Sales Orders - SKY Order

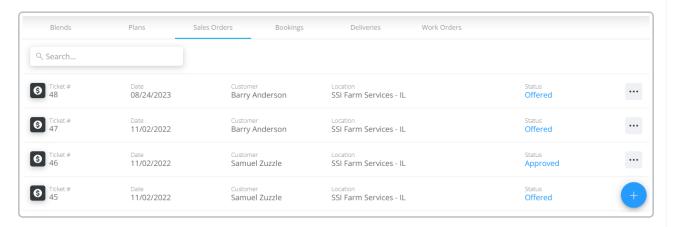
Last Modified on 12/06/2023 9:53 am CST

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.

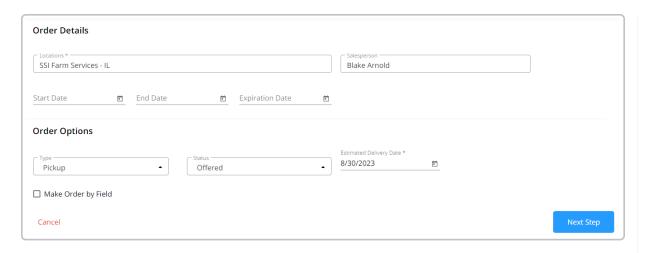


Add a Sales Order

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

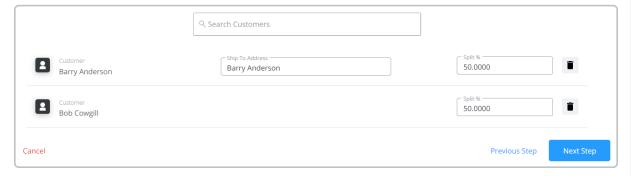
Step 1: Order Details

- 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.



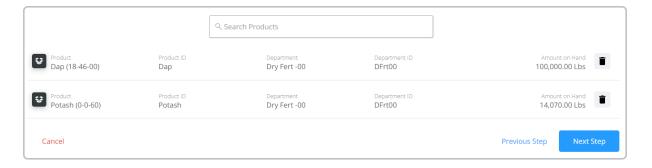
Step 2: Splits

- 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.



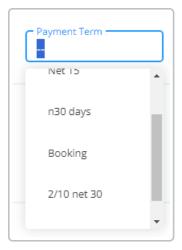
Step 3: Products

- 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.

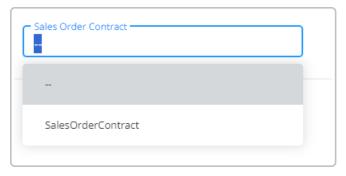


Step 4: Pricing

 $1. \ \ Choose \ a \ Payment \ Term \ by \ selecting \ the \textit{Payment Term} \ field \ and \ choosing \ from \ the \ drop-down \ menu.$



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



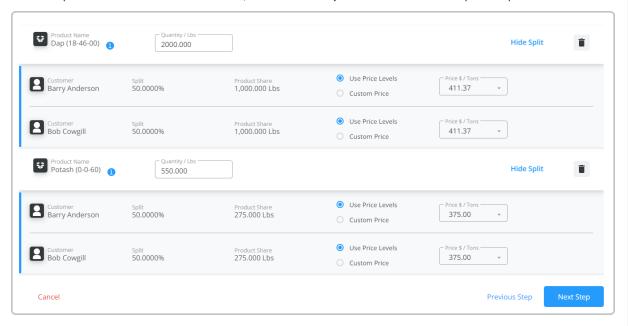
- 3. Enter a quantity for each product and select the **Tab** key on the keyboard to move to the next detail for that product.
- 4. Select Add Discounts to search and add discounts for this Sales Order.



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.



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.

