



Before working with orders regularly, configure a list layout that presents the information needed for your role. Layouts control the saved arrangement of columns in the Orders list.

1. Open the Orders list and select the **icn icn-settings** control to access list settings.



## orders

2. To change which fields are displayed, select **Columns Chooser**. Select the columns required for your review, such as job number, client, job title, order price, forecast delivery date, or total budget.
3. Decide how to handle the revised layout:
  - Select **Add Layout** to create a new layout.
  - Enter a value in **Layout name** to identify the layout.
  - Select **Save** to retain the new layout.
  - Select **Cancel** if you do not want to keep the new layout.
4. If you are working with an existing layout, select **Update Current** to save your changes to the currently selected layout. Select **Delete Current** when the current saved layout is no longer required, then confirm with **Delete** if prompted.

**Note:** Use a descriptive layout name that identifies its purpose, such as “PM Delivery Review” or “Finance Order Value Review.” This helps users select the appropriate view without changing columns each time.

## Workflow

1. Start from the Orders list and review the current layout selected in **Standard Layout** or another saved layout. Use the visible columns to identify the orders relevant to your work.
2. **Need to locate a specific order?** Enter a job number, client name, job title, or another known value in **Search**. Review the resulting rows and confirm the order using the displayed job and commercial information.
3. **Need a project-management order view?** Select **PM** from the tab bar. This shows the Orders list in the PM stage view.
4. **Need different information in the list?** Select **Columns Chooser** and adjust the displayed columns. Then choose one of the following outcomes:
  - Select **Update Current** when the changes should apply to the current saved layout.
  - Select **Add Layout**, provide a **Layout name**, and select **Save** when the changes should become a separate reusable layout.
  - Select **Cancel** when you want to discard the layout changes.
5. **Need to refresh the displayed information?** Select **icn-update**. Review the list again after the update, especially when checking order price, forecast delivery date, or total budget values.
6. **Need to share or analyze the displayed list outside the application?** Apply the required search and layout first, then select **Export**. Export only after confirming that the visible records and columns match the intended review.

**Tip:** Filter the list before exporting. An export reflects the information currently presented in the Orders list, so searching first helps prevent unnecessary records from being included.

## PM

The PM tab contains order records used for project-management review. Each row identifies a sales job through information such as the job number, client, job title, order price, forecast delivery date, and total budget. Use this tab to locate the relevant sales job and review its commercial and delivery-related summary information.

The available controls show the PM view and support searching, refreshing, changing list layouts, and exporting. No control is provided on this screen for moving an order into or out of the PM tab.

## Examples

A project manager needs to review an order for a client before discussing the expected delivery date and project value.

1. Open the Orders list.
2. In **Search**, enter the client name or the known job number. Review the matching result using the **Client**, **Job title**, **Order price €**, and **Forecast delivery date** columns.
3. Select **PM** to work from the project-management order view.
4. If the forecast delivery date is not visible in the selected layout, select **Columns Chooser** and add the required column. To retain this view for future delivery reviews, select **Add Layout**, enter **PM Delivery Review** in **Layout name**, and select **Save**.
5. Select **icn-update** before using the list in the meeting, then verify the displayed order price and forecast delivery date.
6. Select **Export** if the project manager needs to provide the filtered order list for offline review.

**Tip:** Keep commercial-value columns and delivery-date columns together in a PM layout so that job profitability and delivery discussions begin from the same order view.

## Tips

**Tip:** Select **Standard Layout** when you need to return to the standard list arrangement after using a role-specific saved layout.

**Warning:** Select **Update Current** only when you intend to change the currently saved layout. Use **Add Layout** and **Save** when you want to preserve the existing layout and create a separate version.

## Troubleshooting

| Symptom                                                  | Likely cause                                                         | Fix                                                                                                                                        |
|----------------------------------------------------------|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| The required order is not visible.                       | The list is not filtered by the correct job, client, or title value. | Enter the available identifying information in <b>Search</b> and review the matching rows.                                                 |
| Required order information is missing from the list.     | The selected layout does not include the required column.            | Select <b>Columns Chooser</b> , add the required column, and use <b>Update Current</b> or save a new layout.                               |
| A layout change was not retained.                        | The changes were cancelled or not saved.                             | Select <b>Add Layout</b> , provide a <b>Layout name</b> , and select <b>Save</b> ; or select <b>Update Current</b> for an existing layout. |
| The list does not show the expected current information. | The displayed list has not been refreshed.                           | Select <b>icn-update</b> and review the updated rows.                                                                                      |

## Related pages

- [List](#)
- [delivered orders](#)
- [projects management — Learning Path](#)
- [projects management — Overview](#)
- [projects management](#)
- [List](#)
- [shipping order](#)