



MicroSale
Report Guide

Introduction

This manual will walk you through key tips and provide the most efficient ways to monitor your data.

Whether you are running a quick service or table service operation, it is important to ensure your employees' run their closeout reports, verify their sales/tips entered, and collect the cash owed to the restaurant.

It is imperative to confirm the close out runs and your batch settles. While you can set the system to automatically close at the end of the night and automatically settle your credit card batch, you need to double check in the morning to ensure it went through. If the closeout did not run, make sure you close it prior to entering any sales for the following business day.

Monitoring and analyzing your data is imperative to the success of your business

MicroSale has hundreds of reports at your disposal. However, these are the most important reports for you to use every day.

1 Sales Report Dashboard

Start and end your day with this report

- This report is a quick way to verify a successful closeout from the night before. Each new day starts your numbers at \$0.00
- At the end of the day (before the closeout), it shows your key performance metrics such as a summary of sales, payment types and discounts



Reports Menu > Sales Reports

2 Daily Audit Report

This report is generated after the closeout. It provides hourly sales, itemized discounts, tender types, labor by job title and a summary of sales



Reports Menu > Daily Sales Summary > Daily Audit Report

3 Balance Sheet

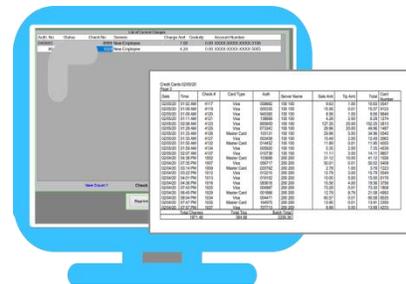
This report is generated after the closeout. It helps balance the products sold to the payments collected



Reports Menu > Daily Sales Summary > Balance Sheet

4 Batch Report

- The batch report provides an itemized list of each record in your credit card batch before the batch settles. You can edit tips if necessary before settling.
- After settlement, the onscreen list clears and the report prints/emails.



Managers Menu > Credit Card Menu

5 Individual Daily Time and Sales Report

This report provides an itemized look at your employees' time in/time out, labor dollars and tips. Choose the current day to see who worked today. If 'Out Time' is blank for an employee, it means they are still on the clock or forgot to clock out



Reports Menu > Time Keeping Reports > Individual Time and Sales Report

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About MicroSale Reports

As you get familiarized with MicroSale reports, you will notice that there are variations of the same information to meet different goals. Typically a handful of reports in each section will provide all of the data you need.

Viewing PDF reports

To view on screen reports, the terminal or back office computer must have a Reports Printer enabled in Register Set Up > Terminal Configuration > Register Options > Printing/Cash Drawer. Tick the box for **“Send Reports to Office Printer”**

Product Costs

For reports involving product costs, “0.00” is shown if the costs are not inputted in the system. While it is not necessary to include costs in the software, you will maximize the benefits of the reporting features. Or, these costs are automatically inputted with the use of the Inventory module.

To Add Costs: Managers Menu > Menu Maintenance > **Menu Items and Pricing** (or) Managers Menu > Menu Maintenance > **Pricing and Number Available**

Labor Costs

For Labor Cost Percentages to calculate, you must have Pay Rates inputted. While it is not necessary to include pay rates in the software, you will maximize the benefits of the reporting features.

To Add Pay Rates: Managers Menu > Employee Maintenance > **(submenu) Employee Maintenance** > add pay rates next to the employee's job title > **Save**

Date Range Calendar

The Date Range Calendar is used for historical reports. The calendar prompt is a quick way to know that the selected report is generated on closed sales (historical sales). You can choose to run a report for any range of days or select the same day twice.

March 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	29
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 3/25/2020

Select Starting Date: 02/25/2020

Select Ending Date: 03/25/2020

Run Report

Select Week To Date

Select Period To Date

Exit

Using the Date Range Calendar:

- 1 Make sure the **Starting Date** is highlighted (before clicking/touching the calendar)
- 2 Click/touch the **Ending Date** on the calendar (the date inserts in the field)
- 3 Click/Touch **Run Report**

Understanding ‘Period to Date’:

A 13-period calendar splits the year into 13 four-week periods rather than 12 months of varying lengths. A 13 period calendar is useful for accounting purposes. MicroSale automatically generates the 13-period calendar starting on the first day of your business's fiscal year. Depending on when you start your week (for example many restaurants start on Monday rather than Sunday), that first day in January is the start of the 13-period cycle and increments exactly 4 weeks.

Emailing Reports

You can have reports automatically email after the nightly closeout. The recipients are specified in register options. Reports are emailed as a PDF attachment with the report name as the subject line. You can also manually email reports to a group of individuals using 'group reports'.

MicroSale gives restaurant managers the convenience of emailing important sales information. Virtually all reports generated in MicroSale are available for email (sends as a PDF attachment).

The following reports may be emailed automatically at the end of the day (sending during the daily close out).

[Please see setup here.](#)

- | | |
|---------------------------|-----------------|
| ✓ Sales Mix (Product Mix) | ✓ Balance Sheet |
| ✓ Hourly Sales | ✓ Batch |
| ✓ Meal Period | ✓ Department |
| ✓ Sales (Daily Close Out) | ✓ Void Report |
| ✓ Daily Summary | ✓ Serving Times |

To email reports, you must have a report printer (or virtual printer) installed. [Please see setup here.](#)

Audits and Details

An Audit tracks all sales activity for a specific person, group, and/or cash drawer. Audit reports are used to balance employees' payments and/or cash drawers and track employee performance. An audit must be used for any employee that enters orders/accepts payments in the system. Each transaction is tracked on the employee's audit.

Audits and Details at a glance

Term	Description
Audit Procedures	Employee Audits are generally used to help balance the cash drawer or server bank and correct errors at an isolated level before chasing shortages/imbbalances at the time of close out.
Audit History	The report is useful when you need to go back and view individual audit summaries. The Audit History gives concentrated information only on individual employees' audits.
Daily Audit Report	The Daily Audit Report is the most commonly used report in MicroSale. It is a daily breakdown of a day's sales by various areas. The report allows management and operators to analyze a daily recap of sales with comparisons to last year, labor, and forms of payment in a quick snapshot view.
Driver Report	Driver Reports are used with Delivery. The Drive Report is useful for drivers to see their sales, money owed to the restaurant and tips.
Server Reports	<i>Server Reports are used in Full Service/Bar settings only.</i> Server Reports are used to view audits, sales averages, voids, tips, sales mixes and more.
Transaction Review	The Transaction Review provides detailed financial information for an individual employee, voids, tenders, and check components. This information can be used to track an employee's sales performance, find user errors, and pinpoint check details.

Audits in Quick Service

A **Cashier Audit** is linked to a specific employee and a specific terminal with a cash drawer attached. If a terminal has two cash drawers attached to it, then it can accommodate two **Cashier Audits** at the same time, each assigned to a different employee. Cashiers can only ring up sales and collect payments at the terminal where their Audit was assigned and can only access their own cash drawer. Other employees can only use the Time Clock at a terminal if they are not assigned to the Audit and cash drawer. Managers have full access to the cash drawers.

Starting a Cashier's Audit

(Quick Service and Cashier Environment Cashier Stations)

📍 Managers Menu > **Sales Audit** (upper left corner)

- 1 From the **Sales Audit** button, press the first button, **Not Assigned**
- 2 Scroll through the list and select the appropriate employee
- 3 Enter the starting amount in the drawer and select **Start Audit**
- 4 You'll be exited back to the ID screen and the cashier's name is assigned to the register (you can see this assignment on the top right corner of the ID screen)
- 5 The cashier can now login and place orders

Closing a Cashier's Audit

📍 Managers Menu > **Sales Audit** (upper left corner)

- 1 Select the employee's audit that you need to close
 - 2 When prompted to close the audit, select **Yes**
 - 3 Once this is done, it will put you back on the main ID screen. It will say "not assigned", replacing the employees name
 - 4 Go back to the Managers Menu and select **Sales Audit**
 - 5 Press the bottom button that says **Enter Cash Deposit**
 - 6 The screen displayed will show all audits open for the day
 - 7 Find the cashier's name for the audit that has just been closed, and touch anywhere in the row of information
 - 8 **Enter the cash deposit** and **Save** when finished
- The cash in drawer says how much *should* be in the drawer. The cash deposit is the actual cash that is on hand.
 - The beginning and ending drawer balance can be found on the individual cashier audits and on the audit history report

Cashier Audit Printout Report

Daily Cashier Audit		
Start Time:	9:46 AM	
End Time:	10:50 PM	
Date:	7/26/2020	
POS1	Maria Johnson	
<hr/>		
Beginning Drawer	150.00	
<hr/>		
Gross Sales	1213.60	
Void Sales	0.00	
Non Sales Revenue	0.00	
Net Sales Tax	101.66	
Net Discounts	0.00	
Net Sales	1213.60	
Account For	1465.26	
(includes beginning drawer amount)		
<hr/>		
Total Transactions	83	
No Sale	0	
<hr/>		
Tenders	Tend Amt	#
Cash	139.32	10
Amex	15.01	1
Discover	86.1	2
Master Card	52.12	3
Visa	1022.71	68
<hr/>		
Cash In Drawer	139.32	
<hr/>		
Cashier Errors	Type	Qty
Maria Johnson	Cancel Order	5
Maria Johnson	Cashier Correct	3

Audit Details

- Start and end time of the audit
- Date, register number assigned to audit and employee's name

Starting cash amount entered when the audit was opened

Account For

Total amount received at this register (including the beginning cash drawer amount)

This is net sales + gift cards redeemed + deposits + service charges + taxes + beginning drawer amount

Tenders (Payment Medias)

Itemizes types of payments collected; including credit card types, gift cards redeemed, cash and noncash tenders such as Uber Eats, House Accounts, etc.

Cash In Drawer

This is cash amount that should have been collected; excluding the beginning drawer amount. If you entered a beginning drawer amount, you owe that in addition to this amount. If your establishment accepts credit card tips, the tips entered are removed from this amount.

Optional Loss Prevention Setting

Tracks cancelled orders, cleared orders, and deleted items (tracks items before they are sent to the kitchen or finalized; these are not voided items). Cancel Order= Canceled payment on the payment screen; Cashier Correct=Deleted menu item

- 📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Quick Service > **Turn on error tracking for cashiers**

Reprint Cashier Audit

- 📍 Manager Menu > Sales Audit > Reprint Cashier Audit > Select Date > Run Report > Select All or Specific Audit > *Option to view on screen or print*

Audits in Full Service (Table Service & Bars)

A **Server Audit** is used for each employee who will be taking orders and payments including wait-staff, bartenders, managers, delivery drivers, and possibly hosts. Once a Full Service **Server Audit** is started, it can be assigned to a cash drawer at a specific terminal for access to the drawer. If a bartender is assigned to a cash drawer, payments collected from any checks closed at any other terminal will still be included on that bartender's Audit.

Allowing Servers to Start Own Audit

By default, an audit starts when a server/bartender clocks in and no action is needed.

Starting an audit without clocking in (only used for restaurants that do not use the integrated time clock):

If your restaurant does not use the time clock, you must manually start an audit before an employee can enter orders. Or, set the following option to have an audit started automatically.

Starting an audit without clocking in:

- 📍 Managers Menu > Register Setup > Terminal Configuration > **Full Service** > tick the option **"Tipped Employees can start their own audit without punching in"** > Press **Save**
- 1 When a servers logs into the order screen, it will prompt that an audit is required to begin a check
- 2 It will prompt "Do you want to start an audit at this time"? Select **OK**

Applying Tips (full service)

- 1 Log in with your server number and go to the **Server Menu**
- 2 Select **Apply Tip**
- 3 When prompted, select **Done** to display a list of all of your closed checks. Or, if you have the credit card slip, you can type in the check number
- 4 Touch the field **Tip Amount** and type in the tip
- 5 Press **Done** when finished
- 6 To verify that checks were not forgotten, Press Apply Tip again and press done without typing in a check number, this will show missing tips in RED

Note: You can print a chit with the tip summary information for the server to keep track of the applied tips

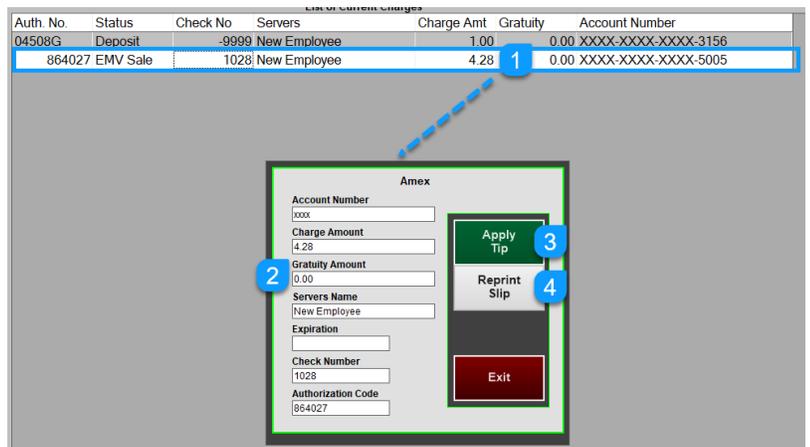
Managers Editing Tip Errors

Editing credit card tips

Credit card tips can be edited in the POS system prior to sending the batch to the processor. It's important for managers to thoroughly review each credit card slip and verify entered tip amounts prior to the end of the day.

📍 Managers Menu > **Credit Card Menu**

- 1 Find the appropriate row pertaining to the tip that needs to be changed and touch anywhere within the row
- 2 Touch in the box under 'Gratuity Amount', change the tip amount
- 3 Select **Apply Tip**
- 4 **Reprint Slip** if desired
- 5 **Exit** when completed (the batch will settle automatically after the closeout)



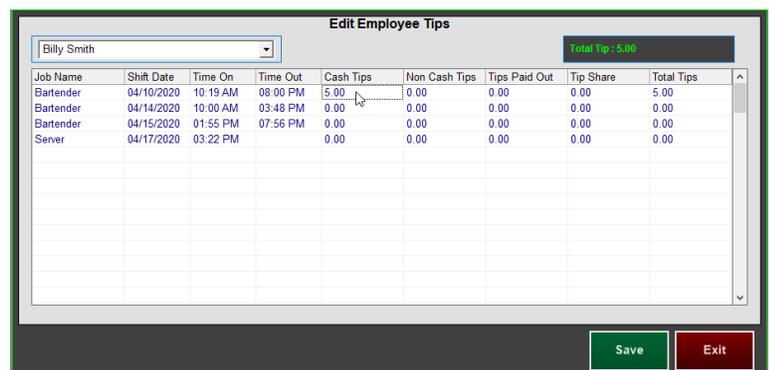
Editing cash tips

📍 Managers Menu > Time Clock Functions > **Edit Tip**

Cash tips are claimed at the end of an employee's shift (when the audit is closed or at clock out (depending on your register settings)). Credit card tips are automatically claimed.

If the wrong cash amount was claimed, a manager can go back and edit the amount.

- 1 Touch the drop-down and select the appropriate employee
- 2 Touch the **Cash Tips** field for the appropriate shift
- 3 Enter the new tip amount, and press the **Done** button on the number pad.
- 4 Review the new tip amount entered
- 5 Press **Save**



Closing and/or Printing a Bartender/Server Audit

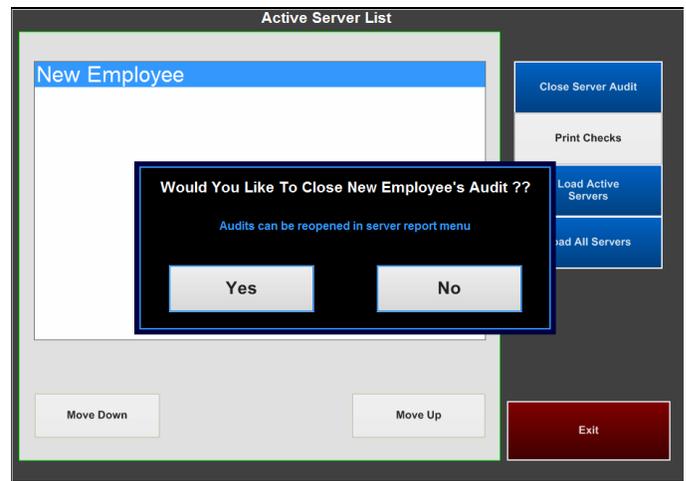
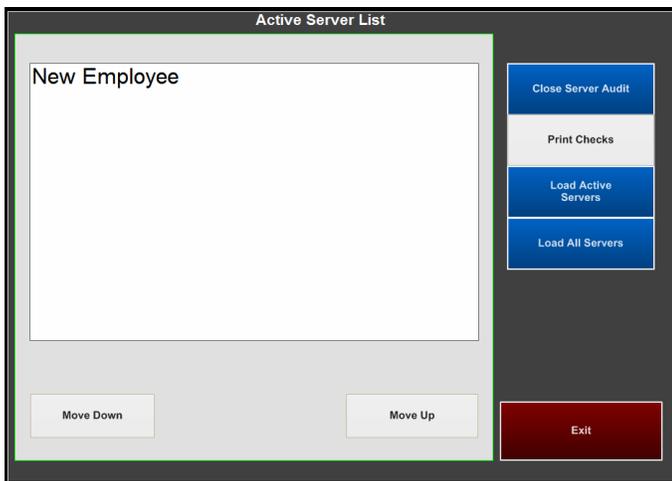
The Server Audit Report provides detailed financial information for an individual employee or a range of employees. The information can be used to balance an employee's bank, determine tips due, or track an Employee's sales performance.

📍 Order Screen > Server Menu > **Server Report**

- ! **If only managers are able to close server audits, the 'Server Report' button will only print the audit for the logged in employee. Printing the audit **does not** close the audit.**
- ! **Make sure the employee has entered their credit card tips before closing the audit.**

- 1 If you have access, The Server Report button takes you to the server reports menu.
- 2 Select **Server Audits** (top left button).
- 3 Select the employee's name from the *Active Server List*
- 4 Select **Close Server Audit**

- ! **If open checks are assigned to the audit, you **cannot** close the audit! Close the open checks or transfer them to another employee.**
- ! **When all checks are closed, it will prompt to verify that you wish to close the audit.**



Understanding the Active Server List:

Close Server Audit: This option will allow you to first print out the server's audit and then close it

Print Checks: Prints a detailed list of the server's checks.

Load Active Servers: Shows a list of all servers with an open audit.

Load All Servers: Shows a list of all servers with both open and closed audits

Server Audit Printout Report

At the end of an employee's shift, the employee or manager will print the audit report for the employee.

All **Credit Card** charges (including tips added), **Gift Card** charges, **House Account** charges, and any other non-cash tenders collected are deducted from the total due.

MicroSale deducts any **Deposits** or **Skims** that were collected from a cash drawer or from a server's bank and placed into the store's safe.

Tip Credit Card Fee chargeback is a small percentage of the employee's credit card tips collected by the store to cover the transaction fee that the store pays to their credit card processor. *This is an optional feature.*

MicroSale deducts any amount from the total due that was **Paid Out** of the cash drawer or server bank such as for returning can or bottle deposits or for any purchases made (beer keg deliveries, produce purchased from a local store, bags of ice, office supplies, etc.).

Sales taxes and surcharges are tracked separately from both Gross Sales and Net Sales.

Server Report		
Report For	: Donna Jones	
Report Period	: From 11:39 AM to 1:11:40 PM	
Report Date	: 8/28/2017	
Audit No.	: 1	
Payment Type	Amount	No.
Cash	841.51	14
Gift Card	25.00	1
Visa	169.50	4
MasterCard	19.75	1

Total Collected:	1055.76	20

This Total Includes Tips:		
Total Charged Tips:		44.65
Deposit Collected:		500.00
Tip Credit Card Fee:		3.80

Gratuity Charged:		40.69

Paid Out Name	Paid Out Amount	
Bottle Return	9.60	
BUD KEG	55.98	

Discount Name	Amount	Qty

Employee	13.24	1
Flyer Ad \$2 Off	6.00	3
General Discount	38.07	1

Open Check Sales		.00
Closed Check Sales		930.25
Non Sales Revenue		184.09
Gross Sales		1013.50
Total Net Sales		746.16

The "Audit No." or Audit number will always be "1" (one) unless the employee worked more than one shift in the same business day. If an employee works more than one shift in the same day, and the manager closes the first audit before starting a new Audit for the next shift, then this Audit number will increment to indicate that the same employee worked multiple shifts. If the first Audit is not closed, then the employee can just continue using the first Audit during their next shift. It is recommended to close the first Audit and start a new Audit for subsequent shifts only if the manager is going to collect the money from the first Audit, or switch out a cash drawer with a new starting bank for the next shift.

Gross Sales represents everything rung up by the employee including service charges, delivery fees, and gratuity added automatically to large groups, but it does not include credit card tips, credit card tip fee chargebacks, or sales tax, and it does not reflect discounts applied or voided transactions. Thus, the **Gross Sales** is an "inflated" figure that must be adjusted before it can be used to calculate the amount due.

Net Sales reflect the actual sales generated after the **Discounts** and **Voids** have been taken into account.

Non-Sales Revenue is the revenue collected for transactions that are not directly related to the sale of Menu Items. **Non-Sales Revenue** are *service charges, delivery fees, credit card convenience fees, gratuity added automatically to large groups of guests, deposits collected for future sales not yet rung up, deposits collected that will be returned later (bottle and can deposits), gift cards sold, and any other similar Paid Ins.*

\$ 1013.50	Gross Sales
- \$ 25.94	Voids
- \$ 57.31	Discounts
- \$ 143.40	Non-Sales Revenue - Income
- \$ 40.69	Non-Sales Revenue - Gratuity

= \$ 746.16	Net Sales

The **Total Sales Amount** is the total amount of payments that should have been collected and **DOES NOT** include tips.

= \$ 746.16	Net Sales
+ \$ 39.75	Sales Tax
+ \$ 2.50	Tax Surcharge (Sugar Tax)
+ \$ 3.80	Credit Card Tip Fee Chargeback
+ \$ 143.40	Non-Sales Revenue - Income (added back after calculating Net Sales)

= \$ 935.61	Total Sales Amount (Total Due)
-------------	--------------------------------

The **Total Sales Amount** (total due) less the **Non-Cash Tenders**, less any **Cash Collected By Others**, plus any other's **Additional Cash Collected**, less any **Paid Outs**, less any server **Deposits** or **Drawer Skims**, plus any **Tip Pool Amounts**, plus the **Beginning Drawer Balance** will equal the **Net Cash Due Amount** or the total amount of cash that should be in the cash drawer or server's bank.

The **Net Cash Amount Due** minus the **Beginning Drawer Balance** equals the amount of cash in the drawer that is part of the store's bank deposit.

Add the **Cash in drawer** amount to the **Deposits Collected** during the shift to calculate the total cash collected from this **Server Audit**.

Net Sales Tax	:	39.75
Discounts	:	57.37
Sugar Tax	:	2.50
Dine In	:	987.58
Count	:	18
Void Sales	:	25.94
<hr/>		
Total Sales Amount		935.61
Gratuity has been deducted (includes credit card fees)		
Non Cash Tenders		214.25
(includes Charged Gratuity)		
<hr/>		
Net Cash Due		488.81
(Additional Cash Closed Cash Closed Included) 93.36 (Less Cash Closed By Others) 54.75 (Tip out is included) 44.42 (paid outs have been deducted 65.85)		
<hr/>		
Amount Closed by Others		54.75
Additional Sales Closed		93.36
Beginning Drawer Balance		250.00
Net due includes beginning drawer balance		
No Sales		
<hr/>		
Total Tables		18
Total Customers		18
Customer Average		41.45
Avg Table T/O Min		1199.44
<hr/>		
Non Sales Items		
Bottle Deposit	144	14.40
0		
Gift Card	2	125.00
<hr/>		
Report at least 74.62 in Tips		
Server Tip Out Amount(s)		
Bartender	Not Collected	
Busser	40.17	
Barback	Not Collected	
Expeditor	4.25	
Host(ess)	Not Collected	
Total Tip Out Amount		44.42

If servers or bartenders have the ability to close checks for other servers or bartenders (not their own checks), then their **Server Audits** will show the **Additional Cash Closed Included** that is then added into the **Total Sales Amount** to be collected. Likewise, if any checks were closed by another server or bartender, then the **Server Audit** will show **Less Cash Closed By Others**, and this amount is then deducted from the total due. This amount will be included on the Server Audit for the server or bartender who closed the check(s) and actually collected the cash payment(s).

= \$ 935.61	Total Sales Amount (Total Due)
- \$ 25.00	Gift Cards Redeemed
- \$ 169.50	Visa
- \$ 19.75	MasterCard (non-cash tenders include tips applied)
+ \$ 93.36	Additional Cash Collected (cash collected from closing other servers' checks)
- \$ 54.75	Cash Collected by Others (checks closed by & cash collected by other servers)
- \$ 65.58	Paid Outs
+ \$ 44.42	Tip Pool Collected
- \$ 500.00	Deposit (skim from Drawer to Safe)
+ \$ 250.00	Beginning Drawer Amount
<hr/>	
= \$ 488.81	Net Cash Amount Due (includes beginning drawer amount)

If the **Tip Sharing** feature is active, the **Server Tip Out Amount(s)** prints on the **audit**. This feature tracks sales by Menu Department, and certain employees (server, bartender, etc.) tip out a predetermined percentage of their sales by Department to other employees working under certain job titles. If no employee with the assigned job title is clocked in, the job title shows "Not Collected". This example printout is for a bartender, so it shows the "**Bartender**" tip pool amount "**Not Collected**". Bartenders tip out to Bussers and Expeditors (in this example).

Optional print settings for the server audit

📍 Manager Menu > Register Setup > Terminal Configuration > Register Options > **Full Service** > Additional Options > The following are options you can enable or disable on the Sales Audit:

- Server/Bartender department sales prints on audit close
- Payment types print on audit close

Server Reports

Server Reports are used in Full Service and Bar settings only. In full service and bar settings, typically employees use server banking (keep track of their own bank) and/or bartenders share drawers and tabs. Server Reports offer additional insight into the employees' activity.

📍 Order Screen > Server Menu > **Server Report**

⚠️ If only managers are able to close server audits, the 'Server Report' button only prints the audit for the logged in employee.



Server Reports Menu

Server Audits	Server Income	Server Sales Mix
Close All Server Audits	Cash Deposit	Department Sales
Drawer Audits	Today's Server Payments	Category Sales
Change Dining Room Section	Non Cash Tip Pool	Payment Report
Reopen Closed Audit	Reprint Server Audit	Tip Share
Voids Today by Department	Voids Today By Detail	Exit

Close All Server Audits

The function allows a manager to quickly and easily close all server audits. This is convenient when closing the restaurant. If there are open checks or open tips, it will not allow you to close the audits.

Drawer Audits

The function allows a manager to view closed audits that were assigned to a cash drawer. It shows the gross sales, discounts, voids, cash in drawer, cash deposits, the over/short between those two totals, and charged tips. This is similar to the *Audit History* report.

Change Dining Room Section

****Must have Table Layouts enabled for this function****

The function is used for a restaurant with multiple floor plans and assigned sections.

Example: Jane is assigned to the PATIO floor plan, allowing this floor plan to populate automatically when she logs into the terminal. Gina then gets cut, switching Jane from the PATIO to DINING. *Select the server > select the section*

Reopen Closed Audit

This function allows a manager to reopen a closed server's audit. This could be because a server accidentally closed an audit or that the server had to go back on the floor. An audit can only be reopened on the same business day.

Voids Today by Department

This function prompts to choose an employee who has worked today. Select an employee's name to view the Voids Today by Department. *This is the same report offered in the Voids and Discounts section of this guide.*

Server Income

The Server Income report is used for financial filings. It includes tippable sales, cash and charged tips declared, and tip percentages.

Page 1							
Micro\$ale							
1221 W. Brandon Blvd.							
Server Tip /Sales Income 1/21/2012 to 1/21/2012							
Report Date 01/26/2012 02:41 PM Printed By Nancy Supervisor							
Server	Tip Sales	Cash Tips	Chg Sales	Chg Tips	Tip Pd Out	Total Tips	Chg Tip%
Billie Harris	431.51	25.00	205.27	35.00	0.00	60.00	17.05
Gina Williams	3.74	0.00	0.00	0.00	0.00	0.00	
Heather Heim	238.14	8.02	58.75	17.42	0.00	25.44	29.65
Jessica Landis	428.81	11.25	364.79	35.59	0.00	46.84	9.76
Latisha Heaverin	0.00	0.00	0.00	1.00	0.00	1.00	
Rebecca Kimber	281.16	15.00	242.57	20.74	0.00	35.74	8.55
Sarah Thurman	420.10	13.00	313.73	29.71	0.00	42.71	9.47
Taylor Bell	309.67	20.98	69.35	10.59	0.00	31.57	15.27
Totals	2113.13	93.25	1254.46	150.05	0.00	243.30	11.96

Tip Sales:	Excludes all sales that are non-tipped (i.e. Gift Cards and Phone Orders)
Cash Tips:	Claimed by your employees at the end of their shift
Chg Sales (Charged Sales):	Total credit card sales
Chg Tips (Charged Tips):	Credit card tips claimed
Tip Pd Out (Tip Paid Out):	Tip outs and shared tips
Total Tips:	Cash Tips+Chg Tips
Chg Tip%:	Total tip percentage based on the Tip Sales in column one. (Tip Sales/(Cash tips+Chg Tips) <i>This percentage needs to be over 8%</i>)

Cash Deposits

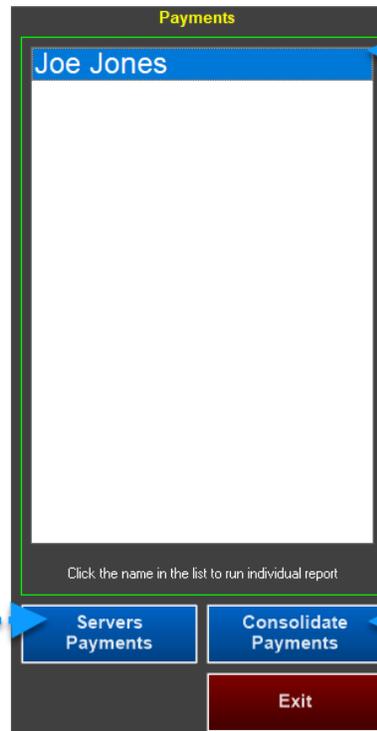
This report shows cash deposits by drawer assignment and gives you the ability to record the total cash in the drawer, and to skim the drawer in the event that there's too much cash in the actual cash drawer. Touch the field to record the cash deposit or drawer skim.

Today's Server Payments

This report is used to view an individual employee's payment information for the current day; it generates the type of payments they received during their shifts. The report automatically prints on the receipt printer attached to the terminal running the report. This report is a shortcut version of the "Payment Report".

Payment Report

The Payment Report generates information on the current day or closed days. The payment report lists all payments made (cash and non-cash) tenders. Depending on the option chosen, the report itemizes all payments (and non-cash tips collected) within a date range.



Lists employees who had audits open during the selected date range.

Select an employee to review their individual payment report.

Server Payments generates a list of all payments used, separated by employee.

Consolidate Payments generates all payments used in a consolidated list (without employee information)

Page 1

Micro\$ale
1221 W. Brandon Blvd.
Payment Report 1/21/2012 to 1/22/2012

Report Date 01/26/2012 02:37 PM Printed By Nancy Supervisor

Heather Heim	Payment Type	Amount	Tips	Tip %
	Cash	19.58	0.00	
	Gift Card	40.27	7.00	17.38
	Cash	19.46	0.00	
	Cash	59.26	0.00	
	Cash	26.37	0.00	
	Cash	23.94	0.00	
	Cash	11.97	0.00	
	Credit Card	58.75	10.42	17.74
	Cash	77.94	0.00	
	Cash	37.53	0.00	
	Cash	29.36	0.00	
	Cash	53.35	0.00	
	Credit Card	64.70	13.00	20.09
	Total	522.48	30.42	

The report sorts the payments by tender, lists the total amount of the payment, as well as the tip amount applied to the tender. The ending is a grand total of all non-cash and cash tenders.

Reprint Server Audit

This function allows you to reprint a closed server audit (from the current day or previous days). After you select your day or date range, "Print to Screen?" prompts. If you select **yes**, the audit shows onscreen in the form of a text document. If you select **No**, the audit prints on the attached receipt printer.

Voids Today By Detail

Select Voids Today By Detail and then an employee's name. If you have an integrated camera system, you can input the time shown on the right of the report to view the employee entering the void.

Void Report			
Report Date 01/30/2012 02:37 PM Printed By Megan Manager			
Report For Wingstop Cashier_2			
Void Date : 01/30/2012	Voided By	Void Reason	Time
Brisket Dinner	Megan Manager	Customer No Show	02:37:08 PM
Chicken Platter	Megan Manager	Customer No Show	02:37:08 PM
1/2 Onion Straws	Megan Manager	Customer No Show	02:37:08 PM
** Void Total 14.97			

Server Sales Mix

This report is a date range report of the Daily Sales Mix per individual server. It shows all sold items, quantity sold, the dollar amount per item sold, and the percentage.

Report Date 01/26/2012 03:10 PM Printed By New Employee				
Server	Item Name	Quantity	Amount	Percentage
Heather Heim	Angus Burger	2	13.98	.00
	As Appetizer	1	0.00	.00
	As Meal	2	0.00	.00
	baked potato	3	1.99	.00
	Sides	1	0.00	.00
	Sweet Tea	2	0.00	.00
	Unsweet Tea	1	0.00	.00
	Well	1	0.00	.00
	Xangos Cheesecake	1	8.99	.00
	Total	44	100.32	

Department Sales and Category Sales by Individual

These reports generate the number of menu items sold within each department or category by employee. This report may be accessed for a single day or date range. The sales are organized by employee.

Page 1				
Micro\$ale 1221 W. Brandon Blvd. Department Report 1/19/2012 to 1/19/2012				
Report Date 01/26/2012 03:24 PM Printed By New Employee				
Server	Item Name	Quantity	Amount	Percentage
Billie Harris	Alcohol	4	10.75	.00
	Food	130	242.18	.00
	Total	134	252.93	

Tip Pooling

Tip pooling is used when all employees divide collected (non-cash) tips and split the tips evenly. The Noncash tip pool feature simply provides a consolidated calculation of the noncash tips collected for the day within a timeframe. It is the responsibility of the manager/shift leader to split up the tips.

The report prints on an attached receipt printer. If you have a report printer attached, the report is viewable as an onscreen PDF.

Non Cash Tip Pool

Starting Time

Ending Time

Day of Week

Total Tips Collected

Print Report
Exit

Tip Sharing (Tip Outs)

Tip Sharing is used when an employee tips out other employees with their own earned tips based on a percentage of their sales. For example, a bartender may be tipped out 1% of a server's sales.

! You must use the integrated time clock when using the tip sharing feature.

Part 1

Enable both of the following register options.

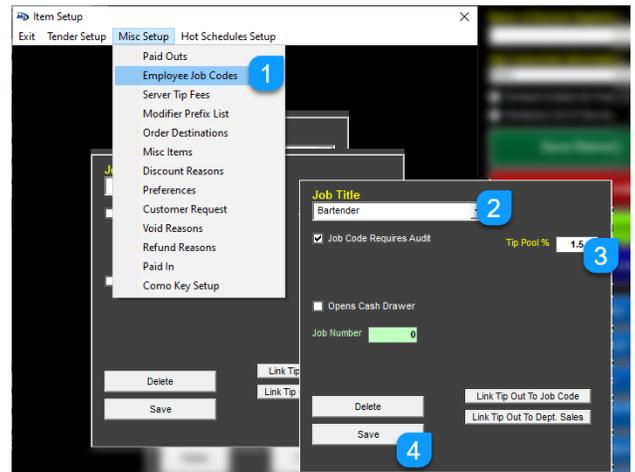
- Managers Menu > Register Setup > Terminal Configuration > Register Options > Full Service > Additional Options > **Turn on tip out deduction for tipped employees and enable Charge Tips are Paid on Payroll.**

A bracket is created on the daily balance sheet called "tip share collected" that inflates the "account for" total and matches the "accounted for" total (keeping the day in balance). If the *Charge Tips are Paid on Payroll* option is not ticked, the system considers the tip amounts an exempt sale and creates an imbalance in the day.

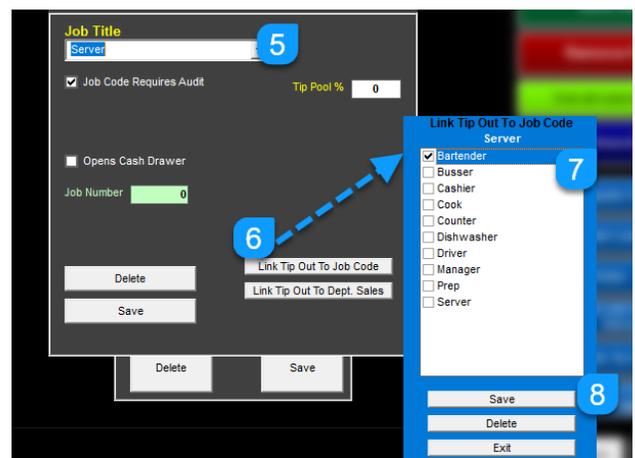
Part 2

After Part 1 is complete, go to Managers Menu > Register Setup > Terminal Configuration > Register Options > **Tenders-Job Codes-Paid Out-etc**

- 1 Click on Misc Setup > **Employee Job Codes**
- 2 Click on a job title that will **receive** a tip out
- 3 Enter the Tip % (without the %). For example, a bartender may receive 1.5% of Servers' sales.
If the % is only based on specific departments (such as Liquor, Beer, Wine), select Link Tip Out to Dept. Sales and save after selections are made
- 4 **Save**



- 5 Select a job title that will provide the tip out (such as a Server)
- 6 Select **Link Tip Out To Job Code**
- 7 Select all job codes that will be tipped out from Servers.
- 8 **Save** (blue submenu)
- 9 Select **Save** again on main screen



Additional Information

- If an employee leaves before the end of the day, the server's report will show "Bartender not tipped out". If no one is working that should be tipped out, the server keeps the tip out.
- Tip sharing is calculated on total sales for the day. The tip amount prints on the server audits, balance sheet, daily close and payroll reports.

Tips Withheld

Enabling this option changes the handling of charged tips within the audit as it will not deduct that amount from Net Cash Due on the audit. Instead, this amount will now display on the Time Clock reports and Daily Sales Summary screen.

Setup

- 1 For each employee, you must have “Hourly” and “Tipped” enabled on each job title (in Employee Maintenance)
- 2 Enable the register setting, **Charge Tips are Paid on Payroll**
Managers Menu > Register Setup > Terminal Configuration > Register Options > Full Service > Additional Options > Charge Tips are Paid on Payroll

! **Important:** If you withhold charged tips for payroll, you **MUST** enter the charge tip totals each day on the Daily Close Out screen within one of the “Deposit” fields. This allows the day to balance correctly.

Variations in Reports

- In the “Daily Sales Summary” area of the Reports Menu you will find an additional field in the last row called “Tips Withheld”, showing the withheld tips total.
- In the “Time Records Preview” report within the Time Clock Reports area you will see that the “T-Tips” and “Tip Sales” for each employee’s charged tips from their shift.
- In the “Daily Labor Report” report within the Time Clock Reports area you will see that the “Total Tips” and “Tip Sales” for each employee’s charged tips from their shift.

Example Reports

Preview Time Records displays the charge tips in the column “T-Tips” per employee, per shift worked:

Name	Gary Allen		SSN							
Work Date	10/09	5:00	Break Out	11:52	Reg	6.87	OT	0.00	Total Hours	6.87
			Break In						Tip Sales	0.00
			Out						T-Tips	10.00
									Job	Server
Department Name	Server		Regular Hours	6.87		Over Time	0.00			
Total Hours	6.87			0.00						
Sign: _____ I here by acknowledge that this is a true and complete record of my time.										
Summary	Gross Pay 22.33		Tip Sales 0.00		% Sales 0.00					
Summary Tips	Declared 10.00		Gratuity Charged 0.00		cc Tips 0.00		Tips Paid 0.00		Net Total Tips 10.00	
Totals	Regular Hours		Over Time		Dollars		Percentage			
Server	6.87		0.00		22.33					

Daily Labor Report displays an employee’s charge tips in the column labeled “Total Tips”:

Daily Labor Report 10/9/2014 To 10/9/2014							
Report Date 10/10/2014 04:15 PM Printed By New Employee							
NAME	Department	In Time	Out Time	HOURS	DOLLARS	Total Tips	Tip Sales
Gary Allen	Server	05:00	11:52	6.87	22.33	10.00	0.00
Total				6.87	22.33	10.00	0.00
Department Labor		Dollars		Percentage		Hour Used	
Cashier		\$0.00		%0.00		0.00	
Server		\$22.33		%0.00		6.87	
TOTAL LABOR		\$22.33		%0.00		6.87	
TOTAL NET SALES		\$0.00					

Employee Payroll Summary / Labor Report displays an employee’s charge tips in the column labeled “Tips”. The column for claimed cash tips are in the “Declared” column:

Employee Payroll Summary												
Period 10/9/2014 To 10/10/2014												
Report Date 10/10/2014 04:13 PM Printed By New Employee												
Emp Name	Emp Id	Job Code	Rate	Reg Hrs	OT Hrs	Total Hrs	Wages	Declared	Tips	Gratuity	Total	Tip Sales
Gary Allen		Server	3.25	6.87	0.00	6.87	22.33	10.00	20.00	0.00	30.00	100.00
Total				6.87	0.00	6.87	22.33	10.00	20.00	0.00	30.00	100.00
Reg Hrs	OT Hrs	Total Hrs	Reg Wages	OT Wages	Total Wages	Net Sales	Labor %	Declared	cc Tips	Grat		
6.87	0.00	6.87	22.33	0.00	22.33	0.00		10.00	20.00	0.00		

Driver Sales Report

A Driver Report tracks the total sales, tips, and fees a driver has accumulated during his or her shift. In Quick Service, a driver needs to be clocked-in and have the job code of Driver or Manager to be assigned to a delivery. In full service anyone with an audit can be assigned to a delivery. This report allows the driver to know how much they have made in tips for the day and what is owed at the end of their shift. This report is viewable and printable at any time during the day.

Steps to generate the Driver Report:

- 1 Select Phone Order > Close or Edit Phone Order > **Driver Sales Report**
- 2 Select a Driver. *This window will display a list of everyone who is clocked in that either has the job title of Driver or Manager*

Term	Description
Net Open Sales	Orders that have not been closed and are still waiting to be delivered
Open Discounts	Total discounts applied to undelivered orders
Open Sales Tax	Total tax of undelivered orders
Total Open Sales	Total sales of undelivered orders
Total Delivery Sales	Total sales of delivered orders (not including tips) "Total Delivery Sales" will only be visible on the Driver Report when the Total Open Sales is \$0.00. If it is not at \$0.00, Total Delivery Sales is replaced with "Net Open Sales" and "Total Sales Open & Closed"
Cash Drop	Any cash drop (skim/deposit) that was performed during the day for the driver
Credit Card Charges	Total check amount charged to credit cards (excludes charged tips)
Credit Cards Tips	Total tips that have been charged to credit card transactions
Total Charges	Credit Card Tips + Credit Card Charges
Total Delivery Charges	Total delivery fee charges
Net Del. Chg Due Driver	Total delivery charges the store owes to the driver (this amount is either a flat dollar amount or percentage of the delivery fee collected). <i>If this is not setup, please refer to Setting Up Delivery Fees, Driver Payment Amount</i>
Net Cash Due (Restaurant)	Total cash amount that the driver owes to the restaurant

Audit History or Assigned Drawer Report

The report is useful when you need to go back and view individual audit summaries. The Audit History Report (or Assigned Drawer depending on configuration) is a date range report generating data from closed days (historical sales). The Audit History gives concentrated information on individual employees' audits. The audit information is also available by solitary day in the Daily Sales Audit.

📍 Managers Menu > Reports Menu > **Audit History**

Register Name	Manager	Date	Start	End	Name	Sales	Discounts	Voids	Cash In Drw	Cash Dep.	+/-	Tips
PCS3	Kim Johnson	08/13/12	10:09 AM	11:21 PM	Rai Pots	0.00	0.00	0.00	0.00	0.00	0.00	0.00
PCS1	Jessica Jones	08/13/12	10:09 AM	05:59 PM	Jessica Jones	516.77	0.00	11.48	397.53	398.58	1.05	0.00
PCS2	Jessica Jones	08/13/12	10:09 AM	04:56 PM	Jasmine Perry	1078.18	0.00	1.99	591.66	592.20	0.54	0.00
PCS2	Kim Johnson	08/13/12	04:57 PM	11:00 PM	Nathan Corey	1487.46	0.00	0.00	930.16	930.60	0.44	0.00
PCS1	Kim Johnson	08/13/12	05:59 PM	12:01 AM	Kim Johnson	1527.32	24.36	0.00	947.35	947.14	-0.21	0.00
Total						4609.73	24.36	13.47	2868.52	1.82	1.82	0.00

A breakdown description of the audit summary is available on the Daily Sales Audit Report document. The notable area above is the **Cash In Drw** and **Cash Dep.** The 'Cash In Drawer' number is the cash amount that MicroSale knows *should* be in the drawer. The 'Cash Deposit' is the *actual* cash in the drawer, the number recorded after the cash countdown has been completed.

Start	Ending	Cashier	Register	Acct For	Disc	Void	Refund	Paid Out	Non Cash	Cash Collect	Skim	Expected	Total CID	+/-
10:09 AM	11:21 PM	Rai Pots	PCS3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
10:09 AM	05:59 PM	Jessica Jones	PCS1	516.77	0.00	11.48	0.00	0.00	119.24	397.53	0.00	397.53	398.58	1.05
10:09 AM	04:56 PM	Jasmine Perry	PCS2	1078.18	0.00	1.99	0.00	0.00	486.52	591.66	0.00	591.66	592.20	0.54
04:57 PM	11:00 PM	Nathan Corey	PCS2	1487.46	0.00	0.00	0.00	0.00	557.30	930.16	0.00	930.16	930.60	0.44
05:59 PM	12:01 AM	Kim Johnson	PCS1	1527.32	24.36	0.00	1.99	0.00	579.97	947.35	0.00	947.35	947.14	-0.21
				4609.73	24.36	13.47	1.99	0.00	1743.03	2868.70	0.00	2868.52	2868.52	1.82

Tracking Detailed Activity (Transaction Review)

Transaction Review provides detailed financial information for an individual employee, voids, tenders, and provides a copy of the full, itemized guest check. This information can be used to track an employee's sales performance, find user errors, and pinpoint check details. The transaction review can be used on live data (the current day) or previously closed days.

Managers Menu > **Transaction Review**

Main Screen

This area lists previously closed days within the current week. To go back farther, select View Backups. By default, you can go back up to two years. *Without a date selected, the filters search through the current day.*

Information used for the Search Criteria. By default, the current day and all times are used.

Select Terminal sorts transactions by a specific terminal.

Select View Backups to view more dates. You can go back up to two years.

Use the Search Criteria to search specific transactions. **Search All** lists all transactions for the selected day.

**To quickly find a customer's phone order for the current day, you can search through the regular POS phone order management screen.*

Generates an 'at a glance' report of all transactions within a selected date range

Transaction Review Main Screen Details:

- SELECT A DATE:** 08/03/2020
- Search Date:** 08/03/2020
- File Name:** Chk-Stat.mdb
- Register Name:** Msale
- Start Time:** 14:19
- End Time:** 14:19
- Employee Name:** None
- Transaction Count:** 2
- Search Criteria:**
 - Cashier / Server
 - Time
 - Voided Sales
 - Menu Item
 - Phone Customer
 - Check No
 - Address
 - Keyboard
 - Table/Tab Name
 - Search All
- Buttons:** Sales By Individual Report, Serving Time Summary, Exit

Search Results

Search results. Select a row to pullup the check details.

Show Items By Time is used in full service only. Option shows when each item was entered on the check (in minutes, starting at the time the check was opened).

Chk No	Order	Name	Time	Amount
1001	Dine In	John Smith	01:33 PM	0.00
1002	Dine In	John Smith	01:38 PM	0.00

Show Items By Time

Exit

Check Detail

The screenshot shows a POS interface for a check. The top section contains a metadata table. Below it is a list of items, followed by a 'Check Payments' section with a 'Cash' entry. The bottom of the screen shows a 'Check Total' of 12.84 and a 'Next Check' button. A vertical toolbar on the right contains buttons for 'Print Copy', 'Reprint Original Check', 'Attach Coupon', 'Get Video Clip', 'Exit', 'Move Up', 'Move Down', and 'Next Check'.

Server Name	New Employee
Check Number	1002
Table Number	1002
Number In Party	1
Time Check Open	04:48 PM
Check Date	01/20/2020
Close By	New Employee

1	BBQ Sliders	12.00
	Jaip Sausage	
Check Payments		
	Cash	12.84
	(Mins Open 0)	

Sales Tax	0.84
Check Total	12.84

Callout Boxes:

- Details of check; In bar environments, tabs can be opened and closed by different employees.** (Points to the metadata table)
- Menu items and modifiers on check** (Points to the item list)
- Payment media used; Cash, credit card type, gift card, etc.** (Points to the 'Cash' payment entry)
- Prints a copy of what is on the screen here.** (Points to the 'Print Copy' button)
- Prints an identical receipt that was originally handed to the customer; may include additional information such as 'change due' amount, phone number, etc** (Points to the 'Reprint Original Check' button)
- Allow you to attach a "Have one on me" coupon to the specified phone number.** (Points to the 'Attach Coupon' button)
- If using an integrated camera system, click Get Video Clip to watch the transaction on the surveillance system. *with DVR systems supporting text overlay** (Points to the 'Get Video Clip' button)

Voids and Discounts

A void is typically used to delete an item or check that assumingly has not been made. A discount is used on items that have been made or delivered. A void reenters an item back into inventory where a discount removes it from inventory.

It is important to properly mark voids and discounts, as it affects your gross sales. Discounts are tracked as deliverable sales while a void marks the sale as never happening. You can track each void and discount to ensure your staff and management are properly accounting for the transactions.

Most of your reports in MicroSale summarize a list of all discounts and voids used. This section provides additional details to further track the activity. For additional investigation, use the Transaction Review to view check details in entirety.

Voids and discount reports at a glance

Void Reports	
Current Week Voids	Provides information and detail pertaining to the current week voids
Void History	Provides information and detail pertaining to closed sales void history
Discount Reports	
Current Week Discounts	Provides information and detail pertaining to the current week discounts
Discount History	Provides information and detail pertaining to closed sales discount history

Voids

Current Week Voids Report

📍 Managers Menu > Reports Menu > **Current Week Voids**

The Current week void report is a date range report that generates a log of voids used within the current week (since the last weekly closeout). It lists pertinent check details such as the employee name, manager approval, date, check number, menu items voids, reason, amount and void time. If you need to further research this transaction, you can use Transaction Review to view all details of each check.

Note: To view voids for previously closed days, use the Void Report below.

Void Report

📍 Managers Menu > Reports Menu > **Voided Sales**

The Void Report is generated from closes sales (historical reports). This report is also accessible from the Daily Sales Summary screen under Misc History.

The Void History Report is generated from closed sales (historical data). The Voids Report provides information and detail pertaining to the selected date range. It lists pertinent check details such as the employee name, manager approval, date, check number, menu items voids, reason, and amount. To investigate further, search Voids in Transaction Review.

Page 1						
MicroSale 1221 W. Brandon Blvd. Void Report From 3/16/2020 to 3/16/2020						
Report Date 04/27/2020 11:22 AM Printed By NewEmployee						
Date	Check Number	Item Name	Reason	Amount	Void By	Void Time
Server Name BAR 3 BAR 3 03/16/2020	3011	Revolver DFT	Rang in Wrong	\$6.00	DARYL SWANSON	08:15 PM
Total			Quantity 1	\$6.00		

In full service environments, two additional void reports are available; Voids Today by Department and Voids Today by Detail. Please refer to the chapter on Server Reports for more information.

Discounts

Current Week Discounts

📍 Managers Menu > Reports Menu > **Current Week Discounts**

The Current week discount report is a date range report that generates a log of discounts used within the current week (since the last weekly closeout).

The report itemized a list of discounts used, the employee who was assigned to the transaction, the manager who approved the discounts, the amount and check number. If you need to further research this transaction, you can use Transaction Review to view all details of each check.

Note: To view discounts for previously closed days, use the Discounts Report below.

Discounts History

📍 Managers Menu > Reports Menu > **Discounts**

This report is generated from closed sales data (historical sales). The report is useful when you are interested in seeing where discounts are being applied. It displays the date, time the discount was taken, the employee's audit, discount name or typed reason, and the amount.

Discount History

Page 1			
Coupon History Report From 8/1/2012 to 8/8/2012			
Date	Time	Discount Name	Amount
Server Name -> Aide Coronado			
08/03/2012	9:32 PM	Made Not Sold	\$19.99
08/03/2012	9:33 PM	Made Not Sold	\$7.48
08/03/2012	11:57 PM	Made Not Sold	\$9.49
08/03/2012	11:57 PM	Made Not Sold	\$42.78
			Discount Total -> 79.74
Server Name -> Jasmine Perez			
08/07/2012	7:56 PM	10 % Discount	\$2.00
08/01/2012	4:08 PM	Employee Discount	\$5.42
08/02/2012	9:59 PM	Employee Discount	\$13.65
08/05/2012	5:48 PM	Employee Discount	\$2.49
08/02/2012	11:30 PM	Made Not Sold	\$18.28
08/02/2012	11:30 PM	Made Not Sold	\$18.98
			Discount Total -> 60.82
Server Name -> Jessica Jimenez			
08/02/2012	5:59 PM	Employee Discount	\$5.49
08/06/2012	4:43 PM	Made Not Sold	\$7.88
			Discount Total -> 13.37
Server Name -> Nadia Corral			
08/01/2012	11:37 PM	10 % Discount	\$1.32
			Discount Total -> 1.32
Server Name -> Vanessa Pacheco			
08/08/2012	11:42 PM	10 % Discount	\$1.32
08/03/2012	7:29 PM	Employee Discount	\$17.57
08/01/2012	11:53 PM	Made Not Sold	\$9.49
08/01/2012	11:53 PM	Made Not Sold	\$30.35
08/01/2012	11:54 PM	Made Not Sold	\$12.48
08/01/2012	11:55 PM	Made Not Sold	\$15.29
08/03/2012	8:04 PM	Made Not Sold	\$16.98
08/03/2012	8:05 PM	Made Not Sold	\$9.49
08/03/2012	8:06 PM	Made Not Sold	\$13.15
08/03/2012	8:06 PM	Made Not Sold	\$15.03
08/03/2012	8:06 PM	Made Not Sold	\$6.59
08/05/2012	10:16 PM	Made Not Sold	\$9.78
08/08/2012	9:19 PM	Made Not Sold	\$10.87
Total		Quantity 26	\$324.64

Discount Summary

A summarized variation of the Discounts Report is available in the Daily Sales Summary > Misc History > **Discounts**

Page 1			
Discount History From 3/6/2020 To 3/6/2020			
Discount Name	Type	Discount Amt	Quantity
Military Discount	Discount	\$10.20	2
20% Lunch Spec	FOOD	\$18.78	8
Comp Food	FOOD	\$14.48	2
Employee Discount	FOOD	\$33.38	8
Discount		\$10.20	2
FOOD		\$64.62	18
Total		\$74.82	20

Time Keeping & Labor

Time Clock Reports provide information about labor use, wages, and an analysis of labor costs and net sales percentages for a particular job title or department. The following reports pertain to employees (in alphabetical order with a short description of use)

Labor reports at a glance

Term	Description
Average Hourly Rate Exemption Report for Tipped Employees	Useful to quickly verify that employees are claiming enough tips to meet minimum wage requirements
Break Report	Allows you view your employees' breaks at a glance
Current Period Punch Report	Useful to see labor hours by department (or job code) and a full list of employee names. <i>Unlike the following report, Daily Labor Report, this shows the hours for the current pay period; The current pay period could be for one week, two weeks, or whenever the last Close Time Records was performed</i>
Daily Labor Report (Summary Only)	Useful to quickly see labor hours for the day; this will only show the labor by department (or job code) such as Manager, Cook, Cashier, Server
Daily Labor Report (Detailed)	Useful when you need to see the employees on the clock for a day, sales totals and labor percentages in previously closed days
History Punch Report	This report will show you a history of each time an employee has used the time clock feature
Hourly Labor Report	The Hourly Time report shows how much labor dollars and sales occurred per hour since the first order was taken. This is useful to control labor costs for the business
Hours by Department	Useful for quickly seeing which departments currently have the most hours worked. You can view this report for both closed and currently open time records
Individual Daily Time and Sales Report	Displays employee sales and time record information for a specific date or date range. It is useful for seeing total sales and labor dollars quickly. The data is updated as the employee clocks in/out, so it is available to be viewed before a close out is ran
Individual Time Card Review Report	Allows you to review and print a specific employee's time history for a specific date or date range. You can also select more than one employee at a time which gives you the ability to customize how your report will look. It includes a sign line for employees
Labor Cost from History	Useful when you want to know if your sales are outweighing your labor costs. This report is viewable after a Daily Closeout is performed.
Overtime Watch	Shows employees that are near or at overtime for the open time period. The report can flag employees' times for any number of hours. By default, the watch starts at 30 hours
Preview Current Time Records Report	Useful for viewing current payroll information as well as viewing when the last payroll close out occurred. This report is populated with data as soon as someone clocks in for the day
Print Access Codes	This report is useful when you need to quickly find employees' access numbers
Print Phone List	Used to print employees' phone numbers
Print Time Records Report	It is useful for viewing past payroll information. This report is populated with data as soon as a date or date ranges for time records are closed.
Who's Clocked In?	Used to view employees who are on the clock (includes clock in time). This report is also helpful for seeing if employees did not clock out.

Editing Employee's Time

Managers Menu > Time Clock Functions > **Edit Employee Time**

To edit an employee's clock in or clock out time, you must make the corrections before the end of the payroll period (before the records are sent to the payroll provider).

Note: Manual alterations show in red. This represents that alterations have been made to the employee's time

Running the report:

- 1 Select an employee from the dropdown list
 - 2 Touch any of the fields to change
 - 3 Select **Save Changes**
- If a record needs to be erased, press the **Erase** button and then select the record.
 - If you press **Delete Time**, and then the box under Job Name, the whole record for that day is deleted.
 - If an employee has more than one job title, and he/she accidentally clocked in under the wrong job name, it can be easily changed by touching the appropriate box under the Job Name and select the proper title. This can only be changed to a different job name if that employee has more than one job title. *Important: Save Changes before exiting*

Average Hourly Rate Exception Report for Tipped Employees

Managers Menu > Reports Menu > **Time Keeping Reports**

This report is useful to ensure your employees are claiming enough tips for minimum wage.

Running the report:

- 1 Select **Average Hourly Rate Exception**
- 2 Select the desired dates

If any employees fall below minimum wage, the exceptions report lists the employees' names. This report can be affected by employees either not reporting enough tips or due to underperforming.

Note: The minimum wage is set in Managers Menu > Register Setup > Terminal Configuration > Register Options > **Time Keeping**

Break Report

Managers Menu > Reports Menu > **Time Keeping Reports**

The Break Report allows you to preview breaks for the current pay period. You can also view breaks on the “Preview Time Records” Report. Some states enforce breaks every 4 hours. This report will help you view your employees’ breaks at a glance.

The report is available in PDF view on a back office computer or any terminal that is connected to a reports printer. The report can also be printed on any terminal with a receipt printer attached.

Page 1		Micro\$ale 1221 W. Brandon Blvd. Break Report		
Report Date 09/26/2012 01:21 PM Printed By Janet Marcello				
Name	Work Date	Break Out	Break In	Total Mins
Aiden Colorado	08/22	12:00 PM	12:35 PM	35
Total Break Mins				35

Show the date that the report was ran (the current day), time, and the employee who accessed the report. The report lists the employees that have taken breaks during the current pay period. It lists the work date, break times and the total minutes for the break. The “Break Out” is listed first, since the employee essentially “clocks out” before clocking back in.

It is helpful to use breaks instead of clocking in/out during break times. The break feature allows the option of paid or unpaid breaks and keeps the employees’ shifts consolidated.

Current Pay Period Punch Report

Managers Menu > Reports Menu > Time Keeping Reports

This report is useful for showing employee hours per department. It includes overtime, dollars spent, labor percentage, and regular hours. You can view this report in two different formats. When select date it will prompt you "Show Summary Only?" and you must choose Yes or No.

- Choosing **Yes**, generates a summarized labor report (by job title only):

Page 1

MicroSale
Labor Information
Period 12/24/2012 To 12/26/2012

Report Printed 12/26/2012 Printed By Wingstop Trainer

Summary Totals	Regular Hours	Over Time	Dollars	Percentage
Manager	14.28	0.00	120.01	5.61
Cashier	7.00	0.00	57.75	2.70
Cook	10.50	0.00	84.00	3.93
Total Hours Used	31.78			
Total OT-Hours Used	0.00			
Total Dollars Spent	261.76			
Labor Percentage	12.24			
Net Sales	2139.30			

- Choosing **No**, generates labor details for each employee and their assigned job title:

MicroSale
Labor Information
Period 12/24/2012 To 12/26/2012

Report Printed 12/26/2012 Printed By Wingstop Trainer

Anna Smith				
Department	Regular Hours	Over Time	Sales	
Cook	4.25	0.00	0	
Totals	4.25	0.00	0.00	
George Gee				
Department	Regular Hours	Over Time	Sales	
Cook	6.25	0.00	0	
Totals	6.25	0.00	0.00	
Manny Cashier				
Department	Regular Hours	Over Time	Sales	
Cashier	7.00	0.00	0	
Totals	7.00	0.00	0.00	
Robert Doe				
Department	Regular Hours	Over Time	Sales	
Manager	5.50	0.00	0	
Totals	5.50	0.00	0.00	
Amanda Smith				
Department	Regular Hours	Over Time	Sales	
Manager	8.78	0.00	0	
Totals	8.78	0.00	0.00	
Summary Totals	Regular Hours	Over Time	Dollars	Percentage
Manager	14.28	0.00	120.01	5.61
Cashier	7.00	0.00	57.75	2.70
Cook	10.50	0.00	84.00	3.93
Total Hours Used	31.78			
Total OT-Hours Used	0.00			
Total Dollars Spent	261.76			
Labor Percentage	12.24			
Net Sales	2139.30			

Daily Labor Report (Summary Only)

Managers Menu > Reports Menu > Time Keeping Reports > **Daily Labor Report**

Common Question: “The Daily Labor and Daily Audit Report Labor do not match.”

Reason: The Daily Audit Report is captured when the daily close out is performed. The Daily Labor Report is closing at the default time of 4:00 am.

Example: Your restaurant closes at 11:00 pm, and you go ahead and run the daily close to start doing your other end of day processes. Your end of day is closed, however you still have employees cleaning and finishing their shift. The employees could clock out at 1:00 AM when their tasks are completed.

Solution: To make the totals always match, set the Daily Close to auto close at 4:00 am. This will ensure that the numbers always match, as all employees will be clocked out.

The report pulls information from the Time Records Database (time records.mdb). The report offers information for single days in the current (open) payroll period. The report is useful when you would like to see your labor dollars and percentages for a single day in your current pay period.

The report is available for print as a PDF (when connected to a Reports Printer) or will print on a 40 column receipt printer.

It will provide information for the labor departments (or Job Codes) such as Manager, Cook, Cashier, Server, etc. To populate the Dollars and Percentage fields, you must have the employees' wages inputted in the Employee Maintenance area.

Page 1				
Labor Information				
Period 08/23/2012 To 08/23/2012				
Report Printed 08/24/2012 Printed by Adam Anderson				
Summary Totals	Regular Hours	Over Time	Dollars	Percentage
Manager	30.03	0.00	290.00	0.143
Cook	46.00	0.00	378.00	0.1875
Cashier	44.50	0.00	315.00	0.156
Total Hours Used		120.53		
Total OT-Hours Used		0.00		
Total Dollars Spent		983.00		
Net				
Sales		2016.78		

Daily Labor Report Full Report

Managers Menu > Reports Menu > Time Keeping Reports > **Daily Labor Report**

The Daily Labor Report shows previously closed days in the *current* payroll period.

The report shows employees on the clock for the day, the department name (job code) for all of the jobs he/she has worked for the day, the hours, over time (if applicable) and the sales rang in with his/her audit.

History Punch Report

Managers Menu > Reports Menu > Time Keeping > **History Punch**

This report shows a history of each time an employee has used the time clock; the date, time in, break out, break in, time out, total time, labor dollars, sales, tips, and how many breaks they have taken. This report is useful for viewing a historic total of how many breaks have been taken and time record information. It is only available after a daily close out is run and overtime is not shown on this report.

Hourly Labor Report

Managers Menu > Reports Menu > Time Keeping > **Hourly Labor Report** > *Select Date Range*

The Hourly Time report shows how much labor dollars and sales occurred per hour since the first order was taken. This is useful to control labor costs for the business. Labor Percentage is calculated by dividing Labor Dollars Spent by Sales Dollars.

Hours Used	Spent	Sales	Labor %	Production
12:00 PM Hours Used 0.25	2.06	0.00	0.00%	0.00
01:00 PM Hours Used 1.00	8.25	29.70	27.78%	29.70
02:00 PM Hours Used 1.00	8.25	0.00	0.00%	0.00
03:00 PM Hours Used 0.27	2.20	0.00	0.00%	0.00
Total Hours Used 2.52	20.76	29.70	69.91%	11.80

Hours by Department Report

Managers Menu > Reports Menu > Time Keeping > **Hours by Department**

The Hours by Department Report will display each Employee's time sorted by the department they are listed under. This is useful for quickly seeing which departments currently have the most hours worked. You can view this report for both closed and currently open time records.

Department	Employee	Date	In Time	Out Time	HOURS	Total Tips
Cashier	Kelly Cashier	11/24	17:00	22:30	5.50	0.00
Cashier	Kelly Cashier	11/26	00:15	00:15	0.00	0.00
Cashier	Kelly Cashier	11/27	18:00	22:00	4.00	0.00
Cashier	Kelly Cashier	11/28	10:00	17:15	7.25	0.00
Cashier					16.75	
Cook	Manny Juan	11/24	18:00	00:30	6.50	0.00
Cook	Manny Juan	11/25	10:00	17:30	7.50	0.00
Cook					14.00	
Supervisor	Sarah Supervisor	11/24	10:00	17:00	7.00	0.00
Supervisor	Sarah Supervisor	11/25	10:00	17:00	7.00	0.00
Supervisor	Sarah Supervisor	11/26	10:00	17:00	7.00	0.00
Supervisor	Sarah Supervisor	11/27	17:00	00:15	7.25	0.00
Supervisor	Sarah Supervisor	11/29	17:00	00:15	7.25	0.00
Supervisor	Sarah Supervisor	11/30	18:00	22:00	4.00	0.00
Supervisor					39.50	

Individual Daily Time and Sales Report

Managers Menu > Reports Menu > Time Keeping > **Individual Daily Time and Sales Report**

This report will display employee sales and time record information for a specific date or date range. It is useful for seeing total sales and labor dollars quickly. The data is updated as the employee clocks in/out and closes their audit so it is available to be viewed before a close out is ran.

Included data:

- ✓ Clock In/Out times
- ✓ Total Hours
- ✓ Total Labor Dollars
- ✓ Total Tips
- ✓ Total Sales

Page 1							
MicroSale 1221 W. Brandon Blvd. Daily Labor Report 1/9/2013 To 1/9/2013							
Report Date 01/09/2013 11:43 AM Printed By Wingstop Trainer							
NAME	Department	In Time	Out Time	HOURS	DOLLARS	Total Tips	Ind. Sales
Sandra Smith	Manager	09:00	13:00	4.00	33.00	0.00	0.00
Kelly Cashier	Cashier	10:33	11:25	0.87	6.96	0.00	250.25
Total				4.87	39.96	0.00	250.25

Individual Time Card Review Report

📍 Managers Menu > Reports Menu > Time Keeping > **Individual Daily Time and Sales Report**

This report will allow you to review and print a specific employee's time history for a specific date or date range. You can also select more than one employee at a time which gives you the ability to customize how your report will look. It includes a sign line for employees. This is printable on both a report printer and receipt printer.

Top of the report shows:

- ✓ Employee Name
- ✓ SNN
- ✓ Date
- ✓ Time In/Time Out
- ✓ Break Out/Break In
- ✓ Total Hours
- ✓ Department Name
- ✓ Regular Hours (per dept.)
- ✓ Over Time Hours (per dept.)
- ✓ Total Hours
- ✓ Sign line

Bottom of the report shows (Summary):

- ✓ Total Sales
- ✓ Total Tips
- ✓ Gross Pay
- ✓ Tip %
- ✓ Department Name
- ✓ Regular Hours (per dept.)
- ✓ Over Time Hours (per dept.)
- ✓ Dollars Spent
- ✓ Total Hours
- ✓ Total Dollars

Name Kelly Cook		SSN										
Work Date	Time	Break Out	Break In	Out	Reg	Day	OT	0	Total Hours	Tip Sales	T-Tips	Job
12/17	17:00			0:15	7.25	0.00			7.25	0.00	0.00	Cook
12/19	17:00			21:15	4.25	0.00			4.25	0.00	0.00	Cook
12/21	17:15	18:59	19:28	0:45	7.02	0.00			7.02	0.00	0.00	Cook
12/23	9:00	13:42	14:11	17:30	8.02	0.00			8.02	0.00	0.00	Cook
Department Name				Regular Hours				Over Time				
Cook				26.54				0.00				
Total Hours				26.54				0.00				
Sign : _____ I here by acknowledge that this is a true and complete record of my time.												
Summary		Gross Pay 218.95			Tip Sales 0.00			% Sales				
Totals		Regular Hours			Over Time			Dollars			Percentage	
Cook		26.54			0.00			218.95			1.34	
Total Hours Used				26.54								
Total Dollars Spent				218.95								
Labor Percentage				1.34								
Net Sales				16317.99								

Labor History

Managers Menu > Reports Menu > Daily Sales Summary > **Labor History**

This report shows labor dollars spent during a selected day or date range. This report is useful when you want to know if your sales are outweighing your labor costs. This report is viewable after a Daily Closeout is performed.

Page 1		
Labor History From 08/31/2012 To 08/31/2012		
Department	Amount	Percentage
Manager	\$35.76	35.1
Total	\$35.76	

Percentage = Total Department Labor Cost / Net Sales

Amount = Department Labor Pay Rate * Department Labor Hours

Overtime Watch

Managers Menu > Reports Menu > Time Keeping > **Overtime Watch**

The Overtime Watch report is available in PDF view on a back office computer or any terminal that is connected to a reports printer. The report can also be printed on any terminal with a receipt printer attached.

The Overtime Watch Report shows employees that are near or at overtime for the open time period. The report can flag employees' times for any number of hours. By default, the watch starts at 30 hours. This can be altered in Register Options.

Name	Hours Worked
Aiden Colorado	40.43
Kim Johnson	39.93
Jessica Jones	38.15
Nancy Mendez	40.27

To change alert numbers:

Managers Menu > Register Setup > Terminal Configuration > Register Options > **Terminal Setup**

Turn on alerts (only set on 1 register)
Alerts are emailed to email addresses set in Email Setup

Maximum void dollar amount

Maximum discount dollar amount

Maximum labor percentage

Serving time in minutes

Maximum hours for any employee per week

Note: Checking the option, Turn on Alerts, automatically emails all associated reports to management when the restaurant has met or gone above the set alert number.

Preview Current Time Records Report

Managers Menu > Reports Menu > Time Keeping > **Preview Current Time Records**

Running the report:

- 1 Select **Preview Current Time Records**
- 2 Select a date by using the Calendar or use the drop-down fields for the Start and End date. **The dropdown fields are the currently open records that have yet to be closed out. Using the dropdown dates instead of selecting dates on the calendar is a quick way to see when the site's last payroll closeout was performed.**

This report allows you to preview open time records. It will list the following information: Name, SSN, Work Date, Time In/Out, Break In/Out, Regular Hours, Over Time Hours, Total Hours, Tip Sales, Total Tips, Job Title, Department Name, Gross Pay, % Sales, and a Sign line. If an employee altered a time record, it will be shown in this report.

It is useful for viewing current payroll information as well as viewing when the last payroll close out occurred. This report is populated with data as soon as someone clocks in for the day.

An altered shift is represented by an asterisk (*). Below the time records, it will say "Shift Edit By Employee Name". The name is recorded when the employee logs into the Managers Menu. In the employee's shift for the week (where you clock in/out), altered shifts are shown in red.

Name	SSN	Work Date	Time	Break Out	Break In	Out	Reg	Day OT	Total Hours	Tip Sales	T-Tips	Job	
Kim Johnson	1003	08/19	17:00			23:15	6.25	0.00	6.25	0.00	0.00	Cashier	
		08/20	18:00			23:00	5.00	0.00	5.00	0.00	0.00	Cashier	
		08/21	17:00			23:00	6.00	0.00	6.00	0.00	0.00	Cashier	
		08/22	11:00			17:41*	6.68	0.00	6.68	0.00	0.00	Cashier	
Shift Edit By Janet Marcello													
Department Name		Regular Hours			Over Time								
Cashier		23.93			0.00								
Total Hours		23.93			0.00								
Sign : _____ I here by acknowledge that this is a true and complete record of my time.													

Print Access Codes Report

Managers Menu > Reports Menu > Time Keeping > **Print Access Codes**

This report is useful when you need to quickly find employees' access numbers.

The employees will be listed in alphabetic order by the last name (first name, last name)

Page 1	
MicroSale 1221 W. Brandon Blvd. Employee Access Level List	
Report Date 09/25/2012 03:42 PM Printed By Programmer	
Winston Cash	1
Nathan Corey	1002
Robert Gavin	1008
Sam Jara	4550
Kim Johnson	0315
Joe Levy	5508
Nancy Mendez	1009
Tracey Mode	1234
Kate Mooney	6917
Jasmine Perry	1010
Rei Pots	3
Shawn Reih	2
Thomas Samuel	1006
Bernie Santuin	1007

Print Time Records Report

Managers Menu > Reports Menu > Time Keeping > **Print Time Records**

Note: You may either select a date by using the Calendar or you can use the drop-down fields for the Start and End date. **The only dates available in the drop-down Start and End fields are the records that are closed out.**

The Print Time Records Report displays a historical record of time records that have been closed. It will list the following information: Name, SSN, Work Date, Time In/Out, Break In/Out, Regular Hours, Over Time Hours, Total Hours, Tip Sales, Total Tips, Job Title, Department Name, Gross Pay, % Sales, and a Sign line.

It is useful for viewing past payroll information. This report is populated with data after the time records are closed.

Name	Aiden Colorado	SSN	1001							
Work Date	08/19	Time	12:00	Break Out		Break In	18:00	Out	6.00	Reg
								Day OT	0.00	Total Hours
									6.00	Tip Sales
									0.00	T-Tips
									0.00	Job
Department Name	Regular Hours			Over Time						
Manager	6.00			0.00						
Total Hours	6.00			0.00						
Sign :	_____ I here by acknowledge that this is a true and complete record of my time.									
Summary	Gross Pay		0.00		Tip Sales		0.00		% Sales	

Print Phone List

Managers Menu > Reports Menu > Time Keeping > **Print Phone List**

This option will allow you to print out all of the employee's phone numbers that have been entered into the system in the *Employee Maintenance* portion of the program. A list will be automatically printed when the "Print phone list" button is selected. If the system is configured to print to an 80 column printer, the report is displayed on the screen for you to print and/or email.

Who's on the Clock?

Managers Menu > Reports Menu > Time Keeping > **Who's on the Clock?**

This report is available in PDF view on a back office computer or any terminal that is connected to a reports printer. The report can also be printed on any terminal with a receipt printer attached.

This report is designed to indicate which employees are clocked in at the time the report is generated. The report is useful to quickly determine if anyone is late, if there are too many people on the clock, and/or to verify that everyone is clocked out at the end of the day.

Closing Time Records

This function allows you to close open time records for a specific date or date range. Once the time records are closed, they will no longer be editable. This function is useful for finalizing employee time records. This function should be used weekly or bi-weekly depending on the setup of the restaurant. A report is viewable after closing the records that will show each employee's times for a specific date or date range.

The report lists the following information: Name, SSN, Work Date, Time In/Out, Break In/Out, Regular Hours, Over Time Hours, Total Hours, Tip Sales, Total Tips, Job Title, Department Name, Gross Pay, % Sales, and a Sign line.

To Close Time Records:

📍 Managers Menu > Reports Menu > Time Keeping Reports > **Close Current Time Records**

- 1 Select **Close Current Time Records**
- 2 Alternatively to selecting dates on the calendar, only dates available in the drop-down are records that are currently open.
- 3 The report prints to either a receipt printer or a report printer depending on your configuration of the system. You can see an example of both below:

MicroSale

Period 8/19/2012 To 8/19/2012

11:02:28 AM Date 8/28/2012

Name : Aiden Colorado
SSN : 1001

Work Date	Time In	Brk Out	Brk In	Time Out	Total Hours
08/19	12:00			18:00	6.00

Dept Name Reg Hr OT Hr

Manager 6.00 .00

Total Hours 6.00 .00

Sign : _____
I here by acknowledge that this is a true and complete record of my time.

Summary

Sales 0.00 Gross Pay 0.00
Total Tips 0.00 Tip %

MicroSale

Report Printed 08/27/2012 Printed By William Train

Name	SSN	Work Date	Time	Break Out	Break In	Out	Reg	Day OT	Total Hours	Tip Sales	T-Tips	Job
Aiden Colorado	1001	08/19	12:00			18:00	6.00	0.00	6.00	0.00	0.00	Manager
Department Name							Regular Hours	Over Time				
Manager							6.00	0.00				
Total Hours							6.00	0.00				
Sign : _____ I here by acknowledge that this is a true and complete record of my time.												
Summary			Gross Pay 0.00		Tip Sales 0.00		% Sales					

Formulas Used:

Gross Pay = Rate of Pay * Total Hours
 Total Tips = Cash Tips + Non Cash Tips
 Sales = Net Sales

The bottom of the report lists totals for Regular Hours and Over Time Hours per job title and a total for all job titles.

Summary

Sales 0.00 Gross Pay 0.00
Total Tips 0.00 Tip %

Totals	Reg Hr	OT Hr
Manager	12.75	.00
Cashier	18.25	.00
Cook	30.25	.00
Total Hours	61.25	.00

Daily Sales Summary (Historical Sales Reports)

The main screen of the Daily Sales Summary provides your week at a glance. This data is generated from closed sales; the current day's sales are compiled after the closeout. All reports offered in this section are generated from closed sales. *Many of the reports offered in this area are also available on the main Reports Menu in the gray, Sales History section.*

Daily Sales Summary

Managers Menu > Reports Menu > **Daily Sales Summary**

Common Uses for the Daily Sales Summary:

- Viewing sales data for the day/week quickly
- Accessing history reports on the tool bar
- Editing daily deposits
- Viewing the weather for the day or past days (including written memos)
- Accessing sales trends
- Reprinting the daily close out
- Reclosing the day
- Resending (reposting) sales to the cloud

Toolbar linking to various history reports (please refer to first page to see included reports)

To go back to certain weeks or days, click a date in the calendar. To populate the entire grid, pick the starting day of the week. By default in the system, the business week starts on Monday.

Bank deposits may be altered by right clicking on the number field in the Bank Deposits row.

Double click any 0.00 value field to view the daily weather and attached memos.

The left and right arrows will toggle through weeks. You may go back up to two years.

Click in the column for the desired day to reprint a close out. *Reprint Day* reprints necessary information for a day that has been closed. *Print* prints the current screen.

Summary	03/02/20	03/03/20	03/04/20	03/05/20	03/06/20	03/07/20	03/08/20	Total
Gross Sales	4569.53	16583.72	10878.84	10020.88	9010.85	13060.61	3890.62	68015.05
Net Sales	2307.45	9693.01	8652.76	6870.25	5995.43	12329.21	3857.09	49705.24
Sales Tax	139.24	615.79	631.32	389.62	420.64	629.10	220.74	3046.45
Special Tax	51.16	182.99	155.42	176.24	206.79	387.07	93.66	1253.33
Surcharge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Voids	0.00	317.00	56.00	27.45	58.00	0.00	0.00	458.49
Discounts	44.38	64.74	72.24	55.67	74.82	62.28	33.53	407.66
Charges	5027.30	17509.04	11190.16	10990.14	8777.22	13851.72	3794.37	71139.95
Paid Outs	0.00	0.00	0.00	0.00	100.00	0.00	0.00	100.00
Bank Deposits	0.00	0.00	0.00	0.00	0.00	712.30	767.83	1480.13
Non Taxed Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Til To Acct for	4533.87	15900.74	9621.85	9999.47	7279.96	13444.35	4171.49	64951.73
Over / Short	63.43	988.69	933.40	389.74	937.53	0.00	0.00	3312.79
Labor Dollars	685.93	1327.47	1751.30	1349.31	1630.12	1881.39	1227.43	9852.95
Labor Hours	63.61	111.83	143.10	130.58	154.60	191.92	128.53	924.17
Labor Percentage	29.73	13.70	20.24	19.64	27.19	15.26	31.82	19.82
Sales Percentage	4.64	19.50	17.41	13.82	12.06	24.80	7.76	99.99
Go Sales	2.99	10.19	65.02	7.98	0.00	10.28	41.58	138.04
Call In Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Drive Thru Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gift Cert/Paid In	2036.02	5408.95	182.35	2563.32	657.10	98.97	0.00	10946.71
Tip Fee Income	0.00	0.00	0.00	0.00	7.00	0.00	0.00	7.00
Refunds	0.00	0.00	882.16	0.00	1614.12	9.30	0.00	2505.58
Deposit Paid In	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tips Withheld	430.00	619.61	634.91	600.95	652.73	1119.67	390.71	4448.56

For a 0.00 column without a date, it means either the daily close has not yet ran, or that the restaurant was closed and a daily close out was not necessary.

Sales Summaries Reports at a glance

All reports in this section are generated from closed sales (historical data).

Term	Description
History Reports	Provides various reports such as sales summary, tender types used, sales by department or category, weekly sales, and sales by meal period.
Labor History	Useful to quickly see labor hours for the day; this will only show the labor by department (or job code) such as Manager, Cook, Cashier, Server (Please refer to Labor and Time Keeping section)
Daily Audit Report	The Daily Audit Report is the most commonly used report in MicroSale. It is a daily breakdown of a day's sales by various areas. The report allows management and operators to analyze a daily recap of sales with comparisons to last year, labor, and forms of payment in a quick snapshot view.
Misc History	Provides detailed information for sales accrued by Tender Type, when Discounts and Voids are being applied and when Paid Outs are used for supplies.
Product Mix	Duplicate report from Menu and Menu Sales (please refer to section on Menu Item and Sales)
Balance Sheet	Used to balance your products sold to payments collected. Used for a single day or date range
Sales Recap	This report is useful when you want to view sales by department for a closed day or range of days.
Find Top 10 Sales Far	The Top 10 Sales Report is a useful way to view your top or bottom grossing sales for the past two years (approximately 730 days by default)
Weekly Graphs	The reports are useful when you would like to see a visual breakdown of your sales numbers compared by day for the week.
Edit (Sales)	Allows you to reclose or edit closed day's sales information.
Period Reports	MicroSale automatically makes a 13-period calendar. Depending on when you start your week (for example many restaurants start on Monday rather than Sunday), that first day in January is the start of the 13-period cycle and increments exactly 4 weeks.

Sales Summary

This report is also located on the main reports menu. The report is useful to view a day's or range of days' information of generalized sales, payment types, discounts, and department sales.

The report is similar to the Sales Recap, except it offers Gross Receipt Sales. As you familiarize yourself with MicroSale reports, you will discover that there are many variations of the same data to achieve different objectives.

Page 1		MicroSale	
		1221 W. Brandon Blvd.	
		Sales Summary Report	
Report Date 01/16/2013 04:22 PM Printed By Meg D		Begin Period 8/1/2012	
		End Period 8/1/2012	
04:22 PM			
01/16/2013			
Dollars			
Gross Receipts	4522.80		
Gross Sales	4186.60		
Refunds	0.00		
Net Sales	4109.26		
Non Taxed Sales	32.50		
Non Sales Revenue	0.00		
Net Sales Tax	336.20		
Net Special Tax	0.00		
Net Surcharge	0.00		
Discounts	75.35		
Voided Sales	1.99		
Net Sales Including All Tax	4445.46		
Bank Deposits	2512.35		
Dollars			
Tenders			
Amex	38.16	3	
MasterCard	432.49	28	
Visa	1459.68	71	
Discounts		Quantity	
10 % Discount	1.32	1	
Employee Discount	5.42	1	
Made Not Sold	68.61	4	
Department Sales		Quantity	
Beer	32.50	10	0.79%
Bone-In	645.50	1031	15.71%
Boneless	92.98	81	2.26%
Combos	2953.59	3757	71.88%
Discount	-75.35	7	1.83%
Non-Alcoholic	103.73	62	2.52%
Sides	265.97	240	6.47%
Split	90.34	135	2.20%

Department Sales

The report is a date range report based on historical data (closed days).

The Department Report is useful to see closed day(s) or week's sales summarized by department only. The report is available for print on a 40-column printer or viewable as a PDF when attached to a Report Printer.

Department Sales by Individual

The Server Department Report generates the number of menu items sold within each department by employee. This report may be accessed for a single day or date range. It will display a single server's department sales.

Page 1				
Micro\$ale 1221 W. Brandon Blvd. Department Report 1/19/2012 to 1/19/2012				
Report Date	01/26/2012	03:24 PM	Printed By	New Employee
Server	Item Name	Quantity	Amount	Percentage
Billie Harris	Alcohol	4	10.75	.00
	Food	130	242.18	.00
	Total	134	252.93	

Note: To view this report with live data for the current day, use the Category/Department Report located on the main page of the Reports Menu.

Category Report

The report is a date range report based on historical data (closed days).

The Category Report is useful to see closed day(s) or week's sales summarized by category only. The report is available for print on a 40-column printer or viewable as a PDF when attached to a Report Printer.

The **Item Name** lists the names of categories (includes discounts, coupons, and gratuity if applicable). The **Quantity Sold** is the number of menu items sold within the category, dollars sold is dollars sold within the category, and the **Percentage Sold** generated by the category.

Note: To view this report with live data for the current day, use the Category/Department Report located on the main page of the Reports Menu.

Category Report by Individual

This report generates the number of menu items sold within a category sold by employee. Also shows the percentage sold per category. Like all date range reports, there must be a starting and ending date range entered. A server name must also be selected from the server list screen.

Page 1				
Micro\$ale 1221 W. Brandon Blvd. Category Report 1/19/2012 to 1/19/2012				
Report Date	01/26/2012	03:30 PM	Printed By	New Employee
Server	Item Name	Quantity	Amount	Percentage
Billie Harris	Appetizers	6	7.74	.00
	Bar	4	10.75	.00
	Chicken	6	18.98	.00
	Desserts	2	4.99	.00
	Drinks	44	35.79	.00
	Pastas	8	41.95	.00
	Salads	30	59.88	.00
	Sandwiches	10	40.93	.00
	Side Orders	15	8.95	.00
	Soup	5	9.98	.00
	Steaks and Seafood	4	12.99	.00
	Total	134	252.93	

Order Destination

The Order Destination Report is also located in the Managers Menu > Reports Menu

Order Destination is useful to see the ratio of Dine In versus To Go sales numbers. The Quantity is the number of menu items sold in each order destination, the Sales is the number of sales generated by the destination and then the percentage between the two types of destinations.

Page 1			
Period Begin 10/3/2012 Period Ending 10/10/2012			
11:13 AM 01:22:2013 Printed By Adam Gary			
Order Type	Quantity	Sales	Percent
Dine In	1450	11148.28	99.38
Go Order	11	69.22	0.62
Total Sales		11217.50	

Weekly Sales

The Weekly Sales Report is a History Report, which means that information populates after the Weekly Close Out has been completed. The report is useful when you want to see summarized sales numbers. You may see weeks in more detail by toggling through the spread sheet on the main page of the Daily Sales Summary screen.

The report is organized by Week Number, such as #1 is the first week in January, and so forth; based on 52 weeks in a year.

Week Number	Net Sales	Sales Tax	Discounts	Non Taxed
# 32	25070.37	2057.74	300.08	119.00
# 33	9434.61	773.02	24.56	63.00
Total	34504.98	2830.76	324.64	182.00

Meal Periods

This report is generated from closed sales data (historical sales).

The Meal Periods Report is also located in the Managers Menu > Reports Menu

Meal periods group sales into time periods such as 'breakfast', 'lunch', 'through time', 'dinner'. Comparing Meal Period Reports over a period of weeks or months can help you to analyze trends.

Page 1													
MicroSale 1221 W. Brandon Blvd. Meal Period Report													
Report Date 02/18/2013 03:15 PM Printed By Meg D													
Date Start : 10/7/2012													
Date End : 10/7/2012													
Period Name	Period Start	Period End	Department	Sales	Count								
Breakfast	6:00	10:00											
Lunch	11:00	14:00											
			Discount	-5.60	3.00								
			Food	0.50	1.00								
			Ice Cream	41.00	26.00								
Thru	15:00	17:00											
			Discount	-5.80	3.00								
			Ice Cream	28.00	15.00								
Dinner	18:00	21:00											
			Discount	-19.60	7.00								
			Food	4.50	6.00								
			Ice Cream	177.50	100.00								
Late Night	22:00	5:00											
Date	Day	Break fast	Count	Lunch	Count	Thru	Count	Dinner	Count	Late Night	Count	Total	Tax
10/07/12	Sunday	845.04		101		722.36		175.51		1742.91		1742.91	104.72
		0.00	00	845.04	101	722.36	91	175.51	22	0.00	00	1742.91	104.72
Averages													
Day	Break fast	C-Avg	Lunch	C-Avg	Thru	C-Avg	Dinner	C-Avg	Late Night	C-Avg	Total	C-Avg	
Sunday	0.00	0.00	845.04	8.37	722.36	7.94	175.51	7.98	0.00	0.00	1742.91	8.14	
Total											1742.91	8.14	

! The example are set times by default. You may change the *names* of the meal periods and change the *hours*. In order to NOT overlap sales in the meal periods, make sure the same hour is not listed twice. For example, Breakfast in the picture is set from 6:00-10:00 while Lunch starts at 11:00.

! **Important:** 10:01 am is the beginning of the hour for 11:00, 14:01 is the beginning of the hour 15:00, etc. The Breakfast Hours of 6:00-10:00 are strictly the sales between 6:00-10:00.

The Meal Period Report is broken into two sections; the top, consolidates all days' (or one day's) sales information into sales by the meal period names, start and end time, departments (of menu items sold), sales, and menu item count. The restaurant in the example is an ice cream shop with departments of Food, Ice Cream, and Discount.

The second section breaks down each day and provides a summary of each including menu item count per department, totals, customer average and tax.

Daily Audit Report

Managers Menu > Reports Menu > Daily Sales Summary > **Daily Audit Report**

The Daily Audit Report is the most commonly used report in MicroSale. It is a daily breakdown of a day's sales by various areas. The report allows management and operators to analyze a daily recap of sales with comparisons to last year, labor, and forms of payment in a quick snapshot view. The Daily Audit Report is captured when the daily close out is performed.

Start	Ending	Cashier	Register	Acct For	Disc	Void	Refund	Paid Out	Non Cash	Cash Collect	Skim	Expected	Total CID	+/-
12:00AM	08:18AM	Rios John	POS2	528.06	1.03	16.45	0.00	0.00	377.97	150.09	0.00	150.09	149.00	-1.09
12:03AM	08:20AM	Chase Rey	POS1	132.61	0.00	0.00	0.00	0.00	82.65	49.96	0.00	49.96	49.96	0.00
08:18AM	04:12PM	Florez Juan	POS2	1397.44	0.70	5.16	0.00	0.00	1167.01	230.43	0.00	230.43	230.00	-0.43
08:20AM	04:12PM	Lopez Lauren	POS1	262.39	0.00	0.00	0.00	0.00	152.30	110.09	0.00	110.09	110.09	0.00
04:12PM	11:58PM	Plato Patricia	POS2	1530.70	2.29	2.58	0.00	0.00	1254.32	276.38	0.00	276.38	276.38	0.00
04:13PM	11:57PM	Smith Hannah	POS1	640.86	0.00	0.00	0.00	0.00	435.60	205.26	0.00	205.26	205.26	0.00
				4492.06	4.02	24.19	0.00	0.00	3469.85	1022.21	0.00	1022.21	1020.69	-1.52
Hour	Dollars	Labor%	Tran	LY \$	LY Qty	+/-	Discount		Amount	Qty	Tender Name		Amount	
10:00AM	522.54	0	36				Military Discount		2.99	2	Amex		136.88	
11:00AM	410.44	0	28				Sr Citizen		1.03	1	Discover		25.41	
12:00PM	447.39	0	41				Total		4.02	3	Mastercard		579.79	
01:00PM	233.59	0	30								Uber Eats		419.40	
02:00PM	233.59	0	24								Visa		2308.37	
03:00PM	275.98	0	29								Total		3469.85	
04:00PM	275.40	0	20											
05:00PM	661.03	0	44											
06:00PM	241.69	0	20											
07:00PM	362.84	0	40											
08:00PM	257.87	0	16											
09:00PM	252.84	0	19											
Total	4175.20		347			4175.20								
Sales Recap		Amount	Destination	Amount	Qty	Avg	Department Labor		Amount	Lab %	Paid Outs	Amount		
Account For		4496.08	Dine In	593.79	51	11.64	Bartender		0.00	0.00	Total	0		
Account For (Less Disc)		4492.06	Drive Thru	3048.45	248	12.29	Busser		0.00	0.00				
Sales Tax		316.86	Go Order	141.38	15	9.43	Cashier		0.00	0.00				
Refunds		0.00	Uber Eats	391.58	24	16.32	Cook		0.00	0.00				
Discounts		4.02	Total	4175.20	338	12.35	Manager		0.00	0.00				
Non Sales Revenue		0.00					Hrs Used		47.75	0.00				
Net Sales		4175.20	Department		Amount	Qty								
Taxed Sales		3783.62	Beverage		247.00	107								
Voids		24.19	Discount		-4.02	3								
Bank Deposits		1020.69	Food		3932.22	1058								
Non Cash Tender		3469.85	Total		4175.20	1168								
Deposits Collected		0.00												
Paid Outs		0.00												
Short		-1.52												

Audits (top section) – quick service only

Note: In quick service operations, this report displays a list of cashier audits at the top of the page. Full service operations do not show itemized audits, as typically employees are using server banking. If you would like to see individual audits in full service, please refer to the Server Reports section.

The audits section is a summary of each of the employee’s cashier audits for the day. For a fully detailed, breakdown of each audit, you can go to the Cashier Audit report.

Start	Ending	Cashier	Register	Acct For	Disc	Void	Refund	Paid Out	Non Cash	Cash Collect	Skim	Expected	Total CID	+/-
12:00AM	08:18AM	Rios John	POS2	528.06	1.03	16.45	0.00	0.00	377.97	150.09	0.00	150.09	149.00	-1.09
12:03AM	08:20AM	Chase Rey	POS1	132.61	0.00	0.00	0.00	0.00	82.65	49.96	0.00	49.96	49.96	0.00
08:18AM	04:12PM	Florez Juan	POS2	1397.44	0.70	5.16	0.00	0.00	1167.01	230.43	0.00	230.43	230.00	-0.43
08:20AM	04:12PM	Lopez Lauren	POS1	262.39	0.00	0.00	0.00	0.00	152.30	110.09	0.00	110.09	110.09	0.00
04:12PM	11:58PM	Plato Patricia	POS2	1530.70	2.29	2.58	0.00	0.00	1254.32	276.38	0.00	276.38	276.38	0.00
04:13PM	11:57PM	Smith Hannah	POS1	640.86	0.00	0.00	0.00	0.00	435.60	205.26	0.00	205.26	205.26	0.00
				4492.06	4.02	24.19	0.00	0.00	3469.85	1022.21	0.00	1022.21	1020.69	-1.52

Term	Description
Start/Ending	This is the start and ending time of the audit
Cashier	Employee assigned to the audit
Register	Terminal name/number assigned to the audit
Acct For	Total revenue for the assigned audit Non Cash+ Cash Collected+ Paid Outs+ Tax <i>This does not include Discounts, Refunds, or Voids</i>
Non Cash	Credit cards, gift cards, and any other noncash tender used in the system (Uber Eats, GrubHub, etc).
Cash Collected	Total that should be in the drawer; excluding the beginning drawer amount.
Skim	If the drawer was skimmed (meaning excessive cash was removed from the drawer prior to closing the audit), this number is subtracted from the Cash Collected
Expected	This total is affected by the Skim amount. For example, if Cash Collected is \$100.00 and \$20.00 is skimmed, the Expected total would be \$80.00. When the drawer is NOT skimmed, the Expected total will match Cash Collected.
Actual CID	Total of the “actual” count of money in the drawer. +/- (Over/Short): Actual CID-Cash Collected= +/- OR Actual CID- (Expected+Skim). Excluding beginning drawer amount.

Sales by Hour

Itemizes sales by hour

The total in the Sales by Hour column is **Net Sales**

Hour	Dollars	Labor%	Tran	LY \$	LY Qty	+/-
10:00AM	522.54	0	36			
11:00AM	410.44	0	28			
12:00PM	447.39	0	41			
01:00PM	233.59	0	30			
02:00PM	233.59	0	24			
03:00PM	275.98	0	29			
04:00PM	275.40	0	20			
05:00PM	661.03	0	44			
06:00PM	241.69	0	20			
07:00PM	362.84	0	40			
08:00PM	257.87	0	16			
09:00PM	252.84	0	19			
Total	4175.20		347			4175.20

Term	Description
Dollars	Sales amount collected during the time interval
Labor %	This column is dependent on wages inputted into each employee's job titles. If you do not have pay rates, the percentages are 0.00. The hourly labor percentage divides the employees on the clock during the time interval by the dollars per hour.
Tran	Number of transaction for the time interval
LY \$	Last Year's Sales; used to compare sales from the previous year
LY Qty	Last Year's Transaction Quantity; shows the number of transactions per hour per the previous year
+/-	Difference between the current day's sales compared to last year's sales

Discount

Displays all discounts for the day

This total is included in the "Account For" under Sales Recap

Tenders

Displays all noncash tenders by credit card, gift card, plus any other custom added tender types

Sales Recap

This section is the finalized numbers for the day

Sales Recap	Amount
Account For	4496.08
Account For (Less Disc)	4492.06
Sales Tax	316.86
Refunds	0.00
Discounts	4.02
Non Sales Revenue	0.00
Net Sales	4175.20
Taxed Sales	3783.62
Voids	24.19
Bank Deposits	1020.69
Non Cash Tender	3469.85
Deposits Collected	0.00
Paid Outs	0.00
Short	-1.52

! The Sales Recap is the list of final numbers for the day. If any of the audits at the top and the Sales Recap can have contradicting numbers, **the numbers were changed after an audit was closed**. For example, the manager forgot to void a check while an audit was open. You can go to Transaction Review or through individual audits to pinpoint the discrepancy.

Term	Description
Account For	Net Sales + (Sales Tax + Special Tax) + Discounts
Account For (Less Disc)	Net Sales + (Sales Tax + Special Tax)
Non Sales Revenue	Non-sales revenue is payment collected in advance for a good/service and service charges. These are gift cards sold, payment deposits (for a preorder or event), service charges, delivery fees, and gratuity added to checks (as a service charge).
Taxed Sales	Tax Exempted Sales are the difference between Net Sales and Taxed Sales
Bank Deposits	The cash amount on hand that was entered in the system (total cash collected from each employee's audit).
Deposits Collected	Deposits Collected are prepayments or partial payments collected phone orders
Short (or Over)	Difference in the expected cash amount vs. bank deposits

Destination

Shows sales based on destination type; Dine In, To Go, Pick Up, Delivery or other custom added destination. The amount in this section is **Net Sales**. The **Qty** is the number of transactions for each destination. The **Avg** is the average sales amount per destination.

Destination	Amount	Qty	Avg
Dine In	593.79	51	11.64
Drive Thru	3048.45	248	12.29
Go Order	141.38	15	9.43
Uber Eats	391.58	24	16.32
Total	4175.20	338	12.35

Department Labor

This section is used with the integrated time clock and pay rates; itemizing all job titles clocked in for the day; If you do not have pay rates set for your employees, the Amount and Lab % columns are 0.00. Hrs Used is the total amount of hours logged for all employees between their clock in and clock out times.

Department Labor	Amount	Lab %
Bartender	0.00	0.00
Busser	0.00	0.00
Cashier	0.00	0.00
Cook	0.00	0.00
Manager	0.00	0.00
Hrs Used 47.75	0.00	0.00

Term	Description
Department Labor	Job titles clocked in
Amount	These numbers could be skewed based on your employees' pay rates. All wages need to be entered in order for MicroSale to properly calculate out the dollars and percentages. The amount is the total dollars spent for each job title for the day (sums the pay rates of each employee together by job title).
Labor %	The labor percentage is the net sales divided by the employees' pay rates.

Note: If you have job titles listed that you do not use, you can delete them in the register options.

Paid Outs

Lists all paid outs for the day. Paid Outs are expenses made by the restaurant. For example, \$25 was removed from the cash drawer for "Supplies"

Department

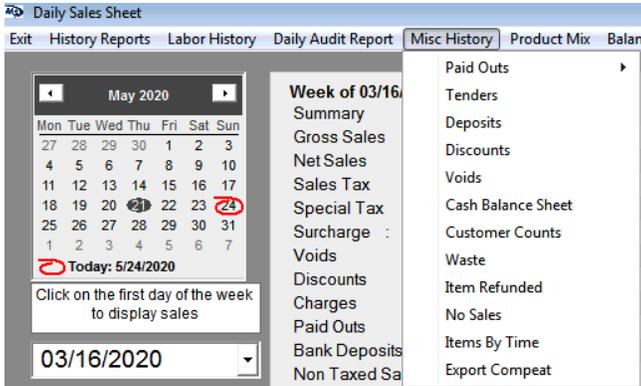
The department lists all departments in your menu. Usually this will be limited to Food, Beverages, Beer, and/or Liquor.

The total in the Department section is **Net Sales**. The Qty is the number of menu items sold within each department.

Department	Amount	Qty
Beverage	247.00	107
Discount	-4.02	3
Food	3932.22	1058
Total	4175.20	1168

Misc History

The Misc. History category includes reports for Paid Outs, Tenders, Deposits, Discounts, Voids, Cash Balance Sheet, Customer Counts, Waste, Refunds, No Sales, and Items by Time. The Miscellaneous Reports provide detailed information on how sales are being accrued by Tender Type, when Discounts and Voids are being applied and when Paid Outs are used.



Paid Outs

Paid Outs are expenses made by the restaurant. For example, \$25 was removed from the cash drawer for “Supplies”.

The Paid Out report can be displayed the following ways, Summary by Name, Summary by Description and List by Description. When the desired report is chosen, a date range calendar will appear. You may run the report for a single day or a range of dates. *You will not be able to choose the current day if the day has not been closed out.*

The Summary by Description and List by Description are very similar reports. The Summary by Name Report groups the Paid Outs by the category that was selected plus the total amount per category.

- The **Summary by Description** shows the Paid Out by the name that was entered for the Description of the Paid Out. Each descriptive name will also display the total amount for the Paid Out.
- The **List By Description** includes both the Summary by Name and the Summary by Description. It includes the Paid Outs by category and the descriptive name plus the amount total.

Tenders

The report lists all Non-Cash Tenders for a selected date range which includes Gift Cards, Credit Cards, and House Accounts. The report displays the Tender by name, the associated tip amount, and total amount of the tender. (Using the Tenders and Deposits together show the tender amounts performed).

Page 1		
Non Cash Tender History From 3/6/2020 To 3/6/2020		
Tender Name	Tip	Amount
Amex	79.96	2072.23
Discover	5.95	46.00
Gift Card	0.00	15.74
House Accounts	0.00	3099.38
MasterCard	183.74	1385.09
Visa	383.08	2158.78
Total		\$8777.22

Deposits

Deposits show the amount of money that was entered as a Cash Deposit for a specific day or date range. It is important to remember to put in Cash Deposits each day in order for your reports to be accurate. Cash Deposits entered are the only way for MicroSale to “know” the actual cash on hand. *Forgotten deposits can be revisited for adjustment.*

Page 1	
Deposit Report From 3/7/2020 To 3/8/2020	
Name	Amount
Deposit	\$1480.13
Total	\$1480.13

Discounts

The Discount report displays information on the type of discount, the total dollar amount, and the total quantity for the discount in the selected date range. The report will help you track how often a discount is being applied at your store. **For more information on discounts, please refer to the Voids and Discounts section of this guide.**

Cash Balance Sheet

The Cash Balance Sheet gives a breakdown of the cash collected, paid outs, cash refunds, non-cash tips (as noncash tips affect the cash amount), and cash deposits collected.

Page 1	
Gregg 1221 W. B Cash Balance Rep	
Report Date 04/08/2020 01:25 PM Printed By New Employee	
Name	Amount
Cash Collected	291.82
Cash Adjustments	1232.01
** Paid Outs	100.00
** Cash Refunds	525.00
** Tips Paid	1264.11
** Cash Paid In	-657.10
Cash Deposit	-940.19
POS Cash	1590.26

Customer Counts

The Customer Count Report gives a breakdown by meal periods based on customer counts, sales amounts, and the sales percentage based on those two totals.

Meal Name	Qty	Amount	Average
Dinner	78	2812.01	36.05
Late 1 9-10	20	651.71	32.59
Late 2 10-1	25	531.29	21.25
Lunch	16	4225.92	264.12
Total	139	8220.93	59.14

Waste

The Waste report is generated data from using the “Waste” function. When items are entered on a check and marked as “Waste”, the check automatically closes. The Waste function is used to track waste as it happens, such as a spill, wrong order, burnt food, etc.

Note: To view this report with live data for the current day, use Sales Report (top left of Reports menu) and select Daily Waste.

Item Refunded

This report works with the “Item Refund” function button. Item Refund allows you to refund single items on the order screen. The Item Refunded report generates all refunded items within the date range selected.

Voids

The Void Report is sorted by check number; displaying the Menu Item and the price associated with the Menu Item. The reason for the void, the server and the manager name is also displayed. This places accountability on whoever is voiding transactions. **For more information on voids, please refer to the section on Discounts and Voids in this guide.**

Note: To view this report with live data for the current day, use the Current Week Voids report on the Reports Menu

No Sales

The No Sales report generates a log of employees that have used the “Open Drawer” function without an associated sale. The log includes the register name/number, the employee and date/time that the function was used.

Items By Time

The Items by Time Report gives a detailed breakdown of every transaction based on the time it was rang in, the price of each item, the revenue center it was rang in under, and the check number for each server’s and bartender’s audit.

Export Compeat

Exports data to Compeat (requires integration purchase).

Balance Sheet

The Balance Sheet is populated from Historical Data. The report can be chosen for a single day or selected date range of closed days. **The balance sheet is used to compare the products sold (Total Revenue) and the payments collected (Total Accounted).**

Daily Balance Report For 03/06/20 to 03/06/20

Total Revenue		Total Accounted	
	Totals		Totals
Departments Sales		Credit Cards	
AXE THROWING	2026.00	Amex	2072.23
Beer	360.00	Discover	46.00
Can Wine	28.00	MasterCard	1385.08
Draft Beer	583.50	Visa	2158.78
Draft Wine	122.25	Sub Total	\$5662.10
ESCAPE ROOMS	145.00	Non Cash Tenders	
FOOD	1961.83	Gift Card	15.74
** FOOD Discount	-64.62	House Accounts	3099.38
** FOOD Net	1897.21	Sub Total	\$3115.12
Liquor	1568.00	Total	\$8777.22
NA BEV	85.17	Paid Outs	\$100.00
Time Card	770.00	Discounts	\$74.82
Total *(Net of discounts)*	\$7619.75	Less Dept Disc	\$10.20
Gift Certificate Sales		Bank Deposits	\$0.00
Account Payment	564.12	Over	937.53
Total	\$364.12		
Service Charges/Fees			
Service Charge			
** 3% Service Charge	92.98		
Total	\$92.98		
Sales Tax Collected			
Sales Tax 1	420.64		
Sales Tax 2	206.79		
Total	\$627.43		
Tips Withheld			
Corkies 0	652.73		
Total	\$652.73		
C.C. Fee Income			
Tip Fee Income	7.00		
Total	\$7.00		
Refunds			
REFUND(CREDIT CARD)	-594.12		
Deposit Refund(CASH)	-325.00		
Deposit Refund(CASH(CREDIT))	-325.00		
Total	-\$1244.12		
** ACCOUNT FOR	\$7949.89	** ACCOUNTED FOR	\$7949.89

** Gross Sales **	** Net + Discounts **	** Net Sales **	** Voids **	** Not Taxed **
\$9010.85	\$6070.25	\$3954.43	\$38.00	0.00
** Grand Total **	** Cash Tenders **	** Non Cash Tips **	** Gratuity **	** Cash Tenders **
\$6629.86	291.82	632.73	\$611.38	291.82
** Transaction Avg \$42.82	Tran # 140	Trans \$ 5955.43	Cust Ct 139	

The Balance Sheet has 3 Sections; Total Revenue, Total Accounted, and a Simple Recap

- The Total Revenue breaks out into department sales. The total revenue includes discounts because discounts are not necessarily linked to any specific menu department or item.
- Gift certificate sales and service charges/fees are considered non-sales revenue.
- If the option is set to withhold employee's tips to be paid out on their paychecks then they will show on the balance sheet and be added to the deposit total for the day.
- A credit card tip fee can be setup to charge employees a percentage based on their credit card sales by card type.

How to analyze the balance sheet

Term	Description
Gross Sales	Grand total of all sale transactions without any deductions (excluding tax) Gross Sales includes (adds) discounts, voids, refunds and all non-sales revenue
Net Sales	Net sales is what remains after all discounts, voids and service charges have been removed from gross sales (excluding tax) Net Sales = gross sales – discounts – voids – refunds – non-sales revenue
Non-sales Revenue	Non-sales revenue is payment collected in advance for a good/service and service charges. These are gift cards sold, payment deposits (for a preorder or event), service charges, delivery fees, and gratuity added to checks (as a service charge).
Account For	This number makes up all of your sales transactions. It includes discounts, service charges and tax. Does not include voids.
Accounted For	This number accounts for the 'account for' sales.
Cash to Account for	Actual cash amount that you should have on hand; <i>after claimed tips are removed</i>
Grand Total	Net Sales + Sales Tax + Non Sales Revenue
Accounted For Total	All noncash tenders, plus taxes and tips, plus discounts plus expected cash total (already has noncash tips and service charges deducted).
Adjusted Gross	Net sales + Non Sales Rev + Net Sales Tax + Liquor Tax + Tip Fee Income. Gratuity is included by configuration.
Bank Deposits	Deposits are physically counted cash amounts from cash drawers and then entered into the system. This amount should be your expected cash amount. If the number entered is higher or lower than the expected cash, reports show an over/short value.
Gratuity	A gratuity is automatically or manually added to a check before the customer pays. This is a service charge; and not a regular tip. Gratuity automatically added to checks. (Example: an auto 18% Gratuity on a party or a server adding in a Gratuity to a customer's bill)

Total Revenue (left side) of Products Sold

Net Sales = Gross sales – discounts – voids – gratuity (service charge gratuities)

Gross Sales = Net Sales + Discounts + Voids + Refunds + Non Sales Revenue (excludes sales tax)

Adjusted Gross = Net Sales + Non Sales Revenue + Tax + Tip Fee Income + Service Charges

Grand Total = Net sales + Tax + Non Sales Revenue

Subtract non-cash tenders get the **expected cash deposit amount**

Over/short for the bank deposit is a negative number if the expected cash deposit is not entered or if the inputted number is different than the expected. There can also be an overage if there was not enough cash collected to cover the non-cash tips or gratuities.

How the balance sheet works

- The left side (product sold) is the **gross sales** plus **discounts** of the product sold based on *department sales* totals plus **sales tax** which equals the **account for total**
- The right side (payments) is the **non-cash tenders total** plus the **discounts** total plus the **expected cash deposit total** which equals the **accounted for total**
- The total cash tenders minus the non-cash tips minus gratuity equals **cash less tips** which is also the **expected cash deposit amount**. This information is located towards the bottom of the balance sheet.
- In summary, take the **non-cash tenders total**, which includes sales tax and tips and add the discounts, plus the expected cash total (which already has the non-cash tips and gratuities deducted) which equals the **accounted for total**

Account for Total Revenue Formula

Total Department Sales
+ Sales Tax Collected
-Refunds
= **Account for Total Revenue**

The Total Accounted side (right side) itemizes revenue sources;

- Credit card tenders
- Non-cash tenders (gift cards redeemed, third-party delivery tender types used)
- Discounts
- Paid Outs
- Bank Deposits; (cash) how much cash you entered

An OVERAGE is a surplus of Cash; it needs to be removed from the Accounted For) An overage showing without a deposit being entered means that there was not enough cash collected from sales to cover the non-cash tips and gratuities

Labor: itemized by job title and labor dollars spent (based on entered pay rates)

The labor percentage is the labor dollar amount divided by net sales

Sales Recap (History)

The Sales Recap displays department sales and discounts for menu items in a selected date range based on Historical Data (closed days' information). The report also displays Gross Sales, Voids, Sales Tax, Refunds and a simple balance of cash accounted. This report is useful when you want to view sales by department for a closed day or range of days.

Each Department includes the quantity of menu items sold and the dollar amount of the menu items sold. The bottom of the reports shows payments which will display credit card payments with the quantity of transactions, the dollar amount and the amount of tips claimed on credit cards.

The Discounts section shows the type of discounts used, the quantity, and the total dollars. *This is a good way to track how often discounts are being used during a selected period.*

MicroSale 1221 W. Brandon Blvd. Brandon			
Daily Sales Recap From 8/22/2012 To 8/22/2012			
DEPARTMENT SALES			
	QTY	DOLLARS	
Beer	12	38.50	
Bone-In	901	552.81	
Boneless	255	186.96	
Combos	2503	1962.78	
Discount	4	-69.50	
Non-Alcoholic	62	94.22	
Sides	179	214.15	
Split	8	7.99	
TOTAL		2987.91	
PAYMENTS (Cash Not Included In Total)			
	QTY	DOLLARS	TIPS
Amex	2	36.08	0.00
Discover	1	24.12	0.00
MasterCard	17	322.72	0.00
Online Ordering	1	18.54	0.00
Visa	52	987.69	0.00
TOTAL		1389.15	
DISCOUNTS			
	QTY	DOLLARS	
10 % Discount	2	2.75	
Made Not Sold	2	66.75	
TOTAL		69.50	
SALES		DOLLARS	
Gross Sales		3101.97	
Voided Sales		44.56	
Sales Tax		243.23	
Special Tax		0.00	
Surcharge		0.00	
Non-Sale Revenue		0.00	
Net Sales		2987.91	
Refunds		0.00	
TOTAL TO ACCOUNT FOR		3231.14	
CASH TO ACCOUNT FOR		1841.99	

2987.91
 +69.50 (discounts)
 +44.56 (voids)
 +0.00 (refunds)
 +0.00 (non sales rev)

3101.97 GROSS SALES

Formulas Used:

Gross Sales: Net Sales + discounts + voids + refunds + non sales revenue (gift cards sold, service charges, + gratuity) *(NO sales tax included)*

Non Sale Revenue: gift cards sold + deposits + service charges + gratuity

Net Sales: Gross Sales – voids – discounts – refunds – non-sales revenue *(NO sales tax included)*

Total to Account For: Net Sales + Taxes (Sales Tax + Special Tax) + Non Sale Revenue

Cash to Account For: Cash that MicroSale 'thinks' you should have on hand (after tips are taken out)

“Find Top 10 Sales For” Reports

The Top 10 Sales Reports are gathered in the Daily Sales Summary area (involving only historical data). The report is located on the toolbar. The Top 10 Sales Report is a useful way to view your top or bottom grossing sales for the past two years (approximately 730 days by default)

When drilling down into the Top 10 or Bottom 10, a bar chart will appear along with the listed days. The list is in descending order by sales (not by date). The sales will show a total of 11 days to show you the difference in sales not included in the Top/Bottom 10

Weekly Graphs

Accessed by the Daily Sales Summary Report on the toolbar, the Weekly Graphs reports offer a wide selection of reports in a pie chart format. The reports are useful when you would like to see a visual breakdown of your sales numbers compared by day for the week.

The screenshot shows a software interface with a menu bar at the top containing: Exit, History Reports, Labor History, Daily Audit Report, Misc History, Product Mix, Balance Sheet, Sales Recap, Find Top 10 Sales For, Weekly Graphs, Edit, and Period Reports. Below the menu bar is a calendar for April 2020 with the 8th day circled in red. To the right of the calendar is a table titled 'Week of 03/16/2020' with columns for days of the week (03/16/20, 03/17/20, 03/18/20, 03/19/20, 03/20/20, 03/21/20, 03/22/20) and rows for various sales metrics. A 'Weekly Graphs' menu is open, listing: NetSales, Discounts, Labor %, Labor Hours, Voiced Sales, Department Sales, Meal Period Sales, and Over/Short. Below the table, there are two columns of totals: one for the week (03/16/20) and one for the current day (Today: 4/8/2020).

	03/16/20	03/17/20	03/18/20	03/19/20	03/20/20	03/21/20	03/22/20	Today: 4/8/2020
Summary								
Gross Sales	545.99	0.00	0.00	0.00	0.00	0.00	0.00	
Net Sales	495.42	0.00	0.00	0.00	0.00	0.00	0.00	
Sales Tax	26.79	0.00	0.00	0.00	0.00	0.00	0.00	
Special Tax	14.11	0.00	0.00	0.00	0.00	0.00	0.00	
Surcharge :	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Voids	6.00	0.00	0.00	0.00	0.00	0.00	0.00	
Discounts	44.57	0.00	0.00	0.00	0.00	0.00	0.00	44.57
Charges	594.56	0.00	0.00	0.00	0.00	0.00	0.00	594.56

Information available in pie chart format:

- Net Sales
- Discounts
- Labor Percentage
- Labor Hours
- Voiced Sales
- Department Sales
- Meal Periods
- Over/ Short

Period Reports

A 13-period calendar splits the year into 13 four-week periods rather than 12 months of varying lengths. A 13 period calendar is useful for accounting purposes, such as comparing sales figures. MicroSale will automatically make a 13-period calendar for you. Depending on when you start your week (for example many restaurants start on Monday rather than Sunday), that first day in January is the start of the 13-period cycle and increments exactly 4 weeks.

Additional Sales Summary Reports

Hourly Sales

📍 Managers Menu > Reports Menu > **Hourly Sales**

This report is generated from closed sales data (historical sales).

The Hourly Sales Report is available for print on a receipt printer or viewable/printable when attached to a report printer. The example below is a PDF view of the report.

The report is useful when you would like to view a summary of sales specifically by hour for a certain day or range of days. This could help management understand sales trends by hour based on a day, week or year. Example; sales are extremely high for the hours of 12:00 PM-2:00 PM then drastically drop off at 3:00 PM. A happy hour from 3:00 PM- 6:00 PM could help increase sales numbers in the slow times.

Hourly Sales Periods From 2/6/2013 To 2/6/2013		
HOURS	DOLLARS	QUANTITY
6:00 AM	\$1.99	1
7:00 AM	\$75.17	51
8:00 AM	\$94.20	84
9:00 AM	\$73.99	75
10:00 AM	\$121.37	77
11:00 AM	\$61.59	73
12:00 PM	\$135.02	118
1:00 PM	\$92.62	69
2:00 PM	\$72.04	58
3:00 PM	\$23.71	12
4:00 PM	\$24.79	20
5:00 PM	\$46.76	29
6:00 PM	\$23.38	16
Total Sales For Period		
	\$846.63	683

The report specifies which day's (or days') data are being used (above From 2/6/2013-2/6/2013), the hours of sales (above, the restaurant is only open from 6:00 AM- 6:00 PM), the sales (in dollars) for that time, and the quantity of menu items sold.

i **To view the current day's hourly sales:** If you would like to view the current day's hourly sales, please go to the **Sales Report** button on the main page of the Reports Menu (hourly sales are located on the dashboard screen and available through the "Hourly Sales" button on the bottom of the dashboard).

i **To view sales by time intervals (Meal Periods)** such as breakfast, lunch, and dinner, go to Reports Menu > **Meal Period Sales**

Sales by Register Group Report

Managers Menu > Reports Menu > **Register Group Sales**

The Sales by Register Group displays department sales and discounts for menu items in a selected date range by groups of terminals (registers). You will assign terminals to a register group to separate sales from other register groups to utilize this report. The report will display the total sales for all register groups as well as the total sales for the business.

The report is useful to determine which area is generating the most sales by examining the total sales from each register group; such as a "Bar" Group, "Patio" Group, "Main" Group, etc. The report will also provide information on gratuities, discounts and service charges applied.

Sales by Terminal

Managers Menu > Reports Menu > **Sales By Terminal**

The Sales by Terminal displays separated sales information for a selected date range. The Sales by Terminal Report is useful for Quick Service establishments to see which terminals are generating the most sales.

The report provides the terminal name, gross sales, tax, and net total. The report is generated with history data, meaning that it will only offer information on the current day after the close out is completed.

Page 1	Micro\$ale 1221 W. Brandon Blvd. Register Name From 01/01/2012 to 12/20/2012		
Report Date 12/20/2012 11:26 AM Printed By Meg D			
Register	Gross Total	Tax	Net Total
POS1	516402.08	38993.86	477408.22
POS2	520244.96	39368.62	480876.34
POS3	1081.02	81.82	999.20
** Total >>	\$1037728.06	\$78444.30	\$959283.76

Sales Tax: Sales History Report

📍 Managers Menu > Reports Menu > **Sales Tax**

The Sales Tax Report is a date range report based on historical data (closed days). The report is useful to view a day's or a range of days' sales and tax information. The report is available for print on a 40-column printer or viewable as a PDF when attached to a Report Printer.

Sales By Tax Rate	Amount
Non Taxed	611.38
Sales Tax 1	5173.12
Sales Tax -1 Spc Tax 0	-74.82
Spc Tax 1	2505.25
Spc Tax 2	6.00
Tax Collected	Amount
Reg Sale Tax	420.64
Spc Sale Tax	206.79
Surcharge/Tax	0.00

Term	Description
Non Taxed	Tax exempted sales or menu items
Sales Tax 1:	Sales total that tax was collected on using the regular tax rate, or tax table 1.
Sales Tax -1 Spc Tax 0	Sales Tax that was deducted due to the use of discounts.
Spc Tax 1	Sales total that tax was collected on using the special tax table 1. This is normally collected on alcohol sales or sales based on their order destination. Please refer to your local and state tax requirements for further information on how tax is collected in your area.
Spc Tax 2	Sales total that tax was collected on using the special tax table 1. This is normally collected on alcohol sales or sales based on their order destination. Please refer to your local and state tax requirements for further information on how tax is collected in your area.
Reg Sale Tax:	Sum of tax collected under sales tax table 1.
Spc Sale Tax	Sum of tax collected under the special tax tables.
Surcharge/Tax	Sum of Surcharges taken based on the non-sales revenue. An example of a surcharge is a delivery fee or non-cash adjustment.

Live (Current Day or Week) Sales Summaries

Sales Summaries allow you to see summarized sales numbers of your revenue. The reports are designed for a more generic overview of sales comparative to Menu Item Reports. The summaries provide hourly, daily, weekly or a range of information organized by category, department, group, payment, tax, etc.

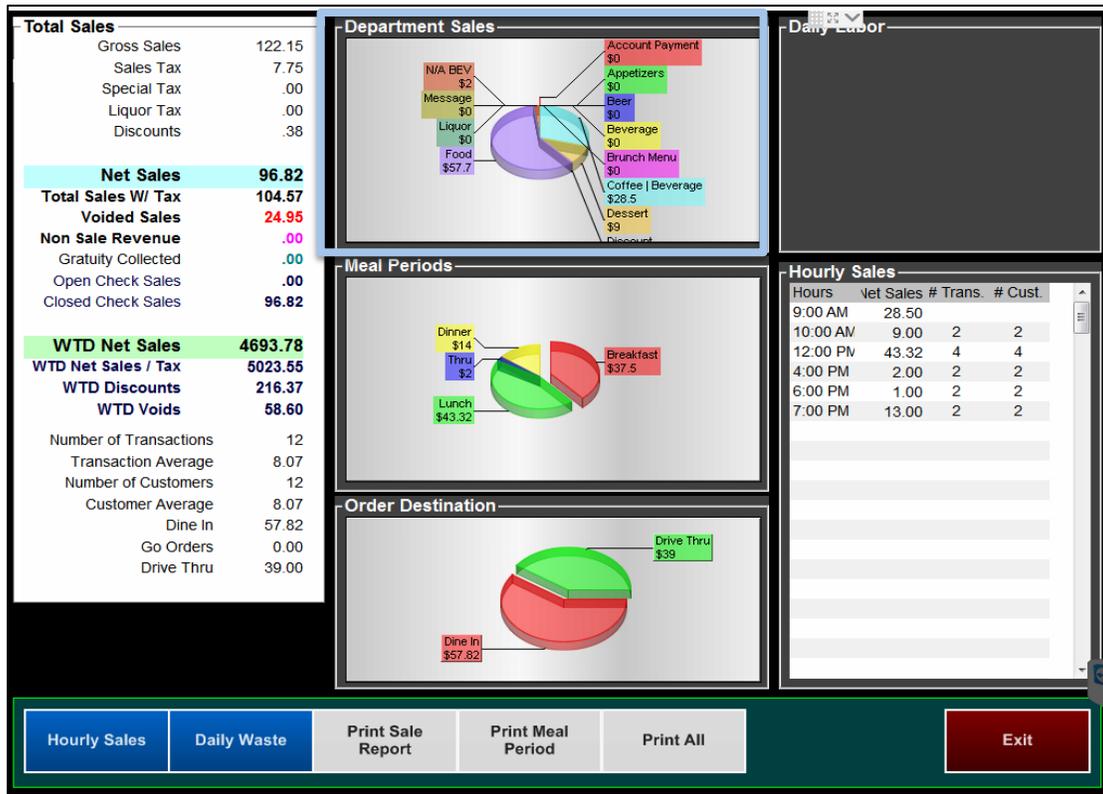
Sales Summaries reports at a glance

Term	Description
Sales Report Dashboard (Live Data)	The dashboard is designed for an “at the glance” view to quickly see data for the current day (called Sales Reports, top left button on Reports Menu)
Category/Department	Useful to see daily or week’s sales summarized by category and department
Today’s Sales Recap	Useful when you would like to quickly see the current sales for the day. The report is available for print on a 40column printer or viewable as a PDF when attached to a Report Printer.
Daily Sales Summary Dashboard	The dashboard is useful for viewing sales data for the day/week quickly, editing deposits, viewing weather or memos, accessing sales trends and reprinting the daily close out.
Hourly Sales	Useful when you would like to view a summary of sales specifically by hour for a certain day or range of days
Payment Report	The report is useful when a manager or employee needs to view sales based on payment types for the current day, week to date, or individual days in the current week. (Called Check Payments)
Sales by Register Group	Useful to determine which area is generating the most sales; such as a “Bar” Group, “Patio” Group, “Main” Group, etc. The report will also provide information on gratuities, discounts and service charges applied.
Sales by Terminal	The Sales by Terminal Report is useful for Quick Service establishments to see which terminals are generating the most sales.
Sales Tax	The report is useful to view a day’s or a collection of a range of days’ sales and tax information.

Sales Report Dashboard

📍 Managers Menu > **Sales Reports** (top left button)

The Sales Report Dashboard is located on the main page of the Reports Menu. The dashboard provides critical summary data for the current day. The dashboard is designed for an “at the glance” view to quickly see data.



Term	Description
Average Time @ Window	is used for restaurants that offer Drive Thru services (using the Drive Thru Terminal Settings)
Average Table Time	is used for restaurants that offer table services (using Full Service Terminal Settings)
Labor Rates	Since Labor Rates are not required in the system, you may discover that the Labor Information is blank. To get the most out of your system (including all Time Clock Reports), please put in the employees' rates of pay in the Employee Maintenance Section (more instruction is listed in the introductory of the Report Manual)
Print	If the terminal is connected to a report printer, the function buttons populate a PDF view of summary data. The reports print automatically on 40-column paper if attached to a receipt printer.
Hourly Sales	The Hourly Sales displays sales by the hour, number of transactions (payments), and number of customers (if applicable).

Today's Sales Recap

📍 Managers Menu > Reports Menu > **Today's Sales Recap**

The Recap is a summary of the current day's sales (the open day). The Today's Sales Recap is useful when a manager or staff member would like to quickly see the current sales for the day. The report is available for print on a 40-column printer or viewable as a PDF when attached to a report printer.

A similar report is located in the Daily Sales Summary under "Sales Recap", which offers a recap on closed sales. The report displays sales organized by department, with the number of menu items sold in each area, total dollars, and the percentage of sales each department generates.

Payments (form of payment for sales) list the types of payments used such as Cash, Visa, American Express, Gift Card Charges, and/or House Account Charges. The Quantity is the number of transactions that used that specific type of payment.

MicroSale 1221 W. Brandon Blvd. Brandon			
Daily Sales Recap			
01/22/2013			
DEPARTMENT SALES	QTY	DOLLARS	PERC %
Food	13	74.67	%65.9512
Liquor	7	30.23	%26.7002
Wine	2	8.32	%7.3485
TOTAL		113.22	
PAYMENTS	QTY	DOLLARS	TIPS
Cash	4	122.58	0.00
TOTAL		122.58	0.00
DISCOUNTS	QTY	DOLLARS	
TOTAL		0.00	
SALES		DOLLARS	
Gross Sales		113.22	
Voided Sales		0.00	
Sales Tax		9.36	
Special Tax		0.00	
Surcharge		0.00	
Non Sale Revenue		0.00	
Net Sales		113.22	
TOTAL TO ACCOUNT FOR		122.58	
CASH TO ACCOUNT FOR (less tips)		122.58	
gratuity not included in total			

Formulas Used	
Gross Sales	Net sales + discounts + voids + refunds + non sale revenue (gift cards sold, service charges, + gratuity) (<i>Tax excluded</i>)
Non-sales Revenue	gift cards sold + deposits + service charges + gratuity
Net Sales	Gross sales – voids – discounts – refunds – non sale revenue (<i>Tax excluded</i>)
Total to Account For	Net sales + sales tax + non sale revenue
Cash to Account For	Cash that MicroSale 'thinks' you should have on hand (after tips are taken out)

Category and Department Sales

Managers Menu > Reports Menu > **Category and Department Sales**

The report is available for the current day's information (touch "Daily") and Week to Date. The Week to Date is based on the current week's information; information accrued after the last weekly close out.

The Category/Department Report is useful to see your daily or week's sales summarized by category and department. The report is available for print on a 40-column printer or viewable as a PDF when attached to a Report Printer.

Payment Report

Managers Menu > Reports Menu > **Check Payments**

The report is useful when a manager or employee needs to view sales based on payment types for the current day, week to date, or individual days in the current week. There is also the option to view payments by hour in the day(s) selected. The report is available for print on a 40-column printer or viewable as a PDF when attached to a Report Printer.

If the establishment accepts tips, there will be the total tip amount for each payment type. The Cash Tip Amount is the total tips claimed at the end of servers' shifts.

Page 1		
Micro\$ale 1221 W. Brandon Blvd. Daily Payment Report Monday		
Report Date 01/22/2013 10:19 AM Printed By Meg D	Payment Amount	Tip Amount
Amex	\$72.14	\$0.00
Cash	\$955.74	\$0.00
Discover	\$37.45	\$0.00
Master Card	\$255.80	\$0.00
Visa	\$526.67	\$0.00
Total Payments	\$1847.80	\$0.00

Revenue Centers

Managers Menu > Reports Menu > **Revenue Centers**

The Revenue Centers report displays department sales and discounts by groups of terminals for the current day or week. This report is only used for establishments that groups registers together (such as "Patio", "Main Bar", etc).

The report is useful to determine which area is generating the most sales by examining the total sales from each register group; such as a "Bar" Group, "Patio" Group, "Main" Group, etc. The report will also provide information on gratuities, discounts and service charges applied.

Menu and Menu Sales Reports

Menu and Menu Sales Reports are product mix reports that show how revenue is being generated.

Menu Item Sales Reports at a glance

Report Name	Purpose
Current Week Sales Mix	Useful to view the current week's (or days) sales broken down by category per menu item
Daily Menu Item Inventory	Useful to track single menu items to see the actual on hand amount
Inventory Usage	Useful to track menu items that make up a whole or to track menu items made up by recipes/components
Menu Items by Individual	Useful for sales contests with employees or to customize your own product mix report
Mix by Department	Useful to view the current or past day's sales broken down by department per menu item
Mix by Revenue Center	The report will help you see which days generate the most sales by area and will also allow you to track reopened checks and tables
Print Utilities	Useful to print out lists of menu items and/or modifiers, inventory, and PLU numbers if applicable
Product Mix Daily by Hour	Useful to view menu items sold by hour for the current week (week that has not yet been closed out)
Product Mix Today by Hour	Useful to view menu items sold by hour for the current day
Product Mix WTD by Hour	Shows total sales of menu items by hour for the current week
Product Mix	Useful for determining which menu items and modifiers are most and/or least popular (History Report: not based on current/open days)
Sales Mix by Meal Period	Useful to see menu items sold by category in each meal period (breakfast vs. lunch vs. dinner)

Current Week Sales Mix Report

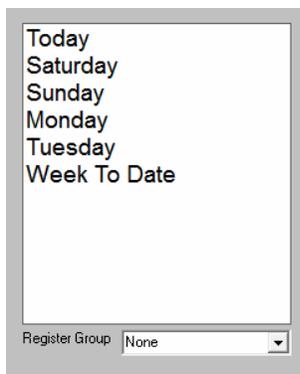
📍 Managers Menu > Reports Menu > Menu and Menu Sales > **Current Week Sales Mix**

This report can be generated based on live data for the current day, any day in the current week or the week to date (based on the first day after the last weekly closeout).

The data in this report categorizes menu items sold within each menu category.

Running the report:

- 1 Select the **Current Week Sales Mix** button
- 2 On the following prompt, you can choose “Today”, any day in the current week, or Week To Date
The list may appear in a different order, depending on the first day of your business week



A screenshot of a software dialog box for selecting a report period. The dialog box has a light gray border and a white background. Inside, there is a list of options: "Today", "Saturday", "Sunday", "Monday", "Tuesday", and "Week To Date". Below the list is a dropdown menu labeled "Register Group" with "None" selected.

The report contains information about the category sales, individual sales and percentage sales. Each menu item includes the quantity sold, total amount of sales for each item, and percentage of sales (total dollar amount of the item divided by total sales for the day). These columns also include the sales by category and the quantity of all items within each category.

Menu Inventory Report

For more detailed inventory, you can use the Inventory Module (included at no charge in Version 10). This report is useful for tracking simplistic menu items such as bottled beer or other items sold individually (without sides, advanced modifiers, etc).

Daily Menu Inventory (Simple Inventory Counts)

Adding inventory counts

📍 Managers Menu > Menu Maintenance > **Menu Items and Pricing (Select a menu item)**

There are two sections you can fill out on the menu item; one is **Number Available** which will show the tracking of the product **on the menu item button and countdown to an 86 (not allow any more items to be rang in until restocked)**. The second is **Product Inventory** which will track the **product being sold for the report** (when this number goes to zero, it can continue to be rang in).

Running the daily menu inventory report

📍 Managers Menu > Reports Menu > **Daily Menu Inventory**

This will only display the Menu Items that are set up with Product Inventory in the Menu Items and Pricing section

- The **Sales** quantity is the amount of items sold since the **Beginning** inventory
- **On Hand** is the **Beginning** Amount *minus* the **Sales** Amount.
- The **Count** has a space for the manual count of the inventory
- **Deviation** is the difference between the manually entered **Count** and the **On Hand**

Report Date 03/03/2013 10:13 AM Printed by John Smith					
Item	Beginning	Sales	On Hand	Count	Deviation
Bud Light	100	17	83	- <u>82</u>	= <u>1</u>
Miller Lite	100	22	78	- _____	= _____
Bud Select	100	1	99	- _____	= _____
Amberbock	100	9	91	- _____	= _____
Mich Ultra	100	11	89	- _____	= _____

Inventory Usage

The Daily Menu Inventory report tracks menu items sold while the Inventory Usage tracks recipes used within the menu items.

📍 Managers Menu > Reports Menu > **Inventory Usage Setup**

The Inventory Usage feature is a tool to help you track recipes, menu components, and simple inventory.

The Inventory Usage is used for:

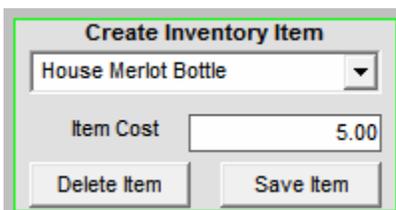
- A. Tracking menu items that make up a whole.
- B. Tracking a whole that is made up of single items.

Examples:

1. You sell glasses of wine. You want to know how many bottles of wine you should have in your inventory. (glasses of wine in ratio to bottle)
2. You sell a Mixed Drink. You want to know how much of the inventory is being used for that item. (mixed drink in ratio to 4 oz of Red Bull, 1 oz of Grey Goose.)

Inventory Usage Setup

What are the menu items being taken from? Case of Bud Light, House Merlot Bottle
How much did that unit cost? Bottle of Wine: \$5.00 Press the gray Save Item button in the green oval.



The screenshot shows a web form titled "Create Inventory Item". It features a dropdown menu with "House Merlot Bottle" selected, an "Item Cost" input field containing "5.00", and two buttons at the bottom: "Delete Item" and "Save Item". The form is highlighted with a green border.

Linking inventory to menu items

Press Load Menu from Mix. (this will list all menu items including shifts and modifiers; menu file list will only show menu items that are on buttons)

The green box is only used to input the Inventory Item. You will not need this in linking the menu item to the inventory item. Please view screen shot below for better understanding. Once you complete the link, press the green Save Button.

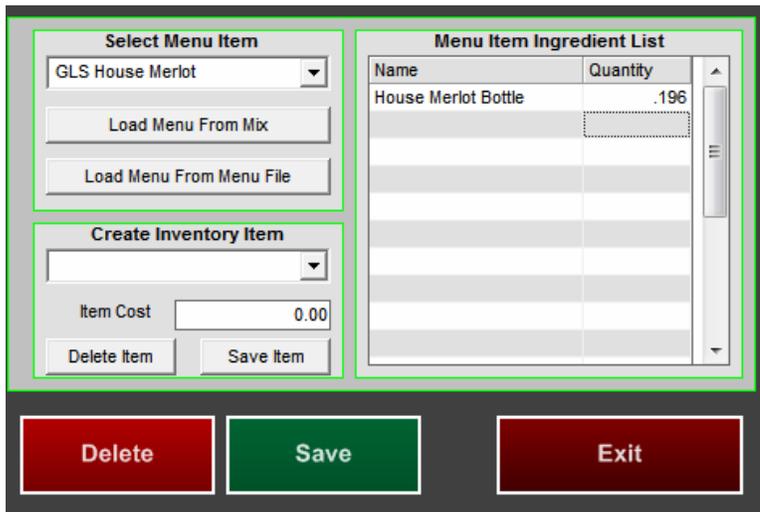
Ask yourself: how many glasses of wine can I get from this bottle? Read ounces on the bottle and measure how many ounces are in your restaurant's wine glass.

>Our glasses are served with 5 oz. of Wine.
5 oz= 1 glass

>ounces of wine are the variable. (this example the wine is 25.4 oz)

Formula: Glass Ounces/Bottle Ounces
 $5\text{oz}/25.4=19.6\% \sim .196$

Each glass of wine is 19.6% of the bottle.



Name	Quantity
House Merlot Bottle	.196

Running the report

📍 Managers Menu > Menu and Menu Sales > **Inventory Usage**

At the end of the day, after your close out is complete, go to back to the Menu Reports and find the Inventory Usage button (above Exit). Depending if you are on a computer that has a reports printer, you may view the report on screen; otherwise the report will print on your receipt printer. The report will show how many bottles of wine you went through, plus your cost and percentage.

Menu Item(s) by Individual Report

📍 Reports Menu > Menu and Menu Sales > **Menu Item(s) by Individual**

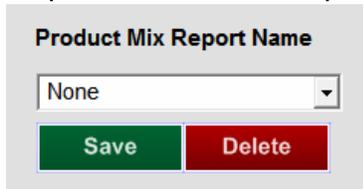
The Menu Item(s) by Individual Report is a customized product mix report that shows sales of menu items based on the current day or closed sales data. You can filter specific sales and save your custom report to use at a later time.

⚠️ **By default, the list shows all items saved from the “Menu Database” which is the list of items saved in the POS. The Sales History shows the actual items sold (with shift levels, special modifiers, etc). For a more precise sales mix, click the “Load Sold Menu Items from Sales History”**

- 1 Choose which items you want to view on the report
 - a. Choose **Select All** to choose all menu items
 - b. Select individual items by ticking next to items in the list or
 - c. Select items by category (using the dropdown under “Select By Individual Category > click on **Select Category**)



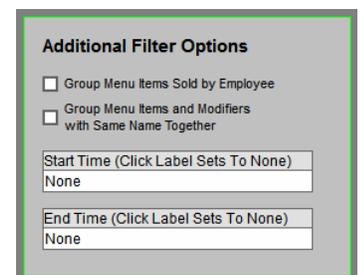
- 2 Once the menu items are selected, it can be saved for future usage by typing a report name under “Product Mix Report Name”. **Press Save.** (to retrieve the saved report, select the report name from the dropdown and run the report for today or a date range)



- 3 After the desired items are selected, you can select **Today** or **Select Date Range** to run the report

Additional Filters

- To view the product mix report separated by each employee who rang the items, tick the checkbox, **Group Menu Items Sold by Employee**. This option is ideal for server contests to see who rang in the most of a particular menu item
- To view the product mix report with the menu items and modifiers with the same name together as one single item (example; you may have Coke as a menu item and Coke as a modifier), tick the checkbox, **Group Menu Items and Modifiers with Same Name Together**. With this unchecked, you will see Coke twice as two separate items in the report.



View product mix by time or date range

- 1 To view the product mix report based on a particular time frame, select a **Start Time** and **End Time**
- 2 Typically, you will leave the Start and End Time at “None” in order to view an entire day’s sales
- 3 Select “Today” to view the current day or Select Range to choose any date range desired

Mix by Category/Department Report

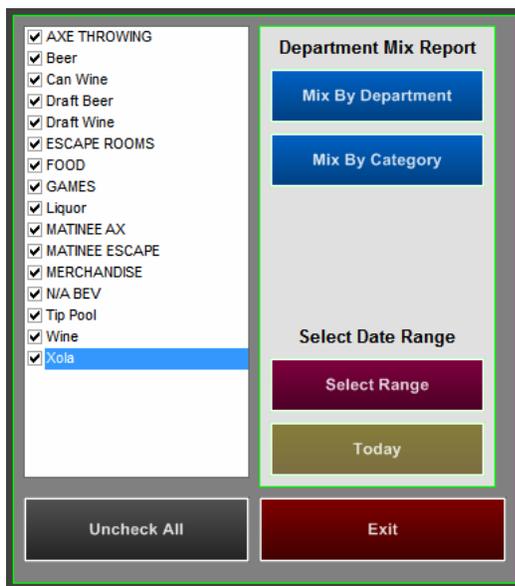
Managers Menu > Reports Menu > Menu and Menu Sales > **Mix by Category Department**

The Mix by Category/Department shows sales of Menu Items by selected Categories or Departments. The report will also change during the day if you are viewing the current day instead of a past time period.

The Menu Items are broken down by Category or Department depending on which option you select. Each Menu Item includes a column that displays the Quantity, Sales Dollars, Cost, and Profit Percentage.

Steps to run either the Mix by Category or Department Report:

1 Select Mix by Category/Department



The screenshot shows a software interface for selecting a report. On the left, a list of departments is displayed with checkboxes, all of which are checked. The departments listed are: AXE THROWING, Beer, Can Wine, Draft Beer, Draft Wine, ESCAPE ROOMS, FOOD, GAMES, Liquor, MATINEE AX, MATINEE ESCAPE, MERCHANDISE, N/A BEV, Tip Pool, Wine, and Xola. The 'Xola' item is highlighted with a blue bar. On the right, under the heading 'Department Mix Report', there are two blue buttons: 'Mix By Department' and 'Mix By Category'. Below these is a 'Select Date Range' section with a purple 'Select Range' button and a green 'Today' button. At the bottom, there are two buttons: a grey 'Uncheck All' button and a red 'Exit' button.

2 On the prompted screen, select the departments you wish to view by checking the box next to the associated department (or press Check All).

3 Once the departments are selected, select a date range (or today)

The first date selected is the Starting Date and the following date selected is the Ending Date. If you need to view another month, use the arrows to the right and left of the calendar header. You can also select the Week to Date or Period to Date button

4 Once the Starting and Ending Dates are entered, press **Search**.

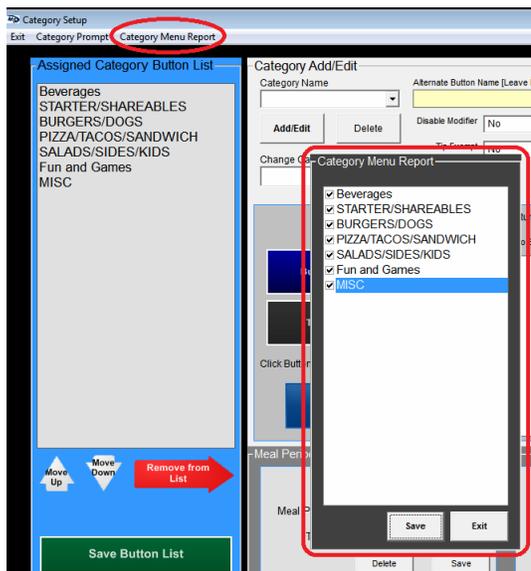
5 The printing is determined by your report configuration

Department Mix

The Departments are displayed in alphabetical order and contains the Menu Items associated with the Department. The Quantity is the amount of items sold during the selected time period. The Sales is the price of the Item multiplied by the Quantity sold during the selected time period. The Cost for each menu item can be entered for each item under **Menu Items and Pricing**, located under **Menu Maintenance**. The Cost divided by Sales equals the sales percentage. The total row on the bottom displays the quantity for all of the Menu Items sold for the selected Departments as well as the total Dollar amount for the selected time period.

Category Mix

The Category Mix Report shows the same information in the same format as the Department Mix Report but is broken down by categories instead of by departments. Before running the report by category, you must first go to the *Managers Menu* → *Menu Maintenance* → *Menu Category* and click on the button at the top that says *Category Menu Report* circled in red down below and select the categories that you would like to track. You can further customize this list by selecting specific categories at the time you run the report.



Mix by Revenue Center Report

📍 Managers Menu > Reports Menu > Menu and Menu Sales > **Mix by Revenue Center**

Sales can be broken down by Revenue Centers. Revenue Centers can be created for different areas within a single establishment. Examples of Revenue Centers are “Dining Room”, “Bar Area”, “Patio”, etc. The Mix by Revenue Center report separates menu items, quantities, and sales dollars by each revenue center.

- 1 Select **Mix by Revenue Center**
- 2 Select a date or date range
- 3 Select a revenue center

Product Mix Daily by Hour Report

Managers Menu > Reports Menu > Menu and Menu Sales > **Product Mix Daily by Hour**

This report provides menu items sold by the hour for a selected day or the current day. The report can be viewed at any time of the day as it updates items as they are sold throughout the current day.

The report automatically prints on the receipt printer. The day selected is marked by a numerical value, e.g. Monday=1, Tuesday=2, Friday=5. This numerical value is determined by the first day of your week.

Note: The default week in MicroSale is Monday-Sunday.

Customizing your week in MicroSale

Managers Menu > Register Setup > Terminal Configuration > Register Options > **Time Keeping (toolbar)**

Use the dropdown and select the appropriate day. Save before exiting if any changes are made

Product Mix Today by Hour Report

Managers Menu > Reports Menu > Menu and Menu Sales > **Product Mix Today by Hour**

This report provides menu items sold by the hour for the current day. The report can be viewed at any time of the day as it updates items as they are sold throughout the current day.

Product Mix Daily WTD by Hour Report

Managers Menu > Reports Menu > Menu and Menu Sales > **Product Mix Daily WTD by Hour**

The report generates sales of menu items by hour for the current week. This report will change daily as the week progresses.

When selecting the Product Mix WTD by Hour button it will proceed to print out the report. On this report you will have a header of a Name, Quantity, and Amount. Listed below the header is where you will see the menu items that were sold for the current week and hour of the day.

Product Mix Report

You can run your product mix for the current day or closed days.

Closed Days (Historical Data):

📍 Managers Menu > Reports Menu > Daily Sales Summary > **Product Mix**

The report will display all the menu items that were sold during a selected date range. The report is broken down by category type to display individual menu items/modifiers. Each menu item displays the quantity sold, dollars, and percentage sold. The report prints on a 40-column receipt printer or available to view as a PDF when connected to a Reports Printer.

The report is useful for determining which menu items are most popular/least popular. Since the report also shows modifiers, it will help determine modifiers that need to be eliminated or offered more.

Beverages			
Item Name	Quantity Sold	Dollars Sold	Percent Sold
Coke	2	3.50	9.41
Gift Certificate	1	20.00	53.76
Mr Pibb	3	5.25	14.11
Sprite	1	1.75	4.70
Sundrop	1	1.75	4.70
Water	1	0.00	
Salads / Chicken Bowl			
Item Name	Quantity Sold	Dollars Sold	Percent Sold
Chicken Bog Bowl	1	4.95	13.31
Potato Salad	1	0.00	

For live data, use the any of the other mix reports, or use the Menu Item(s) by Individual report.

Sales Mix by Meal Period Report

Managers Menu > Reports Menu > Menu and Menu Sales > **Sales Mix by Meal Period**

This report generates sales of menu items by meal period within a selected date or date range. The data is generated from closed sales (historical data).

The report is organized by category; each category has the quantity sold, total amount and the last category will be the sales amount. The sales amount will be the total quantity of the menu item multiplied by the price of the menu item.

Running the report:

- 1 Select a date or date range
- 2 Choose Yes or No on the prompt to “Filter Mix, Items with Prices only?”



- If you select **Yes**, only menu items with prices are listed. Free modifiers, water, etc., is excluded
- If you select **No**, all items (free modifiers) are listed

Print Utilities

Managers Menu > Reports Menu > **Print Utilities**

The Print Utilities area allows you to print a full list of the menu in the POS, modifiers, PLUs if applicable, and more.

Print Store Menu

- If you do not have a report printer attached, this option immediately prints a full list of your menu on the receipt printer.
- The Store Menu on a report printer prints more detail; including the menu item name, the PLU number assigned (if applicable), the price, the modifier group names attached, and remote printers assigned

Print Countdown Items Reports

This report uses the Number Available option (where you can set how many of each item you have in stock). When the report is generated, the quantity on hand prints next to each menu item.

Print Modifiers

This report generates a list of all modifier group names programmed in the system. It also lists important options that are set for each group such as 'required', 'multi-select' (option allowing user to choose as many modifiers as desired until selecting "Done", optional (whether it prompts immediately or only appears when called upon using "Modify Item", and if the font size prints larger than default.

Page 1

MicroSale
1221 W. Brandon Blvd.
Modifier Options

Modifier Name	required	Multi Select	Optional	Expand Print
Double-Triple-Half	No	No	Yes	Yes
Fish How Cooked	Yes	No	Yes	Yes
Break How Cooked	Yes	No	Yes	Yes
Add Chicken 10	No	Yes	Yes	Yes
Add Chicken 16	No	Yes	Yes	Yes
Burger Cook Temps	Yes	No	Yes	Yes
Quesadilla	No	No	Yes	Yes
Sliders	No	No	Yes	Yes
Beer Bucket	No	No	Yes	Yes
Babe Burger	No	Yes	Yes	Yes
Black Bean Burger	No	Yes	Yes	Yes
Caesar Salad	No	Yes	Yes	Yes
Canadian Burger	No	Yes	Yes	Yes

View Modifier List

The modifier list is helpful when you want to quickly see the price of each modifier and if the modifier is linked (modified by) another modifier group.

Liquor PLU Dump

The report shows the menu item name, PLU, and quantity for all menu items programmed into the system that have PLUs assigned.

Order Type Report

This report breaks down sales by order destination. The first column "\$ Sold" shows the dollars sold for dine in, go orders, etc. the next column shows the quantity for each order destination, and the last category shows the dollar amounts for discounts by their order destination. The report also provides totals for each column at the bottom of each column. You can also save your previously ran reports in the "Order Type Report" window shown below.

Once the box is checked next to the dated report, it automatically prints (if the print jobs are routed to the receipt printer). In this configuration, the reports for the "Print Store Menu" and "View Modifier List" can be lengthy, so make sure the printer has enough paper in it before selecting these reports or choose to run the reports on a terminal with a report printer.

Close Outs

Daily and Weekly Close Outs are essential to the efficiency of your operation. A close out reconciles sales, batches credit card sales, and ensures that days' or weeks' sales are accounted properly.

Running the daily closeout

Important: You must run a close out (or have the system automatically close out) and then verify the closeout ran before starting the next business day.

You can also close the system manually and have the system set to automatically close out as a backup. If the close out has already ran, the auto-close out does not run.

Before You Run a Close Out:

- 1 Close out any open orders (Tables, Tabs, Checks, Phone Orders, etc.)
- 2 Apply any remaining tips to credit cards (if applicable)
- 3 Make sure ALL audits (servers/cashiers) are CLOSED
- 4 Make sure all of your terminals (workstations) in the restaurant are powered on and on the ID screen of MicroSale

Running the Closeout and Batching credit card charges

- 1 Log into the **Managers Menu**
- 2 Select **Daily Close**
- 3 Optional: Enter in any remaining cash deposits under the Bank Deposit area. This will adjust your "Over/Short" amount.

DAILY TOTALS	
Cash to Account For	94.57
Cash From Audits	236.79
Bank Deposit 2	0.00
Bank Deposit 3	0.00
Bank Deposit 4	0.00
Closing Deposit	0.00
Ending Safe Amount	0.00
Total Voids	24.95
Total Discounts	0.38
Total Non Cash	0.00
Total Bank Deposits	236.79
Total Paid Outs	10.00
Deposits Paid In	0.00
Over / Short	142.22

Calculator
Erase
Close Daily Sales
Exit

- 4 Select **Close Daily Sales**

Important: This process can take several minutes to complete and when it is finished it will exit you back out to the Managers Menu. Halfway through the close out it will prompt you to close your batch with a Yes/No message. You should always choose "Yes", unless there are still tips that need to be added to credit cards. You can settle the batch manually at a later time from the Credit Card Menu if there are tips that still need to be applied. The batch will display a successful message when completed and it will finish the close out process.

Daily Close Printout (Z Out Report)

The daily closeout is either printed on a receipt printer or report printer, depending on the register that is used for the closeout.

Nightly Sales Report Wednesday 09/26/2012			
Hourly Sales			
Time	Net	Total	Trans
12:00 PM	362.01	362.01	5
5:00 PM	18.00	380.01	
6:00 PM	86.26	468.27	1
7:00 PM	516.63	984.90	5
8:00 PM	307.42	1292.32	12
9:00 PM	157.31	1459.63	7
10:00 PM	182.76	1642.39	7
11:00 PM	108.83	1751.22	12
12:00 AM	80.12	1831.34	5
1:00 AM	23.13	1854.47	16
2:00 AM	41.30	1895.77	7
3:00 AM	55.63	1952.40	4
Meal Period Sales			
Meal	Net	Trans	Cust.
Lunch	362.01	5	7
Cust Avg	51.72	Chk Avg	72.40
Thru	16.00		
Dinner	1079.62	25	44
Cust Avg	24.54	Chk Avg	43.18
Late	502.77	51	54
Cust Avg	9.31	Chk Avg	9.86
Total	1962.40	81	105
Cust Avg	18.69	Chk Avg	24.23

Daily 11/19/12 Cat/Dept			
Name	\$	Qty	¢
Appetizers	136.70	32	6.67
Beverages	166.30	63	8.11
Bottle Beer	128.56	38	6.27
Bourbon Whiskey	300.85	58	14.68
Burgers Sandwiches			
	91.75	10	4.48
Coffee Drinks	6.50	1	0.32
Discount	-67.58	12	0.00
Frequent Diner	-20.00	2	0.00
House Wines	52.01	11	2.54
Irish Fare Favorites			
	321.00	27	15.66
Misc	0.01	1	0.00
Mixed Drinks K--9			
	9.82	2	0.48
Offales Specials	431.82	112	21.06
Pints	268.55	68	13.10
Rum	5.25	1	0.30
Scotch	8.42	2	0.41
Shots	53.74	10	2.62
Vodka	67.70	12	3.30
Net Total	1962.40	462	100.00

Dept. Void Report			
Name	\$	Qty	¢
Beer	816.00	3	
Food	824.40	6	
Liquor	87.00	2	
Soft Drinks	810.00	5	
Total	857.40	16	

Daily Sales	
12:37 PM	Date 11/19/2012
Gross Sales	: 2107.38
Non Sales Revenue	: .00
Net Discounts	: 87.58
Voided Sales	: 57.40
Net Sales	1962.40
Net Sales Tax	: 139.06
Dine In	: 2049.58
Count	: 82
Customer Count	: 104
Transactions	: 82
No Sale	: 23
Week to Date Sales	
Gross Sales	: 4718.45
Non Sales Revenue	: 115.00
Net Sales Tax	: 304.17
Net Discounts	: 410.59
Voided Sales	: 87.60
WTD Net Sales	: 4105.26

Bank Deposits	
Bank Deposit	: 245.40
Total Bank Deposits	: 245.40

Tender Types	
Cash Collected	: 735.53
Gift Certificate	: 100.00
Amex	: 122.37
Visa	: 945.26
MasterCard	: 528.43
Total Credit Cards	: 1596.06
Total Non Cash Tenders	: 1696.06
Credit Card Returns	: .00
Returns Included In Total	

PAID OUTS	
General	: 34.00
Music	: 63.00
Produce	: 5.00
Repairs	: 58.00
Total Paid Outs	: 160.00

Discount	
179 Hero Discount	: 32.35 10
Manager Comp	: 35.15 2
Total Discount	: 67.50
Total Frequent Diner	: 20.00
Total	: 87.58

Frequent Diner	
VIP \$10 Discount	: 20.00 2
Total Frequent Diner	: 20.00

Closed Check Voids	
Chk # 1006	4.00 .00
Chk # 3023	4.00 .00
Chk # 4001	9.90 .00
Chk # 3040	28.50 .00
Chk # 3016	11.00 .00
Total Void Sales	: 57.40

Cash To Account For	
Cash To Account For	: 245.40
Adjusted Gross Total	: 2101.46
Total Accounted For	: 2101.46
Perfect	: .00
Adjusted Net Sales	: 1962.40
Close Counter	: 268

Calculations:

Non Sales Revenue = Gift Cards Sold, Service Charges, Gratuity, Deposits
Net Discounts = Total Disc.
Voided Sales = Total Voids

All Sales
+ Discounts
+ Voids
+ Refunds
+ Non Sales Revenue
= Gross Sales

Gross Sales
- Voids
- Discounts
- Refunds
- Non Sales Revenue
= Net Sales

Net Sales
+ Net Tax
- Non Cash Tenders
- Paid Outs
Cash to Account For

1962.40 Net Sales
+ 139.06 Net Tax
-1696.06 Non Cash Tenders
- 160.00 Paid Outs
\$ 245.40 = Cash to Account For

Net Sales
+Non Sale Revenue
+ Net Sales Tax
Adjusted Gross Total

1962.40 Net Sales
+Non Sale Revenue
+ 139.06 Net Tax
\$ 2101.46 Adjusted Gross Total

Bank Deposits
+ Total Paid Outs
+ Non Cash Tenders
Total Accounted For

245.40 Bank Deposit
+ 160.00 Paid Outs
+ 1696.06 Non Cash Tenders
2101.46 = Total Accounted For

1962.40 All Sales
+ 87.58 Discounts
+ 57.40 Voids
+ 0.00 Refunds
+ 0.00 Non Sales Rev
\$2107.38 = Gross Sales

2107.38 Gross Sales
- 87.58 Discounts
- 57.40 Voids
- 0.00 Refunds
- 0.00 Non Sales Rev
\$1962.40 Net Sales

Reprinting the close out

Depending on your settings, the daily close out information is automatically emailed. If you need to reprint the closeout information, you can go to Managers Menu > Reports Menu > Daily Sales Summary > **Reprint Day** (bottom of screen).

Close Out Optional Settings

Setting the system to auto close



WARNING

Set the auto close on ONE terminal only!!!

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Terminal Setup > **Auto Close System** > use the dropdown to replace “None” with an auto close time

Choose a time that is at least 1-2 hours after your business closes to ensure you are ready to have the system close the day and batch the credit card charges.

Allowing the close out to run with employees clocked in



WARNING

With this option, employees must have their audits closed and tips entered before the close out runs. **Tips cannot be entered after the batch settles!!!**

Setting the option to allow the close out to run with employees clocked in:

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Printing / Cash Drawer > **Time Clock / Misc** > tick the option **End of day runs with employee(s) on the clock** > Save > Exit

Weekly Close Out

This will reset the week to date totals as well as perform maintenance on the system.

The End of Week (EOW) needs to be performed after the Daily Close on the last day of your restaurant's week. Please verify when your week ends before performing this task. Before the start of the new week, check to ensure the EOW was performed the night before.

If it has been longer than 7 days since the last successful weekly closeout, a message will prompt that will alert you that the closeout has not ran in X amount of days. **As long as your daily close has been completed, the weekly close out will occur automatically**

The weekly close out is driven by the 'first day of the week'. It runs automatically on the last day of the week. (If your week starts on Monday and the system is set to a 7-day week, the weekly close out will run on Sunday after the daily close is completed).

Verify the weekly close out was completed:

- 📍 Managers Menu > Reports Menu > **Sales Reports**
The sales figures should all **be zero (including the WTD, week-to-date, sales numbers)**

To manually run a weekly closeout:

****The end of day close must be completed before you close the week****

- 1 Log into the **Managers Menu**
- 2 Select **Reports Menu**
- 3 Select **Weekly Close Out**

The system will display a Week to Date Mix report. You can always reprint this report at a later time for any desired date range

More Information on week settings

The default week in MicroSale is Monday-Sunday. The weekly close out is driven by the 'first day of the week'. It runs automatically on the last day of the week. (If your week starts on Monday and the system is set to a 7-day week, the weekly close out will run on Sunday after the daily close is completed).

Customizing your week in MicroSale

- 📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > **Time Keeping (toolbar)**
If your week starts a different day, use the dropdown and select the appropriate day. Save before exiting if any changes are made

If the restaurant is closed the last day of the week, for example, you are closed on Sunday and your week starts on Monday, set the number of days in a week to 6. The weekly closeout would then initiate on Saturday night. If your restaurant is closed in the middle of the week, for example, Wednesday, the first day of your week must be set to Thursday. The weekly closeout initiates on the last day of the 'number of days in the week'.

Closing Time Records

Closing the time records finalizes the employee time records; once the records are closed, they cannot be edited. Use Preview or Print Time Records prior to closing, to ensure the information is correct. You need to close the time records weekly or biweekly, depending on your business.

To Close Time Records:

📍 Managers Menu > Reports Menu > Time Keeping Reports > **Close Current Time Records**

- 1 Select **Close Current Time Records**
- 2 Alternatively to selecting dates on the calendar, dates listed in the drop-down are records that are currently open. Choose the dropdown and select the starting and ending date.
- 3 The report prints to either a receipt printer or a report printer depending on your configuration of the system. You can see an example of both below:

MicroSale						
Period 8/19/2012 To 8/19/2012						
11:02:28 AM Date 8/28/2012						
Name : Aiden Colorado						
SSN : 1001						
Work Date	Time In	Brk Out	Brk In	Time Out	Total Hours	
08/19	12:00			18:00	6.00	
Dept Name	Reg Hr		OT Hr			
Manager	6.00		.00			
Total Hours	6.00		.00			
Sign : _____						
I here by acknowledge that this is a true and complete record of my time.						
Summary						
Sales 0.00			Gross Pay 0.00			
Total Tips 0.00			Tip %			

MicroSale										
Report Printed 08/27/2012 Printed By William Train										
Name	Aiden Colorado			SSN	1001					
Work Date	Time	Break Out	Break In	Out	Reg	Day OT	Total Hours	Tip Sales	T-Tips	Job
08/19	12:00			18:00	6.00	0.00	6.00	0.00	0.00	Manager
Department Name	Regular Hours			Over Time						
Manager	6.00			0.00						
Total Hours	6.00			0.00						
Sign : _____ I here by acknowledge that this is a true and complete record of my time.										
Summary	Gross Pay 0.00			Tip Sales 0.00		% Sales				

Formulas Used:

Gross Pay = Rate of Pay * Total Hours
 Total Tips = Cash Tips + Non Cash Tips
 Sales = Net Sales

The bottom of the report lists totals for Regular Hours and Over Time Hours per job title and a total for all job titles.

Summary		
Sales 0.00	Gross Pay 0.00	
Total Tips 0.00	Tip %	
Totals	Reg Hr	OT Hr
Manager	12.75	.00
Cashier	18.25	.00
Cook	30.25	.00
Total Hours	61.25	.00

Credit Card Menu

📍 Managers Menu > **Credit Card Menu**

The credit card menu is a view of all transactions tendered with a credit card. From the credit card menu, you can view each check that was tendered using a credit card as well as any tip or gratuity added. If you select the “Batch Charges” button you will close the current batch. When you do this, MicroSale sends the credit card information that was stored for that day to the merchant provider for settling. The Daily Closeout will prompt you at the end to settle the batch, so you normally would not initiate this manually.

Viewing the Credit Card Menu

Term	Description
Auth. No	Comes from the processor
Status	Deposit, EMV Sale, Void, or Offline
Check No	The assigned number for a check
Servers	Name of the employee who tendered the order
Charge Amt	The total price of the check including tax
Gratuity	Any tip or gratuity that was added to the card. Touch this field if you need to edit the tip prior to sending the batch.
Account Number	The card number on the swiped card showing only the last 4 digits
Check Total	Overall total of all checks tendered using a credit card
Tip Total	Overall total of all tips applied to credit cards
Batch Total	Check Total + Tip Total

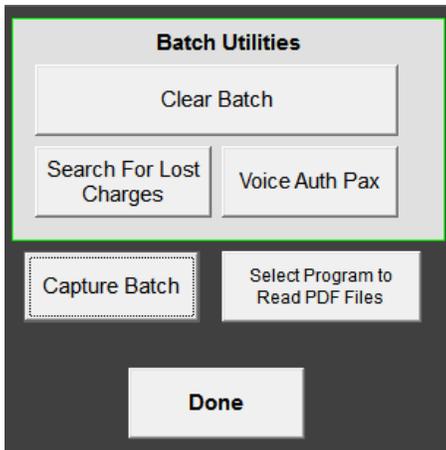
Manually sending the batch

Typically the batch settles at the end of the closeout process. It is important to run the closeout prior to batching charges.

The only reason to manually batch charges is if the closeout errored or if the batch did not settle after the closeout.

- 1 Select **Batch Charges**
- 2 Select **Yes** to batch
- 3 When the batch settles, the list of current charges clears off the screen and sends off to the processor

Batch Utilities Menu



Term	Description
Clear Batch	Erases the batch completely ***NOTE*** You will <u>lose</u> every charge that exists in MicroSale and it will <u>not</u> be recoverable!!!
Search For Lost Charges	Looks through the network at each terminal in the system for any charges that aren't accounted for on the terminal you are currently on and will add them to the approvals database. This is used to recover lost charges due to network issues
Voice Auth Pax	You would use this button if you get an authorization for a charge without going through the POS but you still want the credit card charge to be accounted for.
Capture Batch	Allows you to capture charges that are marked as preauths in order to settle the charges during the batch settlement
Select Program to Read PDF Files	Batch reports are stored in the form of a PDF file. You must install a program, such as Adobe Reader, and then browse to the path for the Adobe Reader executable file in order to store and view batch reports from previous days. Once the path to the program is set you will see the path the program at the bottom of the credit card menu
Done	Exits out of the submenu

Customer Management

MicroSale includes customer relationship management tools that give you details of customers for call in orders, loyalty programs, memberships and house accounts.

Term	Description
Customer Information	A customer may be set up using the standard Phone Order functions. Basic customer information includes name, address, email, and phone number. Saved customers are searchable by keywords or phone number
Frequent Diner	Useful to create loyalty programs; set up instant rewards plans or accumulating points plans
House Accounts	House Accounts can run up a tab for regular customers that is prepaid or paid monthly (and email statements when payment is due), keeps track of purchases, keeps credit cards on file while maintaining PCI compliancy, tracks special days (birthdays, anniversaries), and is considered a payment method
Memberships	May be set up for country clubs or exclusive establishments where customers must be a member in order to purchase products

Customer Information & Customer Reports

 Managers Menu > Reports Menu > **Customer Tracking**

The customer information is based on phone orders. The amount of details shown is determined by the information inputted at the time of order. By default, only the phone number is required for order entry. However, for the Customer Information and Reports to be most beneficial, you should enter as much information as possible. It is recommended to include the first name and/or email address.

Customer List

The Customer List Button is a date range report (viewed as a PDF). The range selected generates the customers from the selected time frame. Choose a specific amount of days (press the same date twice to view one day's customers), weeks, or months. If you press "done" without selecting a date, all customers are generated. This could take 3-6 minutes to search and if you search too far back, the information could become outdated (customer could change phone number, email address, etc.)

The report can be emailed or printed for marketing/management use. The header will show your restaurant's information, the date the report was ran (the current day) and the manager who ran the report.

Add Customer

Adding a customer allows management/authorized staff to input a new customer that is not automatically saved through phone orders. This allows you to build a customer base on more than just phone order customers. This function also serves as a way to attach coupons for specific customers. Once the customer information is added (requires phone number), you can attach the coupon.

In the screen, you may also add instructions for the customer for the next time they visit, the last time they visited, and their last order.

Customer Information

Name Phone

Address

City State Zip

Email

Instructions

Last Seen On

Coupon Attached

Edit Customers

The Edit Customers screen is identical to the “Add Customer” screen, however it will first display a list of saved customers. When you touch/click on a name, you will see the saved information for that specific person. This screen will show you the last time the customer ordered (remember, this is driven by the phone number!) and if it is within 90 days, you can touch/click on the Show Last Order to see the customer’s last order placed. (the order will print on the receipt printer)

Customer Information

Name Phone

Address

City State Zip

Email

Instructions

Last Seen On

Coupon Attached

Last order for AARON

Current Time 04:19 PM

AARON 123.498.9544

Last Order Date 05/26/2012

1.00	Garden Salad
	Thousand Island
1.00	S/O Hot Sauce
1.00	SM Fries
1.00	Coke

Show All Customers

Show All Customers will display a list of all customers saved in the system. This screen is an easier way to search and view your customers—Figure 6. You can touch/click in a customer's row to view the same screen as “Add Customer” and “Edit Customer”. Print List will print a PDF version which is the same as “Customer List”

Name	Phone	Address	City	State	Zip	Instructions
Bruce Banner	555.7965		Brandon	FL	33511	
J	555.1336		Brandon	FL	33511	
James Howlett	555.1212		Brandon	FL	33511	
John Doe	555.1234		Brandon	FL	33511	
MICROSALE	813.681.1875	1211 W. BRANDON	Brandon	FL	33511	
Natasha Romanova	555.7878		Brandon	FL	33511	
Peter Parker	555.6969		Brandon	FL	33511	
Phone Order	555.5555		Brandon	FL	33511	
Remy LeBeau	555.1111		Brandon	FL	33511	
Steve Rogers	555.5678		Brandon	FL	33511	

Phone Search Address Search Name Search Print List Exit

Pending Orders

Pending Orders prints the pending orders for tomorrow's pick up. When the button is pressed, it will print the report to the receipt printer (or appear as a PDF on screen, depending on your settings). This report is a quick way to view the inventory that will be used for the orders, and to see how many orders are scheduled for pick up. *Please note that this report is not designed to be used for the kitchen.*

Pending Orders for 08/28/2012	
Current Time 02:32 PM	
Phone Order	813.651.1875
Date Needed 08/29/2012	
1.00	12 Wings Mild

Pending Order Summary

The Pending Order Summary is a date range report. The range selected generates the pending orders for the selected time frame. This report is a quick way to view the inventory that will be used for the orders. The report breaks down items by category. The categories displaying a prefix of "M" represent modifiers.

Page 1

Traceys Tacos
1221 W. Brandegee Blvd.
Phone Order Item Summary

Report Date 05/03/2020 05:01 PM Printed By NewEmployee

From 5/3/2020 To 5/3/2020

CATEGORY	QTY	MENU ITEMS
APPETIZERS ****	7	2pc Potato Skins
	1	BBC
	1	Ranch
	1	Wings 5pc
BROILER STEAKS CHOPS ****	1	French Fries
	1	Italian
	1	Salad
	1	Skirt Steak
	1	Well
DESSERT ****	1	Cornst Cake
	1	Triple Chocolate Cak
FAVORITES ****	2	Creole Jambalaya
	1	Italian
	1	Salad
	1	Soup 1
KIDS ****	1	Jr Hamburger
SALADS - SOUPS ****	1	House Salad
	1	Ranch
SANDWICHES ****		

Virtual Report

Email Groups

- Test
- Accounting

Email

Zoom Out

Zoom In

Page Up

Page Down

Print

Exit

Frequency Report

The Frequency Report is a date range report (viewed as a PDF). The first pop up will display a calendar, to choose a range of dates. The range selected will show the customers with number of visits for the selected time frame.

Frequent Diner

Frequent Diner rewards customers with discounts who frequently dine at your restaurant. The discounts can either be based on a number of dollars spent, or based on a number of points earned by purchasing certain products. The customers can use a magnetic card at the time of purchase, or you can assign them a unique account number. Each qualifying sale will then be tracked toward the completion of a plan.

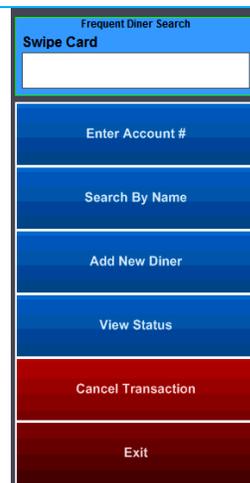
This built in feature allows you to not only encourage customer frequency but to also build a customer database for marketing campaigns.

Using Frequent Diner

Adding Customers

1 Select **Frequent Diner** on the order screen

2 Select **Add New Diner**

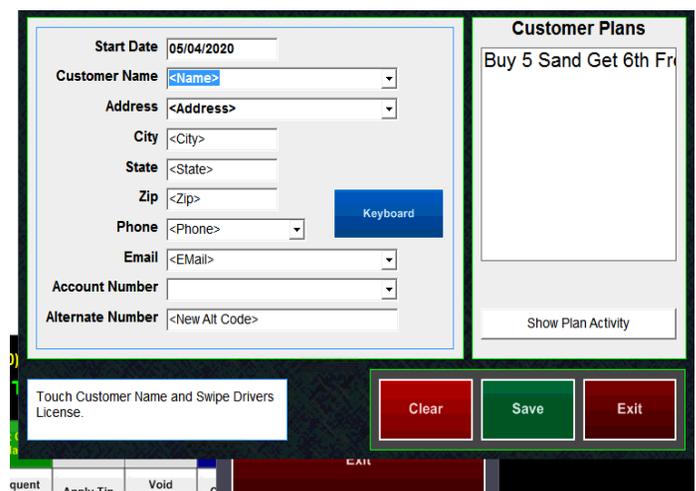


1 **Only the Account Number is required**

- You can touch each field to add in information, or you can touch <Name> and swipe (or scan) a driver's license to automatically populate customer information.
- If you are using swipe cards for your Frequent Diner program, touch in the Account Number field and swipe the card (data will populate).

2 **Save when completed**

- You are also able to reference an account by Name if you do not choose to assign a customer to a number or card.
- The right displays the plans in the system. *You do not have to click on anything in this box.*

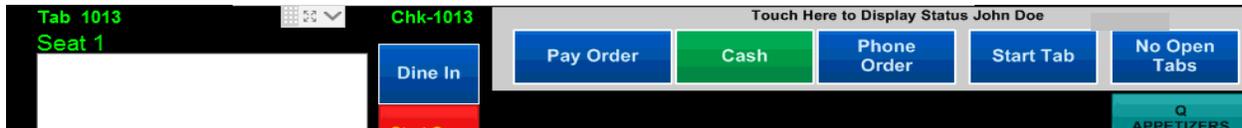


Using Frequent Diner for existing Customers

1 Anytime during an order you can press Frequent Diner and swipe the card (or enter number/name) to register the customer's order into their frequent diner account

! *****NOTE: AFTER YOU TENDER THE ORDER, YOU CAN NOT PUT THE POINTS ONTO THE CUSTOMERS ACCOUNT. THE FREQUENT DINER MUST BE ENTERED DURING ORDER ENTRY***** if necessary, a manager can manually add the points through the back office.

2 After you swipe the card, you should see flashing text at the top of the order screen. This shows that the card/number/name registered and that you are on their account.



3 After you ring in the order, you can simply tender out the order regularly. However, if the customer is interested to see where they are at on their points/dollars status, touch the flashing text

! **You may have many plans in your program. Only the plans that have points accumulated will show:**

The screenshot shows a screen titled "Touch Plan for Discount" with the name "John Doe" at the top. Below the name is a table with the following data:

Plan	Dollars	Points	Need
Buy 5 Sand Get 6th Fre		6.00	4
Total Credit	25.00	2	

At the bottom of the screen, there are two buttons: "Print Account Status" and "Exit".

Tracking and Maintaining Customers

📍 Managers Menu > **Frequent Diner**

Customer Maintenance is a similar screen previously discussed in Adding Customers. ☐ *Plan Maintenance* allows you to add and delete plans (discussed later). *Customer Status and Customer List* is a report of all of your customers.

Above: The Status Report lists out all of the customers in your Frequent Diner Database. Here you can see the customer's plans along with the check number in which the points were received, the total spent and total points.

Above: The Frequent Customer list is a great tool to use for marketing. If your cashiers take the time to fill out all of the customer's information, you can do direct marketing. This database will help you track the locations of your customers.

Setting up Frequent Diner

- 1** Create a customer discount in **Discount Maintenance**:
- 2** Example: *Buy 5 Sandwiches, get 6th Free*
- 3** Name the Discount: *Sixth Sandwich Free*
- 4** Select the type of discount: *Discount Percentage*
- 5** What amount or percentage of the item gets discounted? *100.0*
- 6** What is the minimum access level needed to apply the discount to a check without Manager approval?
Server Select the category for the discount: *Frequent Diner*
- 7** In the *Sales Tax Adjust* box, touch the drop-down beside *Sales Tax* and select **0** if the customers in your area are responsible by law for paying sales tax on the total before the discount is applied. If there is a **1** in the *Sales Tax* field, it means that the dollar amount after the discount will be taxed.
- 8** Set the discount to Match With: *Category*
- 9** From the Available Items, Assign: *Sandwiches*
- 10** Type a *Maximum Amount Allowed per Transaction*, if desired. Touch **Save** after completed.

Plan Maintenance

📍 Managers Menu > Frequent Diner > **Plan Maintenance**

🚨 **Important:** Multiple Plans CANNOT track the same menu items or link to the same discounts

Banked Plan “Point Plan”

This plan can be taken whenever the customer would like. Can rack up or “bank” points to get something better for free. Once reward is redeemed, it takes the customer back to 0. Whatever is ordered additionally on this transaction, it will not count towards the new plan, because the reward must be tendered first.

Example: *Buy 5 Sandwiches, get 6th Free*

- 1 Name the Plan: *Buy 5 Sand, Get 6th Free*
- 2 Select the Discount for this plan: *Sixth Sandwich Free*
- 3 Choose the type of Plan: *Points*
- 4 Set the number of points needed to receive the discount: 6
- 5 Choose how to assign the points – only to specific menu items, to all menu items in a certain category, or to all menu items that use a certain department: *Categories*
- 6 Assign the point values earned: Highlight a category in the list, and click the first empty box under “Selected Items”. In the box next to it, type the number of points earned for menu items in that category: *Sandwiches 1*
- 7 Continue assigning all categories that apply
- 8 Touch **Save** when completed

Reward Plan “Dollar Plan”

🚨 **Important:** MUST BE TAKEN AT TIME OF QUALIFICATION. You cannot choose when to take this reward. Once reward is redeemed, it takes the customer back to 0. Whatever is ordered additionally on this transaction, will not count towards the new plan, because the reward must be tendered first.

Timed Events can be used with a Dollar Plan in order to increase or decrease the dollar amounts.

This plan takes the AVERAGE price of all the customer’s orders.

Example: Sally orders a .99 coffee 5 times, and will only get a .99 coffee for free on the 6th visit.

Sally orders a \$4.99 Mocha Latte 5 times, and will get a \$4.99 coffee for free on the 6th visit.

Set up the discount associated with the Frequent Diner plan. In this example, a customer can get one free pasta after he spends \$50.00. The discount is set up as follows:

- 1 Create the plan associated with the discount in **Frequent Diner Plan Maintenance**:
Example: *Spend \$50.00, Get one Pasta Free*

- 2 Name the Plan: *Spend \$50, Get 1 Pasta*
- 3 Select the Discount for this plan: *Free Pasta with \$50*
- 4 Choose the type of Plan: *Dollars*
- 5 Set the number of dollars the customer must spend to receive the discount: *50* Choose which purchases qualify for the plan – only specific menu items, all menu items in a certain category, or all menu items that use a certain department: *Categories*
- 6 Assign the specific Categories that qualify. Highlight a category in the list, and click the first empty box under “Selected Items”.
- 7 Continue assigning all categories that apply. In this example, they can purchase any items and when the total reaches \$50.00, one Pasta is free.
- 8 Click **Save** when completed

House Accounts

House accounts allow users to create payment accounts for individual customers. Customers can use the account to accrue a balance that can be paid at a later time or prepay the account. You can create invoices to send to customers based on orders placed in a selected date range.

📍 Managers Menu > **Gift Certificate House Account**

House Account Setup

Creating a tender type

📍 Managers Menu > Register Setup > Terminal Configuration > **Tenders – Job Codes – Paid Out – etc (button)**

- 1 Select **Tender Setup**
- 2 Enter in a Tender Name such as “House Accounts”
- 3 Select the **House Account** check box and **Save**

Linking a tender type to a new account type

📍 Managers Menu > **Gift Certificate/House Account**

- 1 Select **Link Tender To Accounts**
- 2 Type in a new name for the “Account Type Setup” field. You can create multiple groups such as “Bar Regulars”
- 3 Select the tender type you created earlier from the drop-down list
- 4 Select either Yes or No for Tip Accepted
- 5 Leave the Billing Amount at zero
- 6 Select ‘House Account’ as the Default Account Type
- 7 Save
- 8 Repeat the above steps for each account type

Creating House Accounts

There are two ways to set up a house account:

Managers Menu:

📍 Managers Menu > **Gift Certificate House Account**

- 1 There are three main fields to fill in: Name, Account #, Turn On/Off Pre-Paid Balance Only
- 2 Select **Save**
- 3 The system will prompt you to select the type of account, select "House Account"

Order Screen:

- 1 Go to the Order Screen
- 2 Select **Verify Account**
- 3 A screen will load, select **Create Account**
- 4 There are three main fields to fill in: Name, Account #, Turn On/Off Pre-Paid Balance Only
- 5 Select **Save**

Closing an order to a House Account

When you tender an order to a house account, it is counted as a regular sale; more specifically, a non-cash tender. This will show on your balance sheet each day as being paid.

- 1 Ring up the transaction as normal
- 2 On the payment screen, select **House Account**
- 3 It will prompt you to swipe the House Account card or enter the Account # manually
- 4 Touch **Accept Amount**

Funding a House Account

When you apply a payment to the balance due on a house account, that is considered non-sales revenue and will not count as a sale on the balance sheet on the day it was applied since it is not taken as an actual payment that day; you're only paying back what you've already spent.

- 1 Go to the Order Screen
- 2 Select **Apply Payment**
- 3 A window will pop up asking you to enter the amount of the payment.
- 4 Enter dollar amount they are paying including decimal point, and touch "Done".
- 5 Select the "Tender" button and it will take you to the payment screen.
- 6 Select Tender type that they wish to pay with: "Cash" or "Credit Card" (**NOT "House Account"!!**).
- 7 The "Account Payment" screen will appear.
- 8 Swipe card or enter account # manually
- 9 Enter dollar amount paid
- 10 Select **Process**

Printing House Accounts

📍 Managers Menu > **Gift Certificate House Account**

- 1 Select **Reports/Utilities** on bottom right of the screen
- 2 On top right of the screen, select **House Account**
- 3 Select **Print Account Statements**
- 4 This section gives you other information and options. The buttons in the red area allow you to reset account activity such as purge expired accounts and remove inactive credit cards

Emailing Invoices

📍 Managers Menu > **Gift Certificate House Account**

- 1 Select **Reports/Utilities** on bottom right of the screen
- 2 On top right of the screen, select **House Account**
- 3 Select **Email Statements** button at bottom of the screen (Note: An email address must be assigned to each House Account you are emailing the statement to)
- 4 When prompted, "Email All Statements - Send?", Select **Yes**

Memberships

You can set up a restrictive house account type known as *Membership*. Memberships are used mainly in private clubs to prevent employees from ringing up any items, starting any tables, etc. without putting in the member's name or account number first.

Membership Terminal Settings

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > **Terminal Setup**

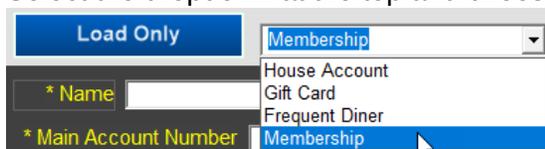
- 1 Under Membership Settings, enable **Member Account Required**
 - a. With this enabled, the POS system is closed for non-members. Only active members can purchase items through the POS system. This option also enables a search; an employee can search to find the customer's membership information by name
- 2 Enable **Account Verification**. This options provides access to verify a membership from the ID screen or create a new account
- 3 Optionally, you can enable **Member Account by Number**
 - a. Member Account by Number disables the "search by name" and the employee must enter the member's number or swipe their membership card. This is the most secure out of the two methods.

Membership Setup

After the *Membership Terminal Settings* are completed, you can make the membership accounts.

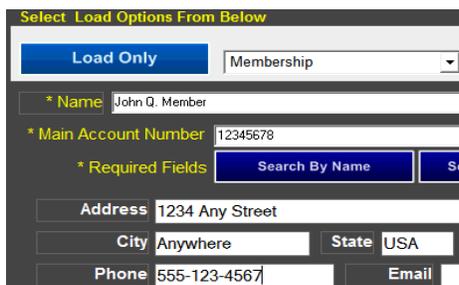
📍 Managers Menu > **Gift Certificate House Account**

- 1 Select the dropdown at the top and choose **Membership**



The screenshot shows a form with a blue 'Load Only' button and a dropdown menu. The dropdown menu is open, showing options: 'House Account', 'Gift Card', 'Frequent Diner', and 'Membership'. The 'Membership' option is highlighted in blue. Below the dropdown are fields for '* Name' and '* Main Account Number'.

- 2 The system can automatically generate an account number or you can choose your own. The number must be at least 5 digits long.



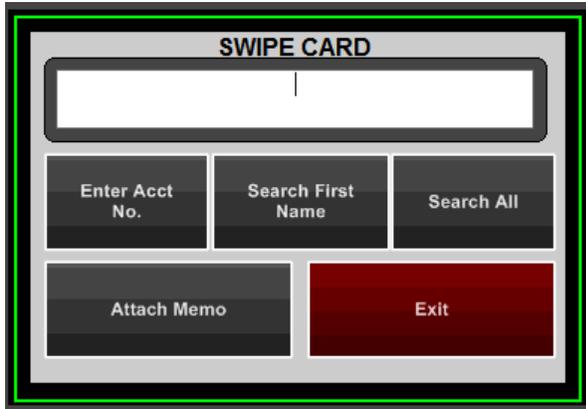
The screenshot shows the full form with the following fields: 'Load Only' button, 'Membership' dropdown, '* Name' (John Q. Member), '* Main Account Number' (12345678), '* Required Fields' (Search By Name, Search), Address (1234 Any Street), City (Anywhere), State (USA), Phone (555-123-4567), and Email.

The system uses this information for various tasks. There is also a checkbox for *Pre-Paid Balance Only*. This will not be used for membership accounts.

- 3 Select **Save Account Information** when completed

Using Memberships

- 1 When a customer comes into the restaurant/club, the server would either get their membership card or their name/number. Then, after the customer orders, the server would open up a table as usual. However, before the order screen can be accessed, the server will get this prompt:



- 2 Unless the option *Member Account By Number* has been turned on in the Register Options, any of these buttons can be pressed or the customer's card (if they have one) could be swiped through the card reader. If *Search All* is selected, you would get a keyboard which would allow typing in a few letters of the person's name to narrow down the search. On this screen you could just hit "Done" and the system would just show a list of all customers in the system.
- 3 Select the appropriate member



- 4 After the check is entered and the customer is ready to leave, go to the payment screen and select "House Account" or another form of payment.
 - a. You can see the *Change Member* button at the top left of the screen. If this button is pressed, it brings up the member account prompt and allows the server to put in an alternate account to be charged. If not, the *Accept Amount* window shows that the primary member for this account is being charged.



Cloud-based Reporting (Optional)



This reports guide covers reports within the local POS system. If you would like to view reports via a web-browser, ReportingAnywhere is a cloud-based reporting subscription available with Versions 9 and Version 10.

The ReportingAnywhere package includes a website for detailed reports and a simplified real-time app available on the App Store and Google Play. ReportingAnywhere is the most efficient way for restaurant operators and managers to access their business's key information in real-time in order to make actionable decisions.

How it works

ReportingAnywhere is compatible with version 9 and 10 of MicroSale. A MicroSale representative installs a connection utility on one of your POS terminals that pushes data up to the servers. The data is then accessible from the ReportingAnywhere responsive desktop website and through an app available on GooglePlay and the Apple Store.

Supports Single or Multi-Locations

ReportingAnywhere is expandable. As your concept grows, you will be able to add your new locations to ReportingAnywhere to easily and conveniently manage your enterprise. As a restaurant owner, you can assign specific locations to managing partners.

ReportingAnywhere is available as an annual subscription. Please contact your MicroSale representative to sign up.

MicroSale POS Systems

For additional help, please contact us.

www.microsale.net

support@microsale.net

info@microsale.net