Import Field Plans or Sales Orders

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Field Plans created in the Agvance Planning module or Sales Orders created in the Planning module, Agvance Sales module, or Order app may be imported into Bookings. This process maintains any quoted prices that were set at the Field planning stage.

Process

1. At *A/R / Product Bookings*, select **Add**.

2. If a Field Plan is being imported or a Sales Order entered by field, double-click in the *By Field* area and select the field. The *All* plans that include this customer option displays all Plans for the selected customer. With this option unchecked, Agvance only looks at the first customer on the Plan. Sales Orders might only be associated with a customer's name instead of being associated with a specific field. Sales Orders entered using this method may be imported by double-clicking and selecting the customer.

3. After the selection of the field or customer(s), select **Import Plans/Sales Orders** in the lower left corner of the *Customer Selection* screen. This causes the Field Plans and Sales Orders to be displayed. Tag the Plans or Sales Orders that apply to this Booking.

4. The items are brought into the *Booking* screen at List Price, the customer's Level Price, or the quoted price, depending on how the original document was saved. The products, pricing, and quantities may be edited as necessary. Select the *P* column to indicate each line item that is prepaid. When the items and prepay indicators are set correctly, **Save** the Booking.