

# Preparing Reports

## Preparing Source Management Report Archives

The screenshot shows the 'Order Reports' section of a web application. At the top, there is a navigation bar with tabs for Dashboard, Segments, Reports (highlighted with a red circle 1), Archives, Scheduling, and Settings. Below this, there are sub-tabs for Orders, Customers, and Products. The main heading is 'Order Reports', followed by a note: 'Select a Report to view, print or output as an Excel spreadsheet. Note: if using a pick list, only reports filtered by a single selection can be viewed.' Below the note, there are three main sections: 'Show Reports of Type' with a dropdown menu set to 'Show all reports'; 'Prepare Your Report(s)' with 'Print' and 'Create CSV' buttons and '1 Report(s) Selected' text; and 'Archive Your Report(s)' with a checked checkbox for 'Save to Administrator Folder (./wp-content/uploads/geton\_reports/2019-11-14/administrator/)', a text input for 'Add Tag to Date Folder (yyyy-mm-dd~tag):' containing 'October 2019', and another text input for 'Save to Sub-folder (yyyy-mm-dd/.../folder):' containing 'source\_administrator'. At the bottom, there is a table with columns for 'Print / Email', 'Layout', and 'Order Reports'. The 'Print / Email' column has a checked checkbox (highlighted with a red circle 5) and the 'Layout' column shows 'Summary'. The 'Order Reports' column shows 'Completed, Closed Date, Mo. Comparison'. On the right side of the table, there is a 'Filter from Pick Lists' section with a red circle 6, containing three pick lists: 'Abbotsford', 'Brampton', 'Burlington', 'Burnaby', '- To Month -', 'Nov 2019', 'Oct 2019', and 'Sep 2019'.

## Saving Report PDFs for Source Management Staff

1. Go to the “Reports” tab
2. Check the “Save to Administrator Folder”. This will save the report PDFs to `/wp-content/uploads/geton_reports/2019-11-14/administrator/...`
3. Enter the month/year period (October 2019). This will add the period to the date folder name. I.e: `/wp-content/uploads/geton_reports/2019-11-14~october 2019/administrator/`. This tag will be shown as a subheading as a grouping of the PDFs to the staff member.
4. Enter “source\_administrator” (lowercase, exactly). A “source\_administrator” subfolder will be created (`/wp-content/uploads/geton_reports/2019-11-14~october 2019/administrator/source_administrator/` in which the PDFs will be saved. This restricts viewing of the contained PDFs to Source Management staff only.
5. Check off each report you want to print (a list of reports to send to Source Management is at the end of this document)
6. Select the date period for each report -- leave the store pick unselected (so Source Management staff can see reports for all stores).
7. When finished, email Source Management staff the <https://www.source.ca/source-reports/> link.

Example:

Add Tag to Date Folder (yyyy-mm-dd~tag):		February 2020		
Save to Sub-folder (yyyy-mm-dd/~folder):		source_administrator		
<input type="checkbox"/> Print / Email	<input type="checkbox"/> Layout	Order Reports	Filter from Pick Lists	
<input checked="" type="checkbox"/>	Summary	Completed, Closed Date, Mo. Comparison	Abbotsford Brampton Burlington Burnaby	- To Month - Feb 2020 Jan 2020 Dec 2019

## Preparing Source Store Report Archives

Orders Customers Products

### Order Reports

Select a Report to view, print or output as an Excel spreadsheet. *Note: if using a pick list, only reports filtered by a single selection can be viewed.*

Show Reports of Type Show all reports

Prepare Your Report(s) Print Create CSV 1 Report(s) Selected

Archive Your Report(s)

- 1  Save to Administrator Folder (./wp-content/uploads/geton\_reports/2019-11-14/administrator/)
- 2 Add Tag to Date Folder (yyyy-mm-dd~tag):
- 3 Save to Sub-folder (yyyy-mm-dd/.../folder):

---

<input type="checkbox"/> Print / <input checked="" type="checkbox"/> Email	<input type="checkbox"/> Layout	Order Reports	<input type="checkbox"/> Filter from Pick Lists
<input checked="" type="checkbox"/>	Summary	Completed, Closed Date, Mo. Comparison	5 <span>Edmonton</span> <span>- To Month -</span> <span>Kelowna</span> <span>Nov 2019</span> <span>Langley</span> <span>Oct 2019</span> <span>Markham</span> <span>Sep 2019</span>

## Saving Report PDFs for Source Managers

1. Check the “Save to Administrator Folder”. This will save the report PDFs to /wp-content/uploads/geton\_reports/2019-11-14/**administrator**/...
2. Enter the month/year period (October 2019). This will add the period to the date folder name. Ie: /wp-content/uploads/geton\_reports/2019-11-14~**october 2019**/administrator/. This tag will be shown as a subheading as a grouping of the PDFs to the staff member.
3. Enter the store name (lowercase). A “store” subfolder will be created (/wp-content/uploads/geton\_reports/2019-11-14~october 2019/administrator/**kelowna**/ in which the PDFs will be saved. This restricts viewing of the contained PDFs to staff that are associated with the designated store.
4. Check off each report you want to print (a list of reports to send to Source Manager is at the end of this document)
5. Select the date period for each report.
6. Select the designated store -- Make sure the store entered in #3 above matches this selection otherwise another store’s report will be accessible to this store manager (ie. if #3 is kelowna, select Kelowna from the pick list)
7. When finished, email Source Managers the <https://www.source.ca/source-reports/> link.

Example:

Archive Your Report(s)

Save to Administrator Folder (/wp-content/uploads/geton\_reports/2019-11-14/)

Add Tag to Date Folder (yyyy-mm-dd~tag): February 2020

Save to Sub-folder (yyyy-mm-dd/~folder): kelowna

Print /  Layout    Order Reports     Filter from Pick Lists

Email

Summary    Completed, Closed Date, Mo. Comparison

Calgary  
Edmonton  
Kelowna  
Langley

Dec 2019  
Nov 2019  
Oct 2019  
Sep 2019

## Report Access Permissions

### Store Managers

<b>What Managers Can Access</b>	<b>What Managers are Sent</b>
<p><u>Summary</u> Orders, by Assignee, Mo. Comparison Orders, by Status, Mo. Comparison</p> <p><u>Detailed</u> Completed, Closed Date, by Store Completed, New Customers, Closed Date, by Store Orders, by Status</p>	<p><u>Summary</u> Orders, by Assignee, Mo. Comparison Orders, by Status, Mo. Comparison</p> <p><u>Detailed</u> Completed, Closed Date, by Store Completed, New Customers, Closed Date, by Store Orders, by Status</p>

## Source Management

What Management Can Access	What Management are Sent
<p><u>Summary</u>  Completed, Avg. Value, Closed Date, Mo. Comparison  Completed, Closed Date, Mo. Comparison  Completed, Form Submissions, Closed Date, Mo. Comparison  Completed, Start Date, Mo. Comparison  Orders, All Leads, by Store, Start Date, Mo. Comparison  Orders, by Assignee, Start Date, Mo. Comparison  Orders, by Status, Start Date, Mo. Comparison  Orders, by Store, Start Date, Mo. Comparison  Orders, Form Submissions, Start Date, Mo. Comparison  Orders, Service/Flyer/Warranty Requests, Start Date, Mo. Comparison  Orders, Space Planning Only, Completed, Closed Date, Mo. Comparison  Orders, Space Planning Only, Start Date, Mo. Comparison  Xceptions - Cancelled Orders, by Assignee and Status, Start Date, Mo. Comparison  Xceptions - Cancelled Orders, by Assignee, Start Date, Mo. Comparison  Xceptions - Cancelled Orders, by Cancelled Reason, Start Date, Mo. Comparison  Xceptions - Cancelled Orders, by Store, Start Date, Mo. Comparison  Xceptions - Orders, Pending, by Status, Start Date, Mo. Comparison  Xceptions - Orders, Quoted, Start Date, Mo. Comparison</p> <p><u>Detailed</u>  Completed, Closed Date, by Store  Completed, Closed Date, Discounted, by Store  Completed, Form Submissions, Closed Date  Completed, New Customers, Closed Date, by Store  Completed, Start Date, by Store  Orders, Form Submissions, Start Date  Orders, Form Submissions, with Blank Reasons, Start Date  Orders, Space Planning Only, Completed, Closed Date  Orders, Space Planning Only, Quote Request, Start Date  Orders, Space Planning Only, Start Date  Orders, Start Date, by Status  Orders, Start Date, by Store [#44310 - detailed]</p>	<p><u>Summary</u>  Completed, Closed Date, Mo. Comparison  Orders, by Store, Start Date, Mo. Comparison  Orders, by Assignee, Start Date, Mo. Comparison</p> <p><u>Detailed</u>  Completed, Closed Date, by Store  Completed, New Customers, Closed Date, by Store  Xceptions - Orders, Pending, Start Date, by Status</p>

Xceptions - Cancelled Orders, Start Date, by Store Xceptions - Orders, by Status, No-Value, Start Date Xceptions - Orders, Pending, Start Date, by Status Xceptions - Orders, Pending, Start Date, by Store Xceptions - Orders, Quoted, Start Date, by Store	
--	--

## Report Emailing Schedules

1. Management Reports are prepared and emailed to [rose@geton.com](mailto:rose@geton.com), [jgrindley@source.ca](mailto:jgrindley@source.ca) and [smoney@source.ca](mailto:smoney@source.ca) on the **first Thursday** of each month.
2. Store Manager Reports are emailed to the respective store manager on the **second Thursday** of each month (one week days after #1 above)
3. Management Reports are emailed to [JSheppard@source.ca](mailto:JSheppard@source.ca), [SMoney@source.ca](mailto:SMoney@source.ca), [JGrindley@source.ca](mailto:JGrindley@source.ca), [MTuck@source.ca](mailto:MTuck@source.ca) on the **same day as #2**.

## Notes/Tips

1. Going forward, instead of emailing PDF attachments to Source management and stores, GetOn will email a link to an archive page that will list the reports. You just have to make sure you are logged in to view this page's contents.
2. Summary reports display comparative data across a period of time (ie.: months); Detailed reports display data for a single, picked period (ie. month of May 2019 rather than data up to end of May 2019)
3. Choosing a picked date period for a **summary report** will return data up to the **end of the chosen period** (May 2019 returns data up to and including end of May 2019). Choosing a picked date period for a **detailed report** will return data for **that period only** (May 2019 returns data for May 2019 only).
4. You will not be able to view a report if multiple items in a pick list are chosen (ie.: multiple dates)