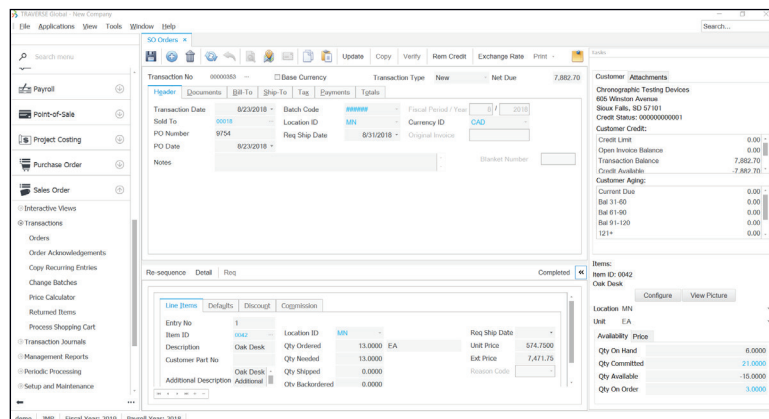# Sales Order

Successful selling is dependent on access to key information about your customers and the products you offer. Traverse Sales Order gives you the tools you need to keep your customers happy by handling their orders promptly and efficiently.

With Sales Order, you have inventory quantities and backorder information at your fingertips so you'll know exactly what is ordered and when it will ship. And, you can print an invoice or picking slip on demand with just a click.

You can look up order details based on customer, customer's order number, or your transaction number. You can enter, edit, view, and print invoices from a single screen. You will have access to real-time inventory availability if Sales Order is interfaced to the Traverse Inventory application. A sophisticated price calculator lets you find the best deal for your customers even before an order is entered.

Much more than just an order entry system, Traverse Sales Order helps you manage the complete transaction life cycle—from quote to order fulfillment and, if necessary, through the Return Material Authorization (RMA) process. Blanket orders can be processed with the addition of the Requirements Planning (RP) application.

- **Send invoices, statements, order acknowledgments, and quotes in the format the customer prefers (email, paper, or fax). Print an internal copy of the invoice or statement even though customer copies may have been emailed or faxed.**

- **Easily create new orders by copying from existing orders in history; simply view the different transactions posted to history, select one that matches current order information, and create a new order.**

- **Print invoices in the customer currency or the company base currency, according to the customer's preference.**

- **Use prices that are calculated based on customer level, order quantity, special promotions, or customer specific prices for items. Item prices can be calculated based on markups from cost or last cost or markdowns from average, list, base, or calculated prices.**

- **Process RMA transactions so that a credit memo is not issued until the customer returns the items to your warehouse. The posting of the credit memo is separated from the posting of the inventory return so they can be done independently.**

Additional Sales Order Features

- Generate transaction numbers automatically or manually.

- Easily convert quotes to live orders.

- Set up multiple price breaks for each customer based on customer level, item, and/or location.

- Automatically generate backorders and track them through final disposition.

- Choose tax-on-freight and/or miscellaneous charges.

- Assess sales taxes using multiple tax locations per tax group.

- Optionally calculate tax on taxes (for example, for GST/PST in Canada).

- Pay commissions by line item on booked or paid invoices.

- Split commissions between sales reps.

- Apply payments and credits to specific invoices, including payments made via the Transaction Payment System.

- Use the customer part number (alias) available as part of the Inventory Item Customer Alias functionality to allow you to capture and/or enter the customer's part number (alias) at order entry. Use Design Studio to place the customer part number on customer-facing documents.

- View scrollable, detailed descriptions for each item.

- Track sales and returns of items by lot number.

- Link to shippers such as UPS and FedEx for online tracking of shipments.

- Look up sales order transactions of any status, including orders already posted to history.

- Maintain separate, unique series numbers for credit memos and invoice numbers.

- Print or email order acknowledgment forms

- Print packing slips with backordered information and quantity shipped.

- Enter open-ended recurring entries.

- Print an acknowledgment, picking slip, packing slip, or invoice for orders of a certain status.

- Calculate item prices using price matrices.

- Get the help you need using the comprehensive online help system.

- Create customized invoice and dunning messages.

Sales Order Reports

Returned Items Journal

Open Orders

Backorder Allocations

Customer Levels List

Price Structures List

Customer Pricing List

Promotional Pricing List

Order Acknowledgment

Picking Slips, Packing Slips, Invoices

Sales Journal

Miscellaneous Credits Journal

Daily Sales Tax Journal

Returned Items

Booked Sales

Sales Performance