



Product: ODTView


Subject: Basic Overview of Delivery and Orders Tab

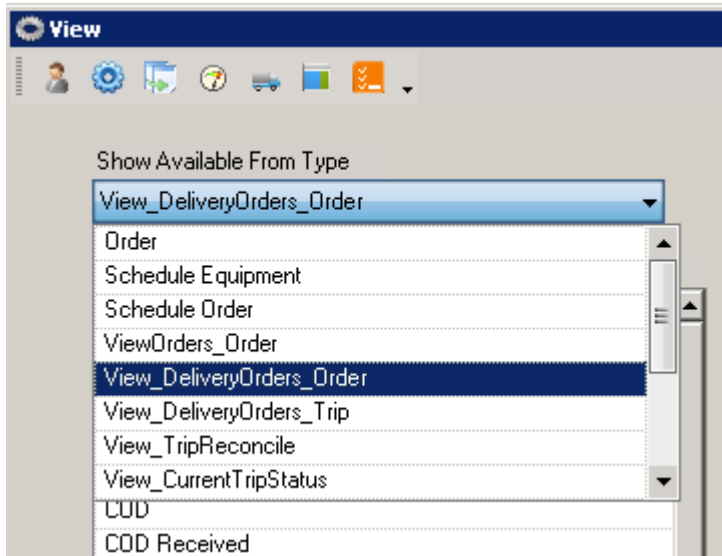
Version:

December 6, 2016

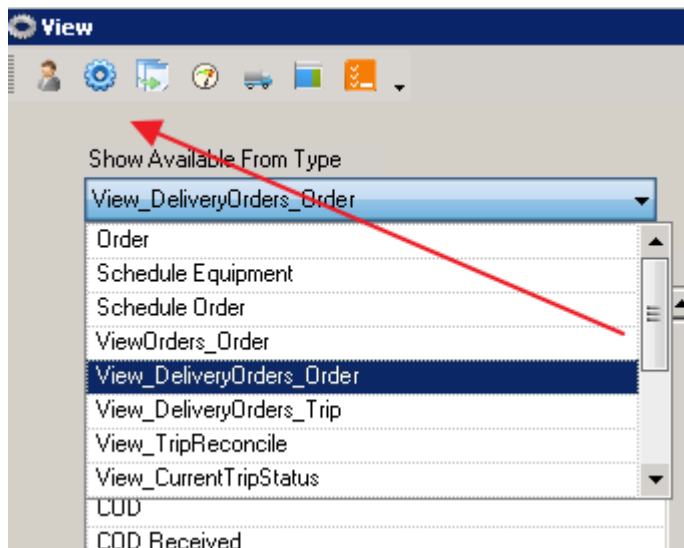
Distribution: Customer

Setting Up Delivery and Orders Tab

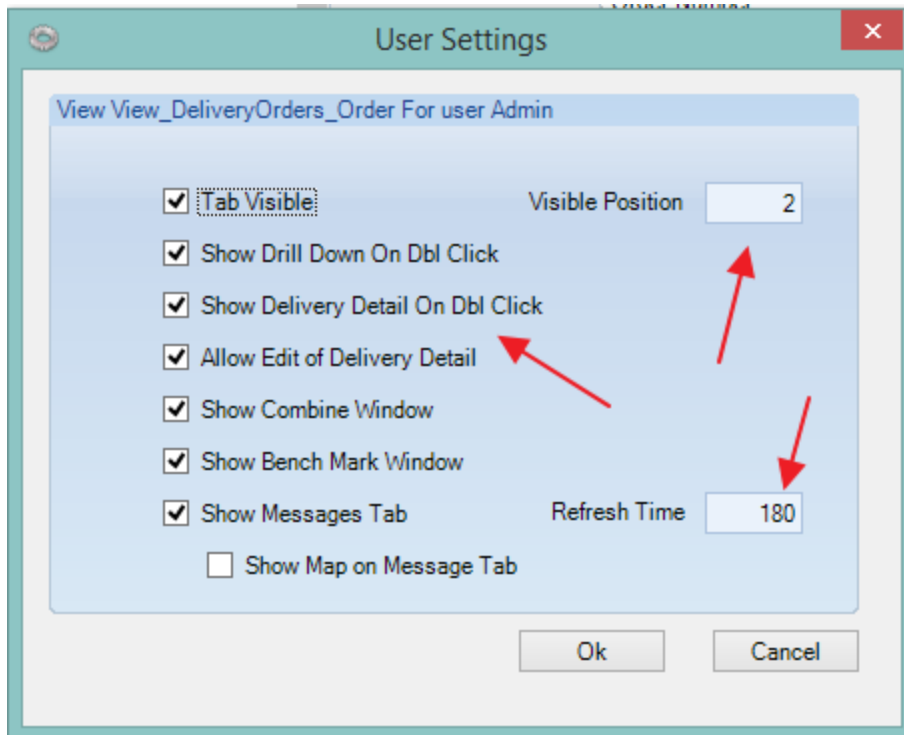
- Log into ODT Viewer with an Admin user
- Navigate to the wrench icon 
- Choose ViewDeliveryOrders_Order from the Show Available Form Type drop down



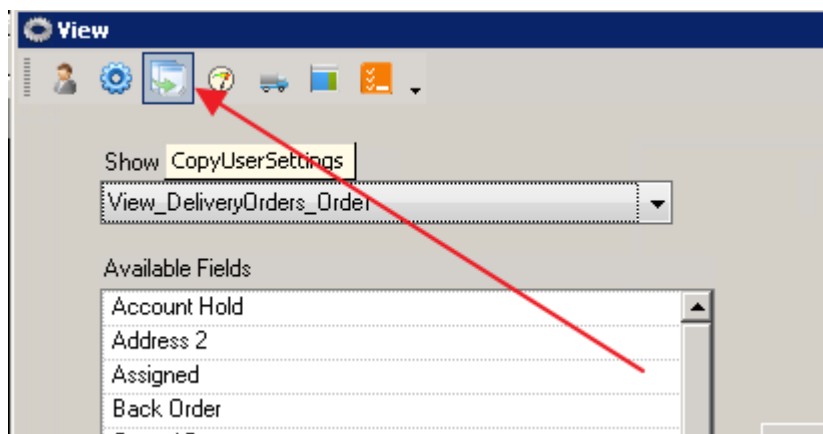
- Choose the Gear Icon from the toolbar (Set Form Property)



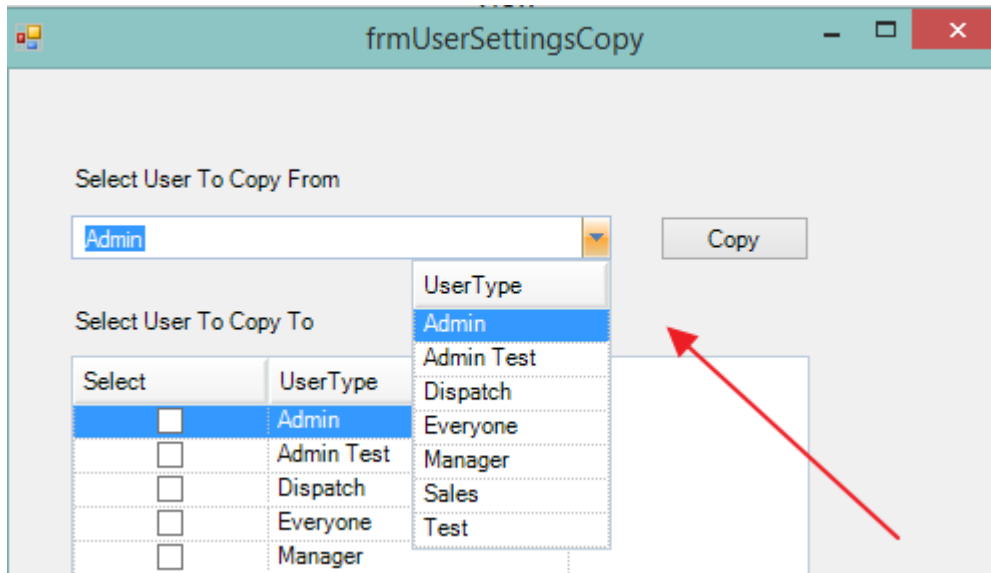
- Choose the following options from the ViewDeliveryOrders_Order For user Admin
 - Tab Visible
 - Show Drill Down on Dbl Click
 - Show Delivery Edit on Dbl Click
 - Allow Edit of Delivery Detail
 - Show Combine Window
 - Show Bench Mark Window
 - Show Messages Tab – if applicable
 - Enter 2 in the visible position box
 - Refresh Time – recommended between 120-180 seconds
 - Then Choose Ok



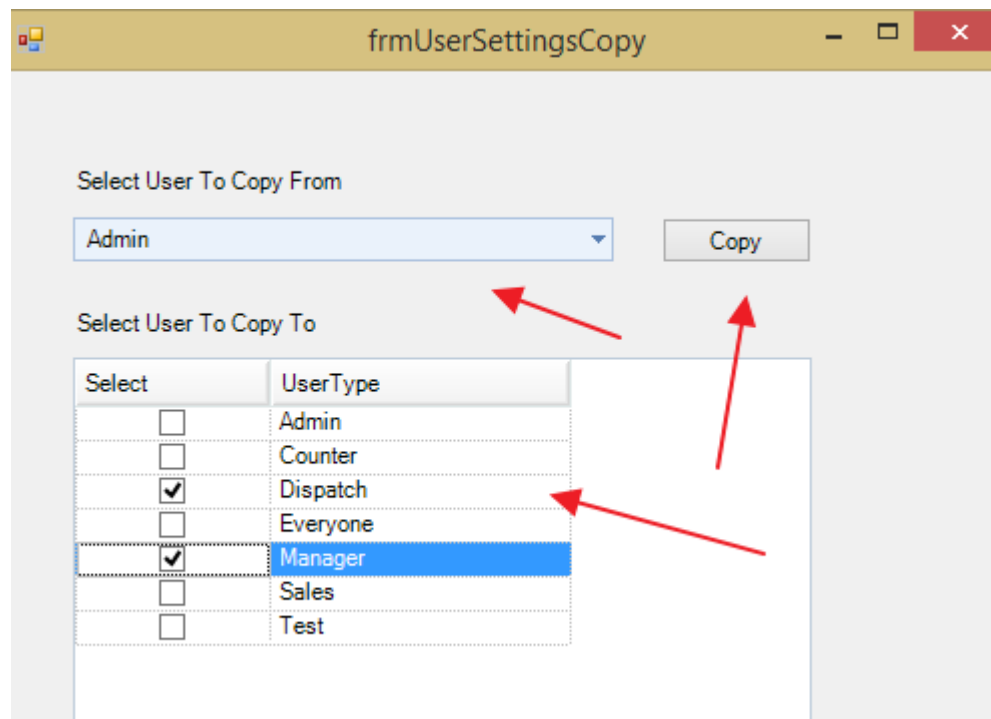
- To copy setups for different user types choose the Paper icon (Copy User Settings) from the toolbar



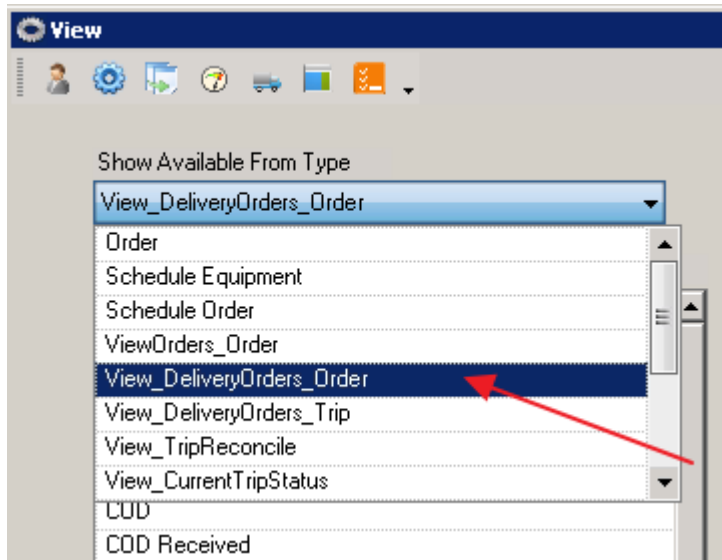
- Choose Admin from the Select User to Copy From drop down



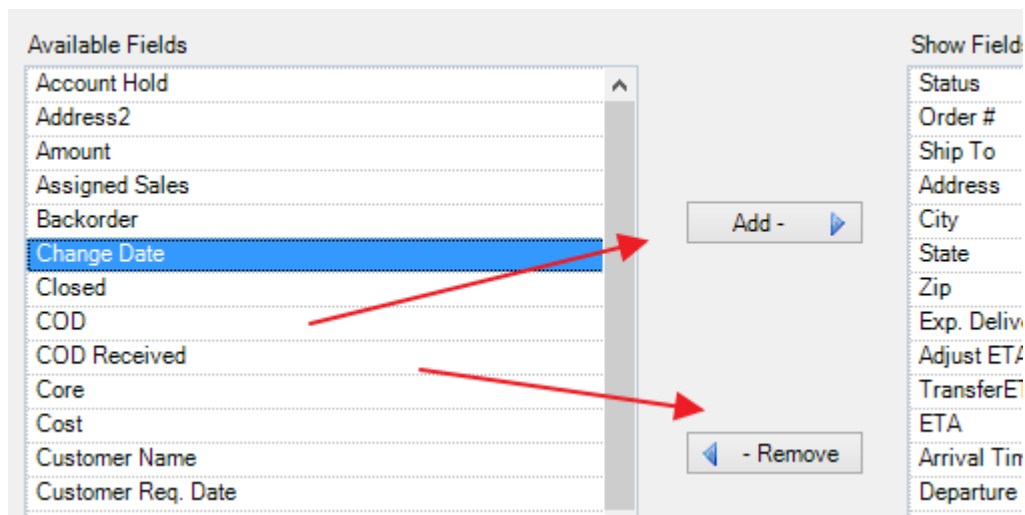
- Select User Type(s) to copy to
 ***Recommend selecting Dispatch and Manager
- Choose Copy, select OK and then choose Close



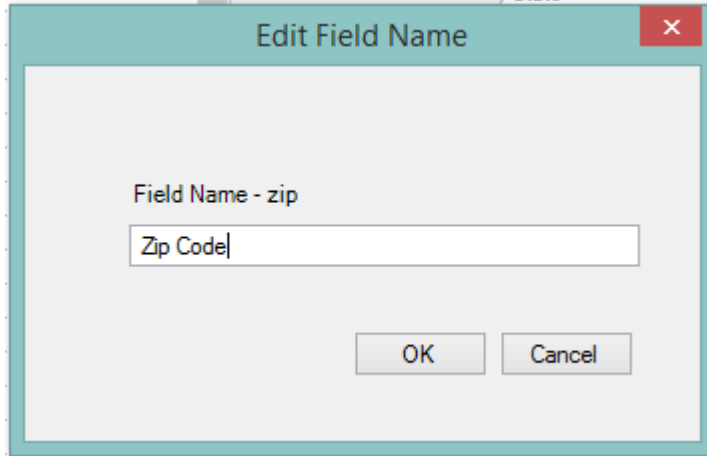
- To choose the columns to view in the orders grid select ViewOrders_Order from the Show Available From Type in the drop down box



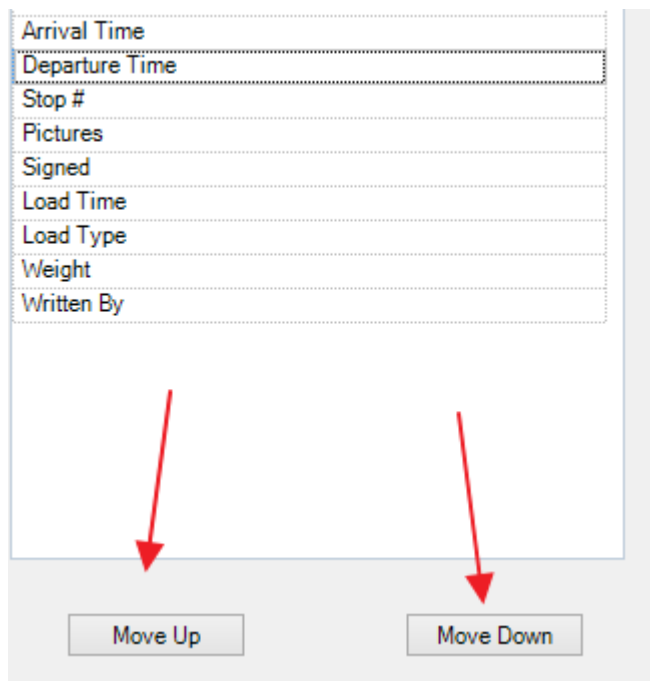
- To select columns to show on the Delivery and Order grid highlight the available field and choose the Add button.
- To remove a column to show on the Delivery and Order Grid highlight the available field and choose Remove button



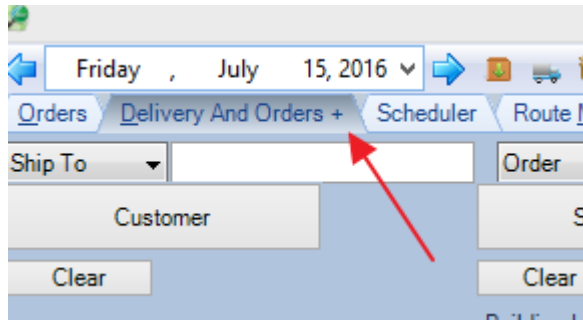
- To customize a column name double click on one of the columns assigned in the Show Fields – Odtview. Delete the existing name and enter the customized name
 - For example, change zip to Zip Code and choose OK



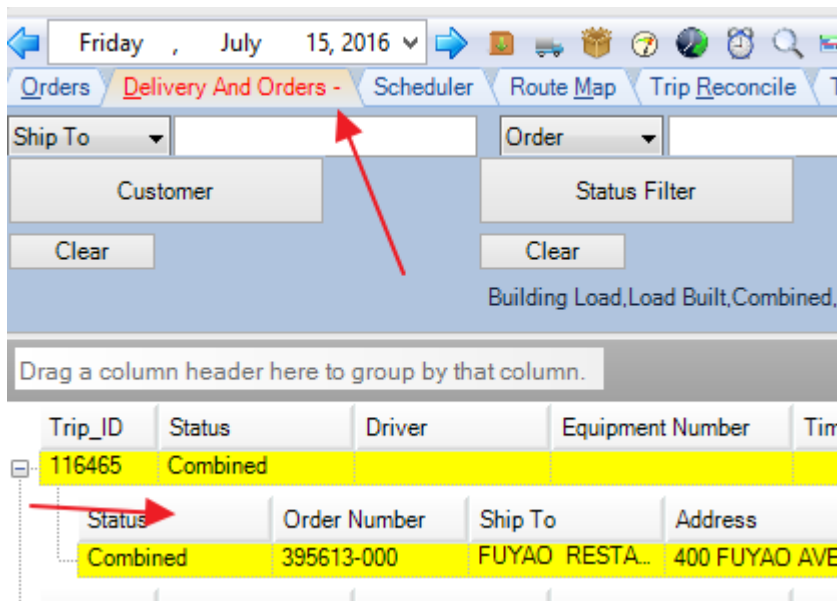
- To move a column choose Move Up or Move Down. How the fields show on the Show Fields – OdtView DelOrder Order is the order they will appear on the Delivery and Orders grid. Choose OK when all changes have been completed.



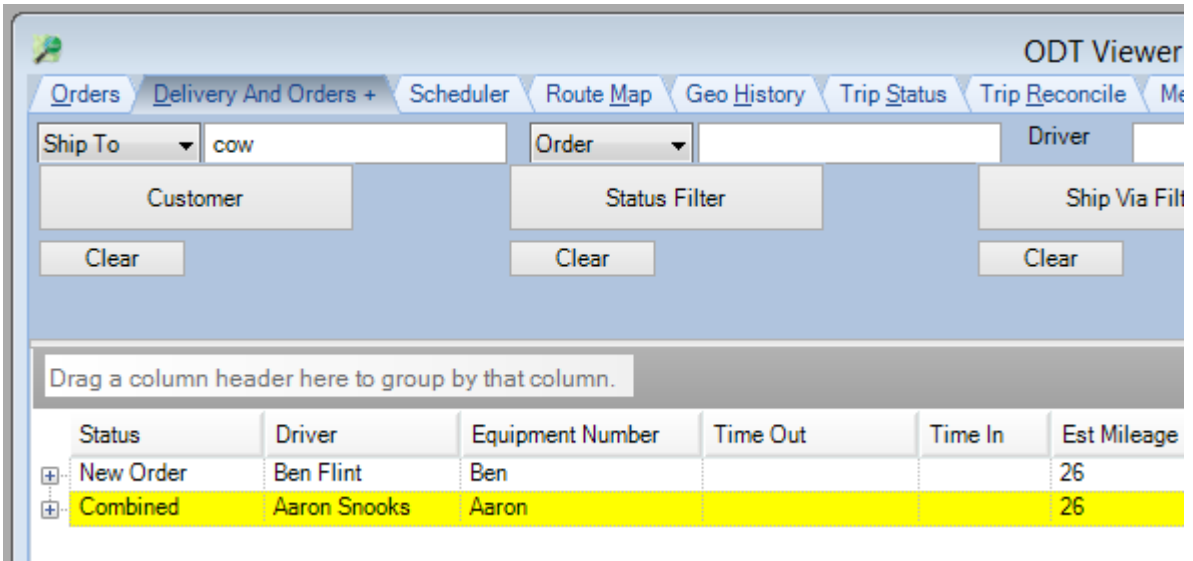
- To expand all orders on a trip on the Delivery and Orders grid click the arrow to expand the trip on the Delivery and Orders tab.



- Once expanded the Delivery and Orders tab will show red and all trips will be expanded

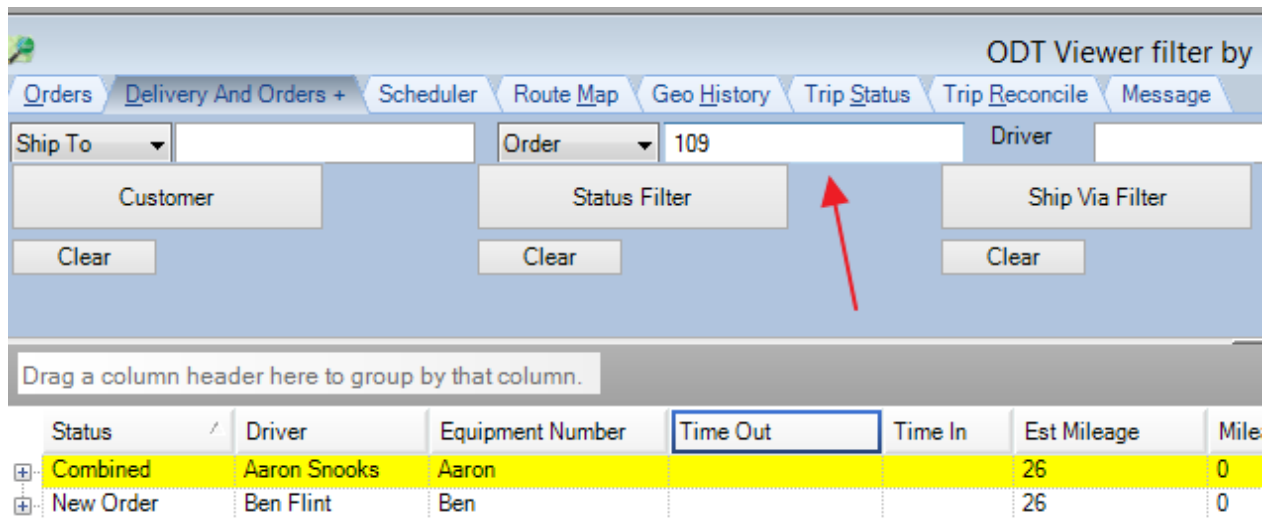


- To search by Ship To enter the Ship To name. Typing the first few letters will bring up Ship To names and the Grid will display orders for that Ship To

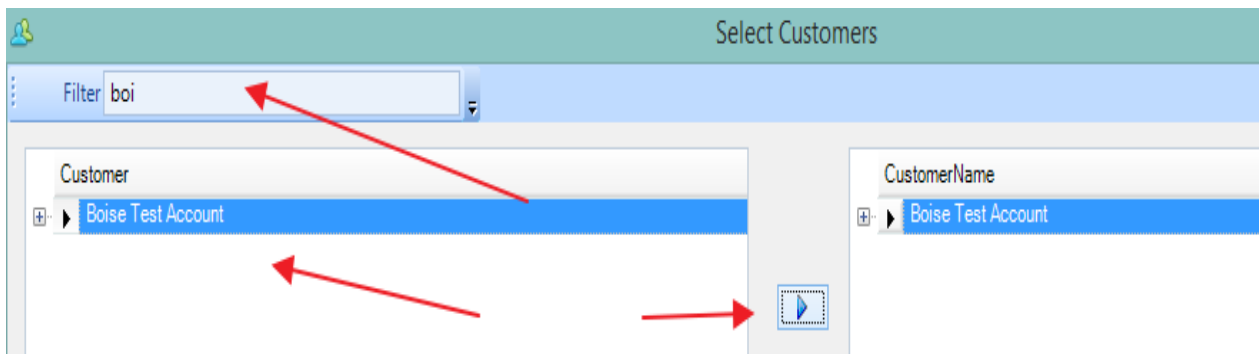
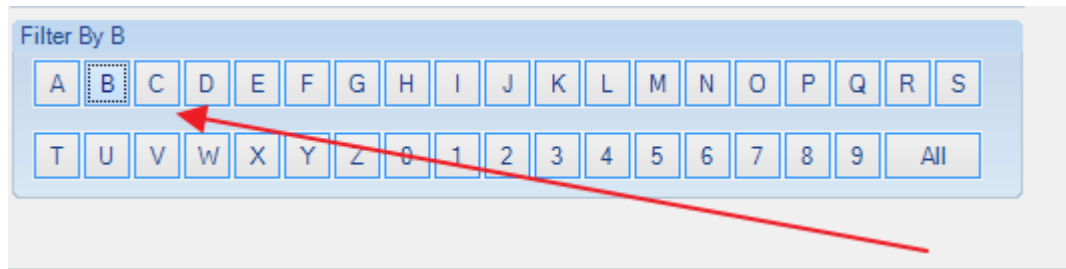


- Order #

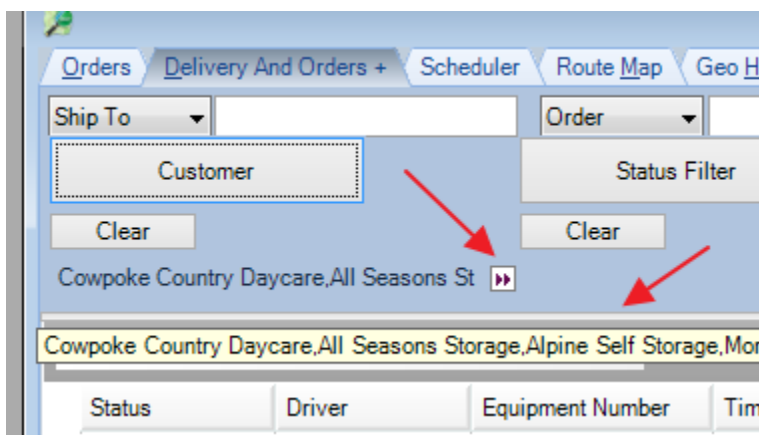
- To search by Order # enter the number into the Order # field the first few numbers will bring up any order or invoice with those numbers. To search for one Order # enter the entire number in the search field.



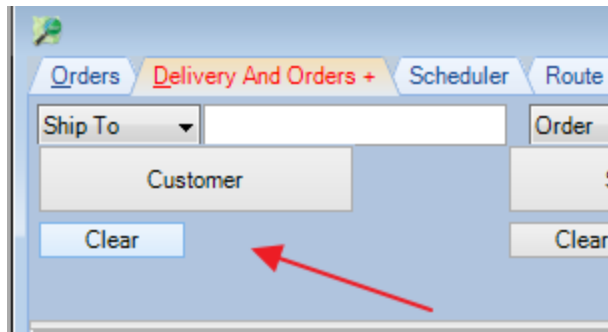
- Customer
 - To filter by just one customer, choose the first letter of the customer name and to filter out just one customer enter the first few letters of the customer name and only that customer will show on the grid.
 - Once you have selected the customer highlight the customer name and use the right arrow to move the customer to the customer name section. Then choose Apply and Ok



- Then choose Apply and OK and any and all ship to's for that customer will fill the Orders grid
- Hovering over or selecting the double arrow will show all ship to's for that customer filter

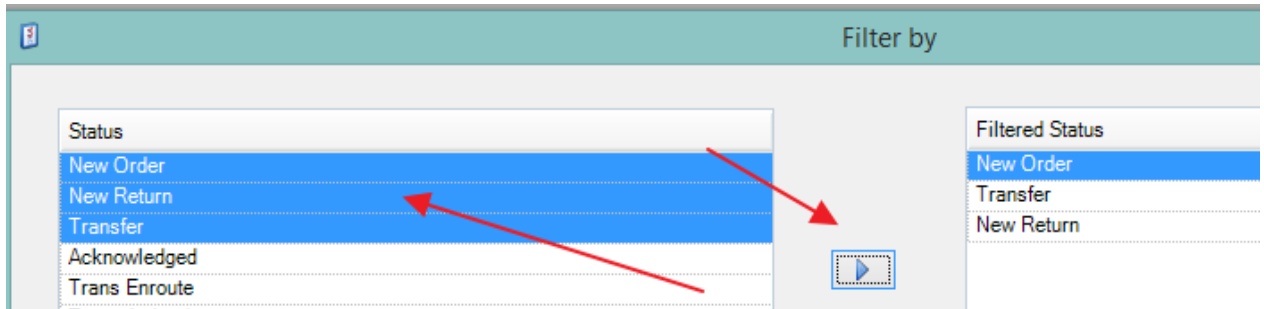


- To clear the filter, choose the Clear button located under the Customer filter option

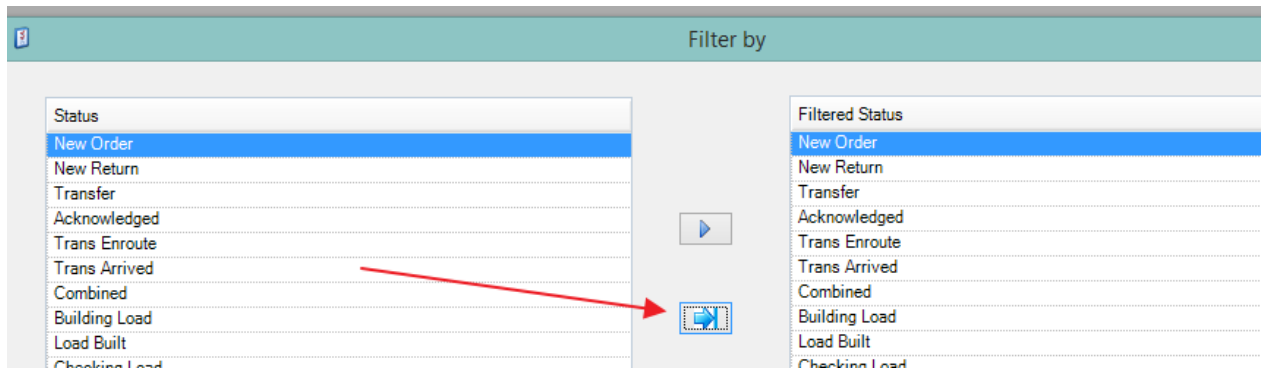


○ Status

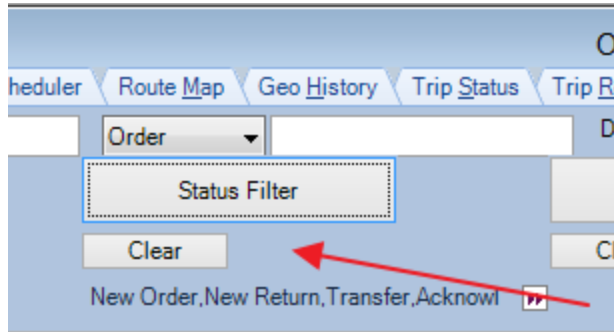
- To filter by just one Status, choose the status. To choose more than one status hold down the CTRL key and choose the status and then choose the right arrow and choose apply and ok.



- To filter by all statuses, choose the copy all arrow and then choose apply and ok

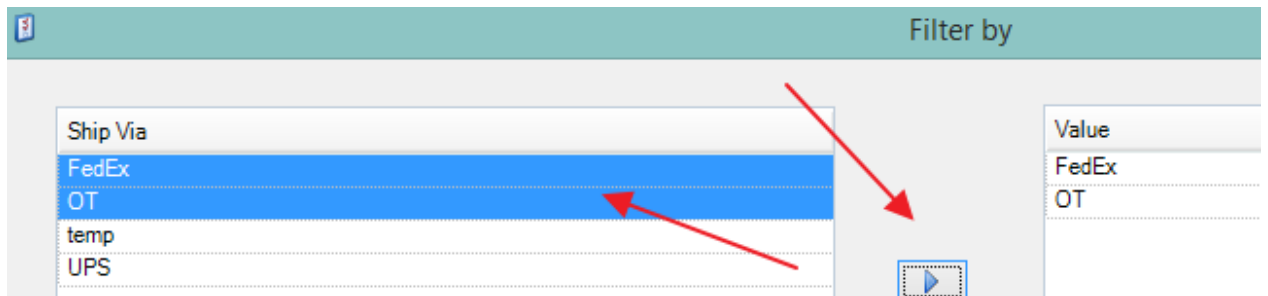


- Selecting the Clear button will clear the Status filter

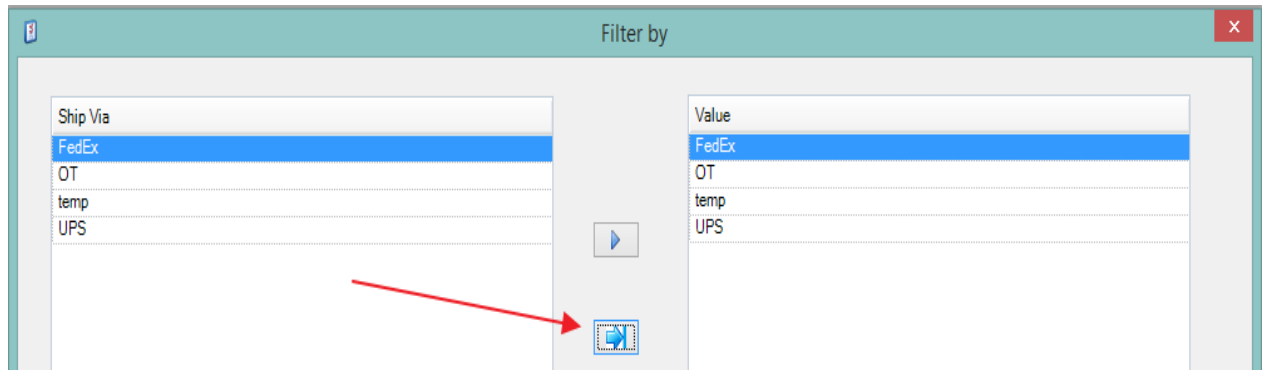


- Ship Via

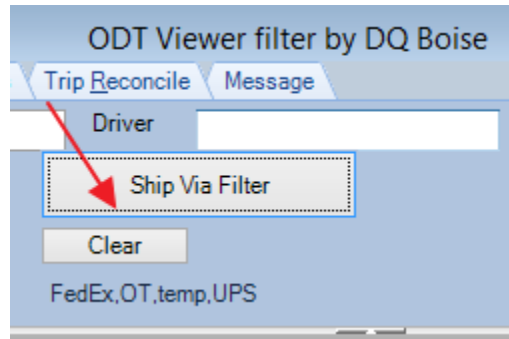
- To filter by just one Ship Via, choose the Ship Via. To choose more than one status hold down the CTRL key and choose the status and then choose the right arrow and choose apply and ok.



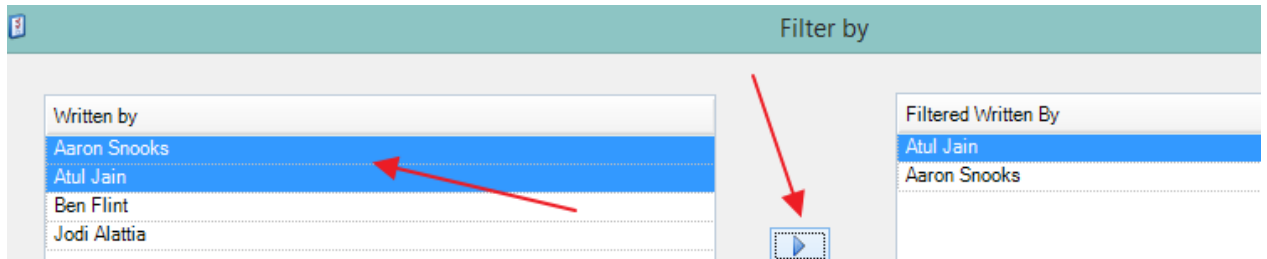
- To filter by all Ship Via's, choose the copy all arrow and then choose apply and ok



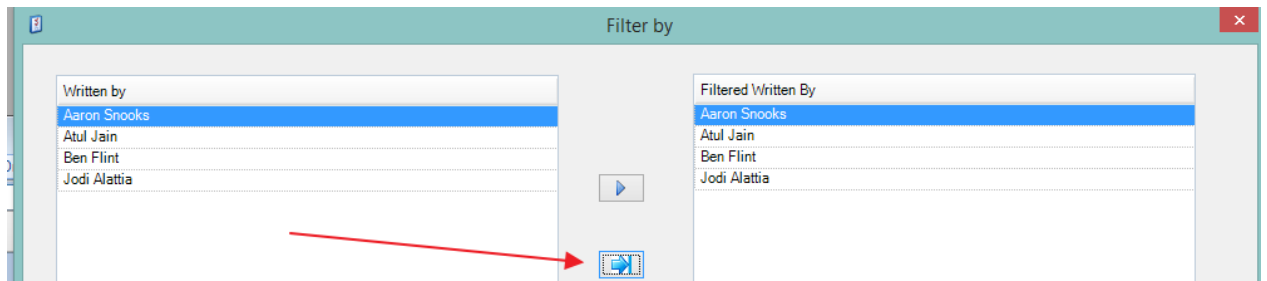
- Selecting the Clear button will clear the Ship Via filter



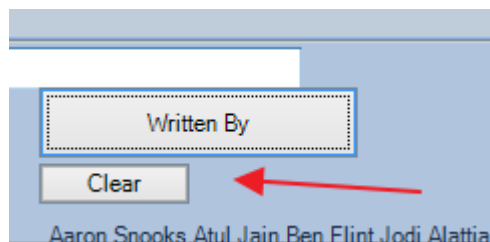
- Written By
 - To filter by just person to see which orders were written by them, choose the person you want to filter. To choose more than one Written by hold down the CTRL key and choose the written by and then choose the right arrow and choose apply and ok.



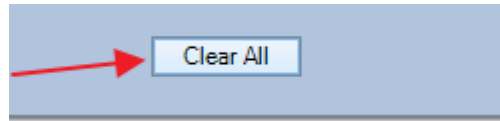
- To filter by all Written By, choose the copy all arrow and then choose apply and ok



- Selecting the Clear button will clear the Written By filter



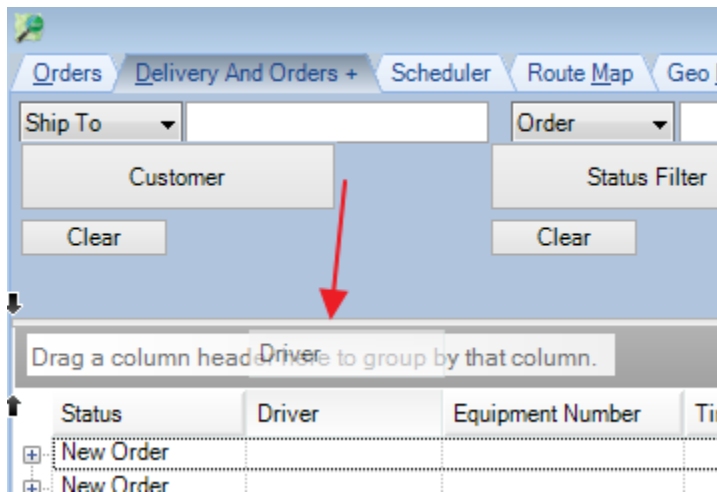
- The Clear All button clears all filters.



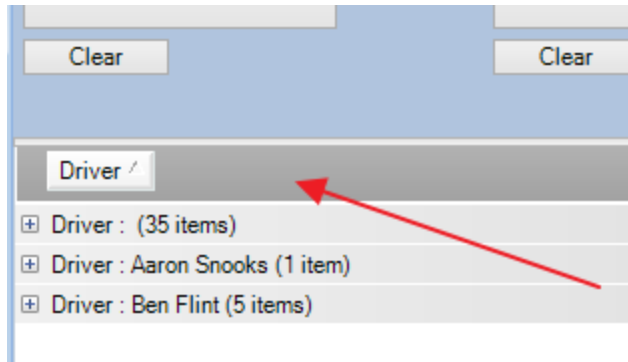
- To order each column (ascending or descending) double click on the column header. The Arrow displays what order the column is in ascending is low to high and descending high to low.

Driver	Equipment Number
Jill Kinman locati...	Jodi

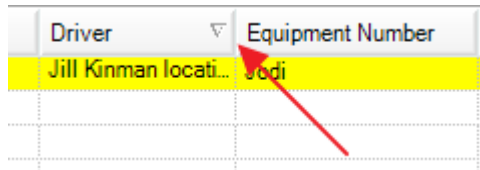
- You can drag and drop a column header to group by that item



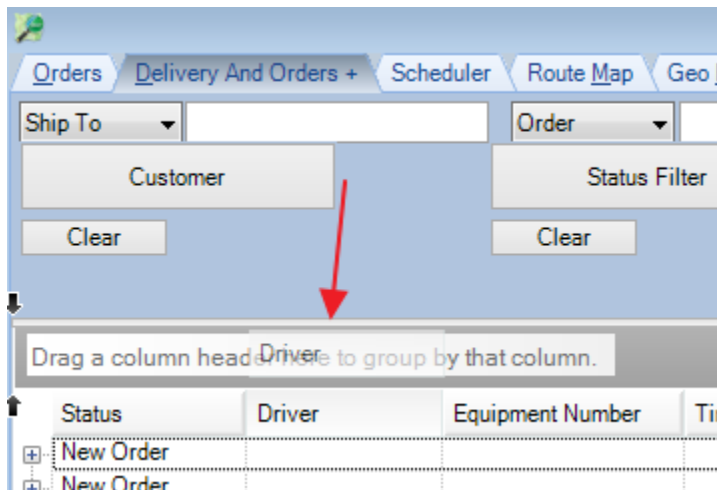
- Once you drag and drop the column name the grid with sort by that grouping. The grouping in the grid will tell you how many trips are grouped in each grouped section. To ungroup drag and drop the column name back to the delivery and order grid



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