How To Easily View and Create Orders for Multiple Accounts

Previously, you could only view Orders for one account at a time if you had multiple accounts. Now you are now able to view all your Orders from your Accounts on the Order list at the same time and create new Orders or from Order Templates across your Accounts regardless of the Sub-account that was used at login.

Upon logging into the Dashboard site, the first thing you will see is the home screen.

A. To view, edit or cancel an order click on the "My Orders" icon on the "Navigation Toolbar" on the left-hand side of your screen and this will take you to the "My Orders" table.
B. On the "My Orders" table, you will see a new "Account" Column. This column will show you the accounts description.
   o To view an order from a specific account, click on the order number link to open it. That order has now automatically logged you into that account.
      ▪ You can now place an order as this account using the new order button.
   o You can navigate back to the orders page by clicking on the blue "My Orders" button on the navigation toolbar on the left-hand side of your screen. But remember you are still logged in to the account of the order you had just looked at.
   o If you choose a different account order, once you click into that order you are now logged in as that account and create a new order using the new order button.

C. The easiest way to create a "New order or New Order from Template" for any account you have is by clicking "New Order" button with the plus icon on the "Support Menu" tool bar at the top right of the screen. A dropdown offers will appear.
   o The first 15 Sub-accounts are shown in this list.
   o The list is divided onto 2 sections: "Create Order" and "Create Order from Template."
      ▪ To Create a new Order:
         ❖ Click on the specific account below the heading Create Order for and you will automatically be logged in to the specific account and a new Order will be displayed.
      ▪ Create an Order from Template:
         ❖ Click on the specific account below heading Create Order from Template for and you automatically be logged in to the Sub-account and the Create Order will be displayed with a popup showing the list of Templates.
         ❖ Click on the Template name or perform a search for a template and then Order screen will refresh to show the Order.

D. If your account has more than 15 accounts associated with it, only the first 15 will be displayed.
   o To create an order from an order not displayed, click on the "Profile Icon" button on the "Support Menu" tool bar at the top right of the screen. A dropdown will appear.
   o Click on More Accounts... located below the list of accounts and it will bring you back to the login with the list of all accounts where you can select the account for the new Order.

You now have access to all your accounts in one place. DASHBOARD provides you total control over your pick-ups and deliveries. You can place an order and move on to your task quickly and worry-free. Place an order today!