

Booking Contract Signatures

Last Modified on 10/12/2022 8:17 am CDT

Growers are able to sign Booking contracts from Grower360 or Customer. For more information on receiving notifications in SKY when a Booking Contract is ready for signature, see [SKY Notifications](#).

In Advance:

In order to use this feature, a Booking Contract Format must be established by selecting **Design Booking Contracts** on the A/R tab at *Accounting / Setup / Preferences*.

The screenshot shows the 'Bookings' settings panel. It contains several checkboxes and dropdown menus. The 'Design Booking Contracts' button is highlighted with a red box.

Option	Status
Print Location Heading on Bookings	Checked
Allow use of like products on bookings from other departments	Checked
Disallow voiding a paid booking	Unchecked
Import unpaid sales order terms	Unchecked
Only allow import of unprocessed approved sales orders	Unchecked
Exclude zero quantity items on booking documents	Unchecked
Disallow edit of a signed booking	Unchecked
Seller Signature Only From Logged In User	Unchecked
Terms Default	(None)
Expiration Date	(None)
Start Date	(None)
Design Booking Contracts	Button

- Selecting *Disallow edit of a signed booking* prevents any edits being made if the *Contract Signed* option is checked on the Booking before being saved.
- Choosing the *Seller Signature Only From Logged In User* automatically applies the signature of the user logged in rather than giving options of different Seller Signatures to apply to the contract.

The *Booking Contract Format* must have the *Seller Signature* and *Buyer Signature* options selected for the signature lines to display on the contract. If these options are not checked, neither are eligible for electronic signature.

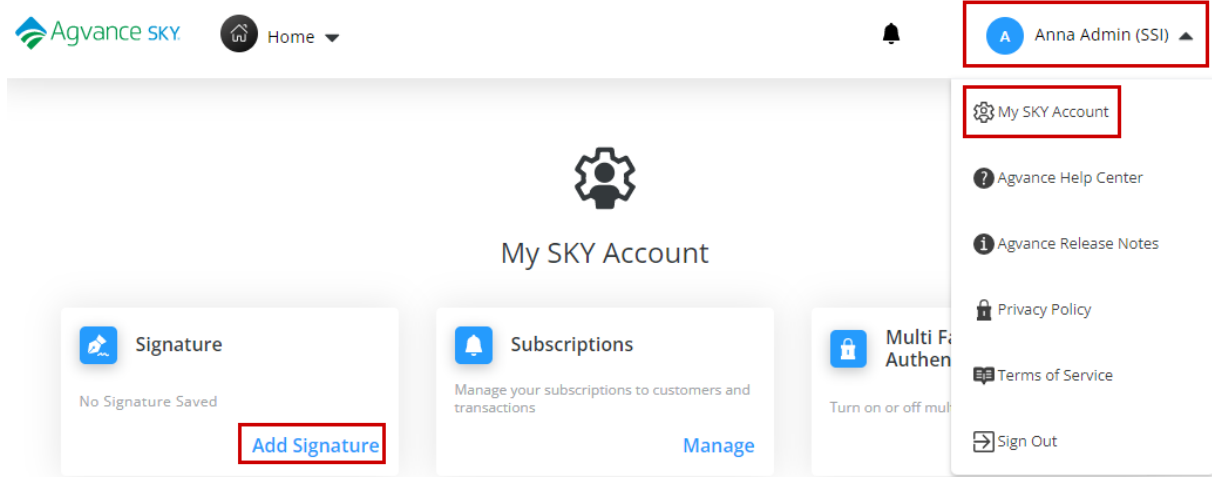
The screenshot shows the 'Data Printing Options' table. The 'Seller Signa...' and 'Buyer Sign...' rows are highlighted with a red box.

	Print	Data Element	Alternative Label
13	<input type="checkbox"/>	Product	
14	<input type="checkbox"/>	Price	
15	<input type="checkbox"/>	Total	
16	<input type="checkbox"/>	\$Paid	
17	<input type="checkbox"/>	Amt/Gal Paid	
18	<input checked="" type="checkbox"/>	Seller Signa...	
19	<input checked="" type="checkbox"/>	Buyer Sign...	

The Seller's signature will need to be established in SKY.

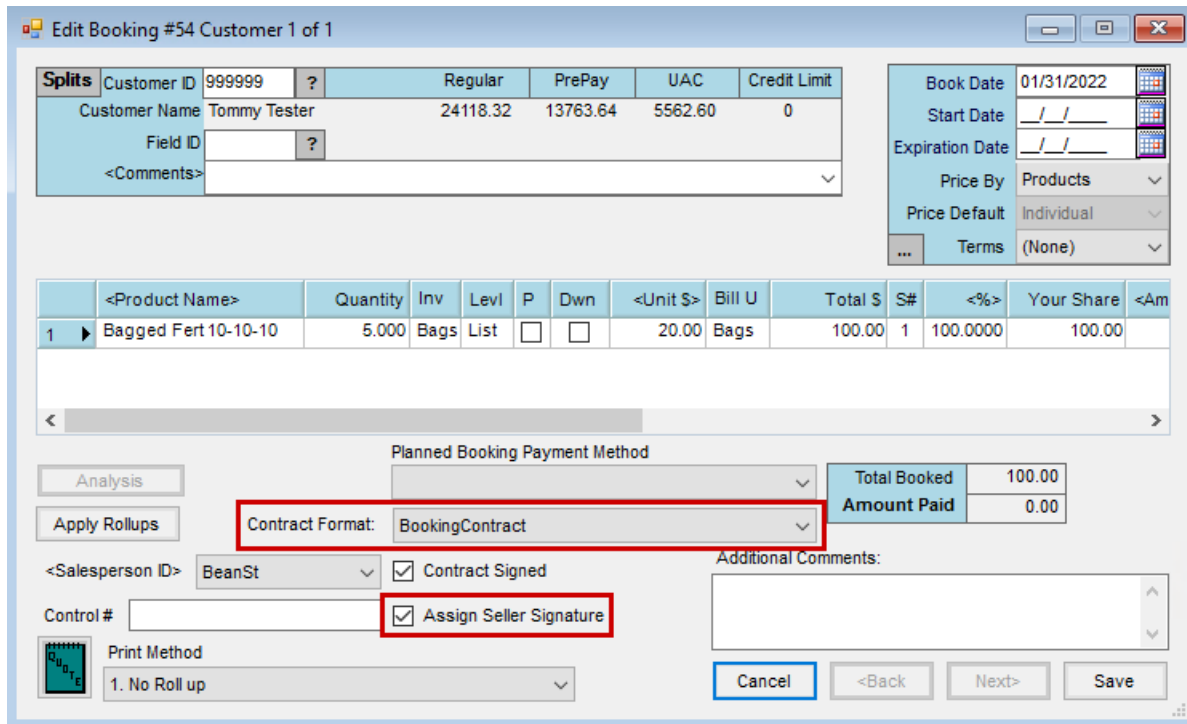
In SKY:

1. Select the User drop-down and choose **My SKY Account**.
2. Choose **Add Signature** on the *Signature* card.



In Agvance:

When entering a Booking in Agvance, it is required to have a *Contract Format* selected and to checkmark *Assign Seller Signatures* to apply signatures from Grower360 and Customer.



Once the Booking is saved with the *Contract Format* and Seller Signature, the Grower will receive a notification via email, text, and/or inside Grower360 (according to individual settings) indicating a Booking is ready for signature. For more information on receiving notifications, please see [SKY Notifications](#).

Booking #54 is ready to sign



stsky2@grower360.net
To

****External E-mail****

Booking #54 from company 'XXXXX' is ready to sign

[Sign Contract](#)

From within Grower or Customer the Grower will have the option to **Sign Contract** and **View Contract** by selecting the **Ellipsis**.

Once the contract has been signed by the Grower, the **Sign Contract** option will be removed from that menu and only **View Contract** will be available (along with the typical menu options).

Customer:

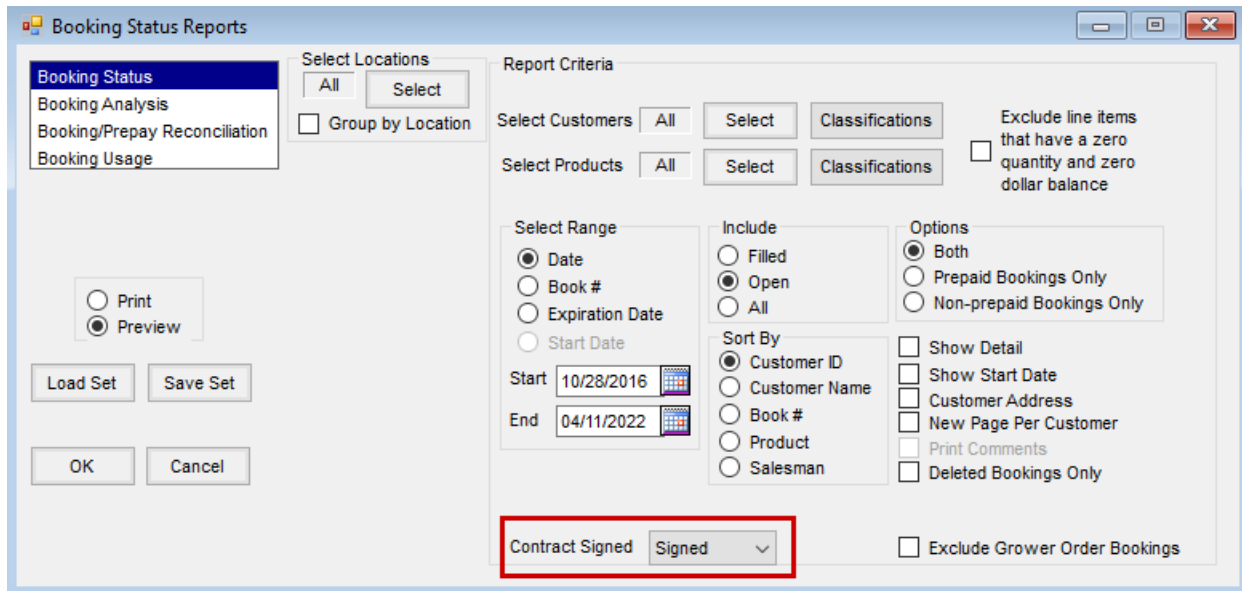
Booking #	Booking Date	Start Date	End Date	Book Value	Remaining	Prepay	User	
54	01/31/2022	None	None	\$100.00	\$100.00	\$0.00	1RE	...
...	View PDF
...	Download PDF
...	Void
...	Sign Contract
...	Download Contract

Grower360:

Bookings								Prepay
Filters	Search							
54	Booking Date 01/31/2022	Start Date --	End Date --	Booked Total \$100.00	Prepay Balance --	Status Unpaid	...	
...	View PDF	
...	Download PDF	
...	Pay Booking	
...	Sign Contract	
...	View Contract	

In Advance:

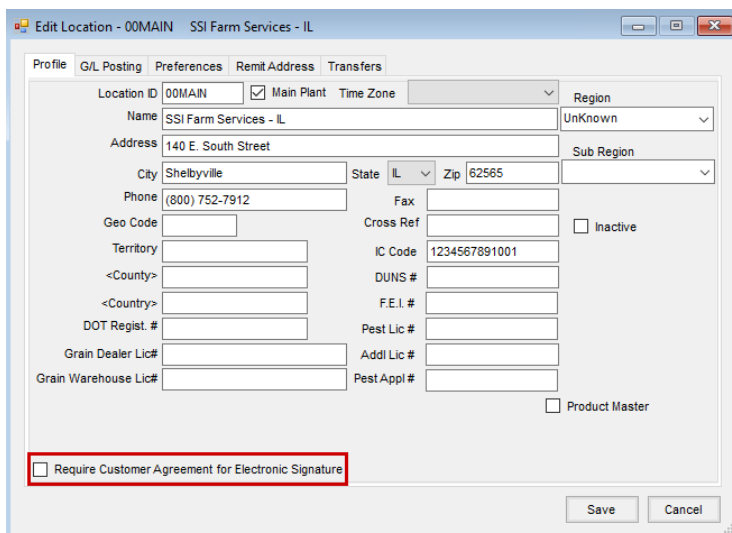
The Booking Status report gives the option to filter Bookings to see those that have been signed or are still unsigned.



Requiring Customer Agreements

Companies requiring customers to have an agreement on file to use Electronic Signatures can do so by setting the following preferences:

- **Require Customer Agreement for Electronic Signature** – This option can be found at *Accounting / Setup / Locations*.



Note: This step must be performed for each location allowed to sign electronically. If this option is selected, the *Apply User Signature to Contract* window will not display for customers without a signed agreement and

Classification.

- **Require Customer E-Signature Agreement** – Double-click in this field found on the *Customer* tab at *Hub / Setup / Company Preferences* to select the Customer Classification.

The screenshot shows a complex form with the following sections and fields:

- Customer Classifications:** Includes a dropdown for '<Default Classification>' and a red-bordered dropdown for '<Require Customer E-Signature Agreement>'.
- Customer Attributes:** Includes checkboxes for 'Auto ID' and 'Zero Pad'.
- Add Customer Setup:** Includes checkboxes for 'Auto ID' and 'Zero Pad'.
- Cross Reference:** A table with 4 rows and 2 columns. Row 1: PrgmID, Agvance ID. Row 2: GasboyAcct, Agvance ID. Row 3: Cross Ref3, Agvance ID. Row 4: Cross Ref4, (None). Includes a 'Check For Duplicates' checkbox.
- Ship To Cross Reference:** A table with 4 rows and 2 columns. Row 1: (empty), (empty). Row 2: (empty), (empty). Row 3: (empty), PO Ship To Source. Row 4: (empty), (None).
- Add Cash Customer Setup:** Includes checkboxes for 'Auto ID' and 'Zero Pad', and dropdowns for 'Salesperson' (Farbre), 'Credit Limit' (1000), 'Credit Status' (Good), 'Credit Date Opened' (Blank), '<Classification>', 'Default Terms' (None), and 'Check What Customer Address' (Address 1).
- Method to Check Sale of Restricted Products:** Warn Only (dropdown).
- Source of Customer Permit Checking:** Federal (dropdown).
- Duplicate Customer Checking:** Includes a dropdown for 'Elements' (None), a dropdown for 'Warning' (Warn Only), and a dropdown for 'Match Type' (Exact Match).

If the location is set to require a signed agreement AND the customer is in the classification selected, electronic signatures are allowed.