



# Order Summary Page Overview

The Order Summary Page can be filtered by vendors, Order Status and Date Range in which the order was created in RevCascades Portal. These filters will efficiently assist with tracking aging orders by vendor or reference orders within a specific date range across the board of all vendors.

## 1. Getting to Know your Orders Screen

### a. Order ID #

The Order ID is a RevCascade internal Reference Number.

Brand	Status	Received	Search order numbers...		Export	Create Order			
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

### b. Order Age Status

The Age column reflects the age of the order. If the order surpasses a certain amount of days the value will appear in **red text** symbolizing the order is aging and should be addressed with the vendor as to why the order has not been closed. (Typically this occurs when vendors have completed processing with shipment and invoice information but forget to click the close order button within the individual order page)

Brand	Status	Received	Search order numbers...		Export	Create Order			
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

### c. Order Status

The “Open” and “In Progress” status types are orders that have been Acknowledged by the vendor and either already contain shipment information or are to be anticipated to ship soon. The order status is displayed on the left of the screen, right beneath the order search bar.

Brand	Status	Received	Search order numbers...		Export	Create Order			
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
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- i. New - The order has been created within RevCascade’s Console and has not been “Acknowledged” by the vendor.



- ii. Open - Order has been “Acknowledged” by the vendor. If the order contains 1 ordered item, the order could potentially have a shipment created against it.
- iii. In Progress - Order has already been “Acknowledged” by the vendor and has shipments created. This status type typically appears orders that contain 2 or more items ordered
- iv. Closed - Order has been closed out within RevCascade’s Console. Shipment and Invoice (if required) information should be available within your internal system. This information can also be viewed within the Console under the Shipments and Invoices Section of the Order Summary Screen (View Shipment and Invoice Overview Section for further Information)
- v. Cancelled - Order has been cancelled within RevCascade’s Console. Cancellation types vary (View Cancels Overview Section for further Information)

#### d. Vendor Name Column

The Brand column will contain the vendor’s Name to identify whom the order(s) belongs to

Brand	Status	Received	Search order numbers..	Export	Create Order				
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

#### e. Purchase Order Number Column

The Purchase Order column contains the PO # pertaining to the order. This number should be referenced on all inquiries with the RevCascade Support Team for order assistance

Brand	Status	Received	Search order numbers..	Export	Create Order				
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

#### f. Received Column

The Received column displays the date in which the order was created within RevCascade’s Console

Brand	Status	Received	Search order numbers..	Export	Create Order				
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

#### g. # Shipped Column

The # Shipped column reflects the total units shipped versus total units ordered. The image example below shows for the first order line 0 of 2. This means that the order has 2 units ordered and no shipments have been created. If the value was 2 of 2 this would mean that a



shipment has been created and the total 2 units are shipping. The ship value can also reflect partial or overages

Brand	Status	Received	Search order numbers...			Export	Create Order		
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

### h. Ship Via & Shipping Method Columns

The Ships Via and Shipping Method columns reflect the shipping method that was provided on the order. If the order requires to reflect a different carrier and/or ship method this can be communicated to the RevCascade Support Team to assist with updating. The vendor can also select a different value when creating the shipment information in the portal, whether the vendor is using the console to generate shipping labels or register their tracking information.

Brand	Status	Received	Search order numbers...			Export	Create Order		
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

### i. Invoice Column

The Invoice column reflects a “No” or “Yes” value. If the value is “No” and you require an invoice for each order, the vendor will need to create an invoice in order to close out the order. If the value reflects “Yes” and the order remains on your Open Order Summary screen, this potentially means that there is an issue with the invoice and the vendor should reach out to the RevCascade Support Team for further assistance.

Brand	Status	Received	Search order numbers...			Export	Create Order		
ID	Age	Status	Brand	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
☆ 32923	0h	Open	Vendor A	190411	Apr 11, 2019	0 of 1	Small Parcel	FedEx Ground	No

.....Continue to Next Page for Filtering Order Options.....



## 2. Filtering Options for Open Orders

### a. Filter Open Orders by Date Range

To filter your open orders screen by vendor, click the **Brand** filter widget in the top left-hand corner of the page to begin filtering. Once you have selected the vendor(s) you wish to view, the order(s) pertaining to those specific vendors will be displayed.

	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
<input checked="" type="checkbox"/> Vendor A						
<input type="checkbox"/> Vendor B						

### b. Filter Open Orders by Order Status

To filter your open orders screen by Order Status, click the **Status** filter widget in the top left-hand corner of the page to begin filtering. If you want to view only the order(s) in which have yet to be closed out, select "Open" and "In Progress".

ID	Status	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
76	Open	190411	Apr 7, 2019	0 of 1	Small Parcel	FedEx Ground	No
76	In Progress	104291	Apr 1, 2019	0 of 1	Small Parcel	FedEx Ground	No

### c. Filter Open Orders by Date Range

To filter your open orders screen by a specific Date Range, click the **Received** filter widget in the top left-hand corner of the page to begin filtering. If you are searching for open orders within the last week, you can choose a Start and End Date Range or simply check the box for "This Week"

ID	PO #	Received	# Shipped	Ships Via	Shipping Method	Invoiced?
23913	041911	Apr 1, 2019	0 of 1	Small Parcel	FedEx Ground	No