

Dashboard Reporting



As of version **12.9**, Cash Register Express now supports a new reporting feature that allows you to quickly and easily see the sales information. You can select 2 different dates to compare the sales data in easy to read graphs and charts.

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Important Notes:

- **CRE version 12.9 is required in order to use this feature.**
- **When installing the patch, you may receive a prompt to allow an application through windows firewall. Select Public & Private Networks and click ok.**

Revision History

Document Version	Date	Author	Description of Changes
1.0	April 16, 2018	MP	1 st Release
2.0	July 24, 2018	JC	Update Screenshots

Accessing Dashboard

 <p>The screenshot shows a yellow box labeled "Manager" and a blue box labeled "Options" below it.</p>	<ol style="list-style-type: none"> 1. With CRE open select the Manager or Options button. Enter the Administrative ID & password.
 <p>The screenshot shows the "Permissions" menu with "Reports" highlighted in a red box. A red circle with the number "2" is next to the "Display Reports" dropdown menu, which is also highlighted in a red box.</p>	<ol style="list-style-type: none"> 2. Employees must have the Display Reports Permission to use this feature.
 <p>The screenshot shows the CRE Dashboard menu with various options. A red box highlights the "Administrative" option (labeled "5") and the "CRE Dashboard" option (labeled "O").</p>	<ol style="list-style-type: none"> 3. Select Administrative [5] followed by CRE Dashboard [O].
 <p>The screenshot shows the CRE Dashboard interface with various charts and data points. The "Daily Comparison" section shows Sales at \$6,451.89 and Cost at \$5,093.26. The "Hourly Net Sales" chart shows a peak in the afternoon. The "Weekly" section shows Sales at \$37,116.00 and Labor vs Sales at 18.17%. The "Monthly" section shows Sales at \$175,257.89 and Labor vs Sales at 3.85%. The "Yearly" section shows Sales at \$1,857,110.86 and Profit Margin at 80.68%.</p>	<ol style="list-style-type: none"> 4. CRE Dashboard will now open in a new window.

Dashboard Reporting Section Explanation

Below is a breakdown and explanation of each of the different sections within the CRE Dashboard.

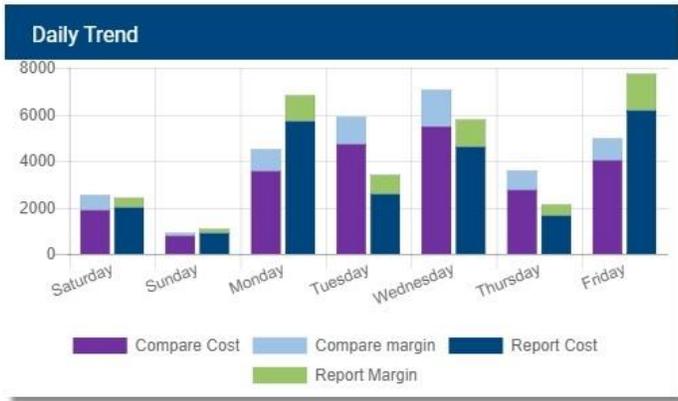
<p>Report Date: 05 / 17 / 2017 Compare Date: 04 / 13 / 2016</p>	<p>In the top Right Hand corner, you have 2 dates to change:</p> <p>Report date: The sales information from this date will be displayed on the different reports in Dashboard.</p> <p>Compare Date: This date's sales information will be compared to the report date's sales information on the Day Comparison, Hourly Net Sales, Daily Trend, & Monthly Trend reports.</p>
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Day Comparison					
Sales \$6,461.89 <small>down -\$607.54 from prior period</small>	Cost \$5,093.26 <small>down -\$408.81 from prior period</small>	Gross Profits \$1,368.63 <small>down -\$198.73 from prior period</small>	Profit Margin 21.18% <small>down -0.99% from prior period</small>	Labor Cost \$233.07 <small>down -\$64.48 from prior period</small>	Labor vs Sales 3.6% <small>down -0.60% from prior period</small>

Day Comparison: This is used compare the Report Date's sales information against the Compare Date's sales information. It will compare the Total Sales, total Item Costs, Gross Profits, Total Labor Costs, and Labor costs vs sales percentage from the report date to the compare date. The values will show in green if the report date's Total Sales & Gross Profits are higher than the compare date and red if they are lower. The Item Cost, Labor Costs, and Labor vs Sales % will show in green if they are lower than the compare date and red if they are higher. The difference between the 2 dates will be shown below the reported values.



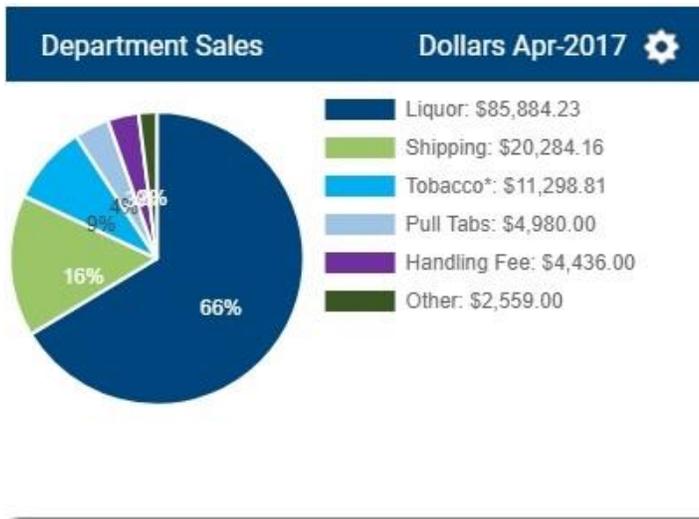
Hourly Net Sales: This shows the item costs and profit in a bar graph for the hours where sales information is recorded. It will also display the comparison date's item costs and profit next to the report date's sales information.



Daily Trend: This shows the item costs and profit over a seven day period. The graph will start with the earliest day of the week in the calendar year from either the report date or compare date.



Monthly Trend: This will show the item costs and profit of each month in the selected report date's year and compare date's year.



Department Sales: This shows the total sales of the top 7 selling departments in a pie chart from the selected report date. All other departments are group into an "Other" portion of the chart. This can be changed to show the sales data for total sales of items in \$ or quantity sold. It can also be changed to show the sales data from the selected report day, 7 day week from the selected report date, Month of the selected report date, or entire year by selecting the gear icon and choosing the desired **time frame**.



Top 5 Selling: this will show the top 5 selling items in your inventory. This can be changed to show the sales data for total sales of items in \$ or quantity sold. It can also be changed to show the sales data from the selected report day, 7 day week from the selected report date, Month of the selected report date, or entire year by selecting the gear icon and choosing the desired **time frame**.

Currently Clocked In Employees	
John T. Doe	04/16/2018 15:45:58

Currently Clocked In Employees: This will list the employees that are clocked in, their job code, and their clock in time. The information that is displayed here is dependent on what is entered into the Personal Information tab of the employee maintenance screen for each employee.

If first name or last name are blank, it will show the **display name**.

Weekly	02/19 - 02/26
Sales:	\$4,893.15
Cost:	\$4,140.97
Gross Profits:	\$752.18
Profit Margin:	15.37%
Labor Cost:	\$319.53
Labor vs Sales:	6.53%

Monthly	2018/Feb
Sales:	\$144,749.52
Cost:	\$115,534.91
Gross Profits:	\$29,214.61
Profit Margin:	20.18%
Labor Cost:	\$8,409.33
Labor vs Sales:	5.81%

Yearly	2018
Sales:	\$435,319.55
Cost:	\$349,841.01
Gross Profits:	\$85,478.54
Profit Margin:	19.64%
Labor Cost:	\$23,492.25
Labor vs Sales:	5.40%

Weekly, Monthly & Yearly Totals: These three sections will display Total Sales, Total Item Costs, Gross Profits, Total Labor Costs, Labor costs vs sales percentage, and Profit Margin from the report date. The Weekly section will show the information from a

7 day period starting at the selected report date. The Monthly will show the sales data from the beginning of the month to the end of the month from the selected report date month. Yearly will show the sales data for the entire year of the selected report date year.