



Planon Live - Orders app

Version: L105

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols



	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About the Orders app module

The **Orders** app module can be used within the **Planon Live** app. The Planon Live app is the 'shell' application that you can download from the relevant app store. It can hold various *licensed* apps / app modules, such as: **Orders, Work assignments, Properties, Materials, Mobile observations**, the **Mobile Condition Assessor app** and **Assets**.

-  Like all Planon Live app modules, the **Orders** app is configurable, through web definitions. This means that names, labels, etc. used in this user documentation may differ from what you see in your app.
-  For more information on adding and configuring licensed app modules in the Planon Live app, see [About Planon Live - App Configuration](#).

Working with the Planon Live Orders app

This section describes the various functions available for the Planon Live **Orders** app module.

Searching orders in the Planon Live Orders app

You can find orders using the search bar, by typing search terms or parts of search terms.

Procedure

1. Open the Planon Live app > Orders.

As names of the app modules are configurable, Orders can have a different name in your app.

2. Type (part of) a search term in the search bar and confirm via you keypad.

Example: if you are looking for an order about fixing a boiler, enter (part of) the description: *boiler*. Or - if you know it, (part of) the code: *132.01*.



If you confirm the search in an *empty* search bar, you will get a list with all orders. Alternatively, you can use the (quick) filter to limit your search results.

3. Select the relevant order from the list of results, to view more details on the Summary page.

Using quick filters on the search bar and viewing order details

You can refine your queries in the search bar by using the available quick filter options.

Procedure

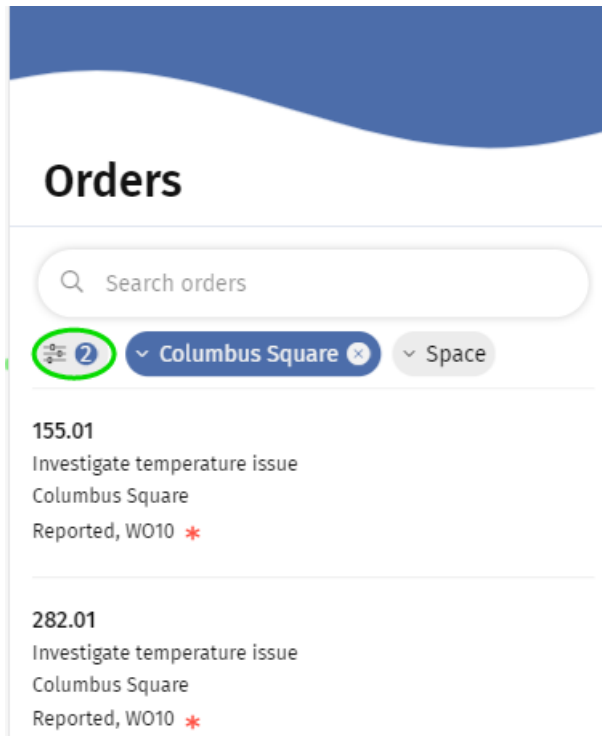
1. Open the Planon Live app > Orders module.



As names of the app modules are configurable, **Orders** can have a different in your app.

2. You can activate a quick filter and apply it to your query by tapping the Select filters icon, selecting relevant criteria on the Filters page and tapping Apply.

Active quick filters are highlighted in a contrasting color. The Filter icon shows the number of active quick filters. Tap the drop-down symbol (v) on a quick filter to open the list of filters. Deactivate the quick filter by tapping the cross. Scroll from left to right to see all quick filters.



3. From the list of results, select an order directly to view its details,

or if the list is too long ...

4. ... adjust your filter(s) and / or edit your search term and tap the search icon on your keyboard again.
5. Select an order to view its details.

On the order's Summary page you can tap a block, for example Work assignment details to navigate to a page where you can view or edit specific details.

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