name Grower Summary Report	Date 01/15/2024	Comments Grower Summary	 
	File Name Document.docx	Date 01/30/2024	Comments —	 

The Leaf icon, when filled in as seen below, indicates the the document is visible to Growers.

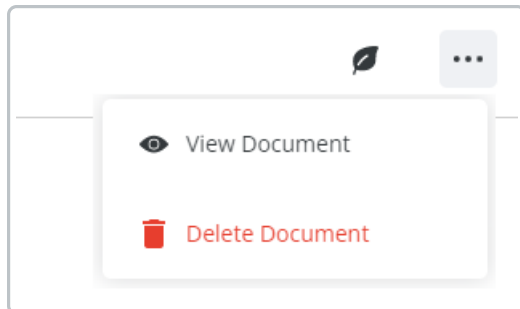
Note: When the Leaf icon is filled in with **black**, this means the document is ALWAYS visible to the Grower. The only way to keep the Grower from seeing this document is to delete the file. If filled in with **blue**, the document can optionally be shared with the Grower. Selecting the icon gives the option to show/hide the document in Grower360. Once hidden, the icon will be an outline rather than filled in to indicate it is no longer being displayed in Grower360.

Hide Document in Grower 360

Do you want this document to be unavailable to users in Grower 360?

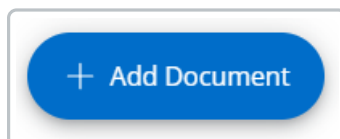
[Cancel](#) [Hide from Grower 360](#)

Selecting the **Ellipsis** gives the options to view the document in a separate tab or to remove the document from this area.

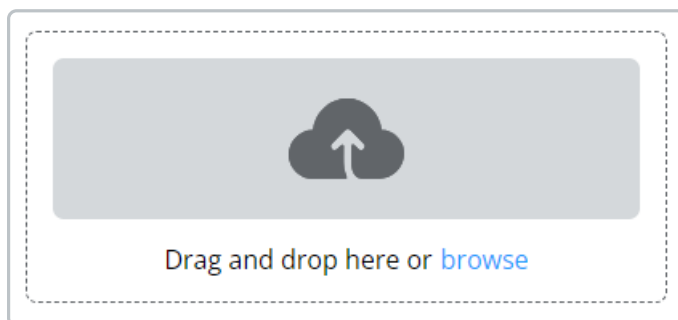


Adding Documents

Documents can be added by selecting the + icon in the bottom right.



1. Drag and drop the document in the designated area or select **browse** to locate the appropriate document.



2. Optionally enter a *Category*, *Subcategory*, and any *Comments*.

Category

0 / 30

Subcategory

0 / 30

Comments

0 / 100

3. Select **Add Document** to finish the process or **Cancel** to return to the *Documents* tab.
4. Upon adding and choosing to make the document visible, it will be available in Grower360.

Resources						
📁 Documents						
📄	File Name	Date	Category	Subcategory	Comments	...
	Grower Summary ...	01/15/2024	—	—	Grower Summary	
📄	File Name	Date	Category	Subcategory	Comments	...
	Document.docx	01/30/2024	—	—	—	

Statements

Invoice and Budget Statements are available on the *Statements* tab. Selecting the **Download** icon gives the option to view or download the statement as a PDF. Additionally, if using the *Send statements to Grower* option on the Combo and Budget Billing Statements, those will display here as well.

Overview





Activity

Attachments

Documents

Statements

Invoice Statements

	Statement Date Jan 31, 2024	
	Statement Date Dec 31, 2023	

Budget Statements

	Statement Date Dec 31, 2023	
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