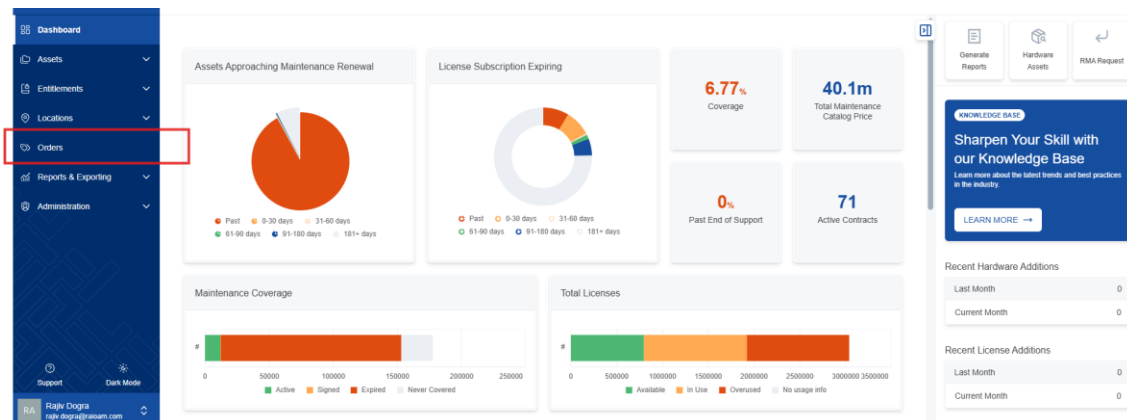


Order Management > View Orders

Accessing the Order Module

- From the main menu, select "Orders".
- Then, click on "View Orders" to access the order module.



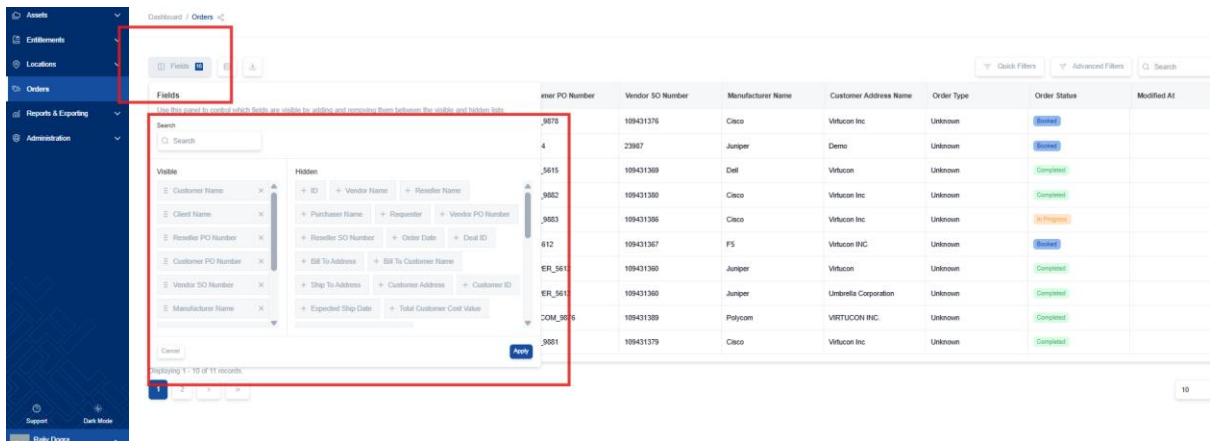
- The order module displays a table of all tracked orders.

The Orders module displays a table of all tracked orders. The table has the following columns: Customer Name, Client Name, Reseller PO Number, Customer PO Number, Vendor SO Number, Manufacturer Name, Customer Address Name, and Order ID. Each row represents an order, and there is a "View" link next to each row.

	Customer Name	Client Name	Reseller PO Number	Customer PO Number	Vendor SO Number	Manufacturer Name	Customer Address Name	Order ID
View	Virtucon Inc	Virtucon	4549009-26	Cisco_9878	109431376	Cisco	Virtucon Inc	Unk
View	Demo	Umbrella Corporation	4500198537	256754	23987	Juniper	Demo	Unk
View	Virtucon	Virtucon	4549009-37	DELL_5615	109431369	Dell	Virtucon	Unk
View	Virtucon Inc	Virtucon	4549009-30	Cisco_9882	109431380	Cisco	Virtucon Inc	Unk
View	Virtucon Inc	Virtucon	4549009-36	Cisco_9883	109431386	Cisco	Virtucon Inc	Unk
View	Virtucon INC	Virtucon	4549009-55	FS_54612	109431367	F5	Virtucon INC	Unk
View	Virtucon	Virtucon	4549009-61	JUNIPER_5612	109431360	Juniper	Virtucon	Unk
View	Umbrella Corporation	Umbrella Corporation	4549009-61	JUNIPER_5612	109431360	Juniper	Umbrella Corporation	Unk
View	VIRTUCON INC.	Virtucon	4549009-64	POLYCOM_9876	109431389	Polycorn	VIRTUCON INC.	Unk

Customizing the Order Table

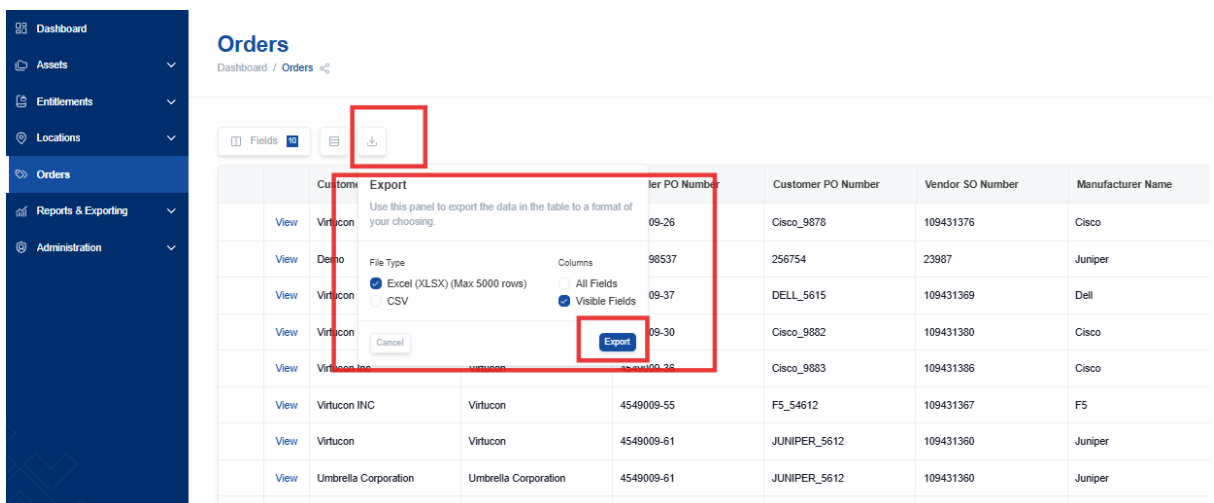
Users can customize the table view to display the most relevant information by selecting different fields to be visible or hidden.



- Choose from available options to tailor the displayed information, ensuring you see only what you need.

Exporting Order Data

Order data can be exported for external use and analysis in Excel or CSV formats.



Filtering Orders

Apply filters to quickly find specific orders based on your criteria.

- Use quick filters for common searches.
 - Quick filters provide pre-defined options for fast and easy filtering.
- Utilize advanced filters for more specific and complex criteria.
 - Advanced filters allow you to combine multiple criteria and create highly targeted searches.

[Detailed, fully explained actions and steps for improving the filtering and viewing of specific data sets are available in another section of this manual: “Quick and Advanced Filters.”]

ACME Inc

Dashboard

Assets

Endpoints

Locations

Orders

Reports & Exporting

Administration

Global Search

CRM - K

Orders

Dashboard / Orders

Quick Filters

Advanced Filters

Search

	View	Columns	Order PO Number	Customer PO Number	Vendor SO Number	Manufacturer Name	Customer Account Name	Order Type	Order Status	Received At
View	Wilson		09-26	Cisco_3675	109433375	Cisco	Wilson Inc	Unknown	Shipped	
View	Demo	File Type	86537	254754	23967	Juniper	Demo	Unknown	Shipped	
View	Wilson	Excel (XLSX) (Max 5000 rows) CSV	09-37	DELL_5415	109433389	Dell	Wilson	Unknown	Completed	
View	Wilson	Vendor Fields	09-38	Cisco_3682	109433390	Cisco	Wilson Inc	Unknown	Completed	
View	Wilson Inc	Cancel	4548009-36	Cisco_3683	109433396	Cisco	Wilson Inc	Unknown	On Progress	
View	Wilson INC		4548009-05	FL_5412	109433387	FS	Wilson INC	Unknown	Shipped	
View	Wilson		4548009-61	JUNIPER_5412	109433390	Juniper	Wilson	Unknown	Completed	
View	Umbrella Corporation		4548009-61	JUNIPER_5412	109433390	Juniper	Umbrella Corporation	Unknown	Completed	
View	VERTECON INC		4548009-64	POLYCOM_5675	109433389	Polycom	VERTECON INC	Unknown	Completed	
View	Wilson Inc		4548009-29	Cisco_3681	109433379	Cisco	Wilson Inc	Unknown	Completed	

Displaying 1 - 10 of 10 records

1 2 3 4

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