



# Enhanced Reporting Guide

A Guide to Using Enhanced Reporting in the ShopVisible Platform.

# ShopVisible Enhanced Reporting

---

## Overview

This guide provides a high level overview of the ShopVisible Enhanced Reporting tool. This guide walks you through the tool by showing the basics of navigation, use, and generating a report, so you will be knowledgeable enough to work with this tool.

## Goals of This Guide

After reading this guide, you will be able to:

- Describe the importance of the tool as it relates to creating customized reports
- Access Enhanced Reporting within the Site Manager
- Comfortably navigate through each tab of the tool and be familiar with the options accessible
- Understand the use of the relational database illustration
- Describe how data in a basic report is built and can be organized through visual grouping, subtotals and a summary.
- Identify the various chart options available to select to visually illustrate report data and label chart components.
- Identify how to access, edit or delete a report and specify header and footer details
- Schedule a report to auto run and setup a distribution list
- Identify the various methods to export a report
- Describe how to configure a dashboard view

## Topics Covered

The following topics will be covered in this guide.

- Accessing and Navigating within the Enhanced Reporting Tool
- Building a Report
- Saving and Accessing a Report
- Overview of Exporting Report Options
- Adding and Adjusting Data in an Existing Report
- Visually Grouping Data
- Working with Charts and Graphs
- Advanced Options for Charts and Graphs
- Adding a Chart Title
- Setting Auto Distribute Options
- Configuring the Enhanced Reporting Dashboard

# Introduction

---

While the ShopVisible platform offers many reports for you to access under the Analytics Tab, these are standardized reports. Constructed to provide you with data and results from the system, these reports while effective for their purposes don't provide you many options to pull or look at the data in different ways.

Through ShopVisible's Enhanced Reporting services, the reports are only limited to the information you want to analyze. This tool provides you with the access to generate reports based on the data you deem important and critical to your business needs and processes. Reports built through the Enhanced Reporting service can be as complex and as involved as you like... constructed to show you years of data or a day's worth and incorporating information from a vast selection of available data fields.

Enhanced Reporting is a tool that is relatively easy to learn and use for the depth and power of reporting that it can provide.

Not only does this tool provide you multiple ways to compare, sort, and analyze results, it's a tool that matches your needs and schedule, since you can access real-time data when you need it.

When you generate a report, you can customize it to match your business needs, without involving ShopVisible IT or database experts. This is something our standardized reports do not provide.

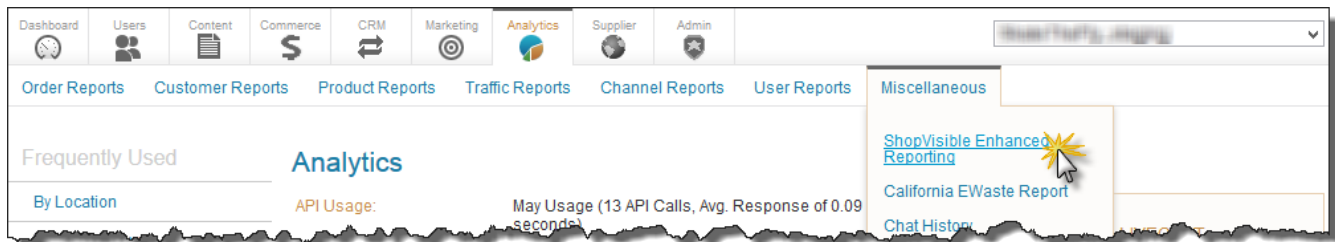
Information is key to running any business. Business owners and decision makers rely on reports to run their operations for an array of reasons — to make better decisions, to increase efficiencies, to service customers more effectively and to respond more quickly to threats and opportunities. Enhanced Reporting provides you unparalleled access to mission critical data in the form you need, when you need it.

For those that say knowledge is the answer, then this tool is the key that's needed to unlock that door.

# Accessing and Navigating within the Tool Area

## Accessing Enhanced Reporting

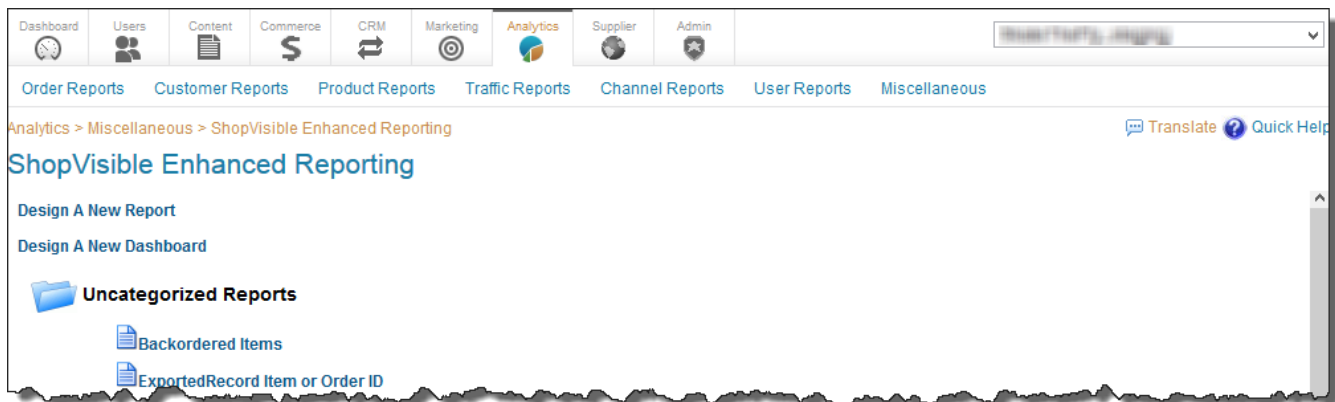
After accessing the Site Manager, navigate to the Enhanced Reporting tool. Follow this path: Analytics > Miscellaneous > **ShopVisible Enhanced Reporting** and the Enhanced Reporting tool will load.



## Understanding the Report List Window

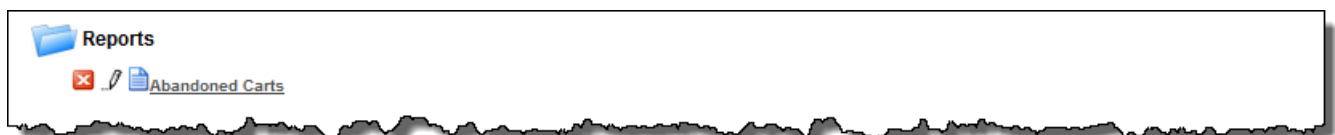
When the Enhanced Reporting tool loads, the **Report List** view will display. Click on a folder to show or hide its reports content. When reports are created, they can be grouped within folders and new folders also can be created to hold reports.

**Reports** are identified by a report icon and are located within folders. The report's name is a link that when clicked, will run the report and then display its results.



Mouse over an existing report's link and you'll see its edit and delete functionality. Click the red **"X"** box to delete a report. Click on the **pencil** to view and edit a report.

Click on the **report's name** and a loading graphic will appear while the report is querying the database. This can take several seconds depending upon the size of the data query.



The settings of this report will appear. From here you can add, edit, or remove fields. You can also choose to print or export the report by using the operators located at the top of the window. These will be discussed later in this guide. The reports that are created contain real time data.

The screenshot shows the 'Analytics | Miscellaneous | ShopVisible Enhanced Reporting' window. At the top, there is a toolbar with buttons for 'Back', 'Report List', 'Print', 'Export', 'Results' (set to 1000), and 'Design'. Below the toolbar, there are controls for 'Hide Filters', 'Add Field', 'Delete Field', and 'Update Results'. The main area is a table with four columns: 'Filter Field', 'Operator', 'Value(s)', and 'Blank'. The first row has 'create\_date' in the 'Filter Field' column, 'Less Than Days Old' in the 'Operator' column, '1' in the 'Value(s)' column, and a 'Blank' checkbox. The second row has 'OrderNumber' in the 'Filter Field' column, 'Blank' in the 'Operator' column, and a 'Blank' checkbox. The third row has empty fields for 'Filter Field', 'Operator', and 'Value(s)', and a 'Blank' checkbox. To the right of each 'Blank' checkbox are three small icons: a red 'X', a green checkmark, and a double-headed arrow.

### Designing a Report

To open the controls to design a new report, click **Design a New Report**. Later in this guide, a high level overview of the options available will be covered.

The screenshot shows the 'Analytics | Miscellaneous | ShopVisible Enhanced Reporting' window. The 'Design a New Report' link is highlighted with a yellow starburst icon. Below it, there is a 'Design A New Dashboard' link. At the bottom, there are two icons: a folder icon labeled 'Reports' and a document icon labeled 'Abandoned Carts'.

### Designing a Dashboard View

To open the controls to setup and **Design a New Dashboard** for the Enhanced Reporting tool, this link is clicked.

The screenshot shows the 'Analytics | Miscellaneous | ShopVisible Enhanced Reporting' window. The 'Design A New Dashboard' link is highlighted with a yellow starburst icon. Below it, there is a 'Reports' link. At the bottom, there are two icons: a folder icon labeled 'Reports' and a document icon labeled 'Abandoned Carts'.

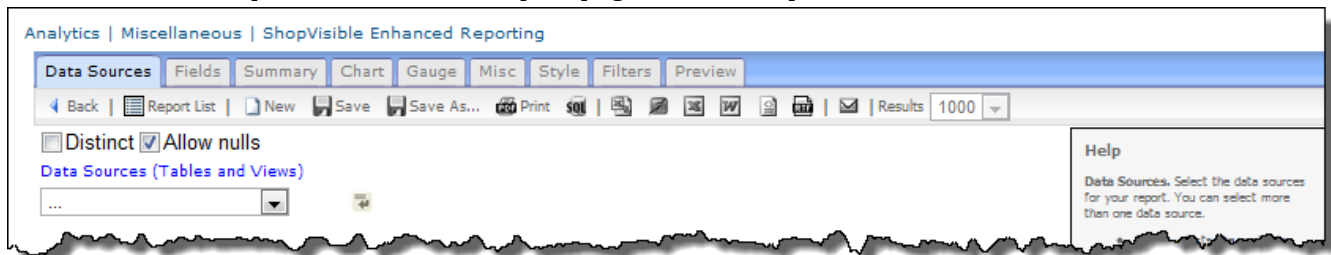
The dashboard provides you the ability to specify which report's graphs and charts will display upon accessing this tool. More on this aspect of the tool is provided later in this guide.

The screenshot shows the 'Analytics | Miscellaneous | ShopVisible Enhanced Reporting' window. The 'Report List' button is selected. The main area contains a form with the following fields: 'Title' (text input), 'Report' (dropdown menu), 'Records' (dropdown menu with 'All (No Scroll Bar)' selected), and 'Report Part' (dropdown menu). At the bottom, there are buttons for 'New', 'Save', 'Save As...', 'Print', and 'Preview'.

## Navigating Within the “Design a New Report” Area

Designing a new report can be relatively straight forward. Open the Designing a New Report link to open the New Report Area and review the following navigational options. While not all options are enabled when this page loads, the following general navigation options are available:

- **Back** – This option returns the user to the main ShopVisible enhanced reporting page.
- **Report List** – This option returns the user to the main ShopVisible enhanced reporting page.
- **New** – This option loads a blank report page so a new report can be created.



The other options on this tab and even other tabs are disabled until a report is created.

# Building a Report

## Distinguishing Between Report Options

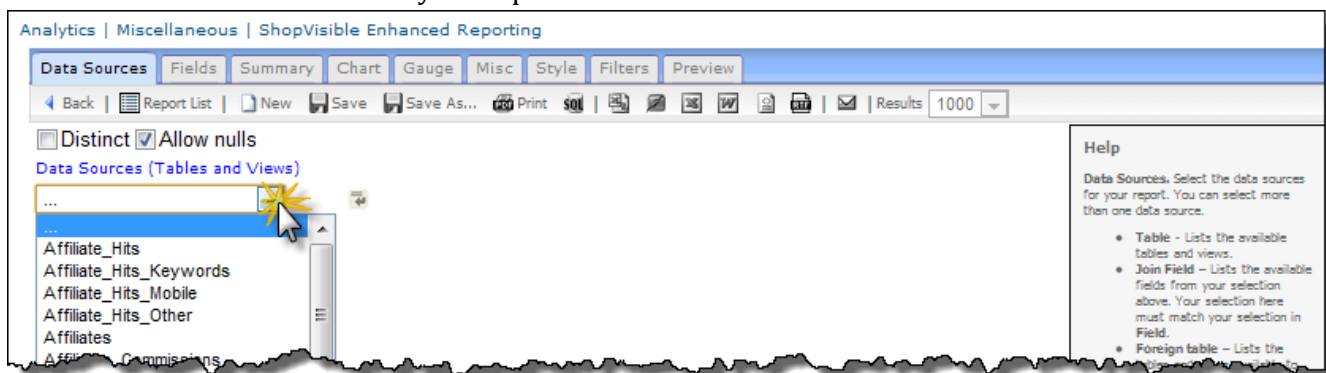
There is a difference between the distinct and the allow nulls options.

- **Distinct** – This option means there won't be any duplicates returned when the report is created.
- **Allow Nulls** – This option means that you will allow data to be returned when some of the data points do not have values and are blank.

## Selecting Data Sources

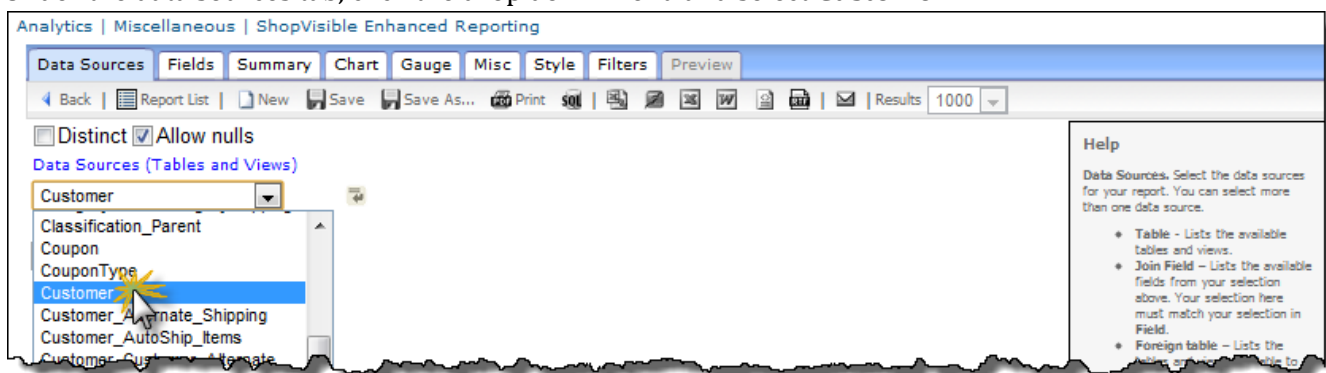
Click the drop down box to view all accessible **Data Sources** that you have to choose from. You can select more than one data source if you need to work with data from more than one data table.

In this lesson you will build a report to see the ease of which the Enhanced Reporting tool can be used. This initial report will form the core and you can add additional data sources and fields as the scope of the information that needs to be analyzed expands.



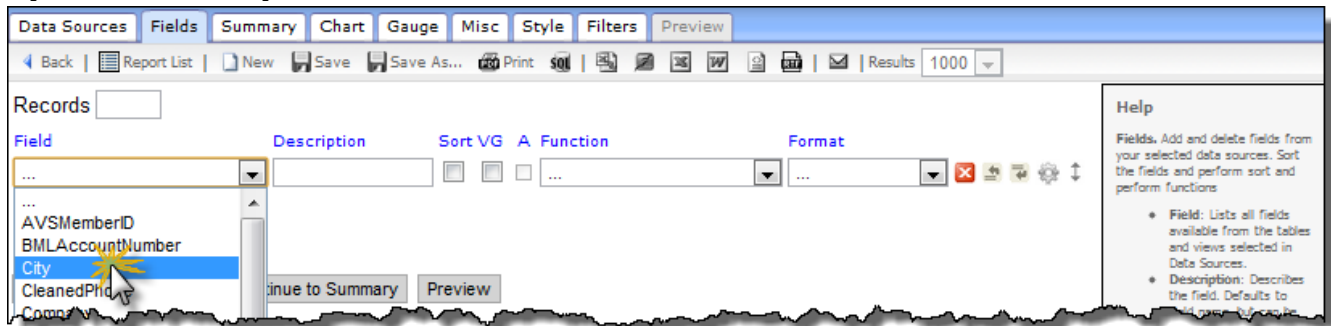
Let's generate a report that displays customer data that's been collected in the system. This will be for those who have purchased items and have an order history, as well as those who have registered on the site by providing these details and clicking on their contact information, but who may not have ever purchased anything.

Under the data sources tab, click the drop down menu and select **Customer**.

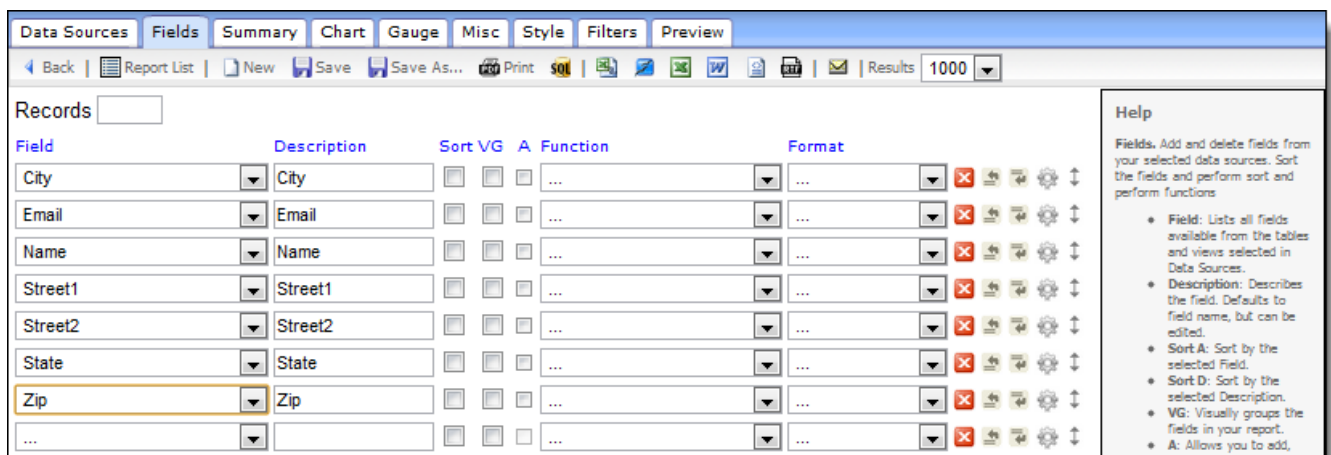


## Fields

Next we'll identify the use of the **Fields** drop down menu based on the data tables specified on the Data Source tab. The fields of the data tables, from those specified on the first tab, can be selected to direct the report to access and pull in record details.



To continue building the example report, under the **Fields** drop down menu, click and add the following fields: City, Email, Name, Street 1, Street 2, State, and Zip. The **Descriptions** entry defaults to the same entry that's listed in the Field column. However, the information in these columns can be edited. For example, you can rename your columns with the same titles you may be already using elsewhere.



## Previewing the Report

Click the **Preview** button to view the report given the data source and fields selected.





When the report loads, click on a **column header** to sort the data by that column. The report will show a list of customers with their contact information; however, the list will contain customers who have purchases on record and those guests to your site who have registered, but have not as yet purchased any items.

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview						
<a href="#">Back</a>   <a href="#">Report List</a>   <a href="#">New</a>   <a href="#">Save</a>   <a href="#">Save As...</a>   <a href="#">Print</a>   <a href="#">SQL</a>   <a href="#">Excel</a>   <a href="#">Word</a>   <a href="#">PDF</a>   <a href="#">Email</a>   Results: 1000						
City	Email	Name	Street1	Phone2	State	Zip
Lawrenceville	kevins@shopvisible.com	Kevin Sharpton	1000 N. Main St.		GA	30046
Atlanta	cheryl@shopvisible.com	Cheryl Fridley	100 East Peach Ferry Road, NE		GA	30326
Atlanta	training@shopvisible.com	Joe Jones	100 East Peach Ferry Road, NE		GA	30326
Atlanta	cheryllynn957@yahoo.com	Susie Queue	100 East Peach Ferry Road, NE		GA	30326

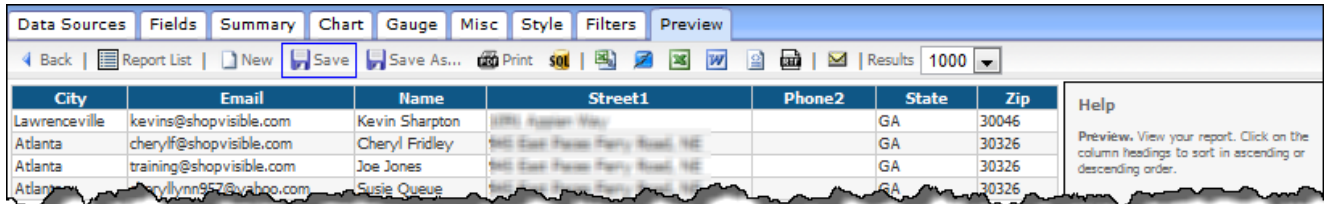
**Help**  
 Preview. View your report. Click on the column headings to sort in ascending or descending order.

How do you know who has made purchases? We'll answer that question coming up when we add more fields to expand the scope of the report.

For now, let's save the report.

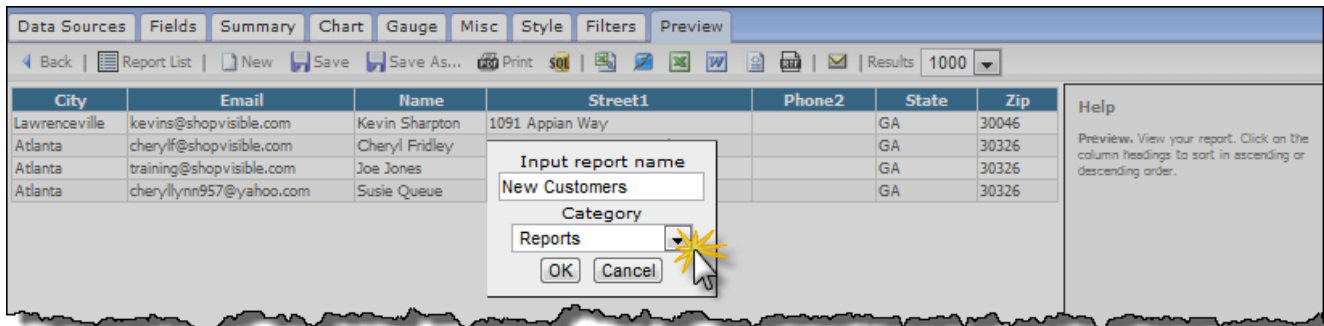
# Saving and Accessing a Report

To save the report the first time, click **Save As** and then enter a title for the report. This will become the title displayed as the report's link in the Report's List. As with all reports, you should establish a pattern of saving the report regularly to ensure all details are preserved. Simply click Save from time to time to accomplish this.

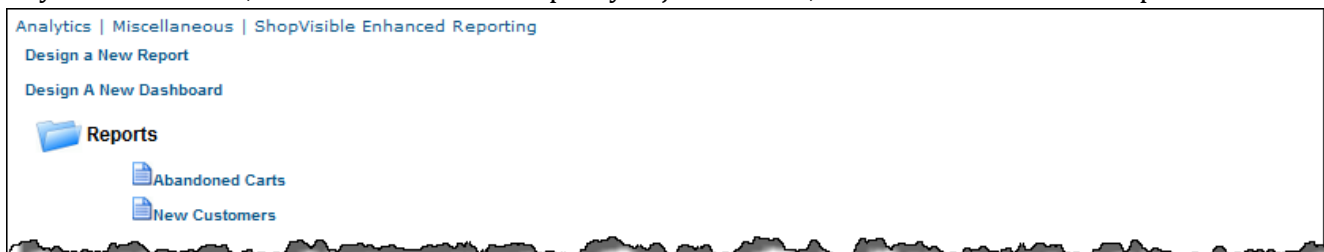


City	Email	Name	Street1	Phone2	State	Zip
Lawrenceville	kevins@shopvisible.com	Kevin Sharpton	1091 Appian Way		GA	30046
Atlanta	cherylfr@shopvisible.com	Cheryl Fridley	1411 East Paces Ferry Road, NE		GA	30326
Atlanta	training@shopvisible.com	Joe Jones	1411 East Paces Ferry Road, NE		GA	30326
Atlanta	cheryllynn957@yahoo.com	Susie Queue	1411 East Paces Ferry Road, NE		GA	30326

When the small window appears, select the **Category** folder where the report will be saved, or create a new one. Click the **OK** button and you now have created and saved a basic Enhanced Report. Check your work by clicking the **Report List** button to return to the Report List window.



As you can see here, the **New Customers** report you just created, is now available in the Reports file.



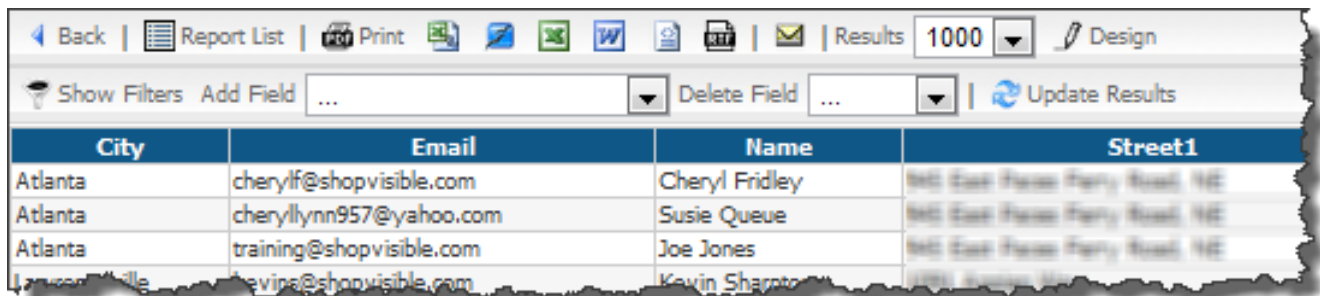
# Exporting Report Options

## Exporting and Editing a Report

Once a report is created, there are many options for exporting the report to work within other programs. You may want to do this to view the report or for further analysis outside the Enhanced Reporting tool.

- **CSV File** – Exports the report as a comma separated file that then can be loaded as a spreadsheet.
- **Open Office** – Exports the data as a file that is compatible with Open Office.
- **Excel** - Exports the data as an Excel spreadsheet file.
- **Word** - Exports the data as a Word file.
- **XML** - Exports the data as an XML file.
- **RTF** - Exports the data as an RTF file.

You can also export the report to **Print** which will create a .pdf file. The **Design** button will return you to the design interface.

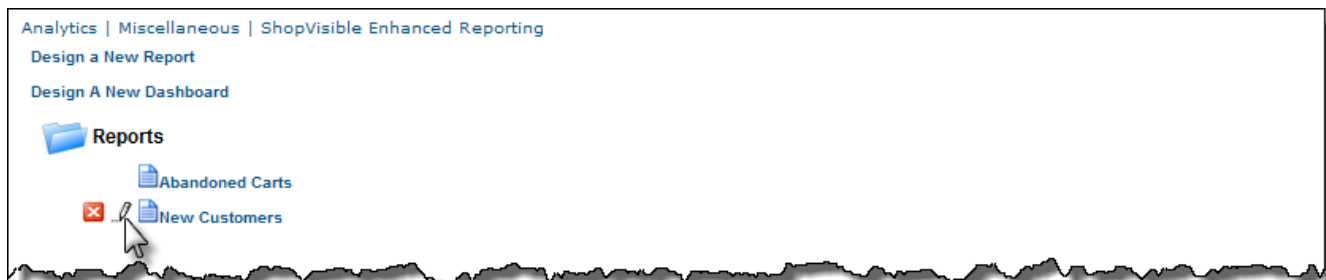


City	Email	Name	Street1
Atlanta	cheryl@shopvisible.com	Cheryl Fridley	1415 East Paces Ferry Road, NE
Atlanta	cherylynn957@yahoo.com	Susie Queue	1415 East Paces Ferry Road, NE
Atlanta	training@shopvisible.com	Joe Jones	1415 East Paces Ferry Road, NE
Lawrenceville	kevina@shopvisible.com	Kevin Sharpton	1415 East Paces Ferry Road, NE

# Editing Data in Existing Reports

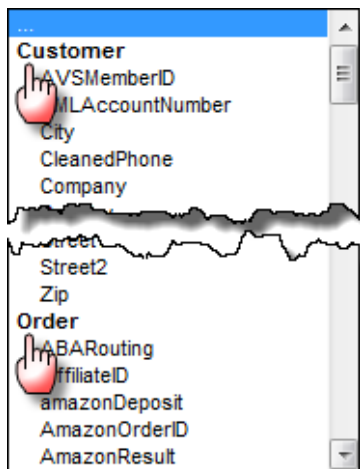
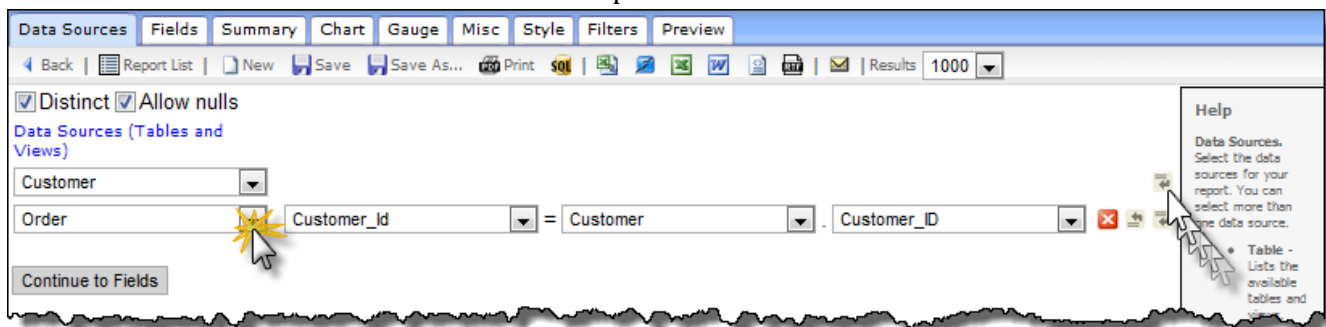
## Adding More Data and Information to the Report

Since we have a report that shows customer information, let's see which entries correspond to actual customers who have made purchases by associating an order number in the system to customer data. To edit the report that was just created, click the pencil icon next to its name.



Once the editable fields open, click the **Data Sources** tab and you can now add other data sources. Click the add **Data Sources** button and then with the next drop down arrow, choose **Order**. After you do this, the fields should automatically populate. For this example, verify the summary and data table that was added associates the following keys correctly: **ORDER, CUSTOMER\_ID = CUSTOMER, CUSTOMER\_ID**.

Once the additional data table has been made accessible to the report, click the Fields tab to locate and select fields from the data source to add to the report.



Identify that the Field drop down menu now includes a list of fields that are accessible from the **Customer** table and the **Order** table.

If you continue to build this report, the information in this data table will appear once you have set it in the Data Sources tab. For example if you set Product as a Data Source, once you return to the Fields tab, you will see all of the record options for Product available from the drop down field.

You can continue to build an extremely detailed report by selecting as many Data Sources as needed for a robust report.

Select the Order Number field from the Order section of the list.

Click the preview button to view the updated report, which will now contain order numbers that are associated to customers. For customer data where there have been no orders, the column will have a blank cell.

City	Email	Name	Street1	Street2	State	Zip	Order Number
Atlanta	cheryl@shopvisible.com	Cheryl Fridley	960 East Peach Ferry Road, NE	Suite 1475	GA	30326	
Atlanta	cheryllynn957@yahoo.com	Susie Queue	960 East Peach Ferry Road, NE	Suite 1475	GA	30326	
Atlanta	training@shopvisible.com	Joe Jones	960 East Peach Ferry Road, NE	Suite 1475	GA	30326	
Lawrenceville	kevins@shopvisible.com	Kevin Sharpton	1190 Aspen Way		GA	30046	10001.000

## Modifying the Report to Display Order Data

Since our order numbers do not have decimal points, the formatting of the Order Number column can be cleaned up to only show the number with no decimal places and since there are some blank cells, this indicates customer data that is not associated with an order so it can be removed from the list as well. To reformat the **Order Number** column, click the Fields tab and change the formatting to display as the numbers are pulled from the database.

To remove the blank cells, where there is not any order data associated with a customer entry, and since the customer has not made a purchase, click the **Filters** tab, scroll down to the Order area in the Filter Field, and select **Order Number**. Make the following entry in the Operator field, **Isn't Blank**.

Numerous options are available under the Operator menu field. All of these options will help you to fully customize your report.

Go back to the Fields tab. To pull in the amount of these orders, add the **Order Amount** field. This field automatically changes its format to currency (\$0.00).

In our example, let's add some more order information, which is helpful when analyzing data. Let's add the date of these orders in the report. To do this, add the following field, **Order Date**. Click to **Preview** the report.

Field	Description	Sort	VG	A	Function	Format
City	City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Email	Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Name	Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Street1	Street1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Street2	Street2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
State	State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Zip	Zip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
OrderNumber	Order Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0.000
Order_Amount	Order Amount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	\$0.00
Order_Date	Order Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	Short Date
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

**Help**  
Fields. Add and delete fields from your selected data sources. Sort the fields and perform sort and perform functions

- Field: Lists all fields available from the tables and views selected in Data Sources.
- Description: Describes the field. Defaults to field name, but can be edited.
- Sort A: Sort by the selected Field.
- Sort D: Sort by the selected Description.
- VG: Visually groups the fields in your report.
- A: Allows you to add, subtract, multiply, or divide by the selection in the row above. Click the box to.
- Function: Allows you to perform a function on the selected Field.
- Format: Allows you to format the selected Field.

You can add a summary line to all numeric fields using:

- Avg - the average of the fields
- Count - count the number of records

When the report opens, you will see the additional information of **Order Number**, **Order Amount**, and **Order Date** which will display with the customer information. Click the **Save** button to save the report.

City	Email	Name	Street1	Street2	State	Zip	Order Number	Order Amount	Order Date
Lawrenceville	kevin@shopvisible.com	Kevin Sharpton	1000 N. Main St.		GA	30046	10,001	\$7.99	9/9/2011

**Help**  
Summary. View a summary of the Fields tab information.  
Field | Value, Shows field and value for every pair.

## Adding a Summary to a Report

Add a summary to help provide an at-a-glance feature to the report. Click the Summary tab and complete the following items. Add a Title to the summary area of the report. Select the field of data that will be summarized. In this example make the following entry: Field = Order Amount, Sort Function = Sum, Format = \$0.00. Click to **Preview** the report.

Title Customer Orders

Field	Description	Sort Function	Format
Order_Amount	Sum(Order Amount)	Sum	\$0.00
...		...	...

Quick Add Add Pivot Continue to Summary Preview

**Help**  
Summary. View a summary of the Fields tab information.  
Field | Value, Shows field and value for every pair.

Along with the previous information that is still visible, you will see the **Sum (Order Amount)** for all customer orders.

Analytics | Miscellaneous | Shop/Visible Enhanced Reporting

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Back Report List New Save Save As... Print SQL Excel Word PDF Mail Results 1000

### Customer Orders

Sum(Order Amount)							
\$272.91							

City	Email	Name	Street1	Street2	State	Zip	Order Number
Herreid	training@shopvisible.com	Deanne Brown	354 Oak Street		SD	57632	10002.000
Herreid	training@shopvisible.com	Deanne Brown	354 Oak Street		SD	57632	10003.000
Herreid	training@shopvisible.com	Deanne Brown	354 Oak Street		SD	57632	10006.000
Lawrenceville	kevins@shopvisible.com	Kevin Sharpton	1091 Appian Way		GA	30046	10001.000
Mount Vernon	cheryl.fridley@att.net	Hank James	123 Main Street		KY	40456	10005.000
Richland	cheryl@shopvisible.com	Herman Plummer	4657 Eagle Drive		SC	29675	10004.000
Land	cheryl@shopvisible.com	Herman Plummer	4657 Eagle Drive		SC	29675	10004.000

## Adjusting Filers

Since the report includes data from all orders, let's narrow this information, such as a header and footer to display customer orders from only this year. We will use filters for this. Click the Filters tab and add the following two filters. In the Filter Field choose Order Date, set the Operator to In Time Period, and the Value at Current Year. In the next field choose Order Amount, the Operator Is Greater Than, and the value should be set to \$0.

As you can see, these Field and Operator selections automatically added the Values fields, where the Order Number selection did not. The **Param** option can be left checked to allow for further control of this data aspects from the report view. Click the Save button to save the report. Click Report List to return to it.

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Back Report List New Save Save As... Print SQL Excel Word PDF Mail Results 1000

Filter Field	Operator	Value(s)	Blank	Param
OrderNumber	Isn't Blank		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Order_Date	In Time Period	Current Year	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Order_Amount	Is Greater Than	\$0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
...	...		<input type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Show Filters In Report Description

Require  Parameters in Viewer

Preview

Help

Filters. Filter available fields.

- Filter Field: - Lists the available fields.
- Operator: - Lists the operations available for the above field.
- Value(s): - Allows you to input conditions for the operation.
- Blank: - Check the box to return results with the value or a blank (null).
- Param: - Check the box to allow users to modify the parameter from the report viewer.



# Visually Grouping Data

Next, let's group individual customer purchases together so there is a total for each and visually separate one customer from the next.

Visually Grouping allows the report to separate information between unique data points. We can visually group the report per customer by checking the check box to **VG**, which stands for visually group. When this is done, the checkbox next to VG, **Sort** also checks itself by default. Leave this checked and preview the report.

Field	Description	Sort	VG	A	Function	Format
City	City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
Email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
Street1	Street1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
Street2	Street2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
State	State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
Zip	Zip	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
OrderNumber	Order Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	0,000
Order_Amount	Order Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	\$0.00
Order_Date	Order Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	Short Date
...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

**Help**  
Fields: Add and delete fields from your selected data sources. Sort the fields and perform sort and perform functions.

- Field: Lists all fields available from the tables and views selected in Data Sources.
- Description: Describes the field. Defaults to field name, but can be edited.
- Sort A: Sort by the selected Field.
- Sort D: Sort by the selected Description.
- VG: Visually groups the fields in your report.
- A: Allows you to add, subtract, multiply, or divide by the selection in the row above. Click the box to.
- Function: Allows you to perform a function on the selected Field.
- Format: Allows you to

We now have a report that is separated and sorted by customer name (first name) and includes each customers' total purchases summed.



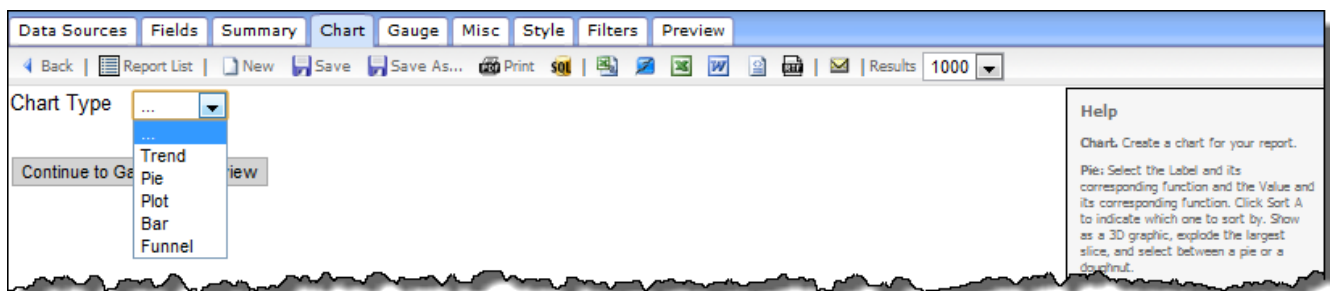
# Working with Charts & Graphs

## Chart and Graph Options

We've established that we can specify data tables and select fields from within those tables to pull into a report. Furthermore, we've filtered aspects of a report and added titles. Next, let's add some visual representation of the data in the report by configuring a chart to display.

Click on the Chart tab. In the Chart Type drop down field, you will see there are five different types of charts and graphs available.

- **Trend** – Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.
- **Pie** – Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.
- **Plot** – Select the X and Y values and click Sort A to indicate which one to sort by.
- **Bar Chart** – Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.
- **Funnel Chart** – Displays a greater to less illustration in a funnel shape to illustrate at the top the data point that has the most and then continues downward.



## Viewing a Trend Chart

Let's work with a trend chart to see what trends exist with our data and make the following selections. Select the **Trend** Chart Type. Type in a **Title** for your chart. For this example for the **Date** choose "Order Date" and "Group (Month Name)" as the date **Function**. Choose "Order Amount" for the **Value** and "Sum" for the **Function**. This will position a chart above the data summary and customer entries. Click to **Preview** the report.

Analytics | Miscellaneous | ShopVisible Enhanced Reporting

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Back | Report List | New | Save | Save As... | Print | SQL | Excel | Word | PDF | Results: 1000

Chart Type: Trend

Title: Records:

Date: Order\_Date Function: Group(Month Name) Sort: ☒

Value: Order\_Amount Function: Sum Sort: ☐

Advanced Properties

Continue to Gauge Preview

**Help**

**Chart.** Create a chart for your report.

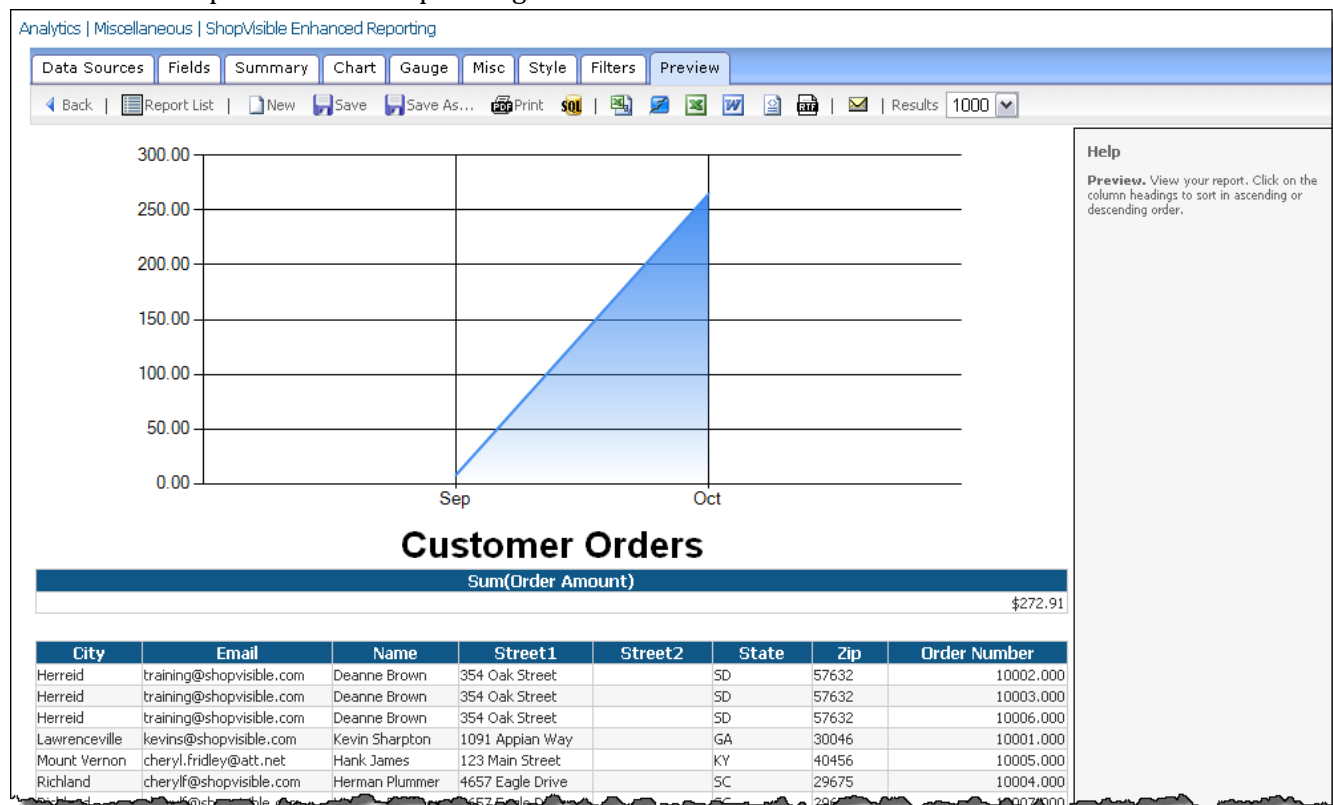
**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.

**Trends:** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

**Plot:** Select the X and Y values and click Sort A to indicate which one to sort by.

**Bar chart:** Select the Label and its corresponding function and the Value and its corresponding function.

Here is an example of how the report might look.



## Viewing a Funnel Chart

Click on the **Chart** tab and choose **Funnel** for the **Chart Type**. The options for this type of chart change to **Label** and **Value**.

Chart Type Funnel

Title  Records

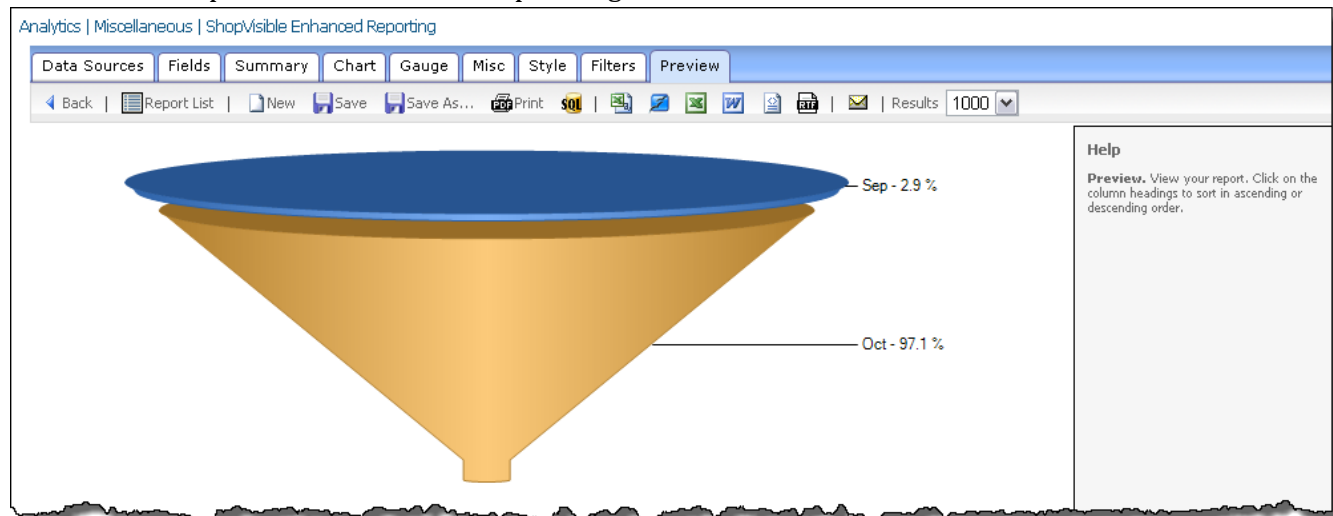
Label Order\_Date Function Group(Month Name) Sort ☐ Sort (z-a) ☐

Value Order\_Amount Function Sum

Show Percent ☒

**Help**  
**Chart.** Create a chart for your report.  
**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.  
**Trends:** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

Here is an example of what the funnel report might look like.



## Viewing a Bar Chart

Click the **Chart** tab and choose **Bar** for the **Chart Type**. The options for this type of chart change to **Label** and **Value**.

Chart Type Bar

Title  Records

Label Order\_Date Function Group Sort ☐ Sort (z-a) ☐

Value Order\_Amount Function Sum Sort ☐ Sort (z-a) ☒

Separator ... Function ...

**Help**  
**Chart.** Create a chart for your report.  
**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.  
**Trends:** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

As with other reports, click to **Preview** the report.

## Viewing a Pie Chart

As with the other reports, click on the Chart tab and select Pie for the Chart Type. Click to Preview the report.

Analytics | Miscellaneous | ShopVisible Enhanced Reporting

Data Sources Fields Summary **Chart** Gauge Misc Style Filters Preview

Back | Report List | New | Save | Save As... | Print | SQL | | | | | | | | | | Results 1000

Chart Type **Pie**

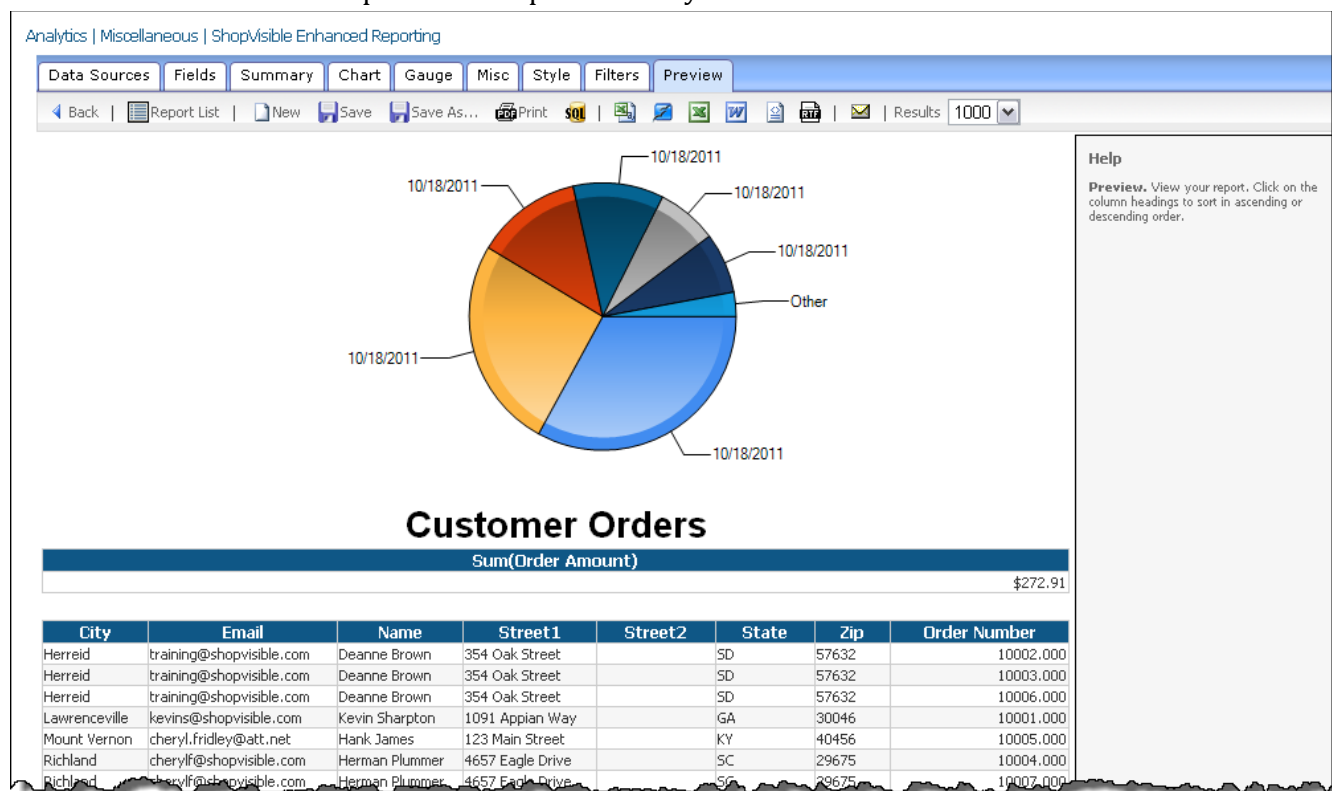
Title  Records

Label create\_date Function Group Sort ☐ Sort (z-a) ☐

Value AVSMemberID Function Count Sort ☐ Sort (z-a) ☒

**Help**  
**Chart.** Create a chart for your report.  
**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.  
**Trend:** Select the Date and its

Illustrated below is an example of what a pie chart may look like.



# Advanced Options

## Adding a Separator to a Bar Chart

To add a separator to a bar chart, click the **Chart** tab and then click on **Advanced Properties**. This will add more options to this screen.

Analytics | Miscellaneous | ShopVisible Enhanced Reporting

Data Sources | Fields | Summary | **Chart** | Gauge | Misc | Style | Filters | Preview

Back | Report List | New | Save | Save As... | Print | SQL | | | | | Results 1000

Chart Type Bar

Title Records

Label create\_date Function Group Sort ☐ Sort (z-a) ☐

Value AVSMemberID Function Count Sort ☐ Sort (z-a) ☒

Help

**Chart.** Create a chart for your report.

**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.

**Trends:** Select the Date and its

You will add the **Separator** “heard\_from” and the **Function** should be set to Group. Place a checkmark in the box next to Show Legend.

Analytics | Miscellaneous | ShopVisible Enhanced Reporting

Data Sources | Fields | Summary | **Chart** | Gauge | Misc | Style | Filters | Preview

Back | Report List | New | Save | Save As... | Print | SQL | | | | | Results 1000

Chart Type Bar

Title Records

Label create\_date Function Group Sort ☐ Sort (z-a) ☐

Value AVSMemberID Function Count Sort ☐ Sort (z-a) ☒

Separator heard\_from Function Group Sort ☐ Sort (z-a) ☒

Show Legend ☒

Show Pareto ☐

Shade Area Under Line ☐

Label Title (Bottom)

Value Title (Left)

Value Title (Right)

Target report

Help

**Chart.** Create a chart for your report.

**Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.

**Trends:** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

**Plot:** Select the X and Y values and click Sort A to indicate which one to sort by.

**Bar chart:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

# Titling the Chart

## Adding a Chart Title

To add a title to a chart, click the **Misc.** tab to add the following to the report. Type the **Title** of your report in the field. Type in the **Description**. You can also type in the **Header** and **Footer**.

The screenshot shows the 'Misc.' tab in the ShopVisible Enhanced Reporting interface. The interface includes a navigation bar with tabs: Data Sources, Fields, Summary, Chart, Gauge, Misc (selected), Style, Filters, and Preview. Below the navigation bar is a toolbar with icons for Back, Report List, New, Save, Save As..., Print, SQL, and various file formats. The main content area contains several input fields: Title, Description, Header, and Footer. Each field has a red hand icon pointing to it, indicating where to click. Below these fields are sections for 'Share With' (Everyone) and 'Rights' (None). There is also a 'Drill-Down Key' dropdown menu. The 'Schedule' section includes a time picker (12:00 AM), a date picker (1 November 2011), and a 'Repeat type' dropdown. The 'Send Email as' section has a 'Link' dropdown. A 'Recipients' text area is located below the schedule section. At the bottom, there are buttons for 'Continue to Style' and 'Preview'. A 'Help' sidebar on the right contains the text: 'Misc. Add a title, report description header and footer.'

# Setting Auto Distribute Options

## Specifying an Email Schedule

Complete the bottom section of the **Misc.** tab which includes the following options: **Share With** and **Rights**. You can also schedule for the report to run at set time intervals by choosing the **Repeat Type** from the drop down list.

You can choose to **Send Email as** one of several types of file formats. Separate **Recipients** emails by commas. When you're finished, click on **Preview** to view how the report will look.

The screenshot displays the 'Miscellaneous' tab in the 'ShopVisible Enhanced Reporting' interface. The top navigation bar includes tabs for Data Sources, Fields, Summary, Chart, Gauge, Misc (selected), Style, Filters, and Preview. Below the navigation bar is a toolbar with icons for Back, Report List, New, Save, Save As..., Print, and various file formats. The main content area is divided into several sections:

- Title:** New Customer Report
- Description:** This is the report that shows new customer's purchases.
- Header:** New Customer Report
- Footer:** Recent Purchases
- Share With:** Everyone
- Rights:** None
- Drill-Down Key:** ...
- Schedule:** 12 : 00 AM, 1, November, 2011
- Recipients:** cheryl@shopvisible.com
- Repeat type:** A dropdown menu is open, showing options: Every Day, Every Weekday, Every Week, Every Two Weeks, Every Month, Every Quarter, Alert Hourly, and Alert Daily.
- Send Email as:** A dropdown menu is open, showing options: Link, Embedded, PDF, CSV, HTML, XLS(MIME), and Word(RTF).

At the bottom of the form are two buttons: 'Continue to Style' and 'Preview'. A 'Help' sidebar on the right contains the text: 'Misc. Add a title, report description header and footer.'

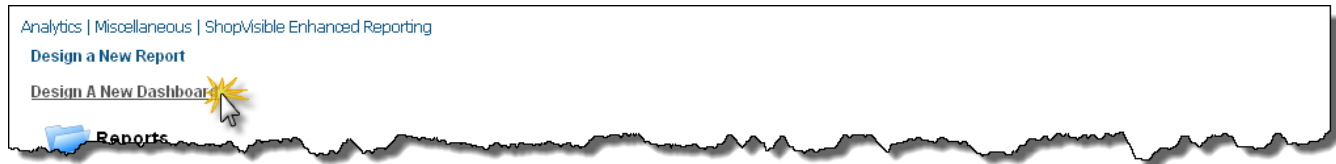
# Configuring the Dashboard

## Dashboard Overview

You may want to set up a Dashboard in order to see a quick at-a-glance view of some of your reports.

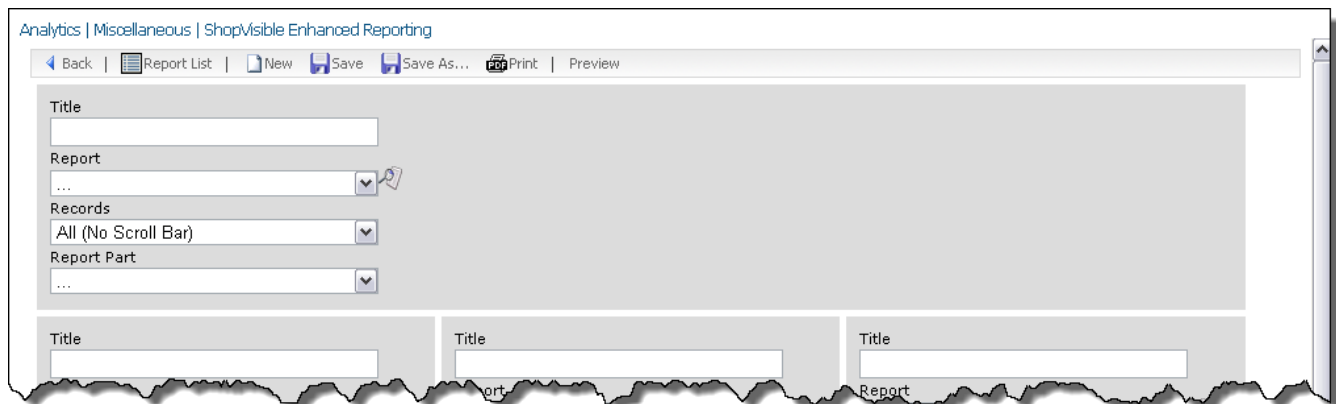
## Configuring the Dashboard

Click on **Design a New Dashboard** to access the Dashboard designer.



Here is an overview of the report fields available with the Dashboard designer. A total of 11 reports can be configured to display. Two reports are larger and nine reports are smaller.

- **Title**
- **Report** – Use the drop down to select the report that will be included on Dashboard. Any report can be selected that is in the REPORT LIST. The icon next to the REPORT DROP DOWN MENU is used to open the selected report in a separate window for viewing.
- **Records** – This option allows for the selection of the number of records to display for the report. Can be adjusted in increments of 5 and there are settings for All and All (No Scroll Bar).
- **Report Part** – This option allows the user to identify which element of a selected report will display on the dash board. If there is a report that has multiple charts or pivots that need to be displayed, then that report will need to be added multiple times to the dashboard. Afterward, each part of the report can be set separately to display on the dashboard as one entry may be set to display a pivot table where another report setup can be configured to display a chart or trend graph.





**ShopVisible™**