Other Reports

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- Performance by User
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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.

Search Log

This report will show you Site Searches made within a given period.

Unsuccessful searches are highlighted in red.

> This report is intended to be used in conjunction with Search Overrides to make the most of your popular searches, correct typos and mitigate unsuccessful searches



search phrase	average product results	number of searches
ball	7	8
test	31	3
bean	1	2
citru	2	2
apple	3	2
towels	12	2
sofa	27	2
shoe	120	2
helicotre	0	1
strawberry	1	1

On page load, it will show a word cloud of popular searches:



Filters

This report may be filtered by:

- Date Range
- All/Successful/Unsuccessful Searches

Key to icons

⬇ = download report

FAQs

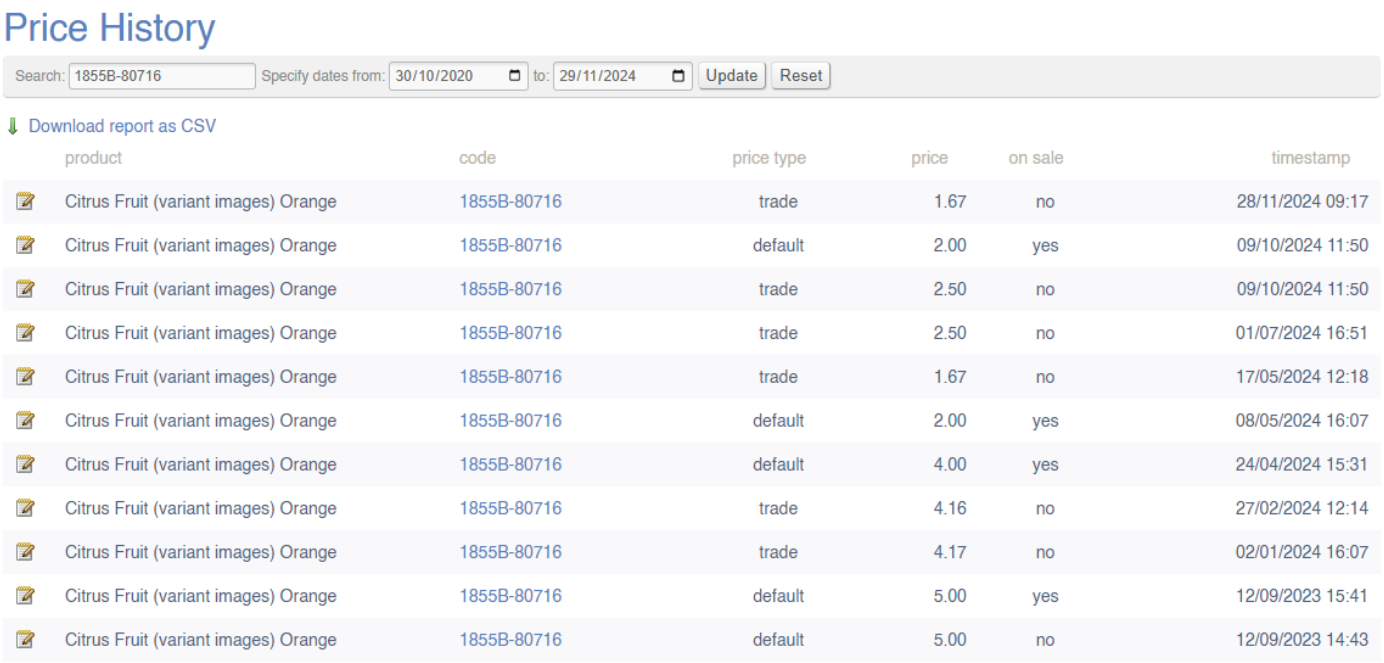
FAQs for Log Reports may be viewed here.

Price History

This report will show all price changes within a given period that have been viewed by a Customer. It may be searched by SKU code.

Prices will be listed as default (which includes retail, offer and RRP prices) and trade (which includes trade and trade offer prices).

> This will only show Price Changes that have been viewed by a Customer, e.g. when a Product is viewed in the POS, on your website, or when the item is added to a Sales Order.



product	code	price type	price	on sale	timestamp
Citrus Fruit (variant images) Orange	1855B-80716	trade	1.67	no	28/11/2024 09:17
Citrus Fruit (variant images) Orange	1855B-80716	default	2.00	yes	09/10/2024 11:50
Citrus Fruit (variant images) Orange	1855B-80716	trade	2.50	no	09/10/2024 11:50
Citrus Fruit (variant images) Orange	1855B-80716	trade	2.50	no	01/07/2024 16:51
Citrus Fruit (variant images) Orange	1855B-80716	trade	1.67	no	17/05/2024 12:18
Citrus Fruit (variant images) Orange	1855B-80716	default	2.00	yes	08/05/2024 16:07
Citrus Fruit (variant images) Orange	1855B-80716	default	4.00	yes	24/04/2024 15:31
Citrus Fruit (variant images) Orange	1855B-80716	trade	4.16	no	27/02/2024 12:14
Citrus Fruit (variant images) Orange	1855B-80716	trade	4.17	no	02/01/2024 16:07
Citrus Fruit (variant images) Orange	1855B-80716	default	5.00	yes	12/09/2023 15:41
Citrus Fruit (variant images) Orange	1855B-80716	default	5.00	no	12/09/2023 14:43

Filters

This report may be filtered by:

- SKU
- Date Range

Key to icons

⬇ = download report

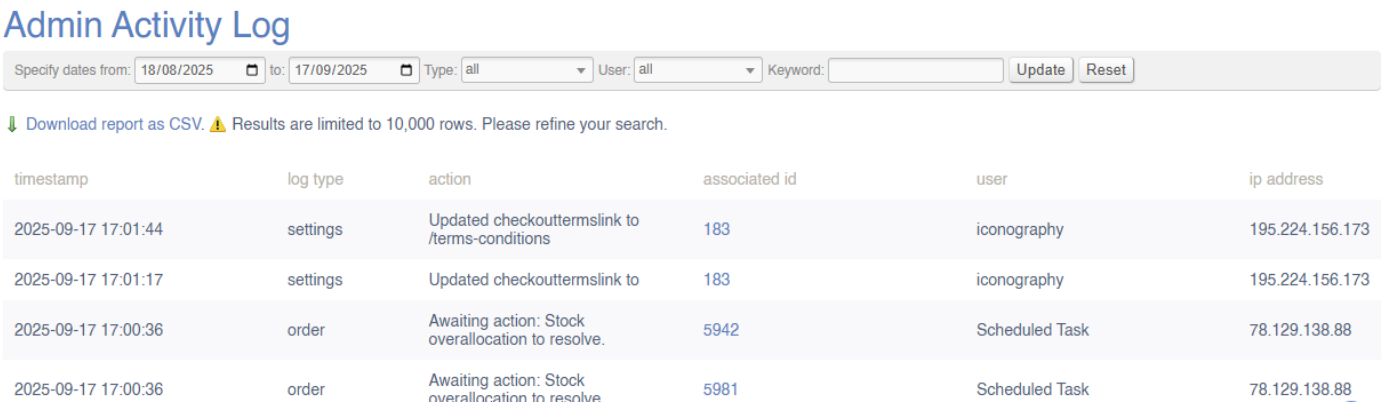
FAQs

FAQs for Log Reports may be viewed here.

Admin Activity Log

This report will keeps a log of user activity within the CMS. It will show you who has logged in and what they have changed.

> It is not possible to undo changes that have been made - this report is solely for indicative purposes



Data is held on all activity within the CMS, from logging into the system up to amending pages, products and more. IXO Commerce logs activity, but does not record the previous figure in most instances. If a user changes a product name from 'Nike Running Shoe' to 'Running Shoe', the change would be recorded, but neither the precise field nor the historical value would be recorded.

timestamp	log type	action	associated id	user	ip address
2024-11-29 13:00:57	product	Updated product overview	39037	iconography	195.224.156.173

More granular information is recorded against certain actions. These include, but are not limited to:

- Sales Order management
- Purchase Order management

More granular information relating to stock and prices are to be found on the Price History and Stock History reports respectively.

Filters

This report may be filtered by:

- Date Range
- Type

- User
- Keyword (e.g. partial text match for 'action' column)

Key to icons

⬇ = download report

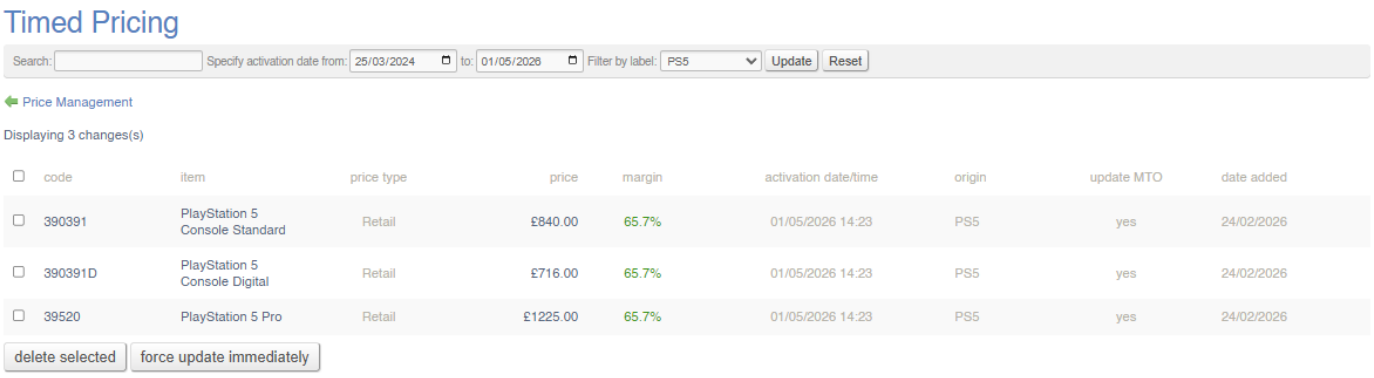
FAQs

FAQs for Log Reports may be viewed here.

Timed Pricing

This screen will show all queued price changes that have been added via the Price Management screen.

> It is not possible to edit price changes once they have been added, merely cancel them



Use the tick boxes on the left to select Timed Pricing changes to cancel.

Filters

This report may be filtered by:

- Search (by SKU or Product Name)
- Date Range
- Label (choose from drop down)

Actions

You may select price changes in bulk and either:

- delete them
- force update immediately (overrides the schedule and activates the price immediately)

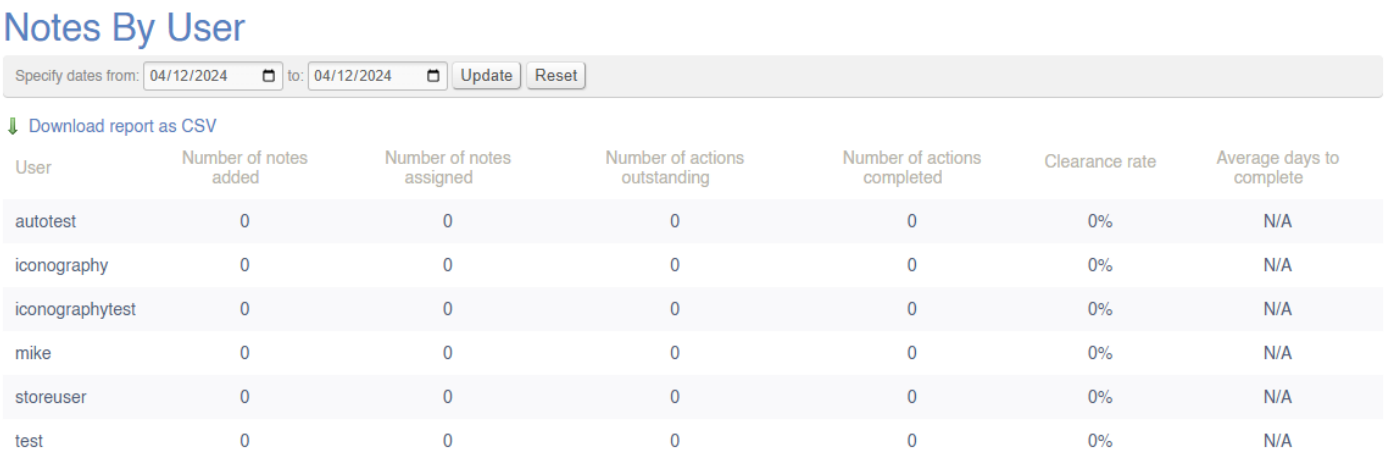
FAQs

FAQs for Log Reports may be viewed here.

Notes by User

This report shows a summary of notes by User.

This is a summary of the Tasks within the CRM.



User	Number of notes added	Number of notes assigned	Number of actions outstanding	Number of actions completed	Clearance rate	Average days to complete
autotest	0	0	0	0	0%	N/A
iconography	0	0	0	0	0%	N/A
iconographytest	0	0	0	0	0%	N/A
mike	0	0	0	0	0%	N/A
storeuser	0	0	0	0	0%	N/A
test	0	0	0	0	0%	N/A

Filters

This report may be filtered by:

- Date Range

Key to icons

⬇ = download report

FAQs

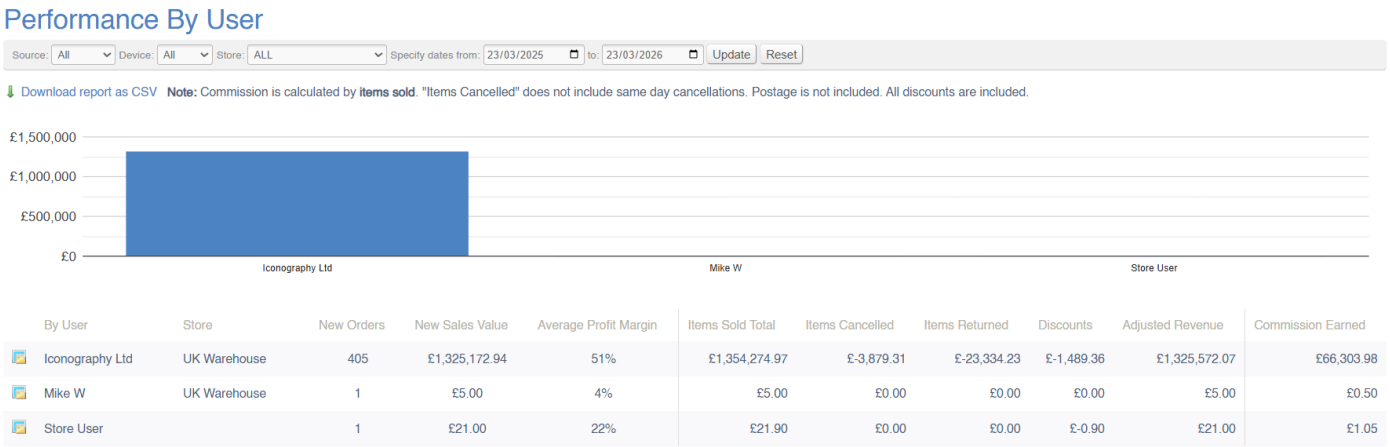
FAQs for Log Reports may be viewed here.

Performance by User

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by User (Salesperson). This list is based on the data you have set up in the Update Users menu. This report can also be used to calculate commission.

> Sales Orders can each be attributed to a single Salesperson. This can be edited within the Sales Order management screen.

> Sales Orders without a Salesperson will be omitted from this report.



By User	Store	New Orders	New Sales Value	Average Profit Margin	Items Sold Total	Items Cancelled	Items Returned	Discounts	Adjusted Revenue	Commission Earned
Iconography Ltd	UK Warehouse	405	£1,325,172.94	51%	£1,354,274.97	£-3,879.31	£-23,334.23	£-1,489.36	£1,325,572.07	£66,303.98
Mike W	UK Warehouse	1	£5.00	4%	£5.00	£0.00	£0.00	£0.00	£5.00	£0.50
Store User		1	£21.00	22%	£21.90	£0.00	£0.00	£-0.90	£21.00	£1.05

Data Explanation

This report is split into two sections; 'sales data' and 'adjusted sales data'

Sales Data

This section of the report performs exactly like a standard Sales Report (see 'what is a sale'?). This includes:

Field	Purpose
New Orders	*Total number of new sales orders, e.g. sales orders created within the selected date range*
New Sales Value	*Total value of those new sales orders, e.g. sales orders created within the selected date range*

Field	Purpose
Average profit margin	*Average margin on those new sales orders, e.g. sales orders created within the selected date range*

Adjusted Total

These figures to the right of the first dividing line are *adjusted figures*; that means that they have been adjusted to take into account changes on a line by line basis. Rather than reflecting the Sales Order date, these figures reflect the date against the Sales Order line.

For example, a £1000 widget is sold on the 1st of May, creating a new Sales Order. On the 1st June, a second widget is added for £1000. The total value of that Sales Order is £2000, but it would only show as a new Sales Order on a report run on May's sales figures. If the report were run for June, the second widget would be included under 'items sold total'.

Field	Purpose
Items sold total	Total value of items sold within the period, based on 'date added' as stored against each Sales Order line > This is not based on the sales date of the Sales Order
Items cancelled	Total value of items cancelled against Sales Order where 'date cancelled' (stored against the Sales Order line) is within the selected date range
Items returned	Total value of items returned against Sales Order where 'date returned' (stored against the Sales Order line) is within the selected date range
Discounts	Total value of discounts on Sales Order lines where 'date added' (stored against the Sales Order line) is within the selected date range
Adjusted Revenue	The sum of the preceding columns

Commission

This column shows the commission due to each Sales Person.

> Please ensure that you have spoken to Iconography to setup your commission rules

Commission is calculated user the commission rate set against each user in the Update Users screen:

1. As a percentage of the value of items sold

The commission for this period will be calculated as a percentage of the total value of items sold during the specified timeframe. However, deductions will be applied for any items that were either returned or cancelled within the same period. These deductions will be based on the data reflected in the 'Cancelled' and 'Returns' columns of the report. The final commission amount will be adjusted accordingly to ensure it reflects only completed and successful sales.

The report will be adjusted appropriately for items returned/cancelled during that time period for all orders, regardless of when they are placed.

2. As a percentage of the value of items delivered

The commission for this period will be calculated as a percentage of the total value of items delivered during the specified timeframe, based on the delivery date. Deductions will be made for any items that were returned within the same period, as indicated in the 'Returns' column of the report. The final commission amount will be adjusted to reflect only those sales where the items were successfully delivered and not returned.

The report will be adjusted appropriately for items returned during that time period for all orders, regardless of when they are placed.

3. As a percentage of the value of payments

The report will be adjusted appropriately for refunds during that time period for all orders, regardless of when they are placed.

Returns, Refunds, Cancellations and Clawbacks

Sales Data:

1. **Orders within the Period**

- **Order 1**: Placed on **1st September**, delivered on **5th October**, total value: **£100**
- **Order 2**: Placed on **3rd October**, delivered on **7th October**, total value: **£150**
- **Order 3**: Placed on **10th October**, delivered on **12th October**, total value: **£200**

1. **Returns within the Period**:
   - **Return for Order 1**: The customer returned the item on **20th October** (also within the report period).
   - **Return for Order 2**: The customer returned the item on **15th October** (within the report period).
   - **Cancellation for Order 3:** The customer changed their mind, and cancelled the original line item, and added a new one in a different colour on the **10th October**; the original line is counted neither as a sale, nor as a cancellation, as it was cancelled on the same day it was added to the order. The new line is counted as normal.

2. **Commission Calculation**:
   - Let’s say the commission rate is **10%**.
   - The total sales amount for the period (1st October - 20th October) is: £100 (Order 1) + £150 (Order 2) + £200 (Order 3) = **£450**.
3. **Deductions for Returns**:
   - Since both **Order 1** and **Order 2** were returned within the reporting time period, their values will be deducted from the commission total.
   - Total returns: £100 (Order 1) + £150 (Order 2) = **£250**.
4. **Adjusted Sales for Commission**:
   - Adjusted sales amount = £450 (total sales) - £250 (returns) = **£200**.
5. **Commission Earned**:
   - Commission = 10% of £200 = **£20**.

In this example, even though **Order 1** was placed in September and **Order 2** was placed earlier in October, but both of their returns fall within the specified period (1st October - 20th October). As such, they are deducted from the total sales before calculating the commission. The commission earned would be **£20**.

Filters

This report may be filtered by:

- Source
- Device
- Store
- Date Range

Key to icons

 = view sales from this User in the Sales by Category report (matching any other filters applied)

 = download report

> For more information on margin calculation, click here

FAQs

FAQs for Sales Reports may be viewed here.

Wishlisted Items

This report will show you a list of Products which have been added to Customer Wishlists via your website.



Filters

This report may be filtered by:

- Date Range

Key to icons

= view Customers who wishlisted this item

> Note that because it is possible to create a wishlist without being logged in, the list of Customers may include blank entries

