

Sales Orders - SKY Order





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Overview

All Sales Orders are displayed including the *Ticket #, Date, Customer, Location, and Status*.

Select the **Ellipsis** icon for any Sales Order to *View PDF, Download PDF*, or choose *Delete* to permanently remove that Sales Order. Once deleted, the Sales Order cannot be recovered.

For Sales Order Contracts, a *Download Contract* option is available under the **Ellipsis**.

Blends	Plans	Sales Orders	Bookings	Deliveries	Work Orders
<input type="text" value="Search..."/>					
	Ticket # 48	Date 08/24/2023	Customer Barry Anderson	Location SSI Farm Services - IL	Status Offered
	Ticket # 47	Date 11/02/2022	Customer Barry Anderson	Location SSI Farm Services - IL	Status Offered
	Ticket # 46	Date 11/02/2022	Customer Samuel Zuzzle	Location SSI Farm Services - IL	Status Approved
	Ticket # 45	Date 11/02/2022	Customer Samuel Zuzzle	Location SSI Farm Services - IL	Status Offered

Add a Sales Order

Sales Orders can be added by selecting **+ Add Order** at the bottom right corner of the page then choosing **+ New as Sales Order**.

Step 1: Order Details

1. Enter the Location for the Sales Order.
2. The *Salesperson* defaults as the Salesperson selected on the User profile in SKY Admin and can be adjusted.
3. If needed, enter the *Start, End, and Expire* dates.
4. Choose the *Type* from the drop-down - *Pickup, Deliver, or Booking*.
5. Select the *Status* drop-down to choose *Offered, Approved, or Declined*. This will sync with Agvance.
6. Indicate the *Estimated Delivery Date*.
7. Optionally select *Make Order by Field* to default in the bill split arrangement set on the selected Field in the next step.
8. Select **Next Step** or choose the next step in the process list.

Order Details

Locations *

SSI Farm Services - IL

Salesperson

Blake Arnold

Start Date

End Date

Expiration Date

Order Options

Type

Pickup

Status

Offered

Estimated Delivery Date *

8/30/2023

☐ Make Order by Field

Cancel

Next Step

Step 2: Splits

1. Select the customer or customers for the Sales Order by using the *Search Customer* field.
2. Customers with active Ship Tos will have a *Ship To Address* drop-down. If one of the Ship Tos is marked as primary, it will default in. If the first customer on the split does not have any Ship To addresses, the drop-down will be disabled.
3. To remove a customer from the split, select the **Trash Can** icon.
4. The first customer listed on the split defaults to 100% of the split. Any subsequent customers selected default at 0% of the split. Use the **Up/Down Arrows** to adjust the split percentage or key in the preferred split arrangements in the *Split %* fields.
5. When satisfied with the split arrangement, select **Next Step** or the next step in the process.

Search Customers

Customer

Barry Anderson

Ship To Address

Barry Anderson

Split %

50.0000

Customer

Bob Cowgill

Split %

50.0000

Cancel

Previous Step

Next Step

Step 3: Products

1. To add product(s), begin typing a product name in the *Search* bar and select the product. Choose **Filters** to search for Products in a specific department.
 - The *Product ID*, *Department*, *Department ID*, and *Amount on Hand* information for each product is displayed.
2. To remove a product, select the **Trash Can** icon.
3. When all products have been added, select **Next Step** or choose the next step in the process.

Product	Product ID	Department	Department ID	Amount on Hand	
Product Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	100,000.00 Lbs	
Product Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	14,070.00 Lbs	

Cancel
Previous Step
Next Step

Step 4: Pricing

1. Choose a Payment Term by selecting the *Payment Term* field and choosing from the drop-down menu.

Payment Term

Net 15

n30 days

Booking

2/10 net 30

2. A *Sales Order Contract* can be selected from the drop-down. Doing so gives the ability to download the contract.

Sales Order Contract

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SalesOrderContract

3. Enter a quantity for each product and select the **Tab** key on the keyboard to move to the next detail for that product.
4. Select **Add Discounts** to search and add discounts for this Sales Order.


Discounts
Add Discounts

Discount Name	Quantity	Rate	Discount Type
Early Pay 10%	0.000	10.00	Percent

5. Select the appropriate pricing option for each customer. This allows customer on a split to be priced


independently.


- **Use Price Levels** – This option adds the default price in the *Price \$* field. If multiple Price Levels are available, they can be selected by choosing the **Down Arrow** in the *Price \$* field. If this option is selected and there are no Price Levels established, a *Price \$* must be manually entered in order to complete the order.
 - **Custom Price** – This changes the price to 0 and a custom price can be entered in the *Price \$* field.
6. When all product details have been added, select **Next Step** or choose the next step in the process.

 Product Name
Dap (18-46-00) ⓘ

Quantity / Lbs
2000.000

Hide Split




 Customer
Barry Anderson

Split
50.0000%

Product Share
1,000.000 Lbs

☒ Use Price Levels
☐ Custom Price

Price \$ / Tons
411.37 ▼

 Customer
Bob Cowgill

Split
50.0000%

Product Share
1,000.000 Lbs

☒ Use Price Levels
☐ Custom Price

Price \$ / Tons
411.37 ▼

 Product Name
Potash (0-0-60) ⓘ

Quantity / Lbs
550.000

Hide Split



 Customer
Barry Anderson

Split
50.0000%

Product Share
275.000 Lbs

☒ Use Price Levels
☐ Custom Price

Price \$ / Tons
375.00 ▼

 Customer
Bob Cowgill

Split
50.0000%

Product Share
275.000 Lbs

☒ Use Price Levels
☐ Custom Price

Price \$ / Tons
375.00 ▼

Cancel

Previous Step

Next Step

Step 5: Review Order

1. Review all details of the Sales Order, including *Location, Order Status, Salesperson, Split Information, Product Information, and Product Total*.
2. Make corrections by selecting **Previous Step** to navigate to the previous step or select the appropriate stage from the process list.
3. Optionally, add any *Notes* to include in the Agvance transaction as comments.
4. When satisfied with the Sales Order details, select **Save**.

Order Details

Location
SSI Farm Services - IL

Type
Pickup

Estimated Delivery Date
08/30/2023

Start Date
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Status
Offered


Salesperson
Blake Arnold

End Date
--

Payment Term
n30 days

Expiration Date
--

Splits


 Customer
Barry Anderson

Customer Total
\$257.25

 Customer
Bob Cowgill

Customer Total
\$257.25

Discounts



 Discount Name
Early Pay 10%

Quantity
0.000

Rate
10.00%



Total Discount
\$0.00

Products

 Product Name
Dap (18-46-00) 

Total Quantity
2,000.000 Lbs

Customer	Split	Price	Customer Total	Customer Quantity
Barry Anderson	50.0000%	\$411.37 / Tons	\$205.69	1,000.000 Lbs
Bob Cowgill	50.0000%	\$411.37 / Tons	\$205.69	1,000.000 Lbs

 Product Name
Potash (0-0-60) 

Total Quantity
550.000 Lbs

Customer	Split	Price	Customer Total	Customer Quantity
Barry Anderson	50.0000%	\$375.00 / Tons	\$51.56	275.000 Lbs
Bob Cowgill	50.0000%	\$375.00 / Tons	\$51.56	275.000 Lbs

Total

Product Total \$514.50

Notes

0 / 80

[Cancel](#)

[Previous Step](#)

[Save](#)