

# Plans - Agvance SKY Customer

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Plans are used to generate nutrient recommendations, create Field Plans using specific products, rates, and prices, or to create a quick Sales Order by Customer or Field.

Plans can be started on the *Fields* tab in the *Fields, Tanks, ...* area of Agvance SKY Customer. For more information, see [Fields - Agvance SKY Customer](#).

## Overview

A listing of all Plans for the selected Customer is displayed. Search for Plans by *Plan Name, Plan ID, Zone, Date, Acres, or Crop*. Full or partial dates can be searched. Choose the **Ellipsis** on the search bar to change the *List View Mode* to *Field* or *Product*. These options are only available when *Selection* is *OFF*.

Plan Name	Plan ID	Zone	Date	Acres	Crop	Crop Chem	Share	G360 Visible	Status	Converted to
Spring Fertility Program	A	All	10/24/2023	66.2	Corn	--	\$5,290.52	No	Offered	Blend >
Preplant Chemical Program	B	All	10/24/2023	66.2	--	--	\$909.35	No	Offered	Booking >
Plan A	C	All	03/29/2024	97.98	--	--	\$651.78	No	Offered	--
Plan A	D	All	04/02/2024	97.98	Corn	--	\$7,389.12	No	Offered	--
spring fertilizer	E	All	08/01/2023	97.98	Corn	--	\$1,959.61	No	Offered	--

The *Converted to* column indicates if the Plan has been converted to a Blend or Booking. Select the *Converted to* label to see the Blend Tickets or Bookings converted from the Plan. Choosing the radio button for the row gives the option to **View Ticket**.

**Blend tickets converted from Plan :**

Ticket#	Ticket Date	User	Status	Comment
465	7/19/24	KB	Invoiced	Corn NH3

[Cancel](#) [View Ticket](#)

Bookings Plans **Blends** Deliveries Sales Orders Product Delivery Orders Work Orders

Search blend tickets

Viewing by Ticket

Ticket #	Field	Field Name	Blend Name	Ticket Date	Loaded Date	Crop	User	Status
465	East	Barrys East of Waterway	Corn NH3	07/19/2024	08/05/2024	Corn	KB	Invoiced

Use the **Filter** icon to narrow down the list of Plans.

The image shows a vertical stack of form sections for configuring a plan. Each section is titled and has an upward-pointing triangle icon to its right. The sections are:   
1. **General**: Contains a text input field labeled "Crop(s)".   
2. **Date Range**: Contains two date pickers, "Start Date" and "End Date", both with a calendar icon and the format "MM/DD/YYYY" below them.   
3. **Status**: Contains two toggle switches, "Offered" and "Approved".   
4. **Location**: Contains a text input field labeled "Location(s)".   
5. **Usage**: Contains two toggle switches, "Converted to" (with sub-toggles for "Booking" and "Blend").

Choosing the **Expand** icon shows and hides additional Plan information.

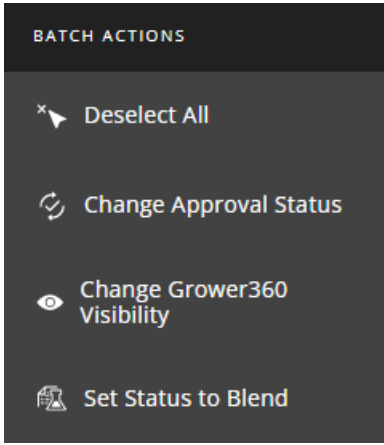
When using both Agvance SKY Customer and Agvance SKY Order, Blend Tickets can be generated from Plans by selecting the **Ellipsis** to the right of the Plan and choosing *Set Status to Blend*. When this option is selected, a credit check and permit check runs for all Customers on the Plan. Once the Blend Ticket is successfully created, it can be viewed from the *Blends* tab.

Other options under an individual Plan's **Ellipsis** include *Edit Plan*, *View Plan*, *View PDF*, or *Download PDF*. Choose *Delete* to permanently remove that Plan. Once deleted, the Plan cannot be recovered.

Selecting *Edit Plan* will navigate to that Plan in Agvance SKY Order. For more information on editing Plans, see [here](#).

Turn the *Selection* mode to *ON* in the search bar to turn on the capability to select single or multiple Plans. Mark the checkbox for specific Plans or choose **Select All** from the search bar **Ellipsis** to batch edit.

Once Plans are selected, choose the **Ellipsis** on the search bar again to *Change Approval Status*, *Change Grower 360 Visibility*, or *Set Status to Blend*.



Upon choosing *Set Status to Blend*, Agvance SKY Order opens to complete the process. The *Converting Plans* window below opens to show progress. Once this is finished, Agvance SKY Customer reopens.

## Converting Plans

### BA-01 | spring fertilizer

- ✔ Permit checking complete.
- ✔ Credit checking for Barry Anderson complete.
- ✔ Credit checking for Bob Cowgill complete.
- ✔ Blend ticket #262 for BA-01 Behind Fred Anderson's House created.

### BA-01 | Plan A

- ✔ Permit checking complete.
- ✔ Credit checking for Barry Anderson complete.
- ✔ Credit checking for Bob Cowgill complete.
- ✔ Blend ticket #263 for BA-01 Behind Fred Anderson's House created.

Close