

**ultimate\_reports**

**version**

**BoostMyShop**

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# ultimate\_reports

## 1. Overview

Ultimate reports allow you to see a complete analysis report.

You can define a time frame and filter results by day, month, or year.

Reports concerns :

- Total sales
- Sales by country
- 10 best-selling products
- Top 10 customers
- All processed refunds

Sales:

- Total sales
- Sales by payment method
- Sales by shipping method
- Refunds |

Products:

- Best sellers
- Sales by product
- Cross-sales by product
- Best and worst-rated products
- Sales by site/country
- Average sales price evolution
- Sales by category
- Sales by manufacturer

Customers:

- New customers
- Breakdown by group/country
- Top customers
- Products purchased per customer
- Total sales per customer

Country:

- Total sales
- Top customers
- Top products

You have also possibility to find reports by products by going in the product view in a Report tabs.

## 2. Installation

### 3. Configuration

#### **WARNING**

Before files upload, **ENABLE MAGENTO CACHES** : this will prevent Magento to try to install extension before all files are uploaded.

Also, if you have any :

- APC cache
- Redis cache
- Memcache
- Activated the Compilation of Magento

> Please disable them

#### **Installation**

Download the last release (actually 1.1.8) from your BoostMyShop account.

#### **Note**




Note : it is strongly recommended to install that new extension on a staging (pre-prod) server first, so that any potential error can be solved.

The installation process is very simple :

- Enable Magento caches
- Unzip Ultimate report module then upload his content (folders /app + /skin + /js + /lib) into your magento server
- Refresh the Magento cache

#### **Uploading**

Drag and Drop the folders from the left tab to the right tab (your remote root site location)

 app	17/11/2015 01:47	Dossier de fichiers
 js	17/11/2015 01:47	Dossier de fichiers
 lib	17/11/2015 01:47	Dossier de fichiers
 skin	17/11/2015 01:47	Dossier de fichiers

You just need to upload this file structure to your server on the same file structure provided by Magento.

No code file will be erase : All the code files will be available into /app/code/community/MDN

#### **Upgrade**

1. If you have made customization of the extension, before to upload files make sure :
  - To identify and save the customization (in app/code/community or app/code/local)
  - To apply these customization to the new version, to be careful whit this, it is advised to realize this with your developer in order to adapt the code properly.
  - Then follow the same process like Installation part of this documentation.
2. In case you never made any customizations please just follow the installation process.

### **3. Configuration**

All settings are available using menu

### 3. Configuration

## Warning

If you get an error message (access denied), you need to logout and login to Magento Admin panel to reset permission.

## General

You can see the current version of the extension.

Reports configuration

Save Config

General		
Module version	1.1.8	[GLOBAL]

## Dashboard

You can define reports you want display in the Dashboard

Dashboard		
Reports to display	<ul style="list-style-type: none"><li>Customer - New customers</li><li>Customer - Customers per store</li><li>Customer - Customers per group</li><li>Customer - Sales total per customer group</li><li><b>Customer - Top customer</b></li><li>Customer - Customers per country</li><li>Reviews - Approved reviews</li><li>Reviews - Best rated products</li><li>Reviews - Worst rated products</li><li>Paymentmethod - Orders per payment method</li></ul>	[GLOBAL]

## Attributes

If you want display sales per manufacturer or products per manufacturer in Ultimate Reports > Products > Manufacturer define here your attribute used for manufacturer.

Attributes		
Manufacturer attribute	manufacturer	[GLOBAL]

## Filters

Define here how you want displayed reports by filtering by default by :

Period :

- Today
- Yesterday
- This week
- This month
- Last Month
- Last 30 days
- Last 3 months
- Last 6 months
- Last 12 months
- This year
- Lifetime
- Custom

Group :

#### 4. Create a report

- hour
- day
- week
- month
- year

Order status :

- Pending
- Processing
- Complete
- Closed
- Canceled
- On Hold

Filters

Default group by: day [GLOBAL]

Default period: This month [GLOBAL]

Order statuses: -- Please Select -- [GLOBAL]

- Pending
- Processing
- Complete
- Closed
- Canceled
- On Hold

### Miscellaneous

This part is only for inventory reports in Ultimate Reports used with ERP.

In ERP > Reports > Inventory > Old Stock

Define day(s) to consider products as old stock.

## 4. Create a report

### Warning

You need to know SQL and XML language to create a new report.

### Create a new report

#### Report XML

Copy and entry from the other one and add an entry in

```
/lib/mdn/smartreports/erp.xml
```

there is the field

```
<group>purchase</group>
```

The group will link this report to the group you define in the menu

ERP -> Reports -> Purchase



## 4. Create a report

### Group

do a report like describe upper

add/modify the group reference like this

```
<group>orderpreparation</group>
```

### Controller

Edit the file

app/code/community/MDN/SmartReport/controllers/Adminhtml/SmartReport/ReportsController.php

add a function like

```
public function OrderPreparationAction()
{
    $this->loadLayout();
    $this->renderLayout();
}
```

### Layout

Edit the file

app/design/adminhtml/default/default/layout/SmartReport.xml

add an entry like

```
<adminhtml_smartreport_reports_orderpreparation>
  <reference name="content">
    <block type="SmartReport/Report_Type" template="SmartReport/Report/Type.phtml"></block>
  </reference>
  <update handle="smartreport_common" />
</adminhtml_smartreport_reports_orderpreparation>
```

### Adminhtml.xml

Edit the file

app/code/community/MDN/SmartReport/etc/adminhtml.xml

Between the children of the XML entry smartreport

add an entry like

```
<order_preparation translate="title" module="SmartReport">
  <title>Order preparation</title>
  <action>adminhtml/SmartReport_Reports/OrderPreparation</action>
  <sort_order>60</sort_order>
  <depends>
    <config>advancedstock/erp/is_installed</config>
  </depends>
</order_preparation>
```

The action refer to the controller you have created

the fact to add

```
<config>advancedstock/erp/is_installed</config>
```

check if there is ERP, else the report does not appear

### Sub menu

at the same level do like this

#### 4. Create a report

```
<sales translate="title" module="SmartReport">
  <title>Order preparation</title>
  <sort_order>10</sort_order>
  <children>
    <pendingOrder translate="title" module="SmartReport">
      <title>Pending Order</title>
      <action>adminhtml/SmartReport_Reports/OrderPreparation</action>
      <sort_order>10</sort_order>
    </pendingOrder>
    <! ... ->
  </children>
</sales>
```