

Advanced Reports

For Magento 2



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Getting Around

Magento 2 Advanced Reports provides a comprehensive overview of a web store performance. The data reported comes via 10 report widgets and 12 reports made against a variety of metrics. The data reported can be compared/contrasted by various time periods, furthermore it can be sorted by specific customer segments. Each report reflects a specific aspect of performance of the store at a varying level of elaboration. The reports can be viewed and emailed, due mailing schedule arranged.

Compatibility: Magento Open Source 2.3.X - 2.4.X, Magento Commerce using on-prem (EE) 2.3.X - 2.4.X, Magento Commerce on Cloud (ECE) 2.3.X - 2.4.X.

For support please contact: awsupport@aheadworks.com

Introducing Advanced Reports

Available Reports

To help reflect on the performance of a store **Magento 2 Advanced Reports** suggests 12 reports, 4 general and 8 detailed.

General Reports

- **Sales Overview** shows cumulative essentials on orders placed within the given period;
- **Traffic and Conversion** lists conversion rates (ratios of unique visitors to orders they placed) against the given periods;
- **Abandoned Carts** introduces cart abandonment statistics;
- **Customer Sales** suggests details on purchases within the given sales ranges.

Detailed Reports

- **Product Performance** – a sales-per-product report;
- **Sales Detailed** - a sales-per-order report;
- **Sales by Category** – a sales-per-category report;

- **Sales by Product Attributes** - a sales-by-attribute (set of attributes) report (only attributes with the 'Use for Promo Rule Conditions' option enabled are processed);
- **Sales by Location** - a sales-by-location report (helps identify new promotional campaigns);
- **Sales by Coupon Code** – a sales-by-discount report;
- **Sales by Payment Type** – a sales-by-payment type report to tell the number of orders placed and items ordered per payment method;
- **Sales by Manufacturer** – a sales-by-manufacturer report to analyze sales perspectives per manufacturer.

Key-Features

Advanced Reports is totally a backend module. The module facilitates store admins with comprehensive statistics on various aspects of their store performance. Each aspect is reflected upon in a report. The reports are accessible from either the menu or dashboard. The dashboard furthermore allows for comparison and contrast of data with regard to the given time period. The period is set with the help of the advanced calendar.

The extension allows configuring reports both in bulk and individually. Configuration includes settings for scheduled emailing of reports or their parts. Emailing could be done to multiple addresses.

What's New?

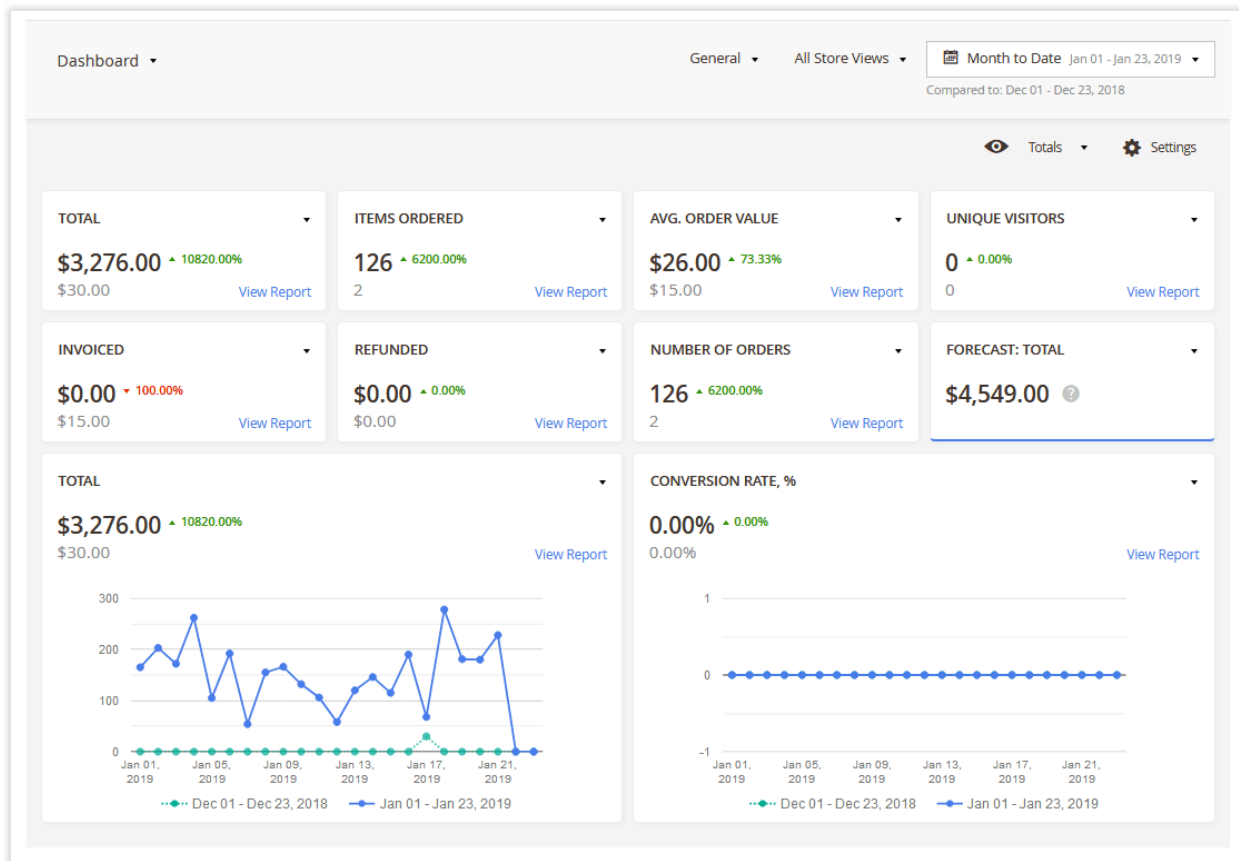
The present version of the extension (2.8.0) extends the number of performance indices within the Sales Detailed report to 45, including those of shipping and billing. Furthermore, the calendar now features the Latest Quarter parameter. On top of everything, scheduled emailing was added as a key-feature.

Using Advanced Reports

Report Dashboard

Dashboard Layout

The dashboard shows 10 configurable widgets to reflect on the overall performance of the store.



The widgets come as **8 numeric and 2 chart ones**. Each widget has the following elements:

- **Name** - performance indicator (clickable);
- **Total (in bold)** - the total \$, # or % of the index as of the current period (see below for details);
- **Total (faded out)** - the total of the index as of the previous period (see below for details);

- **Increment** (green) - the ratio between the two totals / decrement (red);
- **View Report** - an active link to the full report.

The increment comes in % by default. Hover the mouse cursor over the increment to see absolute values.

In addition to the above, the chart widgets will show relevant trends (for example, conversion rate by time period) and legends telling the time periods in comparison. Hovering the cursor over the trend milestones will show a popup telling the value of the X time-line in that point of time (day, month or other augment).

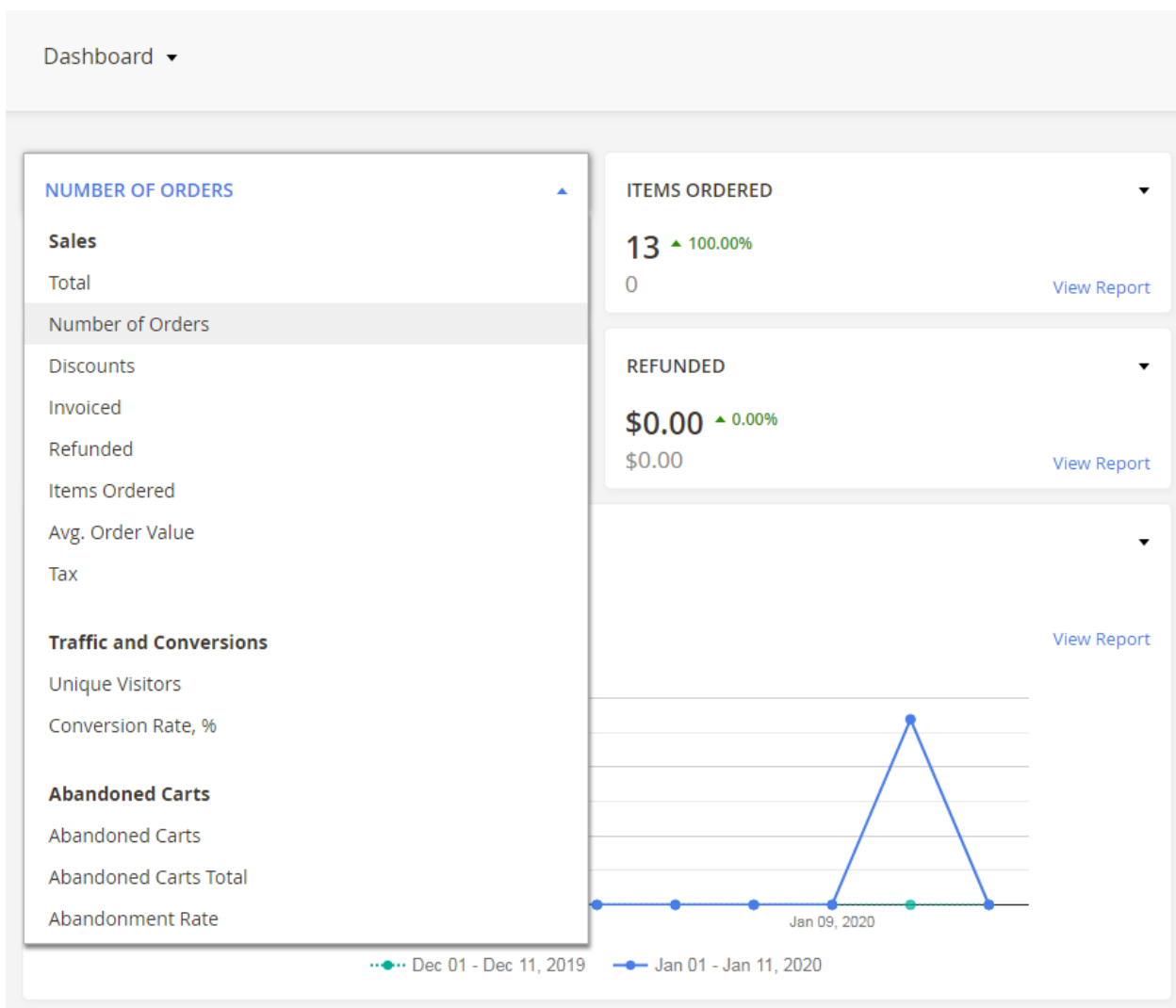
Finally, the dashboard has a **set of filters** (see top of the page). You can track the performance of a selected customer group and/or store view.

Changing widget content

The module enables changing the content of the widgets. To do so, click on the name of the widget. A folding list will appear showing three categories of indices available for display. The indices and categories are as follows in the table below.

Sales	Traffic and Conversions	Abandoned Carts
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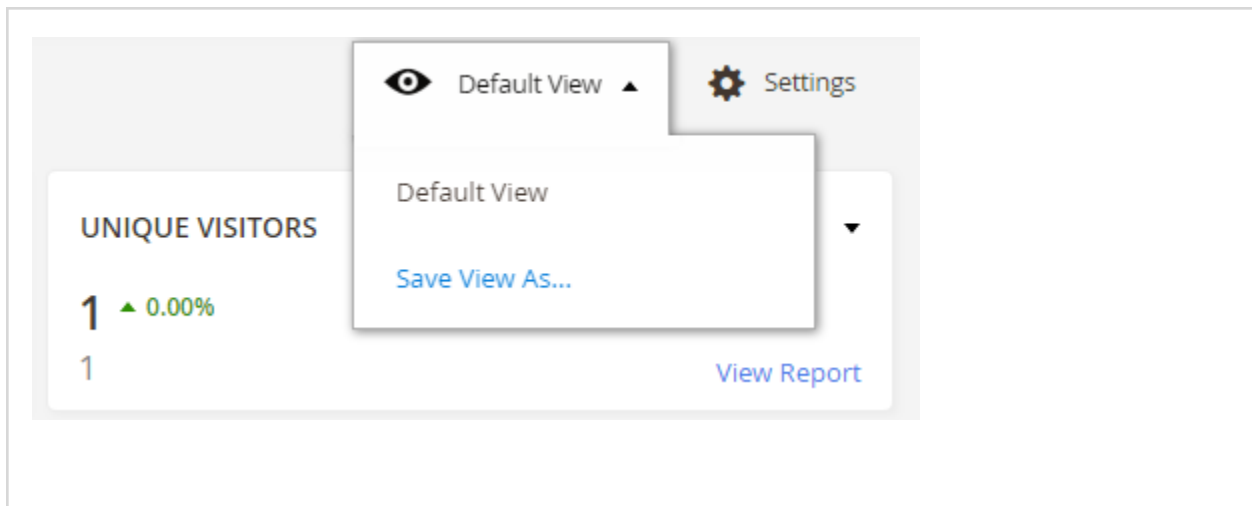
<ul style="list-style-type: none">● Total● Number of Orders● Discounts● Invoiced● Refunded● Items Ordered● Avg. Order Value● Tax	<ul style="list-style-type: none">● Unique Visitors● Conversion Rate, %	<ul style="list-style-type: none">● Abandoned Carts● Abandoned Carts Total● Abandonment Rate
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On choice of an index the widget will update its data.

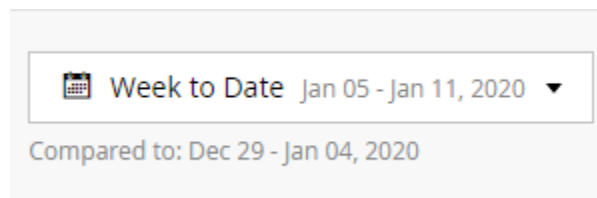
The content of the widgets is saved automatically, so you will not need to configure the widgets every time you enter the dashboard page.

You can **save several dashboard views as bookmarks** and later switch between them with the help of the **View block** in the top right.



Setting Comparison Period

The dashboard presents data in comparison and contrast. To set the periods for statistical comparison refer to the Comparison Period Block in the top right.



The block comes as a dropdown with the following options:

- **Today**
- **Yesterday**
- **Week to Date**
- **Last 7 Days**
- **Last Week (Sun - Sat)**
- **Last Business Week (Mon - Fri)**
- **Month to Date**
- **Last Month**
- **Last Quarter.**

On choice of the current period the period for comparison will be set automatically one step back. For example, Today will be compared to Yesterday, Yesterday to the day before, and so on.

Advanced Reports also allows for **setting custom periods for comparison**. This feature is only available in the Calendar, which in turn is only available on the pages of the reports, not on the Dashboard page.

The Calendar features an additional list of options for comparison above - "**Custom Date Range**". On enabling this option, either type-in the dates in the date fields, or select the dates on the calendar tables to the left. **To set a custom comparison period**, activate the checkbox next to the "Compare to" feature and select '**Custom**' in the drop list. The date range fields will then become active. Type-in the dates in the comparison date fields, or select the dates on the calendar tables to the left.

The screenshot shows a user interface for setting a custom date range for comparison. At the top, it displays "All Store Views" and the current date range "Aug 30, 2016 - Sep 24, 2016". Below this, there are two calendar grids: one for 2016 (showing Th, Fr, Sa) and one for DECEMBER 2016 (showing Su, Mo, Tu, We, Th, Fr, Sa). To the right of the calendars, there is a "Date Range:" dropdown menu set to "Custom date range". Below this, there are two date input fields: "Aug 30, 2016" and "Sep 24, 2016". A checkbox labeled "Compare to:" is checked, and its dropdown menu is set to "Custom". Below this, there are two more date input fields: "Sep 25, 2016" (highlighted with an orange border) and "Oct 30, 2016". At the bottom, there are two buttons: "Apply" (blue) and "Cancel" (grey).

The choice of the time period will be saved automatically on page reload or when surfing to another page.

Performance Reports

Report Layout

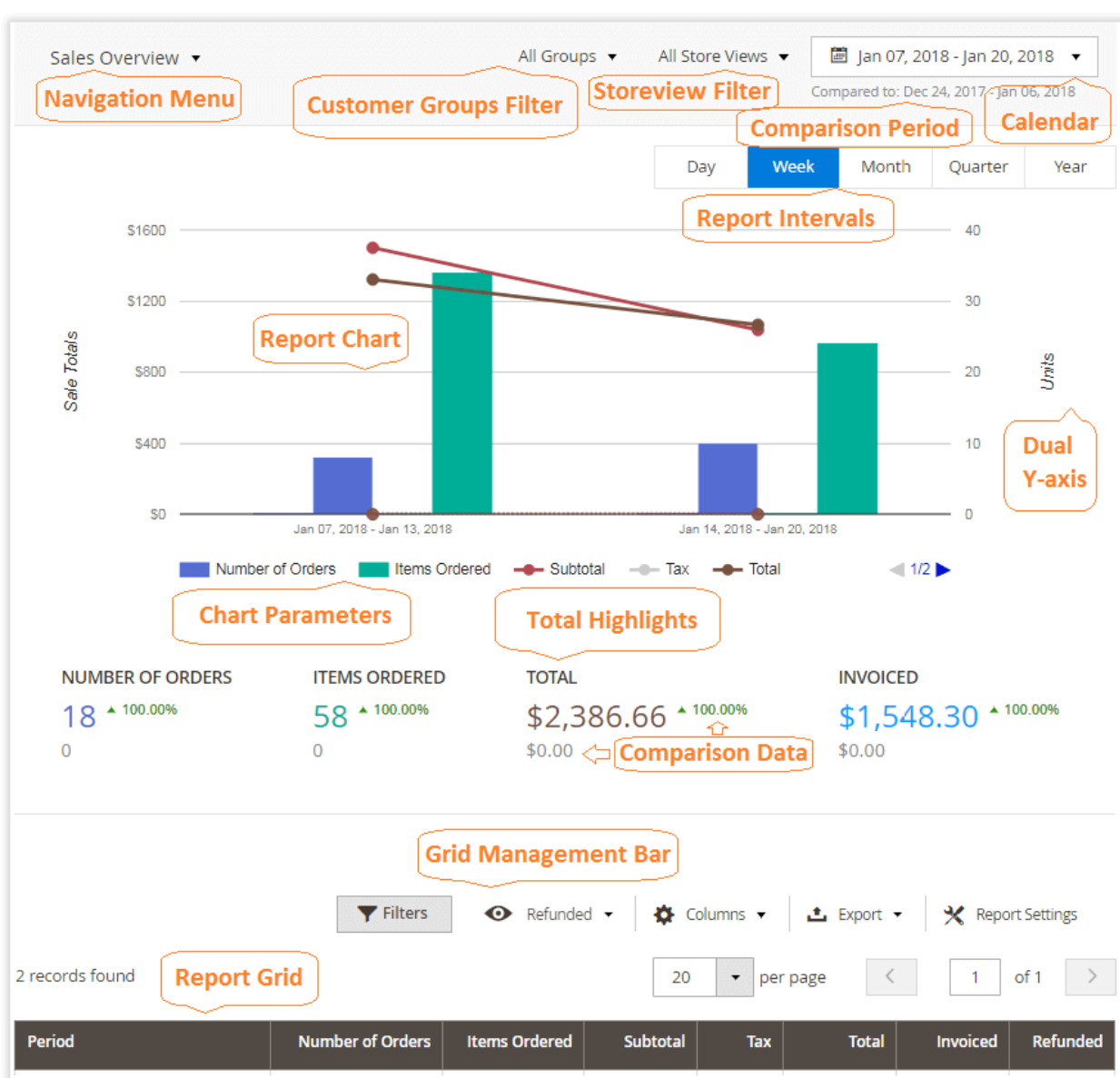
To get access to the reports go to **Reports > Advanced Reports by Aheadworks**. Alternatively, should you find yourself on the Dashboard page click the View Report active link on the widget (see Dashboard Layout above). Finally, you may employ the Navigation menu.

Generally, each report page has the following elements:

- **Navigation menu** – used for quick navigation within the extension. With the help of the navigation menu, you can switch to the required report.
- **Calendar** – used to set the period for reporting. It comes with the same predefined reporting periods as the report dashboard. Setting custom comparison periods is also possible.
- **Report intervals** – used to quickly group the data reported by the one of the four periods: day, week, month, quarter and year;

You can generate a report from a whole month's data (1st to 31st) and then group it by day (31 entry – day-by-day sales), week (5 entries – week total sales), or month (1 entry – month sales total).

- **Report chart** – used to present sales data in a visual form;
- **Chart parameters** - these represent the legend for the visualization;
- **Dual Y-axis** - two-axis charts present data against the two prearranged key-indices, thereby they are twice more informative;
- **Totals block** - represents the totals for quick examination;
- **Report grid** – represents the data built against the period defined in the calendar;
- **Filters and report grid adjustments** - represent a set of filters, including Customer Group, Segment, Store View, as well as some other tools for filtering and arranging reports



For more convenience, the generated reports can be later exported to *.csv or *.xml tables with the help of the 'Export' button above the report grid.

Generating a Report

The extension comes with 12 reports each covering a specific aspect of performance of the store. To generate a report, take the following steps:

Step 1 - Select the required report from the list (go to **Reports > Advanced Reports by Aheadworks**).

Step 2 - Use the calendar to select the required report date range and click the 'Apply' button.

Step 3 - The report is generated. Now, you can adjust the period for reporting and data grouping to get the required presentation. Adjust filters if necessary.

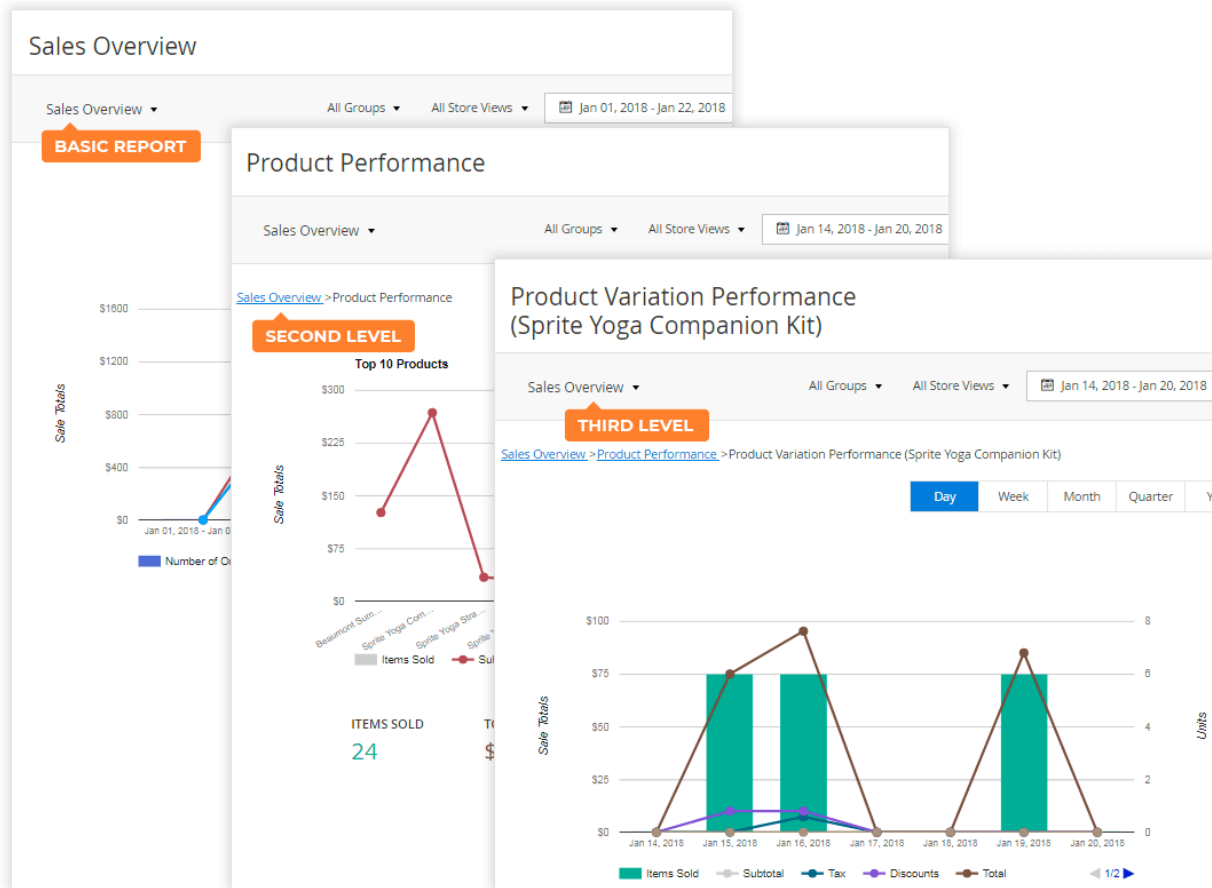
Step 4 - Once the required filters are selected, save the current view by expanding the 'Default View' box and clicking **Save view as**.

The saved view will be available on all Advanced Reports pages. It can be recalled anytime you make changes to the filters or the report grid.

Report Drill-down

All reports are interconnected. It means that you can consecutively get a deeper picture of the report subject matter.

Taking the '**Sales Overview**' report as a starting point, you can navigate to a '**Product Performance**' report by clicking on an entry in the report grid. Next, clicking on the entry in the '**Product Performance**' report will take you to an '**Individual Product Performance**' report page.



You can use the breadcrumb trail above each report chart to navigate the sequence of reports.

The available drill-down scenarios are as follows:

- Sales Overview > Product Performance;
- Product Performance > Product Variant Performance;
- Sales by Category > Product Performance;
- Sales by Coupon Code > Sales Overview;
- Sales by Payment Type > Sales Overview;
- Sales by Manufacturer > Product Performance;
- Traffic and Conversions > Product Conversion >
- Sales by Location > Sales by State/Region > Sales by City/Place.

Configuring Reports

To configure the report, click on the Report Settings option in the Grid Management Bar.

Original Name	Custom Name	Export To Email
Order #	<input type="text"/>	<input checked="" type="checkbox"/>
Order Status	<input type="text"/>	<input checked="" type="checkbox"/>

A popover will appear, suggesting two blocks for customization: **Order Statuses** and **Report Configuration**.

The former comes as a list of **order statuses** available for selection. Only orders of selected herein statuses will be the sources of data for the given report. By default the list is disabled, the values set for all reports on the Extension Settings page are used. Disable the checkbox next to the 'Use Default Value' to customize the list of statuses.

The **Report Configuration** block allows for columns customization. You can substitute the default names of the report columns with your text, and also to decide whether data in these columns are to be exported to emails (see the checkbox next to the column name).

The Customer Sales and Sales Detailed reports will also feature the **Include Refunded** Items toggle. This option is meaningful only for these two reports, and thereby is not available for other.

Extension Settings

The general settings of the extension can be accessed from **Stores > Configuration > AHEADWORKS EXTENSIONS > Advanced Reports**.

The Settings page comes in two blocks: General Settings and Scheduled Email Reports.

General Settings

The General Settings block allows tweaking **Order Statuses**, **Ranges**, and **Manufacturer Attribute**.

The screenshot shows the 'Configuration' page in the Aheadworks system. The left sidebar contains navigation icons for Dashboard, Sales, Security, Customers, Aheadworks Extensions, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'General Settings' and includes a 'Save Config' button in the top right. The 'Order Statuses' dropdown is expanded, showing a list of status options: 'Company Pending Approval', 'Rejected by Company Admin', 'Canceled', 'Closed', and 'Complete'. Below this is the 'Ranges' table, which has columns for 'From', 'To', and 'Action'. The table contains four rows of price ranges: 0.00 to 99.99, 100.00 to 249.99, 250.00 to 999.99, and 1000.00 to an empty field. An 'Add' button is located below the table. Further down, the 'Manufacturer Attribute' dropdown is set to 'Manufacturer', and the 'Google Maps API Key' field is empty. A help icon is present next to the Google Maps API Key field, with a tooltip explaining its purpose.

- **Order Statuses** - select orders to provide data for the reports. By default, only **'Complete'** orders will be processed.

If required, you can select multiple order statuses using either of the two hot-keys: press Shift, hold Right Button, select to select a group of orders or press CTR, click the right button to select order statuses one by one.

Specifying order statuses herein will extend the selection over all the reports. See Configuring Reports above for individual configuration of reports.

- **Price Ranges** - set price ranges to be used by the **'Customer Sales'** report.
- **Manufacturer Attribute** - the product attribute to be used as the key parameter within the **'Sales by Manufacturer'** report. The dropdown lists the following options: **'Manufacturer'**, **'Color'**, **'Size'**, and **'Format'**.
- **Google Maps API Key** - set it up to provide the correct work of Geo chart Sales by Location report.

If you don't have a valid Google Maps API Key follow the link to get detailed instructions on its creation.

There are two API's you have to enable in the APIs tab Google Cloud Platform for

the correct work of the extension:

- Maps JavaScript API,
- Geocoding API.

To verify these settings, please follow the link.

Once done, click **Save Config** in the top right of the page, or proceed to the next step.

Scheduled Emailing

As of version 2.8.0 Advanced Reports allows scheduling emails containing reports. It is possible to send full reports or parts of thereof. Furthermore, the extension supports multi-address mailing.

The **Scheduled Email Reports** block of the Settings page contains the following configuration options:

- **Reports to export** - a list of all available in the extension reports (multiselect is possible)
- **Recipients** - email addresses of the recipients (separate addresses with a comma)
- **When to send** - trigger event for email dispatch (select one of the three: first day of a week/month/quarter)

- **Group by** - grouping criteria (select one of the five: day/week/month/quarter/year)
- **Email Template** - selection of email templates (AW Advanced Reports - Scheduled Email Report by default)
- **Report Format** - a format of the attachment document to contain the report (Excel XML or CSV)
- **Email sender** - a selection of email senders as configured in the store.

Leave the Recipients field blank to disable scheduled emailing of reports.

Once done, click **Save Config** in the top right of the page.

Report Indexes

Starting from version 2.0.0, the extension introduces report indexes which facilitate faster data load, a period for reporting specified.

Report indexing eliminates the need for report generation on demand. Basically, the reports are generated once a day (or more frequently depending on the cron settings). Post-generated results are loaded when you open a report.

Report indexing is particularly useful for busy stores processing large numbers of orders. For example, it should not take more than a couple of minutes to reindex ~200k orders on a decent server hardware. Considerable lags on reports generation may occur otherwise.

How to index reports?

As it was mentioned above, the reports are indexed automatically depending on your store cron setup. By default, cron runs once a day, meaning that the data reported will always be up-to-date.

You can always run reindexing manually, however, it involves console usage.

Once reindexing is done, the reports will feature the latest data.

Will the Advanced Reports extension process those orders which were placed before the installation?

Yes, the Advanced Reports extension will index ALL orders which have been placed in the store.

With the release of version 2.7.0, the database is not blocked (as it used to be in the previous versions) when reindexation of the module is run.

Troubleshooting

I have deleted the product. Will it impact the reports?

If the product was deleted, the '**Product Performance**' report will erase the SKUs of the product from the order table. It means that configurable products and products with custom options will have their SKUs marked as '**product was deleted**'. The deleted products will not impact the report performance or the data generated.

I can't see the attribute in the 'Sales by Attributes' report!

Make sure you have enabled the '**Use for Promo Rule Conditions**' option for the attribute you cannot find in the report. If required, refresh cache and reload the page.

Why can I not see some configurable and bundle products in the 'Sales by Attributes' report?

It depends on whether you have set a dynamic or fixed price for the corresponding configurable and/or bundle products.

- **If you have set dynamic prices** - only child products will be considered while building the report;
- **If you have set fixed prices** - both parent and child products will be considered while building the report.

Why does the Geo chart work incorrectly?

If the **Geo Chart from Sales by Location report** works incorrectly and there will be errors in the console such as **“Geocoding Service: You must use an API key to authenticate each request to Google Maps Platform APIs.”**

- Verify the Google Maps API Key setting and if the key no valid or unset follow Stores > Configuration > Aheadworks Extensions >Advanced Reports > General Settings > Google Maps API Key to get and configured it.
- Make sure you have enabled “Maps JavaScript API and Geocoding API” in the APIs tab Google Cloud Platform.

Please use this page to get a detailed guide to creating a Google Maps API Key.

How are profit values calculated in the 'Product Performance' report?

Total revenue, cost, profit, and margin are calculated in accordance to the following formulae:

Total Revenue (excl. Tax)

Total Revenue (excl. Tax) = sum for each item (Item final price * Qty sold - Taxes - Total discount)

Total Cost

Taken from the order, not from the current product attribute value

Total Profit

Total Profit = Total Revenue (excl. Tax) - Total Cost

Total Margin

Total Margin = (Total Profit / Total Revenue (excl. Tax)) * 100

For an in-depth look visit Advanced Reports demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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