

What is a Report Base?

Base Reports serve as the starting point for building your own customer reports. Here is a brief summary of each base report.

Report Base Definitions

Allocation Offering

Summary report for the members an allocation or allocations have been offered to and the open period for that allocation.

Club Member Report

This report will give you member details and club membership information for anyone who has a club membership (both active and cancelled) on the eWinery system. The report defaults to looking for Active members only, to view both active and cancelled remove the “ActiveClubMember?” filter in Step 2.

Gift Card Usage Report

This report will show you a list of all orders that used a eWinery gift Certificate as tender.

Member

This report is the widest net you can cast against member data in your database. This report will show you any attribute for your members with the exception of sales data.

Member Addresses

This is a summary report for all of the address info for each member. Results will be the member name, billing address, shipping address (primary from address book) and club shipping address.

Member Value

This report looks at the spending habits of all of your customers. It takes into account all sales channels and returns results for Total spend, average spend and last purchase. This is an excellent report for identifying your top customers.

Payment Detail

Offers a list of sales with Order Type and Payment Type details. Used for reconciling credit card statements and sales.

Sales Detailed

This is a sales report that looks breaks down orders by line item. This is the most detailed information you can get against sales records.

**The Report Base list also displays a modified version of this report which reports the void orders which are normally excluded from this report.*

Sales Summary

This is a summarized version of the report above, one line per order with no item breakdown.

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Sales Tax By State

This is a version of the sales Summary Report above that looks specifically at Ship to States and Sales Tax.

Will Call Report

This is another version of the Sales Summary report that looks at only orders that have a shipping type of “Will Call”. This report includes the ability to filter by whether or not the order has been picked up.