Welcome to the Advanced Reports Guide!

Here you will find everything you need to set up and use an Advanced Reports. Whether you are a new or an advanced user, you can find some useful information here.

The **Advanced Reports** Extension includes **Advanced Report**, **Advanced Reports**, and **Advanced Dashboard** modules.

First, please find your extension in your account in [My Downloadable Products] section. Then, start with [Installation] and [Quick Start] option. It is best to follow our step-by-step guide in order to configure the best search results.

Go ahead, dive in!

Learn about the initial setup:

- [Installation]
- [Quick Start]

Installation

In this article you will find two possible ways of our extension's installation.

Installation via composer (preferably)

We recommend this installation method because composer automatically checks and installs necessary dependencies.

1. Backup your store's database and web directory.
2. Login to the SSH console of your server and navigate to the root directory of the Magento 2 store.
3. Copy the installation instructions from the page [My Downloadable Products] / **View & Download** to the SSH console.
4. To enable the extension run commands:

   ```
   php -f bin/magento module:enable Mirasvit_Core Mirasvit_Report Mirasvit_Re
   php -f bin/magento setup:upgrade
   ```

5. Clean the cache

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

6. Deploy static view files

   ```
   rm -rf pub/static/*
   rm -rf var/view_preprocessed/*
   php -f bin/magento setup:static-content:deploy
   ```

Installation via direct file upload

You can also install the extension via direct files uploading.

1. Go to My Downloadable Products / **View & Download**.
2. Unpack .zip package and copy contents to magento root directory
3. Login to the SSH console of your server and navigate to the magento root directory.
4. To enable the extension run commands:

   ```
   php -f bin/magento module:enable Mirasvit_Core Mirasvit_Report Mirasvit_Re
   php -f bin/magento setup:upgrade
   ```

5. Clean the cache

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

6. Deploy static view files

   ```
   rm -rf pub/static/*
   rm -rf var/view_preprocessed/*
   php -f bin/magento setup:static-content:deploy
   ```

Learn about the initial setup:

- Quick Start

Quick Start

As you've successfully completed installation of Advanced Reports, we will guide you through the main steps required to start efficiently using our extension.

1. Please open and configure your first Advanced Dashboard (**Magento Main Menu** > **Dashboard** > **Advanced Dashboard**)
2. Please check the Reports (**Magento Main Menu** > **Reports** > **Advanced Reports)**

Reports

The module provides a wide range of reports using various tools to analyze and improve sales:

Reports Menu

Image not found or type unknown

- **Sales Overview**

General sales report. It allows you to see the number of orders, quantity of sold products, net sales, grand total, discounts, returns etc.

The report can contain about 40 columns.

You receive daily / weekly / monthly / quarterly / annual reports.

- **Orders**

The report describes the full information about store orders.

- **Sales By Hour**

Hourly sales report. You can detect the hours of which personnel of your shop is overloaded to the maximum extent. This will allow you to plan the working hours as well as perform possible updates in your shop.

- **Sales by Day of week**

Weekly sales report.

- **Sales by Customer**

The report about customer sale details at your store. Allows to see all required sale information about each customer: amount of orders, refunds, discounts, etc.

- **Sales by Customer Group**

The sales report generated over different user groups. Using such tool, you can determine the extent of work efficiency with different user groups.

- **Sales by Coupon**

The report allows you to gain knowledge regarding which coupons are the most favorable in terms of sales volume, and which ones should be elaborated in a better way.

- **Sales by Cart Price Rules**

The report shows the use of cart price rules

- **Sales by Tax Rate**

The report contains information on the distribution of orders at tax rates

- **Sales by Payment Type**

The report allows you to define the extent of popularity regarding different payment methods.

- **Sales by Geo-data**

The report that reflects sales volumes in different countries achieved during definite periods of time.

- **Sales by Category**

Sales Report by store product categories

- **New vs Returning Customers**

The report which allows you to make a comparative analysis of new customers (first order) with returning customers (two or more orders) by sales.

- **Product Performance**

The detailed information about each product sale history: number of orders (%), ordered qty, total amount of incomes, etc

- **Sales by Attribute**

Sales Report by store product attributes

- **Sales by Attribute Set**

Sales Report by store product attribute sets

- **Customers**

The report contains all general information and statistics about registered customers

- **Abandoned Carts Overview**

The report contains statistics on abandoned carts. Information can be grouped at different time intervals (day / week / month / quarter / year)

- **Abandoned Carts**

List of abandoned carts with information (date of the creating, customer, coupon (if applied), products)

- **Abandoned Products**

The detailed information about abandoned products. You will be able to identify the most frequently abandoned products

---

The module allows you to show reports for all websites and separately for each store view. You can analyze your product sales on the **Chart**. Add additional columns to compare next values:

- **Number of Orders** - number of product orders
- **Total Qty Ordered** - total amount of product orders
- **Qty Refunded** - total amount of refunded products
- **Discount Amount** - the amount of the discounts for a certain product
- **Shipping Amount** - the amount of money paid for Shipping
- **Shipping Tax Amount**
- **Tax Amount** - the amount of taxes paid for a certain product
- **Tax Refunded**
- **Total Refunded** - the amount of money refunded for a certain product
- **Subtotal** - the order value without shipping costs and taxes
- **Grand Total** - total amount of the sales revenue for a selected period
- **Total Invoiced**

- **Total Invoiced Cost**
- **Gross Margin**
- **Grand Total by new customers**
- **Grand Total by returning customers**
- **Grand Total excl. Tax**
- **Gross Profit**

The extension allows you to show reports for different **Store views**, vary report period, compare attributes and values.

Interface

Consider generic interface using example of ["Sales Overview" report](#).

Sales Overview

Image not found or type unknown

- **1**: ?alendar for the selection of the reporting period;
- **2**: Drop-down with pre-defined time intervals for Calendar **(1)**: `Today`, `Yesterday`, `This week`, `Previous week`, `This month`, `Previous month`, `This year`, `Previous year`, `Lifetime` (minus 10 years from the current moment, plus 10 years to the current moment), `Custom` (allows to select period manually).
- **3**: Currently selected time interval for the report.

Note

If **Compare To** is checked, Report will be displayed in **Comparison mode**.

- **4**, **5** - Drop-down with pre-defined comparison periods, and fields for custom comparison period definition.

  Example

  The example of a comparison

  Comparison Sales Overview

  Image not found or type unknown

- **6**: Selects scope of Report - either for **All Stores**, or only for particular one.
- **7**: Defines step size. Report can be dispayed for each **Day**, **Week**, **Month**, **Quarter** and **Year**.
- **8**: Filters data table with the filter, and correspondingly changes chart display. With these filters you can build a report for individual customer groups or taking into account the selected order statuses.

Example

Filters by Order Statuses o

Add to the columns list `Order Status`, `Customer Group`, `Days of week`. Image not found or type unknown Then
Report filters

use filters to adjust data table, and you will receive a Filtered Report. Image not found or type unknown

9: Defines Reports Presets (Time Interval, Columns, Filters). It allows you to save your Report setup, and view it next time with a single click.

10: Add / remove columns to a data table of the Report. Contains only **Active** columns, so if you wish to add some extended columns - you need to use **Settings** button first.

11: Export report in CSV or XML format.

12: Defines, which columns are **Active** (e. q. selectable in **Columns** for a data table) and available for displaying at the Dashboard. It can dramatically reduce time of report generation by excluding all unnecessary columns.

Settings (12) button brings up a Active Columns selection, where listed all columns, that can be displayed in current Report (including synthetic - e. q. that can be calculated on-the-fly - such as **Average Base Discount Amount**).

Reports Active Columns

Image not found or type unknown

Each row is a column activation definition, and contains:

- **Column Name** - sensical name of column.
- **Column Type** - type of column, e. q. numeric, money, text and so on.
- **Aggregator Type** - used for synthetic columns, and displays, which SQL function is actually used for calculation.

Each selected column is marked by green line, and became available both in **Columns** (11) popup, and in **[Dashboard Blocks]**.

Sales Overview report

General sales report. It allows you to see the number of orders, quantity of sold products, net sales, grand total, discounts, returns etc. You receive daily / weekly / monthly / quarterly / annual reports.

Sales Overview

Image not found or type unknown

Orders report

Orders Report

Image not found or type unknown

Sales by Hour report

Sales by Hour

Image not found or type unknown

Sales by Day of Week report

Sales by Day of Week

Image not found or type unknown

Sales by Customer report

Sales by Customer

Image not found or type unknown

Sales by Customer Group report

Sales by Customer Group

Image not found or type unknown

Sales by Coupon report

Sales by Coupon report

Image not found or type unknown

Sales by Cart Price Rule report

Sales by Cart Price Rule report

Image not found or type unknown

Sales by Tax Rates report

Sales by Tax Rates report

Image not found or type unknown

Sales by Payment Type report

Sales by Payment Type report

Image not found or type unknown

Sales by Geo-data report

Sales by Geo-data

Image not found or type unknown

Sales by Category report

Sales by Category report

Image not found or type unknown

New vs Returning Customers report

New vs Returning Customers

Image not found or type unknown

Product Performance report

Product Performance report

Image not found or type unknown

Sales by Attribute report

Sales by Attribute report

Image not found or type unknown

Sales by Attribute Set report

Sales by Attribute Set report

Image not found or type unknown

Customers report

Customers report

Image not found or type unknown

Note
In contrast, "Sales by Customer" report this report also contains registered customers without purchases

Abandoned Carts Overview report

Abandoned Carts Overview report

Image not found or type unknown

Abandoned Carts report

Abandoned Carts report

Image not found or type unknown

Abandoned Products report

Abandoned Carts report

Image not found or type unknown

Custom Reports

This section provides sample configurations for reports that can be built with the Report Builder tool.

- **Low Stock**

Low Stock

1. Low Stock report configuration

   Create the "Low Stock" report using the report builder: Image not found or type unknown Feel free to modify or add more columns to it if you need to display or filter data by other columns.
   After save, the report becomes available for view in the list of reports.

2. Create a new dashboard widget based on the "Low Stock" report created in a previous step. Using filters you can set up the quantity threshold and filter the data with other needed Low Stock widget configuration

   conditions, such as product status, category and so on: Image not found or type unknown

3. Low Stock email notification

   Set up a new email notification for the 'Low Stock' dashboard widget: Image not found or type unknown

Managing Dashboards

Our Advanced Reports extension allows you to have more than one Dashboards, suited for different purposes. They all are located at **Dashboard -> Advanced Dashboard** section as a part of menu:

Dashboard Menu

Image not found or type unknown

It is divided into three sections:

- **Top** section allows you quick access to dashboards, that you had created.
- **Middle** section provides you with basic actions, that can be done on currently opened Dashboard: **Edit** and **Delete**.
- **Bottom** section contains single action, which allows you to create new Dashboard

Creating New Dashboard

Visit **Dashboard -> Advanced Dashboard**, open menu and press **Add New Board** action. You will be brought to the dashboard creation page, which contains the following fields:

- **Title** - a sensical name of your Dashboard.
- **Type** - type of your new Dashboard. There are two different types:
  - **Private Board** will be available only for Admin users (e. q. with Administrator build-in Role).
  - **Shared Board** will be available for all backend users, defined in **System -> Permissions -> All Users**.
- **Is Default** - whether newly-created Dashboard will be shown immediately after log-in.
- **Enable Mobile Access** - whether newly-created Dashboard will be accessible in Mobile mode.

Note

This mode is very convenient for accessing dashboard data, but has some warranties:

- Dashboard widgets editing mode is disabled.
- Access to the mobile dashboard is granted according to the URL specified on the page and encrypted in the QR code. We recommend that you use any QR-reader on your mobile device to read such an URL.
- Dashboard URL itself is highly encoded to limit the ability to remember / copy URLs by an unauthorized person.

Please note that there is **no other suitable protection** for the mobile dashboard. If you don't sure, do not enable this option.

Press **Save** to create you new Dashboard.

This will create only a template for a Dashboard. To complete creation, you need to add one or more **Blocks** to your newly-created Dashboard Panel.

Managing Dashboards

Our Advanced Reports extension allows you to have more than one Dashboards, suited for different purposes. They all are located at **Dashboard -> Advanced Dashboard** section as a part of menu:

Dashboard Menu

Image not found or type unknown

It is divided into three sections:

- **Top** section allows you quick access to dashboards, that you had created.
- **Middle** section provides you with basic actions, that can be done on currently opened Dashboard: **Edit** and **Delete**.
- **Bottom** section contains single action, which allows you to create new Dashboard

Creating New Dashboard

Visit **Dashboard -> Advanced Dashboard**, open menu and press **Add New Board** action. You will be brought to the dashboard creation page, which contains the following fields:

- **Title** - a sensical name of your Dashboard.
- **Type** - type of your new Dashboard. There are two different types:
  - **Private Board** will be available only for Admin users (e. q. with Administrator build-in Role).
  - **Shared Board** will be available for all backend users, defined in **System -> Permissions -> All Users**.
- **Is Default** - whether newly-created Dashboard will be shown immediately after log-in.
-

Enable Mobile Access - whether newly-created Dashboard will be accessible in Mobile mode.

Note

This mode is very convenient for accessing dashboard data, but has some warranties:

- Dashboard widgets editing mode is disabled.
- Access to the mobile dashboard is granted according to the URL specified on the page and encrypted in the QR code. We recommend that you use any QR-reader on your mobile device to read such an URL.
- Dashboard URL itself is highly encoded to limit the ability to remember / copy URLs by an unauthorized person.

Please note that there is **no other suitable protection** for the mobile dashboard. If you don't sure, do not enable this option.

Press **Save** to create you new Dashboard.

This will create only a template for a Dashboard. To complete creation, you need to add one or more **Blocks** to your newly-created Dashboard Panel.

Adding Blocks to Dashboard

After Dashboard is created, you need to add there blocks. Open your newly-created Dashboard, and Dashboard Menu

press **View Mode** button, which is located in the right end of title ribbon: Image not found or type unknown It will bring you Dashboard Edit

to the Blocks Configuration mode, as shown below: Image not found or type unknown

To add a block, press **Add Block** button on the title ribbon. It will create an empty block rectangle, as you can see on screenshot above.

This block has four buttons on its bottom pane:

- **Move** - allows you to move block visually on marked zone. You can also resize block, if you wish - just drag and drop its right-botton corner.
- **Settings** - allows you to select data, which will be displayed on that block (read more below).
- **Refresh** - allows you to preview (or refresh) previewed data in Edit Mode.

  Note
  By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block either statistical data, or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

Metrics

Image not found or type unknown

As you see above, it contains of the following fields:

- **General Settings**
  - **Title** - a sensical title for a metric. It will be displayed as title of your block.
  - **Description** - short description of your block.
- **Visualization**
  - **Renderer** - defines view, in which data will be presented. There are two possible values:
    - **Single Value** - in this mode only first selected data field will be displayed.
    - **Table** - in this mode multiple fields can be displayed.

      Note

      Renderer also governs **Metrics** and **Reports** sections visibility.
- **Metrics** - defines data, used for calculations in current block. This section is shown, when **Single Value** renderer is selected.
  - **Data Source** - application, from which data should be extracted. For now it's only **Mirasvit Reports**.
  - **Data** - one or more fields (columns), which should be gathered and displayed. They will be explained below.
- **Reports** - defines report, which acts as base for current block. This section is shown, when **Table** renderer is selected.
  - **Report** - defines, which exactly Advanced shall be used.
  - **Columns** - allows you to select, which columns should be displayed. It does not affect **Conditions** - since they applied before block is rendered.

    Note

    In this field can be selected only columns, set as **Active** in corresponding Report. Read more about it **here**.
- **Time Range**
  - **Override Dashboard Time** - by enabling this option, you can fix your block on specific period. Otherwise, data on your block will be displayed according to date range, selected for current Dashboard.

    Note
    Blocks with overridden time ranges are marked with special icon at upper-right corner.

  - **Range** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, for which block should display data.
  - **Compare To** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, which shall be used for comparison.
- **Filter** - allows you to filter raw data, used by this block, with one or more filters. Read more about it **below**.

Depending on **Renderer** parameter, you can also set additional visualization options.

If **Renderer** is **Single Value**, two possible visualization option available:

- **Gauge** - is the speedometer-like arc, which can be used for indicating dangerous levels (for example, refund amount). It has the following additional parameters:
  - **Is Active** - activates additional Gauge visualization.
  - **Min** - minimal value (left "green" bound of arc).
  - **Max** - maximum value (right "red" bound of arc)
- **Spark Line** - is the curve line chart, which displays dynamic of selected value by dates. If you had selected **Compare To** option in **Time Range** section, there will be two curve outlines - one for current data, and second for comparison.
  - **Is Active** - activates additional Spark Line visualization.

Selecting Metrics Data

Selection of Metrics data is a little tricky. Field **Data** in Metrics Edit Pane contains all available fields in selected category. There are the following Categories:

- **Orders** - allows you to analyze orders.
- **Order Items** - allows you to analyze products, that was bought by customers.
- **Order Payments** - completed payments
- **Order Transactions** - transactions (e. q. all actions, such as invoicing or shipping), which performed on your orders.
- **Taxes** - extracted taxes for all actually paid orders
- **Order Addresses** - addresses, that used as billing or shipping in orders.
- **Quotes** - quotes, created by customers (includes abandoned).
- **Quote Items** - products, that customer placed to the quote.
- **Invoices** - invoices, created for your orders.
- **Postcodes** - postal codes, used in billing and shipping addresses (used, for example, to determine country ship disperse).
- **Customers** - your customers.
- **Customer Addresses** - addresses, that customers are using in their accounts.
- **Products** - your products.
- **Categories** - categories, where at least one product is assigned.

Each of this category contains a number of fields. There are four types of them:

- **Numerical fields** - can be used "as is", for example, IDs. There are two additional subtypes of numerical fields:
  - **Total [Field]** - calculates total value of the entire column.
  - **Average [Field]** - calculates average value of the entire column.
- **Group of [Field]** - non-numerical field, that can be used as filter.

Combine them to create a query, and block will display result, with automatic date clip.

Note

You can combine fields from different categories - but for some reports some fields will return empty data. For example, categories **Orders**, **Customers**, **Order Items** are compatible, while **Products** and **Customers** are not.

We recommend to use fields from the same Category - it is enough for most reports.

Example

If you need to calculate average total of all orders, and split they on status, you will need to select in **Data** two fields from category Order:

- **Group of Status**
- **Average Subtotal**

Metrics Selection

Image not found or type unknown

Properly configured, our dashboards should look, as in our demo:

- **Daily View dashboard**

  Daily View dashboard

  Image not found or type unknown

- **All in One dashboard**

  All in One dashboard

  Image not found or type unknown

Filtering Data

Each block contains a **Filter** section, available both at creation stage, and on block editing. It is a table, which contains zero or more conditions, applied to general data. selected at **Metrics** section.

Dashboard Filter

Image not found or type unknown

Each condition is represented by row with the following properties:

- **Column** - a raw data column, which is used for filtering. It can differ depending on Metrics data, but currently offer only numeric and text columns.
- **Operator** - is the comparison type. There are the following comparison operators available:
  - **Equal To** and **Not Equal To**
  - **Greater Than** and **Lesser Than**
  - **Equals of Greater Than** and **Equals of Lesser Than**
  - **Is One Of** and **Is Not One Of**
- **Value** - is the value, to which eligible raw data should fit. This field is **text-based**, so if you wish to

use **Is One of** operator, values shall be comma-separated.

- **Action** - contains a button for removing condition.

If **Table** was used as **Renderer** (in **Visualization** section), filter section also will feature three additional fields:

- **Sort By** - selects, which column shall be used for sorting.
- **Sort Direction** - defines, whether sorting should be **ASC** or **DESC**.
- **Limit** - defines, how many rows should be displayed in block.

Note

Warning: If you had selected more than one condition, data shall fit them all like they were combined with **AND** operator.

Adding Blocks to Dashboard

After Dashboard is created, you need to add there blocks. Open your newly-created Dashboard, and press

Dashboard Menu

View Mode button, which is located in the right end of title ribbon: Image not found or type unknown It will bring you to the Blocks

Dashboard Edit

Configuration mode, as shown below: Image not found or type unknown

To add a block, press **Add Block** button on the title ribbon. It will create an empty block rectangle, as you can see on screenshot above.

This block has four buttons on its bottom pane:

- **Move** - allows you to move block visually on marked zone. You can also resize block, if you wish - just drag and drop its right-botton corner.
- **Settings** - allows you to select data, which will be displayed on that block (read more below).
- **Refresh** - allows you to preview (or refresh) previewed data in Edit Mode.

  Note
  By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block either statistical data, or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

Metrics

Image not found or type unknown

As you see above, it contains of the following fields:

- **General Settings**
  - **Title -** a sensical title for a metric. It will be displayed as title of your block.
  - **Description** - short description of your block.
- **Visualization**
  - **Renderer** - defines view, in which data will be presented. There are two possible values:
    - **Single Value -** in this mode only first selected data field will be displayed.
    - **Table -** in this mode multiple fields can be displayed.

      Note

      Renderer also governs **Metrics** and **Reports** sections visibility.
- **Metrics** - defines data, used for calculations in current block. This section is shown, when **Single Value** renderer is selected.
  - **Data Source** - application, from which data should be extracted. For now it's only **Mirasvit Reports**.
  - **Data** - one or more fields (columns), which should be gathered and displayed. They will be explained below.
- **Reports** - defines report, which acts as base for current block. This section is shown, when **Table** renderer is selected.
  - **Report** - defines, which exactly Advanced shall be used.
  - **Columns** - allows you to select, which columns should be displayed. It does not affect **Conditions** - since they applied before block is rendered.

    Note

    In this field can be selected only columns, set as **Active** in corresponding Report. Read more about it **here**.
- **Time Range**
  - **Override Dashboard Time** - by enabling this option, you can fix your block on specific period. Otherwise, data on your block will be displayed according to date range, selected for current Dashboard.

    Note
    Blocks with overridden time ranges are marked with special icon at upper-right corner.

  - **Range** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, for which block should display data.
  - **Compare To** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, which shall be used for comparison.
- **Filter** - allows you to filter raw data, used by this block, with one or more filters. Read more about it **below**.

Depending on **Renderer** parameter, you can also set additional visualization options.

If **Renderer** is **Single Value**, two possible visualization option available:

- **Gauge** - is the speedometer-like arc, which can be used for indicating dangerous levels (for example, refund amount). It has the following additional parameters:
  - **Is Active** - activates additional Gauge visualization.
  - **Min** - minimal value (left "green" bound of arc).
  - **Max** - maximum value (right "red" bound of arc)
- **Spark Line** - is the curve line chart, which displays dynamic of selected value by dates. If you had

selected **Compare To** option in **Time Range** section, there will be two curve outlines - one for current data, and second for comparison.
    - **Is Active** - activates additional Spark Line visualization.

Selecting Metrics Data

Selection of Metrics data is a little tricky. Field **Data** in Metrics Edit Pane contains all available fields in selected category. There are the following Categories:

- **Orders** - allows you to analyze orders.
- **Order Items** - allows you to analyze products, that was bought by customers.
- **Order Payments** - completed payments
- **Order Transactions** - transactions (e. q. all actions, such as invoicing or shipping), which performed on your orders.
- **Taxes** - extracted taxes for all actually paid orders
- **Order Addresses** - addresses, that used as billing or shipping in orders.
- **Quotes** - quotes, created by customers (includes abandoned).
- **Quote Items** - products, that customer placed to the quote.
- **Invoices** - invoices, created for your orders.
- **Postcodes** - postal codes, used in billing and shipping addresses (used, for example, to determine country ship disperse).
- **Customers** - your customers.
- **Customer Addresses** - addresses, that customers are using in their accounts.
- **Products** - your products.
- **Categories** - categories, where at least one product is assigned.

Each of this category contains a number of fields. There are four types of them:

- **Numerical fields** - can be used "as is", for example, IDs. There are two additional subtypes of numerical fields:
    - **Total [Field]** - calculates total value of the entire column.
    - **Average [Field]** - calculates average value of the entire column.
- **Group of [Field]** - non-numerical field, that can be used as filter.

Combine them to create a query, and block will display result, with automatic date clip.

Note

You can combine fields from different categories - but for some reports some fields will return empty data. For example, categories **Orders**, **Customers**, **Order Items** are compatible, while **Products** and **Customers** are not.

We recommend to use fields from the same Category - it is enough for most reports.

Example

If you need to calculate average total of all orders, and split they on status, you will need to select in **Data** two fields from category Order:

- **Group of Status**

- Metricts Selection

  Average Subtotal Image not found or type unknown

Properly configured, our dashboards should look, as in our demo:

- **Daily View dashboard**

  Daily View dashboard

  Image not found or type unknown

- **All in One dashboard**

  All in One dashboard

  Image not found or type unknown

Filtering Data

Each block contains a **Filter** section, available both at creation stage, and on block editing. It is a table, which contains zero or more conditions, applied to general data. selected at **Metrics** section.

Dashboard Filter

Image not found or type unknown

Each condition is represented by row with the following properties:

- **Column** - a raw data column, which is used for filtering. It can differ depending on Metrics data, but currently offer only numeric and text columns.
- **Operator** - is the comparison type. There are the following comparison operators available:
  - **Equal To** and **Not Equal To**
  - **Greater Than** and **Lesser Than**
  - **Equals of Greater Than** and **Equals of Lesser Than**
  - **Is One Of** and **Is Not One Of**
- **Value** - is the value, to which eligible raw data should fit. This field is **text-based**, so if you wish to use **Is One of** operator, values shall be comma-separated.
- **Action** - contains a button for removing condition.

If **Table** was used as **Renderer** (in **Visualization** section), filter section also will feature three additional fields:

- **Sort By** - selects, which column shall be used for sorting.
- **Sort Direction** - defines, whether sorting should be **ASC** or **DESC**.
- **Limit** - defines, how many rows should be displayed in block.

Note

Warning: If you had selected more than one condition, data shall fit them all like they were combined with **AND** operator.

Adding Blocks to Dashboard

After Dashboard is created, you need to add there blocks. Open your newly-created Dashboard, and press Dashboard Menu

View Mode button, which is located in the right end of title ribbon: Image not found or type unknown It will bring you to the Blocks
Dashboard Edit

Configuration mode, as shown below: Image not found or type unknown

To add a block, press **Add Block** button on the title ribbon. It will create an empty block rectangle, as you can see on screenshot above.

This block has four buttons on its bottom pane:

- **Move** - allows you to move block visually on marked zone. You can also resize block, if you wish - just drag and drop its right-botton corner.
- **Settings** - allows you to select data, which will be displayed on that block (read more below).
- **Refresh** - allows you to preview (or refresh) previewed data in Edit Mode.

  Note
  By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block either statistical data, or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

Metrics

Image not found or type unknown

As you see above, it contains of the following fields:

- **General Settings**
  - **Title** - a sensical title for a metric. It will be displayed as title of your block.
  - **Description** - short description of your block.
- **Visualization**
  - **Renderer** - defines view, in which data will be presented. There are two possible values:
    - **Single Value** - in this mode only first selected data field will be displayed.
    - **Table** - in this mode multiple fields can be displayed.

Note

Renderer also governs **Metrics** and **Reports** sections visibility.

- **Metrics** - defines data, used for calculations in current block. This section is shown, when **Single Value** renderer is selected.
  - **Data Source** - application, from which data should be extracted. For now it's only **Mirasvit Reports**.
  - **Data** - one or more fields (columns), which should be gathered and displayed. They will be explained below.
- **Reports** - defines report, which acts as base for current block. This section is shown, when **Table** renderer is selected.
  - **Report** - defines, which exactly Advanced shall be used.
  - **Columns** - allows you to select, which columns should be displayed. It does not affect **Conditions** - since they applied before block is rendered.

    Note

    In this field can be selected only columns, set as **Active** in corresponding Report. Read more about it **here**.
- **Time Range**
  - **Override Dashboard Time** - by enabling this option, you can fix your block on specific period. Otherwise, data on your block will be displayed according to date range, selected for current Dashboard.

    Note
    Blocks with overridden time ranges are marked with special icon at upper-right corner.

  - **Range** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, for which block should display data.
  - **Compare To** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, which shall be used for comparison.
- **Filter** - allows you to filter raw data, used by this block, with one or more filters. Read more about it **below**.

Depending on **Renderer** parameter, you can also set additional visualization options.

If **Renderer** is **Single Value**, two possible visualization option available:

- **Gauge** - is the speedometer-like arc, which can be used for indicating dangerous levels (for example, refund amount). It has the following additional parameters:
  - **Is Active** - activates additional Gauge visualization.
  - **Min** - minimal value (left "green" bound of arc).
  - **Max** - maximum value (right "red" bound of arc)
- **Spark Line** - is the curve line chart, which displays dynamic of selected value by dates. If you had selected **Compare To** option in **Time Range** section, there will be two curve outlines - one for current data, and second for comparison.
  - **Is Active** - activates additional Spark Line visualization.

Selecting Metrics Data

Selection of Metrics data is a little tricky. Field **Data** in Metrics Edit Pane contains all available fields in selected category. There are the following Categories:

- **Orders** - allows you to analyze orders.
- **Order Items** - allows you to analyze products, that was bought by customers.
- **Order Payments** - completed payments
- **Order Transactions** - transactions (e. q. all actions, such as invoicing or shipping), which performed on your orders.
- **Taxes** - extracted taxes for all actually paid orders
- **Order Addresses** - addresses, that used as billing or shipping in orders.
- **Quotes** - quotes, created by customers (includes abandoned).
- **Quote Items** - products, that customer placed to the quote.
- **Invoices** - invoices, created for your orders.
- **Postcodes** - postal codes, used in billing and shipping addresses (used, for example, to determine country ship disperse).
- **Customers** - your customers.
- **Customer Addresses** - addresses, that customers are using in their accounts.
- **Products** - your products.
- **Categories** - categories, where at least one product is assigned.

Each of this category contains a number of fields. There are four types of them:

- **Numerical fields** - can be used "as is", for example, IDs. There are two additional subtypes of numerical fields:
  - **Total [Field]** - calculates total value of the entire column.
  - **Average [Field]** - calculates average value of the entire column.
- **Group of [Field]** - non-numerical field, that can be used as filter.

Combine them to create a query, and block will display result, with automatic date clip.

Note

You can combine fields from different categories - but for some reports some fields will return empty data. For example, categories **Orders**, **Customers**, **Order Items** are compatible, while **Products** and **Customers** are not.

We recommend to use fields from the same Category - it is enough for most reports.

Example

If you need to calculate average total of all orders, and split they on status, you will need to select in **Data** two fields from category Order:

- **Group of Status**
- **Average Subtotal**

Metrics Selection

Image not found or type unknown

Properly configured, our dashboards should look, as in our demo:

- **Daily View dashboard**

  Daily View dashboard

  Image not found or type unknown

- **All in One dashboard**

  All in One dashboard

  Image not found or type unknown

Filtering Data

Each block contains a **Filter** section, available both at creation stage, and on block editing. It is a table, which contains zero or more conditions, applied to general data. selected at **Metrics** section.

Dashboard Filter

Image not found or type unknown

Each condition is represented by row with the following properties:

- **Column** - a raw data column, which is used for filtering. It can differ depending on Metrics data, but currently offer only numeric and text columns.
- **Operator** - is the comparison type. There are the following comparison operators available:
  - **Equal To** and **Not Equal To**
  - **Greater Than** and **Lesser Than**
  - **Equals of Greater Than** and **Equals of Lesser Than**
  - **Is One Of** and **Is Not One Of**
- **Value** - is the value, to which eligible raw data should fit. This field is **text-based**, so if you wish to use **Is One of** operator, values shall be comma-separated.
- **Action** - contains a button for removing condition.

If **Table** was used as **Renderer** (in **Visualization** section), filter section also will feature three additional fields:

- **Sort By** - selects, which column shall be used for sorting.
- **Sort Direction** - defines, whether sorting should be **ASC** or **DESC**.
- **Limit** - defines, how many rows should be displayed in block.

Note

Warning: If you had selected more than one condition, data shall fit them all like they were combined with **AND** operator.

Email Notifications.

Our Advanced Report extension allows you to create rich reports and send them by email as annual documents.

You can create such an email-based reports from **Reports -> Advanced Reports -> Email Notifications**.

How to Create Email Notification

Jump to **Reports -> Advanced Reports -> Email Notifications** and press **Add New Email** button. You will be brought to Email Report creation page, which is divided into two subsections:

General information contains basic information about Email Report sending:

- Title - a sensical **internal** title of Email Report.
- Status - whether this Report is active and should be sent.
- Subject - subject for email, which enclose your Report.
- Recipient - comma-separated emails of persons, who should receive this Report.
- Schedule - text-based schedule for sending messages, which uses converted Cron notation. A useful manual on it can be found here.

  Example

  Send Email Report at 23:59 every day: Enter Text: `23:59 every day` Real schedule behing it: `59 23 * * *`

Body contains one or more rows, each of which contains a block with extracted and processed data about your store's work. Each row has the following parameters:

- **Block** - is the name of real Report or Dashboard block, which contains collected data.
- **Date Interval** - you can use this field to override default block data range, and force collect data for certain period. Leave empty, if you need to insert report or block as is.
- **Rows limit** - limit of records, processed while collecting data. Used primarily to resolve performance issue (too much data to process can make email sending stuck). Leave empty to process all data.

Body can contain any number of Reports or Dashboard blocks, therefore, you can automate your reporting even in single email.

Geo data Management

Geo data Management

Image not found or type unknown

Here you can import prepared Geo data for certain countries

Choose countries

Image not found or type unknown

Report Builder

Report Builder is a unique tool, which allows you to create your own reports, and even define dynamic columns.

It consists of two different components:

- Report Builder - allows you to define Reports.
- Config Builder - allows you to add to the tables, listed in Report Builder, new dynamic columns with complex calculations.

Building Reports

Report Builder is located at **Reports -> Report Builder** section. Its top menu breaks into two columns:

- **Report Builder** - lists all reports, defined here, and an action to create a new one.
- **Config Builder** - lists all configs, with defined dynamic columns, and also an action to create a new one. Read more about it here.

Here is also displayed Reports Grid, which also lists all defined here Reports.

You can edit previously defined Report just by clicking on corresponding title either at the Grid or on of Report Builder menu, or create new one, by pressing **Build New Report** action.

Proceed now with Quick Guide, or jump to **In-Depth Guide**. You can also check **Short FAQ** about most common issues.

Quick Guide for creating Report with Report Builder

Visit **Reports -> Report Builder**. Press button **Build New Report**. You will see a workspace, like shown on screenshot below:

Report builder

Image not found or type unknown

To create a custom Report, you will need at least: *table name, dimension, data columns* and a *group column*.

- Select a table in **Tables** list. This will be the main table, which holds information you need. ?lick to copy name to the clipboard, and paste it to **Table** field (use `ctrl[CMD] + v` shortcut to insert value).
- Select a column in **Columns** list. This property contains data you need to put to the chart. ?lick to copy name to the clipboard, and paste it to **Default Columns** field. It should look like this: `sales_order|created_at`. Repeat action, if you need more fields to analyze.

  Note

  There are a number of additional fields with a mostly used functions. If field is numeric, our extension automatically generates two additional ones - with **count**, **average** and **total** calculations.

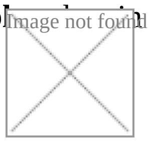
For example, if field is `grand_total`, then additional fields would be `grand_total_cnt`, `grand_total_avg` and `grand_total_sum`.
- Select an additional column with ID and additional function `cnt`. It will act as a grouping parameter and allows to calculate number of records, based on previously selected field(s). ?lick to copy name to the clipboard, and add it to **Default Columns** field.
- Copy your data fields also to the **Available Dimensions**. This field defines grouping columns, that chart can have.
- Copy contents of **Default Columns** to **Visible Chart Columns**. This field defines data table for building charts.
- Give report a sensical name, and put it to **Title** field.
- Press **Save and Build Report** to save it.

After saving, this report is available from top menu at **Reports -> Advanced Reports** section.

If you wish to delve into deep of Report Builder possibilities, proceed to [In-Depth Guide](#).

Short FAQ

- **How can I add a product attribute to my report**

  The attributes are located under the table **catalog_product_entity**. Thus, to add an attribute choose the table **catalog_product_entity** at the **Tables**, then in the **Columns** search for the required attribute, choose it and paste to the **Default Columns**. 

- **Report Totals not shown**

  Please note, totals are shown only for columns with suffixes **__sum**, **__avg**, **__concat** and only for relations of type **11** or **1n**.

Synthetic Columns Config Builder

Sometimes for Report you need a special column, that can be calculated from existing fields.

Our extension provides you with Config Builder. It is a tool, which allows you to define so-called **Synthetic Fields**. They will be added to **Database View** section and will act as a normal column, except of actually being calculated on-the-fly.

It is located at **Reports -> Config Builder**, and has similar menu interface, as in Report Builder - divided into two columns. Here is also displayed Config Grid, which also lists all defined here synthetic fields.

Quick Summary:

- [How to create Synthetic Field Column Config](#)
- [How to adjust relations between tables](#)

How to create Synthetic Field Column Config

Open either Report Builder or Config Builder menu, and select at right menu section **Add New Config** action. You will be brought to the Config Workspace:

Config

Image not found or type unknown

It is very simple, and contains the following fields:

- **Title** - sensical name of your new synthetic field (can be named as you wish).
- **XML Config** - column definition as XML document.

Example

Quick Example of Synthetic Field Config It defines new synthetic field, which on-the-fly calculates Gross Profit, based in actually invoiced orders.

```
<config>
    <table name="sales_order" group="Sales" label="Orders">
        <column name="custom_gross_profit" label="Custom Gross Profit"
                fields="base_subtotal_invoiced,base_total_invoiced_cost,base_t
                expr="(%1 - IFNULL(%2, 0) - IFNULL(%3, 0)) * %4" />
    </table></config>
```

Here is how this config built:

- **config** - is the **document element**, e. q. all other tags should be contained inside it.
- **table** - defines a table, where new synthetic field should be added
    - **name** - name of that table, which should be given **without** your table prefix. So, if you have in your database prefix `mage_` and real table name `mage_sales_order`, you need to enter here just `sales_order`.
    - **group** - name of a group, under which this table appears in the Report Builder. Default values: **Sales**, **Products**, **Customers**, **Categories**, **Other**. Tables without explicitly set group - fall into the **Other** group.
    - **label** - label of a table, used to identify a table.
- **column** - defines, how column should be calculated
    - **name** - unique name of the column, MySQL-compatible.
    - **label** - sensical name, which will be displayed in Report.
    - **type** - data type for displayed value. Supported are: **money**, **country**, **date**, **qty**, **number**, **select** , **percent**, **store**, **str**.
    - **fields** - comma-separated list of fields, which will be used in calculations.
    - **expr** - this attribute contains MySQL expression to calculate field value. You can use placeholders, where `%1` corresponds to the first field in previous attribute, `%2` - to second and so on.
    - **options** - non-mandatory attribute, when data type **select** or **country** is used. Here you need to enter full name of a class, which implements method `toOptionArray` for this column.

After config is created, your column **custom_gross_profit** will appear in the field **Columns** in corresponding section of **Database View Pane** of Report Builder.

How to adjust relations between tables

In order to build a report based on multiple tables the module should determine how to connect different tables together.
This connection between two or more tables is called **table relationship**.
Using config builder you can explicitly set what type of relation the module should use to connect two tables.
Below is an example of building the relationship between **sales_order** and **sales_order_item** tables.

Example

```
<config>
    <relation name="sales_order-sales_order_item" type="n1">
    <leftTable>sales_order</leftTable>
    <rightTable>sales_order_item</rightTable>
    <condition>%1.entity_id=%2.order_id AND %2.parent_item_id IS NULL</con
  </relation>    </config>
```

Report Builder In-Depth Guide

Visit **Reports -> Report Builder** and try to create a New Report.

Builder workspace consists of two panels:

- **Report Definition Pane** - located to the right, and contains all parameters, from which Report is built
- **Database View Pane** - located at the center of the page, and allows you to pick up tables and columns for your Report.

Working with Database View

The most important part is **Database View Pane**, it reflects all data, that exist in your store, distributed between three lists.

Report Builder Database View

Image not found or type unknown

Database View Pane contains three large lists:

- **Tables** - list of all tables, available for reporting.

  Note
  Sometimes right after installation not all the tables are available. Just manually clear the cache to resolve this issue.

-

Columns - list of all columns, available for reporting in currently selected Table. Each column is marked by two colored tags **- Type** (yellow) and **Function** (red). Each type has its own associated functions. Expand sections below to see them:

- **PK/FK** - marks Primary Key or Foreign Key of a table, in fact it is a numeric value.
  - **None** - marks original field.
  - **Count** - calculates quantity of records in the given table. If some other columns are selected, returns quantity of each their combination.
- **Number/Percent/Money** - basic numeric type.
  - **None** - marks original field.
  - **Avg** - contains calculated average value
  - **Sum** - contains calculated total value of all records by current column.
- **Str** - regular string, typically used as filter.
  - **None** - marks original field.
  - **Concat** - contains all unique values of this column, concatenated to one long string. Typically used for subordinate tables in complex Reports.
- **Html** - HTML string.
  - **None** - marks original field.
  - **Concat** - contains all unique values of this column, concatenated to one long string. Typically used for subordinate tables in complex Reports.
- **Select** - enumeration value, equal to string, but consisted with a pre-defined set of values.
  - **None** - marks original field.
  - **Concat** - contains all unique values of this column, concatenated to one long string. Typically used for subordinate tables in complex Reports.
- **Country** - two-letter code of the country.
  - **None** - marks original field.

        - **Concat** - contains all unique values of this column, concatenated to one long string. Typically used for subordinate tables in complex Reports.

    - **Date** - a MySQL-formatted date.

        - **None** - marks original field.

      Note
      Each of dynamic fields below extract its respective date part.

        - **Day**
        - **Day of Week**
        - **Week**
        - **Month**
        - **Quarter**
        - **Year**

- **Relations** - list of tables, that are related to current one. Primarily, it acts as a helper, which tables can be combined to obtain complex Report. Each row in this list contains:

    - **Name of connected table**
    - **Relation Tag** - yellow tag, which indicates type of relationship:
        - **n1** - is a N:1 relationship, i. e. multiple records from current are connected with one from related.
        - **1n** - is a 1:N relationship, i. e. one record from current is connected with multiple ones from related.

          Note

          If you need to insert to report data from table with 1:N relation, it's better to use functions - such as **sum**, **avg** and **cnt**.
    - **Foreign Key** - indicates, via which field relation is established.

Working with Report Definition Pane

Report Definition Pane actually defines your Report, and acts as a helper tool, which allows you to correctly pick up data.

Let us create a custom Report, which will collect data on subscribers of your store, and present it as a integrated Report with different views.

Warning: This example is built using **Mirasvit Push Notifications** extension.

- **Table** - it is the main table, which contains data for Report. It should be fully qualified, **without prefix**, as it defined in your Database. Use for that **Tables** list from Database View.

Example

Since we need to analyze store subscribers, then Table field should contain `mst_push_notification_subscriber` name.

- **Chart Type** - type of data visualization. Currently three possible options available:
  - **Column** - classic box graph visualization.
  - **Pie** - round-section graph visualization.
  - **Line** - curve line graph.
- **Default Dimension** - is the field, which will be used as grouping value in your Report graph.

  Example

  For our example, the most frequently used parameter will be **Device Type**, so this field will contain `mst_push_notification_subscriber|device_type`.
- **Default Columns** - are fields, that contain fields, that will form data table under the chart.

  Example

  Since we need to create integral report on Subscribers, this field should contain fields:
  - `mst_push_notification_subscriber|browser_name`
  - `mst_push_notification_subscriber|country`
  - `mst_push_notification_subscriber|ip`
  - `mst_push_notification_subscriber|operation_system`
  - `mst_push_notification_subscriber|device_type`
  - `mst_push_notification_subscriber|subscriber_id__cnt`

  Note the last field - it will act as main grouping parameter, which will show quantity of selected data.
- **Fast Filters** - are fields, that can be used for quick filtering data in Report from top ribbon.

  Example

  If you wish to additionally filter already displayed data for OS Type, for example, this field should contain `mst_push_notification_subscriber|operation_system`.
- **Available Filters** - are fields, that can be used as general filters from data grid. Typically it shall be identical to previous one.
- **Available Dimensions** - are columns, which act as views, that your Report will have. There should be entered all possible views, excluding listed as **Filters** above.

  Example

  For our integral Report we need separate view by Browser Name, Country, IP, Operation System and Device Type. So this field should contain:
  - `mst_push_notification_subscriber|browser_name`
  - `mst_push_notification_subscriber|country`
  - `mst_push_notification_subscriber|ip`
  - `mst_push_notification_subscriber|operation_system`
  - `mst_push_notification_subscriber|device_type`

- **Visible Chart Columns** - are fields, that should be displayed at the data grid. Typically shall be identical to previous one, and here also can be fields from **Default Columns**.

- **View Full Example**
    - **Title**: `Subscribers Statistics Report`
    - **Table**: `mst_push_notification_subscriber`
    - **Chart Type**: Pie
    - **Default Dimension**: `mst_push_notification_subscriber|device_type`
    - **Default Columns**:
        - `mst_push_notification_subscriber|browser_name`
        - `mst_push_notification_subscriber|country`
        - `mst_push_notification_subscriber|ip`
        - `mst_push_notification_subscriber|operation_system`
        - `mst_push_notification_subscriber|device_type`
        - `mst_push_notification_subscriber|subscriber_id__cnt`
    - **Available Dimensions**:
        - `mst_push_notification_subscriber|browser_name`
        - `mst_push_notification_subscriber|country`
        - `mst_push_notification_subscriber|ip`
        - `mst_push_notification_subscriber|operation_system`
        - `mst_push_notification_subscriber|device_type`
    - **Visible Chart Columns**:
        - `mst_push_notification_subscriber|browser_name`
        - `mst_push_notification_subscriber|country`
        - `mst_push_notification_subscriber|ip`
        - `mst_push_notification_subscriber|operation_system`
        - `mst_push_notification_subscriber|device_type`
        - `mst_push_notification_subscriber|subscriber_id__cnt`

  Subscribers Example

  Image not found or type unknown

Troubleshoot

This section describes the most common problems, that customers report, and how they can be resolved:

- [Do not want the Advanced Dashboard to be the default startup page]
- [No valid keys error]
- [How can I translate columns' labels]
- [State, province or place is not highlighted on a map in the Sales by Geo-data report]

Do not want the Advanced Dashboard to be the default startup page

After module installation the **Advanced Dashboard** page is becoming a default startup page at the admin panel area.

Solution:

You simply need to change the startup page in the admin panel settings.
For this navigate to the **Stores > Settings > Configuration > Advanced > Admin** and change the startup page. For more information please refer to the official Magento documentation.

No valid keys error

The error **No valid keys** may appear in the logs or in the cron_schedule table as the message for the job_code **reports_postcode_update**.
Our module, Mirasvit Reports, uses the Google Maps API to download the detailed information of the postcodes specified in the orders, to make it possible to view the "Sales by Geo-data" report.
This process gets executed once an hour and only by cron (in the background).

To access Google Maps API we provide keys with the extension, the keys have a daily quote, by the time when the quote is expired our module shows this message. So it actually even not an error, it just tells that today's quote for the keys has expired and will be restored tomorrow.
So you can simply ignore this error.

How can I translate columns' labels

The columns' titles are created dynamically, based on the tables field's names of your database. To translate them you need to use the column name:

```
"Orders","Orders"
```

Some of the names, do not actually contain the "Total" or "Average" keywords, so you should translate them without "Total" or "Average" keywords (columns with aggregator **sum** and **avg** correspondingly).
To translate "Total" and "Average" keywords you can use the following strings:

```
"Average %1", "Average %1"
"Total %1", "Total %1"
```

State, province or place is not highlighted on a map in the Sales by Geo-data report

In some cases a row with a country's state (province or place) is displayed in the grid of a report, however, the corresponding part of a map is not highlighted.

Solution:

Google, in its documentation, states that a region code should be written in uppercase ISO-3166-2 compliant format. For example, for Germany, in order to highlight the state we can use either its **Subdivision Name** (Bayern) or a corresponding **Code** (DE-BY).

For states our module uses the subdivision names, however, the practice proves, that not all the correctly formed subdivision names are always visible on a map. So, if it's true for you, you just need to use the appropriate **Code** instead.

To change the subdivision name to code you can simply use the Magento translation mechanism, you can place the string below to your theme's translation file (in admin panel):

```
"Bayern", "DE-BY"
```

Then clean the translation cache `php bin/magento cache:clean translate` and refresh the report.

How to upgrade the extension

To upgrade the extension follow these steps:

1. Backup your store's database and web directory.
2. Login to the SSH console of your server and navigate to the root directory of the Magento 2 store.
3. Run command `composer require mirasvit/module-reports:* --update-with-dependencies` to update current extension with all dependencies.

   Note

   In some cases the command above is not applicable, it's not possible to update just current module, or you just need to upgrade all Mirasvit modules in a bundle. In this case command above will have no effect.

   Run instead `composer update mirasvit/*` command. It will update all Mirasvit modules, installed on your store.

4. Run command `php -f bin/magento setup:upgrade` to install updates.
5. Run command `php -f bin/magento cache:clean` to clean the cache.
6. Deploy static view files

   ```
   rm -rf pub/static/*; rm -rf var/view_preprocessed/*; php -f
   bin/magento setup:static-content:deploy
   ```

Disabling Extension

Temporarily Disable

To temporarily disable the extension please follow these steps:

1. Login to the SSH console on your server and navigate to the root directory of the Magento 2 store.
2. Run command `php -f bin/magento module:disable Mirasvit_Report Mirasvit_Reports Mirasvit_Dashboard` to disable the extension.

   Note

   Please check or you have other Mirasvit modules that can build reports. If you have such modules please use this command: `php -f bin/magento module:disable Mirasvit_Reports Mirasvit_Dashboard`
3. Login in to the Magento back-end and refresh the store cache (if enabled).

Extension Removal

To uninstall the extension please follow these steps:

1. Login to the SSH console on your server and navigate to the root directory of the Magento 2 store.
2. Run the command `composer remove mirasvit/module-reports` to remove the extension.
3. Login to the Magento back-end and refresh the store cache (if enabled).

Change Log

1.3.25

(2018-11-29)

Improvements

- Major changes in UI

Fixed

- Compatibility with Magento 2.3

1.3.24

(2018-10-26)

Fixed

- 'This report no longer exists' error after saving report settings

---

1.3.23

(2018-10-12)

Fixed

- Sales by attribute shows zero totals for some attributes

Documentation

- new table attribute 'group'

1.3.22

(2018-10-02)

Fixed

- Catalog Attribute report shows wrong values (affects since 1.3.21)

1.3.21

(2018-09-28)

Fixed

- Sales by Attribute report shows 0 for simple items grouped by configurable attributes
- Do not display 'View Customer' action in Abandoned Carts report for records without registered customer

---

1.3.20

(2018-09-17)

Fixed

- Abandoned Products report does not properly show data

1.3.19

(2018-09-04)

Improvements

- Add order increment IDs column to product detailed report
- Add Order Payment columns to Sales Overview report

Fixed

- Show number of unknown postcodes in community edition
- Correct link to mst_report.xml schema validation file

Documentation

- How to create Low Stock report, widget and email notification

---

1.3.18

(2018-08-13)

Improvements

- Add order items columns to Product Performance report
- Use shipping address state for Geo report as the fallback, if state has not been downloaded

Documentation

- Troubleshoot for case when region part is not highlighted on a map in the Sales by Geo-data report

---

1.3.17

(2018-08-10)

Improvements

- Do not log 'No valid keys' error
- Use free daily quote instead of keys for downloading info about unknown postcodes

Documentation

- How to build table relationship using Config Builder tool
- How to translate column's names

1.3.16

(2018-08-03)

Improvements

- Add Order Item columns to Sales reports

Documentation

- No valid keys troubleshoot

1.3.15

(2018-07-27)

Fixed

- Product Performance detailed report does not filter by selected product

---

1.3.14

(2018-07-24)

Fixed

- Update API codes for fetching geodata and update unknown post codes

---

1.3.13

(2018-07-19)

Improvements

- Add customer group filter to Product Performance report

Fixed

- Report emails sent multiple times

1.3.12

(2018-07-13)

Fixed

- Report New vs Returning Customers: treat guest customers as new

Documentation

- Change admin panel startup page

1.3.11

(2018-07-02)

Improvements

- Add order status filter to Sales by Category and Sales by Attribute reports

---

1.3.10

(2018-06-21)

Fixed

- Correctly display 'Total Cost' value at Product Performance report

---

1.3.9

(2018-06-19)

Fixed

- Report Sales by Geo-data is not filtered by date

1.3.8

(2018-06-19)

Improvements

- ACL permissions for report settings

1.3.7

(2018-06-06)

Improvements

- Add Payment Method filter to Sales Overview report

Documentation

- Information about totals in custom reports
- How to add attribute column to custom report with Report Builder

---

1.3.6

(2018-06-04)

Fixed

- Issue with Total Cost
- Issue with filtration by store view
- Postcodes

1.3.5

(2018-04-25)

Improvements

- Additional columns for Sales Overview and Sales by Attribute reports

---

1.3.4

(2018-04-17)

Fixed

- Error displaying abandoned cart detailed report

1.3.3

(2018-04-17)

Fixed

- Error during compilation: remove extra dependency
- Compatibility with Magento 2.1

1.3.2

(2018-04-05)

Fixed

- Detailed product report opened from Product Performance report does not display information for specific product

---

1.3.1

(2018-02-16)

Features

- Report Builder

Documentation

- Report Builder documentation

1.3.0

(2018-02-09)

Improvements

- Geo Report

Fixed

- Report Sales By Customer
- Added Managing of Geo Data menu item

1.1.35

(2017-12-07)

Improvements

- Added filters by "Customer Group", "Order Status", "Day of Week of purchase" to "Sales by Attribute" and "Sales by Attribute Set" reports

---

1.1.34

(2017-12-07)

Fixed

- filters by "Customers > Products" and "Abandoned Carts > Abandoned Products" columns

---

1.1.33

(2017-12-06)

Fixed

- Filter by "Products" column

1.1.32

(2017-12-04)

Improvements

- Added "Product Total Margin" field

1.1.31

(2017-12-04)

Fixed

- API urls for post codes
- Added "mirasvit:reports:test" console command

1.1.30

(2017-11-13)

Features

- Added "Customers" report

1.1.29

(2017-10-26)

Fixed

- Updated connection for quote tables

Improvements

- Added "Tax Title", "Tax Percent" to Orders report

1.1.28

(2017-10-24)

Features

- Added "Sales by Attribute Set" report

1.1.27

(2017-10-17)

Improvements

- Added column "Gross Margin" to "Product Performance" report

---

1.1.26

(2017-10-17)

1.1.25

(2017-10-17)

Improvements

- Added column "Invoice ID" to Sales > Orders report
- Added "Grand Total excluding Tax" column to the Sales reports

---

1.1.24

(2017-10-02)

1.1.23

(2017-09-27)

Fixed

- Compatibility with Magento 2.2

1.1.22

(2017-09-18)

Fixed

- Fix cron error 'undefined property' when executing 'reports_postcode_update' cron job
- Compatibility with Magento 2.2.0rc

1.1.21

(2017-08-22)

Improvements

- Added Transaction ID and Type to Orders report
- Added "customer group" column to Abandoned Cart reports

Fixed

- Fixed the hints for quarters when building a quarterly report.
- Fixed the issue with duplication in "Qty Refunded" column
- Corrected the calculation of the "out of stock estimate" for the case of a negative quantity of product in inventory

---

1.1.20

(2017-08-07)

Features

- Added "Abandoned Products" report
- Added "Abandoned Prodacts / Detail" report

Improvements

- Added chart to "Product Performance Detail" report

1.1.19

(2017-08-02)

Fixed

- Fixed accounting of "active" abandoned carts

1.1.18

(2017-08-02)

Fixed

- Fixed requirements for compatibility with the mirasvit/module-report

---

1.1.17

(2017-08-02)

Features

- Added "Abandoned Carts Overview" report
- Added "Abandoned Carts" report

Improvements

- Improved reports menu view

1.1.16

(2017-08-01)

Features

- Added "Sales by Cart Price Rules" report
- Added "Sales by Tax Rates" report

Improvements

- Added ability to view the sold products from "Sales Overview" report

---

1.1.15

(2017-07-11)

Improvements

- Added column "QTY refunded" to Sales Overview report

1.1.14

(2017-07-11)

Improvements

- Added 2 columns "Out of Stock Estimation Date" and "Stock Qty"

1.1.13

(2017-07-11)

Improvements

- New Charts

1.1.12

(2017-06-27)

Features

- Modified the method of using Google geocoding

1.1.11

(2017-06-21)

Improvements

- Refactoring

1.1.10

(2017-06-15)

Fixed

- Fixed an issue with default filter in "Sales by Attribute" and "Sales by Category" reports

---

1.1.9

(2017-06-08)

Fixed

- An issue with DaysOfWeek column

1.1.8

(2017-06-07)

Improvements

- Removed global limitation by order status

1.1.7

(2017-05-31)

Fixed

- Issue with duplication at "Product Performance" report

1.1.6

(2017-05-30)

Features

- Added filters to Manage Geo Data Grid

1.1.5

(2017-05-30)

Fixed

- Issue with geo redeclaration default UI

1.1.4

(2017-05-29)

Features

- Added possibility to delete Geo data from admin panel

Fixed

- Fixed an issue of obtaining and duplication of Geo data in different languages

---

1.1.2

(2017-05-17)

Fixed

- Fixed Email Notification ACL

1.1.1

(2017-05-04)

Fixed

- Fixed the issue with Gross Profit in the case when the cost of product is not defined
- Fixed issue with cron job with Email Notifications

1.1.0

(2017-02-20)

Fixed

- Pool and dateHelper at email notification
- Pool at email notification

1.0.19

(2017-01-09)

Improvements

- Ability to filter by order status
- GEO

1.0.18.1

(2016-12-23)

Fixed

- Fixed an issue with cronjob

1.0.18

(2016-12-22)

Improvements

- Improved geo-data fetching logic

1.0.17

(2016-12-15)

Improvements

- Base geo reports

Fixed

- Fixed an issue with date ranges

1.0.16

(2016-09-20)

1.0.14

(2016-07-28)

Fixed

- Fixed an issue with report Product Performance - Detail

1.0.13

(2016-07-27)

Fixed

- Fixed an issue with wrong product cost calculations

1.0.12

(2016-07-01)

Fixed

- Renamed report.xml to mreport.xml (compatibility with module-support)

1.0.11

(2016-06-24)

Fixed

- Compatibility with Magento 2.1

Documentation

- Updated installation instructions

1.0.9, 1.0.10

(2016-05-31)

Fixed

- Fixed an issue with building reports based on all orders (filteration by status are missed)
- Fixed an issue with wrong requirements

1.0.8

(2016-05-27)

Improvements

- Added ability to filter all reports by store

1.0.7

(2016-05-25)

Fixed

- Fixed permissions issue

1.0.6

(2016-05-19)

Improvements

- Added Products column to Orders report

1.0.5

(2016-04-11)

Improvements

- Integration tests
- Refactoring

Fixed

- Fixed an issue with menu
- Minor fixes
- Fixed an issue with filtration

Documentation

- Updated installation steps

1.0.4

(2016-02-29)

Fixed

- Fixed an issue with wrong requirejs declaration
- Fixed an issue with percent calculation
- Fixed an issue with applying the filters
- Fixed an issue with di compilation
- Removed geo export console command

1.0.3

(2016-02-02)

Improvements

- Update required core version to 1.2

Welcome to the Advanced Reports Guide!

Here you will find everything you need to set up and use an Advanced Reports. Whether you are a new or an advanced user, you can find some useful information here.

The **Advanced Reports** Extension includes **Advanced Report**, **Advanced Reports**, and **Advanced Dashboard** modules.

First, please find your extension in your account in My Downloadable Products section. Then, start with Installation and Quick Start option. It is best to follow our step-by-step guide in order to configure the best search results.

Go ahead, dive in!

Learn about the initial setup:

- Installation

- Quick Start