Order Tracking / Order History

Need customised fields and functions?

This guide describes the extensive out-of-the-box options available for the Order Tracking function. But perhaps your customer orders capture additional information that you want to be searchable or displayed in Order History, e.g., Job Number, Procurement Reference, or Actual Delivery Date? For implementation of custom fields and options, please contact Commerce Vision.

On this page:

Overview

Online order tracking allows your customers to look up an invoice or their entire history of submitted orders. Using the standard filter, a search can be limited to return only orders that are:

- completed
- rejected
- returns
- awaiting approval, or
- outstanding.

For B2B customers where one account can have more than one user, and/or one user can be linked to multiple accounts, Order History can be set to allow the user to view:

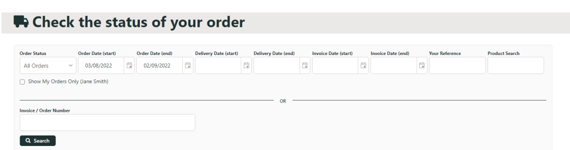
- only the orders they submitted, OR all orders on the Customer account
- only the orders for the Customer account they are currently in, OR all orders for all linked Customer accounts.

Set Order Tracking options

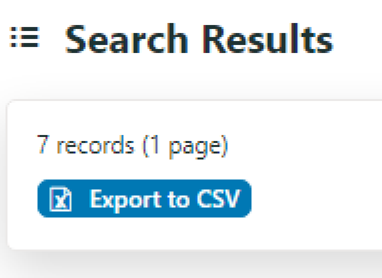
Administrators can open the Track Order Widget to configure options and the display of:

- search fields in the Search order tool
- search results displayed (via columns)
- order details page

Search tool

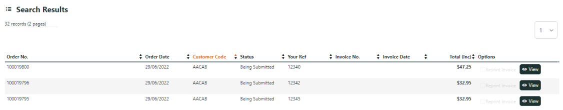


- Display list of orders (below Search panel) automatically on page load or wait for user's search
- Allow search by Account Code?
- Consolidate search options?
- Show only orders for current customer account or all customers linked to user
- Select an order status to default?
- Allow download of found orders to CSV file. *For versions 4.31+*

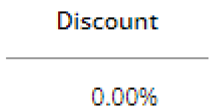


Search Results columns

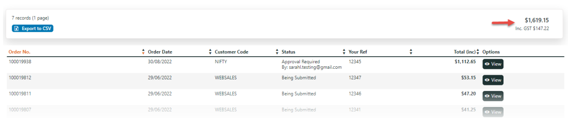
Customise what data are shown in search results when each order is listed.



- Discount (displays ERP-initiated discounts only)
  - Show blank when discount rate is 0%? If off, 0% discount displays as:

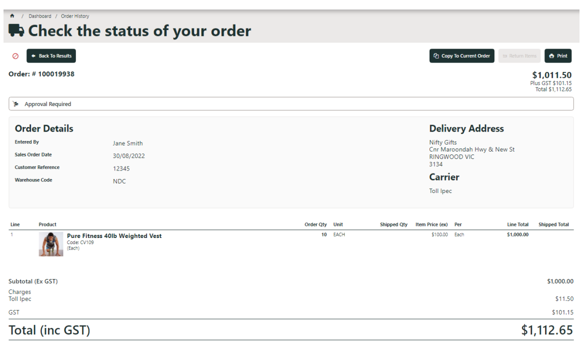


- Backordered info
- Actual and/or preferred delivery dates
- Approver details for orders awaiting approval
- User who submitted order
- Customer name or customer code
- Invoice amount display options (with further options for tax amounts)
- Total for all orders found (*version 4.38+ only*)



Order detail page

Customise details displayed when an order is viewed.



- Warehouse/location description or code
- Consolidate note lines
- Invoice approval information
- Preferred delivery date
- Invoice Details
- APN or Product Code
- Allow hyperlink to product details page
- Show order shipped total summary?
- View Unit of Measure (UOM) difference text?
  - Show extended UOM difference text?
- Itemise charges/extra fees
- Allow invoice download? (Document Downloads need to be set up to use this feature.)

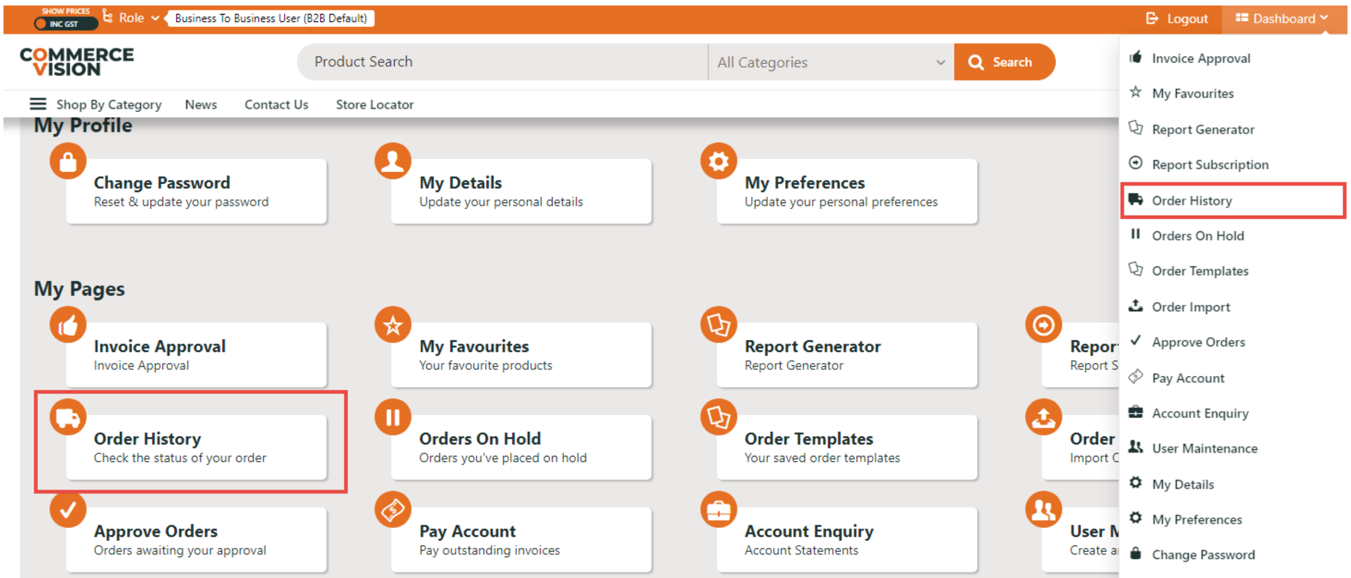
FAQ

A: The Order History is a record of ALL orders and will always include completed orders. Pay Accounts is only for outstanding invoices.

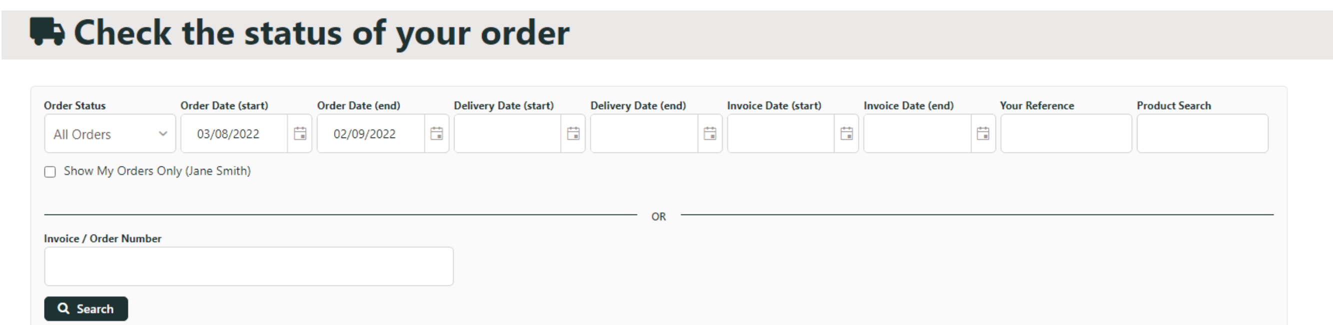
Customer Experience

NOTE - Order tracking is available to a user only if enabled at the user's Role level. The functionality is generally enabled for B2B customers but can be made available to any user group.

(1) Your customer accesses Order Tracking on the Dashboard menu when logged in. The menu item is usually called 'Track Orders' or 'Order History' but can be different depending on what your business wants to label it.



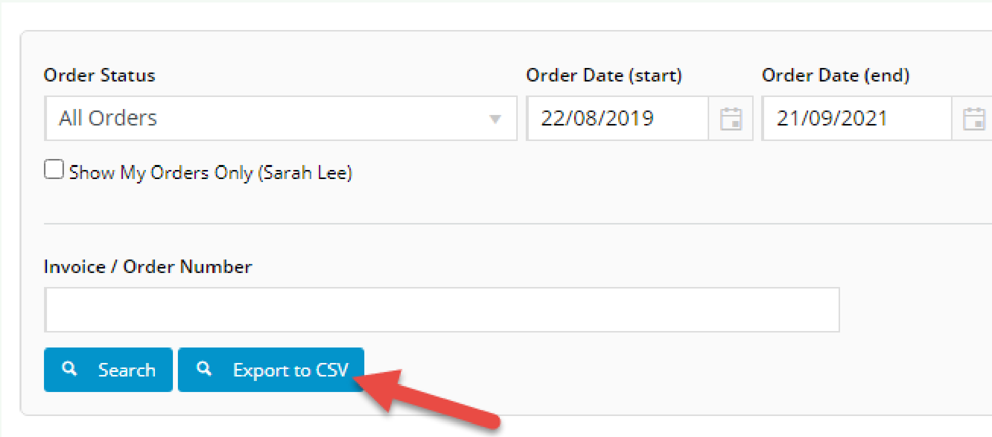
(2) The user can search for a specific order by entering the invoice number or enter a search criteria to find one or more matching orders.



(3) All found orders are listed, each with basic details such as current order status, order date, and order total. (Display options are edited in the Track Order Widget.)

Add Export to CSV

If you want to allow your customers to download search results to a CSV file, in the Track Order Widget, enable the **Show Export to CSV** toggle. .



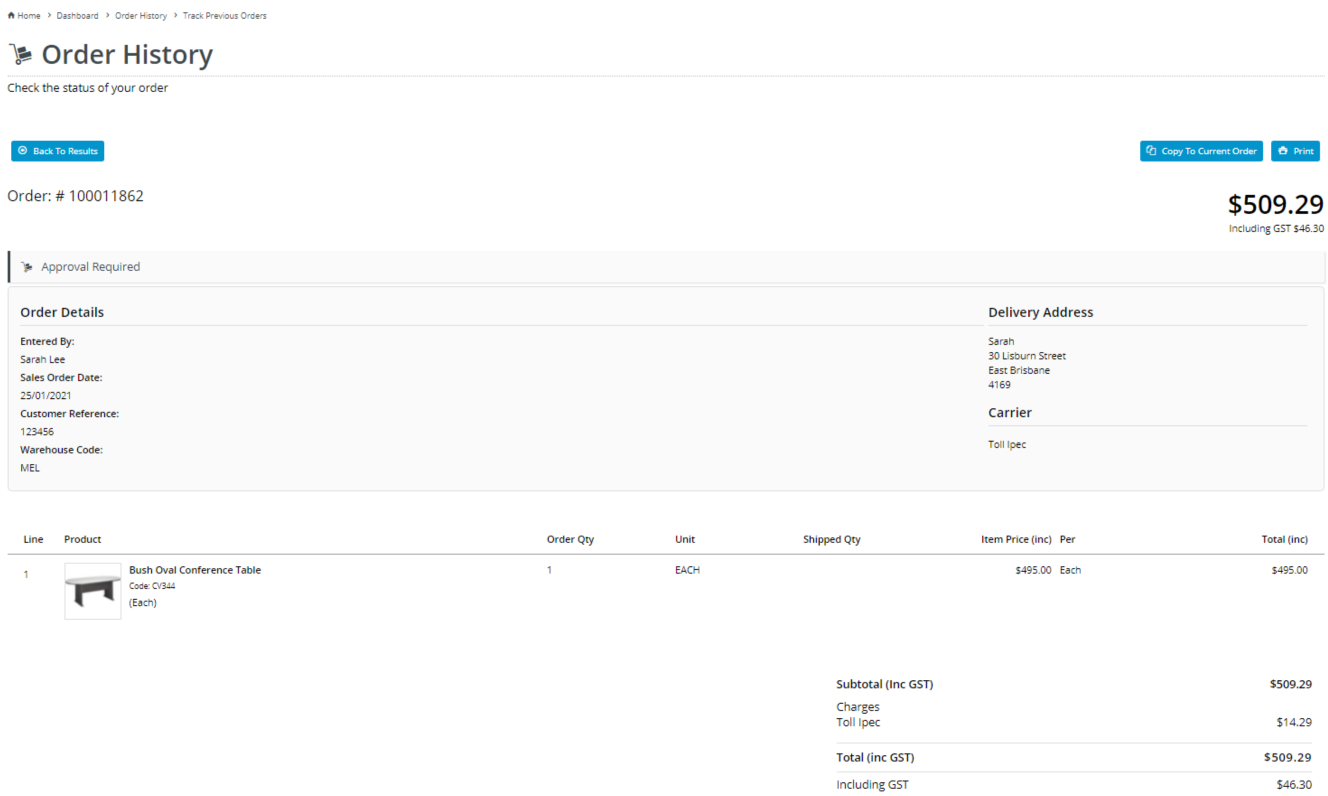
The user can click **View** to see an order's details. If the order has been completed, the **Invoice Reprint** button will be available.

56 records. (12 pages) [1][2][3][4][5][6]7[8][9][10][...]

OrderNo	OrderDate ▲	Your Ref	Status	Total	
337109	07-May-2014	5265	In Progress	$1507.01	View
337108	07-May-2014	TEST	Order Received	$2556.51	View
TBA	08-May-2014		Placed on Hold	$6406.69	View
337123	12-May-2014		Cancelled	$6796.90	View
337122	12-May-2014	DGHDGFH	In Progress	$74.42	View

56 records. (12 pages) [1][2][3][4][5][6]7[8][9][10][...]

In the order details page, the user can view the order, copy items to their cart and print the order.

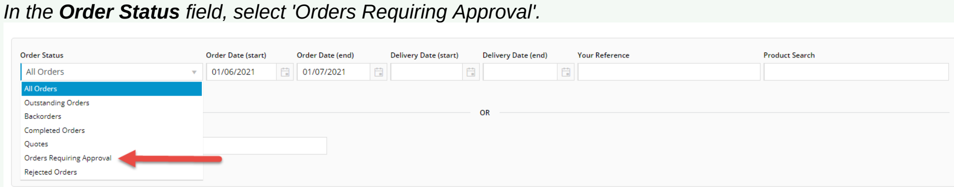


For Customer accounts with Approvals enabled

If an Advanced Order Approver by User and Account option with re-assign approver has been set up for a Customer account, the user will be able to re-assign to another available approver in Order Tracking. The log of actions relating to the approval, e.g., approver changed, approval time stamp, are also displayed.

Orders pending approval can be searched for in Order Tracking.

1. *In the **Order Status** field, select 'Orders Requiring Approval'.*



2. *Enter any start/end dates to limit the search.*
3. *Click **Search**.*
4. *Click **View** for any found 'pending order'.*
5. *In the **Approval Status** panel, you can re-assign the approver if there is another valid approver.*

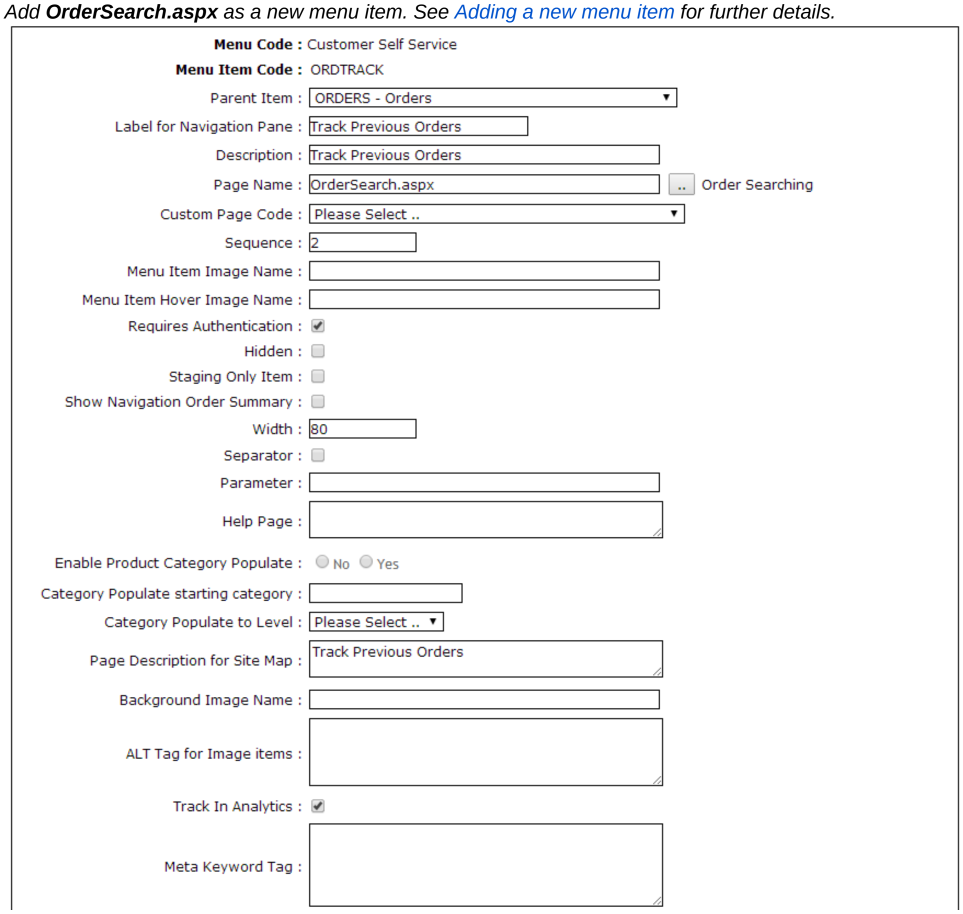
Step-by-step guide

Enable Order Tracking

NOTE - Order Tracking is usually already added and enabled by Commerce Vision for your site. However, if the page has been removed and you want to re-add, here is how to do it.

To enable Order Tracking:

1. *Login to your website as an Administrator.*
2. *Navigate to **Content Menu Editor** (/zMenus.aspx).*
3. *Select the required **Menu Code**.*
4. *Click **Parent Items**.*
5. *Select the required **Menu Item Code**.*
6. *Click **Menu Items**.*
7. *Add **OrderSearch.aspx** as a new menu item. See Adding a new menu item for further details.*



8. *Enter the label name and details for the menu item as well as where it will be located in the User's navigation menu. The label usually used is 'Order Tracking' or 'Order History'.*

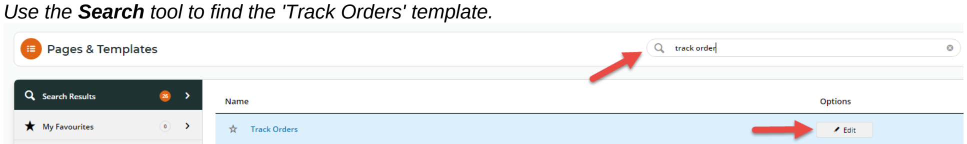
Update Order Tracking Settings

Options and settings for the Order Tracking page are configured in the Track Order Widget. Enable and disable settings and functions, edit texts for labels, buttons and fields for:

- Search order tool
- search results display (via columns)
- order details page

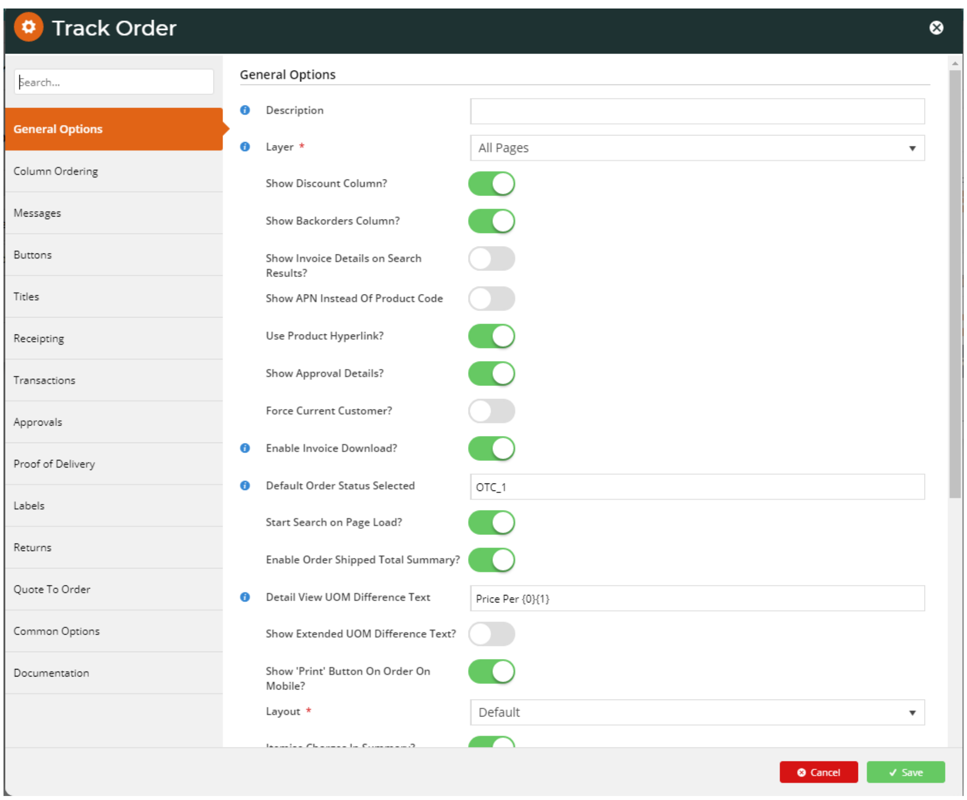
To edit the Track Order Widget:

1. *In the CMS, go to **Content Pages & Templates**.*
2. *Use the **Search** tool to find the 'Track Orders' template.*



3. *Click **Edit**.*
4. *Find the **Track Order Widget** and click **Edit**.*

5. *Edit the settings as required. See: [Track Order Widget](). (**NOTE -** Some options have minimum version requirements.)*



Additional Information

With order tracking enabled, it's possible to customise the order status descriptions that users see. Refer to [How to customise Order Status descriptions]() for further information.Order status descriptions and search filter options can be customised.

Minimum Version Requirements	**.**.**
Prerequisites	**

Self Configurable	Yes
Business Function	Orders
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Preferred Delivery Date
- How Order Integration Works
- Standing Orders Settings
- Order Templates
- Online Returns
- Standing Orders Overview
- Enforce Pack Quantities Globally

Related widgets

- Track Order Widget
- Email Order Track Details Widget