

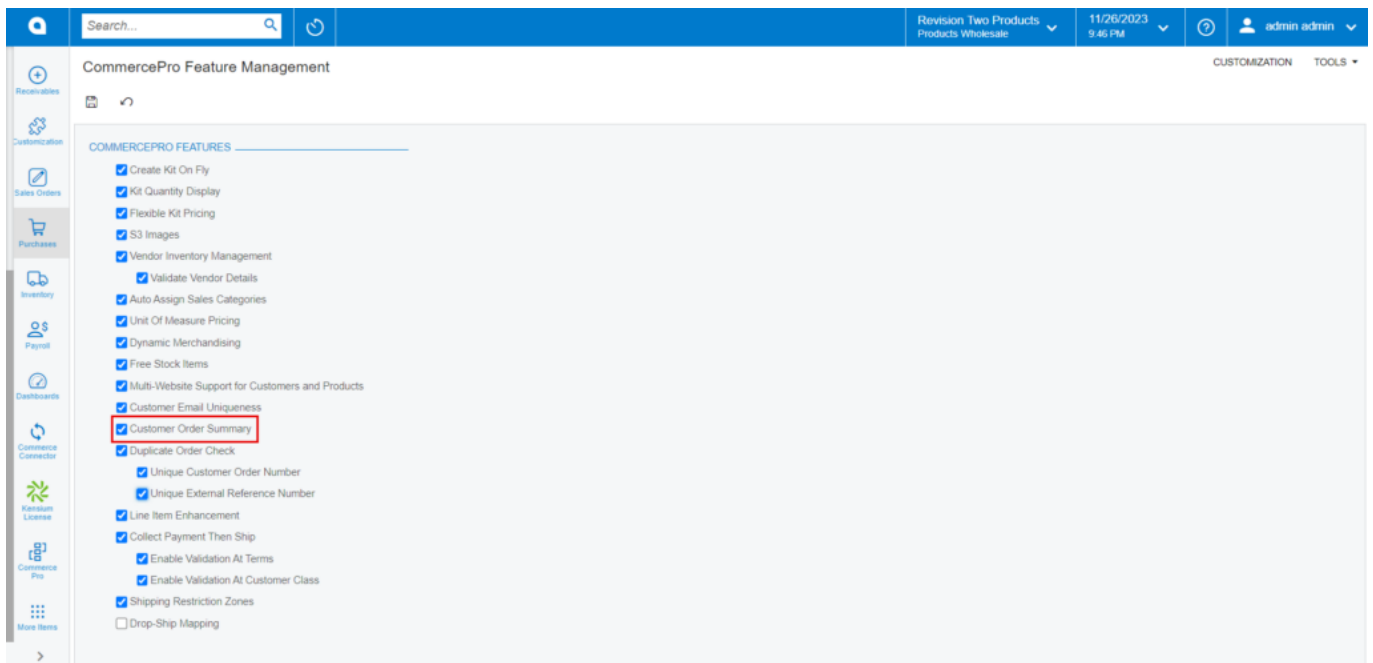
# Customer Order Summary

A snapshot of a customer's value and recent order details can now be viewed on the Order Summary tab. The Order Summary screen includes the shipment and tracking details, a lifetime order value summary, and last quote information.

1. To access **[Customer Order Summary]**, you must enable the check box for **[Customer Order Summary]**, under CommercePro Features.
2. Click on **[Save]**.

The Impacted areas for Dynamic Merchandising are below.

1. Customer Order Summary Preferences
2. Customer Order Summary Processes
3. Customers



## CommercePro

You need to search for **[Customer Order Summary]** in the Global search bar.

customer Order summary | Revision Two Products Products Wholesale | 11/26/2023 11:10 PM | admin admin

MENU ITEMS (6) TRANSACTIONS AND PROFILES HELP TOPICS FILES

Receivables

Customization

Sales Orders

Purchases

Inventory

Payment

Dashboards

Commerce Connector

Kensium License

Commerce Pro

More Items

Processes Preferences

Customer Order Summary Customer Order Summary

Process Customer Order Sum...

Commerce Pro

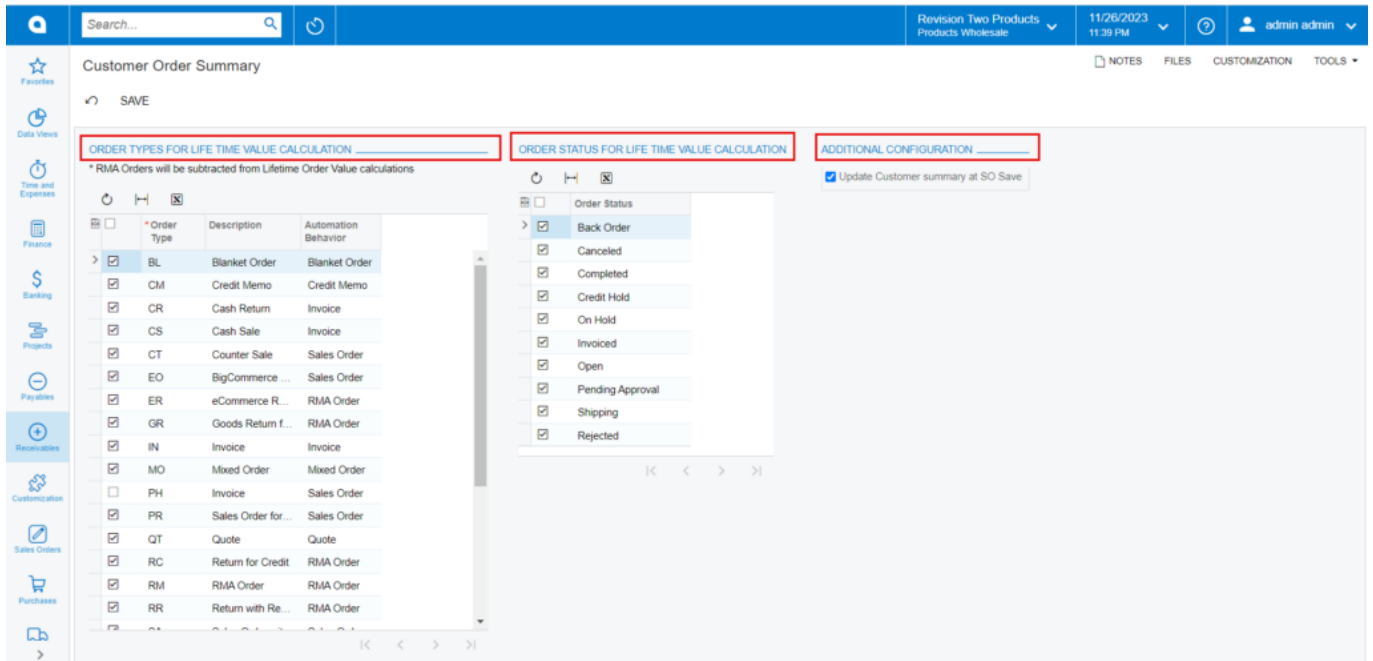
Processes Preferences

Customer Order Summary Customer Order Summary

Process Customer Order Sum...

## Customer Order Summary

1. Click on **[Customer Order Summary]**.



Customer Order Summary

SAVE

ORDER TYPES FOR LIFE TIME VALUE CALCULATION

\* RMA Orders will be subtracted from Lifetime Order Value calculations

Order Type	Description	Automation Behavior
<input checked="" type="checkbox"/>	BL	Blanket Order
<input checked="" type="checkbox"/>	CM	Credit Memo
<input checked="" type="checkbox"/>	CR	Cash Return
<input checked="" type="checkbox"/>	CS	Cash Sale
<input checked="" type="checkbox"/>	CT	Counter Sale
<input checked="" type="checkbox"/>	EO	BigCommerce ...
<input checked="" type="checkbox"/>	ER	eCommerce R...
<input checked="" type="checkbox"/>	GR	Goods Return f...
<input checked="" type="checkbox"/>	IN	Invoice
<input checked="" type="checkbox"/>	MO	Mixed Order
<input type="checkbox"/>	PH	Invoice
<input checked="" type="checkbox"/>	PR	Sales Order for...
<input checked="" type="checkbox"/>	QT	Quote
<input checked="" type="checkbox"/>	RC	Return for Credit
<input checked="" type="checkbox"/>	RM	RMA Order
<input checked="" type="checkbox"/>	RR	Return with Re...

ORDER STATUS FOR LIFE TIME VALUE CALCULATION

Order Status

- Back Order
- Canceled
- Completed
- Credit Hold
- On Hold
- Invoiced
- Open
- Pending Approval
- Shipping
- Rejected

ADDITIONAL CONFIGURATION

Update Customer summary at SO Save

### Customer Order Summary (1)

- Order Types for Lifetime Value Calculation:** When you select a specific order type and order status, the number of orders you have placed, together with the sales orders with each specific customer, will be shown on the customer screen.
- Order Status for Lifetime value Calculation:** The status of the sales orders depends on the enabled radio button in **[Order Status]**.
- Additional Configuration:** If this radio button **[Update Customer Summary at SO save]** is enabled, then only specific order count will be added to the customer for the created sales orders following the **[SAVE]** button click.
- You need to navigate to **[Customers]** under **[Profiles]** then check for the Order Summary Details for a particular customer.



customer

Revision Two Products  
Products Wholesale

11/27/2023  
12:15 AM

admin admin

MENU ITEMS (62) TRANSACTIONS AND PROFILES HELP TOPICS FILES

Data Views

Inquiries

- Rejected Customer Refunds
- Customers on Credit Hold
- Unsent Customer Documents
- Unsent Customer Statements
- Customers over the Credit Limit
- Customer Details
- Customer Summary

Projects

Reports

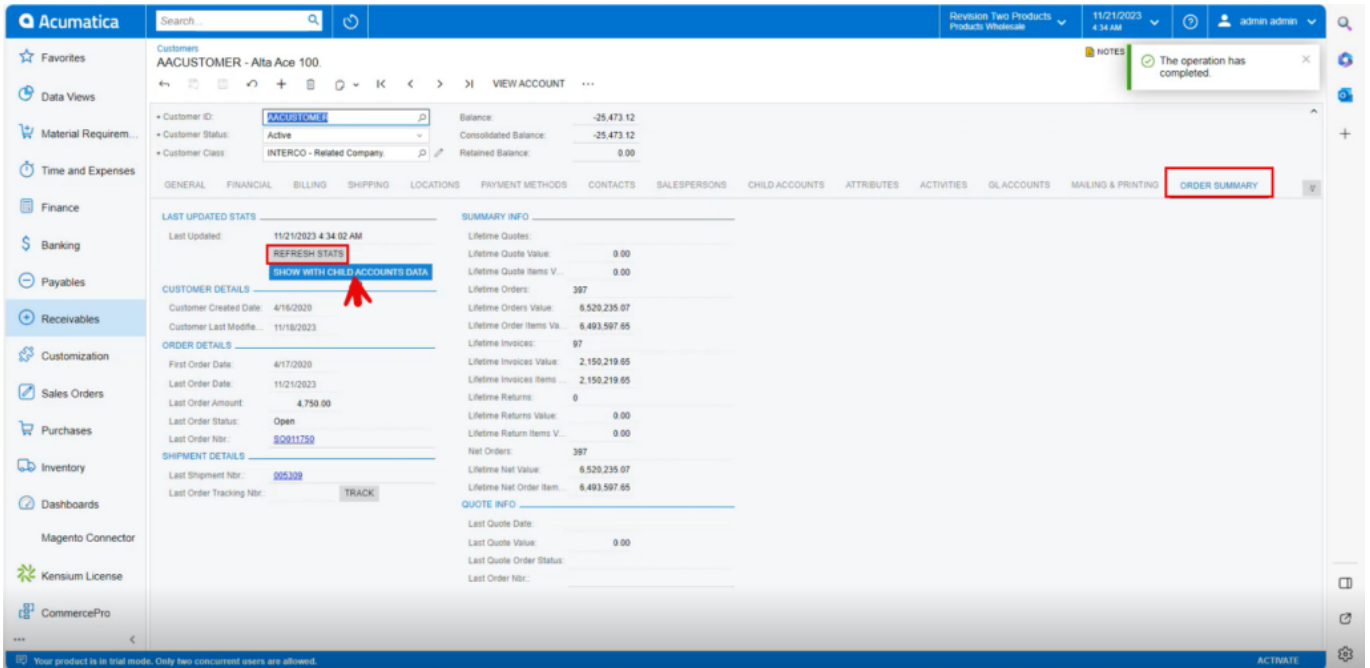
- AR Open Documents by Custo...

Receivables

Profiles	Inquiries	Reports	Profitability Analysis
<b>Customers</b>	Customer Details	AR Balance by Customer	Sales Profitability by Salesperso...
Customer Locations	Customer Summary	AR Open Documents by Custo...	Sales Profitability by Customer ...
Customer Payment Methods	Customer Statement History	AR Balance by Customer MC	Sales Profitability by Customer ...
Processes	Dunning Letter History by Custo...	Customer Summary	Preferences
	Discrepancy by Customer	Customer Profiles	

## Customers

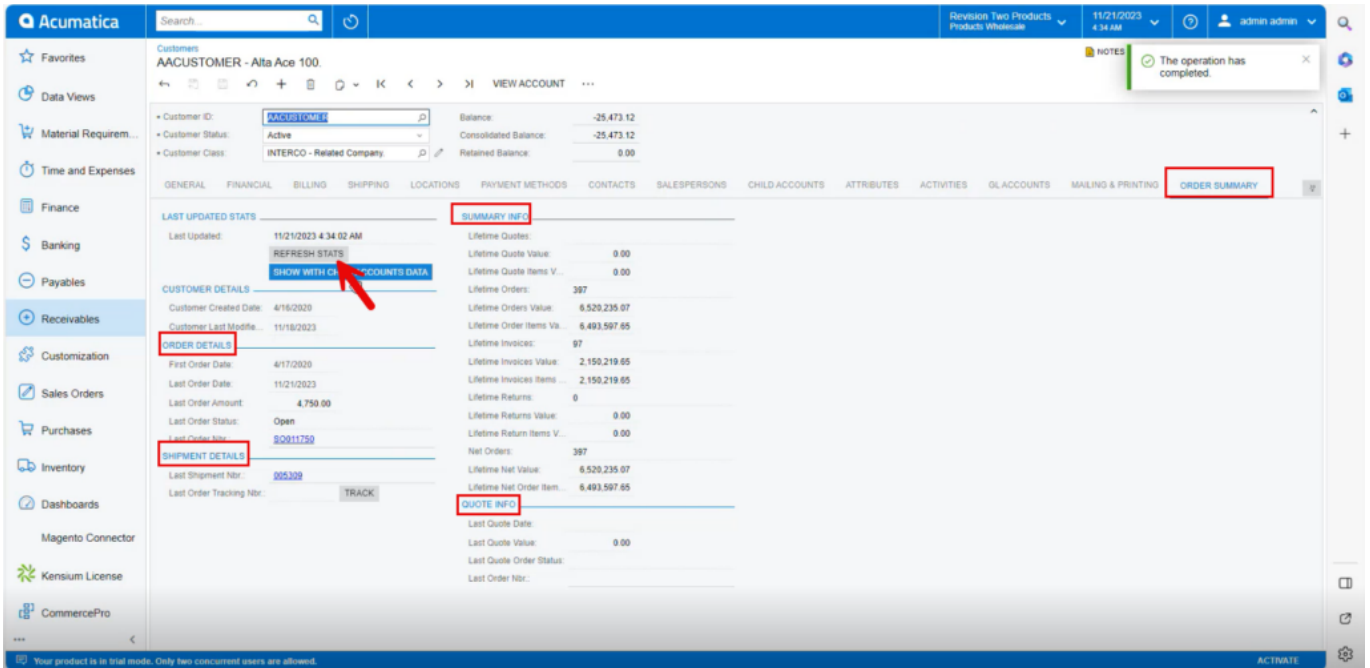
1. Click on **[ORDER SUMMARY]**.



The screenshot shows the Acumatica interface for customer AACUSTOMER - Alta Ace 100. The 'LAST UPDATED STATS' section displays the last update time as 11/21/2023 4:34:02 AM. Below this, there are two buttons: 'REFRESH STATS' (highlighted with a red box and a red arrow) and 'SHOW WITH CHILD ACCOUNTS DATA'. The 'CUSTOMER DETAILS' section shows the customer was created on 4/16/2020 and last modified on 11/18/2023. The 'ORDER DETAILS' section shows the first order date as 4/17/2020 and the last order date as 11/21/2023. The 'SHIPMENT DETAILS' section shows the last shipment number as 005209. The 'SUMMARY INFO' section provides various financial metrics such as Lifetime Quotes Value, Lifetime Orders Value, and Lifetime Invoices Value. The 'QUOTE INFO' section shows the last quote date and value.

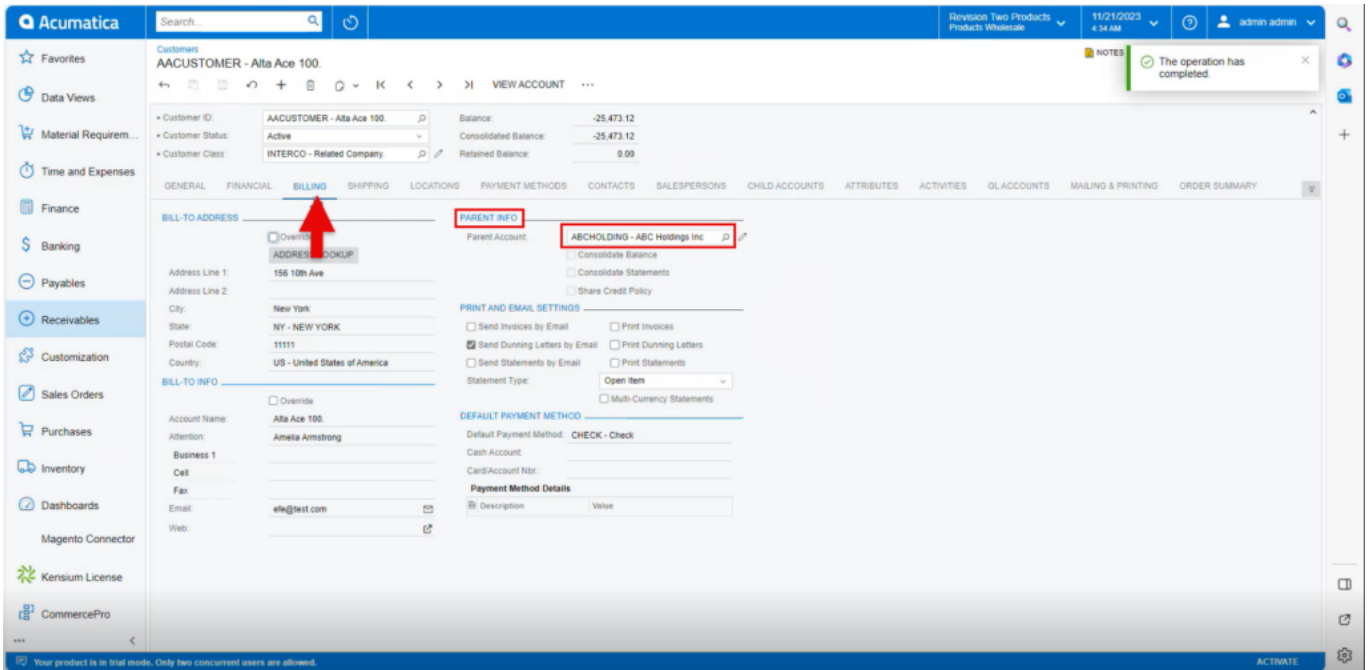
## Customers (1)

1. You can find **[LAST UPDATES STATS]**, **[CUSTOMER DETAILS]**, **[ORDER DETAILS]**, **[SHIPMENT DETAILS]**, **[SUMMARY INFO]**, **[QUTO INFO]**.
2. If you click on **[Refresh Stats]**, the most recent order placed will sync and update with time and date in **[Last Synced]** column.



## Refresh Status

1. You can view the **[Parent Info]** under **[BILLING]**.
2. The **[Customer ID]** is the parent, and the customer is child, according to the **[Parent Account]** section under parent details.



Acumatica

Customers  
AACUSTOMER - Alta Ace 100.

Balance: -25,473.12  
Consolidated Balance: -25,473.12  
Retained Balance: 0.00

GENERAL FINANCIAL **BILLING** SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS CHILD ACCOUNTS ATTRIBUTES ACTIVITIES GLACCOUNTS MAILING & PRINTING ORDER SUMMARY

**BILL TO ADDRESS**

Override  
**ADDRESS BOOK**

Address Line 1: 156 10th Ave  
Address Line 2:  
City: New York  
State: NY - NEW YORK  
Postal Code: 11111  
Country: US - United States of America

**BILL-TO INFO**

Override  
Account Name: Alta Ace 100  
Attention: Amelia Armstrong  
Business 1:  
Cell:  
Fax:  
Email: [efe@test.com](mailto:efe@test.com)  
Web:

**PARENT INFO**

Parent Account: **ABCOLDING - ABC Holdings Inc**

Consolidate Balance  
 Consolidate Statements  
 Share Credit Policy

**PRINT AND EMAIL SETTINGS**

Send Invoices by Email  Print Invoices  
 Send Dunning Letters by Email  Print Dunning Letters  
 Send Statements by Email  Print Statements  
Statement Type: **Open Item**  
 Multi-Currency Statements

**DEFAULT PAYMENT METHOD**

Default Payment Method: **CHECK - Check**  
Cash Account:  
Card/Account Nbr:  
**Payment Method Details**  
 Description  Value

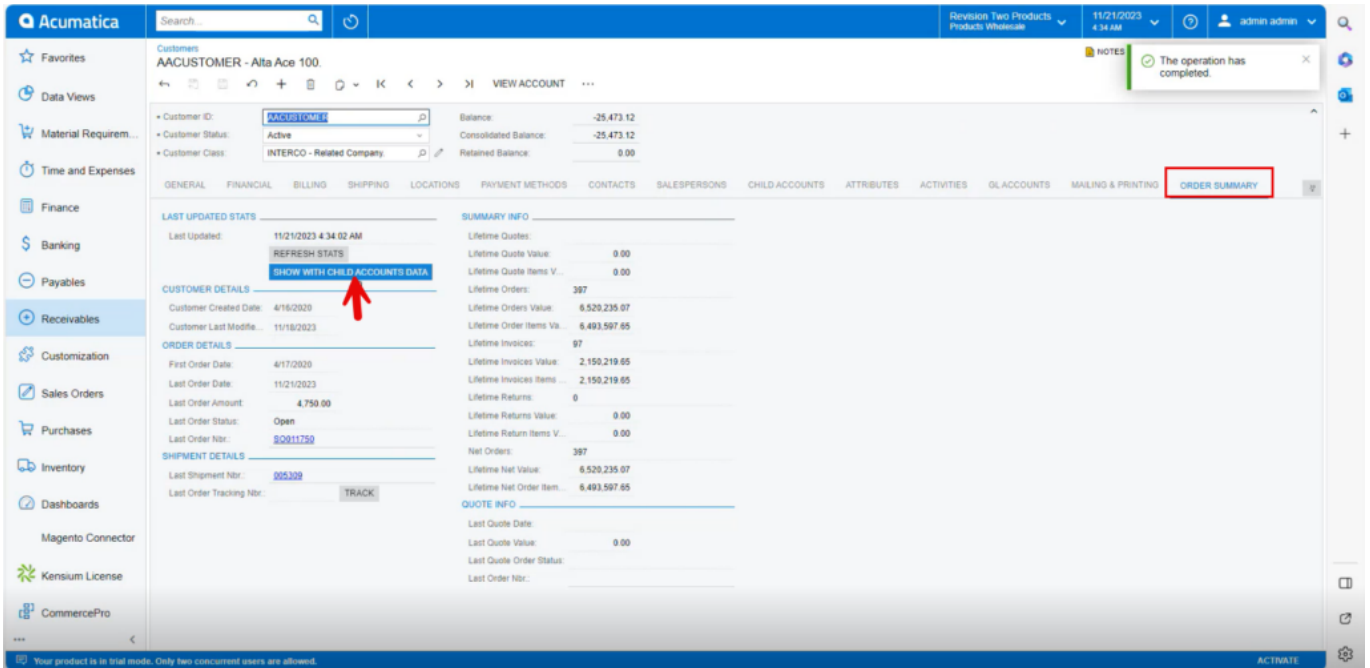
NOTES: The operation has completed.

Revision Two Products Product Wholesale 11/21/2023 4:34 AM admin admin

Your product is in trial mode. Only few core account users are allowed. ACTIVATE

## Parent Info

1. If you place an order with **[Parent Account]** then those details will be available in order summary, click on **[SHOW WITH CHILD ACCOUNTS DATA]** to view order info.



Acumatica

Customers  
AACUSTOMER - Alta Ace 100

Customer ID: AACUSTOMER Balance: -25,473.12  
Customer Status: Active Consolidated Balance: -25,473.12  
Customer Class: INTERCO - Related Company Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS CHILD ACCOUNTS ATTRIBUTES ACTIVITIES GL ACCOUNTS MAILING & PRINTING **ORDER SUMMARY**

LAST UPDATED STATS  
Last Updated: 11/21/2023 4:34:02 AM  
REFRESH STATS  
SHOW WITH CHILD ACCOUNTS DATA

CUSTOMER DETAILS  
Customer Created Date: 4/16/2020  
Customer Last Modified: 11/18/2023

ORDER DETAILS  
First Order Date: 4/17/2020  
Last Order Date: 11/21/2023  
Last Order Amount: 4,750.00  
Last Order Status: Open  
Last Order Nbr.: 80811750

SHIPMENT DETAILS  
Last Shipment Nbr.: 805309  
Last Order Tracking Nbr.: TRACK

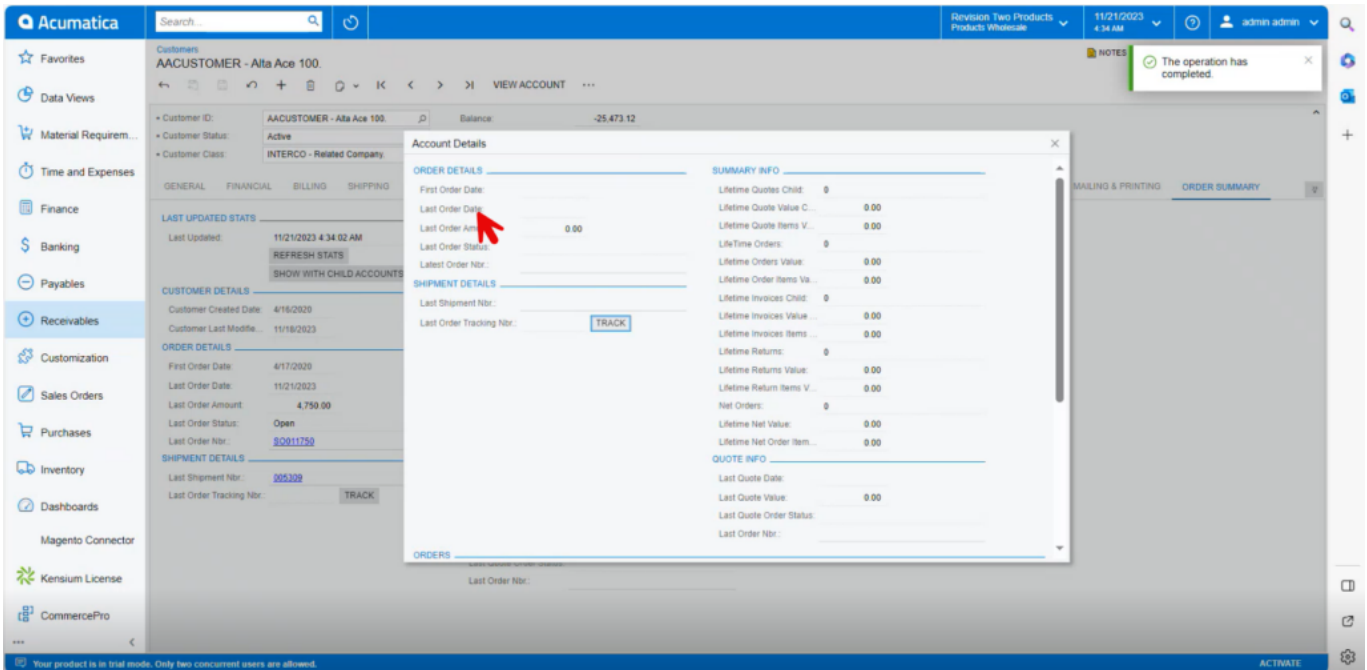
SUMMARY INFO  
Lifetime Quotes: 0.00  
Lifetime Quote Value: 0.00  
Lifetime Orders: 397  
Lifetime Orders Value: 6,520,235.07  
Lifetime Order Items Value: 6,493,597.65  
Lifetime Invoices: 97  
Lifetime Invoices Value: 2,150,219.65  
Lifetime Invoices Items Value: 2,150,219.65  
Lifetime Returns: 0  
Lifetime Returns Value: 0.00  
Lifetime Returns Items Value: 0.00  
Net Orders: 397  
Lifetime Net Value: 6,520,235.07  
Lifetime Net Order Items Value: 6,493,597.65

QUOTE INFO  
Last Quote Date: 0.00  
Last Quote Value: 0.00  
Last Quote Order Status:  
Last Order Nbr.:

## Customers (2)

1. You can see **[Order details]**, **[shipment details]**, **[Summary info]** and **[track]** of the ordered items.



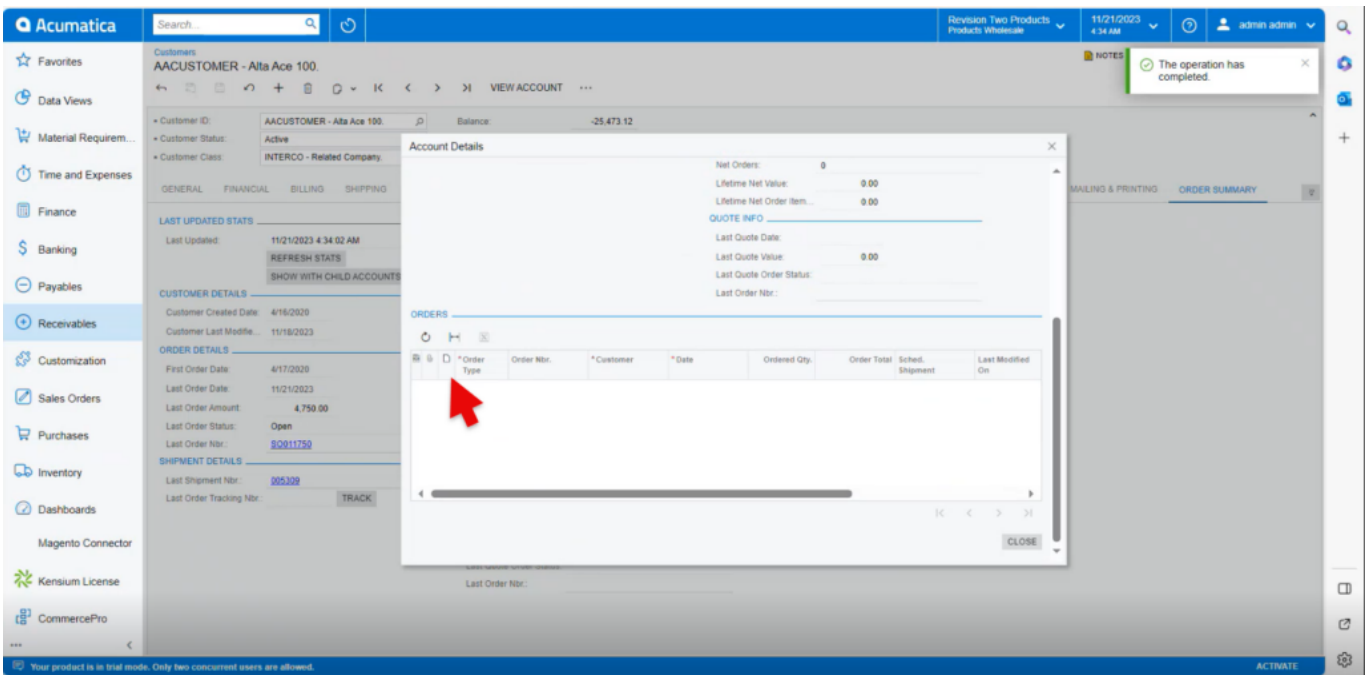


The screenshot shows the Acumatica interface with the 'Account Details' window open for customer 'AACUSTOMER - Alta Ace 100'. The window is divided into several sections:

- ORDER DETAILS:**
  - First Order Date: [Empty]
  - Last Order Date: [Empty]
  - Last Order Amount: 0.00
  - Last Order Status: [Empty]
  - Last Order Nbr.: [Empty]
- SHIPMENT DETAILS:**
  - Last Shipment Nbr.: [Empty]
  - Last Order Tracking Nbr.: [Empty] (with a TRACK button)
- SUMMARY INFO:**
  - Lifetime Quotes Child: 0
  - Lifetime Quote Value C: 0.00
  - Lifetime Quote Items V: 0.00
  - Lifetime Orders: 0
  - Lifetime Order Value: 0.00
  - Lifetime Order Items Va: 0.00
  - Lifetime Invoices Child: 0
  - Lifetime Invoices Value: 0.00
  - Lifetime Invoices Items Va: 0.00
  - Lifetime Returns: 0
  - Lifetime Returns Value: 0.00
  - Lifetime Return Items V: 0.00
  - Net Orders: 0
  - Lifetime Net Value: 0.00
  - Lifetime Net Order Item: 0.00
- QUOTE INFO:**
  - Last Quote Date: [Empty]
  - Last Quote Value: 0.00
  - Last Quote Order Status: [Empty]
  - Last Order Nbr.: [Empty]

A red arrow points to the 'Last Order Amount' field.

### Child Item Details



This screenshot shows the same 'Account Details' window, but with the 'ORDERS' section expanded to show a table of orders. A red arrow points to the first row of the table.

Order Type	Order Nbr.	* Customer	* Date	Ordered Qty.	Order Total	Sched. Shipment	Last Modified On
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]

The table is currently empty, and a red arrow points to the first row.

Child Item Details (1)

