Using POS Management Tools

Point of Sale is a critical step in the inventory management workflow.

Activity here drives purchasing behavior, staffing levels and pricing structures.

In this course, we will show you how to manage POS with the sales dashboard and explore the process of reviewing payment transactions.

We will also view and run reports.

Objectives

- Sales Dashboard
- Payment Transactions Viewer
- Sales Reports

Sales Dashboard

Daily, weekly, monthly, and annual review of sales data is necessary to measure the performance and productivity of your store.

The homepage displays the sales widget by default. You can use this panel for a quick overview of the day's sales. Use the tabs to display daily, weekly, monthly, and yearly sales data.

Hover over the graph's markers to view the overall sales at *that* specific point.

You will also find a link to the **Sales Dashboard** in this panel.

The **Sales Dashboard** displays the day's sales, profit dollars, profit percentage, transaction count, average sales, and average number of lines per transaction.

Use the tabs to view the weekly, monthly, and yearly graphs.

Tap the *Sales* graph to view the **Transactions** page.

The **Transactions** page displays all processed transactions based on your search criteria. Select a date range or a *specific* date from the drop-down menu.

You can use the available filters to narrow your results. Click **Search**.

The table displays the transactions from the date you've selected.

Click the *transaction number* to view the transaction *receipt* or select a transaction using the checkbox and click the **Form** button.

You can print or email the receipt if needed.

Click **Return to Transactions** to close the receipt.

Payment Transactions Viewer

Credit card and gift card tender activity should be reviewed for *every* business day.

This is important to spot duplicate or failed transactions. If overseen, it might cause register balancing issues or chargebacks.

From the main menu, select **Payments** and then **Dashboard**.

The **Dashboard** displays the selected store and the day's card transactions and other graphs that help monitor card payment transactions.

To review *all* transactions, select the **Transactions** sub menu.

Select the date range or a specific date from the **Transaction Date** drop-down menu.

You can use the other drop-down menus to narrow your search results.

Click **Search**.

You can use the **Maximize** icon to view only the table.

Filter the table by **All Processed**, **Approved**, **Declined**, or **Errors Only.**

The sum of the transactions listed is displayed *here* in **Totals**. Part of daily register balancing includes making sure *this* total matches your **Register Analysis**.

Select one, multiple, or all transactions using the checkbox and click the **View Transaction** button to view the details.

Dependent on your credit card processor, you can *void or reverse* a transaction here.

Click **Return to Transactions** to close the pop-up.

Export transactions using the **Export to Excel** button.

For more information, refer to the articles and videos in Help. You can search for content based on *your* specific credit card processor.

Sales Reports

Defining and enforcing point of sale procedures allows you to compile a wealth of *accurate* data in report form.

From the Home page, select **Reporting** and then **Sales.**

There are many pre-configured reports.

Let's look at the Category Sales Report.

Click the **Information** icon to view the report's parameters.

Tap the report to view its details.

You can choose to export, email, or print the report.

The **Summary** section displays Total Net Sales, Cost of Goods Sold, and Gross Profit.

Total Net Sales represents the *gross* sales minus any returns or discounts.

In **Detailed Report,** sales figures from each category and the related subtotals are displayed along with the number of transactions, net sales, and Cost of Goods Sold. Click *here* to edit the table view and display the columns you prefer.

You can also run a report from the **Report Selection** panel.

The parameters will appear based on the type of report you've selected.

Click **Run Now** to generate the report.

You can also choose to schedule the report.

In the **Settings and Output** pop-up, select a period, report format, the user who should receive the report, and a printer if applicable.

Click **Save**.

The **Schedule Task** page displays.

Enter a description and select a *scheduler* from the drop-down and *save*.

To learn more about scheduling tasks, refer to the articles and videos in Help.

Recap

Keeping an eye on sales activity is required for making informed business decisions.

In this course, we reviewed the sales dashboard and the payments menu.

We also reviewed and generated sales reports.

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