amasty

For more details see how the Advanced Reports for Magento 2 extension works.

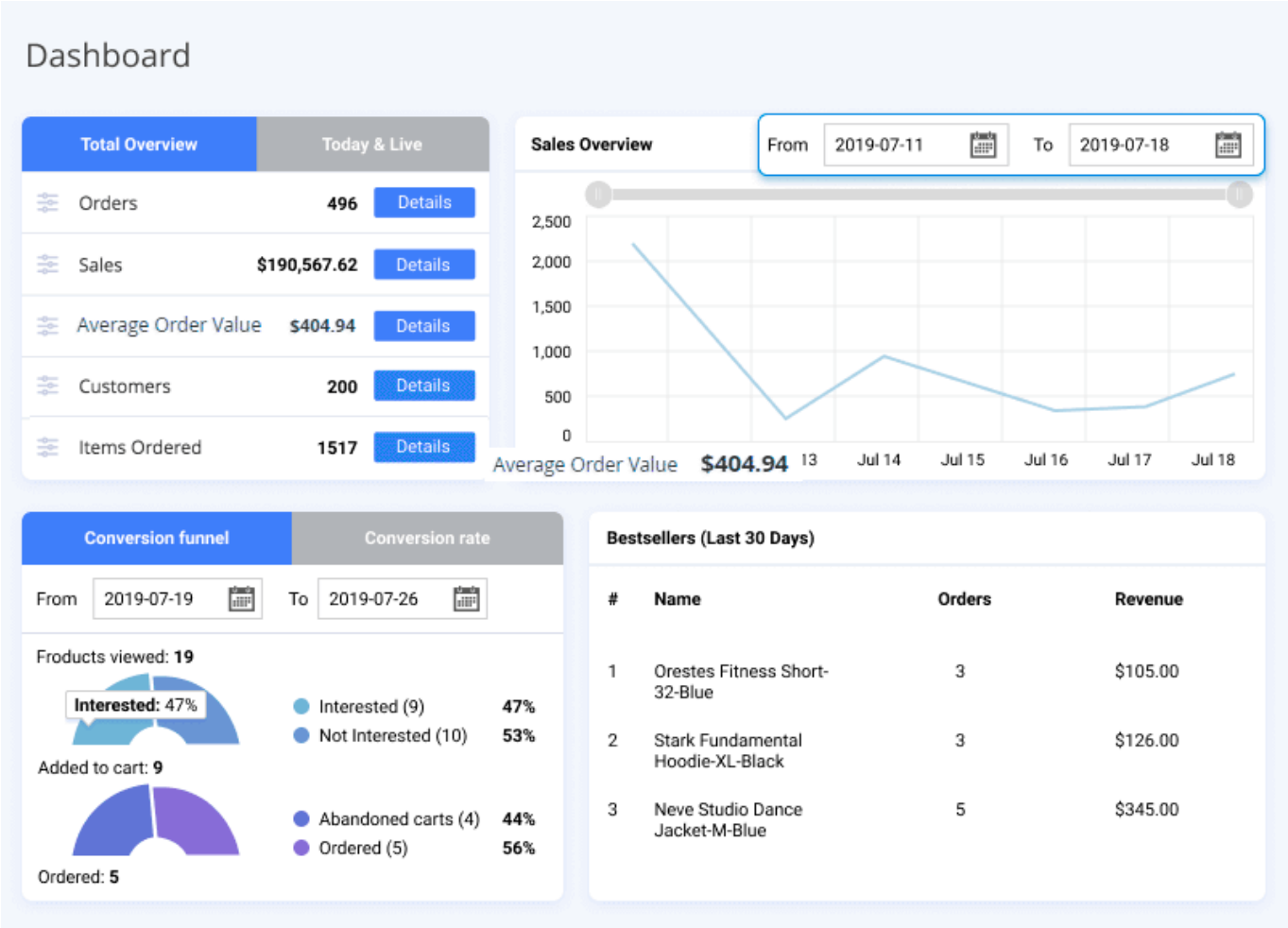
Guide for Advanced Reports for Magento 2

Using advanced reports, you can significantly widen your analytical opportunities. Gather and process important statistical data to produce an efficient marketing strategy.

- Get 20+ ready-made essential e-commerce reports
- Have all key metrics at hand on the informative dashboard
- Analyze sales dynamics comparing different periods
- Track your sales performance in real time
- Build an unlimited number of custom reports
- Use multiple filters for each report type

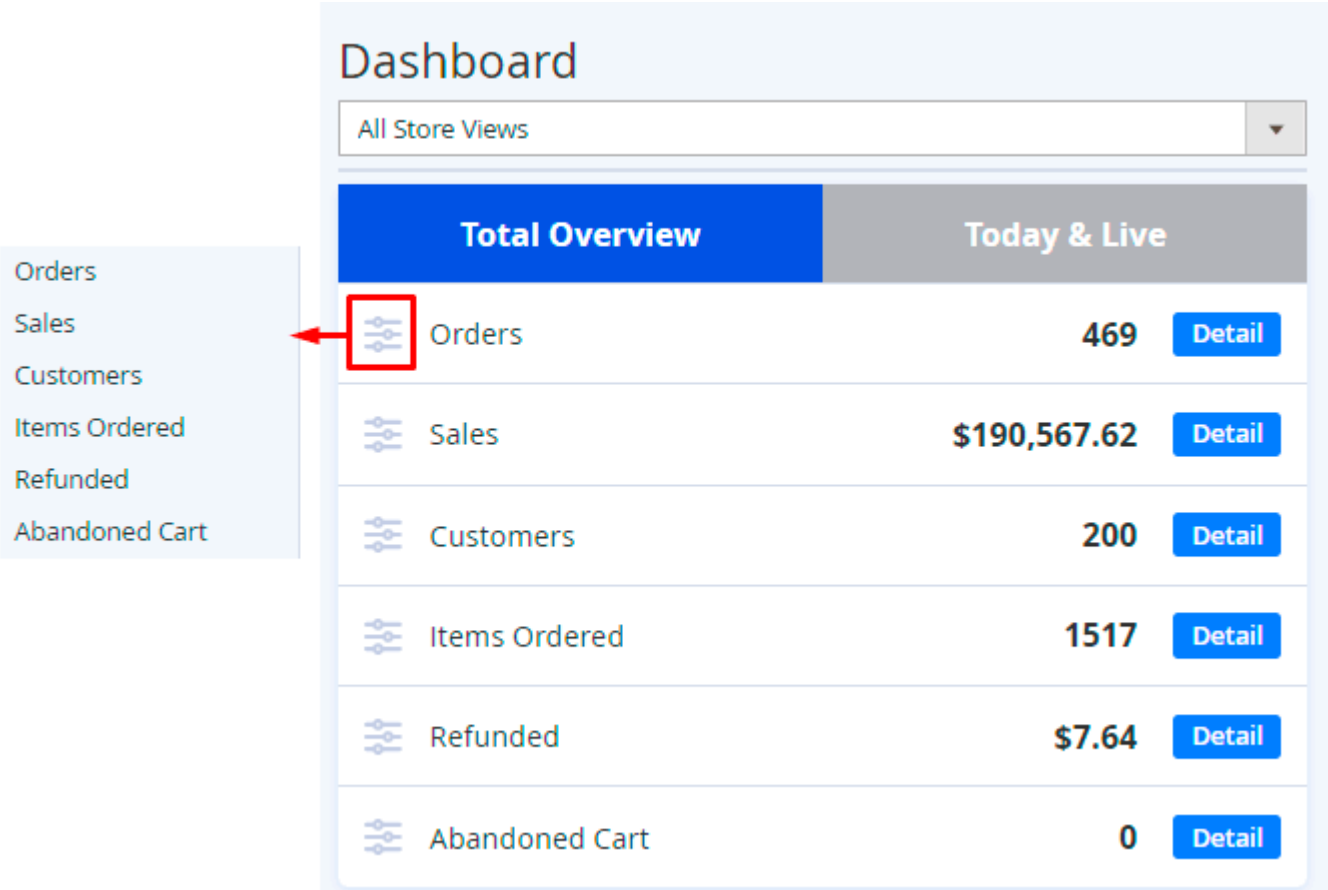
Dashboard

Have key metrics at hand, placing widgets with the most significant stats in the reports dashboard. You can find the Advanced Reports Dashboard by going to **Reports → Advanced Reports** in the Magento 2 admin panel.

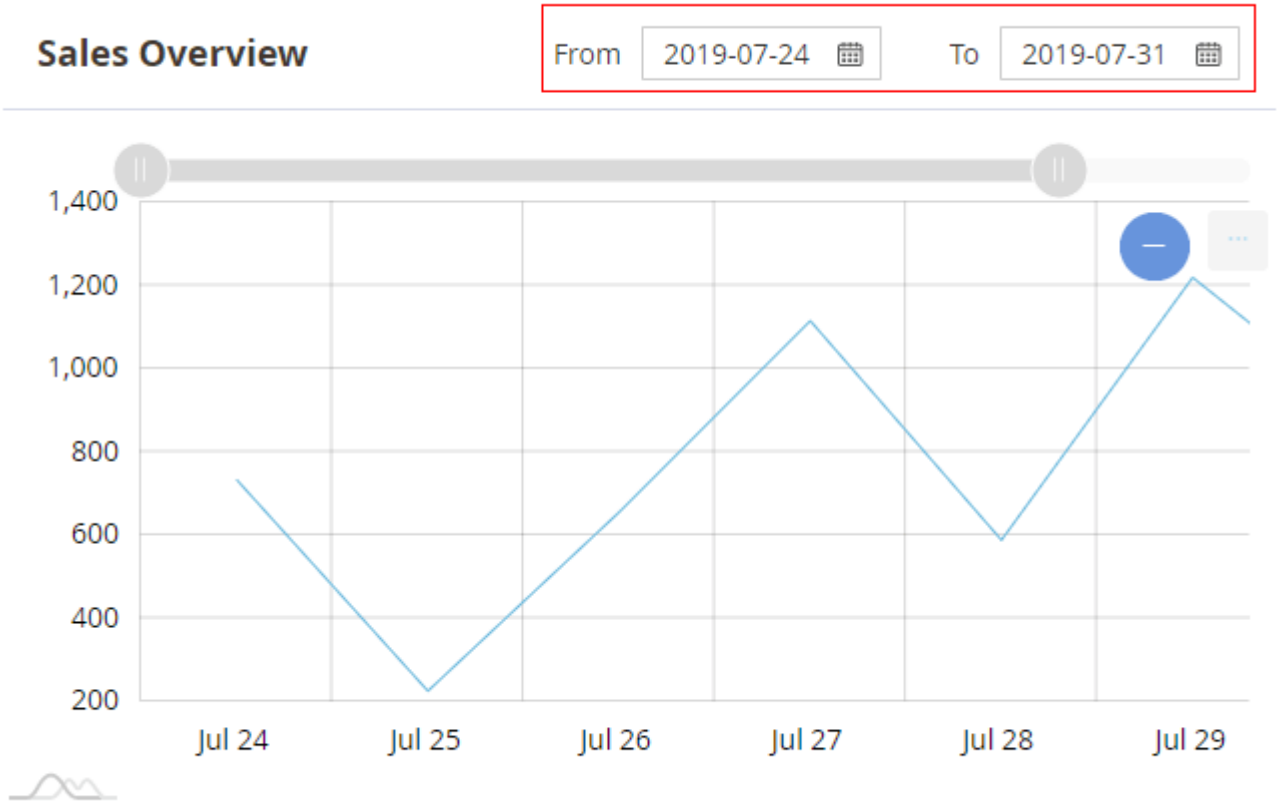


To configure the Reports Dashboard, please, do the following:

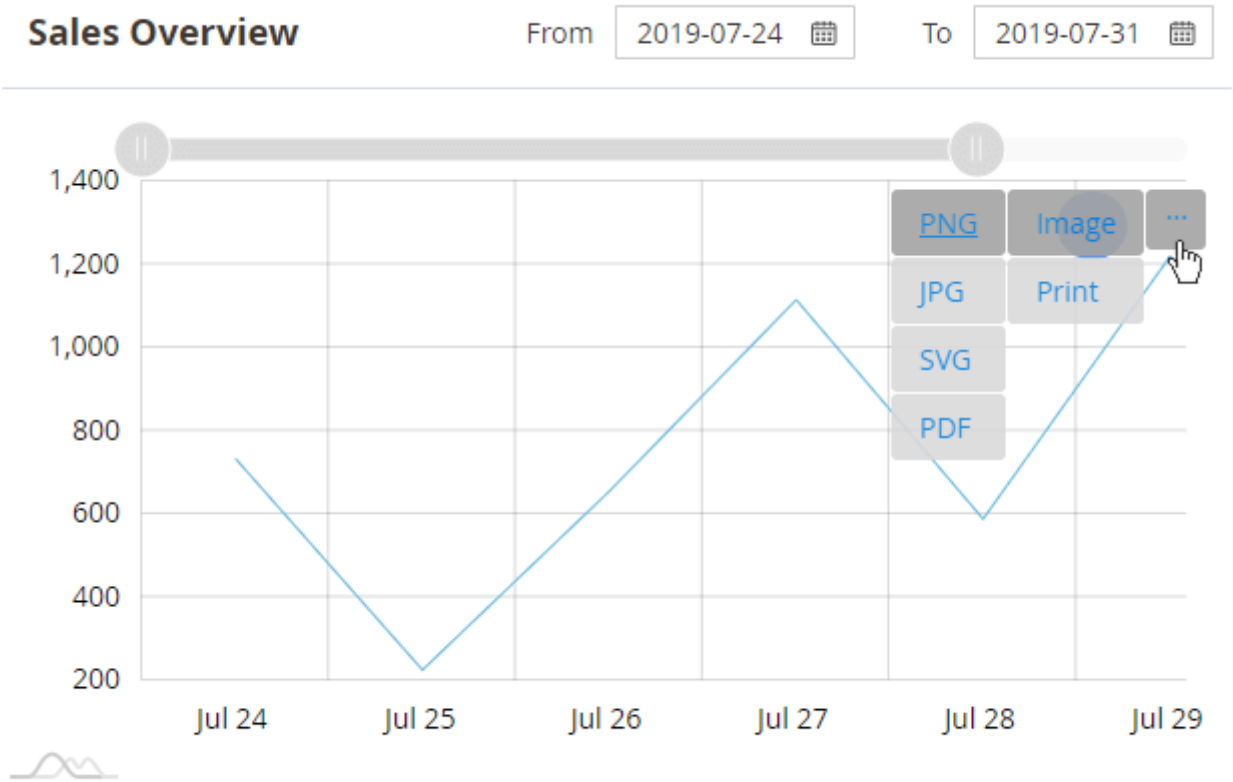
- Select the most important report parameters that will be displayed on the top bar. Press the *Settings* icon to see a popup dropdown with all the available parameters. Choose the parameters you want to be displayed right from the dashboard start.
- Press *Details* to see more specific data for each particular parameter.
- Check **Today & Live** block on the dashboard to see what is going on in your store right now.



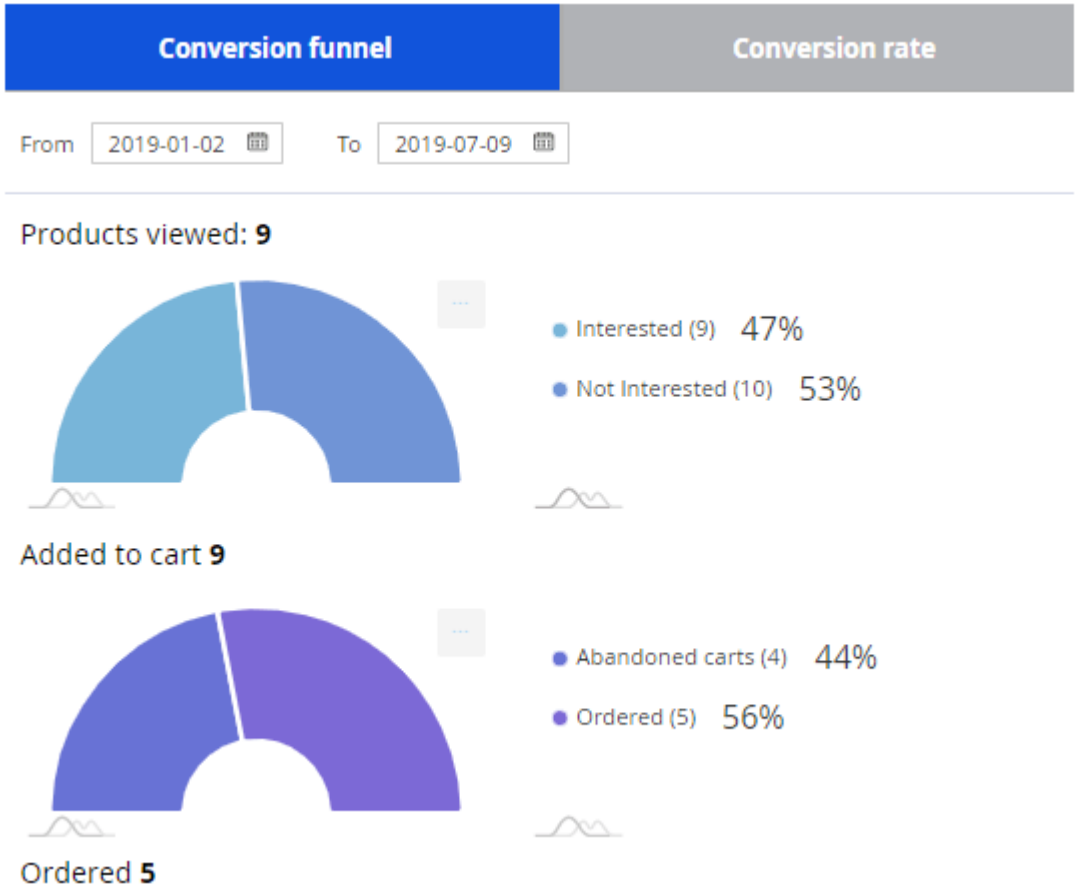
- Specify the time interval for a *Sales overview* graph. Select a particular month and year from dropdowns, pick a day from the grid and the data will be updated automatically. Otherwise, input a date manually in the *From* and *To* fields and press *Enter*.
- Use slider to have more detailed view on particular data.



You can easily save any of your charts as images in PNG, JPG, SVG and PDF format. Also, you can print it if needed.



- Set the time period for a *Conversion funnel* and a *Conversion Rate*.



- See the *Bestsellers* list.

Bestsellers (Last 30 days)

#	Name	Orders	Revenue
1	Geo Insulated Jogging Pant-34-Blue	8	$408.00
2	Stark Fundamental Hoodie-XL-Black	3	$126.00
3	Jupiter All-Weather Trainer -M-Blue	5	$284.95
4	Ryker LumaTech™ Tee (V-neck)-L-Black	2	$56.00
5	Hyperion Elements Jacket-L-Green	4	$204.00
6	Primo Endurance Tank-M-Blue	4	$116.00
7	Layla Tee-XS-Red	4	$116.00
8	Aero Daily Fitness Tee-L-Black	4	$96.00
9	Miko Pullover Hoodie-XL-Orange	2	$138.00
10	Hyperion Elements Jacket-XL-Green	2	$102.00

- View *Last order*'s details on a grid.

Last order

Order	Customer	Status	Date	Items	Grand Total
#000000324	Jhon_53 Deo_53	pending	2019-11-04 14:38:11	5	$508.40
#000000211	Jhon_25 Deo_25	pending	2019-11-04 14:36:19	3	$309.40
#000000165	Jhon_13 Deo_13	pending	2019-11-04 14:35:39	3	$528.77
#000000160	Jhon_12 Deo_12	pending	2019-11-03 14:35:35	3	$490.20
#000000316	Jhon_51 Deo_51	pending	2019-11-02 14:38:02	5	$653.00
#000000032	Jhon_0 Deo_0	pending	2019-10-31 15:12:45	4	$399.80
#000000410	Jhon_60 Deo_60	pending	2019-10-30 14:41:37	4	$329.20
#000000318	Jhon_52 Deo_52	pending	2019-10-27 14:38:04	4	$694.60
#000000038	Jhon_0 Deo_0	pending	2019-10-25 15:13:02	4	$527.40
#000000011	Jhon_0 Deo_0	pending	2019-10-23 15:11:23	2	$369.60

Configuration

To choose order statuses you want to be used in all Sales Reports, please, go to **Amasty → Advanced Reports → Configuration**.

General

Order Status used in Sales Reports [global]

Canceled
Closed
Complete
Suspected Fraud
On Hold
Payment Review
PayPal Canceled Reversal
PayPal Reversed
Pending
Pending Payment
Pending PayPal
Processing

Please select an Order Status to be used in Sales Reports.

Product Attribute used in Brands Report [global]

brand

Please choose an attribute to be used as Brand in Brands Report.

Product Attribute used in Brands Report - choose an attribute to be used as Brand in Brands Report.

From the left navigation menu you can switch between different stats. Let's check them.

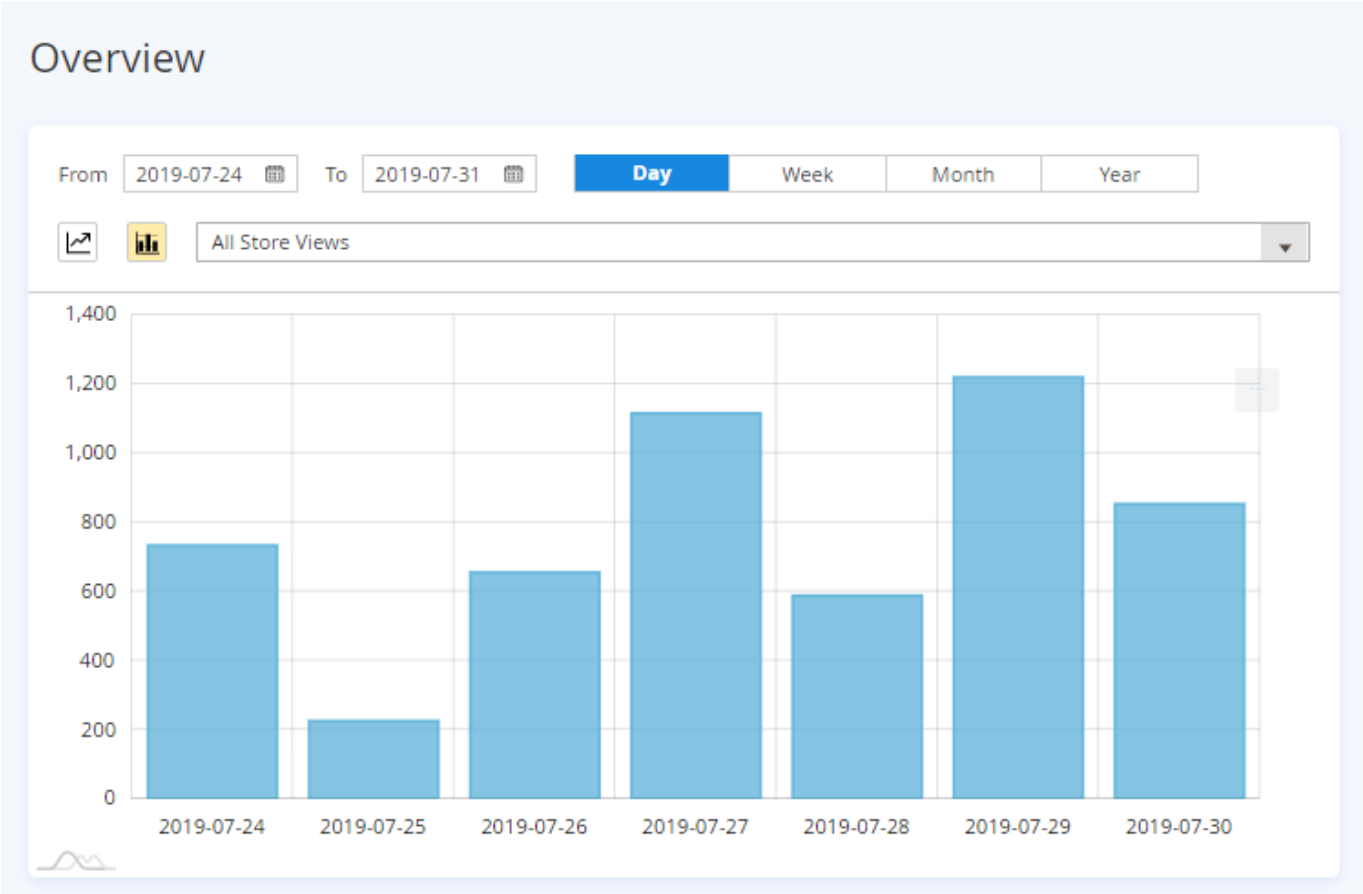
Sales and Orders

Overview

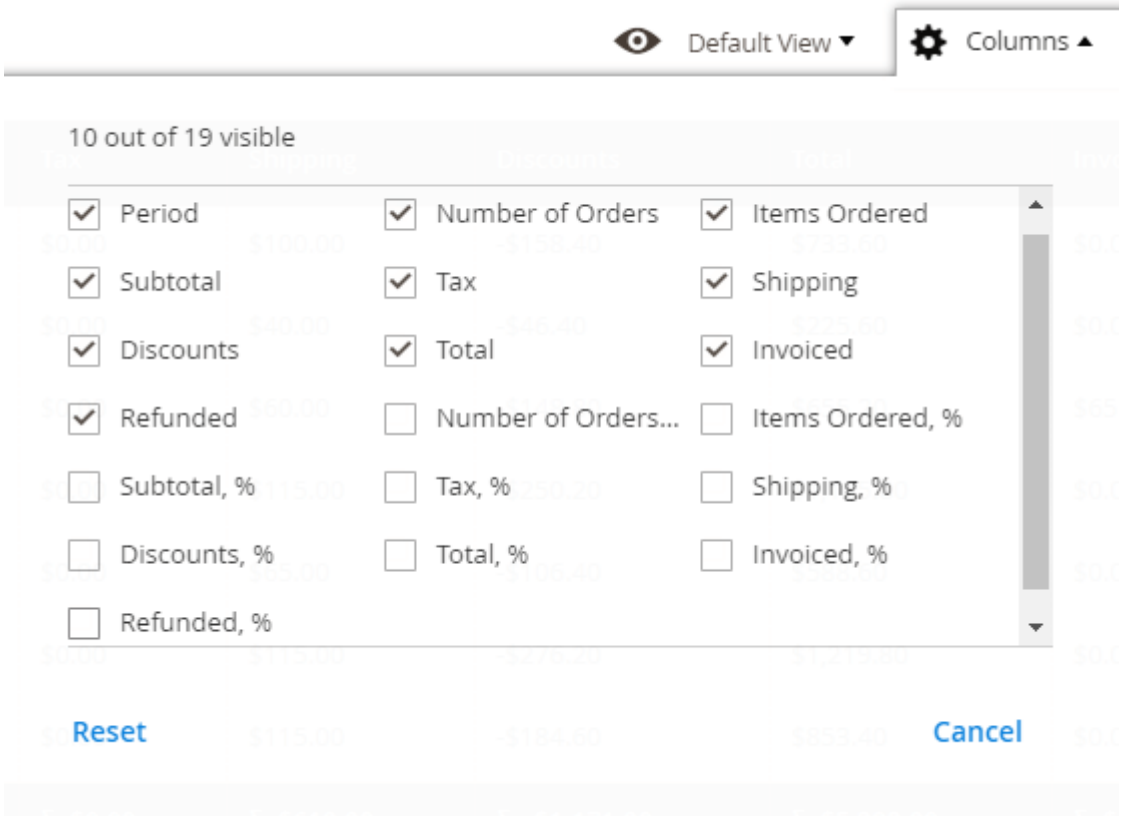
Select the time interval to view reports data.

The module displays information for the last 7 days by default.

Choose the step interval for data generation (day, week, month). Choose the way of visualization of the report: line chart or bar graph.



Columns. Manage columns for the report grid. Choose which of them should be shown in the report.



See the total value of each column in a percentage or numeric format. Export the necessary

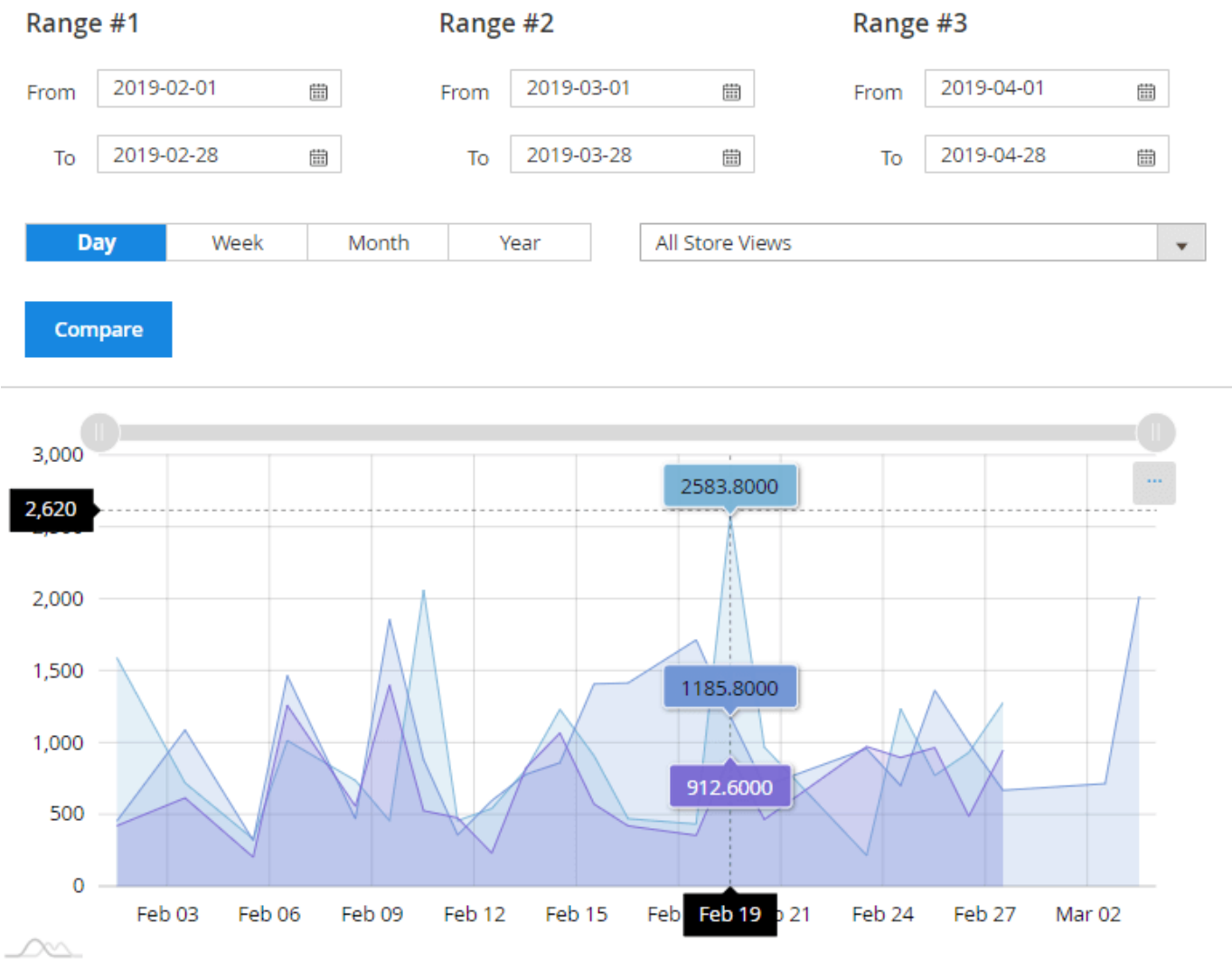
information to a CSV or XML file.

6 records found 20 per page Default View Columns Export Value Percent, %

Period	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
2019-06-05	2	6	$797.00	$0.00	$85.00	-$159.40	$722.60	$0.00	$0.00
2019-06-06	2	9	$1,487.00	$0.00	$130.00	-$297.40	$1,319.60	$0.00	$0.00
2019-06-07	3	11	$1,551.00	$0.00	$180.00	-$310.20	$1,420.80	$0.00	$0.00
2019-06-08	2	6	$639.00	$0.00	$80.00	-$127.80	$591.20	$0.00	$0.00
2019-06-09	2	8	$959.50	$0.00	$120.00	-$159.70	$919.80	$0.00	$0.00
2019-06-12	3	9	$658.68	$0.00	$65.00	-$68.40	$655.28	$122.68	$0.00
N/A	Σ: 14	Σ: 49	Σ: $6,092.18	Σ: $0.00	Σ: $660.00	Σ: -$1,122.90	Σ: $5,629.28	Σ: $122.68	Σ: $0.00

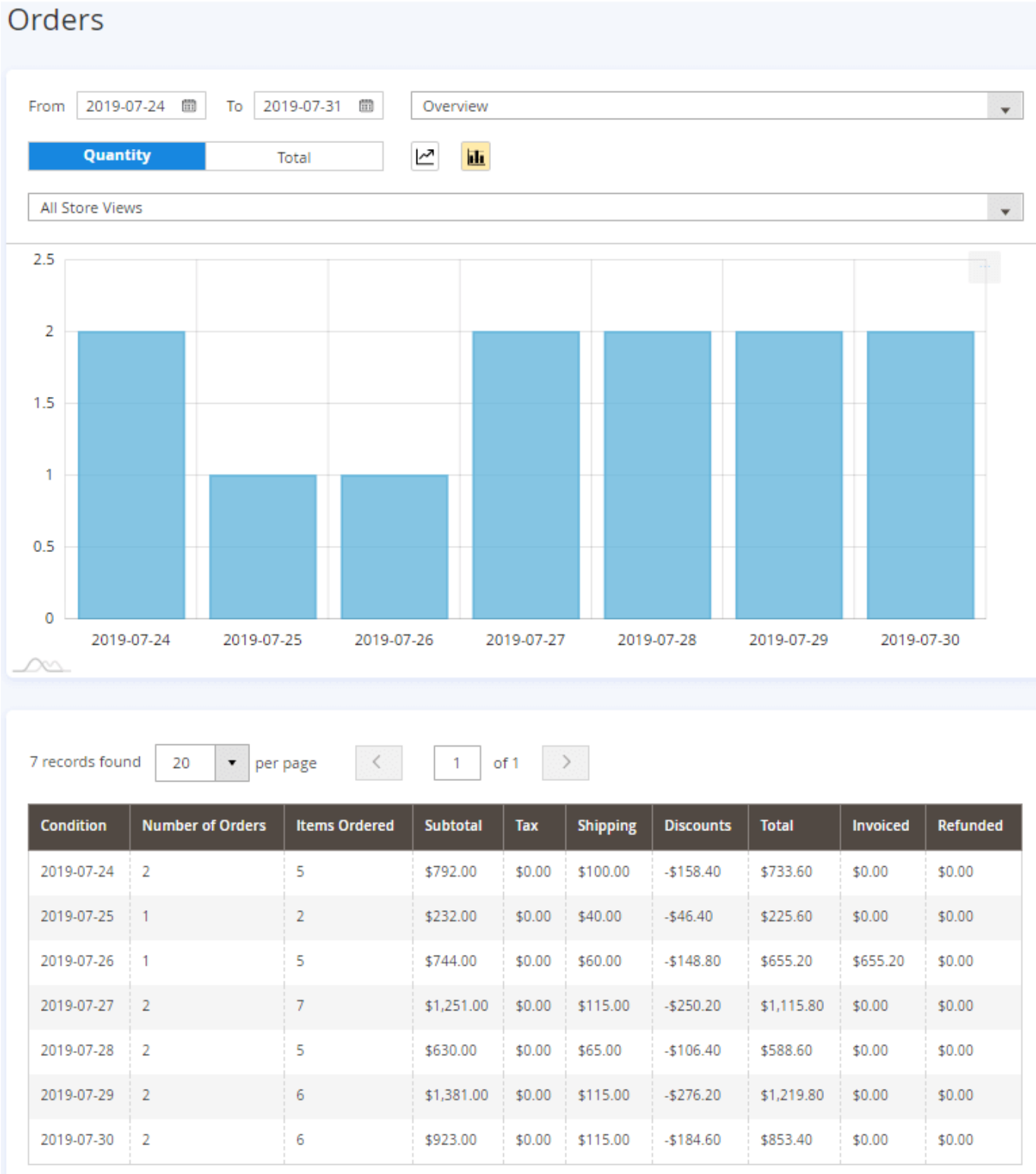
Sales Comparison

Compare sales data by custom periods with the 'Sales Comparison' report. Set several time ranges you want to compare and click the **Compare** button. You can set to compare specified periods by days, weeks, months and years. Also, you can choose a store view you want to compare sales of different periods within.



Configure Orders Report

Get a full list of orders during a specified period. The extension updates order statuses in real-time so you'll see your revenue accurately calculated. Filter stats data by the number of sold products or by the total sum paid by customers within a specific time period (**Quantity/Total**). You can also filter the orders **By Status**. Choose the way of visualization of the report: line chart or bar graph.



Condition	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
2019-07-24	2	5	$792.00	$0.00	$100.00	-$158.40	$733.60	$0.00	$0.00
2019-07-25	1	2	$232.00	$0.00	$40.00	-$46.40	$225.60	$0.00	$0.00
2019-07-26	1	5	$744.00	$0.00	$60.00	-$148.80	$655.20	$655.20	$0.00
2019-07-27	2	7	$1,251.00	$0.00	$115.00	-$250.20	$1,115.80	$0.00	$0.00
2019-07-28	2	5	$630.00	$0.00	$65.00	-$106.40	$588.60	$0.00	$0.00
2019-07-29	2	6	$1,381.00	$0.00	$115.00	-$276.20	$1,219.80	$0.00	$0.00
2019-07-30	2	6	$923.00	$0.00	$115.00	-$184.60	$853.40	$0.00	$0.00

Configure Order Items Report

View the report *By Order Items*, to see the orders split per separate products.

Order Items

From 2019-07-24 To 2019-07-31

All Store Views

20 records found 20 per page 1 of 1

Order ID	Order Status	Order Date	Payment Method	Product SKU	Product Name	Price	Qty Ordered	Subtotal	Tax	Discounts	Row Total
000000446	Processing	Jul 24, 2019 2:42:13 PM	Check / Money order	MS02-XS-Gray	Ryker LumaTech™ Tee (V-neck)-XS-Gray	$28.00	5	$140.00	$0.00	$28.00	$140.00
000000446	Processing	Jul 24, 2019 2:42:13 PM	Check / Money order	MSH01-34-Black	Cobalt CoolTech™ Fitness Short-34-Black	$44.00	4	$176.00	$0.00	$35.20	$176.00
000000373	Closed	Jul 25, 2019 2:40:03 PM	Check / Money order	MT02-XS-Gray	Tristan Endurance Tank-XS-Gray	$29.00	4	$116.00	$0.00	$23.20	$116.00
000000373	Closed	Jul 25, 2019 2:40:03 PM	Check / Money order	MT03-M-Blue	Primo Endurance Tank-M-Blue	$29.00	4	$116.00	$0.00	$23.20	$116.00
000000467	Complete	Jul 26, 2019 2:42:31 PM	Check / Money order	MS08-XS-Blue	Strike Endurance Tee-XS-Blue	$39.00	1	$39.00	$0.00	$7.80	$39.00

Sales By

Check Sales by Hour/ Week Reports

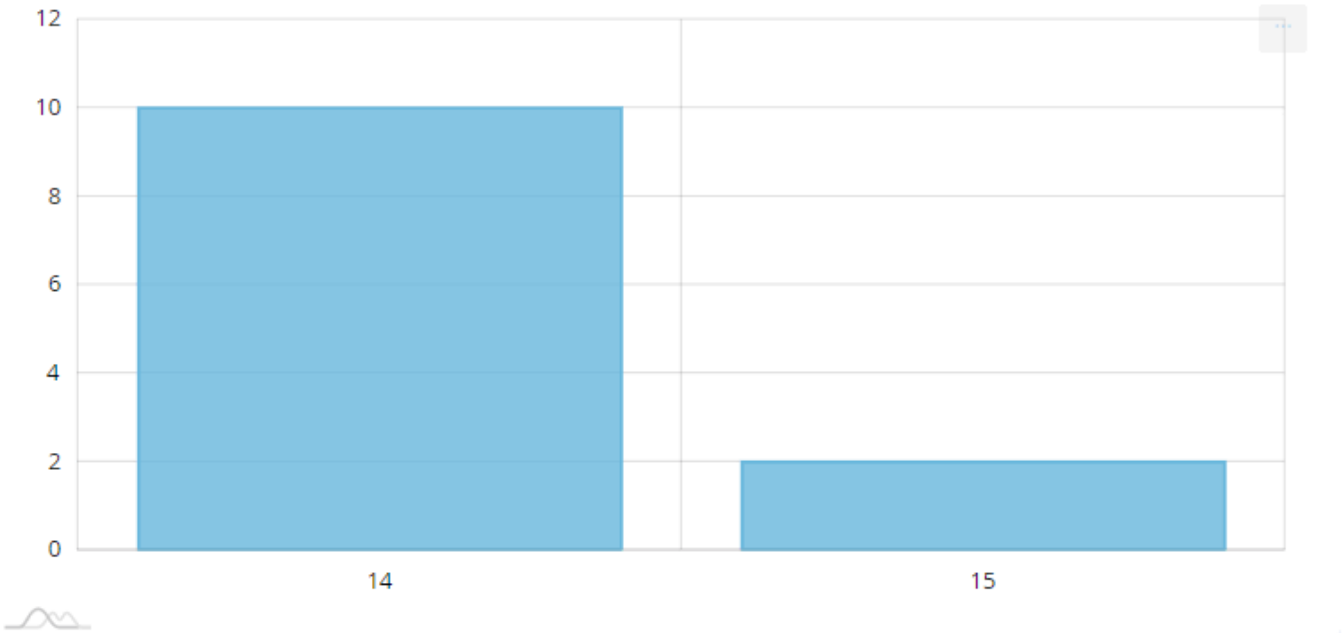
Use time-based reports to figure out which time periods (**days of the week, hours**) bring you more sales. You can filter by **Quantity** and **Total** or specify the particular **Store**.

Two reports have identical settings and can be configured in a few clicks.

Hour

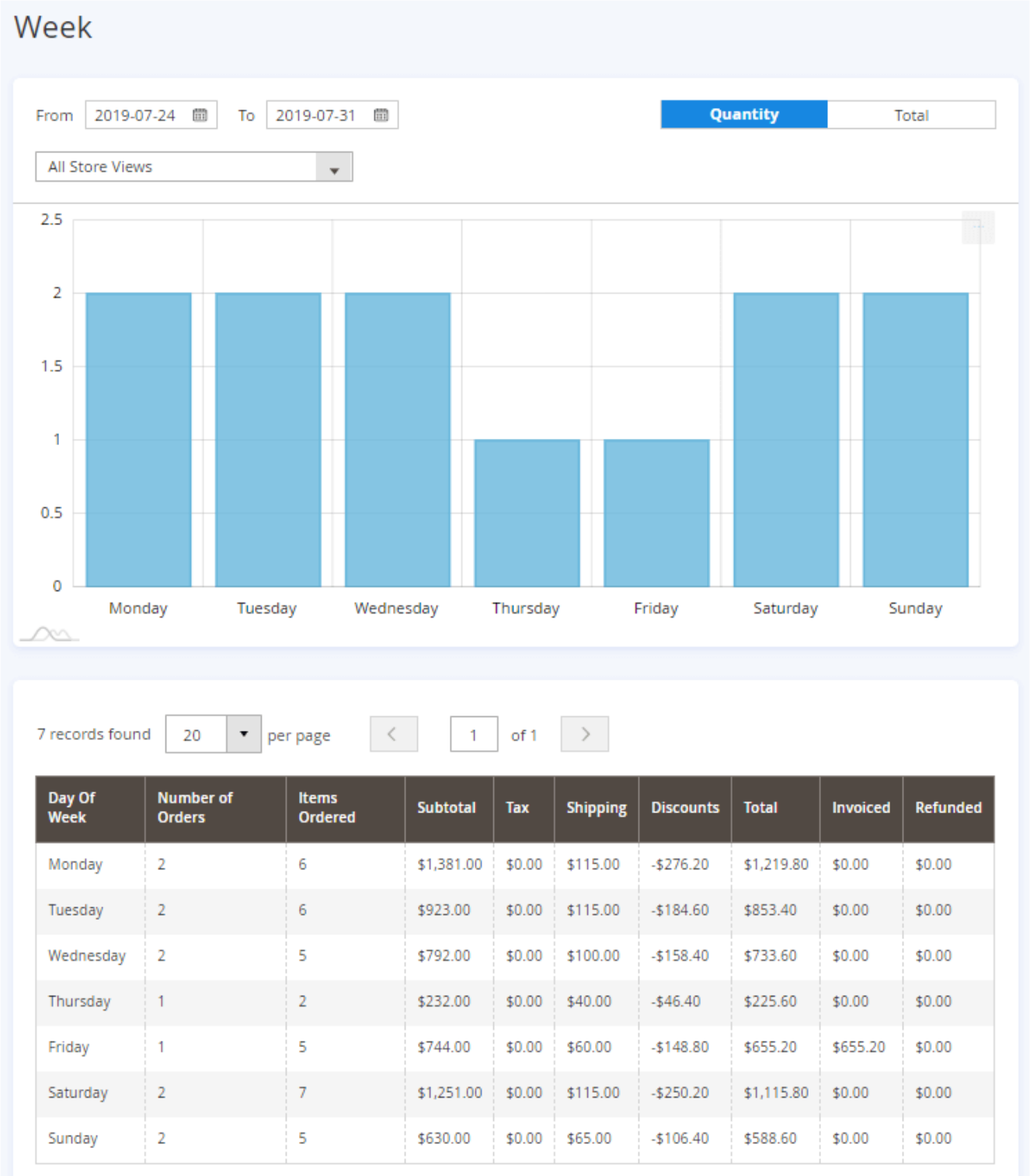
From 2019-07-24 To 2019-07-31 Quantity Total

All Store Views



2 records found 20 per page 1 of 1

Hour	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
14	10	31	$5,222.00	$0.00	$530.00	-$1,024.80	$4,727.20	$655.20	$0.00
15	2	5	$731.00	$0.00	$80.00	-$146.20	$664.80	$0.00	$0.00

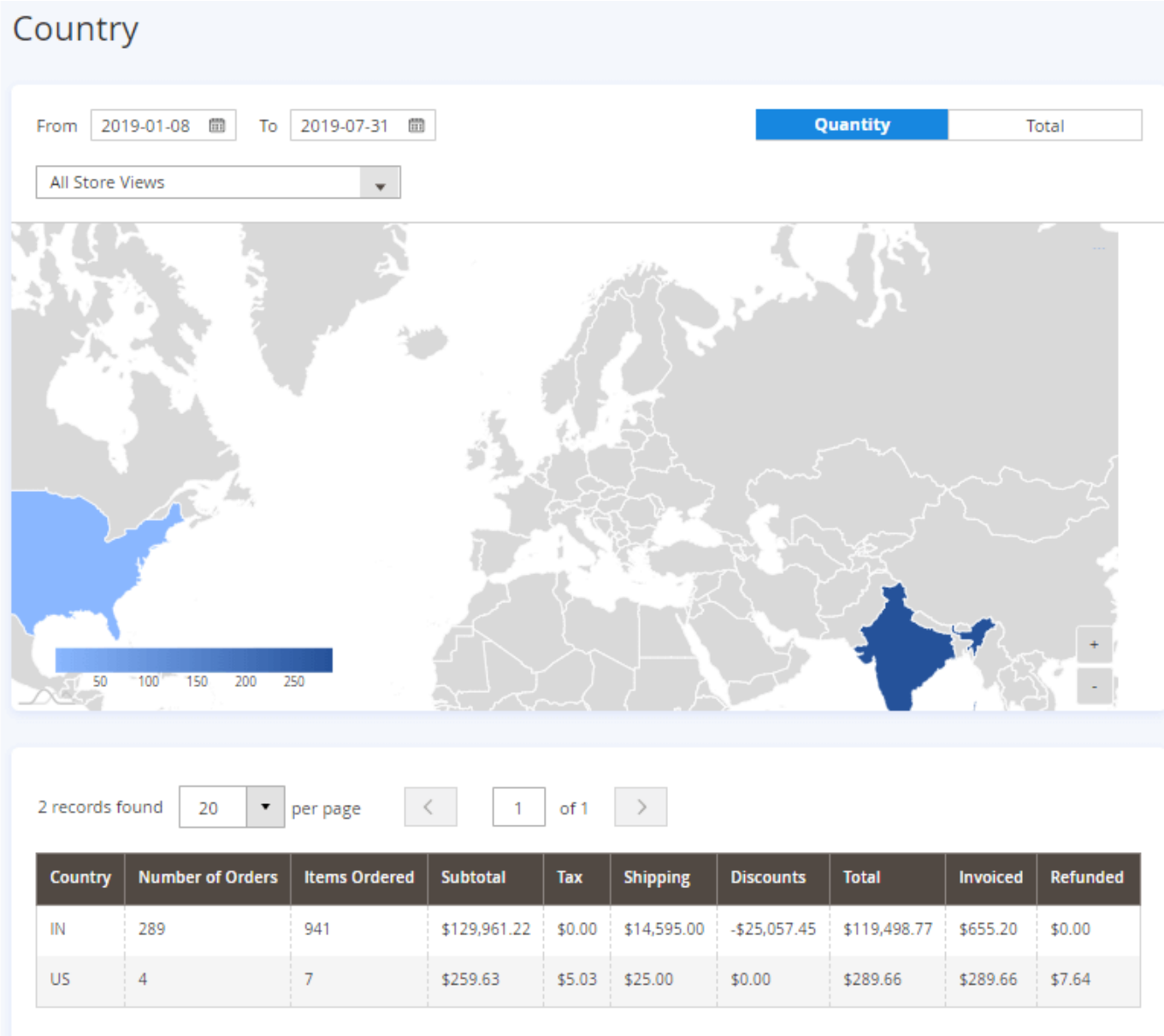


Day Of Week	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
Monday	2	6	$1,381.00	$0.00	$115.00	-$276.20	$1,219.80	$0.00	$0.00
Tuesday	2	6	$923.00	$0.00	$115.00	-$184.60	$853.40	$0.00	$0.00
Wednesday	2	5	$792.00	$0.00	$100.00	-$158.40	$733.60	$0.00	$0.00
Thursday	1	2	$232.00	$0.00	$40.00	-$46.40	$225.60	$0.00	$0.00
Friday	1	5	$744.00	$0.00	$60.00	-$148.80	$655.20	$655.20	$0.00
Saturday	2	7	$1,251.00	$0.00	$115.00	-$250.20	$1,115.80	$0.00	$0.00
Sunday	2	5	$630.00	$0.00	$65.00	-$106.40	$588.60	$0.00	$0.00

Configure Sales by Country Report

Easily study your customers' geolocation and get access to the sales data by countries.

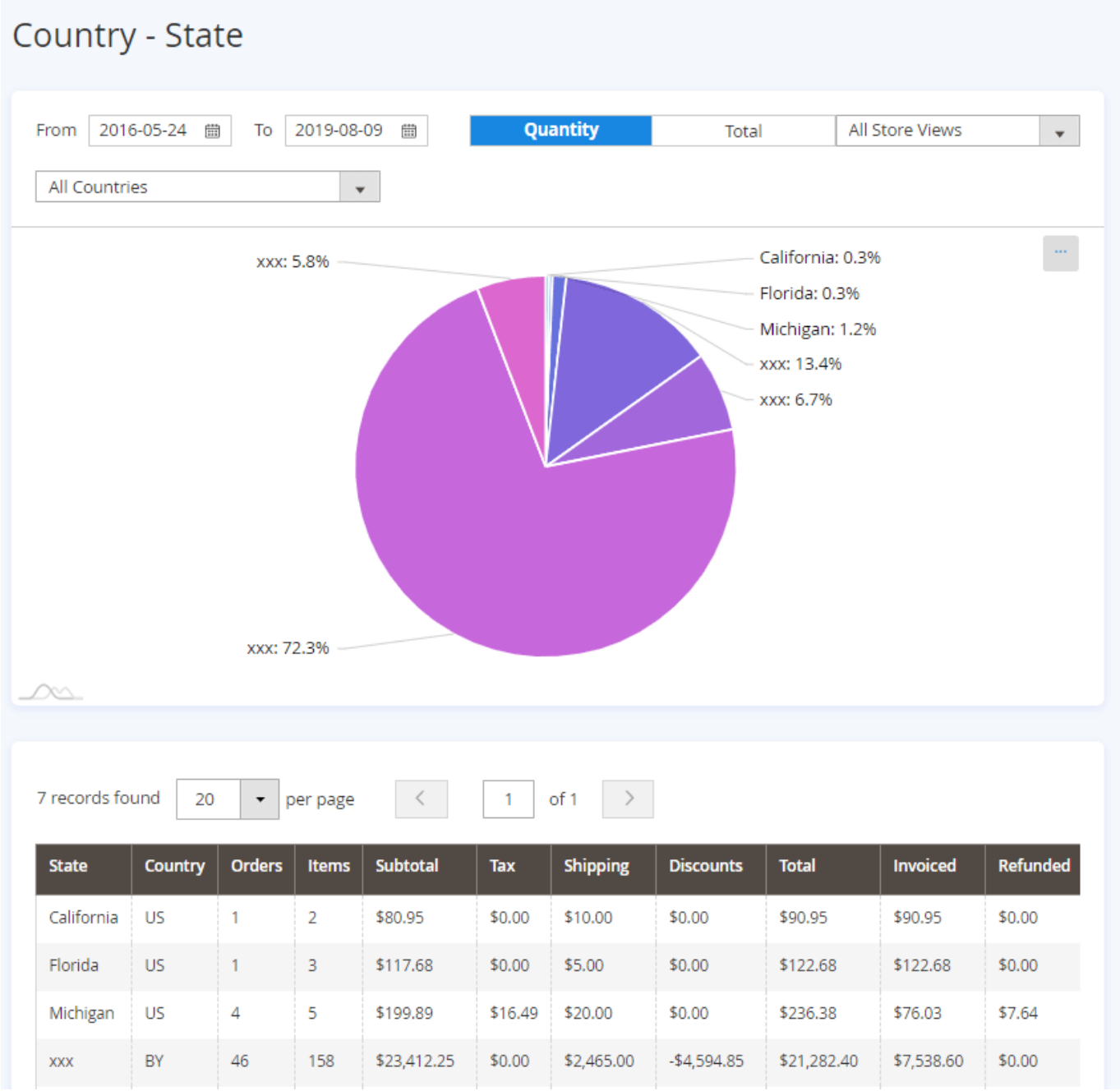
The report shows stats data based either on the number of sold products (**Quantity**) or on the **Total** sum paid by customers within a specific time period. Use a map for better info perception.



Country	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
IN	289	941	$129,961.22	$0.00	$14,595.00	-$25,057.45	$119,498.77	$655.20	$0.00
US	4	7	$259.63	$5.03	$25.00	$0.00	$289.66	$289.66	$7.64

Generate Sales by State Report

View Country-State report to analyze sales data per state.



State	Country	Orders	Items	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
California	US	1	2	$80.95	$0.00	$10.00	$0.00	$90.95	$90.95	$0.00
Florida	US	1	3	$117.68	$0.00	$5.00	$0.00	$122.68	$122.68	$0.00
Michigan	US	4	5	$199.89	$16.49	$20.00	$0.00	$236.38	$76.03	$7.64
xxx	BY	46	158	$23,412.25	$0.00	$2,465.00	-$4,594.85	$21,282.40	$7,538.60	$0.00

Configure Payment Type Report

7 records found 20 per page 1 of 1

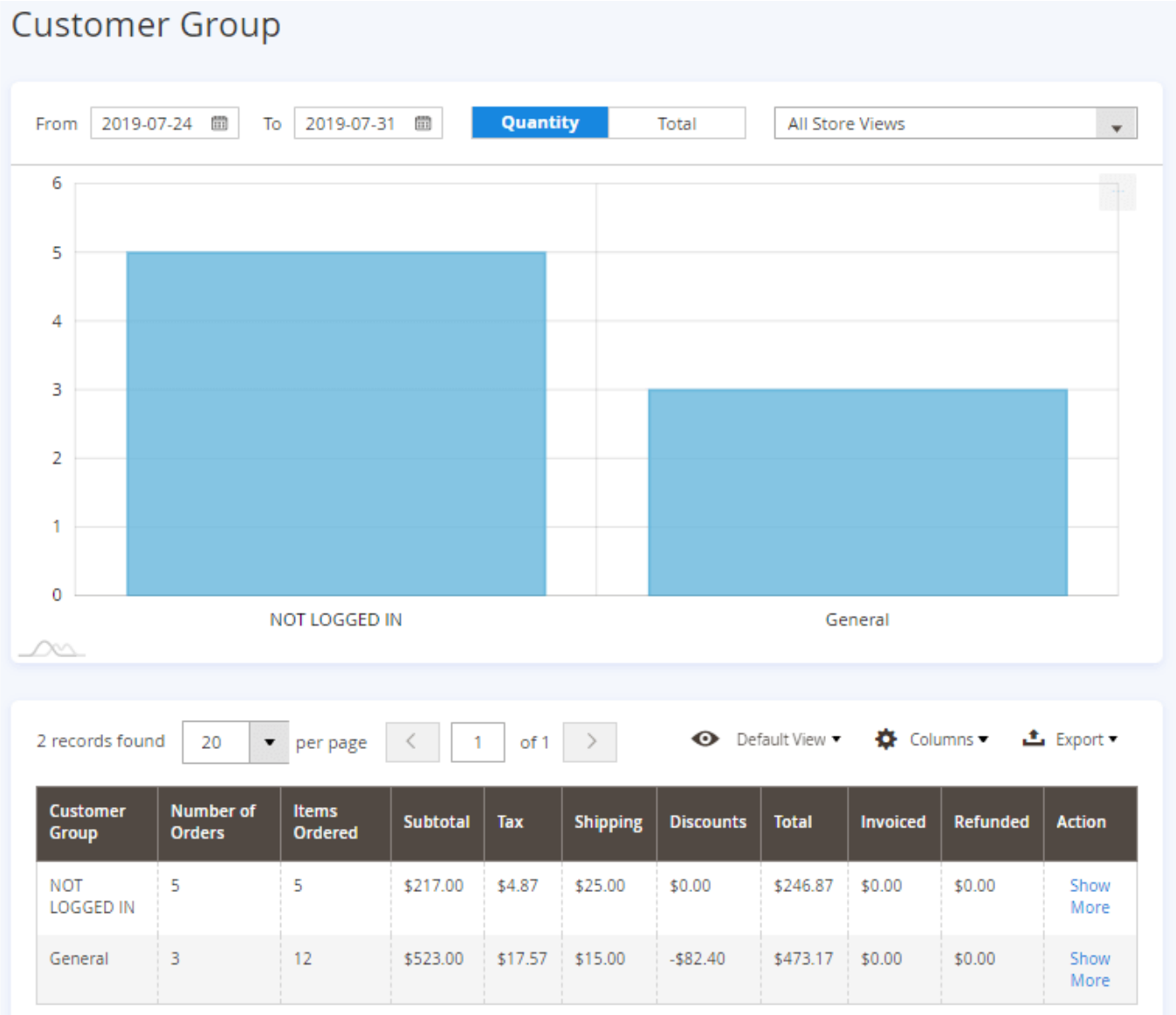
Day Of Week	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts
Check/Money order	70	202	$27,307.96	$5.03	$2,930.00	-$5,063.19
Paypal	51	166	$21,002.93	$13.27	$2,425.00	-$3,998.59

Due to the report you'll get detailed information on the most popular payment types utilized by your customers.

Use these data to organize your order management.

(Fields available: *Payment Type, Number of Orders, Items Ordered, Subtotal, Tax, Shipping, Discounts, Total, Invoiced, Refunded*)

Fine tune Customer Groups Report

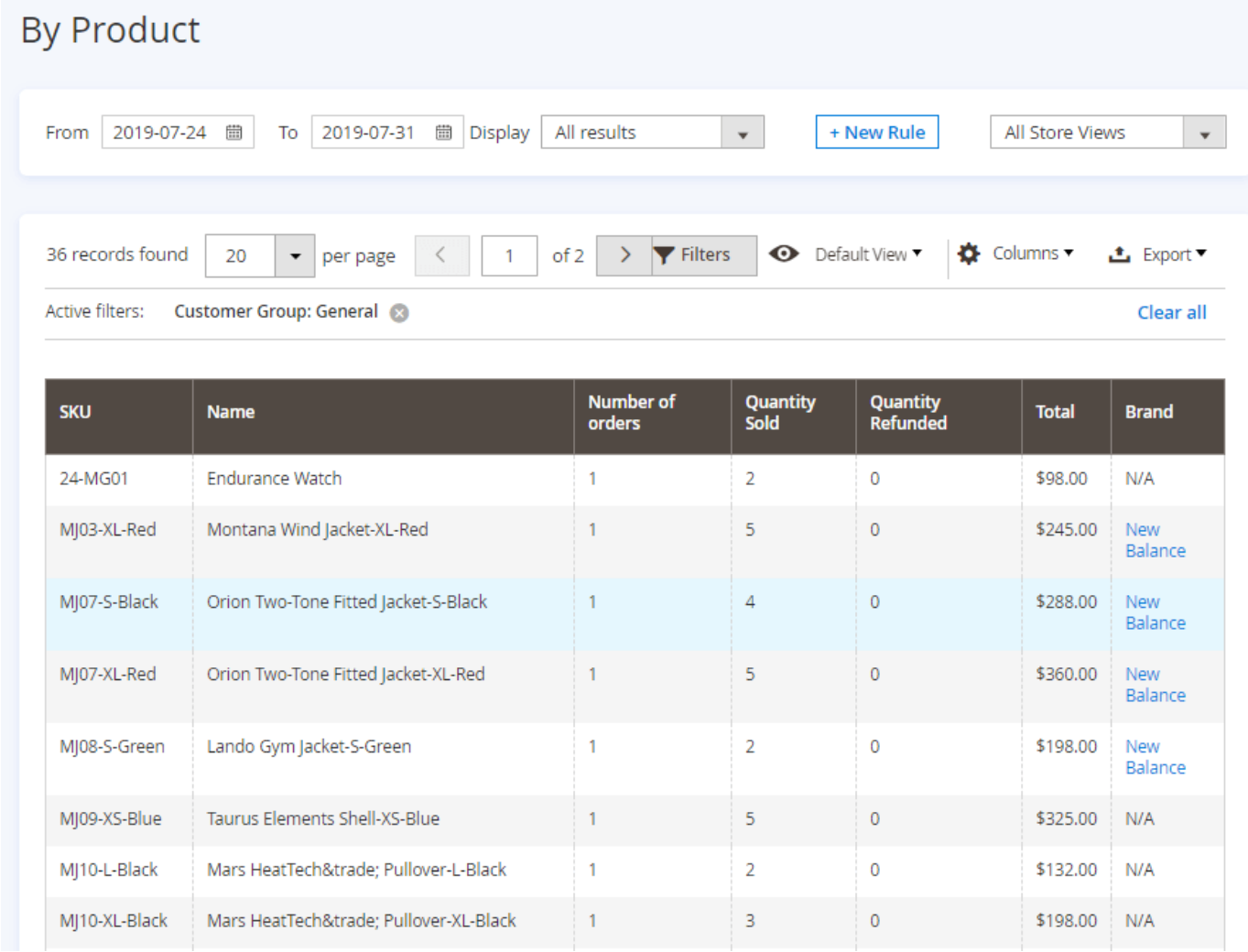


Customer Group	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded	Action
NOT LOGGED IN	5	5	$217.00	$4.87	$25.00	$0.00	$246.87	$0.00	$0.00	Show More
General	3	12	$523.00	$17.57	$15.00	-$82.40	$473.17	$0.00	$0.00	Show More

The report clearly shows which customer groups bring you more sales. You can filter stats data by the number of sold products or by the total sum paid by customers within a specific time period (**Quantity/Total**).

(Fields available: *Customer Group, Number of Orders, Items Ordered, Subtotal, Tax, Shipping, Discounts, Total, Invoiced, Refunded, Action*)

In the **Action** column you can click the ***Show More*** link to instantly see the 'Sales by Product' report filtered by the chosen customer group:



SKU	Name	Number of orders	Quantity Sold	Quantity Refunded	Total	Brand
24-MG01	Endurance Watch	1	2	0	$98.00	N/A
MJ03-XL-Red	Montana Wind Jacket-XL-Red	1	5	0	$245.00	New Balance
MJ07-S-Black	Orion Two-Tone Fitted Jacket-S-Black	1	4	0	$288.00	New Balance
MJ07-XL-Red	Orion Two-Tone Fitted Jacket-XL-Red	1	5	0	$360.00	New Balance
MJ08-S-Green	Lando Gym Jacket-S-Green	1	2	0	$198.00	New Balance
MJ09-XS-Blue	Taurus Elements Shell-XS-Blue	1	5	0	$325.00	N/A
MJ10-L-Black	Mars HeatTech™ Pullover-L-Black	1	2	0	$132.00	N/A
MJ10-XL-Black	Mars HeatTech™ Pullover-XL-Black	1	3	0	$198.00	N/A

Generate Sales by Coupons Report

If you run promo campaigns on your web store, you need to keep track of conversions generated by the coupons you offer. Learn which promo codes appeared to be more effective.

(Fields available: *Day of week, Number of Orders, Items Ordered, Subtotal, Tax, Shipping, Discounts, Total, Invoiced, Refunded*)

Default View

7 records found 20 per page 1 of 1

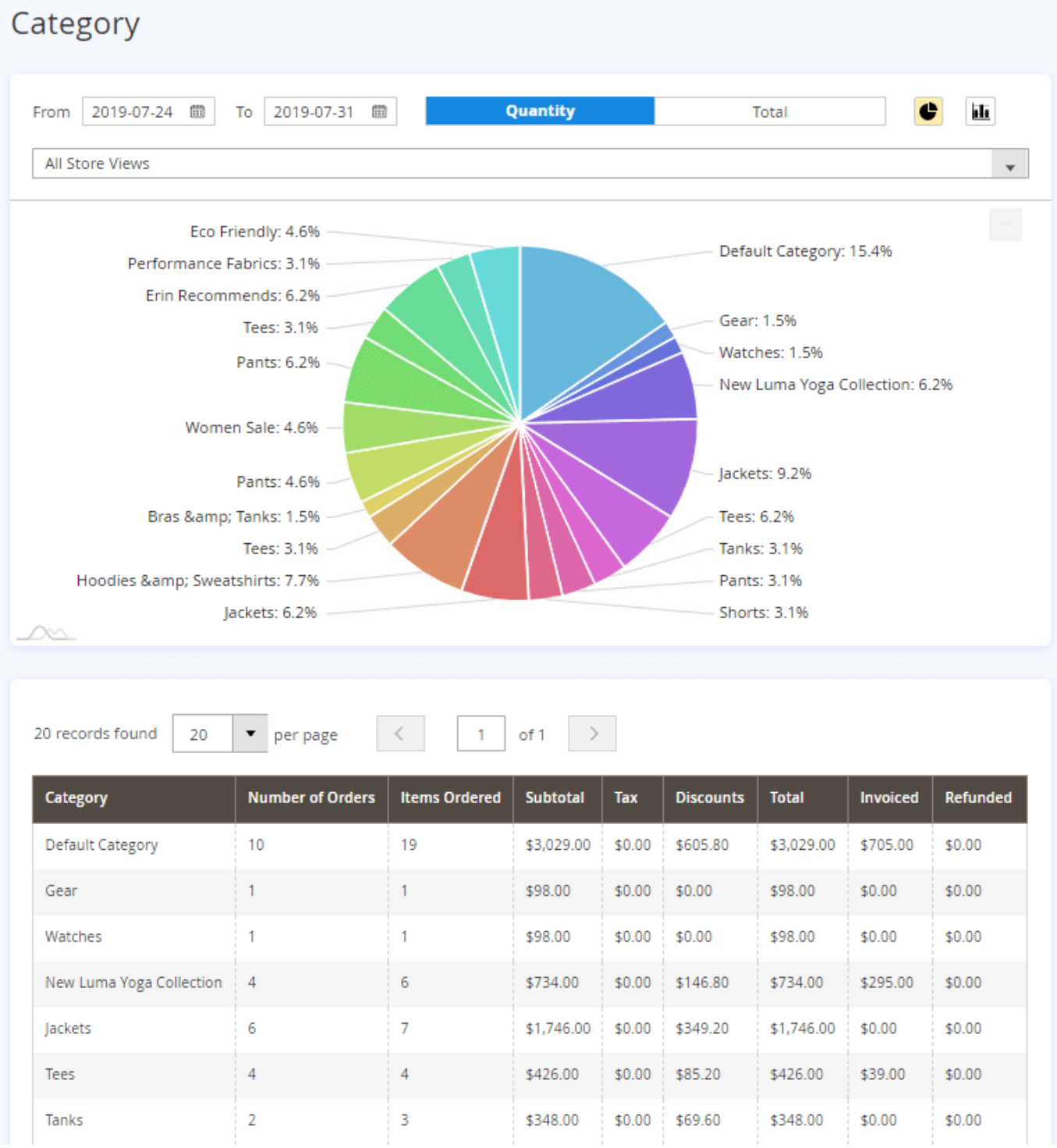
Day Of Week	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts
WEEKLYDEAL20	6	20	$2,489.00	$0.00	$280.00	-$497.80
15OFF	2	6	$425.00	$13.27	$35.00	-$85.00

Configure Sales by Category Report

Use convenient graphs to study customers' demands. Find out which product groups enjoy greater popularity and restock accordingly.

(Fields available: *Category, Number of Orders, Items Ordered, Subtotal, Tax, Shipping, Discounts, Total, Invoiced, Refunded*)

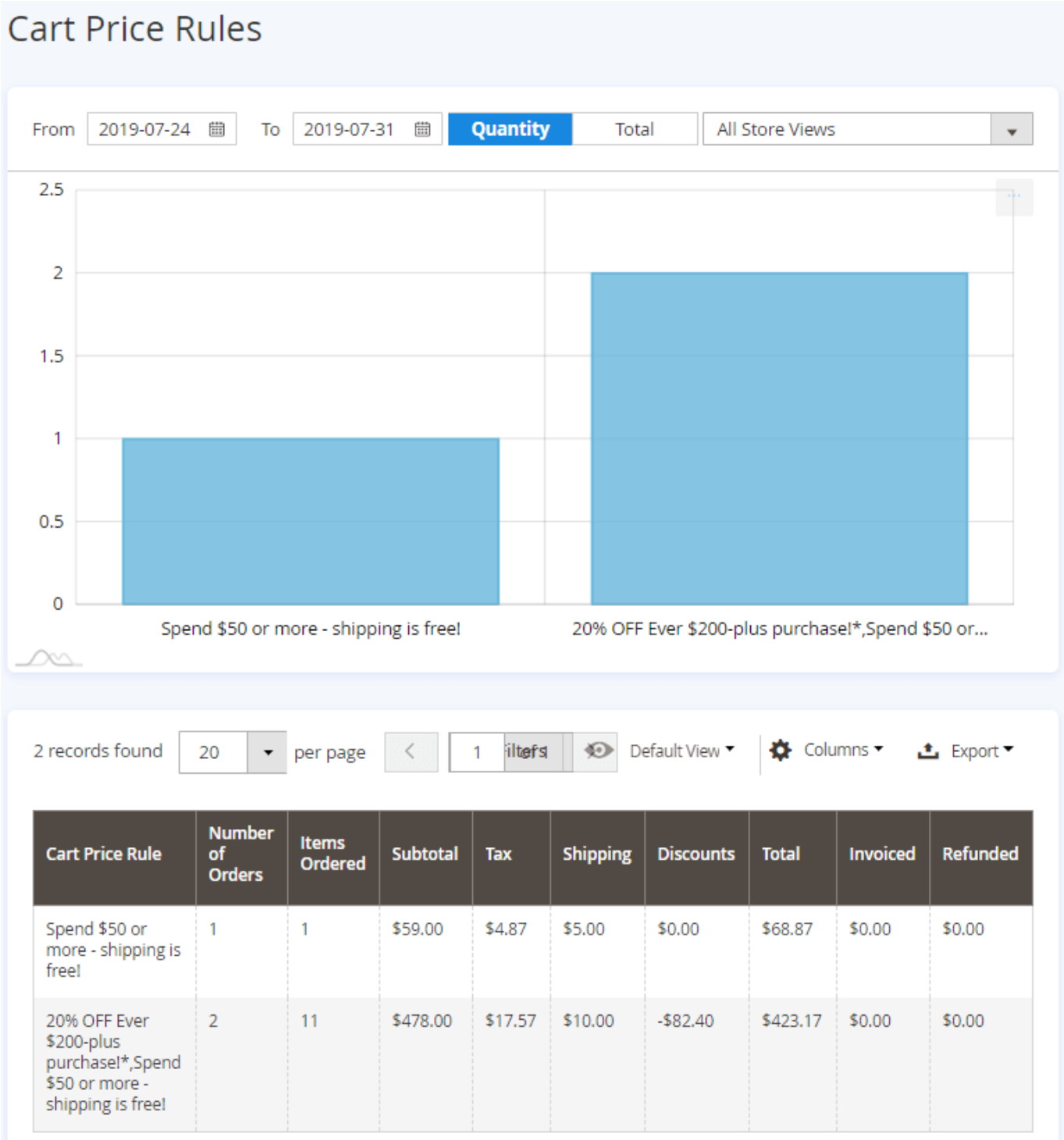
Choose the way of visualization of the report: pie chart or bar graph.



Category	Number of Orders	Items Ordered	Subtotal	Tax	Discounts	Total	Invoiced	Refunded
Default Category	10	19	$3,029.00	$0.00	$605.80	$3,029.00	$705.00	$0.00
Gear	1	1	$98.00	$0.00	$0.00	$98.00	$0.00	$0.00
Watches	1	1	$98.00	$0.00	$0.00	$98.00	$0.00	$0.00
New Luma Yoga Collection	4	6	$734.00	$0.00	$146.80	$734.00	$295.00	$0.00
Jackets	6	7	$1,746.00	$0.00	$349.20	$1,746.00	$0.00	$0.00
Tees	4	4	$426.00	$0.00	$85.20	$426.00	$39.00	$0.00
Tanks	2	3	$348.00	$0.00	$69.60	$348.00	$0.00	$0.00

Configure Sales by Cart Price Rules report

In this tab, you can check your cart price rules' effectiveness.



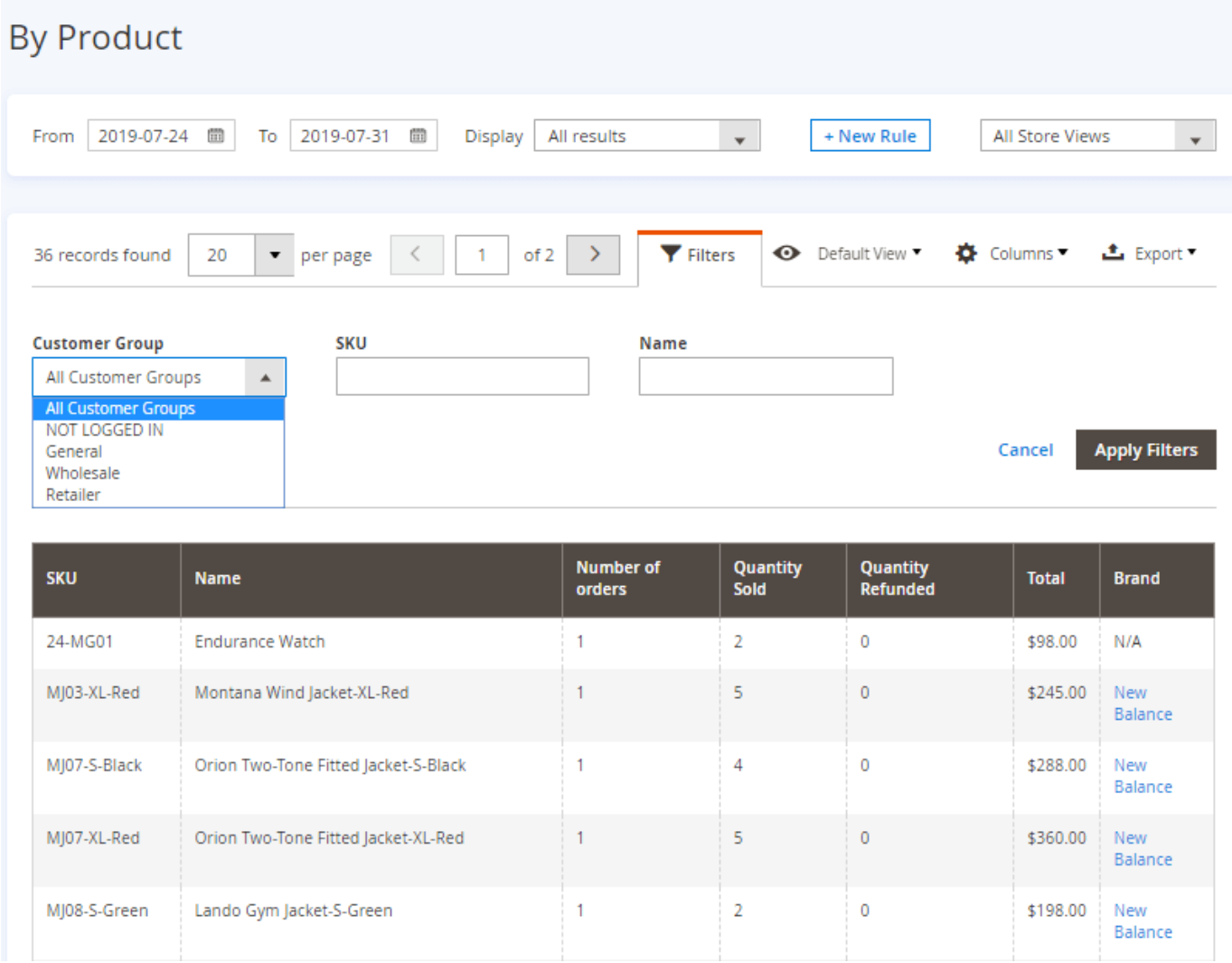
Catalog

Configure Product Report

Set the necessary time period to get a detailed product sales report. The report includes:

- Product SKU
- Product Name

- Product Quantity
- Quantity Sold (is calculated as “qty sold = qty ordered - qty cancelled - qty refunded”)
- Quantity Ordered
- Quantity Cancelled
- Quantity Refunded
- Product Total
- Brand



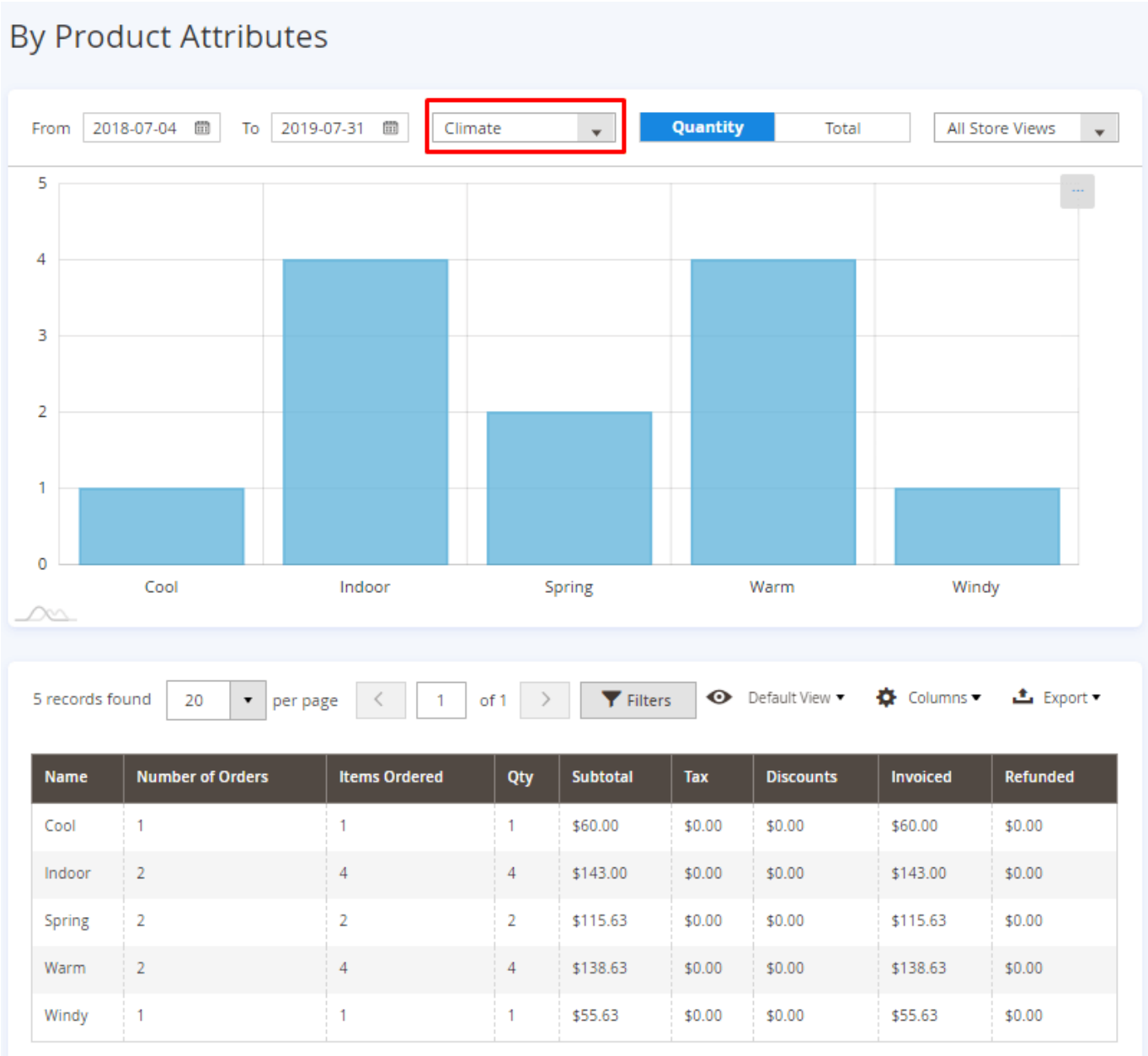
You can filter ***By Product*** stats data by customer group, SKU or a product name.

When closing order with a bundle product, the “bundle” value won't be marked in the **Quantity Cancelled** column.
In this section, you may also generate custom rule-based product reports. Please, refer to **'Custom Reports'** section to know more.

Generate Reports Based on Product Attributes

The report allows you to learn which product configurations generate more conversions. Set the time period and select the necessary product attribute or attribute set in a dropdown to get detailed stats data.

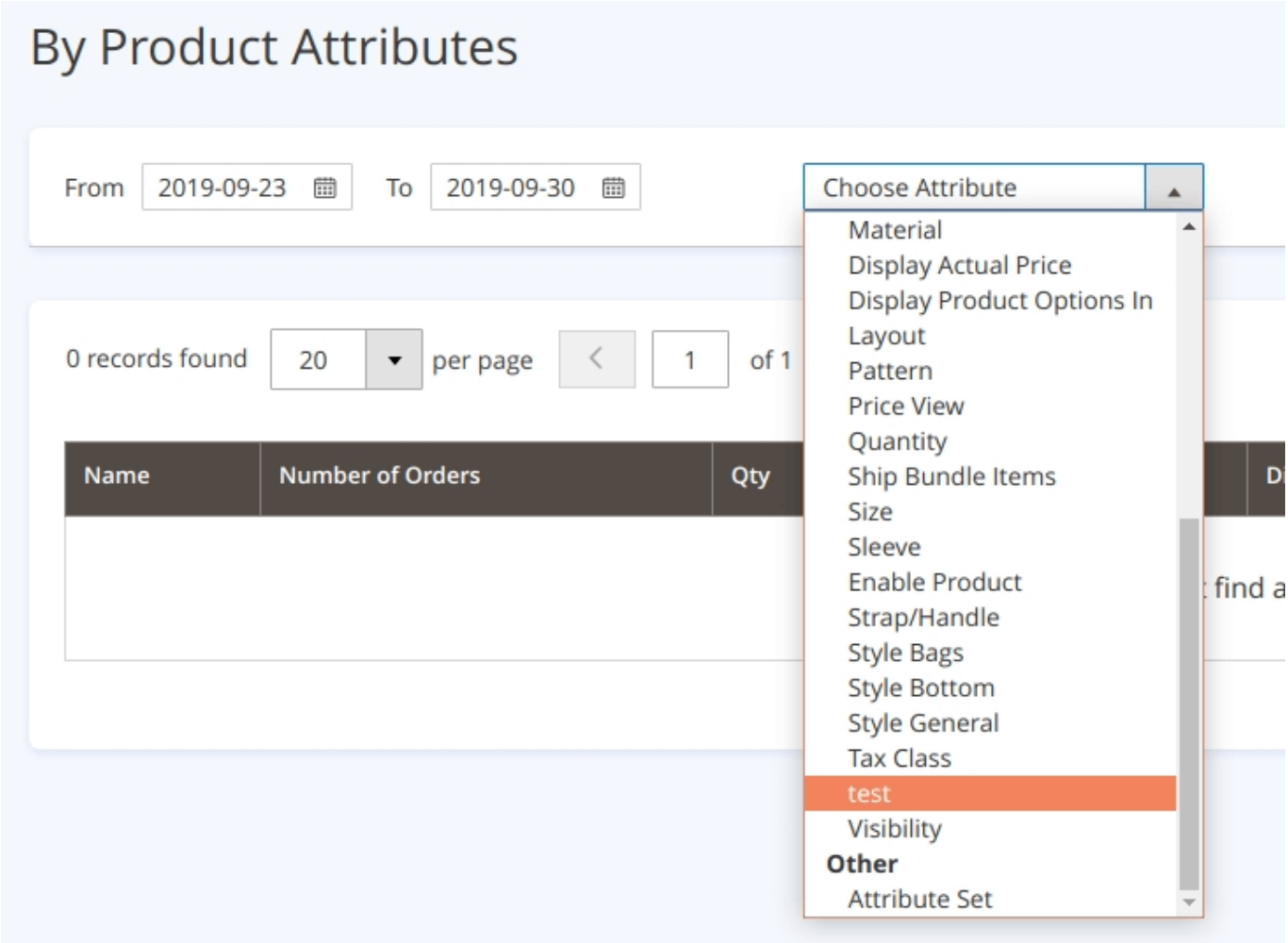
You can also choose to show reports based on product attribute set.



Name	Number of Orders	Items Ordered	Qty	Subtotal	Tax	Discounts	Invoiced	Refunded
Cool	1	1	1	$60.00	$0.00	$0.00	$60.00	$0.00
Indoor	2	4	4	$143.00	$0.00	$0.00	$143.00	$0.00
Spring	2	2	2	$115.63	$0.00	$0.00	$115.63	$0.00
Warm	2	4	4	$138.63	$0.00	$0.00	$138.63	$0.00
Windy	1	1	1	$55.63	$0.00	$0.00	$55.63	$0.00

In the **Discounts** column only the discounts from cart price rules are counted.

You may use default attributes for your report or create custom ones.

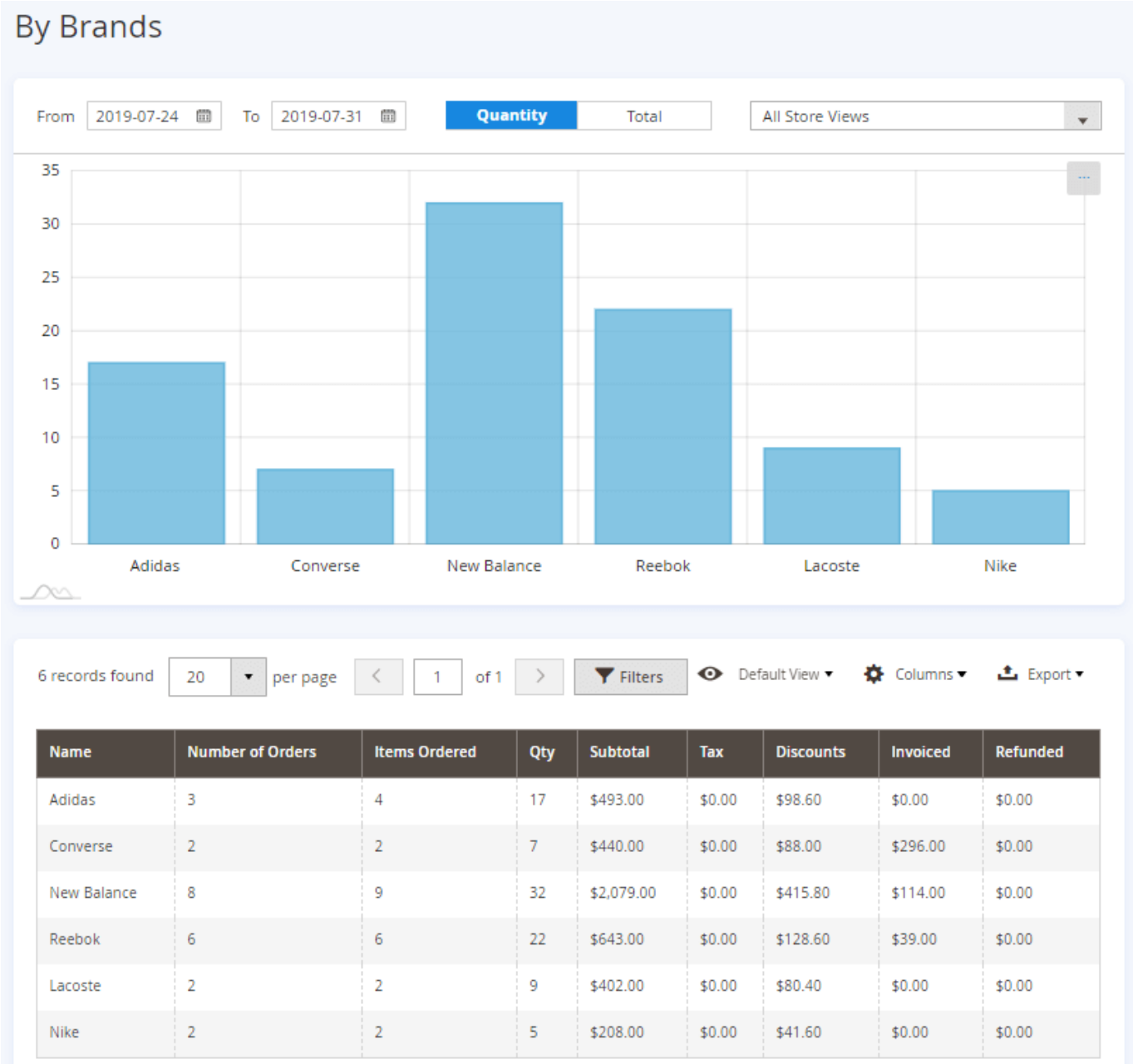


To create a new attribute, please go to Stores → Product → Add New Attribute.

To create a new attribute set, please go to Stores → Attribute Set → Add Attribute Set.

Check Reports Based on Brands

The extension also allows seeing the statistics based on brands. This feature will be useful for the owner of a multi-brand store.

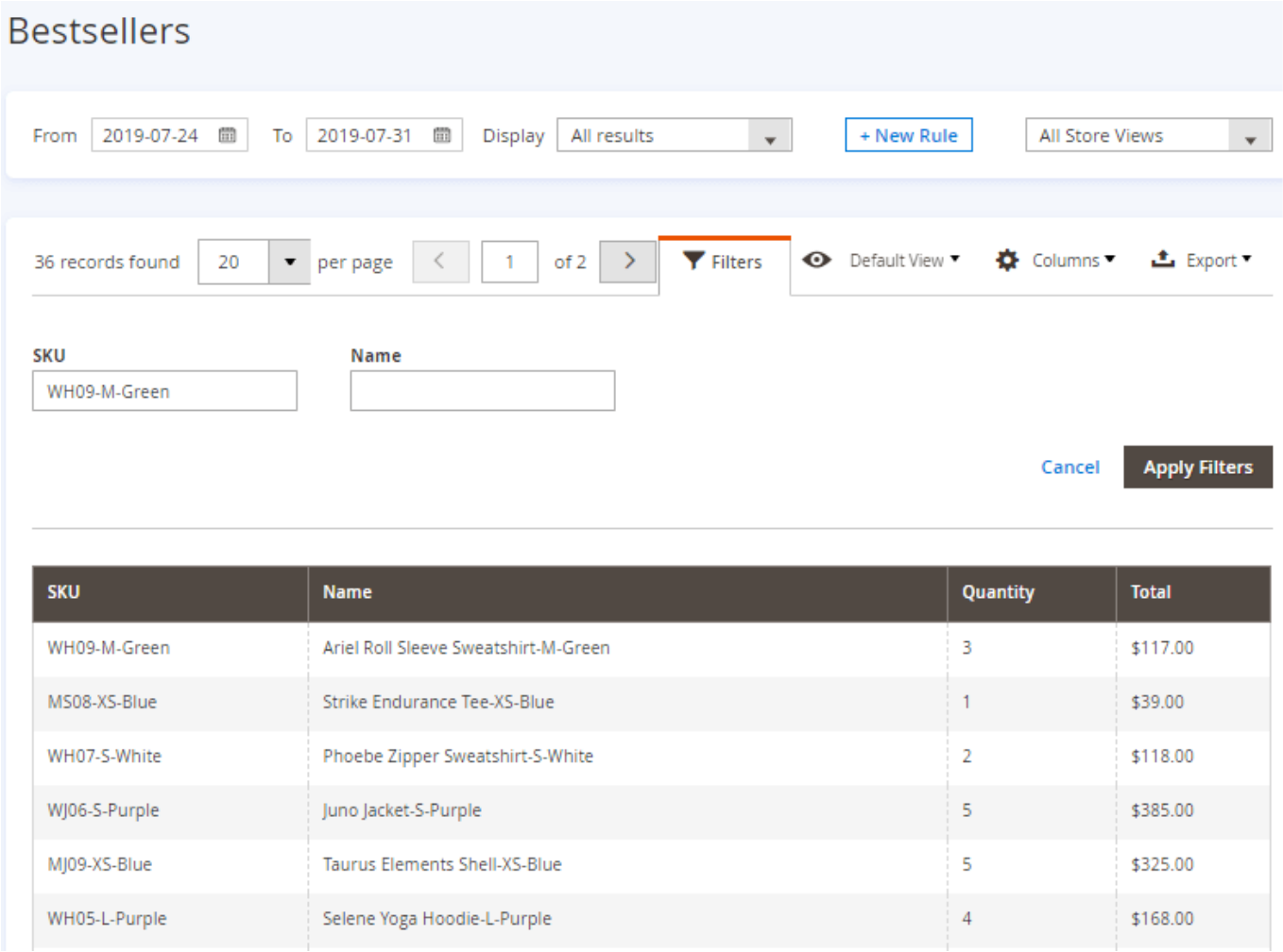


Name	Number of Orders	Items Ordered	Qty	Subtotal	Tax	Discounts	Invoiced	Refunded
Adidas	3	4	17	$493.00	$0.00	$98.60	$0.00	$0.00
Converse	2	2	7	$440.00	$0.00	$88.00	$296.00	$0.00
New Balance	8	9	32	$2,079.00	$0.00	$415.80	$114.00	$0.00
Reebok	6	6	22	$643.00	$0.00	$128.60	$39.00	$0.00
Lacoste	2	2	9	$402.00	$0.00	$80.40	$0.00	$0.00
Nike	2	2	5	$208.00	$0.00	$41.60	$0.00	$0.00

Configure Bestsellers Report

Find out which products enjoy greater popularity depending on a specific time period (month, year etc.) Set the time interval to get a detailed bestsellers report. The report includes:

- Product SKU
- Product Name
- Product Quantity
- Product Total



You can filter *Bestsellers* stats data by SKU or a product name.

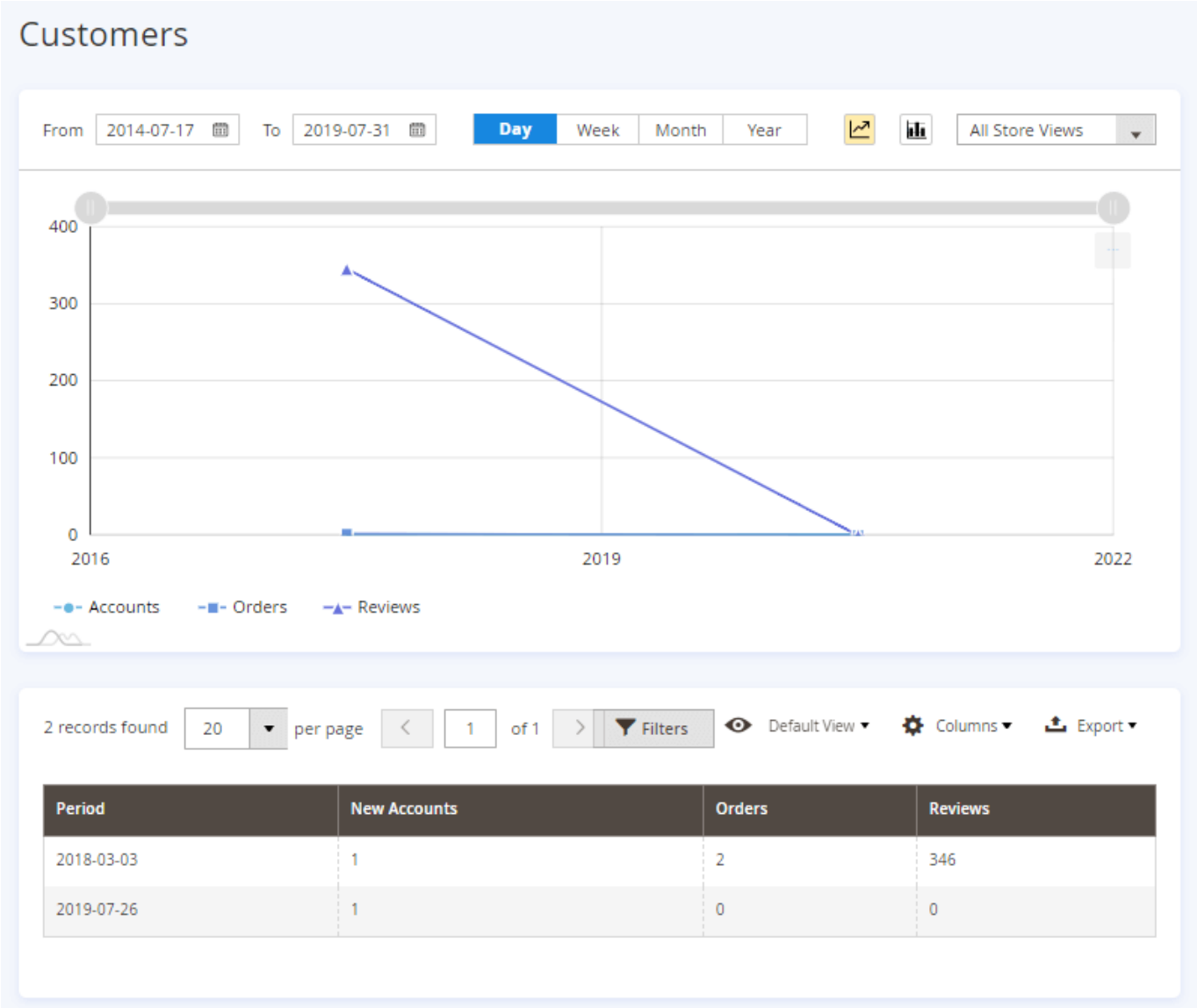
Customers

Configure Customer Report

Generate customer report based on a specific time period. Select the necessary time step (**Day, Week, Month, Year**) to tailor the report to your needs.

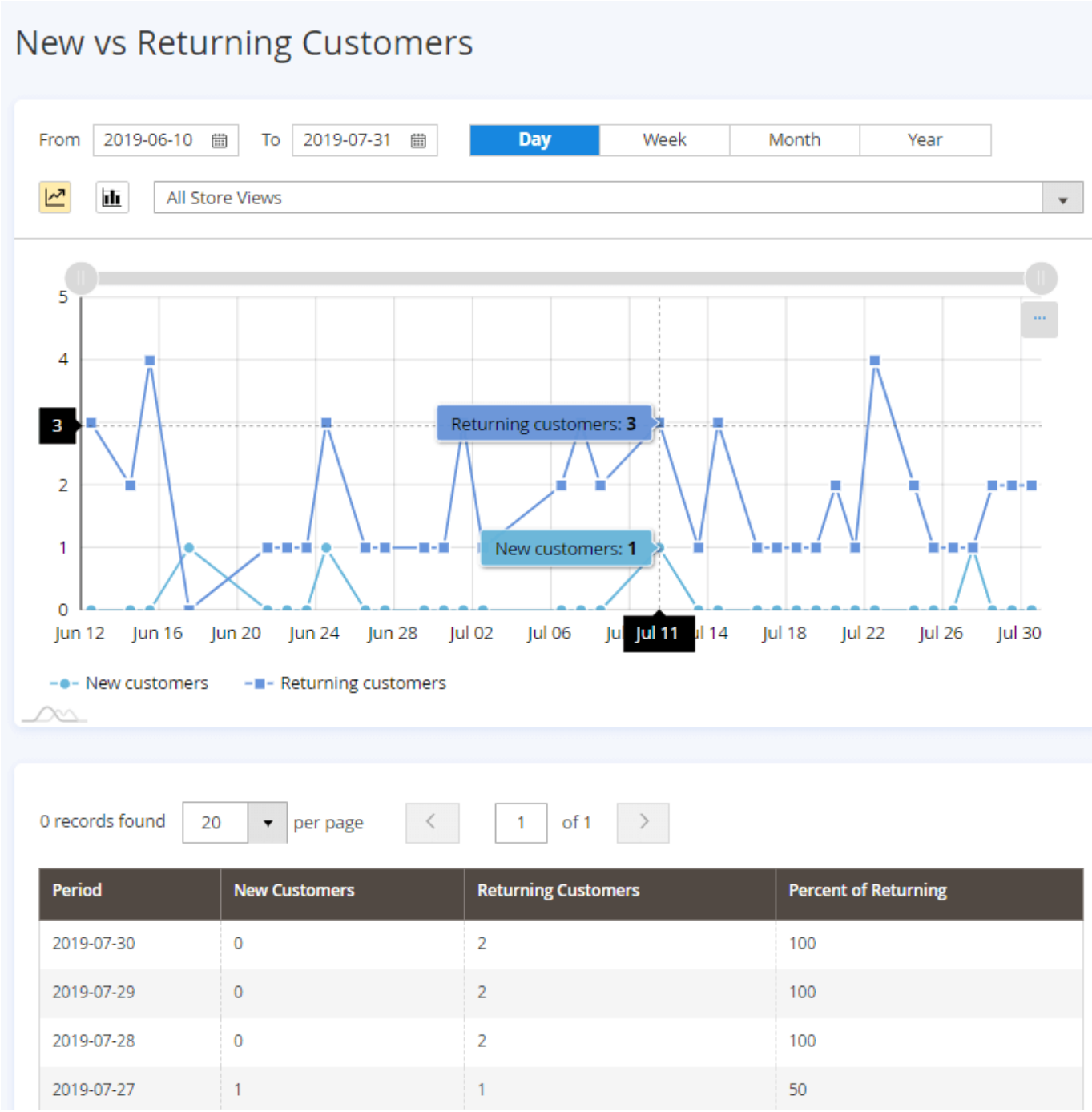
Manage data display on the graph by enabling/disabling such parameters as:

- *New Accounts*;
- *Orders*;
- *Reviews*.



Check New vs. Returning Customers Report

Easily study your audience to analyze your sales strategy. See the results for *New* and *Returning Customers*.

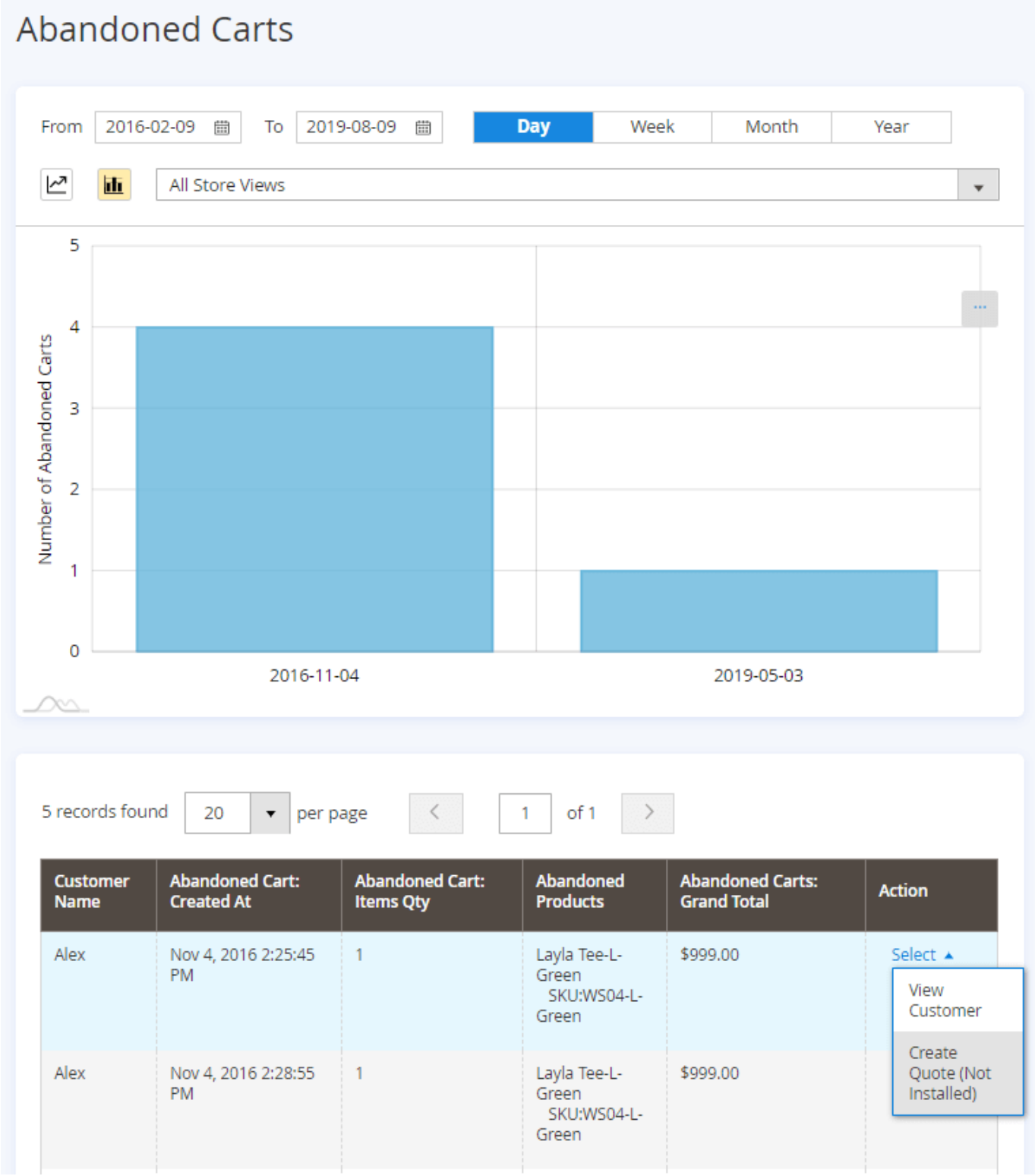


Period	New Customers	Returning Customers	Percent of Returning
2019-07-30	0	2	100
2019-07-29	0	2	100
2019-07-28	0	2	100
2019-07-27	1	1	50

Generate Abandoned Carts Report

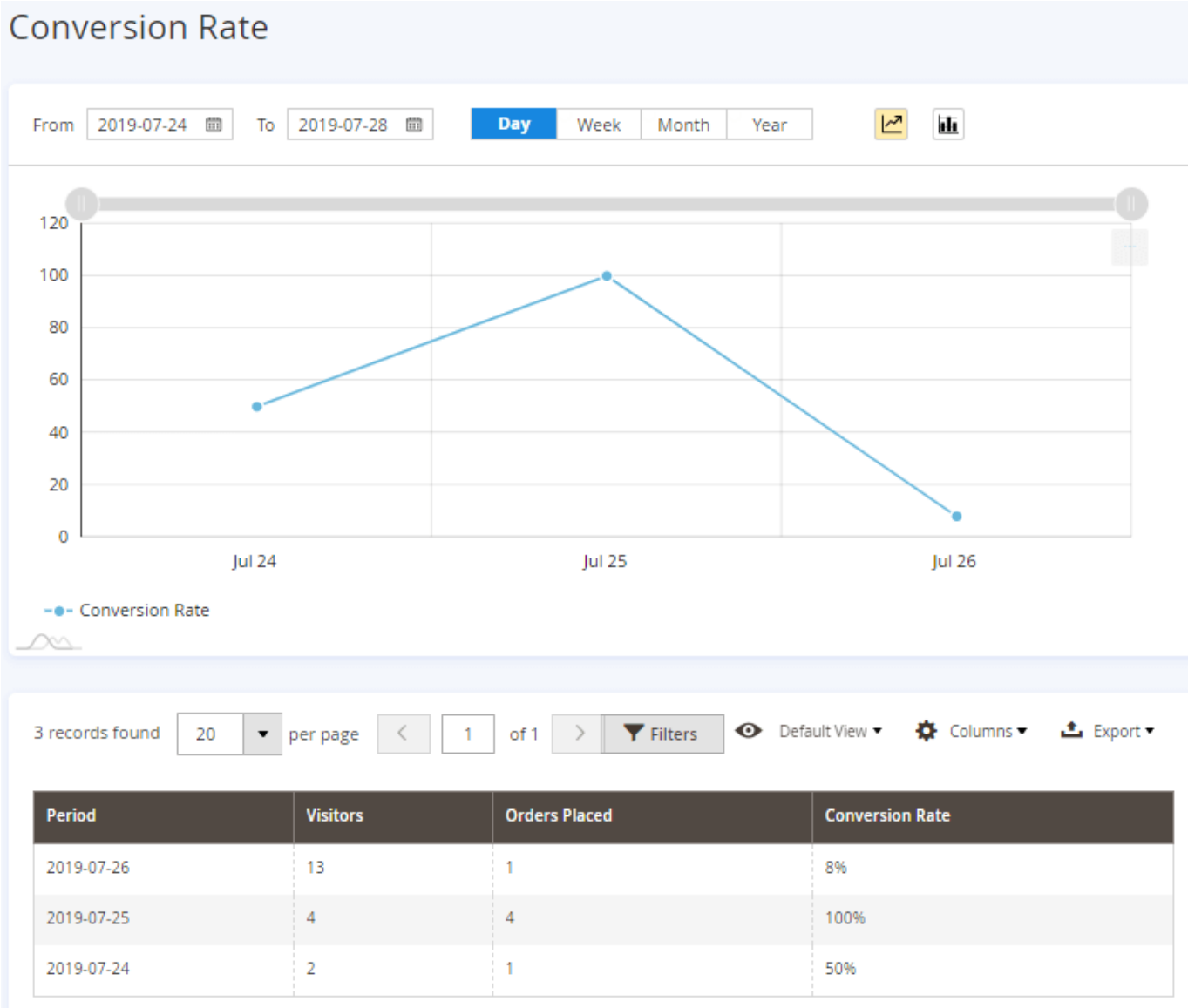
Use this report to identify customers who left your website without checking out. Easily view the cart abandonment rate over time. Track the data by customer's name email address, the number of products in the cart, subtotal, the date, etc.

Add **Request A Quote extension** to check the abandoned products and instantly offer better deals to your customers right from Abandoned Carts Report page



Track Conversion Rate

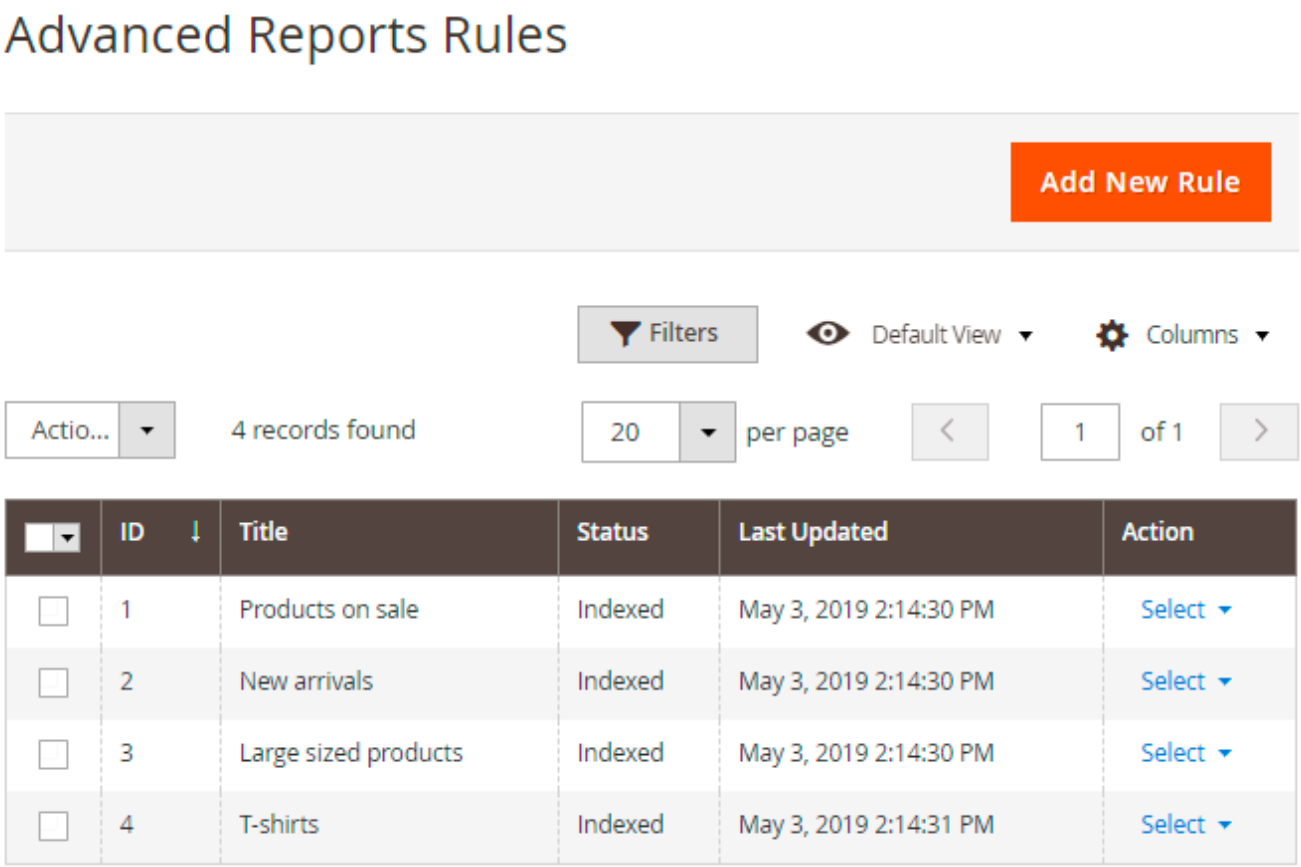
The extension includes a new report option which lets you check the conversion rate of the store, or, in other words, the percentage of customers who find the store suitable enough to place the order. Break the data by custom sales ranges for more details.



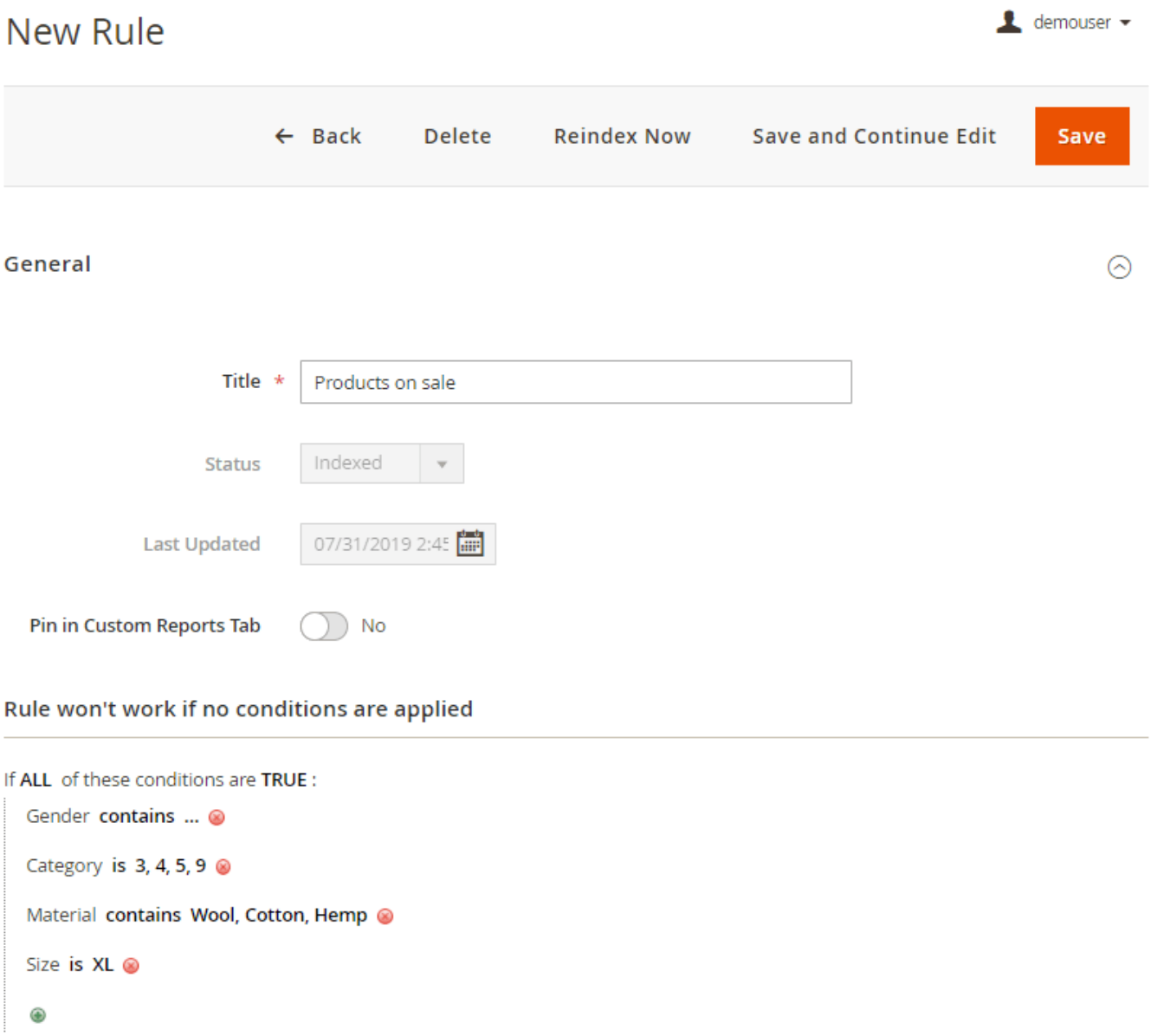
Custom Reports

Advanced Reports Rules (for Custom Reports)

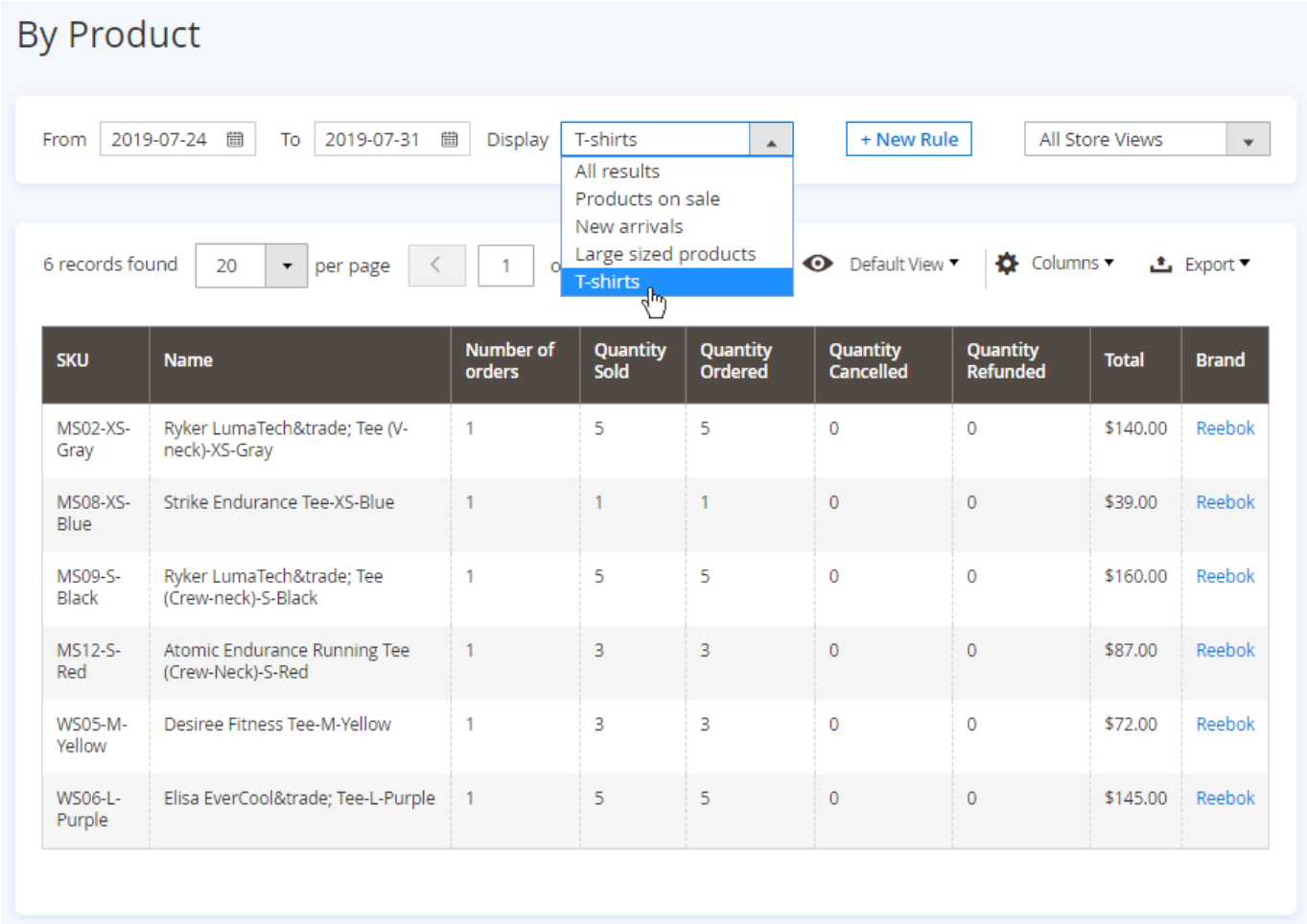
With the extension, you can easily build custom rule-based product reports. For example, create unique reports for products with special attributes or a combination of attributes. To do this, please, go to **Reports → Advanced Reports Rules** or **Reports → Advanced Reports → Custom Reports → New Rule**.



On the grid, you can track and manage all existing reports rules. To create a new rule, please, click the **Add New Rule** button.



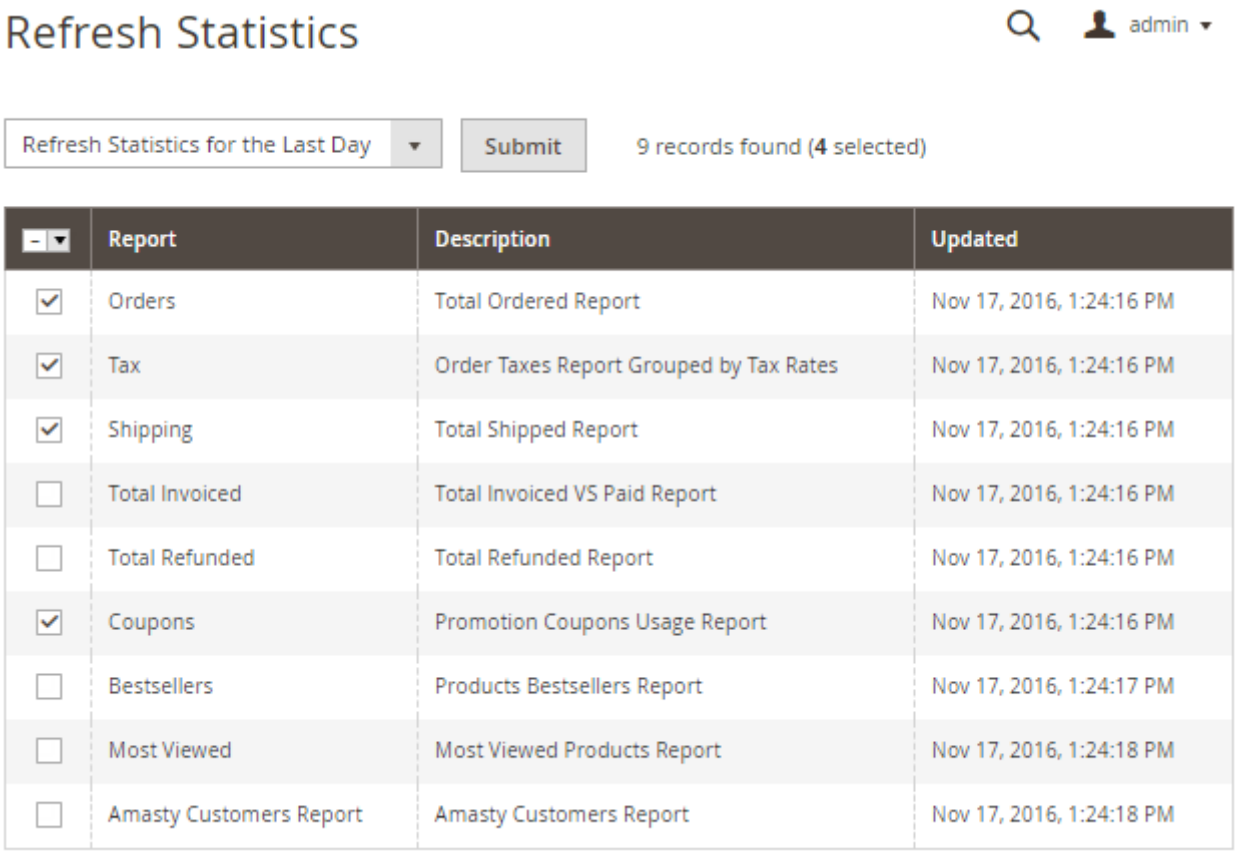
To configure the reports rule, give it a title and specify the necessary conditions. Then, you can create custom reports by applying the rule in the 'By Product' report in the **Display** dropdown:



You can also create new rules by simply clicking the **+ New Rule** button on the 'By Product' report panel.

Refresh Statistics

To refresh the statistics, go to **Reports → Refresh Statistics**. To get the reports timely updated and see the latest data, select necessary elements in the list and apply the **Refresh Lifetime statistics** or **Refresh the Statistics for the Last Day** action.



Find out how to install the **Advanced Reports** extension for Magento 2 via Composer.

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