Bookings - SKY Order
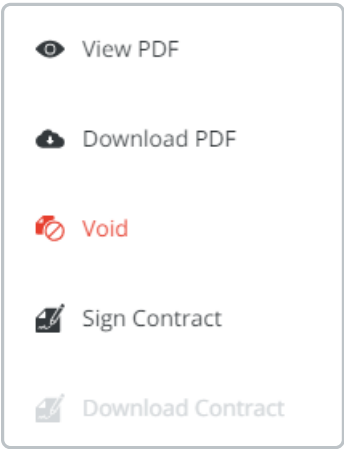
Overview

Use the *Search* field to search for Bookings by *Ticket* number, *Date*, *Customer*, or *Location*.

Select the **Ellipsis** icon to *View PDF*, *Download PDF*, or *Void*.
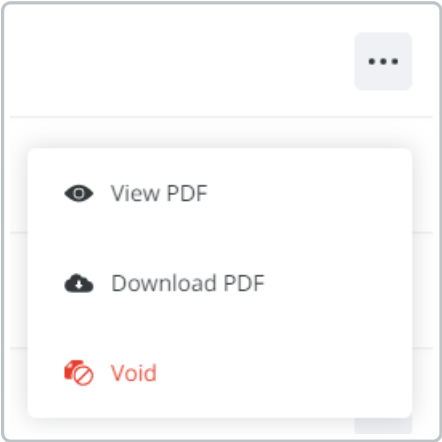
Booking Contracts have *Sign Contract* and *Download Contract* as additional options under the **Ellipsis**.

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

Undo   Clear All

Cancel   Accept

Add 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**.

Note: 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.

Step 1: Order Details

Order Details

Locations *
SSI Farm Services - IL

Salesperson
Blake Arnold

↓ Import Plan

Start Date

End Date

Order Options

☐ Make Order by Field

Cancel   Next Step

1. Select the Location for the Booking.

2. The *Salesperson* defaults as the Salesperson selected on the User profile in SKY Admin and can be adjusted.

3. 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.

Note: Searching for Plans will reset selected Plans.

4. 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 Selected Plans**. A message below **Import Selected Plans** indicates whether or not the selected Plans have been imported.

5. Upon selecting **Import Selected 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 and select **Continue**.

Selected Plans Contain Conflicting Splits

The selected plans contain conflicting splits. To continue, a single split arrangement must be chosen.

○ Plan B

Field: South20

Customer	Split 1	Split 2	Split 3
Larry Baker	60.000%	100.000%	100.000%
Barry Anderson	40.000%	0.000%	0.000%

○ spring fertilizer

Field: BA-01

Customer	Split 1	Split 2	Split 3
Barry Anderson	50.000%	60.000%	100.000%
Bob Cowgill	50.000%	40.000%	0.000%

○ Custom Split

Customer	
Larry Baker	Split %
Barry Anderson	Split %
Bob Cowgill	Split %

Cancel Import   Continue

6. Optionally indicate the *Start* and *End Date* for the Booking.

7. Select *Make Order by Field* to create the order by Field, which defaults in the bill split arrangement set on the Field selected in the next step.

   Note: If Plans were imported, this step is not available.

8. Select **Next Step** or choose the next step in the process to proceed.

Step 2: Splits

1. Select the customer(s) or field for the Booking by using the *Search Customer/Field* field. If making an order by Field, only one Field may be selected for the order.

Field	Acres					Hide Splits 🗑
Behind Fred Anderson's House	97.98					

Customer	Phone	Address	City	State
Barry Anderson	217-226-2332	2220 N 1000 Rd E	Assumption	IL
Bob Cowgill	217-774-2981	1880 N 1400 E	Shelbyville	IL

Note: If Plans were imported, the Field will already be populated.

2. To remove a customer or Field from the split, select the **Trash Can** icon.

3. 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.

4. When satisfied with the selected Field or split arrangement, select **Next Step** or choose the next step in the process to proceed.

Step 3: Products

1. To add a product, begin typing a product name in the *Search* bar and select the desired product(s). Choose **Filters** to search for Products in a specific department.

	Product	Product ID	Department	Department ID	Amount on Hand	
	Dicamba	1069876543	Chemicals -00	Chem00	8,025.00 Ozs	🗑
	Bagged Fert 19-19-19	19-19-19Bg	Bagged Fert - 00	Bag00	247.00 Bags	🗑

   Search Products

   Note: If Plans were imported, the Products from the Plan will already be populated. Additional Products can be added.

2. Continue adding products using the *Search Products* field.
3. To remove a product, select the **Trash Can** icon.
4. When all products have been added, select **Next Step** or choose the next step in the process to proceed.

Step 4: Pricing

1. Optionally select Payment Terms and/or a Booking Contract by choosing from the drop-downs. These must first be set up in Agvance.

   Payment Term
   n30 days

   Booking Contract
   Signatures

2. Review/edit any information in the *Splits* section.

   Splits

Customer	S1 (%)	Pest (%)	Spread (%)
Barry Anderson	50.0000	60.0000	100.0000
Bob Cowgill	50.0000	40.0000	0.0000

3. Enter a quantity for each product and press the **Tab** key on the keyboard to move to the next detail for that product.

Note: Products that are a part of a Technology Group will display the customer's license number if applicable. If the customer(s) on the order do not have a tech license and the *Booking Check Method* is set to *Warn Only* on the Tech Group at *Hub / Setup / Company Preferences / Product*, a message will display below the product stating *A tech license is recommended to continue the order with this product* but will allow the Booking to be saved. If set to *Restrict Sale*, a message will display below the product stating *A tech license is required to continue the order with this product* and will prevent moving on to the next step/saving the Booking.

4. Select the appropriate Pricing option for each customer. This allows customers on a split to be priced independently.

   - **Use Price Levels** – This adds the default price in the *Price $* field. If multiple Price Levels are available, they can be chosen by selecting 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.

5. When all products have been added, choose **Next Step** or select the next step in the process to proceed.

Step 5: Review Order

1. Review all details of the Booking including *Location, Order Status, Salesperson, Split Information, Product Information*, and *Product Total*.

2. Make corrections by choosing **Previous Step** to navigate to the previous step or select the appropriate stage from the process list.

3. For Booking Contracts, a Seller Signature can be applied by checking the *Assign Seller Signature* option. If the *Seller Signature Only From Logged In User* option is selected at *Accounting / Setup / Preferences* on the *A/R* tab, the user logged in will default in the drop-down and cannot be changed. If this option is NOT checked, the

Seller Signature can be selected from the drop-down.

Note: A signature must be set up in SKY. Additionally, a *Contract Format* must be selected when adding the Booking.

4. Add any *Notes* to include in the Agvance transaction as comments.

5. When satisfied with the Booking details, select **Save**.

Order Details

Location	Order Status	Salesperson
SSI Farm Services - IL	Booking	Blake Arnold

Splits

Field	Field Size
Behind Fred Anderson's House	97.98 Acres

Customer	Customer Total
Barry Anderson	$527.76

Customer	Customer Total
Bob Cowgill	$381.84

Pricing Terms

Start Date	End Date	Payment Term	Booking Contract
--	--	n30 days	Signatures

Products

Product Name				Total Quantity
Dicamba ⓘ				972.800 Ozs

Customer	Split	Price	Customer Total	Customer Quantity
Barry Anderson	50.0000%	$0.75 / Ozs	$364.80	486.400 Ozs
Bob Cowgill	50.0000%	$0.75 / Ozs	$364.80	486.400 Ozs

Product Name				Total Quantity
Bagged Fert 19-19-19 ⓘ				30.000 Bags

Customer	Split	Price	Customer Total	Customer Quantity
Barry Anderson	50.0000%	$6.00 / Bags	$90.00	15.000 Bags
Bob Cowgill	50.0000%	$6.00 / Bags	$90.00	15.000 Bags

Total

Product Total	$1,055.52

Seller Signature

☑ Assign Seller Signature

Seller Signature
Robert Ellis

Notes

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