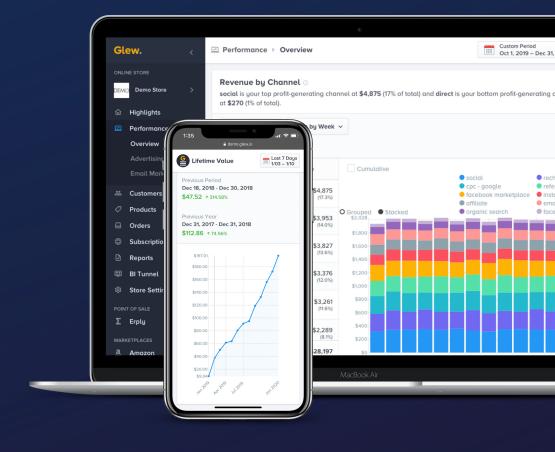# ONBOARDING GUIDE #2

Reporting

Glew.

REPORTING OVERVIEW

There's a lot you can do right in the Glew app, as we went over in our Glew 101 guide. But if you're just interacting with your data in Glew, you're missing out on some of Glew's most useful functionality: scheduled and automated reports.

With Glew's Reports tool, you can:

- Build customized reports using data from anywhere in Glew
- View previously created reports
- Create different reports for different functional groups or seniority levels
- Email reports to anyone on your team
- Schedule reports to send later
- Schedule automated reports to be delivered daily, weekly or monthly
- Export report data as CSVs
- View or print reports in document mode for presentations or meetings
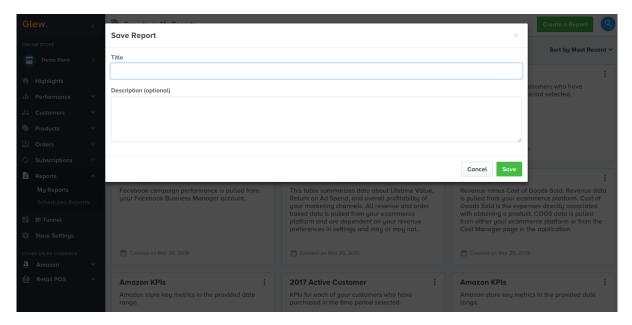
The main benefit? You can get insights delivered straight to your inbox, anytime you want - so you can stay on top of performance without even logging into Glew.

Read on to learn more about our Reports tool and how you can use it to get deeper insights from your data.

HOW TO CREATE REPORTS

We made it incredibly easy for anyone to create reports in Glew. To follow along below, go to Reports in Glew, then click on My Reports.
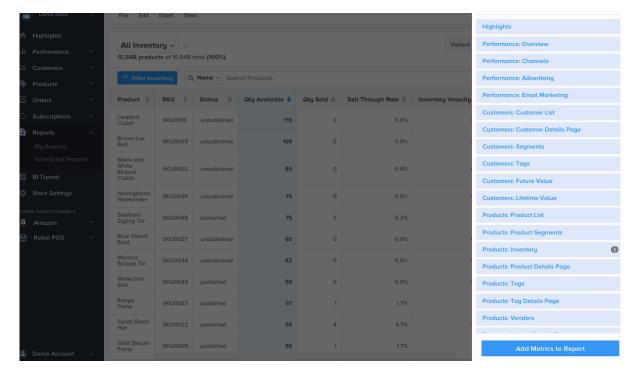
To create a report, you'll click the green Create a Report button in the top right-hand corner. You'll see a screen that looks like this:
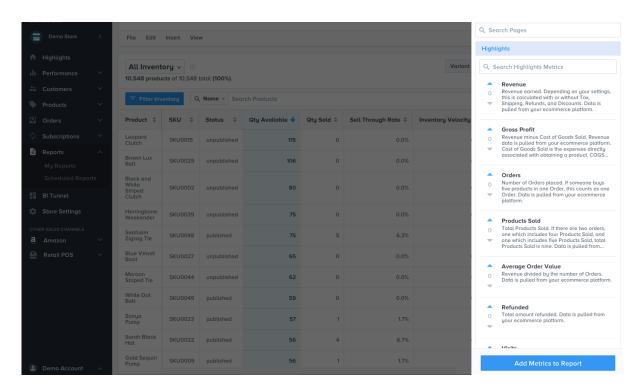

Creating a report in Glew

Title your report (like Daily Revenue or Weekly Orders), and give it a description that helps you remember what it includes - this will display on your Reports dashboard.

Next, start adding metrics to your report from the screen below. Click Add Metrics to see a list of all the data and visualizations available in Glew, organized by where they are in the app (it's also searchable). There, you'll be able to add the individual metrics you want to see in your report. Click the up arrow beside each metric to select it, then click Add Metrics to Report.
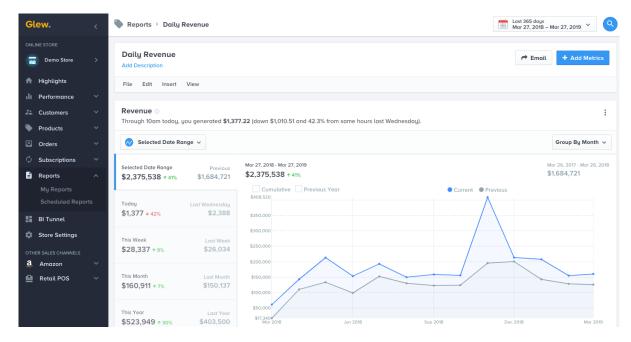
Adding metrics to a report

Adding metrics to a report

Any metric you add to a report can be filtered for that specific report - click the three dots above each metric once it's in the report to filter.

Here's an example: if you want to look at revenue for desktop, mobile, and tablet in a report, you'd add Revenue 3 times, then filter each one by the device you want.

Once you're done, you'll see something like the screen below. It will look similar to the tabs you see throughout Glew - but it will be a custom combination of data, visualizations and filters that you selected.
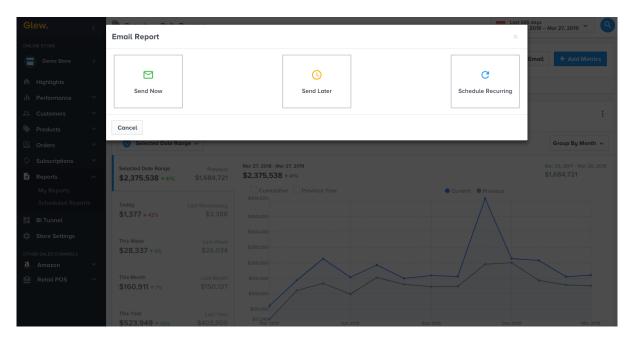

A report built in Glew

Now that you've created your first report, learn what you can do with reports in Glew!

HOW TO SEND REPORTS

Once you've created a report, you can choose how you want to deliver it. You have a few options:

- You can view the report anytime in Glew under My Reports
- You can email the report one time to an individual or group
- You can schedule the report to send later to an individual or group
- You can schedule the report to send on a recurring basis

Click Email in the top right-hand corner of My Reports to see your options for delivery. You'll see a screen that looks like this:

Options for report delivery

When you click on one of those three options, you'll see an option that looks like this (below, for "Schedule Recurring"):

Customizing options for report delivery

Choose who you want to send your report to, when, and for what date range. Then click Schedule Report or Send Report, and you're in business.

What reports should I send, when?

Different reports make sense to send at different times or cadences. Below are a few examples:

One-time reports

Create and send one-time reports for things you're interested in looking at for a particular occasion, or over a specific period of time. A few examples:

- Your store performance over Black Friday or the holidays
- Your performance over your peak season (like spring or summer, if you're a swimsuit brand)
- A report for a particular occasion, like a company meeting or investor presentation

Keep in mind that any report you create to send once can always be accessed again - it will automatically be saved and will continue to update in your My Reports dashboard, unless you delete it.

Daily reports

Glew automatically sends a Daily Snapshot report with your store's most critical performance data (you can opt in or out of receiving the Daily Snapshot in Store Settings). But you can also create your own daily reports with other metrics you want to track on a more granular level. Some options to include in daily reports:

- Orders
- Revenue by traffic source
- Conversion rate
- Marketing campaign metrics

Weekly reports

Weekly reports are useful for ecommerce stores - you may want to send these to your teammates who aren't as in the weeds to keep them informed. Some recommendations for scheduled weekly reports:

- Revenue by device
- Product performance by segment
- Customer performance by segment
- Net profit

Monthly reports

Monthly reporting helps you see broader trends in your store's performance - like if you're acquiring enough new customers, if your ad spend is sustainable, and if you're growing in the right areas. Try setting these up as monthly reports:
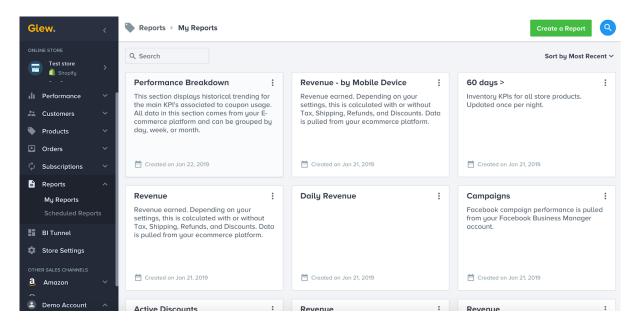
- At-risk customers
- Products nearing their out-of-stock date
- New customers by channel
- Net profit by channel
- Average order value

Learn more about specific reports to create in our Top 10 Reports section here.

HOW TO UPDATE REPORTS

Any report you create - even if you don't schedule it to be recurring at the time - will be saved to your My Reports dashboard, where you'll be able to view different date ranges, update the title or description, add or remove metrics, send or schedule reports, make copies, export data, or view in presentation mode. Every report you create will continue to be updated with accurate data.

Click on a report in your dashboard (pictured below), then use the menu and top navigation to make changes or schedule your report.

Your reports dashboard in Glew

GLEW'S TOP REPORTS

There's no limit to the reports you can create in Glew, using one or 100 different metrics. But there are a few high-value reports that we recommend creating ASAP to start getting valuable insights.

Below are the Glew team's top reports, organized by role:

- Getting Started: C-suite reporting
- Turning Up the Heat: Marketing and customer behavior
- Cutting the Fat: Operations and merchandising
- Extras: Miscellaneous but important reports

Getting started: C-suite reporting

The goal of a CEO isn't to maximize revenue - it's to maximize profit. What if you made $100,000 in a day, but your costs were $101,000? That's a big problem. The first set of reports you should set up revolve around measuring and optimizing your profitability. Use the 5 reports below to achieve this first layer of understanding about your business's performance.

⭐ **1. Revenue**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Highlights
- Add 1 Revenue
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ **2. Gross Profit**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Highlights
- Add 1 Gross Profit
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ **3. Net Profit**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Performance: Overview
- Add 1 Performance KPIs
- Click "Add Metrics to Report"
- Filter for Net Profit on the Performance KPIs visualization
- Click "Email" to schedule recurring weekly

⭐ **4. Net Profit by Channel**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Performance: Overview
- Add 1 Net Profit by Channel
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ **5. Lifetime Value**

SCHEDULE THIS: Monthly

Create this report:

- Create Report > Add Metrics
- Find Customers: Lifetime Value
- Add 1 Lifetime Value KPIs
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring monthly

LTV is the cornerstone of every ecommerce store - you always want this line to be trending in the right direction. LTV can tell you a lot about your strategy and where you should be focusing your efforts. Do you see a big spike in your LTV curve? Either you're doing a great job upselling, or you're lacking new customers. Is your curve starting to level out? Either you did a great job getting new customers, or you're not upselling enough.

LINK: For more on lifetime value, see our Glew Academy video on LTV!

Turning up the heat: marketing and customer behavior

The second layer of reporting you should focus on revolves around your customers and their behavior. (After all, without demand from your customers, you wouldn't have a business). These reports have two goals: (1) help you acquire the "right" customers and (2) upsell those customers. In other words, focus on acquiring customers who have the highest potential LTV.

⭐ 1. Visits

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Highlights
- Add 1 Revenue and 1 Visits
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ 2. Conversion

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Highlights
- Add 1 Revenue and 1 Conversion Rate
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ 3. Revenue by Channel

SCHEDULE THIS: Monthly

Create this report:

- Create Report > Add Metrics
- Find Performance: Overview
- Add 1 Revenue by Channel
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring monthly

LINK: For more on revenue by channel, see our webinar on attribution modeling!

⭐ 4. LTV Profitability by Channel

SCHEDULE THIS: Monthly

Create this report:

- Create Report > Add Metrics
- Find Customers: Lifetime Value
- Add 1 LTV Profitability by Channel
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring monthly

This report, based on Glew's first-purchase attribution model, helps you understand the value of and optimize your ad channel performance. Look at your lifetime value by channel. Then, look at the number of customers coming from each channel. If your LTV is high but the number of customers is relatively low, you may want to invest more in that channel - or vice versa.

⭐ **5. VIP and Value Shoppers**

SCHEDULE THIS: Monthly

Create this report:

- Create Report > Add Metrics
- Find Customers: Segments
- Add 1 VIP Customers and 1 Value
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring monthly

LINK: For more on customer segments, see our Glew Academy video on segmentation!

⭐ **6. Active, At-Risk and Lost Segments**

SCHEDULE THIS: Monthly

Create this report:

- Create Report > Add Metrics
- Find Customers: Segments
- Add 1 Active, 1 At-Risk and 1 Lost
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring monthly

This report tells you which of your customers are active, at risk and lost based on where are in relation to your business's individual lapse point - the number of days you have to get a customer to make a repeat purchase before they're considered "lost." It also helps you prioritize which customers to reach out to, and how.

LINK: For more, see our Glew Academy video on lapse point!

Cutting the fat: merchandising and operations

The third layer of reports you should create focuses on your physical capital and cash, and how you can use your capital to achieve the two goals we talked about above in the most profitable way possible. One example of using this type of report successfully? Avoiding tying up your cash in products that no one wants any more, and instead investing that in other areas of the business.

⭐ **1. Product Segments**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Products: Segments
- Add 1 Hot Products, 1 Cold Products, 1 Most Refunded Products, 1 Top Products Bundled
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

Don't sleep on this report - it's arguably the most important piece of your operations reporting. It can help you consistently identify your best- and worst-selling products, as well as identify any anomalies with production or shipping that you need to look into so you can nip those issues in the bud.

⭐ **2. Product Tags**

SCHEDULE THIS: Weekly

Create this report:

- Create Report > Add Metrics
- Find Products: Tags
- Add 1 Product Tags
- Click "Add Metrics to Report"
- Click "Email" to schedule recurring weekly

⭐ **3. Inventory Metrics**

SCHEDULE THIS: Based on your own restocking cadence (typically every 30, 60 or 90 days)

Create this report:

- Create Report > Add Metrics
- Find Products: Inventory
- Add 1 All Inventory
- Click "Add Metrics to Report"
- Make sure Sell Through Rate, Inventory Velocity, Holding Costs and Out of Stock Date are visible - you can hide or include anything else
- Click "Email" to schedule recurring

USE CASES FOR REPORTS

Creating reports is easy, right? Now, let's talk about what you can do with them. Because while it's great to send yourself automated performance reports, Glew's reporting can help you with a lot more.

Automated updates for the entire team

The great thing about Glew? You can customize the reports that any team or individual receives - so the marketing team can create and schedule super-detailed reports on channel performance, the ecommerce manager can dive deep on products and inventory, and the C-suite can get high-level performance overviews. Create the automated reports that make sense for your individual role or team, add anyone you want, and schedule them whenever you want.

Easier performance reporting for meetings

If you have regular weekly or monthly (or even daily) performance meetings, Glew makes it easier to gather the data you need to prepare. Just create a report with the data you need (whether it's revenue, new customers acquired, customer status, product performance or channel performance), schedule it at the right cadence, and you have everything you need, without scrambling over Excel spreadsheets at the last minute - you can even view your reports in document mode for easy presenting.

Helpful visuals for board or investor meetings

Need impressive data for a board meeting or investor presentation? Glew gathers all the data you need to make a good impression. Create a custom report with all the metrics you need in Glew, filter it in real time to respond to questions on the fly, view it in document mode for easy presenting, and even email it out afterwards to follow up.

ADDITIONAL REPORTING OPTIONS

Glew's out-of-the box reporting tools give you a ton of flexibility when it comes to creating the unique reports you want to see based on data that's available in Glew. But if you need additional custom reporting - visualizations that aren't native to Glew, industry insights across your products or brands, multi-store aggregate reporting or cohort analysis - we have a few additional options.

BI Tunnel

Glew's BI Tunnel allows users to launch custom reporting dashboards right in the Glew.io app. You can use our included BI tool, Mode (inclusive with a Glew Plus subscription), create reports in Google Data Studio, or choose your own BI tool.

Glew Enterprise

Glew Enterprise gives you access to your own completely customized reporting dashboards, separate from the out-of-the-box Glew.io product. Our team will work with you to create the exact reports and dashboards you need, and you'll log in through your own dedicated URL.

Both these options are ideal for businesses who need to report on multiple stores or domains, or across multiple internal departments, and need the ability to do rolled-up reporting and advanced custom reporting. The Glew Advisory Services team is also available to help create custom reports.

ADDITIONAL RESOURCES

This guide will help you get set up and start using Glew, but we have more resources to help you get the most out of our platform. Check it out below, and let us know if you have any questions!

Good luck, and happy reporting!

- FAQs
- Guides
- Video tutorials
- Articles