

# How to generate reports using the Local Food Coop website

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## 1 How to view the Wholesale Report

There are two ways to view the Wholesale Report.

If you are an Administrator:

1. Go to the **admin login** <http://localhost/foodcoop/shop/admin> and enter your usual login details – email address and password.
2. Click on “**Wholesale Report/Producer Invoice**” - under “After ordering closes” (top left).
3. Click on “**Wholesale Report**” or “**Wholesale Report by Collection Location**” for the relevant producer or supplier. The Wholesale Report gives product totals across all collection locations. The Wholesale Report by Collection Location shows the product totals for each collection location separately.

If you are a Producer or Supplier:

1. Go to the **normal login** <http://localhost/foodcoop/shop> and enter your usual login details – email address and password.
2. Click on “**Wholesale Report**” – in the middle of the page under “Producer Invoices”. This will give the product totals across all hubs.
3. Click on “**Wholesale Report by Collection Location**” (top left) to show the product totals for each hub separately.

The tables should print ok if needed.

## 2 How to view or edit the Customer Invoices

Instructions:

1. Log on to **admin interface** - <http://localhost/foodcoop/shop/admin> - and enter your usual login details – email address and password.
2. Click on “**Finalise/Edit Customer Orders**” - under “After ordering closes” (top left).
3. Click “**View Temp. Inv.**” for the member you're interested in.

4. *N.B. You will need to “finalise” invoices after ordering closes – see below.*

### 3 How to view the Cashier Report

To view the Cashier Report, which can be printed and used by the cashier to record takings on collection days:

1. Wait until **after the order cycle closes** (e.g. 1pm, Wednesday).
2. Log on to **admin interface** - <http://localhost/foodcoop/shop/admin> - and enter your usual login details – email address and password.
3. Click on **"Finalise/Edit Customer Orders"** - under “After ordering closes” (top left).
4. “Finalise” the invoices by clicking on the correct member ID number ranges, currently this is just **“1001-1100”**. There is no need to do this if the invoices have already been finalised.
5. After finalising the invoices for the current cycle, click on the **“Admin Home”** link in the footer of the page.
6. From the Admin Homepage, click on **“Cashier Report”** - under “After ordering closes” (top left).
7. Click on the **collection location** for which you want a report, e.g. “Kingston Environment Centre”.
8. You will then see a table suitable for printing for the cashier on collection day. The **total number and value of orders** for the given collection location is displayed at the top of the report.

### 4 How to view the Product Reference List

Instructions for viewing the list of **all products** available in the current ordering cycle:

1. Go to the **admin login** <http://localhost/foodcoop/shop/admin> and enter your usual login details – email address and password.
2. Click on **“LFC Price List”** - under “After ordering closes” (top left).
3. A printable list of all products available this order cycle will be displayed. Prices should be given *per kilo*, rather than per half kilo, for easy entry into the scales.

### 5 How to view the Who Ordered What Report

Instructions to view which customers have brought which products at each location:

1. Go to the **admin login** <http://localhost/foodcoop/shop/admin> and enter your usual login details – email address and password.
2. Click on **“Who Ordered What”** - under “After ordering closes” (top left).
3. Click on the **collection location** for which you want a report, e.g. “Kingston Environment Centre”.
4. Print the report – this will be quite long at the moment, perhaps 10 pages for each collection location.

### 6 How to view the Box Contents Report

To view the box contents and print a report for “box packers” on collection day, simplest is:

1. Go to the **shop homepage** - <http://localhost/foodcoop/shop>
2. Click on **“Veg and fruit boxes”** (bottom left)

3. Click on “**This Week’s Contents: ...**” for each box
4. Print the resulting box contents page.
5. *Tip: the breakdown of veg and fruit box contents is also listed on customer invoices.*

## 7 How to view the current Membership List

You can see who's registered on the shopping website as below:

1. Go to the **admin login** <http://localhost/foodcoop/shop/admin> and enter your usual login details – email address and password.
2. Click on “**View Members/Producers**” - under “Membership Information” in the left-hand column.
3. You will then see a table of members in alphabetical order.
4. *Tip: click on the column headings to change the sort order.*

I would advise checking the membership list before sending the first email of an order cycle, to see whether there are any new people to add to the email list.

*Tip: a copy-and-paste-able email list can be acquired by clicking on “**Email Mailing Lists**” - under “Membership Information” in the left-hand column.*

## 8 How to view the Orders by Collection Location

The number of orders at each collection location can be found at the **top of the Cashier Report** (see above), or:

1. Log on to **admin interface** - <http://localhost/foodcoop/shop/admin> - and enter your usual login details – email address and password.
2. Scroll down to the “Collection Locations” section on the left.
3. Click on “**Orders by Collection Location**”.
4. *Tip: if you need to change the collection location for a customer’s order, click on “View Details”, locate the customer, and click “Change collection location” next to them. Customers currently cannot change their collection location themselves once they have opened a basket. They can only cancel the order and open a new basket.*