Sales Orders - SKY Order

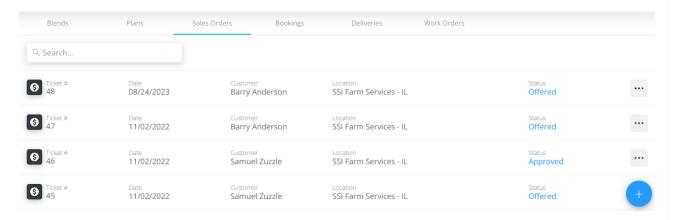
Last Modified on 09/24/2024 10:42 am CDT

All Sales Orders are displayed including the Ticket #, Date, Customer, Location, and Status.

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

Select the **Ellipsis** icon for any Sales Order to *Edit Sales Order*, *View PDF*, *Download PDF*, or choose *Delete* to permanently remove that Sales Order. Once deleted, the Sales Order cannot be recovered.

For Sales Order Contracts, a Download Contract option is available under the Ellipsis.

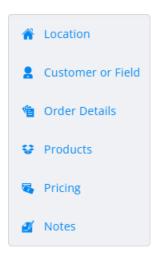


Add/Edit a Sales Order

Sales Orders can be added by selecting + Add Order at the bottom right corner of the page then choosing + New as Sales Order. To edit an existing Sales Order, choose the Ellipsis then select Edit Sales Order.

Note: If editing an existing Sales Order, the *Location* and *Customer or Field* information cannot be modified other than adding a *Ship To* if applicable.

Use the navigation on the left to move to different sections of the Sales Order.



Sales Order

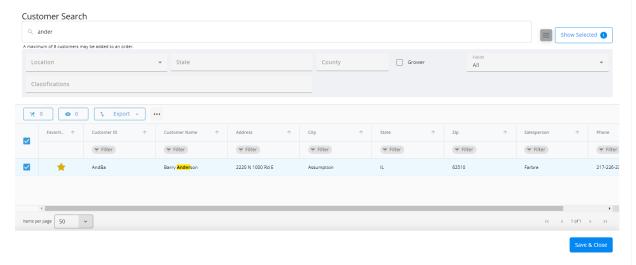
Location

1. Select the Location for the Sales Order.



Customer or Field

1. Under *Customer or Field*, choose + Add Customer or + Add Field. A grid of Customers (or Fields) displays. Use the *Search* field to find the specific Customer or scroll through the list. A maximum of eight Customers may be added. If adding by Field, only one Field can be selected. The Filters button to the far right of the *Search* bar can be used to narrow down the list of Customers.



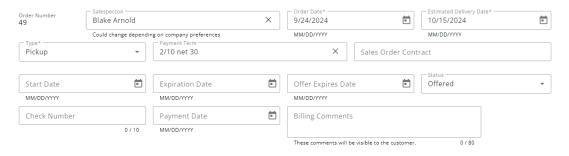
- 2. The **Show Selected** button next to the *Search* bar is enabled after choosing the Customer(s). The number indicates how many Customers are currently checked. Selecting the button filters the grid to show only the selected Customers.
- 3. Once the Customers are selected, choose Save & Close.
- 4. A Ship To can optionally be added if applicable.

Customer or Field



Order Details

- 1. The Order Number will default once the Location has been selected.
- 2. The Salesperson defaults as the Salesperson selected on the User profile in SKY Admin but can be adjusted.
- 3. The Order Date automatically displays today's date but can be modified if needed.



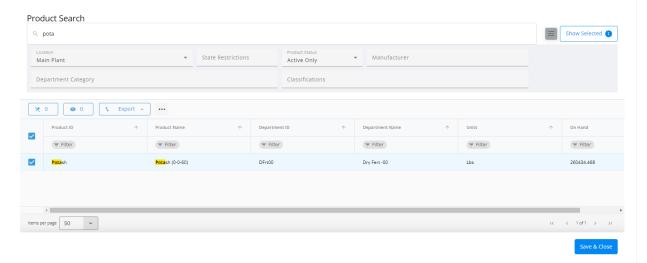
- 4. Indicate the Estimated Delivery Date.
- 5. Choose the Type from the drop-down Pickup, Deliver, or Booking.
- 6. Optionally select a *Payment Term* and/or a *Sales Order Contract* for this Sales Order from the respective drop-downs.
- 7. The Start, Expiration, and Offer Expires Dates are optional entries but can be helpful if populated.
 - Expiration Date This defaults from the Sales Allocation, if selected. If this order is imported to a
 Booking, this Expiration Date imports into the Booking Expiration Date.
 - Offer Expires Date This is used on Sales Orders with an Offered status. Populating this date helps keep some preferences true at Planning / Setup / Location Preferences on the Sales Order Prefs tab. If the Offer Expires date passes and the preference is set to Disallow Approval of an Expired Sales Order, the Status option of Approved will become disabled. However, expired Sales Orders can still be imported into a Booking if it was approved prior to that date. This date prints on the Sales Order.
- 8. Select the Status drop-down to choose Offered, Approved, or Declined. This will sync with Windows Agvance.
- 9. If applicable, enter the Check Number. This is limited to 10 characters.
- 10. The Payment Date is an optional field.

Products

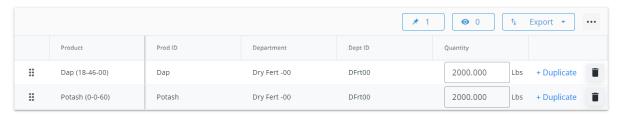
1. Select + Add Product.

2. A grid of Products displays. Use the *Search* field to find the appropriate Product(s) or scroll through the list.

The **Filters** button to the far right of the *Search* bar can be used to narrow down the list of Products.



- 3. The **Show Selected** button next to the *Search* bar is enabled after selecting the Product(s). The number indicates how many Products are currently checked. Selecting the button filters the grid to show only the selected Products.
- 4. Once the Products are selected, choose Save & Close.
- 5. In the Products section of the Sales Order, indicate the Quantity for each Product.



- + Add Product
- 6. Products can be reordered by selecting the grid of dots on the left and dragging to the appropriate position.
- 7. Choose + Duplicate to add another line of that Product.
- 8. The **Trash Can** can be selected to remove a Product line.

Pricing

1. In the Pricing section, indicate the Price (\$) / Unit for each Product.

Customer Name Total Barry Anderson \$786.37

Product	Prod ID	Department	Dept ID	Customer Split	Price (\$) / Unit	Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	100.0000	411.37	\$411.37
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	100.0000	375.00 / Tot	\$375.00

Notes

1. Additional Comments can be entered in the Notes section.

Note: A maximum of 240 characters are allowed in this field.

2. After *Notes* are entered, **Create Order** can be selected but additional options are available on the *Additional Info* and *Discounts* tabs.

Additional Info and Discounts Tabs

Additional Info

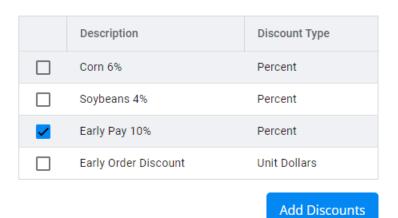
Optionally enter a Customer PO #, Control Number, and/or Territory.



Discounts

Discounts already set up in Agvance display on this tab. A maximum of five pricing discounts can be applied to a Sales Order.

1. Check any of the applicable discounts and select Add Discounts.



2. An *Active Discounts* section displays to indicate the *Rate* for the Discount. To remove the Discount, select the **Trash Can**.

Discount Name	Quantity	Rate	Туре	Total Discount	
Early Pay 10%	0.000	10.00	Percent	\$0.00	Î

3. Once all of this information is added, choose Create Order.