

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](#).

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

Check the status of your order

- 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

7 records (1 page)

Export to CSV

Search Results columns

On this page:

- Overview
 - Set Order Tracking options
- Customer Experience
- Step-by-step guide
 - Enable Order Tracking
 - Update Order Tracking Settings
- Additional Information
- Related help
 - Related widgets

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

Search Results						
Order No.	Order Date	Customer Code	Status	New Ref	Invoice No.	Invoice Date
10019800	29/06/2022	AACAB	Being Submitted	12341		\$47.20
10019812	29/06/2022	AACAB	Being Submitted	12342		\$32.80
10019813	29/06/2022	AACAB	Being Submitted	12343		\$32.80

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

Discount

0.00%

- 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 No.	Order Date	Customer Code	Status	New Ref	Total Inv	Options
10019818	30/06/2022	NPFY	Approval Required APN#100019818@PMSales	12345	\$1,112.60	
10019812	29/06/2022	MERMALES	Being Submitted	12347	\$33.80	
10019811	29/06/2022	MERMALES	Being Submitted	12348	\$47.20	
10019817	29/06/2022	MERMALES	Being Submitted	12349	\$44.20	

Order detail page

Customise details displayed when an order is viewed.

Check the status of your order

Order # 100019938

Approval Required

Order Details

Entered By: Jane Smith
Sales Order Date: 30/06/2022
Customer Reference: 12345
Warehouse Code: NDC

Delivery Address

Nifty Gifts
31 Macarthur Hwy & New St
3134
VIC
Carrier
TNT (pac)

Line	Product	Order Qty	Unit	Shipped Qty	Items Price (ex)	Per	Line Total	Shipped Total
1	Pure Fitness 40lb Weighted Vest 	1	EACH	0	\$1,000.00		\$1,000.00	

Subtotal (Ex GST)
Charges
GST
Total (inc GST)

\$1,000.00
\$11.50
\$101.15
\$1,112.65

- 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/extras fees
- Allow invoice download? (Document Downloads need to be set up to use this feature.)



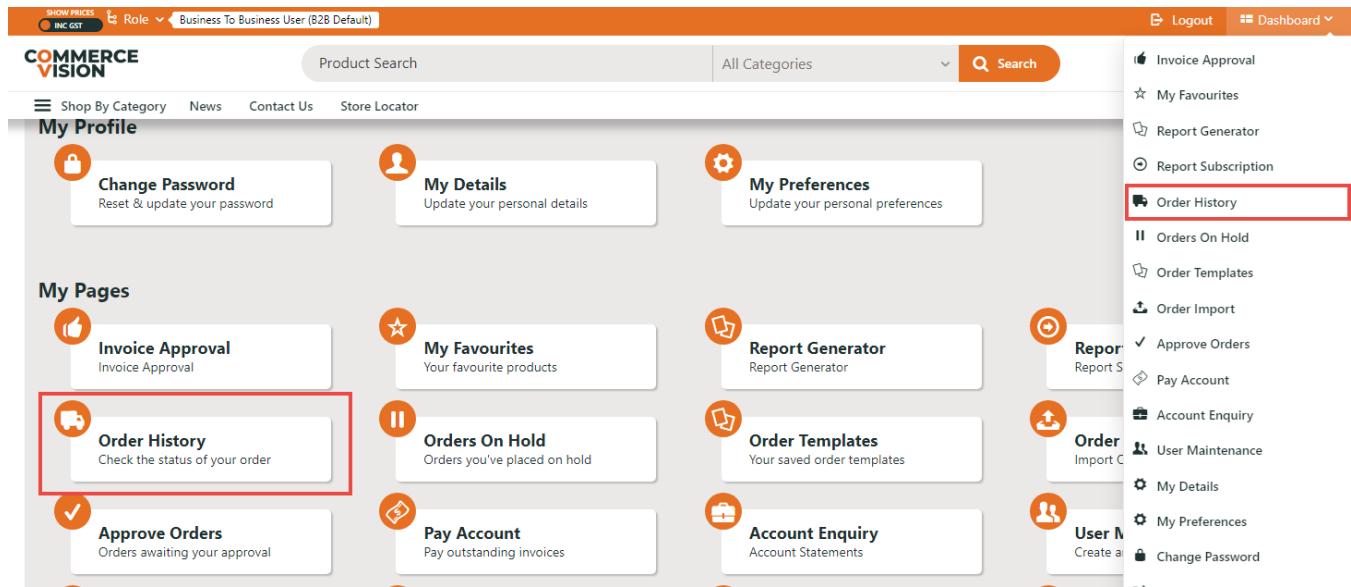
FAQ

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

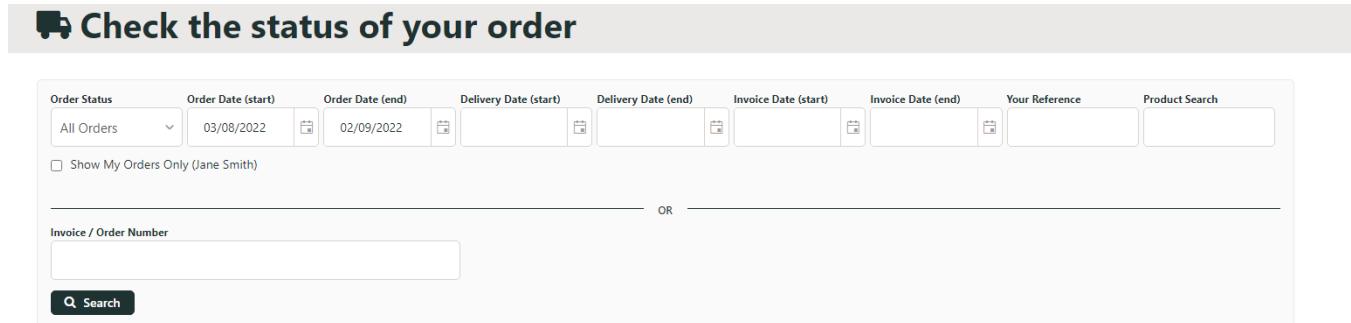
NOTE - Order tracking is available to a user only if enabled at the user's Role level. The functionality is generally enabled for B2B customers but can be made available to any user group.

(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.



The screenshot shows the Commerce Vision dashboard. At the top, there are navigation links for 'SHOW PRICES', 'INC GST', 'Role' (set to 'Business To Business User (B2B Default)'), 'Logout', and 'Dashboard'. Below the header, there are sections for 'Product Search', 'All Categories', and a search bar. On the left, there's a sidebar with 'My Profile' options like 'Change Password', 'My Details', 'My Preferences', and 'Order History' (which is highlighted with a red box). The main area has a section titled 'My Pages' with various links: 'Invoice Approval', 'Order History' (highlighted with a red box), 'Approve Orders', 'My Favourites', 'Orders On Hold', 'Pay Account', 'Report Generator', 'Order Templates', 'Account Enquiry', and 'User Maintenance'. On the right, there's a vertical list of other menu items: 'Invoice Approval', 'My Favourites', 'Report Generator', 'Report Subscription', 'Order History' (highlighted with a red box), 'Orders On Hold', 'Order Templates', 'Order Import', 'Approve Orders', 'Pay Account', 'Account Enquiry', 'User Maintenance', 'My Details', 'My Preferences', and 'Change Password'.

(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.



The screenshot shows a search interface titled 'Check the status of your order'. It features a grid of input fields for filtering orders based on various criteria: 'Order Status' (dropdown, 'All Orders'), 'Order Date (start)' (date picker, '03/08/2022'), 'Order Date (end)' (date picker, '02/09/2022'), 'Delivery Date (start)' (date picker), 'Delivery Date (end)' (date picker), 'Invoice Date (start)' (date picker), 'Invoice Date (end)' (date picker), 'Your Reference' (text input), and 'Product Search' (text input). Below these fields is a checkbox 'Show My Orders Only (Jane Smith)'. A horizontal line with the word 'OR' separates this from another search field labeled 'Invoice / Order Number' (text input) and a 'Search' button.

(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. .

Order Status	Order Date (start)	Order Date (end)
All Orders	22/08/2019	21/09/2021

Show My Orders Only (Sarah Lee)

Invoice / Order Number

Search Export to CSV



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	DGHDFH	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.

Order History

Check the status of your order

[Back To Results](#)

[Copy To Current Order](#)

[Print](#)

Order: # 100011862

\$509.29

Including GST \$46.30

 Approval Required

Order Details		Delivery Address	
Entered By:	Sarah Lee	Sarah	30 Lisburn Street
Sales Order Date:	25/01/2021	East Brisbane	4169
Customer Reference:	123456	Carrier	Toll Ipec
Warehouse Code:	MEL		

Line	Product	Order Qty	Unit	Shipped Qty	Item Price (inc)	Per	Total (inc)
1	 Bush Oval Conference Table Code: CV244 (Each)	1	EACH		\$495.00	Each	\$495.00

Subtotal (Inc GST)	\$509.29
Charges	
Toll Ipec	\$14.29
Total (inc GST)	\$509.29
Including GST	\$46.30

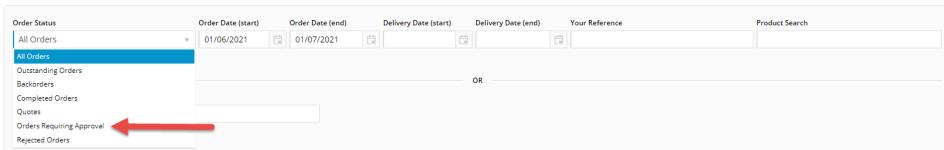


For Customer accounts with Approvals enabled

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.

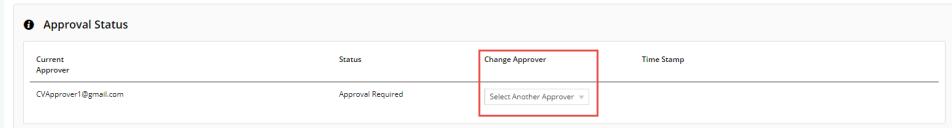
Orders pending approval can be searched for in Order Tracking.

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



The screenshot shows a dropdown menu for 'Order Status' with several options: All Orders, Outstanding Orders, Backorders, Completed Orders, Quotes, Orders Requiring Approval (which is highlighted with a red arrow), and Rejected Orders.

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.



The screenshot shows a table with columns for 'Current Approver' (CVApprover1@gmail.com), 'Status' (Approval Required), 'Change Approver' (button with a dropdown menu labeled 'Select Another Approver'), and 'Time Stamp'.

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.

The screenshot shows the 'Content Menu Editor' interface with the following settings for a new menu item:

- Menu Code:** Customer Self Service
- Menu Item Code:** ORDTRACK
- Parent Item:** ORDERS - Orders
- Label for Navigation Pane:** Track Previous Orders
- Description:** Track Previous Orders
- Page Name:** OrderSearch.aspx
- Custom Page Code:** Please Select ..
- Sequence:** 2
- Menu Item Image Name:** (empty)
- Menu Item Hover Image Name:** (empty)
- Requires Authentication:**
- Hidden:**
- Staging Only Item:**
- Show Navigation Order Summary:**
 - Width:** 80
 - Separator:**
 - Parameter:** (empty)
 - Help Page:** (empty)
- Enable Product Category Populate:** No Yes
- Category Populate starting category:** (empty)
- Category Populate to Level:** Please Select ..
- Page Description for Site Map:** Track Previous Orders
- Background Image Name:** (empty)
- ALT Tag for Image items:** (empty)
- Track In Analytics:**
- Meta Keyword Tag:** (empty)

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.

A screenshot of the CMS 'Pages & Templates' search results. A red arrow points to the search bar at the top containing the text 'track order'. Another red arrow points to the 'Edit' button for the 'Track Orders' template, located in the top right corner of its preview card.

3. Click **Edit**.

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

A screenshot of the 'Edit - Track Orders Template' page. Under the 'Widget Layout' section, there is a list of widgets in the 'Zone: Content': 'Page Title' (checked) and 'Track Order' (checked). Red arrows point to the 'Edit' buttons for both the 'Page Title' and 'Track Order' widgets.

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

A screenshot of the 'Track Order' configuration dialog. The left sidebar shows a list of categories: General Options, Column Ordering, Messages, Buttons, Titles, Receipting, Transactions, Approvals, Proof of Delivery, Labels, Returns, Quote To Order, Common Options, Documentation, and Layout. The 'General Options' tab is selected and highlighted in orange. The main area contains various configuration options with toggle switches and dropdown menus. A red arrow points to the 'General Options' tab in the sidebar. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

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](#)