

CUSTOMER PERFORMANCE REPORT EXTENSION



User Guide

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Extension Description

The Customer Performance Report Extension is an advanced customer performance report which allows you to see the number of orders by customer / total cost / total profit / qty sold etc.

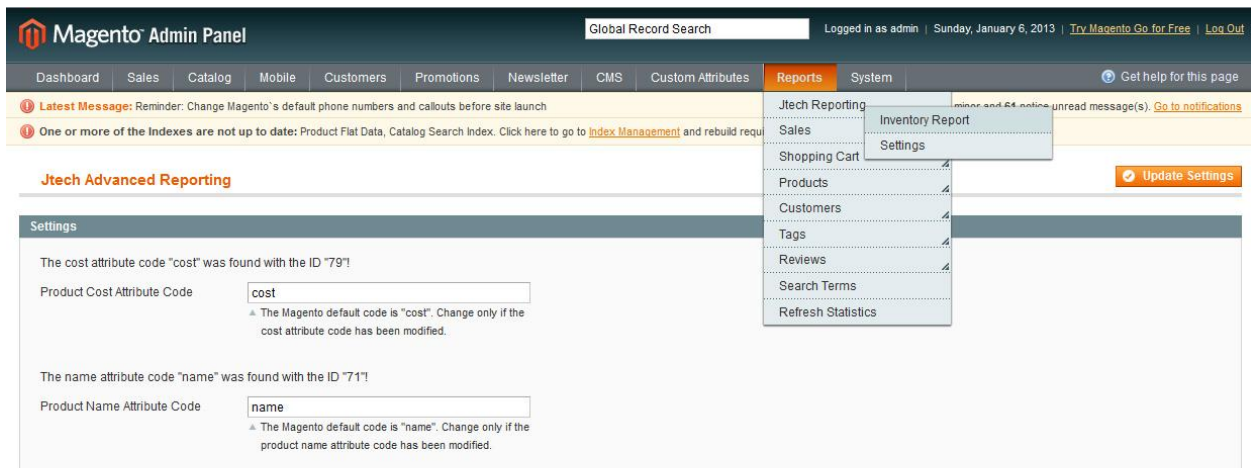
Extension Installation

1. Log out from Magento Admin panel if you are logged in
2. Unpack the contents of the 'extension' zip from the package file purchased from JtechExtensions to your Magento root folder
3. Log into Magento Admin Panel
4. If Cache Control is enabled in Magento go to 'System > Cache Management' section, select 'Refresh' under 'All Cache' drop-down menu and press 'Save Cache Settings'
5. Now go to 'System > Configuration > JtechExtensions tab > Extensions & Support' section. If you see 'File Downloads & Product Attachments' in the list of installed JtechExtensions extensions you are done.

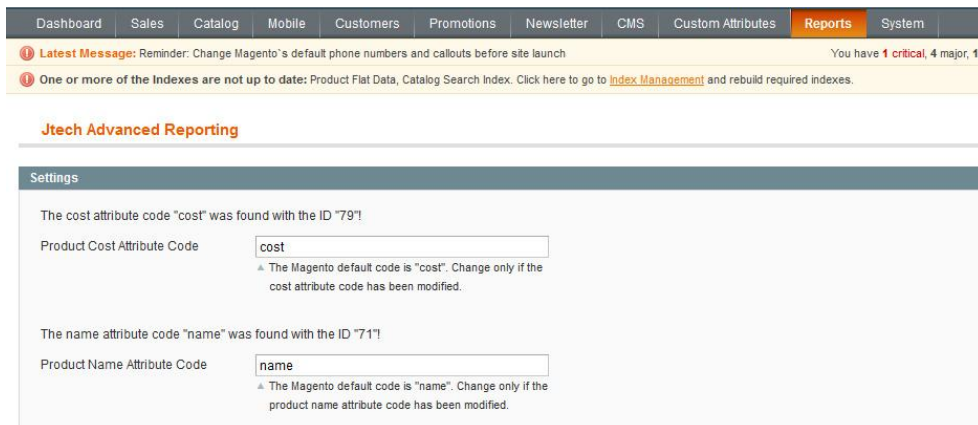
Extension Usage

Settings Tab

The settings tab within the “Reports -> Jtech Reporting -> Settings” area contains some important settings that in most cases require no changing from default. However, if you have made any changes or modifications to the product cost or name attributes then you may need to make the necessary adjustments here.

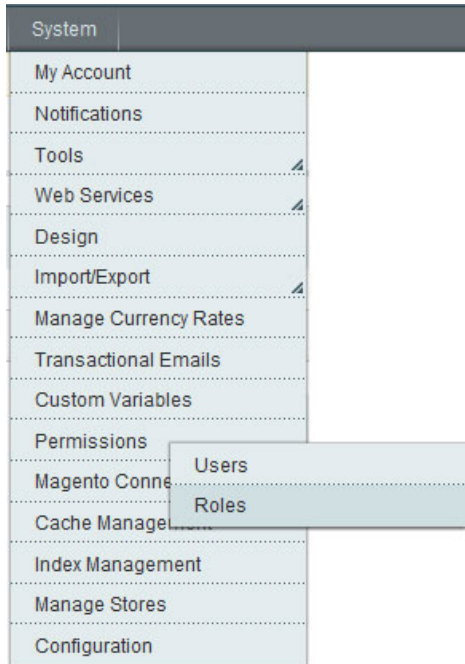


The module is designed to notify you if it has “found” or “not found” the cost and name attributes. By default, Magento sets “cost” and “name” as the attribute codes for the product cost and name attributes respectively.

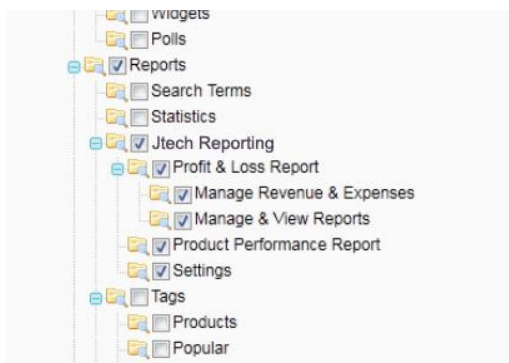


Settings Tab

Managing different user's access levels to the Jtech Inventory Report module is extremely easy. It's as simple as creating a new, or modifying existing user roles from within the "System_Permissions_Roles".



Simply check or uncheck the relevant boxes that appear next to "Jtech Reporting" under the "Reports" heading in the "Role Resources" menu.



Click on "Save Role" when you're done and then Associate the role to the desired users.

How to get to the Inventory Report

You can navigate to the module by following “Reports -> Jtech Reporting -> Customer Performance Report”

The Inventory Report Filter

The filter for the Customer Performance Report is exactly like the standard Magento “Manage Products” Section.

Show Report For:

Select the individual store from the drop down menu. Alternatively, you may select “All” to show the report for all websites and stores in your Magento install.

You can also export report results to CSV or excel file by clicking the export button below.

Customer Performance Report (Customer Profit Margin) Show Report

Show Report For: All Websites

Filter

Match Period To: Order Created Date

From *: 8/1/12

To *: 8/22/13

Order Status: Any
▲ Applies to Any of the Specified Order Statuses

Get Quantity From: All Orders
▲ Get the quantity ordered or the actual quantity invoiced

Use Product Cost From: Order Table
▲ The hybrid uses the products "cost" attribute when no value exists for "cost" in the order data tables

Export to: CSV Export

| Customer ID | Customer Name | Quantity Sold | Number of Orders | Total Cost | Total Price (excl. tax) | Total Revenue | Total Tax | Total Profit | Profit Margin |
|---------------|------------------|---------------|------------------|----------------|-------------------------|-------------------|---------------|-------------------|---------------|
| 2 | Scott Bolasevich | 60 | 54 | \$76.00 | \$1,603.46 | \$1,603.46 | \$0.00 | \$1,527.46 | 95.26% |
| | GUEST | 20 | 15 | \$19.00 | \$528.85 | \$528.85 | \$0.00 | \$509.85 | 96.41% |
| 5 | Mike Evans | 3 | 2 | \$0.00 | \$44.85 | \$44.85 | \$0.00 | \$44.85 | 100.00% |
| 7 | s s | 1 | 1 | \$0.00 | \$25.99 | \$25.99 | \$0.00 | \$25.99 | 100.00% |
| 6 | test test | 1 | 1 | \$0.00 | \$25.99 | \$25.99 | \$0.00 | \$25.99 | 100.00% |
| 11 | Scott Bolasevich | 1 | 1 | \$0.00 | \$25.99 | \$25.99 | \$0.00 | \$25.99 | 100.00% |
| 3 | Eric Merritt | 1 | 1 | \$0.00 | \$14.95 | \$14.95 | \$0.00 | \$14.95 | 100.00% |
| 4 | demo user | 1 | 1 | \$0.00 | \$6.95 | \$6.95 | \$0.00 | \$6.95 | 100.00% |
| Totals | | 88 | 76 | \$95.00 | \$2,277.03 | \$2,277.03 | \$0.00 | \$2,182.03 | |

Support

JtechExtensions offers 1 hour of support and 1yr of FREE updates for any Extension's developed for Magento.

If you need support related to JtechExtensions extension usage, feel free to contact me at jtechextensions@gmail.com