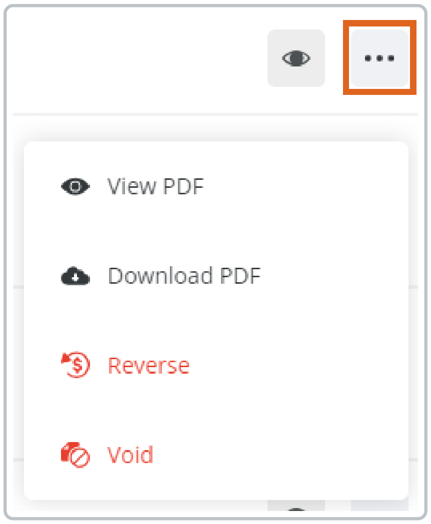
Deliveries - SKY Order

Last Modified on 10/06/2023 10:53 am CDT

Overview

Search for Deliveries by *Ticket* number, *Date*, *Customer*, or *Location* with the *Search* field.

Select the **Ellipsis** icon to **View PDF** or **Download PDF** of a Delivery or to **Reverse** or **Void** a Delivery.



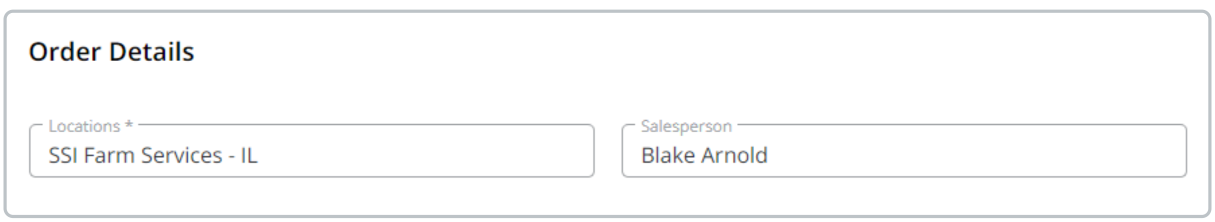
Add a Delivery

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

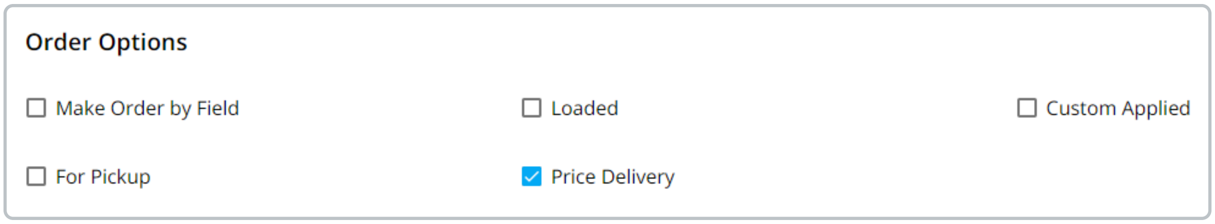
Note: Auto-numbering for Deliveries must be turned on in Agvance to create a Delivery in Order. The timing of turning on this feature impacts Agvance data. Please contact SSI for assistance.

Step 1: Order Details

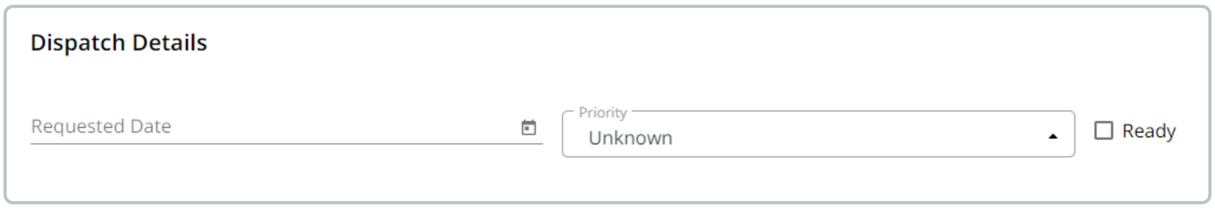
1. Enter the *Location* associated with the Delivery. The *Salesperson* defaults as the Salesperson selected on the User profile in SKY Admin but can be adjusted.



2. Select the appropriate *Order Options* for the Delivery.



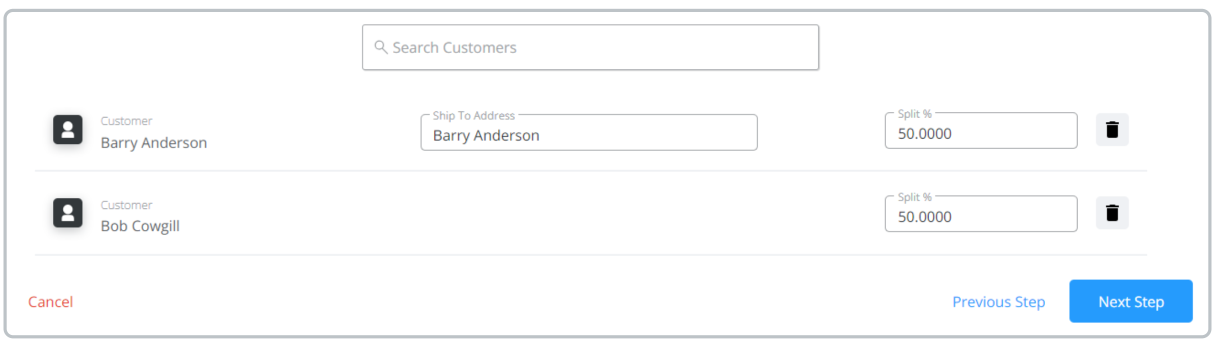
3. Optionally enter a *Requested Date*, *Priority*, and indicate the Delivery is *Ready*. This information will be available in SKY Dispatch upon saving.



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

Step 2: Splits

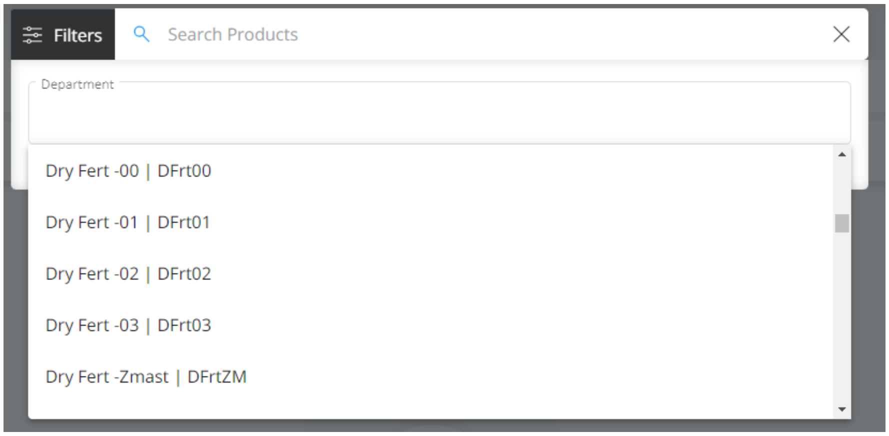
1. Select the customer or customers for the Delivery by using the *Search Customer* field. To remove a customer from the split, choose the **Trash Can** icon.



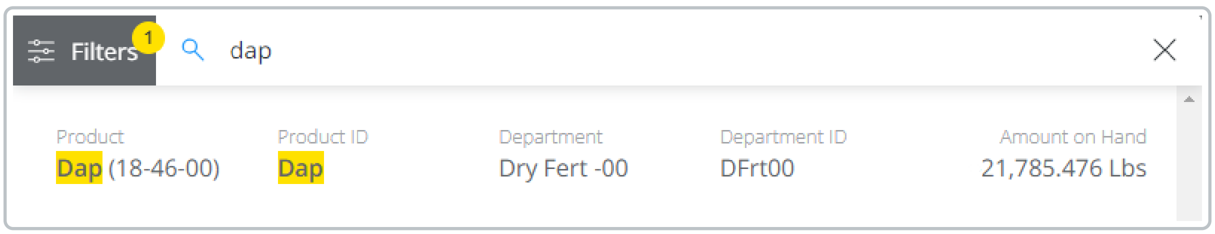
2. Customers with active Ship Tos will have a *Ship To Address* drop-down. If one of the Ship Tos is marked as primary, it will default in. If the first customer on the split does not have any Ship To addresses, the drop-down will be disabled.
3. The first customer listed on the split defaults to 100% of the split. Any subsequent customers selected default at 0%. Use the **Up/Down Arrows** to adjust the split percentage or enter the preferred split arrangements in the *Split %* fields.
4. When satisfied with the split arrangement, select **Next Step** or choose the next step in the process list to proceed.

Step 3: Products

1. Choose **Filters** to search for Products in a specific department.



2. To add products, begin typing a product name in the search bar and select the product(s). The *Product ID*, *Department*, *Department ID*, and *Amount on Hand* information for each product is displayed. To remove a product, select the **Trash Can** icon.



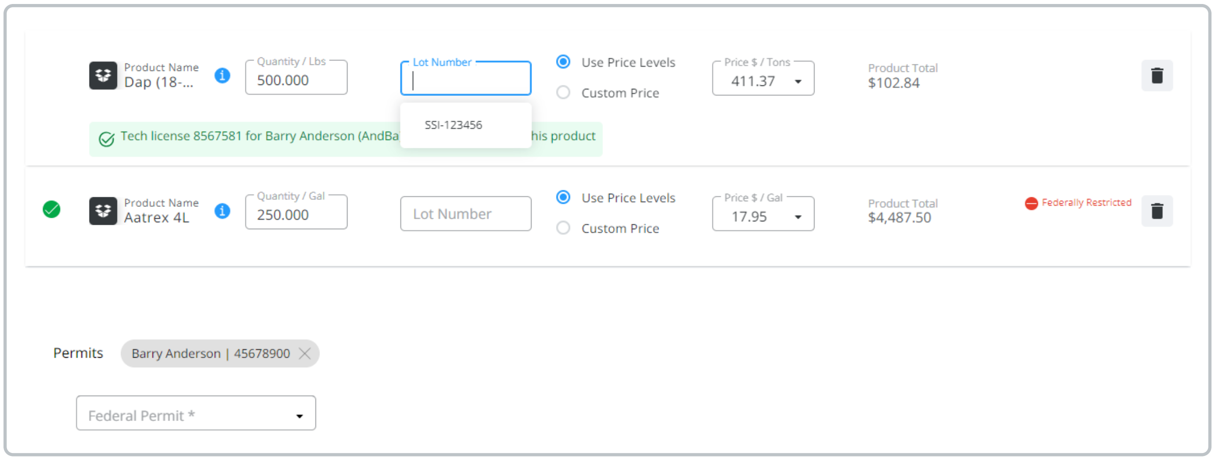
3. When all products have been added, select **Next Step** or choose the next step in the process list to proceed.

Step 4: Pricing

1. Enter a quantity for each 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 *Delivery 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 Delivery 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 Delivery.

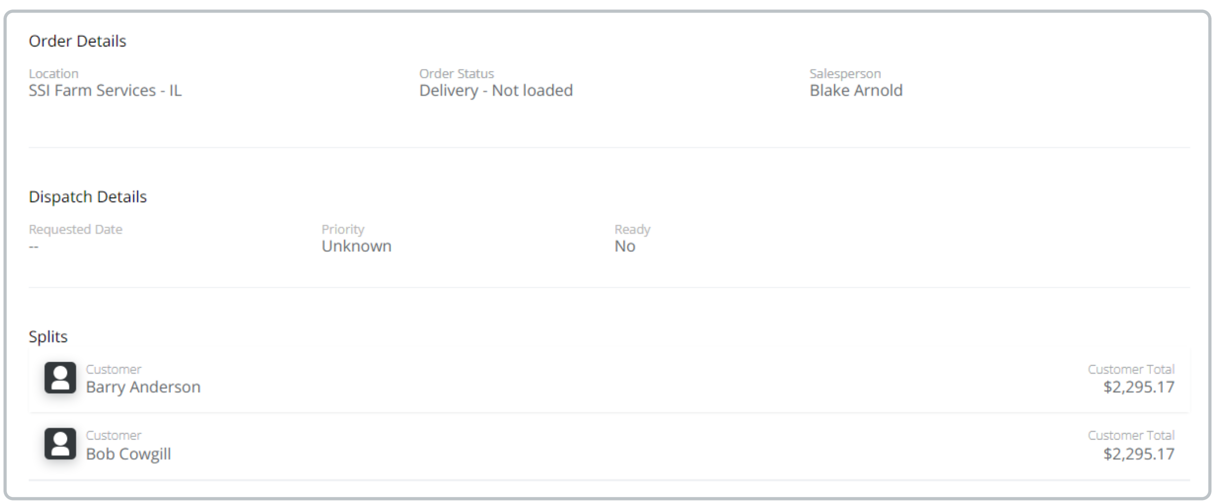
   Note: Products selected that are state or federally restricted display icons indicating a permit must be selected. When a valid permit is selected, the icon changes to a green checkmark.

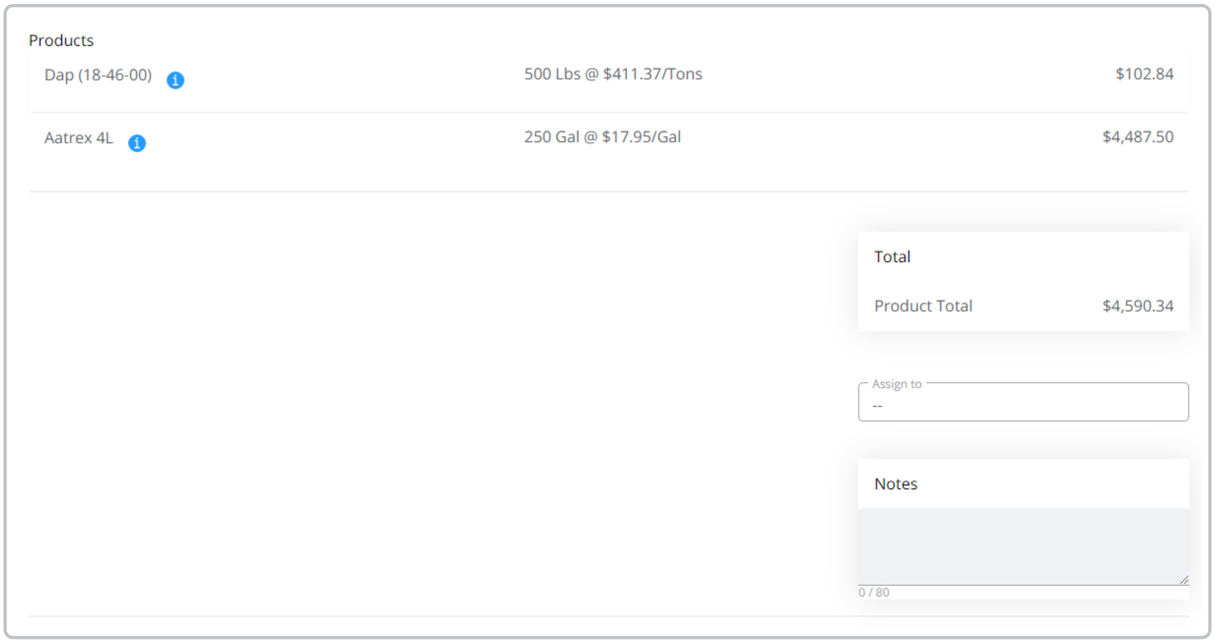


2. A *Lot Number* can be selected if already set up in Agvance. If the Inventory Department is set to*Disallow Lot Numbers* (found by editing the Department at *Accounting / Setup / Inventory Departments*), this option will not be available.
   Note: If the Product belongs to an Inventory Department that requires a Lot Number, the appropriate warnings/messages will display:
   - **Warn Only** – A message will display giving the option to continue saving the transaction or go back to select a Lot Number.
   - **Stop Sale** – A message will display stating a Lot Number is required with no option to move on to the next step or save.
3. When quantities and permits have been added, select **Next Step** or choose the next step in the process list to proceed.

Step 5: Review Order

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





2. Choosing someone in the *Assign To* field will automatically display the Delivery in the Warehouse app for that assignee indicating this order needs fulfilled.
3. Make corrections by selecting **Previous Step** to navigate to the previous step or select the appropriate stage from the process list.
4. When satisfied with the Delivery details, select **Save**.