


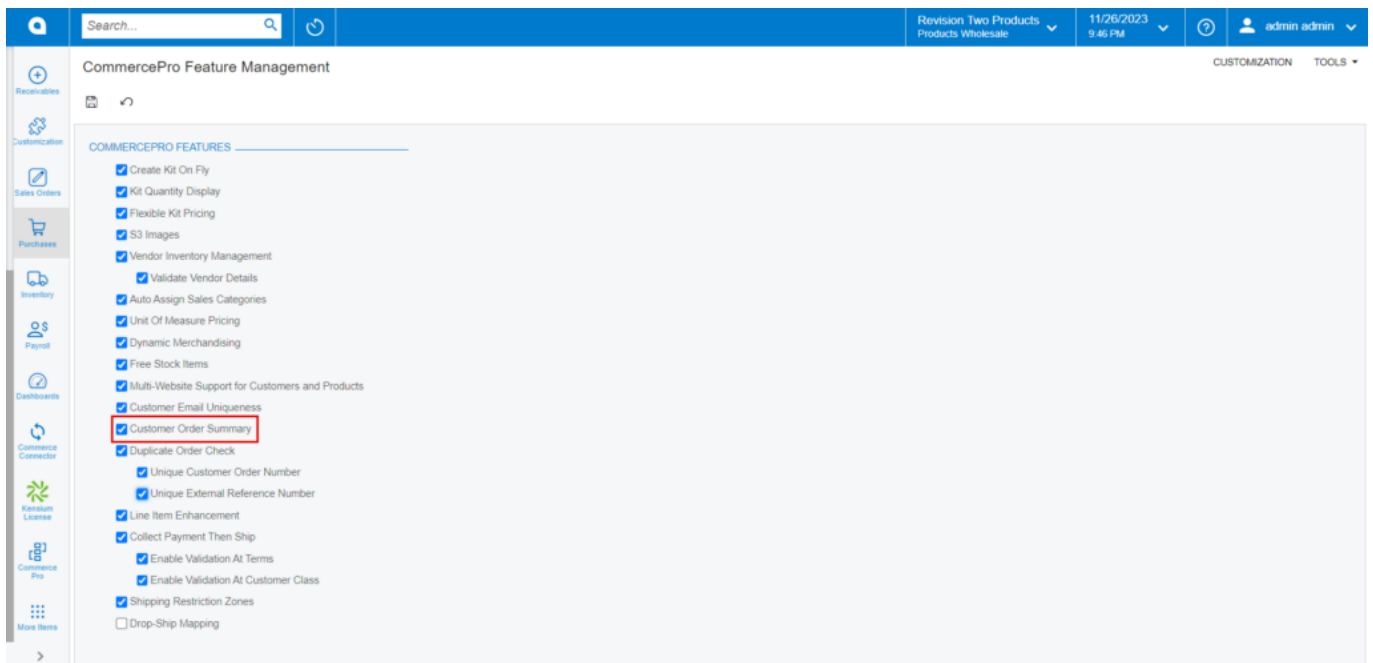
# Customer Order Summary

 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

Receivables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Commerce Connector

Kensium License

Commerce Pro

More Items

MENU ITEMS (6)

TRANSACTIONS AND PROFILES

HELP TOPICS

FILES

Receivables

Processes

Customer Order Summary

Process Customer Order Sum...

Preferences

Customer Order Summary

Commerce Pro

Processes

Customer Order Summary

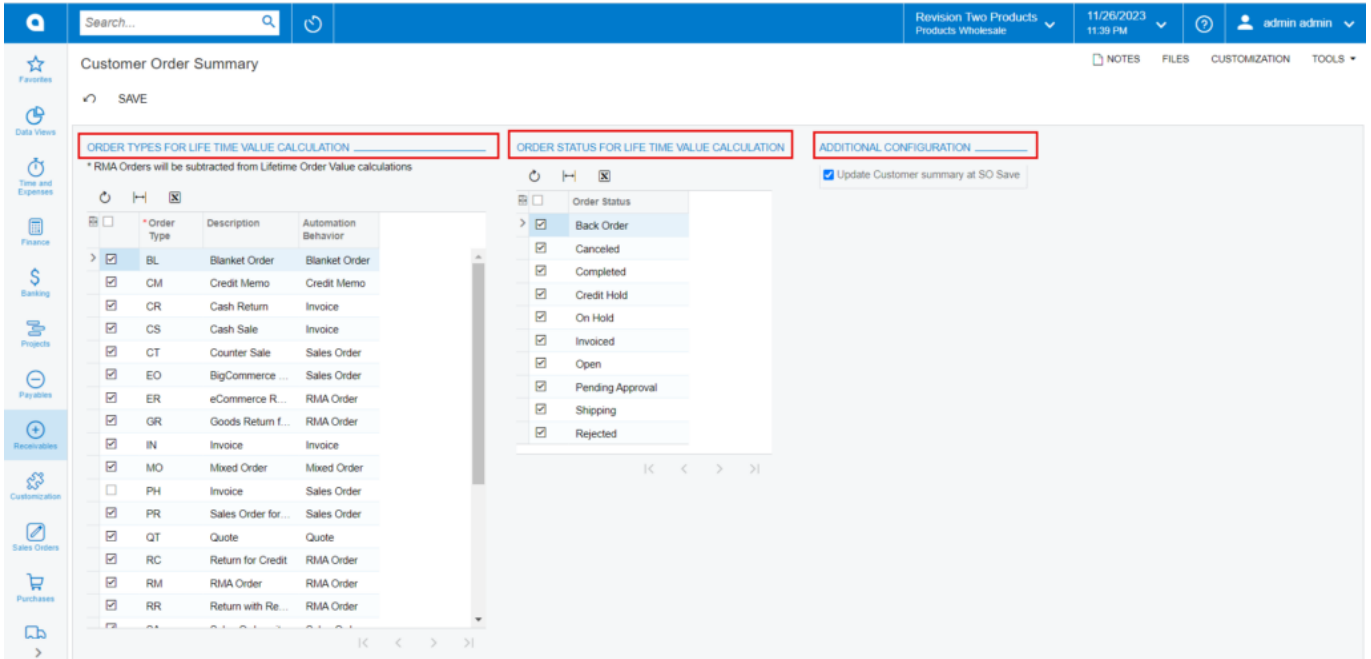
Process Customer Order Sum...

Preferences

Customer Order Summary

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

**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

- Customers**
- Customer** Locations
- Customer** Payment Methods

Inquiries

- Customer** Details
- Customer** Summary
- Customer** Statement History
- Dunning Letter History by **Custo...**
- Discrepancy by **Customer**

Reports

- AR Balance by **Customer**
- AR Open Documents by **Custo...**
- AR Balance by **Customer** MC
- Customer** Summary
- Customer** Profiles

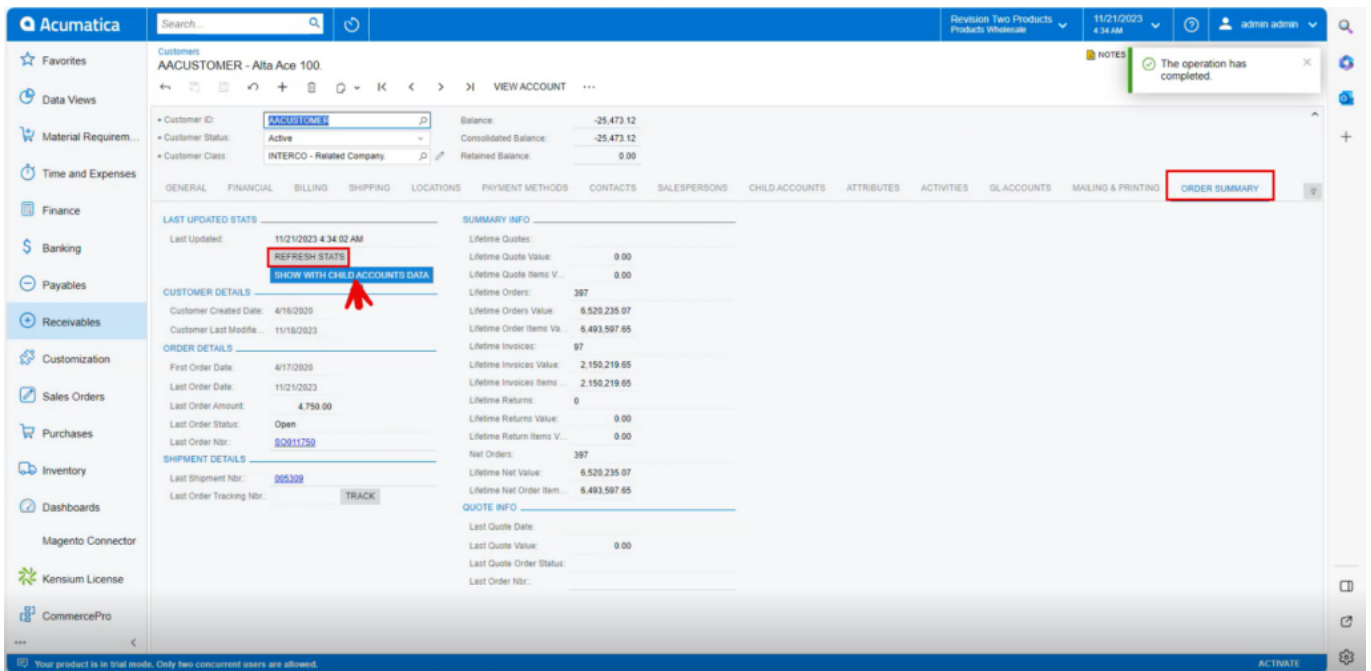
Profitability Analysis

- Sales Profitability by Salesperso...
- Sales Profitability by **Customer** ...
- Sales Profitability by **Customer** ...

Preferences

## Customers

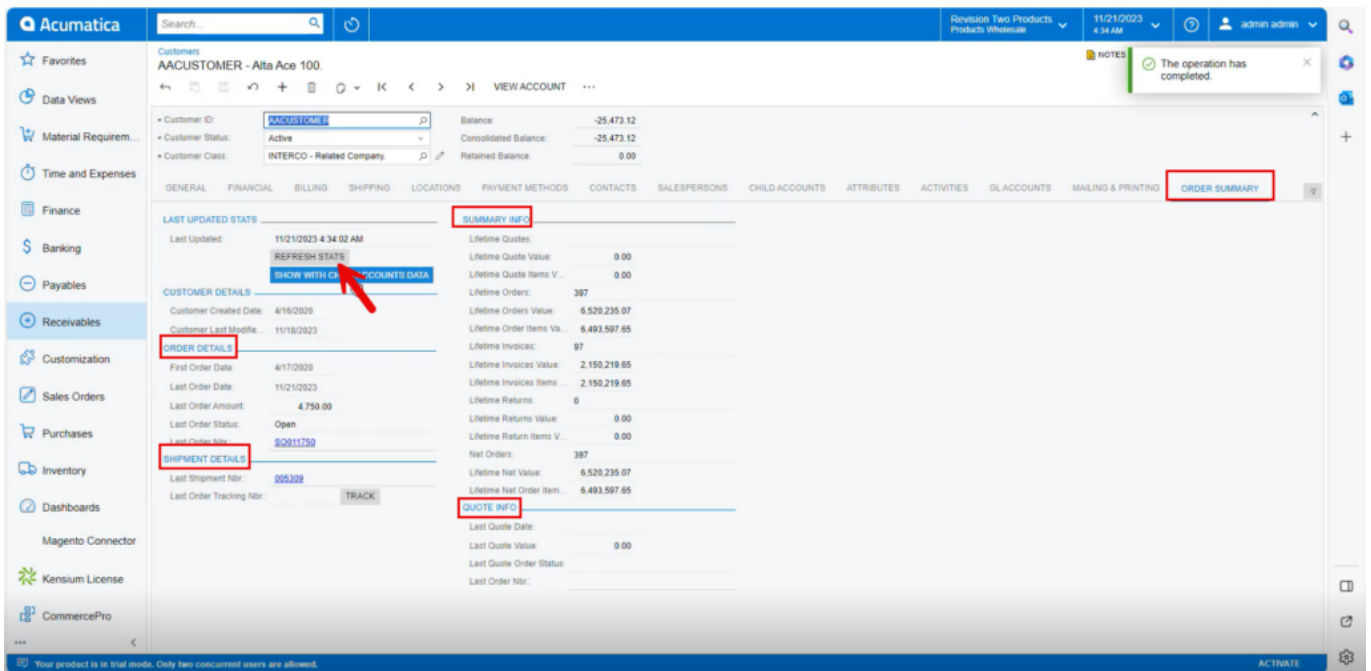
1. Click on **[ORDER SUMMARY]**.



The screenshot shows the Acumatica CommercePro interface for a customer named AACUSTOMER - Alta Ace 100. The interface is divided into a sidebar on the left and a main content area. The sidebar contains various navigation options including Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, and Dashboards. The main content area displays customer information, order details, and shipment details. A red box highlights the 'ORDER SUMMARY' tab, and a red arrow points to the 'REFRESH STATS' button. The interface also shows a 'LAST UPDATED STATS' section with a 'REFRESH STATS' button and a 'SHOW WITH CHILD ACCOUNTS DATA' button. The 'CUSTOMER DETAILS' section shows the customer's creation date and last modification date. The 'ORDER DETAILS' section shows the first order date, last order date, and last order amount. The 'SHIPMENT DETAILS' section shows the last shipment number and last order tracking number. The 'SUMMARY INFO' section shows various financial metrics such as Lifetime Quotes, Lifetime Orders, Lifetime Invoices, and Lifetime Returns. The 'QUOTE INFO' section shows the last quote date, last quote value, and last quote order status.

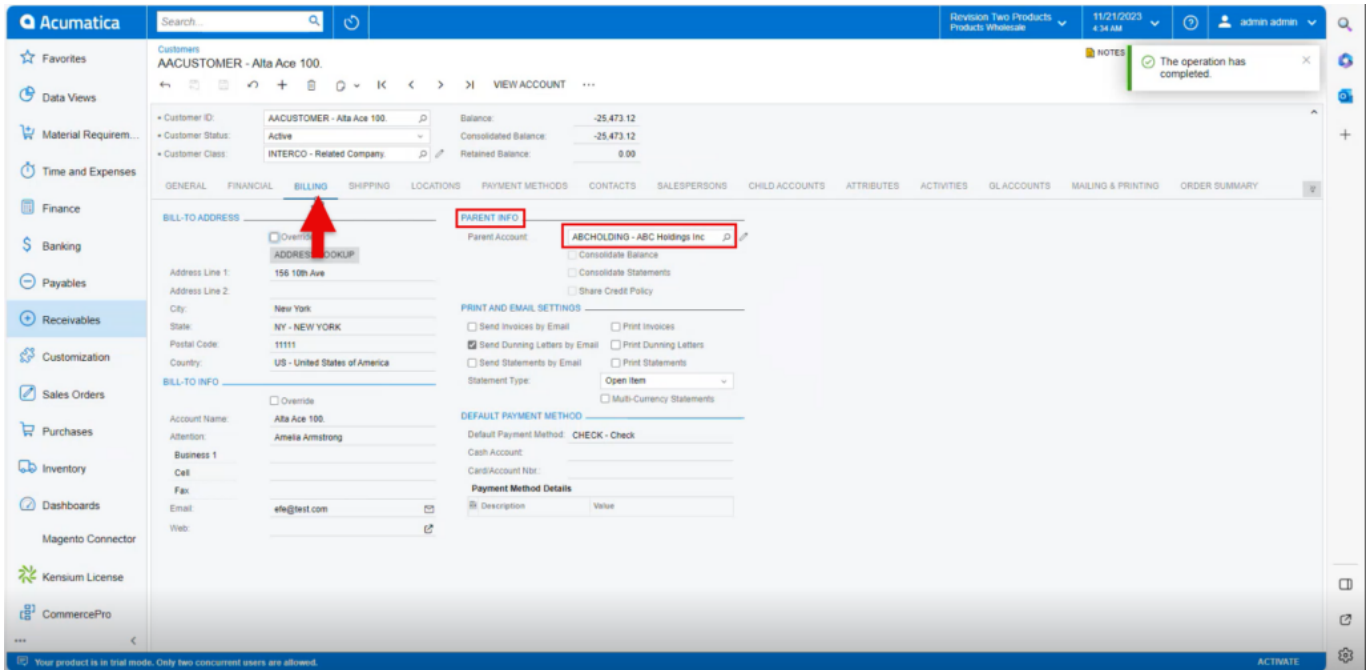
## Customers (1)

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 LOOKUP  
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: ela@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:  ☐ Multi-Currency Statements

**DEFAULT PAYMENT METHOD**

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

Description	Value
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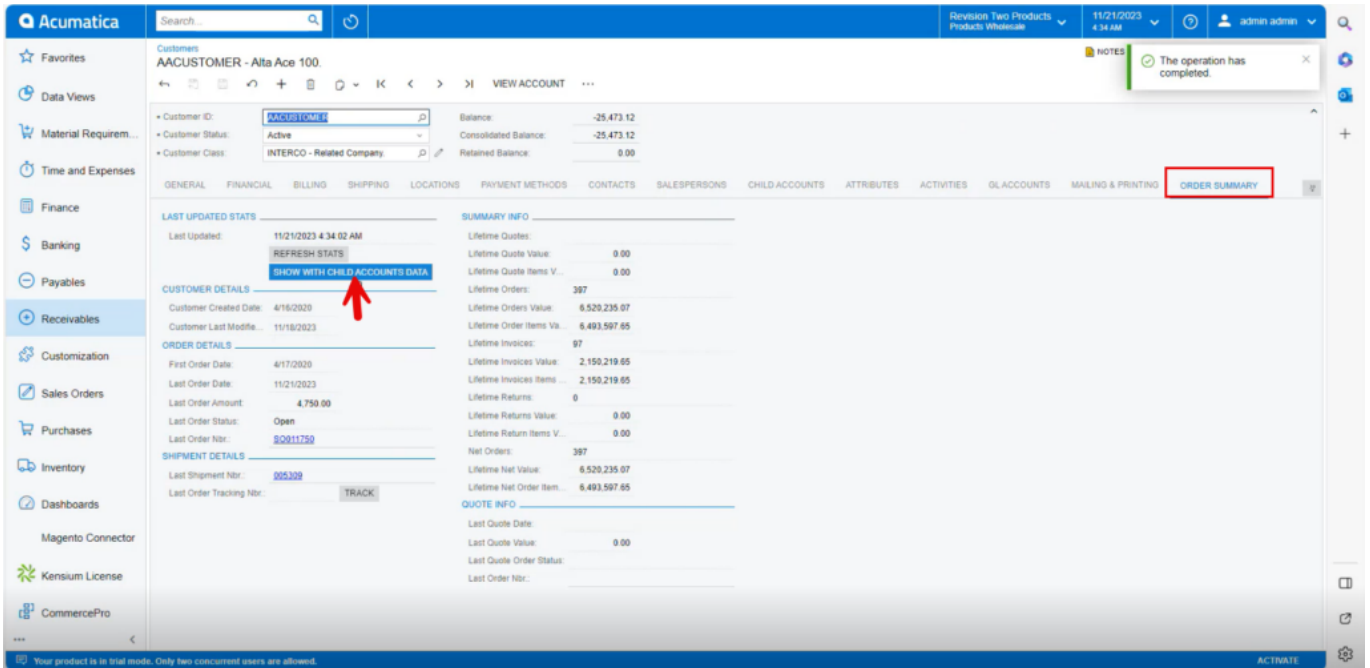
NOTES: The operation has completed.

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

Your product is in trial mode. Only two concurrent 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  
Customer Status: Active  
Customer Class: INTERCO - Related Company

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**

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.: 80011750

SHIPMENT DETAILS  
Last Shipment Nbr.: 005309  
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: 8,493,597.65  
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 Return Items Value: 0.00  
Net Orders: 397  
Lifetime Net Value: 6,520,235.07  
Lifetime Net Order Items Value: 8,493,597.65

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

NOTES  
The operation has completed.

Your product is in trial mode. Only non-consultant users are allowed.

ACTIVATE

## Customers (2)

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



Acumatica

Customers  
AACUSTOMER - Alta Ace 100

Balance: -25,473.12

Customer ID: AACUSTOMER - Alta Ace 100  
Customer Status: Active  
Customer Class: INTERCO - Related Company

GENERAL FINANCIAL BILLING SHIPPING

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

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

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: 80011750

SHIPMENT DETAILS  
Last Shipment Nbr: 005309  
Last Order Tracking Nbr: TRACK

Account Details

ORDER DETAILS

First Order Date:  
Last Order Date:  
Last Order Amount: 0.00  
Last Order Status:  
Latest Order Nbr:  
Last Shipment Nbr:  
Last Order Tracking Nbr: TRACK

SUMMARY INFO

Lifetime Quotes Child: 0  
Lifetime Quote Value C: 0.00  
Lifetime Quote Items V: 0.00  
Lifetime Orders: 0  
Lifetime Orders Value: 0.00  
Lifetime Order Items Va: 0.00  
Lifetime Invoices Child: 0  
Lifetime Invoices Value: 0.00  
Lifetime Invoice Items V: 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:  
Last Quote Value: 0.00  
Last Quote Order Status:  
Last Order Nbr:

MAILING & PRINTING ORDER SUMMARY

ORDERS

Last Order Nbr:

Notes: The operation has completed.

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVATE

## Child Item Details

Acumatica

Customers  
AACUSTOMER - Alta Ace 100

Balance: -25,473.12

Customer ID: AACUSTOMER - Alta Ace 100  
Customer Status: Active  
Customer Class: INTERCO - Related Company

GENERAL FINANCIAL BILLING SHIPPING

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

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

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: 80011750

SHIPMENT DETAILS  
Last Shipment Nbr: 005309  
Last Order Tracking Nbr: TRACK

Account Details

Net Orders: 0  
Lifetime Net Value: 0.00  
Lifetime Net Order Item: 0.00  
QUOTE INFO  
Last Quote Date:  
Last Quote Value: 0.00  
Last Quote Order Status:  
Last Order Nbr:

ORDERS

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

Notes: The operation has completed.

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVATE

Child Item Details (1)

