

Hikashop Reports Component by Brainforge.UK

1 Introduction

This component provides a selection of sales / orders reports for Hikashop.

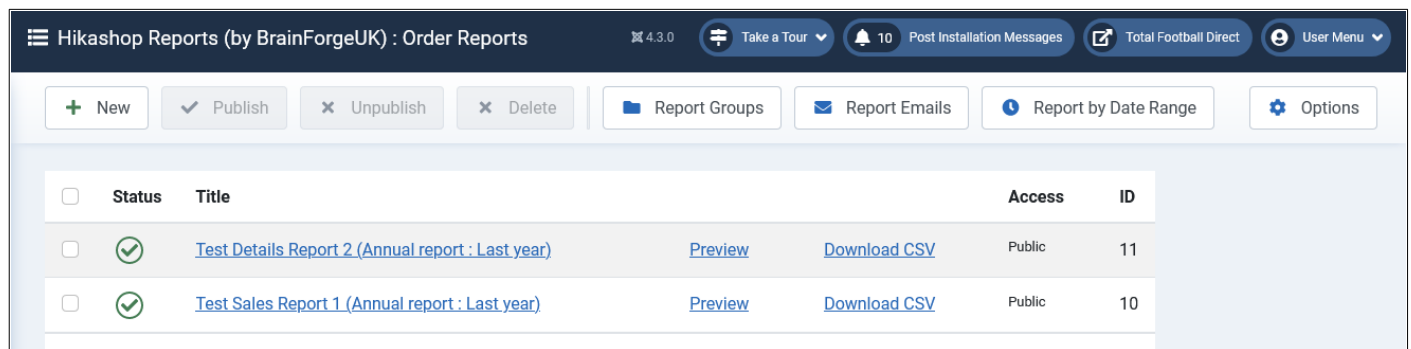
These reports can be shown on screen or emailed to a recipient.

Reports can be emailed automatically using *wget* with scheduled tasks (Linux cron). For instance a report for the previous month can be automatically emailed to your sales team on the 1st of each month.

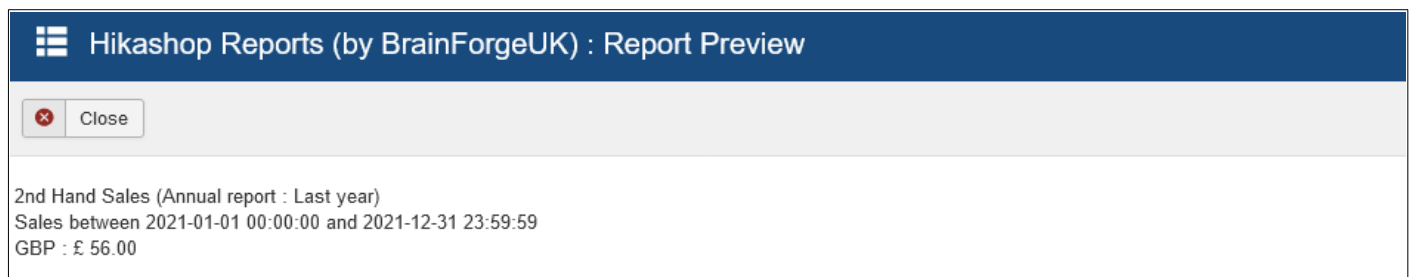
1.1 Order Reports

You can define yearly, monthly, weekly and daily reports of total sales information here.

For each report a *Preview* feature is available.



Status	Title	Access	ID
✓	Test Details Report 2 (Annual report : Last year)	Public	11
✓	Test Sales Report 1 (Annual report : Last year)	Public	10



Hikashop Reports (by BrainForgeUK) : Report Preview
2nd Hand Sales (Annual report : Last year) Sales between 2021-01-01 00:00:00 and 2021-12-31 23:59:59 GBP : £ 56.00

Report data can include the following:

- Details (includes ordered product information)
- Discounts
- Orders (count of orders, not value)
- Sales (value of orders, default)
- Shipping
- Tax

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1.2 Report Groups

You can combine several reports into a group. This enables you to include several reports in a report email. The *Download CSV* feature allows you to load the data into a spreadsheet for further processing.

The screenshot shows the 'Report Groups' management interface. At the top, there's a header with the title 'Hikashop Reports (by BrainForgeUK) : Report Groups' and version '4.3.0'. Below the header is a toolbar with buttons: '+ New', 'Publish', 'Unpublish', 'Delete', 'Order Reports', 'Report Emails', 'Report by Date Range', and 'Options'. The main content area is a table with columns: 'Status', 'Title', 'Access', and 'ID'. There is one entry with a green checkmark status, titled 'Test Report Group', with 'Public' access and ID '2'. Below the title, there are links for 'Preview' and 'Download CSV'.

Status	Title	Access	ID
<input checked="" type="checkbox"/>	Test Report Group	Public	2

The screenshot shows the 'Group Preview' interface. It has a header with the title 'Hikashop Reports (by BrainForgeUK) : Group Preview' and a 'Close' button. The main content area is titled 'Key Sales' and contains three sections of sales data for the last year (2021-01-01 to 2021-12-31):

- Featured Sales (Annual report : Last year)
Sales between 2021-01-01 00:00:00 and 2021-12-31 23:59:59
GBP : £ 48,208.00
- Top Value Sales (Annual report : Last year)
Sales between 2021-01-01 00:00:00 and 2021-12-31 23:59:59
GBP : £ 384.00
- 2nd Hand Sales (Annual report : Last year)
Sales between 2021-01-01 00:00:00 and 2021-12-31 23:59:59
GBP : £ 56.00

1.3 Report Emails

The screenshot shows the 'Report Emails' management interface. At the top, there's a header with the title 'Hikashop Reports (by BrainForgeUK) : Report Emails' and version '4.3.0'. Below the header is a toolbar with buttons: '+ New', 'Publish', 'Unpublish', 'Delete', 'Order Reports', 'Report Groups', 'Report by Date Range', and 'Options'. The main content area is a table with columns: 'Status', 'Title', 'Send Email', 'Access', and 'ID'. There is one entry with a green checkmark status, titled 'Test email', with 'sales-team@your-site.co.uk' as the email address, 'Public' access, and ID '3'. Below the title, there are links for 'Preview' and 'Download CSV'.

Status	Title	Send Email	Access	ID
<input checked="" type="checkbox"/>	Test email	sales-team@your-site.co.uk	Public	3

In addition to manually sending an email using the *Send Email* link above you can also automatically send emails at regular intervals (e.g. weekly or monthly). On a Linux system use *cron* and call the *Send Email* link using the *wget* command. See section 2.3 for more details.

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1.4 Report by Date Range

Reports can also be generated for sales information between 2 specific dates, as opposed to the generic ‘last year’, ‘last month’, ‘yesterday’ settings frequently used when automatically sending reports by email.

The *Start* and *End* dates will override the configured yearly, monthly, weekly and daily settings for each report in the group.

The screenshot shows the 'Hikashop Reports (by BrainForgeUK) : Report by Date Range' interface. At the top, there is a navigation bar with a hamburger menu, the title 'Hikashop Reports (by BrainForgeUK) : Report by Date Range', version '4.3.0', and links for 'Take a Tour', 'Post Installation Messages', 'Total Football Direct', and 'User Menu'. Below the navigation bar, there is a row of buttons: 'On Screen Display', 'CSV Download', 'Order Reports', 'Report Groups', 'Report Emails', and 'Options'. The main content area has a light blue background. On the left, there are labels for 'With tax', 'Report Group', 'Start date *', and 'End date *'. To the right of 'With tax' are two buttons: 'Report' and 'Report Group'. Below 'Report Group' is a dropdown menu with the text '-- Select --'. Below 'Start date *' and 'End date *' are two text input fields, each with a calendar icon on the right.

You can run this for either a *Report Group* or an individual *Report*.

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2 Configuration

2.1 Order Reports

The first step is to define one or more reports which can then be assigned to one or more report groups.

The screenshot shows the Hikashop Reports configuration interface. The form is titled "2nd Hand Sales". It includes the following fields and options:

- Name ***: 2nd Hand Sales
- Report type**: Annual report (dropdown)
- Report period**: Last year (dropdown)
- Order status ***: confirmed (button with close icon)
- Report data ***: Sales (dropdown)
- With tax**: No (selected), Yes
- Include shipping**: No (selected), Yes
- Include coupon**: No (selected), Yes
- Only include these products in sales report :**
 - Product categories**: Second Hand (button with close icon)
 - Sub categories**: No (selected), Yes
- Exclude these products from sales report :**
 - Product categories**: (empty field)
 - Sub categories**: No (selected), Yes
- Report on orders using these shipping methods :**
 - Shipping methods**: All (button with close icon)
- Report on orders using these payment methods :**
 - Payment methods**: All (button with close icon)
- Status**: Unpublished, Published (selected)
- Access**: Public (dropdown)
- Note**: (empty text area)
- ID**: 1 (dropdown)

Buttons at the top: Save, Save & Close, Save & New, Save as Copy, Cancel.

When creating / editing a summary report the available options change according to which of the following are selected:

- **Report type**
Annual, monthly, weekly, daily.

For correct operation of *weekly* reports you may need to adjust the *First Day of Week* settings in the component options.

- **Report type**
Discounts, sales, orders, shipping, tax.

Setting the *Report type* to *orders* gives you a count of the number of orders which meet the selected criteria, the other settings show the total value grouped by order currency.

When selecting *Order status*, depending on your order handling, it may not be sufficient to just select *Confirmed* order status – you may also need to include *Shipped*, *Collected* etc..

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2.2 Report Groups

The previously defined reports can then be assigned to one or more report groups.

Hikashop Reports (by BrainForgeUK) : Edit Report Group

Save

Save & Close

Save & New

Save as Copy

Cancel

Group title *

Key Sales

Reports in group

Report *

+ Featured Sales

x

Report *

+ Top Value Sales

x

Report *

+ 2nd Hand Sales

x

Status

Unpublished

Published

Access

Public

Note

ID

2

The order in which the reports appear in the email can be controlled by changing their position in the email edit form (use the left-hand grab bar).

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2.3 Report Emails

The previously defined reports / report groups can then be assigned to one or more report emails.

The screenshot shows the 'Create Report Email' form in the Hikashop Reports component. The form is divided into several sections:

- Buttons:** Save, Save & Close, Save & New, Save as Copy, Cancel.
- Email title *:** Text input field with 'Test email'.
- Email address *:** Text input field with 'sales-team@your-site.co.uk'.
- Attachment:** Radio buttons for 'None' and 'CSV'.
- Email body:** Radio buttons for 'Heading Only' and 'Complete'.
- Filename *:** Text input field with 'hikashopbfreport-{YmdHis}'. Below it, a note states: 'The suffix (e.g. .csv) can be omitted as it is automatically generated. You can include the date and time of the email by using a PHP date format string enclosed in curly brackets (e.g. {YmdHis}).'
- Content:** Radio buttons for 'Report' and 'Report Group'.
- Report Group:** Dropdown menu with 'Test Report Group' selected.
- Email key:** Text input field with '60bc1452f933c256f8b8e5fa1ddb9de'.
- Status:** Radio buttons for 'Unpublished' and 'Published'.
- Access:** Dropdown menu with 'Public' selected. Below it, a note states: 'The access level group that is allowed to view this item.'
- Note:** Text input field.
- ID:** Text input field with '4'. Below it, a note states: 'Record number in the database.'

At the bottom, there is a 'Send Email' button and a note: 'For scheduled emails (when using cron) copy the link and use the 'wget' command.'

Without an attachment the complete report is displayed in the email body. A CSV attachment is useful for importing the data into a spreadsheet or an accounting tool. When a CSV attachment is used you have the option of reducing the email body to only show the report heading.

The *Email key* is automatically generated and can be used to send the email from a scheduled task (Linux cron) using *wget*.

The link used to send the email looks like this:

```
https://yoursite.shop/?option=com_hikashopbfreports&email_key=813fa2fbd99243c31a56deb1ff9aefb0
```

A typical cron command (on a Linux server managed through Plesk) would look like this:

```
wget -O - - 'https://yoursite.shop/?option=com_hikashopbfreports&email_key=813fa2fbd99243c31a56deb1ff9aefb0'
```

Don't forget to wrap the URL with quotes – in order to escape character specials to your shell (e.g. &).

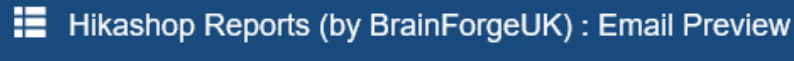
The `-O -` option sends the output to stdout. Using a Plesk managed server you have ability to control what to do with this – as well as other *wget* command line options.


The optional CSV attachment is intended to provide the data in an easily machine readable format for use by your own custom scripts / spreadsheet macro etc..

The CSV filename is customisable, and can include the date and time of creation (as in the filename form field default value).

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Appendix 1 Example Summary Report Email Preview



 Close

Monthly Report for accounts@myhikashop.com

Total Sales
Sales between 2021-08-01 00:00:00 and 2021-08-31 23:59:59
GBP : £ 28,569.20

Total 2nd Hand Sales
Sales between 2021-08-01 00:00:00 and 2021-08-31 23:59:59
GBP : £ 2,075.00

Total Shipping
Shipping between 2021-08-01 00:00:00 and 2021-08-31 23:59:59
GBP : £ 3,225.50

Total Tax
Tax between 2021-08-01 00:00:00 and 2021-08-31 23:59:59
GBP : £ 4,827.80


Total Orders
Orders between 2021-08-01 00:00:00 and 2021-08-31 23:59:59
53

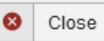
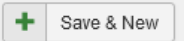
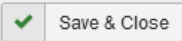

You can change the date / time format of the *Sales between ...* text using Joomla language overrides. The default setting is:

Language Constant
COM_HIKASHOPBFREPORTS_EMAIL_REPORTFOR_DATEFORMAT

Text
Y-m-d H:i:s

Refer to <https://www.php.net/manual/en/datetime.format.php> for available format characters.





Edit this Override

Language

English (United Kingdom) [en-GB]

Location

Administrator

Language Constant *

COM_HIKASHOPBFREPORTS_EM

Text

Y-M-d H:i:s

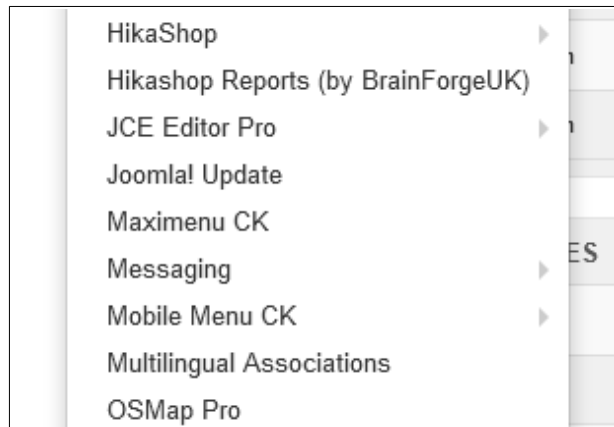
For Both Locations

☐

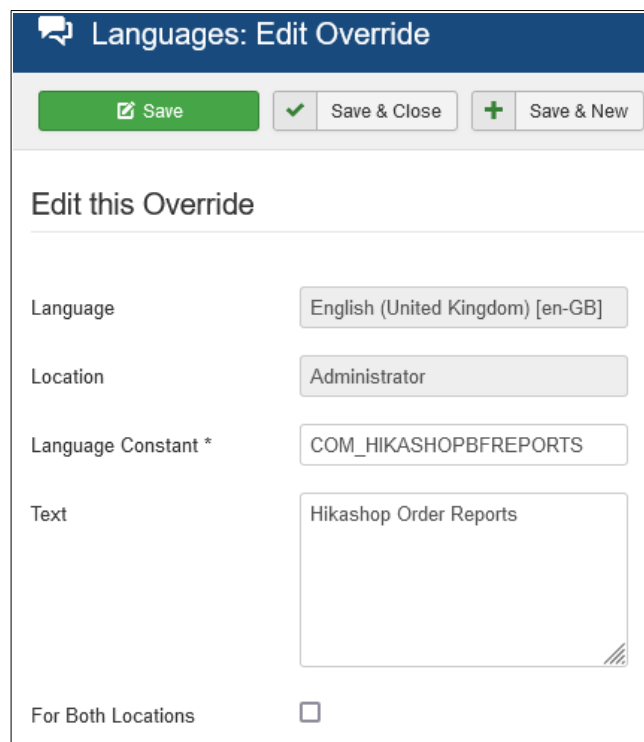
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Appendix 2 Component Menu Item Title

By default the menu item appears like this:



If you prefer you can change this using Joomla language overrides such as:

A screenshot of the Joomla! 'Languages: Edit Override' form. The form has a blue header with a speech bubble icon and the title 'Languages: Edit Override'. Below the header are three buttons: 'Save' (green), 'Save & Close' (grey), and 'Save & New' (grey). The main section is titled 'Edit this Override'. It contains four fields: 'Language' with a dropdown menu showing 'English (United Kingdom) [en-GB]', 'Location' with a dropdown menu showing 'Administrator', 'Language Constant *' with a text input field containing 'COM_HIKASHOPBFREPORTS', and 'Text' with a large text area containing 'Hikashop Order Reports'. At the bottom, there is a checkbox labeled 'For Both Locations' which is currently unchecked.

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Appendix 3 Component Options

Appendix 3.1 Basic

Appendix 3.2 Permissions

Action	Select New Setting	Calculated Setting
Configure ACL & Options	Inherited	Not Allowed (Inherited)
Access Administration Interface	Allowed	Allowed
Report Administration	Inherited	Not Allowed (Inherited)
Group Administration	Inherited	Not Allowed (Inherited)
Email Administration	Inherited	Not Allowed (Inherited)

The permissions shown above will allow shop staff to run a report for a date range (section 1.4) but will not allow them to create / modify the report / group / email configurations.

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Appendix 4 Debug Feature

When checking a report it is often convenient to test it against a single order using the *preview* feature like this:

```
https://yoursite.shop/administrator/index.php?
option=com_hikashopbfreports&view=report&layout=preview&report_id=7&order_id=12345
```

Note that the order must meet all the report criteria (e.g. product categories), otherwise the result will be zero!

Appendix 5 Custom Item Fields Affecting the Price

If you have custom item fields (e.g. weight or length of item ordered) which affect the price the customer pays then the sales results obtained using this component may not work as expected.

This component recognises the Hikashop Item Custom Field Quantity Handler Plugin (`plg_system_bfhikashopitemqtyfield`), also by BrainforgeUK, and caters for item order weights etc. accordingly.

The `plg_system_bfhikashopitemqtyfield` plugin handles order item price calculation for items which have a custom field which affects the price.

Typically such custom fields include one of the following.

- *Weight (kg) - using field named 'item_weightkg'.*
- *Length (m) - using field named 'item_lengthm'.*
- *Width (m) - using field named 'item_widthm'.*