How to customize your "My Orders" table

Upon logging into the Dashboard site, the first thing you will see is the home screen. On the Navigation Toolbar on the left click on the "My Orders' icon. This will take you to the "My Orders" table. The Orders table is a powerful tool to help you review, sort, and organize all your orders.

You have the ability to customize your "My Orders" table so it best suits your needs.

A. The first step in setting up your "My orders" table is to select the columns you would like to see.
   a. To add or remove columns, **click on the** gear box at the top center of the window to the right of the "Generate Report" drop down.
   b. In the pop-up box, hover over **Columns** to display the available columns
   c. Check or uncheck the columns you want to display or hide
   d. Some of the main columns you may want to use are:
      i. **Order ID, PO, Status, ETA, picked up, delivered, service level, pickup address, delivery address, due date, number of pieces and price**
   e. The "My Orders" table defaults to displaying 20 items per page. You can select the number of items you would like displayed from the items per page drop down at the bottom of the screen
   f. You can also toggle back and forth between pages using the navigational arrows

B. Once you have selected your columns, the next step is to organize your columns
   a. To set your columns in the order you prefer simply click and hold the column header and drag it to the column location you would like to move it to.
   b. You will see two little chevrons that indicate the new location for your column, release the column in the location you would like it to be in

Once your "My Orders" table is set you can sort and apply filters to your columns as needed.

C. **To Sort a column in ascending or descending order, s**imply click on any column header to sort it by ascending or descending values, dates, or letters. The arrow next to the column header name will indicate the direction of sortation

D. **To Apply filters to one or many columns**
   a. Click on the funnel symbol next to a column name to launch its associated filter. These filters are "smart" in that they will differ according to the type of data associated with the column.
      i. For instance, if you click on the Status funnel you will be offered a choice of statuses to pick from
         1. If you select "Delivered" it will only display orders that have been delivered
   b. However, if you click on the funnel for a column containing dates, you will be presented with filtering options. Select the filtering options that best meet your needs
   c. Lastly, some columns will also include "and" _ "or" search functions. Select the filtering options that best meet your needs
   d. Once you have applied your first filter, a ***Clear All Filters*** button will appear near the top of the page:

         i. You can clear all filters by clicking the "***Clear All Filters"*** button, or you can clear a filter on a specific column by clicking on the funnel symbol for the column and click clear

e. Once you have set up your table, the Dashboard automatically remembers your preferences on the computer and browser you are currently using, so you do not have to worry about setting them up each time.

Now that your My Orders table is set-up, you're ready to start placing orders today!