



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'll have ready access to 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'll have quick lookup 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 RMA process. Blanket orders can be processed with the addition of the Distribution Requirements Planning (DRP) or Material Requirements Planning (MRP) applications.

Send invoices, statements, order acknowledgements 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 and copy 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 from it.

Print invoices in the customer currency or the company base currency, based on 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 markdowns from average, list, base or calculated prices.



You can use the price calculator to determine the price of items before entering transactions and to provide verbal price quotes to customers.

Process Return Material Authorization (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 that they can be done independently.



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Additional Sales Order Features:

- Generate transaction numbers automatically or manually.
- Convert quotes to live orders easily.
- Generate backorders automatically and track them through final disposition.
- Choose tax-on-freight and/or miscellaneous charges.
- Optionally calculate tax on taxes (for example, for GST/PST in Canada).
- Choose plain paper or preprinted picking slip formats.
- Pay commissions by line item on booked or paid invoices.
- Split commissions between sales reps.
- Apply payments and credits to specific invoices.
- Assess sales taxes using multiple tax locations per tax group.
- Record notes about customer using customer comments
- Get the help you need using the comprehensive, customizable online help system.
- 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 acknowledgement forms
- Print packing slips with quantity shipped and backordered information.
- Enter open-ended recurring entries.
- Print an acknowledgement, picking slip, packing slip or invoice for orders of a certain status.
- Calculate item prices using price matrixes.
- Create customized invoice and dunning messages.

Sales Order Reports:

- Returned Items Journal
- Open Order Report
- Recurring Entries List
- Backorder Allocation Report
- Customer Levels List
- Price Structures List
- Customer Pricing List
- Promotional Pricing List
- Order Acknowledgement
- Picking Slips, Packing Slips, Invoices
- Sales Journal
- Miscellaneous Credits Journal
- Booked Sales Report
- Sales Performance Report