

REPORTS DOCUMENTATION

FOR

**SHOPIFY E-COMMERCE PROJECT**

Document Version 1.0

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**REPORTS DOCUMENTATION APPROVAL**

The undersigned acknowledge that they have reviewed the **Shopify E-Commerce Project and Reports Documentation** and agree with the information presented within this document. Changes to this document will be coordinated with and approved by the undersigned or their designated representatives.

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**VERSION HISTORY**

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# List of reports

1. Here is the list of report that needs to be send since the launch of Shopify E-Commerce project.
2. All these reports must include information regarding PreserVision, Biotrue and Lumify (Currently only PreserVision reports are being sent since May 17th).
3. All the report must be prepared on AVD.
4. Source data should be downloaded strictly on AVD.

|  |  |  |
| --- | --- | --- |
| Sr. No | Name of report | Frequency |
| 1 | Daily | Every day (Excluding Saturday and Sunday). |
| 2 | Monthly Sales | 1st of every month for preceding month. |
| 3 | Weekly Dashboard | Every Monday |
| 4 | Monthly Dashboard | 1st of every month for preceding month. |
| 5 | Marketing Dashboard | Sent with weekly as well as monthly report |

# Daily Report

## Structure

This report provides an overview of key metrics and sales data for the day. Report frequency is daily since May 17th. The report is sent for preceding day. For non-business days, the daily report should be consolidated with the earliest available report that will be sent after the non-business period. The following information is included:

* **Number of orders "Single Buy"**:
  + This represents the number of individual orders placed by customers who made a single purchase on that day.
* **Number of Subscriptions:** 
  + This indicates the number of subscription orders received during the specified period.
* **Order Sent to Knipper:** 
  + This shows the total number of orders that have been sent to Knipper for processing or fulfillment.
  + Usually, it is sum of Number of orders "Single Buy" and Number of Subscriptions.
* **Order Status Received from Knipper:**
  + This column represents the number of orders for which a status update has been received from Knipper.
* **Total Sales:** 
  + This indicates the total sales generated during each day of the specified period. The figures are given in dollar amounts. This is the sum of all the order total for particular date.
* **Payout Received - Total:** 
  + This column represents the total payout received, which is the amount of money received from sales for particular date.

This report provides valuable insights into the daily order trends, subscription orders, fulfillment status, sales performance, and payout received.

**Sample Report:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 16-May | 17-May | 18-May | 19-May | 20-May |
| **Number of orders "Single Buy"** |  |  |  |  |  |
| **Number of Subscriptions** |  |  |  |  |  |
| **Order Sent to Knipper** |  |  |  |  |  |
| **Order Status Received from Knipper** |  |  |  |  |  |
| **Total Sales** |  |  |  |  |  |
| **Payout Received - Total** |  |  |  |  |  |

## Source of data

* The data for this report can be sourced from Shopify.
* Orders Data Path: Shopify > Orders > Filter > Date > Select required date for the day.
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
* Order Status Received Data Path: Shopify > Apps > FulfillEO app > History > OrderStatusExport.csv
  + Count the number of orders for which we received status.
  + Direct Link: <https://preservision.myshopify.com/admin/apps/fulfilleo/dashboard>
* Payout Data Path: Shopify > Finances > Payouts > Select the date for data
  + Direct Link: <https://preservision.myshopify.com/admin/payments/payouts?selectedView=all>

# Monthly Sales Tax Report

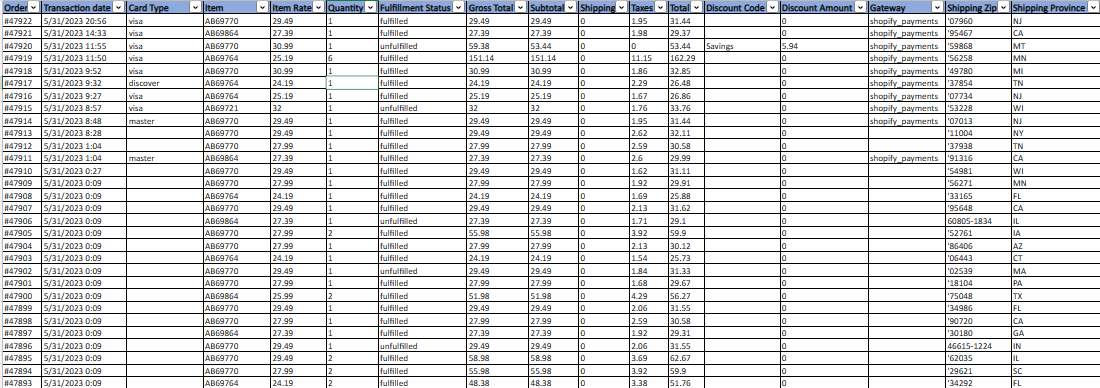
## Structure

The provided report consists of several columns containing order-related information. The monthly report will be sent on the first business day of each month, or the following business day if the first day is a non-business day for preceding month’s sales. Here's a description of each column:

* **Order:** Represents the order number or ID associated with each transaction.
* **Transaction Date:** Indicates the date and time when the transaction took place.
* **Card Type:** Specifies the type of credit or debit card used for the payment.
* **Item:** Refers to the SKU of specific item or product purchased.
* **Item Rate:** Represents the rate or price of each item.
* **Quantity:** Indicates the quantity of items purchased in each order.
* **Fulfillment Status:** Describes whether the order has been fulfilled or is still pending.
* **Gross Total:** Represents the sum of Subtotal and Discount Amount.
* **Subtotal:** Refers to the subtotal cost of the items in the order before adding taxes or shipping charges.
* **Shipping:** Represents the shipping cost associated with the order.
* **Taxes:** Indicates the total tax amount applied to the order.
* **Total:** Represents the final total amount paid by the customer, including all costs and discounts.
* **Discount Code:** Specifies any discount code applied to the order.
* **Discount Amount:** Represents the total amount discounted from the order due to the applied discount code.
* **Gateway:** Refers to the payment gateway used for processing the transaction.
* **Shipping Zip:** Indicates the ZIP or postal code associated with the shipping address.
* **Shipping Province:** Specifies the province or state associated with the shipping address.

This report provides an overview of various orders, their transaction details, fulfillment status, and associated costs.

**Sample Report:**



## Source of data

* The data for this report can be sourced from Shopify.
* We need two data from Shopify.
* Data Path 1: Shopify > Orders > Export > Orders by date > Select 1st and last dates for the month > Export orders
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
  + Data Received as: orders\_export.csv
* Data Path 2: Shopify > Orders > Export > Orders by date > Selected 1st and last dates for the month > Export transactions histories
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
  + Data Received as: transactions\_export.csv

## Data Transformation

The reports received via email contain raw data, but we only require specific details. Below is a description of each column, either directly from the raw data or modified based on the provided information:

* **Order:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Name
* **Transaction Date:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Paid at
* **Card Type:**
  + Source: transactions\_export.csv
  + Column Name from orders.export.csv: Card Type
* **Item:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Lineitem sku
* **Item Rate:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Lineitem price
* **Quantity:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Lineitem quantity
* **Fulfillment Status:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Fulfillment Status
* **Gross Total:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Subtotal + Discount Amount
* **Subtotal:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Subtotal
* **Shipping:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Shipping
* **Taxes:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Taxes
* **Total:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Total
* **Discount Code:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Discount Code
* **Discount Amount:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Discount Amount
* **Gateway:**
  + Source: transactions\_export.csv
  + Column Name from orders.export.csv: Gateway
* **Shipping Zip:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Shipping Zip
* **Shipping Province:**
  + Source: orders.export.csv
  + Column Name from orders.export.csv: Shipping Province

# Weekly Dashboard Report

## Structure

The report is structured into separate dashboards for each brand, following the same format. Each brand dashboard includes the following columns:

* **BrandName:**
  + Indicates the item SKU for mentioned brand.
* **Item Name:**
  + Provides the description or name of the item.
* **Dollars:**
  + Represents the total sales in dollars for each item in particular week.
* **% Chg vs. PP:**
  + Shows the percentage change in sales in dollars compared to the previous period.
  + Formula:
* **Units:**
  + Indicates the total number of units sold for each item In particular week.
* **% Chg vs. PP:**
  + Shows the percentage change in sales in units compared to the previous period.
  + Formula:
* **% Subscriber:**
  + Represents the percentage of sales attributed to subscribers.
* **% Single Purchase:**
  + Indicates the percentage of sales attributed to single purchases.

The report provides an overview of the sales performance for each item, including the total sales, percentage change, units sold, and the distribution between subscribers and single purchases.

**Sample Data:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| DASHBOARD - Weekly - W22 | | | | | | | |
| PreserVision | **Item Name** | **Dollars** | **% Chg vs. PP** | **Units** | **% Chg vs. PP** | **% Subscriber** | **% Single Purchase** |
| AB69864 |  |  |  |  |  |  |  |
| AB69770 |  |  |  |  |  |  |  |
| AB69764 |  |  |  |  |  |  |  |
| AB69721 |  |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |  |

## Source of data

* The data for this report can be sourced from Shopify.
* Data Path 1: Shopify > Orders > Export > Orders by date > Select dates from start of previous week and end of current week(Total 2 weeks data) for which the dashboard needs to generated > Export orders
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
  + Data Received as: orders\_export.csv

## Data Transformation

In order to derive the weekly dashboard data, a transformation process is required for the source data. The source data contains extraneous information that is not pertinent to the analysis. To obtain the desired final dataset, the following procedural steps should be implemented:

* Open the "orders\_export.csv" file using a spreadsheet software.
* Review the column headers and locate the columns that need to be extracted or modified:
  + Column A: Name,
  + Column B: Financial Status,
  + Column C: Paid at,
  + Column E: Subtotal,
  + Column F: Shipping,
  + Column G: Taxes,
  + Column H: Total,
  + Column I: Discount Code,
  + Column J: Discount Amount,
  + Column K: Lineitem quantity,
  + Column L: Lineitem name,
  + Column M: Lineitem sku,
  + Column N: Tags.
* Insert a new column for the "Gross Total"(Column D) next to the "Paid at" column.
* In the first row of the "Gross Total" column, enter the formula "=Subtotal + Discount Amount". Drag the formula down to calculate the gross total for each row.
* Insert a new column for the "Subscription"(Column O) next to the "Tags" column.
* In the first row of the "Subscription" column, enter the formula "=IF(ISNUMBER(SEARCH("Subscription", N2)), TRUE, FALSE)". Adjust the "N2" reference if necessary to match the column where the tags are located. Drag the formula down to determine if each order is a subscription or not.
* Insert a new column for "Year"(Column P) next to the "Subscription" column.
* In the first row of the "Year" column, enter the formula "=YEAR(C2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to extract the year for each transaction.
* Insert a new column for "Month"(Column Q) next to the "Year" column.
* In the first row of the "Month" column, enter the formula "=MONTH(C2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to extract the month for each transaction.
* Insert a new column for "Week"(Column R) next to the "Month" column.
* In the first row of the "Week" column, enter the formula "=WEEKNUM(C2, 2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to calculate the week number for each transaction.
* Save the changes to the "orders\_export.csv" file.

## Notes

The data preparation process for generating the weekly dashboard involves several key steps to ensure accuracy and relevance. Please follow the professional guidelines below:

* Apply a filter to the final data to refine the dataset specifically for the weekly calculations.
* Utilize the drop-down filter option in the "Paid at" column and select "Blanks" to isolate orders with missing payment information.
* Remove all orders associated with the "Blanks" filter, as they are not relevant to the analysis.
* Reset the filter in the "Paid at" column to include all relevant data again.
* Select the current year, month, and week by filtering the "Year," "Month," and "Week" columns accordingly.
* Choose a specific SKU from the "Lineitem sku" column and carefully record the necessary values for input into the weekly dashboard.
* Reset all filters to ensure a clean and accurate starting point for the next iteration.
* Repeat these steps for each SKU, following the same meticulous process.
* By adhering to these professional procedures, the final data for the weekly dashboard will be properly refined and suitable for accurate analysis and reporting.

# **Monthly Dashboard Report**

## Structure

The report is structured into separate dashboards for each brand, following the same format. Each brand dashboard includes the following columns:

* **BrandName:**
  + Indicates the item SKU for mentioned brand.
* **Item Name:**
  + Provides the description or name of the item.
* **Dollars:**
  + Represents the total sales in dollars for each item in particular week.
* **% Chg vs. PP:**
  + Shows the percentage change in sales in dollars compared to the previous period.
  + Formula:
* **Units:**
  + Indicates the total number of units sold for each item In particular week.
* **% Chg vs. PP:**
  + Shows the percentage change in sales in units compared to the previous period.
  + Formula:
* **% Subscriber:**
  + Represents the percentage of sales attributed to subscribers.
* **% Single Purchase:**
  + Indicates the percentage of sales attributed to single purchases.

The report provides an overview of the sales performance for each item, including the total sales, percentage change, units sold, and the distribution between subscribers and single purchases.

**Sample Data:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| DASHBOARD - Monthly – May | | | | | | | |
| PreserVision | **Item Name** | **Dollars** | **% Chg vs. PP** | **Units** | **% Chg vs. PP** | **% Subscriber** | **% Single Purchase** |
| AB69864 |  |  |  |  |  |  |  |
| AB69770 |  |  |  |  |  |  |  |
| AB69764 |  |  |  |  |  |  |  |
| AB69721 |  |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |  |

## Source of data

* The data for this report can be sourced from Shopify.
* Data Path 1: Shopify > Orders > Export > Orders by date > Select dates from 1st of previous month and last date of current month (Total 2 months data) for which the dashboard needs to generated > Export orders
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
  + Data Received as: orders\_export.csv

## Data Transformation

In order to derive the monthly dashboard data, a transformation process is required for the source data. The source data contains extraneous information that is not pertinent to the analysis. To obtain the desired final dataset, the following procedural steps should be implemented:

* Open the "orders\_export.csv" file using a spreadsheet software.
* Review the column headers and locate the columns that need to be extracted or modified:
  + Column A: Name,
  + Column B: Financial Status,
  + Column C: Paid at,
  + Column E: Subtotal,
  + Column F: Shipping,
  + Column G: Taxes,
  + Column H: Total,
  + Column I: Discount Code,
  + Column J: Discount Amount,
  + Column K: Lineitem quantity,
  + Column L: Lineitem name,
  + Column M: Lineitem sku,
  + Column N: Tags.
* Insert a new column for the "Gross Total"(Column D) next to the "Paid at" column.
* In the first row of the "Gross Total" column, enter the formula "=Subtotal + Discount Amount". Drag the formula down to calculate the gross total for each row.
* Insert a new column for the "Subscription"(Column O) next to the "Tags" column.
* In the first row of the "Subscription" column, enter the formula "=IF(ISNUMBER(SEARCH("Subscription", N2)), TRUE, FALSE)". Adjust the "N2" reference if necessary to match the column where the tags are located. Drag the formula down to determine if each order is a subscription or not.
* Insert a new column for "Year"(Column P) next to the "Subscription" column.
* In the first row of the "Year" column, enter the formula "=YEAR(C2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to extract the year for each transaction.
* Insert a new column for "Month"(Column Q) next to the "Year" column.
* In the first row of the "Month" column, enter the formula "=MONTH(C2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to extract the month for each transaction.
* Insert a new column for "Week"(Column R) next to the "Month" column.
* In the first row of the "Week" column, enter the formula "=WEEKNUM(C2, 2)". Adjust the "C2" reference if necessary to match the column where the paid at dates are located. Drag the formula down to calculate the week number for each transaction.
* Save the changes to the "orders\_export.csv" file.

## Notes

The data preparation process for generating the weekly dashboard involves several key steps to ensure accuracy and relevance. Please follow the professional guidelines below:

* Apply a filter to the final data to refine the dataset specifically for the weekly calculations.
* Utilize the drop-down filter option in the "Paid at" column and select "Blanks" to isolate orders with missing payment information.
* Remove all orders associated with the "Blanks" filter, as they are not relevant to the analysis.
* Reset the filter in the "Paid at" column to include all relevant data again.
* Select the current year and month by filtering the "Year" and "Month" columns accordingly.
* Choose a specific SKU from the "Lineitem sku" column and carefully record the necessary values for input into the weekly dashboard.
* Reset all filters to ensure a clean and accurate starting point for the next iteration.
* Repeat these steps for each SKU, following the same meticulous process.

By adhering to these professional procedures, the final data for the weekly dashboard will be properly refined and suitable for accurate analysis and reporting.

# Marketing Dashboard Report

## Structure

### Section 1: Total Site Traffic and Traffic Sources

The first section of the report focuses on the total site traffic and the sources from which the traffic originates. It provides the following information:

* Total Site Traffic:
  + The total site traffic Sum of all the traffic sources
* Traffic Sources:
  + The report lists different traffic sources and their corresponding amounts of traffic.

### Section 2: Site Conversion Rate and Drop-off Analysis

The second section of the report focuses on the site conversion rate and analyzes the drop-off rates for specific pages or actions. It provides the following information:

* Site Conversion Rate:
  + The site conversion rate is reported to be 41.92%, representing the percentage of site visitors who successfully complete a desired action, such as making a purchase or filling out a form.
* Drop-off Analysis:
  + The report highlights specific pages or actions where users tend to drop off or exit the website. It provides the drop-off rates for each page or action.

**Sample Data:**

|  |  |  |  |
| --- | --- | --- | --- |
| Total Site Traffic: | 109 | Site Conversion Rate: | 0.42 |
| Source: |  | **Drop-off:** |  |
| direct | 55 | Bausch & Lomb Marketplace | PreserVision | 0.00 |
| google | 21 | Contact Us | PreserVision | 4.00 |
| bing | 14 | Customer Care | PreserVision | 2.00 |
| duckduckgo | 10 | Log In | PreserVision | 0.00 |
| bausch | 4 | Our Products | PreserVision | 1.00 |
| yahoo! | 2 | Refund Policy | PreserVision | 0.00 |
| aol | 2 | Shopping Cart | PreserVision | 1.00 |
| unattributed | 1 | Subscriptions FAQ | PreserVision | 2.00 |
|  |  | Thank you for registering! | PreserVision | 1.00 |
|  |  | Welcome | PreserVision | 681.00 |

## Source of data

### Section 1:

* + Section 1 of the report is sourced from Google Analytics > Reports > Acquistion > User Acquistion > Select First user source/medium section.
  + Direct Link: [Analytics | User acquisition: First user source / medium (google.com)](https://analytics.google.com/analytics/web/?authuser=1#/p367321531/reports/explorer?params=_u..nav%3Dmaui%26_r.explorerCard..seldim%3D%5B%22firstUserSourceMedium%22%5D&r=lifecycle-user-acquisition-v2&ruid=lifecycle-user-acquisition-v2,life-cycle,acquisition&collectionId=life-cycle)
  + Select correct date as per requirement.

### Section 2:

* + Section 2 of the report is sourced from Google Analytics' "Explore" section, particularly the "Views and Exits" data.
  + It focuses on the site conversion rate and the drop-off rates for specific pages or actions.
  + Direct Link: [Analytics (google.com)](https://analytics.google.com/analytics/web/?authuser=1#/analysis/p367323812/edit/ptx-RhT_QDq8hGEOOA5jcA)

This report presents a comprehensive overview of the website's performance, starting with the total site traffic and traffic sources in Section 1, followed by the site conversion rate and drop-off analysis in Section 2. By examining these metrics, businesses can gain valuable insights to optimize their marketing strategies, enhance user experience, and improve conversion rates on their website.

## Notes

* For Section 2 of the Marketing Report, the relevant data should be extracted from the source data. Specifically, the top Page Title and Screen Name, as well as the number of Exits, should be copied and inserted into Section 2.
* By implementing these steps, the Marketing Report will be enhanced with accurate and relevant data, allowing for a comprehensive analysis of traffic sources and user behaviour on the website.

# Fulfilled and Unfulfilled Order Report

## Structure

This report appears to be a list of orders with relevant details. Here is a description of the columns:

1. Name: This column contains the order numbers.
2. Created at: It indicates the date and time when the order was created.
3. Exported date: This column shows the date and time when the order was exported.
4. Fulfillment Status: It indicates whether the order has been fulfilled or not.
5. Fulfilled at: This column would typically display the date and time when the order was fulfilled.
6. Days to Fulfill: It represents the number of days it took to fulfill the order. In this report, the value is empty for unfulfilled orders.
7. Total: This column displays the total cost of the order.
8. Lineitem quantity: It specifies the quantity of items ordered.
9. Lineitem sku: This column contains the SKU (stock keeping unit) or product code associated with each item.
10. Tags: It provides additional tags or labels associated with the order, such as "Exported," "signifyd approved," "Subscription," or "Subscription First Order."
11. Lineitem name: This column lists the names or descriptions of the items ordered.

Overall, this report provides information about the unfulfilled orders, including their order numbers, creation dates, export dates, total costs, quantities, SKUs, tags, and item details.

## 

## Source

* The data for this report can be sourced from Shopify.
* Data Path 1: Shopify > Orders > Export > Orders by date > Select dates That the report needs to generated > Export orders
  + Direct link: <https://preservision.myshopify.com/admin/orders?inContextTimeframe=today>
  + Data Received as: orders\_export.csv

## Data Transformation

1. Create new Excel sheet with the name “Orders Fulfillment Report- MMDD-MMDD”.
2. From orders\_export.csv copy below columns to “Orders Fulfillment Report- MMDD-MMDD” as mentioned in below sequence and rename as mentioned-
   1. Column A- Name: Name
   2. Column B- Created at: Created at
   3. Column C- Paid at: Exported date
   4. Column D- Fulfillment Status: Fulfillment Status
   5. Column E- Fulfilled at: Fulfilled at
   6. Column F- Days to Fulfill: Add empty column with formula - =IF(ISBLANK(E2), "Unfulfilled", DAYS(E2, C2))
   7. Column G- Total: Total
   8. Column H- Lineitem quantity: Lineitem quantity
   9. Column I- Lineitem sku: Lineitem sku
   10. Column J- Tags: Tags
   11. Column K- Lineitem name: Lineitem name
3. Add filters to all column.
4. Set Filter to column D Fulfillment Status to “Blank” and “Fulfilled”.
5. Delete all the data which is received after above filter.
6. Remaining is the report data to be sent.

# Promo Code Report

## Structure

## Source