

## Orders dashboard

### Overview

The order **Dashboard** gives you an instant overview of [all orders placed](#) through the portal.

A user could either have a view where they can only see the orders placed by themselves or have a more complete view where other user roles orders can be included. For more details on the role rights check the [User Roles and Permissions](#) documentation.

To access the dashboard, go to **Boarding > All orders**.

### Orders

Create order

Name ▼

Search

Date ▼
Status ▼
User ▼
Organizations ▼

✔ Editable
✘ Not Editable

Date Created <span style="font-size: 0.8em;">▼</span>	Organization <span style="font-size: 0.8em;">▼</span>	User <span style="font-size: 0.8em;">▼</span>	Status <span style="font-size: 0.8em;">▼</span>	Last edited <span style="font-size: 0.8em;">▼</span>
03-01-2024 15:41:37	Verifone	Susy Smith	Draft	03-01-2024 15:41:37
03-06-2024 14:09:36	Verifone	Susy Smith	Submitted	03-06-2024 14:09:49
02-19-2024 17:30:25	Parent	Susy Smith	In progress	02-19-2024 17:30:51
02-06-2024 21:30:01	Parent	Susy Smith	Approved	02-06-2024 21:30:54
01-14-2024 14:19:58	Parent	Susy Smith	Completed	01-14-2024 14:22:23

### Order filters

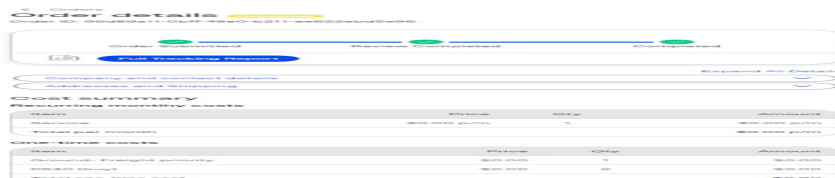
Created orders can be filtered by:

- **Date** - the orders can be filtered by *Created date* as to when the order was first created and *Updated date* as to when the order was last edited.
- **Status** - filtering the order list by their status(es).
- **User** - to show only the orders created by specific selected users.
- **Organizations** - the order list will display only the order created under a specific organization.
- **Portfolio** - If the user has access to multiple portfolios the list be displayed with options to filter the view.

### Order statuses

All orders follow a lifecycle progress from *Draft* to *Completed*. The order can be tracked from the Dashboard or through the *Order Details* page and displays the order life cycle from *Draft* to *Completed*.


The **Order Details** page is accessible if the user clicks on the order line.




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## Order details Completed

Order ID: 99d89a11-0bff-48e0-b211-ae622ebd5e96



Order Submitted
Review Completed
Completed


Full Tracking Report

Expand All Details

- Company and contact details
▼
- Addresses and Shipping
▼

### Cost summary

#### Recurring monthly costs

Item	Price	Qty	Amount
Chase Service	\$0.00 p/m	1	\$0.00 p/m
Total per month			\$0.00 p/m

#### One-time costs

Item	Price	Qty	Amount
Ground- Freight priority	\$0.00	1	\$0.00
P630 (buy)	\$0.00	2	\$0.00
Total one-time cost			\$0.00

## Draft status

An order is created as a **Draft** as soon as the first form is completed in the order page.

A draft order can be edited and completed through *Order details* and *Complete order*.

You can expand any order details section, to have the possibility to add new information or update specific details, by clicking on the green pencil button.


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## Order details Draft

Complete order

Order ID: c055beb2-c3ba-4632-96e7-1ee55ef767bd


Expand All Details

Company and contact details 


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**Company details**


Company name


Registration number 

**Contact details**


First name John 

Last Name Doe 


Email address test@test.com 

Phone number 123456789 

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Payment methods and devices 

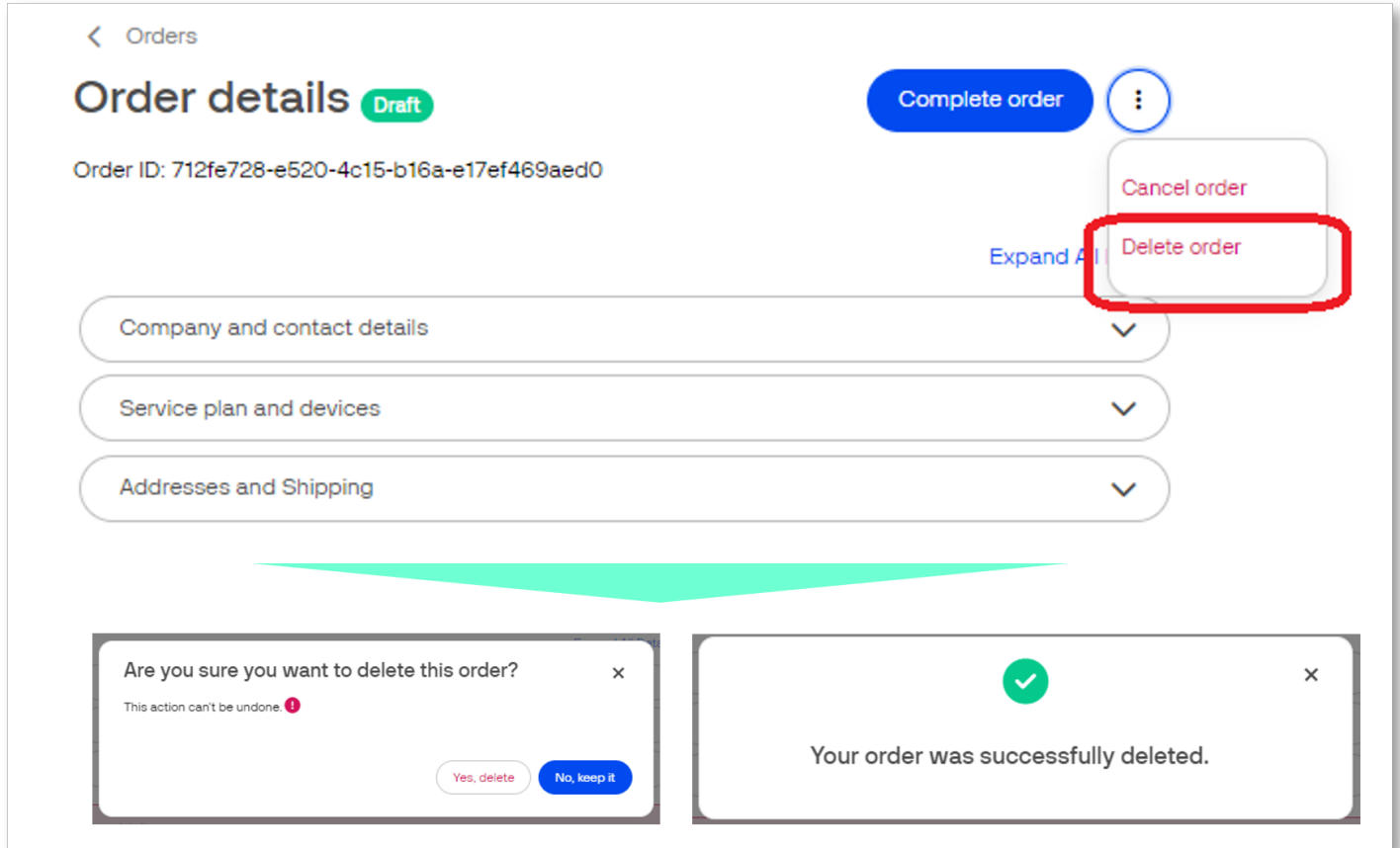
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Addresses and Shipping 

A draft order can also be deleted to keep your dashboard clean of redundant information by following these steps:

- Log into your Verifone Central account.
- Navigate to **Boarding** and click on **All orders**.
- Find the order you want to delete in the Dashboard and click to select it.

- At the order level, click on **View more details**.
- Click on **Delete order** to delete the draft order from the Dashboard.



Orders

## Order details Draft

Order ID: 712fe728-e520-4c15-b16a-e17ef469aed0

Complete order ⋮

Cancel order

Delete order

Expand All

Company and contact details

Service plan and devices

Addresses and Shipping

Are you sure you want to delete this order?

This action can't be undone.

Yes, delete No, keep it

Your order was successfully deleted.

### Submitted status

Once the order is submitted through the order page the order automatically updates to **Submitted**. Submitted is the first status of an order in progress and cannot be changed.

### In progress status

An order **In progress** or **Approved** is already confirmed by Verifone and awaiting order fulfillment.

### Booked

An order is approved and awaiting order fulfillment or completion.

### Completed status

An order **Completed** is already shipped by Verifone and is on its way, in transit or delivered to the requested shipping address or closed as a services order.