Bookings - SKY Order

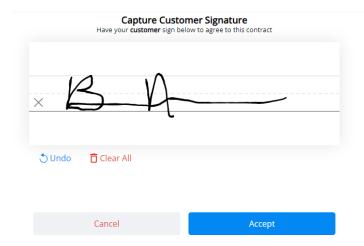
Last Modified on 05/30/2025 3:12 pm CDT

Use the Search field to search for Bookings by Ticket number, Date, Customer, or Location. Select the **Ellipsis** icon to View Booking, Edit Booking, View PDF, Download PDF, or Void.

Booking Contracts have Sign Contract and Download Contract as additional options under the Ellipsis.

Note: In Agvance, a *Contract Format* must be selected on the Booking before saving for these options to be available.

Selecting **Sign Contract** opens the contract to review. Select **Sign Contract** again to have the Customer sign the contract, then choose **Accept**.



Add/Edit a Booking

Bookings can be added by selecting the + Add Order icon at the bottom right corner of the page then choosing + New as Booking. To edit an existing Booking, choose the Ellipsis then select *Edit Booking*.

Note: If editing an existing Booking, the Location and Customer or Field information cannot be modified.

Booking

Location

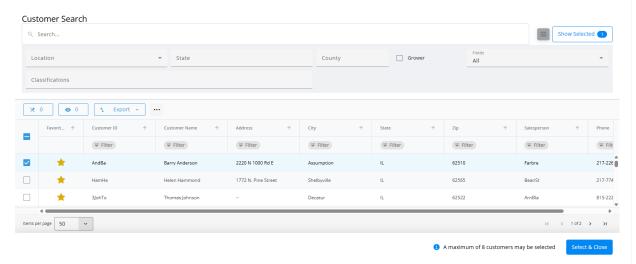
Select the Location for the Booking.

Location

SSI Farm Services - IL

Customer or Field

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 Booking. If adding by Field, only one Field can be selected. The Filters button to the far right of the
Search bar can be used to narrow down the list of Customers.



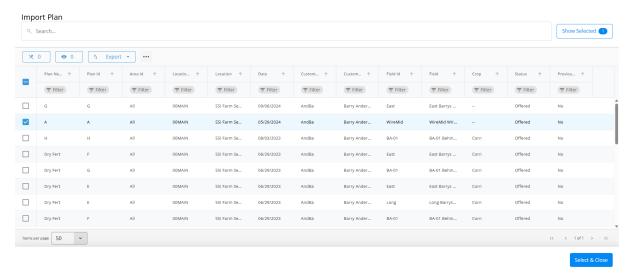
- 2. The **Show Selected** button next to the *Search* bar is enabled after choosing the Customer(s). The number indicates how many Customers are currently checked. Selecting the button filters the grid to show only the selected Customers.
- 3. Once the Customers are selected, choose Select & Close.
- 4. Optionally update the *Split* %. The **Delete** icon removes the Customer.



Order Details

1. Plans can optionally be imported into the Booking. Choose **Import Plan**, then search for Plans or scroll through the table to find and check the appropriate Plan(s). Splits, Payment Terms, Products, and Pricing will automatically be populated. Once Plans are checked, choose **Select & Close**.

Note: Searching for Plans will reset selected Plans.



2. Under *Import Options*, one Customer's share of a Plan can be imported by selecting *Import selected customer's* share only and indicating the Customer from the drop-down. Optionally choose *Do not combine like products*. Select **Import Plans**.

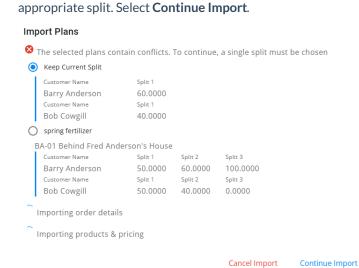
Import Options



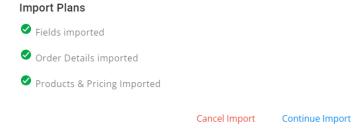
3. Upon choosing **Import Plans**, a progress window displays. Once the Plans are imported successfully, the message changes to indicate selected plans have been imported. If there is a split conflict, choose the

Cancel

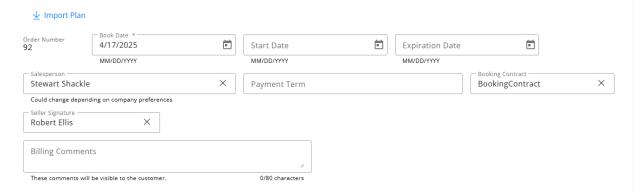
Import Plans



4. A confirmation will display to indicate the Plan was imported successfully. Choose **Continue Import** again.



5. The Order Number will default once the Location has been selected.



- 6. The Book Date defaults with today's date but can be modified if needed.
- 7. Optionally enter a Start and Expiration Date for this Booking.
- 8. The Salesperson defaults based on the setting selected in SKY Admin.
- 9. A *Payment Term* can optionally be applied to the Booking by selecting the appropriate Term from the drop-down.

Note: Payment Terms must first be set up at Hub / Setup / Payment Terms.

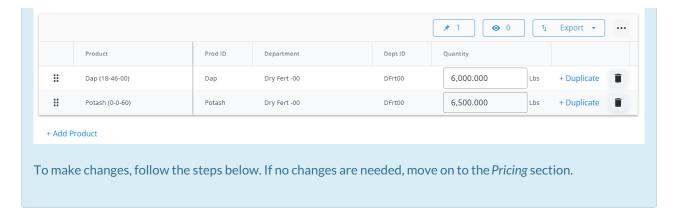
10. A Booking Contract can also optionally be selected from the drop-down.

Note: Booking Contracts must first be set up in Agvance by selecting **Design Booking Contracts** at *Accounting / Setup / Preferences* on the A/R tab.

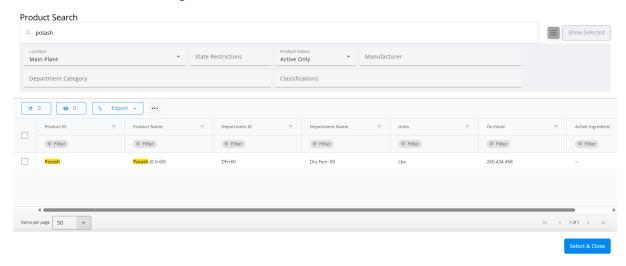
- 11. If the Seller Signature Only From Logged In User option is checked at Accounting / Setup / Preferences on the A/R tab, the Seller Signature will populate automatically with the name of the User currently logged in to SKY. If this preference is not enabled, a Seller Signature can be selected.
- 12. If applicable, *Billing Comments* can be entered and will be visible to the Customer.

Products

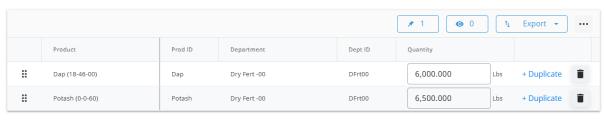
If a Plan was imported in the *Location* section, Products and their quantities will default from the Plan(s) selected. If this is the case, review the Products and amounts.



- 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, indicate the Quantity for each Product.



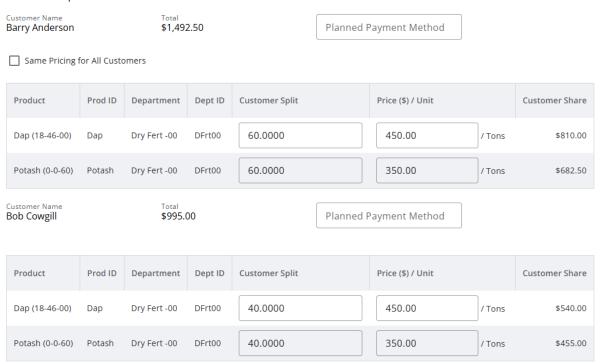
- + Add Product
- 6. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.
- 7. Choose + Duplicate to add another line of that Product.
- 8. The **Delete** icon can be selected to remove a Product line.

Pricing

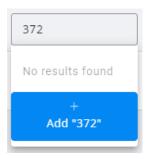
If a Plan was imported under the *Location* section, pricing information will default from the Plan(s) selected. If this is the case, review the *Price* (\$) / *Unit* per Product/Customer.

If this is the case, review the Products and amounts. To make changes, follow the steps below. If no changes are needed, move on to the *Notes* section.

1. The *Price* (\$) / *Unit* column can be changed as needed. A price can be entered or a Price Level can be chosen from the drop-down.



Note: If keying in a price, choose *Add* "\$" from the drop-down.



- 2. Checking the *Same Pricing for All Customers* option applies the pricing for the first Customer to all other Customers in the split.
- 3. The Planned Payment Method can be selected from the drop-down if these are set up at Accounting / Setup / A/R / Booking Payment Methods.

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 Tech License information is available on the *Additional Info* tab.

Additional Info

Tech Licenses

For Products that are a part of a Technology Group, the appropriate *Tech License* can be selected from the dropdown. If only one tech license is available, it will automatically be applied and the drop-down will be disabled.

Dap (18-46-00)

