# Advanced Sales Reports

## DOCUMENTATION GUIDE

IntelliPresta

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# Overview 1

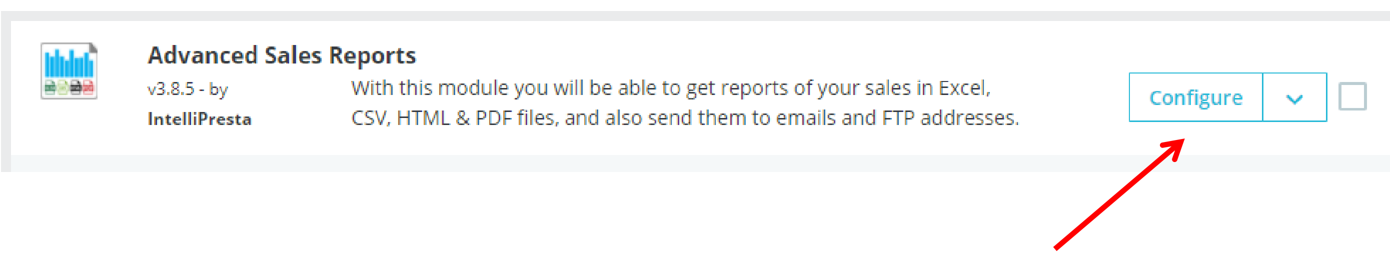
**Advanced Sales Reports** module helps you to get detailed reports about your sales in Excel, CSV, HTML and PDF formats. This way you can get all the information about your sales with one click! So, you will have reports for any period. Thanks to this customizable module, you can also send your sales in any of the formats above to any email(s) and/or FTP address(es) based on regular times, or send your new order automatically when it is placed by a customer or when the order's status changes.

## Features

- Easy Export
- User-Friendly Design
- Advanced Sorting & Filters
- Ability of Saving Changes
- Revenues by Different Criteria
- Automatic Export
- Scheduled Export
- Send Export File to Emails
- Upload Export File to FTP
- High-Quality Support

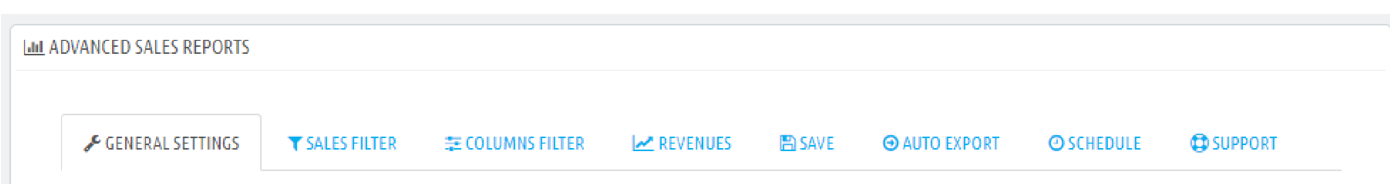
## Installation

Installation process is typical. Just upload & install, then configure! All the operations are implemented on the configuration page of the module.




## Sections

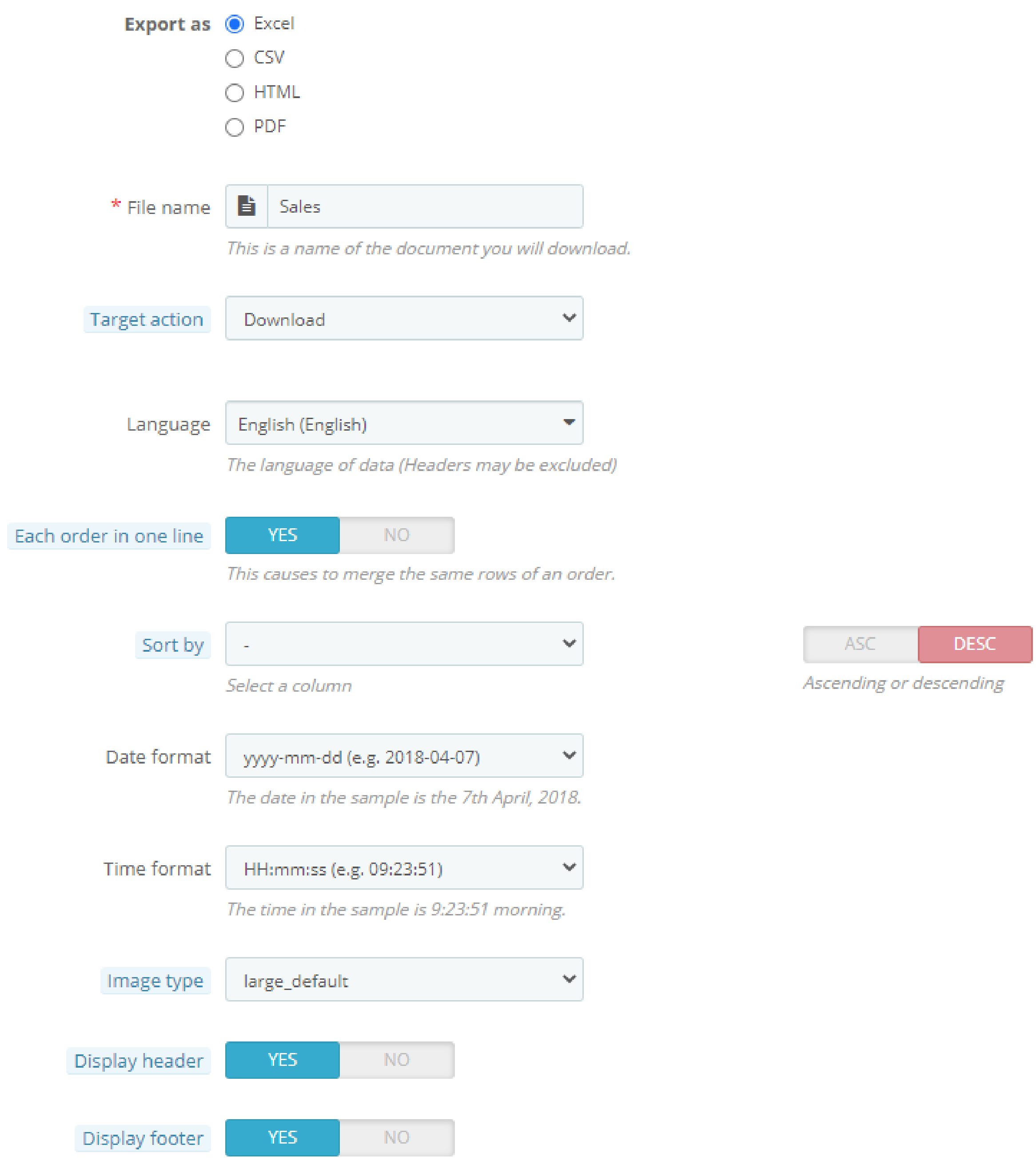
The module interface contains the following sections:



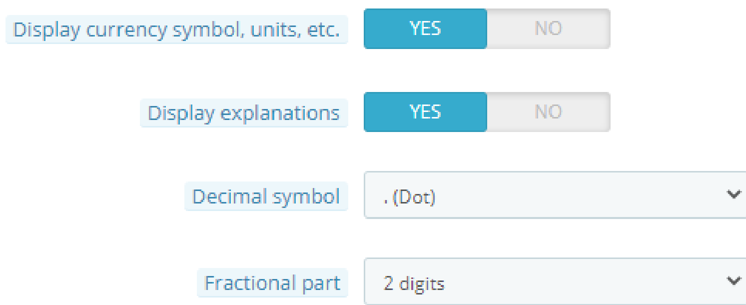
# General Settings 2

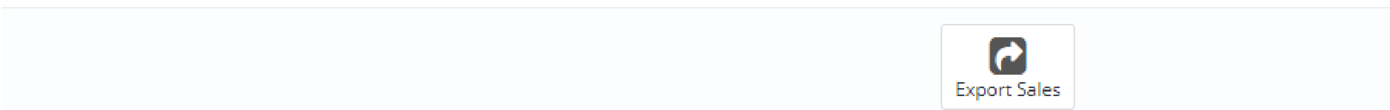
## GENERAL SETTINGS

This section contains the following interface. Let us explore what they function one by one.



# General Settings 2




**Export as**. This helps you to select the export file type. The current possible options are Excel, CSV, HTML and PDF file types.

**File name**. This is the file name of the export file. e.g. it can be Sales.xlsx (the extension will be added based on which format you are choosing for the export) depending on your choice.

**Target action**. You can download the current export file, send it to email or to FTP address. When you select "Email" and "FTP", corresponding inputs will appear. We will discuss these inputs on AUTO EXPORT section since the same inputs are there as well, but for the purpose of automatic export.

**Language**. You can choose among the languages installed on your shop. By default, the current language you use is selected.
**Note:** This is the language of only exported data. The interface language and the header of the export file will be in the language that you use currently.

**Each order in one line**. An order may contain more than one product. In this case all the non-product cells are repeated to match the products. By enabling this switch button, you will merge the repeated order (non-product) cells. The following picture illustrates this matter.

| Order ID | Product ID |
|---|---|
| 1 | 1 |
| | 5 |
| 2 | 2 |
| | 3 |
| | 4 |
| 3 | 6 |
| 4 | 7 |
| 5 | 8 |

| Order ID | Product ID |
|---|---|
| 1 | 1 |
| 1 | 5 |
| 2 | 2 |
| 2 | 3 |
| 2 | 4 |
| 3 | 6 |
| 4 | 7 |
| 5 | 8 |

**Sort By**. As its name suggests, it sorts by the selected column. The columns you see here are the selected columns to export on COLUMNS FILTER section. When you select/deselect a column on that section, you will notice that the selected column is added/removed here. The right switch button defines the sorting direction: ascending or descending. By default (if no selection), the data is sorted by Order ID in the descending order. **Note:** If a column of Product, Category, Brand, Supplier groups is selected in this select box, the "**Each order in one line**" button is automatically disabled. i.e. these cannot be enabled at the same time. Because when this button is on, we cannot sort by a column of these groups. You can see this from the first image above.

**Date format**. You can choose one format among the given selections for the date part of the date-time fields in the export file. The samples help you to decide easily.

**Time format**. Here you choose one format among the given for the time part of the date-time fields. There are samples here too.

**Image Type**. This is for the image types on the image URLs. The images exported in the file are always small images to avoid memory overhead. But for the URLs you can choose an option from this input.

**Display header**. Specifies if the columns names from COLUMNS FILTER section will be displayed as a header.

**Display footer**. If this button is enabled, the header is displayed at the footer as well.

**Display currency symbol, units, etc.** As the name suggests, you can choose to show currency symbols, units, etc. beside numbers.

**Display explanations**. There are some explanations at the bottom of some columns. These are typically margin columns under which how the margins are calculated are shown.

**Decimal symbol**. You can choose between dot and comma here for the factional numbers in the export file.

**Fractional part**. You can specify how many digits you want to keep after the decimal symbol for the fractional numbers.

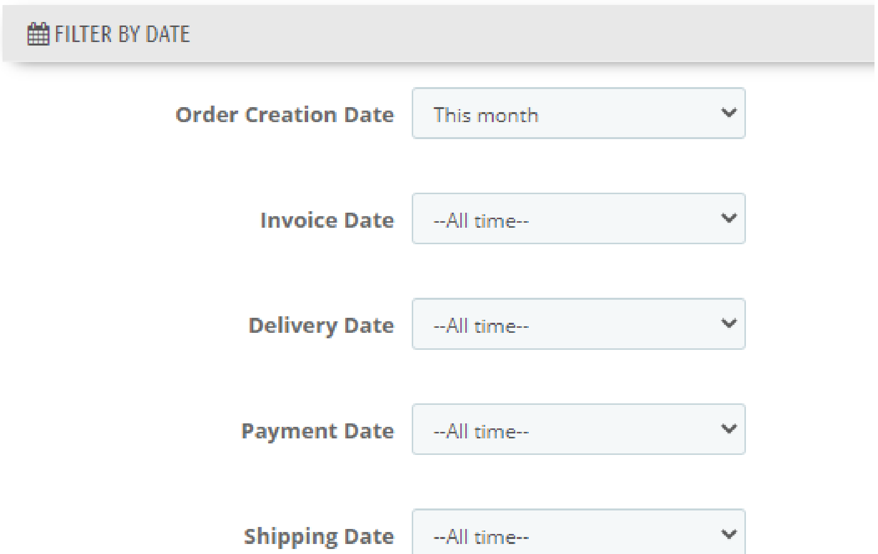
**Export Sales**. This button is available on all the sections.  When you click it, the sales will be exported. By default, the orders that have been placed during the current month will export. This value is preselected to "This month" on SALES FILTER section.

# Sales Filter 3

## SALES FILTER

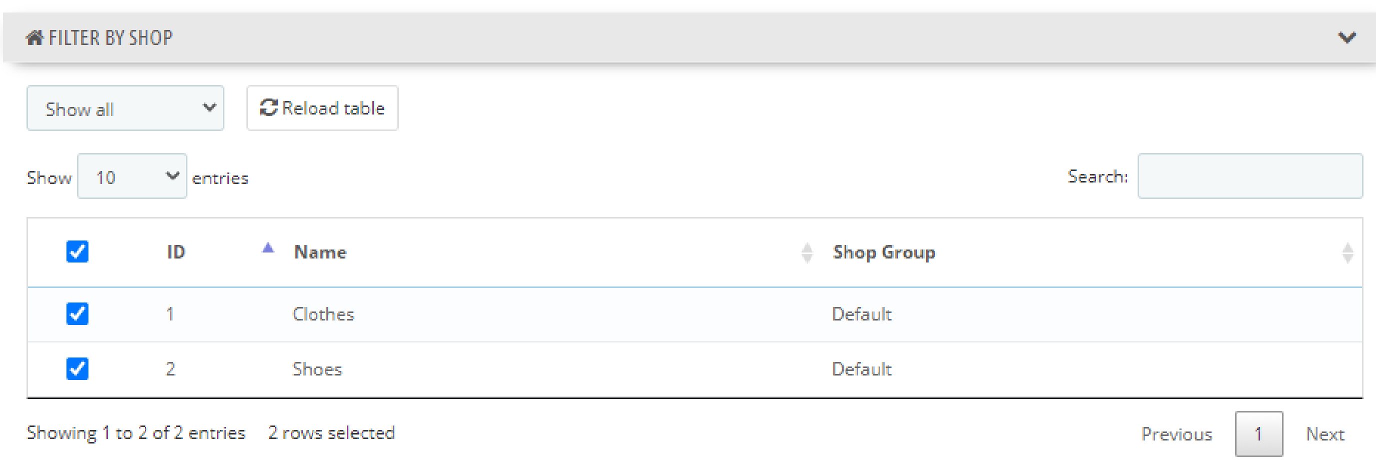
This section allows you to filter the export data. There are many advanced filters here. All the filters, except the first one, are in the collapsed state. **Expand all** (**Collapse all**) button expands/collapses all the filter sections. If you want to expand/collapse an individual filter, just click on its name. Let us monitor this section.

**Filter By Date**. You can filter your sales by their creation date, invoice creation date, delivery date, payment date and shipping date.



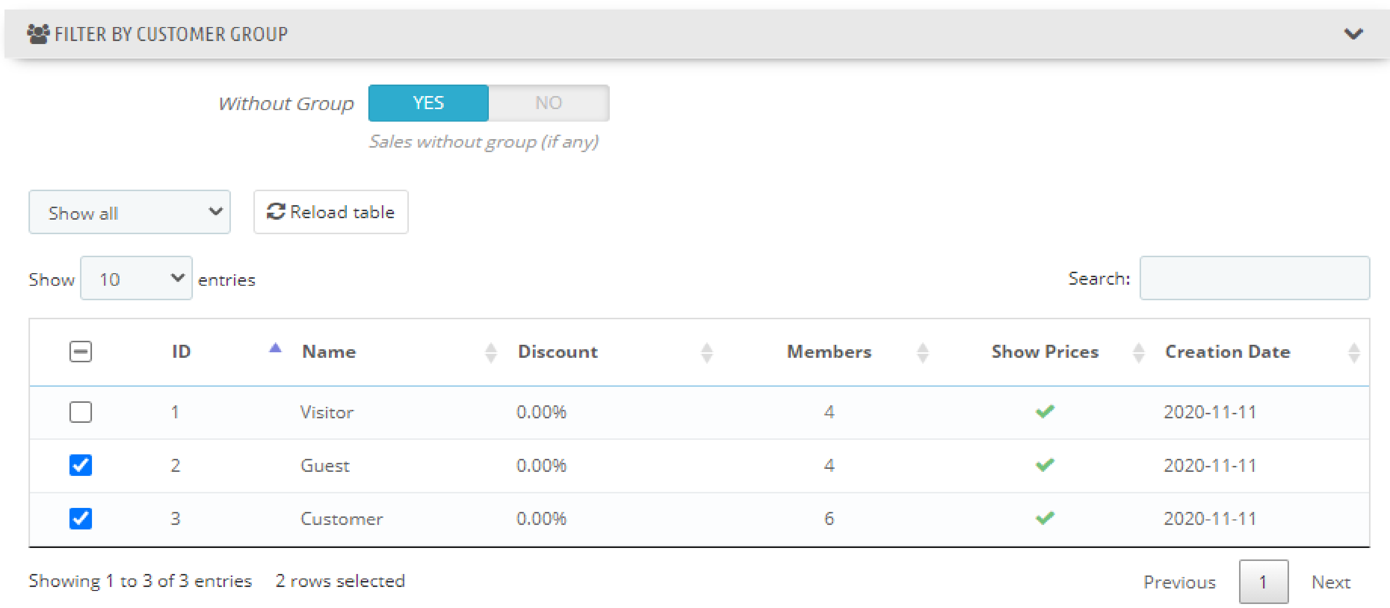

The possible values for each input are “All time”, “Today”, “Last 24 hours”, “Yesterday”, “This week”, “Last week”, “This month”, “Last month” and “Select date” which means you can select a custom date range.

**Filter By Shop**. You can filter your sales (orders) by shops. You can see how many sales you have in each shop. Most filters are displayed as tables.

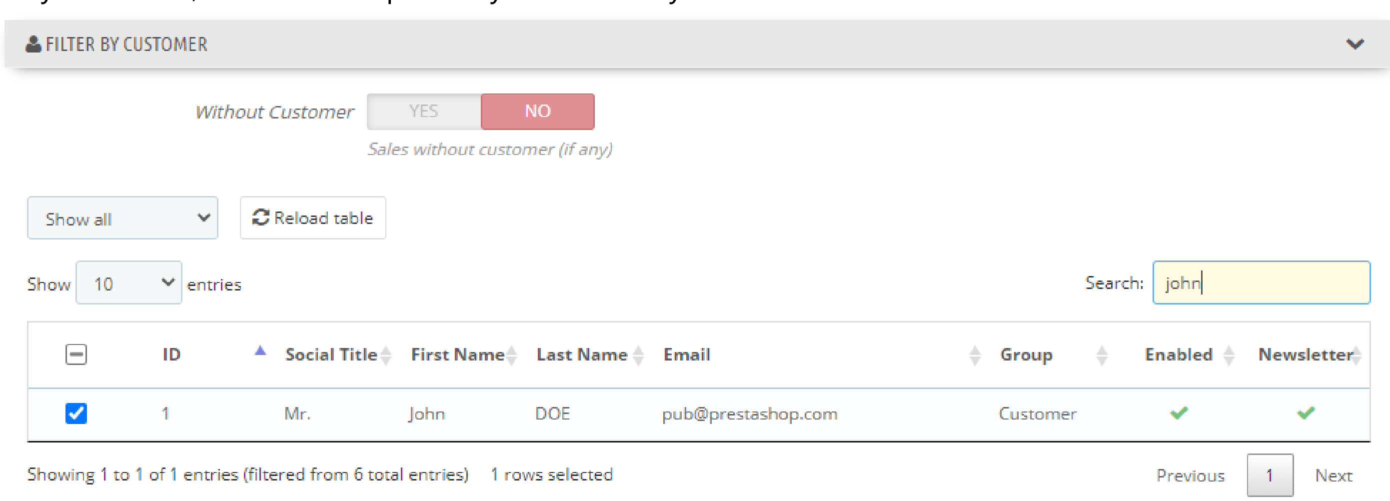


As you can see, you can select, deselect, sort, filter and do other things on the shops as well as the other tabular filters. When all the shops are selected or deselected, then the orders will **not** be filtered by shops. Because if they are filtered when they are all deselected, then no data will export. That's why we don't take them into account when all they are selected or deselected. The same this is true about all the other tabular filters.

**Filter By Customer Group**. You can filter your data by the customer groups available on your shop. As you can see on the following image there is a "Without Customer Group" button. If this button is on, this means if you have any orders that were placed by a user and that user does not belong to any group, export these types of orders as well. When this button is on and all the customer groups are selected, or this button is off and all the groups are deselected, the export data will **not** be filtered by the customer group.

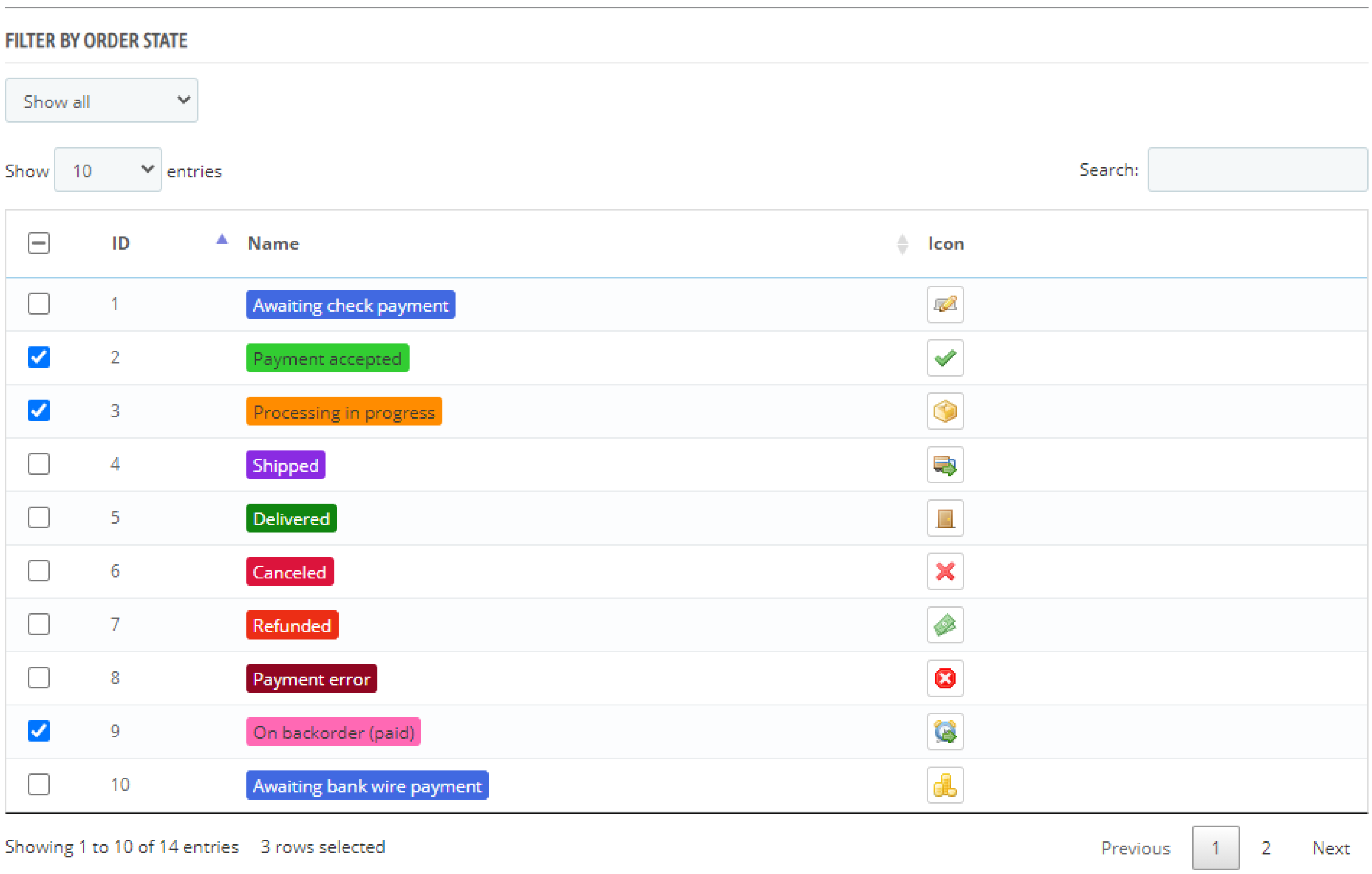



**Filter By Customer**. The following picture shows how to filter the sales by customer. Nothing different here. As you can see, we want to export only the orders by John Doe.



**Filter By Order**. Filter the sales by the orders themselves.

**Filter By Order State**. This filter helps you to filter by the current order states. In the example below we intend to export only the orders that have one of "Payment Accepted", "Processing in progress", "On backorder (paid)" states currently.



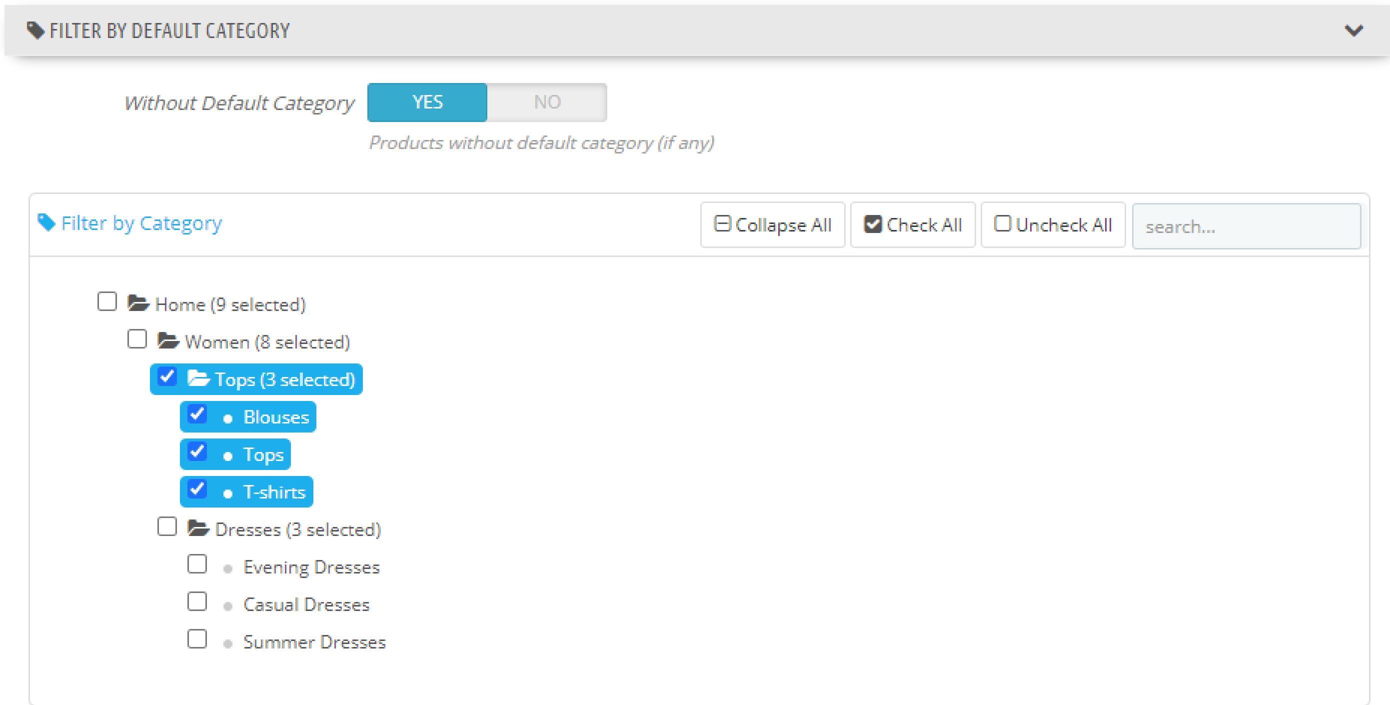

**Filter By Payment Method.** With this filter you will be able to filter orders by which payment method they have been placed. All the rest tables are similar. So, we think there is no need to attach screenshots anymore.

**Filter By Cart Rule**. Allows you to filter the sales by discounts.

**Filter By Carrier**. You can filter the sales by order carrier. i.e. by which carriers they have been carried.

**Filter By Product**. Here you can filter your sales by specific products.

**Filter By Default Category**. You can filter the sold products (this means their associated sales also will be filtered) by their default categories.




**Filter By Attribute**. You can filter your sold products (their orders will be filtered too) by attributes. By checking (unchecking) certain attributes, you instruct the module to export only the sales having the products that have the checked (unchecked) attributes.

**Filter By Feature**. This is like “Filter By Attribute”.

**Filter By Brand**. Brands are related to products, not orders. So, filtering by brands means you are filtering the products by their brands and only the orders that have these filtered products will be exported.

**Filter By Default Supplier**. This is similar to “Filter By Brand”. You can filter the products by their default suppliers and only the orders that contain these filtered products will be exported.

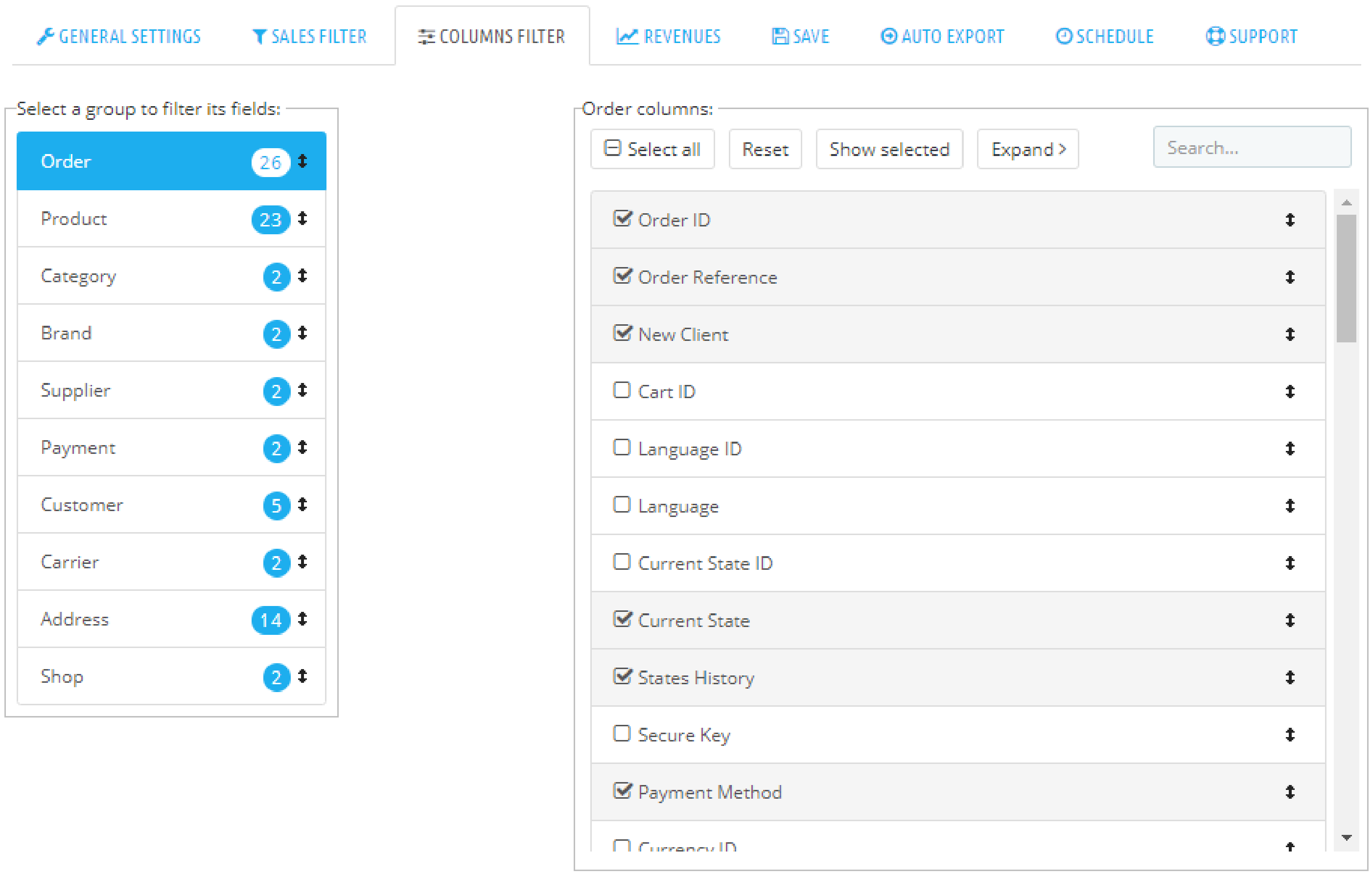
**Filter By Currency.** Although this is rare, your shop can use multiple currencies and the orders might be placed with different currencies. So, you may want to export the orders created with euro.

**Note:** All the filters are combined with “AND” logic.

# Columns Filter 4

## COLUMNS FILTER

In this section you can filter the fields (columns) that you want to export. By default, the most important columns (this is our subjective opinion) are pre-selected. Columns are divided into several categories (groups) based on what information they carry. On the left side there are column categories, on the right side the columns of the active category are located. You can click the category on the left side of which columns you want to see. The active category will have the blue color.



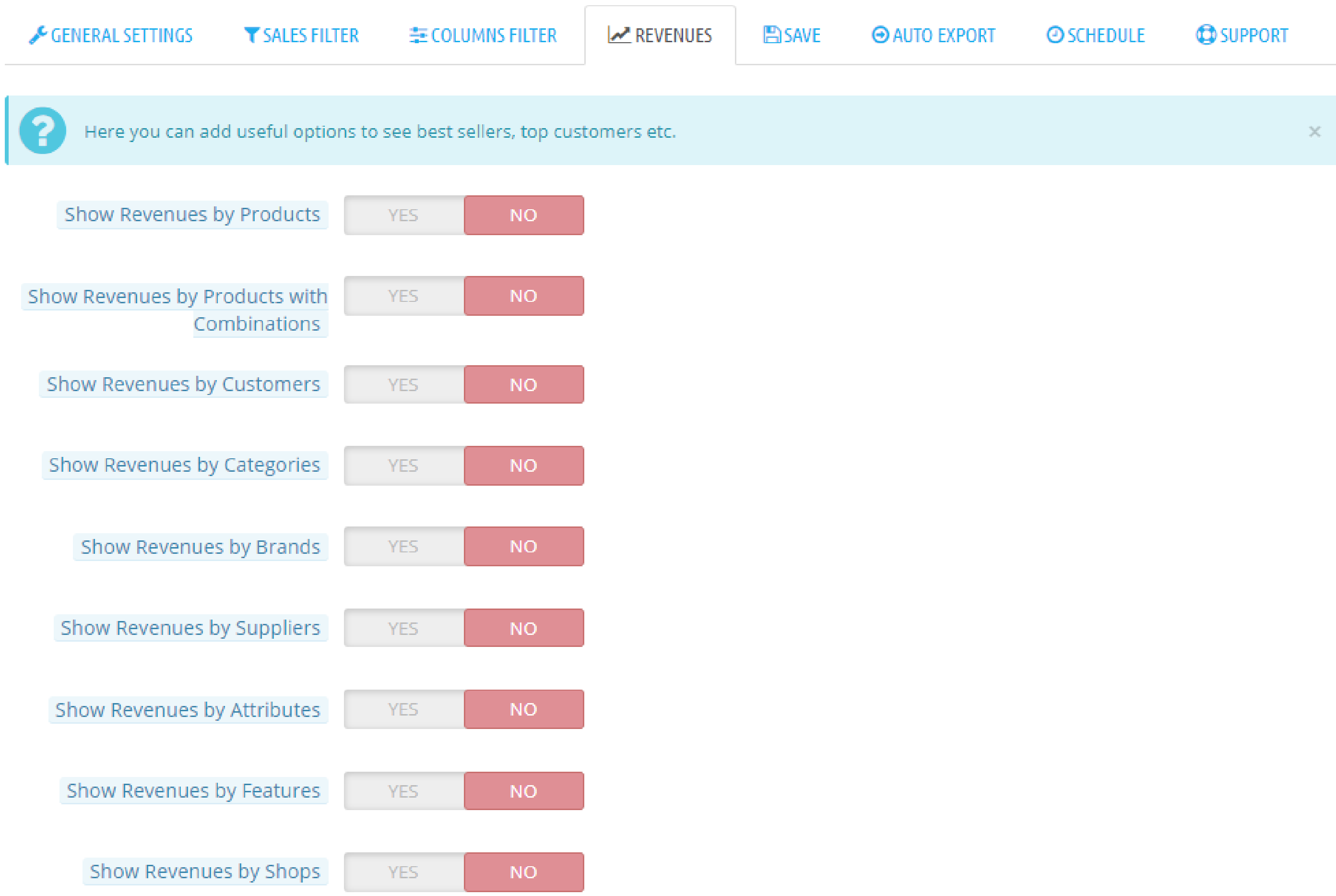

The number at the right side of each category indicates how many selected columns it has. You can select any column that you want to export by just clicking on it. The selected columns have checked checkmarks and their color are grey. Both the categories and the columns has drag-and-drop feature which enables you to rearrange their orders in their group. **Select all** button selects/deselects all the visible fields. **Reset** resets the selection. **Show selected** (after clicking it becomes **Show all**) button shows only the selected columns. **Expand** button cancels the scrollbar of the visible columns and expands them. So, all the visible columns are shown at the same time. **Search** field helps you to filter the visible columns.

**Note:** All the buttons and the search field at the top of the columns list operate only on the visible columns. They do not affect the invisible columns of the other groups.

# Revenues 5

## REVENUES

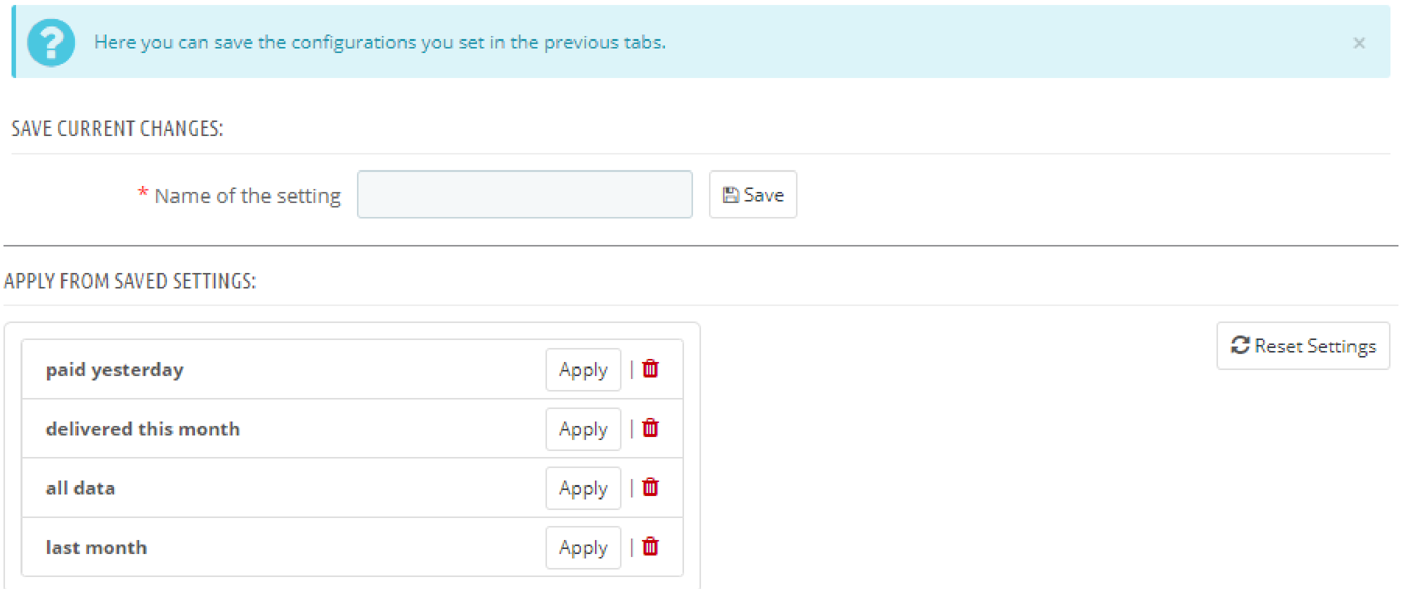
One of the coolest things of this module is to show summarized revenues. Each revenue is displayed on a separate sheet in Excel, but sequentially in the other formats. This section contains the following interface. By default, the revenues are disabled. You can enable whichever you want.



# Save 6

## SAVE

On this section you can save all the changes you did on the previous sections. This saves you from doing the same things again and again.

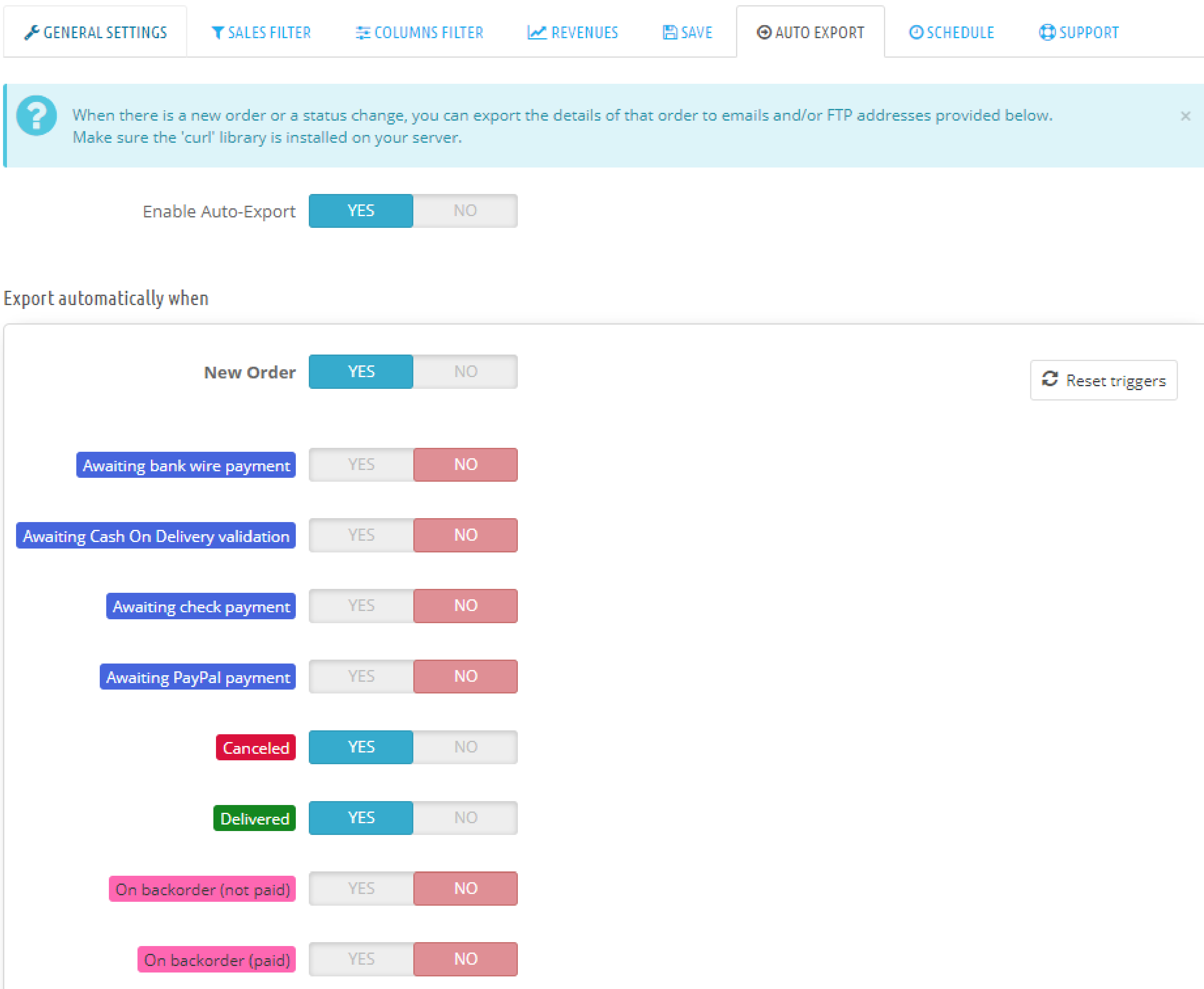



Just enter the name of you changes (setting) and save. For example, you often need to export the paid orders of yesterday. After filtering according to these conditions, you can type "paid yesterday" in the setting input, then click **Save**. After clicking the **Save** button, the new setting will be added to the settings list below. Next time when you come to the module's page, you don't need filter the sales by selecting "Yesterday" among the "Filter By Date" options and checking only the "Payment Accepted" from "Filter By Order State" table. Just click the **Apply** button of corresponding setting and that's done! Also, you can delete any setting by clicking its "trash" icon. **Reset Settings** button resets all the changes you have done on the previous sections. As if it reloads the page to its initial state.

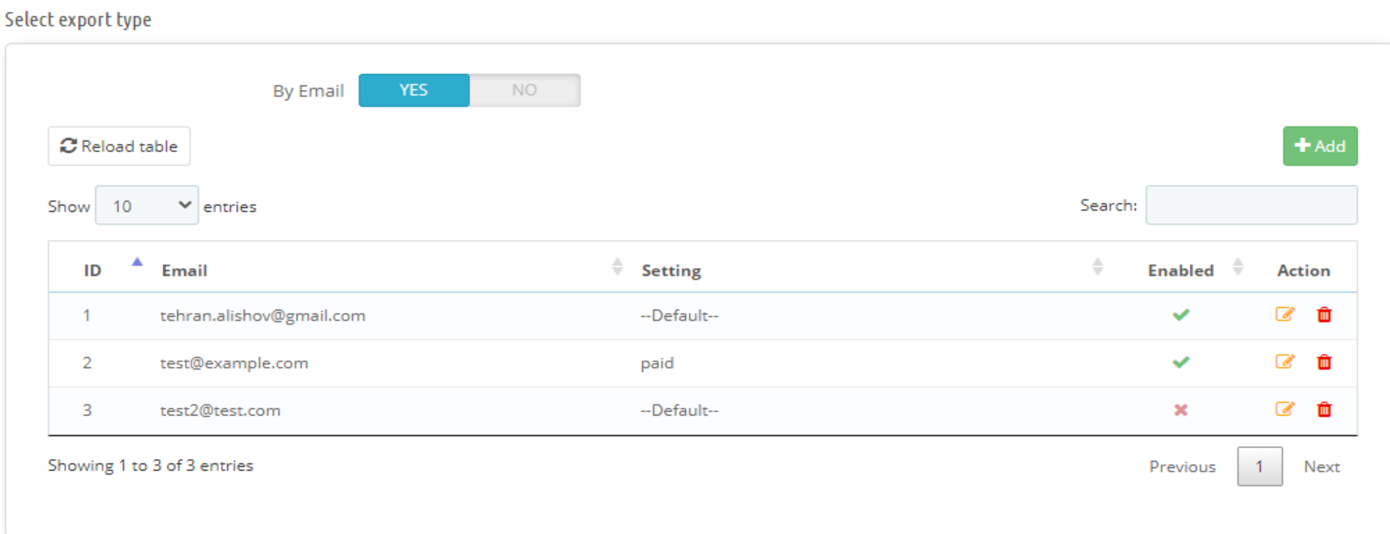
# Auto Export 7

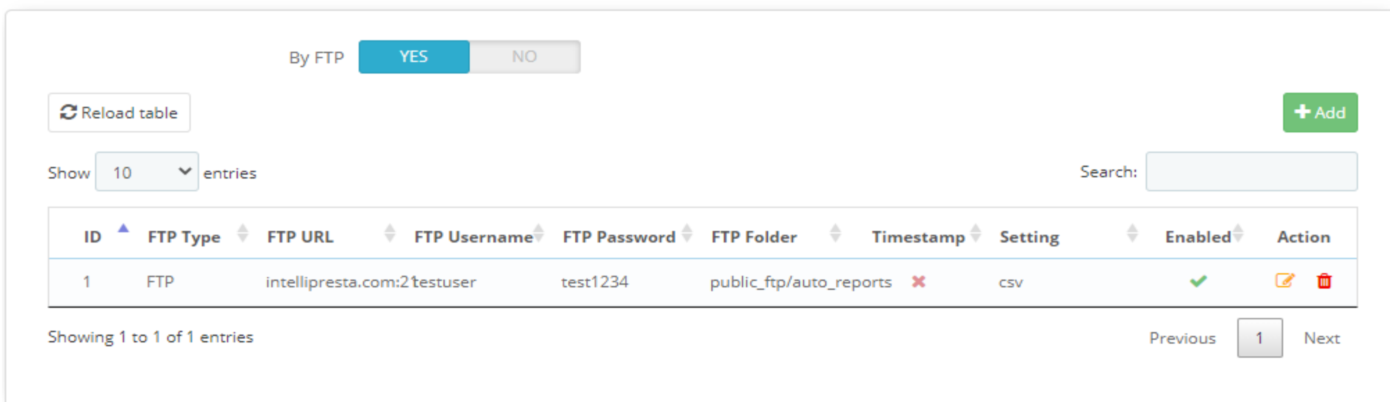
## AUTO EXPORT

If you want to send an email automatically with the attachment of the export file containing an order when it is placed by a customer or its state changes, or you want to upload that file to FTP address, then this section is for you. Let's explore what these elements mean one by one.

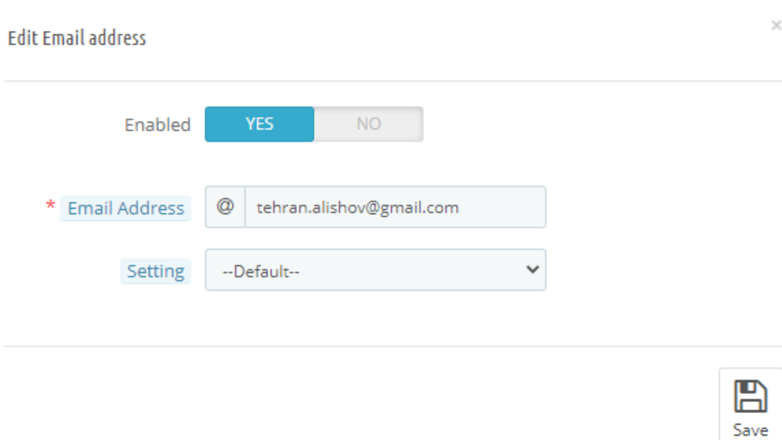



**Enable Auto-Export**. When you enable this button, these areas will appear: triggers and export ways. The triggers are the events that you can use to export the corresponding order when one or more of these events happens. The first trigger is "**New Order**". If enabled, this means when your customer places a new order, it will be sent to the email(s) and/or FTP address depending on your configuration below. The rest triggers are the order states, i.e. you will receive the export file of the order when its status changes. **Reset triggers** button enables the first trigger and disables all the rest triggers. The export ways are **By Email** and **By FTP**.




**By Email**. By switching this button on, the appropriate table will appear. You can add any of emails here, edit, disable, and delete them. When you click **Add** button and **Edit** icon, the following modal will appear.



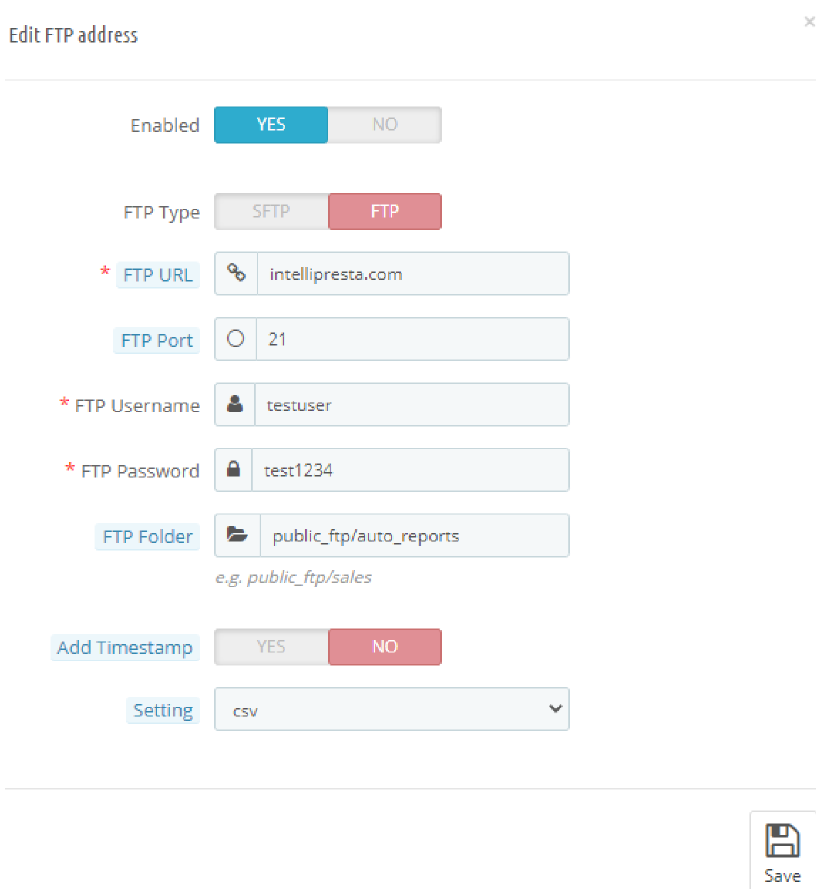
**Enabled**. This just enables or disables the existing email address.

**Emails Address**. Type an email that you want the new or status-changed order file to be sent automatically.

**Setting**. This selection box contains "--Default--" value as its first option and the settings from SAVE section. As you know, the default value means "all the orders of the current month with the pre-selected columns in Excel format" in this module.

**Save**. Don't forget to click **Save** button to save the changes at the end.

**By FTP**. By switching on this button, the corresponding fields below will fade in and you will receive the export file of new order on the FTP address that you filled in the following inputs. When you click **Add** button and **Edit** icon, the following modal will appear.




**FTP Type**. You can choose between the **FTP** and **SFTP** depending on what type of FTP you use.

**FTP URL**. You can type the FTP domain or IP address here.

**FTP Port**. The port of the FTP URL. If you omit this input, 21 for FTP and 22 for SFTP will be taken by default.

**FTP Username**. A username to connect to FTP address. The username **should not** contain "@" symbol and FTP URL. The module will add it when creating the connection.

**FTP Password**. The password of the username to connect to FTP address.

**FTP Folder**. A folder name on the FTP address where you want to upload the automatic file. For example, if you type "public_ftp/auto_sales" here and a new order with ID 72 is placed, then you will get "Order_72.xlsx" in "public_ftp/auto_sales" folder or another file type depending on your selected setting from **Setting** field. If you omit this text input, "public_ftp" will be taken by the module by default.

**Add Timestamp**. When this button is enabled, the current timestamp will be added to the end of the file name on FTP address. For instance, "Order_72_2020-12-25 145623.xlsx". It is typically for preventing from overwriting the file each time the export happens. By default, this button is off here, because the original file name will always be "Order_" (or its translation in another language) and the ID of the current order. So, no overwrite will occur. It is **recommended** to turn on this button on SCHEDULE section. We will talk about this button on that section.

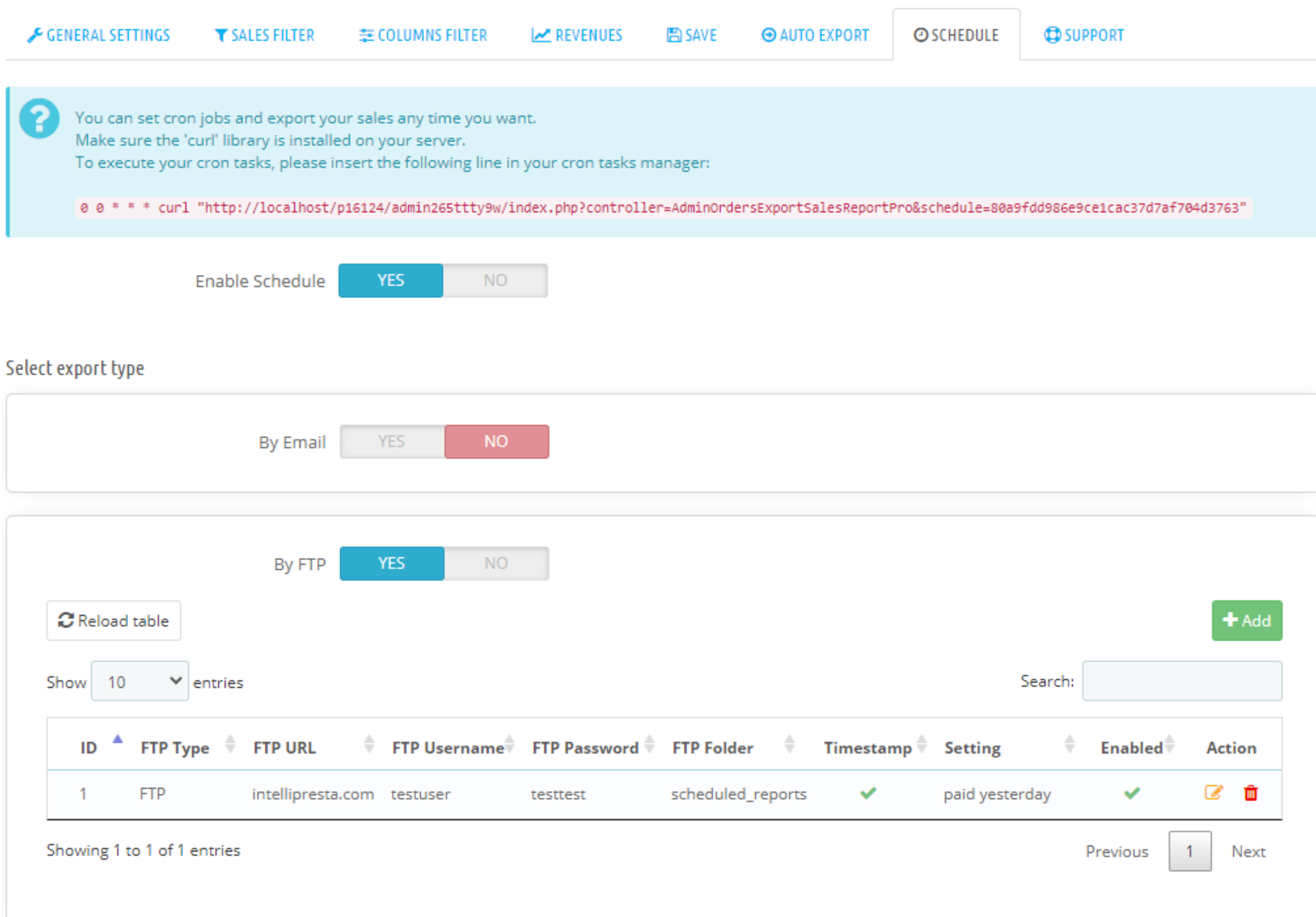
**Setting**. We talked about this above.

If you want to export the file in the other format or with other columns, you should create an appropriate setting and select it here.

# Schedule 8

## SCHEDULE

This section is similar with AUTO EXPORT section. But there are some differences. This section helps you to send the export file of your sales to email(s) and/or FTP address(es) **regularly**.




Unlike in AUTO EXPORT you do not export only the new order, but any orders (sales) based on the setting you select. And file name will be what you entered for it. To run the export task, you should place the URL given above in red color into your CRON task manager. CRON is a Unix/Linux tool which runs the tasks at specified times. `0 0 * * *` means that the URL will be run every day at 00:00 am. So, you will get export file everyday midnight. For more information you can refer to the Internet.

The only thing we should talk about here is **Add Timestamp** button. Because the file name it taken from the “File name” input on GENERAL SETTINGS section. So, the file name will be same as “Sales.xlsx” and it is highly **recommended** to keep this button on so that the file name can be like “Sales_2020-12-25 145623.xlsx”. Otherwise, due to the overwrite you will only have the latest export file and the previous versions will be lost.

# Support 9

## SUPPORT

The last section contains the link to this PDF documentation and the link to us for support.