

## Analytics for Magento 2.0

### USER GUIDE

Version 1.0

✉ [support@exto.io](mailto:support@exto.io)

🌐 <https://exto.io/analytics-for-magento-2.html>



Analytical tool for your Magento store with capabilities for sales, products and other data

Study the key metrics of sales, customer base, marketing efforts and more, using comfortable intuitive interfaces specially crafted for data analysis.

See overview of all sales for a given period with a date picker to to select comparison period

Generate attribute report to understand performance per attribute, such as category, manufacturer, size, color etc.

Generate report chart to visualize the data and create product-specific or product comparison reports

Configurable data representation and custom interfaces designed for working with big data massives

# Table of contents

## [1. Quick Start](#)

### [1.1 Installation](#)

### [1.2 Configuration](#)

## [2. Reports Overview](#)

### [2.1 Main Interface](#)

### [2.2 Report Types](#)

#### [2.2.1 Sales Overview](#)

#### [2.2.2 Sales By Product](#)

#### [2.2.3 Sales by Attribute](#)

## [3. Additional information](#)

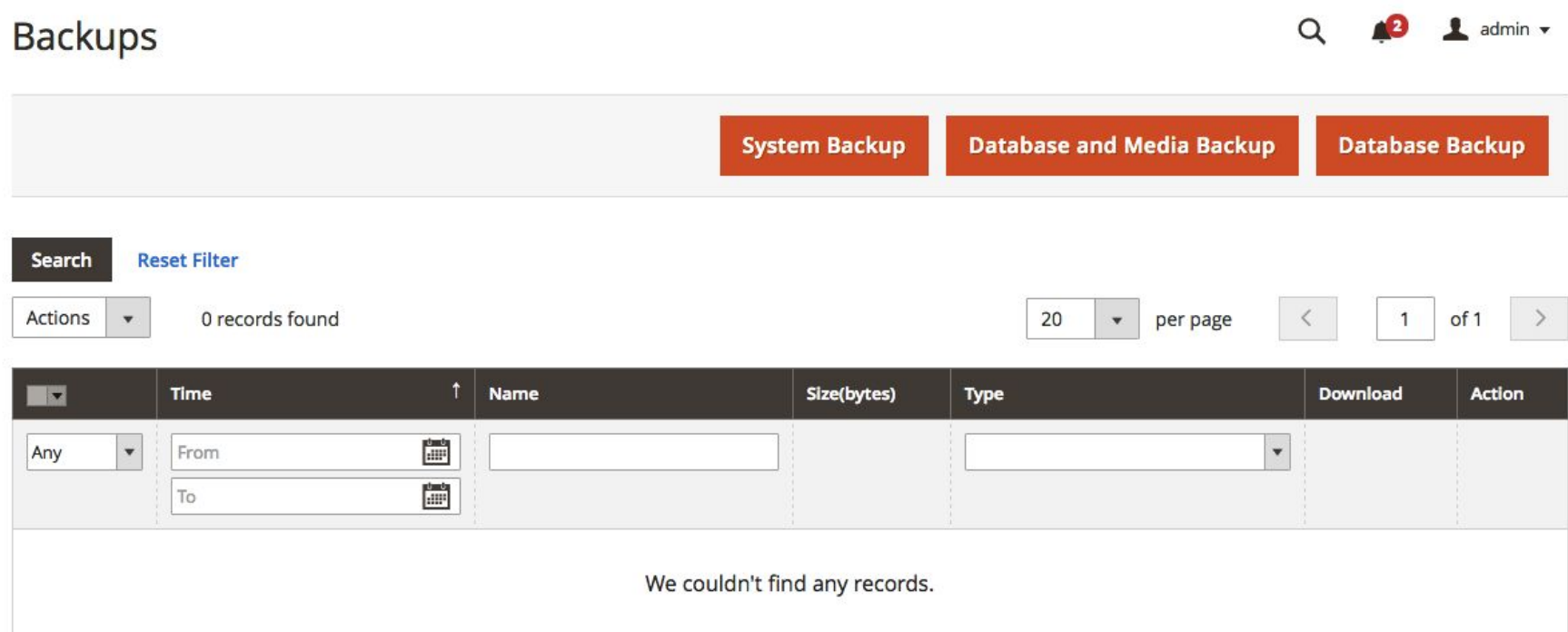
# 1. Quick Start

## 1.1 Installation

1. Back up your web directory and store database. You can make backup copies with any tool you find appropriate. If you are going to use the native Magento backup function, then navigate to:

Systems > Tools > Backups

and make **System** and **Database** backups



Backups

System Backup Database and Media Backup Database Backup

Search Reset Filter

Actions 0 records found 20 per page 1 of 1

Time	Name	Size(bytes)	Type	Download	Action
From					
To					

We couldn't find any records.

Image 1. Create backups

2. Download the Exto Analytics installation package.
3. Upload the contents of the Exto Analytics installation package to your store root directory.
4. In the SSH console of your server navigate to your store root folder:

```
cd path_to_the_store_root_folder
```

Then run:

```
php -f bin/magento module:enable Exto_Analytics
```

Next run:

```
php -f bin/magento setup:upgrade
```

Then run:

```
php -f bin/magento setup:static-content:deploy
```

Finally run:

```
php -f bin/magento cache:clean  
php -f bin/magento cache:flush
```

Flush the store cache, log out from the backend and then log in again.

## 1.2 Configuration

The extension's general settings are located under the **Stores** backend section:

[Stores](#) > [Configuration](#) > [Exto](#) > [Analytics](#)

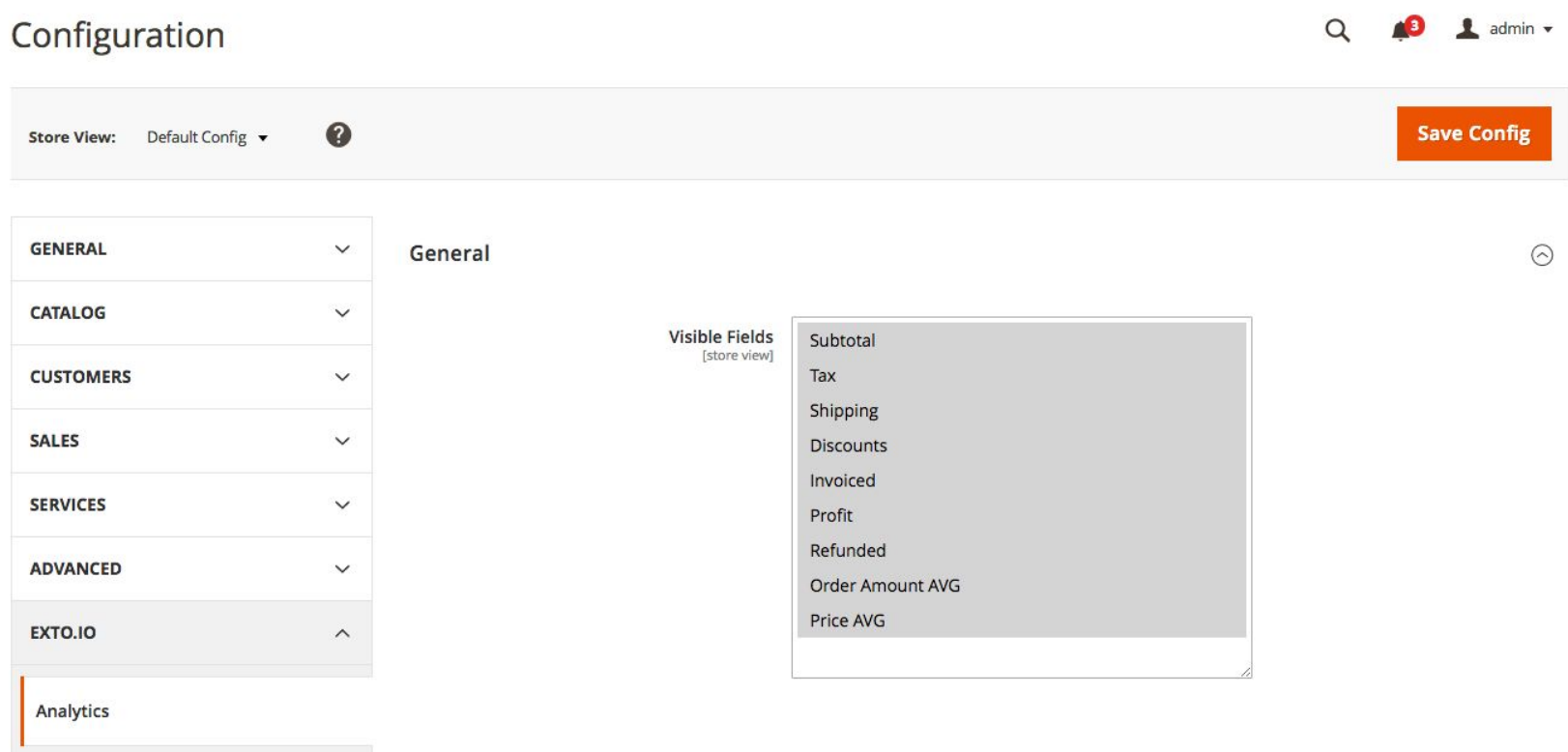


Image 2. Extension Visible Fields

Exto Analytics tables can have the following configurable columns:

- Subtotal
- Tax
- Shipping

- Discount;
- Invoiced
- Profit
- Refunded
- Order Amount AVG
- Price AVG

## 2. Reports Overview

### 2.1 Main Interface

EXTO Analytics is listed under are located under the **Reports** backend section:

[Reports](#) > [Exto Analytics](#)

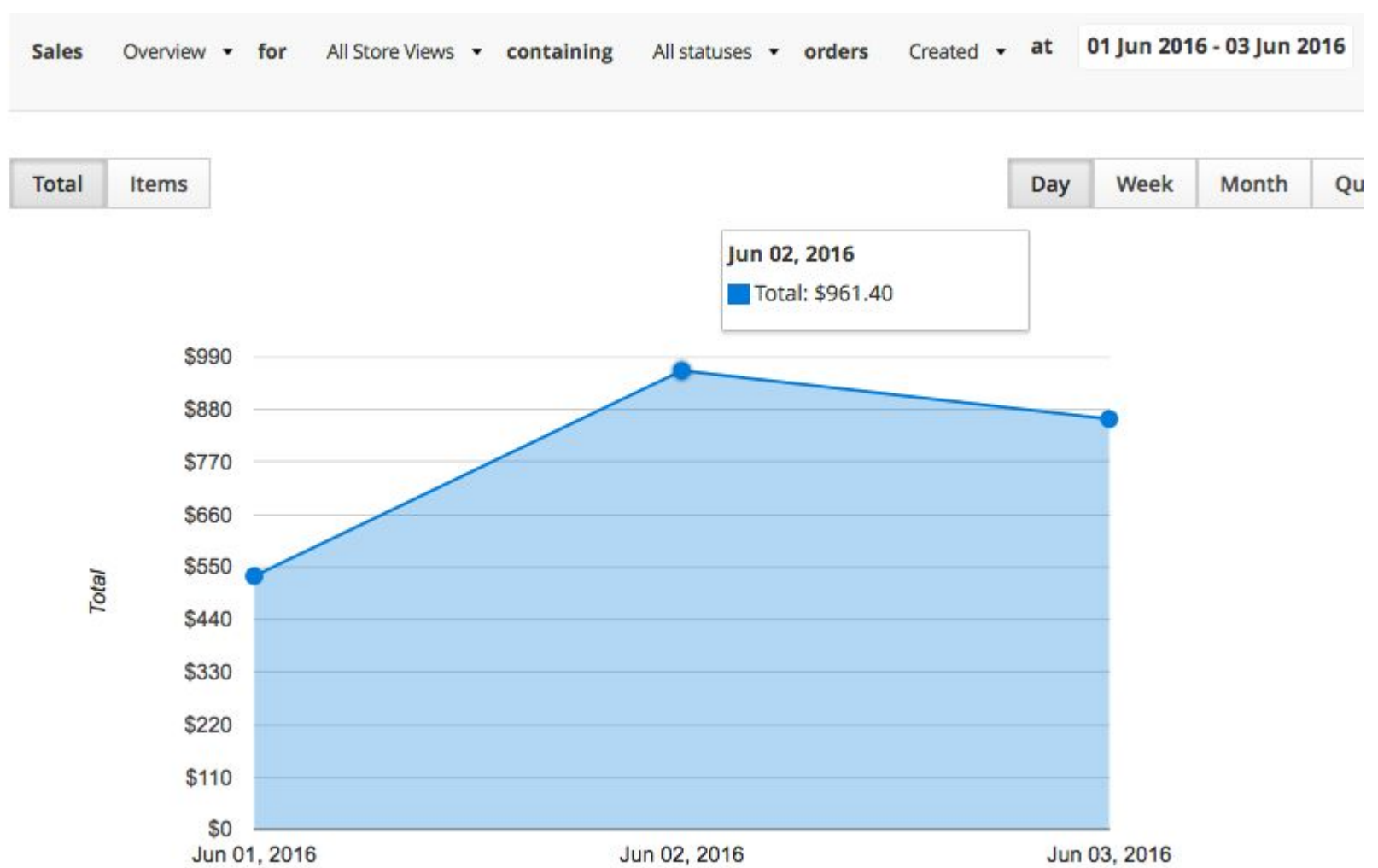


Image 3. Exto Analytics report

Once you access any of the reports, there are some common options:

- **Sorting Options** allow sorting the table by any column;
- **Expandable Calendar with date range and comparison** allows defining the report's date range;
- **Report Chart** visual representation of the data.

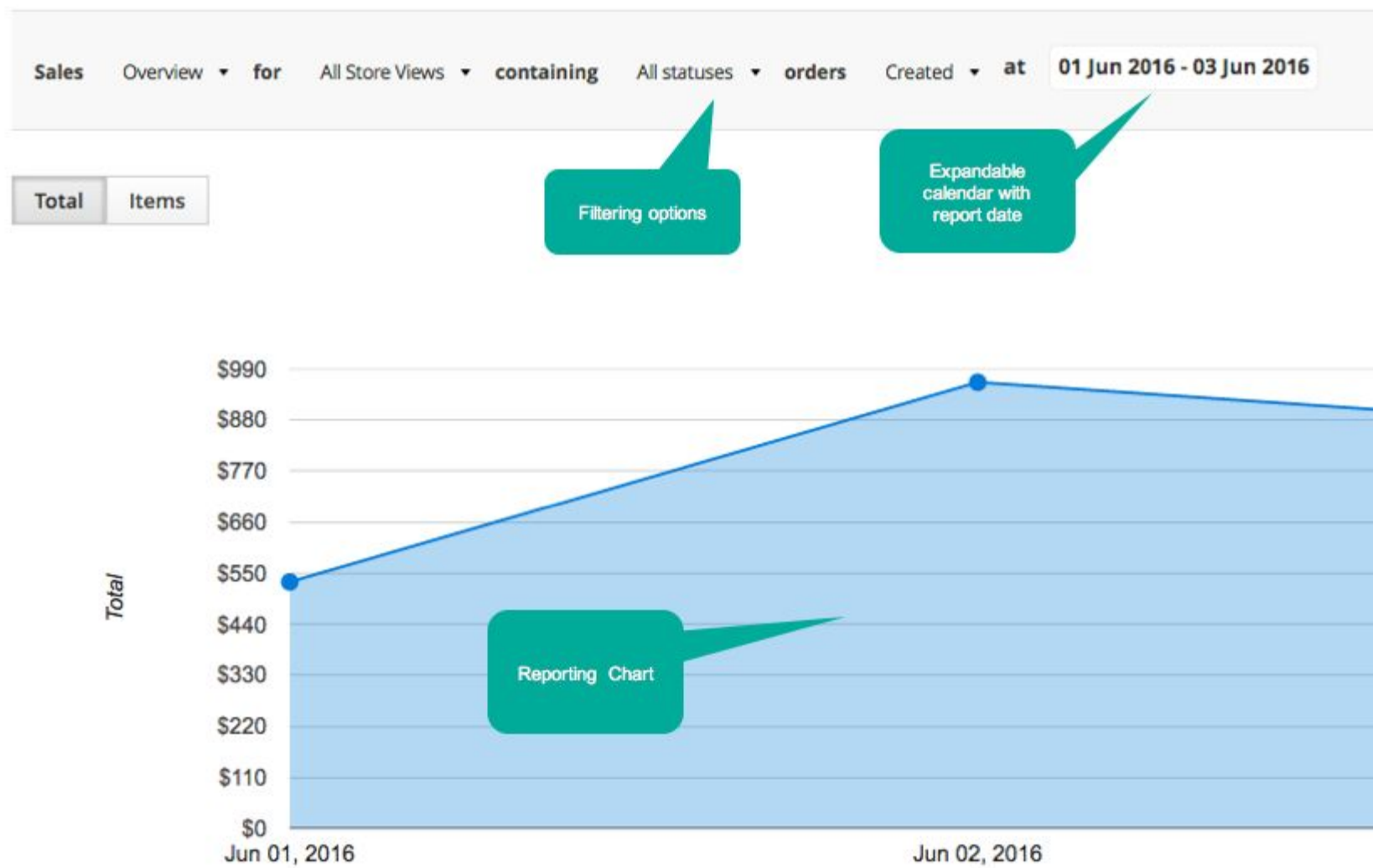


Image 4. Report Options

### Expandable Calendar

Expandable calendar allows setting up required report date range.

- **Month blocks** allow to select required dates by clicking on them
- **Date range** this section allows selecting either custom date range or predefined date ranges such as:
  - Today
  - Yesterday
  - Last Month
  - Last 7 Days
  - Last 30 Days
  - From / To - these fields allow adjusting selected date range(s) manually

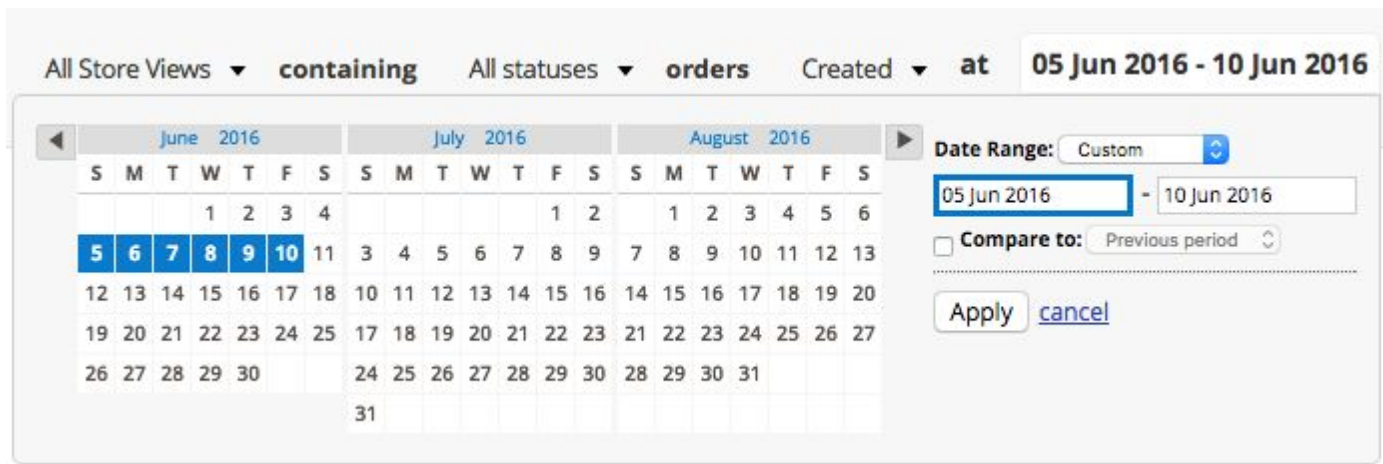


Image 5. Expandable Calendar

### Comparison

Compare allows to specify a comparison period. Both data periods with comparison calculation (where applicable) will be displayed. This section allows selecting either custom date range or predefined date ranges:

- **Previous period**
- **Previous year**

When a user changes the value of the period picker, the table is rebuilt and the graph reflects the change.

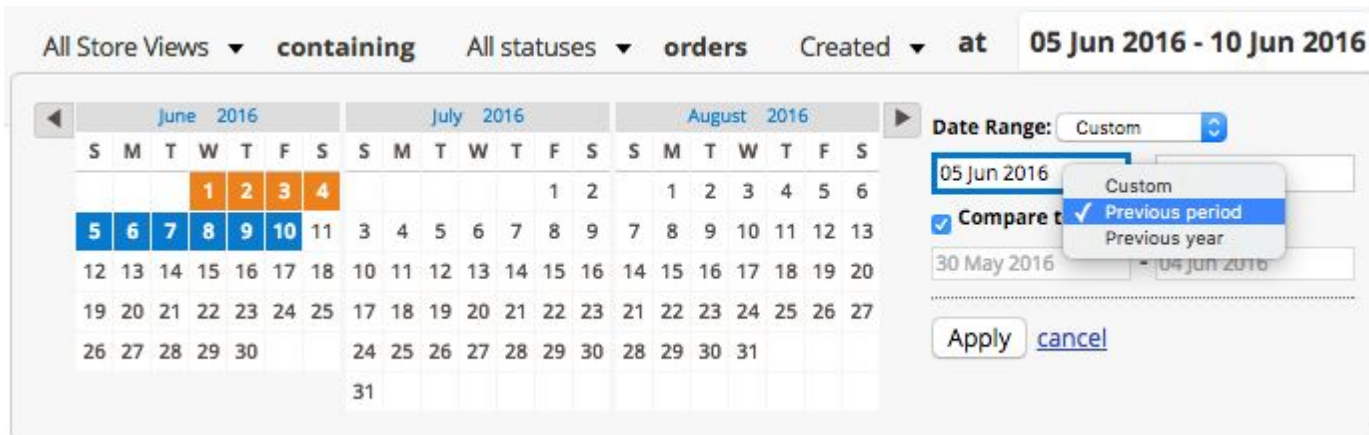


Image 6. Compare Section

### Granularity presets

Use the presets to find the most comfortable view to analyze your data. Day ( e.g. "Apr 01")

- **Week** ( e.g. "Apr 01 - Apr 07")
- **Month** ( e.g. "Apr 2016")
- **Quarter** ( e.g. "Q2 2016") **Year** ( e.g. "2016")

**Total / Items switch**

Upon clicking Total/Items you can switch the graph to the totals or items mode accordingly.

## 2.2 Report Types

Exto Analytics comes with three report types, each having a particular role in covering the most important aspects of the store productiveness.

### 2.2.1 Sales Overview

The Sales Overview report allows to monitor the net sales, average sales, discounts, shipping amount, returns, taxes etc. The data can be grouped by days, weeks, months, quarters and years. Also you can compare 2 time periods vs each other.

The following fields are available:

- Total
- Items qty
- Subtotal
- Tax amount
- Shipping amount
- Discounts amount
- Invoiced amount
- Refunded amount
- Order Amount AVG



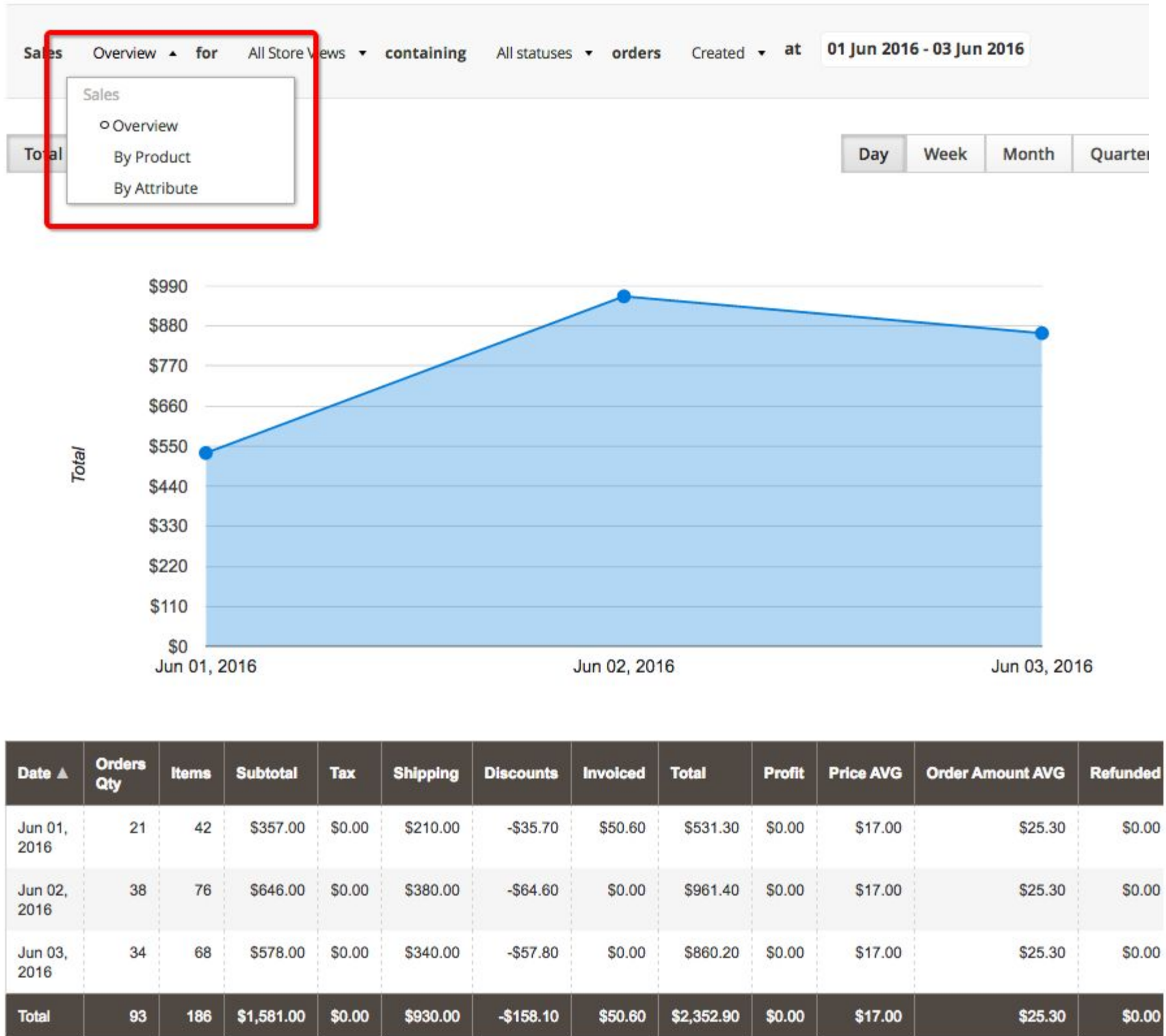


Image 7. Sales Overview Report including the report columns

### 2.2.2 Sales By Product

**Sales By Product** is a product specific report. By default it gives the list of bestsellers/worst sellers (depending on the ordering direction). It can also display the sales of any particular product found by SKU or product name for any period of time.

The product name advisor provides with suggestions as a product's SKU or name is being entered.

Image 7. The Filter Field

For example, we have the products with the following names: *Sprite Foam Yoga Brick*, *Yoga Adventure*, and *Luma Yoga for Life*.

If we enter: *Yoga* in the SKU field at the **Sales By Product** screen the name advisor will suggest applicable product names.

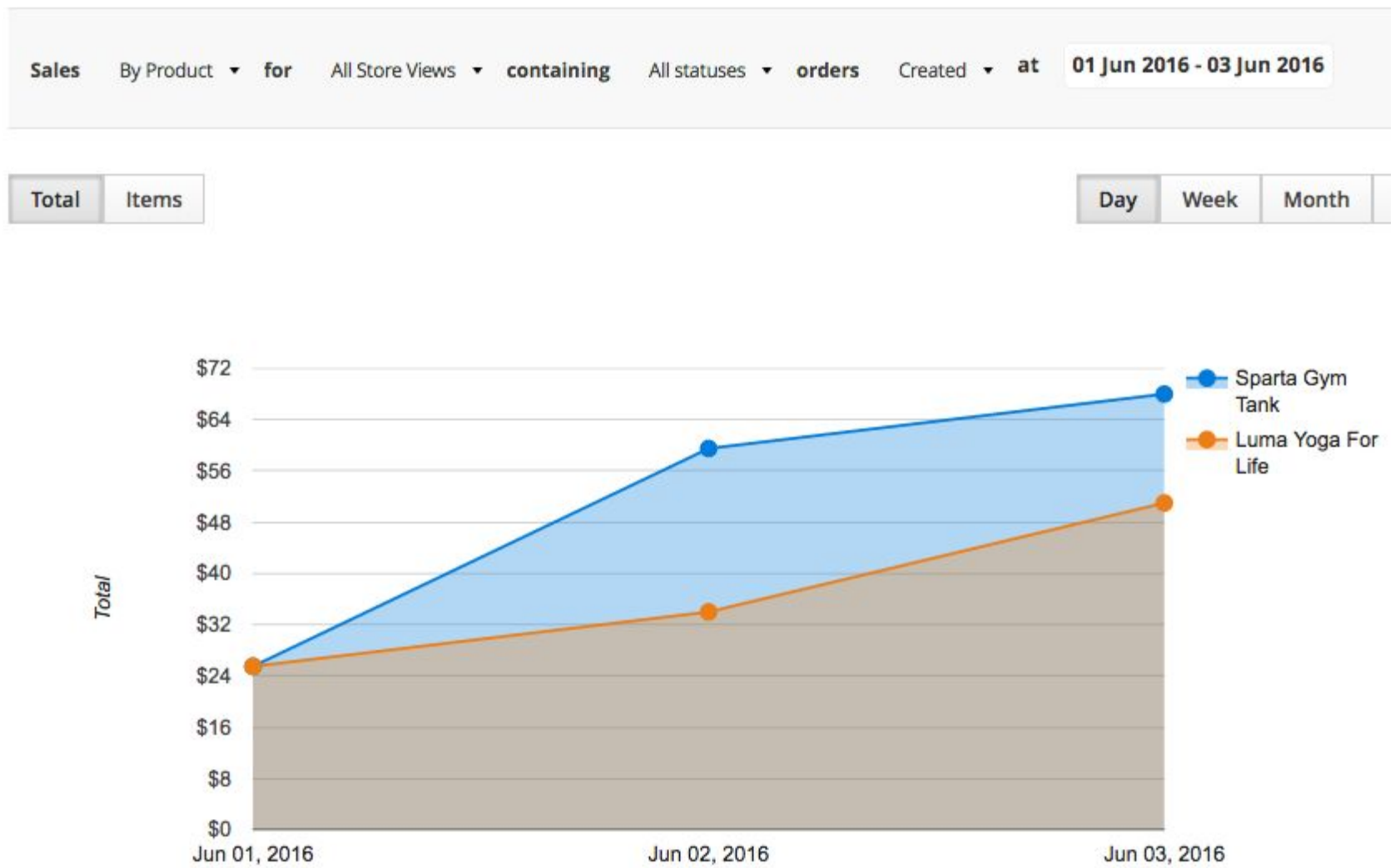


The screenshot shows a search input field with the placeholder text "Start entering product name or SKU...". Below the input field, a dropdown menu displays three suggestions: "Sprite Foam **Yoga** Brick", "**Yoga** Adventure", and "Luma **Yoga** For Life". To the right of the input field is a button labeled "Apply filter". Below the suggestions, there is a dark grey bar with the word "Total" and a downward-pointing triangle icon.

Image 8. Name Advisor

The report comes with the following columns:

- Product Sku
- Total quantity ordered
- Profit
- Subtotal
- Tax amount
- Discounts amount
- Invoiced amount
- Total
- Price AVG
- Refunded amount



Name	SKU	Total ▼	Items	Subtotal	Tax	Discounts	Invoiced	Profit	Price AVG	Refunded
Sparta Gym Tank	product_dynamic_18 (ID-18)	\$153.00	18	\$0.00	\$0.00	-\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Luma Yoga For Life	product_dynamic_15 (ID-15)	\$110.50	13	\$0.00	\$0.00	-\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>		<b>\$263.50</b>	<b>31</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>-\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

Image 9. Sales by Product including the report columns

### 2.2.3 Sales by Attribute

**Sales by Attribute** allows you to build sales reports basing on any product attribute, such as category, manufacturer, color, size or any other.

The report comes with the following columns:

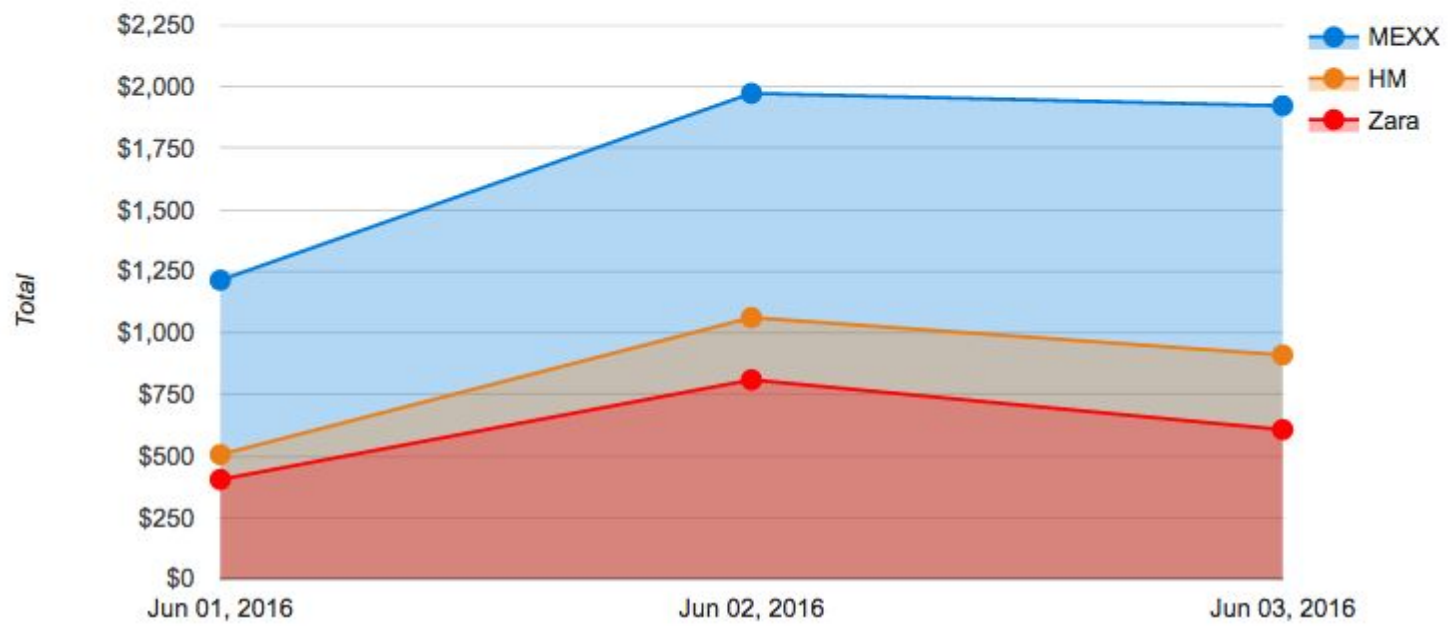
- Total quantity ordered
- Attribute
- Items
- Subtotal
- Tax amount

- Shipping amount
- Discounts amount
- Invoiced amount
- Total
- Order Amount AVG
- Refunded amount

Sales By Attribute ▼ for All Store Views ▼ containing All statuses ▼ orders Created ▼ at 01 Jun 2016 - 03 Jun 2016

Total Items

Day Week Month Quarter Year



Manufacturer ▼

Attribute	Items	Total ▼	Subtotal	Tax	Shipping	Discounts	Invoiced	Order Amount AVG	Refunded
MEXX (ID-8)	404	\$5,110.60	\$3,434.00	\$0.00	\$2,020.00	-\$343.40	\$202.40	\$75.90	\$0.00
HM (ID-6)	196	\$2,479.40	\$1,666.00	\$0.00	\$980.00	-\$166.60	\$0.00	\$75.90	\$0.00
Zara (ID-7)	144	\$1,821.60	\$1,224.00	\$0.00	\$720.00	-\$122.40	\$0.00	\$75.90	\$0.00
<b>Total</b>	<b>744</b>	<b>\$9,411.60</b>	<b>\$6,324.00</b>	<b>\$0.00</b>	<b>\$3,720.00</b>	<b>-\$632.40</b>	<b>\$202.40</b>	<b>\$25.30</b>	<b>\$0.00</b>

Image 10. Sales by Attribute including the report columns

### 3. Additional information

When period picker changes its value, report rebuilds the table and graphs to reflect the change. All the figures in line are summarized for defined period.

**NOTICE**

The periods may not match in length, e.g. compare a week against a month.

The graph would show 2 lines of different color instead of 1. The table would look like the following:

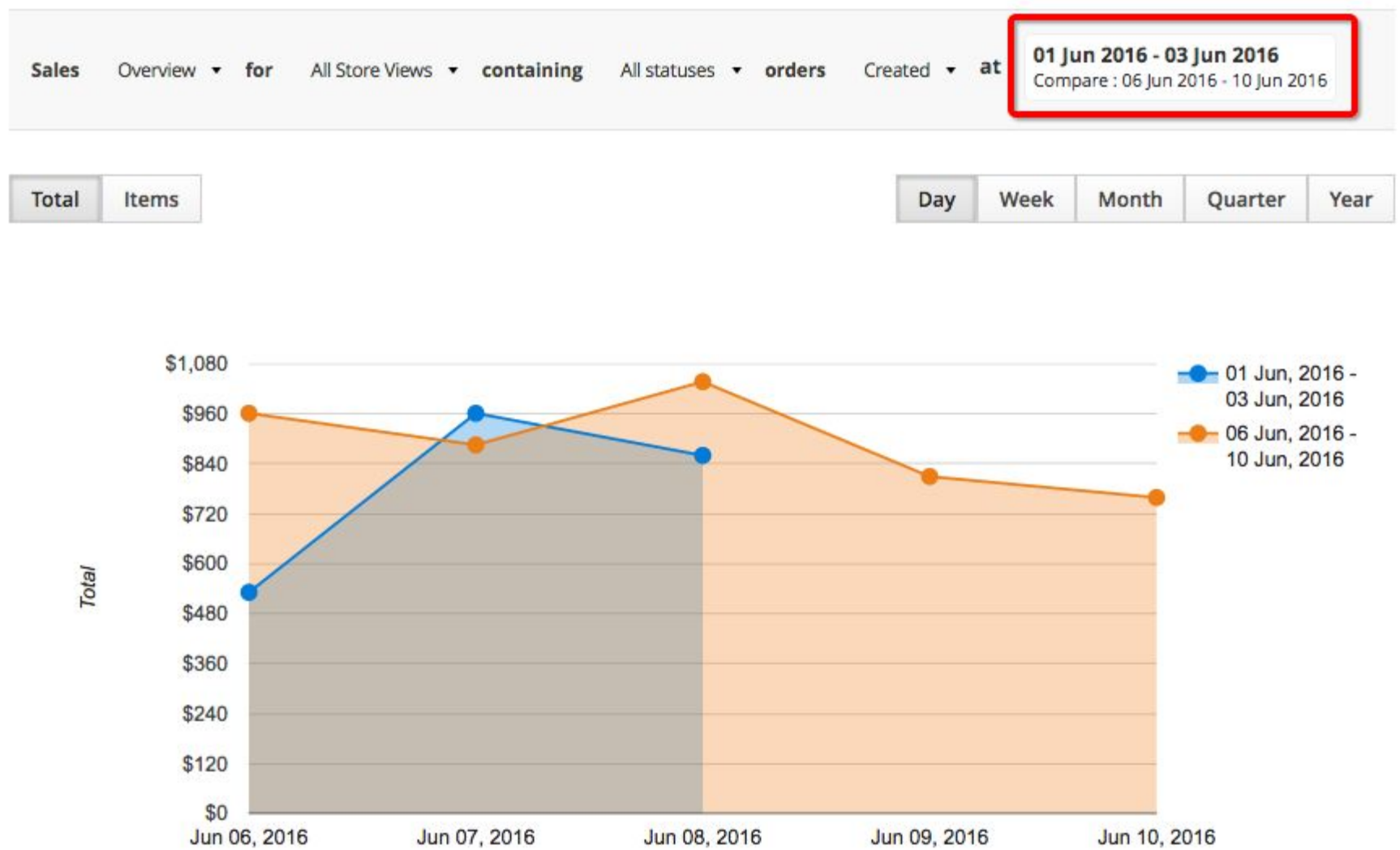


Image 11. Comparison of Periods

In the second row the graph displays totals for newer period vs older period, and percentage change of the totals. The information in the table is grouped into comparison pair, followed by summarizing percentage change, showing percent of change for each couple of periods.

Date	Orders Qty	Items	Subtotal	Tax	Shipping	Discounts	Invoiced	Total	Profit	Price AVG
	-47.16% (93 vs 176)	-47.16% (186 vs 352)	-47.16% (\$1,581.00 vs \$2,992.00)	(\$0.00 vs \$0.00)	-47.16% (\$930.00 vs \$1,760.00)	-47.16% (\$158.10 vs \$299.20)	-33.33% (\$50.60 vs \$75.90)	-47.16% (\$2,352.90 vs \$4,452.80)	(\$0.00 vs \$0.00)	0.00% (\$17.00 vs \$17.00)
1										
Jun 01, 2016	21	42	\$357.00	\$0.00	\$210.00	\$35.70	\$50.60	\$531.30	\$0.00	\$17.00
Jun 06, 2016	38	76	\$646.00	\$0.00	\$380.00	\$64.60	\$25.30	\$961.40	\$0.00	\$17.00
<b>% Change</b>	-44.74%	-44.74%	-44.74%		-44.74%	-44.74%	+100.00%	-44.74%		0.00%

Image 12. Information in the table including the report columns

Extension selects all orders matching main conditions and date range. If a user chooses comparison, the data is split into sets.

The profit is calculated according to the formula: **Price - Cost**

- **Price** - the price value is caught from the order details that are stored in the Magento database
- **Cost** - the cost value is caught from the order details

The **Price** value will always be order-relevant whereas cost will be always product-relevant, thus making the **Profit** values.

The **Profit** is calculated for the reports the next way:

**Profit** - represents flat difference between product price and product cost, it is calculated using the following formula:

$$\text{Total Profit (\$)} = \text{Total Price} - \text{Total Cost}$$