

# Using the Order Manager

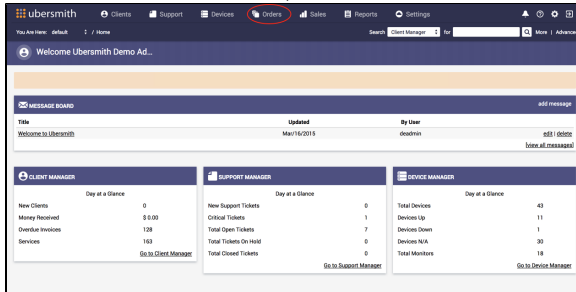
The Order Manager processes, or provisions, new clients and their requested services. New orders enter Ubersmith through an online order form or the API and are funneled into the appropriate order queue.

Multiple types of services can be processed by a single order queue, if the basic steps are the same. If service offerings have different steps, each workflow requires a customized order queue. For example, if your company offers virtual hosting services as well as dedicated servers, you would have separate order queues for each.

Each order queue consists of a series of appropriate order actions that fulfills an order, such as provisioning the client account, adding services, and generating invoices. You will move through each predefined order action in the order until the order is completed.

## Accessing the Order Manager

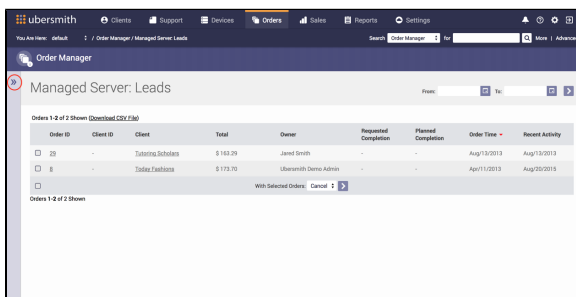
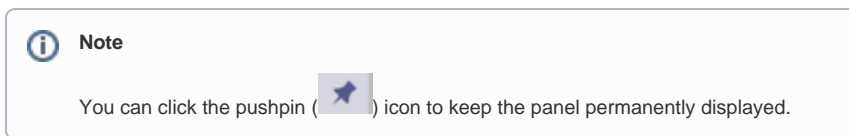
- From the **Ubersmith Dashboard**, click **Orders**.



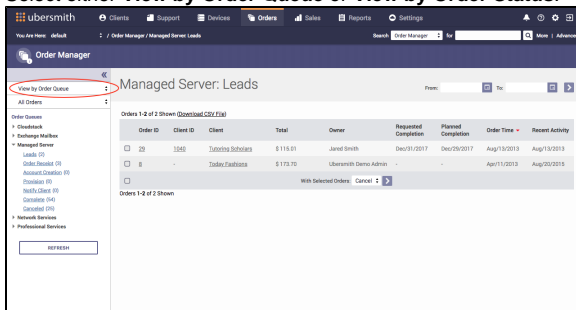
The *Order Manager* page appears.

## Viewing Orders

- Access the *Order Manager*.
- Click the **Order Manager View Panel** arrows to toggle the panel on.



- Select either **View by Order Queue** or **View by Order Status**.

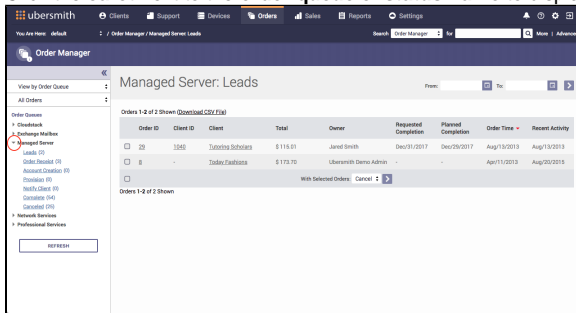


On this page:

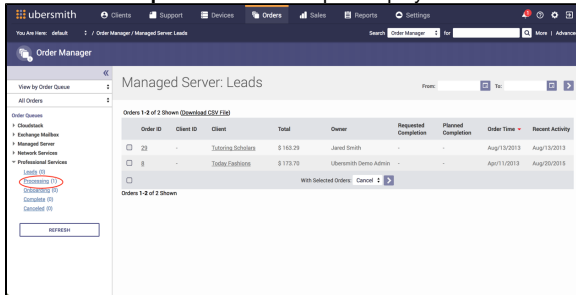
On this page:

- Accessing the Order Manager
- Viewing Orders
- Processing Orders
- Canceling Orders
- Managing Order Communication
  - Completing the Order Date and Ownership Section
  - Replying to a Message or Posting a Followup
  - Adding a Comment
  - Subscribing or Unsubscribing to an Order
  - Sending an Order Link
- Viewing Open/On Hold Tickets
- Viewing Closed Tickets
- Associating Orders with Clients
- Editing Order Information
- Related Topics

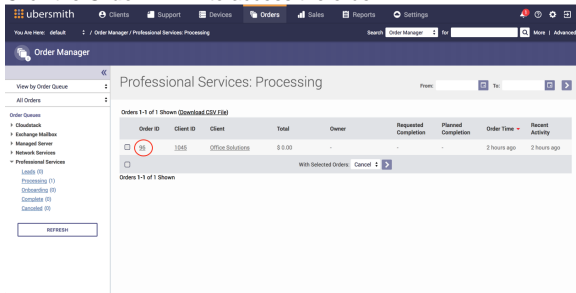
- Click the **caret** next to the **order queue** or **status name** to display the order steps.



- Click the **order queue** or **status** step to display a list of orders in that step.



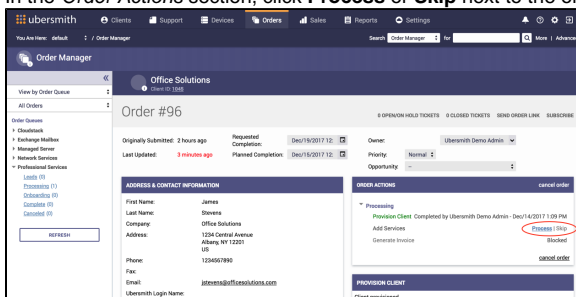
- Click the **Order ID** link to access the order.



The *Order* page appears.

## Processing Orders

- Access the *Order Manager*.
- View the order.
- In the *Order Actions* section, click **Process** or **Skip** next to the order action.



The completed order action turns green and the next order action appears.

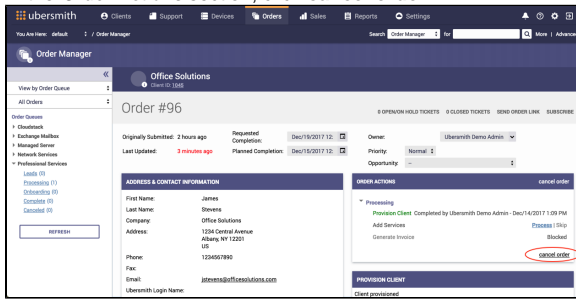
- Continue through each order step's order actions until the **Complete** order step appears. For more information on order steps and order actions, see [Order Queues](#).

## Canceling Orders

Once an order is canceled, it can not be moved back to being in process.

- Access the *Order Manager*.
- View the order.

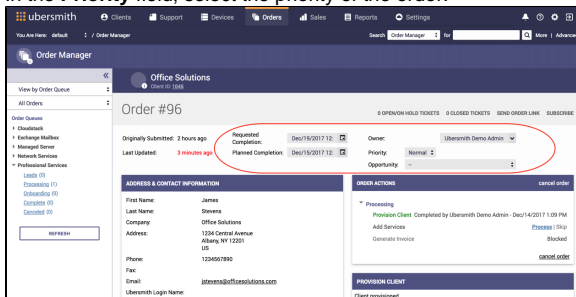
3. In the **Order Actions** section, click **cancel order**.



## Managing Order Communication

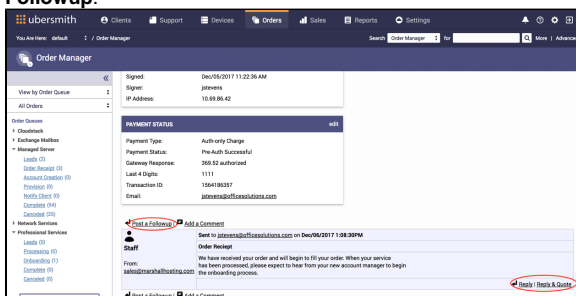
### Completing the Order Date and Ownership Section

1. Access the **Order Manager**.
2. View the order.
3. In the **Requested Completion** field, enter or select the date the order needs to be completed on.
4. In the **Planned Completion** field, enter or select the date the order is expected to be completed on.
5. In the **Owner** field, select the owner of the order.
6. In the **Priority** field, select the priority of the order.



### Replying to a Message or Posting a Followup

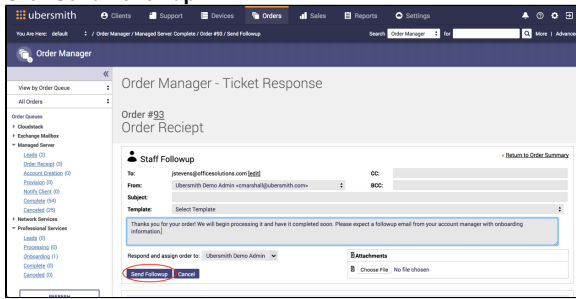
1. Access the **Order Manager**.
2. View the order.
3. In the **Message** section, click **Reply** or **Reply & Quote** for replying to a message or click **Post a Followup**.



The **Order Manager – Ticket Response** page appears.

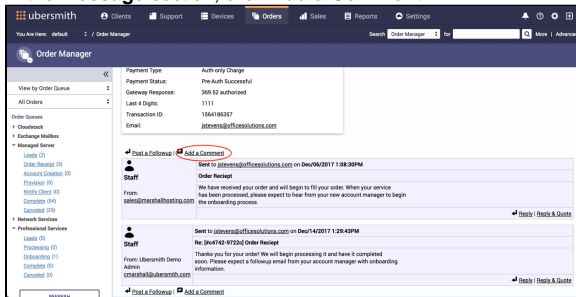
4. In the **To** field, enter the email address of the person to receive the message.
5. In the **Subject** field, enter the subject.
6. In the **Body** field, enter the contents of the message.
7. In the **Respond and assign order to** field, select the appropriate user to assign the order ticket to.
8. Select the **Subscribe to order**, if you want to follow the order.
9. In the **Attachments** section, click **Choose File** and navigate to the attachment you want to include in the message.

## 10. Click **Send Followup**.



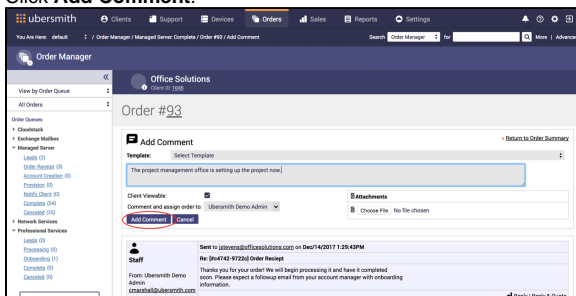
## Adding a Comment

1. Access the [Order Manager](#).
2. View the order.
3. In the **Message** section, click **Add a Comment**.



The **Order Manager – Add Comment** page appears.

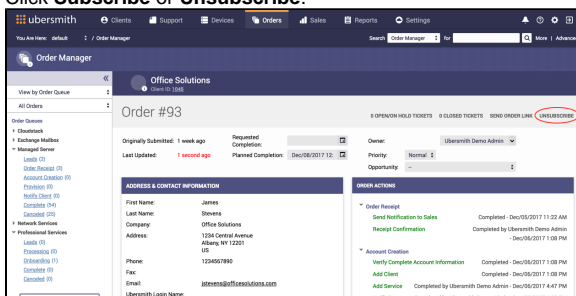
4. In the **Template** field, select an appropriate template.
5. In the **Body** field, enter the contents of the comment.
6. Select **Client Viewable** if you want the client to be able to see your comment.
7. In the **Comment and assign order to** field, select the user you want to assign the comment to.
8. Select the **Subscribe to order**, if you want to follow the order.
9. In the **Attachments** section, click **Choose File** and navigate to the attachment you want to include in the comment.
10. Click **Add Comment**.



## Subscribing or Unsubscribing to an Order

Subscribing to an order sends you a copy of any follow ups, emails, or comments associated with the order.

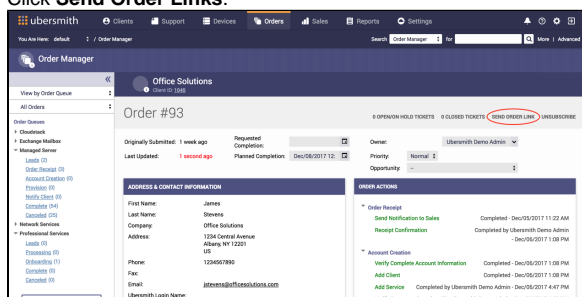
1. Access the [Order Manager](#).
2. View the order.
3. Click **Subscribe or Unsubscribe**.



## Sending an Order Link

If an order was started, but not completed, you can email a link to the order to the client, so they can continue where they left off.

1. Access the [Order Manager](#).
2. View the order.
3. Click **Send Order Links**.



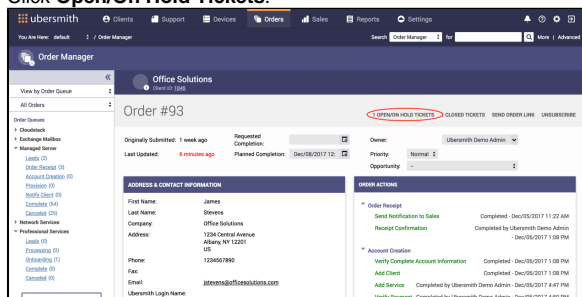
The *Send Order Link* page appears.

4. In the **From** field, enter the email address of the person sending the link.
5. In the **Subject** field, enter the subject.
6. In the **Message** field, enter the contents of the message.
7. In the **Attachments** section, click **Choose File** and navigate to the attachment you want to include in the comment.
8. Click **Send Mail**.

The screenshot shows the 'Send Order Link' form. It has fields for 'To:', 'From:', 'CC:', 'BCC:', 'Subject:', and 'Message:'. The 'To:' field is filled with 'jstevens@officesolutions.com'. The 'From:' field is filled with 'cmarshall@ubersmith.com'. The 'Subject:' field is filled with 'Professional Services Order on 12/15/2017'. The 'Message:' field contains a pre-filled text: 'Thank you so much for your interest in our service. Please click the order to continue. Please don't hesitate to call if you have any questions.' Below the message field is a '[View Variables]' link. At the bottom is an 'Attachments' section with a 'Choose File' button and 'No file chosen' text. At the very bottom are 'Send Mail' and 'Cancel' buttons, with 'Send Mail' highlighted.

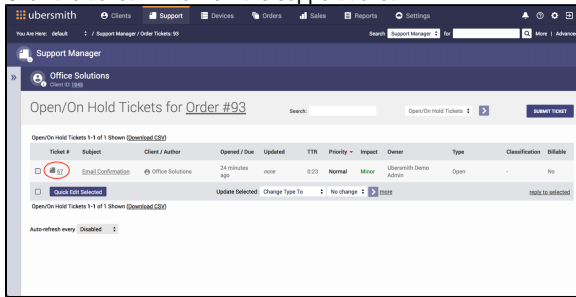
## Viewing Open/On Hold Tickets

1. Access the [Order Manager](#).
2. View the order.
3. Click **Open/On Hold Tickets**.



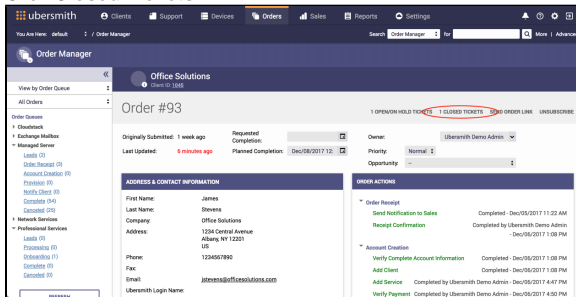
The *Open/On Hold Tickets* page appears with a list of tickets associated with the order.

- Click the ticket link to view the support ticket.



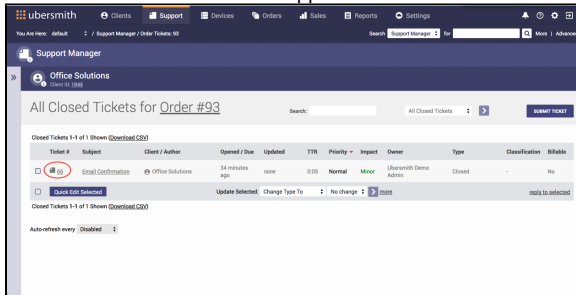
## Viewing Closed Tickets

- Access the [Order Manager](#).
- View the order.
- Click **Closed Tickets**.



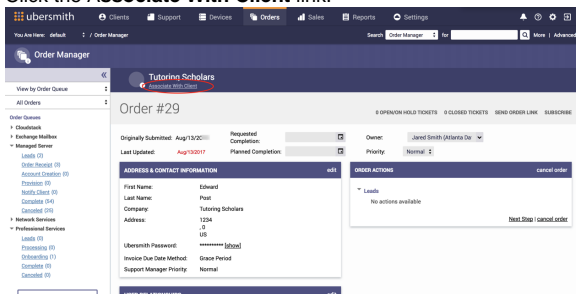
The **Closed Tickets** page appears with a list of tickets associated with the order.

- Click the ticket link to view the support ticket.



## Associating Orders with Clients

- Access the [Order Manager](#).
- View the order.
- Click the **Associate With Client** link.



The **Associate Order** page appears.

- In the **Search** field, select the search criteria.
- In the **For** field, enter the appropriate information for the select search criteria, such as name of client when Client is select.
- Click the **Search** button.
- In the **Search Results** section, select the appropriate result.

8. Click **Associate with Client**.

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## Associate Order

Find a Client

Search Client

For \*

Search Results

- ☐ 1001 Cogswell Cogs  
123 Golden Lanes Springfield, MA 12345 United States  
Company Name: Cogswell Cogs  
Client Name: John Cogswell
- ☒ 1045 Office Solutions  
1234 Central Avenue Albany, NY 12201 United States  
Company Name: Office Solutions  
Client Name: James Stevens
- ☐ 1019 Starrett Services  
2435 Congress Street Daphne, AL 12345 United States  
Company Name: Starrett Services  
Client Name: Ken Starrett
- ☐ 1036 Trusted Law  
1234 Broadway Street Setting  
Company Name: Trusted Law  
Client Name: Alex Hamilton

Associate Client Search Cancel

## Editing Order Information

1. [Access the Order Manager.](#)
2. [View the order.](#)
3. Click **edit** in the section you want to update.

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## Order Manager

Order #29

Originaly Submitted: Aug 13, 2017 Requested Completion: Dec 31, 2017 12:00 PM Owner: Jared Smith (jared.smith@ubersmith.com)

Last Updated: Aug 13, 2017 Planned Completion: Dec 29, 2017 12:00 PM Priority: Normal Opportunity: 1

ADDRESS & CONTACT INFORMATION
First Name: Edward
Last Name: Post
Company: Tutoring Scholars
Address: 1234
City: Albany
State: NY 12245
Phone: 1234567890
Fax:
Email: edominguez@customtailoring.com
Ubersmith Login Name:

ORDER ACTIONS

\* Leads: No actions available

Next Step: cancel order

Save Cancel

The **Edit** page appears.

4. Make any necessary changes.
5. Click **Save**.

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## Edit Order Address & Contact Information

Tutoring Scholars  
Order ID: 29

Details Account Info

First Name: Edward

Last Name: Post

Company: Tutoring Scholars

Address: 1234

City: Albany

State: New York Zip: 12345

Country/Territory: United States

Phone: 1234567890 Fax:

Email: edominguez@customtailoring.com

Login: Password: 0a48788

Save Cancel

## Related Topics

[Working With Order Queues](#)

[Adding Order Queues](#)

[Configuring Order Queues](#)

[Managing Order Queues](#)

[Adding Order Forms](#)

