

Viewing and Printing Reports

Viewing or Printing a Sales Report

1. Press **Reports Menu**
2. Press **Sales Reports**
3. View sales information. If a printout is desired press the **Print Sales Report** button.

Running End of Day Reports

1. Make sure there are not any open tickets by checking the Phone Order screen.
2. If open tickets are found, close tickets or save for a later date.
3. Close all cashier Sales Audits (no cash drawers are assigned) and enter all Audit deposits
4. Press **Daily Close** button (on *Managers Menu*)
5. Confirm physical cash matches the "Cash from Audits" amount.

(Below is a screen shot of what you should be looking at.)

The screenshot displays the 'Daily Sales Reports' interface. It is divided into several sections:

- Left Panel (Grey):** Lists various sales metrics with input fields and values:
 - Gross Sales: 953.62
 - Net Sales: 953.62
 - Voids: .00
 - Net Sales Tax: 78.67
 - Net Special Tax: .00
 - Net Liquor Tax: .00
 - Net Discounts: .00
 - Cash Deposit: 0.00
 - Non Cash Deposit: 0.00
 - Non Sales Revenue: .00
 - Refunds: 0.00
 - Cash to Account For: 1032.29
- Bottom Left Panel (Blue):** Lists audit-related metrics:
 - Cash From Audits: 1032.00
 - Bank Deposit 2: 0.00
 - Bank Deposit 3: 0.00
 - Bank Deposit 4: 0.00
 - Closing Deposit: 0.00
- Top Right Panel (Green):** 'Paid Outs' section with a list of items and values:
 - Chicken - 51100
 - Boneless - 51150
 - Seasoning - 51300
 - Soda - 51200
 - Groceries - 51900
 - Beer - 52000
 - Paper - 53000
 - Shortening - 51400
 - Dairy - 51600
 - Produce - 51500
 - Uniforms - 65200
 - R/M Equip. - 8010
- Bottom Center Panel (Yellow):** 'Daily Totals' section:
 - Total Voids: 0.00
 - Total Discounts: 0.00
 - Total Non Cash Tenders: 0.00
 - Total Bank Deposits: 1032.00
 - Total Paid Outs: 0.00
 - Deposits Paid In: 0.00
- Bottom Right Panel (Red):** 'Over / Short' section showing a value of -.29.
- Right Side Controls:** A vertical column of buttons: 'Keyboard', 'Erase', 'Close Daily Sales', and 'Exit'.

6. Press **Close Daily Sales** button.
7. Press **Yes** if you are sure.
8. Confirm the sales date.
9. Press **No** unless you want a Daily Sales Mix printout.
10. From the *Managers Menu* press **Reports Menu** and then **Daily Sales Summary**.
11. Select the date
12. **Print** the report, then press **Exit**.

13. Next press **Balance Sheet** item in the top menu.
14. Select the day's beginning and ending date, and press **Search**.
15. **Print** the report and press **Exit**.

End of Week

End of Week (EOW) should be run after Daily Close on Saturday, or the last day of your business week. Before cashiers are assigned to a Sales Audit the next morning, check to see that the EOW has been run.

Checking to see if an EOW has been run

1. Press **Reports Menu**
2. Press **Sales Reports**
3. No sales should be found. WTD sales should read "0.00".
4. If there are WTD totals on the report, you need to complete the End of Week.

Steps to Run an End of Week (EOW)

1. Press **Reports Menu**
2. Press **Weekly Close Out**
3. Weekly sales will be closed
4. Repeat the steps to view a Daily Sales Report (previous page) and verify there are not any current WTD Sales

Emailing Reports using MicroSale

MicroSale has the ability to email reports to any designated email address(s) using Outlook Express or any other Windows compatible POP email application. These documents will be sent as *.PDF attachments.

1. You will need an "always on" internet connection on the computer that you will be accessing the reports from.
2. You must setup an active Gmail account on that machine using Outlook Express, Outlook, Thunderbird, or any other Windows compatible email program.
3. In MicroSale, go to *Register Setup, Misc. Setup-Terminal Groups Etc*, and in the *E-mail Sales Data To* line, enter all email addresses that you would like reports to be sent to.
4. Press **Default Gmail** and it fills in some information automatically.

5. Change User Name and Password to your Gmail User Name and Password, and **Save**.

Each person on the Email list will get the “Daily Close”. If you execute other reports, such as “Close Time Records” for Payroll, that report will go to everyone on the Email list also.

Printing a Weekly Report

1. Press **Reports Menu**
 2. Press **Daily Sales Summary**
 3. Change the date to the week you wish to view.
 4. Once the week date has been chosen the report on screen will update and can be printed.
- ❖ There are also numerous weekly reports available on the top menu bar for Labor, Sales Mix, Sales by Period, etc.

Previewing a Labor Report (Weekly or Bi-Weekly)

1. Press **Reports Menu**
2. Press **Time Clock Reports**
3. Press **Preview Time Records**
4. Choose the dates to preview and press **Search**.
5. Preview the report and print if needed.