Bookings - SKY Order

Use the *Search* field to search for Bookings by *Ticket* number, *Date*, *Customer*, or *Location*. Select the **Ellipsis** icon to *View Booking*, *Edit Booking*, *View PDF*, *Download PDF*, or *Void*.

Booking Contracts have *Sign Contract* and *Download Contract* as additional options under the **Ellipsis**.

Note: In Agvance, a *Contract Format* must be selected on the Booking before saving for these options to be available.

Selecting **Sign Contract** opens the contract to review. Select **Sign Contract** again to have the Customer sign the contract, then choose **Accept**.

Add/Edit a Booking

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

Note: If editing an existing Booking, the *Location* and *Customer or Field* information cannot be modified.

Booking

Location

Select the *Location* for the Booking.

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 to a Booking. 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.

Customer Search

	Favorit... ↑	Customer ID ↑	Customer Name ↑	Address ↑	City ↑	State ↑	Zip ↑	Salesperson ↑	Phone
		☰ Filter	☰ Filter	☰ Filter	☰ Filter	☰ Filter	☰ Filter	☰ Filter	☰ Filt
☑	★	AndBa	Barry Anderson	2220 N 1000 Rd E	Assumption	IL	62510	Farbre	217-226
☐	★	HamHe	Helen Hammond	1772 N. Pine Street	Shelbyville	IL	62565	BeanSt	217-774
☐	★	3JohTo	Thomas Johnson	--	Decatur	IL	62522	ArnBla	815-222

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A maximum of 8 customers may be selected   Select & Close

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 **Select & Close**.

4. Optionally update the *Split %*. The **Delete** icon removes the Customer.

Field Name
Behind Fred Anderson's House

Acres
97.98

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

Order Details

1. Plans can optionally be imported into the Booking. Choose **Import Plan**, then search for Plans or scroll through the table to find and check the appropriate Plan(s). Splits, Payment Terms, Products, and Pricing will automatically be populated. Once Plans are checked, choose **Select & Close**.

   Note: Searching for Plans will reset selected Plans.

Import Plan

	Plan Na...	Plan Id	Area Id	Locatio...	Location	Date	Custom...	Custom...	Field Id	Field	Crop	Status	Previou...
☐	G	G	All	00MAIN	SSI Farm Se...	09/06/2024	AndBa	Barry Ander...	East	East Barrys ...	--	Offered	No
☑	A	A	All	00MAIN	SSI Farm Se...	05/29/2024	AndBa	Barry Ander...	WireMid	WireMid Wir...	--	Offered	No
☐	H	H	All	00MAIN	SSI Farm Se...	08/03/2023	AndBa	Barry Ander...	BA-01	BA-01 Behin...	Corn	Offered	No
☐	Dry Fert	F	All	00MAIN	SSI Farm Se...	06/29/2023	AndBa	Barry Ander...	East	East Barrys ...	Corn	Offered	No
☐	Dry Fert	G	All	00MAIN	SSI Farm Se...	06/29/2023	AndBa	Barry Ander...	BA-01	BA-01 Behin...	Corn	Offered	No
☐	Dry Fert	E	All	00MAIN	SSI Farm Se...	06/29/2023	AndBa	Barry Ander...	East	East Barrys ...	Corn	Offered	No
☐	Dry Fert	E	All	00MAIN	SSI Farm Se...	06/29/2023	AndBa	Barry Ander...	Long	Long Barrys...	Corn	Offered	No
☐	Dry Fert	F	All	00MAIN	SSI Farm Se...	06/29/2023	AndBa	Barry Ander...	BA-01	BA-01 Behin...	Corn	Offered	No

2. Under *Import Options*, one Customer's share of a Plan can be imported by selecting *Import selected customer's share only* and indicating the Customer from the drop-down. Optionally choose *Do not combine like products*. Select **Import Plans**.

3. Upon choosing **Import Plans**, a progress window displays. Once the Plans are imported successfully, the message changes to indicate selected plans have been imported. If there is a split conflict, choose the appropriate split. Select **Continue Import**.

4. A confirmation will display to indicate the Plan was imported successfully. Choose **Continue Import** again.

Import Plans

✅ Fields imported

✅ Order Details imported

✅ Products & Pricing Imported

<div align="center">Cancel Import   Continue Import</div>

5. The *Order Number* will default once the Location has been selected.

Order Details ▲

⬇ Import Plan

Ticket Number	Ticket Date *	Start Date	Expiration Date
97	8/29/2025 📅	📅	📅
	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY

Salesperson		Payment Term	Booking Contract	
Blake Arnold	✕		BookingContract	✕

Could change depending on company preferences

Seller Signature	
Robert Ellis	✕

Billing Comments

These comments will be visible to the customer.   0/80 characters

6. The *Ticket Date* defaults with today's date but can be modified if needed.

7. Optionally enter a *Start* and *Expiration Date* for this Booking.

8. The *Salesperson* defaults based on the setting selected in **SKY Admin**.

9. A *Payment Term* can optionally be applied to the Booking by selecting the appropriate Term from the drop-down.

   Note: Payment Terms must first be set up at *Hub / Setup / Payment Terms*.

10. A *Booking Contract* can also optionally be selected from the drop-down.

    Note: Booking Contracts must first be set up in Agvance by selecting **Design Booking Contracts** at *Accounting / Setup / Preferences* on the *A/R* tab.

11. If the *Seller Signature Only From Logged In User* option is checked at *Accounting / Setup / Preferences* on the *A/R* tab, the Seller Signature will populate automatically with the name of the User currently logged in to SKY. If this preference is not enabled, a Seller Signature can be selected.

12. If applicable, *Billing Comments* can be entered and will be visible to the Customer.

Products

If a Plan was imported in the *Location* section, Products and their quantities will default from the Plan(s) selected. If this is the case, review the Products and amounts.

	Product	Prod ID	Department	Dept ID	Quantity				
⠿	Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	6,000.000	Lbs	+ Duplicate	🗑
⠿	Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	6,500.000	Lbs	+ Duplicate	🗑

+ Add Product

To make changes, follow the steps below. If no changes are needed, move on to the *Pricing* section.

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.

Product Search

🔍 potash   ▦ | Show Selected

Location Main Plant ▾	State Restrictions	Product Status Active Only ▾	Manufacturer
Department Category		Classifications	

📌 0 | 👁 0 | ↑↓ Export ▾ | ⋯

☐	Product ID ↑	Product Name ↑	Department ID ↑	Department Name ↑	Units ↑	On Hand ↑	Active Ingredient
	⯀ Filter	⯀ Filter	⯀ Filter	⯀ Filter	⯀ Filter	⯀ Filter	⯀ Filter
☐	Potash	Potash (0-0-60)	DFrt00	Dry Fert -00	Lbs	260,434.468	--

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Select & Close

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 **Select & Close**.

5. In the *Products* section, indicate the *Quantity* for each Product.

📌 1 | 👁 0 | ↑↓ Export ▾ | ⋯

	Product	Prod ID	Department	Dept ID	Quantity				
⠿	Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	6,000.000	Lbs	+ Duplicate	🗑
⠿	Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	6,500.000	Lbs	+ Duplicate	🗑

+ 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 **Delete** icon can be selected to remove a Product line.

Pricing

If a Plan was imported under the *Location* section, pricing information will default from the Plan(s) selected. If this is the case, review the *Price ($) / Unit* per Product/Customer.

If this is the case, review the Products and amounts. To make changes, follow the steps below. If no changes are needed, move on to the *Notes* section.

1. The *Price ($) / Unit* column can be changed as needed. A price can be entered or a Price Level can be chosen from the drop-down.

Customer Name
Barry Anderson

Total
$1,492.50

Planned Payment Method

☐ Same Pricing for All Customers

Product	Prod ID	Department	Dept ID	Customer Split	Price ($) / Unit		Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	60.0000	450.00	/ Tons	$810.00
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	60.0000	350.00	/ Tons	$682.50

Customer Name
Bob Cowgill

Total
$995.00

Planned Payment Method

Product	Prod ID	Department	Dept ID	Customer Split	Price ($) / Unit		Customer Share
Dap (18-46-00)	Dap	Dry Fert -00	DFrt00	40.0000	450.00	/ Tons	$540.00
Potash (0-0-60)	Potash	Dry Fert -00	DFrt00	40.0000	350.00	/ Tons	$455.00

Note: If keying in a price, choose *Add "$"* from the drop-down.

372

No results found

+
Add "372"

2. Checking the *Same Pricing for All Customers* option applies the pricing for the first Customer to all other Customers in the split.
3. The Planned Payment Method can be selected from the drop-down if these are set up at *Accounting / Setup / A/R / Booking Payment Methods*.

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 Tech License information is available on the *Additional Info* tab.

Additional Info

Tech Licenses

For Products that are a part of a Technology Group, the appropriate *Tech License* can be selected from the drop-down. If only one tech license is available, it will automatically be applied and the drop-down will be disabled.