Sales Orders - Agvance SKY Order

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The playlist below covers viewing and entering Sales Orders in Agvance SKY Order. Separate videos are also available within each relevant section of this article. It is recommended to expand the videos to full screen to ensure all details are visible.

Viewing Sales Order List

Sales Orders are found in Agvance SKY Order under Accounting and display in an interactive grid. This grid operates much like an Excel spreadsheet. For more information on how the grid functions, see **Using Grids in Agvance SKY**.

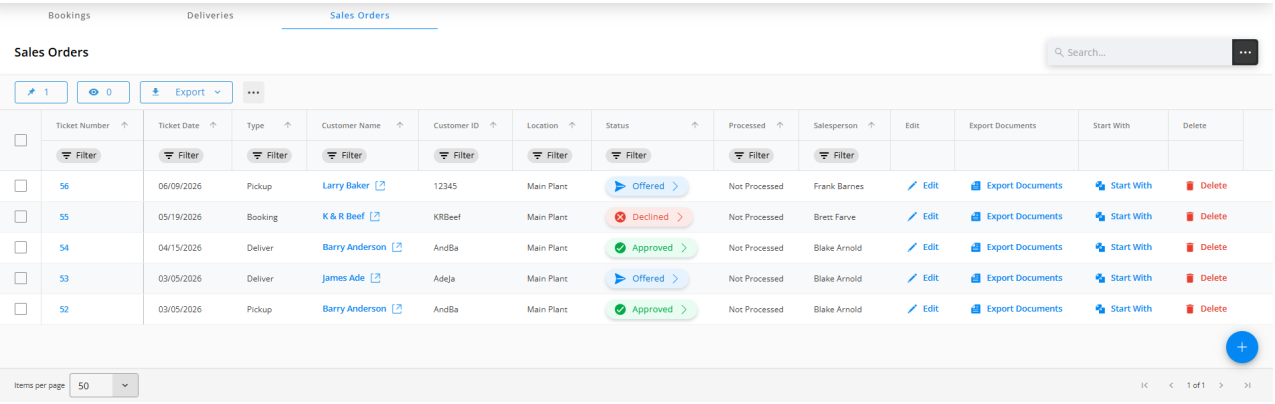
Note: Sales Orders must be enabled in **Agvance SKY Admin** before they can be viewed in Agvance SKY Order.

A **Delete** option is available, but, once a Sales Order is deleted, it cannot be recovered.

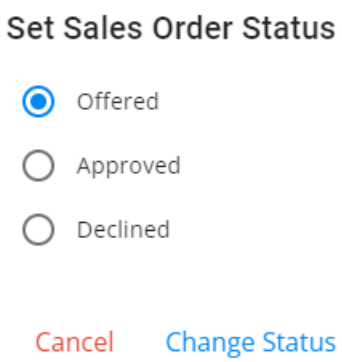
Note: If editing an existing Sales Order, the *Location* and *Customer or Field* information cannot be modified other than adding a *Ship To* if applicable.

For those with access to Agvance SKY Customer, selecting a**Customer** opens the corresponding *Overview* page.

Selecting a **Ticket Number** opens the Sales Order as view-only with a button to **Edit Order** in the lower right if edits need made.



The Sales Order *Status* can be changed by selecting the current status for that Sales Order then choosing from the options that display.



Additional filtering options are available under the **Filters** button next to the *User* drop-down.

- Status (*Offered*, *Approved*, *Declined*)
- Processed Status (*Processed*, *Not Processed*)
- Salesperson
- Sales Order Date Range
- Ticket Number Range
- Locations

Add a Sales Order

Sales Orders can be added by selecting **+ Add Sales Order**.

Use the navigation on the left to move to different sections of the Sales Order.

Location, Customer/Field

Location

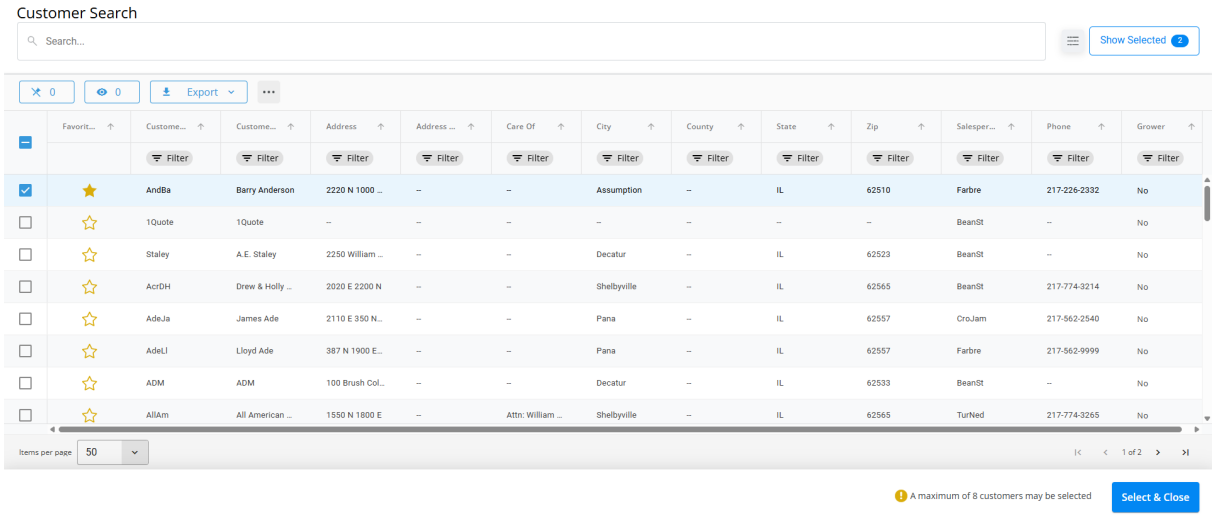
Select the *Location* for the Sales Order.



Customer/Field

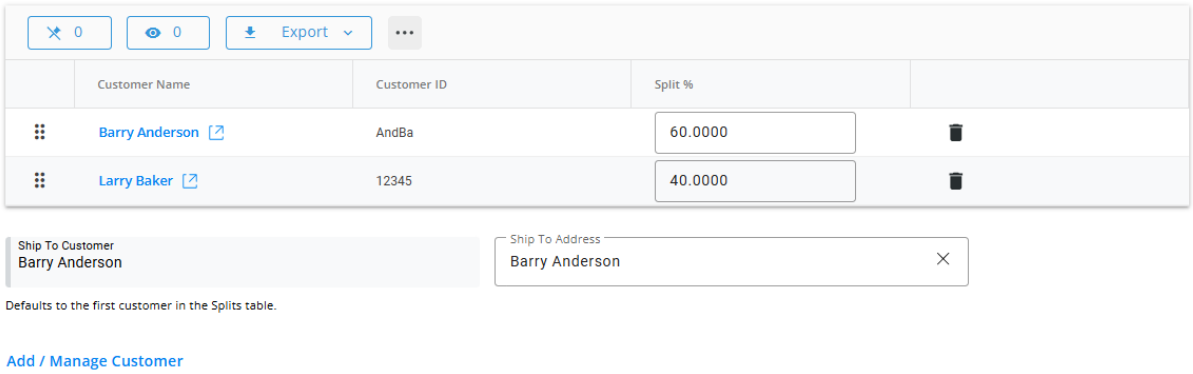
By Customer

1. Use the *Search* field to find the specific Customer or scroll through the list. A maximum of eight Customers may be added. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Customers.



2. The **Show Selected** button next to the *Search* bar is enabled after choosing the Customer(s). The number indicates how many Customers are currently checked. Selecting the button filters the grid to show only the selected Customers.
3. Once the Customers are selected, choose **Select & Close**.
4. If multiple Customers are selected, the *Split %* can be adjusted but must equal 100. Customers can be removed with the **Delete** icon.

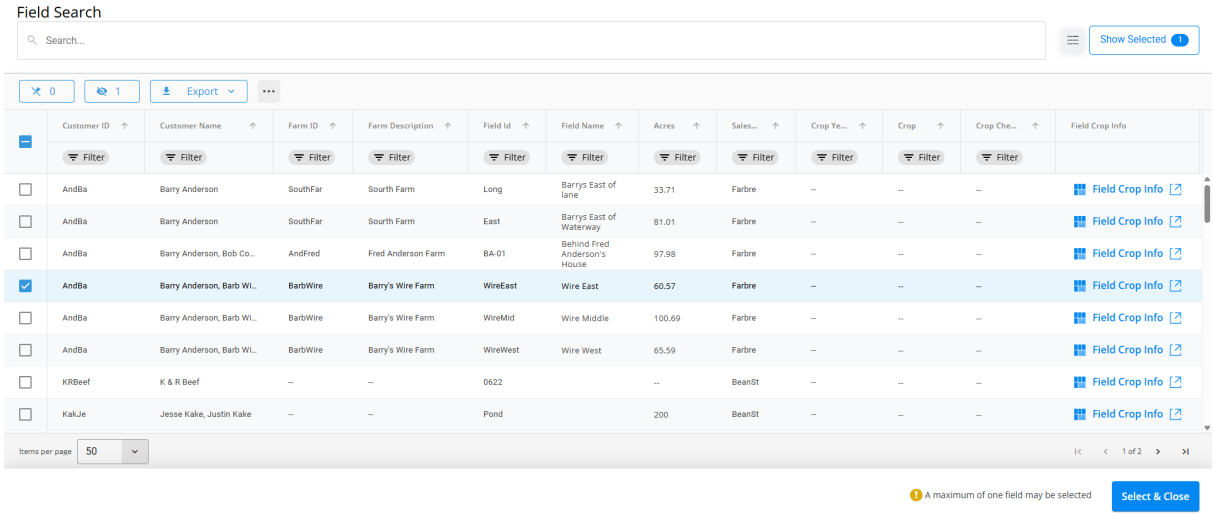
   Note: For those with access to Agvance SKY Customer, selecting a**Customer** opens the corresponding *Overview* page.



5. A *Ship To* can optionally be selected from the drop-down if applicable. The *Ship To Customer* defaults to the first Customer in the table. Rearrange Customers listed by selecting the grid of dots then dragging and dropping in the appropriate order.

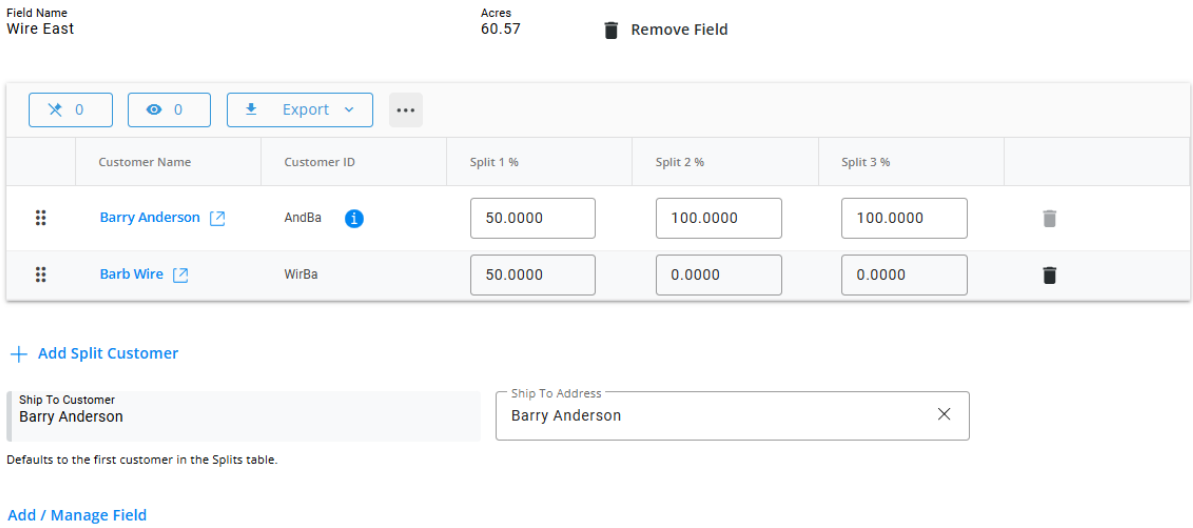
By Field

1. Use the *Search* field to find the specific Field or scroll through the list. A maximum of one Field may be added. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Fields.



2. The **Show Selected** button next to the *Search* bar is enabled after choosing the Field. The number indicates how many Fields are currently checked. Selecting the button filters the grid to show only the selected Fields.
3. Once the Field is selected, choose **Select & Close**.
4. If multiple Customers are part of the Field, the *Split %* can be adjusted but must equal 100. Customers can be removed with the **Delete** icon. The primary Customer cannot be removed.

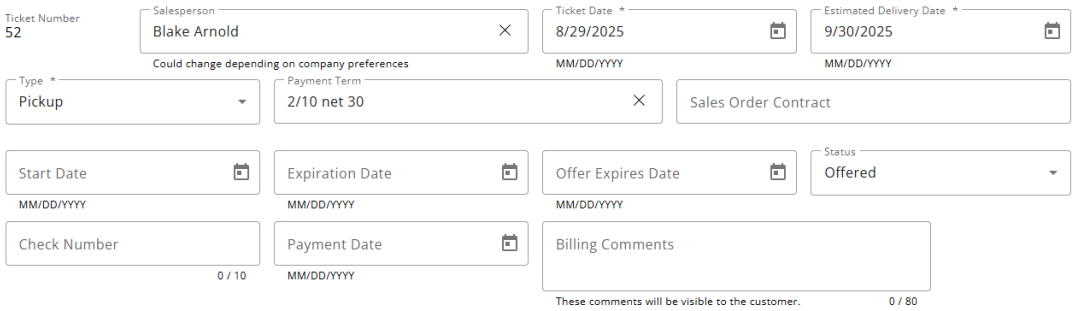
   Note: For those with access to Agvance SKY Customer, selecting a **Customer** opens the corresponding *Overview* page.



5. A *Ship To* can optionally be selected from the drop-down if applicable. The *Ship To Customer* defaults to the first Customer in the table. Rearrange Customers listed by selecting the grid of dots then dragging and dropping in the appropriate order.

Order Details

1. The *Ticket Number* will default once the Location has been selected.
2. The *Salesperson* defaults as the Salesperson selected on the User profile in Agvance SKY Admin but can be adjusted.
3. The *Ticket Date* automatically displays today's date but can be modified if needed.



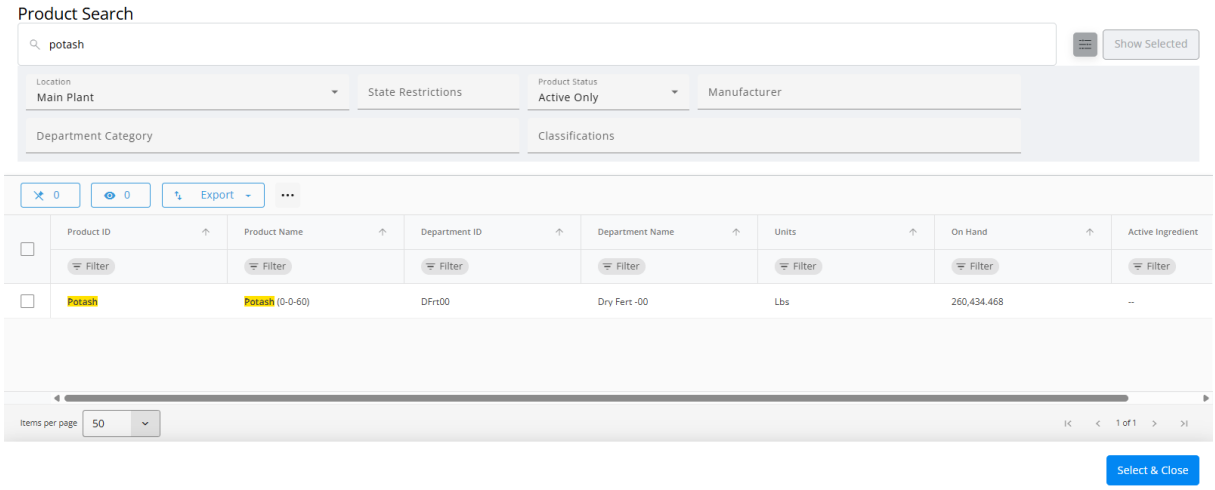
4. Indicate the *Estimated Delivery Date*.
5. Choose the *Type* from the drop-down - *Pickup*, *Deliver*, or *Booking*.
6. Optionally select a *Payment Term* and/or a *Sales Order Contract* for this Sales Order from the respective drop-downs.
7. The *Start*, *Expiration*, and *Offer Expires Dates* are optional entries but can be helpful if populated.
    - **Expiration Date** – This defaults from the Sales Allocation, if selected. If this order is imported to a Booking, this *Expiration Date* imports into the Booking *Expiration Date*.
    - **Offer Expires Date** – This is used on Sales Orders with an *Offered* status. Populating this date helps keep some preferences true at *Planning / Setup / Location Preferences* on the *Sales Order Prefs* tab. If the *Offer*

Expires date passes and the preference is set to *Disallow Approval of an Expired Sales Order*, the *Status* option of *Approved* will become disabled. However, expired Sales Orders can still be imported into a Booking if it was approved prior to that date. This date prints on the Sales Order.

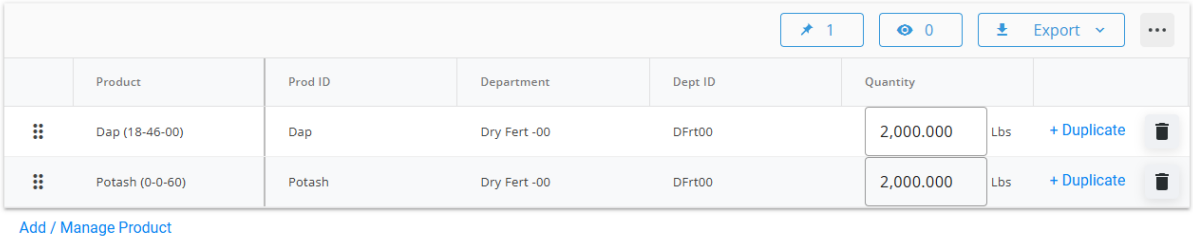
8. Select the *Status* drop-down to choose *Offered*, *Approved*, or *Declined*. This will sync with Agvance Windows.
9. If applicable, enter the *Check Number*. This is limited to 10 characters.
10. The *Payment Date* is an optional field.

Products

1. Select **+ Add Product**.
2. A **grid** of Products displays. Use the *Search* field to find the appropriate Product(s) or scroll through the list. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Products.



3. The **Show Selected** button next to the *Search* bar is enabled after selecting the Product(s). The number indicates how many Products are currently checked. Selecting the button filters the grid to show only the selected Products.
4. Once the Products are selected, choose **Select & Close**.
5. In the *Products* section of the Sales Order, indicate the *Quantity* for each Product.

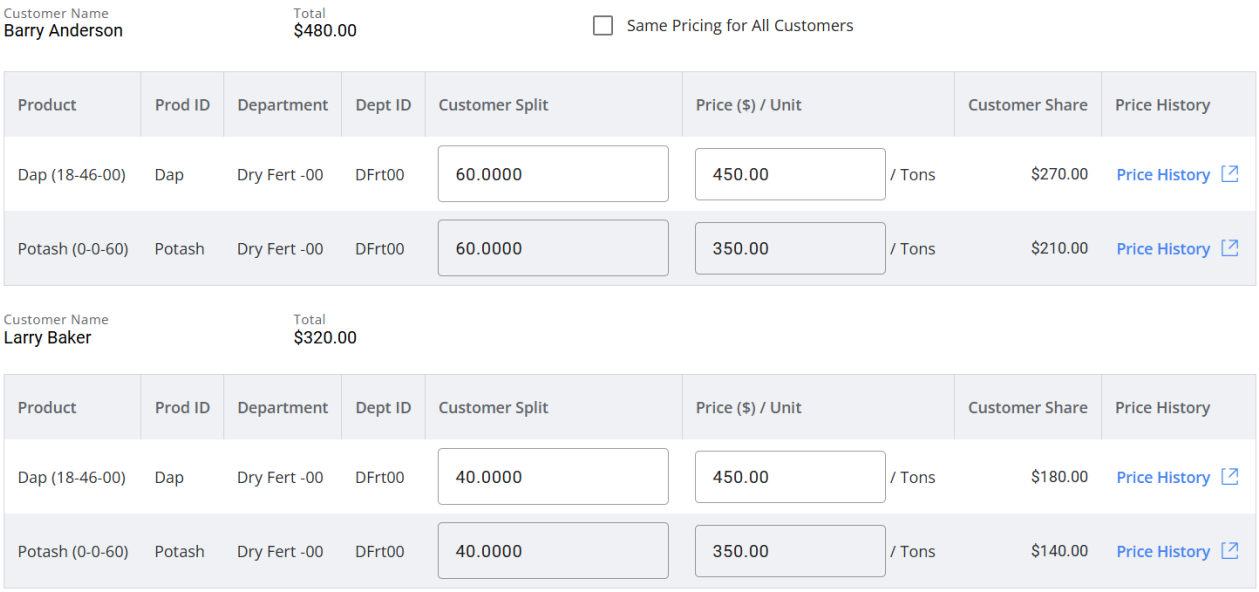


6. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.
7. Choose **+ Duplicate** to add another line of that Product.
8. The **Delete** icon can be selected to remove a Product line.

Pricing

In the *Pricing* section, indicate the *Price ($) / Unit* for each Product.

Note: Those with access to Agvance SKY Customer can select **Price History** to open Customer in a new tab and review the Product's previous Costs for that Customer.



Notes, Additional Info, & Discounts

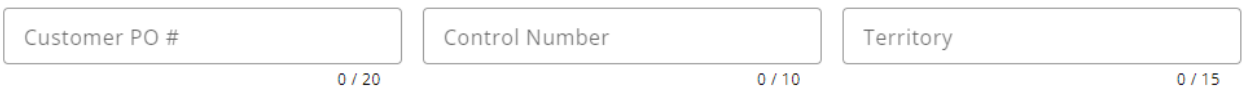
Notes

1. *Additional Comments* can be entered in the *Notes* section.

   Note: A maximum of 240 characters are allowed in this field.
2. After *Notes* are entered, **Create Order** can be selected but additional options are available on the *Additional Info* and *Discounts* tabs.

Additional Info

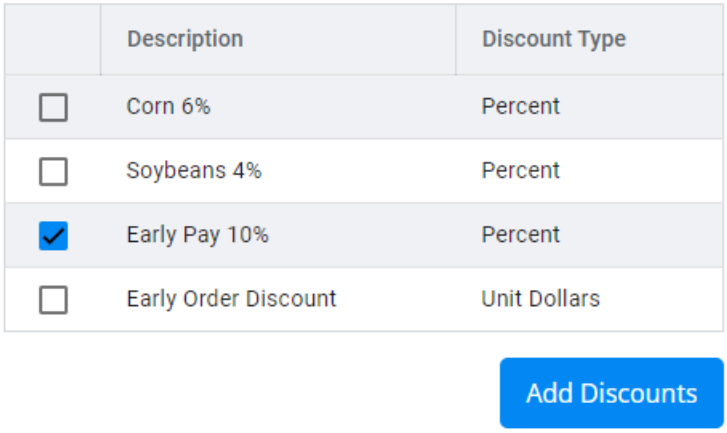
Optionally enter a *Customer PO #*, *Control Number*, and/or *Territory*.



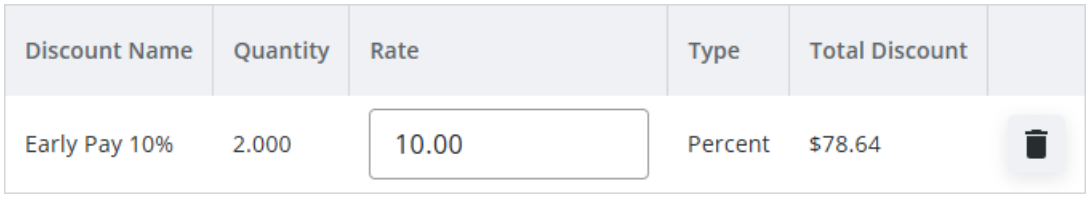
Discounts

Discounts already set up in Agvance Windows display on this tab. A maximum of five pricing discounts can be applied to a Sales Order.

1. Check any of the applicable discounts and select **Add Discounts**.



2. An *Active Discounts* section displays to indicate the *Rate* for the Discount. To remove the Discount, select the **Delete** icon.



3. Once all of this information is added, choose **Create Order**.