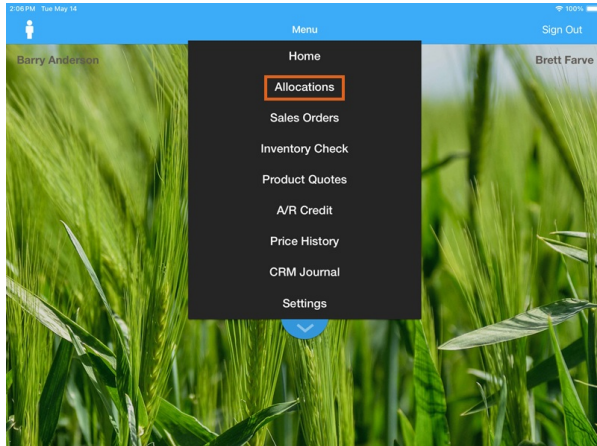


Sales Allocations for Mobile Sales

Last Modified on 05/16/2024 8:37 am CDT

To create a Sales Order from an existing Sales Allocation, select the *Allocations* menu option from the *Menu* dropdown.



The first window displays the current Sales Allocations with the corresponding statuses. In the example below, the DKC37-12 Allocation has a price of \$90.00 per bag with a total quantity of 5,000 bags. There are currently 120 bags with an *Offered* status and 60 bags in the *Approved* status. Based on the *Original* Allocation of 5,000 bags and 60 bags in the *Approved* status, the *Net Available* is 4,940 bags.

A screenshot of the 'Allocations' window in the mobile application. The window has a blue header with a user icon, the name 'Barry Anderson', and a 'Sign Out' button. Below the header is a table with the following columns: Product Name, Unit Price, Bill. Units, Original, Offered, Approved, Net Available, and Inv. Units. The table contains five rows of data. The row for 'DKC37-12' is highlighted with an orange border. The data in the table is as follows:

Product Name	Unit Price	Bill. Units	Original	Offered	Approved	Net Available	Inv. Units
ESN Urea (44-0-0)	\$400.00	Tons	150	22	0	150	Tons
Urea (46-0-0)	\$400.00	Tons	200000	150000	0	200000	Lbs
Dap (18-46-00)	\$410.00	Tons	25000	0	0	25000	Lbs
Aatrex 4L	\$17.00	Gal	500	0	100	400	Gal
DKC37-12	\$90.00	Bags	5000	120	60	4940	Bags

A Sales Order can be created by selecting an Allocation. The *Allocation Details* window appears. Tap **Create Sales Order** to start the Sales Order.

2:06 PM Tue May 14 100%

Allocation Details

Barry Anderson

Product Name	Allocation #	Product ID	Quantity	Billing Unit	Price
DKC37-12	3	DKC37120	5000.000	Bags	\$90.00

Storage Location: Allocation Start Date: 05/01/2024
 Ref #: Allocation Expiration Date: 05/31/2024

Create Sales Order

Amounts for DKC37-12

120.000 Bags Offered	60.000 Bags Approved	4940.000 Bags Available
-------------------------	-------------------------	----------------------------

Because the Product and price associated with the Sales Allocation is known, it defaults into the corresponding area. The amount of Product for the order can be entered. To save this information and continue to fill in other information for the Sales Order, tap the **Checkmark**.

2:07 PM Tue May 14 100%

Product Price & Quantity

DKC37-12 Price History

Product ID: DKC37120 Dept ID: CornM

Pricing Levels:

List Price	\$98.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00

Customer Quote:

AndBa, Barry Anderson

Margin %

Price

Billing units: Bags

Quantity

Inventory Units: Bags

Allocation: 3

Price: 90.00

Total: 5000.000 Bags

Offered: 120.000 Bags

Approved: 60.000 Bags

Available: 4940.000 Bags

Booking Start Date: 05/01/2024

Booking End Date: 06/30/2024

Fill in other appropriate information to complete the Sales Order, and select the **Checkmark** to save.

2:08 PM Tue May 14 100%

Sales Order - New ✓

Terms: (None) ☰ Order Type: Booking ☰ Status: Approved ☰ PO#: <input type="text" value="PO# --"/> FieldID: (i) ☰ Cust: AndBa, Barry Anderson ☰ Ship To: ☰	Order Date: 05/14/2024 Est. Delivery: 06/24/2024 📅 Offer Expires: 📅 Start Date: 05/01/2024 📅 Exp. Date: 06/30/2024 📅 Create Unloaded Delivery Ticket <input type="checkbox"/>
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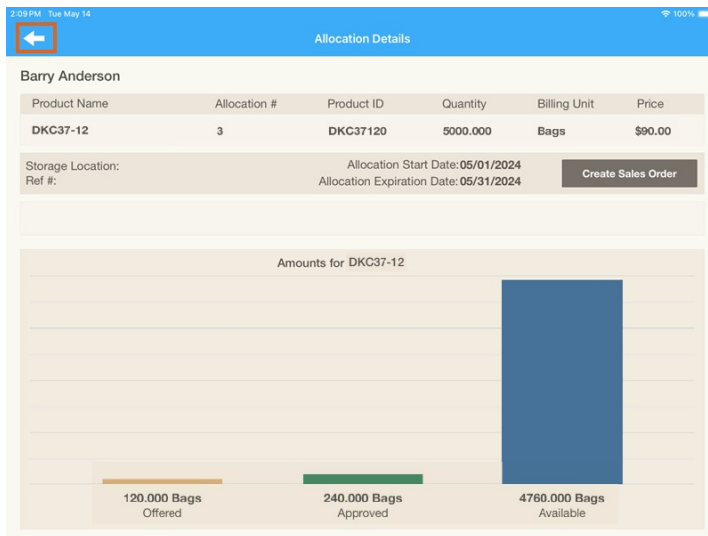
+ Add Product

View Terms
Split

Apply Discounts
Apply Tax
View Net Prices

DKC37-12	180.000 Bags @ \$90.00 / Bags	\$16,200.00
Prod ID: DKC37120 Dept ID: CornM Alloc: 3		
Total:		\$16,200.00

After the Sales Order has been saved, the *Allocation Details* window appears with the updated information. Tapping the **Back Arrow** returns to the previous graph view of the Allocation statuses.



Now that a Sales Order has been created with an *Approved* status of 180 bags of DKC37-12, the *Approved* column displays 240 bags (60 *Approved* bags prior to this Sales Order being saved plus 180 *Approved* bags with the new Sales Order equals 240 bags).

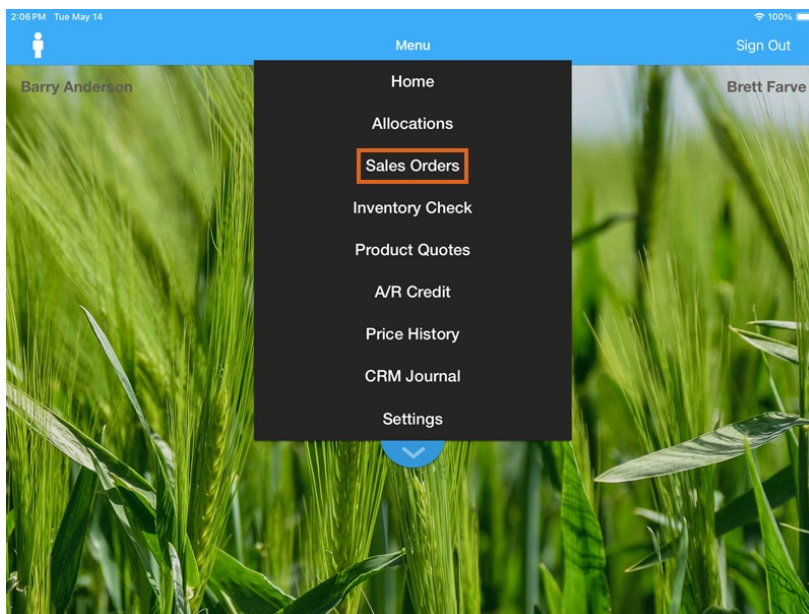
2:06 PM Tue May 14

Allocations

Barry Anderson

Product Name	Unit Price	Bill. Units	Original	Offered	Approved	Net Available	Inv. Units
ESN Urea (44-0-0)	\$400.00	Tons	150	22	0	150	Tons
Urea (46-0-0)	\$400.00	Tons	200000	150000	0	200000	Lbs
Dap (18-46-00)	\$410.00	Tons	25000	0	0	25000	Lbs
Aatrex 4L	\$17.00	Gal	500	0	100	400	Gal
DKC37-12	\$90.00	Bags	5000	120	240	4760	Bags

To create a Sales Order without first reviewing the Allocations, select the *Sales Order* option from the *Menu*.



Existing Sales Orders for the Customer previously selected display. To add a new Sales Order, tap the + symbol.

2:09 PM Tue May 14 Sales Orders 100%

Barry Anderson Processed: NO Status: All

Order #	Order Date	Delivery Date	Field ID	Processed	Status
47	05/14/2024	06/24/2024		NO	Approved
46	05/14/2024	06/24/2024		NO	Offered
45	05/14/2024	06/24/2024		NO	Approved
12	02/28/2024	04/30/2024		NO	Offered
9	02/28/2024	03/31/2024		NO	Offered

Tap **Add Product** to add a Product and fill in the appropriate information. Select the **Checkmark** when finished to add the Product information to the Sales Order.

2:10 PM Tue May 14 Product Price & Quantity 100%

DKC37-12 Product ID: DKC37120 Dept ID: CornM Price History

Pricing Levels:	AndBa, Barry Anderson
List Price 98.00	Margin % <input type="text"/>
0.00	Price <input type="text" value="90.00"/>
0.00	Billing units: Bags
0.00	Quantity <input type="text" value="48"/>
0.00	Inventory Units: Bags
0.00	Allocation: 3
0.00	Price: 90.00
0.00	Total: 5000.000 Bags
0.00	Offered: 120.000 Bags
0.00	Approved: 240.000 Bags
0.00	Available: 4760.000 Bags
Customer Quote:	Booking Start Date: 05/01/2024
	Booking End Date: 06/30/2024

Complete additional information for the Sales Order. Tap the **Checkmark** to save.

2:11 PM Tue May 14 100%

Sales Order - New ✓

Terms: (None)	Order Date: 05/14/2024
Order Type: Booking	Est. Delivery: 06/24/2024
Status: Offered	Offer Expires:
PO#: PO# --	Start Date: 05/01/2024
FieldID:	Exp. Date: 06/30/2024
Cust: AndBa, Barry Anderson	Create Unloaded Delivery Ticket <input type="checkbox"/>
Ship To:	+ Add Product

View Terms Split

Comments

Apply Discounts Apply Tax View Net Prices

DKC37-12	48,000 Units @ \$90.00 / Bags	\$4,320.00
Prod ID: DKC37120 Dept ID: ComM Alloc: 3		
Total:		\$4,320.00

The Sales Orders window displays for the selected Customer with current Sales Orders.

2:11 PM Tue May 14 100%

Sales Orders +

Barry Anderson Processed: NO Status: All

Order #	Order Date	Delivery Date	Field ID	Processed	Status
48	05/14/2024	06/24/2024		NO	Offered
47	05/14/2024	06/24/2024		NO	Approved
46	05/14/2024	06/24/2024		NO	Offered
45	05/14/2024	06/24/2024		NO	Approved
12	02/28/2024	04/30/2024		NO	Offered
9	02/28/2024	03/31/2024		NO	Offered

Sales Allocations for Agvance Planning

Refer to the [Using Sales Allocations](#) document for more information on Sales Allocations within Agvance.