Using the Sort and Filter Options in ESP Orders

Wendy Dujmovic - 2019-01-25 - Manage Orders

Orders are sorted automatically by the Date, starting with the most recent. You are able to use the arrows next to each header name to sort in an ascending descending order or use the Search box to enter a customer name or order number.

Filters enable you to view specific orders based on your selections. The available filter options are status, date, websites (if applicable), sales rep (for administrators), and tags.

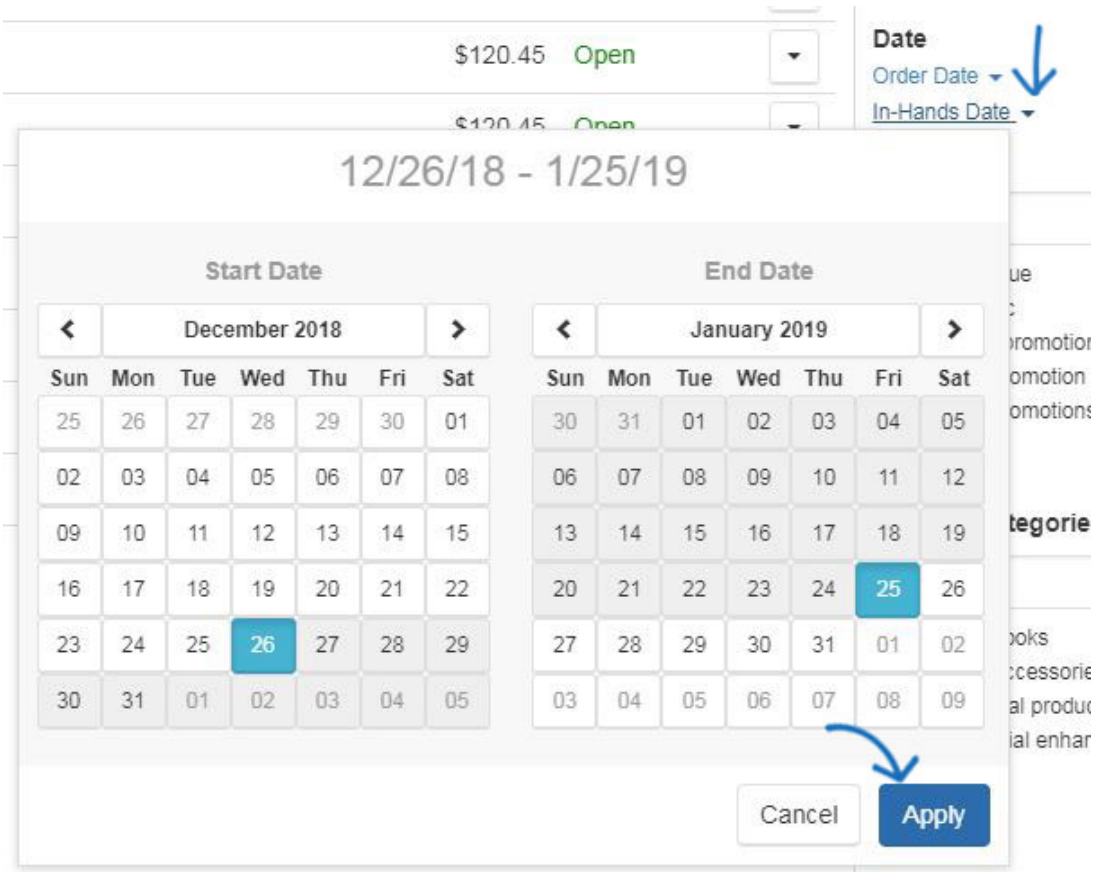
To reset the filters, click on the Clear Filters button. This will display all orders.

Status

Use the checkbox to select Open or Closed. Open orders are those which have not yet been completed, whereas orders which have been completed will have a status of Closed. In the image below, there is an additional status of "Locked". This is a custom status created by the company administrator. Any available statuses will be available in the Status section of the filter options.

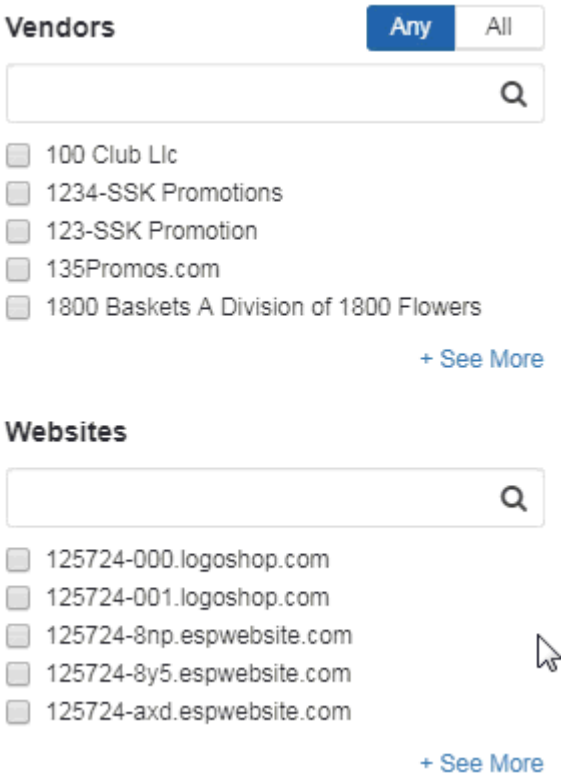
Date

In the Date section, use the arrow next to Order Date or In-Hands date to open the calendars. Then, select a Start Date and an End Date. Click on Apply when you are ready to filter.



Customers, Product Categories, and Vendors

You are able to filter for specific customers, product categories, or vendor with whom you have placed an order. The search box is enabled for search leading text, meaning that as you type, only matching results will appear below. The "See More +" link will display all available options and generate a scroll bar where necessary.



Websites

If you are an ESP Websites subscriber, orders that are created via an ESP Website or Company Store will be added to your Order listings. Click on a domain name under websites to view all orders placed through the ESP Website or Company Store you selected. The search box is enabled for search leading text, meaning that as you type, only matching results will appear below. The "See More +" link will display all available options and generate a scroll bar where necessary.

Sales Rep

Administrators to ESP Orders will be able to click on a sales representative's name. To view orders from multiple representations, continue to click on names. The search box is enabled for search leading text, meaning that as you type, only matching results will appear below. The "See More +" link will display all available options and generate a scroll bar where necessary.

- The **"All"** option will display orders which include all selected sales representatives.
- The **"Any"** option will display the orders associated with any of the selected sales representatives.

Tags

Click on a tag to view orders containing those tags. To view orders from multiple tags, continue to click on terms in this section. The "See More +" link will display all available options and generate a scroll bar where necessary.

- The **"All"** option will display orders which include all selected tags.
- The **"Any"** option will display the orders associated with any of the selected tags.