Sales Order to Invoice Pricing

Last Modified on 08/02/2024 11:27 am CDT

When pricing from the Sales Order needs to default on the Invoice, it is important the Sales Order is imported into a Booking. The recommended process as well as an alternate method is below.

Recommended Process

 A Sales Order is a transaction in the Planning module often used by sales staff to propose price and quantity agreements to Customers. Because the Customer is agreeing to what is presented on the Sales Order, it is important the Sales Order's net price is used when the Product is invoiced. In the example below, a Sales Order with an Order Type of Booking is added for multiple seed Products.

| 🖳 Add / | A Sales O | rder | | | | | | | | | | x |
|--------------|----------------------|-----------|---|---------------|------------|--------------|------|----------------|---------|--------|---------------------|----|
| Order | Number | 50 | | | | | | | Те | rms | (None) \checkmark | |
| Or | der Date | 11/18/202 | 4 | | | Offer Expire | s D | ate 12/16/2024 | 4 | s | tart Date _/_/ | 4 |
| E Deliv | stimated ery Date | 04/14/202 | 25 🧰 | | | Paymer | it D | ate _/_/ | # Ex | pira | tion Date _/_/ | |
| Ord | der Type | Booking | \sim | | | Check N | umi | ber | | | Processed | |
| | Status | Offered | \sim | | | | | | | | | |
| C | Comment | Spring Se | ed Order | | | | | | | | | |
| | | | | | | | | | | | | |
| Apply | Prices to | All | Customer | AndBa | \sim | Barry Ander | son | I | | | | |
| | Dept ID | Prod ID | <product< td=""><td>Name></td><td>Quantity</td><td>Inv Units</td><td><</td><td>Bill Units</td><td>Lot Num</td><td>be</td><td>Tech License Number</td><td>Cr</td></product<> | Name> | Quantity | Inv Units | < | Bill Units | Lot Num | be | Tech License Number | Cr |
| 1 | CDek00 | D580 | DKC58-06 | RIB AF SS 80 | 100.000 | Bags | 2 | Bags | | \sim | | Co |
| 2 | BAsg00 | 174026 | AG49X6 F | RR2X 140M F/ | 60.000 | Bags | 6 | Bags | | \sim | | So |
| 3 | BAsg00 | 174028 | AG5233 F | RR2Y/STS 140 | 60.000 | Bags | 6 | Bags | | \sim | | So |
| < Price L | evel List | Price | ~ | Print Method | 1. No Roll | up | | | | | v Total 28435 | > |
| 2 | Apply | Tax | Apply Roll | ups Apply Dis | scounts | View Net P | rice | Additional In | Ifo | S | ave Cancel | |

The Apply Discounts button is used to add Sales Order Discounts.

Note: These discounts come from *Planning / Setup / Sales Order Discounts* and are not the same as Payment Terms.

| 🖳 Ар | ply Pricing Discount | s | | | | | | × |
|-------------------|---|------------|------|---------|---------|-------|----|--------|
| | <discount name=""></discount> | Quantity | Rate | Туре | Total\$ | | | Manu\$ |
| 1 | Corn 6% | 100.000 | 6.00 | Percent | | | | |
| 2 | Soybeans 4% | 120.000 | 4.00 | Percent | | | | |
| NOTE | | | | | | | | |
| discou sales o | :: a maximum of 5 pricin unts can be applied to e order | ig each | | | | Apply | OK | Cancel |

The View Net Prices button shows the Net Price for each Product with the offered discounts taken into

account. This is the price displayed on the Invoice.

| • | View | / Sales Or | der Price | For Customer | AndBa Barry | Anderson | | | | | | × |
|---|------|------------|-----------|--------------|-------------|--------------|--------------|----------|-----------|-------------------|---------|----------|
| | | D | | D | 0.01 | D : 1 | D | 0 0 | | | 0.15.4 | 0.000 |
| | | Dept ID | Prod ID | Product Name | Crop Code | Discount | DiscountType | Quantity | Net Price | Average Net Price | Split # | Split % |
| 1 | | CDek00 | D5806 | DKC58-06RI | Corn | Corn 6% | Percent | 100.000 | 195.66 | 195.66 | 1 | 100.0000 |
| 2 | • | BAsg00 | 174026 | AG49X6 RR2 | Soybeans | Soybea | Percent | 60.000 | 60.96 | 60.96 | 1 | 100.0000 |
| 3 | | BAsg00 | 174028 | AG5233 RR2 | Soybeans | Soybea | Percent | 60.000 | 60.96 | 60.96 | 1 | 100.0000 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | Done |

2. After the offer is approved, enter a Booking to lock in the contract with the Customer. Import the Sales Order

into the Booking, and Agvance automatically rolls the Sales Order Discounts into the price.

| •5 | A | dd E | Booking #12 | 00281 Cu | stome | r 1 of 1 | | | | | | | | | | | × |
|----|---|------|---|-----------|---------|----------|---------|----------|--------|----------|---------------------|----------|---|--------|--------------|------------|-------------------|
| [| Sp | lits | Customer ID | AndBa | ? | | Re | egular | | PrePay | UAC | Cr | edit Limit | | Book Date | 11/05/2024 | |
| | | Си | stomer Name | Barry Ar | dersor | 1 | 23 | 374.60 | | 14659.25 | 3000.0 | 0 7 | 75000 | | Start Date | _/_/ | |
| | | | Field ID | | ? | | | | | | | | | Ехр | iration Date | _/_/ | |
| | | | <comments></comments> | • | | | | | | | | | ~ | | Price By | Products | \sim |
| Ē | | Ge | neric Prepay | | | | | _ | | | Business | Influenc | 8 | Pr | ice Default | Individual | \sim |
| | | | | | Price L | evel | | Prepa | y Am | ount | | | ~ | | Terms | (None) | \sim |
| | | | | | | | · ~ | | _ | | | | | | | | |
| | | _ | <product na<="" td=""><td>ame></td><td></td><td>Quantity</td><td>Inv</td><td>Levi</td><td>P</td><td>Dwn</td><td><unit \$=""></unit></td><td>Bill U</td><td>Total \$</td><td>S#</td><td><%></td><td>Your Share</td><td><am< td=""></am<></td></product> | ame> | | Quantity | Inv | Levi | P | Dwn | <unit \$=""></unit> | Bill U | Total \$ | S# | <%> | Your Share | <am< td=""></am<> |
| | 1 | ► | DKC58-06RI | IB AF SS. | | 100.000 | Bags | Qu | Ш | | 195.66 | Bags | 19566.10 | 1 | 100.0000 | 19566.10 | |
| | 2 | | AG49X6 RR | 2X 140M. | | 60.000 | Bags | Qu | | | 60.96 | Bags | 3657.60 | 1 | 100.0000 | 3657.60 | |
| | 3 | | AG5233 RR | 2Y/STS 1 | 4 | 60.000 | Bags | Qu | | | 60.96 | Bags | 3657.60 | 1 | 100.0000 | 3657.60 | |
| | < | | | | | | | | | | | | | | | | > |
| | | | | | | Pla | inned E | Booking | o Pav | ment Met | hod | | | | | | |
| | | An | alysis | | | | | | | | | | Tota | al Boo | oked 268 | 381.30 | |
| ľ | | | Dellara | 0 | | | | | | | | | Amo | untl | Paid | 0.00 | |
| l | A | рріу | Rollups | Cor | ITACT F | ormat: | | | | | | | ~ | | | | |
| | <s< td=""><td>ales</td><td>person ID></td><td>Farbre</td><td></td><td>~</td><td>] Cont</td><td>ract Sig</td><td>gned</td><td></td><td></td><td>Additio</td><td>nal Comments:</td><td></td><td></td><td></td><td></td></s<> | ales | person ID> | Farbre | | ~ |] Cont | ract Sig | gned | | | Additio | nal Comments: | | | | |
| | Co | otro | H E0 | | | | Anci | an Coll | | anatura | | | | | | | ^ |
| 1 | | | | | | | Assi | gri Seli | er Sli | gnature | | | | | | | \sim |
| | 2 | Z | Print Method 1. No Roll up |)) | | | | | | \sim | | Can | cel <ba< td=""><td>ack</td><td>Next</td><td>> Sav</td><td>e</td></ba<> | ack | Next | > Sav | e |

It is important to create a Booking even if the Customer is not actually prepaying the contract because the Booking is the document that locks in the price for the Invoice.

Note: It is possible to create a *Pickup* or *Deliver* type of Sales Order and import it directly into a Delivery Ticket.

3. The Booking should then be imported into a Delivery Ticket. Because the Delivery Ticket does not allow for split pricing, it is important the Delivery Ticket is left unpriced, allowing the price on the Invoice to be established directly from the Booking. When importing from the Booking, make sure the *Import Prices* option is unchecked.

| 🛃 Select a Ticket | t | | | | | > |
|-------------------|--|----|---------------------|---------------|-------------------------|-----------|
| | | | | Select a Boo | king For Anderson Barry | |
| Customer ID | Customer Name | ^ | Booking | △ Location | Date | Split Y 🐴 |
| 239873 | Baker Larry | | 1200258 | 00MAIN | 09/19/2023 | N |
| 3Quote | Hawkins Michael | | 1200265 | 00MAIN | 11/08/2023 | Y |
| AdeJa | Ade James | | 1200269 | 00MAIN | 12/04/2023 | N |
| AdeLI | Ade Lloyd | | 1200274 | 00MAIN | 03/01/2024 | N |
| ADM | ADM | | 1200275 | 00MAIN | 03/12/2024 | N |
| AllAm AllFu | All American Farms All American Farms - F | | 1200279 | 00MAIN | 03/22/2024 | N |
| AllPa | Allen Paul | | 1200281 | 00MAIN | 11/05/2024 | N |
| AndBa | Anderson Barry | | | | | ¥ |
| BevHil | Beverly Hills | Υ. | < | | | > |
| Cu | istomer ID | | Import i | Prices | Show Invoiced Bookings | |
| | | | Use Price f Bool | king (None) V | Import | Cancel |

The example below shows the Delivery Ticket with the correct quantities and no prices.

| 📱 Add a Delivery Ticket | | | | | | | | | | | | | | 3 |
|---|-----------------|---|------------------------|-----------|--|------------------------------|-------------|------|--------------------|---|---------------------------------|---|---------------------------------|-------------|
| Split Customer ID AndBa ? Customer Name Barry Anderson Field ID ? Field ID ? Booking #1200281 | | | A | cres ~ | | | | | Ticl Ord Los | ket# 12 ered 08 aded Note Pio | 000009 02/202 0// ckup | 2 4 | Loaded Mini Bulk Repacked | |
| < Product Name > | <gross></gross> | <tare></tare> | Net | Unit | Use | | Load Amount | Unit | Lot Number | <cr< td=""><td>op Cod</td><td>Container</td><td><addon code=""></addon></td><td>Comm</td></cr<> | op Cod | Container | <addon code=""></addon> | Comm |
| 1 DKC58-06RIB AF SS 80M B | 100.000 |) | 100.000 | Bags | | | 100.000 | Bags | | | \sim | | | |
| 2 AG49X6 RR2X 140M F/PV/B | 60.000 |) | 60.000 | Bags | | | 0.429 | Bags | | | \sim | | | |
| 3 AG5233 RR2Y/STS 140M F/ | 60.000 |) | 60.000 | Bags | | | 0.429 | Bags | | | \sim | | | |
| < | | Product Name DKC58-06RIB A AG49X6 RR2X 1 AG5233 RR2Y/S | F SS 140M 3TS 14 | ব | Unit \$> U 0.00 E 0.00 E 0.00 E | Jnit Bags Bags Bags | | | | | | | | > |
| Recalculate from Gross/Tare Calcula Recalculate from Load Amt Additio Blend Product Set | | | | | | | | | | Agrian Set Re | Rec c#s | | Pr Deli | ice very |
| Date Requested Sch | AndBa | ∼ Defa | ult Prices |)efault (| Quoted Pr | ices | ОК | | Cancel | Apply R | Roll Ups | <ship fro<="" td=""><td>m Location></td><td></td></ship> | m Location> | |
| Priority Unknown ~ | | | | | Print M | lethod | | | | | | | | |
| Job ID | | | | | 1. No | Roll U | p | | | ~ | Pre | view | Save Ca | ncel |

4. Import the Delivery Ticket into an Invoice. The line items default in booked with the price from the Sales Order.

| voice | Ana | lvsis | Тах | Addi | tional Info S | ource T | Tickets | Booking | Recap | IFT Deta | ils | | | | | | |
|--|--|----------|---------------|----------------------|---------------|---------|---------|---------|---------------------|----------|--------------------------|-------|-----------|--|-------|--------------------------------------|--------|
| Split | ID | AndB | a. | ~ 2 | Grain Bala | inces | Rec | oular | PrePa | v | UAC | Cre | dit Limit | Invoice I | Data | 08/02/202 | 4 📅 |
| Cus | stomer | Barry | Anders | × : | | | 237 | 4.60 | 14659.2 | 25 | 3000.00 | 7 | 5000 | Due I | Date | 09/15/202 | 4 |
| Fi | ield ID | | | ? | 1 | | | | | | | | | Price | e By | Products | · · · |
| Ti | ickets | 12000 | 0092 | | | | | | | | | | | Price De | fault | Individual | |
| <com< td=""><td>ments></td><td>Bookir</td><td>ng #120</td><td>0281</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>~</td><td> 🔥 Ter</td><td>rms</td><td>N15</td><td>, ,</td></com<> | ments> | Bookir | ng #120 | 0281 | | | | | | | | | ~ | 🔥 Ter | rms | N15 | , , |
| | , | | | | | | , | | | | | | | | | | |
| | <pro< td=""><td>duct N</td><td>ame></td><td></td><td>Quantity</td><td>Inv U</td><td>Level</td><td>Status</td><td><unit \$=""></unit></td><td>Bill U</td><td>Total</td><td>Split</td><td><%></td><td>Your Share</td><td>Тах</td><td>Dept ID</td><td>Prod</td></pro<> | duct N | ame> | | Quantity | Inv U | Level | Status | <unit \$=""></unit> | Bill U | Total | Split | <%> | Your Share | Тах | Dept ID | Prod |
| 1 🕨 | DKC | 58-06R | IB AF S | SS | 100.000 | Bags | Book | Book | 195.66 | Bags | 19566.00 | 1 | 100.0000 | 19566.00 | | CDek00 | D5806 |
| 2 | AG49 | 0X6 RF | R2X 140 | DM | 60.000 | Bags | Book | Book | 60.96 | Bags | 3657.60 | 1 | 100.0000 | 3657.60 | | BAsg00 | 17402 |
| 3 | AG52 | 233 RR | R2Y/ST | 5 1 | 60.000 | Bags | Book | Book | 60.96 | Bags | 3657.60 | 1 | 100.0000 | 3657.60 | | BAsg00 | 17402 |
| | | | | | | | | | | | | | | | | 1 | |
| | | | | | | | · | | | | | | | | | | |
| ٢ | | | | | | | | | | | | | | | | | > |
| < Prod | 1 ID | ~ | | | | | | | | | Bar (| Code | | | | | > |
| c Prod Extra (| I ID Charge Rollups | × [s | Discou Man | nt Prog uf Billir | rams | | | | | Арр | Bar (ly To All Custo | Code | Pre | Subtotal epay \$ Used Sales Tax mount Due | | 26881.20 0.00 0.00 26881.20 | > |

Alternate Method

The process described on the *Recommended Process* tab assumes the Sales Order is being used ahead of season to negotiate contracts that eventually become Bookings. Some companies use the Sales Order during season as an order staging tool, either in place of or in addition to unloaded Delivery Tickets. In this case, the Sales Order is for quantity only and is not associated with a Booking.

Note: It is important when using this method to make sure the Delivery Ticket is not priced because the Booking contract price may be overridden when the ticket is invoiced later.

| Terms F1 V. |
|-------------------------------|
| 2024 Start Date _/_/_ |
| Expiration Date _/_/ |
| Processed [|
| Processed |
| |
| |
| |
| |
| Lot Numbe Tech License Number |
| ~ |
| ~ |
| ~ |
| |

1. Add a Sales Order and set the Order Type to Pickup or Deliver.

 Import the Sales Order into a Delivery Ticket. By default, Agvance imports the pricing from the first Customer in the split. It is important to change this to (*None*) so the Delivery Ticket is unpriced. Otherwise, the price from the Sales Order will override any available Bookings when the ticket is invoiced.

| 🖳 Import S | ales Order | | | × |
|-------------|----------------|----------|---------------|---------|
| | | | | |
| Order # 🛆 | Order Date | CustID | Customer | FieldID |
| 51 | 11/18/2024 | AndBa | Barry Anders | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| × | | | | / |
| | Order # | | | |
| Sales Orde | r Filter | | | |
| Customer | AndBa \sim | Location | 00MAIN \sim | |
| Status | Approved | \sim | | |
| Import Prid | ce from (Name) | | | |
| Which Cu | istomer (None) | ~ | Import | Cancel |

The correct end result is a Delivery Ticket with the right Products and quantities, but no prices.

| 🛃 Add a Delivery Ticket | | | | | | | | | | 22 |
|---|--|---|--------------------|------------|----------|---------------------------------------|--|---|---|-------------------|
| Split Customer ID AndBa ? Customer Name Barry Anderson Field ID ? <comments> Sales Order 51 Spring</comments> | Seed Order | Acre | s v | | | Ticket # Ordered Loaded Note | 120000093 08/02/2024 _/_/ Delivered | 3 | Loaded Loaded Mini Bulk Repacked On Hold | |
| < Product Name > | <gross> <tare></tare></gross> | Net U | nit Use L | oad Amount | Unit Lot | Number | <crop cod<="" td=""><td>Container</td><td><addon code=""></addon></td><td>Comm</td></crop> | Container | <addon code=""></addon> | Comm |
| 1 DKC58-06RIB AF SS 80M B | 100.000 | 100.000 B | ags | 100.000 | Bags | (| Corn 🗸 | | | |
| 2 AG49X6 RR2X 140M F/PV/B | 60.000 | 60.000 B | ags | 0.429 | Bags | 5 | Soyb 🗸 | | | |
| 3 AG5233 RR2Y/STS 140M F/ | 60.000 | 60.000 B | ags | 0.429 | Bags | 9 | Soyb 🗸 | | | |
| Recalculate from Gross/Tare Calcula Recalculate from Load Amt Additio Blend Product Set | Proce Delivery Product Name Product Name AG49x6 RR AG5233 RR | <unit s=""> Unit 0.00 Bags 0.00 Bags 0.00 Bags</unit> | | | | X Ag | rian Rec t Rec #s | | Pr Deli | > ice ivery |
| Dispatch Info Date Requested Sch Time Requested Sch Priority Unknown ~ <comment></comment> | AndBa v Defi | ault Prices Def | ault Quoted Prices | ОК | Canc | cel App | oly Roll Ups | <ship fro<="" td=""><td>m Location></td><td></td></ship> | m Location> | |
| Job ID | | | 1. No Roll Up | | | | ~ Prev | riew | Save Ca | ncel |

Create the Sales Order with Bill Splits

 Add a Sales Order and include a split. In the example below, a *Booking* type of Sales Order is added for two Customers with a 50/50 split.

| 🖳 Add A Sales | s Order | | | | | | |
|------------------------------------|---|---------------------|-------------------------------|-----------------|-----------------|--------------|--------|
| Order Numbe | er | | | _ | | Terms (None) | × |
| Order Da Estimat Delivery Da | 🖳 Sale | es Order Splits | | | | | × = |
| Order Ty | <by fi<="" td=""><td>eld></td><td></td><td></td><td></td><td></td><td>ed 🗆</td></by> | eld> | | | | | ed 🗆 |
| Stat | | <cust id=""></cust> | Cust Name | | S-1 | S-2 | S-3 |
| Comm | 1 | AndBa 239873 | Anderson Barry Baker Larry | | 50.0000 | | |
| | _ | | | | | | |
| Apply Price | | | | | | | |
| Dep | | | | | | | ber Cr |
| | | | | | | | |
| | | | | | | | |
| | | | | | | 01/ | 4 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| < | | | | _ | | | > |
| Price Level | | ~ | Print Method 1 No Rol | lup | | V Total | |
| | | - | | | | - Iotai | |
| Qu _{ote} Ap | oply Tax | Apply Rollups | Apply Discounts | View Net Prices | Additional Info | Save | Cancel |

The window below shows the first Customer with a price of \$208.15 per bag.

Note: To apply the same price to all Customers on the split, select the **Apply Prices to All** button.

| 🖳 Add A Sales O | rder | | | | | | | | - • × |
|----------------------------|-----------|--|---------------|------------|---------------|-----------------|-----------------|---------------|-------------------|
| Order Number | 52 | | | | | | | Terms (Non | e) ~ |
| Order Date | 11/18/202 | 4 | | | Offer Expires | s Date 12 | /16/2024 | Start Da | te _/_/ |
| Estimated Delivery Date | 04/14/202 | .5 | | | Paymen | t Date | !_! 🛄 | Expiration Da | te// |
| Order Type | Booking | \sim | | | Check N | umber | | | Processed |
| Status | Offered | ~ | | | | | | | |
| Comment | Spring Se | ed Order S | plit 50/50 | | | | | | |
| | | | | | | | | | |
| Apply Prices to | All | Customer | AndBa | \sim | Barry Anders | son | | | |
| Dept ID | Prod ID | <product< td=""><td>Name></td><td>Quantity</td><td>Inv Units</td><td><price></price></td><td>Bill Units</td><td>Lot Numbe</td><td>Tech License Numl</td></product<> | Name> | Quantity | Inv Units | <price></price> | Bill Units | Lot Numbe | Tech License Numl |
| 1 CDek00 | D580 | DKC58-06 | RIB AF SS 80 | 240.000 | Bags | 208.15 | Bags | \sim | |
| | | | | | | | | | |
| < | | | | | | | | | > |
| Price Level List | t Price | ~ | Print Method | 1. No Roll | up | | | ~ | Total 24978.00 |
| | Tax | Apply Roll | ups Apply Dis | scounts | View Net P | rices | Additional Info | Save | Cancel |

| 🖳 Add A Sales O | rder | | | | | | | | |
|----------------------------|-----------|---|--------------|--------------|---------------|-----------------|-----------------|---------------|-------------------|
| Order Number | 52 | | | | | | | Terms (Non | e) ~ |
| Order Date | 11/18/202 | 4 | | | Offer Expires | s Date 12 | /16/2024 | Start Da | te _/_/ |
| Estimated Delivery Date | 04/14/202 | 25 🛄 | | | Paymen | t Date | ! | Expiration Da | te _/_/ |
| Order Type | Booking | \sim | | | Check N | umber | | | Processed |
| Status | Offered | \sim | | | | | | | |
| Comment | Spring Se | ed Order S | plit 50/50 | | | | | | |
| | | | | | | | | | |
| Apply Prices to | All | Customer | 239873 | \sim | Larry Baker | | | | |
| Dept ID | Prod ID | <product< td=""><td>Name≻</td><td>Quantity</td><td>Inv Units</td><td><price></price></td><td>Bill Units</td><td>Lot Numbe</td><td>Tech License Numl</td></product<> | Name≻ | Quantity | Inv Units | <price></price> | Bill Units | Lot Numbe | Tech License Numl |
| 1 CDek00 | D580 | DKC58-06 | RIB AF SS 80 | 240.000 | Bags | 218.15 | Bags | ~ | |
| | | | | | | | | | |
| < | | | | | | | | | > |
| Price Level List | Price | ~ | Print Method | 1. No Roll (| up | | | ~ 1 | Total 26178.00 |
| | Tax | Apply Roll | Apply Dis | scounts | View Net P | rices | Additional Info | Save | Cancel |

In this example, Customer 2 should pay \$218.15 per bag before discounts.

2. Select the Apply Discounts button to add Sales Order Discounts.

Note: Discounts are setup at Planning / Setup / Sales Order Discounts and are not the same as Payment Terms.

| 賠 Apply Pricing Disco | unts | | × |
|---|----------------------------------|----------------------------|-----------------|
| <discount nam<br="">1 ► Corn 6%</discount> | e> Quantity Rate 240.000 6.00 | Type Total\$ Per \$3,14 | Manu\$ |
| NOTE: a maximum of 5 p discounts can be applied sales order | ricing to each | | Apply OK Cancel |

The View Net Prices button displays the Net Price for each Product with the offered discounts taken into

account. This is the price displayed on the Invoice.

| Vi | iew | Sales Or | der Prices | For Customer | 239873 Larry | Baker | | | | | | ; |
|----|-----|----------|------------|--------------|--------------|----------|--------------|----------|-----------|-------------------|---------|---------|
| | | Dept ID | Prod ID | Product Name | Crop Code | Discount | DiscountType | Quantity | Net Price | Average Net Price | Split # | Split % |
| 1 | Þ | CDek00 | D5806 | DKC58-06RI | Corn | Corn 6% | Percent | 120.000 | 205.06 | 205.06 | 1 | 50.000 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | Done |
| | | | | | | | | | | | | Done |

- 3. After the offer is approved, enter a Booking to lock in the contract with each Customer. Agvance automatically rolls the Sales Order Discounts into the price. When adding a Booking, select the Customer.
- 4. Next, select the **Import Plans/Sales Orders** button. On the *Import Plans / Sales Orders for Booking* window, select the *Import selected customer's share only* option, then choose the Customer. Tag the Sales Order, and select **OK**.

| 🖳 Import P | 'lans / Sales O | rders for Bo | oking | #1200282 | | | | × |
|---|--|--|------------------------------------|----------------------|--|--|------|--|
| Plan Filter <customer> ☑ All plans</customer> | 239873 that include th | <pre><fiek customer<="" is="" pre=""></fiek></pre> | i ID> | s | Plan atus Offere | ~ d ~ | Crop | ~ |
| Import sele | ected custome | 's share only | / 23 | 9873 | ~ | | | Apply Filter |
| Cust ID 239873 239873 239873 239873 239873 239873 | Field ID South20 South20 Wire80 Wire80 Wire80 | Plan */A */B */A */B */C | Crop Whe Whe Corr Corr | eat eat n n | Comments Wheat Post (Wheat Sprin corn preplan UAN Sidedre Post Corn Ha | Chem Mix g Fertilizer ht chem ess arness Pro | gram | Total S 438.09 1481.6 2214.5 5072.84 1907.4 |
| 239873 239873 < Tag All Sales Orders | Wire80 Wire80 Un Tag All | */D */E | Corr Corr | 1 1 | Corn NH3 corn preplar | nt chem | | 3886.82 2214.5 ♥ > |
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Notice the discounts default from the Sales Order to the Booking.

| Add | l Booking #1200 | 0282 Custo | mer 1 of 1 | | | | | | | | | | X |
|---|---|-------------|---------------|------------|---------------------------------|-------------|--------------------|---------|---|----------------------|---------------|----------------|----|
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| (| Customer Name | Larry Baker | r | 1654. | .83 | 2262.63 | 0.00 | : | 25000 | | Start Date | | |
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5. Repeat Steps 3 and 4 from the *Recommended Method* for importing a Booking into a Delivery Ticket and then into an Invoice.