Orders Summary by Date Range

04/30/2025 3:24 pm CDT

Overview

In this article, you will learn about Sellercloud's **Orders Summary by Date Range** report. This report summarizes all orders within a specific date range, including information about order details, financial summaries, and customer details.

You can see the following:

- **Order Summary:** Customer Name, Orders, Quantity, Subtotal, Shipping, Tax, Discount, Shipping Discount, and Grand Total.
- **Financial Summary:** Payment, Refunds, Adjustments, Item Cost, Shipping Cost, Total Fees, Item Cost Total, Cash Profit, Cash Profit Margin, Accrual Profit, and Accrual Profit Margin.
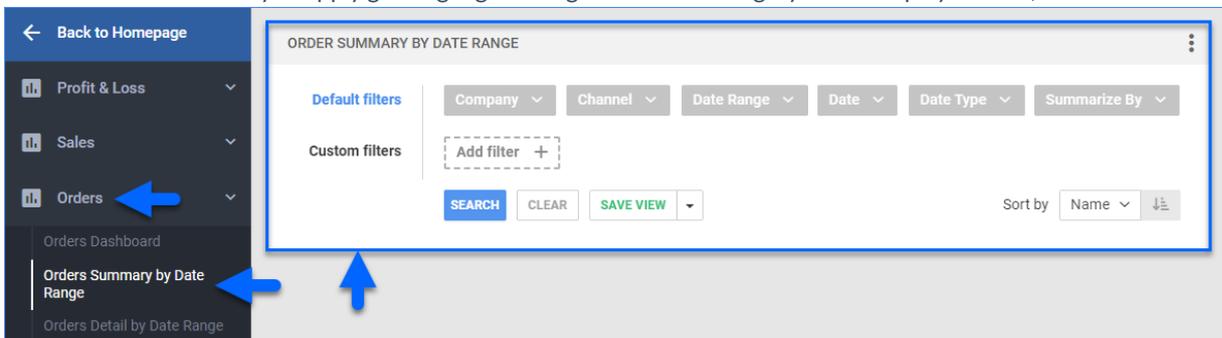
You can run this report automatically on a regular basis with Scheduled Tasks.
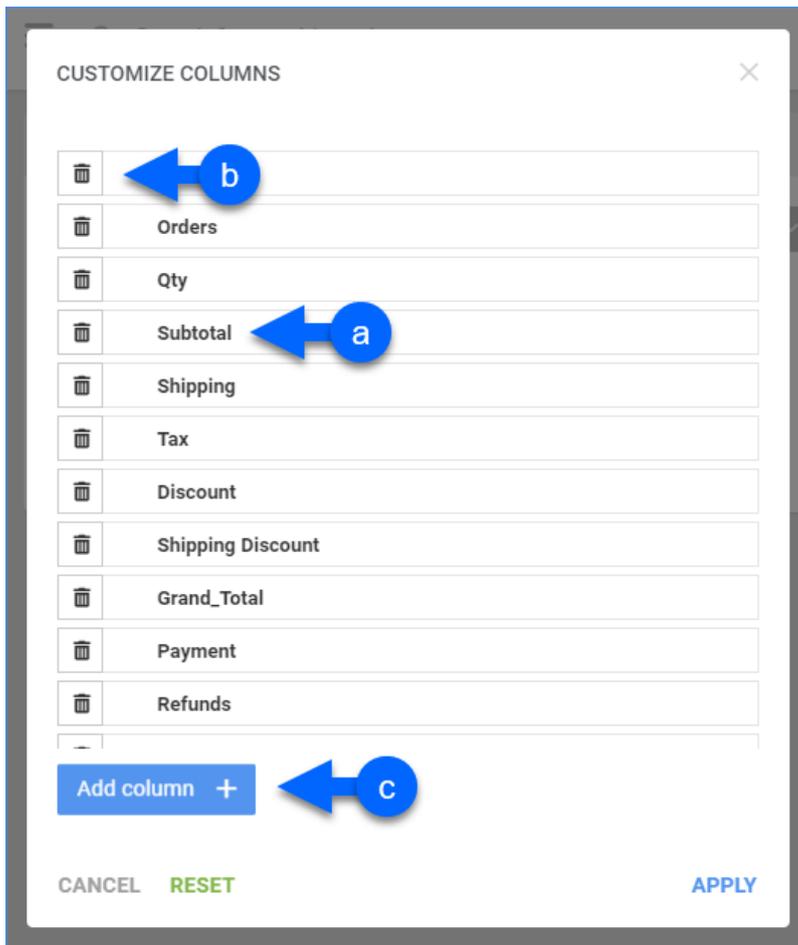For more information about Sellercloud's Financial Reporting Suite, see the Reports FAQ.

Access and Customize the Report

To use the report, follow these steps:

1. Navigate to **Reports** > **Orders** > **Orders Summary by Date Range**.

2. Set up the **Default** and **Custom filters** to have the report show precisely what you need.

3. Click **Search**. Each filter you apply gets highlighted in green. If a filter is gray or not displayed at all, it's not active.
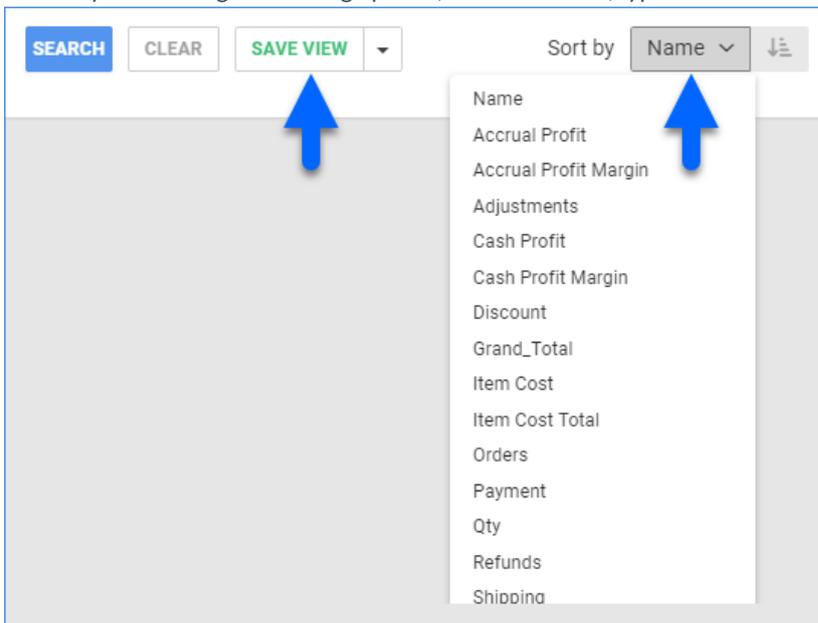

4. To manage the columns in the report, click the three dots icon on the top right and select **Customize Columns**. You can:

   a. Reorder columns by dragging them up or down in the list;

   b. Hide columns by clicking the **Trash** icons;

   c. Add columns by clicking **Add column**.

CUSTOMIZE COLUMNS

🗑	b
🗑	Orders
🗑	Qty
🗑	Subtotal a
🗑	Shipping
🗑	Tax
🗑	Discount
🗑	Shipping Discount
🗑	Grand_Total
🗑	Payment
🗑	Refunds

Add column + c

CANCEL   RESET   APPLY

5. To sort the data differently, use the **Sort by** menu.

6. To save your filtering and sorting options, click **Save view**, type a **Name** and click **Save**.

SEARCH CLEAR SAVE VIEW ▼   Sort by Name ∨ ⬇≡

Name
Accrual Profit
Accrual Profit Margin
Adjustments
Cash Profit
Cash Profit Margin
Discount
Grand_Total
Item Cost
Item Cost Total
Orders
Payment
Qty
Refunds
Shipping

7. To export the full report to a spreadsheet, click **Actions** on the bottom right and select **Export to Excel**. Spreadsheets include all columns, including those hidden in the report.

CHANNEL	ORDERS	QTY	SUBTOTAL	SHIPPING	TAX	DISCOUNT	SHIPPING DISCOUNT	PAYMENT	REFUNDS	ADJUSTMENTS
Wholesale	83	1630	$46,998.33	$60.00	$1,802.84	$0.00	$0.00	$47,034.56	$733.55	$0.00
Website	3	7	$144.91	$0.00	$0.00	$0.00	$0.00	$144.91	$5.00	$0.00
Walmart_Marketplace	1	2	$43.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Local_Store	384	98822	$52,266,829.65	$2.00	$20.24	$0.00	$0.00	$1,503.65	$13.31	($11.67)
Amazon	7	29	$552.29	$0.00	$0.13	$0.00	$0.00	$552.42	$170.32	$0.00
Totals			$52,314,568.18	$62.00	$1,823.21	$0.00	$0.00	$49,235.54	$922.1	($1

Filter and Column Definitions

Click the drop-downs below for filter and column descriptions.

Default Filters

Custom Filters

Report Data