Sales Orders



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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:

SALE	S / SA	LES ORDI	ERS	ustomer		Ship Da	ite From		Ship Date To		•	Status	D Exp	oort 👻 🖣	🌢 Views 🗸	
			20		Q	12/18	/2020	=			8	All		* #	More Filter:	s
Invoi	e Status		c	arrier		Deliver	y Date From		Delivery Date	То		Quantity Status		_		_
			•		Q						8	All		-	Actions 👻	
I													Size 50	✓ 1 - 20 Of	20 « <	1 .
		Number 🔺	Customer	Reference	Carrier	Ship Terms	Ship Date	Delivery D	ate 🔅 Status	Amount	Orda	Docum	ents	(200	Qu	antity
	10	PB000599	3230	40833D	FFD	Delivery	12/24/2020	12/25/2	020 Released	\$5,184.00	Orde	r Shipping Pre-Alert	invoice	▲	81	Snipp
	1	PB000645	3149	863361	CHR	Delivery	12/19/2020	12/22/2	020 Released	\$2,512.56				•	46	
	1	PB000650	3478	5114080	WT	Delivery	01/31/2021	02/03/2	021 Released	\$896.60				1	23	
	1	PB000651	3478	5114081	WT	Delivery	02/04/2021	02/07/2	021 Released	\$6,813.00				•	173	
	/	PB000652	3478	5114082	WT	Delivery	02/07/2021	02/10/2	021 Released	\$7,081.70				•	180	
	10	PB000666	3262	0532090756	CR	Delivery	12/18/2020	12/23/2	020 Released	\$1,073.60				1	32	
	1	PB000667	3506	0531143802	CR	Delivery	12/19/2020	12/20/2	020 Released	\$846.08				1	32	
	10	PB000668	3506	0531779316	CR	Delivery	12/21/2020	12/22/2	020 Released	\$423.04				1	16	
_																

() 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:

		Customer *	Category				
0004643	Q	Caggiano Flowers Q	None	~	QUANTITIES		
te		Juan Camilo U Customer Ref / Order	Payment Terms		SHIPPED		
2/22/2020	(11)		Net 45	~	DELIVERED		
ipping Terms		Ship Date	Delivery Date		PALLETS		
Delivery	~	12/23/2020 00:00	12/23/2020 00:00	#	FINANCE		
rrier		Cut-off	Status		SUBTOTAL		
rier mellini Q		É	Draft	~	CHARGES		
					AMOUNT		
ems 💲 Billing 🐗 Shipping	\$ Cł	HARGES/DISCOUNTS \$ CREDIT CLAIMS	▲ ATTACHMENTS □ NOTES	INTEGRATIONS			
	I Actio	nns ▼ 🚍 Transfer ▼ 💲 Charges ▼ 💲	Discounts 🗸 👁 Show 👻 💷 Lai	bels 🔻 🕼 Quick	Entry - 2		

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

≡ ITEMS	\$ BILLING	# SHIPPING	\$ CHARGES/DISCOUNTS	\$ CREDIT CLAIN	IS 🗞 ATTACHMEN	TS 🖸 NOTES	
	20	+ Add •	i≣ Actions ▼	\$ Charges	S Discounts -	Show ▼	∎ Labels ▼
	No. 👙	Reference 👙	Name		Quantity 👙 Full Pack 1	Type 🝵 Unit Price	🗢 Net Price 🖕

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:



This process is illustrated below:

		SALES / SALES ORDER				🖺 Save 🕇 New 🙆 Document
ange Full Menu		Number 50004643	Q	Customer * Caggiano Flowers Q	Category None	QUANTITIES
	÷	Date	#	Juan Camilo Ucros	Payment Terms	SHIPPED DELIVERED
	-	Shipping Terms		Ship Date	Delivery Date	PALLETS
ts	-	Delivery	~	12/23/2020 00:00	12/23/2020 00:00	FINANCE SUBTOTAL
Network esources	•	Armellini	Q	Cut-611	Draft ~	CHARGES DISCOUNTS
	-				•	AMOUNT
	•		c tr			
ategories ccounts	•	CO + Add -	Actio	ons • Z Transfer • \$ Charges • \$ Disc	iounts • Show • III Labels • 2 Quic	ck Entry -
rs s ders		Image: Second secon	Name	e Quantity e	Full Pack Type Unit Price Net Price	Size 200 V 0-0 Of 0 « < V

• 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 \$ BIL	LING SHIPPING	\$ CHAR	GES/DISCOUNTS → Transfer To	\$ CREDIT CLAIMS	ATTA \$ Disco	unts 🔹	Show •	≓ INTEGR		uick Entry 🔹 🖸		
Base Product / I Quantity *	Main Component	Q	Product Price *		~	Pack Type *			~	Price List None		~
Amount \$0.0	0 Total Unit of Measure	0 Stock	: On Hand 0 / Allocate	ed 0 / Total 0						Add Size 200 🗸 0 - 0 Of 0	Add & Clear	Clear
B	No. 🗘 Reference 🗢	Name		\$ Qua	ntity 🔅 Fu	ull Pack Type 👙	Net Price	Unit Price 🗘		Discounts Unit Discount Discounts	Amount	¢

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	
Rose	Q	None 🗸	None	~	None	~
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:

E ITEMS	\$ BILLING	SHIPPING	\$ CHARG	ES/DISCOUNTS	\$ CREDIT CLAIMS	III IN	VENTORY	⊗ ATTACH	IMENTS	NOTES					
	00	+ Add •	E Actions	Transfer	\$ Charges •	\$ Disc	ounts 🔻	Show ▼	III Labels	• 🕼 Qu	iick Entry 👻	0			
Base Processon	roduct / Main Con	nponent	Q	lower Color Red		~	Rose Gi 50 CM	ade		~	Rose Var Hearts	iety			~
Produc Rose	t Red 50 CM Hearts	25 Stm	· ·	ack Type * x 25 stm		~	Quanti	у *		x 25 stm	Cost *			/bu	~
												A	dd Add & C	lear	Clear

Enter a quantity and cost:

E ITEMS	\$ BILLING	SHIPPING	\$ CH/	ARGES/DISCOUNTS	\$ CREDIT CLAIMS		NVENTORY	⊗ ATTACH	MENTS							
	00	+ Add •	E Action	s 🔹 Transfer 👻	\$ Charges 🔻	\$ Dis	counts 🔻	● Show ▼	III Labels	•	uick Entr	y •	3			
Base Pr Rose	roduct / Main Com	nponent	۹	Flower Color Red		~	Rose Gr 50 CM	ade		~	Ros	e Varie earts	ty			~
Produc	t			Pack Type *			Quantit	y *			Cos	t *				
Rose	Red 50 CM Hearts	25 Stm	~	x 25 stm		~			8	x 25 stm				6.50	/bu	~
													A	dd Add	& Clear	Clear

Press Add & Clear to continue.

The product will be added to the order:

≡ ITEMS	\$ BILLI	NG	🚚 SH	IPPING	CHARGE	5/DISCOUNTS	CREDIT CLAIN	us III I	NVENTORY	ℜ ATTACHMEN	ITS 🖸 NO	TES				
		00	+ Ac	d ▼ 🔳	Actions 🔻	≓ Transfer ▼	\$ Charges	• \$ Disc	counts 💌	● Show ▼	l Labels 🔻	🕼 Qu	ick Entry 👻 🎗	;		
Base Pr	roduct / Ma	in Cor	nponen	t	Pro	oduct			Pack Type	•			Quantity *			
Contra				c				~				~				
Cost +					-											
														Add Add	& Clear C	lear
													el			
]												Size 200 V	1-10f1 «	< 1 > 3	> >
•			No. 🗘	Reference	Name			Quantity 0	Full Pack Ty	pe 🔅 Net Cost 🔅	Unit Cost 🔅		Disco Unit Discount 🖨	Discounts 🔅	Amount	¢
	1 🖬	⊗	1	ROSRED50	Rose Red	50 CM Hearts 25 Stm		8	bu x 25 stm	\$6.500	6.5	bu	0	\$0.00	\$52.0	00 :
											6.50		0	\$0.00	\$52.0	00
											6.50		0	\$0.00	\$52.0	00

Deleting a line of items

.

ITEN	MS	\$ E	BILLIN	G	🛲 Sł	HIPPING	CHARGES/DISCOUNTS \$ CREDIT	CLA	IMS 🗞 A	TTACHMENTS	5 0	NOTES	=	INTEGRATIONS	5		
			-	C 0	+ A	dd 🔻 🔳 A	Actions Transfer	rges	• \$ Disc	counts 👻	Show		Labels	s 🕶 🕼 Qu	ick Entry 👻	•	
	• •														Size 200	✓ 1-20f2 «	۲ (
	B				No. 😄	Reference 😄	Name		Quantity 😄	Full Pack Typ	e o Ne	et Price 🔅		Unit Price 😄	Disc	ounts	Amount
															Unit Discount 👙	Discounts 🔅	
		ø		≽	1	BK ALSSLO	Bulk Alstroemeria Select Orange Beatrice		4	FB x 25 bu		\$5.25	bu	5.25	0	\$0.00	
		an an		♦	2	BKASTCH	Bulk Asltroemeria Chicago		3	HB x 20 bu		\$4.50	bu	4.5	0	\$0.00	
														9.75	0	\$0.00	1

To delete a line there are two methods:

Method 1

	s 🛛 💌	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:

	\$ B	ILLIN	IG	🚚 SH	IIPPING	CHARGES/DIS	COUNTS \$
		;	3 8	+ Ac	id ▼ 🔳 A	Actions 🔻	⊐ Transfer ▼
				No. 🌲	Reference 🖨	Name	
	S		≽	1	BK ALSSLO	Bulk Alstroeme	ria Select Orange E
	A		≽	2	BKASTCH	Bulk Asltroeme	ria Chicago

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



BILLING

COMING SOON

SHIPPING

COMING SOON

CHARGES/DISCOUNTS

	TTEMS \$ BILLING # SHIPPING \$ CHARGE					HIPPING	\$ CHARGES/DISCOUNTS	\$ CREDIT CL	AIMS 👒 A	TTACHMENTS	NOTES	=	INTEGRATIONS				
				00	+ A	dd 🔻 🔳	Actions ▼	\$ Charges	s 🔹 💲 Dise	counts 💌 🖉	Show 👻 💷	Labels	s 🕶 🕼 Qu	ck Entry 👻	C		
•	• •													Size 200	✓ 1-20f2 «	< 1 ¥ >	*
	8				No. 😄	Reference 😄	Name		Quantity 👙	Full Pack Type	Net Price		Unit Price	Disc Linit Discount	Discounts	Amount	
		ø		♦	1	BK ALSSLO	Bulk Alstroemeria Select Orang	ge Beatrice	4	FB x 25 bu	\$5.25	bu	5.25	0	\$0.00	\$525.00	0 1
		ø		♦	2	BKASTCH	Bulk Asltroemeria Chicago		3	HB x 20 bu	\$4.50	bu	4.5	0	\$0.00	\$270.00	• 1
													9.75	0	\$0.00	\$795.00	0
													9.75	0	\$0.00	\$795.00	0

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:

≡ ITE	E ITEMS \$ BILLING		🚚 Sł	HIPPING	\$ CHARGES/DISCOUNTS \$	\$ CREDIT CLAIMS % ATTACHMENTS □ NOTES									
				00	+ A	dd 🔻 🔳	Actions Transfer	\$	Charges 🔻	\$ Discounts	 Show 	v •	▪ Labe	els 🔻 🕼 Qui	ck Entry 👻
:=	• •														Size 200
	B				No. 😄	Reference 🖨	Name		Quantity 😄	Full Pack Type 👙	Net Price 😄		Unit Price 👙	Disco	ounts
														Unit Discount 👙	Discounts 🔅
		(MA)	7	⇒	1	BK ALSSLO	Bulk Alstroemeria Select Orange .		4	FB x 25 bu	\$5.25	b	5.25	0	\$0.00
		SPA		⊗	2	BKASTCH	Bulk Asltroemeria 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:

nsfer 🔻	\$ Charges 🔻 💲 Discount					
	New 🗲	-				
	Search					
	Ouantity	Full Pack Type				

The following window will appear:

Finance Charge

FINANCE / CHARGE/DISCOUNT

Name *			Level *						
Taxes			1						
Value *			Unit						
7	Percent	~			Q				
Adjustment Type			Cost Distribution						
Other		~	Per Amount		~				
Service									
		Q							
	Y								
GENERATE RECEIVA	ABLE								
GENERATE PAYABL	E								
			Save	Save & Close	Cancel				

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":

arges 🔻	\$ Discounts •	● Show ▼
	New 🚽	-
	Search	

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

inance Discount					>
FINANCE / CHAR	GE/DISCOUI	NT			
Name *			Level *		
Friend of the compa	ny		1		
Value *			Unit		
10	Percent	\sim			Q
Adjustment Type			Cost Distribution		
Other		\sim	Per Amount		~
Service					
		Q			
FOREIGN CURREN	СҮ				
GENERATE RECEIV	ABLE				
GENERATE PAYAB	LE				
			Save	Save & Close	Cancel

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:

E ITE	NS	\$ B	ILLI	NG	a si		CHARGES/DISCOUNTS \$ CREDIT	CLA	ums 🗞 /	ATT	ACHMENTS	D NOTES	=	INTEGRATIONS			
				00	+ A	dd 🔻 🔳 A	Actions Transfer Char	rges	• • \$ Dis	cou	unts 🔻 🗶 S	how •	Label	s 🔻 🕼 Qui	ck Entry 👻	C	
I	• •														Size 200	✓ 1-20f2 «	< 1 >
	8				No. 😄	Reference 🔅	Name		Quantity 🔅	F	ull Pack Type 🔅	Net Price 🔅		Unit Price 🔅	Disc Unit Discount	Discounts	Amount 🔅
		æ		♦	1	BK ALSSLO	Bulk Alstroemeria Select Orange Beatrice		4	i Fi	B x 25 bu	\$5.09	bu	5.25	0.53	\$53.00	\$509.00
		an a		♦	2	BKASTCH	Bulk Asltroemeria Chicago		3	вн	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:

ITE	MS	\$	BILLING 🖪 S	HIPPING	\$ CHARGES/DISCOU	UNTS \$ CREI	DIT CLAIMS		□ NOTES		TIONS	
\$ Charges • \$ Discounts • - Delete 3												
			Applied To	Level 🛎	Name 🍙	Entry Type 🛛 🖨	Value 👙	Calc. Mode \ominus	Currency 🔅	Base 💠	Amount 🔶	
	5 47	ŵ	Applied To * 000004-0001	Level A	Name 🌲 Friend of the company	Entry Type 🔅 Discount	Value	Calc. Mode 🗇 Percent	Currency 🗘	Base 🔅	Amount 💠	

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 / CH	IARGE/DISCO	UNT		
Name *			Level *	
Veterans			1	
Value *			Unit	
5	Percent	~		Q
Adjustment Type			Cost Distribution	
Other		~	Per Amount	\sim
Service				
		Q		
	RENCY			
GENERATE RE	CEIVABLE			
GENERATE PA	YABLE			
			Save Save & Close	Cancel

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:

e ite	MS	\$	BILLING 🚚 S	HIPPING	\$ CHARGES/DISCOU	JNTS \$ (CREDIT CLA	IMS		NOTES	≓ INTEGRA	TIONS			
\$ (\$ Charges • \$ Discounts • - Delete 2														
			Applied To 🔶	Level 🛎	Name 🍝	Entry Type	Value		Calc. Mode 😄	Currency 🔅	Base 💠	Amount 😄			
	S	ŵ	000004	1	Veterans	Charge		5.00	Percent		\$795.00	\$39.75			
	San a	ŵ	000004-0001	1	Friend of the company	Discount		10.00	Percent		\$525.00	-\$52.50			
	6 1	Û	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:

	\$ BILLING	SHIPPING	\$ CHARGES/DISCOUNTS	\$ CREDIT CLAIMS	℅ ATTACHMENTS
↑ Upload	◆ Downloa	ad 🗎 Delete			
	Name	2		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.

	\$ BILLI	NG	SHIPPING	\$ CHARGES/DISCOUNTS	\$ CREDIT	CLAIMS	ℜ ATTACHMENTS		
↑ Upload	↓ Do	wnload	d 🖻 Delete						
		Name				Public 😄	Content Type	Uploaded	
• •	Ĵ	DOCU	MENT TEMPLATE	V2		~	docx	09/06/202	22 10:47

NOTES

Click on New to create a note:

	\$ BILLING	🖪 SHIPPING	\$ CHARGES/DISCOUNTS	\$ CREDIT CLAIMS	ℜ ATTACHMENTS	
+ New	- Delete					
	Order 🔺 I	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	
Туре	
Acceptable Varieties 🗸 🕇 - 🖋	
Note *	
This is a test note	
Public Order	
Save	

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:

≡n	TEM	S \$ BILLING	SHIPPING	\$ CI	HARO	SES/DISCOUNTS \$ CREDIT	CLAIMS 🗞 ATTACHMENT	S D NOTES # IN	TEGRATIONS	_		
										Size 50 N	1-5 Of 5	< < 1 ¥ > ≫
	0	Created 👻	Direction			Transaction 🔅	Reference \Leftrightarrow	Description	🗘 Status 🔅	Message 👙	Details 😄	
		09/08/2021 16:27	Inbound		→	850 Get Sales Orders	1b66b974efac9fe6a9988961e	Order SO017921 Reference=9	. 🖌		C	1
		09/08/2021 15:51	Outbound		+	810 Send Sales Invoices		Invoice IN065509 Reference=.	× .		Ľ	:
		09/08/2021 15:15	Outbound		←	856 Send Shipment Notice		Shipment SH020231 Reference	. 🖌		Ľ	:
		08/24/2021 13:49	Outbound		-	855 Confirm Sales Orders		Order SO017921 Reference=9	. 🖌		C	1
		08/23/2021 16:32	Inbound		→	850 Get Sales Orders	1d988834412d5b20a03b0065	Order SO017921 Reference=9			Ľ	1

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:

	customer *	(Category			
Q	Caggiano Flowers	Q	None	~	QUANTITIES	
	Juan Camilo I Customer Ref / Order	Ucros	Payment Terms		SHIPPED	
=			Net 45	~	DELIVERED	
	Ship Date	(Delivery Date		PALLETS	
~	12/23/2020 00:00		12/23/2020 00:00	m	FINANCE	
	Cut-off		Status		SUBTOTAL	\$10,3
Q			Draft	~	CHARGES	
		^	ß		AMOUNT	\$10,3
\$ CH	HARGES/DISCOUNTS \$ CREDIT CLAIMS	ATTA ATTA Discoun Discoun	CHMENTS □ NOTES = INT	GRATIONS	K Entry - 2	
					Size 200 🗸 1 - 1 Of 1	« < 1 ×
	Q m Q Q S CF	Q Cagglano Flowers Juan Camilo I Juan Camilo I Juan Camilo I Image: Ship Date Image: Ship Date ✓ 12/23/2020 00:00 Cut-off Q S CHARGES/DISCOUNTS \$ CREDIT CLAIMS Image: Actions ▼ Image: Transfer ▼ \$ Charges ▼	Q Caggiano Flowers Q Juan Camilo Ucros Juan Camilo Ucros Image: Customer Ref / Order Juan Camilo Ucros Ship Date Image: Customer Ref / Order V 12/23/2020 00:00 Cut-off Image: Customer Ref / Order Q Image: Customer Ref / Order S CHARGES/DISCOUNTS \$ CREDIT CLAIMS S CHARGES/DISCOUNTS \$ CREDIT CLAIMS Image: Actions ▼ Image: Transfer ▼ \$ Charges ▼ S Charges ▼ \$ Discourtion	Q Caggiano Flowers Q None juan Camilo Ucros juan Camilo Ucros Payment Terms Image: Customer Ref / Order Payment Terms Net 45 Ship Date Delivery Date 12/23/2020 00:00 12/23/2020 00:00 Cut-off Status Draft Q Image: Customer S (CREDIT CLAIMS % ATTACHMENTS ID NOTES ID INTES ID NOTES ID INTES ID INTES ID NOTES ID INTES ID NOTES ID INTES ID INTES ID INTES Image: Customer S (Charges ▼ (S Discounts ▼ ID Show ▼ ID Labels ▼ ID Show ▼ ID Labels ▼ ID Show ▼ ID Labels ▼	Q Caggiano Flowers Q None ✓ juan Camilo Ucros juan Camilo Ucros Payment Terms ✓ Payment Terms Net 45 ✓ ✓ Ship Date Delivery Date ✓ 12/23/2020 00:00 ✓ Cut-off Status ✓ ① ✓ Q ✓ Draft ✓ ✓ \$ CHARGES/DISCOUNTS \$ CREDIT CLAIMS % ATTACHMENTS NOTES = INTEGRATIONS Image: Actions ▼ = Transfer ▼ \$ Charges ▼ \$ Discounts ▼ Image: Actions ↓ Image: Actions ↓	Q Caggiano Flowers Q Juan Camilo Ucros Juan Camilo Ucros Payment Terms TOTAL Ship Date Delivery Date I 12/23/2020 00:00 12/23/2020 00:00 Cut-off Status Cut-off Status Draft Discounts S CHARGES/DISCOUNTS \$ CREDIT CLAIMS S CHARGES/DISCOUNTS \$ CREDIT CLAIMS Notes = INTEGRATIONS

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

Positive Updates

UPDATE I

When on the main Sales Orders screen:

١LE	S /	SAL	ES ORD	ERS											c •	🕽 🕂 New	🗅 Export	• •	Views 👻	🖋 Set Va	lue
ear	:h				Cus	tomer			Ship Da	ate From		Ship Date T	o		State	us		_	_		
				00				Q	04/07	/2022	-	04/14/202	2	8	All		•	ТМ	ore 🕴	Actions 👻	
ivoi	voice Status Quantity Status				Carrier			Delivery Date From			Deliv	very Date To		Accounting Transmit Status							
	▼ All ▼			-			Q			=			=	•							
rea	reation Source Category				Service	s		Stages			Ship	ping Terms		Customer Integration Status							
*		*	All 👻			*	All 👻			•			•						,		
=																Size	50 ¥ 1	- 50 Of 110	« < Qua	1 V >	>
			Number 🕀	Custome	er 🔅	Reference 0	Carrier 🕀	Ship	Terms 🕀	Ship Date 🔅	Delivery Date	Status	Stage 🔅	Amount 🕀	Order	Shipping Pre-Alert	Invoice :	CPO	Total 😄	Shipped 😄	
	ø	0	SO06000	607775			DENV	DWF	Delivery	04/13/2022	04/13/2022	Released	Real	\$7.00	ß			•	2	0 1	1
	ø	6	SO06000	627580				DWF	Delivery	04/14/2022	04/14/2022	Released	Real	\$1,104.80	ß			•	86	0	:
	A	G	SO06000	638205				DWF	Delivery	04/08/2022	04/08/2022	Released	Real	\$18.75	ß			•	4	0 1	:
	ø	G	SO06000	DWF000	001		DENV	DWF	Delivery	04/08/2022	04/08/2022	Released	Real	\$17.50				•	5	0 1	:
	ø	C	SO06000	DWF000	001		DENV	DWF	Delivery	04/07/2022	04/07/2022	Released	Real	\$15.80	ß			•	4	0 1	:
ī	ø	0	SO06000	607775			DENV	DWF	Delivery	04/08/2022	04/08/2022	Released	Real	\$87.75				•	27	0 1	:
		C	SO06000	607775			DENV	DWF	Delivery	04/13/2022	04/13/2022	Released	Real	\$309.70	ß			•	16	0 1	:
		0	SO06000	607775			DENV	DWF	Delivery	04/07/2022	04/07/2022	Released	Real	\$10.50	ß			•	3	0 1	1
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Click on the "More" button for additional filters. The following window will appear:

Filters	×
Transaction Date From	
	#
Transaction Date To	
	m
Term Date From	
	m
Term Date To	
	m
Updated Date From	
	m
Updated Date To	
	#
Account Manager	
	٩
Down Payment	
	•
Back Order	
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Product Quote Status	
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You will now be able to filter by Account Manager (you may type or click on the magnifier to search by Account Manager).

UPDATE II

When creating a Sales Order, you may go under the ITEMS tab and press Quick Entry, then Product:

E ITEMS \$ BILLING # SHIPPING \$ CH	ARGES/DISCOUN	S \$ CREDIT CLAIMS % ATTACHMENT	S 🖸 NOTES		
CO + Add - 7 Actions	; ▼ 🗖 Iranst	er To ▼ \$ Charges ▼ \$ Discounts ▼	● Show ▼	Labels 🔻 🖉 Quick Entry 👻 🛛	
Product *		Price List		Quantity *	
Alstroemeria Assorted - 10 Stm	Q	Master Price List DENVER MPL	~		x 10 stm
Amount \$0.00 Total Unit of Measure 0	ck: On Hand 45 /	Allocated 121 / Total 166			

When you fill the Product field, Traze will show you how much Stock you have On Hand, Allocated, and how much there is in Total.

UPDATE III

Under the Items tab you may use the Column Manager button on the top left of the table (for more information visit the Search Pages article) to add the Stock: On Hand/Allocated/Total columns seen in the image below:

E ITE	MS	\$ E	BILLIN	IG	🛲 SH	IIPPING	CHARGES/DISCOUNT	S \$ CREDIT CLAIMS	⊗ ATTA	CHMENTS			RATIONS			
			4	0	+ Ad	id 👻 🦩 Ad	tions 🔹 🛱 Transfe	er To 🔹 💲 Charges 💌	\$ Discou	unts 🔻 🔍	Show 🔻	III Labels 🔻	C Quick Entr	y • 🛛 🛛		
P	roduct	: *						Price List				Quantit	у *			
	Alstro	emeri	a Asso	orted	- 10 Stm		Q	Master Price List DENV	ER MPL		~					x 1
	Amoun	t \$0	.00	Tota	I Unit of	Measure 0	Stock: On Hand 45 /	Allocated 121 / Total 16	56							
:=	۰.											_				
	8				No. 🔅	Reference	Name		Quantity 0	On Hand	Stock Allocated	Total	Full Pack Type 🔅	Net Price	Unit Price 🔅	
		(MA)		×	1	ALSAST00	Alstroemeria Assorted -	10 Stm White	2	45	121	166	bu x 10 stm	\$7.600	7.6	bu
		(JP)		×	2	ROSAST40	Rose Assorted 40 CM 25	5 Stm Red	3	0	1	1	bu x 25 stm	\$33.800	33.8	bu
		ø		*	3	ROSAST40	Rose Assorted 40 CM 25	5 Stm Yellow	1	10	0	10	CA x 150 stm	\$1.400	1.4	stm
		(MA)	2	*	4	ALSAST00	Alstroemeria Assorted -	10 Stm	2	45	121	166	bu x 10 stm	\$7.600	7.6	bu
		ø		♦	5	CARAST00	Carnation Assorted - 25	Stm	10	178	27	205	bu x 25 stm	\$15.500	15.5	bu
		ø		*	6	CARAST00	Carnation Assorted - 25	Stm	1	178	27	205	bu x 25 stm	\$15.500	15.5	bu
		ø		♦	7	CARAST00	Carnation Assorted - 25	Stm	10	178	27	205	bu x 25 stm	\$15.500	15.5	bu
															96.90	
															96.90	