Hikashop Reports Component by Brainforge.UK

1 Introduction

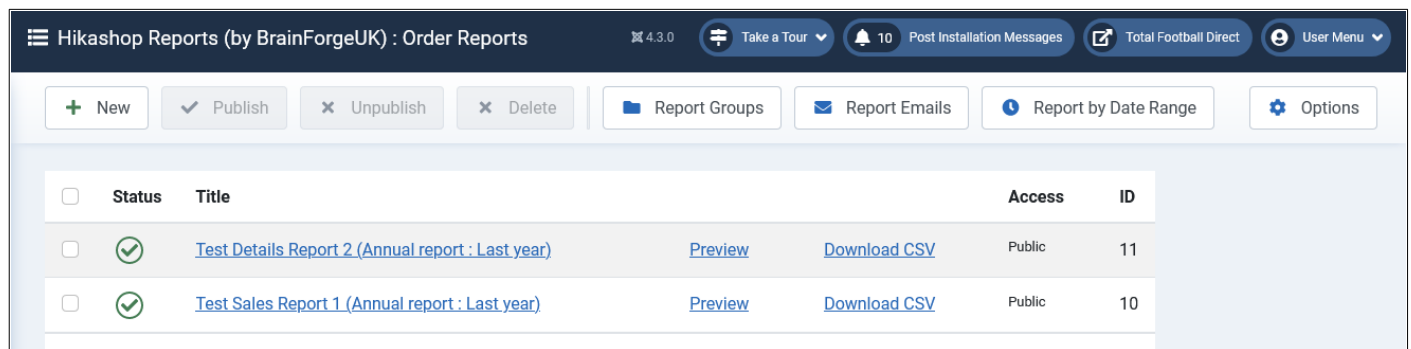This component provides a selection of sales / orders reports for Hikashop.

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.
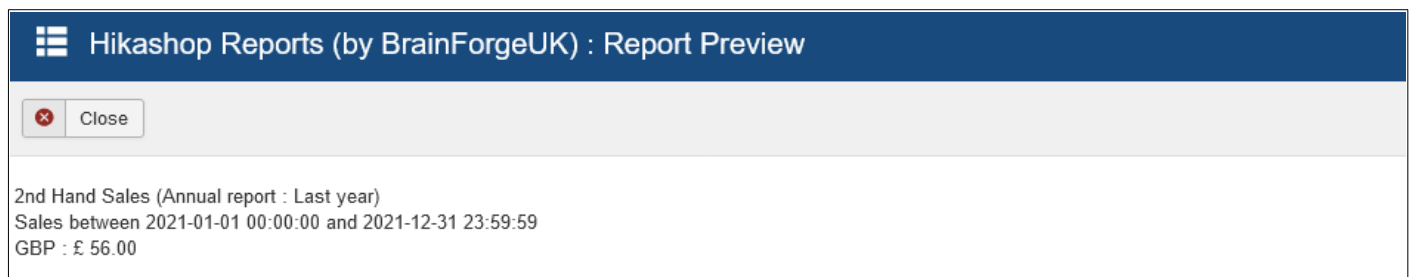
1.1 Order Reports

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

For each report a *Preview* feature is available.

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.

1.3 Report Emails

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.

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.

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

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.

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.

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.

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'
```

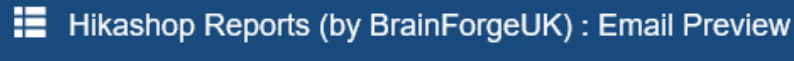Don't forget to wrap the URL with quotes – in order to escape character specials to your shell (e.g. &).

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

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

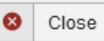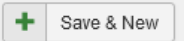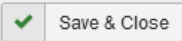| Language Constant	Text
COM_HIKASHOPBFREPORTS_EMAIL_REPORTFOR_DATEFORMAT	Y-m-d H:i:s

Refer to https://www.php.net/manual/en/datetime.format.php for available format characters.
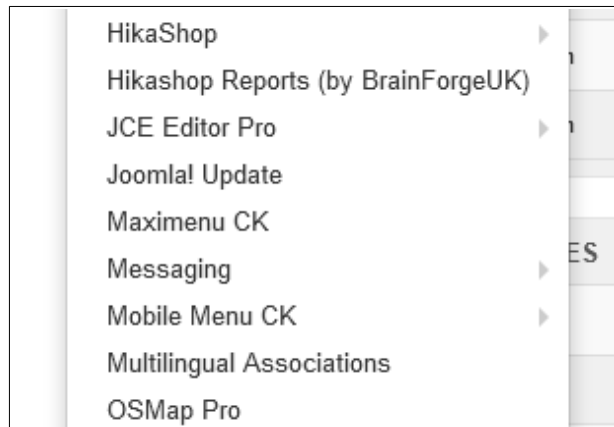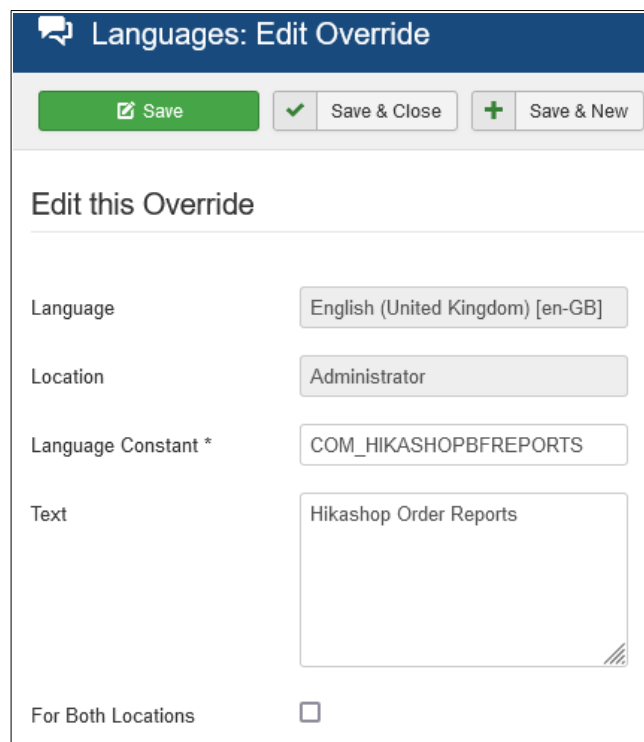
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Appendix 2 Component Menu Item Title

By default the menu item appears like this:

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

Appendix 3 Component Options

Appendix 3.1 Basic

Appendix 3.2 Permissions

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 configuarions.

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'.*