

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">Customer - New customersCustomer - Customers per storeCustomer - Customers per groupCustomer - Sales total per customer groupCustomer - Top customerCustomer - Customers per countryReviews - Approved reviewsReviews - Best rated productsReviews - Worst rated productsPaymentmethod - Orders per payment method	[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>
```