CLOUD - Statistics Report

Introduction

The POS Statistics Report is used to compare.

This document will take you through all the concepts of the Back Office (or Back of House) component of the system.
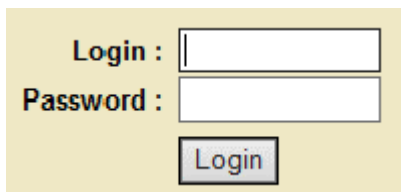
Logins

A LOGIN is a combination of a login (or username) and password. This is to allow access only to those people who are allowed to have access to your reports. This is a very important security issue. As POS can be connected to the internet, your LOGIN details will protect your system.

Your login is the same as it appears on your button on the POS system. Your password should be kept secret, changed regularly and have a combination of letters and numbers.

To Login to the System

Open Internet Explorer.

POS should be set to the Home Page and the Point of Sale options as well as the Login and Password field should appear on the screen.

Click the **Login** field.
Enter your **Login**, press **Tab**.
Enter your **Password**.
Click the **Login** button.

If you get it wrong, the system will allow 3 attempts.

Do not panic if you get it wrong 3 times.
Just close Internet Explorer and try again.

Each time you open Internet Explorer you get 3 attempts.

The login and password are not case sensitive, but if you have used a combination letters and numbers then the **Num Lock** may be turned off which is sending direction arrows instead of numbers. Check that the **Num Lock** light on your keyboard is on.

The system will, on a regular basis,` ask you to change your password. When you do this only your password will change the Login name will stay the same.

Do not share your login details with others, this is a security risk. If you want others to have access then you can create a separate login and password for them to use.

Internet Explorer will offer to remember login and passwords for you. We recommend that you do **not** use this feature as it will render the security useless in a shared office environment.

As a further security measure POS will time out your Back Office session after a period of time, if you do not continue to use it. This is why you may be asked to login again if you leave the system idle and then try to run a report.

Main Menu

Once you have successfully logged in, the POS Menu will always be displayed. Here is a quick description of the Main features of this page.

Across the top of the Page the system will display the name of the page (middle large font), the name of the store (top right corner), the day and date (lower right).

Clicking on **POS** (top left) will always return you to this page.

The far left column is the Sidebar Menu. The Sidebar Menu has a list of links that will change the way the system behaves. For example: adding Staff or removing a product you no longer want to sell.

Reports

POS has been designed so that you don't need to print a report at all. The system will store and can report on anything today, tomorrow, 6 months or 3 years from now. Everything is date based.

The actual number of and position of the reports may change in the Menu with future updates. What will not change is how to generate a report and what you can do with it.
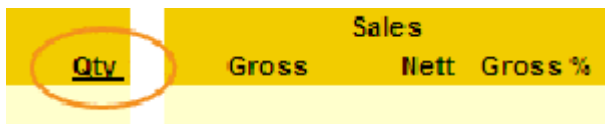
Refreshing

All reports in the system are calculated when they are asked for. This means that changes in the data (such as more sales) will be reflected each time you ask for the report. A good way to see this behaviour is to run a Sales Report like a Daily Summary for today, wait a couple of minutes (make some more sales) and click the **Refresh** button in Internet Explorer. This will make the system recalculate the report and include any new sales made in between the two reports.

Hyperlinks

Many reports also have hyperlinks. All of POS is effectively a web page. One of the features of web pages is that they can be linked in many ways to each other. (This is why it is called a 'web', since the links do not have to be ordered and they can jump from any page to any page). Hyperlinks are used on Reports in POS to indicate that more information is available. This is normally a "drill-down" process (into more detail) but it could also be a "drill across" (into related data).

A Hyperlink can be spotted on a report by the underline. Also when you move your mouse over the hyperlink it will change to a pointing hand. Clicking on the hyperlink will start the calculation of that report. You can return to the current report by clicking on the **Back** button in Internet Explorer. (When clicking Back, the report is not recalculated; your computer picks up the copy it had before).

cut and Paste

Reports in POS have been designed so that they are compatible for **Word** and **Excel**. Reports can be cut and pasted into either of these programs and they will retain their formatting and hyperlinks.
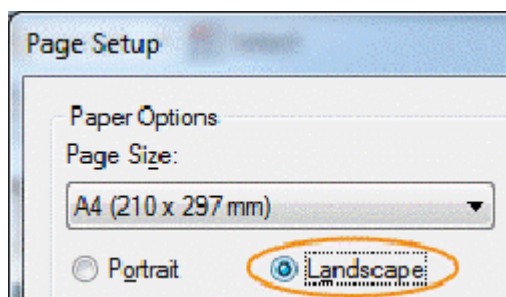
Printing

At some time you will want to print the reports. Internet Explorer does the printing, not POS so you need to be aware of how Internet Explorer handles printing.

Firstly Internet Explorer will use your default printer settings. Where possible we have designed Reports to be best printed in Portrait but not every report can fit that way. If a report needs to be printed landscape you will need to change the Print Options in Internet Explorer, POS cannot tell Internet Explorer which way to print the report.

To Change a report to landscape

Select **File | Page Setup.**

Change the Orientation to **Landscape**

Click **OK**.

Once you have printed the report, don't forget to change it back to Portrait otherwise the next report will be in landscape as well.

When you do print a report, it may look slightly different to the format on the screen. This is because the screen is a different width to the printed page. POS has built-in report rules to change column widths to fit.

POS Standard Reports

Name	Description
Sales Report	Provides a full summary of products sold between the date range selected.
Time Report	Displays the Quantity and Dollar value of goods sold broken down into time intervals.
Trend Report	Determined by the date selected, displays that day of the week and the days of the previous six (6) weeks sales numbers broken into selectable time intervals. Useful to calculate stock and staff required for each day
Cumulative Trend Report	Same as the Trend Report, however, tallies numbers through the day.
Product Ranking	Displays the most popular product in order of the quantity sold or dollar amount.
Product Companion	More detailed summary of products sold between the date range selected.

Name	Description
Operator Summary	Break Down of the total numbers of orders processed, total sales and average sales for each staff member.
Operator x Product Analysis	After selecting a product, shows all the staff members that have sold that particular product.
Operator x Product Summary	After selecting a staff member, calculates total products sold and dollar amount generated.
Demographics Summary	Based on a POS optional extra - Shows dollar sales broken up by customer demographics
Demographics Analysis	Based on a POS optional extra - Shows numbers of customers of each customer demographic type.
Customer Summary	Based on a POS optional extra - Summary on customers that have previously visited the store (e.g. Name, Postcode etc.)
Sales Comparison Report	Breaks down total sales, transactio count and average sales by week for two (2) selectable years. Allows you to compare or example this period to the same period last year or the year before.
KPI Weekly Report	Complete list of every week in the year with corresponding Net Sales and Average Sales.
Waste Analysis	Outlines waste numbers for all staff.
Older Journal	Lists all orders taken by all staff members between the date range selected.
Product Prices	Lists all product sales price.
Product Cost	Lists all product cost price.

To view any of these Reports:

1. Choose which one best suits your needs and select it from the lists from the "Point of Sale" menu once you have logged on;
2. Select the date or date range as requested along with any other filters that you may require *(Tip: the date will default to today's date)*
3. Click "Calculate Report" to view your results;
4. Should you need to print the report, simply select "Print" from the "File Menu".

Advanced Features

A very powerful feature is that you can run multiple copies of Internet Explorer on the same computer and run multiple reports at the same time. You can use this feature to run and compare reports for different periods.