

Overview Page - SKY Customer

Last Modified on 09/24/2024 1:33 pm CDT

Overview

See [SKY Customer Overview](#) for information on searching for Customers upon first opening SKY Customer.

The primary pane on the Overview page displays a quick view of a variety of account information.

The screenshot shows the 'Overview' page for a SKY Customer. At the top, there are navigation tabs: Overview (selected), Activity, Attachments, Classifications, Documents, and Statements. The main content area is divided into several sections:

- Customer Information:** Shows 'Active' status, CustID (AndBa), Address (2220 N 1000 Rd E Assumption, IL 62510), and Salesperson (Brett Farve).
- Contact Information:** Lists Phone 1 (217-226-2332) and Phone 2 (217-226-1256), each with 'Call' and 'Text' options.
- Customer Map:** A Google Map showing the location at 2220 N 1000 Rd E, Assumption, IL 62510.
- Credit Status:** Shows an 'Excellent' rating and 'AVAILABLE CREDIT' of \$40,447.00.
- Balances:** A table showing Regular (\$0.00), Prepay (\$1,590.00), Unapplied Cash (\$1,420.00), Budget Balance (\$0.00), and Budget Due (\$0.00). A 'View Unbilled Activity' button is present.
- Past Due Invoices:** Shows 'AMOUNT PAST DUE' of \$0.00 with a 'View Included Invoices' button.
- Sales by Month:** A bar chart showing sales for the current month (CURRENT) and previous months (AUG, JULY, JUNE, MAY, APR, MARCH, FEB, JAN, DEC, NOV, OCT, SEPT).
- Calculate Payments Due:** Shows 'Payment Date' (9/3/2024) and 'Due on or Before' (10/3/2024). It includes checkboxes for 'Include UAC' and 'Maximize Discounts'. The summary shows Net Due (\$0.00), Discounts Available (-\$0.00), UAC Applied (-\$1,420.00), and Payment Due (-\$1,420.00). A 'Make Payment' button is at the bottom.

- **Customer Information** – This is a view-only listing of the *Customer Status*, *Customer ID*, *Address*, and *Salesperson*.
- **Contact Information** – The phone number(s) for the customer display. If using a mobile device, tap **Call** or **Text** to contact the Customer.
- **Customer Map** – View the geocoded address for the customer. Google Maps functionality makes the map interactive.
- **Notes** – Notes set up in Agvance regarding the Customer are displayed.
- **Credit Status** – The *Credit Status* is established on the *Customer Profile* within Agvance.
- **Balances** – Total balance information is broken down by category:
 - **Regular** – This displays open Invoice totals. Selecting the amount opens the Invoices window.
 - **Prepay** – This displays open Booking totals. Selecting the amount will open the *Bookings* window.
 - **Unapplied Cash** – This displays total unapplied cash for the account. Selecting the amount expands the

line item showing the *Beginning Balance*, *Current Month Activity*, and the *Current Balance*.

- **Budget Balance** – This is the total Budget Balance for the account. Selecting the amount expands the line item showing the *Beginning Balance*, *Plus Monthly Budget Payments*, *Less Invoices for Delivery*, and the *Current Balance*.
- **Budget Due** – This shows total open Memo Invoices. Selecting the amount opens the *Memo Invoice* window.
- **Unbilled Activity** – This is the total dollars for Delivery or Blend Tickets not yet invoiced. Selecting the amount opens the *Activity* tab displaying any tickets that have not yet been invoiced.
- **Past Due Invoices** – Select a *Due on or Before* date to display past due Invoices. Choosing **View Invoices** opens a window listing the Invoices included in the selected criteria. Select the *Due on or Before* date option to filter the *Amt Past Due* information or to filter the Invoices listed when selecting **View Invoices**.
 - The *Selection* option on the *Search invoices* search bar is defaulted to *ON*. Invoices matching criteria from the *Past Due Invoices* card are selected but can be deselected by removing the checkmark per line item. Select the **Ellipsis** to *Select All* or *Deselect All*. Choosing **Pay Invoices** navigates to the *Add Payment* screen.
- **Sales by Month** – This displays overall sales by month for the past 12 months. Hover over the bar graph to see the total dollar amount of sales for that month.
- **Calculate Payments Due** – Quickly determine a payment due for the account by setting date parameters and toggling options. The *Payment Date* will filter payments due by the selected date. *Due on or Before* dates filter by the selected date. Optionally toggle the *Include UAC* and *Maximize Discount* options on or off. The *Net Due*, *Disc Available*, *UAC Applied*, and *Payment Due* information displays based on selected criteria.
 - Select **Make Payment** to navigate to the *Add Payment* screen. Invoices making up the *Net Due* amount on the card are automatically selected but can be changed.

Activity

A summary of the last 10 most recent activities displays on the *Activity* tab in Customer. Different information is available depending on the transaction type. Select the transaction number to navigate to where that specific transaction resides in Customer.

B Barry Anderson

Overview







Activity

Attachments

Classifications

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 Payment 135	Pay Date 09/12/2024	Amount \$25.00	Discount \$0.00	Total Credit \$25.00	Type Regular	User 1
 Payment 134	Pay Date 09/12/2024	Amount \$50.00	Discount \$0.00	Total Credit \$50.00	Type Regular	User 1
 Payment 133	Pay Date 09/12/2024	Amount \$100.00	Discount \$0.00	Total Credit \$100.00	Type Regular	User ssi
 PDO 4014	Order Date 09/10/2024	Due Date 09/10/2024	Tank SN 85975465		PDO Status --	User 1re
 Invoice 145	Invoice Date 09/10/2024	Due Date 09/15/2024	Original Amount \$750.00	Amount Due \$575.00	Invoice Status Open	User 1re
 Memo Invoice 26	Invoice Date 09/10/2024	Due Date 09/10/2024	Original Amount \$65.00	Amount Due \$65.00	Status Open	User 1re

From there, more information can be viewed by selecting the **Expand** button or additional options are available from the **Ellipsis** such as **View** or **Download PDF**.

Attachments

Any documents that have been attached to the Customer *Profile* in Agvance display. Choose the **Ellipsis** icon to **View Attachment** or **Delete Attachment**.

View Attachments must be turned on in SKY Admin per user for this tab to be visible.

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 File Name	Category	Subcategory	Comments		
AndersonBarry.docx	—	—	—		

Select the **Leaf** icon to **Send to Grower 360** or **Remove from Grower 360**. A blue leaf indicates the document is currently visible in Grower360.

Show Document in Grower360

Do you want this document to be available to users in Grower360?

[Cancel](#) [Send to Grower360](#)

The file will display in Grower360 in the *Resources* area.

The screenshot shows a sidebar with 'Overview', 'Resources' (highlighted), and 'Bookings'. The main content area is titled 'Resources' and contains a 'Documents' section. Below this is a table with the following structure:

File Name	Date	Category	Subcategory	Comments	
AndersonBarry.docx	—	—	—	—	⋮

Attachments can be uploaded by selecting the **+ Add Attachment** button in the lower right. Drag and drop a file to the upload area or select **browse** to find the appropriate file. The *Category*, *Subcategory*, and *Comments* fields are all optional. Once the file is uploaded and any additional information is added, choose **Add Attachment**.

Note: The only supported files to share with a Grower that will open on the native app are PDF, DOC, XLS, TXT, and CSV. Other formats will display on the desktop in addition to these listed.

The dialog box is titled 'Add Attachment for Barry Anderson'. It features a dashed border around the upload area with a cloud icon and the text 'Drag and drop here or [browse](#)'. Below this, a file 'Document.docx (0.02 MB)' is shown with a checkmark and 'Ready to upload' and a red 'X' icon. There are three text input fields: 'Category' (0 / 30), 'Subcategory' (0 / 30), and 'Comments' (0 / 100). At the bottom, there are 'Cancel' and 'Add Attachment' buttons.

Classifications

On the *Classifications* tab in SKY Customer, see the Classifications to which the Customer belongs.

 Barry Anderson

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Customer classification
2023Customers



Customer classification
2024Customers



Customer classification
Electronic Signatures

Documents

The *Documents* tab in Customer provides the Grower Summary Report after it has been run in Agvance and sent to the Grower to assist Growers with any questions. Additional documents can also be added and optionally shown in Grower360.

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File Name
Grower Summary Report

Date
01/15/2024

Comments
Grower Summary



File Name
Document.docx

Date
01/30/2024

Comments
—



The Leaf icon, when filled in as seen below, indicates the the document is visible to Growers.

Note: When the Leaf icon is filled in with **black**, this means the document is ALWAYS visible to the Grower. The only way to keep the Grower from seeing this document is to delete the file. If filled in with **blue**, the document can optionally be shared with the Grower. Selecting the icon gives the option to show/hide the document in Grower360. Once hidden, the icon will be an outline rather than filled in to indicate it is no longer being displayed in Grower360.

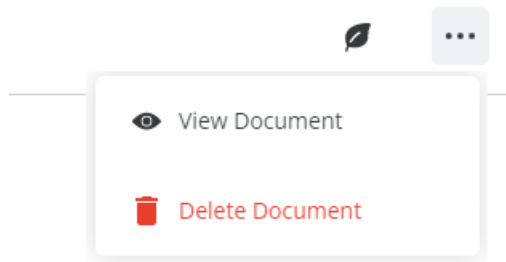
Hide Document in Grower 360

Do you want this document to be unavailable to users in Grower 360?

Cancel

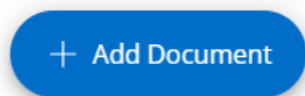
Hide from Grower 360

Selecting the **Ellipsis** gives the options to view the document in a separate tab or to remove the document from this area.

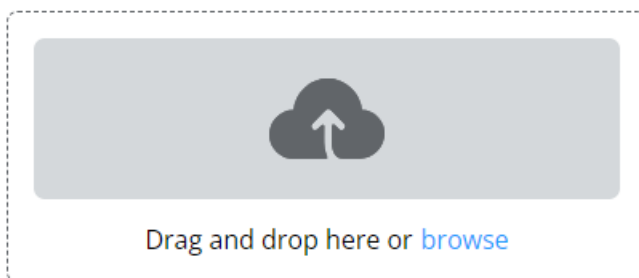


Adding Documents

Documents can be added by selecting the + icon in the bottom right.



1. Drag and drop the document in the designated area or select **browse** to locate the appropriate document.



2. Optionally enter a *Category*, *Subcategory*, and any *Comments*.

0 / 30







0 / 30

0 / 100

3. Select **Add Document** to finish the process or **Cancel** to return to the *Documents* tab.
4. Upon adding and choosing to make the document visible, it will be available in Grower360.

Resources

Documents

	File Name	Date	Category	Subcategory	Comments	
	Grower Summary ...	01/15/2024	—	—	Grower Summary	
	Document.docx	01/30/2024	—	—	—	

Statements

Invoice and Budget Statements are available on the *Statements* tab. Selecting the **Download** icon gives the option to view or download the statement as a PDF. Additionally, if using the *Send statements to Grower* option on the Combo and Budget Billing Statements, those will display here as well.

Overview





Activity

Attachments

Documents

Statements

Invoice Statements

	Statement Date Jan 31, 2024	
	Statement Date Dec 31, 2023	

Budget Statements

	Statement Date Dec 31, 2023	
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