Client Dashboard – Orders View

What is it?

The client dashboard is the go-to location for clients to locate orders, download status reports, respond to questions, and answer quotes.

For any questions or feedback regarding ROS or the Client Dashboard please contact your account manager.

- The client dashboard has a default view of the Orders table which shows the user an overview of case status on their assigned and current orders.
- The client dashboard has a default filter applied of “Show Only Mine” which displays only orders you are assigned to in the table.
- The client dashboard also has a default filter applied to “Hide Orders in Draft”, so the table does not display draft orders.
- To remove default or chosen filters from the table view, click the X by the filter name next to “Show results by:” under the Filter button above the table.
- Use the circular arrow above the Orders table to refresh filter results.
- Use the Filter button to open the filter options to search or refine table results.
- Clicking the hyperlinked Order # in the table will navigate to the Order Details page for the order; we suggest utilizing a right click to open the Order Details page in a new tab to maintain the table results on the dashboard and navigate efficiently.
- On the far right of the table is a vertical ellipsis icon which we refer to as an Action icon or “More Actions” icon. Where this icon exists in the system indicates additional actions can be performed using this button.
- The more action icon within the Orders dashboard, when clicked, provides an option to “Download Status Report” Once selected, an excel file will download that details a view of outstanding requests with their status and notes, saving you time navigating in and out of each request on an order.