LiteCommerce Ecommerce Reports Module

Version 2.9

Reference Manual

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Introduction

The LiteCommerce **Ecommerce Reports** add-on module is an extremely flexible tool created to help you perform targeted searches of different kinds of store data and gather information about various aspects of your LiteCommerce online store functioning. The module allows you to get the data which is of vital importance to any e-commerce business: you can turn to any period in the history of your store and find out how many orders of different statuses existed at the time, what the number of active members accounts and the number of accounts registered during the period was, which of your products were sold the most, how the dynamics of sales changed during the period, where the customers who purchased products at your store came from, what payment/shipping methods were the most popular, which of your customers purchased products from this or that category, and much more.

Administrator Zone

This section contains information on:

- installing the LiteCommerce Ecommerce Reports add-on module;

- operating the module.

Installing the Module

To successfully install **Ecommerce Reports** add-on module your shopping system requires LiteCommerce shopping cart software version 2.x to be installed at your online store.

Select the 'Modules' section in the 'Settings' menu of the Administrator Zone. The list of currently installed modules will appear. To install a module (**Ecommerce Reports** in our case) click on the **'Browse…'** button, select the module's **'.tar'** file and click on the **'Install'** button to add the module to your store setup.

Locating the module archive

'Ecommerce Reports' module will appear in the list of the installed modules; it will be activated automatically.

The module has been installed

To deactivate the module, unselect the **'Active'** check box against the module title and click on the **'Update'**

button. To completely uninstall the module, click on the **'Uninstall'** button.

Operating the Module

The module does not need to be configured. To access the functionality provided by the module in the Administrator Zone go to the 'Ecommerce reports' section of the 'Maintenance' menu.

E-commerce reports section

There are six tabs here, with corresponding report groups:

- General statistics;

- Product sales;

- Sales dynamics;

- Sales by geography;

- Shipping/Payment stats;

- Focused audience.

You can switch between the sections by selecting the corresponding tabs at the top of the screen.

General Statistics

This section displays general shop statistics for the specified period.

Specify the period by setting the period start and end dates and click **'Show stats'**.

Specifying the report period

The statistic data which are shown are self-explanatory.

The following data are included:

- **the total number of orders placed at your store during the chosen period** (with specified data on the order statuses),

- **gross subtotal of all the orders in the period** (the sum of subtotal amounts of all the orders),

- **total tax** (the sum of all the taxes applied to the orders),

- **shipping charges** (the summarized cost of shipping of all the orders),

- **the total sum of discounts applied to the orders** (with detailing of the amounts falling to the parts of different kinds of discounts),

- **gross total sales amount** (the sum of total amounts of all the orders),

- **the number of active members accounts** (number of store user accounts which are currently enabled),

- **the number of new member's accounts** (accounts registered during the specified period).

Product Sales

The 'Product sales' section allows you to get information about the products sold by your store during a certain period. You can get statistics on products from one specific category, several categories or all the categories in your store.

To get statistical data on the products of some category/categories sold in some period, do the following:

1. Select report period.

2. Select the categories you want to include into the search results.

> ☀ If you have **ProductOptions** module enabled, you see the 'Split by product options' check box. Select this box if you want the variants of one product which have product options to be displayed in the list of results on separate lines.

3. Select 'Quantity' or 'Total' in the 'Sort by' select-box.

4. Click **'Search'**.

'Product sales' search filters

Example 1.

You want to find out, how many products from the category 'Clothing & Fashion/Clothes' were sold from April 1, 2006 till April 16, 2007. Take the following steps:

1. Specify the beginning and the end of the period: April 1, 2006 and April 16, 2007.

2. In the 'Categories' field select 'Clothing & Fashion/Clothes'.

3. Leave the 'Split by product options' check box empty (applies only if you have **ProductOptions** enabled).

4. To sort the search results by the quantity of sold products, select 'Quantity' in the 'Sort by' select box.

5. Click **'Search'**.

The results of this search query will look something like this:

```
2 product(s) found

Product name                        Qty   Average price    Total

Beatles "Vintage Logo" T-shirt       4        $ 16.88     $ 67.52

Champion 100 Cotton Gym Short        1         $ 8.56      $ 8.56

                           Total:    5        $ 15.22     $ 76.08
```

'Product sales' report

Sales Dynamics

This section displays statistics on sales for the specified period. You can get a graphic presentation of information about the summarized cost of products purchased during this period, the quantity of items purchased and the number of orders placed in this period with "*Processed*" or "*Complete*" status. You can get statistics on sales within a specific category, a group of categories or all the categories in the store, and even trace the dynamics of how a specific product was sold.

The application performs a search based on the parameters specified in the form and produces a graph which can be used for quick evaluation of the store sales dynamics. The necessary degree of accuracy of the graph can be set by selecting the step (day, week, month, quarter, year). The search results can also be exported to MS Excel where a more accurate graph can be built. Export to MS Excel gives you the advantage of being able to choose the form of the graphical presentation of your data.

To get the application to produce a graphical presentation of sales dynamics in the 'Sales dynamics' section, do the following:

1. Select the period.

2. Select the step you want to use to break down the results: day, month, week, quarter, year.

3. Select the categories you want to include into the search results.

'Sales dynamics' search filters

4. Click **'Select product'** and use the standard product search forum to choose the necessary one. When you have selected a product, you can click **'Clear'** to remove it from search parameters.

5. Select which data you want to see: the total for all the sold items of the product; the quantity or the number of orders.

6. Click **'Search'** to show the results or 'Export to MS Excel' to view or save an .xls file containing the sales dynamics.

Click **'Clear form'** to delete all the search parameters.

Example.

You want to trace the dynamics of the number of orders placed at your store in the period April 1, 2006 – April 16, 2007 which are now processed / completed. Take the following steps:

1. Specify the beginning of the period: April - 1 - 2006.

2. Specify the end of the period: April - 16 - 2007.

3. Select the step for your graph (For example, *Day*)

4. As you are interested in all the sales made at your store, click on the 'select all' link to select all the categories. Do not use the **'Select product'** button.

5. In the 'Show' line select the radio button next to 'Number of orders'.

6. Click **'Search'**.

The results displayed to you will look like this:
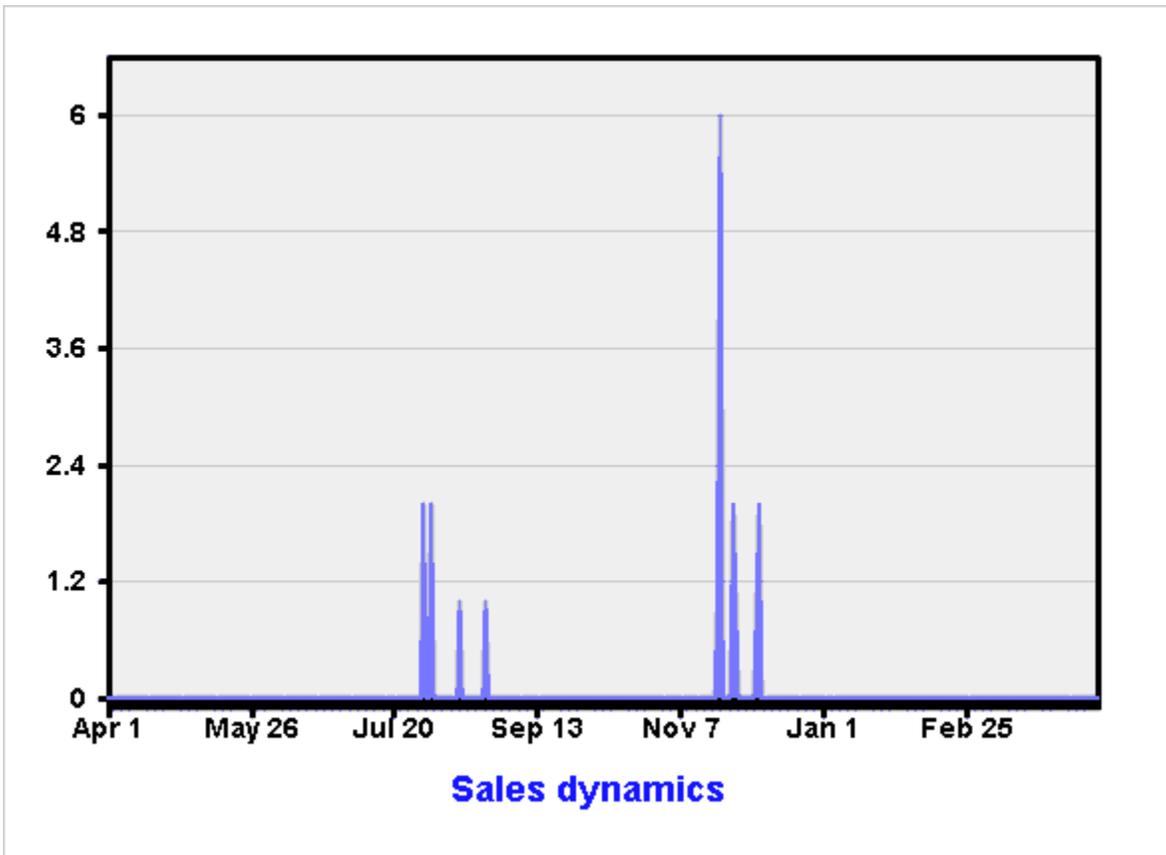
'Sales dynamics' report results

Exporting the search results data to MS Excel, you get a file with a list of dates and the indication of the number of orders placed each day:

Export to MS Excel

Sales By Geography

The 'Sales by geography' section allows you to get information about the geography of your sales. Namely, you can find out, what products from this or that category (or the whole store) were purchased by the customers coming from a certain location, how many items of each product were purchased and what the total sum of purchases was. According to your needs, information about your customers' location can be gathered from either billing or shipping address provided in the order.

To get information about the purchases made by the customers coming from a certain location, do the following:

1. Select the period.

2. Select the categories you want to include into the search results.

3. Select which address to use - shipping or billing.

'Sales by geography' search filters

4. Select countries and states to be included into the report.

The conditions set by the 'Country' and 'State' fields are applied consecutively. First, the application scans all the customer addresses of the type selected in the 'Use address' select box in the processed/completed orders pertaining to the period, picking only the addresses located in the countries selected in the 'Country' field. After that, it picks from the set of addresses collected at the previous stage only the ones located in the states selected in the 'State' field. The said above implies that, if you want to use states, you need to select just one country in the 'Country' field, and the state(s) selected in the 'State' field must be part of it (For example, you cannot find out the number of purchases from Russian Federation and California, USA together in one search. If you select both Russian Federation and United States in the field 'Country', and California in the field 'State', you will be shown just the purchases from California, USA, Although there might be some orders from Russian Federation, they will be ignored, as there is no state named 'California' in Russian Federation).

5. Select 'Quantity' or 'Total' to sort by.

6. Click **'Search'**.

Example.

You want to know how many purchases were made at your store in the period April 1, 2006 – April 16, 2007 by residents of USA (You want the search to be based on the billing address). Do the following:

1. Specify the beginning of the period: April 1, 2006.

2. Specify the end of the period: April 16, 2007.

3. As you are interested in all the sales made at your store, click on the 'check all' link to select all the categories.

4. Select United States in the field 'Country'.

5. Select the 'Split by product options' check box for product variants to be displayed on separate lines.

6. Select Total in the 'Sort by' select box for the search results to be sorted by the total amount.

7. Click on **'Search'**.

The results displayed to you will look something like this:

16 product(s) found

Location: **United States / All**

Product name	Qty	Average price	Total
Adobe Photoshop CS	1	$ 599.90	$ 599.90
Yamaha EG-112PR Electric Guitar Kit	2	$ 219.00	$ 438.00
14k Bold Pear Citrine Drop Earrings in Solid Gold	1	$ 149.00	$ 149.00
Breyer: Flim Flam	1	$ 79.87	$ 79.87
Heart Shaped Blue Topaz & Diamond 14K Gold Pendant on 18" Chain	1	$ 79.00	$ 79.00
Beatles "Vintage Logo" T-shirt	4	$ 16.88	$ 67.52
Full Size Violin 4 x 4 With Case - Natural Color	1	$ 49.87	$ 49.87
Amigo 3/4 Size Classical Guitar	1	$ 45.85	$ 45.85
Sterling Silver Peridot, Garnet, Amethyst, Blue Topaz & Citrine Stud Earring Boxed Set	1	$ 45.00	$ 45.00
Children's Sterling Silver Heart Locket on Cable Chain, 14"	2	$ 20.00	$ 40.00
Pan Flute, 15 pipes	1	$ 32.00	$ 32.00
Nike Air Trainer Lite	1	$ 30.00	$ 30.00
10-Piece Sampler	2	$ 10.00	$ 20.00
10 in. Tambourine Double-Jingles	2	$ 8.75	$ 17.50
C.B. Collections Melissa 2	1	$ 11.13	$ 11.13
Champion 100 Cotton Gym Short	1	$ 8.56	$ 8.56
Total:	**23**	**$ 1,404.81**	**$ 1,713.20**

'Sales by geography' report results

If you want to find out how many purchases were made in the same period by residents of just one American state, California, set the search parameters exactly as in the example above, but select California in the field ' State' (in addition to United States selected in the field 'Country').

Shipping/Payment Stats

The 'Shipping/Payment stats' section allows you to single out various types of orders based on the used shipping or payment method (or their combination) and to find out statistical data about these order types (for example, how many orders of each type were placed during some period, what the total amount of the orders of a specific type is, and how many percent of all the orders fall to the part of this or that type).

Only payment and shipping methods used in orders are present in search form.

To view statistics based on the shipping/payment methods used in the orders, do the following:

1. Select report period.

2. Specify the shipping method ('Shipping method' select box). Only the shipping methods actually used in the orders appear in the drop-down list. Select *All* if the shipping method is not important.

> The entry 'unknown (id:0)' stands for the shipping methods which cannot be recognized by the system currently (For example, a shipping method gets marked as 'unknown' if it was used in some order and then was removed from the list of methods used by the store. A record of the shipping method remains in the order, but its name is no longer in the list of available methods, so the method is unknown).

3. Specify the payment method ('By payment method' select box). Only the payment methods actually used in the orders appear in the drop-down list. Select *All* if the payment method is not important.

4. Click **'Search'**.

'Shipping/payment stats' search filters

Example

You want to find out how many orders placed in the period April 1, 2006 – April 16, 2007 used 'National shipping' shipping method and 'Phone ordering' payment method. Do the following:

1. Specify the beginning of the period: April - 1 - 2006.

2. Specify the end of the period: April - 16 - 2007.

3. In the 'Shipping method' select box, select *National shipping*.

4. In the 'By payment method' select box, select *Phone Ordering*.

5. Click **'Search'**.

The results displayed to you will look like this:

'Shipping/payment stats' report results

Eighteen orders with the combination 'National shipping + Phone ordering' were placed at the store during the specified period, the total amount of these orders is $1,381.08, and they make 75% of the total number of currently processed/completed orders which were placed during this period.

Focused Audience

The 'Focused audience' section allows you to find store users by certain marketing criteria, send newsletters to their e-mail addresses and export information about the found users to a CSV file. For example, you can find users who purchased certain products (you can specify up to 3 products per one search and for each of these products set additional conditions concerning the number of items purchased), users who purchased products from a specific category (or categories), users from a particular location, users who paid for their orders by a particular gift certificate, users who purchased products for a sum that is more than/less than/equal to a certain amount, etc.

You need to install the **Newsletters** add-on in order to send newsletters to the focused group.

To search for users:

1. Specify the beginning of the period ('Period from' line).

2. Specify the end of the period ('Period to' line).

3. Select either *all* or *any* from the select box in the 'Match: all/any of selected products and categories' line.

4. (Optional) Select 1-3 products which were bought by the users you are searching for ('Purchased products' section).

To select a product click on the **'Select product'** button and use the standard product search form to find the necessary one.

If more than one product is selected, the search results will include all the users who bought at least one of them.

5. (Optional) Specify the number of items of the selected product(s) in one order:

   a. Use the select box 'Select one…' opposite the name of the product to select *More than*, *Less than* or *Equal*.

   b. Enter the number of items into the input box next to it.

(All the users, who placed at least one order with the number of items of the selected product specified in this field, will be found. For example, to find all the users whose order contains 3 items of the product, select 'Equal' + '3'. To find all the users whose order contains more than 10 items of the product, select 'More than' + '10').

6. If necessary, select the categories in which purchases were made by the users you are searching for (' Purchased products from categories' section).

7. Target your search by location:

   a. Choose by which information you want to define the location of your customers ('Search by location' line): select *Billing information*, *Shipping information* or *Both*.

   b. Specify the city which the customers come from, select a state and a country.

8. Specify what the total of a customer's purchases must be:

   Select *More than*, *Less than* or *Equal* and enter the amount, with which the total of a customer's purchases must be compared, into the input box next to it.

9. Specify what the number of a customer's orders must be ('Number of orders' line):

   Select *More than*, *Less than* or *Equal* and enter the number, with which the number of a customer's orders must be compared, into the input box next to it.

   (For example, to find all the users who placed more than 10 orders which are now processed/completed, select 'More than' + '10'. To find all the users with the number of orders equal to 3, select 'Equal' + '3').

10. If necessary, enter the ID of the gift certificate which was used by the customers to pay for the products purchased at your store ('Used gift certificate' input box).

11. Select the membership level to which the customers being searched for belong ('Membership' select box).

12. Click **'Search'**.

The names of users found by the search query are displayed in the form of a list along with the user's email addresses.

If at least one user is found, 2 sections appear below the list of search results: 'Send newsletter' and 'Export users'.

Sending a newsletter

The 'Send newsletter' section can be used to send a message to all or some of the users in the search results list.

> ☀ You need to install the **Newsletters** add-on in order to send newsletters to the focused group.

1. Enter the subject of your message ('Subject' field)

2. Enter the text of your message ('Body' field)

Sending a newsletter to the focused group

3. Click **'Send'**.

> 📝 The message will be sent to all the users in the search results list whose names are selected. If you do not want some of the found users to get the message, unselect the check boxes next to their names. Clicking the topmost check box allows you to select/unselect all the users in the list with one click.

Exporting users

The 'Export users' section can be used to export information about the found users to a CSV file:

1. Select a delimiter which you want to be used in the CSV file (semicolon, comma, tab)

2. Specify what kind of data you want to be exported into the CSV file by selecting the check boxes next to the names of the corresponding export fields.

Exporting users to MS Excel

3. Click **'Export'**.

4. Save the file.

Customer Zone

The **Ecommerce Reports** add-on module does not affect the Customer Zone.

Terms and Definitions

Administrator: a 'super-user' of the online store system who is privileged to configure the entire store and manage products, customers and orders;

Administrator zone: an administrator back office where the store Admin can configure, control and monitor store operations, enable or configure various features of the store;

Customer: a registered store user;

Customer zone: an area at the online store where store customers can manage their profiles and review their orders;

User: anyone who visits the online store.