Customer Reports

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FAQs

General

Are Reports sortable?

All reports are sortable - simply click on the headers.

Can a report be exported?

All reports are exportable as a CSV.

Why are some results 'N/A' or simply blank?

This will be due to missing information, e.g. products that are sold which have not been assigned to a Department, or to a Brand with a blank entry in the name.

Real Time Data

Are the reports up to date?

All reports show a snapshot of data at the instant that they were generated. As such, they are always up to date.

The value of a Sales Order has changed; how will this be reflected in the reporting?

With the exception of Sales by User, all revenue reporting is done based on the Sales Order date. That means that a Sales Order that has a date of the 1st of October will always report its revenue as the 1st of October, even if new lines are added on the 1st November.

The Salesperson on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by User report.

The Store on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by Channel report.

What happens if a Product is deleted?

Some information is stored against the Sales Order, and IXO Commerce will report on that; other data is stored only against the product. This is done via a lookup of the product, and if that product has been deleted then it will not be possible to report on that data.

Stored against the Sales Order

- Sales Date
- Store
- User
- Source
- Payments
- Selling Price
- Cost Price
- Product Name
- Product SKU

Stored against the Product

- Brand Associations
- Category Associations

- Collection Associations
- Supplier Associations

Example

A product is sold in May for £10 at a cost price of £5. That product was a Lego Boat, associated with the Lego Brand.

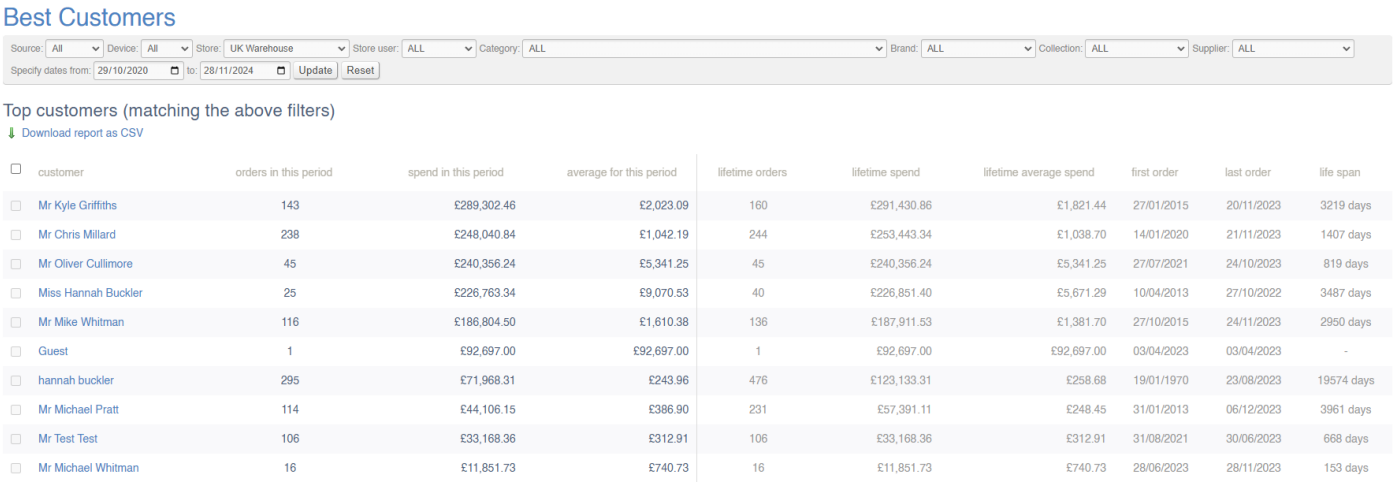
If that product is deleted, then the association with the Lego Brand will also be deleted. This means that while the selling price and cost price are still reportable (as data that is held against the sales order), that order line will no longer be associated with the Lego Brand.

This will mean that this order line will not be included if the user filters a report by Brand, and if they view the Sales by Brand report, it would add to the 'n/a' row.

Best Customers

This report will show a list of your best customers for a given period.

It is possible to add Customers to Customer Groups from this screen.



customer	orders in this period	spend in this period	average for this period	lifetime orders	lifetime spend	lifetime average spend	first order	last order	life span
Mr Kyle Griffiths	143	£289,302.46	£2,023.09	160	£291,430.86	£1,821.44	27/01/2015	20/11/2023	3219 days
Mr Chris Millard	238	£248,040.84	£1,042.19	244	£253,443.34	£1,038.70	14/01/2020	21/11/2023	1407 days
Mr Oliver Cullimore	45	£240,356.24	£5,341.25	45	£240,356.24	£5,341.25	27/07/2021	24/10/2023	819 days
Miss Hannah Buckler	25	£226,763.34	£9,070.53	40	£226,851.40	£5,671.29	10/04/2013	27/10/2022	3487 days
Mr Mike Whitman	116	£186,804.50	£1,610.38	136	£187,911.53	£1,381.70	27/10/2015	24/11/2023	2950 days
Guest	1	£92,697.00	£92,697.00	1	£92,697.00	£92,697.00	03/04/2023	03/04/2023	-
hannah buckler	295	£71,968.31	£243.96	476	£123,133.31	£258.68	19/01/1970	23/08/2023	19574 days
Mr Michael Pratt	114	£44,106.15	£386.90	231	£57,391.11	£248.45	31/01/2013	06/12/2023	3961 days
Mr Test Test	106	£33,168.36	£312.91	106	£33,168.36	£312.91	31/08/2021	30/06/2023	668 days
Mr Michael Whitman	16	£11,851.73	£740.73	16	£11,851.73	£740.73	28/06/2023	28/11/2023	153 days

Tagging Customers

Use the checkboxes to the left of the records to select customers to tag. Use the control at the bottom of the screen to choose which group to add them to.

> It is not possible to tag customers who have opted out of marketing.

Filters

This report may be filtered by:

- Source
- Device
- Store
- Store user
- Category
- Brand
- Collection
- Supplier
- Date Range

Key to icons

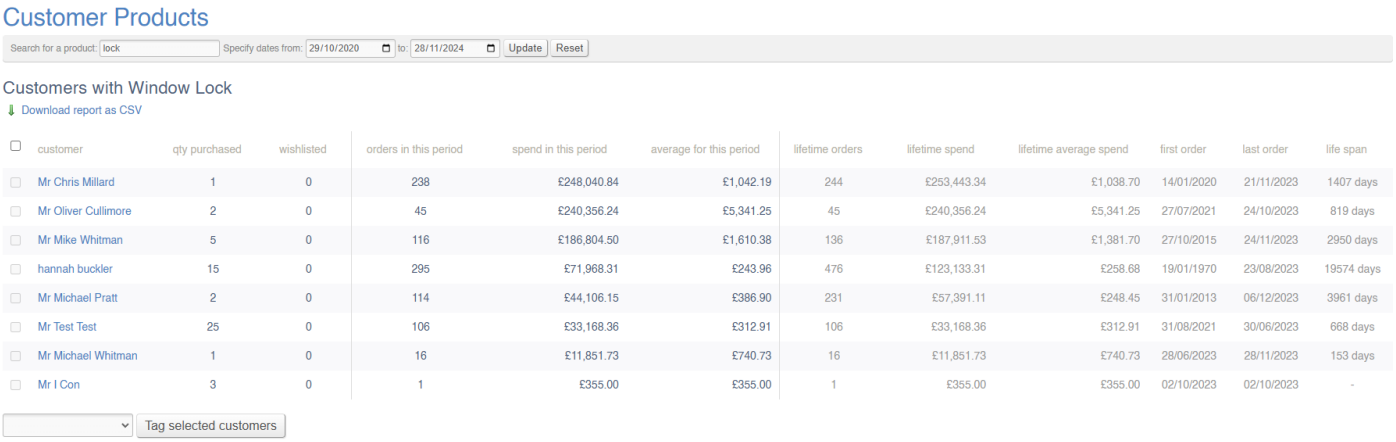
⬇ = download report

FAQs

FAQs for Customer Reports may be viewed here.

Customer Products

Report on customers who have purchased a specific product. You can search for a SKU Code or a Product Name.



Tagging Customers

Use the checkboxes to the left of the records to select customers to tag. Use the control at the bottom of the screen to choose which group to add them to.

> It is not possible to tag customers who have opted out of marketing.

Filters

This report may be filtered by:

- Date Range

Key to icons

⬇ = download report

FAQs

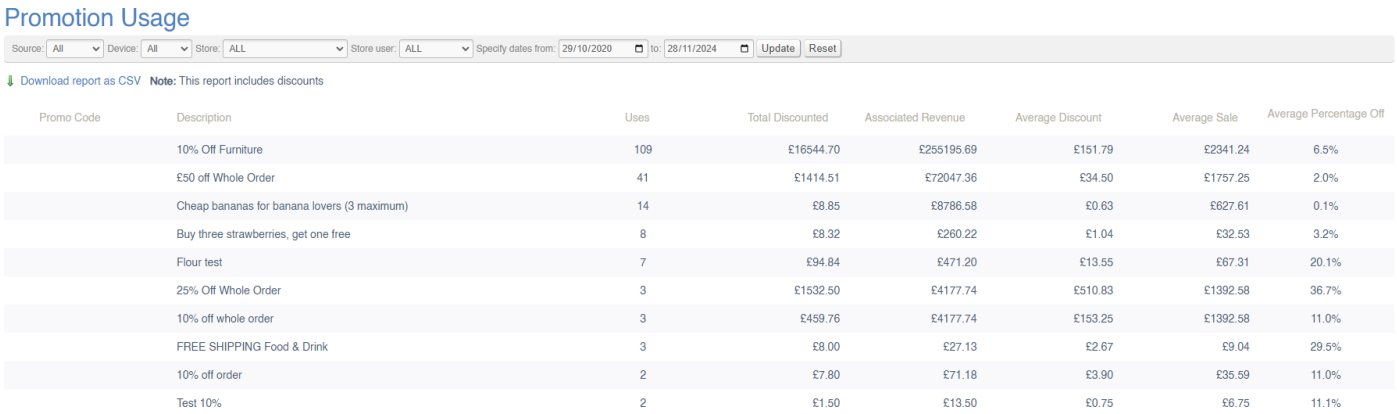
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Promotion Usage

The report lets you track the revenue added by each promotion. It shows each promotion, as well as how many uses, associated revenue and total discounts.

Figures shown only include orders which have been marked as completed, awaiting despatch, partially despatched, on order or partially returned.

> This report will not show manual discounts



Promo Code	Description	Uses	Total Discounted	Associated Revenue	Average Discount	Average Sale	Average Percentage Off
	10% Off Furniture	109	£16544.70	£255195.69	£151.79	£2341.24	6.5%
	£50 off Whole Order	41	£1414.51	£72047.36	£34.50	£1757.25	2.0%
	Cheap bananas for banana lovers (3 maximum)	14	£8.85	£8786.58	£0.63	£627.61	0.1%
	Buy three strawberries, get one free	8	£8.32	£260.22	£1.04	£32.53	3.2%
	Flour test	7	£94.84	£471.20	£13.55	£67.31	20.1%
	25% Off Whole Order	3	£1532.50	£4177.74	£510.83	£1392.58	36.7%
	10% off whole order	3	£459.76	£4177.74	£153.25	£1392.58	11.0%
	FREE SHIPPING Food & Drink	3	£8.00	£27.13	£2.67	£9.04	29.5%
	10% off order	2	£7.80	£71.18	£3.90	£35.59	11.0%
	Test 10%	2	£1.50	£13.50	£0.75	£6.75	11.1%

Filters

This report may be filtered by:

- Source
- Device
- Store
- Store user
- Date Range

Key to icons

⬇ = download report

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Ticket Sales

This report will show you Bookings made (tickets sold) for a given period.

It includes personal data for the customer, as well as a link to their Sales Order.

> This report will only be available if you are using the Bookings function.



Filters

This report may be filtered by:

- Date Range

Key to icons

⬇ = download report

FAQs

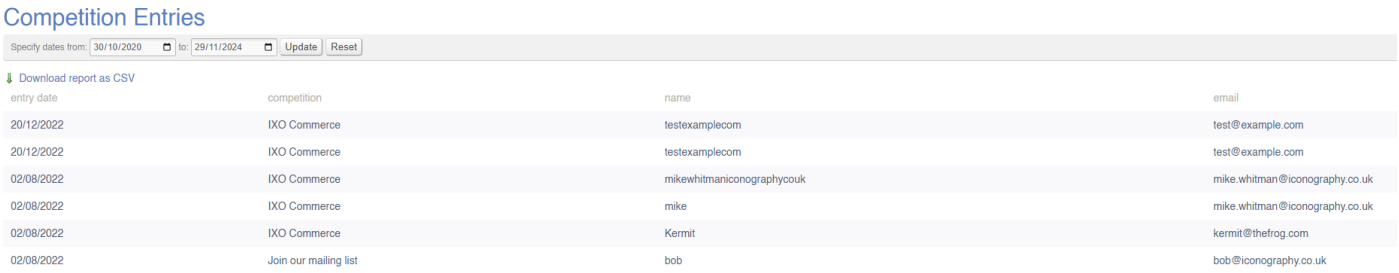
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Competition Entries

This report will show you competition entries within a given period.

This will show entrants in summary - to view the detail of their entry, including any answers they provided to competition questions, please export the report as a CSV.

> This report will only be available if you are using the Competition function.



Filters

This report may be filtered by:

- Date Range

Key to icons

⬇ = download report

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Aged Debtors

Balances are aged by the date of the account orders and debit adjustments that make them up, with payments clearing the oldest debts first. Any balance that can't be matched to a transaction is shown as Older.

