Daily Sales Report

This is a great report to reference because it displays as calendar view. This makes it simple to track trends across days, weeks, months, or years! You are also able to create log entries to reference in the future.

1. Sign into **Manage System**
2. Select the **POS Module**

Modules

POS Module	Retail Module	Employee Module	Customer Module	Gift Cards	Credit Cards
Inventory Module	Tax Module	Ticket Audit	Messaging Module	Activity Logging	Setup
Business Reports	Online Ordering Module	Historical Archive	E-Mail Reports	Training Mode	Docs
Business Performance Report	Kiosk Module	K2			

3. Select the **Daily Sales Report**

Managerial Reports | Management

Daily Sales	Sales By Server	Sales By Category	Sales By Terminal	Sales By Modifier	Manage Orders	Cash Drawer Checkout	Change Payment Method	Manage Locks
Cancelled Orders	Discount Report	Promos Report	Specials Report	Surcharge Report	Cash Drawer Owners	Holds	Shifts	Paid In/Out

4. Use the arrow tools to navigate months (< | >), or years (<< | >>)

Daily Sales Report
(Net Sales, closed, before taxes, before discounting)
☐ after discounting, ☐ week starts on Monday

<<	<	November 2019	>	>>	Done
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total

5. To view the sales data, select the amount of sales on that day and view the snapshot on the right.

Daily Sales Detail
(Closed Sales)
For 11/29/2019

	Total	Dine-In	To Go
Cancelled Items	$22.23	$22.23	$0.00
Cancelled Orders	$49.45	$49.45	$0.00
Closed-PM Sales	$6,113.43	$5,683.02	$430.41
Gross Sales	$6,646.38	$6,174.99	$471.39
Sales Tax	$634.39	$591.67	$42.72
Net Sales	$6,011.99	$5,583.32	$428.67
Specials	$4.00	$4.00	$0.00
Discounts	$88.43	$88.43	$0.00
Promos	$0.00	$0.00	$0.00
Total, Net Discounts	$5,919.56	$5,490.89	$428.67

Detail Links

Sales By Server	Sales By Category
Cancelled Orders	Discount Report
Hourly Sales	Specials Report
Surcharge Report	Sales Tax By Month

**Note:** You are able to select the quick links to view the specific reports for that day.

6. To create a log entry on a specific date selects the **Log** text

29
$6,011.99
Log

7. Add your log text on the right and select **Update** to save

| Yesterday | Tomorrow |

Log Entry

255   characters left
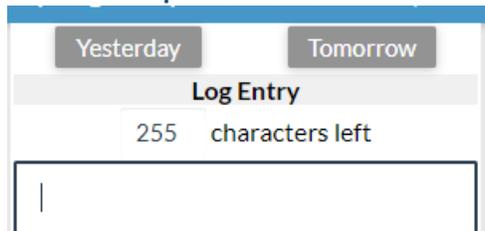
8. View / print all the log entries by selecting **View Log Entries** at the bottom of the screen

View Log Entries For Month
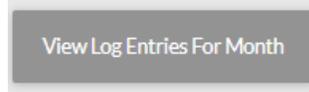
GL Report

This report is ideal for tracking a date range of sales, payment methods, or deposits. Here you will find your sales grouped in **GL Accounts** *(General Ledger Accounts)* so that you can find a total sales number for a group of categories.

For example: a Liquor GL account would include your Vodka, Gin and Run categories.

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Business Reports	Online Ordering Module	Historical Archive	E-Mail Reports	Training Mode	Docs
Business Performance Report	Kiosk Module	K2			

3. Select the **GL Report**

Accounting Reports

					Actions	Pizzas	Views	Specials
Server Report	Payment Methods	Server Deposits	G/L Report	Dashboard Report	Define Discounts	Define Promos	Define Specials	Define Surcharges
Cash Drawer Report	Paid In/Out Report	Server Tips Paid	Sales Tax By Month	Real-Time X Report	GL Accounts	Choose Payment Methods	Edit Tipout Rates	Age Checking
Declared Tips	Order Payments	Usage Report	Deposits By Terminal	Export Data	Menu Images			

4. You can view one day at a time, or view a date range by selecting the **Advanced View** button

This will allow you to use the calendar tool, or manually adjust your date in the fields below. Once your range is set, select **Refresh**

5. Your report should be displaying now. What populates in the report can be adjusted using the checkboxes listed here. Select **Update** to change your selection.

Configure	
Include Item Discounting w/GL Acct	☐ Include
Show Credit Cards	☑ Show
Show Payment Methods	☑ Show
Show Prepaid Summary	☑ Show
Show Customer Charge Summary	☑ Show
Show Included Taxes with Item	☑ Show
Show Terminal Group GL Sales	☐ Show
Update	

Dashboard Report

This is report allows us to view an in-depth snapshot of several reports for one day at a time. Similar to the **GL Report**, except here we can see a breakdown of Promos, Specials, and much more.

1. Sign into **Manage System**
2. Select the **POS Module**

3. Select the Dashboard Report

4. Select what you do not want to see, Update to save

Select Report Categories To Exclude							
☑ Category Sales	☐ G/L Report	☑ Prepaid Accts	☐ Gift Cards	☑ Cust. Charge	☐ Credit Cards	☐ Labor	☐ Discounts
☑ Promos	☐ Specials	☐ Cancelled	☑ Surcharges	☑ Paid In/Out	☐ Payments	☐ Deposits	
			☐ All				
			Update				

Real-Time X Report

This report prints out very nicely on receipt printer and includes the need to know details for the day; including the **Net Cash** amount. *Net Cash is the total cash that you would take to the bank.*

Note: it is possible for Net Cash to be negative. In that case your employee's tips would have exceeded the cash taken for the day *assuming you are giving tips away each day.

1. Sign into **Manage System**
2. Select the **POS Module**

3. Select the Real-Time X Report

4. Print the report by selecting **Output to Receipt Printer**

Information for: 12/03/2019

Category	Count	Sales
Beer	1	$3.50
Beverages	1	$2.99
Desserts	1	$2.99
Sandwiches	2	$19.48
Seasonal Drinks	1	$7.00
$Burger/Sand Adds	10	$28.59
$Drink Modifiers	1	$1.00
$Liq Upsell	1	$3.00
Dessert modifiers	1	$0.70
One Side Option FCH	2	$2.00
Sales	21	$71.25
No Taxes		

Method	Totals
Cash	$71.25
Total	$71.25

Deposits	Totals
Net Cash	$71.25
Total	$71.25

Output To Receipt