

# Delivery Tickets in Agvance

Last Modified on 03/08/2024 2:30 pm CST

Delivery Tickets, used to record inventory movement prior to the billing step, may be reached from either *Inventory / Delivery Ticket* or the shortcut icon.

The *Customer Selection* screen that precedes the *Delivery Ticket* screen is exactly like the corresponding screen used at invoicing.

The *EPA Registration #* heading on the *Standard* and *Bill To / Ship To* Delivery Ticket documents reads *EPA / PCP Reg. Num.* to include the EPA and/or PCP Registration # for Canadian chemical products. If a product contains both an EPA and PCP Registration #, both numbers print on the Delivery Ticket document.

If a Delivery Ticket is unprocessed but has been transferred to field history, it cannot be edited.

**Note:** Be sure any spaces are removed from the beginning of the Customer's federal permit on the *Customer Profile* tab at *File / Open / Customers* to ensure the Delivery Ticket can be saved as expected.

## Delivery Ticket Window

**Add a Delivery Ticket**

**Split** Customer ID 239873 ? Acres  
Customer Name Larry Baker  
Field ID ?  
<Comments>

Ticket # 120000077  
Ordered 08/04/2023  
Loaded  
Note Pickup

☒ Loaded  
☐ Mini Bulk  
☐ Repacked  
☐ On Hold

	< Product Name >	<Gross>	<Tare>	Net	Unit	Use	Load Amount	Unit	Lot Number	<Crop Code>	Container	<Addon Code>	Co
1	Dap (18-46-00)	5000.000		5000.000	Lbs		5000.000	Lbs					

Recalculate from Gross/Tare Calculate Weight <Assigned User> Import  
Recalculate from Load Amt Additional Info... Bookings Scale Ticket Agrian Rec  
Plan Sales Order Set Rec #s Price Delivery

Blend Product Set  
Dispatch Info  
Date Requested Scheduled  
Time Requested Scheduled  
Priority Unknown  
<Comment>  
Job ID

Apply Roll Ups <Ship from Location>  
Print Method 1. No Roll Up Preview Save Cancel

- **Split** – This allows any predefined splits that might have been set at the *Customer Selection* screen or field file to be viewed. In a split situation, the first customer (usually the grower) is displayed on the Delivery Ticket.
- **Customer ID** – The Customer ID for the first customer in the split arrangement is displayed. The customer file may be viewed by selecting the **Question Mark** icon to the right of the ID. Only the first customer in a split arrangement is accessible at the **Question Mark** icon for a Delivery Ticket.

- **Field ID** – If entering the Delivery Ticket by Field, the ID will be filled out and field detail is accessed by selecting the **Question Mark** icon.
- **Comments** – Type in any comments to be conveyed to the Customers. By selecting the chevron at the end of the *Comments* field, saved comments may be selected.
- **Hint:** To add a new comment to the list of saved comments, double-click the *Comments* label.
- **Ticket #** – The ticket number is either computer assigned or manually entered based on the setting at *Setup / Preferences* under **Counters**. This is the control number that displays when the ticket is edited or imported in the future.
- **Ordered** – This is the date the order was placed.
- **Loaded** – This is the date that the product moved. This option automatically populates when the *Loaded* option is selected and the ticket is saved or when the Record Delivery Tickets as Loaded utility is used.
- **Note** – Choose between *Pickup* or *Delivered*.
- **Loaded** – Select this if the inventory is to be affected at the time of the save.
- **Mini Bulk** – Check this option when a product is being repackaged to a customer's mini-bulk tank. A report is available that summarizes all mini-bulk transactions called Mini Bulk Journal (found under *Reports / Inventory / Inventory Status*).
- **Repacked** – Optionally select this option if the product is repacked. The Repackaged report is available at *Reports / Inventory / Inventory Status*.
- **On Hold** – Setting a ticket *On Hold* makes it unavailable for billing. This status may be changed at any time by editing the ticket.
- **Recalculate from Gross/Tare** – The *Load Amount* will be recalculated based on the *Gross* amount less the *Tare* amount.
- **Recalculate from Load Amt** – Selecting this recalculates the *Gross* based on the *Load Amount* plus the *Tare*.
- **Calculate Weight** – This will calculate the net weight of all line items on the Delivery Ticket.
- **Additional Info** – This screen allows the entry of more information such as the number of acres, the salesperson, and applicator information.
- **Blend Product Set** - When interfacing with a Kahler blender, optionally select an SSI XML automated blender type product set for use in the automated blender file.
- **<Assigned User>** – Optionally assign unloaded Delivery Tickets to an Agvance user by double-clicking in the this field. This assignment will then allow filtering in Warehouse to display those tickets to the correct user.
- **Bookings** – Populate the *Delivery Ticket* screen with products from any selected Booking. The quantities that import are the booked amount less any previously invoiced or delivered amounts. Edits may be made to the imported quantities.
- **Plan** – Populate the *Delivery Ticket* screen with the products and quantities from the selected plan created in the Planning module. The Plan is not updated in any way by this action. Therefore, a Plan may be imported more than once.

- **Scale Tickets** – If the optional Agvance Scale Interface is being used, this allows the import of any Scale Tickets not yet posted. Contact SSI Support for more information.
- **Sales Order** – Sales Orders from either the Planning module or the Mobile Sales module may be imported to bring in products and quantities from the sales order.
- **Agrian Rec** – If using the Agrian interface, the Agrian Recommendations may be imported.
- **Set Rec #s** – If using the Agrian interface, this resets the additional comments from the Agrian import.
- **Apply Roll Ups** – If Roll Ups are selected on any of the lines in the grid, selecting this adds the products to the grid for the selected roll ups.
- **Ship from Location** – This area is available when the inventory preference to *Create ICT Based on Ship From Location* is enabled. Selecting a location in this area changes the *Ship From* location of all products on the Delivery Ticket to this selected location. When saving the Delivery Ticket, an Inter-Company Transfer is created to move the product from the shipping location to the billing location.
- **Product Quotes Icon** – Quotes given to the Customer and saved at *File / Open / Customer* by selecting the **Product Quote** icon can be called up at the *Delivery Ticket* screen and displayed for reference. If a quote exists for one of the selected products on the ticket, the icon appears red. By selecting the **Quote** icon, the quoted price displays.
- **Note:** This Quote function should not be confused with quoted prices set in the Planning or Blending modules that default at invoicing.
- **Price Delivery** – This allows the prices to be set and printed on the Delivery Ticket and displays a window to allow a price to be entered for each product on the ticket. At the bottom of the window, the customer selection allows the appropriate customer to be selected, and selecting **Default Prices** sets pricing based on the Pricing and Dept. Overrides on the customer file. Choosing **Default Quoted Prices** allows pricing from the customer's quotes to be defaulted to the Delivery Ticket. Selecting either of these pricing defaults elevates the prices set at the Delivery Ticket to the *Quoted* status when the ticket is imported into an Invoice. There is no provision for indicating to use Prepay.

1. Navigate to *Accounting / Inventory / Delivery Ticket* and select **Add** or choose the **Add a Delivery Ticket** icon and select a Customer or Field.
2. Double-click the *Product Name* column heading and choose the products. Double-click on each product being delivered, enter the *Quantity* in the grid below, and choose **Done**.  
**Note:** If the *Loaded* option is selected, inventory will be affected when the ticket is saved. Do not mark this checkbox if the Delivery Ticket will be loaded at a later time. The Delivery Ticket must be marked as *Loaded* to be available for invoicing.
3. Optionally enter prices by selecting **Price Delivery**. These prices carry through to the Invoice.
4. If adding, select **Recalculate from Gross/Tare** to populate the *Net* amount. If changing the *Load Amount*,

select **Recalculate from Load Amt** to update the column.

5. Choose **Additional Info** to optionally enter more information about the ticket.
6. Select **Save** and optionally print the ticket. Choose **Preview** to review the *Print Method* selected before saving.

**Note:** Remember to import the loaded Delivery Ticket into an Invoice to prevent a double adjustment to inventory.

## Posting Notes

- **Delivery Ticket Number** – The last number used is recorded.

If the Delivery is set to *Loaded* at the time of the save:

- **Inventory Detail** – A record is made for each line item to leave an audit trail of activity.  
**Note:** In the case of an item with a Manufactured Blend Formula that is set to relieve inventory at billing, the finished good is affected with an outbound entry at this time.
- **Inventory Amount on Hand** – This amount is updated for each line item.  
**Note:** In the case of an item with a Manufactured Blend Formula that is set to relieve inventory at billing, the finished good is affected with a decrease in Amount on Hand.
- **Voids** – The entry in the database is marked *Voided* and *Invoiced*. All other postings are reversed.