

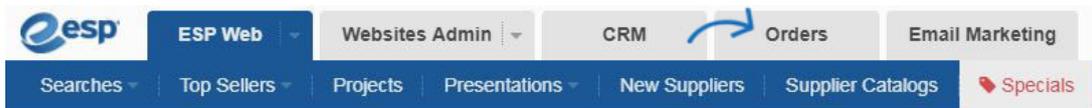


ESP Orders Homepage Overview

Jennifer M - 2019-03-06 - Getting Started

The ESP Orders homepage is where you can create new sales documentation, as well as view and search for existing sales documents .

To access ESP Orders, click on the Orders tab within ESP.



On the ESP Orders homepage, click on the heading to navigate to the type of sales documentation you would like to view. There are six tabs, including the [My Dashboard](#), where you can view a general overview of your orders. Additional tabs will show Quotes, Orders, Invoices, Samples Requests, and [purchase order history](#).

Orders



You can also [begin a new order, invoice, quote, or sample request](#) using the buttons available on the ESP Orders homepage.



There are many ways to locate past orders. You can click on a column header to sort the column in an ascending or descending order. There is also a search bar where you can enter an order number or customer name.

Click on the order number to [open the order in an editable state](#). You can add, edit, or remove any information needed from the order. For example, if you received an order through an ESP Website or Company Store, some information will be automatically filled in, but you will want to review and possibly adjust some of the order details.

The existing orders which are listed contain general information about the order:

- **QuickBooks/SmartBooks icon:** This icon indicates that the order has been sent to QuickBooks/SmartBooks. You must have a [QuickBooks or SmartBooks account integrated](#) to push orders to see the icon.
- **Order #:** The number of the order.
- **Customer:** The name of the customer for whom the order has been placed.
- **Date:** The original creation date for the order.
- **In-Hands Date:** The specified date the customer needed the order in their hands.
- **Total:** The total order amount.
- **Status:** The current status of the order.
- **Arrow:** The arrow opens a dropdown which enables you to Send, Preview, or Download. Also in the dropdown is the Request Payment Option.

<input type="checkbox"/>	Order #	Customer	Date	In-Hands Date	Total	Status	
<input type="checkbox"/>	22851	ESP Company	11/30/18	3/8/19	\$44,661.40	Open	▼
<input type="checkbox"/>	12345	ESP Company	1/22/19	2/28/19	\$390.00	Open	▼

Note: You must have a [QuickBooks or SmartBooks account integrated](#) to push orders.

Hover on the order number to display the new order quick view. Click on the order number to open the order in an editable state.

The screenshot shows a dashboard with tabs for Dashboard, Quotes, Orders, Invoices, Sample Requests, and Purchase Order History. A search bar is present. On the left, a list of orders is shown with order numbers 22851, 12345 (circled), 23316, 23315, 23318, and 23366. A modal window is open for order 12345, displaying the following information:

- 12345** ORDER #
- 1/22/2019** ORDER DATE
- 2/28/2019** IN-HANDS DATE
- Jennifer Shinberg** SALES PERSON
- ESP Company** CUSTOMER
- ESP Company** BILLING
- ESP Company** SHIPPING
- ESP Company** ACKNOWLEDGEMENT
- Innovation Line**
- Basketball Lu...** (with a basketball icon)
- PRODUCT#: WSBBT10

A "View Order" button is located in the top right corner of the modal. At the bottom right of the modal, it says "1 Linked Transaction".

You can also use the [Sort and Filter section](#) on the right to narrow the amount of orders displayed using the available options.

If you need to change the status of an order, for example to close or cancel it, use the checkbox to select the order listing. The Status dropdown will enable you to choose the status for which you would like to apply to the selected order(s).

Dashboard Quotes Orders **Invoices** Sample Requests Purchase Order History

Q Search by product, supplier, etc. Status ▾ Export ▾

Order # ▾ Customer ▾ In-Hands Date ▾ Total ▾ Status ▾

ASI1000195 ABC Company 3/6/19 \$1,788.94 Open

Open
Closed

A notification will display, ensuring you would like to change the status for the order(s) selected. Click Ok.

Are you sure you would like to make these records Closed?

Cancel Ok

The status will be updated.

<input type="checkbox"/>	Order # ▾	Customer ▾	Date ▾	In-Hands Date ▾	Total ▾	Status ▾
<input checked="" type="checkbox"/>	ASI1000195	ABC Company	3/6/19		\$1,788.94	Closed