

# Sales Orders



Owned by Ana Laura Galeano Muñoz (Unlicensed) ...  
Last updated: Nov 08, 2022 by Camilo Barrios (Unlicensed) • 7 min read

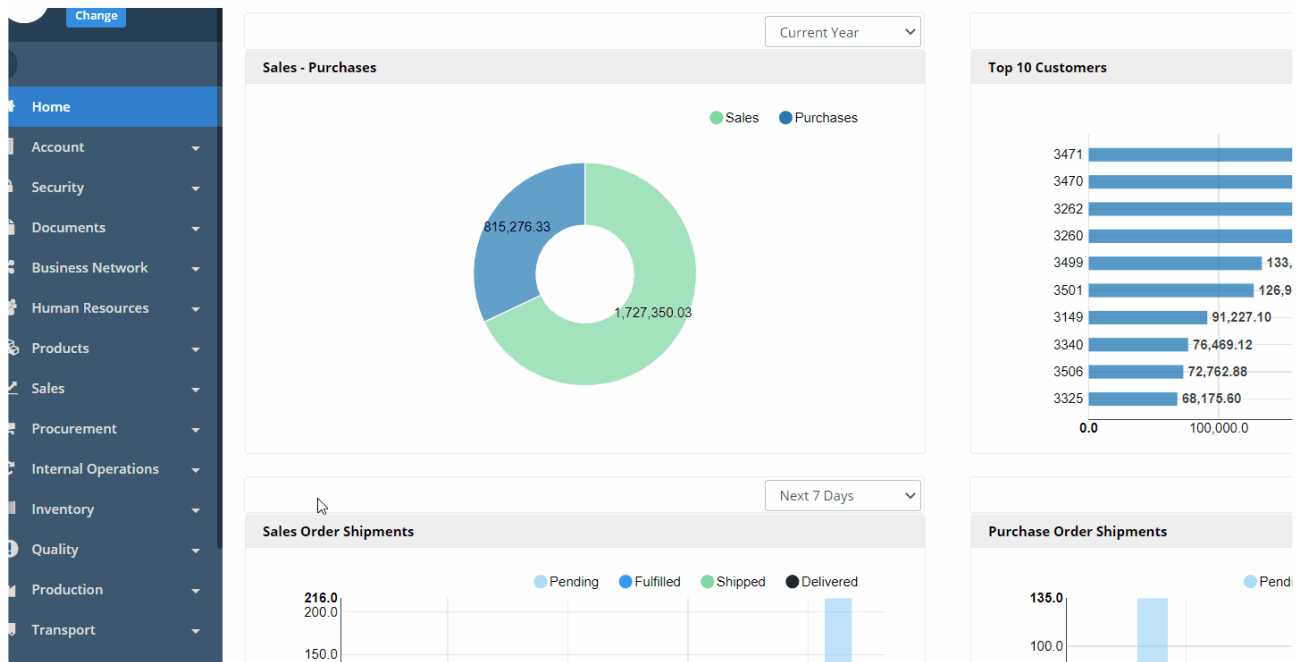
## Sales

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## First Steps

To reach the Sales Orders module, click on Sales, and then on Sales Orders, as is illustrated below:



Here you will find the following section:

SALES / SALES ORDERS

Refresh Create Page actions

Export Views Set Value

Filters

Search Customer Ship Date From Ship Date To Status

Invoice Status Carrier Delivery Date From Delivery Date To Quantity Status

More Filters... Actions

	Number	Customer	Reference	Carrier	Ship Terms	Ship Date	Delivery Date	Status	Amount	Documents			Quantity		
										Order	Shipping Pre-Alert	Invoice	CPO	Total	Shipped
	PB000599	3230	40833D	FFD	Delivery	12/24/2020	12/25/2020	Released	\$5,184.00					81	0
	PB000645	3149	863361	CHR	Delivery	12/19/2020	12/22/2020	Released	\$2,512.56					46	0
	PB000650	3478	5114080	WT	Delivery	01/31/2021	02/03/2021	Released	\$896.60					23	0
	PB000651	3478	5114081	WT	Delivery	02/04/2021	02/07/2021	Released	\$6,813.00					173	0
	PB000652	3478	5114082	WT	Delivery	02/07/2021	02/10/2021	Released	\$7,081.70					180	0
	PB000666	3262	0532090756	CR	Delivery	12/18/2020	12/23/2020	Released	\$1,073.60					32	0
	PB000667	3506	0531143802	CR	Delivery	12/19/2020	12/20/2020	Released	\$846.08					32	0
	PB000668	3506	0531779316	CR	Delivery	12/21/2020	12/22/2020	Released	\$423.04					16	0
	PB000669	3260	0532340945	CR	Delivery	12/18/2020	12/23/2020	Released	\$2,645.60					80	0

If you're interested in learning more about Filters and Page Actions, please consult the [Search Pages](#) article.

To create a new Sales Order, click the "+New" button to open the Sales Order creation screen:

SALES / SALES ORDER

Save + New Document

Number: SO004643

Date: 12/22/2020

Shipping Terms: Delivery

Carrier: Armellini

Customer\*: Caggiano Flowers

Customer Ref / Order:

Ship Date: 12/23/2020 00:00

Cut-off:

Category: None

Payment Terms: Net 45

Delivery Date: 12/23/2020 00:00

Status: Draft

QUANTITIES: TOTAL, SHIPPED, DELIVERED, PALLETS

FINANCE: SUBTOTAL, CHARGES, DISCOUNTS, AMOUNT

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS ATTACHMENTS NOTES INTEGRATIONS

+ Add Actions Transfer Charges Discounts Show Labels Quick Entry

Size: 200 0 - 0 Of 0

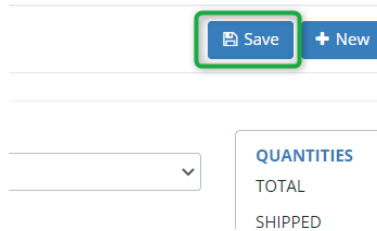
No.	Reference	Name	Quantity	Full Pack Type	Unit Price	Net Price	Amount
-----	-----------	------	----------	----------------	------------	-----------	--------

Remember, only the fields with an asterisk are required. Nonetheless, we will go over the most common ones completed for a basic Sales Order:

- **Customer:** Click on the magnifier to select from the list, or begin to type the name and Traze will autocomplete the selection. Once you select a Customer, the following fields will be completed automatically:
  - **Number:** A number is assigned to the Sales Order to identify it on Traze.
  - **Date:** By default this will be the date of creation of the Sales Order, but you may click on the calendar to choose another *future* date.
  - **Shipping Terms:** These are imported from the [Customer Account's](#) default internal settings. If necessary, you can select an option to override the default.

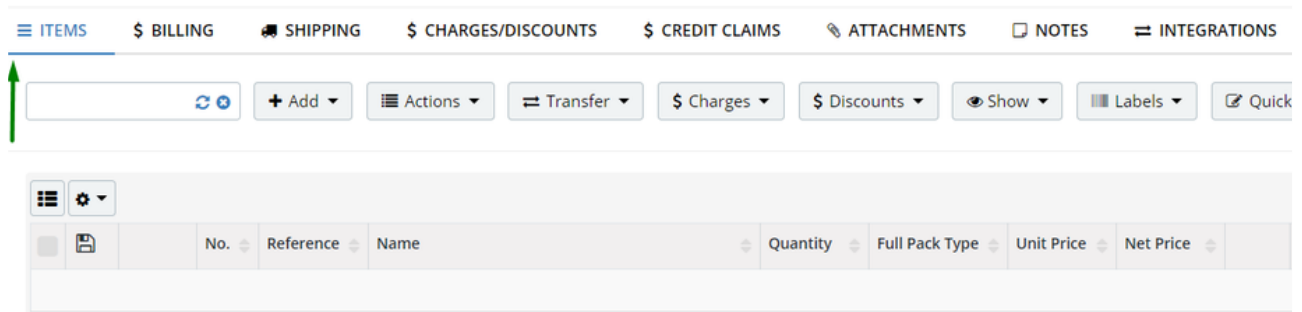
- The Ship Date and Delivery Date fields will be enabled or disabled automatically according to each different [Shipping Term](#).
- **Customer Ref/Order:** Add a reference for the customer if it applies.
- **Carrier:** Click on the magnifier to bring up the list of Carriers that have been registered onto Traze (as [Supplier Accounts](#)).
- **Cut-off:** COMING SOON

Remember to click on Save when you finish completing the header:

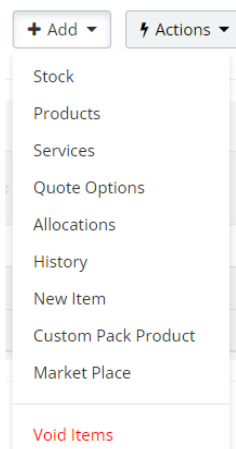


## ITEMS

### Method 1



Under this tab, you may add all of the items that are being sold under the current Sales Order. To begin, click on “+Add” and select Products from the list that appears:



i You may select any other option from the list according to the needs for the Sales Order.

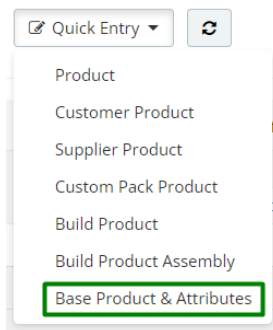
This process is illustrated below:

**i** You can search products by pack type, category, stage, packing, price list, customer, and partner subscription by using the filters above. To learn more about filters, consult the [Search Pages](#) article.

Remember to enter the Quantity and the Unit Price (if it's missing) in this window before pressing "Add and Close".

## Method 2

On the Quick Entry drop-down menu, select Base Product & Attributes:



The following fields will be enabled:

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS ATTACHMENTS NOTES INTEGRATIONS

+ Add Actions Transfer To Charges Discounts Show Labels Quick Entry

Base Product / Main Component Product Pack Type \* Price List

Quantity \* Price \*

Amount \$0.00 Total Unit of Measure 0 Stock: On Hand 0 / Allocated 0 / Total 0 Add Add & Clear Clear

No.	Reference	Name	Quantity	Full Pack Type	Net Price	Unit Price	Discounts	Amount
							Unit Discount	Discounts

Select a Base Product first. Enter it into the first field (called Base Product / Main Component):

Base Product / Main Component Flower Color Rose Grade Rose Variety

Product Pack Type \* Quantity \* Cost \*

Add Add & Clear Clear

More fields will be enabled once the Base Product is chosen.

Complete the rest of the fields according to the attributes desired in the product:

- Flower Color.
- Rose Grade.
- Rose Variety.

Once those attributes are selected, the Product and Pack Type fields will be completed automatically by Traze:

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS INVENTORY ATTACHMENTS NOTES

+ Add Actions Transfer To Charges Discounts Show Labels Quick Entry

Base Product / Main Component Flower Color Rose Grade Rose Variety

Product Pack Type \* Quantity \* Cost \*

Add Add & Clear Clear

Enter a quantity and cost:

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS INVENTORY ATTACHMENTS NOTES

+ Add Actions Transfer Charges Discounts Show Labels Quick Entry

Base Product / Main Component: Rose  
 Flower Color: Red  
 Rose Grade: 50 CM  
 Rose Variety: Hearts  
 Product: Rose Red 50 CM Hearts 25 Stm  
 Pack Type \*: x 25 stm  
 Quantity \*: 8 x 25 stm  
 Cost \*: 6.50 /bu

Add Add & Clear Clear

Press Add & Clear to continue.

The product will be added to the order:

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS INVENTORY ATTACHMENTS NOTES

+ Add Actions Transfer Charges Discounts Show Labels Quick Entry

Base Product / Main Component:   
 Product:   
 Pack Type \*:   
 Quantity \*:   
 Cost \*:

Add Add & Clear Clear

No.	Reference	Name	Quantity	Full Pack Type	Net Cost	Unit Cost	Discounts			Amount
							Unit Discount	Discounts		
1	ROSRED50...	Rose Red 50 CM Hearts 25 Stm	8	bu x 25 stm	\$6.500	6.5	0	\$0.00	\$52.00	\$52.00
						6.50	0	\$0.00	\$52.00	\$52.00
						6.50	0	\$0.00	\$52.00	\$52.00

### Deleting a line of items

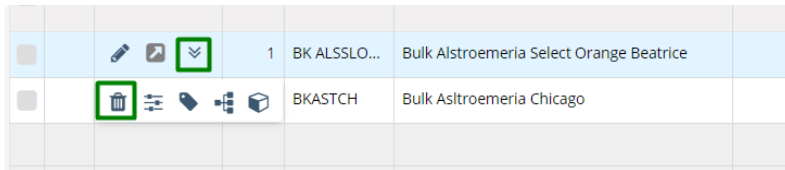
ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS ATTACHMENTS NOTES INTEGRATIONS

+ Add Actions Transfer Charges Discounts Show Labels Quick Entry

No.	Reference	Name	Quantity	Full Pack Type	Net Price	Unit Price	Discounts			Amount
							Unit Discount	Discounts		
1	BK ALSSLO...	Bulk Alstroemeria Select Orange Beatrice	4	FB x 25 bu	\$5.25	5.25	0	\$0.00	\$5	\$5
2	BKASTCH	Bulk Alstroemeria Chicago	3	HB x 20 bu	\$4.50	4.5	0	\$0.00	\$2	\$2
						9.75	0	\$0.00	\$7	\$7
						9.75	0	\$0.00	\$7	\$7

To delete a line there are two methods:

## Method 1

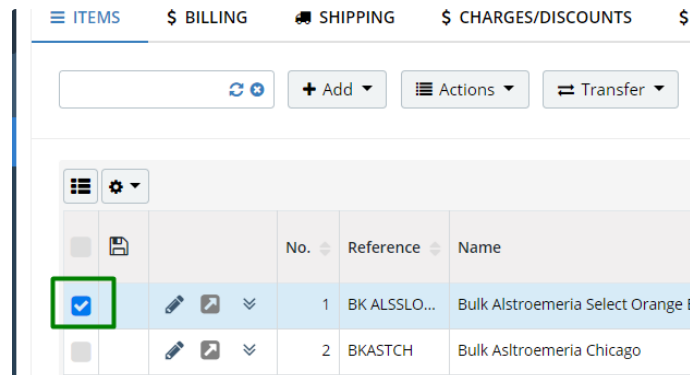


		1	BK ALSSLO...	Bulk Alstroemeria Select Orange Beatrice
			BKASTCH	Bulk Asltroemeria Chicago

Click on the down arrows on the left of the product line, and then click on the trash can.

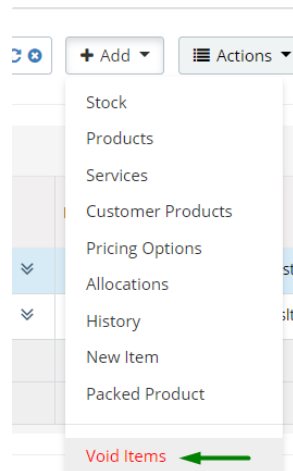
## Method 2

Select the line of the product:



No.	Reference	Name
1	BK ALSSLO...	Bulk Alstroemeria Select Orange E
2	BKASTCH	Bulk Asltroemeria Chicago

Click on "+Add" and then on Void Items:



## BILLING

COMING SOON

## SHIPPING

COMING SOON

## CHARGES/DISCOUNTS

ITEMS \$ BILLING \$ SHIPPING \$ CHARGES/DISCOUNTS \$ CREDIT CLAIMS \$ ATTACHMENTS \$ NOTES \$ INTEGRATIONS											
<input type="text"/> <span>+</span> Add <span>Actions</span> <span>Transfer</span> <span>\$ Charges</span> <span>\$ Discounts</span> <span>Show</span> <span>Labels</span> <span>Quick Entry</span>											
											Size 200
	No.	Reference	Name	Quantity	Full Pack Type	Net Price	Unit Price	Discounts			
								Unit Discount	Discounts	Amount	
	1	BK ALSLO...	Bulk Astroemeria Select Orange Beatrice	4	FB x 25 bu	\$5.25	bu	5.25	0	\$0.00	\$525.00
	2	BKASTCH	Bulk Astroemeria Chicago	3	HB x 20 bu	\$4.50	bu	4.5	0	\$0.00	\$270.00
							9.75	0	\$0.00	\$795.00	
							9.75	0	\$0.00	\$795.00	

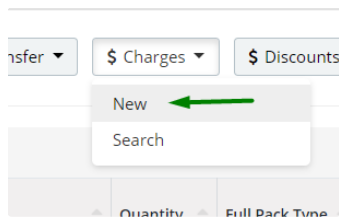
You may add Charges and Discounts to a single item line, or to the entire order.

### Single Item Line

Select the line of the item that you'd like to add charges or discounts to:

ITEMS \$ BILLING \$ SHIPPING \$ CHARGES/DISCOUNTS \$ CREDIT CLAIMS \$ ATTACHMENTS \$ NOTES \$ INTEGRATIONS											
<input type="text"/> <span>+</span> Add <span>Actions</span> <span>Transfer</span> <span>\$ Charges</span> <span>\$ Discounts</span> <span>Show</span> <span>Labels</span> <span>Quick Entry</span>											
											Size 200
	No.	Reference	Name	Quantity	Full Pack Type	Net Price	Unit Price	Discounts			
								Unit Discount	Discounts	Amount	
<input checked="" type="checkbox"/>	1	BK ALSLO...	Bulk Astroemeria Select Orange ...	4	FB x 25 bu	\$5.25	b	5.25	0	\$0.00	
	2	BKASTCH	Bulk Astroemeria Chicago	3	HB x 20 bu	\$4.50	b	4.5	0	\$0.00	
							9.75	0	\$0.00		
							9.75	0	\$0.00		

Click the Charges button and then click on "New". You may also click on "Search" if you have already created a Charge in the Finance Module:



The following window will appear:



**Finance Charge**

**FINANCE / CHARGE/DISCOUNT**

Name \*  Level \*

Value \*   Unit

Adjustment Type  Cost Distribution

Service

DISTRIBUTE

FOREIGN CURRENCY

GENERATE RECEIVABLE

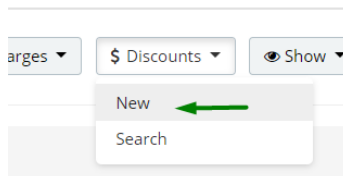
GENERATE PAYABLE

Complete the fields as follows:

- **Name:** Name of the charge.
- **Value:** Enter a value and select the unit from the drop-down menu.
- **Adjustment type:** Select whether the adjustment is for freight, tax, or other.
- **Check Boxes:** **COMING SOON**

Click on Save & Close to finish. The charge will be added.

In the same way, click on the "Discounts" button and click on "New":



The same window will appear, which you can complete in the same way as for a Charge:

✕
**Finance Discount**

**FINANCE / CHARGE/DISCOUNT**

<b>Name *</b> <input style="width: 95%;" type="text" value="Friend of the company"/>	<b>Level *</b> <input style="width: 95%;" type="text" value="1"/>
<b>Value *</b> <input style="width: 60%;" type="text" value="10"/> <input style="width: 30%; border: 1px solid #ccc;" type="text" value="Percent"/>	<b>Unit</b> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>
<b>Adjustment Type</b> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Other"/>	<b>Cost Distribution</b> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Per Amount"/>
<b>Service</b> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>	

DISTRIBUTE  
 FOREIGN CURRENCY  
 GENERATE RECEIVABLE  
 GENERATE PAYABLE

Click on Save & Close to finish. The discount will be added to the item.

### Entire Order

To add a Charge or a Discount to an entire order, click on the Charges/Discounts tab, which is to the right of the Shipping Tab:

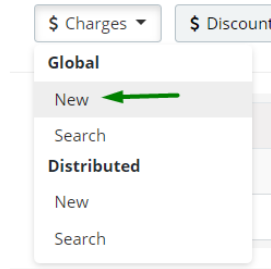
ITEMS
\$ BILLING
SHIPPING
\$ CHARGES/DISCOUNTS
\$ CREDIT CLAIMS
ATTACHMENTS
NOTES
INTEGRATIONS

	No.	Reference	Name	Quantity	Full Pack Type	Net Price	Unit Price	Discounts		Amount	
								Unit Discount	Discounts		
	1	BK ALSSL...	Bulk Astroemeria Select Orange Beatrice	4	FB x 25 bu	\$5.09	bu	5.25	0.53	\$53.00	\$509.00
	2	BKASTCH	Bulk Astroemeria Chicago	3	HB x 20 bu	\$4.50	bu	4.5	0.00	\$0.00	\$270.00
								9.75	0.53	\$53.00	\$779.00
								9.75	0.53	\$53.00	\$779.00

Here, you'll be able to visualize all Charges and Discounts that have already been added to the order, be it for single items or for the entire thing:

<span>ITEMS</span> <span>BILLING</span> <span>SHIPPING</span> <span>CHARGES/DISCOUNTS</span> <span>CREDIT CLAIMS</span> <span>ATTACHMENTS</span> <span>NOTES</span> <span>INTEGRATIONS</span>											
<span>Charges</span> <span>Discounts</span> <span>Delete</span> <span>Refresh</span>											
Applied To	Level	Name	Entry Type	Value	Calc. Mode	Currency	Base	Amount			
000004-0001	1	Friend of the company	Discount	10.00	Percent		\$525.00	<b>-\$52.50</b>			
000004-0001	1	Taxes	Charge	7.00	Percent		\$525.00	<b>\$36.75</b>			

Click on Charges or Discounts (the process is identical) and click on New Global charge/discount to continue:



The following window will appear:

**Finance Charge** ✕

**FINANCE / CHARGE/DISCOUNT**

**Name \***

**Level \***

**Value \***

**Unit**

**Adjustment Type**

**Cost Distribution**

**Service**

DISTRIBUTE

FOREIGN CURRENCY

GENERATE RECEIVABLE

GENERATE PAYABLE

Complete the fields as it was explained above and click on Save & Close to finish. The charges/discounts will be added to the entire order:

[Charges](#)
[Discounts](#)
[Delete](#)

	Applied To	Level	Name	Entry Type	Value	Calc. Mode	Currency	Base	Amount
	000004	1	Veterans	Charge	5.00	Percent		\$795.00	\$39.75
	000004-0001	1	Friend of the company	Discount	10.00	Percent		\$525.00	-\$52.50
	000004-0001	1	Taxes	Charge	7.00	Percent		\$525.00	\$36.75

As you can see, the base for this last charge was the cost of the entire order.

### CREDIT CLAIMS

COMING SOON

### ATTACHMENTS

Click on Upload to load a file onto the Sales Order:

[ITEMS](#)
[BILLING](#)
[SHIPPING](#)
[CHARGES/DISCOUNTS](#)
[CREDIT CLAIMS](#)
[ATTACHMENTS](#)

[Upload](#)
[Download](#)
[Delete](#)

Name	Public	Content Type

Once there are files uploaded onto the Sales Order, you may select the lines and click on Download or Delete, or right in the same line you may click on the downward-facing arrow to download, or the trash can to delete.

[ITEMS](#)
[BILLING](#)
[SHIPPING](#)
[CHARGES/DISCOUNTS](#)
[CREDIT CLAIMS](#)
[ATTACHMENTS](#)
[NOTES](#)
[INTEGRATIONS](#)

[Upload](#)
[Download](#)
[Delete](#)

Name	Public	Content Type	Uploaded
DOCUMENT TEMPLATE V2	✓	docx	09/06/2022 10:47

### NOTES

Click on New to create a note:

[ITEMS](#)
[BILLING](#)
[SHIPPING](#)
[CHARGES/DISCOUNTS](#)
[CREDIT CLAIMS](#)
[ATTACHMENTS](#)
[NOTES](#)

+ New
- Delete

	Order	Date	Date Time	Type	Note

Complete the following window with the Type of note (you may select from the drop-down or create a new one by clicking on the "+"), the content of the note, and the order in case of multiple notes. You may also choose to check or uncheck the Public attribute to make the note public:

**Edit Item** ✕

NOTE

Type

Acceptable Varieties ▼ + - ✎

Note \*

This is a test note

Public

Order

Save
Close

## INTEGRATIONS

Under the Integrations tab (shown below), you will be able to see all of the transactions that have occurred through EDI related to this specific order, if it applies:

[ITEMS](#)
[BILLING](#)
[SHIPPING](#)
[CHARGES/DISCOUNTS](#)
[CREDIT CLAIMS](#)
[ATTACHMENTS](#)
[NOTES](#)
[INTEGRATIONS](#)

Created	Direction	Transaction	Reference	Description	Status	Message	Details
09/08/2021 16:27	Inbound	→ 850 Get Sales Orders	1b66b974efac3fe6a9988961e...	Order SO017921 Reference=9...	✓		<span style="float: right;">⋮</span>
09/08/2021 15:51	Outbound	← 810 Send Sales Invoices		Invoice IN065509 Reference=...	✓		<span style="float: right;">⋮</span>
09/08/2021 15:15	Outbound	← 856 Send Shipment Notice		Shipment SH020231 Referenc...	✓		<span style="float: right;">⋮</span>
08/24/2021 13:49	Outbound	← 855 Confirm Sales Orders		Order SO017921 Reference=9...	✓		<span style="float: right;">⋮</span>
08/23/2021 16:32	Inbound	→ 850 Get Sales Orders	1d988834412d5b20a03b0065...	Order SO017921 Reference=9...	✓		<span style="float: right;">⋮</span>

Once you've finished configuring all of the parameters, you may complete the order by changing the status from Draft, to Released (shown below). This way it will be available in other sections of Traze to continue its process, like Production Needs and Shipping Needs:

**SALES / SALES ORDER** Save + New Document

<b>Number</b> S0004643	<b>Customer *</b> Caggiano Flowers <small>Juan Camilo Ucros</small>	<b>Category</b> None	<b>QUANTITIES</b> TOTAL SHIPPED DELIVERED PALLETS  <b>FINANCE</b> SUBTOTAL <b>\$10,368</b> CHARGES \$0 DISCOUNTS \$0 <b>AMOUNT \$10,368</b>
<b>Date</b> 12/22/2020	<b>Customer Ref / Order</b>	<b>Payment Terms</b> Net 45	
<b>Shipping Terms</b> Delivery	<b>Ship Date</b> 12/23/2020 00:00	<b>Delivery Date</b> 12/23/2020 00:00	
<b>Carrier</b> Armellini	<b>Cut-off</b>	<b>Status</b> Draft	

ITEMS BILLING SHIPPING CHARGES/DISCOUNTS CREDIT CLAIMS ATTACHMENTS NOTES INTEGRATIONS

+ Add Actions Transfer \$ Charges \$ Discounts Show Labels Quick Entry

No.	Reference	Name	Quantity	Full Pack Type	Unit Price	Net Price	Amount
1	BQDZ RSEX...	Bouquet Dozen Rose Export 50 CM Red Gyp Lf Clea...	90	XL PR FL x 360 ...	\$0.32000	\$0.32000	strm <b>\$10,368.00</b>

After changing the Status to Released, remember to click on Save.

## Positive Updates

### UPDATE I

When on the main Sales Orders screen:

LES / SALES ORDERS

Search: 
 Customer: 
 Ship Date From: 
 Ship Date To: 
 Status:

Invoice Status: 
 Quantity Status: 
 Carrier: 
 Delivery Date From: 
 Delivery Date To: 
 Accounting Transmit Status:

Creation Source: 
 Category: 
 Services: 
 Stages: 
 Shipping Terms: 
 Customer Integration Status:

	Number	Customer	Reference	Carrier	Ship Terms	Ship Date	Delivery Date	Status	Stage	Amount	Documents				Quantity	
											Order	Shipping Pre-Alert	Invoice	CPO	Total	Shipped
	SO06000...	607775		DENV	DWF Delivery	04/13/2022	04/13/2022	Released	Real	\$7.00					2	0
	SO06000...	627580			DWF Delivery	04/14/2022	04/14/2022	Released	Real	\$1,104.80					86	0
	SO06000...	638205			DWF Delivery	04/08/2022	04/08/2022	Released	Real	\$18.75					4	0
	SO06000...	DWF000001		DENV	DWF Delivery	04/08/2022	04/08/2022	Released	Real	\$17.50					5	0
	SO06000...	DWF000001		DENV	DWF Delivery	04/07/2022	04/07/2022	Released	Real	\$15.80					4	0
	SO06000...	607775		DENV	DWF Delivery	04/08/2022	04/08/2022	Released	Real	\$87.75					27	0
	SO06000...	607775		DENV	DWF Delivery	04/13/2022	04/13/2022	Released	Real	\$309.70					16	0
	SO06000...	607775		DENV	DWF Delivery	04/07/2022	04/07/2022	Released	Real	\$10.50					3	0

Click on the "More" button for additional filters. The following window will appear:

**Filters** ✕

Transaction Date From:

Transaction Date To:

Term Date From:

Term Date To:

Updated Date From:

Updated Date To:

**Account Manager**

Down Payment:

Back Order:

Product Quote Status:

You will now be able to filter by Account Manager (you may type or click on the magnifier to search by Account Manager).

