# Plans - SKY Order

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All Plans are displayed including the Plan Name, Date, Customer, Location, Field, and Status. Search for Plans by Plan Name, Date, Location, Customer, Field, Visible in G360, and Status.

Note: Plans must be enabled in SKY Admin before they can be viewed in SKY Order.

Select the **Ellipsis** on any Plan from the *Plans* tab and choose from the following:

- View Plan Select to view the Plan's Order and Product Details.
- Edit Plan Edit multiple areas of the Plan.
- Set Status to Blend This imports the Plan into a Blend Ticket, retaining all the Plan properties.
- View PDF Select to view a PDF copy of the Plan details.
- Download PDF Select to download a copy of the Plan details.
- Delete Select to permanently remove the Plan. Once deleted, a Plan cannot be recovered.

To batch edit Plans, select individual Plans or choose **Select All**. Choose the **Ellipsis** to *Change Approval Status*, *Change Grower360 Visibility*, or *Set Status to Blend*.

Additionally, choose to update the *Status* of a Plan by selecting the *Status* column of the Plan line and choosing from *Offered* or *Approved*.

Choose to mark a Plan as visible in Grower360 by setting the Visible in G360 column to Yes.

A new Plan can be added by selecting the blue**+ Add Plan** button in the lower right-hand corner. Use the navigation on the left to move to different sections of the Plan.



# Plan

Location

# Location

Template

- 1. Indicate the *Location* from the drop-down.
- 2. Optionally select a template from the *Template* drop-down.

Note: If adding a Plan from a Template, some Product information will default into the Plan.

## Field

 Select + Add Field. A grid of Fields displays. Use the Search field to find the specific Field or scroll through the list. A maximum of 50 Fields can be added to a Plan.

Field	l Search												
۹	Search											s	how Selected 1
Lo	cation	▼ Clas	sifications		Crop			Crop Year	r		Crop Chemi	stry	
★ 0     ●     ●     •     •													
_	Favorit 个	Custom 个	Custom 个	Farm ID 🛛 🛧	Farm De 个	Field Id 🛛 🛧	Field Na 个	Acres 🛧	Salesper 个	Crop Year  🛧	Crop 🛧	Crop Ch 🛧	Field Crop Info
		₹ Filter	₹ Filter	₹ Filter	₹ Filter	₹ Filter	₹ Filter	〒 Filter	₹ Filter	₹ Filter	₹ Filter	₹ Filter	
	*	AndBa	Barry Anders			SSE			Farbre				Field Cro
	*	AndBa	Barry Anders			All	All	10	Farbre				Field Cro
	*	AndBa	Barry Anders	SouthFar	South Farm	Long	Barrys East of lane	33.71	Farbre			-	Field Cro
	*	AndBa	Barry Anders	SouthFar	South Farm	East	Barrys East of Waterway	81.01	Farbre				Field Cro
~	*	AndBa	Barry Anders	AndFred	Fred Anders	BA-01	Behind Fred Anderson's House	97.98	Farbre	2023	Corn	-	Field Cro
	*	AndBa	Barry Anders	BarbWire	Barry's Wire	WireEast	Wire East	60.57	Farbre				Field Cro
	+	AndBa	Barry Anders	BarbWire	Barry's Wire	WireMid	Wire Middle	100.69	Farbre				Field Cro 💌
ltems p	er page 50	•										IK K	1 of 5 > >I
										🚯 A ma	iximum of 50 fields	may be selected	Select & Close

- 2. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Fields. The **Show Selected** button displays only Fields that have been checked for the Plan.
- 3. Check the Field(s) for the Plan, then choose Select & Close.
- 4. Fields can be removed by selecting the **Delete** icon.
- 5. The *Amount* and *Unit of Measure* default but can be changed if needed. Additionally, a Ship To can be selected from the drop-down on the first Customer if applicable. Ship Tos must first be set up on the Customer's file.
- 6. If needed, adjust the split percentages if there are multiple Customers on the Field(s).

Field Name Robind Fred Anderson's House	Amount	Unit of Measure ——		-
Benina Fred Anderson's House	97.98	Acres	•	-

Customer	Split 1 %	Pest	Spread	Ship To
Barry Anderson	50.0000	60.0000	100.0000	Ship To
Bob Cowgill	50.0000	40.0000	0.0000	

Add / Manage Field

# **Order** Details

Plan Name *		Approved	Show In Gro	wer 360	Brett Farve		×
	6 / 80				Could change depen	ding on company preferences	
- Ordered Date *	Ē	Start Date	Ē	End Date	Ē		
MM/DD/YYYY		MM/DD/YYYY		MM/DD/YYYY			
Billing Comments							
These comments will be visib	le to the cu	stomer.	0/80				
- Product Set * 00-BasicDry			Price By Products	•	Registration #		
						0 / 15	
Crop		Crop Chemist	ry	Placement			
Repacked Mir	ni Bulk	U AL	Custom App	lied			

- 1. Enter the Plan Name. If applicable, indicate the Plan is Approved and/or should Show In Grower360.
- The Salesperson defaults depending on the setting selected in SKY Admin under Order but can be adjusted. More information on this setting can be found here.
- 3. The Ordered Date defaults as today's date but can be changed. Optionally indicate the Start and End Dates.
- 4. Optionally enter brief Billing Comments that will be displayed to the Customer.
- 5. Indicate the *Product Set* from the drop-down.
- 6. Under the Price By drop-down, choose to price by Products, Blended Analysis, or Guaranteed Analysis.
- 7. If available, enter the *Registration #*.
- 8. The *Crop*, *Crop Chemistry*, and *Placement* drop-downs are all optional but can be helpful if this information is known.
- 9. Additional options of Repacked, Mini Bulk, VRT, and Custom Applied, are available.

# Products

Products can be added manually or via formulation.

**Note:** If an inactive Product has been added either manually or by formulating, the inactive Product name will display with a tooltip indicating the Product needs to be removed or the Product activated to save. If trying to save without removing the Product, a window will display requiring the Product to be activated or giving the option to go back and remove the Product. If multiple Products are inactive and not all should be activated, go back to the order, remove the Product that should not be activated, then choose Create Order again to view activate the needed Product(s).

#### Formulation

- 1. Indicate if formulating by *Lbs of Plant Food* or *Guaranteed Analysis*. If choosing *Guaranteed Analysis*, enter the *Lbs of Analysis*.
- 2. Select the appropriate Optimize By option from the drop-down.
- 3. Enter requested nutrients in the Ordered area.
- 4. Select Formulate then review the Calculated Analysis. To redo the formulation, select Clear Formulation and

#### re-enter the correct values.

#### Formulation

Formulate By

<ul> <li>Lbs of Pla</li> <li>Guarante</li> </ul>	ant Food eed Analysi	Lbs of Ana 100	lysis		Optimize By — List Price	•						
	Ν	Ρ	к	S	Ud	Ca	Mg	Zn	Fe	Mn	Cu	В
Ordered	28	0 0	) [ <sup>ĸ</sup>	S	Ud	Ca	Mg	Zn	Fe	Mn	Cu	В
Blended	28.000											
Guaranteed	46.000											
Clear Formu	lation	Formulate										

5. Additional Products can be added by selecting+ Add Product. See the Add Products Manually section below

for more details.

Add / M	Add / Manage Product								
						<ul><li>★ 1</li><li>Ø 0</li></ul>	t₁ Export ◄		
	Product	Prod ID	Department	Dept ID	Calculate By	Calculate By Amount	Rate / Unit	Total P	
:	Urea (46-0-0)	Urea	Dry Fert -00	DFrt00	Rate / Unit 👻	60.87	60.870 Lbs	5,964.0	
:	Dry Spreading	Dry	Applicatio	Appl00	Rate / Unit 👻	1.00	1.000 Acre	97.980	
		4						Þ	

6. The Products display in a grid below.

Add Products Manually

- 1. Select + Add Product.
- 2. A grid of Products displays. Use the Search field to find the appropriate Product(s) or scroll through the list.

Proc	duct Search											Show Selected
Loc	ation ain Plant	~	State F	Restrictions	Product St Active C	atus Dnly	Manufact	urer				
De	partment Category				Classifi	cations						
×	0 💿 0 🔭 Expo	ort										
	Product ID 个	Product Name	$\uparrow$	Department ID	$\uparrow$	Department Name	$\uparrow$	Units	$\uparrow$	On Hand	$\uparrow$	Active Ingredient
	⇒ Filter					⇒ Filter		⇒ Filter		⇒ Filter		
	0-0-62	0-0-62		LFrt00		Liquid Fert -00		Lbs		10,000		- 1
	10-30-0	10-30-0		LFrt00		Liquid Fert -00		Lbs		50,550		
	10-34-0	10-34-0		LFrt00		Liquid Fert -00		Lbs		70		- ,
ltems p	er page 50 ×										I< <	▶ 1 of 3 → →I
								6 A	maximum o	f 24 products may	be selected	Select & Close

- 3. The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Products. The **Show Selected** button displays only Products that have been checked for the Plan.
- 4. In the *Products* section of the Sales Order, indicate the *Quantity* for each Product.
- 5. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.
- 6. Choose + **Duplicate** to add another line of that Product.
- 7. The **Delete** icon can be selected to remove a Product line.

### Product Grid

Add / Manage Product

						★ 1	↑ Export •	
	Product	Prod ID	Department	Dept ID	Calculate By	Calculate By Amount	Rate / Unit	Total P
:	Urea (46-0-0)	Urea	Dry Fert -00	DFrt00	Rate / Unit 🔻	60.87	60.870 Lbs	5,964.0
H	Dry Spreading	Dry	Applicatio	Appl00	Rate / Unit 👻	1.00	1.000 Acre	97.980
		4						Þ

Recalculate

- 1. Under the Calculate By column, choose Rate/Unit, Total Product, or Blended.
- 2. Enter the *Calculate By Amount* for each Product then select **Recalculate**.
- 3. The *Exclude from Mix File* option can be selected for products that should not be sent to the automated blender. If the *VRT* checkbox was selected in the *Order Details* section, the *Mix Group* can be edited to indicate what should and should not be blended together.
- If applicable, a *Lot Number* can be selected from the drop-down.
   Note: Only existing Lot Numbers can be selected.
- 5. To add another line of the same Product, choose + Duplicate.

- 6. The **Delete** icon can be selected to remove a Product line item.
- 7. Review the totals below the *Products* grid.

Density	Lbs/Acre	Total Lbs	CuFt/Acre	Total CuFt	% Water	% Clay
60.000	60.870	5,960.000	1.015	99.450	0.000	0.000

8. To recalculate the Plan accommodating for water, filler, or carriers, choose an Adjust By option which is based on the Product Set selected for the Plan. Enter the Amount then select Adjust to update the Plan. Use the Carrier checkbox in the grid to identify which Product is the carrier.

## Adjust By

Adjust By Adjust Filler to CuFt/Acres	×	Amount	Adjust

# Pricing

#### Single Field

- 1. A *Payment Term* can be selected for the Field from the drop-down and will flow through to the Invoice. **Payment Terms** must first be set up in Windows Agvance.
- 2. For each Customer, choose the Lock Prices option (Offered, Analysis Offered, Quoted, Analysis Quoted, Do Not Lock).

Note: Quoting a Plan will carry the pricing from the Plan to the Invoice.

- 3. Under Price (\$)/Unit, select the Price Level from the drop-down. Alternately, enter a custom price then choose
  - + Add.

Behind Fred Anderson	's House	2/10 net 30			<		
Customer Name Barry Anderson			Quoted	•	3 Same Custor	Pricing for All ners	
Product Prod ID	Department Dept ID	Customer Split	Price (\$) / Unit		Customer Share		
Urea (46-0-0) Urea	Dry Fert -00 DFrt00	50.0000	600.00	/ Tons	\$894.00		
Dry Spreading Dry	Application -00 Appl00	100.0000	4.00	/ Acre	\$391.92		
Total Fert \$ Fertil	lizer Quantity Fer	t \$/Tons Tot	tal \$/Acres	Fert \$/Acres	Analysis	Total \$	Customer Share
\$1,788.00 5,960	0.00 Lbs 600	0.00 22.	.249	18.249	28-0-0	\$2,179.92	\$1,285.92

### **Multiple Fields**

1. A message is displayed in the Pricing section stating *Pricing for each field will be handled in the next step*. Choose **Save and Add Pricing**.

#### Pricing

Pricing for each field will be handled in the next step.

Notes	<b>^</b>
Cancel	Save and Add Pricing

2. The first Field displays with Batch and Individual Ticket Quantities available for review.

# Wire East

60.57	Acres	

Batch Quantities				Individual Ticket Quantities			
Product	Rate	Total Product	Blended Product	Product	Rate	Total Product	Blended Product
Urea (46-0-0)	60.870	13,808.360	13,810.000	Urea (46-0-0)	60.870	3,686.896	3,690.000
Dry Spreading	1.000	226.850	226.850	Dry Spreading	1.000	60.570	60.570

- 3. The first Customer on the Field is listed below the *Batch* and *Individual Ticket Quantities*. Here, the *Fert\$/Tons*, *Lock Prices*, and *Price* (\$)/Unit can be indicated.
- 4. Optionally Apply pricing to all Customers on this Field. The Same Customer pricing for this and remaining fields option is available for all Customers on the Field. The Same Customer pricing for this and remaining fields option gives the ability to set pricing on a Customer and have that pricing carry through for that Customer for the remaining tickets created within the batch. The Apply pricing to all Customers on this Field option applies the pricing set on the first Customer to all other Customers on that Field.

**Note:** The Apply pricing to all Customers on this Field and the Same Customer pricing for this and remaining fields options cannot be used at the same time.

- A Payment Term can be selected for the Field from the drop-down and will flow through to the Invoice.
   Payment Terms must first be set up in Windows Agvance.
- 6. If Permits or Tech Licenses are required on the order, they can be indicated at the bottom of the screen.

Fiel 60	d Quantity . <b>57 Acres</b>				2/10 net 30			×		
Ba	Apply pricir Apply pricir	ON ng to all Cus omer pricin	stomers on this Fie g for this and rema	ld ining field	Fert \$/Tons 600.00 s	e		Lock Prices	Lock +	D
	Product	Prod ID	Department	Dept ID	Customer Spli	t Price (\$) / Unit		Customer Share		
	Urea (46-0-0)	Urea	Dry Fert -00	DFrt00	50.0000	600.000	/ Tons	\$553.50		
	Dry Spreading	Dry	Application -00	Appl00	100.0000	4.000	/ Acre	\$242.28		
	Total Fert \$	Fertil	izer Quantity	Fei	rt \$/Tons	Total \$/Acres	Fert \$/Acres	Analysis	Total \$	Customer Share
	\$1,107.00	3,690	0.00 Lbs	60	0.00	22.276	18.276	28-0-0	\$1,349.28	\$795.78

#### Permits

No permits are required for the order

#### Tech Licenses

No Tech Licenses are required for products on this order.

7. Choose Cancel Remaining to cancels the transaction completely and return to the *Plans* page. Move to the next Field without editing pricing by selecting **Do Not Save Order for this Field**. No Plan is saved for that Field. To save pricing here and move to the next Field, choose Save & Next Field. This saves the Plan for that Field.

Note: Separate Plans are saved per Field rather than having a multi-Field Plan.

Cancel Remaining

Field 1 of 3 Do Not Save Order for this Field

Save & Next Field

8. On the last Field, **Save & Next Field** changes to **Save & Close**. This saves pricing on the current Field and finalizes the Plan with pricing saved on previous Fields in the Order. If **Skip Pricing for this Field** is selected on the last Field, pricing is saved on previous Fields where **Save & Next Field** was selected, and the last Field is not included in the Plan.

### Notes

Enter any Blend or Additional Comments.
 Note: Additional Comments are only visible to internal Users.



- 2. *Target Pests* can be selected from the drop-down.
- 3. The Plan can be saved by selecting **Create Order**. However, Permits and Tech Licenses can be added on the *Additional Info* tab.

# Additional Info

1. If only one applicable permit exists, it will be automatically selected. If the Customer has more than one

applicable permit, select the appropriate one from the drop-down.

Permits			
Grower Field Name Barry Anderson Behind Fred Anderson's House	Federal Permit Barry Anderson   45678900	•	No State Permits Available
Tech Licenses			

No Tech Licenses are required for products on this order.

- 2. Under Additional Info, the following fields are available.
  - Customer PO # This information can be entered if the Customer provides a Purchase Order number for the order.
  - Control Number This number is used to reference an internal control number (such as hand ticket numbers) associated with the Plan.
  - Authorized Agent This person is associated with the Customer who is authorized to make decisions.
     Agents are set up in the Customer file under Contacts.
  - Territory This defaults from the Customer setup and is optional information to be used as needed.
  - State This determines which counties are populated in the County drop-down.
  - County This defaults from the Ship To address. If none are set up, it defaults from the Field, and then from the Customer's setup. If there is more than one Customer on the ticket, it defaults to the settings for the first person listed.

- Ship Via Enter the method of shipment. The methods are defined at Hub / Setup / Ship Via.
- 3. In the *Applicator* grid, *Applicators/Vehicles/Acres* can be entered. Choose the **Delete** icon to remove the Applicator or + **Add Row** to include additional *Applicators/Vehicles*.
  - **Applicator** Applicators are set up at *Hub / Setup / Applicators*. The Applicator also imports into the Invoice in Agvance Accounting.
  - Vehicle Vehicles are set up at Hub / Setup / Vehicles and also import into the Invoice in Accounting.
  - Acres Enter the number of Acres for each Applicator involved.

# Edit a Plan

To edit a Plan, select find the Edit column and choose Edit for that Plan.

1. Under Order Details, update any information except for the Location.

The following are available for editing in this section:

- Salesperson
- Plan Name
- Crop
- Crop Chemistry
- Start Date
- End Date
- Approved
- Visible in Grower360
- Blend Comments
- Placement
- Custom Applied/VRT
- Application Details comments
- Target Pests
- Product Set
- Price By
- Additional Comments
- Billing Notes
- Area
- 2. In the Products section, add/remove products manually or via formulation.

The following are available for editing in this section:

- Formulate By
- Lbs of Analysis

(if Guaranteed Analysis is selected)

- Product Set
- Optimize By
- All quantities
- Pricing
- Carrier
- Exclude from Mix File
- Adjust by
- Lock Price options
- Fert \$/UOM
- Lock Prices
- 3. Once all edits are complete, select **Save Plan**.