

Bookings - SKY Order

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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**.

Capture Customer Signature
Have your **customer** sign below to agree to this contract

X BNA

Undo Clear All

Cancel 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.

Auto-numbering for Bookings must be turned on in Agvance to create a Booking in Order. The timing of turning this feature on impacts Agvance data. Please contact SSI for assistance.

Booking

Location

1. Select the *Location* for the Booking.
2. Import Plans into the Booking by choosing **Import Plan** to display the *Select Plans to Import* section. From here, search for Plans or scroll through the table to find and check the appropriate Plan(s). Importing Plans automatically populates the Splits, Payment Terms, Products, and Pricing.

Location *
SSI Farm Services - IL

Search plans...

Type search criteria and press enter to search

	Plan Name	Date	Customer	Field	Crop	Status	Previously Imported
<input checked="" type="checkbox"/>	Plan A	03/24/2021	Adam Carmex	Sample80	Alfalfa	Approved	--
<input type="checkbox"/>	Plan B	03/23/2021	Barry Anderson	East	Almonds	Approved	--
<input checked="" type="checkbox"/>	Plan A	02/09/2021	Barry Anderson	East	Corn	Approved	--

Note: Searching for Plans will reset selected Plans.

- 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 selected customer's share only

Do not combine like products

Customer

[Cancel Import](#) [Import Plans](#)

- 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 appropriate split or enter a custom split. Choose **Continue Import**.

Import Plans

The selected plans contain conflicts. To continue, a single split must be chosen

Plan A

East Barrys East of Waterway

Customer Name	Split 1	Split 2	Split 3
Barry Anderson	100.0000	100.0000	100.0000

Plan A

Sample80 D Sample's ground by pond

Customer Name	Split 1	Split 2	Split 3
Adam Carmex	100.0000	100.0000	100.0000

Custom Split

Customer Name	Split %
Barry Anderson	60.0000
Customer Name	Split %
Adam Carmex	40.0000

Importing order details

Importing products & pricing

[Cancel Import](#) [Continue Import](#)

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

Import Plans

- Fields imported
- Order Details imported
- Products & Pricing Imported

[Cancel Import](#) [Continue Import](#)

Customer or Field

1. 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.

Customer Search

Search: Show Selected 1

A maximum of 8 customers may be added to an order.

Location: State: County: Grower Fields:

Classifications:

<input checked="" type="checkbox"/>	Favorit...	Customer ID	Customer Name	Address	City	State	Zip	Salesperson	Phone
<input checked="" type="checkbox"/>	★	AndBa	Barry Anderson	2220 N 1000 Rd E	Assumption	IL	62510	Farbre	217-226-23

Items per page: 50 Save & Close

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 **Save & Close**.
4. Optionally update the *Split %* or select a *Planned Payment Method*. The **Trash Can** removes the Customer.

Note: Booking Payment Methods must first be set up in Agvance at *Setup / A/R / Booking*.

Customer Name Barry Anderson	Split % 60.0000	Planned Payment Method	
Customer Name Adam Carmex	Split % 40.0000	Planned Payment Method	

Order Details

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

Order Number 86

Book Date* 9/24/2024
MM/DD/YYYY

Start Date
MM/DD/YYYY

Expiration Date
MM/DD/YYYY

Salesperson Blake Arnold
Could change depending on company preferences

Payment Term

Booking Contract BookingContract

Seller Signature Robert Ellis

Billing Comments
These comments will be visible to the customer. 0/80 characters

- The *Book Date* defaults with the last used date but can be modified if needed.
- Optionally enter a *Start* and *Expiration Date* for this Booking.
- The *Salesperson* defaults as the Salesperson selected on the User profile in SKY Admin but can be adjusted.
- 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*.

- 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.

- 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.
- 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.

Product	Prod ID	Department	Dept ID	Quantity		
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	6000.000	Lbs	+ Duplicate
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	6500.000	Lbs	+ Duplicate

+ Add Product

To make changes, follow the steps below. If no changes are needed, move on to the *Pricing* section.

- Select **+ Add Product**.
- 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 **Save & Close**.
5. In the *Products* section, 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 **Trash Can** 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.

Customer Name
Barry Anderson

Total
\$1,471.72

Same Pricing for All Customers

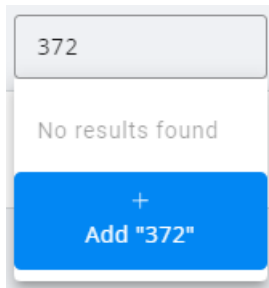
Product	Prod ID	Department	Dept ID	Customer Split	Price (\$) / Unit	Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	60.0000	411.37 / Tons	\$740.47
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	60.0000	375.00 / Tons	\$731.25

Customer Name
Adam Carmex

Total
\$981.14

Product	Prod ID	Department	Dept ID	Customer Split	Price (\$) / Unit	Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	40.0000	411.37 / Tons	\$493.64
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	40.0000	375.00 / Tons	\$487.50

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.

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 drop-down. If only one tech license is available, it will automatically be applied and the drop-down will be disabled.

Dap (18-46-00)

Tech License
987456876

✔ A tech license has been applied to this product