Customer Dashboard

TL;DR

> This report answers what one customer has ordered and what has been shipped to them. A customer must be chosen before anything appears. Two of the tiles across the top add up only the rows currently on screen, so they can disagree with the counts beside them.

What this answers

For one chosen customer: every purchase order they have placed, and every invoice raised for them, with totals across the top. Customer-first, where the Item Dashboard is product-first.

Before you start

A customer must be chosen. Until then the screen shows "Select a Customer" panels reading "Choose a company & customer above, then click Load Data to see orders here." and "…to see dispatches here.". **The button those panels mean is labelled "Apply".** Nothing on the screen is labelled "Load Data". Pressing "Apply" without a customer shows "Please select a customer to load data.".

Filters

Filter	Required	Notes
Date Range	No	Purchase Orders table: the order date. Dispatches: the invoice date
Company ("Select Company")	No	**Narrows the customer list only. It does not filter the tables.** Chosen for you automatically when you are assigned exactly one

Filter	Required	Notes
Customer ("Select Customer")	**Yes**	Marked with a red asterisk
Purchase Order Status ("Select Purchase Order Status")	No	"Pending", "In Progress", "Complete", "Partially Dispatched"
Invoice Status ("Select Invoice Status")	No	"In Progress", "Complete", "Delivered". No Delete choice, because removed invoices never appear on this report

"Apply" refreshes both tables; "Reset" clears everything and returns to the panels.

The Company filter deserves a second warning: whatever company is picked, both tables show the customer's rows from **every company you can see**. The picker exists to help find the customer, nothing more.

The four totals

Across the top: "Total Orders", "Total Dispatches", "Total Orders Qty", "Total Dispatch Qty", plus badges like "137 Orders" and "12 Dispatches".

The two counts are **true totals**. The two quantity tiles are **not**. They add up only the rows currently on screen, ten unless the rows-per-page selector was changed. "Total Orders: 137" can sit beside an orders quantity that covers ten rows.

The workaround: set the rows-per-page selector to "All" (or a size covering everything) on each table, and the quantity tiles become correct.

Columns

Purchase Orders table:

Column	What it holds
PO Number	The order
PO Date	Day-month-year
Sales Order No	Or a dash when empty
Delivery Date	Or a fallback when empty
Status	The order's status badge. "Partially Dispatch" is spelled so here
Total Qty	The order's total quantity

Column	What it holds
Total Amount	With the order's currency sign

Default order: by status rank, then most recently changed first.

Dispatches table:

Column	What it holds
Invoice No	The invoice
Invoice Date	Day-month-year
PO Numbers	All orders billed on it, or "—" when none
Dispatch Qty	The invoice's total dispatch quantity
Total Amount	The invoice's total
Status	"In Progress", "Complete" or "Delivered". "Complete" here means complete but not yet delivered
Port of Loading	"N/A" when empty
Port of Discharge	The same
Transport Mode	The same
Dispatch Name	The same

Default order: by status rank: In Progress first, then Delivered, then Complete. Inside the Delivered group, the most recently changed invoices come first.

Which rows appear

- **Purchase Orders**: the customer's orders, excluding those whose status is Delete. Only your assigned companies.
- **Dispatches**: the customer's invoices: **including those still in progress**, unless the Invoice Status filter narrows them. Removed invoices are left out.

Exporting

Both tables offer "Excel", "Excel All", "CSV", "CSV All" built in the browser, plus "PDF" and "PDF All" built by the system. "PDF" covers the current screen's rows; "PDF All" covers everything matching. A failure shows "Unable to generate PDF".

The orders PDF is titled "Customer Purchase Orders Report" and carries a "Date Range: … to …" line; the dispatches PDF is titled "Customer Dispatches Report".

One status, three spellings

The same order state is spelled three ways on this one report. Quoted exactly, where each appears:

- The table badge: "Partially Dispatch"
- The filter option: "Partially Dispatched"
- The exported orders PDF: "Partially Dispatched". Its wording list also contains "Deleted" and "Unknown", though no row in those states can reach the PDF

And the dispatches PDF heads its status column "Invoice Status" where the screen column is headed "Status". All of these mean what their nearest match means; none is a different state.

Things to watch

- The quantity tiles and the company filter, both above, are the two most-reported "faults" of this screen, and both are how it is built.

FAQs

Why do the quantity tiles disagree with the counts beside them?

The two counts are true totals, but the two quantity tiles add up only the rows currently on screen, ten unless the rows-per-page selector was changed. Set the selector to "All" on each table and the quantity tiles become correct.

Why does picking a company not change the tables?

The Company filter narrows the customer list only; it does not filter the tables. Whatever company is picked, both tables show the customer's rows from every company you can see.

Where is the "Load Data" button the panels mention?

Nothing on the screen is labelled "Load Data". The button the panels mean is labelled "Apply".

Why do in-progress invoices appear in the Dispatches table?

The table includes the customer's invoices still in progress by design, unless the Invoice Status filter narrows them. Removed invoices are left out.

Are "Partially Dispatch" and "Partially Dispatched" different states?

No. The same order state is spelled three ways on this report: the table badge says "Partially Dispatch" while the filter option and the exported orders PDF say "Partially Dispatched". None is a different state.

Why does the dispatches PDF say "Invoice Status" where the screen says "Status"?

They are the same column under two headings. Each means what its nearest match on screen means.

Related pages

- About the reports: filters and exports, shared behaviour
- Item Dashboard: the same idea, product-first; its totals are all true totals
- Purchase order statuses: what the statuses mean

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