••• verifone

https://verifone.cloud/docs/verifone-central/verifone-central/boarding-services/boarding/orders-dashboard Updated: 26-Sep-2024

Orders dashboard

Overview

The order **Dashboard** gives you an instant overview of <u>all orders placed</u> 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 <u>User</u> Roles and Permissions documentation.

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

Orders

Name	~	Type a Name
Date V	Status 🗸	User V Organizations V

Date Created ✓	Organization 🗸	
03-01-2024 15:41:37	Verifone	
03-06-2024 14:09:36	Verifone	
02-19-2024 17:30:25	Parent	
02-06-2024 21:30:01	Parent	
01-14-2024 14:19:58	Parent	

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.

< Orders



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



Expand All Details

Company and contact details	~
Addresses and Shipping	~

Cost summary

Recurring montlhy costs

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

One-time costs

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

< Orders



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



Expand All Details

Company and contact details	×
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Total per month			\$0.00 p/m

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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.

< Orders



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



Expand All Details

Company and contact details		۸
Company details		
Company name	John Doe	
Registration number	C	
Contact details		
First name	John 🕑	
.ast Name	Doe 🖉	
Email address	test@test.com	
Phone number	123456789 🕑	
Payment methods and devices		V
Addresses and Shipping		V

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.

delete draft orders

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.