PRODUCT PERFORMANCE REPORT EXTENSION

User Guide

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Extension Description

The Product Performance Report gives you the power to instantly visualize just how profitable each individual product sold over a selectable period of time is. Find out which products are generating the most profit at the click of a button.

This extremely flexible module allows users to select where cost data is gathered from. You can either choose to have cost data used from the sales tables for versions of Magento greater the 1.4 or the cost element from the product attribute for Magento version prior to 1.4.
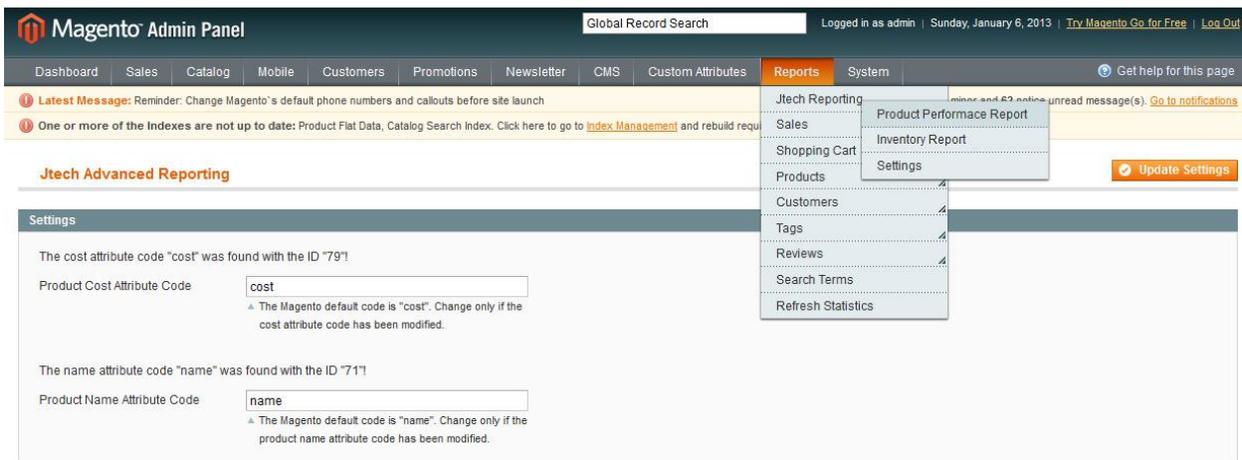
Extension Installation

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.
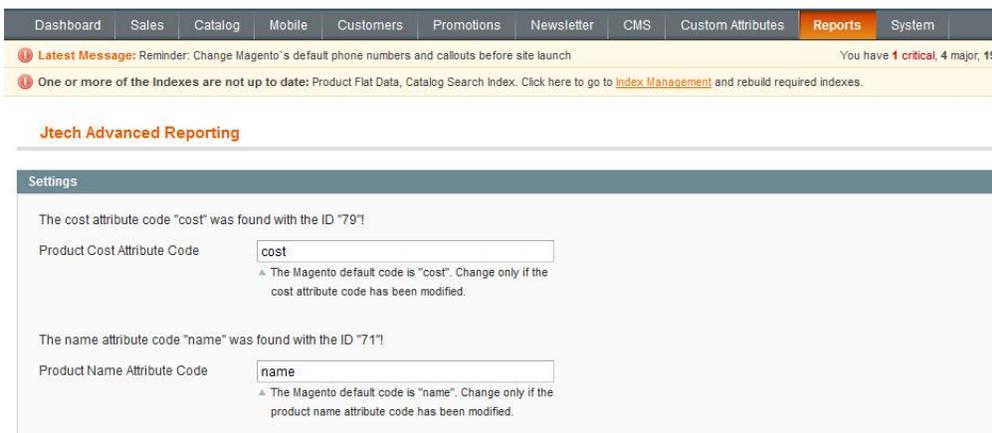
Extension Usage

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.
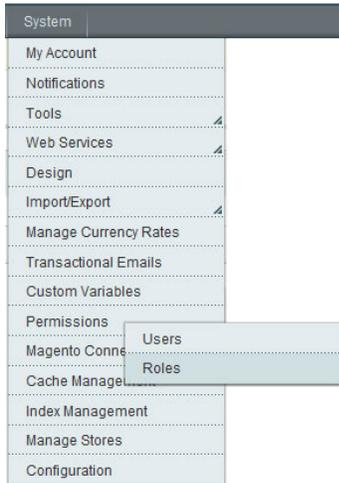

The module is designed to notify you if it has "found" or "not found" the cost and name attributes. By default, Magento sets "cost" and "name" as the attribute codes for the product cost and name attributes respectively.
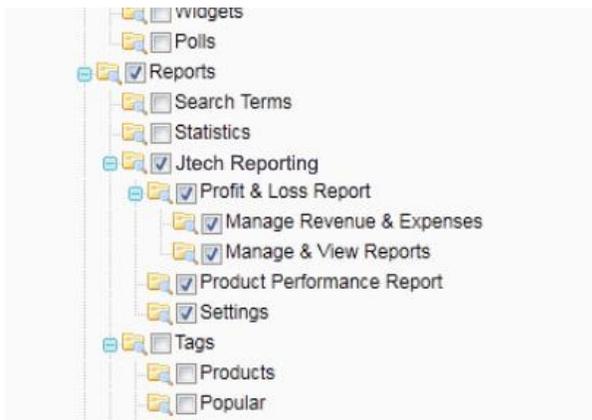
Setting Access Control Levels

Managing different user's access levels to the Jtech Product Performance 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 Product Performance Report

You can navigate to the module by following "Reports -> JTECH Reporting -> Product Performance Report".

The Product Performance Report Filter

The filter for the Product Performance Report is very similar to the standard Magento Sales Order's Report.

Show Report For:
Select the website, store group or 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.

Match Period To:
As with the typical Magento Sales Report option "Order Created Date" will match your date range selection to the date that an order was created. "Order Updated Date" will match your date range selection to the date that an order was last updated.

From:
The date you wish the report data to start from.

To:

The date you wish the report data to end at.

Order Status:
The same as the option in the Magento Sales Report. Select your desired order statuses, alternatively leave as "Any" to include all order data in your report.

Get Quantity From:
This option allows you to decide whether to count the quantity of an item by how many were ordered or by how many were actually invoiced.

Use product cost From:
This is a very powerful feature that can be used in many ways. There are three options to choose from; Order Table, Product Cost Attribute and Hybrid of Both. Each option has its own benefits and pitfalls. Choosing the correct option here will depend on the individual needs, configuration and versions of one's Magento installation. Let us consider each option separately:

Order Table: The "Order Table" option takes the product cost data (or Cost of Goods Sold, COGs) of an order from the "sales_order" tables in your Magento installation. This provides the most accurate profit report as it captures the cost of a product at the time it was purchased. However, Magento only began collecting the cost of products data in the "sales_order" tables as of Magento version 1.4 on. Thus any orders that existed prior to your 1.4 upgrade will have no cost data associated to them. There is also no way to individually see your COGs figure as Magento's standard Sales Report only reports a figure for "profit". Worst still, if you are using an older version of Magento, until now, there was no way to see your store's performance in terms of profit.

Product Cost Attribute: The "Product Cost Attribute" option takes the product cost data from the actual value stored in each individual product's "cost" attribute found in the "Prices" menu when creating or editing products. This option is very useful for users of Magento versions prior to 1.4 where order cost data was not stored on an order level. It allows a profit report to be generated based on the cost value set in a product's attributes. This is a feature that has been found to be very useful and much required by many Magento users. The pitfall here is that in some circumstances, product cost data may change over time thus altering the results of the profit report. None the less it provides an excellent alternative to users who's product costs rarely change if ever.

Another unexpected, yet great, use for this option is the ability to be able to see the effect of product cost change to a business's bottom line.

E.g. Some Magento version 1.4 users will create a report using the "Order Table" cost option and will then subsequently change the cost of a product in their system and re-run the report with the "Product Cost Attribute" option set to see the effects of the product cost difference to their profits. This is a non-intentional yet a handy feature never the less.

Hybrid of Both: This option is most useful to those who have recently upgraded to Magento 1.4 and have many past orders with no cost data associated to them. From the upgrade, Magento will store cost data in the "sales_order" tables, but what about the Orders prior to the upgrade? This is where this option helps. When the Hybrid of Both option is selected, cost data is pulled from the product cost attribute where it does not exist in the "sales_order" tables. This makes it possible to at least make use of your valuable past data in visualizing your business's profit performance.

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