Running Propello Reports

Running and analyzing sales reports gives you the tools you need to manage cash and credit activity, adjust staffing needs, and keep an eye on department inventory movement.

In this course, we'll create, run, and schedule *sales* and *inventory* reports.

Objectives

- Sales Reports
- Inventory Reports

Sales Reports

Sales activities should be monitored to *detect* areas that may require changes or improvement.

From the main menu, select **Reporting** > **Sales**.

The **Sales** screen displays several pre-configured reports.

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

Tap the report to view it.

A summary along with the detailed report is displayed.

Use the available buttons to *export, mail, or print* the report.

You can schedule this report to run on a specific date or during a period.

All Scheduled Reports displays all the current scheduled reports and tasks in the **Scheduling** screen.

Create a report with different parameters in the **Report Selection** panel.

Select the report type from the **Report** drop-down menu.

Each report type renders a *different* set of sales data.

For this example, let's select **Sales Report.**

The parameters appear after the report selection.

Select the report *period* in the **Group By** drop-down menu.

Select a start and end date.

Select the applicable store or a store group.

You can select specific tenders or customers to filter the report output.

Choose sale, return, or both from the **Sales Type** drop-down menu.

Click **Run Now** to generate the report *or* you can choose to *schedule* the report.

Export, mail, or print the generated report using the available buttons.

If you choose to schedule the report, fill in the required fields in the **Settings and Output** pop-up and click **Save**.

Next, you are redirected to the **Schedule Task** screen.

Enter a description for the schedule and choose to run it as a stand-alone, just this one time, or run it as part of a group schedule.

Search for a scheduler or add a *new* scheduler *here*.

Click **Save** when you're done.

If you want to edit the schedule, you can find it in the **Scheduling** screen.

Inventory Reports

An inventory report can give you insight into items with negative or zero quantity on hand, identify items on order with a supplier or provide an inventory valuation for accounting purposes.

From the main menu, select **Reporting** and then **Inventory.**

The **Inventory Valuation** report is pre-configured.

Tap the report to view it.

In the **Report Selection** panel, select a report type from the drop-down menu.

Fill in the parameters and choose to run or schedule the report.

You can export the generated report in the desired file format.

Recap

Consistently generating and reviewing reports will help provide steady insight into sales activity and inventory status.

In this course, we created, generated, and scheduled sales and inventory reports.

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