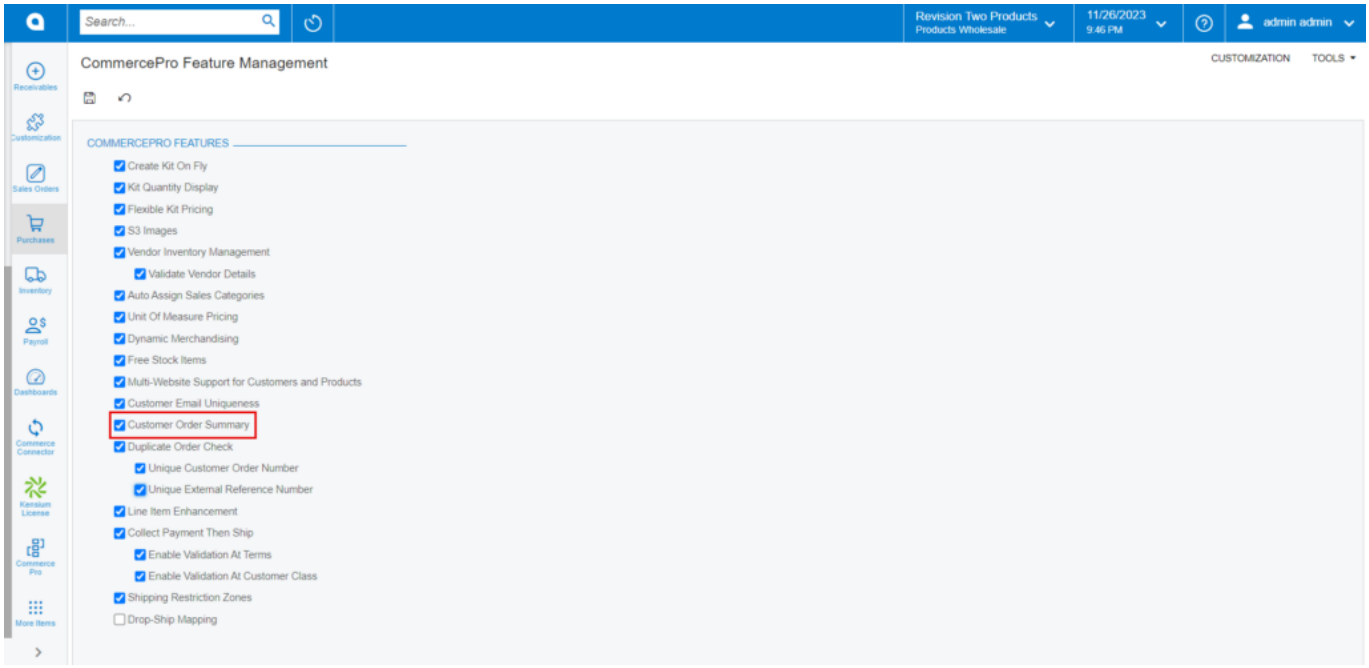
Customer Order Summary

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.

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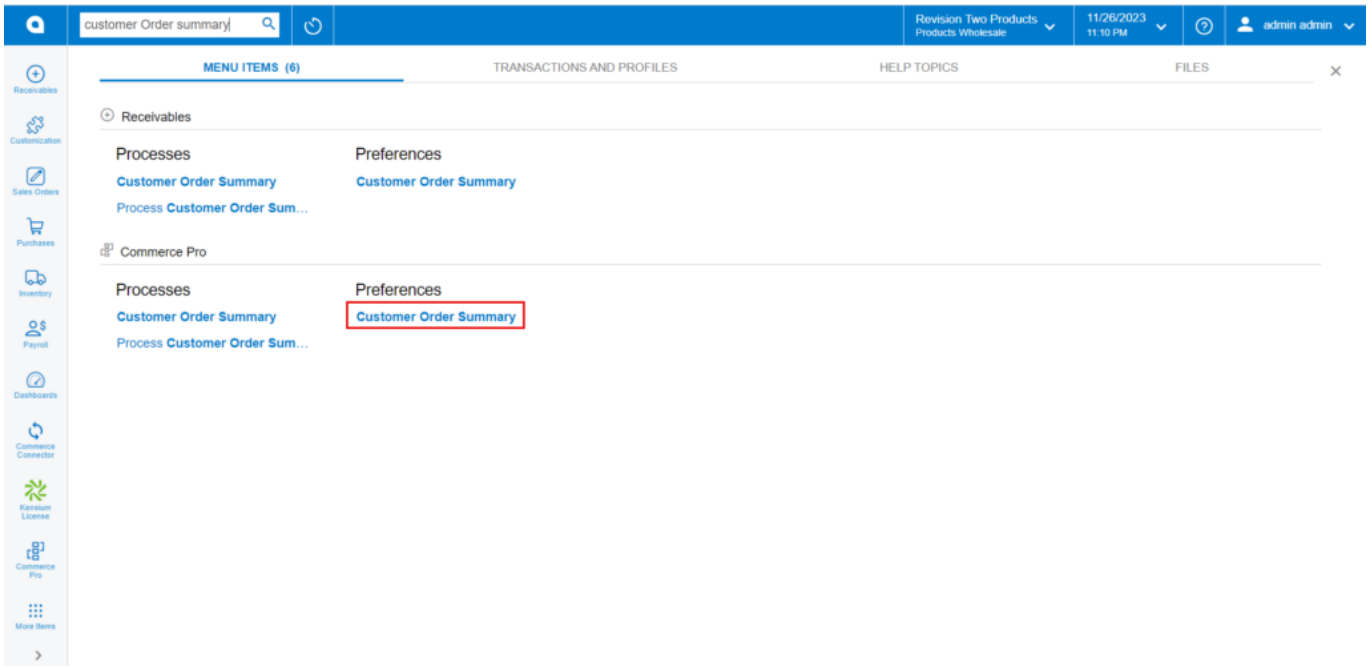

Customer Order Summary

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

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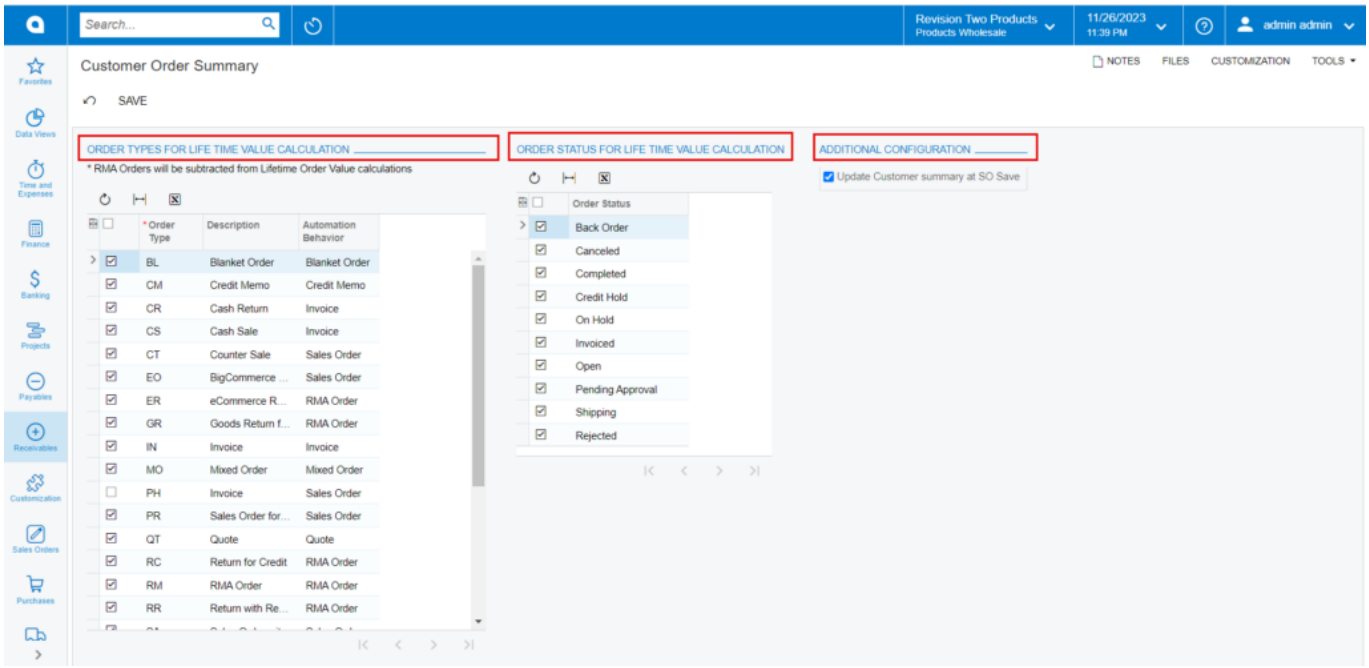

Customer Order Summary (1)

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.
2. **Order Status for Lifetime value Calculation:** The status of the sales orders depends on the enabled radio button in **[Order Status].**
3. **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.
4. You need to navigate to **[Customers]** under **[Profiles]** then check for the Order Summary Details for a particular customer.

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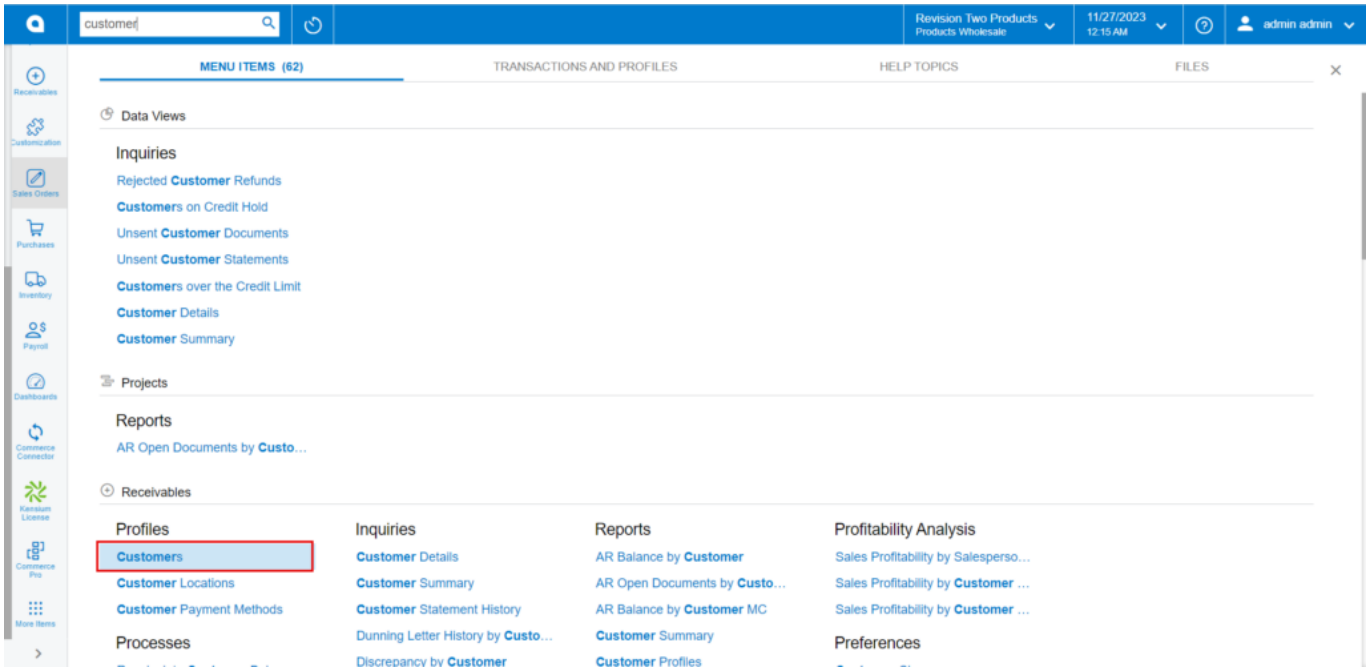

Customers

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

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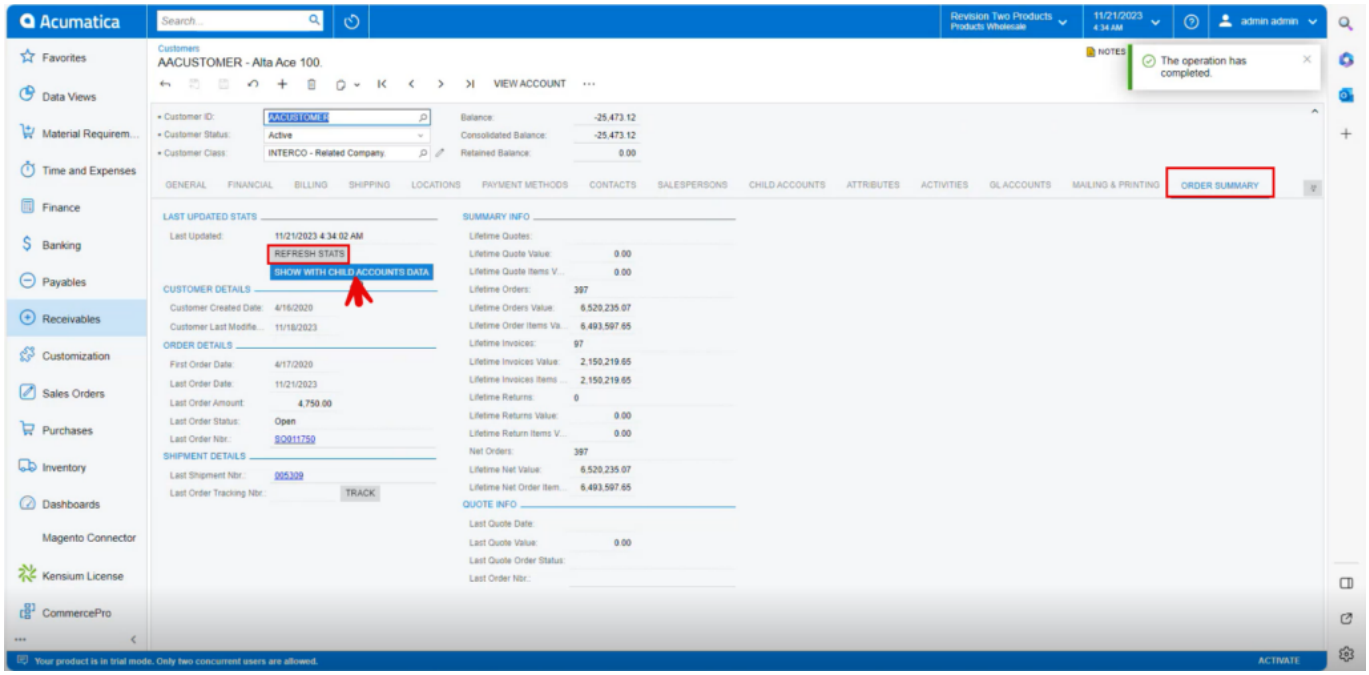

Customers (1)

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.

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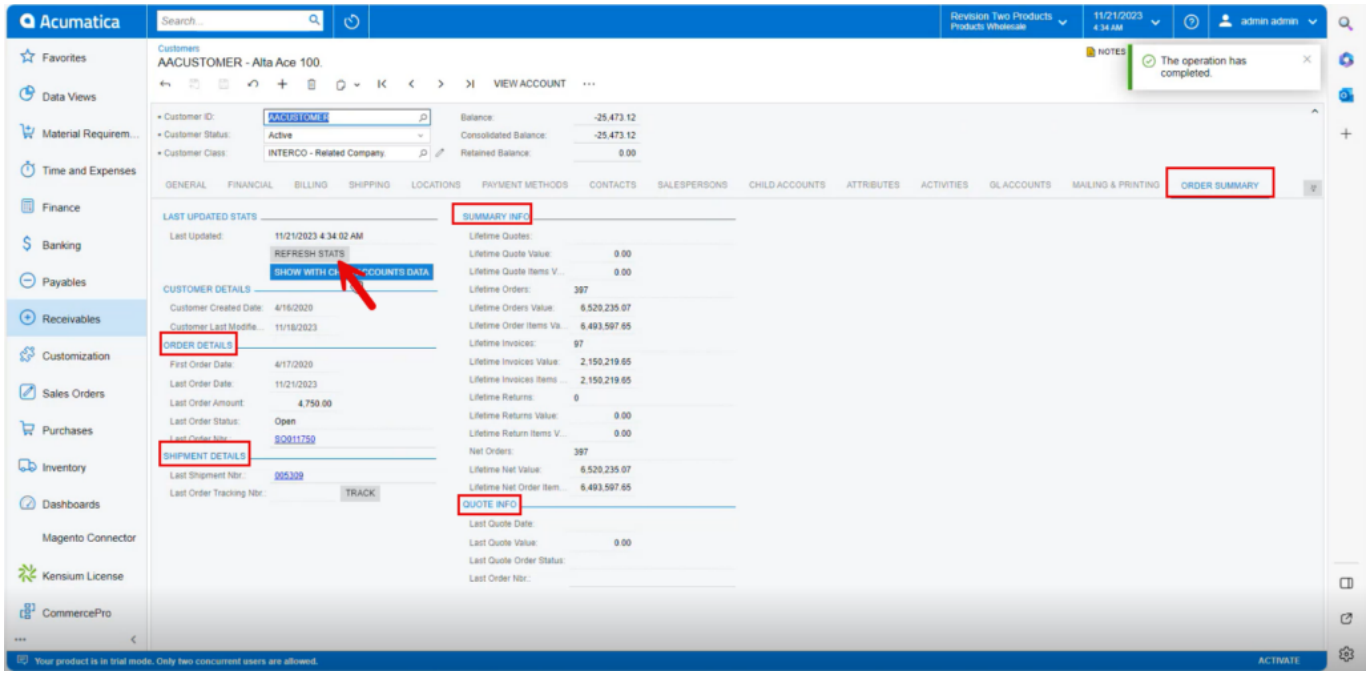

Refresh Status

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.

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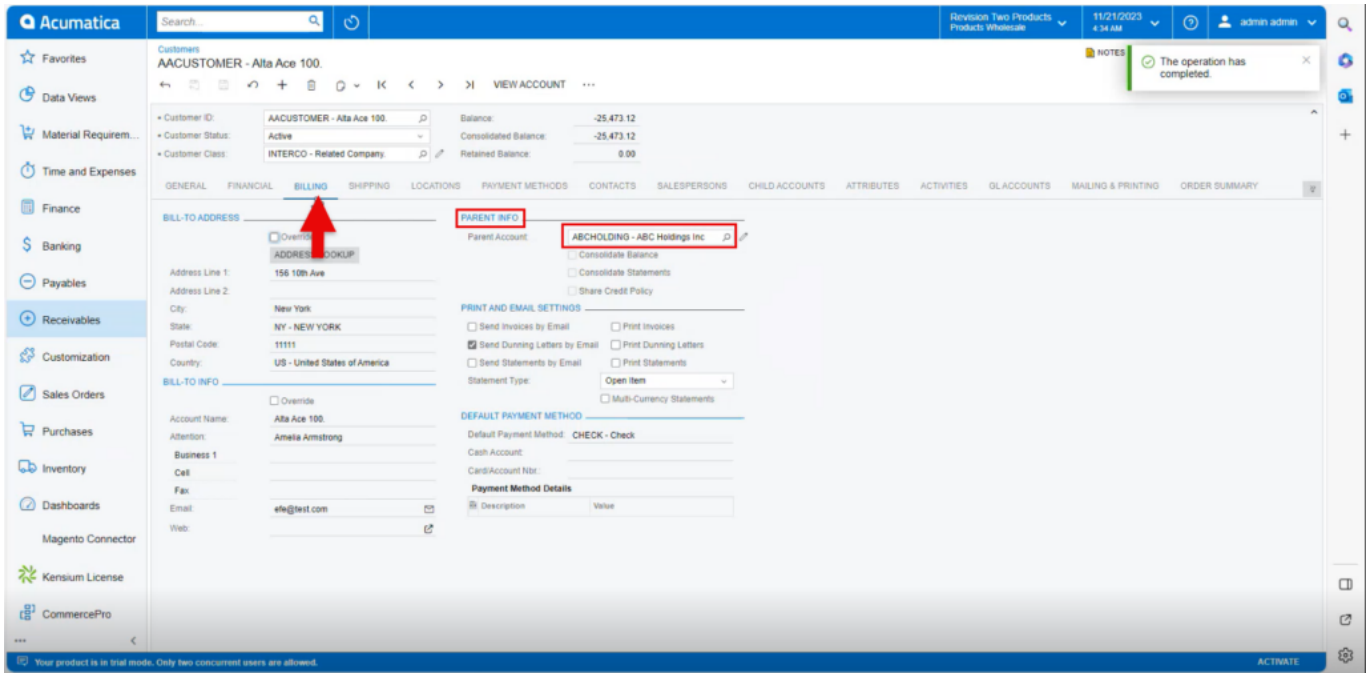

Parent Info

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.

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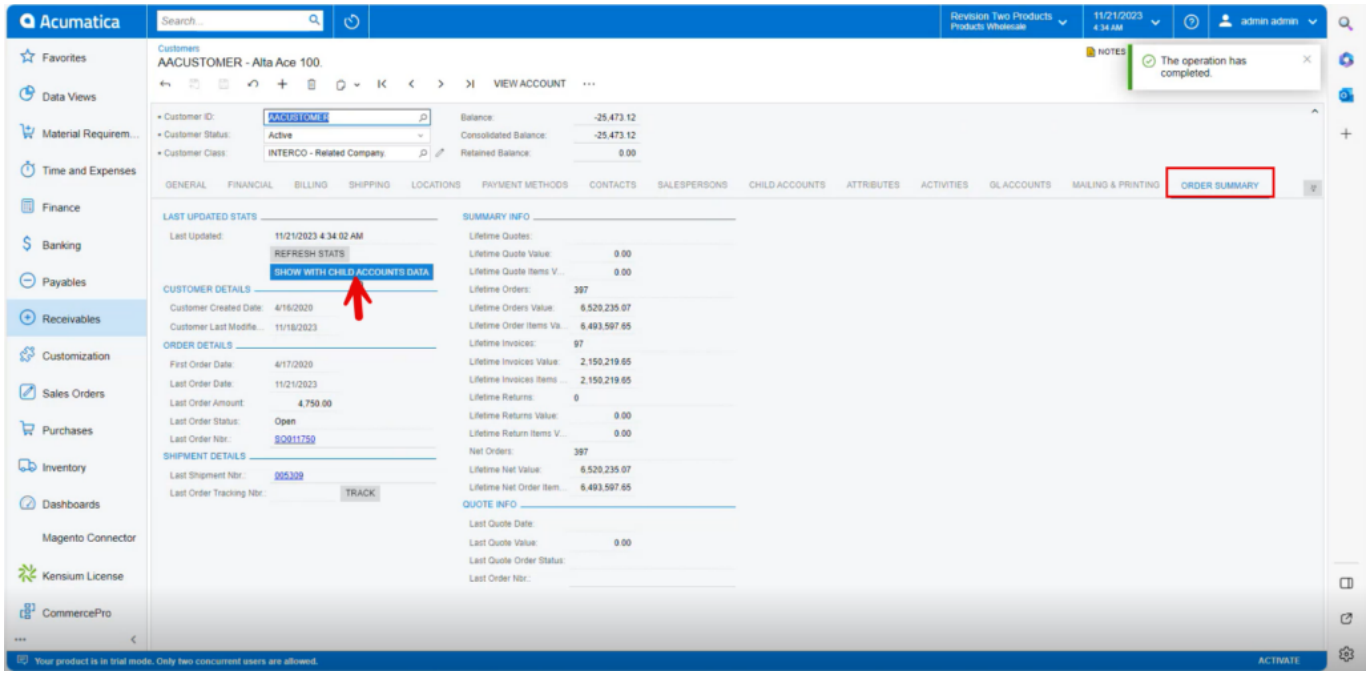

Customers (2)

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

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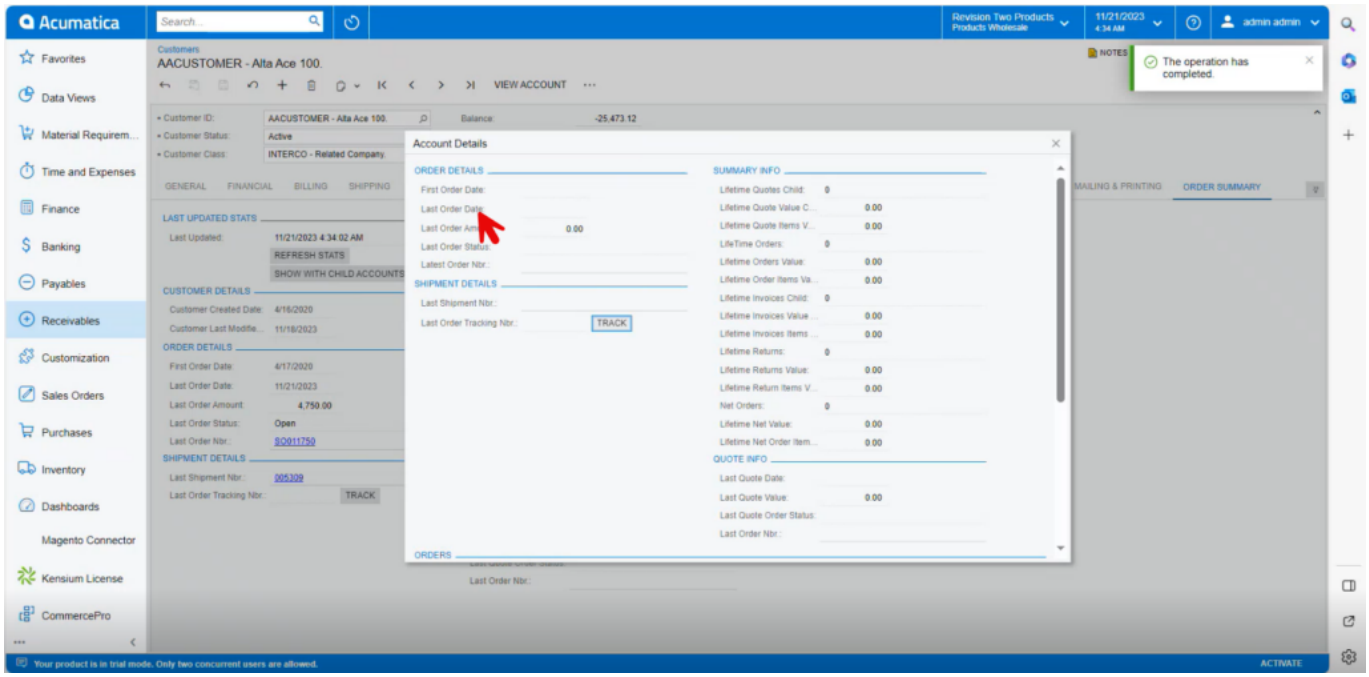
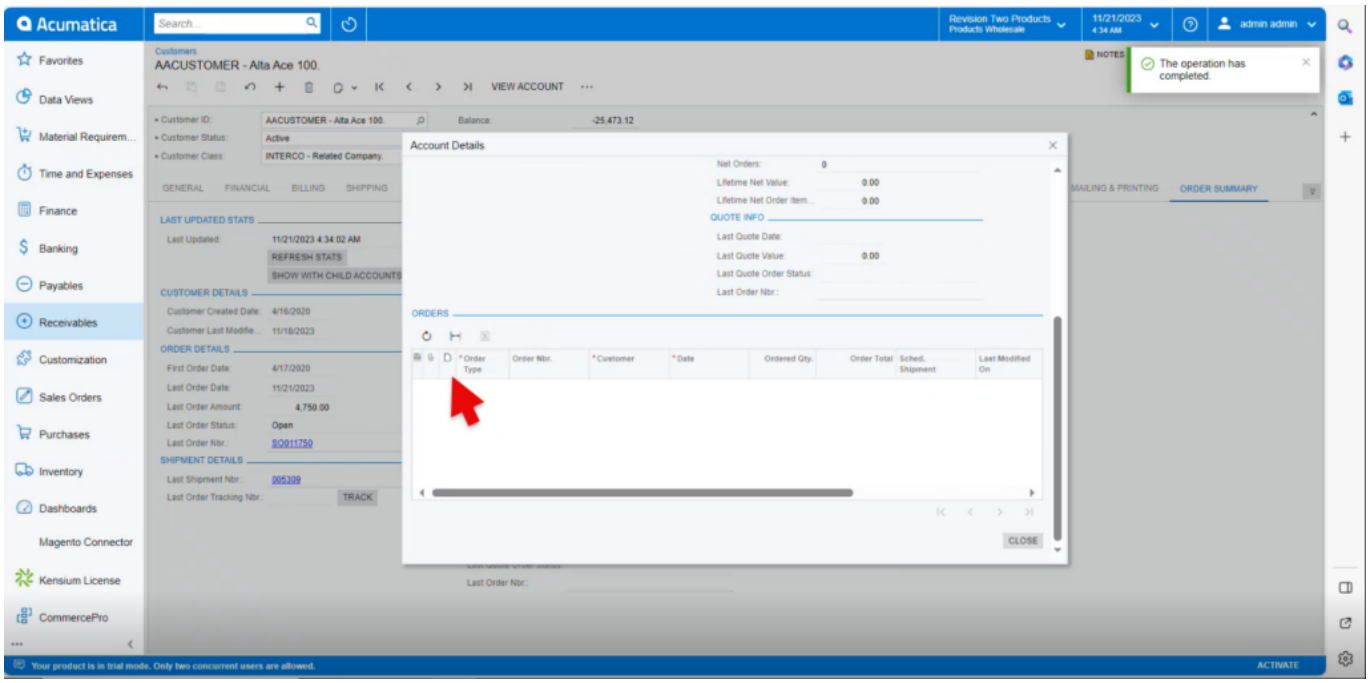


Child Item Details



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Child Item Details (1)

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