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# StreamOne Ion

## Unified Customer Management - Customers

UCM Enhancements  
Vendor Agnostic

# StreamOne Ion

## UCM Enhancements

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

### Customers - User Experience

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#### Customers Navigation

Customers List Page

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#### Customer Profile - Overview Page

Inventory

Orders

Activity Log

# Customers

## User Experience

The Customers module provides users with a complete database of the customer. This allows the owner of the account to manage the customer information and view the important information that the user may need to know about their customers.

StreamOne *lon* EN

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

**Customers**

Search MANAGE COLUMNS ASSIGN PRICE BOOK EXPORT CSV DELETE EDIT ADD

Customers Status Primary Contact Cloud Provider Apply Filters

<input type="checkbox"/> CUSTOMER N...	STATUS	PRIMARY CON...	CLOUD PROVI...	PRIMARY CON...	NOTIFICATIONS	QUOTES	REQUESTS	ORDERS	PURCHASED L...
<input type="checkbox"/> #1stjulyNCE	ACTIVE	july31nce@apptium.com	MS-CSP +4	prabhaa karan	120	2	4	0	12
<input type="checkbox"/> 012	ACTIVE	jkl_Customer3@gmail.com	IBM +2	jkl_Customer3	0	0	0	0	0
<input type="checkbox"/> 02_MARKETPLACECHECK18	ACTIVE	MARKETPLACECHECK18@yop...	MS-CSP	Sindhu	15	0	0	0	1
<input type="checkbox"/> 03312022 Org	ACTIVE	greg.small@mandyandgreg.com	Google Workspace +35	AutomationCustomer03312022	1201	0	0	0	6
<input type="checkbox"/> 1resellercust_LXVI	ACTIVE	b66@resellercustlvi.com	Google Workspace +6	b66 y66	126	0	0	6	3
<input type="checkbox"/> 1resellercust_LXXVII	ACTIVE	b67@resellercustlvii.com	MS-CSP +1	b67 y67	3	0	0	0	1
<input type="checkbox"/> 1resellercust_LXX	ACTIVE	b70@resellercustlxx.com	IBM	b70 y70	0	0	0	1	0
<input type="checkbox"/> 1resellercust_LXXI	ACTIVE	b71@resellercustlxi.com		b71 y71	0	0	0	0	0
<input type="checkbox"/> 1resellercust_LXXX	ACTIVE	b80@resellercustlxxx.com		b80 y80	0	0	0	0	0
<input type="checkbox"/> 1resellercust_LXXXI	ACTIVE	b81@resellercustlxxxi.com		b81 y81	0	0	0	0	0
<input type="checkbox"/> 1resellercust_LXXXII	ACTIVE	b82@resellercustlxxxi.com		b82 y82	0	0	0	0	0
<input type="checkbox"/> 1resellercust_LXXXIV	ACTIVE	b84@resellercustlxxiv.io	Google Workspace +1	b84 y84	28	0	1	0	2
<input type="checkbox"/> 29102023	ACTIVE	apptium@12345		app	0	0	0	0	0

# Customers

## Navigation – Customers List Page

### 1 Search

You can refine your results by searching for a customer of interest. You can **search** for:

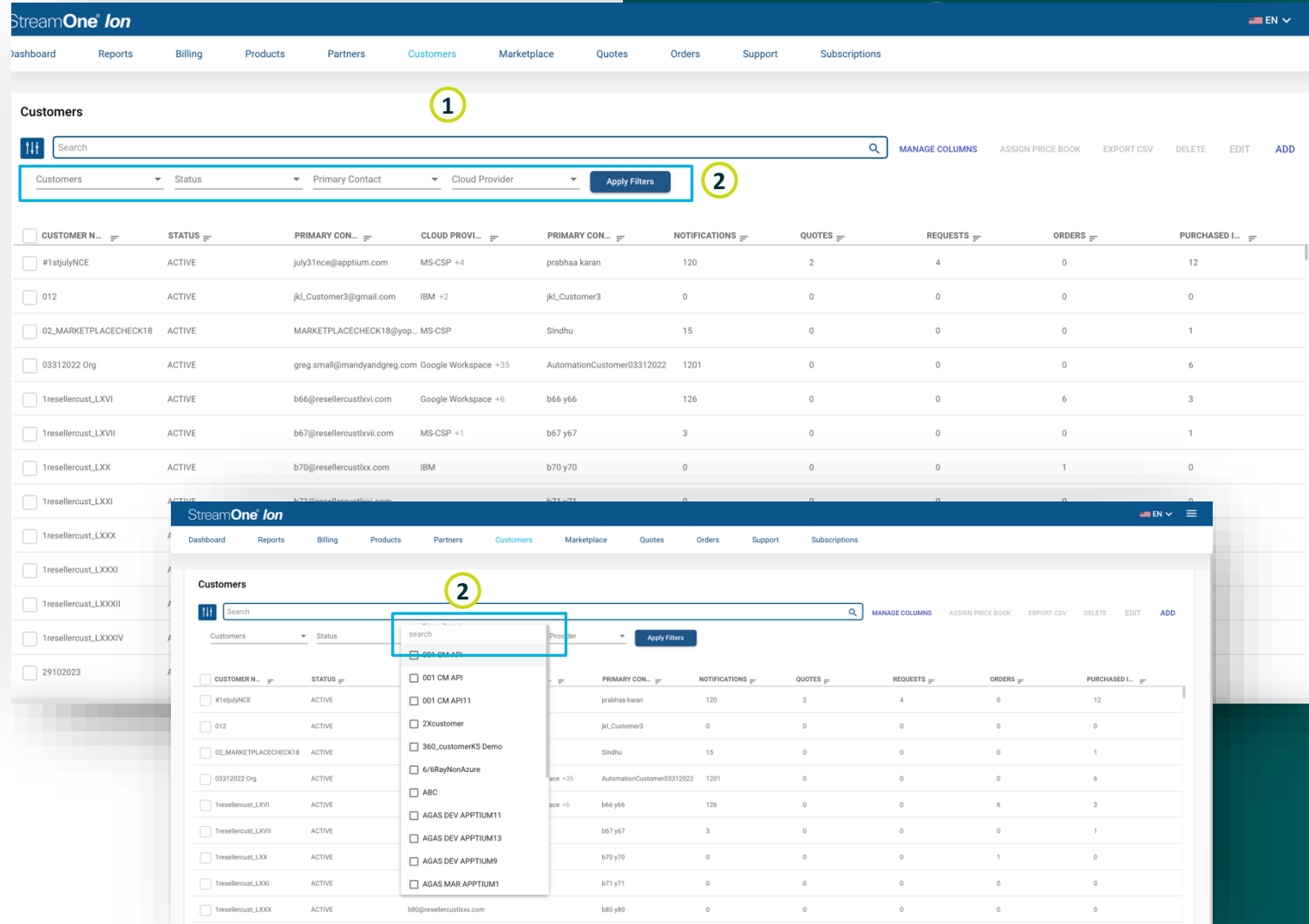
- ✓ Customer Name
- ✓ Primary Contact (Name, Email)
- ✓ Cloud Provider

### 2 Filters

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

- ✓ Customers (Customer Name)
- ✓ Status
- ✓ Primary Contact (Name)
- ✓ Cloud Provider.

**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 displays the StreamOne Ion Customers List Page. The page features a navigation bar at the top with various tabs including Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders, Support, and Subscriptions. The Customers tab is selected. Below the navigation bar, there is a search bar (labeled 1) and a filter section (labeled 2). The filter section includes dropdown menus for Customers, Status, Primary Contact, and Cloud Provider, along with an 'Apply Filters' button. The main content area shows a table of customer records with columns for Customer Name, Status, Primary Contact, Cloud Provider, Primary Contact, Notifications, Quotes, Requests, Orders, and Purchased. An inset shows a close-up of the filter dropdowns, highlighting the search bar within the filter section (labeled 2).

CUSTOMER N...	STATUS	PRIMARY CON...	CLOUD PROVI...	PRIMARY CON...	NOTIFICATIONS	QUOTES	REQUESTS	ORDERS	PURCHASED L...
#1stjulyNCE	ACTIVE	july31nce@apptium.com	MS-CSP +4	prabhaa karan	120	2	4	0	12
012	ACTIVE	jkL_Customer3@gmail.com	IBM +2	jkL_Customer3	0	0	0	0	0
02_MARKETPLACECHECK18	ACTIVE	MARKETPLACECHECK18@yop...	MS-CSP	Sindhu	15	0	0	0	1
03312022 Org	ACTIVE	greg.smal@mandyandgreg.com	Google Workspace +35	AutomationCustomer03312022	1201	0	0	0	6
1resellercust_LXXVI	ACTIVE	b66@resellercustlxi.com	Google Workspace +6	b66 y66	126	0	0	6	3
1resellercust_LXXVII	ACTIVE	b67@resellercustlxvii.com	MS-CSP +1	b67 y67	3	0	0	0	1
1resellercust_LXXX	ACTIVE	b70@resellercustlxx.com	IBM	b70 y70	0	0	0	1	0
1resellercust_LXXXI	ACTIVE	b71@resellercustlxxi.com	IBM	b71 y71	0	0	0	0	0
1resellercust_LXXXII	ACTIVE	b72@resellercustlxxii.com	IBM	b72 y72	0	0	0	0	0
1resellercust_LXXXIII	ACTIVE	b73@resellercustlxxiii.com	IBM	b73 y73	0	0	0	0	0
1resellercust_LXXXIV	ACTIVE	b74@resellercustlxxiv.com	IBM	b74 y74	0	0	0	0	0
29102023	ACTIVE	b75@resellercustlxxv.com	IBM	b75 y75	0	0	0	0	0

# Customers

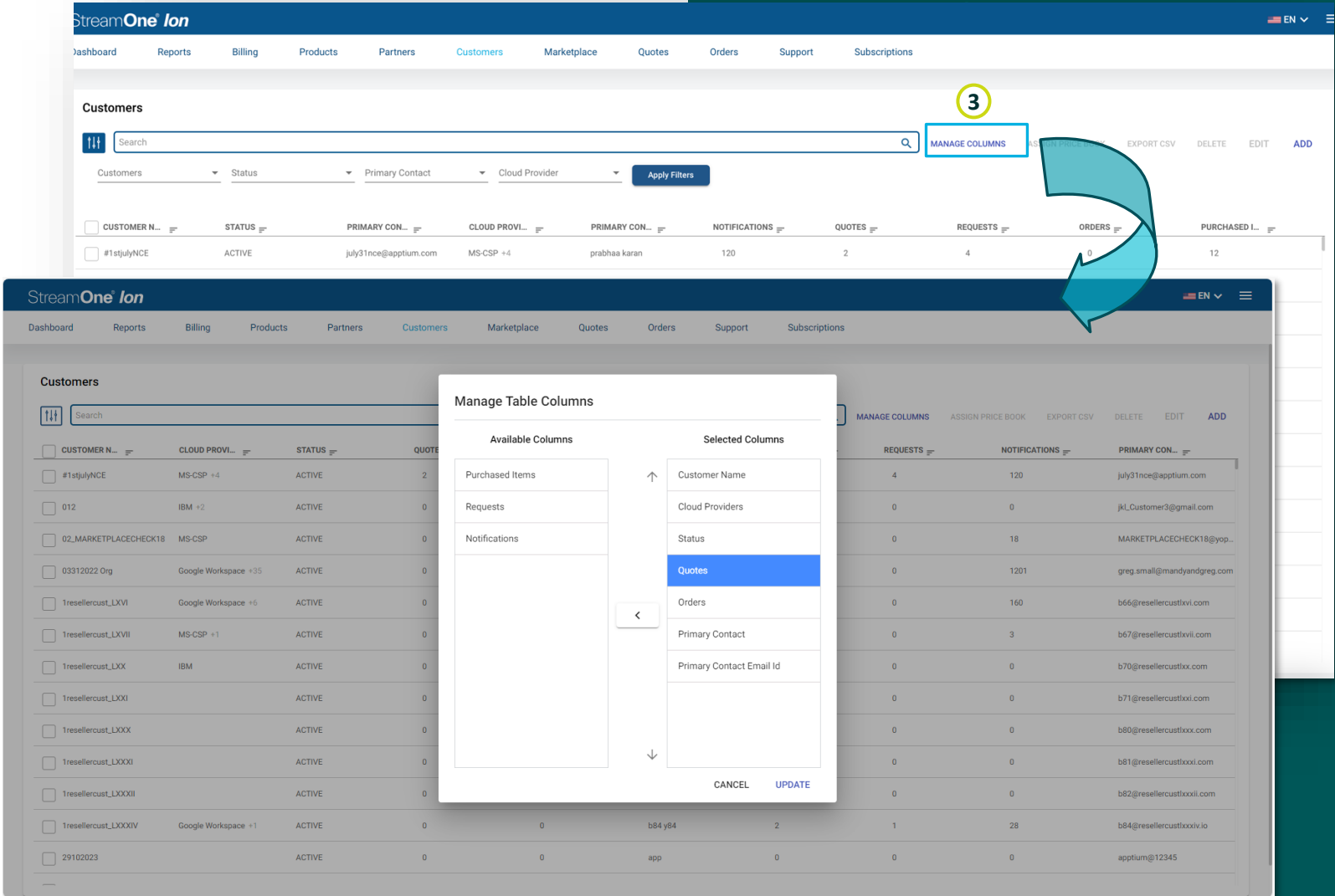
## Navigation – Customers List Page

### 3 Manage Columns

The columns visible in each account can be customized by **adding or removing columns**, following the same logic and design custom Reports have, that you may be already familiar with. By simply selecting fields from the “Available Columns” list and moving them to the “Selected Columns” list, you choose which become visible or hidden. The **position** within the page can also be changed by selecting a field and using the up/down arrows.

Five **new key datapoints** added to the view: Purchased Items, Orders, Quotes, Notifications, Requests. These are counter fields that show the total amount of those items, regardless of their status.

This view is **shared across all users** of the account, just like saved Dashboards.



The screenshot displays the StreamOne lon interface. The top navigation bar includes links for Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders, Support, and Subscriptions. The main content area is titled "Customers" and features a search bar, a "MANAGE COLUMNS" button (highlighted with a yellow circle and a blue arrow), and a table of customer data. The table columns include CUSTOMER N..., STATUS, PRIMARY CON..., CLOUD PROVL..., PRIMARY CON..., NOTIFICATIONS, QUOTES, REQUESTS, ORDERS, and PURCHASED L... The "Manage Table Columns" dialog box is open, showing a list of available columns (Purchased Items, Requests, Notifications) and a list of selected columns (Customer Name, Cloud Providers, Status, Quotes, Orders, Primary Contact, Primary Contact Email Id). The "Quotes" column is highlighted in blue in the selected list. The dialog box has "CANCEL" and "UPDATE" buttons at the bottom.

# Customer Overview Inventory

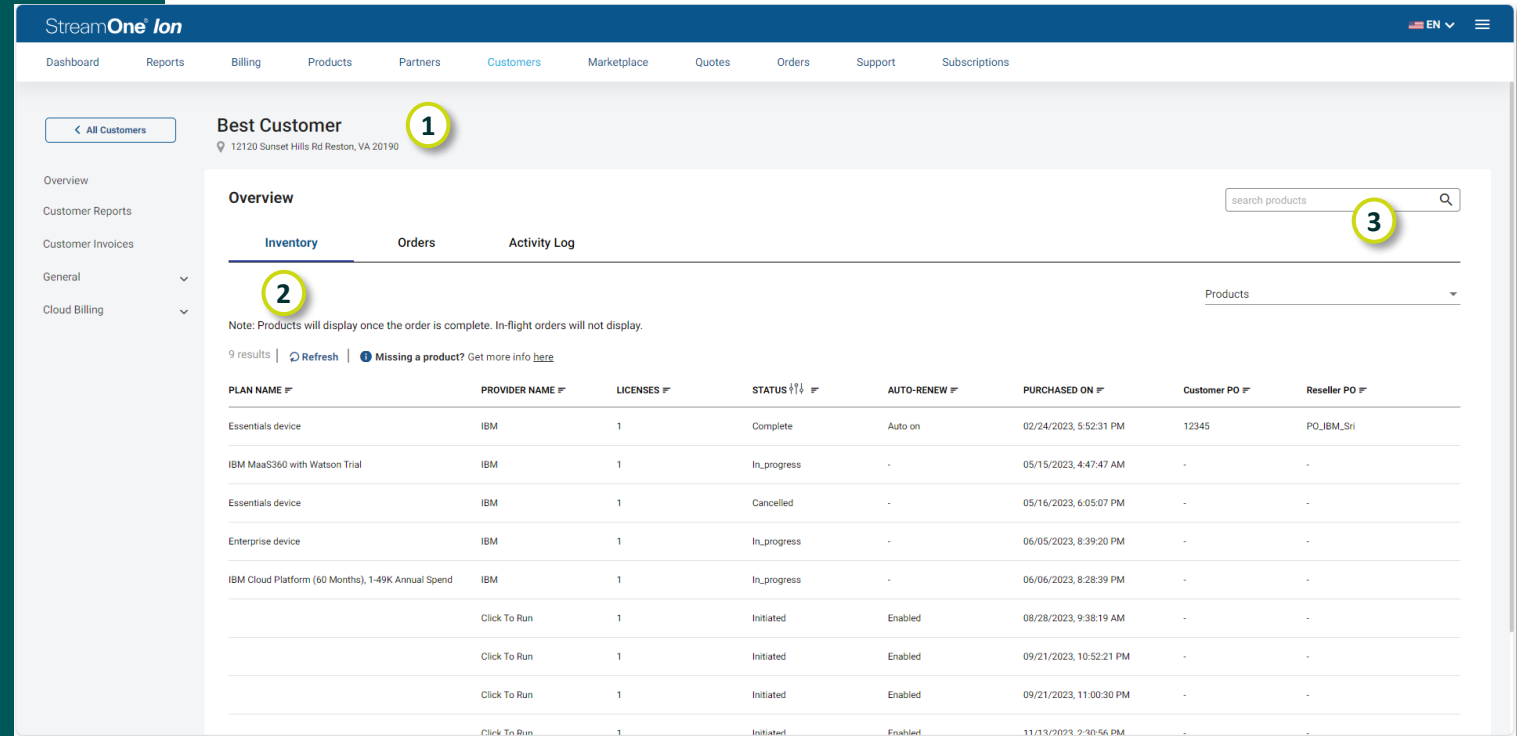
## 1 Customer Profile

Double clicking a customer in the Customers List page will bring you to the **Customer Overview** page, where you can see and manage all aspects of a Customer.

## 2 Inventory

The Inventory tab displays comprehensive list of **all the products and subscriptions** purchased by the customer. It is similar to the [Subscriptions List page in the new module](#), but this has different columns and searchable fields, and the *Refresh* functionality.

This tab also continues to host the IBM Legacy Orders functionality at the top-right of the screen.



The screenshot shows the StreamOne IaaS Customer Overview page. The page has a navigation bar with tabs: Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders, Support, and Subscriptions. The 'Customers' tab is active, showing a list of customers. The 'Best Customer' profile is selected, showing the address: 12120 Sunset Hills Rd Reston, VA 20190. The 'Overview' section has three tabs: Inventory, Orders, and Activity Log. The 'Inventory' tab is selected, showing a table of products and subscriptions. A search bar is visible in the top right of the inventory section.

PLAN NAME	PROVIDER NAME	LICENSES	STATUS	AUTO-RENEW	PURCHASED ON	Customer PO	Reseller PO
Essentials device	IBM	1	Complete	Auto on	02/24/2023, 5:52:31 PM	12345	PO_IBM_SH
IBM MaaS360 with Watson Trial	IBM	1	In_progress	-	05/15/2023, 4:47:47 AM	-	-
Essentials device	IBM	1	Cancelled	-	05/16/2023, 6:05:07 PM	-	-
Enterprise device	IBM	1	In_progress	-	06/05/2023, 8:39:20 PM	-	-
IBM Cloud Platform (60 Months), 1-49K Annual Spend	IBM	1	In_progress	-	06/06/2023, 8:28:39 PM	-	-
Click To Run		1	Initiated	Enabled	08/28/2023, 9:38:19 AM	-	-
Click To Run		1	Initiated	Enabled	09/21/2023, 10:52:21 PM	-	-
Click To Run		1	Initiated	Enabled	09/21/2023, 11:00:30 PM	-	-
Click To Run		1	Initiated	Enabled	11/13/2023, 2:30:56 PM	-	-

## 3 Search

You can refine your results in the Inventory by searching for subscriptions of interest. You can **search** for:

- ✓ Plan Name
- ✓ Provider Name
- ✓ Status
- ✓ Reseller PO
- ✓ Customer PO

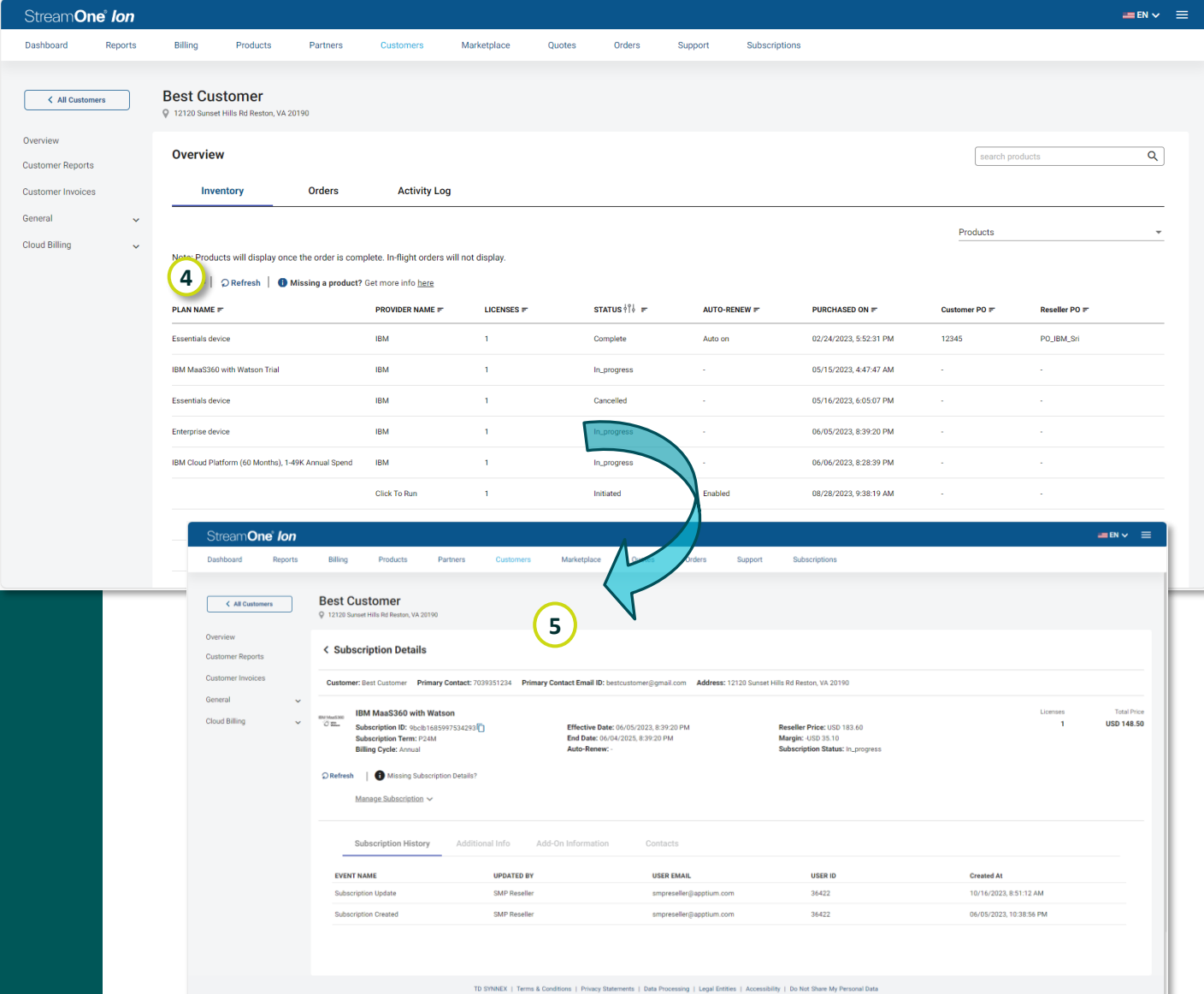
# Customer Overview Inventory

## 4 Refresh

Subscriptions **update frequency has not changed**, taking a few hours to include the latest purchases, depending on the Cloud Provider. However, you can click on the “**Refresh**” button to view any newly purchased subscription in the list **at any given time** without having to wait for the next update.

## 5 Subscription Details

When you **double-click** on a specific subscription, you'll access the 'Subscription Details'. This view provides **key information**, including the Customer contact information, Subscription details which includes the reseller price, customer price and the margin, Subscription history, Additional Information, Entitlements and other product-specific tabs that represent different attributes of the products within the subscription.



The screenshot displays the StreamOne lon interface. The top navigation bar includes links for Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders, Support, and Subscriptions. The main content area is titled 'Best Customer' and shows an 'Overview' section with tabs for Inventory, Orders, and Activity Log. A table lists various subscriptions, including 'Essentials device', 'IBM MaaS360 with Watson Trial', and 'IBM Cloud Platform'. A blue arrow points from the 'Refresh' button in the table to the 'Subscription Details' view, which is shown in a separate window. The 'Subscription Details' view for 'IBM MaaS360 with Watson' provides comprehensive information, including customer contact details, subscription ID, effective date, end date, auto-renew status, reseller price, margin, and a subscription history table.

PLAN NAME	PROVIDER NAME	LICENSES	STATUS	AUTO-RENEW	PURCHASED ON	CUSTOMER PO	RESSELLER PO
Essentials device	IBM	1	Complete	Auto on	02/24/2023, 5:52:31 PM	12345	PO_IBM_Sii
IBM MaaS360 with Watson Trial	IBM	1	In_progress	-	05/15/2023, 4:47:47 AM	-	-
Essentials device	IBM	1	Cancelled	-	05/16/2023, 6:05:07 PM	-	-
Enterprise device	IBM	1	In_progress	-	06/05/2023, 8:39:20 PM	-	-
IBM Cloud Platform (60 Months), 1-49K Annual Spend	IBM	1	In_progress	-	06/06/2023, 8:28:39 PM	-	-
Click To Run	IBM	1	Initiated	Enabled	08/28/2023, 9:38:19 AM	-	-

EVENT NAME	UPDATED BY	USER EMAIL	USER ID	Created At
Subscription Update	SMP Reseller	smreseller@apptium.com	36422	10/16/2023, 8:51:12 AM
Subscription Created	SMP Reseller	smreseller@apptium.com	36422	06/05/2023, 10:38:56 PM

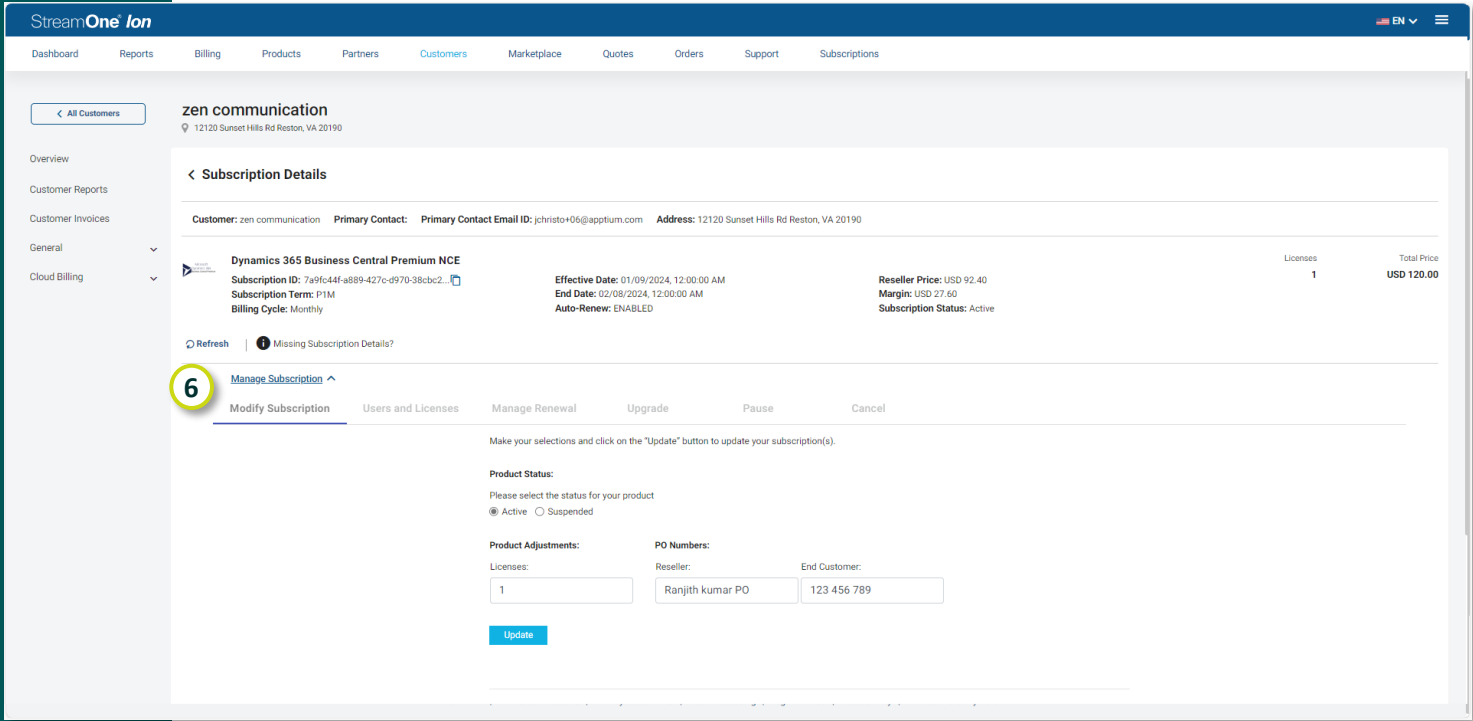
# Customer Overview

## Inventory



### 6 Manage Subscription

Within the Subscription Details page, you will find the option to twirl down the “Manage Subscription” options. These menus are product-specific, and they **continue** to dynamically display the different **lifecycle management options** each product offers depending on their nature, status, type, etc., but now with a horizontal design of different tabs.



# Customer Overview

## Orders



### 1 Orders

This tab provides a list of orders specific to the Customer to provide **insight** into order history. It is similar to the Orders List page in the new Orders module, although that page has some additional options covered in the new Orders document. This Orders tab has a search bar that allows you to narrow down results based on:

- ✓ Order ID
- ✓ Order Status
- ✓ Plan Name
- ✓ Purchased By

### 2 Legacy Orders

Orders for this Customer placed after the release of the *Unified Customer Management* new Marketplace will display in this page when this toggle is off. To see older orders placed in the previous “Buy Products” experience within the Customer profile, you can toggle on “*Legacy Orders*”.

The screenshot displays the StreamOne Ion interface for the 'Susana US' customer profile. The 'Orders' tab is selected, showing a table of recent orders. A search bar is located at the top right of the orders section. A toggle switch for 'Legacy Orders' is visible on the right side of the page. An inset window shows the same page with the 'Legacy Orders' toggle turned on, revealing a list of older orders.

**StreamOne Ion**

Dashboard Reports Billing Products Partners Customers Marketplace Quotes Orders Support Subscriptions

< All Customers

**Susana US**  
16202 Bay Vista Dr Clearwater, FL 33760-3126

Overview

Customer Reports  
Customer Invoices  
General  
Customer Information  
Notifications  
Users  
Custom fields  
Customer options  
Cloud Billing  
Cloud Providers  
Cloud Accounts  
Tax Profile  
Credits  
Charges and Discounts  
Detailed Billing Exports

**Overview**

Inventory Orders Activity Log

search orders

Legacy Orders

ORDER ID	PLAN NAME	LICENSES	ORDER ITEM STATUS	PURCHASED BY	PURCHASED ON
271626	Office 365 E1 for Mid-Market	1	ERROR	SMP Reseller	01/25/2024, 2:45:01 PM GMT+1
271214	Microsoft 365 E3	1	COMPLETED	Joan Rubies	01/16/2024, 9:59:57 AM GMT+1
	Microsoft 365 Apps for business	1	COMPLETED		
271010	Office 365 E1	1	COMPLETED	SMP Reseller	01/08/2024, 10:45:34 PM GMT+1
271007					
270856					
270819					
270817					
270816					
270815					

**StreamOne Ion**

Dashboard Reports Billing Products Partners Customers Marketplace Quotes Orders Support Subscriptions

< All Customers

**Susana US**  
16202 Bay Vista Dr Clearwater, FL 33760-3126

Overview

Customer Reports  
Customer Invoices  
General  
Customer Information  
Notifications  
Users  
Custom fields  
Customer options  
Cloud Billing  
Cloud Providers  
Cloud Accounts  
Tax Profile  
Credits

**Overview**

Inventory Orders Activity Log

search orders

Legacy Orders

125 Orders

ORDER ID	PRODUCT NAME	PLAN	TERM	QUANTITY	PRICE	STATUS
> #148336	1 Product					
> #148232	1 Product					
> #147278	2 Products					
> #146964	1 Product					
> #146958	2 Products					
	Microsoft 365 NCE	Microsoft 365 Apps for business	Monthly	1	USD 9.96	
	Microsoft 365 NCE	Microsoft 365 Business Basic	Monthly - Annual Commit	1	USD 72.00	

# Customer Overview

## Orders

### 3 Order Details

When you double-click on a specific order, you will access the ‘Order Details’. This view provides **key information**, including customer details, payments/cost breakdown and subscription-specific details.

This page also contains **Subscription History** and a handy link to the “Manage Subscription” options explained in the previous slide, so you can peek into any subscription’s current status and easily start managing it.

StreamOne *Ion*

Dashboard Reports Billing Products Partners Customers Marketplace Quotes Orders Support Subscriptions

< All Customers

Susana US  
16202 Bay Vista Dr Clearwater, FL 33760-3126

Overview

Customer Reports

Customer Invoices

General

Customer Information

Notifications

Users

Custom fields

Customer options

Cloud Billing

Cloud Providers

Cloud Accounts

Tax Profile

Overview

Inventory

Orders

Activity Log

search orders

Legacy Orders

ORDER ID #	PLAN NAME #	LICENSES #	ORDER ITEM STATUS #	PURCHASED BY #	PURCHASED ON ↓
271626	Office 365 E1 for Mid-Market	1	ERROR	SMP Reseller	01/25/2024, 2:45:01 PM GMT+1
271214	Microsoft 365 E3	1	COMPLETED	Joan Rubies	01/16/2024, 9:59:57 AM GMT+1
	Microsoft 365 Apps for business	1	COMPLETED		
271010	Office 365 E1	1	COMPLETED	SMP Reseller	01/08/2024, 10:45:34 PM GMT+1
271067	Microsoft 365 Apps for business	1	COMPLETED	Joan Rubies	01/08/2024, 5:10:52 PM GMT+1
	Microsoft 365 Business Basic	1	COMPLETED		
270856	Office 365 E1	1	COMPLETED	SMP Reseller sample	01/04/2024, 6:49:35 PM GMT+1

StreamOne *Ion*

Dashboard Reports Billing Products Partners Customers Marketplace Quotes Orders Support Subscriptions

< All Customers

Susana US  
16202 Bay Vista Dr Clearwater, FL 33760-3126

Overview

Customer Reports

Customer Invoices

General

Customer Information

Notifications

Users

Custom fields

Customer options

Cloud Billing

Cloud Providers

Cloud Accounts

Tax Profile

Credits

Charges and Discounts

Detailed Billing Exports

< Order Details 3

Customer: Susana US

Primary Contact: 9014448888

Primary Contact Email ID: test2010@yopmail.com

Address: 16202 Bay Vista Dr Clearwater, FL 33760-3126

Order #: 271007

Ordered By: Joan Rubies

Status: Completed

Purchased On: 01/08/2024, 5:10:52 PM GMT+1

Monthly Recurring  
USD 21.96

Total Invoice  
USD 153.96

Annual Recurring  
USD 0.00

Total Margin  
USD 3.28

Refresh

Missing Subscription Details? Get more info [here](#)

ORDER ITEMS

Microsoft 365 Apps for business

Subscription ID: aacaa35e-93ac-4377-d408-d6b980...

Subscription Term: 1MONTH

Billing Cycle: Monthly

SUBSCRIPTION HISTORY:

Effective Date: 01/08/2024, 1:00:00 AM GMT+1

End Date: 02/07/2024, 1:00:00 AM GMT+1

Auto-Renew: Enabled

Reseller Price: USD 9.56

Margin: USD 0.40

Subscription Status: Active

Licenses  
1

Total Price  
USD 9.96

EVENT NAME	UPDATED BY	USER EMAIL	USER ID	CREATED AT
CREATE	Joan Rubies	joan.reseller@shadow.com	44701	01/08/2024, 5:10:52 PM GMT+1

[Hide Details](#) [Manage Subscription](#)

Microsoft 365 Business Basic

Subscription ID: 7bef091f-33ee-4245-c7aa-169077...

Subscription Term: 1YEAR

Billing Cycle: Monthly

Effective Date: 01/08/2024, 1:00:00 AM GMT+1

End Date: 01/07/2025, 1:00:00 AM GMT+1

Auto-Renew: Enabled

Reseller Price: USD 69.12

Margin: USD 2.88

Subscription Status: Active

Licenses  
1

Total Price  
USD 144.00

# Customer Overview

## Activity Log

1

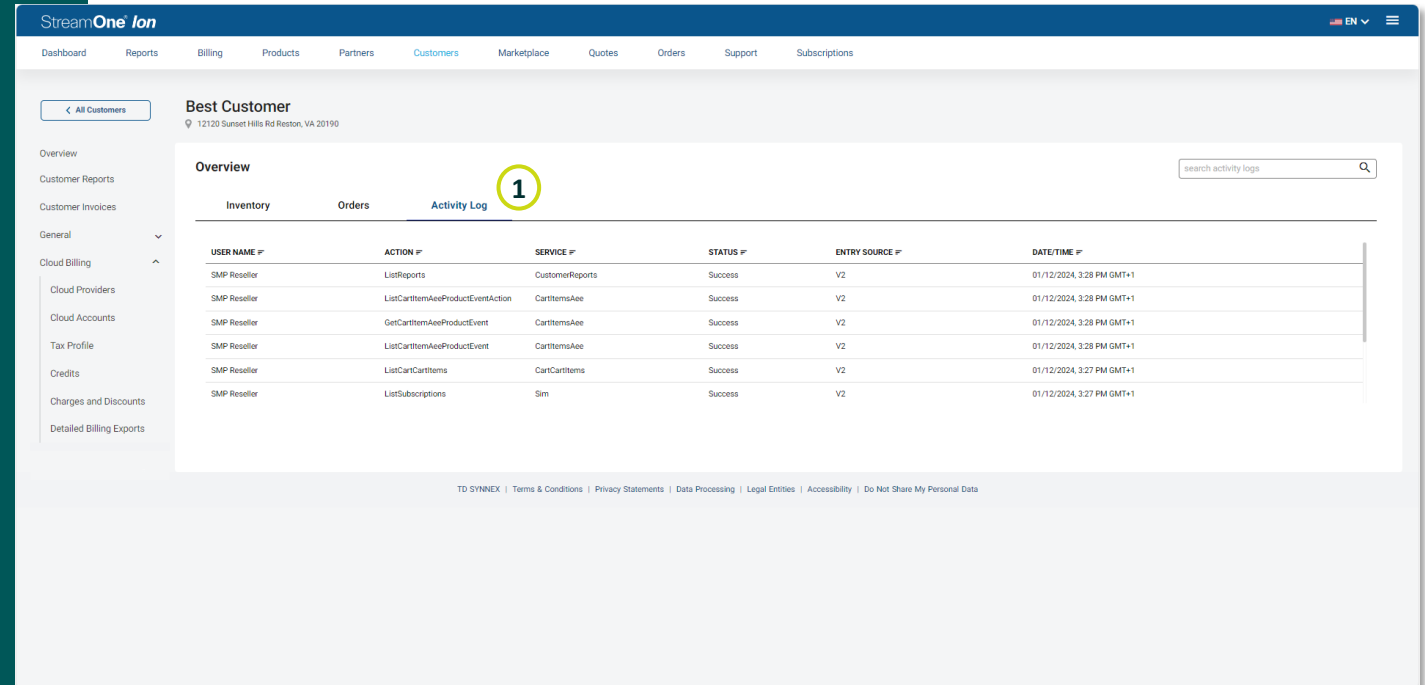
### Activity Log

This tab displays a list of all the actions performed on the account.

This information is **sourced from the existing Activity Log Report** within the Customer under the Reports Module, being here specifically filtered for activities related to this customer.

This tab has a search bar that allows narrowing down the visible selection using:

- ✓ User Name
- ✓ Action
- ✓ Service
- ✓ Status



The screenshot shows the StreamOne Ion web application interface. The top navigation bar includes links for Dashboard, Reports, Billing, Products, Partners, Customers, Marketplace, Quotes, Orders, Support, and Subscriptions. The left sidebar lists various customer management options. The main content area is titled 'Best Customer' and shows the 'Activity Log' tab selected. A search bar is present at the top right of the activity log section. The activity log table displays a list of actions performed on the account, with columns for User Name, Action, Service, Status, Entry Source, and Date/Time.

USER NAME #	ACTION #	SERVICE #	STATUS #	ENTRY SOURCE #	DATE/TIME #
SMP Reseller	ListReports	CustomerReports	Success	V2	01/12/2024, 3:28 PM GMT+1
SMP Reseller	ListCartItemAeeProductEventAction	CartItemAee	Success	V2	01/12/2024, 3:28 PM GMT+1
SMP Reseller	GetCartItemAeeProductEvent	CartItemAee	Success	V2	01/12/2024, 3:28 PM GMT+1
SMP Reseller	ListCartItemAeeProductEvent	CartItemAee	Success	V2	01/12/2024, 3:28 PM GMT+1
SMP Reseller	ListCartItemAee	CartItemAee	Success	V2	01/12/2024, 3:27 PM GMT+1
SMP Reseller	ListSubscriptions	Sim	Success	V2	01/12/2024, 3:27 PM GMT+1