Webinar - Deep Dive Q&A

Last Modified on 10/02/2025 4:25 pm EDT

View on YouTube

Additional Resources

- Order Time B2B Portal
- Order Time Rentals
- Order Time Pay

Unanswered Questions That Were Cut Off

- Is it possible to add 'available' as a column option in Sales Orders > Dependency tab. This would help makes linked 'work order' decisions without needing to look up all the items separately.
 - We added a Feature request for this
- We are currently sending invoices out of QBO. Is it possible to add multiple emails to the Billing email address field? For example, we often need to send an invoice to multiple email addresses, but right now, it appears that Order Time only allows us to add 1 email address to the Billing Email address field. Is it possible to add multiple emails with a; or a,
 - Unofficially adding a semicolon and no spaces between emails works: email@ordertime.com;email2@ordertime.com
- Inventory Valuation report is limited to 5000 lines but we typically have between 15,000to 20,000 lines; is there a way to expand the limit?
 - No causes webpage to crash trying to load that much data. Export to CSV and review there to see all OR filter for smaller item sets.
- Who is the best person at OT to discuss pricing, and what is included in our OT account to ensure we are utilizing it to the fullest capability?
 - kaitlyn.tolson@numbercruncher.com
- For Price Levels, there is no filter by native price level
 - We have a potential customization for this, please send a ticket and mention it
- Does OT record the date when a PO is approved or sent?
 - Audit trail report shows status changes by date and time. Feature request or CAR to have specific fields on the transaction for each. Send in a ticket for that customization if you need it right away.
- if you've selected to always create a new ship doc, can you still add items to an existing ship doc? or would you have to delete an existing and recreate a new ship doc to include everything?
 - Yes but manually using the Select items to ship button. If you use the standard create new ship doc button it will create a new SD if that is how your preference is set up.
- What CRM is being used with Zapier?

- We have some customers using Zapier to connect Pipedrive and HubSpot with Order Time
- Here is more about the **Zapier Integration**
- How do you create a new "Relation" category under the Item Relation/Related Items tab?
 - Not an option for users. It's a system field and has functionality attached. What would you be looking for and what would be its function - please send in a ticket to include more details.

As always, if you have additional questions about any of these topics or require additional assistance, please reach out to support@ordertime.com.