Deliveries - Agvance SKY Order

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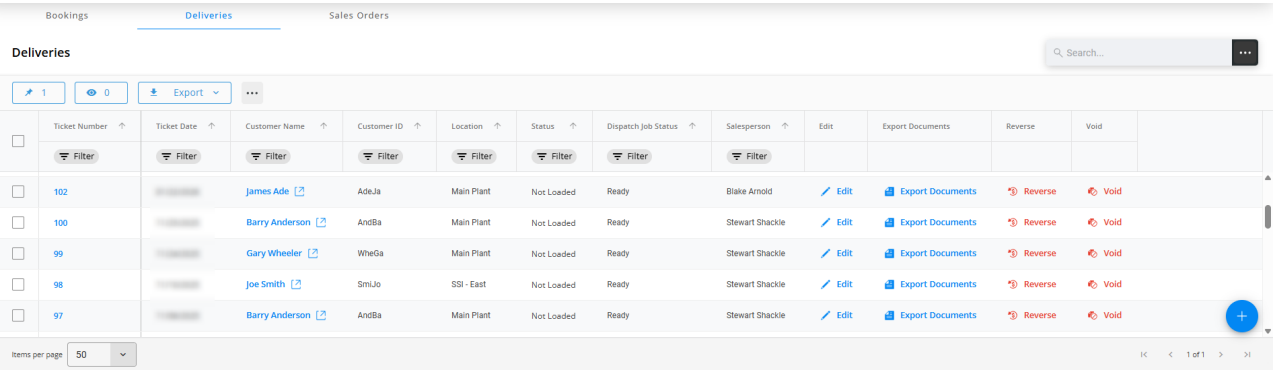
The playlist below covers viewing and entering Deliveries in Agvance SKY Order. Separate videos are also available within each relevant section of this article. It is recommended to expand the videos to full screen to ensure all details are visible.

Viewing Delivery List

Deliveries 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**.

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

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



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

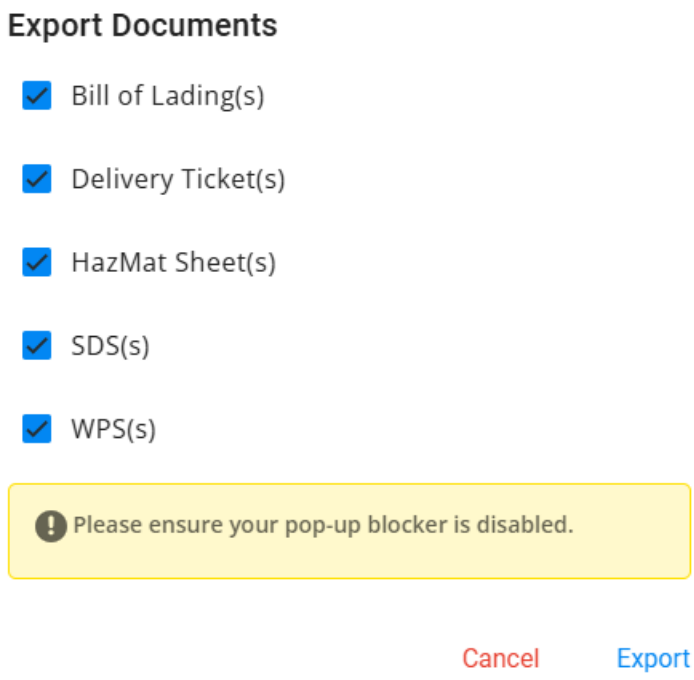
Additional filtering options are available under the **Filters** button next to the *User* drop-down.

- Status (*Not Loaded*, *Loaded*)
- Dispatch Job Status (*On Hold*, *Ready*, *In Process*, *Completed*)
- Salesperson
- Delivery Order Date Range
- Ticket Number Range

An option is available under the **Ellipsis** on the *Search* bar to *Export Documents*. Check the desired Delivery(ies), then choose this option to open the *Export Documents* window. From there, choose the desired document types then **Export**.

Note: The *SDS(s)* and *WPS(s)* options are available if Agrian is turned on in the database.

> Be sure any pop-up blockers are disabled.



Add a Delivery

Delivery Tickets can be added by selecting **+ Add Order** at the bottom right corner of the page then choosing **+ New as Delivery**.

Note: Auto-numbering for Deliveries must be turned on in Agvance Windows to create a Delivery in Order. The

timing of turning on this feature impacts Agvance data. Please contact SSI for assistance.

Use the navigation on the left to move to different sections of the Delivery.

Location, Customer/Field

Location

Select the *Location* associated with the Delivery.

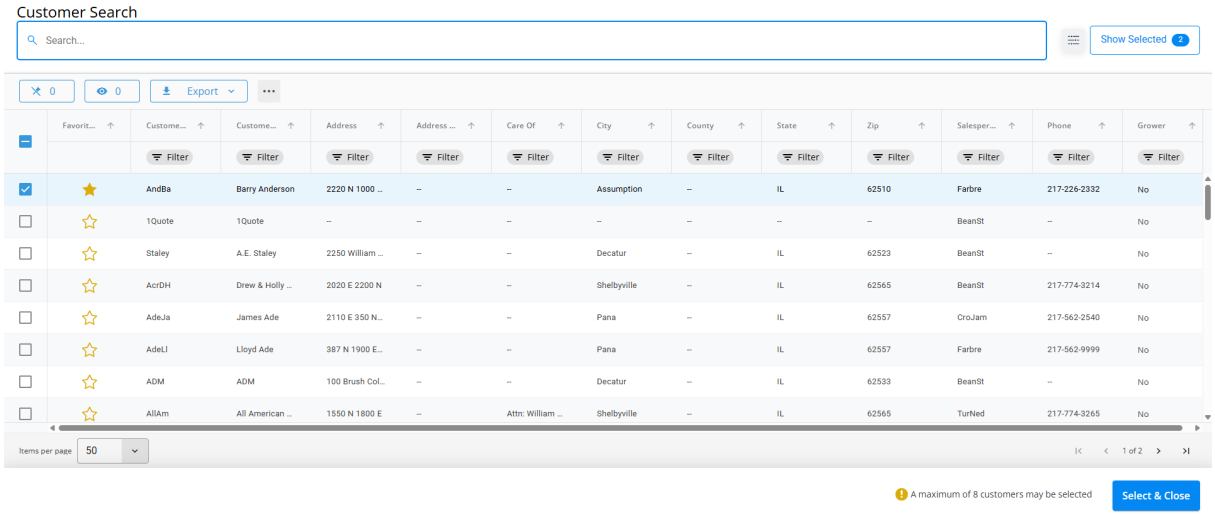


Customer/Field

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

By Customer

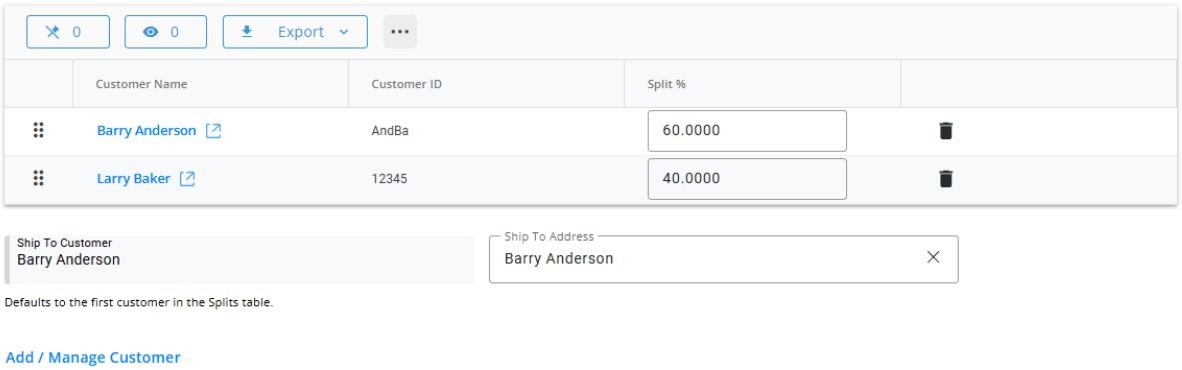
1. Use the *Search* field to find the specific Customer or scroll through the list. A maximum of eight Customers may be added. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Customers.



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. If multiple Customers are selected, the *Split %* can be adjusted but must equal 100. Customers can be removed with the **Delete** icon.

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

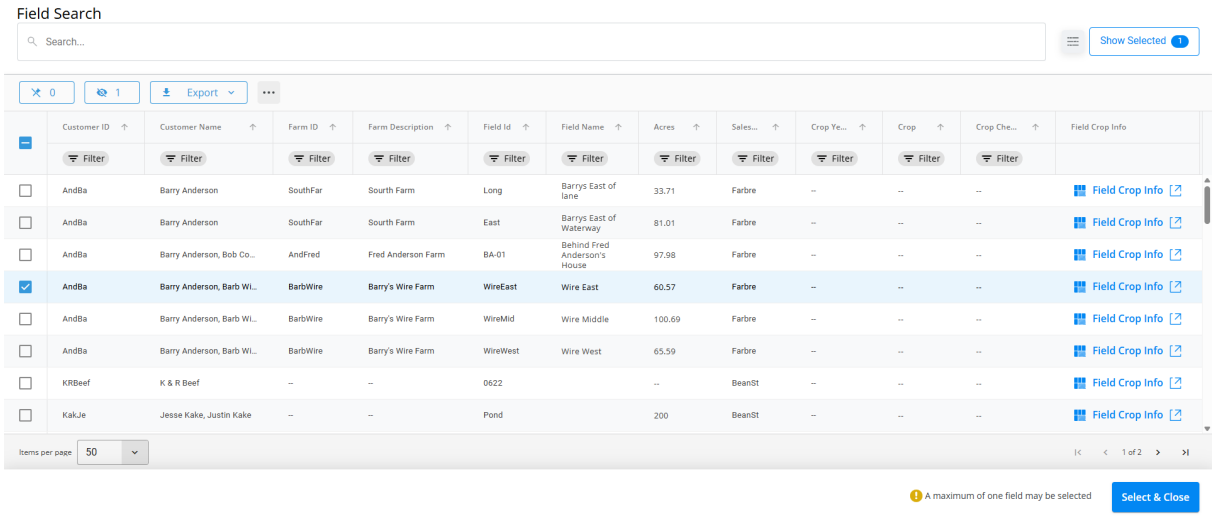
Overview page.



5. A *Ship To* can optionally be selected from the drop-down if applicable. The *Ship To Customer* defaults to the first Customer in the table. Rearrange Customers listed by selecting the grid of dots then dragging and dropping in the appropriate order.

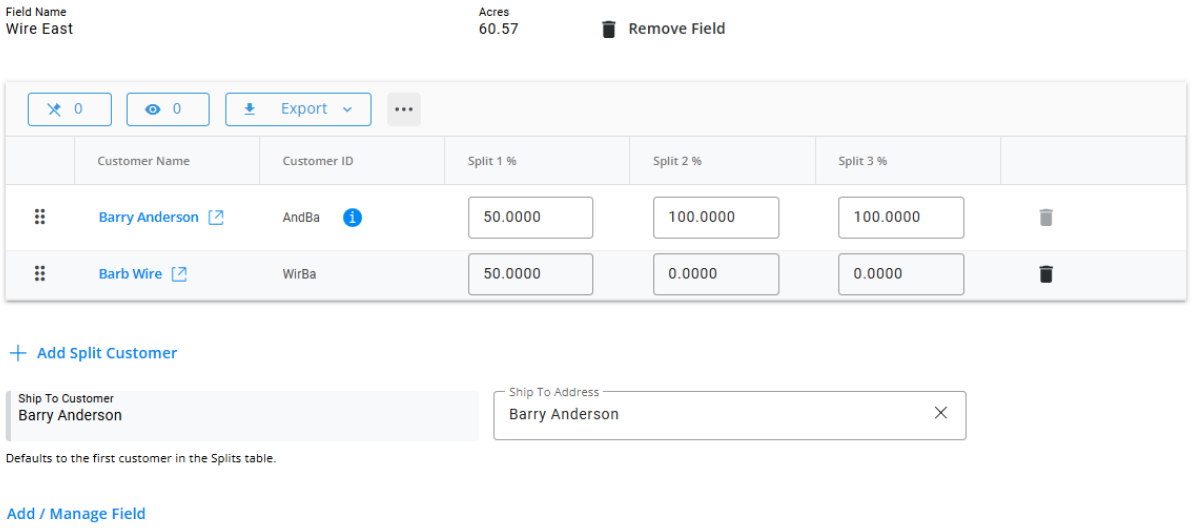
By Field

1. Use the *Search* field to find the specific Field or scroll through the list. A maximum of one Field may be added. 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 Fields are currently checked. Selecting the button filters the grid to show only the selected Fields.
3. Once the Field is selected, choose **Select & Close**.
4. If multiple Customers are part of the Field, the *Split %* can be adjusted but must equal 100. Customers can be removed with the **Delete** icon. The primary Customer cannot be removed.

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

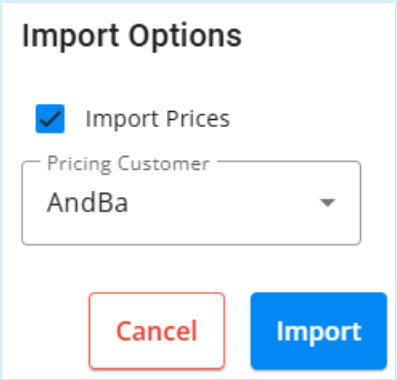


5. A *Ship To* can optionally be selected from the drop-down if applicable. The *Ship To Customer* defaults to the first Customer in the table. Rearrange Customers listed by selecting the grid of dots then dragging and dropping in the appropriate order.

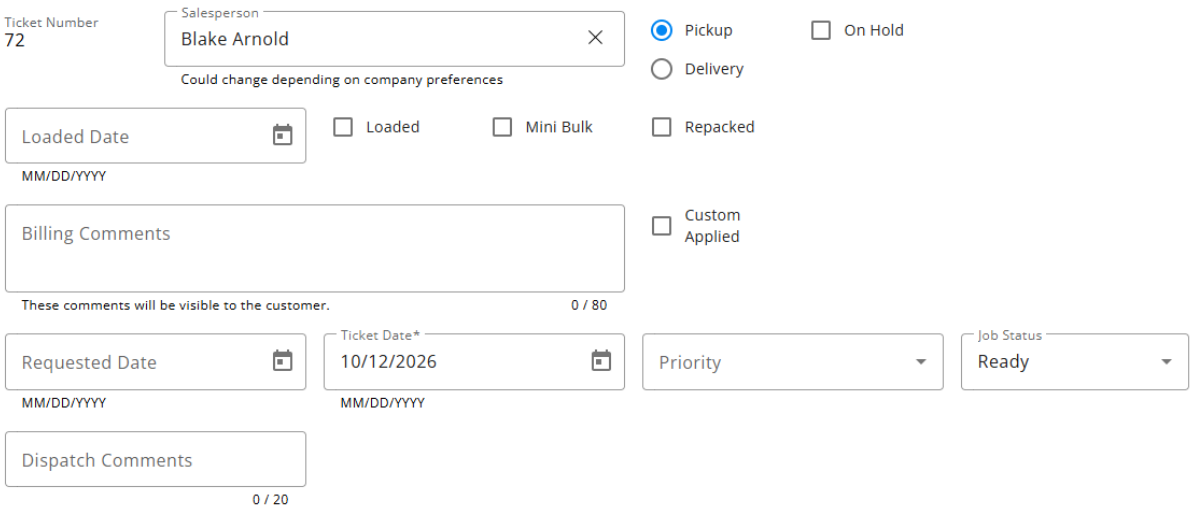
Order Details

Use the **Import Booking** or **Import Sales Order** buttons to import a single Booking or single Sales Order and bring in some *Order Details*, *Products*, and *Pricing*.

When importing a Booking, a prompt will display to choose which Customer's pricing to import. Unchecking *Import Prices* will not bring prices from the Booking into the Delivery. Additionally, quantities are tracked when importing a Booking into a Delivery.

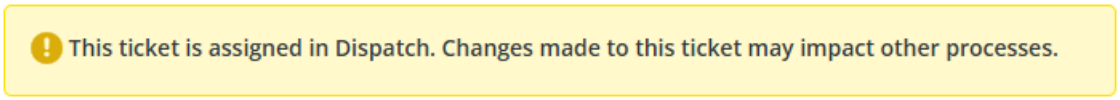


1. The *Order Number* will default once the Location has been selected.



2. The *Salesperson* defaults as the Salesperson selected in **Agvance SKY Admin** but can be adjusted.
3. Indicate if this will be for *Delivery* or *Pickup*.
4. If applicable, the Delivery Ticket can be marked as *On Hold*. This makes the Delivery Ticket unavailable for billing.
5. The Delivery can also be marked as *Loaded*, *Mini Bulk*, *Repacked*, or *Custom Applied*. If *Loaded*, be sure to indicate the *Loaded Date*.
6. *Billing Comments* can be entered and will be visible to the Customer.
7. Optionally enter the *Requested Date*.
8. The *Ticket Date* defaults to today's date but can be changed. This field is required.
9. Indicate the *Priority*.
10. The *Job Status* can be selected from the drop-down and indicates the status of the job in Agvance SKY Dispatch. Only *Ready* or *On Hold* can be selected (*In Process* and *Complete* are disabled here and can only be done in Agvance SKY Dispatch).

    Note: If the job is assigned or set to *In Process* in Agvance SKY Dispatch, the *Job Status* is view-only. When editing a Delivery that has been assigned in Agvance SKY Dispatch and is set to *Ready*, a warning will display indicating the job has been assigned, and changes made may impact other processes.

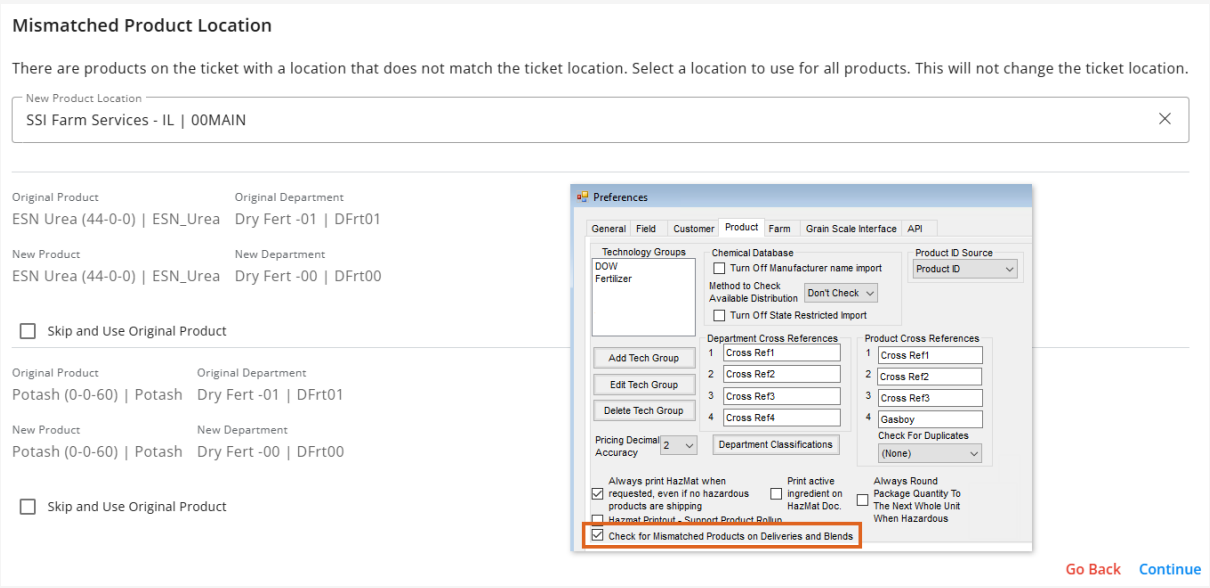
    

11. A brief note can be added for the dispatcher in the *Dispatch Comments* field.

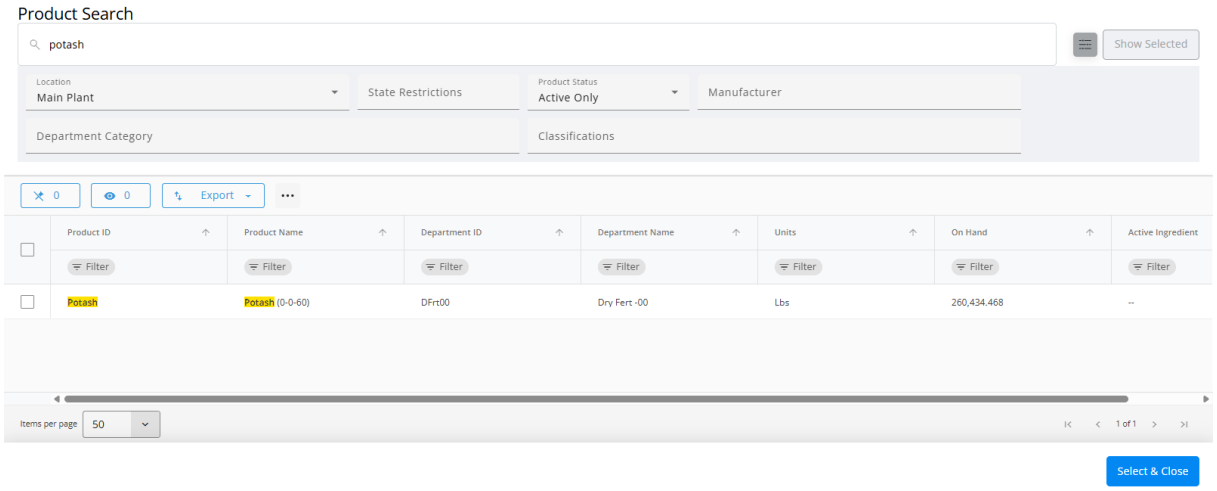
Products

When the *Check for Mismatched Products on Deliveries and Blends* preferences is checked on the *Product* tab at *Hub / Setup / Company Preferences* and Products have been added from a Location other than the ticket Location, a window will display upon saving to indicate the appropriate Location for the Product(s) or to *Skip*

and Use Original Product.

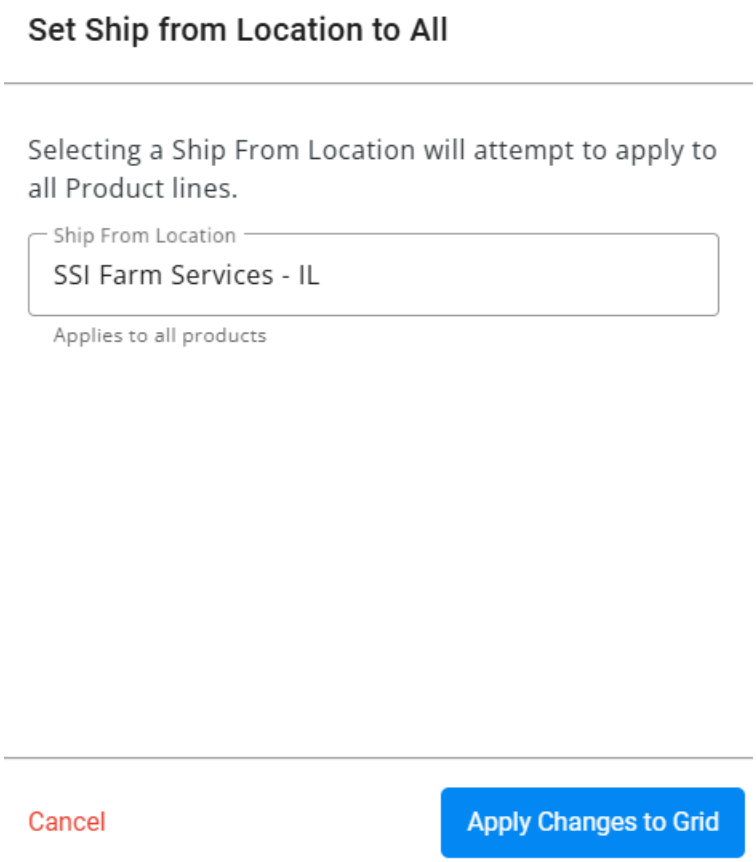


1. Select **+ Add Product**.
2. A **grid** of Products displays. Use the *Search* field to find the appropriate Product(s) or scroll through the list. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Products.

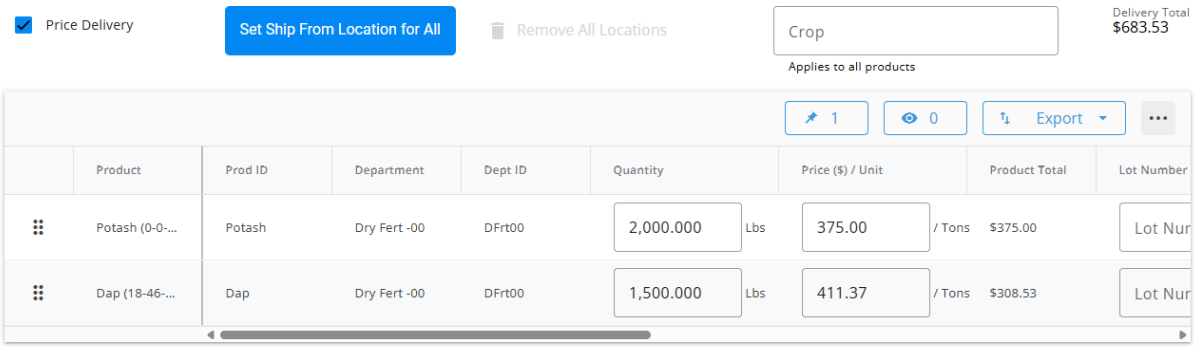


3. The **Show Selected** button next to the *Search* bar is enabled after selecting the Product(s). The number indicates how many Products are currently checked. Selecting the button filters the grid to show only the selected Products.
4. Once the Products are selected, choose **Select & Close**.
5. Optionally choose to *Price Delivery*. Additionally, the *Ship From Location* and/or *Crop* can be applied to all Products.
6. Choosing **Set Ship From Location for All** above the grid opens a new window to choose a Location and that will be applied to all Products in the grid. The *Ship From Location* can also be indicated on each Product line

item. Choose **Remove All Locations** to remove the *Ship From Location* from all Products.



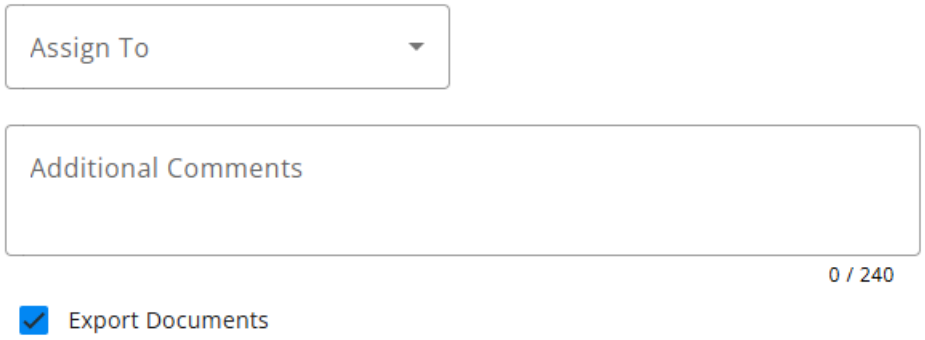
7. In the *Products* section of the Delivery, indicate the *Quantity* for each Product. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.



8. If applicable, choose a *Lot Number* from the drop-down.
9. If *Price Delivery* is checked, enter the *Price ($) / Unit* in the grid for each Product. The *Product Total* and *Delivery Total* will be calculated automatically.
10. Choose **+ Duplicate** to add another line of that Product.
11. 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.
12. The **Delete** button can be selected to remove a Product line.

Notes & Additional Info

Notes



1. Optionally assign unloaded Delivery Tickets to a Warehouse User with the *Assign To* drop-down. This will then allow filtering in the Warehouse app to display those tickets to the correct User.
2. *Additional Comments* can be entered in the *Notes* section.

   Note: A maximum of 240 characters are allowed in this field.
3. The *Export Documents* option gives the ability to download the *Bill of Lading(s)*, *Delivery Ticket(s)*, and *HazMat Sheet(s)* upon creating the Delivery.
4. After *Notes* are entered, **Create Order** can be selected but additional options are available on the *Additional Info* tab.

Additional Info

In this section, the *Customer PO #*, *Control Number*, *Territory*, and *Ship Via* can all be included.



Permits

For Products requiring a permit, the appropriate Federal Permit and/or State Permit can be applied. These permits must first be set up in Agvance Windows.



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.

