Bookings - Agvance SKY Order

Last Modified on 09/28/2026 2:55 pm CDT

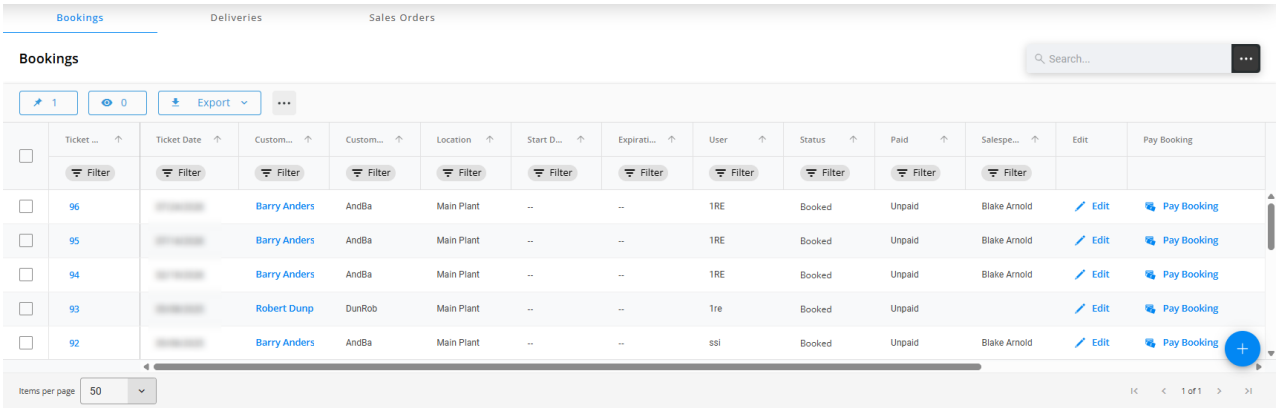
Bookings are found in Agvance SKY Order under *Accounting* and display in an interactive grid. This grid operates much like an Excel spreadsheet. For more information on how the grid functions, see **Using Grids in Agvance SKY**.

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

Additional filtering options (*Salesperson*, *Booking Date Range*, *Ticket Number Range*) are available under the **Filters** button.

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

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

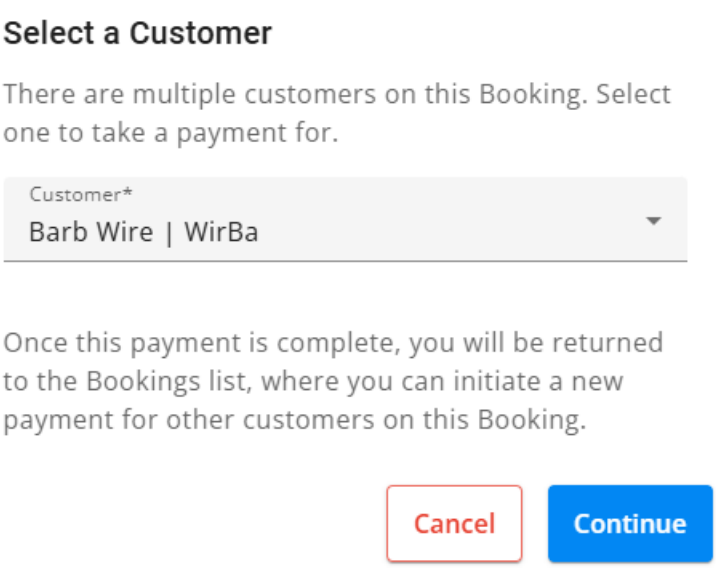


Grid Action Buttons

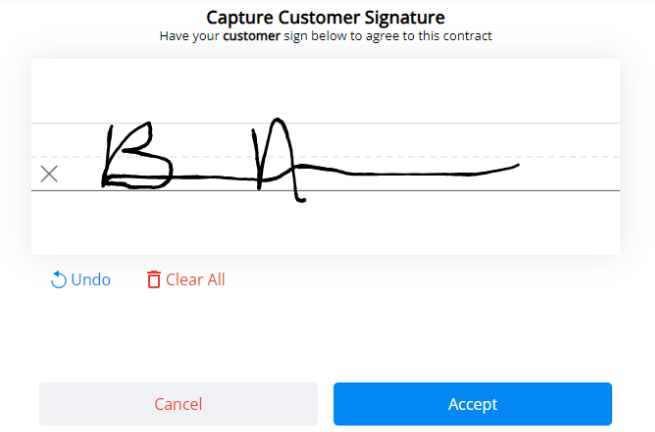
- **Edit** – This opens the Booking to make any needed changes.

  Note: If editing an existing Booking, the *Location* and *Customer or Field* information cannot be modified.
- **Pay Booking** – This action is available for those with permission to add Payments in Agvance SKY Customer on eligible Bookings.

  Note: If a Booking or a Customer on a Booking is invoiced, fully prepaid, down paid, or voided, it is not eligible for payment.
  - If there is one Customer on the Booking, Agvance SKY Customer will open in the current tab to make the Payment and will then return to the *Bookings* page in Agvance SKY Order. For multiple Customers, a drop-down displays with Customers eligible for payment on the Booking. Choose the appropriate Customer then **Continue** to make the Payment.



- **Export Documents** – This provides the option to export the Booking and/or Booking Contract as a PDF in a new tab. Ensure any pop-up blockers are disabled before exporting.
- **Sign Contract** – A *Contract Format* must be selected on the Booking before saving for this option to be available. Selecting **Sign Contract** opens the contract to review. Choose **Sign Contract** again to have the Customer sign the contract, then **Accept**.



- **Void** – Bookings that have not been voided or partially/fully invoiced can be voided.

Add Booking

Bookings can be added by selecting **+ Add** in the lower right corner of the page then choosing **+ Add Booking**.

Location/Customer or Field

Location

Select the *Location* for the Booking.

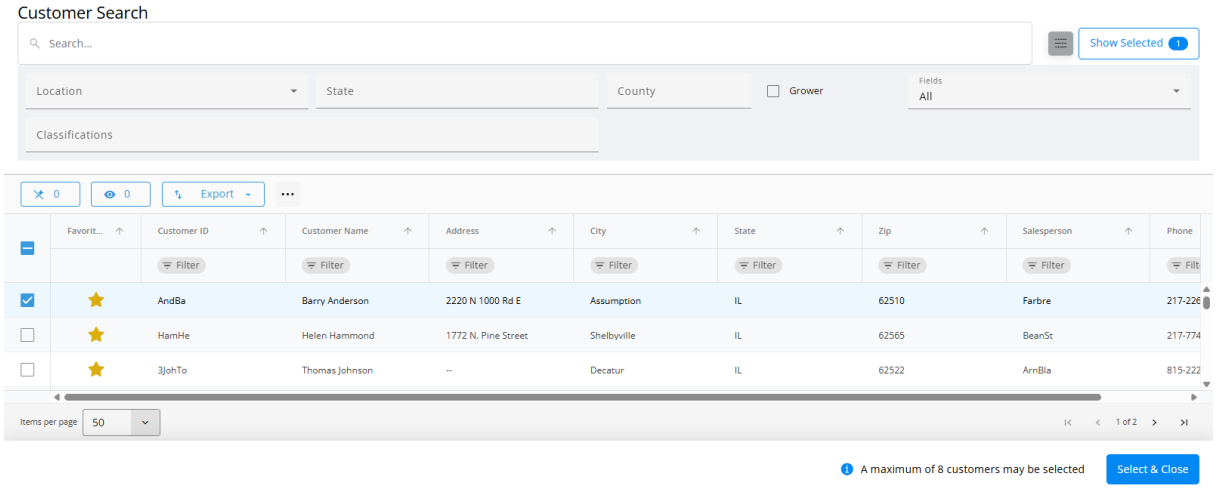


Customer or Field

Under *Customer or Field*, choose **+ Add Customer** or **+ Add Field**. A grid of Customers (or Fields) displays.

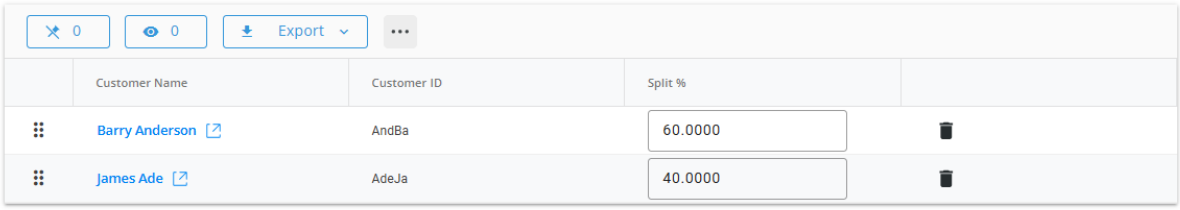
By Customer

1. Use the *Search* field to find the specific Customer or scroll through the list. A maximum of eight Customers may be added to a Booking. 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(s). Choosing **Add/Manage Customer** gives the ability to add or remove Customers from the Booking.

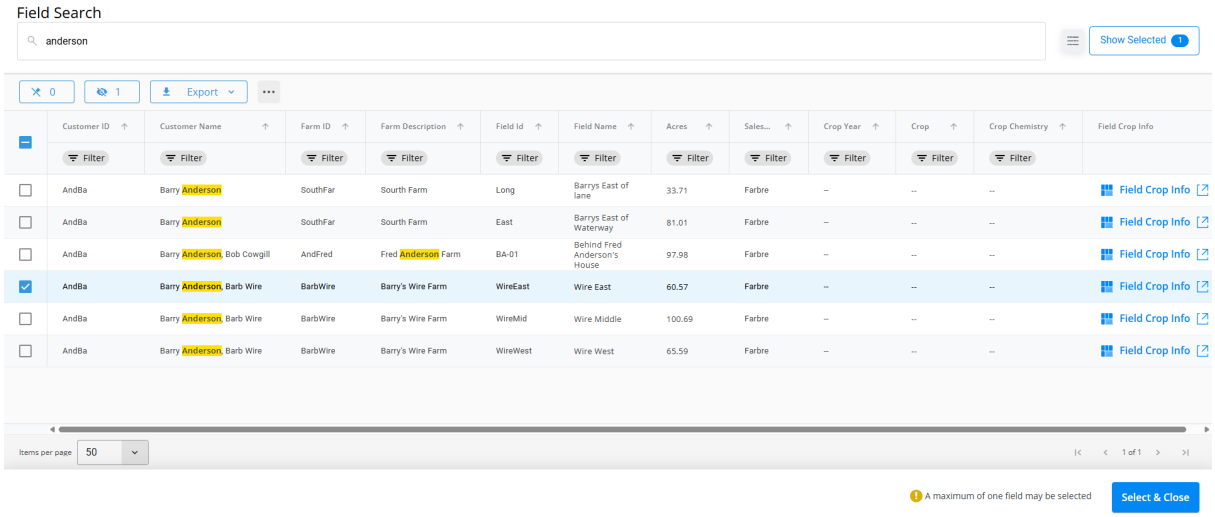
   Note: For those with access to Agvance SKY Customer, selecting a **Customer** opens the corresponding *Overview* page.



Add / Manage Customer

By Field

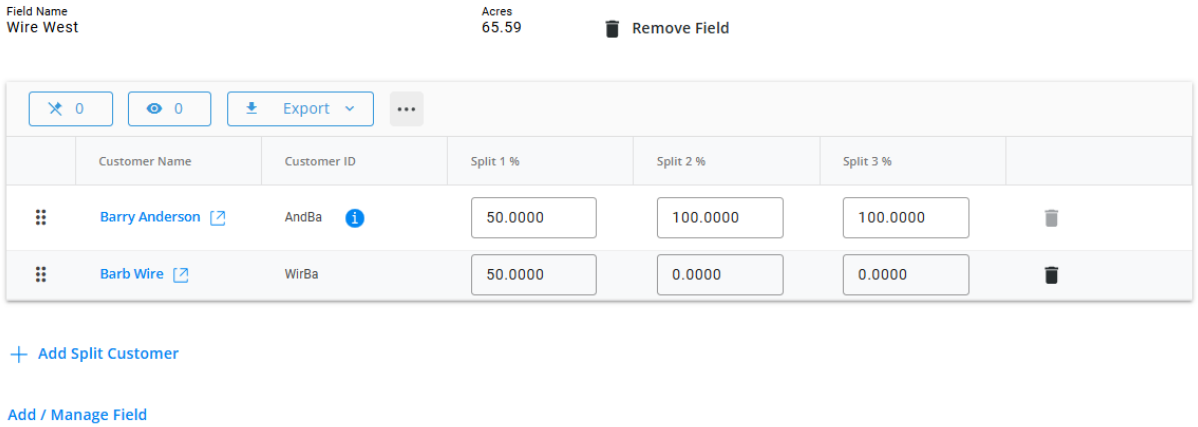
1. Use the *Search* field to find the specific Field or scroll through the list. One Field can be added to a Booking. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Fields.



2. The **Show Selected** button next to the *Search* bar is enabled after choosing the Field. The number indicates how many Customers are currently checked. Selecting the button filters the grid to show only the selected Field.
3. Once the Field is selected, choose **Select & Close**.

   Note: Choose **Remove Field** to remove the currently selected Field and choose another.
4. Optionally update the *Split %*. The **Delete** icon removes the Customer(s). The primary Customer cannot be removed.

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



5. Even though by Field, additional Customers can be added by choosing **+ Add Split Customer**.

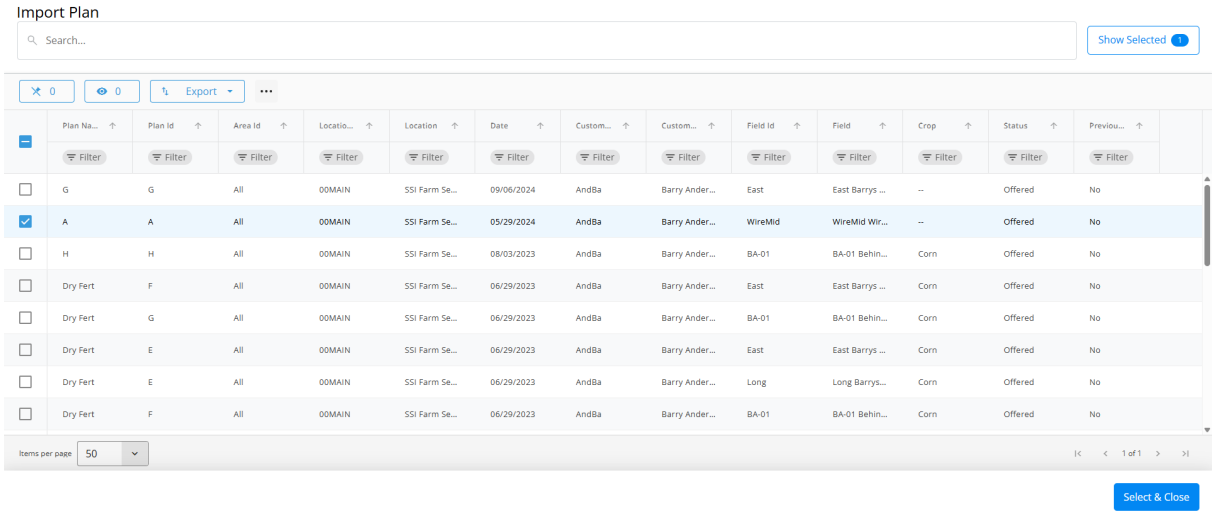
   Note: A maximum of eight Customers can be added to a Booking.

Order Details

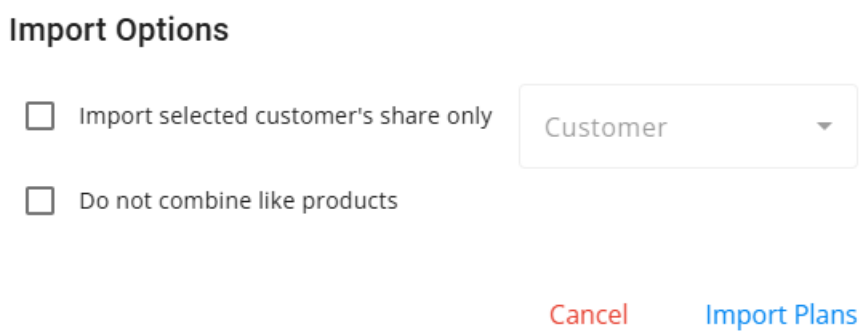
Import Plan

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**.

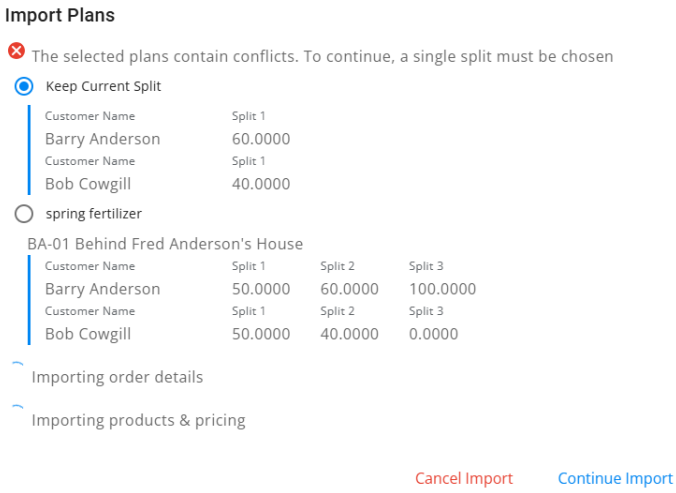
   Note: Searching for Plans will reset selected Plans.



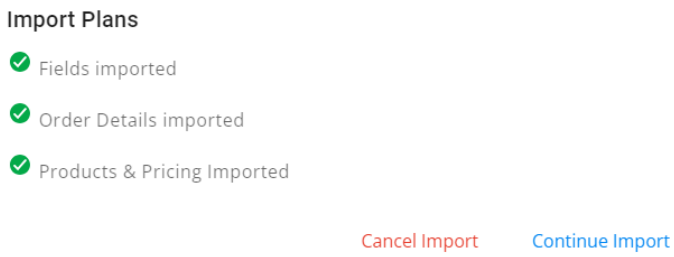
2. Under *Import Options*, one Customer's share of a Plan can be imported by selecting *Import selected customer's share only* and indicating the Customer from the drop-down. Optionally choose *Do not combine like products*. Select **Import Plans**.



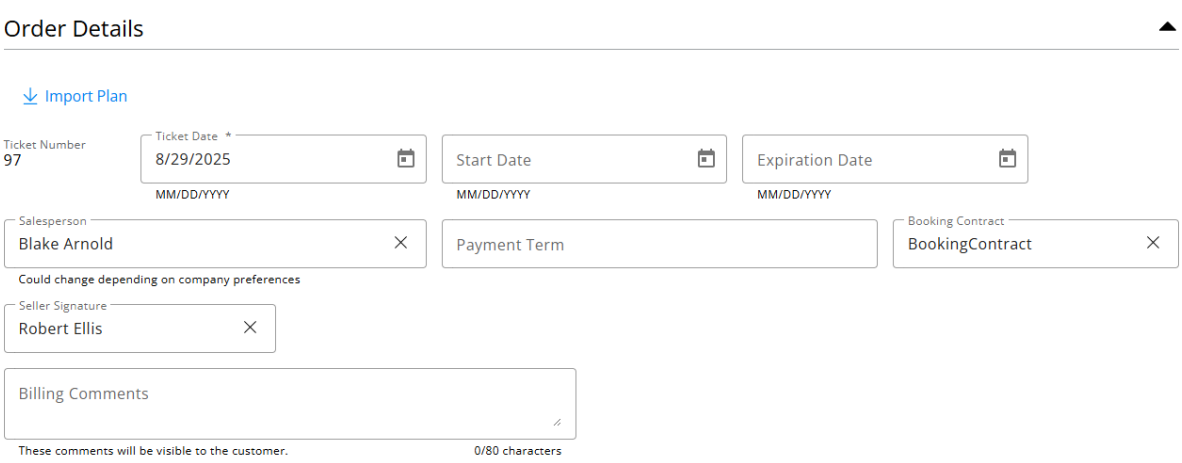
3. Upon choosing **Import Plans**, a progress window displays. Once the Plans are imported successfully, the message changes to indicate selected plans have been imported. If there is a split conflict, choose the appropriate split. Select **Continue Import**.



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



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



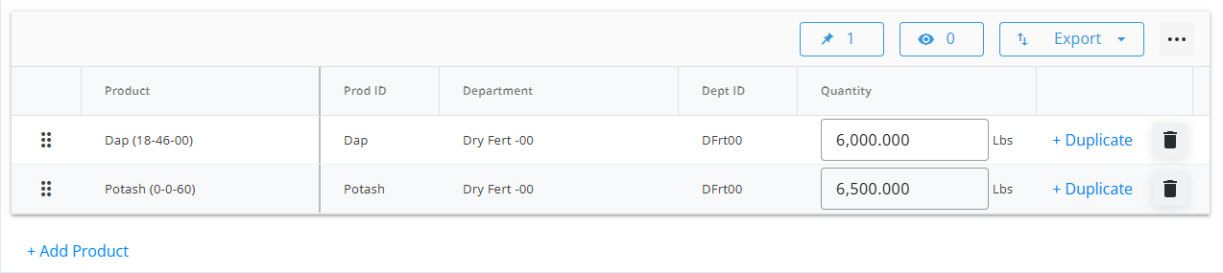
2. The *Ticket Date* defaults with today's date but can be modified if needed.
3. Optionally enter a *Start* and *Expiration Date* for this Booking.
4. The *Salesperson* defaults based on the setting selected in **Agvance SKY Admin**.
5. A *Payment Term* can optionally be applied to the Booking by selecting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

   Note: Payment Terms must first be set up at *Hub / Setup / Payment Terms*.
6. A *Booking Contract* can also optionally be selected from the drop-down.

   Note: Booking Contracts must first be set up in Agvance Windows by selecting **Design Booking Contracts** at *Accounting / Setup / Preferences* on the *A/R* tab.
7. 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 Agvance SKY. If this preference is not enabled, a Seller Signature can be selected.
8. If applicable, *Billing Comments* can be entered and will be visible to the Customer.

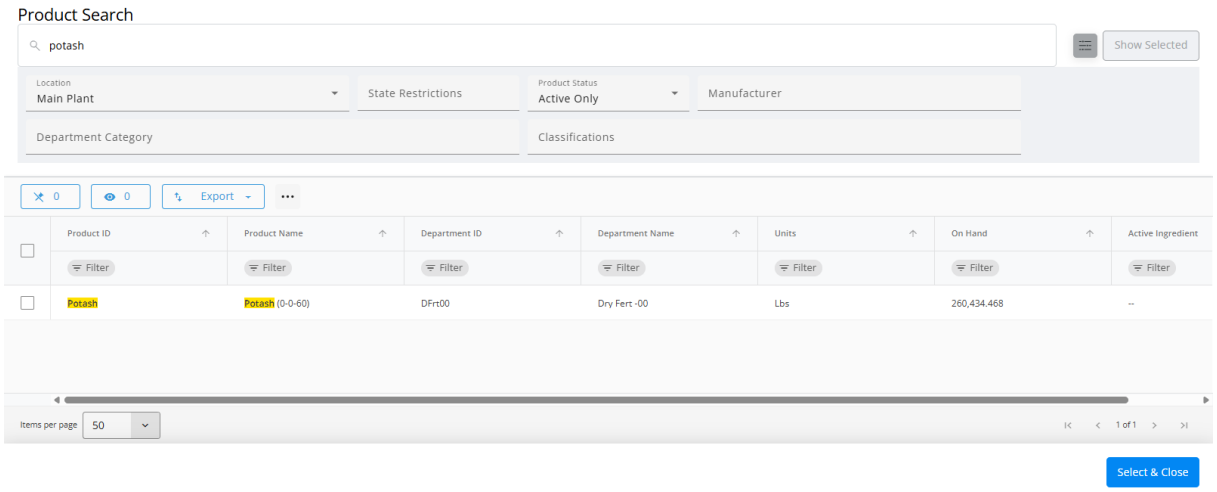
Products

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.

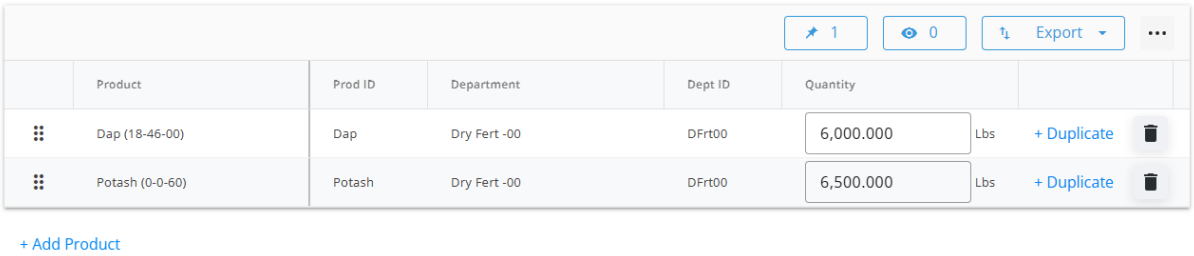


To make changes, follow the steps below. If no changes are needed, move on to the *Pricing* section.

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

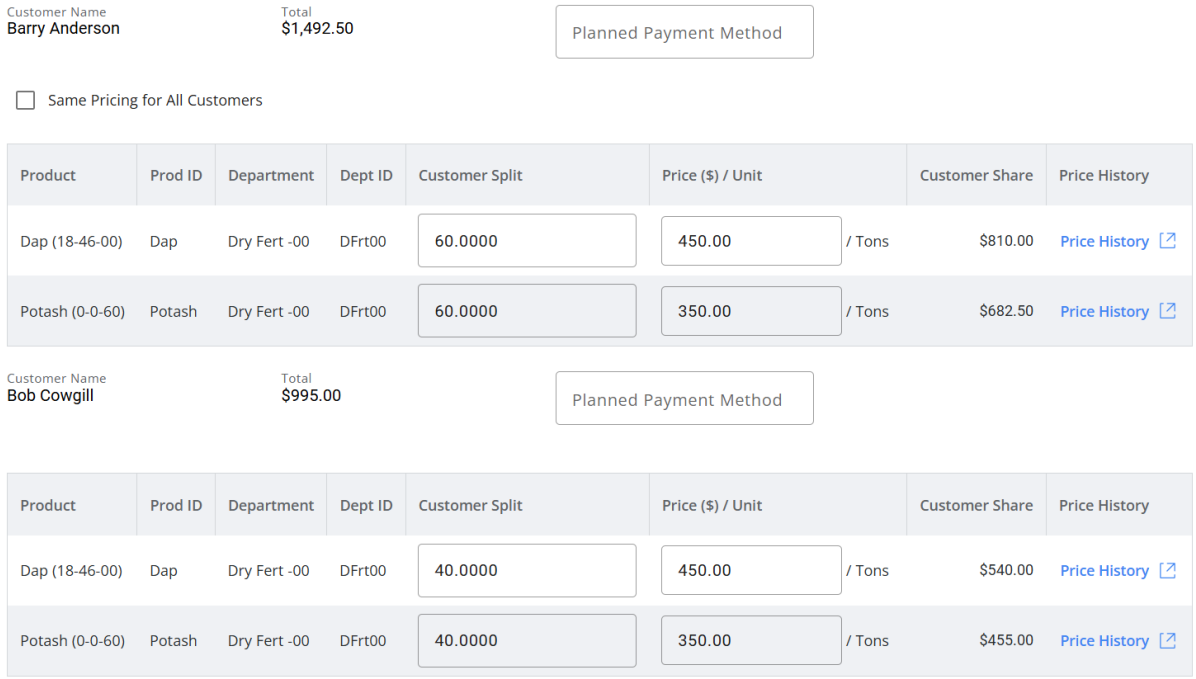
If a Plan was imported, pricing information will default from the Plan(s) selected. If this is the case, review the *Price ($) / Unit* per Product/Customer.

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

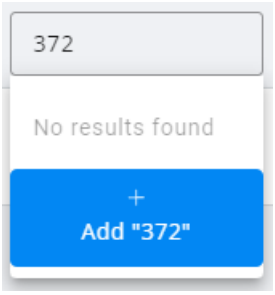
1. The *Price ($) / Unit* column can be changed as needed. A price can be entered or a Price Level can be chosen

from the drop-down.

Note: 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.

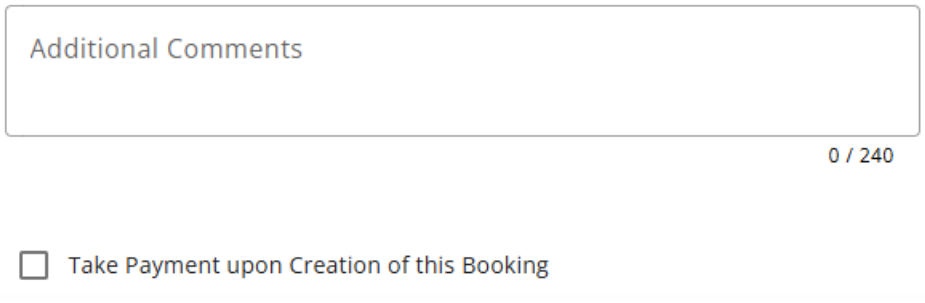


Note: If keying in a price, choose *Add "$"* from the drop-down.



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.
3. Checking *Take Payment upon Creation of this Booking* navigates to Agvance SKY Customer to complete the Payment there. If there is one Customer on the Booking, Agvance SKY Customer will open in the current tab to make the Payment and will then return to the *Bookings* page in Agvance SKY Order. For multiple Customers, a drop-down displays with Customers eligible for payment on the Booking. Choose the appropriate Customer then **Continue** to make the Payment. For more information on paying Bookings, see the *Grid Action Buttons* section at the top of the article.

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.

