

# Customer Order Summary

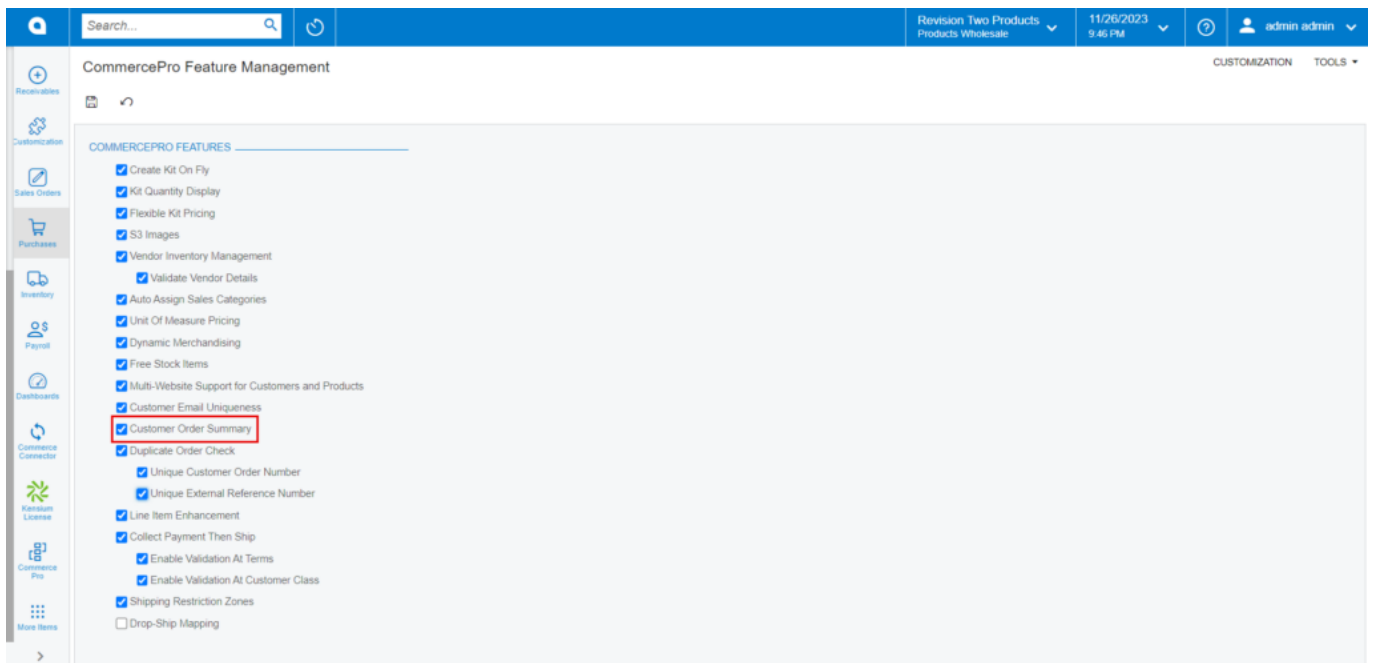


A snapshot of a customer's value and recent order details can now be viewed on the Order Summary tab. The Order Summary screen includes the shipment and tracking details, a lifetime order value summary, and last quote information.

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

Fusion 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

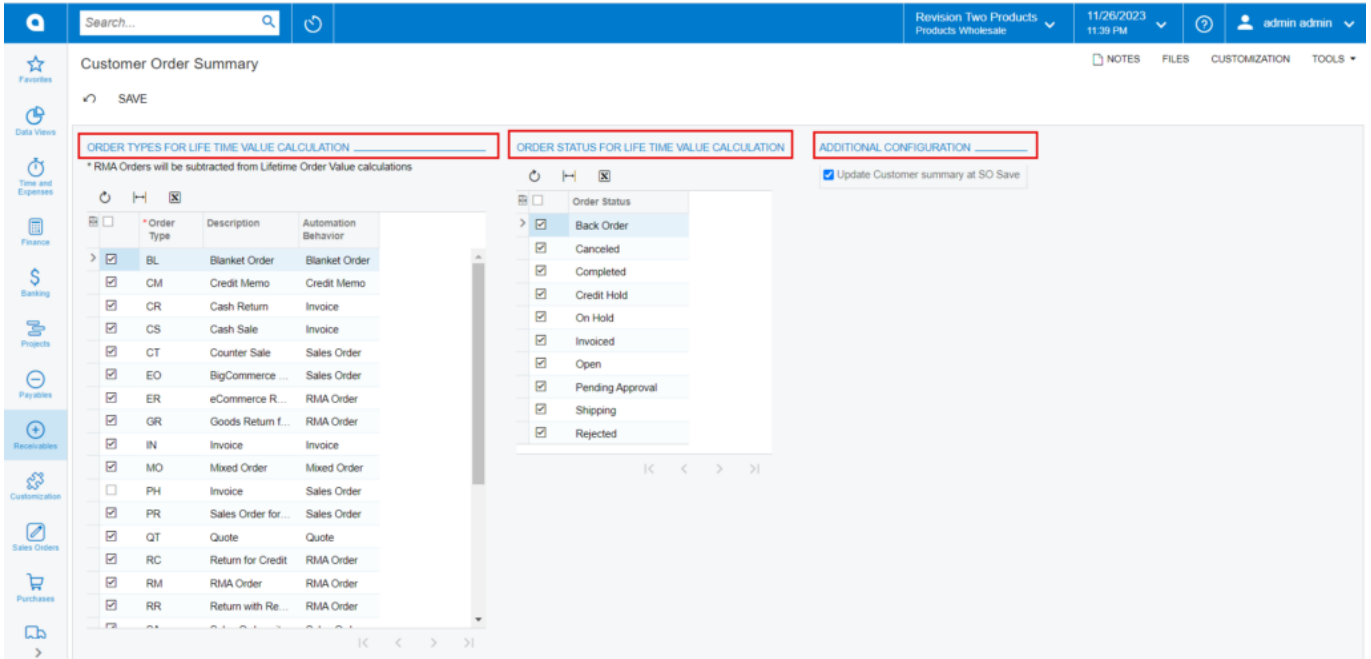
Process Customer Order Sum...

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

Receivables

Customization

Sales Orders

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Kamatum License

Commerce Pro

More Items

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

Processes

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 ...

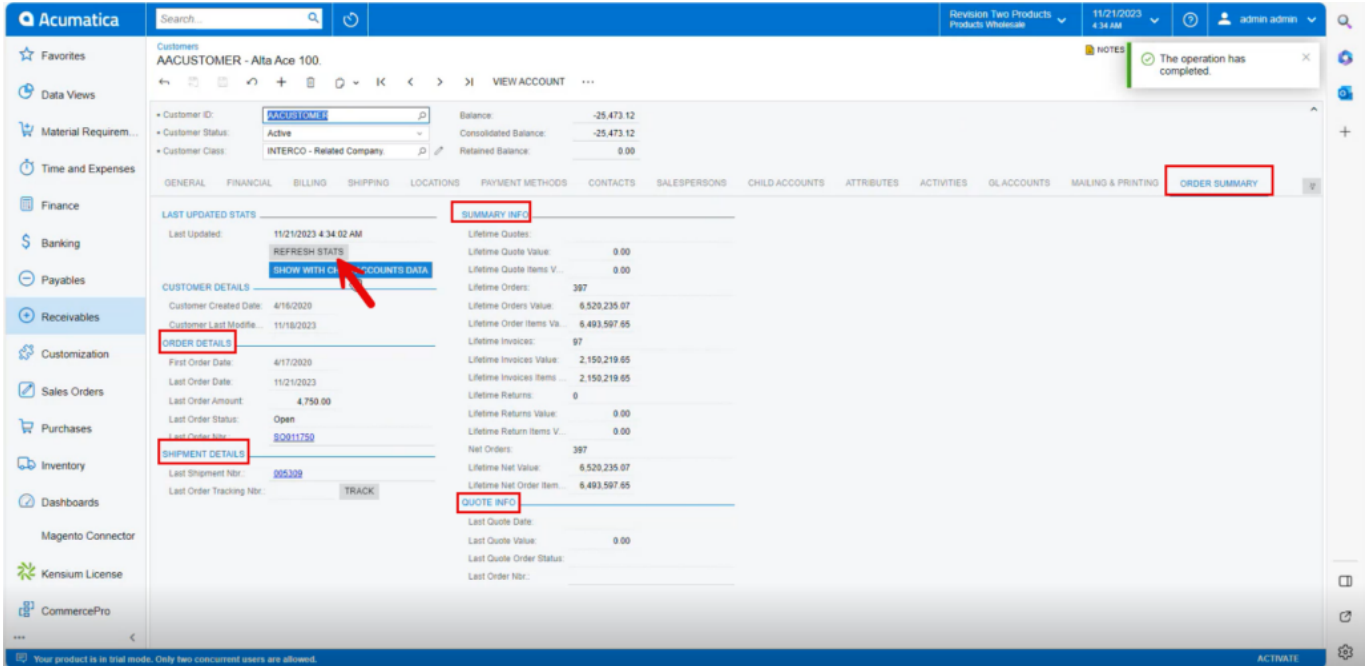
Preferences

## Customers

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

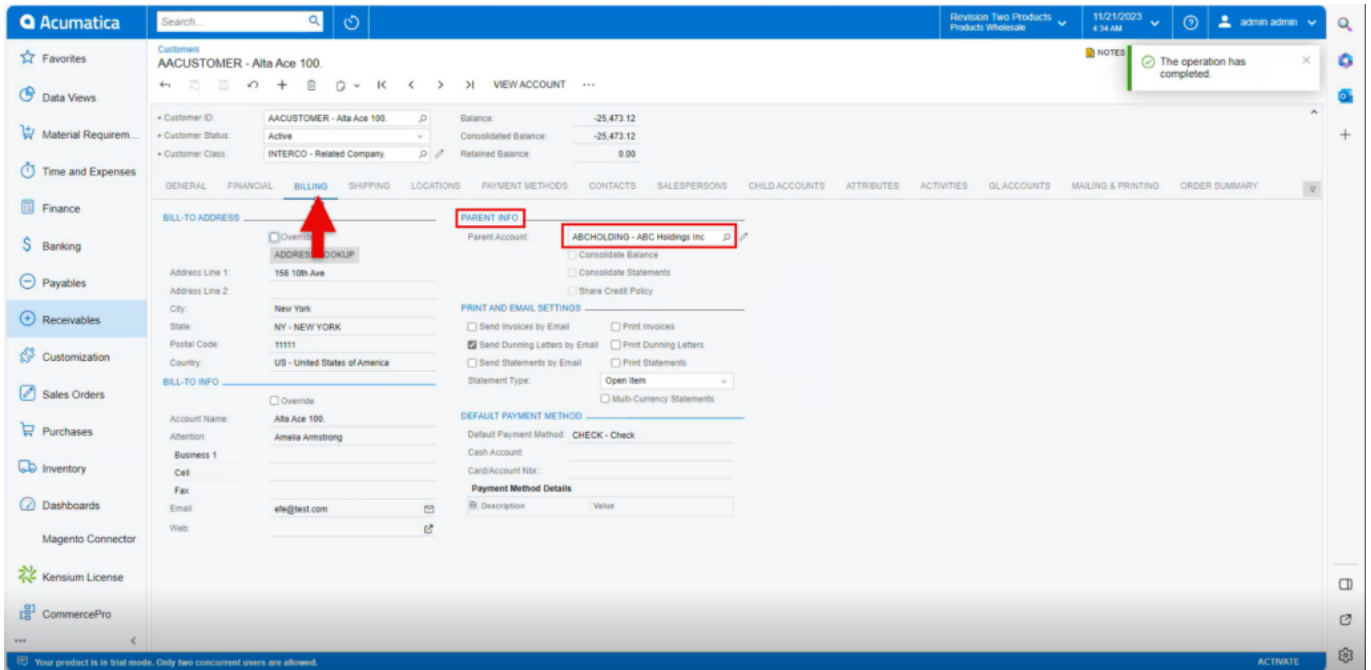
## Customers (1)

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

Search

Revision Two Products  
Products Wholesale

11/21/2023  
4:34 AM

admin admin

Customers  
AACUSTOMER - Alta Ace 100.

VIEW ACCOUNT

Customer ID: AACUSTOMER - Alta Ace 100. 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 GLACCOUNTS MAILING & PRINTING ORDER SUMMARY

BILL-TO ADDRESS

Override ADDRESS BOOKUP

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: Open Item  
Multi-Currency Statements

DEFAULT PAYMENT METHOD

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

NOTES

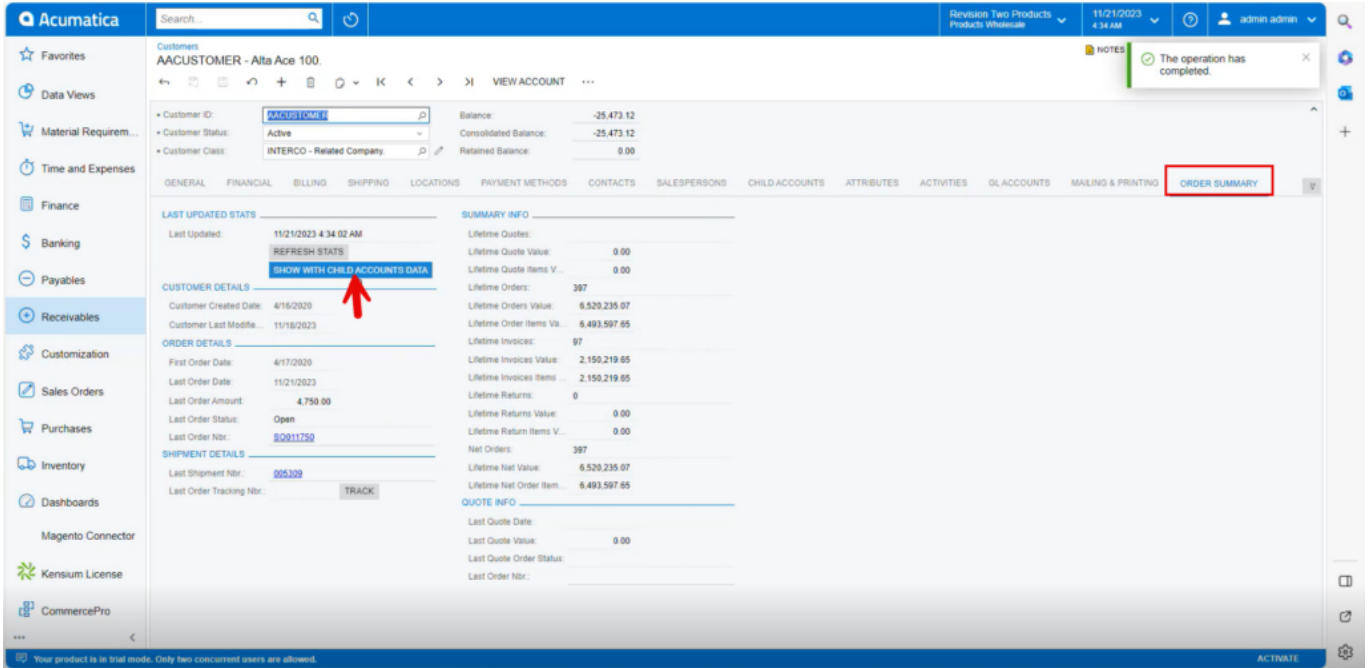
The operation has completed.

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.

VIEW ACCOUNT

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.: 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: 8,493,597.65

QUOTE INFO

Last Quote Date: 0.00

Last Quote Value: 0.00

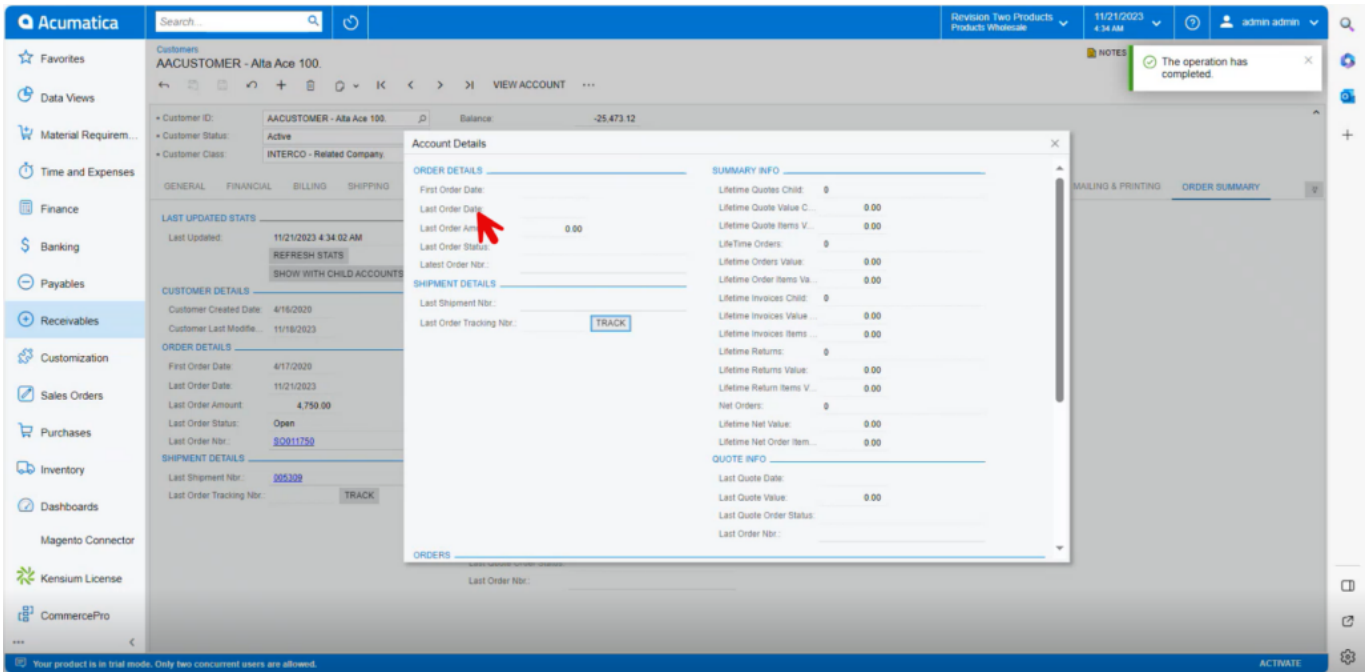
Last Quote Order Status: 0.00

Last Order Nbr.: 0.00

## Customers (2)

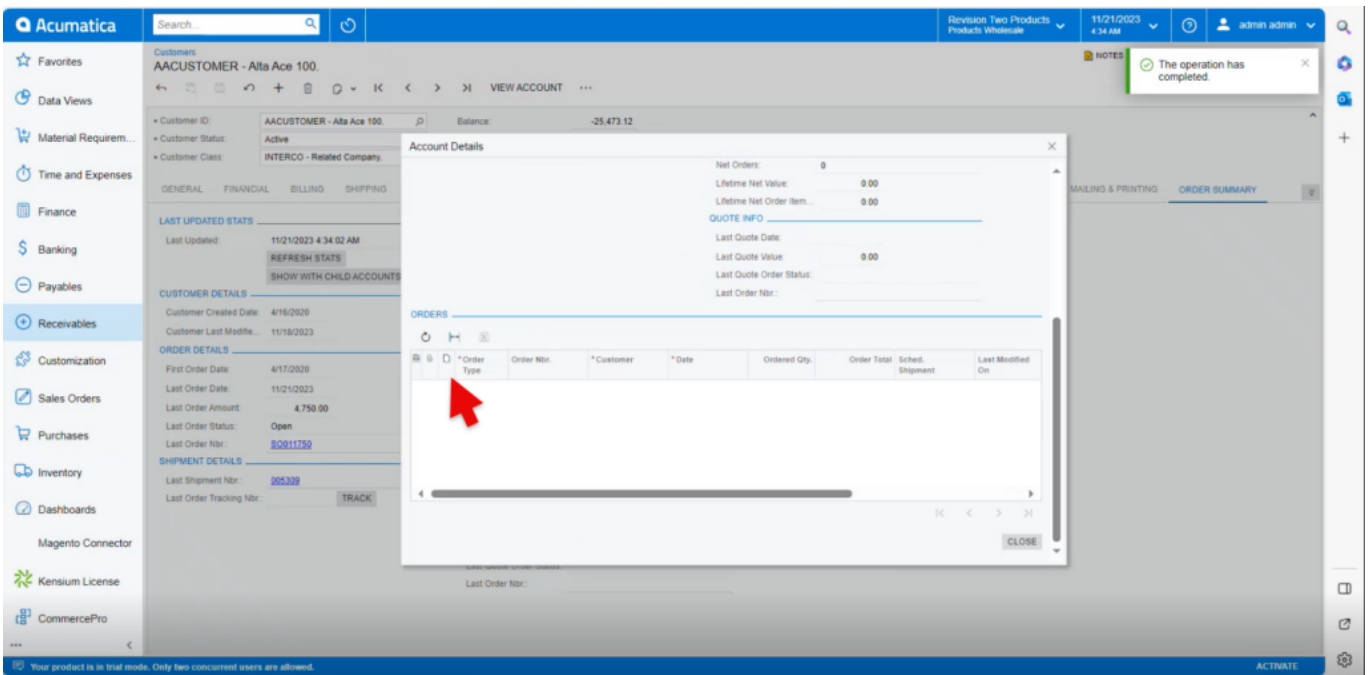
1. You can see **[Order details]**, **[shipment details]**, **[Summary info]** and **[track]** of the ordered items.





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', 'SHIPMENT DETAILS', 'SUMMARY INFO', and 'QUOTE INFO'. A red arrow points to the 'Last Order Date' field in the 'ORDER DETAILS' section, which displays '11/21/2023 4:34:02 AM'. The 'SHIPMENT DETAILS' section shows 'Last Shipment Nbr.' as '005309' and 'Last Order Tracking Nbr.' as '80011750'. The 'SUMMARY INFO' section displays various lifetime totals, all showing '0.00'. The 'QUOTE INFO' section shows 'Last Quote Date' as '11/21/2023 4:34:02 AM' and 'Last Quote Value' as '0.00'. A 'TRACK' button is visible next to the 'Last Order Tracking Nbr.' field.

## Child Item Details



This screenshot shows the 'Account Details' window for the same customer, but with the 'ORDERS' tab selected. A red arrow points to the 'ORDERS' tab. The 'ORDERS' section displays a table with columns: 'Order Type', 'Order Nbr.', 'Customer', 'Date', 'Ordered Qty.', 'Order Total', 'Sched. Shipment', and 'Last Modified On'. The table is currently empty. The 'SUMMARY INFO' and 'QUOTE INFO' sections are also visible, showing the same data as in the previous screenshot.

Child Item Details (1)

