



Product: ODTView


Subject: Basic Overview of Order Tab

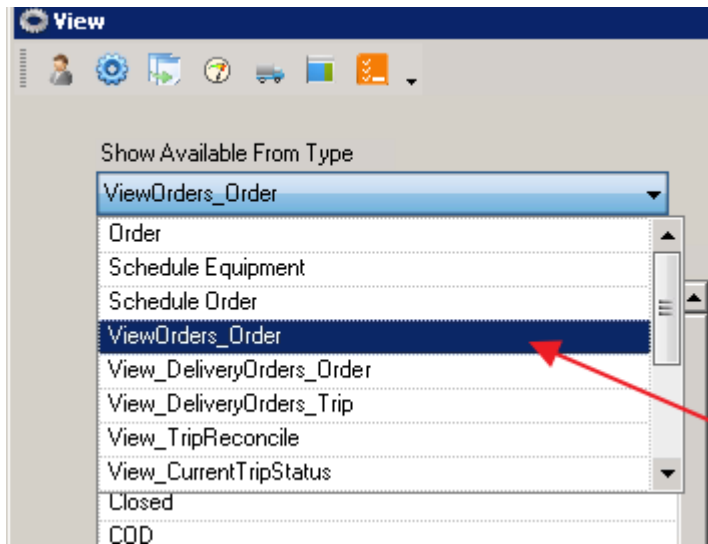
Version:

December 6, 2016

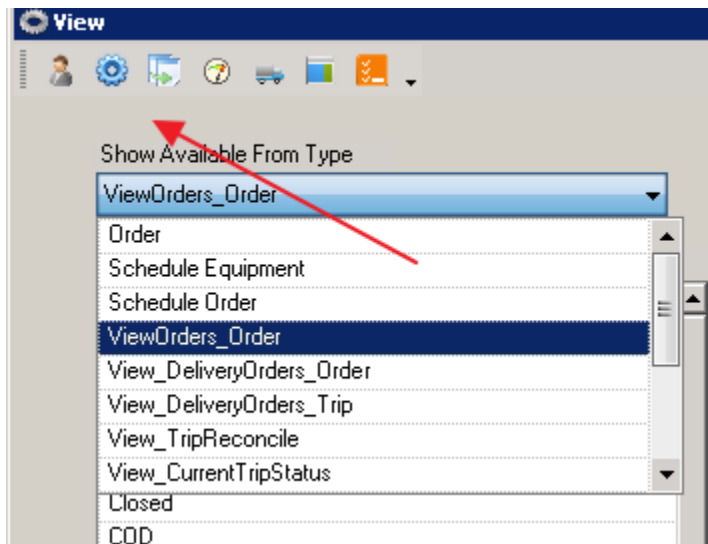
Distribution: Customer

Setting Up Order Tab

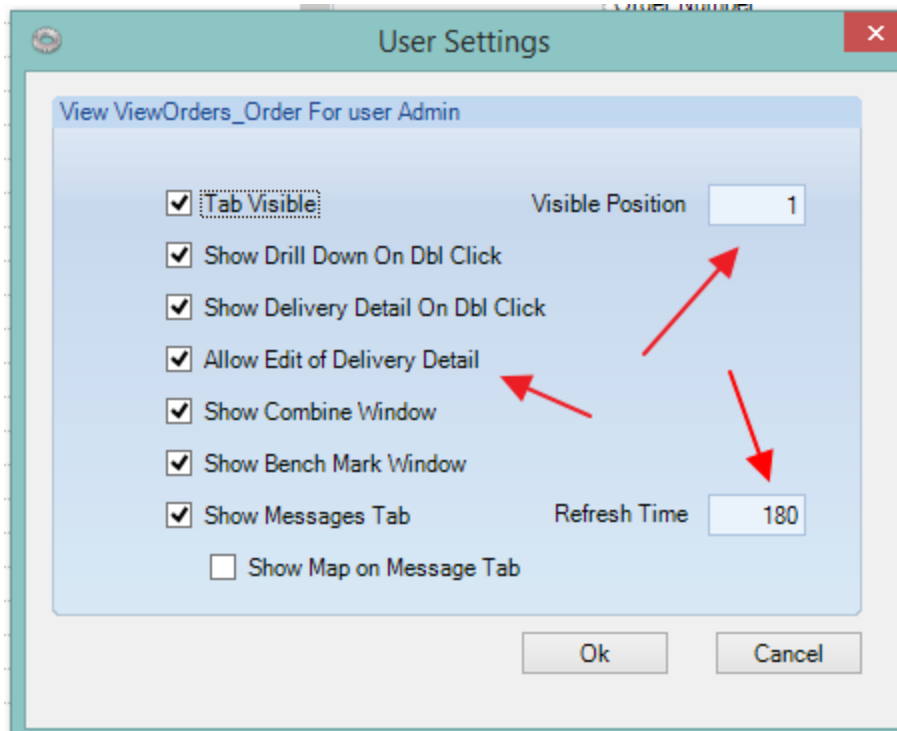
- Log into ODT Viewer with an Admin user
- Navigate to the wrench icon 
- Choose ViewOrders_Order from the Show Available Form Type drop down



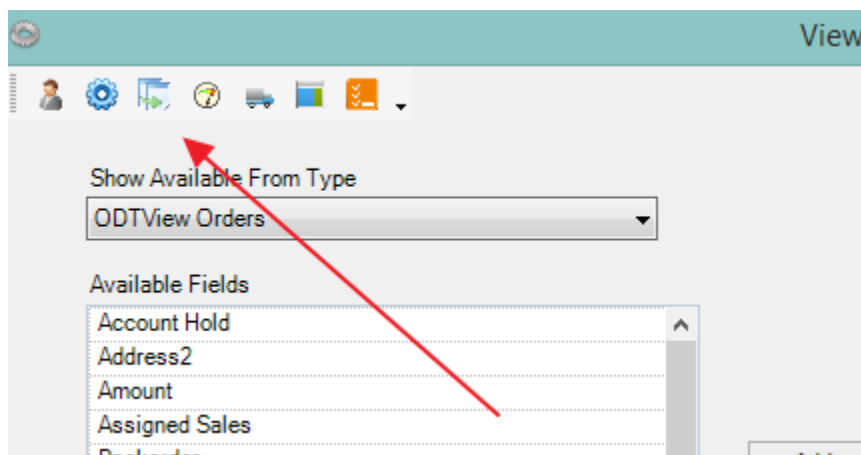
- Choose the Gear Icon from the toolbar (Set Form Property)



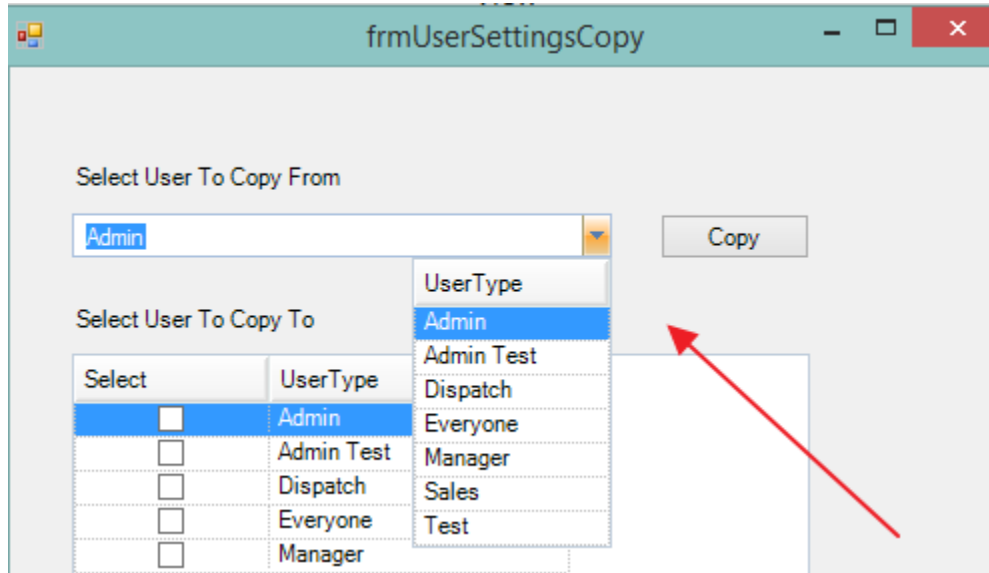
- Choose the following options from the View Orders_Order For user Admin
 - Tab Visible
 - Show Drill Down on Dbl Click
 - Show Delivery Detail on Dbl Click
 - Allow Edit of Delivery Detail
 - Show Combine Window
 - Show Bench Mark Window
 - Show Messages Tab – if applicable
 - Enter 1 in the visible position box
 - Refresh Time – recommended between 120-180 seconds
 - Then Choose Ok



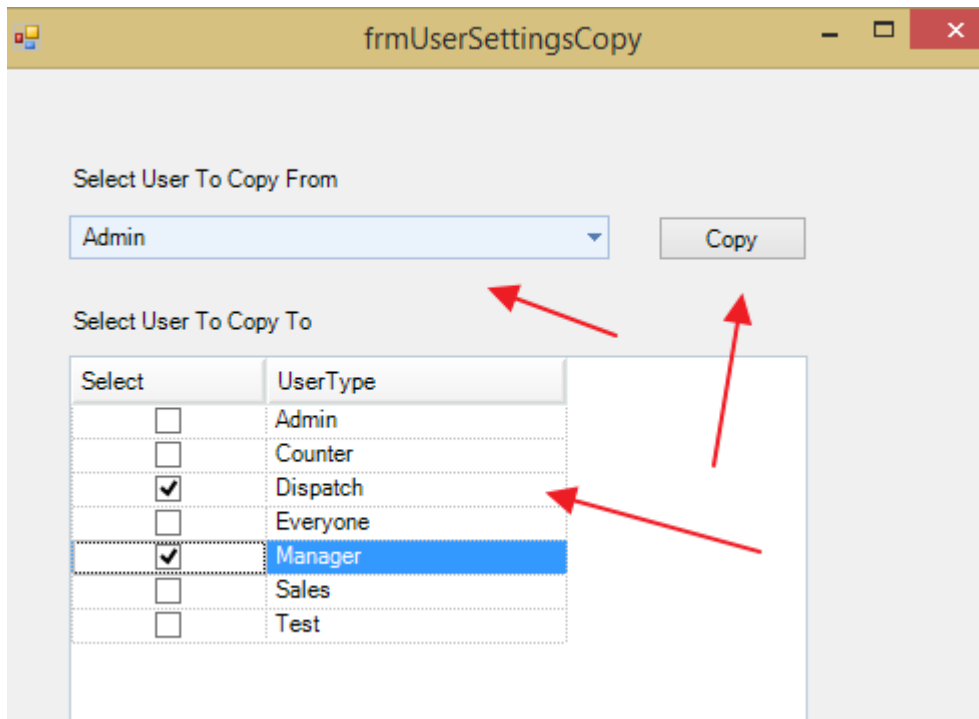
- To copy setups for different user types choose the Paper icon (Copy User Settings) from the toolbar



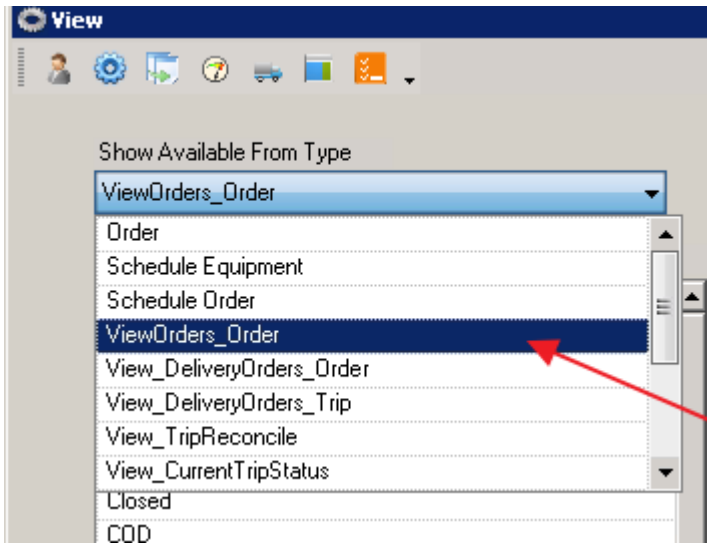
- Choose Admin from the Select User to Copy From drop down



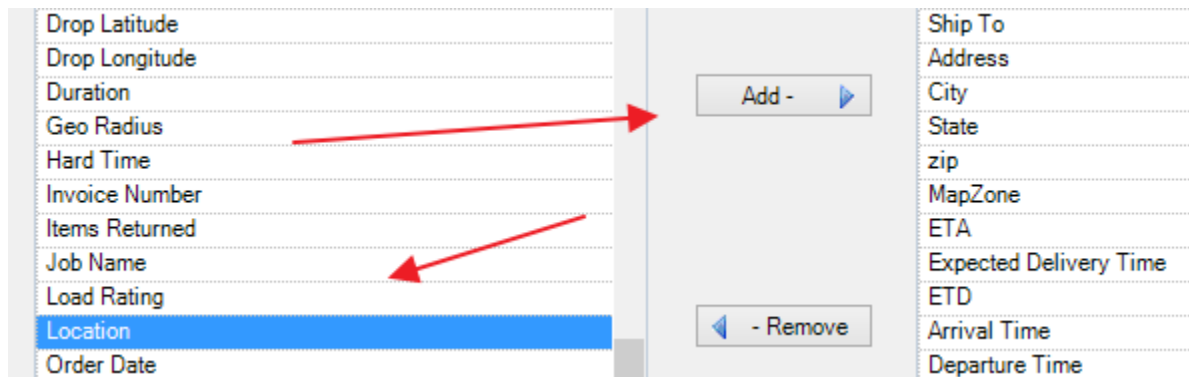
- Select User Type(s) to copy to
***Recommend selecting Dispatch and Manager
- Choose Copy, select OK and then choose Close



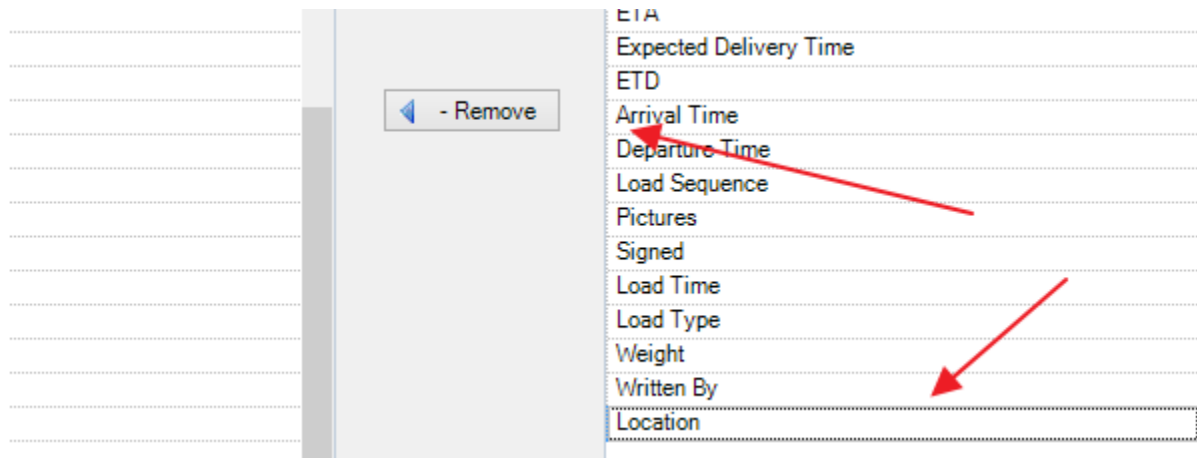
- To choose the columns to view in the orders grid select ViewOrders_Order from the Show Available From Type in the drop down box



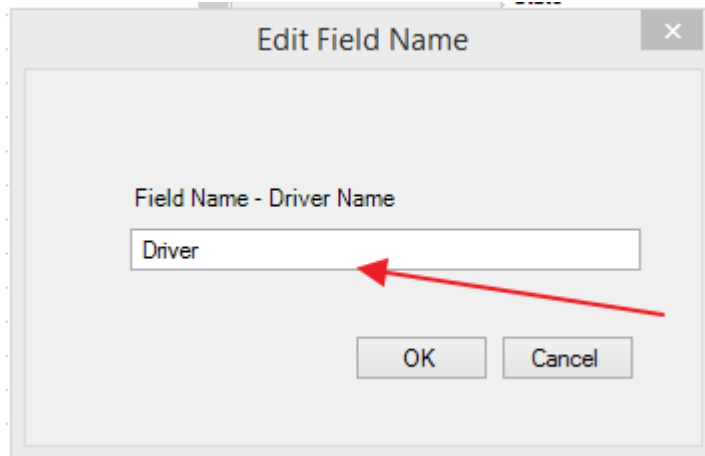
- To select columns to show on the Order grid highlight the available field and choose the Add button.



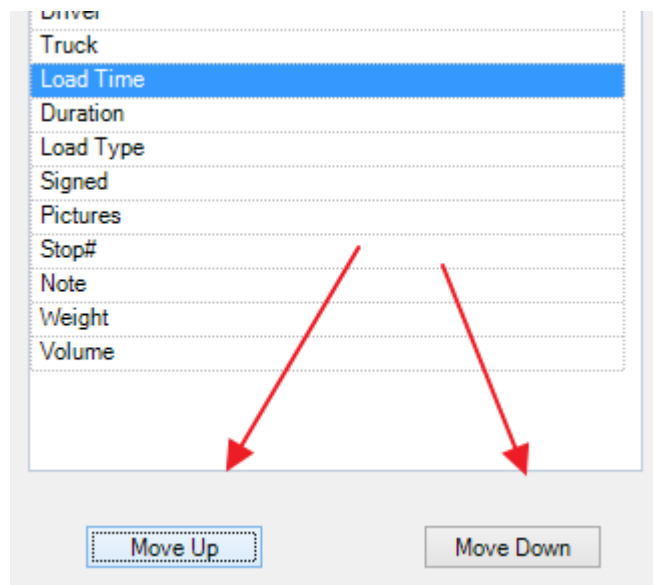
- To remove a column to show on the Order Grid highlight the available field and choose Remove button.



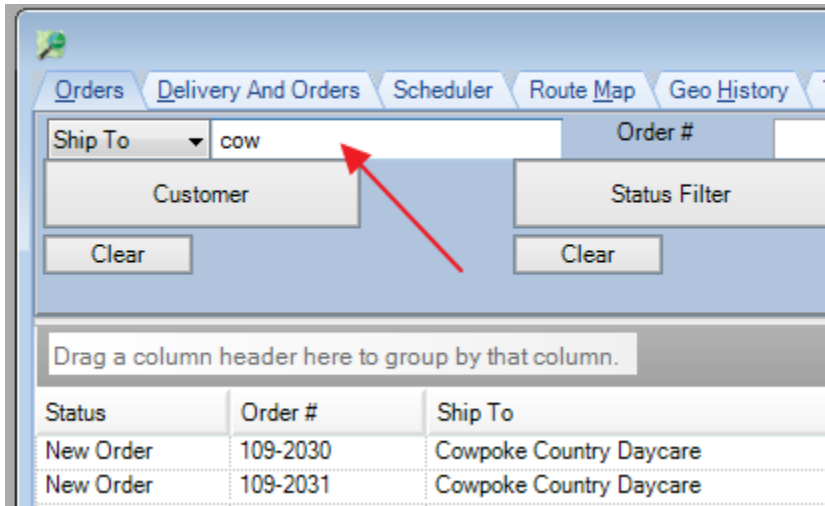
- To customize a column name double click on one of the columns assigned in the Show Fields – Odtview. Delete the existing name and enter the customized name
 - For example, change Driver Name to Driver and choose OK



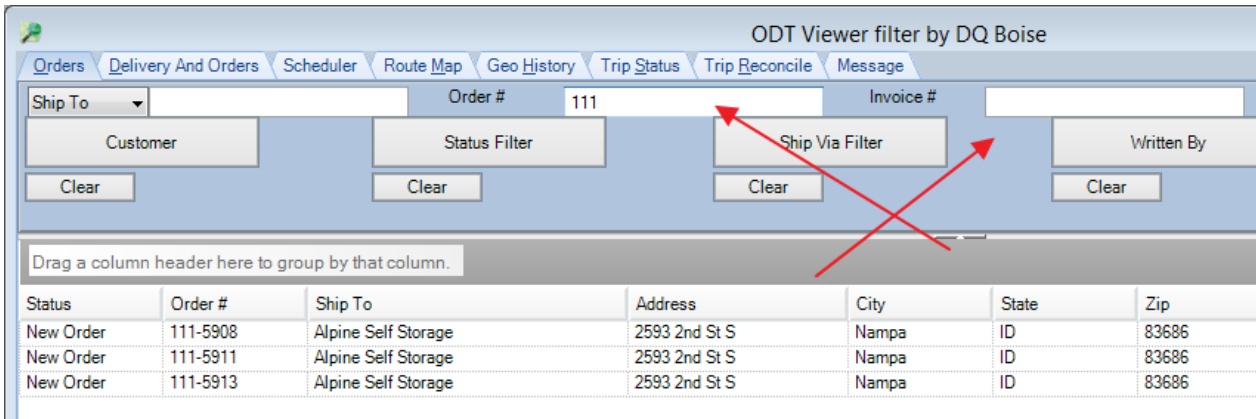
- To move a column choose Move Up or Move Down. How the fields show on the Show Fields – OdtView Orders is the order they will appear on the Orders grid. Choose OK when all changes have been completed.



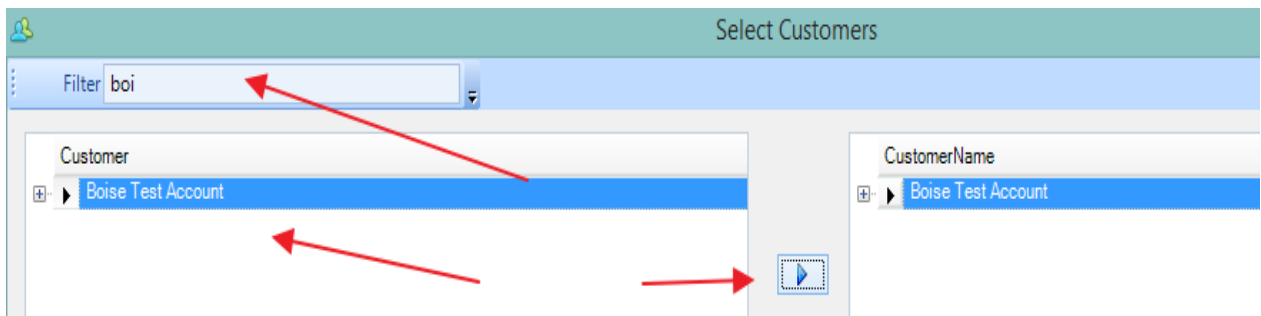
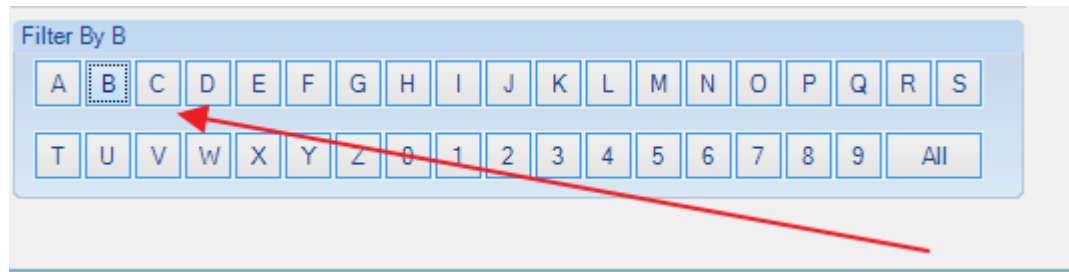
- To search by Ship To enter the Ship To name. Typing the first few letters will bring up ship to names and the Grid will show orders that Ship To



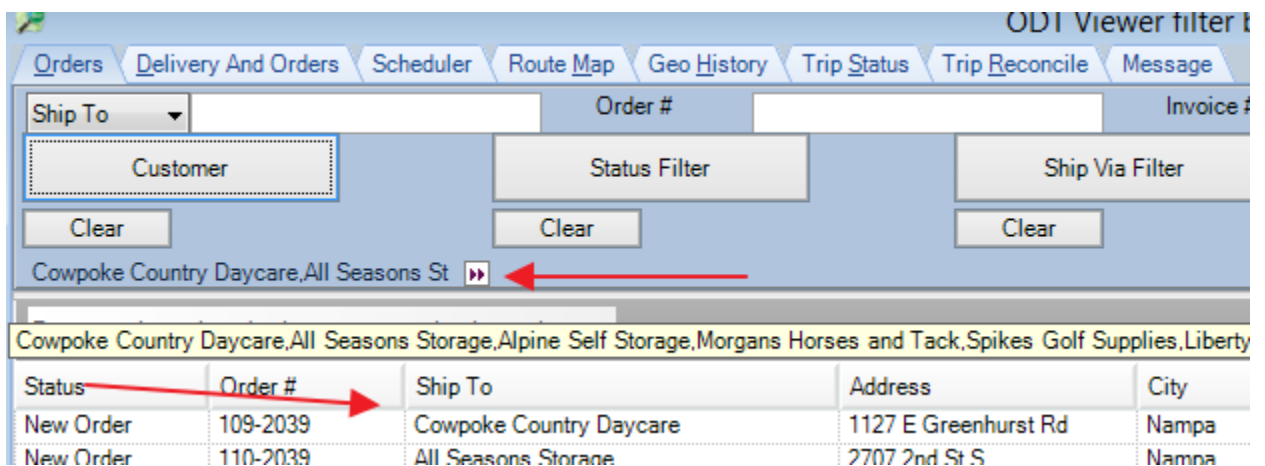
- Order # or Invoice #
 - To search by Order # or Invoice # enter the number into the Order # or Invoice # field the first few numbers will bring up any order or invoice with those numbers. To search for one Order # or Invoice # enter the entire number in the search field.



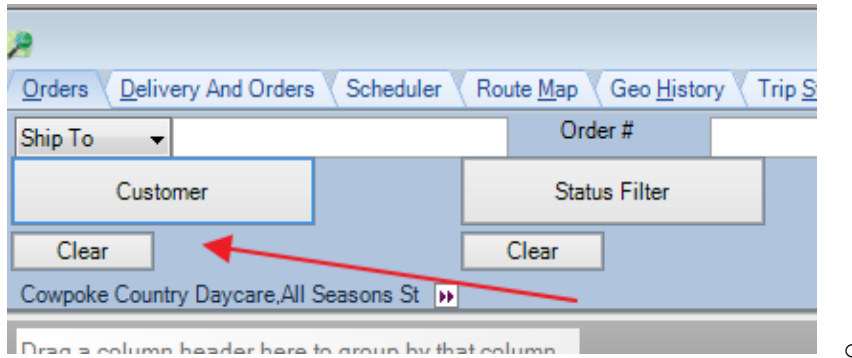
- Customer
 - To filter by just one customer, choose the first letter of the customer name and to filter out just one customer enter the first few letters of the customer name and only that customer will show on the grid.
 - Once you have selected the customer highlight the customer name and use the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



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

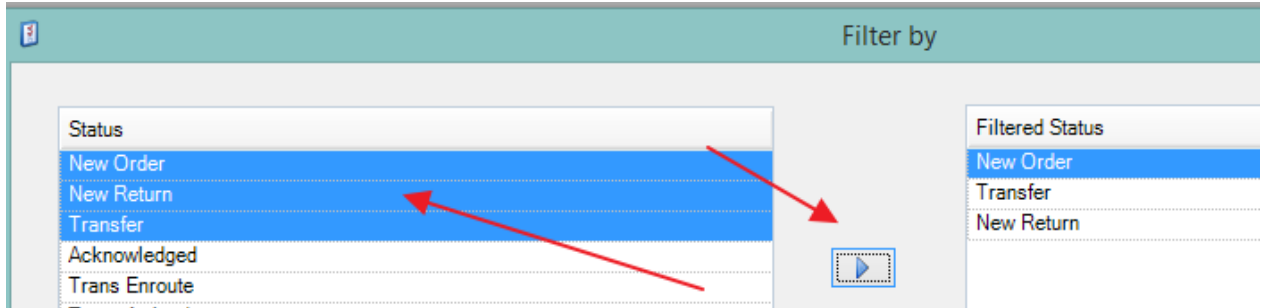


- To clear the filter, choose the Clear button located under the Customer filter option

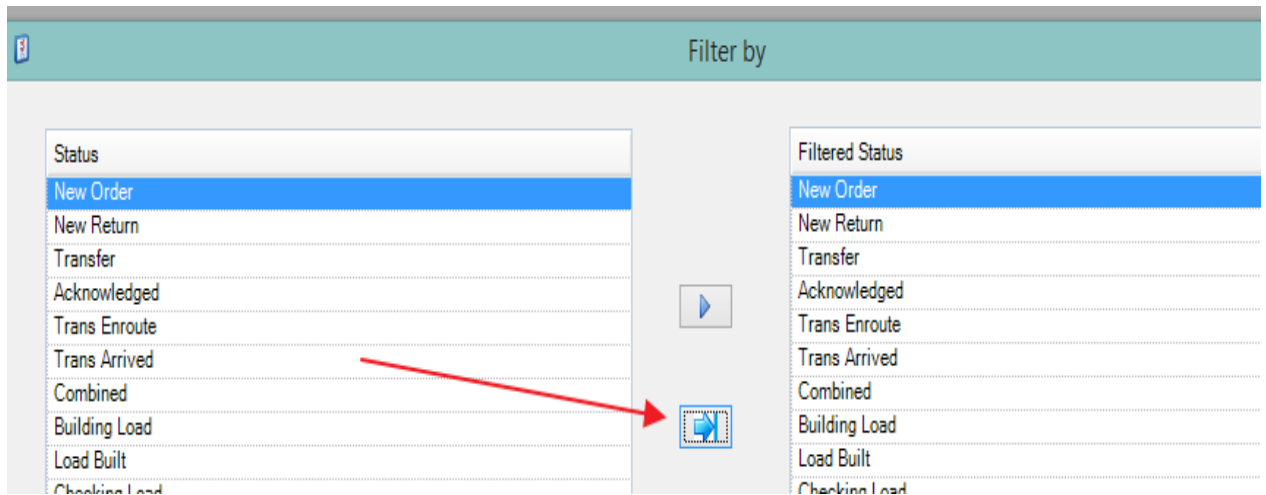


○ Status

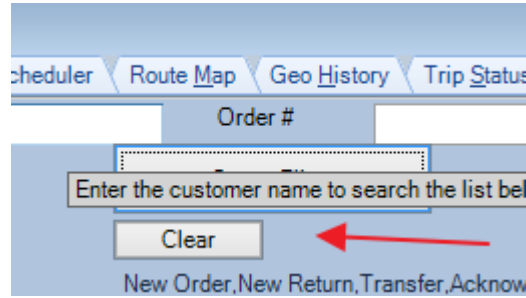
- To filter by just one Status, choose the status. To choose more than one status hold down the CTRL key and choose the status and then choose the right arrow and choose apply and ok.



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

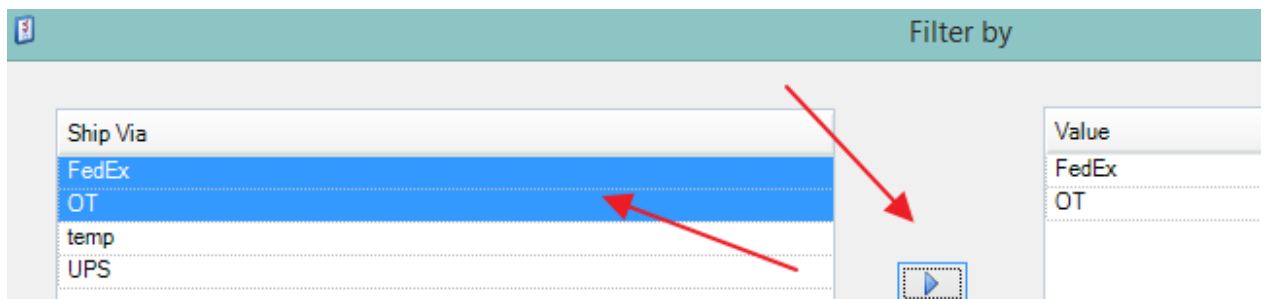


- Selecting the Clear button will clear the Status filter

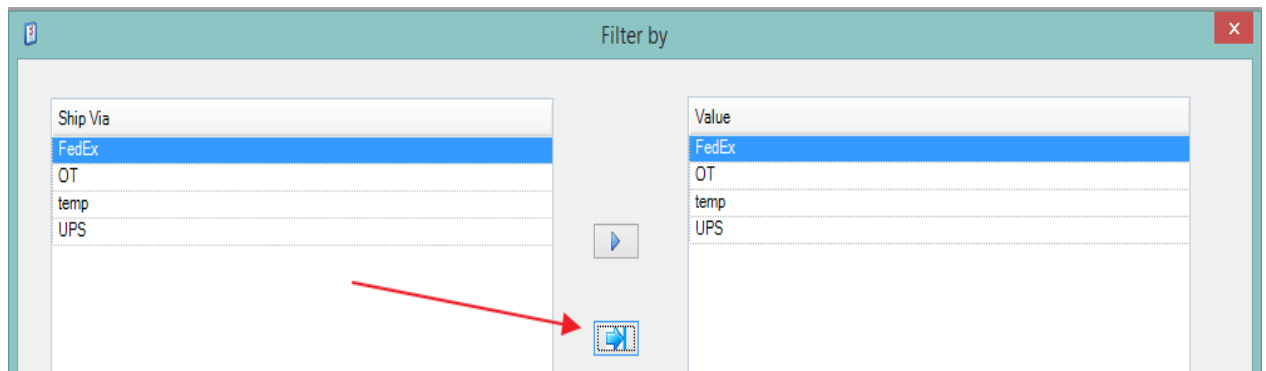


- Ship Via

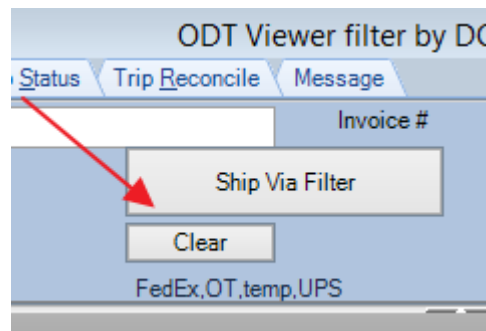
- To filter by just one Ship Via, choose the Ship Via. To choose more than one status hold down the CTRL key and choose the status and then choose the right arrow and choose apply and ok.



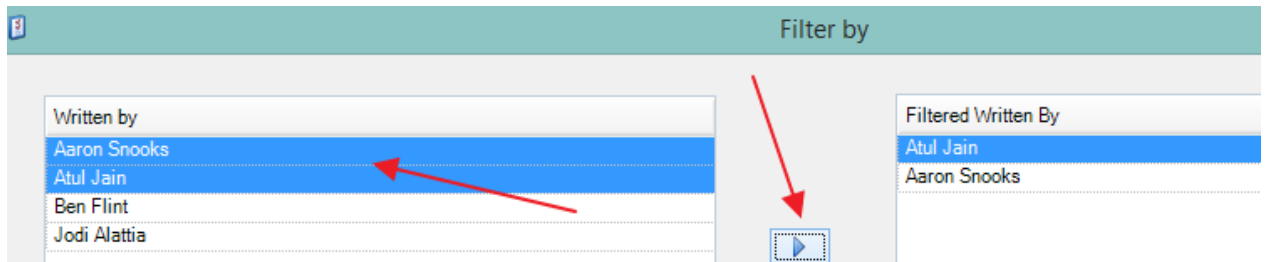
- To filter by all Ship Via's, choose the copy all arrow and then choose apply and ok



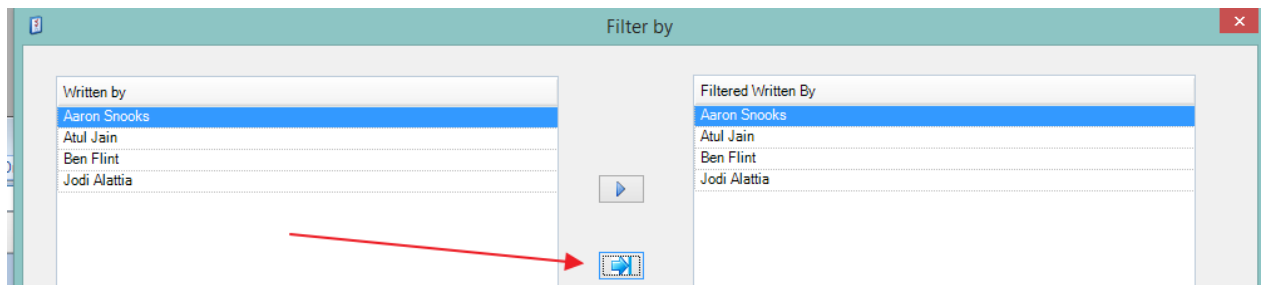
- Selecting the Clear button will clear the Ship Via filter



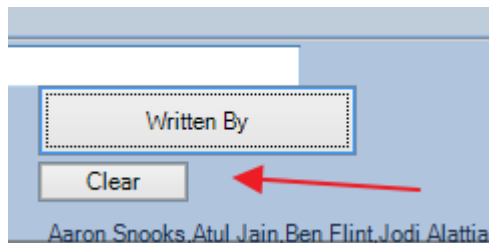
- Written by
 - To filter orders on who they were Written By, choose the person you want to filter. To choose more than one Written By hold down the CTRL key and choose the Written By and then choose the right arrow and choose apply and ok.



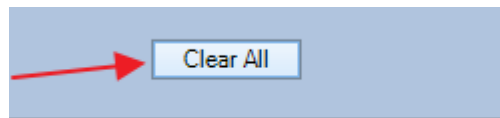
- To filter by all Written By's, choose the copy all arrow and then choose apply and ok



- Selecting the Clear button will clear the Written By filter



- The Clear All button clears all filters.



- Order Grid
 - 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.

Order #	Status	Ship To
109-2039	New Order	Cowpoke Country
109-2040	New Order	Cowpoke Country
109-2041	New Order	Cowpoke Country
110-2039	New Order	All Seasons Storage
110-2040	New Order	All Seasons Storage
110-2041	New Order	All Seasons Storage
111-5930	New Order	Alpine Self Storage
111-5932	New Order	Alpine Self Storage

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

ODT Viewer filters

Orders | Delivery And Orders + | Scheduler | Route Map | Geo History | Trip Status | Trip Reconcile | Messages

Ship To: [Dropdown] Order #: [Text] Invoice #: [Text]

Customer: [Text] Status Filter: [Text] Ship Via Filter: [Text]

[Clear] [Clear] [Clear]

Drag a column header here to group by that column

Order #	Status	Ship To	Address	City
109-2039	New Order	Cowpoke Country Daycare	1127 E Greenhurst Rd	Nampa
109-2040	New Order	Cowpoke Country Daycare	1127 E Greenhurst Rd	Nampa
109-2041	New Order	Cowpoke Country Daycare	1127 E Greenhurst Rd	Nampa

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

Order #	Status	Ship To
Address : 1063 East Lewis Lane (3 items)		
Address : 1081 East Lewis Lane (3 items)		
Address : 1127 E Greenhurst Rd (3 items)		
Address : 113 13th Avenue South (3 items)		
Address : 1220 5th Street North (4 items)		
Address : 12974 Iowa Avenue (3 items)		