POS Audit reports

Available for FuturERS 3.24 >

Contents

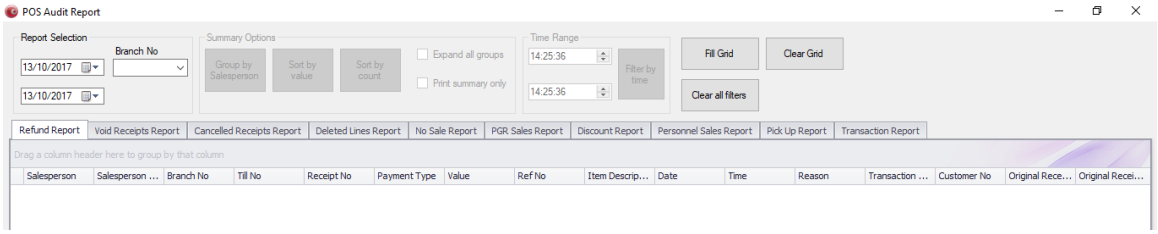
Overview of POS Audit Reports

The POS Audit Report's provide further analysis to be made on till transactions either locally in the branch or in head office for all branches.

The additional analysis that this report provides is;

- Refund Report
- Void Receipts Report
- Cancelled Receipt Report
- Deleted Lines Report
- No Sales Report
- PGR Sales Report
- Discount Report
- Personnel Sales Report
- Pick Up Report
- Transaction Report

The data included in this report is dependent on the report that you have selected.



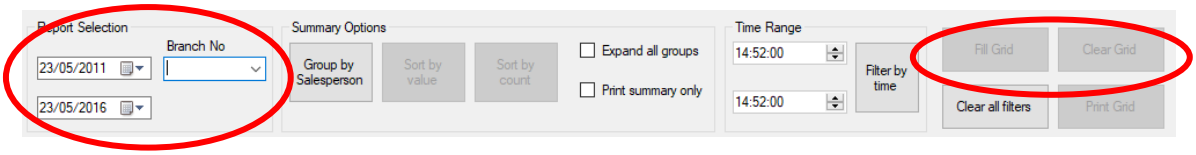
Please note: It is only possible to run one report at a time.

Important Notes on running;

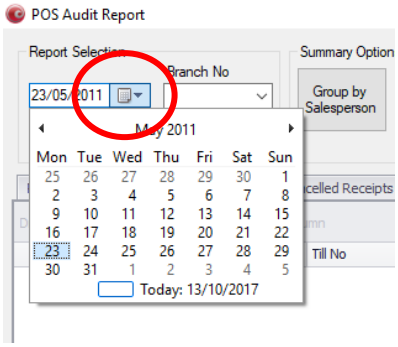
- If this report is to be run instore, then the branch must be running on an SQL database.
- Frame Network needs to be installed on any workstation that these reports are to be run on.

Basic filters for running each report

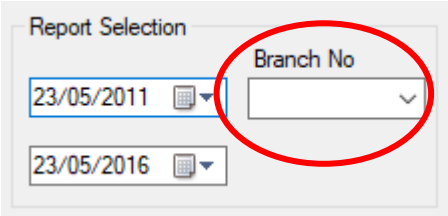
Each report uses the same header filters as basic filters for the data.



Report selection:

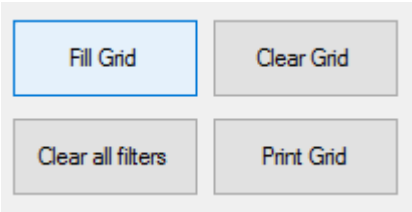


This allows a date range to be entered that analysis should take place between. It is possible to manually type in the date or to press the drop-down arrow to bring up a calendar to select from.



ONE branch number can also be added as a filter. If the branch number dropdown is left blank, the all branches will be included in the report.

Report generating and clearing buttons:



Fill Grid: Generate the report

Clear Grid: Clear the data from the report

Clear all filters: Clear any additional filters that have been added to the report. Is only used once the report has been generated

Print Grid: Print the report. This will only be available once you have generated your first report

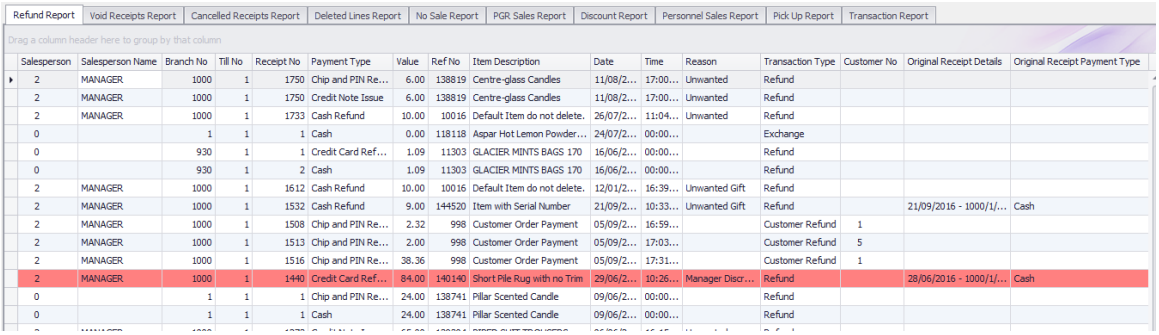
Report generating and examples

Refund Report

This report provides analysis on refunds that have been processed through the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Payment Type
    - Value
    - Ref No
    - Item Description
    - Date
    - Time
    - Reason
    - Transaction Type
    - Customer No
    - Original Receipt Details
    - Original Receipt Payment Type



Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Payment Type	Value	Ref No	Item Description	Date	Time	Reason	Transaction Type	Customer No	Original Receipt Details	Original Receipt Payment Type
2	MANAGER	1000	1	1750	Chip and PIN Re...	6.00	138819	Centre-glass Candles	11/08/2...	17:00...	Unwanted	Refund			
2	MANAGER	1000	1	1750	Credit Note Issue	6.00	138819	Centre-glass Candles	11/08/2...	17:00...	Unwanted	Refund			
2	MANAGER	1000	1	1733	Cash Refund	10.00	10016	Default Item do not delete.	26/07/2...	11:04...	Unwanted	Refund			
0		1	1	1	Cash	0.00	118118	Aspar Hot Lemon Powder...	24/07/2...	00:00...		Exchange			
0		930	1	1	Credit Card Ref...	1.09	11303	GLACIER MINTS BAGS 170	16/06/2...	00:00...		Refund			
0		930	1	2	Cash	1.09	11303	GLACIER MINTS BAGS 170	16/06/2...	00:00...		Refund			
2	MANAGER	1000	1	1612	Cash Refund	10.00	10016	Default Item do not delete.	12/01/2...	16:39...	Unwanted Gift	Refund			
2	MANAGER	1000	1	1532	Cash Refund	9.00	144520	Item with Serial Number	21/09/2...	10:33...	Unwanted Gift	Refund		21/09/2016 - 1000/1/...	Cash
2	MANAGER	1000	1	1508	Chip and PIN Re...	2.32	998	Customer Order Payment	05/09/2...	16:59...		Customer Refund	1		
2	MANAGER	1000	1	1513	Chip and PIN Re...	2.00	998	Customer Order Payment	05/09/2...	17:03...		Customer Refund	5		
2	MANAGER	1000	1	1516	Chip and PIN Re...	38.36	998	Customer Order Payment	05/09/2...	17:31...		Customer Refund	1		
2	MANAGER	1000	1	1440	Credit Card Ref...	84.00	140140	Short Pile Rug with no Trim	29/06/2...	10:26...	Manager Discr...	Refund		28/06/2016 - 1000/1/...	Cash
0		1	1	1	Chip and PIN Re...	24.00	138741	Pillar Scented Candle	09/06/2...	00:00...		Refund			
0		1	1	1	Cash	24.00	138741	Pillar Scented Candle	09/06/2...	00:00...		Refund			

4. Apply and further filters that you require

What does it mean if a transaction is highlighted red?

If a line is highlighted red, then it indicated that the payment type used in the refund does not match the payment type used in the original receipt if they have been linked.
In the example above, the customer originally paid with cash but the money was refunded on to a credit card.

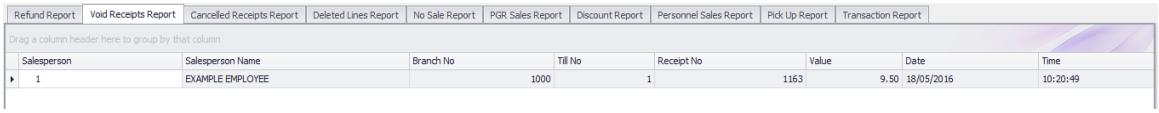
Void Receipts Report

This report provides analysis on voided receipts that have been processed through the till. This is a receipt which was processed fully through the till, however after being completed is cancelled.

- This report will be blank for most companies

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Value
    - Date
    - Time



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Value	Date	Time
1	EXAMPLE EMPLOYEE	1000	1	1163	9.50	18/05/2016	10:20:49

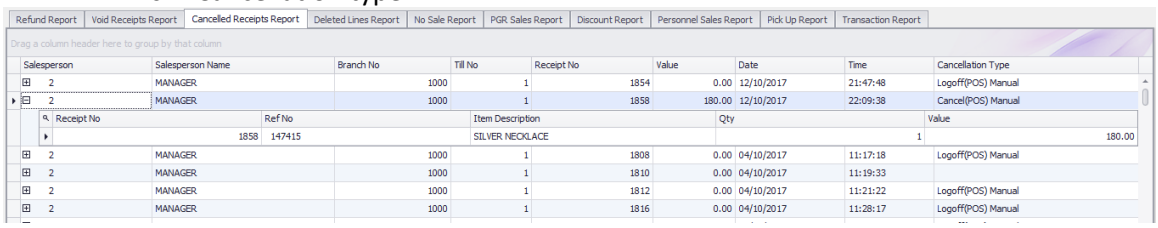
4. Apply any further features that you require

Cancelled Receipts Report

This report provides analysis on receipts that have been cancelled on the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Value
    - Date
    - Time
    - Cancellation type



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Value	Date	Time	Cancellation Type
2	MANAGER	1000	1	1854	0.00	12/10/2017	21:47:48	Logoff(POS) Manual
2	MANAGER	1000	1	1858	180.00	12/10/2017	22:09:38	Cancel(POS) Manual
2	MANAGER	1000	1	1808	0.00	04/10/2017	11:17:18	Logoff(POS) Manual
2	MANAGER	1000	1	1810	0.00	04/10/2017	11:19:33	
2	MANAGER	1000	1	1812	0.00	04/10/2017	11:21:22	Logoff(POS) Manual
2	MANAGER	1000	1	1816	0.00	04/10/2017	11:28:17	Logoff(POS) Manual

Receipt No	Ref No	Item Description	Qty	Value
1858	147415	SILVER NECKLACE	1	180.00

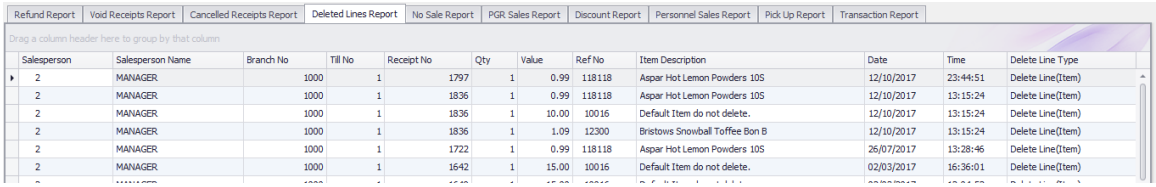
4. Apply any further features that you require

Deleted Lines Report

This report provides analysis on lines that have been deleted from a transaction on the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Qty
    - Value
    - Ref No
    - Item Description
    - Date
    - Time
    - Delete Line Type



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Qty	Value	Ref No	Item Description	Date	Time	Delete Line Type
2	MANAGER	1000	1	1797	1	0.99	118118	Aspar Hot Lemon Powders 10S	12/10/2017	23:44:51	Delete Line(Item)
2	MANAGER	1000	1	1836	1	0.99	118118	Aspar Hot Lemon Powders 10S	12/10/2017	13:15:24	Delete Line(Item)
2	MANAGER	1000	1	1836	1	10.00	10016	Default Item do not delete.	12/10/2017	13:15:24	Delete Line(Item)
2	MANAGER	1000	1	1836	1	1.09	12300	Bristows Snowball Toffee Bon B	12/10/2017	13:15:24	Delete Line(Item)
2	MANAGER	1000	1	1722	1	0.99	118118	Aspar Hot Lemon Powders 10S	26/07/2017	13:28:46	Delete Line(Item)
2	MANAGER	1000	1	1642	1	15.00	10016	Default Item do not delete.	02/03/2017	16:36:01	Delete Line(Item)

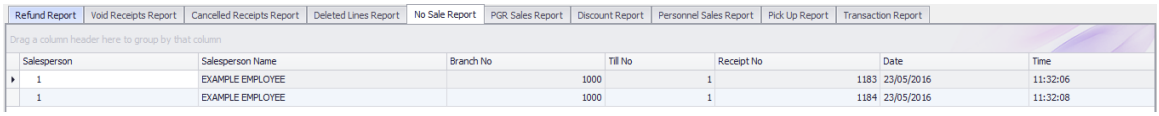
4. Apply any further features that you require

No Sale Report

This report provides analysis on no sales that have been processed through the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Date
    - Time



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
1	EXAMPLE EMPLOYEE	1000	1	1183	23/05/2016	11:32:06
1	EXAMPLE EMPLOYEE	1000	1	1184	23/05/2016	11:32:08

4. Apply any further features that you require

PGR Sales Report

This report provides analysis on PGR Sales (e.g. department sales) that have been processed through the till. This means that the transaction is not linked with a Futura Reference number on the system.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Value
    - Date
    - Time
    - Scanned Barcode
    - PGR
    - PGR Description

Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Value	Date	Time	Scanned Barcode	PGR	PGR Description
2	MANAGER	1000	1	1645	1.00	23/02/2017	12:02:49		1	FOOD VAT
2	MANAGER	1000	1	1647	1.00	23/02/2017	12:03:34		1	FOOD VAT
2	MANAGER	1000	1	1649	1.00	23/02/2017	12:04:52		1	FOOD VAT
2	MANAGER	1000	1	1505	1.16	05/09/2016	13:16:06		998	Customer Order Payment
2	MANAGER	1000	1	1511	2.00	05/09/2016	17:02:36		998	Customer Order Payment
2	MANAGER	1000	1	1514	38.36	05/09/2016	17:30:25		998	Customer Order Payment
2	MANAGER	1000	1	1469	249.99	11/08/2016	15:29:32		998	Customer Order Payment
1	EXAMPLE EMPLOYEE	1000	1	1398	30.00	24/06/2016	12:26:16		999	Product Group without Ref.
1	EXAMPLE EMPLOYEE	1000	1	1103	4.00	18/02/2016	16:44:00		14	FLOWERS
1	EXAMPLE EMPLOYEE	1000	1	1093	0.99	03/02/2016	09:55:02		998	Customer Order Payment

4. Apply any further features that you require

Discount Report

This report provides analysis on discounts that have been processed through the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Unit Original Value
    - Value
    - Unit Discount Value
    - Item Description
    - Ref No
    - Date
    - Time
    - Reason
    - Discount Type

Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Unit Original Value	Value	Unit Discount Value	Item Description	PGR No	Ref No	Date	Time	Reason	Discount Type
7	SALES ASSISTANT	1000	1	1180	20.00	7.50	2.50	Sil Wall Decorative Frame K42	10	105477	23/05/2016	11:29:48	No Reason	Line Discount
7	SALES ASSISTANT	1000	1	1180	20.00	7.50	10.00	Sil Wall Decorative Frame K42	10	105477	23/05/2016	11:29:48	No Reason	Line Discount
6	REDUCED TOUCH	1000	1	1177	20.00	10.00	10.00	Sil Wall Decorative Frame K42	10	105477	23/05/2016	11:28:09	No Reason	Line Discount
6	REDUCED TOUCH	1000	1	1195	40.00	36.00	4.00	V neck T-Shirt	28	138192	23/05/2016	12:28:01	Promotion	Receipt Discount
2	MANAGER	1000	1	1798	10.00	8.00	2.00	Default Item do not delete.	999	10016	27/09/2017	23:45:30	Staff Discount 20%	Receipt Discount
2	MANAGER	1000	1	1797	10.00	8.00	2.00	Default Item do not delete.	999	10016	27/09/2017	23:44:51	Staff Discount 20%	Line Discount
2	MANAGER	1000	1	1543	15.00	14.00	1.00	Default Item do not delete.	999	10016	29/09/2016	13:22:46	No Reason	Receipt Discount
2	MANAGER	1000	1	1455	15.00	14.00	1.00	Default Item do not delete.	999	10016	14/07/2016	14:22:00	No Reason	Receipt Discount
2	MANAGER	1000	1	1374	10.00	9.00	1.00	Default Item do not delete.	999	10016	22/06/2016	17:41:45	No Reason	Receipt Discount
2	MANAGER	1000	1	1366	10.00	9.00	1.00	Default Item do not delete.	999	10016	22/06/2016	12:17:28	No Reason	Receipt Discount
2	MANAGER	1000	1	1338	10.00	9.00	1.00	Default Item do not delete.	999	10016	21/06/2016	11:59:37	No Reason	Receipt Discount

4. Apply any further features that you require

What does no discount reason mean?

A line will show as 'No Reason' due to one of the following reasons;

a) You have your till set-up so the staff do not need to capture a reason
b) You have promotions set up without a reason code in the following modules on your system; Promotion Qty & Price, Promotion Mix & Match, Promotion on Total, Discount Rules.

Personnel Sales Report

This report provides analysis on transactions that have been linked to a Personnel Address.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Employee No
    - Employee Name
    - Payment Type
    - Item Description
    - Ref No
    - Qty
    - Unit Value
    - Total Value
    - Date
    - Time
    - Transaction Type

Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Employee No	Employee Name	Payment Type	Item Description	Ref No	Qty	Unit Value	Total Value	Date	Time	Transaction Type
2	MANAGER	1000	1	1483	3	SUPERVISOR	Cash	Aspar Hot Lemon Powders 10S	118118	1	0.99	0.99	23/08/2016	12:56:12	Sale
2	MANAGER	1000	1	1543	3	SUPERVISOR	Cash	Default Item do not delete.	10016	1	14.00	14.00	29/09/2016	13:22:46	Sale
6	REDUCED TOUCH	1000	1	1196	1	EXAMPLE EMPLOYEE	Cash	Dazzle Duck Picture Book	95105	1	0.99	0.99	23/05/2016	12:29:02	Sale

4. Apply any further features that you require

Please Note: The use of this report is dependent on how you capture staff sales. If you apply a staff discount, without attaching a personnel address (in the same way that you would a customer address) to a transaction, then this report will not generate any information.

Pick Up Report

This report provides analysis on pickups, drop-offs and POS Reports carried out on the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Salesperson
    - Salesperson Name
    - Branch No
    - Till No
    - Receipt No
    - Date
    - Time
    - Value
    - Type
    - Comments

Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time	Value	Type	Comments
2	MANAGER	1000	1	1851	12/10/2017	17:19:52	0.00	Pick Up	
2	MANAGER	1000	1	1855	12/10/2017	21:49:10	100.08	Pick Up	
2	MANAGER	1000	1	1856	12/10/2017	21:49:23	190.00	Pick Up	
2	MANAGER	1000	1	1856	12/10/2017	21:49:23	0.00	POS Report	
2	MANAGER	1000	1	1859	12/10/2017	21:59:17	0.00	Pick Up	
2	MANAGER	1000	1	1860	12/10/2017	21:59:41	180.00	Pick Up	
2	MANAGER	1000	1	1860	12/10/2017	21:59:41	0.00	POS Report	
2	MANAGER	1000	1	1762	20/09/2017	13:57:26	10.00	Pick Up	

4. Apply any further features that you require

Transaction Report

This report lists the transaction type of every transaction put through the till.

To generate;

1. Enter date and branches filters
2. Press the [FILL GRID] button
3. The following fields will be populated:
    - Date
    - Time
    - Branch No
    - Till No
    - Receipt No
    - Salesperson
    - Salesperson Name
    - Transaction Type
    - Payment Type
    - Qty
    - Value
    - Unit Original Value
    - Unit Discount Value
    - Shorts/Overs
    - Return
    - Void
    - Sales Ref Type
    - Ref

Refund Report | Void Receipts Report | Cancelled Receipts Report | Deleted Lines Report | No Sale Report | PGR Sales Report | Discount Report | Personnel Sales Report | Pick Up Report | Transaction Report

Drag a column header here to group by that column

Date	Time	Branch No	Till No	Receipt No	Salesper...	Salesperson N...	Transaction Type	Payment Type	Qty	Value	Unit Original V...	Unit Discount V...	Shorts/Ov...	Return	Void	Sale Ref Type	Ref
04/01/...	12:3...	1000	1	1084	1	EXAMPLE EMP...	Pickup	Non-existing Payment T...	0	0.00	0	0	0	No	No	Cancel(Pickup) Ma...	
04/01/2016	12:3...	1000	1	1085			Info	Non-existing Payment T...	0	0.00	0	0	0	No	No		
04/01/2016	12:3...	1000	1	1085	1	EXAMPLE EMP...		Non-existing Payment T...	0	-10.00	0	0	0	No	No		
04/01/2016	12:3...	1000	1	1085	1	EXAMPLE EMP...	Payment	Cash	0	0.00	0	0	0	No	No		
04/01/2016	12:3...	1000	1	1085	1	EXAMPLE EMP...	Payment	Cash Refund	0	10.00	0	0	0	Yes	No		
04/01/2016	12:3...	1000	1	1086	1	EXAMPLE EMP...	Logoff	Non-existing Payment T...	0	0.00	0	0	0	No	No	Logoff(POS) Manual	
04/01/2016	12:3...	1000	1	1087			Info	Non-existing Payment T...	0	0.00	0	0	0	No	No	Comment	
04/01/2016	12:3...	1000	1	1087	1	EXAMPLE EMP...	Pickup	Cash	0	-10.00	0	0	0	No	No		
04/01/2016	12:3...	1000	1	1087	1	EXAMPLE EMP...	Pickup	Outpayment	0	-10.00	0	0	0	No	No		
04/01/2016	12:3...	1000	1	1088			Info	Non-existing Payment T...	0	0.00	0	0	0	No	No	Comment	
04/01/2016	12:3...	1000	1	1088	1	EXAMPLE EMP...	POS Report	AMEX EFT	0	0.00	0	0	0	No	No		

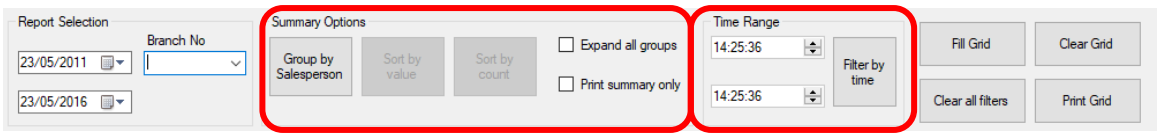
4. Apply any further features that you require

Additional filters in the header

For the following examples, this report will use the No Sale Report to demonstrate further filter possibilities.

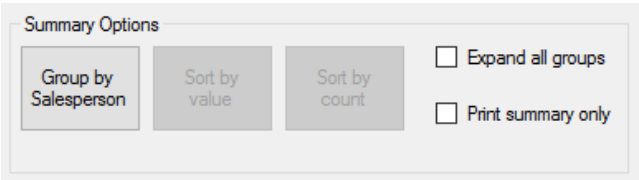
Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
1	EXAMPLE EMPLOYEE	1000	1	1183	23/05/2016	11:32:06
1	EXAMPLE EMPLOYEE	1000	1	1184	23/05/2016	11:32:08
1	EXAMPLE EMPLOYEE	1000	1	1069	23/12/2015	10:00:29
1	EXAMPLE EMPLOYEE	1000	1	1070	23/12/2015	10:00:33
1	EXAMPLE EMPLOYEE	1000	1	1072	23/12/2015	10:01:22
1	EXAMPLE EMPLOYEE	1000	1	915	15/08/2015	00:00:00
1	EXAMPLE EMPLOYEE	1000	1	480	03/09/2014	22:07:40
1	EXAMPLE EMPLOYEE	1000	1	427	12/08/2014	12:12:30
2	MANAGER	1000	1	237	06/01/2014	17:16:19
2	MANAGER	1000	1	238	06/01/2014	17:16:20

Each report uses the following headers available within the header of the report. These are only available for use once the report has been generated;

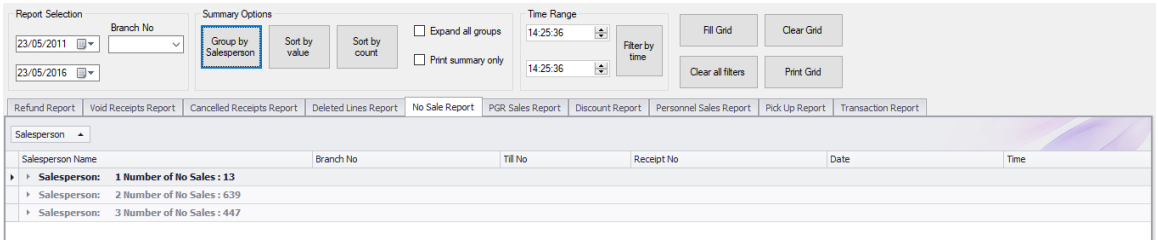


Summary options:

This allows you to roll up data by the following options;

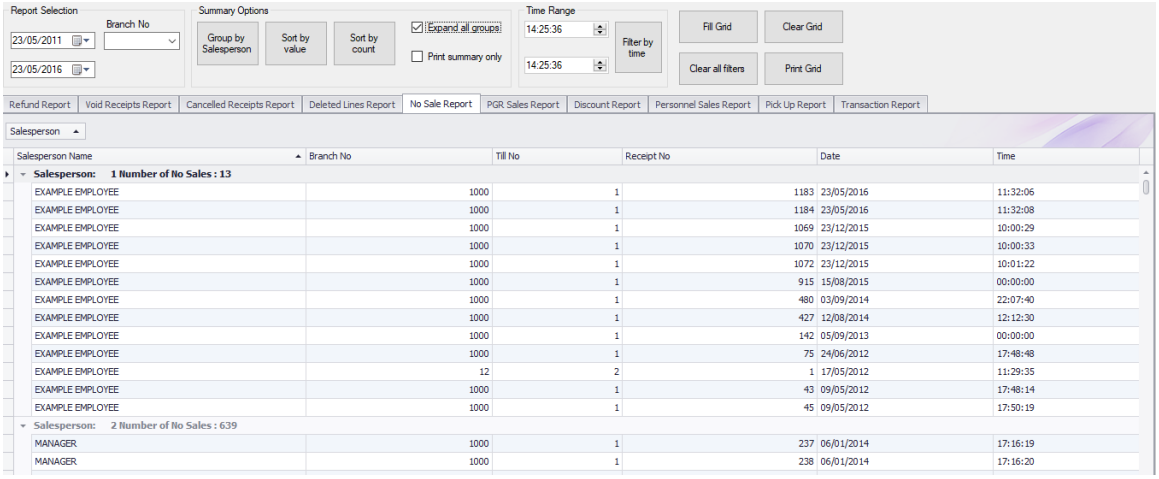


Group by Salesperson: Total all transactions by salespersons. There will be one line per salesperson.
Please note: When this is applied, the button will be surrounded by a blue box.



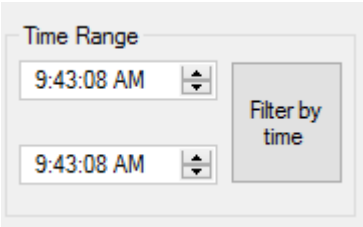
Sort by Value and Sort by Count: Once the "Group by Salesperson" option has been selected, the following boxes will then be made available to sort the list by.

Expand all Groups: The sub total by salesperson remains, however the detail of each transaction is now made visible again underneath.



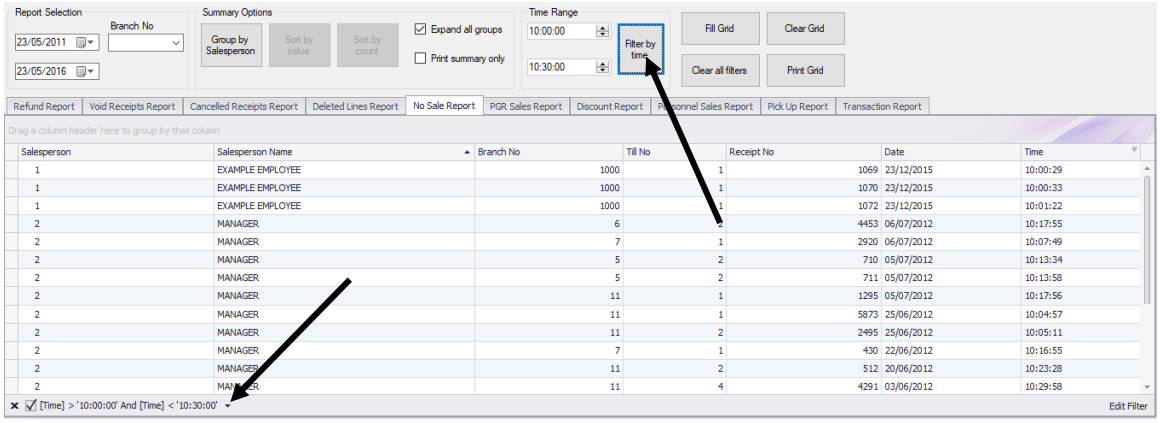
Time range:

This becomes available once the report is generated.



This allows a time range to be entered for analysis. It will default to the present time on your workstation.
To change the time, either manually type in the field, or select the digits that you would like to change and use the arrows buttons.
To apply this filter the “Filter by Time” button must be pressed.

Once it has been applied, the button will be surrounded by a blue box and there will be a filter apply line at the bottom of the report.



Please note: The time period used is dependent on your workstation settings. This means it can be run as a 12-hour clock or a 24-hour clock.

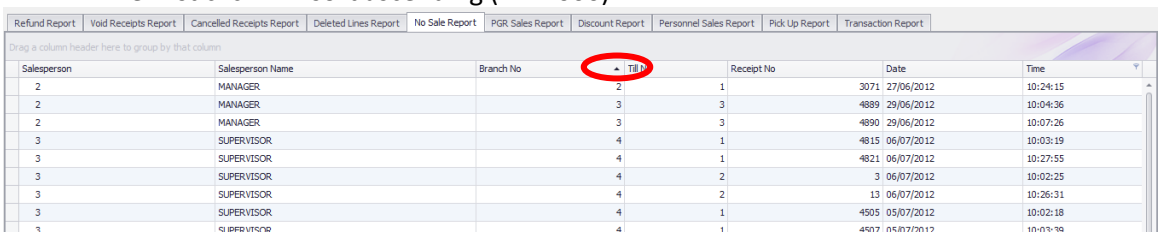
Additional filters in the columns

Within the actual report, it is also possible to apply further filtering on certain columns.
The options include;

Simple column ascending or descending sort

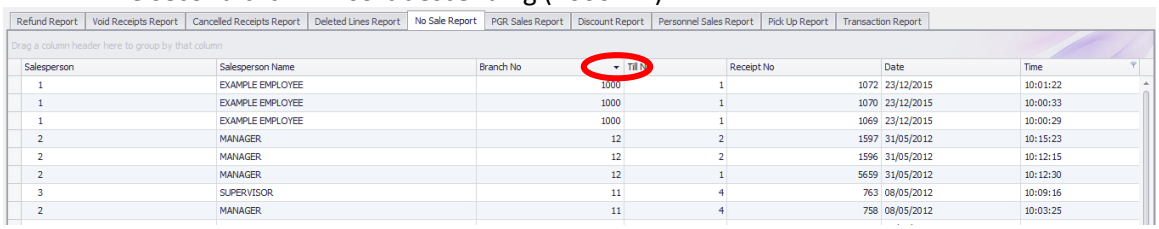
This can be done by simply doing a left hand click on a column that you would like to sort the data by.

The first click will sort ascending (1 > 1000)



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
2	MANAGER	2	1	3071	27/06/2012	10:24:15
2	MANAGER	3	3	4889	29/06/2012	10:04:36
2	MANAGER	3	3	4890	29/06/2012	10:07:26
3	SUPERVISOR	4	1	4815	06/07/2012	10:03:19
3	SUPERVISOR	4	1	4821	06/07/2012	10:27:55
3	SUPERVISOR	4	2	3	06/07/2012	10:02:25
3	SUPERVISOR	4	2	13	06/07/2012	10:26:31
3	SUPERVISOR	4	1	4505	05/07/2012	10:02:18

The second click will sort descending (1000 > 1)

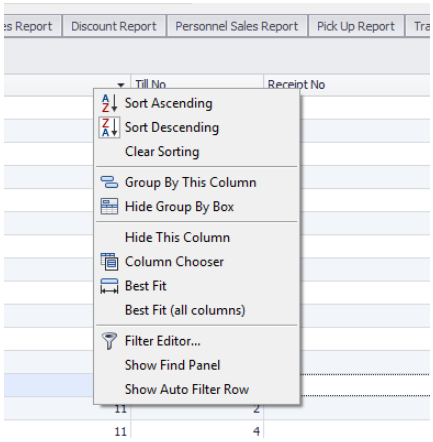


Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
1	EXAMPLE EMPLOYEE	1000	1	1072	23/12/2015	10:01:22
1	EXAMPLE EMPLOYEE	1000	1	1070	23/12/2015	10:00:33
1	EXAMPLE EMPLOYEE	1000	1	1069	23/12/2015	10:00:29
2	MANAGER	12	2	1597	31/05/2012	10:15:23
2	MANAGER	12	2	1596	31/05/2012	10:12:15
2	MANAGER	12	1	5659	31/05/2012	10:12:30
3	SUPERVISOR	11	4	763	08/05/2012	10:09:16
2	MANAGER	11	4	758	08/05/2012	10:03:25

The third will return to ascending.
It is only possible to sort by one column at a time. If you click on another column, the report will only be sorted by that column.

Further detailed column filtering

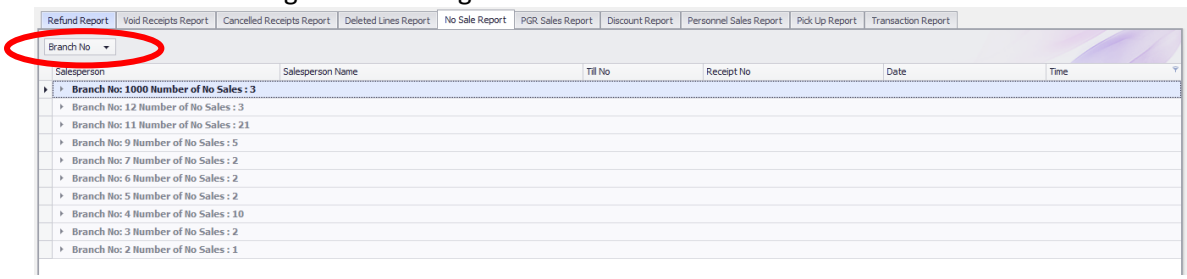
Further detailed filters can be applied by doing a right-hand click in the column (try clicking over the name), which are similar to excel filters.



Examples of some of these are on the next pages using the Branch No column as the filter.

- **Group by this column**

This groups the report in a similar way to the “Group by Salesperson”.
The column you have decided to use will be pulled into the top of the report and is available to click to sort ascending or descending.

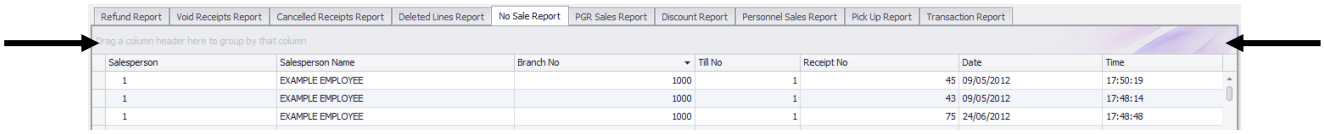


It is possible to clear the filter by clicking and holding on the column, then dragging it to where you would like it to appear in the report.

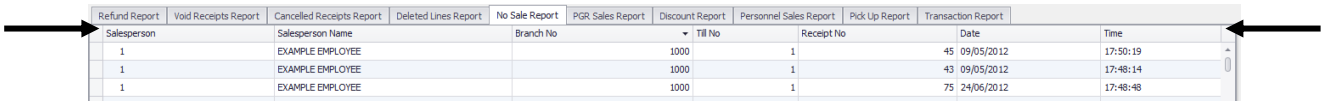
- **Hide Group by Box**

This will remove the drag column header box above the report;

Visible



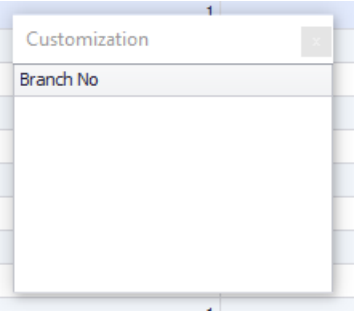
Hidden



- **Hide this column**

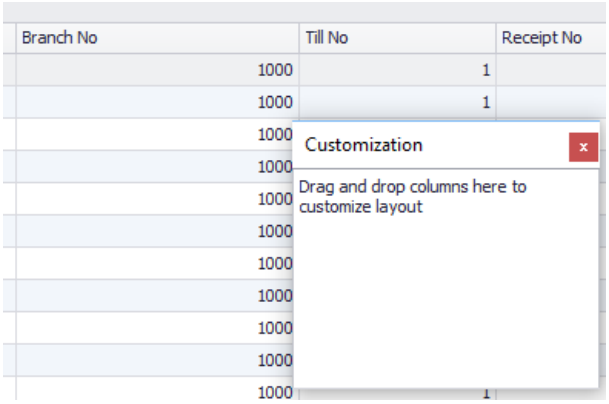
This will hide the column from the report. Please note that the Branch No column is not visible

- **Column chooser**



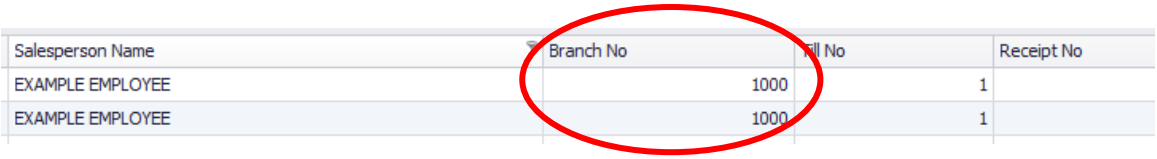
This will bring up the customization screen. Any additional column that are available (but not visible in the report) will be listed here.

They can be added to the report by double clicking, or clicking, holding down and dragging to where you would like it to appear in the report. The option will then be removed from the list.

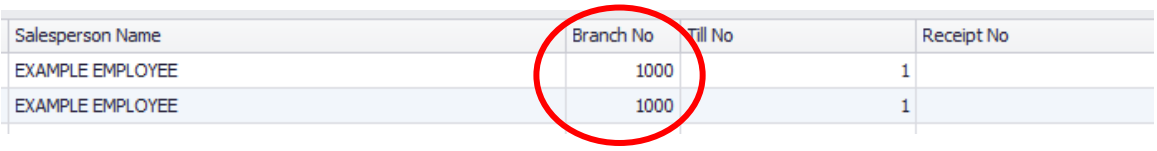


- **Best Fit**

This will take a column from being either too big or small for the data it contains;



And resize the column to the data it contains.

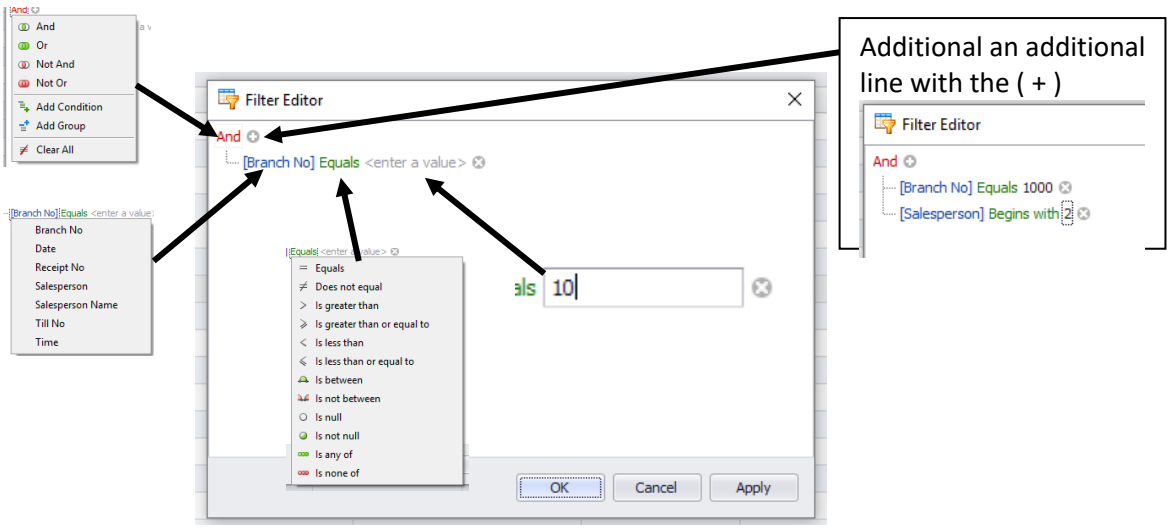


- **Best Fit (All Columns)**

Similar to 'Best Fit' but will apply it to all columns and apply the logic for the width of the page also.

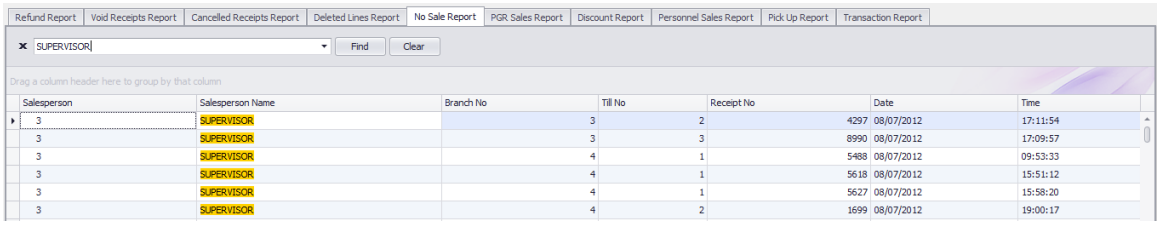
- **Filter Editor….**

This will bring up a Filter Editor window which allows you to enter a string of more detailed filters on a column. By clicking on each entry, you can bring up a list of options to choose from.



- **Show Find Panel**

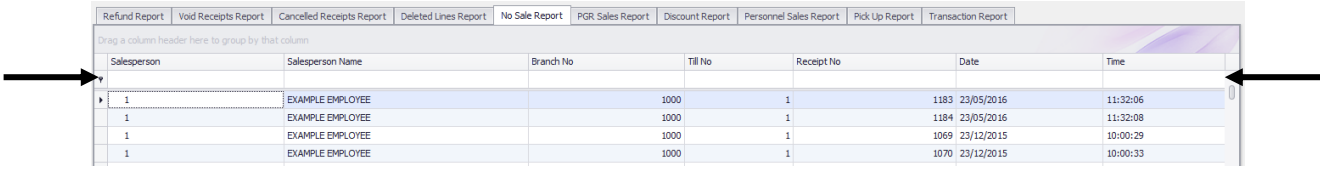
This will bring up a box which enables you to enter information that you would like to find the report. When [FIND] is selected, the only entries with this information will appear AND it will be highlighted yellow. Press [CLEAR] to remove the filter.



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
3	SUPERVISOR	3	2	4297	08/07/2012	17:11:54
3	SUPERVISOR	3	3	8990	08/07/2012	17:09:57
3	SUPERVISOR	4	1	5488	08/07/2012	09:53:33
3	SUPERVISOR	4	1	5618	08/07/2012	15:51:12
3	SUPERVISOR	4	1	5627	08/07/2012	15:58:20
3	SUPERVISOR	4	2	1699	08/07/2012	19:00:17

- **Show Auto Filter Row**

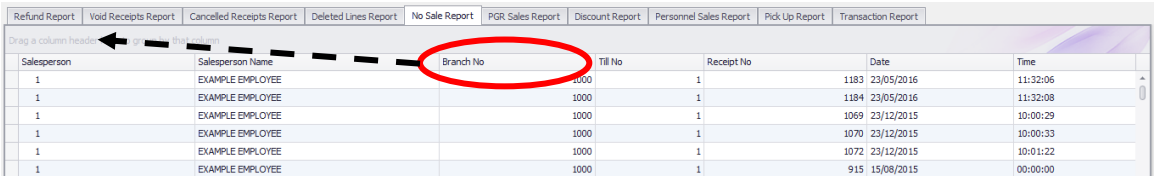
This adds an additional line below each column header which allows you to type in exactly what you would like to find and filter by in that column

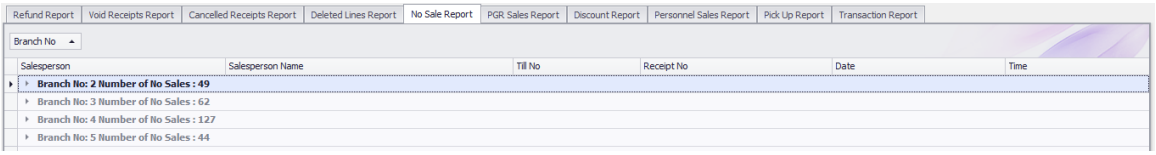


Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
1	EXAMPLE EMPLOYEE	1000	1	1183	23/05/2016	11:32:06
1	EXAMPLE EMPLOYEE	1000	1	1184	23/05/2016	11:32:08
1	EXAMPLE EMPLOYEE	1000	1	1069	23/12/2015	10:00:29
1	EXAMPLE EMPLOYEE	1000	1	1070	23/12/2015	10:00:33

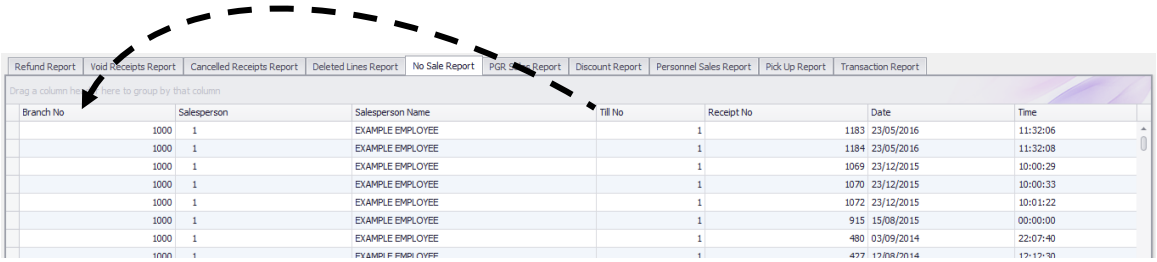
Simple column drag and drop

The area that is visible (or can be made visible) above the report allow you to do a simple click, drag and drop on a column.



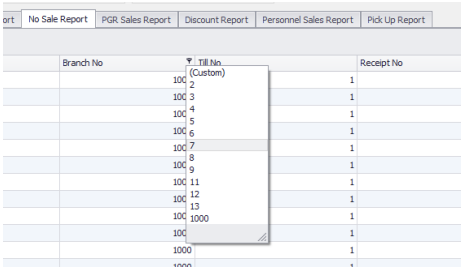


By using the logic, you are also able to move the columns into the order that you would like to view the information in. e.g. Branch No first.



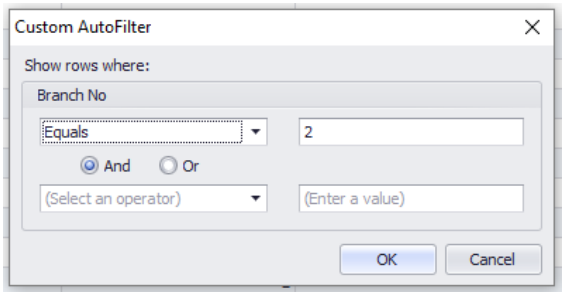
Simple column option filter

By clicking on the 'funnel' in the top right-hand corner or a column header, you can bring up a list of field values that you are able to filter the report by. (E.g. for 'Branch No' it will ring up a list of the branch number currently available in the report.



You can click on either one value that you would like to view the data for.

OR

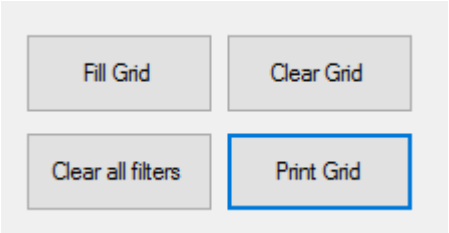


Press the (Custom) option to enter a more specific filter on these values.

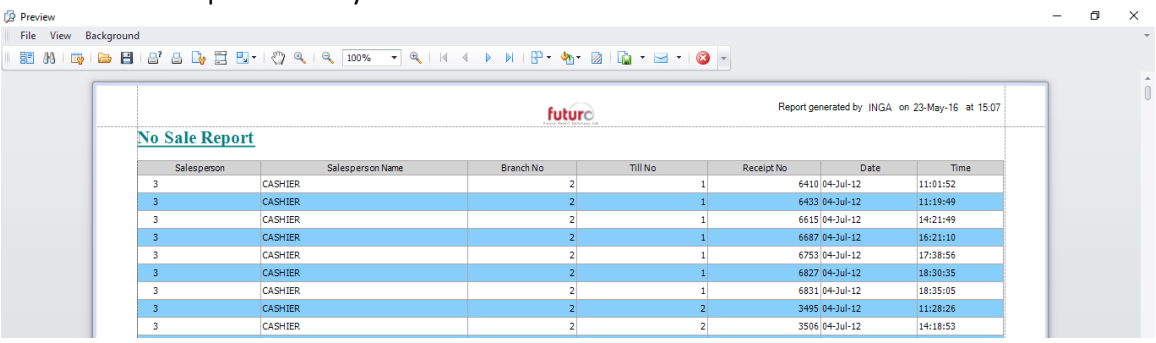
Please note: You are only able to see the 'funnel' when you hover over a column heading where it is not already applied.
If you can see it without hovering the cursor over the heading, then there is already a filter applied to this column.

Print options

You can print the report by pressing the [PRINT GRID] button

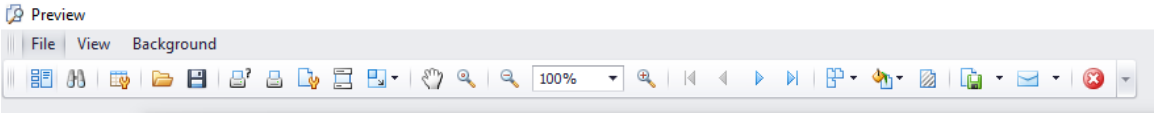


This will create a preview for you to view on screen



Salesperson	Salesperson Name	Branch No	Till No	Receipt No	Date	Time
3	CASHIER	2	1	6410	04-Jul-12	11:01:52
3	CASHIER	2	1	6433	04-Jul-12	11:19:49
3	CASHIER	2	1	6615	04-Jul-12	14:21:49
3	CASHIER	2	1	6687	04-Jul-12	16:21:10
3	CASHIER	2	1	6753	04-Jul-12	17:38:56
3	CASHIER	2	1	6827	04-Jul-12	18:30:35
3	CASHIER	2	1	6831	04-Jul-12	18:35:05
3	CASHIER	2	2	3495	04-Jul-12	11:28:26
3	CASHIER	2	2	3506	04-Jul-12	14:18:53

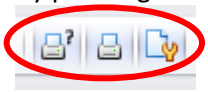
From here, you have different options that you can choose from for you print output using the icons across the top of your window.



Please Note: If you hover over the icons, a yellow box will appear to provide a heading for the icon.

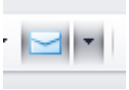
To print to a printer:

By pressing one of the printer options, you can print the report on to a piece of paper.



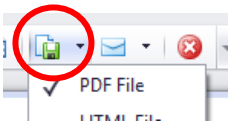
To send via email:

By pressing the envelope, you are able to save the report to an email. By pressing the dropdown arrow, you are able to choose the file output.



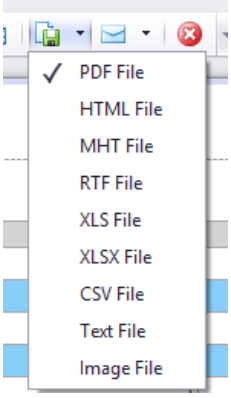
To save as a .PDF:

By clicking on this icon, it will provide you with a list of format options that you could save you report in. The first option is a PDF file.

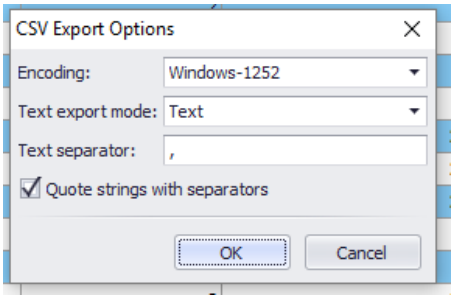


To save to Excel:

By clicking on this icon, it will provide you with a list of format options that you could save you report in. There are options for XLS, XLSX, CSV and Text files.



Depending on what option you pick, you will be presented with a window for further setting control.



You will need to then open the file in Excel. This may need to be done through the 'Import Data From Text' wizard.