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# StreamOne Ion

## Unified Customer Management - Orders

UCM Enhancements  
Vendor Agnostic

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# StreamOne Ion Flattening Enhancements

1. Dashboard
2. Customers
3. Marketplace
4. [Orders](#)
5. Subscriptions

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## Orders

User Experience  
Orders List Page  
Orders Details Page

# 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.

StreamOne *Ion*

EN

Dashboard
Reports
Billing
Products
Partners
Customers
Marketplace
Quotes
Orders
Support
Subscriptions

Orders

search orders

[EXPORT AS CSV](#)
[CREATE NEW ORDER](#)

<input type="checkbox"/>	ORDER ID <small>↑</small>	CUSTOMER NAME <small>↑</small>	PLAN NAME <small>↑</small>	LICENSES <small>↑</small>	ORDER ITEM STATUS <small>↑</small>	PURCHASED BY <small>↑</small>	PURCHASED ON <small>↓</small>
<input type="checkbox"/>	3017	NS 21 NOV	Office 365 E1	6	COMPLETED	SMP Reseller	12/08/2023, 9:40:24 AM EST
<input type="checkbox"/>	3011	Rohini US	Monthly	5	COMPLETED	Sanket Chaudhari	12/08/2023, 8:06:54 AM EST
<input type="checkbox"/>	3010	sal 8th dec	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 8:02:23 AM EST
<input type="checkbox"/>	3009	Rohini WLS	Office 365 E1	1	COMPLETED	DEFAULT ACCOUNT USER	12/08/2023, 7:44:48 AM EST
<input type="checkbox"/>	3008	Mani 05	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 7:40:29 AM EST
			Commercial	1	ERROR		
			Azure SQL Edge - 1 year	2	COMPLETED		
<input type="checkbox"/>	3006	Mani 05	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 7:17:30 AM EST
<input type="checkbox"/>	3005	BA_US_GDAPU6	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 6:54:10 AM EST
<input type="checkbox"/>	3004	SMPPR2	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 6:35:10 AM EST

Items per page: 10
1 ~ 10 of 1099

# 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:

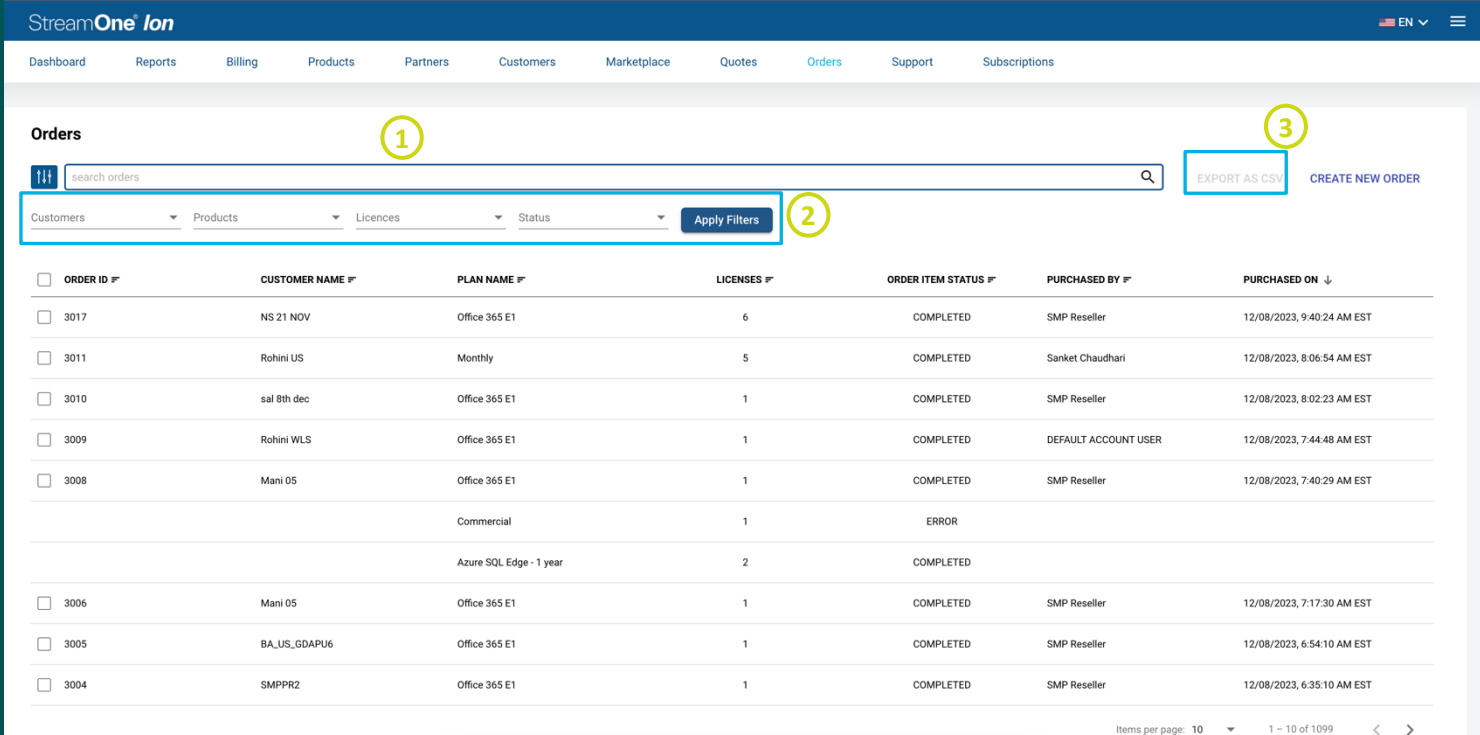
- ✓ Customer Name
- ✓ Plan Name
- ✓ Order ID
- ✓ Order Status
- ✓ Licenses (number)
- ✓ Purchased By

### 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**.



The screenshot shows the StreamOne Ion Orders List Page. The page has a navigation bar with links: Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders (highlighted), Support, and Subscriptions. The main content area is titled 'Orders' and features a search bar (1) with a magnifying glass icon. Below the search bar are four filter dropdowns: Customers, Products, Licenses, and Status, with an 'Apply Filters' button (2). To the right of the search bar are two buttons: 'EXPORT AS CSV' (3) and 'CREATE NEW ORDER'. The table below lists orders with columns: ORDER ID, CUSTOMER NAME, PLAN NAME, LICENSES, ORDER ITEM STATUS, PURCHASED BY, and PURCHASED ON. The table contains 10 rows of data. At the bottom right, there is a pagination control showing 'Items per page: 10' and '1 - 10 of 1099'.

ORDER ID	CUSTOMER NAME	PLAN NAME	LICENSES	ORDER ITEM STATUS	PURCHASED BY	PURCHASED ON
3017	NS 21 NOV	Office 365 E1	6	COMPLETED	SMP Reseller	12/08/2023, 9:40:24 AM EST
3011	Rohini US	Monthly	5	COMPLETED	Sanket Chaudhari	12/08/2023, 8:06:54 AM EST
3010	sal 8th dec	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 8:02:23 AM EST
3009	Rohini WLS	Office 365 E1	1	COMPLETED	DEFAULT ACCOUNT USER	12/08/2023, 7:44:48 AM EST
3008	Mani 05	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 7:40:29 AM EST
		Commercial	1	ERROR		
		Azure SQL Edge - 1 year	2	COMPLETED		
3006	Mani 05	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 7:17:30 AM EST
3005	BA_US_GDAPU6	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 6:54:10 AM EST
3004	SMPPR2	Office 365 E1	1	COMPLETED	SMP Reseller	12/08/2023, 6:35:10 AM EST

### 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

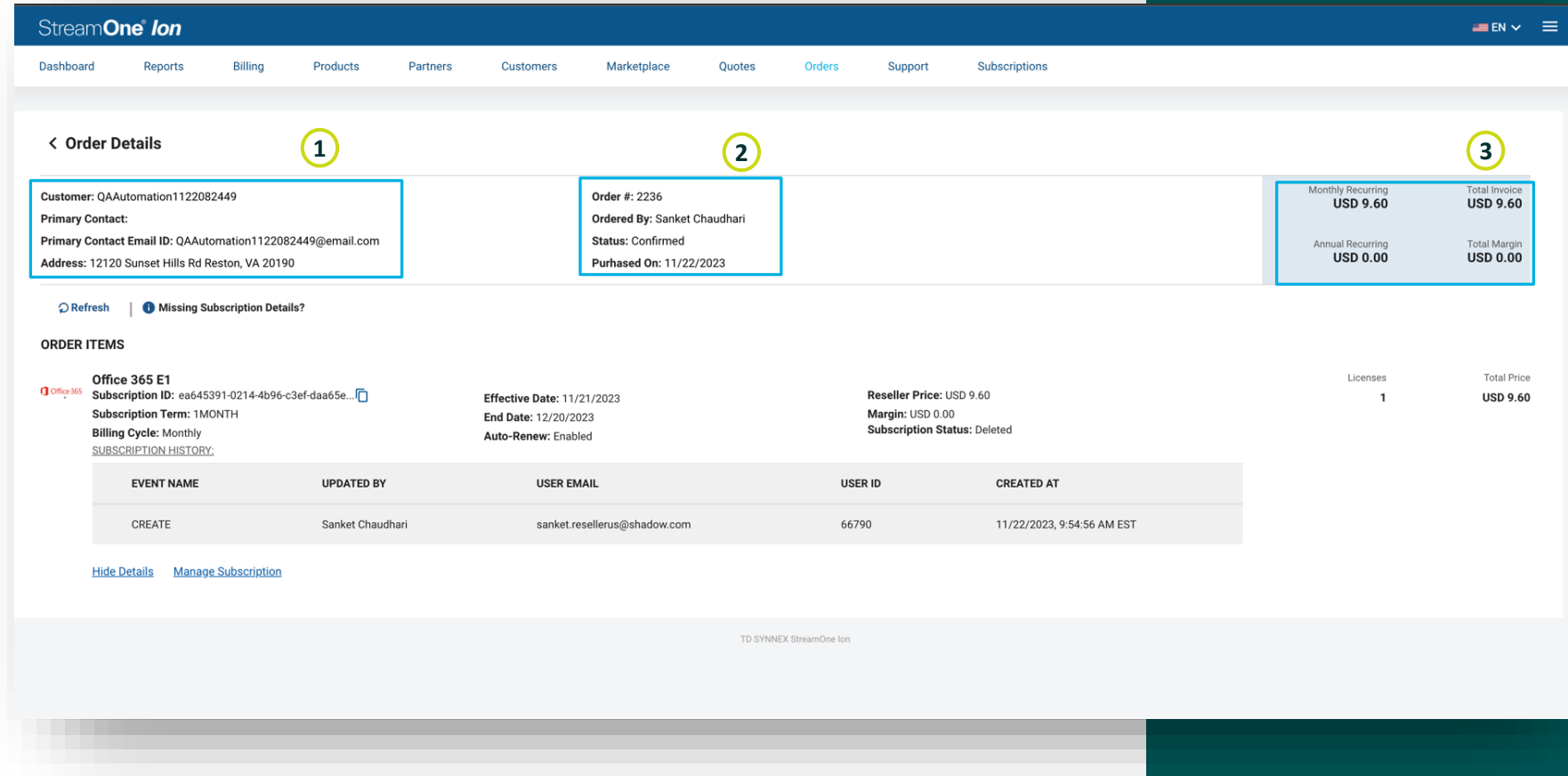
When double-clicking on an Order in the list page, you will be brought to the Order Details page:

### 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.



**StreamOne Ion**

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

**< Order Details**

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

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

**Monthly Recurring USD 9.60**  
**Annual Recurring USD 0.00**  
**Total Invoice USD 9.60**  
**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

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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### 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.

# Orders

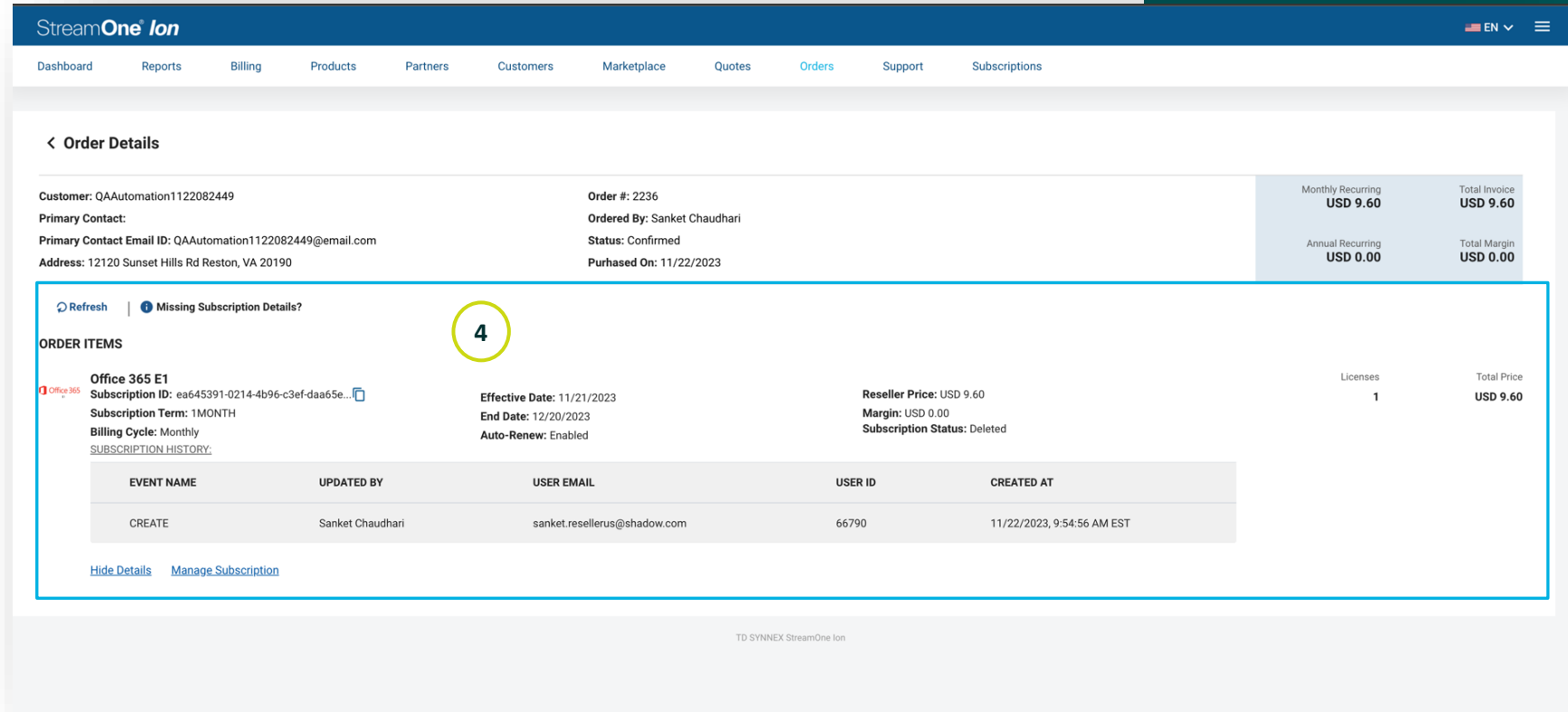
## Orders Details Page

### 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.



StreamOne<sup>®</sup> Ion

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

< Order Details

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

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

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  
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

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

Licenses 1 Total Price USD 9.60

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