Sales Orders - SKY Order

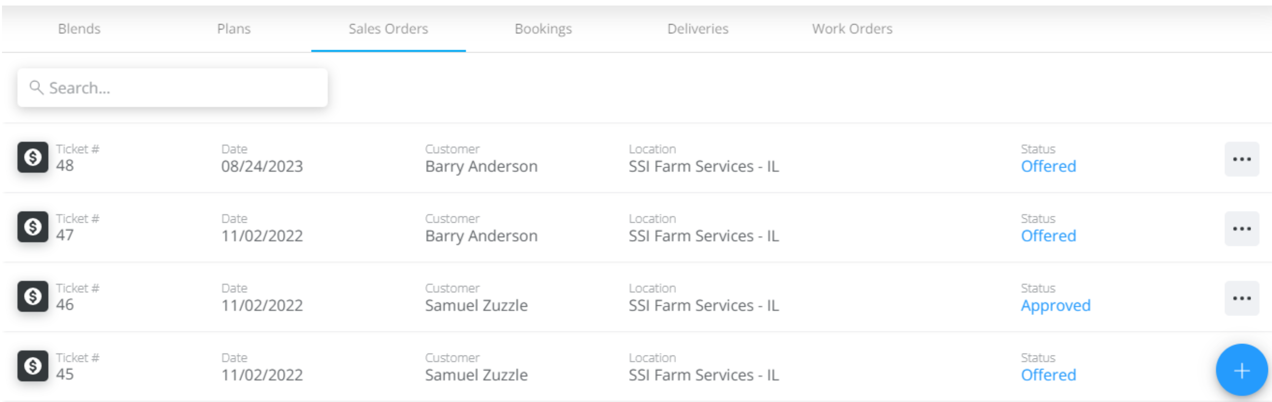
Last Modified on 06/24/2024 1:21 pm CDT

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

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

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.

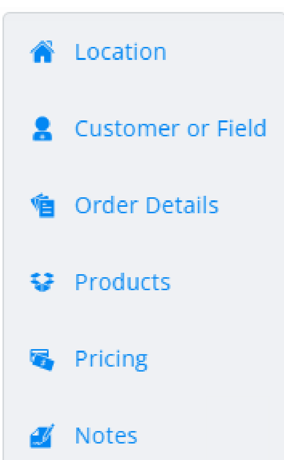
For Sales Order Contracts, a *Download Contract* option is available under the **Ellipsis**.



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**.

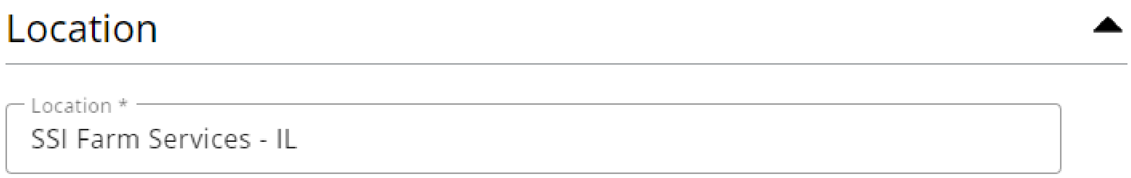
Use the navigation on the left to move to different sections of the Sales Order.



Sales Order

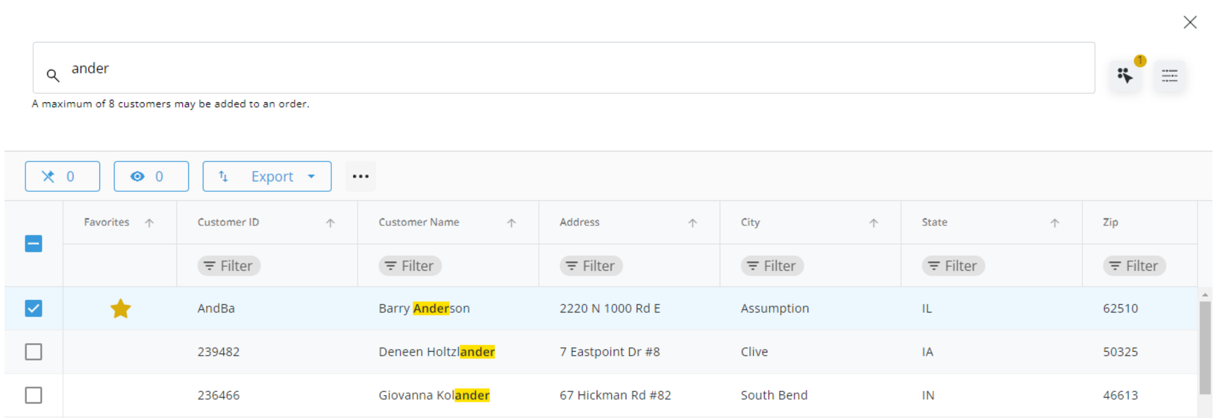
Location

1. Select the *Location* for the Sales Order.

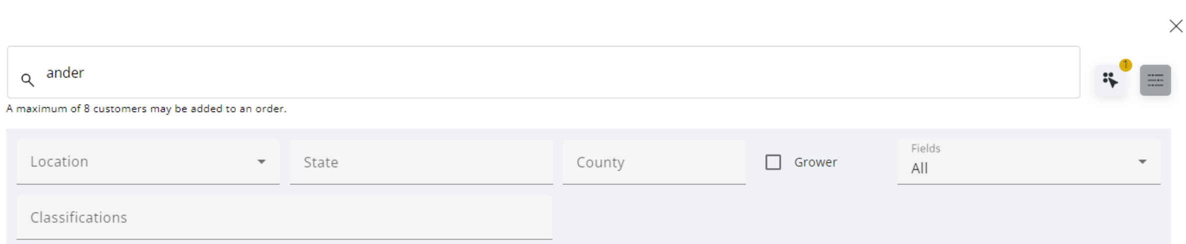


Customer or Field

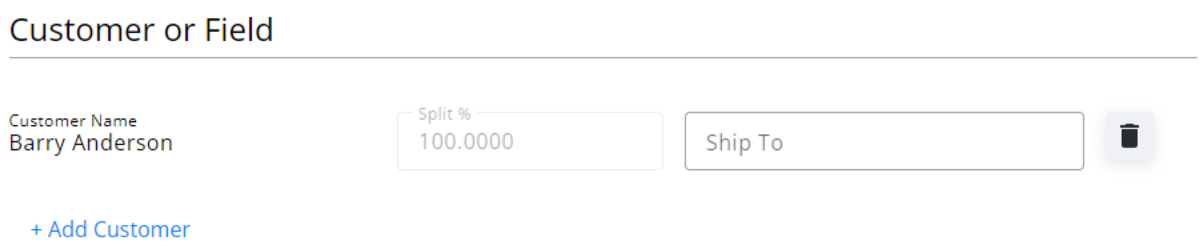
2. Under Customer or Field, choose **+ Add Customer** or **+ Add Field**. A grid of Customers (or Fields) displays. Use the *Search* field to find the specific Customer or scroll through the list. A maximum of eight Customers may be added to a Sales Order.



3. The button next to the *Search* bar is enabled after selecting the Customer(s). The number in the top right indicates how many Customers are currently checked. Selecting the button filters the grid to show only the selected Customers.
4. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Customers.

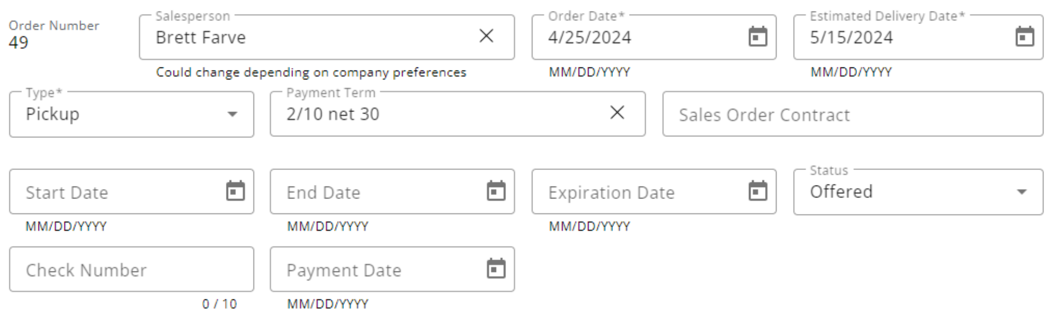


5. Once the Customers are selected, choose the **X** to close the grid.
6. A *Ship To* can optionally be added if applicable.



Order Details

7. The *Order Number* will default once the Location has been selected.
8. The *Salesperson* defaults as the Salesperson selected on the User profile in SKY Admin but can be adjusted.
9. The *Order Date* automatically displays today's date but can be modified if needed.

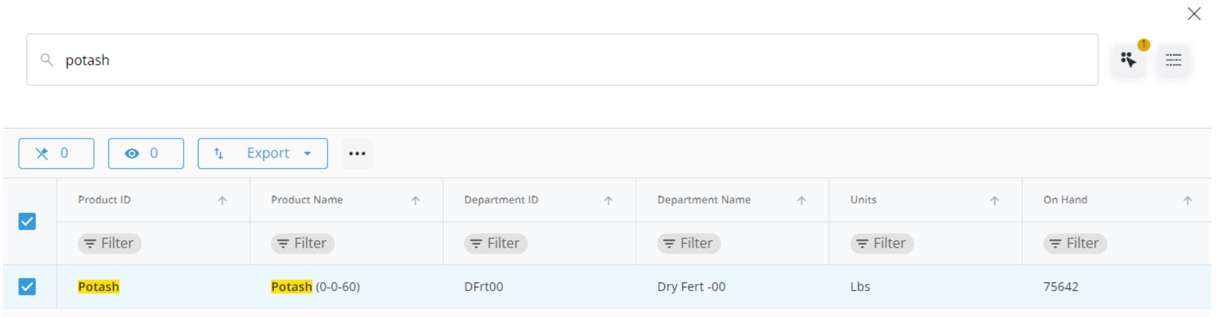


10. Indicate the *Estimated Delivery Date.*
11. Choose the *Type* from the drop-down - *Pickup*, *Deliver*, or *Booking*.
12. Optionally select a *Payment Term* and/or a *Sales Order Contract* for this Sales Order from the respective drop-downs.

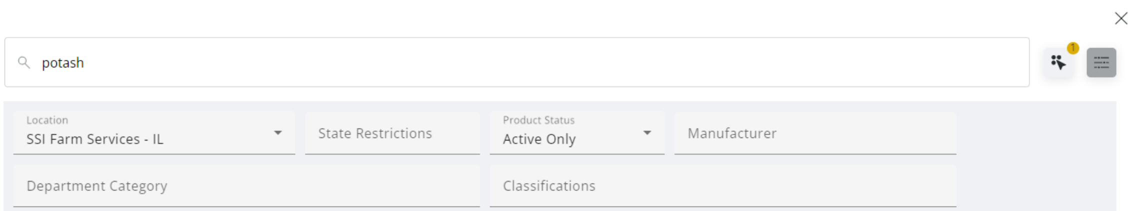
    Note: Items available under the *Sales Order Contract* drop-down are first set up at *Accounting / Setup / Preferences* on the *A/R* tab by selecting **Design Booking Contracts**.
13. The *Start*, *End*, and *Expiration Dates* are optional entries.
14. Select the *Status* drop-down to choose *Offered*, *Approved*, or *Declined*. This will sync with Windows Agvance.
15. If applicable, enter the *Check Number*. This is limited to 10 characters.
16. The *Payment Date* is an optional field.

Products

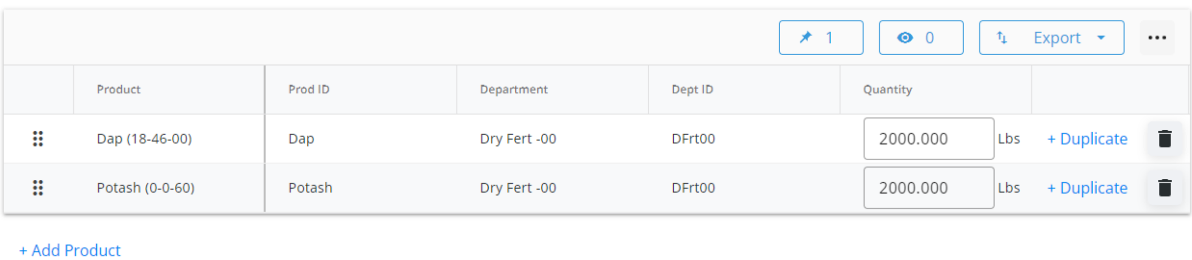
17. Select **+ Add Product**.
18. A grid of Products displays. Use the *Search* field to find the appropriate Product(s) or scroll through the list.



19. The button next to the *Search* bar is enabled after selecting the Product(s). The number in the top right indicates how many Products are currently checked. Selecting the button filters the grid to show only the selected Products.
20. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Products.



21. Once the Products are selected, choose the **X** to close the grid.
22. In the *Products* section of the Sales Order, indicate the *Quantity* for each Product.



23. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.
24. Choose **+ Duplicate** to add another line of that Product.
25. The **Trash Can** can be selected to remove a Product line.

Pricing

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

Customer Name
Barry Anderson

Total
$786.37

Product	Prod ID	Department	Dept ID	Customer Split	Price ($) / Unit	Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	100.0000	411.37 / Tons	$411.37
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	100.0000	375.00 / Tons	$375.00

Notes

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

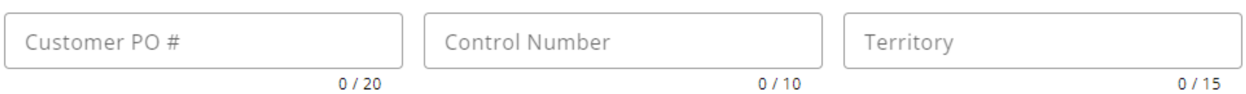
    Note: A maximum of 240 characters are allowed in this field.

28. After *Notes* are entered, **Create Order** can be selected but additional options are available on the *Additional Info* and *Discounts* tabs.

Additional Info and Discounts Tabs

Additional Info

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



Discounts

Discounts already set up in Agvance 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**.

	Description	Discount Type
☐	Corn 6%	Percent
☐	Soybeans 4%	Percent
☑	Early Pay 10%	Percent
☐	Early Order Discount	Unit Dollars

Add Discounts

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

Discount Name	Quantity	Rate	Type	Total Discount	
Early Pay 10%	0.000	10.00	Percent	$0.00	

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