TD SYNNEX

StreamOne Ion
Unified Customer Management - Orders

UCM Enhancements
Vendor Agnostic

StreamOne Ion
Flattening Enhancements

Orders
- User Experience
- Orders List Page
- Orders Details Page

TD SYNNEX

Orders
A new User Experience

The Orders List page offers a comprehensive list of all orders across all Customers.

It empowers the Reseller to efficiently oversee and administer these orders, ensuring seamless management and streamlined customer service.

Orders
Orders List Page

1 Search

You can refine your results in the orders inventory by searching for orders of interest. You can **search** for most of the columns in the page:
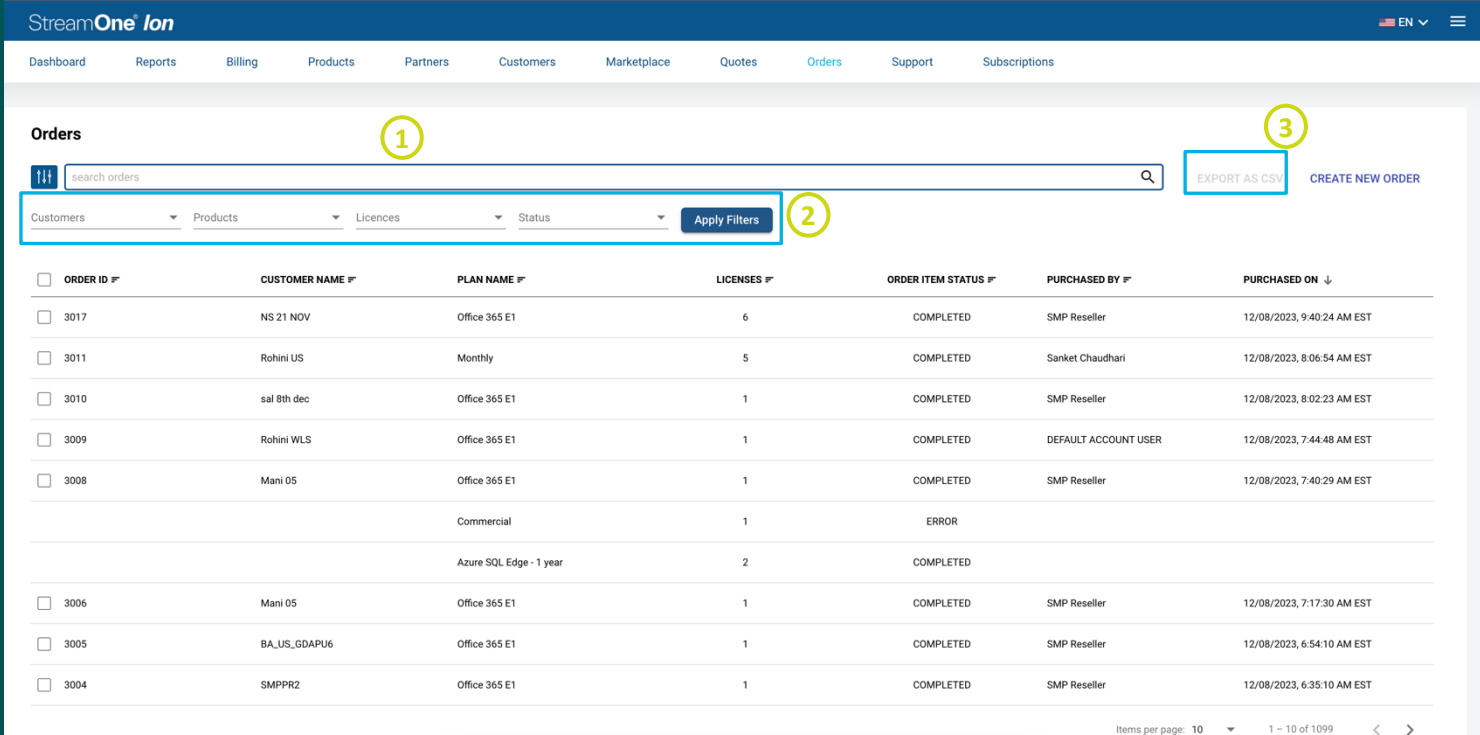
- ✓ Customer Name
- ✓ Plan Name
- ✓ Order ID
- ✓ Order Status
- ✓ Licenses (number)
- ✓ Purchased By

2 Filters

You can **filter** the customer list based on:

- ✓ Customers (Customer Name)
- ✓ Products
- ✓ Licenses
- ✓ Order Status

Each filter works in conjunction with other filters, so you can narrow down results by using more than one at the same time. To facilitate the selection of one or multiple options within each filter, specially when the list of possible selections is long, **each filter features its own search bar.**

3 Export

Select one or more Orders, and you can **download** a .CSV document with the same data points you have on the screen, so you can work with them outside the platform if needed.
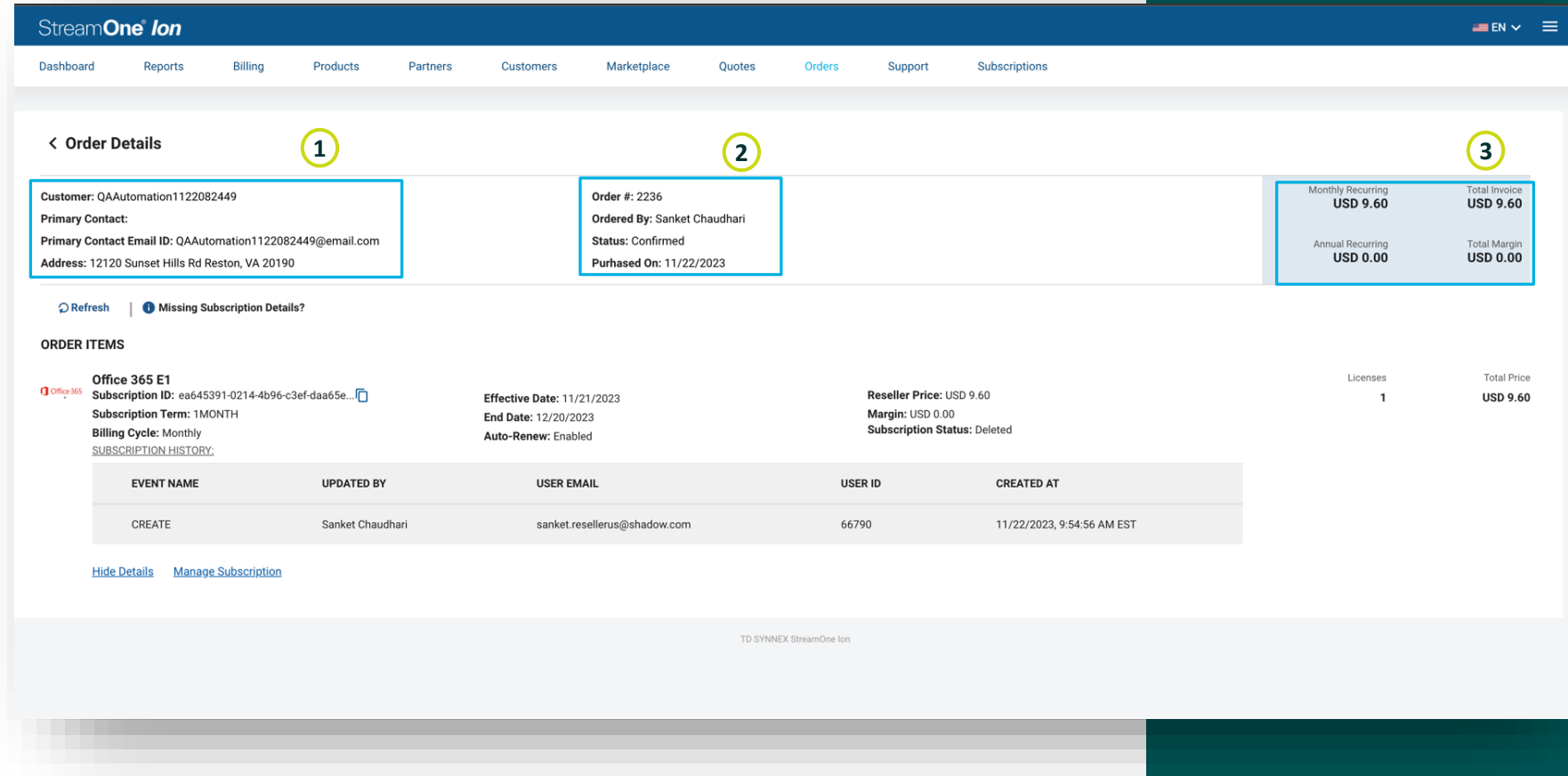
Orders
Orders Details Page

When double-clicking on an Order in the list page, you will be brought to the Order Details page:

1 **Customer/Partner Information**

Here you can see the details of the Customer for whom the order was placed. It includes information such as Name, Primary Contact, Primary Contact Email ID, Address.

2 **Order Information**

These are the details about the order, including Order #, or Order ID (StreamOne-Ion-generated ID), the user who placed the order, order status and date and time when the order was placed.

3 **Pricing Summary**

The blue box captures pricing details such as Total Price and Total Margin of the Reseller, and breakdown of the price based on Monthly and Annual Recurring charges.
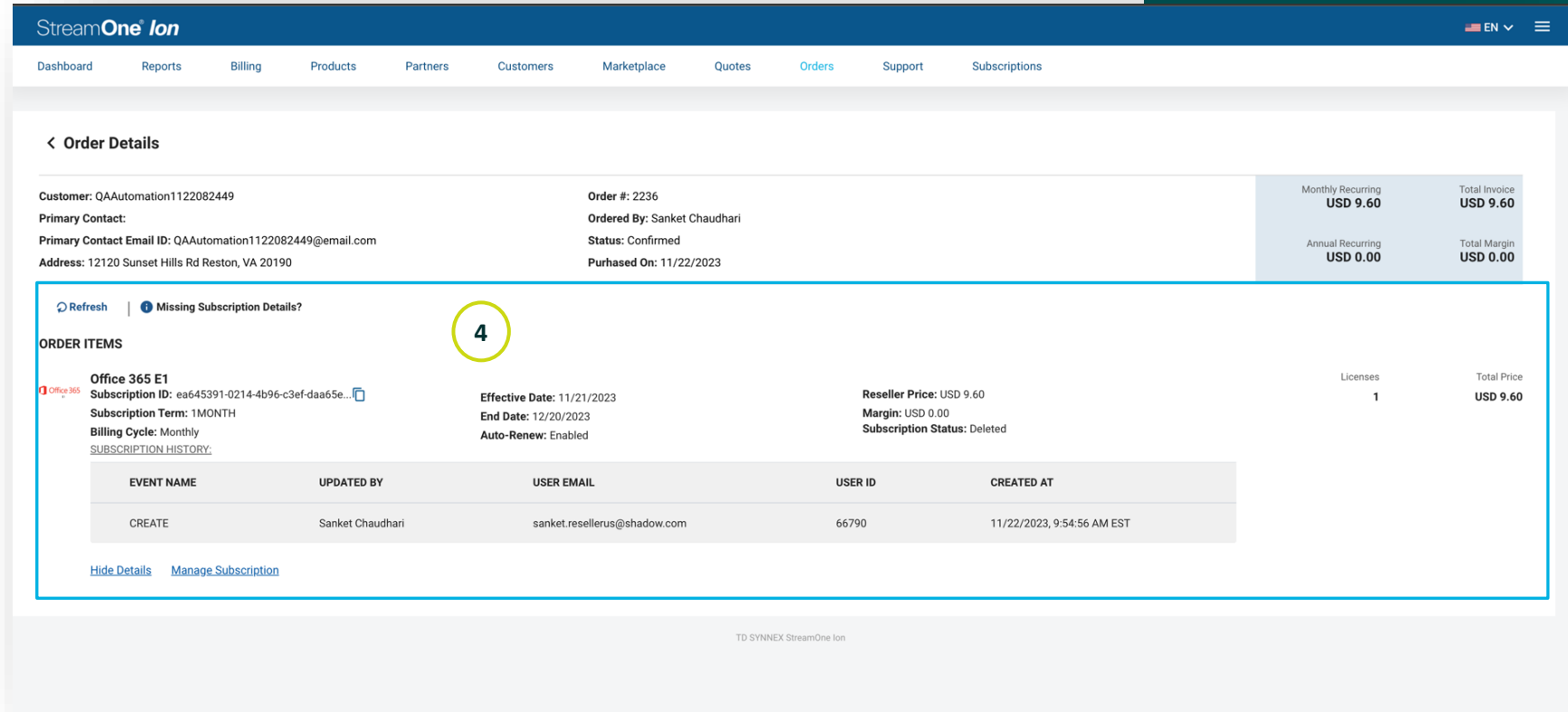

StreamOne® Ion

Dashboard | Reports | Billing | Products | Partners | Customers | Marketplace | Quotes | Orders | Support | Subscriptions

< Order Details

1

Customer: QAAutomation1122082449
Primary Contact:
Primary Contact Email ID: QAAutomation1122082449@email.com
Address: 12120 Sunset Hills Rd Reston, VA 20190

2

Order #: 2236
Ordered By: Sanket Chaudhari
Status: Confirmed
Purhased On: 11/22/2023

3

Monthly Recurring USD 9.60 | Total Invoice USD 9.60
Annual Recurring USD 0.00 | Total Margin USD 0.00

↻ Refresh | ⓘ Missing Subscription Details?

ORDER ITEMS

Office 365 E1
Subscription ID: ea645391-0214-4b96-c3ef-daa65e...
Subscription Term: 1MONTH
Billing Cycle: Monthly
SUBSCRIPTION HISTORY:

Effective Date: 11/21/2023
End Date: 12/20/2023
Auto-Renew: Enabled

Reseller Price: USD 9.60
Margin: USD 0.00
Subscription Status: Deleted

Licenses 1 | Total Price USD 9.60

EVENT NAME	UPDATED BY	USER EMAIL	USER ID	CREATED AT
CREATE	Sanket Chaudhari	sanket.resellerus@shadow.com	66790	11/22/2023, 9:54:56 AM EST

Hide Details   Manage Subscription

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Orders
Orders Details Page

④ Order Items

This section displays details about the subscriptions that are part of this order. The information can be updated to the latest available using the "Refresh" button.

These details include ID, Term, Billing Cycle, Effective and End Dates, Subscription Status, Auto-Renew Status, Reseller Price and Margin. It also includes a Subscription History of change events and which users performed them.

Additionally, all of these order item details can be hidden into a more compact view to facilitate navigation of multi-subscription orders, and you will also find a handy link to "Manage Subscription" that will bring you to the Subscription Details page, where any lifecycle management options can be performed.