Store User Guide

2 — Last update: 2017/08/04

NCR

Table of Contents

Welcome

Thank you for choosing NCR Console for your business!

The following User Guide is designed to guide you in the navigation and use of the system features. Please note that based on your brand's chosen solution, you may notice additional features that may not be visible on your platform as you move through the various sections.

New to NCR Console? Check out the **Getting Started** topic. This will take you through the process of logging into our system.

Can't find a topic? Contact us via email at support@ncrconsole.com so we can help!

Thank you again for partnering with us, and please don't hesitate to contact us should you have questions or need any additional assistance.

Sincerely,
NCR Console Team

Getting Started

In this module, you will learn about:

- Usage of the correct URL to access your account
- How to log into your account
- How to reset your password

Which URL is Right for You?

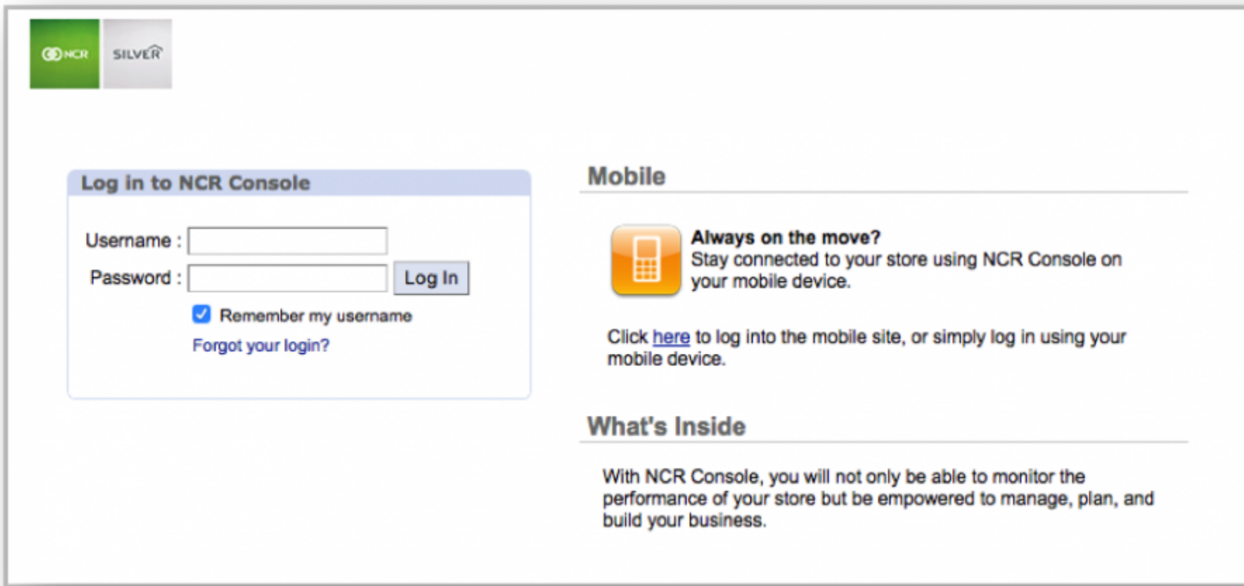
Corporate Users: If you are a corporate user, please contact your brand's representative to obtain login information.
Store Operators and/or Owners: This site is intended for franchisees or store owners and/or operators. It will give an owner/operator complete access to their location's information such as Sales, Inventory, Labor, Corporate Shared Resources, Communications, Customer Service Feedback, Training Materials, Surveys and more; per the package they have signed up for.
Store Employees: This site is intended for employees of specific locations only. Employees with access to this site will be able to access their work schedule, request time off, request shift coverage, send messages to management, and access training materials assigned to them by management.

URL

Use the following URLs as they apply to you:
• *Corporate Users*: Obtain from your brand representative
• *Store Operators and/or Owners*: https://store.ncrconsole.com
• *Store Employees*: https://employee.ncrconsole.com

Log Into Your Account

Enter the applicable URL into your browser to be taken to the login screen.

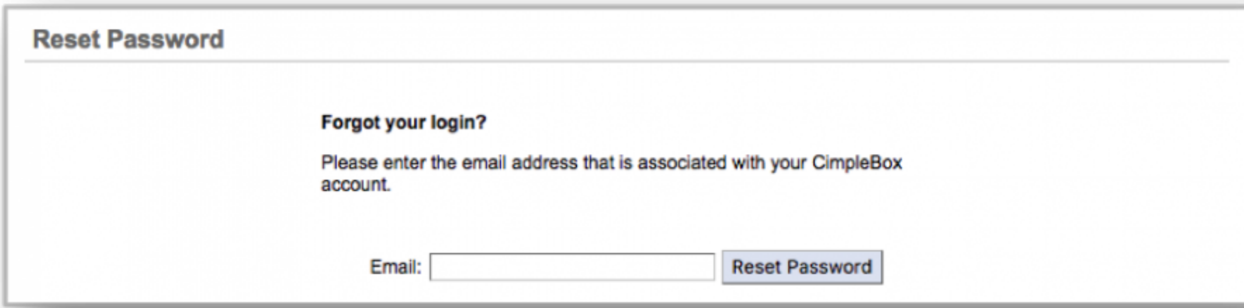


To Log In

1. Enter your username
2. Enter your password
3. To have the site automatically recognize you without having to enter your username in the future, check the **Remember my username** box. Choosing this option will allow you to log in without entering your username each time.
   a. The **Remember my username** option will remain active until you so choose to deactivate it. To ensure the highest level of security and optimize the integrity and privacy of data in your account, we recommend that this option always remain *unchecked*.

Resetting Your Password

In the event you have forgotten your password, you can reset it at any time via the login portal.



To Reset Your Password

1. Click the "***Forgot your login?*** link located directly below the login form.
2. You will be automatically redirected to a new page.
3. As directed, enter the email address associated with your account, and click the **Reset Password** button.
    a. Instructions on how to set your new password will be sent to your email address.

Dashboard Overview

In this module, you will learn about:

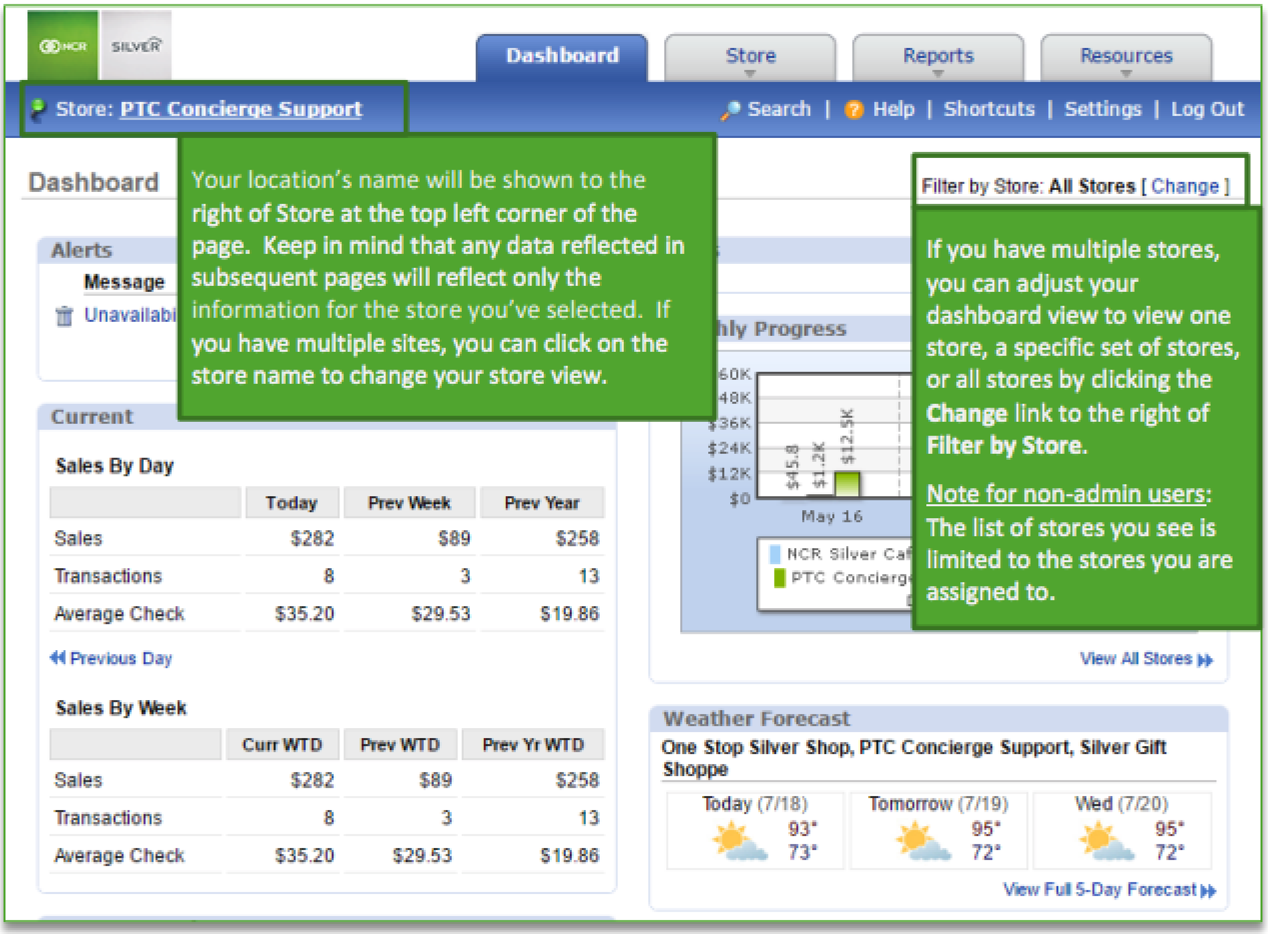
- The standard Dashboard view
- How to navigate away from your Dashboard
- Basic platform features
- Additional Dashboard features

Welcome to Your Dashboard!

Your dashboard view will vary based on:

- Your selected Console package
- The type of login you have (e.g. Corporate, Store, or Employee user)

- The user permissions that have been assigned to you

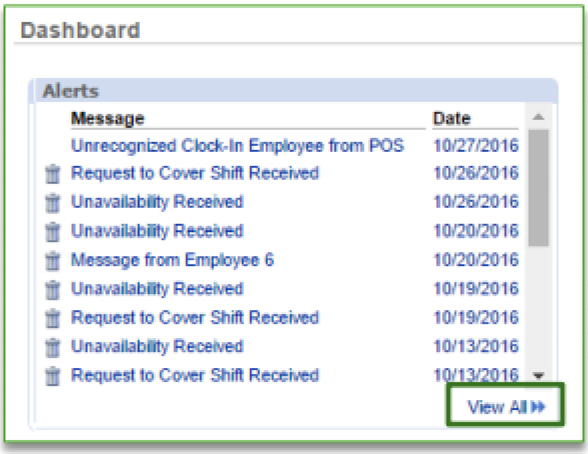


Standard Dashboard View

The standard dashboard view (as part of the Core package) contains alerts, general sales data, and weather forecasts for your store(s).

- Alerts: Encompass employee, corporate and system messaging (such as suggested reorders, par levels and inventory transfer status notifications)
  - You also have the ability to access current and arrived alerts by clicking the View All link at the bottom right corner of the Alerts box on the Dashboard

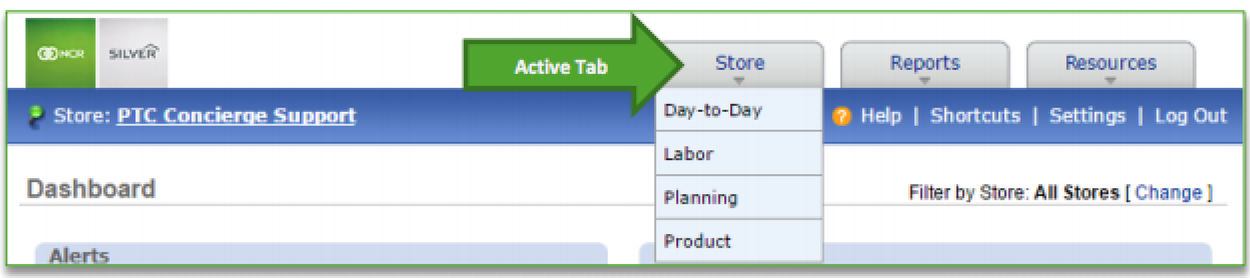
    ◦ Alerts are also filterable by date, status or subject



- Sales Data: Includes current data, historical comparisons (where historical information is available) and forecasting based on your store's sales history
- Weather: The dashboard will show a three day outlook which can be expanded to show additional days

Navigating Away From Your Dashboard

To navigate away from your Dashboard to other areas of the site, hover over the active tabs at the top of the page to select a sub category, or click on the active tabs to go to that category's page.



Platform Features

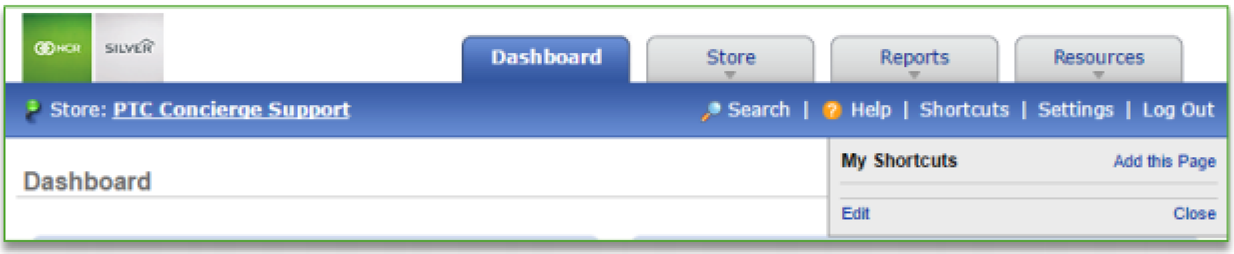
Each active tab contains a subset of features specific to the category you've selected.
You may notice features referenced below that may not be visible on your platform as you move through various sections of Console. Note that your access to specific features is dependent on what you sign up for and/or have permissions to see.

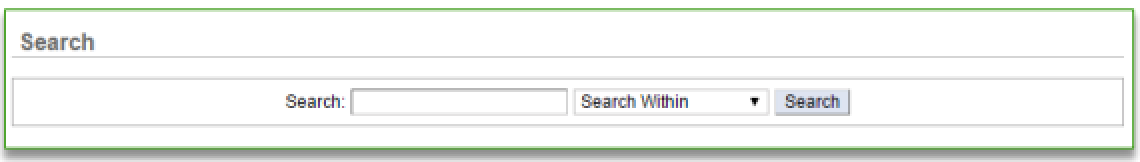
- Store Tab: Gives access to operational tools that allow you to plan for day to day business activities. This includes, but is not limited to, managing labor, managing inventory, settings sales and/or labor goals, and submitting reviews.

- Reports Tab: Provides an array of reports based on your chosen Console package. This may include reports pertaining to sales, labor, customer service, surveys, product mix, operational reviews, training and brand specific custom reporting.
- Resources Tab: Gives access to document storage (including documents shared with you by others), videos, and a photo gallery.

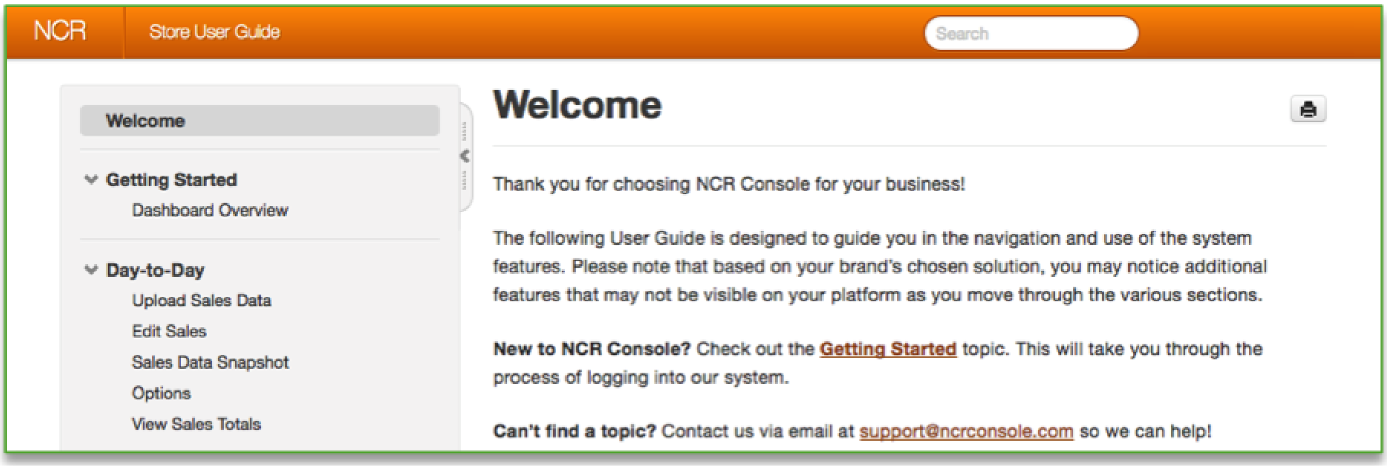
Additional Dashboard Features

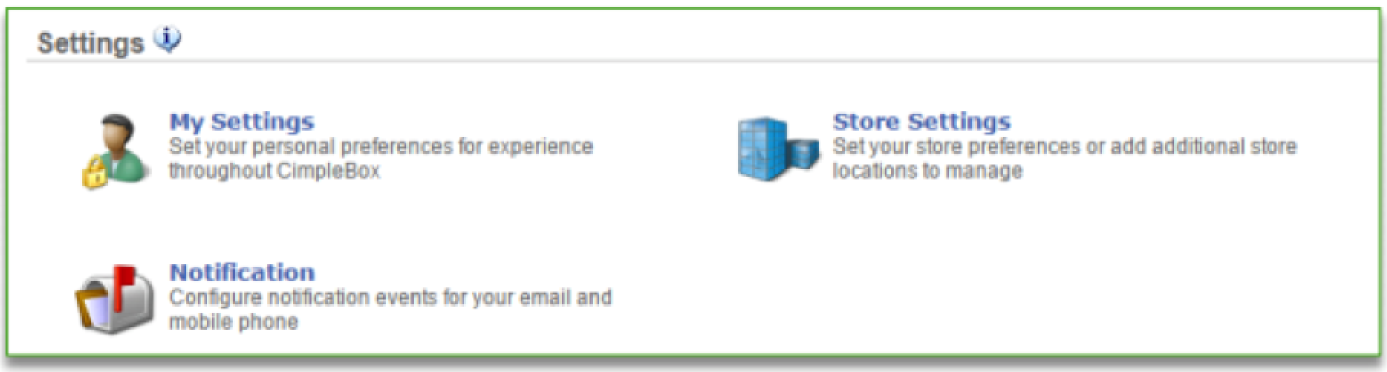
In the blue bar beneath the tabs at the top of the page, you will have the option to search for specific topics, access help documents, add shortcuts to favorite or frequently visited pages, and adjust settings.





For more information about how to adjust settings, please see the Console Settings user guide.





- **[Click here to see the full details]**

Day-to-Day

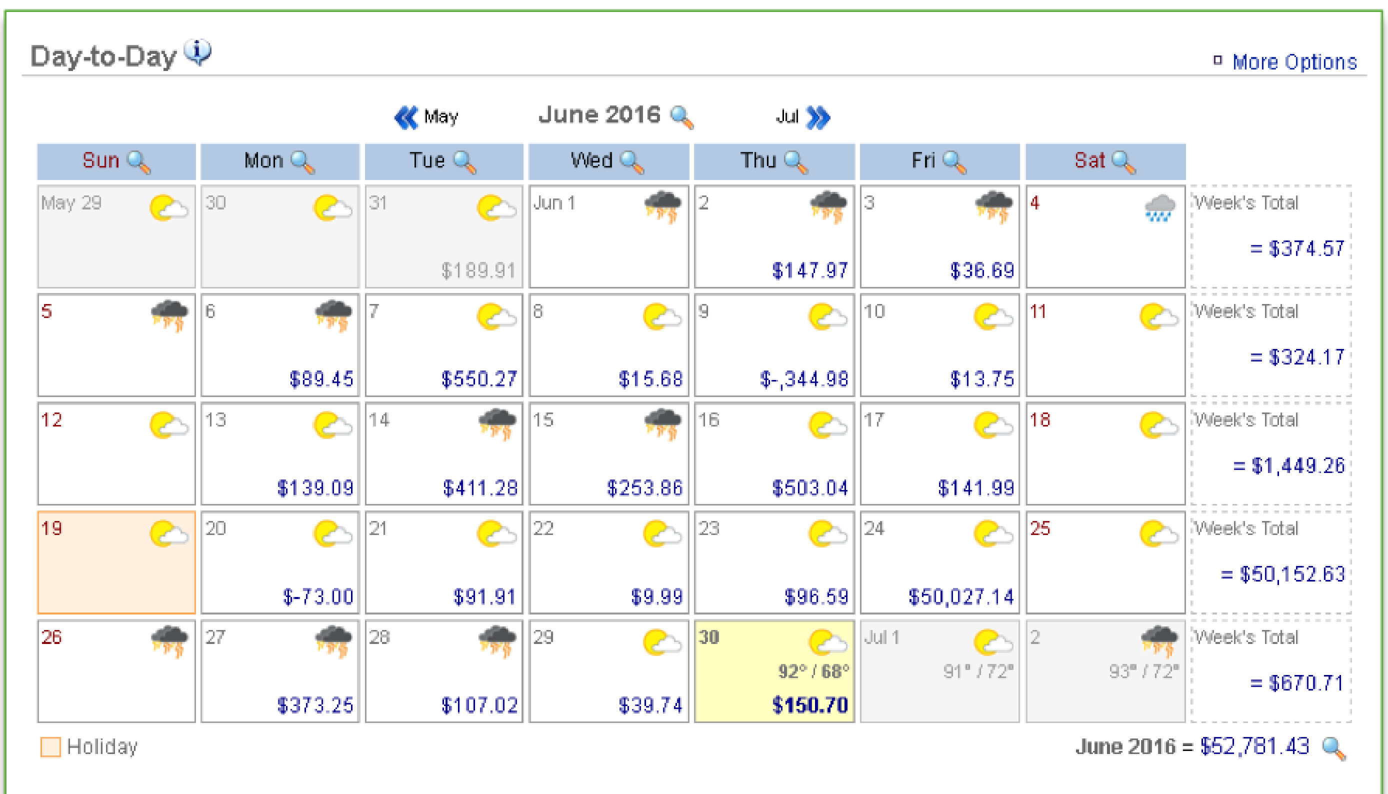
In this module, you will learn about:

- The information contained within the Day to Day calendar
- How to navigate to, and within, the Day to Day calendar

Day to Day Calendar Information

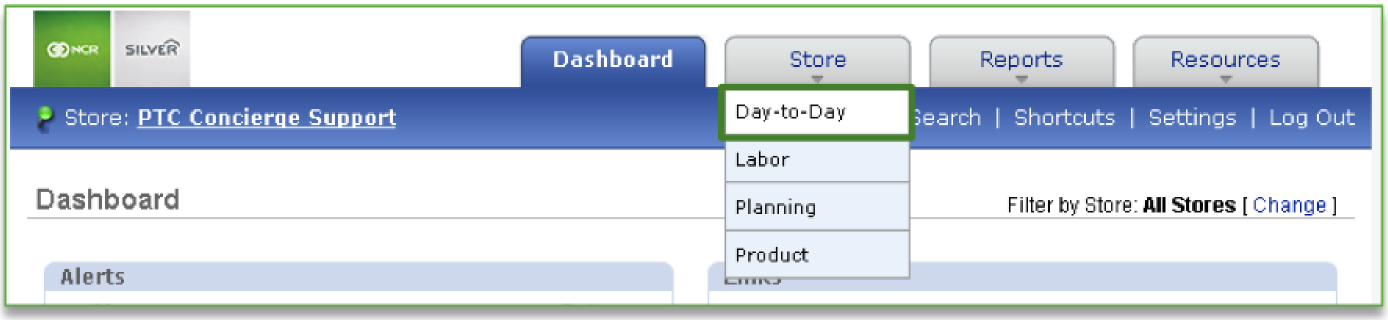
The Day to Day calendar allows you to quickly view:

- Daily, weekly, and monthly sales data for your store, including transaction count and average ticket
- Daily, weekly, and monthly product mix information
- Labor percentage
- Daily notes
- Weather forecast

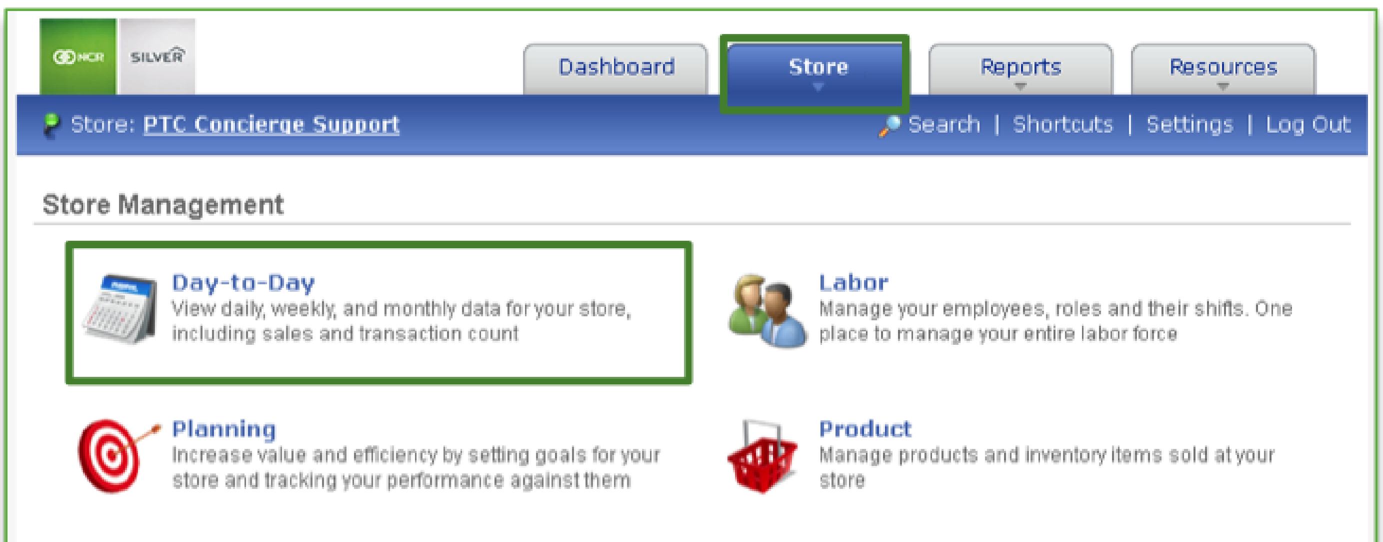


Navigating to the Day to Day Calendar

From your Dashboard view, mouse over the ***Store*** tab and click ***Day-to-Day***. The Day to Day calendar will appear for the current month.



You can also access the Day to Day calendar by clicking on the ***Store*** tab and then on ***Day-to-Day*** from the ***Store Management*** screen.



Navigating Within the Day to Day Calendar

Once you have accessed your Day to Day calendar view, you will see a snapshot of daily, weekly and monthly sales data, as well as the weather for each day.

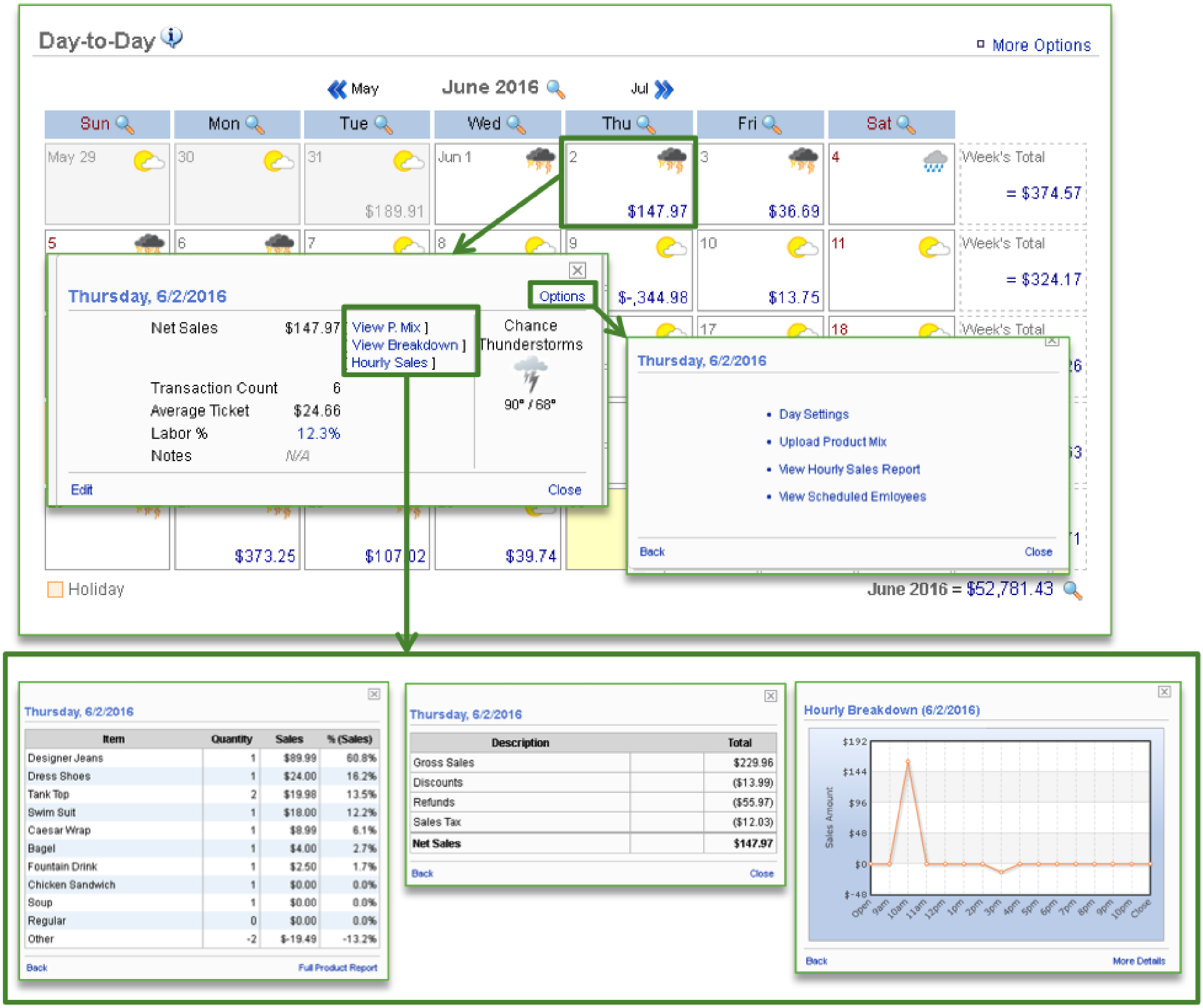
- Weekly sales totals will be reflected to the right of the calendar
- Monthly sales total will appear at the bottom right corner of the calendar
- Click the << and >> icons at the top of the calendar to toggle between months

- You can drill down for additional detail by clicking on any date within the calendar view, weekly total (to the right of the calendar), the magnifying glass next to the monthly total (at the bottom right of the calendar view), or the week day (at the top of the calendar)

Daily Snapshot

Click any date within the calendar view to see Net Sales, Transaction Count, Average Ticket and Labor Percentage information for that day.

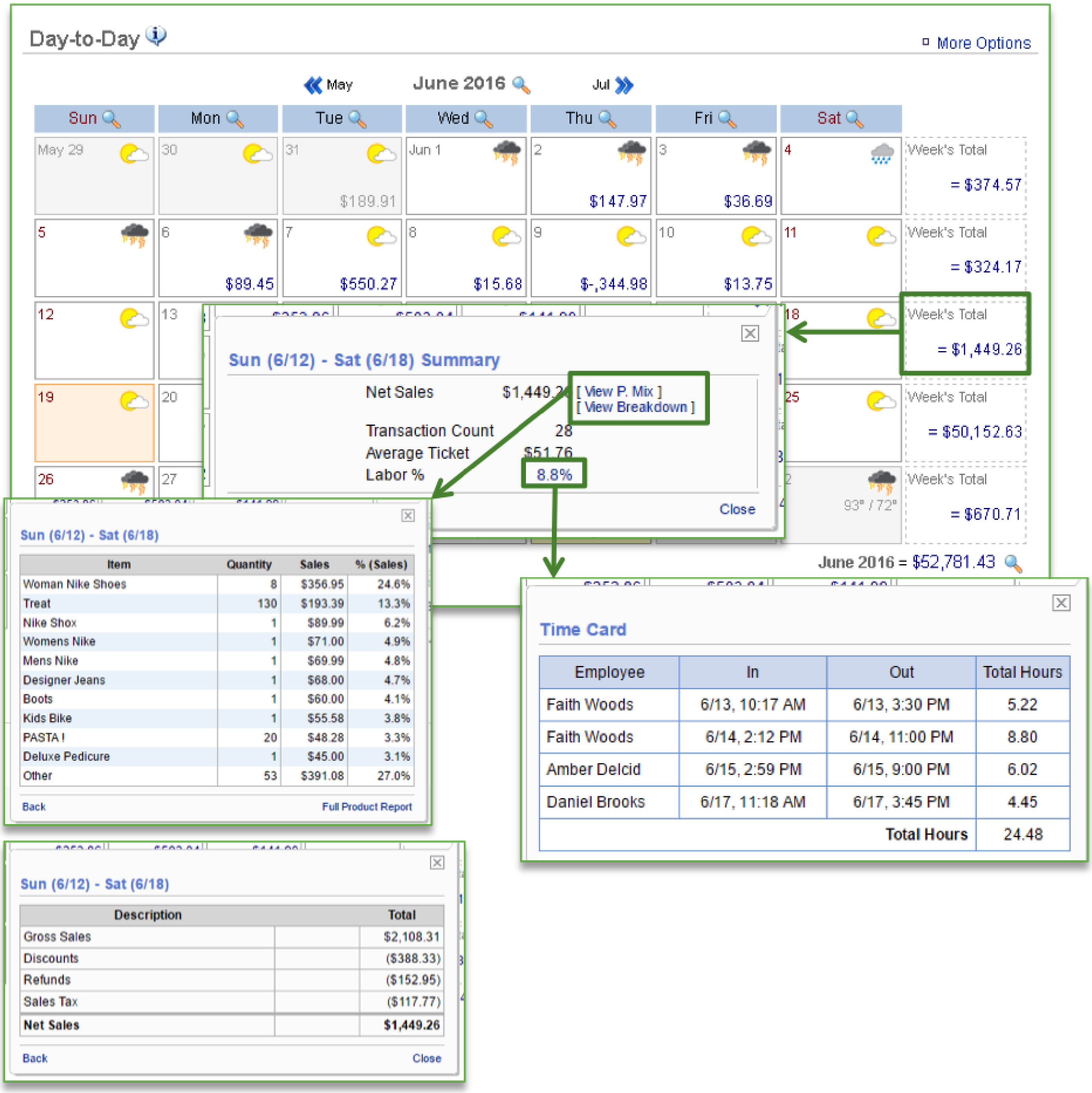
- *To the right of Net Sales, you'll have the option to view Product Mix information, Net Sales breakdown and Hourly Sales information*
- *Click Options to view and set Day Settings, view Hourly Sales information and see Scheduled Employees*



Weekly Snapshot

Click any ending week total within the calendar view to see Net Sales, Transaction Count, Average Ticket and Labor Percentage information for that week.

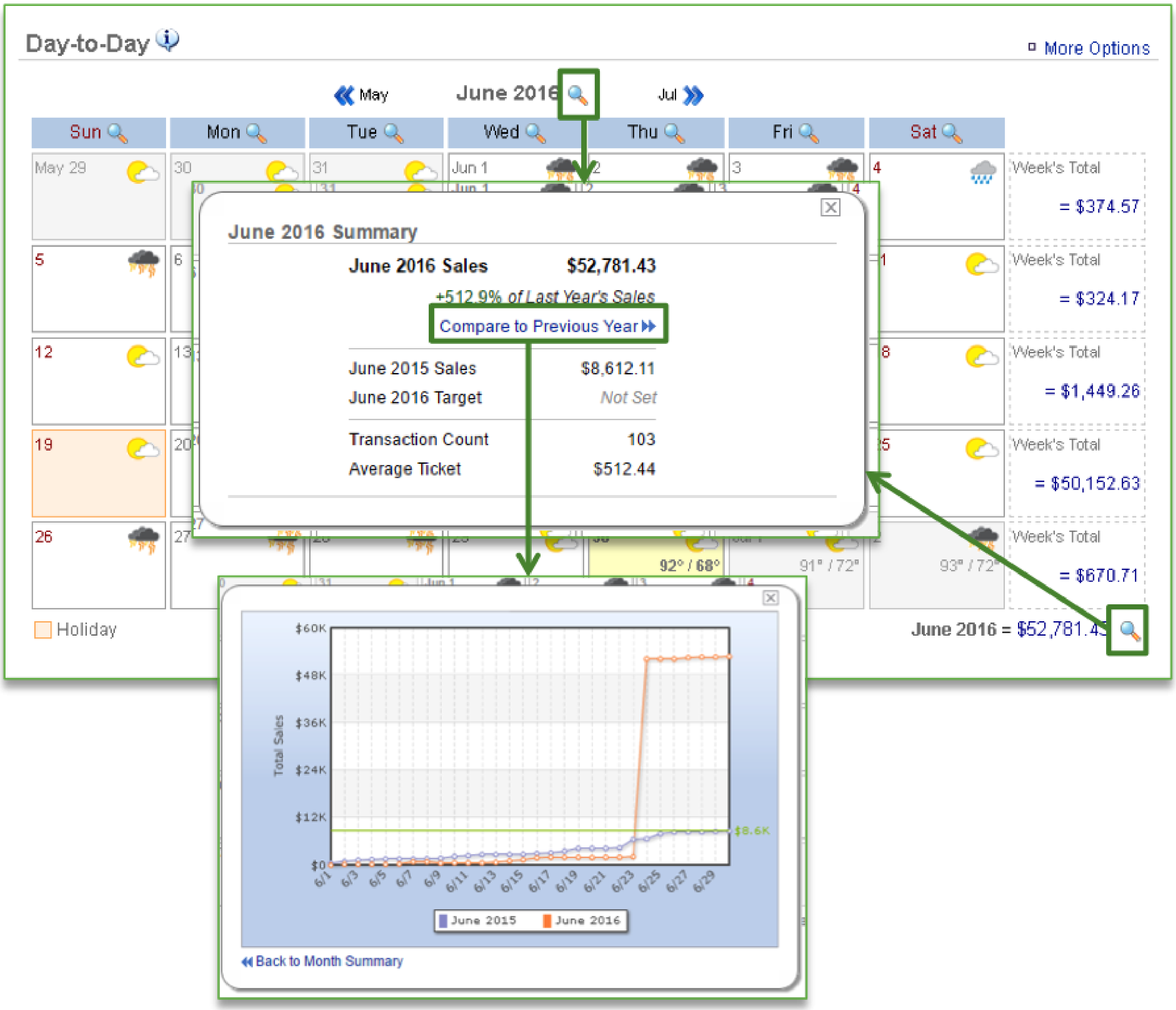
- *To the right of Net Sales, you'll have the ability to view Product Mix information, and Net Sales breakdown*
- *To the right of Labor %, you'll have the ability to view time card information for the week*



Monthly Snapshot

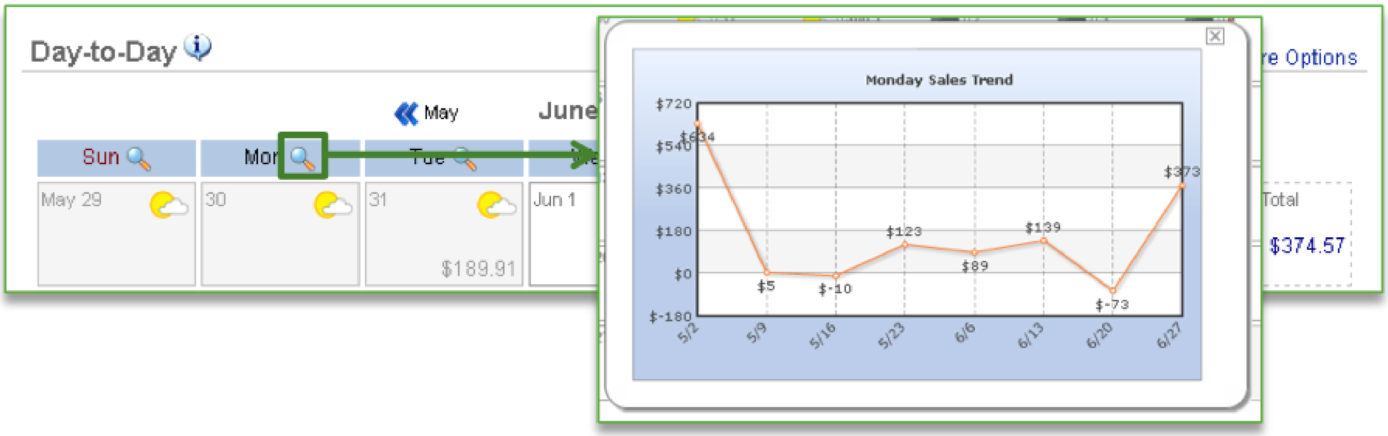
Click the magnifying glass icon to the right of the month at the top of the page or at the bottom right within the calendar view to see Net Sales, Prior Year Sales, Sales Target, Transaction Count, and Average Ticket information for that month.

- *Below net sales, you'll have the ability to compare sales to the prior year if that information exists within your Console account*



Week Day Snapshot

Click the magnifying glass icon to next to any day of the week to view the week day sales trend for that day.



Related Topics

[Upload Sales Data]

[Edit Sales]

[Sales Data Snapshot]

[Options (for additional management)]

[View Sales Totals]

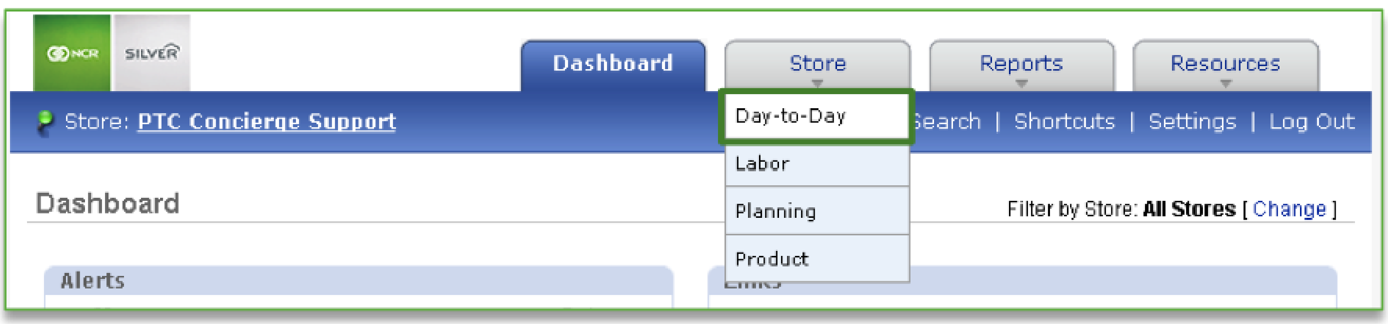
Upload Sales Data

In this module, you will learn about:

- How to upload sales data via the Day to Day calendar platform

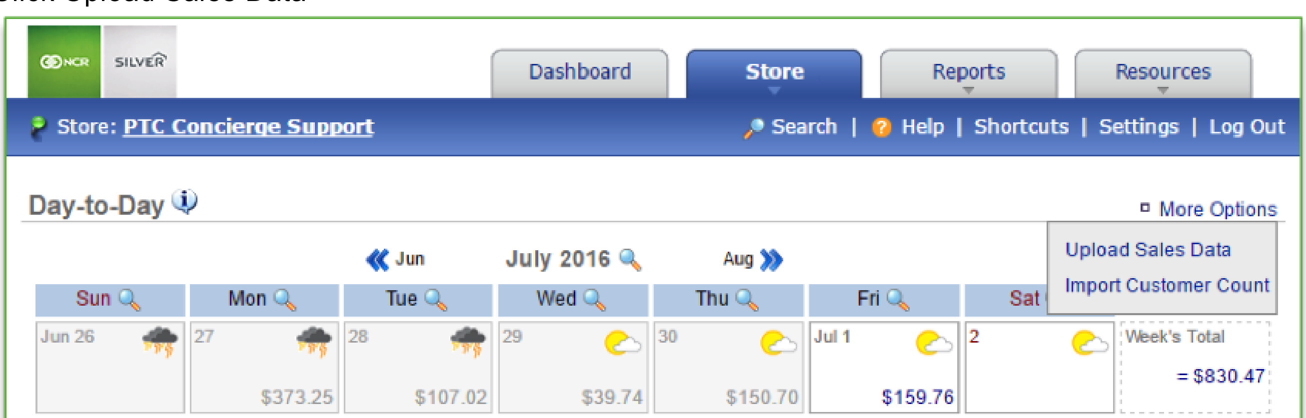
Upload Sales Data

The *Upload Sales Data* feature is typically used when historical data needs to be entered prior to the integration of Console software; or when sales need to be adjusted for a specific day.
To upload sales data you will need to navigate to the Day-to-Day calendar within the Store Management platform.



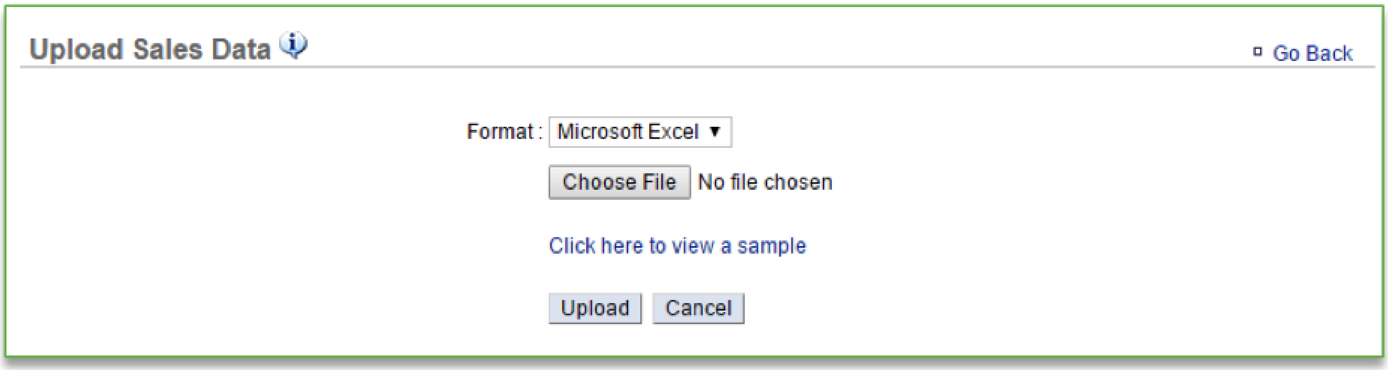
To Upload Sales Data

1. Click More Options
2. Click Upload Sales Data

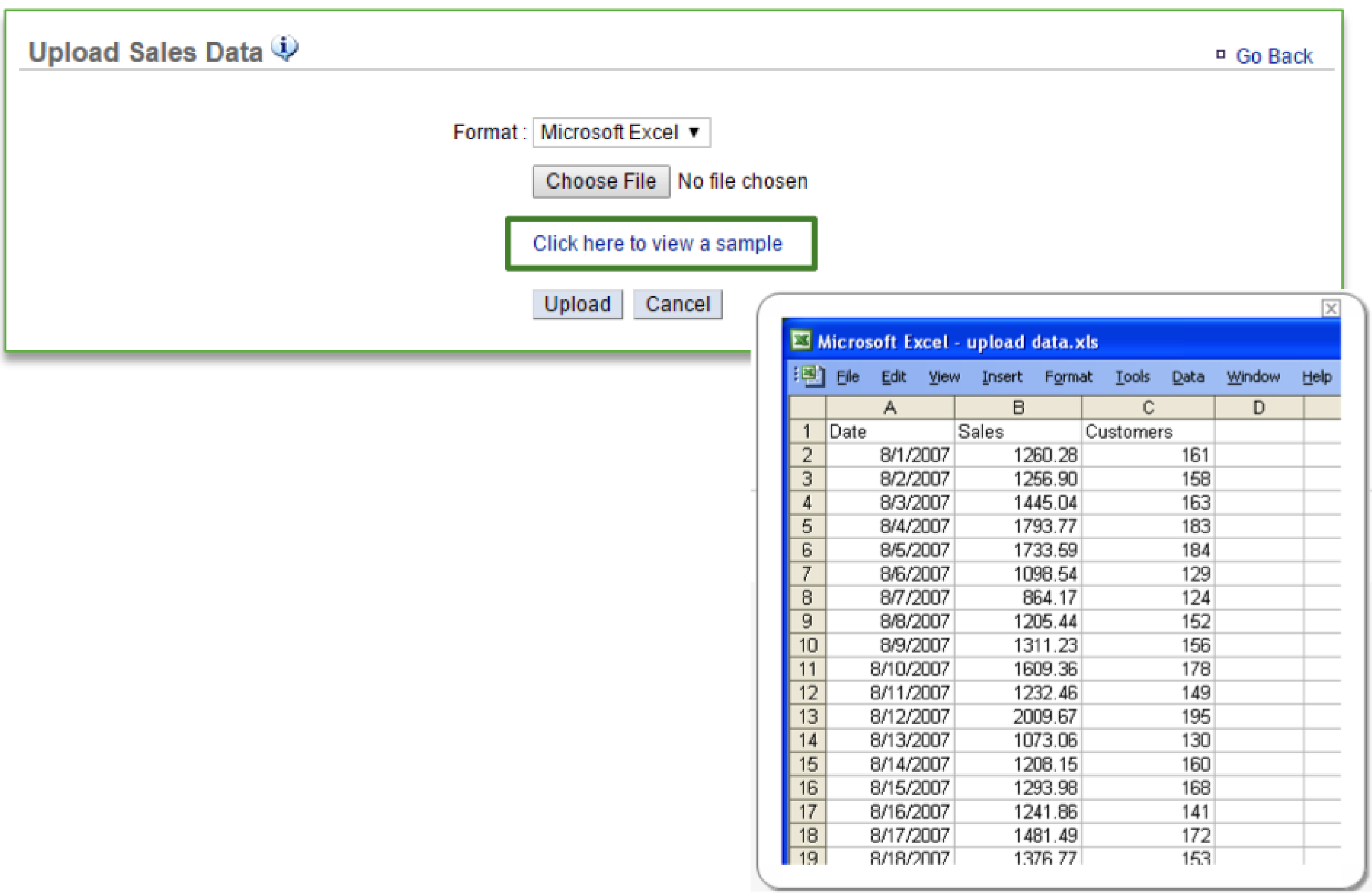


3. Select Format

4. Choose file type
    a. This should be a file you have saved to your computer in an Excel format
5. Click Upload (*Click **Cancel** at any time to cancel your changes and navigate back to the previous screen*). Keep in mind that uploading sales data will override anything that may already be in the system. You will be asked to confirm your choice before the upload takes place.



<u>Note</u>: To view an example of the required format, click ***"Click here to view a sample"***.



	A	B	C	D
1	Date	Sales	Customers	
2	8/1/2007	1260.28	161	
3	8/2/2007	1256.90	158	
4	8/3/2007	1445.04	163	
5	8/4/2007	1793.77	183	
6	8/5/2007	1733.59	184	
7	8/6/2007	1098.54	129	
8	8/7/2007	864.17	124	
9	8/8/2007	1205.44	152	
10	8/9/2007	1311.23	156	
11	8/10/2007	1609.36	178	
12	8/11/2007	1232.46	149	
13	8/12/2007	2009.67	195	
14	8/13/2007	1073.06	130	
15	8/14/2007	1208.15	160	
16	8/15/2007	1293.98	168	
17	8/16/2007	1241.86	141	
18	8/17/2007	1481.49	172	
19	8/18/2007	1376.77	153	

Related Topics

[Edit Sales]
[Sales Data Snapshot]
[Options (for additional management)]
[View Sales Totals]

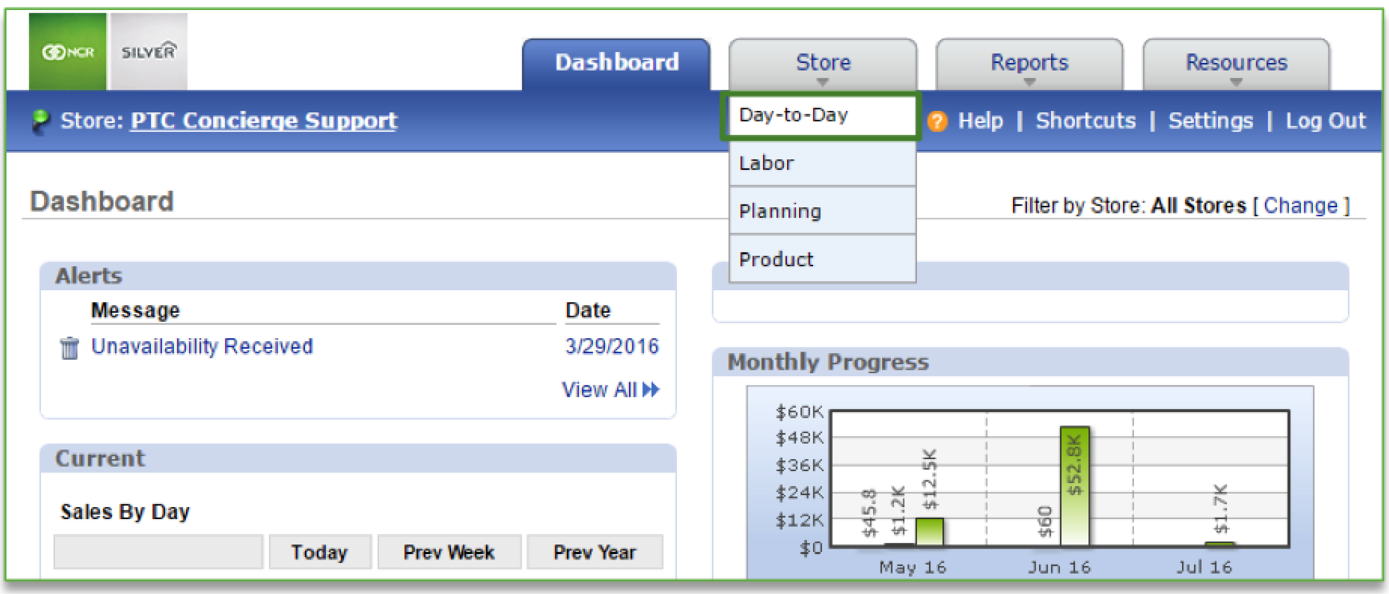
Edit Sales

In this module, you will learn about:

- How to edit sales via the Day to Day calendar platform

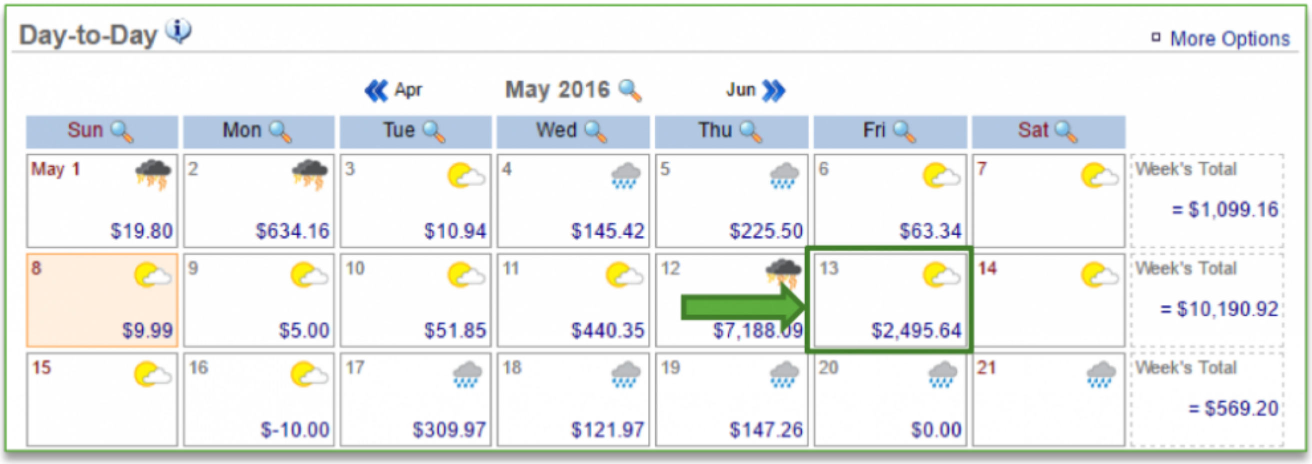
Which URL is Right for You?

The *Edit Sales* feature is typically used when sales need to be adjusted for a specific day or set of days. It can also be used to add ntoes for selected days.
To edit sales you will need to navigate to the Day-to-Day calendar within the Store Management platform.

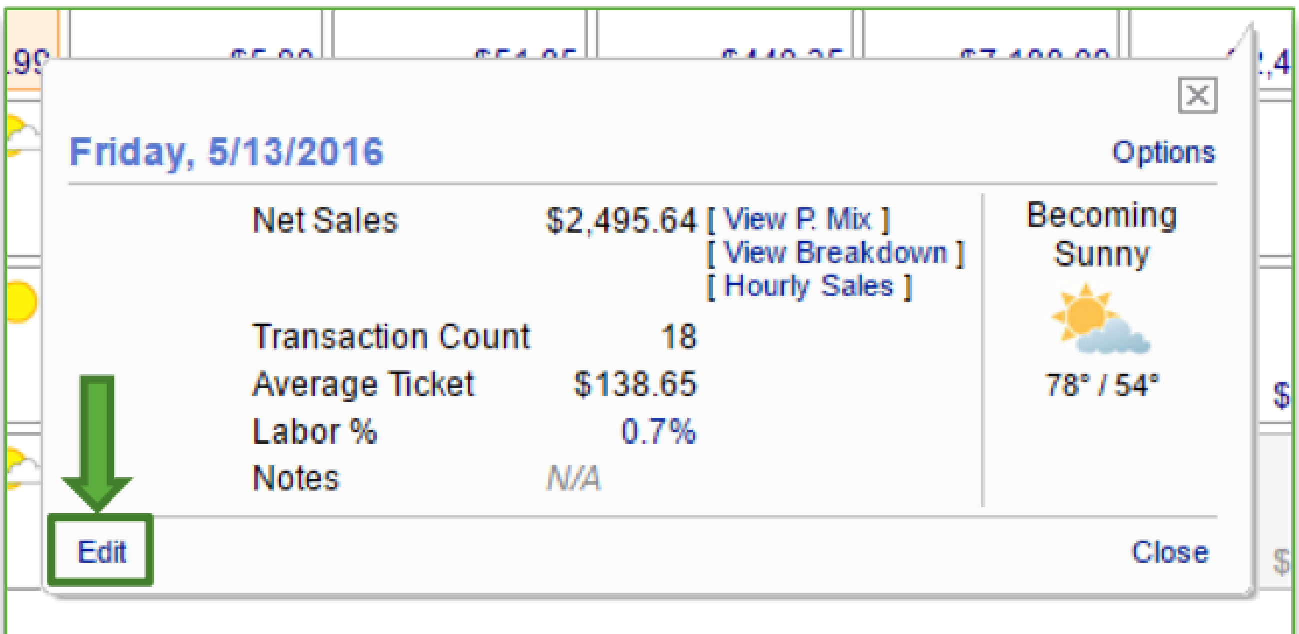


To Edit Sales

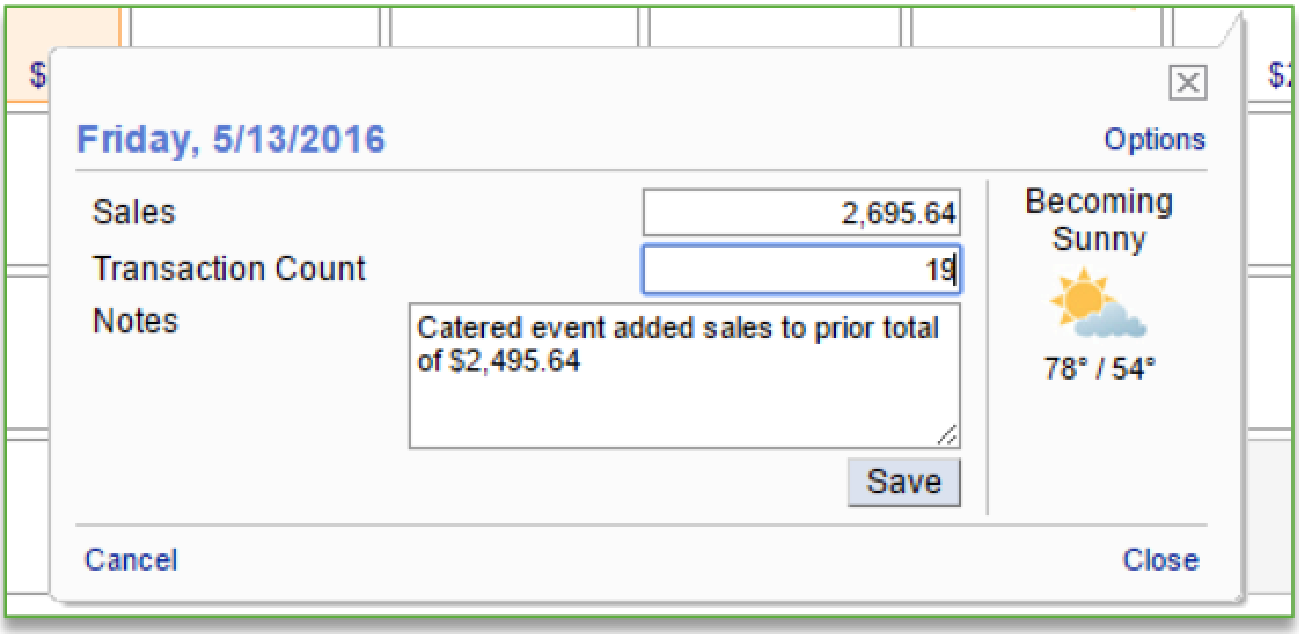
1. Click on the day you wish to edit to bring up more detailed information



2. From the window that opens, click **Edit** in the bottom left corner of the window



3. This will bring up a box that allows you to enter the necessary changes and/or add notes for the day



4. Click **Save** when done

Related Topics

[Upload Sales Data]

[Sales Data Snapshot]

[Options (for additional management)]

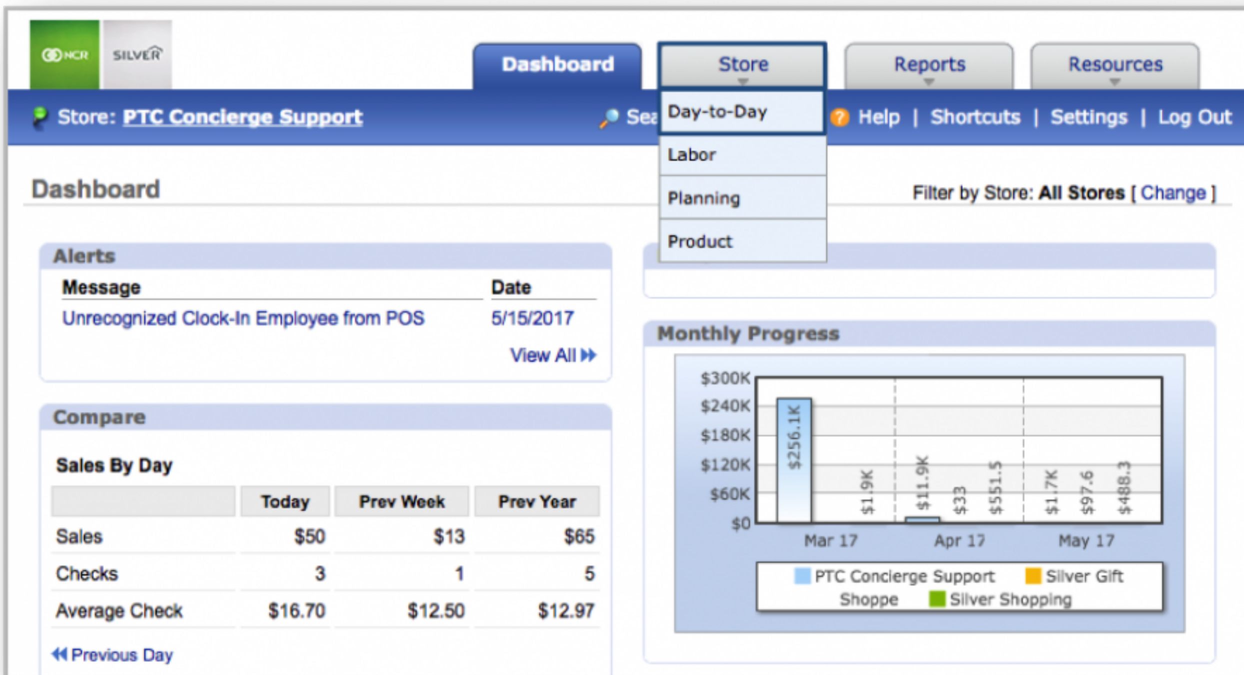
[View Sales Totals]

Sales Data Snapshot

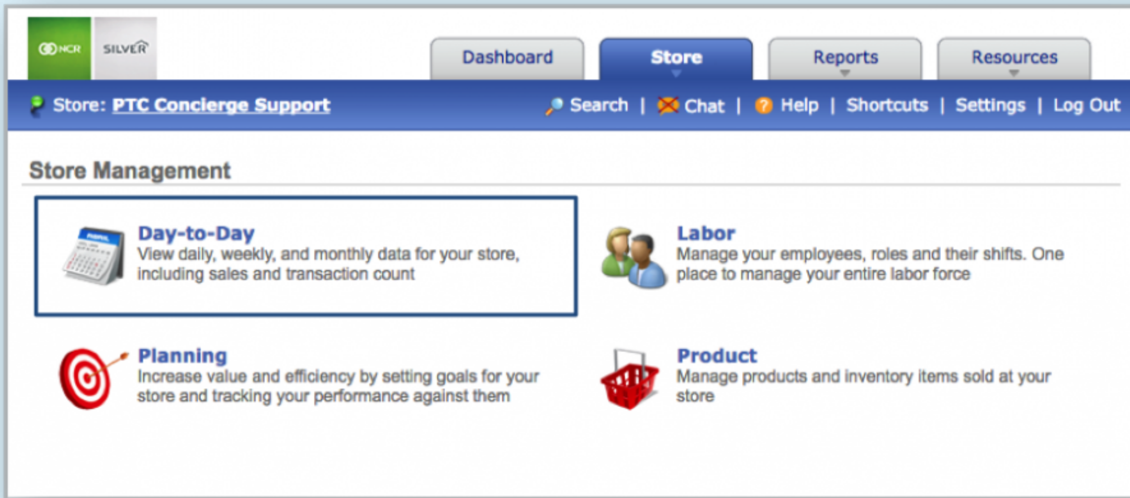
The purpose of this section is to illustrate the additional features that are available to you for viewing additional information for specific days within the Day-to-Day snapshot.

Sales Data Snapshot

STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Day-to-Day***.

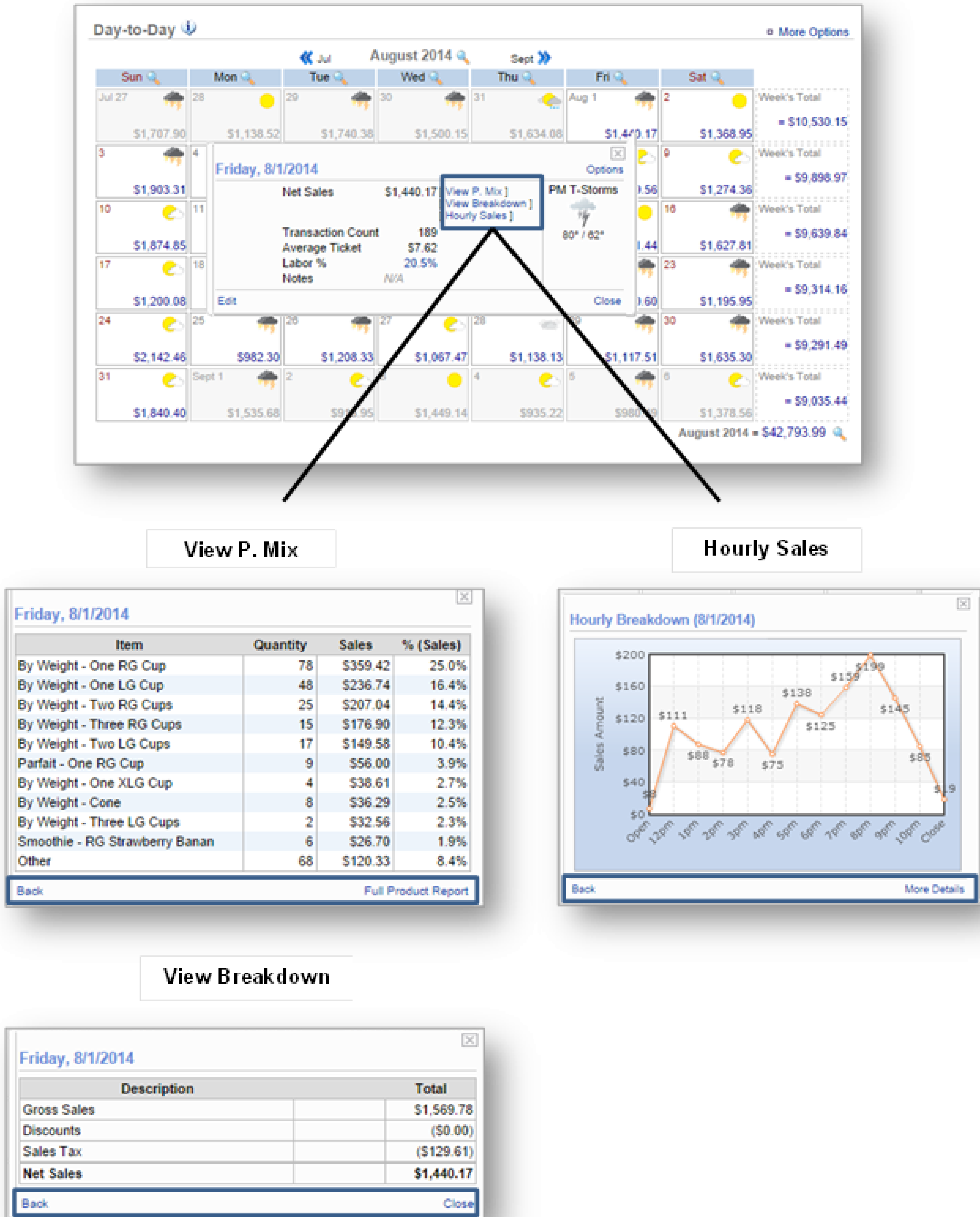


✻ ***Hint:*** You can also access ***Day-to-Day*** by clicking on the ***Store*** tab and then on ***Day-to-Day*** from the Store Management screen.



STEP 2: When looking at sales data for a specific day, you will have the option to view additional information for that day, such as *Product Mix, Net Sales and Hourly Breakdown*. To view more detailed information for *Product Mix*, click ***Full Product Report*** at the bottom right corner of that window. For more detailed information regarding *Hourly Sales*, click ***More Details*** at the bottom right corner of that window to

go the full report.



Friday, 8/1/2014

Item	Quantity	Sales	% (Sales)
By Weight - One RG Cup	78	$359.42	25.0%
By Weight - One LG Cup	48	$236.74	16.4%
By Weight - Two RG Cups	25	$207.04	14.4%
By Weight - Three RG Cups	15	$176.90	12.3%
By Weight - Two LG Cups	17	$149.58	10.4%
Parfait - One RG Cup	9	$56.00	3.9%
By Weight - One XLG Cup	4	$38.61	2.7%
By Weight - Cone	8	$36.29	2.5%
By Weight - Three LG Cups	2	$32.56	2.3%
Smoothie - RG Strawberry Banan	6	$26.70	1.9%
Other	68	$120.33	8.4%

Friday, 8/1/2014

Description		Total
Gross Sales		$1,569.78
Discounts		($0.00)
Sales Tax		($129.61)
Net Sales		**$1,440.17**

Related Topics

Upload Sales Data

Edit Sales

Options (for additional management)

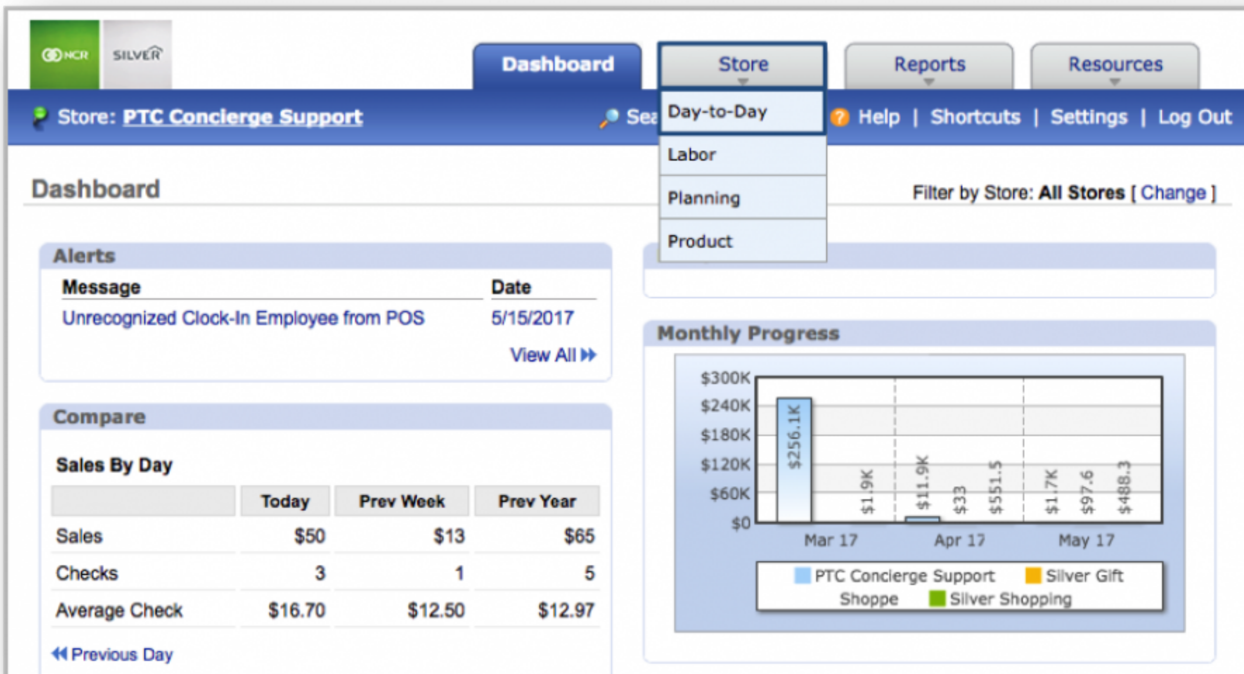
View Sales Totals

Options

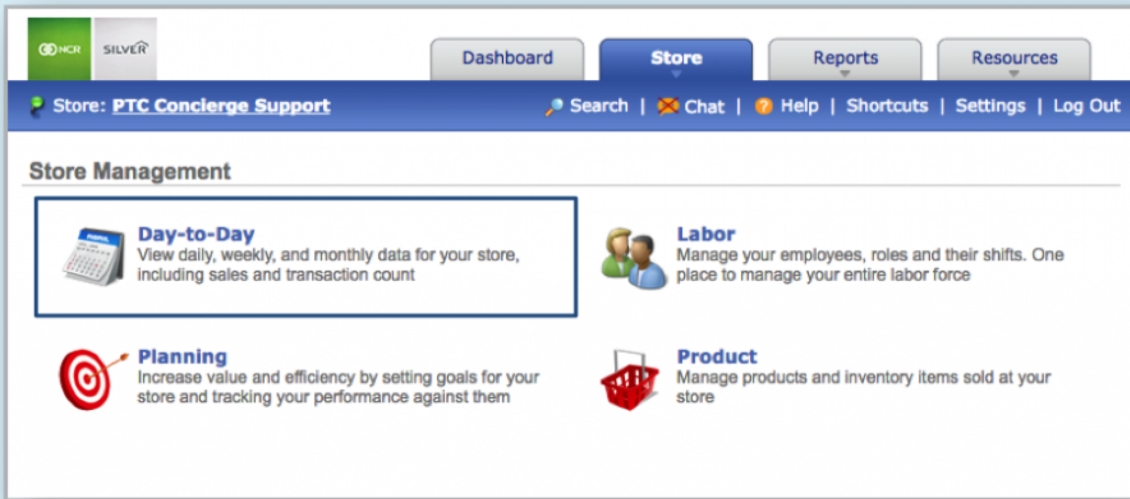
The purpose of this section is to illustrate how to navigate through the options for adjusting daily settings, uploading a product mix, viewing an hourly sales report or viewing scheduled employees for specific days within the Day-to-Day snapshot.

Options

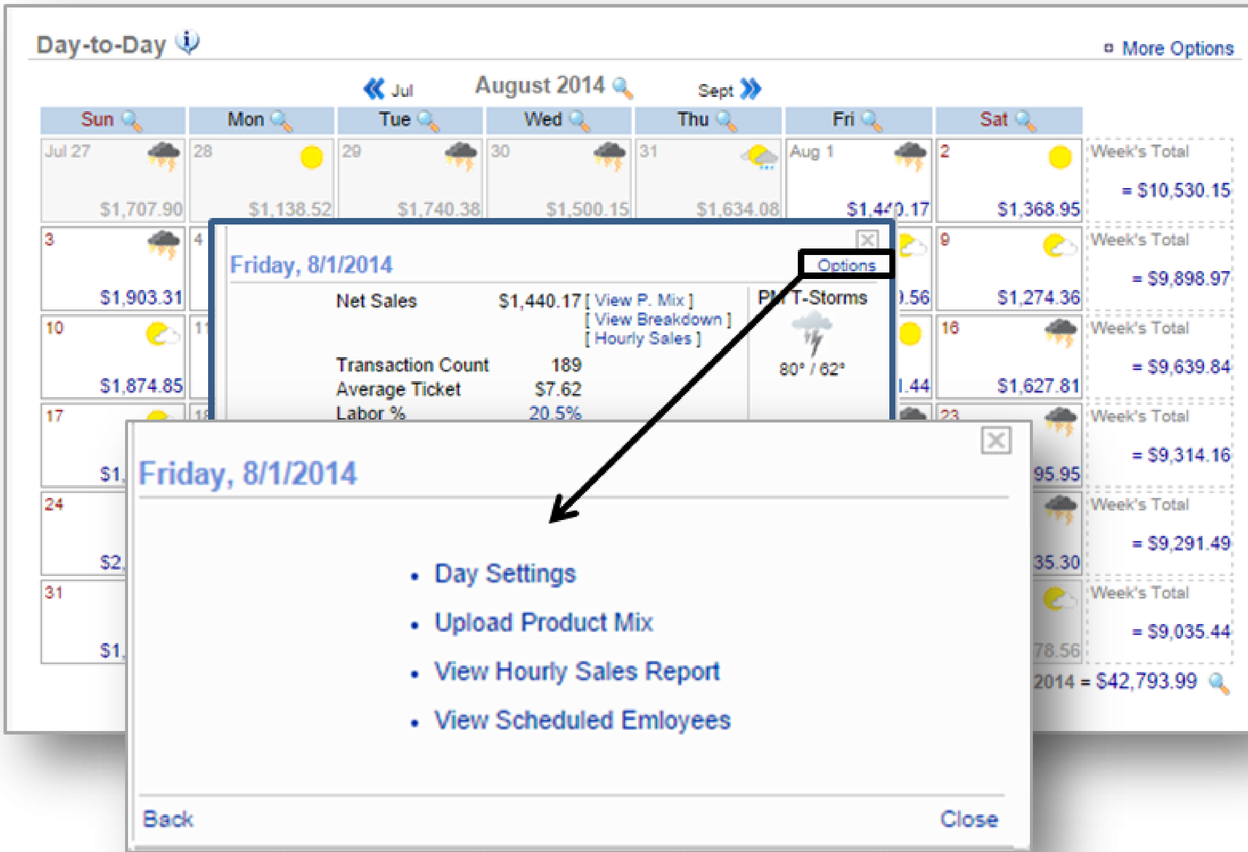
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Day-to-Day***.



✻ ***Hint:*** You can also access ***Day-to-Day*** by clicking on the ***Store*** tab and then on ***Day-to-Day*** from the Store Management screen.



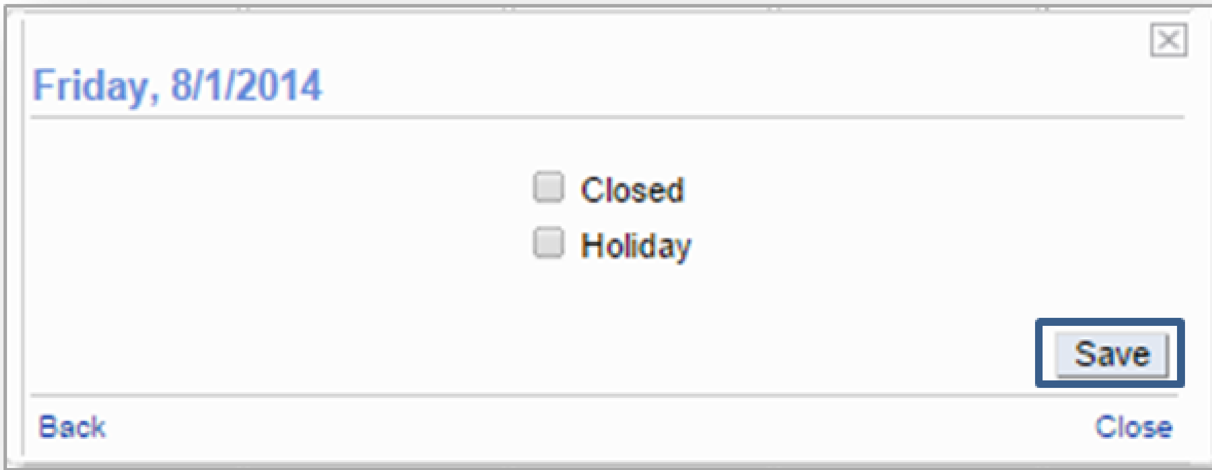
STEP 2: Click ***Options*** at the top right to adjust *Daily Settings, Upload a Product Mix, View an Hourly Sales Report or View Scheduled Employees*.



Day Settings

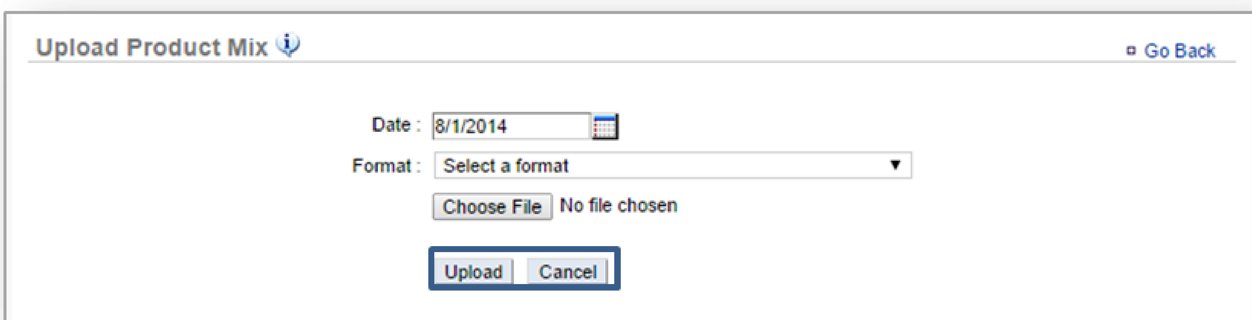
Click to see it in action

To adjust daily settings, click ***Day Settings***. From the window that opens, click ***Closed*** and/or ***Holiday*** and then Save.



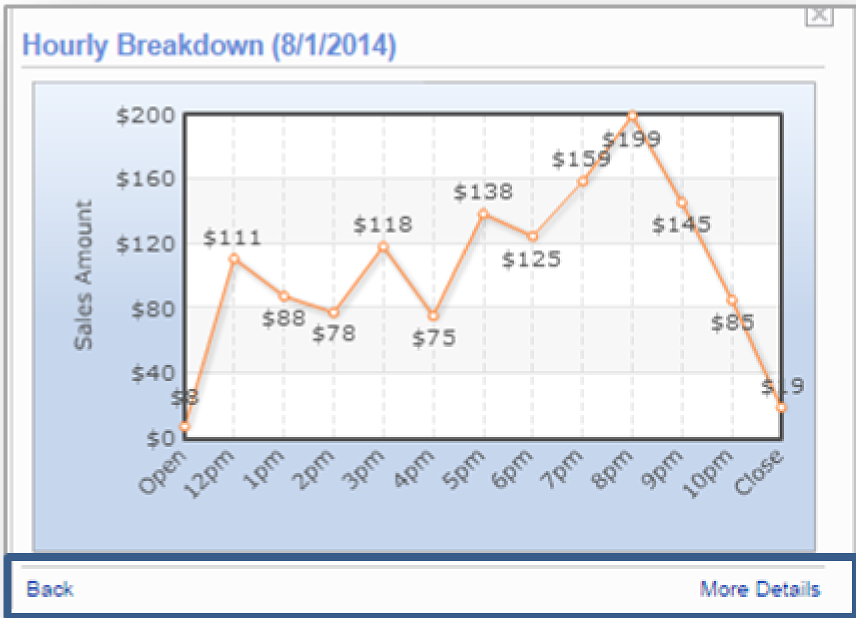
Upload Product Mix

To upload a product mix, click Upload Product Mix. From the window that opens, select the desired date and choose your format. Next, click* _Choose File_* to upload your file from your computer and click ***Upload***.



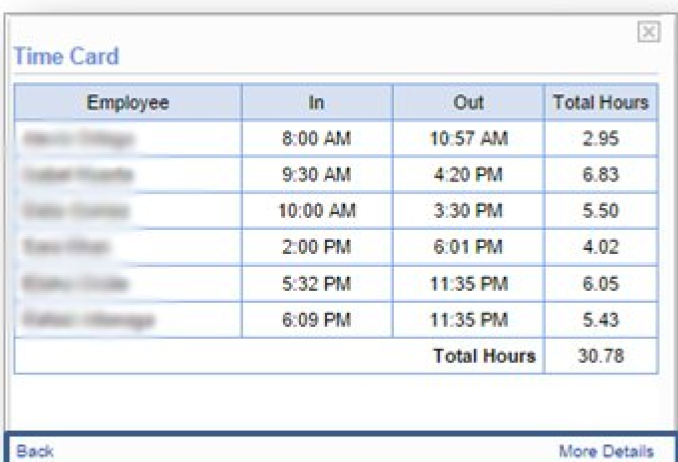
View Hourly Sales Report

To view your hourly sales report, click ***View Hourly Sales Report***. A snapshot of your hourly sales will appear. Click ***More Details*** to view more detailed information.



View Scheduled Employees

To view that employees that were/are scheduled for a specific day, click ***View Scheduled Employees***. A snapshot of your scheduled employees will appear. Click ***More Details*** to access your entire team roster and to view more detailed information.



Time Card

Employee	In	Out	Total Hours
[illegible]	8:00 AM	10:57 AM	2.95
[illegible]	9:30 AM	4:20 PM	6.83
[illegible]	10:00 AM	3:30 PM	5.50
[illegible]	2:00 PM	6:01 PM	4.02
[illegible]	5:32 PM	11:35 PM	6.05
[illegible]	6:09 PM	11:35 PM	5.43
		Total Hours	30.78

Back More Details

Related Topics

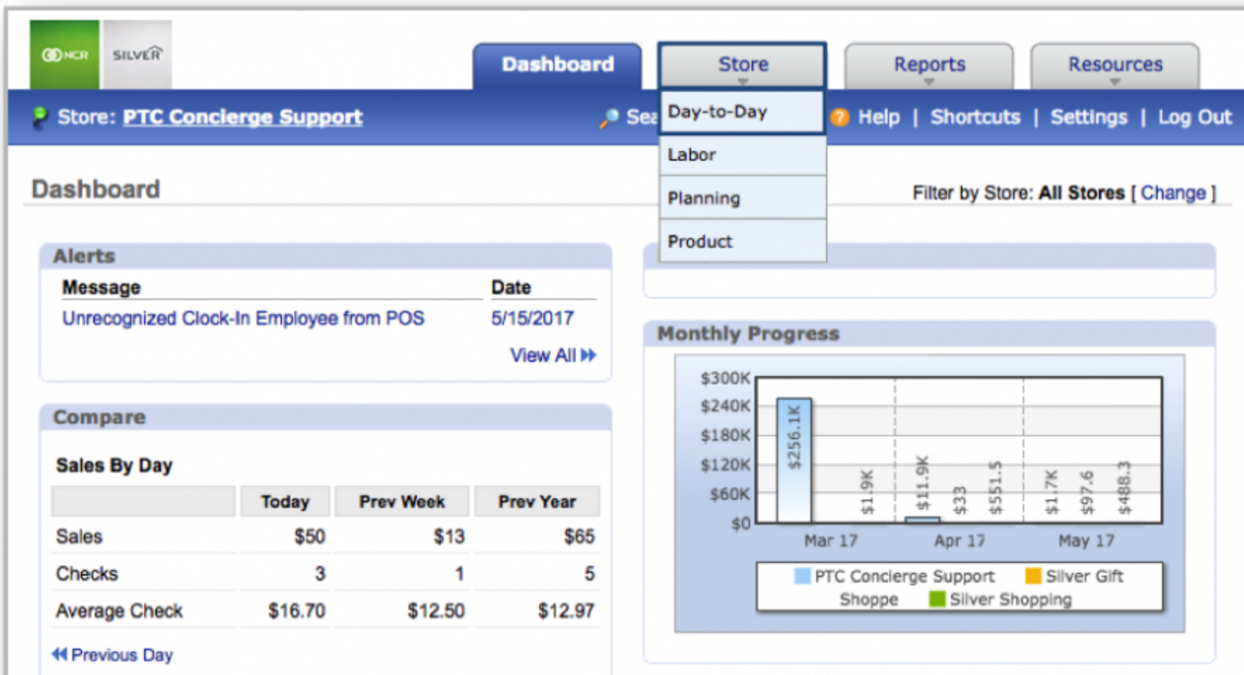
[Upload Sales Data](#)
[Edit Sales](#)
[Sales Data Snapshot](#)
[View Sales Totals](#)

View Sales Totals

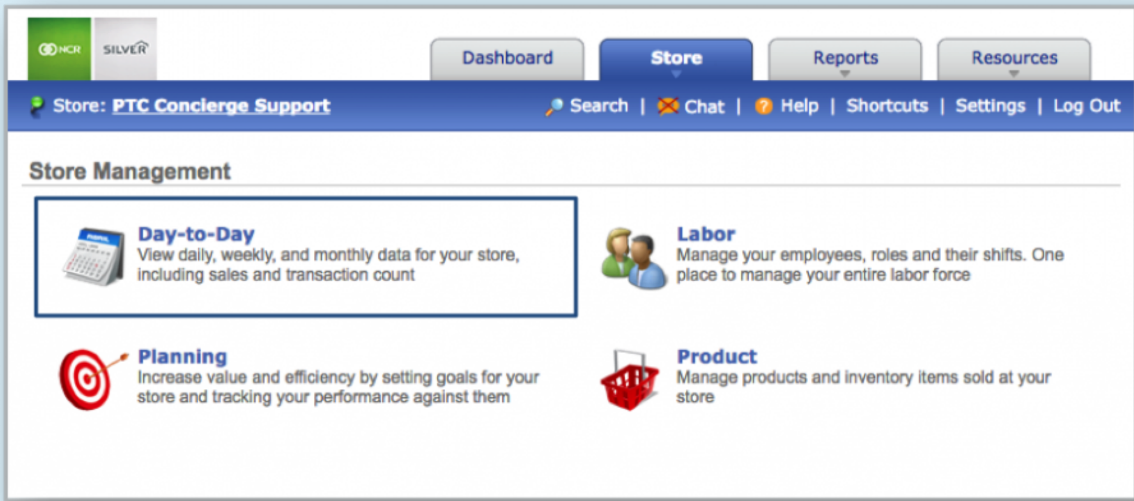
The purpose of this section is to illustrate how to view additional information for sales totals within the Day-to-Day snapshot.

Viewing Sales Totals

From your Dashboard view, mouse over the ***Store*** tab and click ***Day-to-Day***.

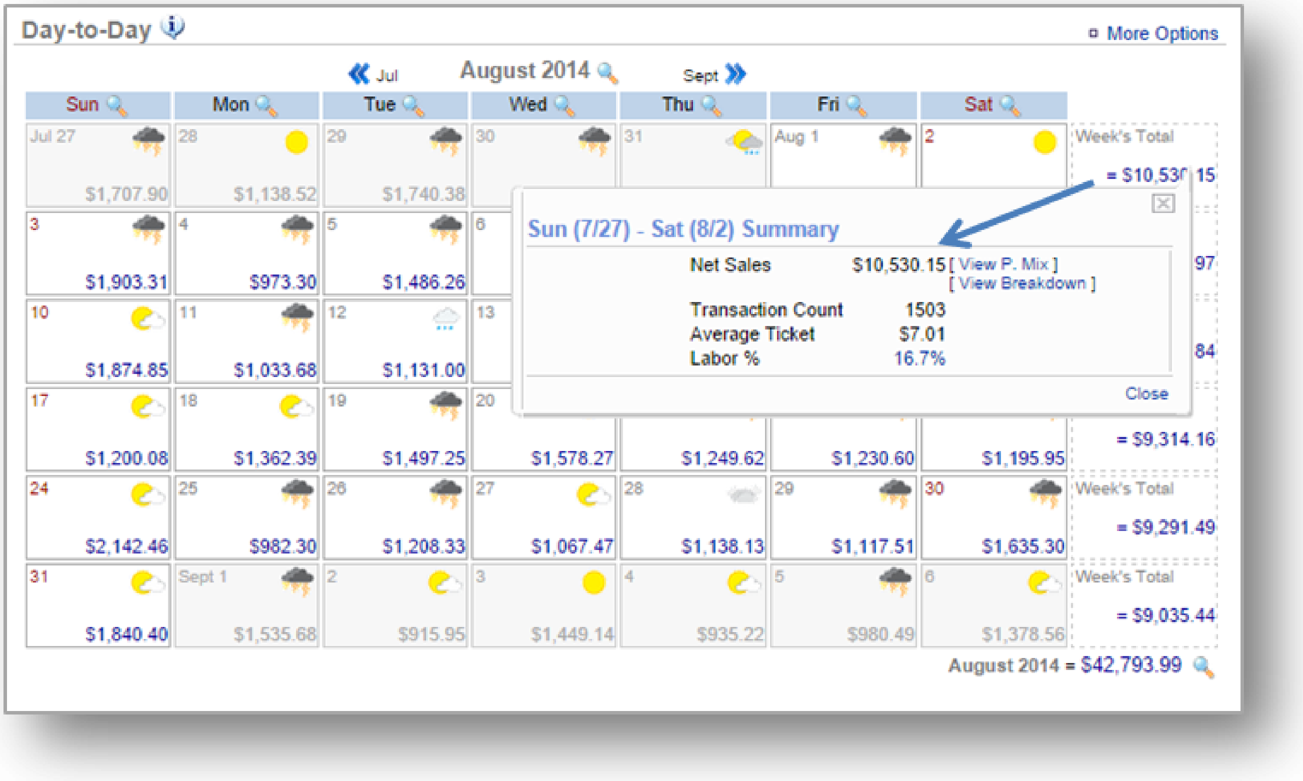


Hint: You can also access ***Day-to-Day*** by clicking on the ***Store*** tab and then on ***Day-to-Day*** from the Store Management screen.



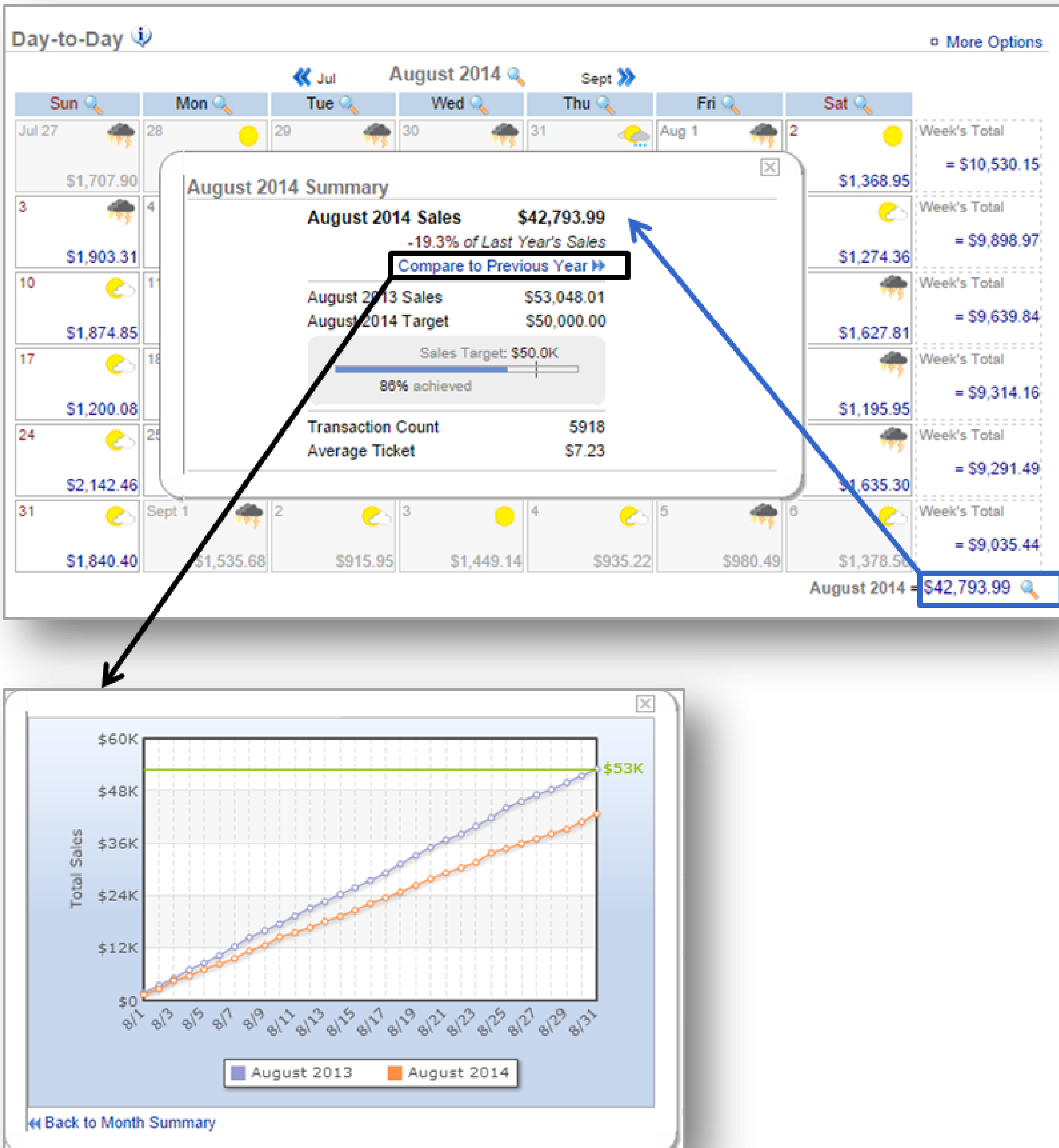
Weekly Totals

Click on a week to the right to view that week's sales totals. You will have the option to *View Product Mix* and *Hourly Breakdown* by clicking on these links at the top right corner of the window the appears.



Monthly Total

Click on the monthly sales total at the bottom right corner of the screen to view the monthly *Summary*. You can compare this total to last year's sales by clicking ***Compare to Previous Year***.



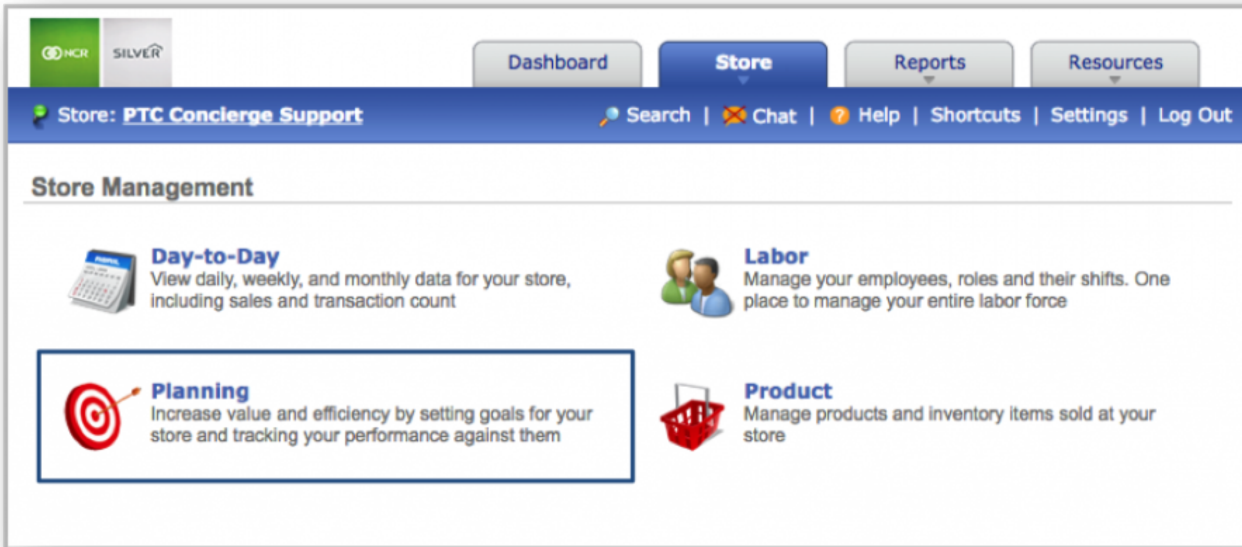
Related Topics

[Upload Sales Data]

Edit Sales
Sales Data Snapshot
Options (for additional management)

Store Planning

Effective store planning allows you to set specific sales goals and track progress of those goals by month, period or year. For more information on how to set a sales target, click **here**!



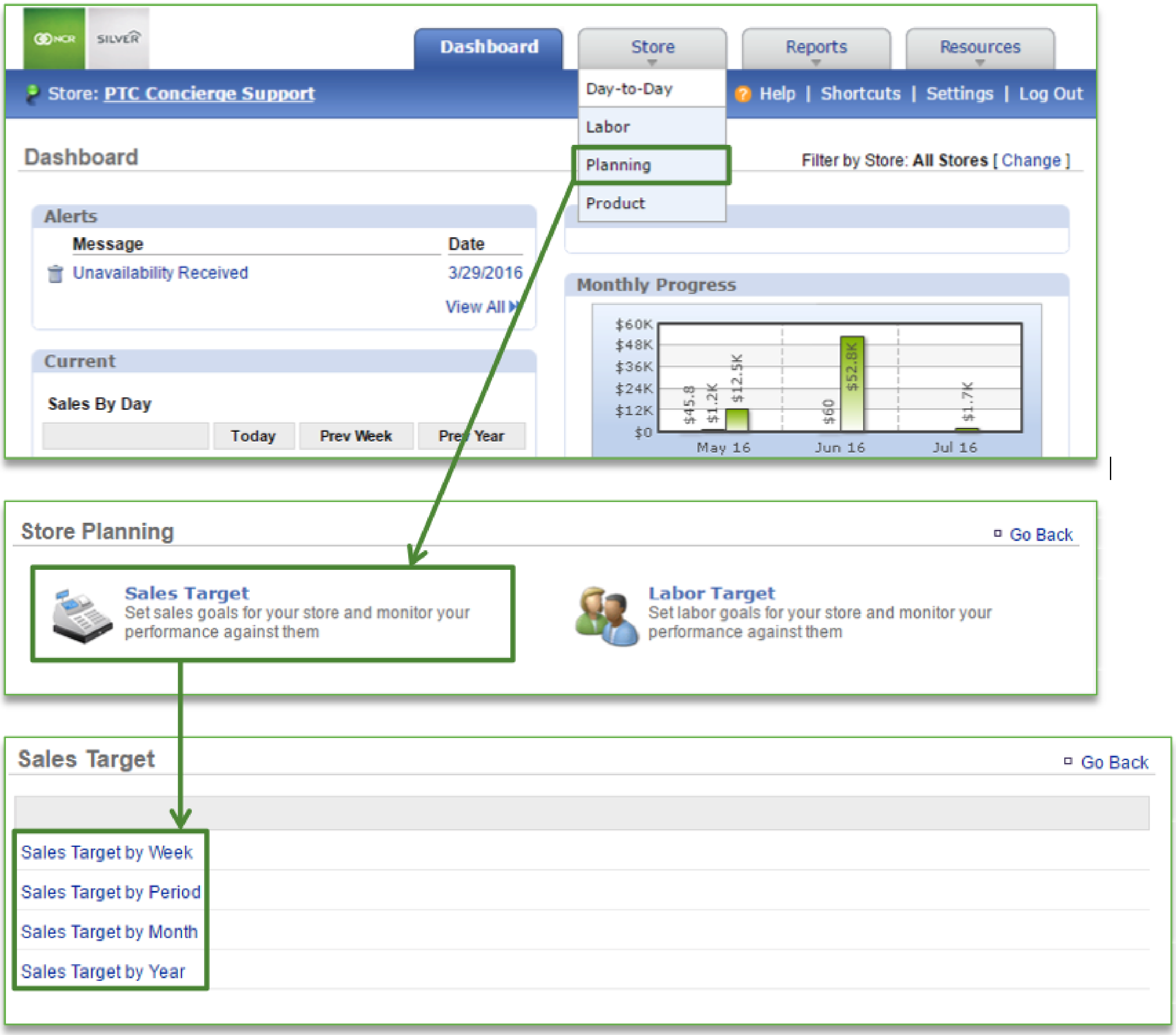
Set Sales Target

In this module, you will learn about:

- How to set a sales target by Week, Period, Month or Year

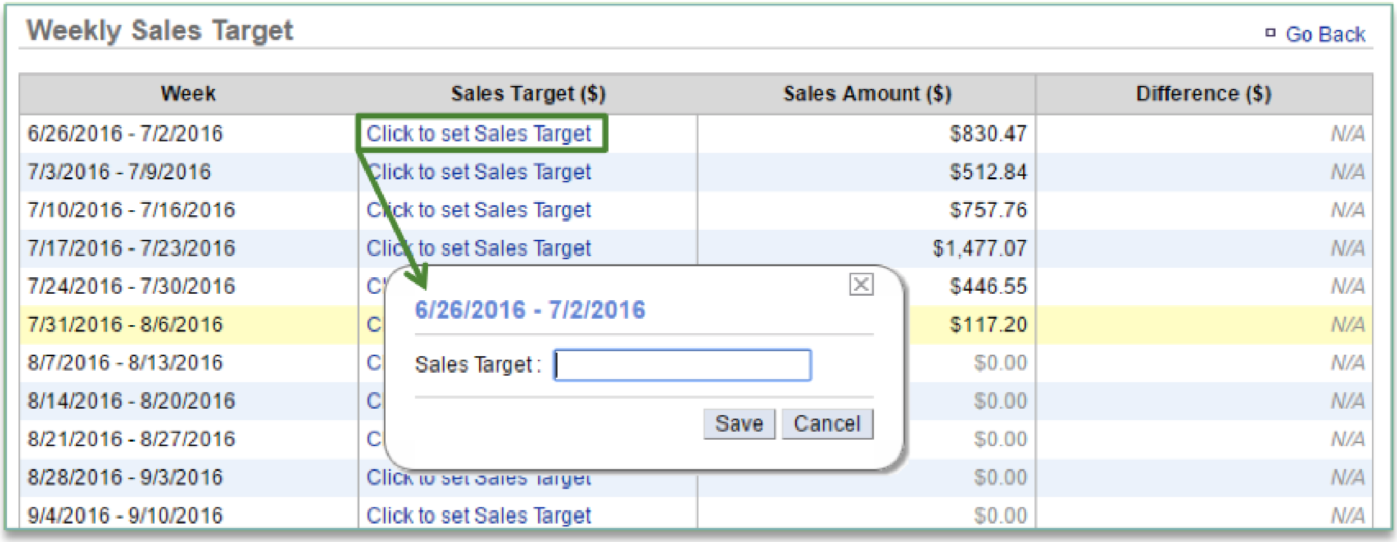
Setting Sales Goals

To set a sales goal you will need to navigate to the **Store Planning** module, click **Sales Target** and then select the target you wish to set.



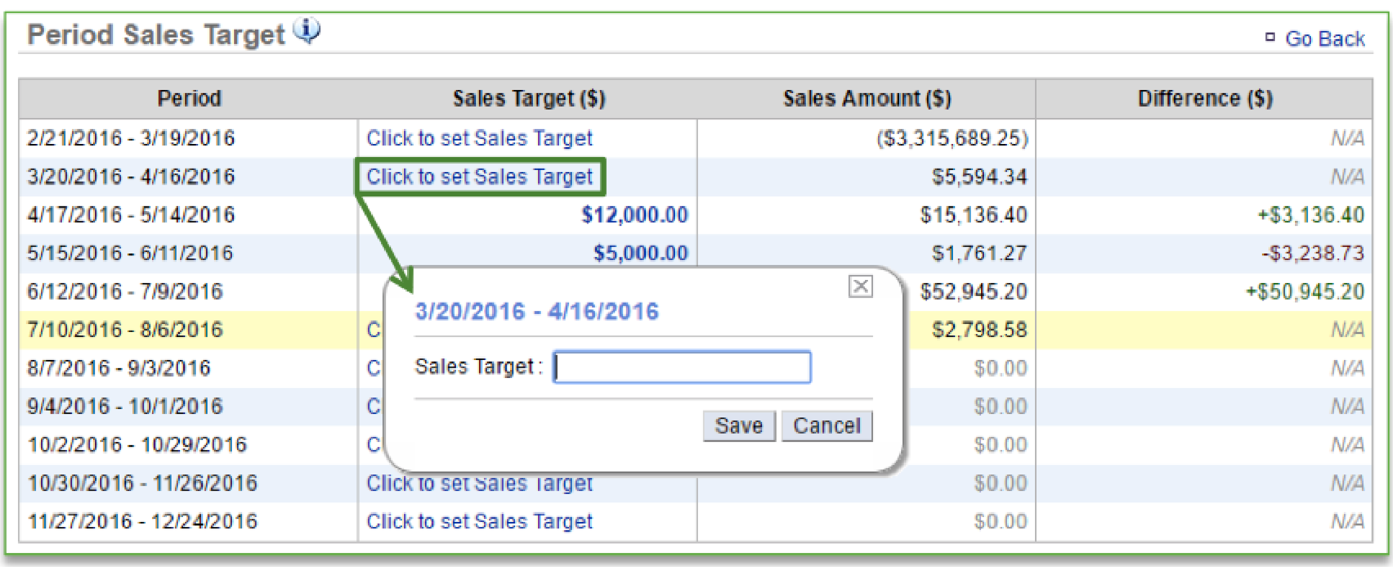
To Set a Sales Goal by Week

1. Select **Sales Target by Week** from the Sales Target screen
2. Select **Click to set Sales Target** for the week for which you wish to set a target
3. Enter the sales target and click **Save**



To Set a Sales Goal by Period

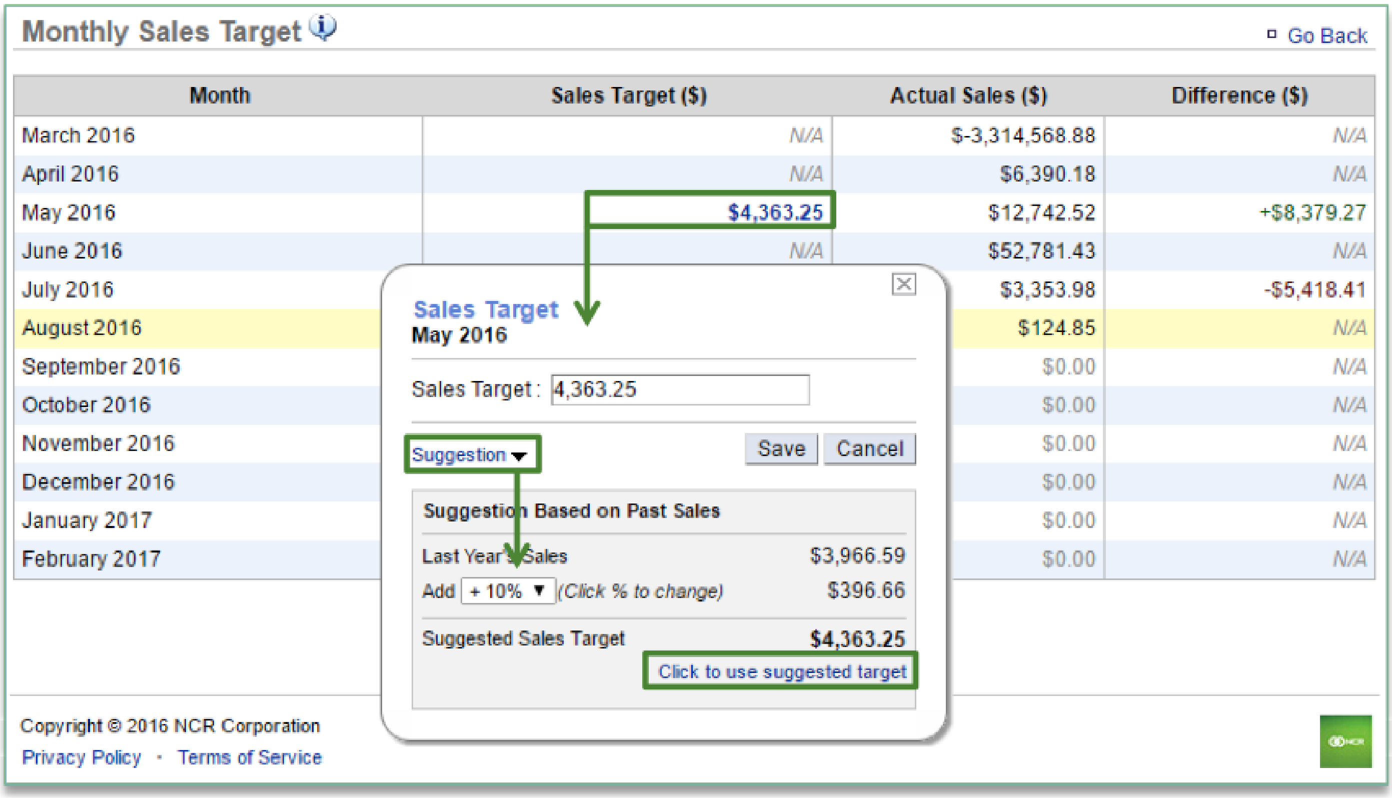
1. Select **Sales Target by Period** from the Sales Target screen
2. Select **Click to set Sales Target** for the period you wish to set a target for
3. Enter the sales target and click **Save**



To Set a Sales Goal by Month

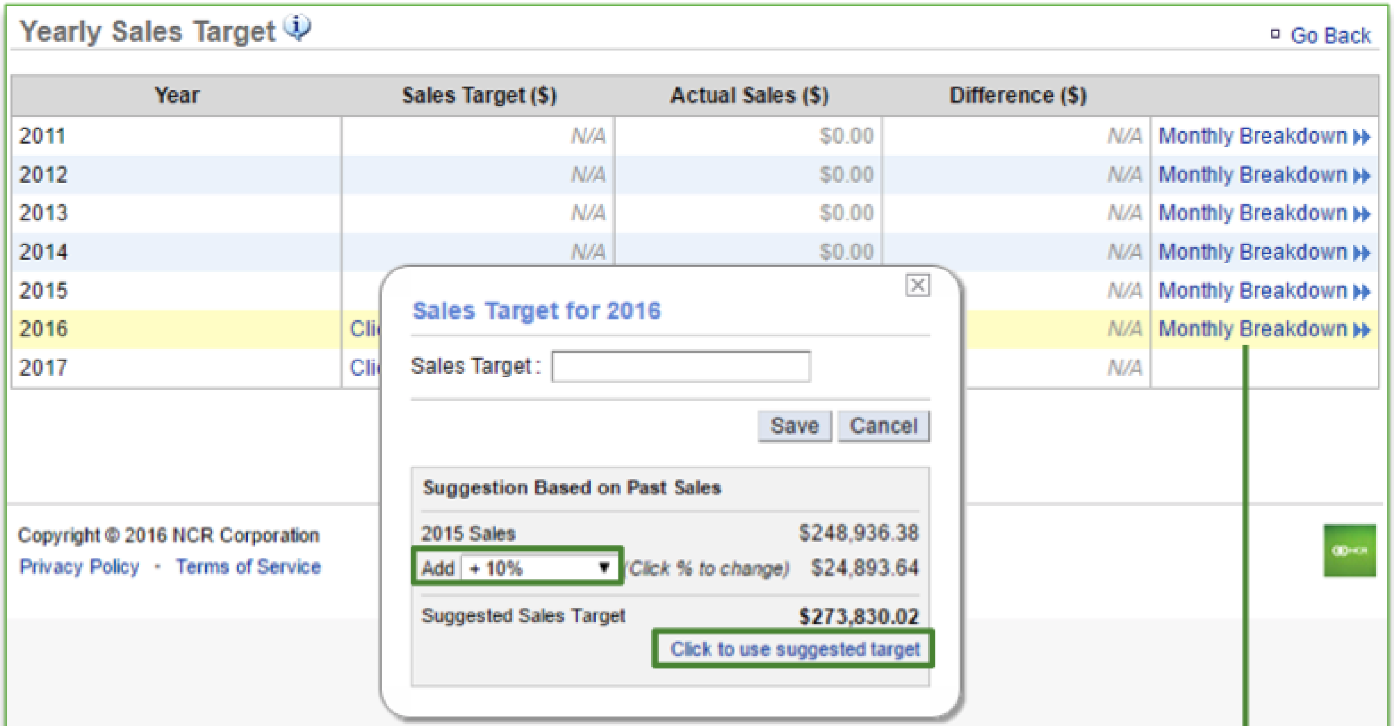
1. Select **Sales Target by Month** from the Sales Target screen
2. Select **Click to set Sales Target** for the week you wish to set a target for
   a. Enter the sales target in the open cell; **OR**

b. If you have prior year sales for the month you select, you have the option to select **Suggestion.** This will expand additional options
    i. Click the drop down arrow next to **Add** to select a percentage increase
    ii. Select **Click to use suggested target** to autofill the open cell
3. Click **Save**

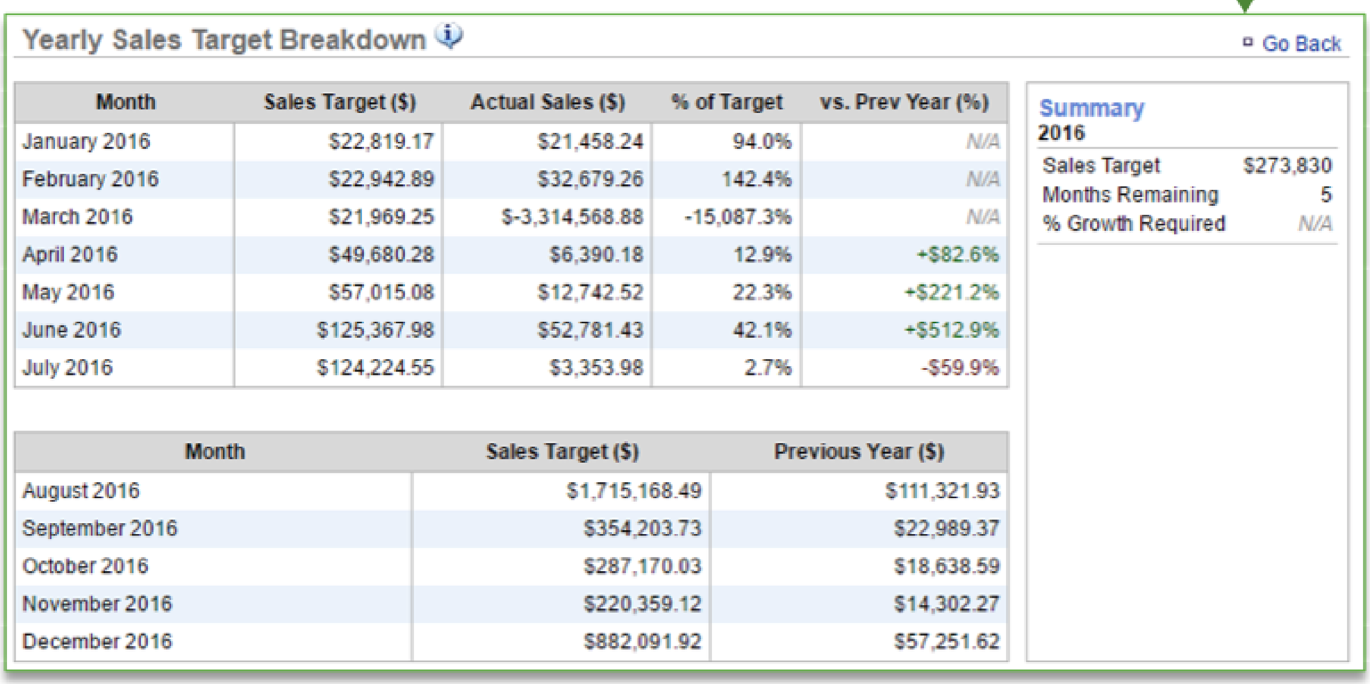


To Set a Sales Goal by Year

1. Select **Sales Target by Year** from the Sales Target screen
2. Select **Click to set Sales Target** for the year you wish to set a target for
    a. Enter the sales target in the open cell; **OR**
    b. If you have prior year sales for the year you select, you have the option to select **Suggestion**. This will expand additional options
        i. Click the drop down arrow next to **Add** to select a percentage increase
        ii. Select **Click to use suggested target** to autofill the open cell
3. Click **Save**
    a. Once a yearly goal has been set, you can view a per month breakdown by clicking **Monthly Breakdown** to the right of the year you want to view



Year	Sales Target ($)	Actual Sales ($)	Difference ($)	
2011	N/A	$0.00	N/A	Monthly Breakdown
2012	N/A	$0.00	N/A	Monthly Breakdown
2013	N/A	$0.00	N/A	Monthly Breakdown
2014	N/A	$0.00	N/A	Monthly Breakdown
2015			N/A	Monthly Breakdown
2016	Cli		N/A	Monthly Breakdown
2017	Cli		N/A	



Month	Sales Target ($)	Actual Sales ($)	% of Target	vs. Prev Year (%)
January 2016	$22,819.17	$21,458.24	94.0%	N/A
February 2016	$22,942.89	$32,679.26	142.4%	N/A
March 2016	$21,969.25	$-3,314,568.88	-15,087.3%	N/A
April 2016	$49,680.28	$6,390.18	12.9%	+$82.6%
May 2016	$57,015.08	$12,742.52	22.3%	+$221.2%
June 2016	$125,367.98	$52,781.43	42.1%	+$512.9%
July 2016	$124,224.55	$3,353.98	2.7%	-$59.9%

Month	Sales Target ($)	Previous Year ($)
August 2016	$1,715,168.49	$111,321.93
September 2016	$354,203.73	$22,989.37
October 2016	$287,170.03	$18,638.59
November 2016	$220,359.12	$14,302.27
December 2016	$882,091.92	$57,251.62

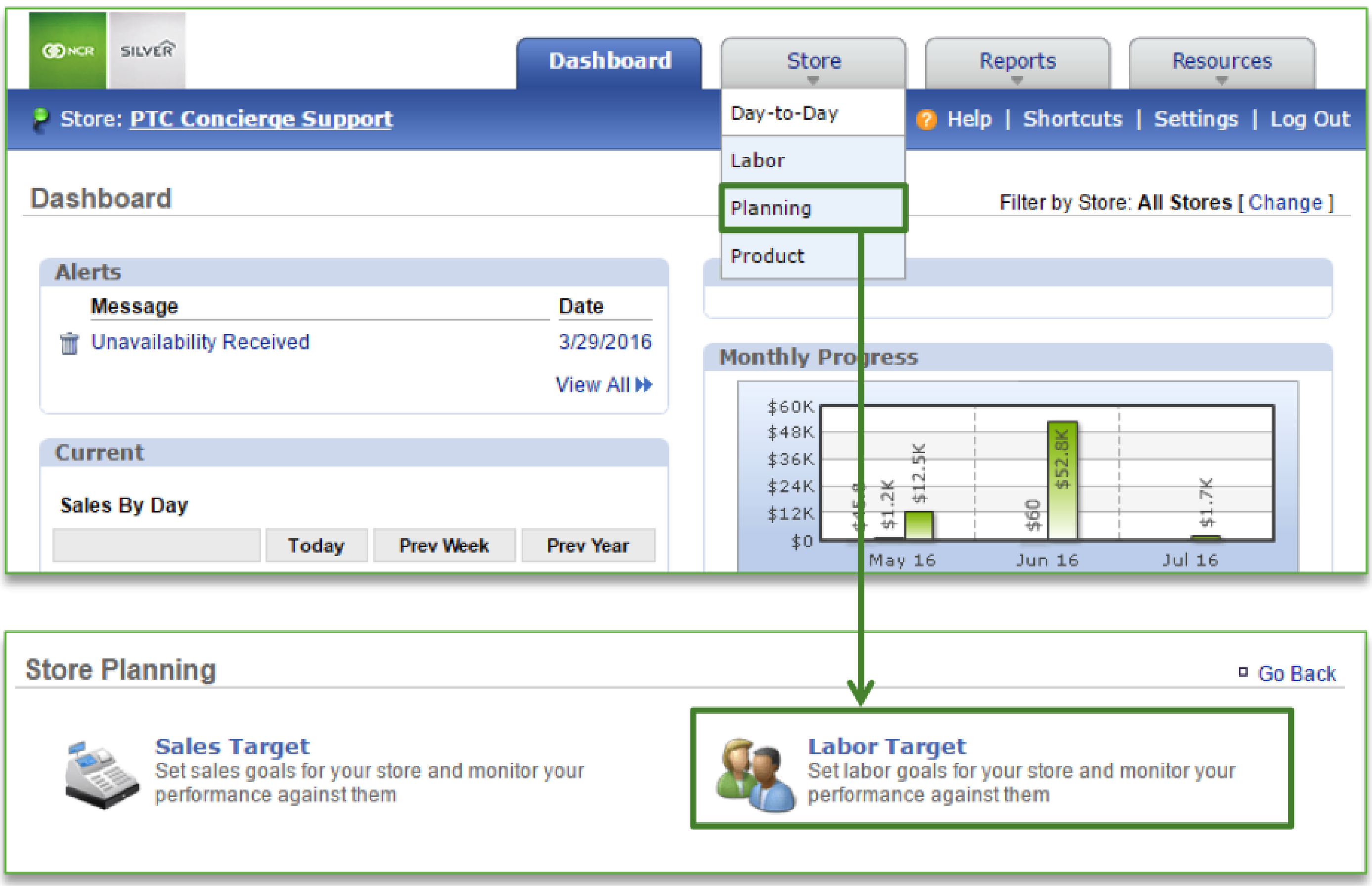
Set Labor Target

In this module, you will learn:

- How to set a labor target

Setting Labor Targets

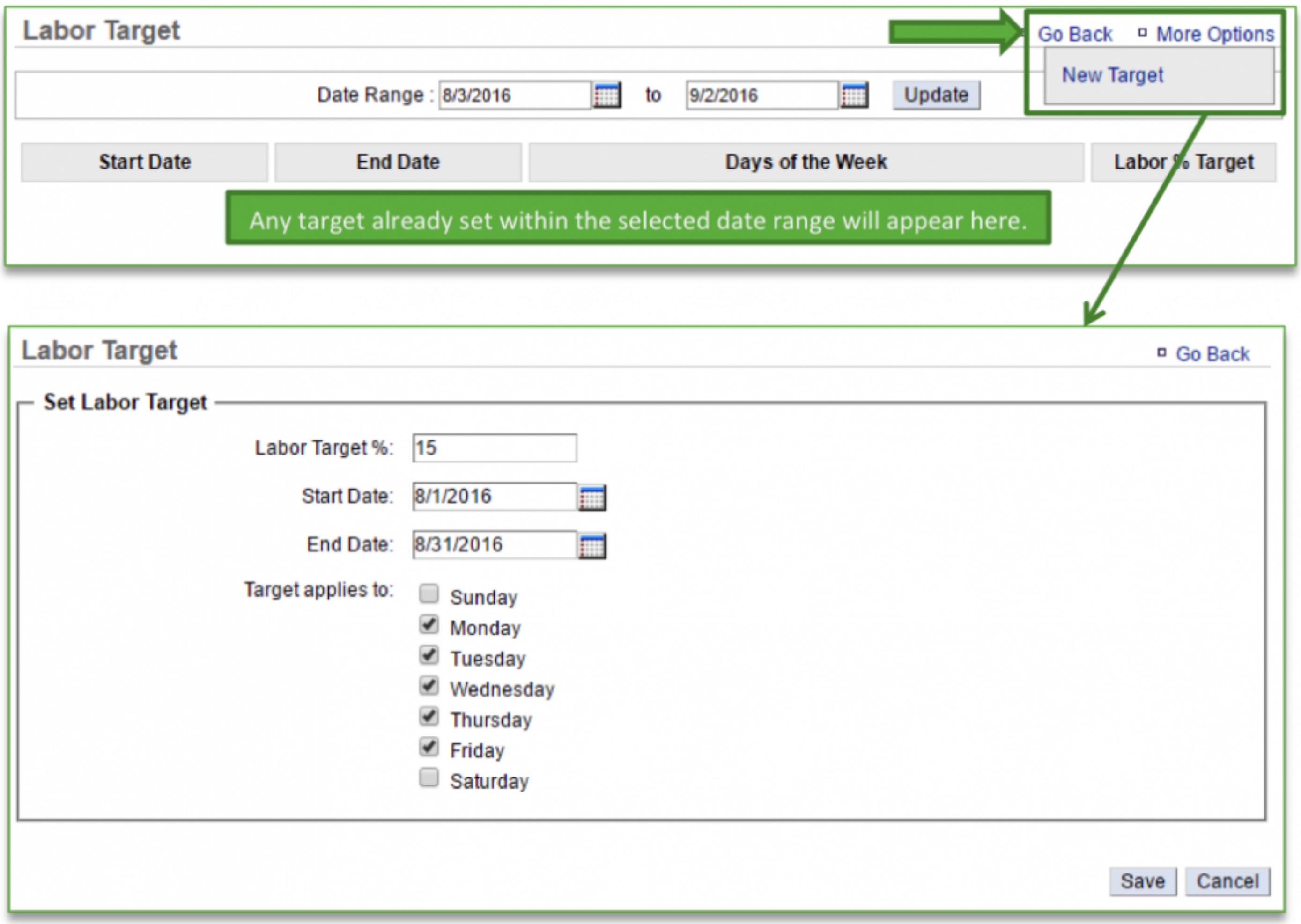
You will have the ability to set multiple labor targets and for any date range(s).
To set a labor target you will need to navigate to the **Store Planning** module and click **Labor Target**.



To Set a Labor Target

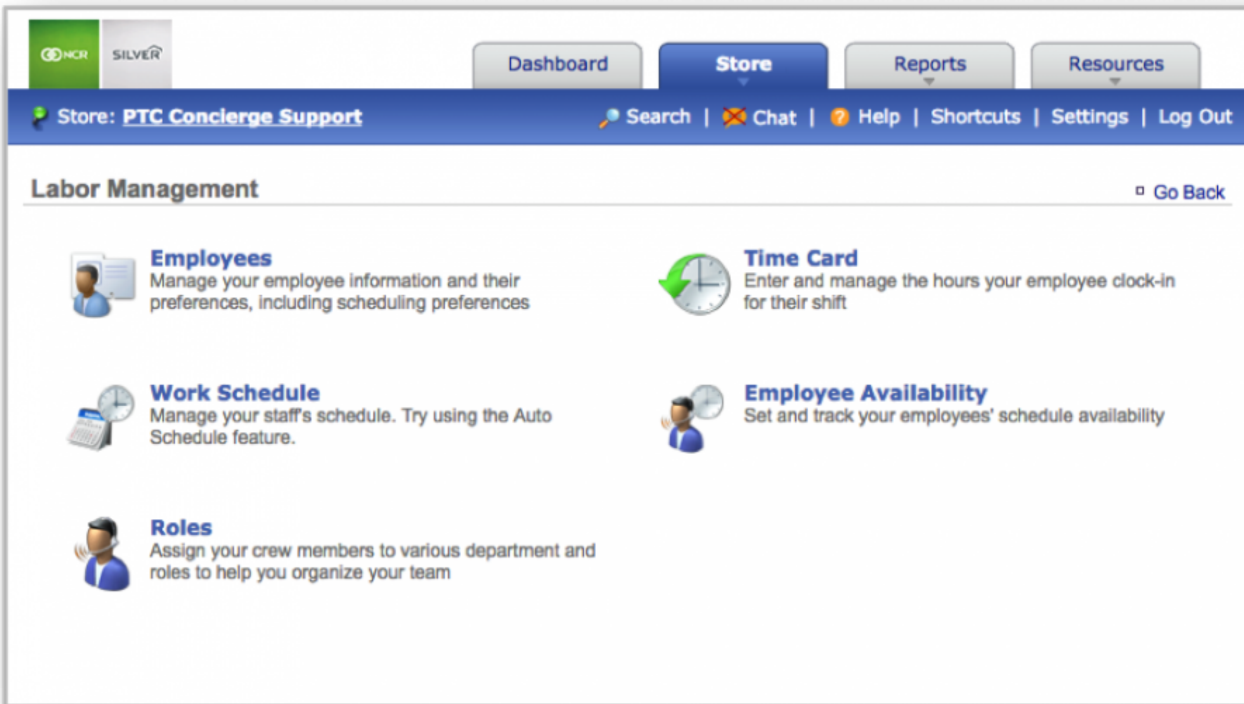
1. To set a target, click **More Options** and **New Target**
2. Enter the desired labor target percentage in the labor target cell

3. Select a start date and end date for the target
4. Click the days you wish to apply this target to
    a. You can set multiple targets over the same time period but for different days
5. Click **Save**



Labor Management

Effective labor management can help to reduce the overhead of daily administrative tasks by quickly managing your human resources needs, staff scheduling, labor tracking, payroll processing and integration through the NCR Console platform.



In this section you will find the following resources:

General

New Users: How to add new employees to the system.
Manage Existing Users: How to manage an existing employee.
Creating a new Department, Position or Task: How to create a new Department, Position or Task.
Employee Notes: How to add notes for an employee.
Additional Employee Information: How to input additional employee information, such as pay rate, start date, etc…
Roles & Responsibilities: How to manage Department, Position and Task categories.
User Permissions: How to adjust visibility permissions for your employees.

Employee Availability

Requesting Time Off: How employees request time off.

Managing Time Off Requests: How to manage time off requests.

Creating a Work Schedule

Creating a Work Schedule: How to create a work schedule.

Add Note for Current Week: How to add a note for the current work week.

Communicating Schedules: How to share work schedules with your team.

Time Card

Export a Time Card: How to export an employee's time card.

Import a Time Card: How to import an employee's time card.

Training

Employee Training: How to assign course work, certification tests and view progress.

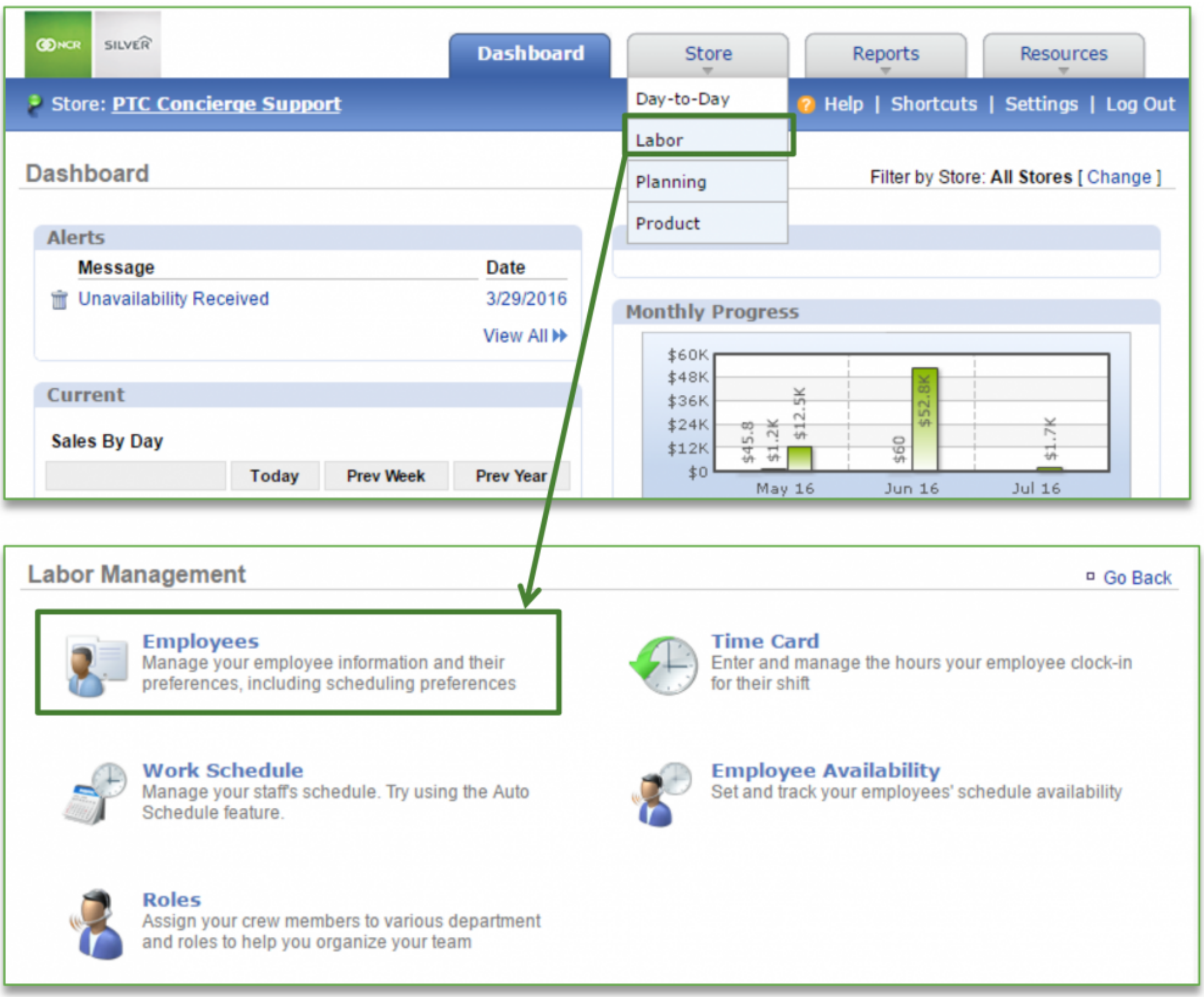
New User

In this module, you will learn:

- How to create new users (employees) in Console

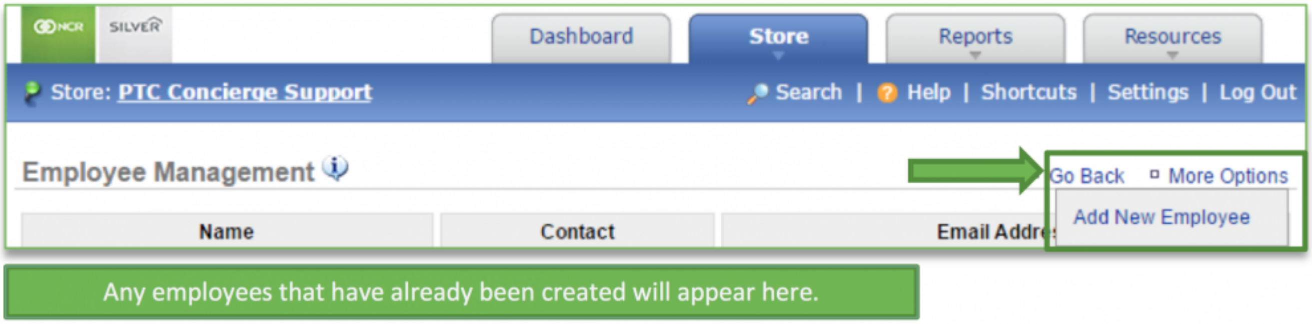
Creating New Users

To create a new user you will need to navigate to the **Labor Management** module and click **Employees**.

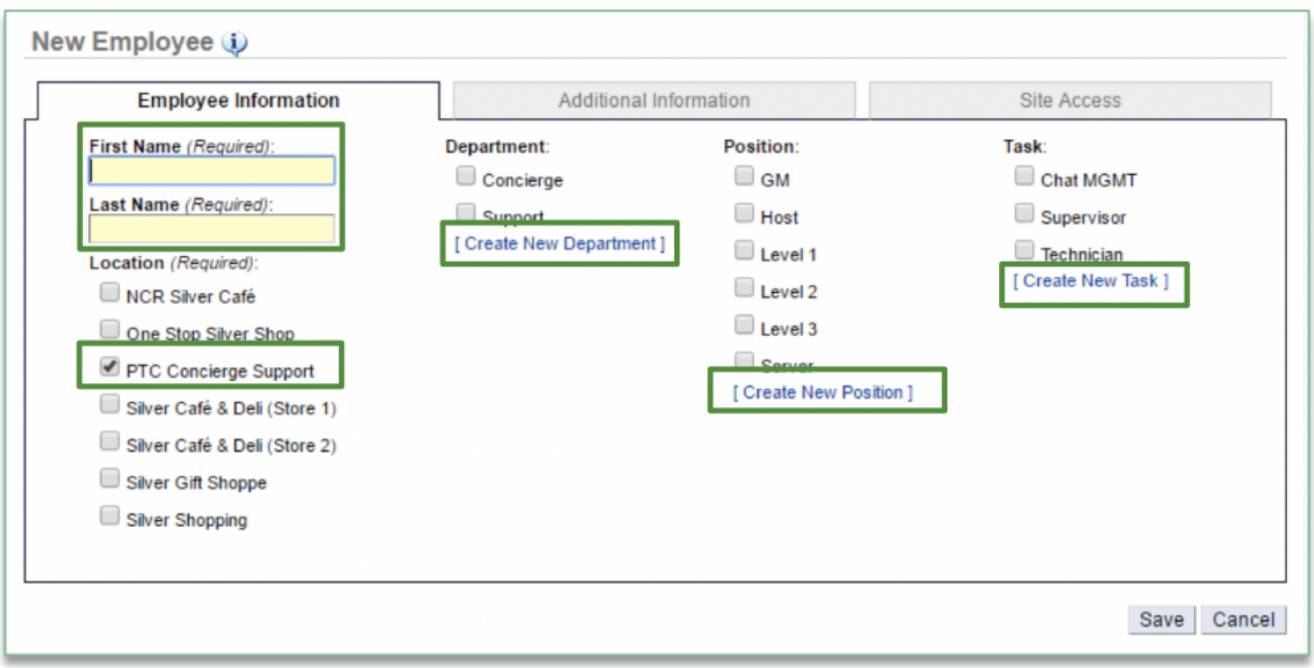


To Add a New User

1. Click **More Options**
2. Click **Add New Employee**



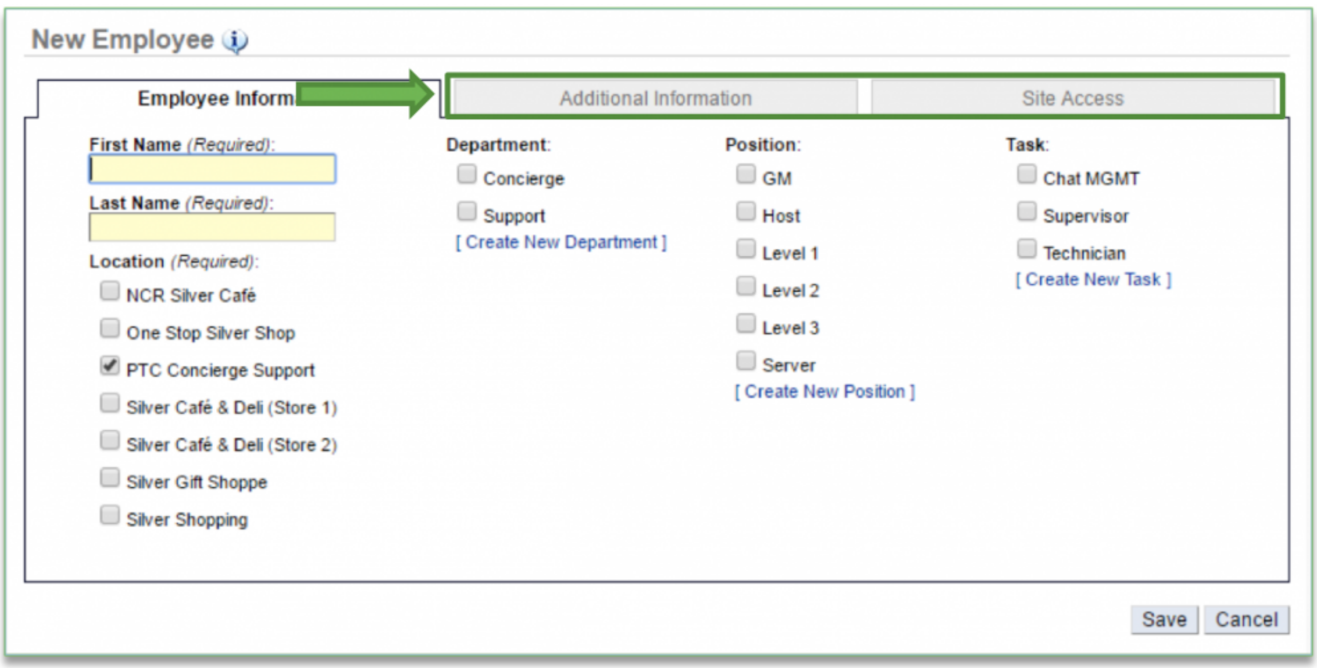
3. Enter the employee first and last name (these are required fields)
4. If you have multiple locations, select the location(s) that the employee should be assigned to
5. If you have created Departments, Positions and Tasks, select the Departments, Positions and Tasks that you wish to assign to the employee
   a. You will be able to create new Departments, Positions and Tasks from this screen. See the **Creating Roles training module** for more detailed information
6. Click **Save**



NOTE: You can modify employee information at any time after creating them in Console. Refer to the **Managing Existing Users training module** for more detailed information.

There are two additional tabs within the employee record (**Additional Information** and **Site Access**).

- *Additional Information*: Allows you to enter additional details such as email, phone number, pay rate, start date, etc… which supports the communication of schedules and the reporting of labor costs.
- *Site Access*: Allows you to provide limited or full access to the store management portal (store.cimplebox.com) and/or access to the employee portal (employee.cimplebox.com)
  Refer to the **Additional Employee Information training module** and the **User Permissions training module** for more detailed information.



Click here for more information about creating a new Department, Position or Task.

Related Topics:

Managing Existing Users

Inactivate an Employee

Delete an Employee

Creating a new Department, Position or Task: How to create a new Department, Position or Task.

Importing Employee Information via the Unrecognized Clock-In Alert

Adding Employee Notes

Adding Additional Employee Information

Roles & Responsibilities
Adjusting or Setting User Permissions

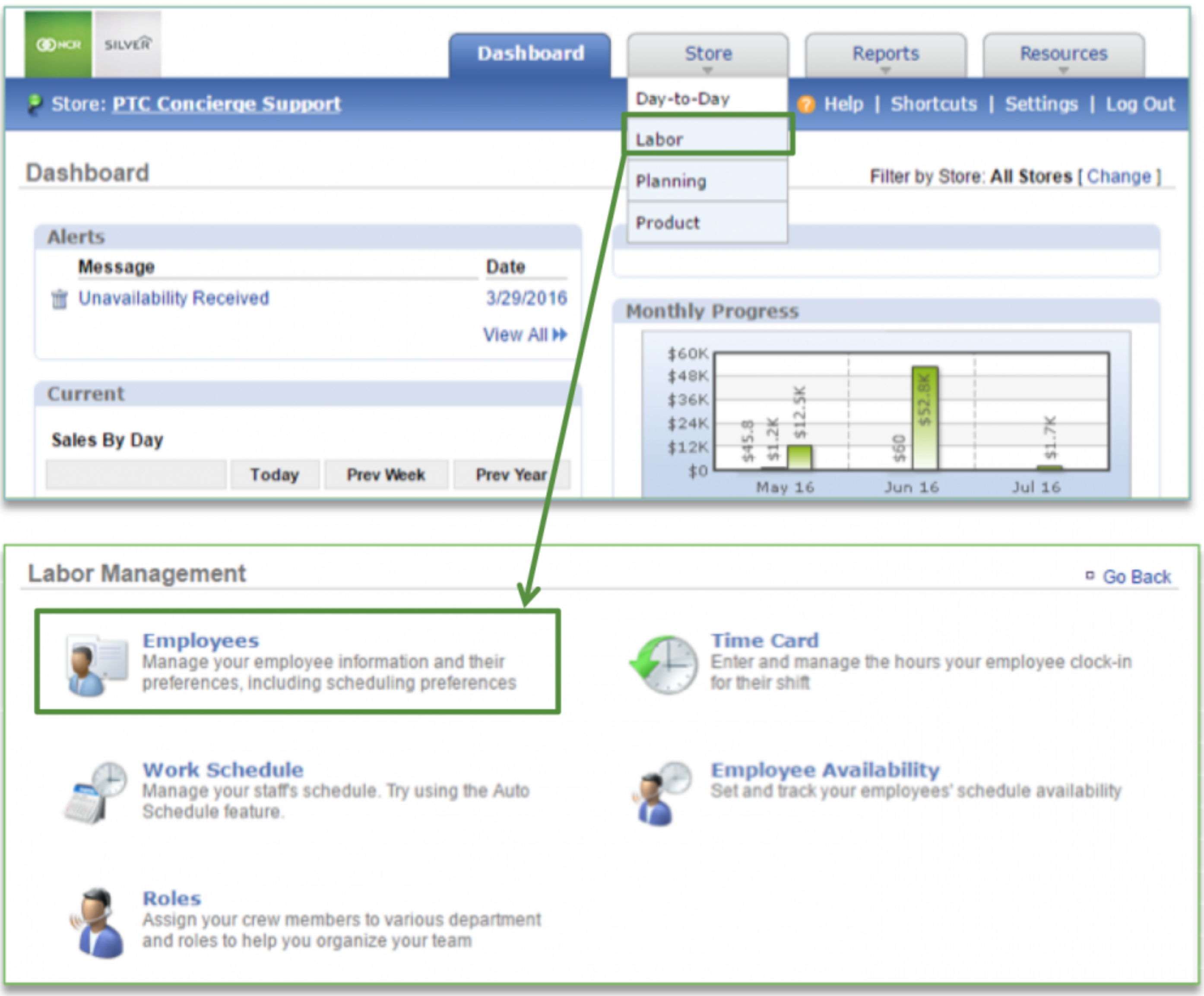
Existing Users

In this module, you will learn about:

- How to manage existing employee information

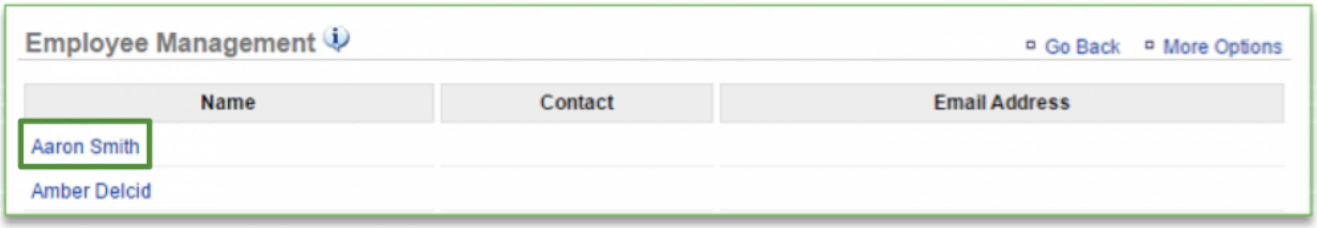
Managing Existing Employee Information

To manage existing employee information you will need to navigate to the **Labor Management** module and click **Employees**.

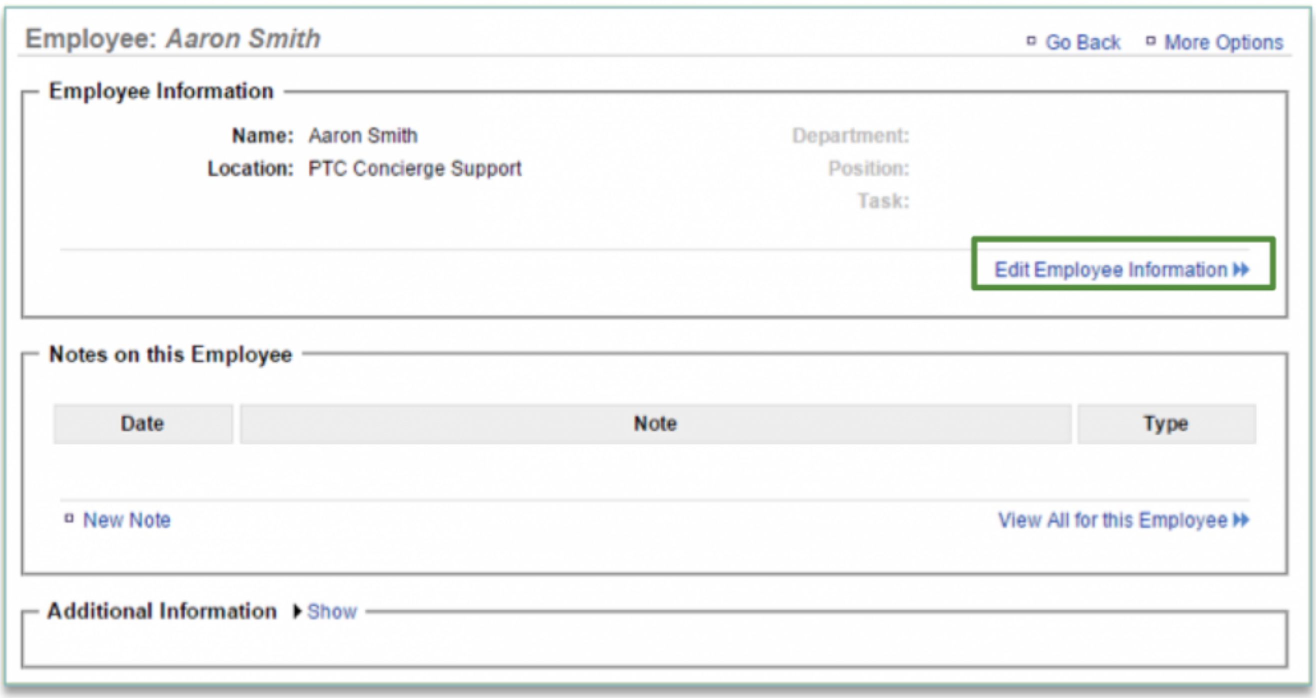


To Edit Employee Information

1. Select the employee you wish to edit information for

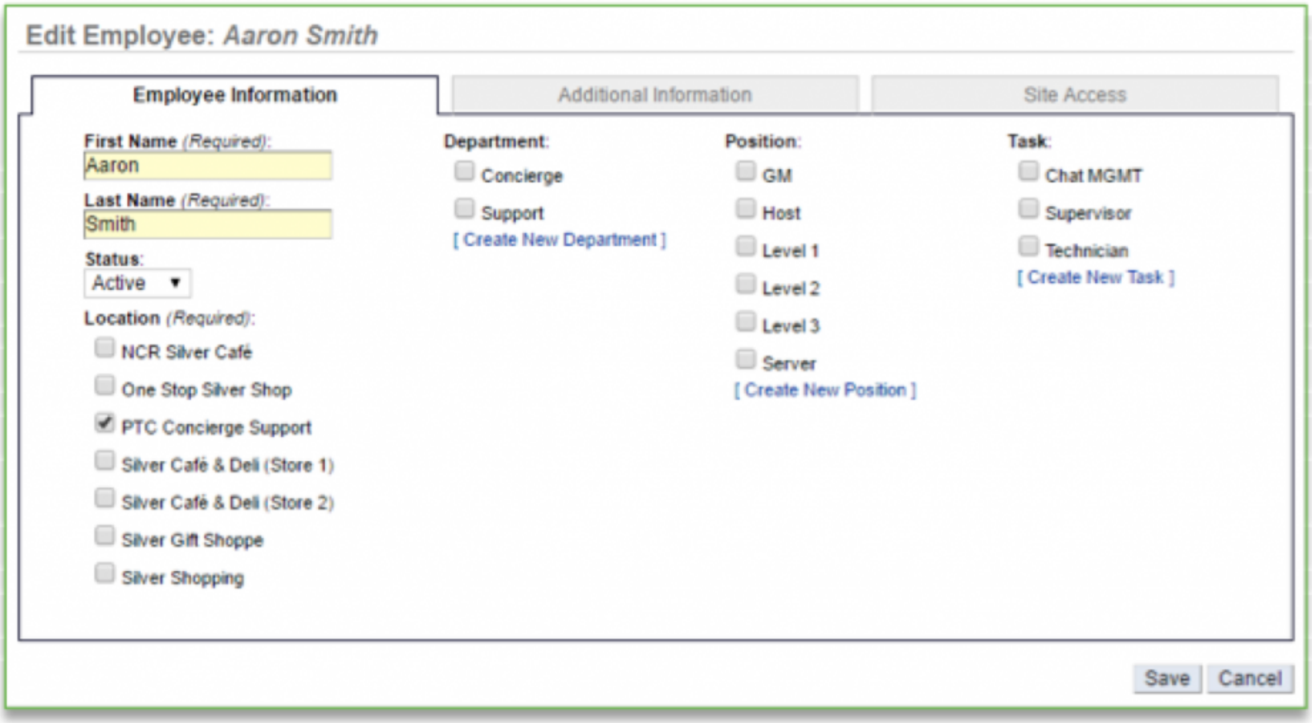


2. Click **Edit Employee Information**



3. Make the adjustments you need to make throughout the employee record

4. Click **Save**



[Click here](#) for more information about creating new Departments, Positions, and Tasks.

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Inactivate an Employee

In this module, you will learn:

- The purpose of inactivating employees
- How to inactivate employees

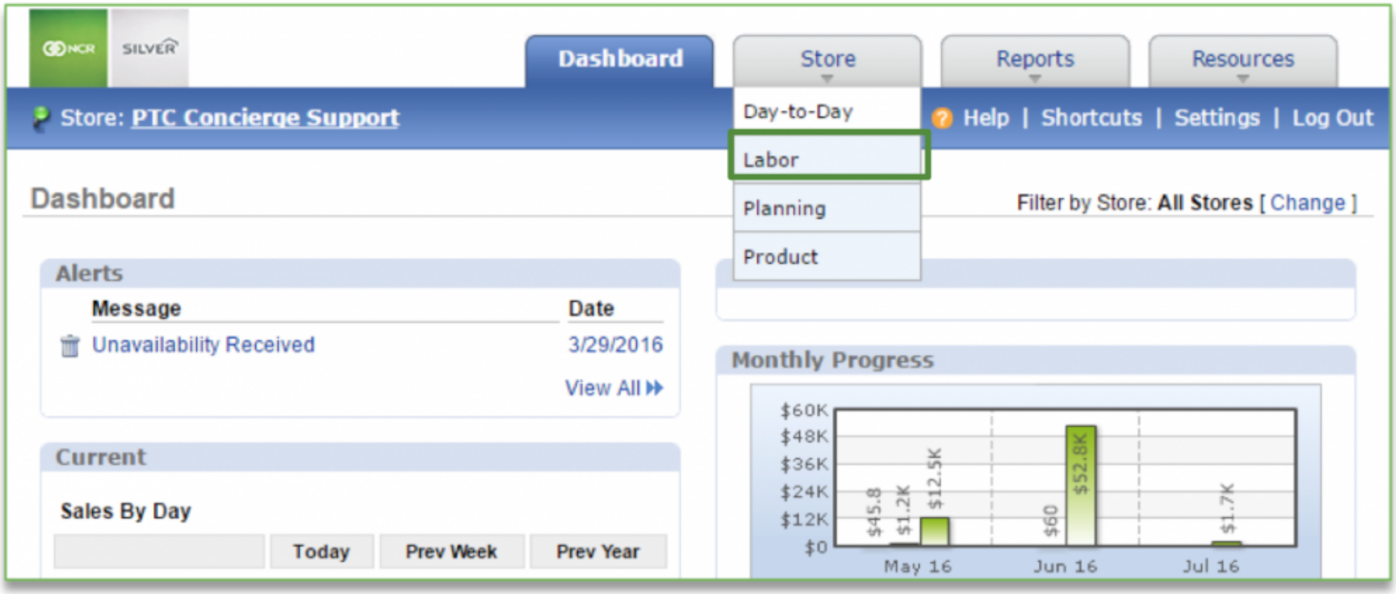
The Purpose of Inactivating Employees

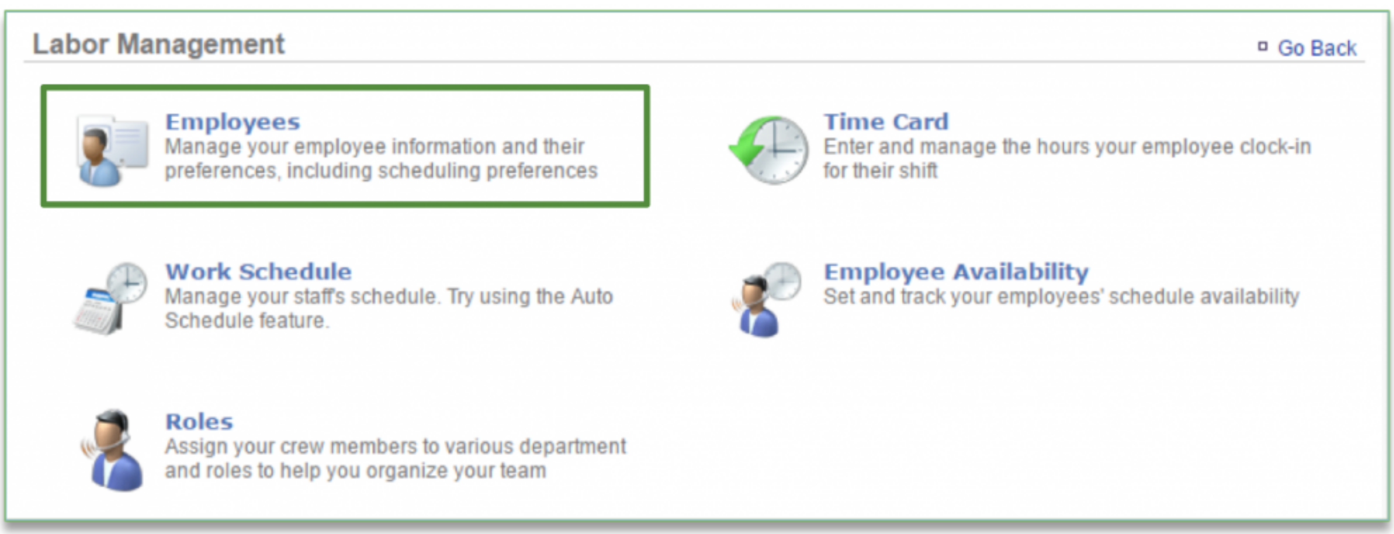
You can inactivate an employee at any time. Inactivating an employee will remove them from the work schedule, employee availability schedule, time card view and all labor reports. However, you will still have access to the employee's information and historical data.
There are two reasons you may choose to inactivate an employee:

1. They have been terminated
2. They do not work in your location but support your business and therefore need access to your account(s)
    a. Inactive employees can still access their Console account, if one has been created for them. You can modify or remove access at any time. See the **User Permissions** training module for more information.

Inactivating an Employee

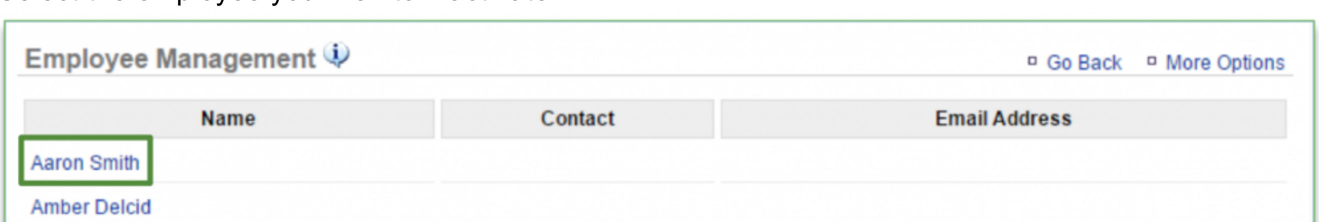
To inactivate an employee, you will need to navigate to the **Labor Management** module and click **Employees**.



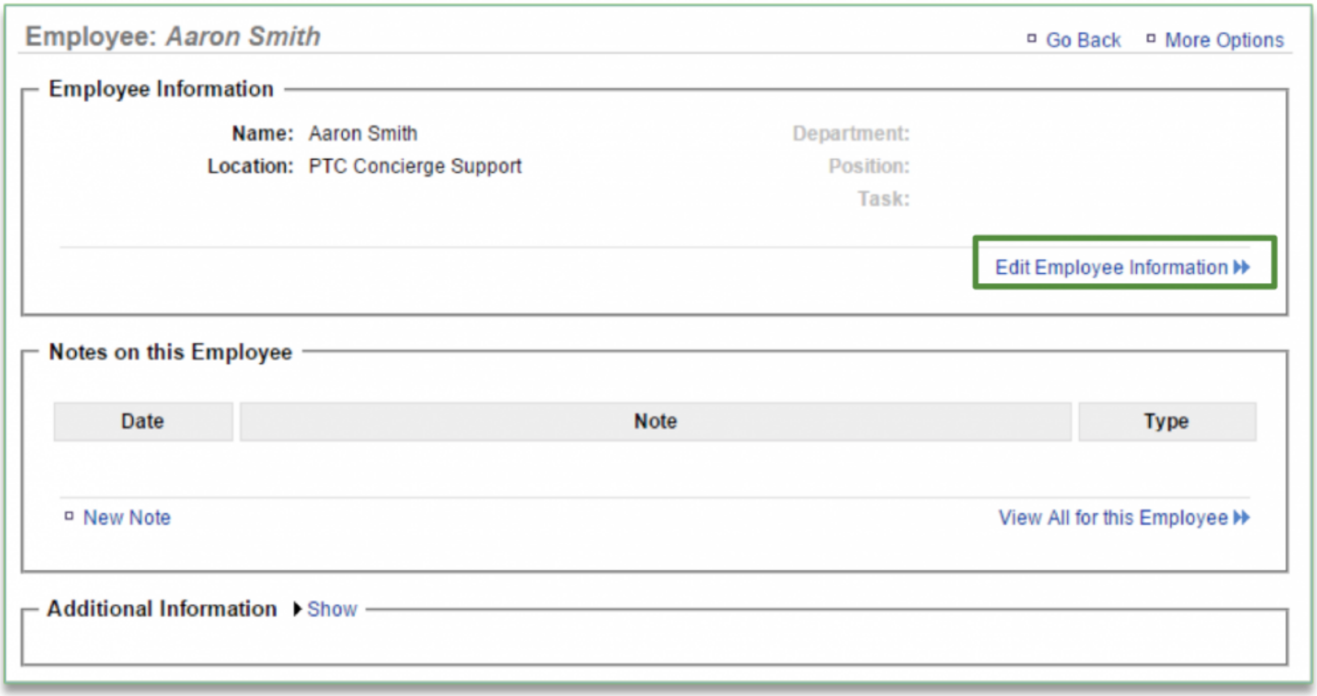


To Add a New User

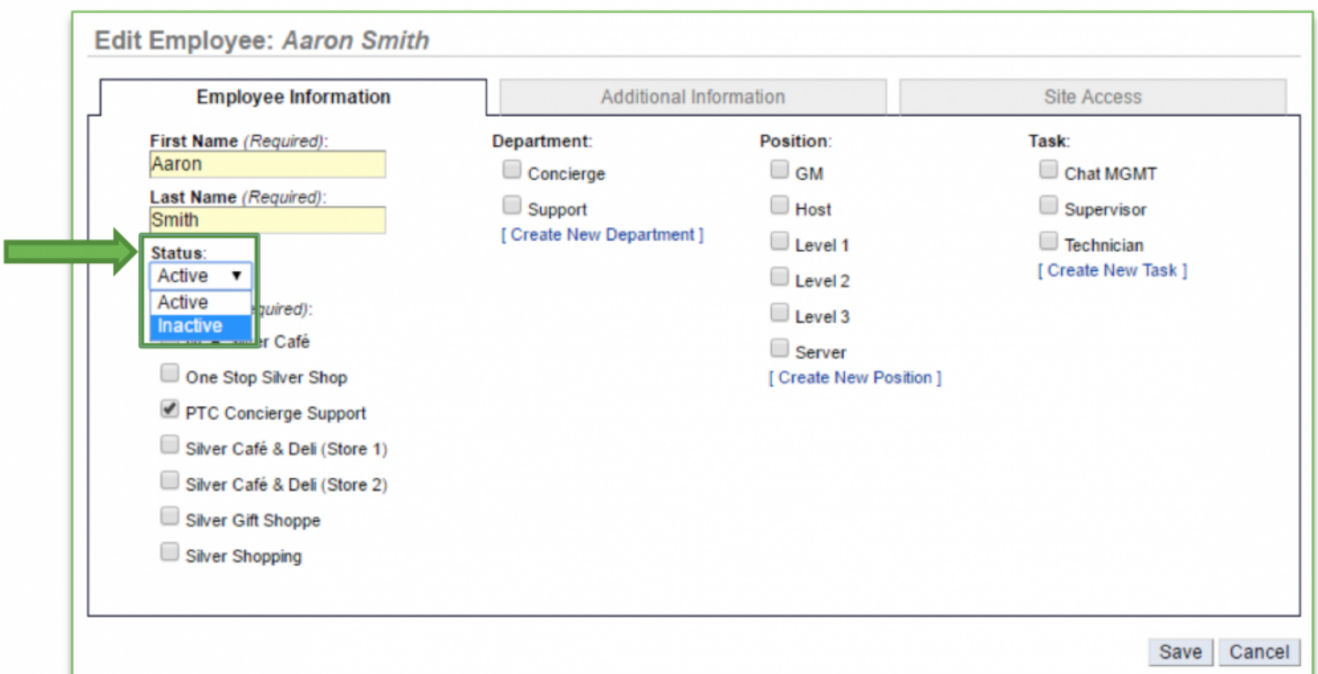
1. Select the employee you wish to inactivate



2. Click **Edit Employee Information**



3. Click the dropdown arrow under **Status**
4. Select **Inactive**
5. Click **Save**



Related Topics:

Managing Existing Users
Delete an Employee
Creating a new Department, Position or Task: How to create a new Department, Position or Task.
Importing Employee Information via the Unrecognized Clock-In Alert
Adding Employee Notes
Adding Additional Employee Information
Roles & Responsibilities
Adjusting or Setting User Permissions

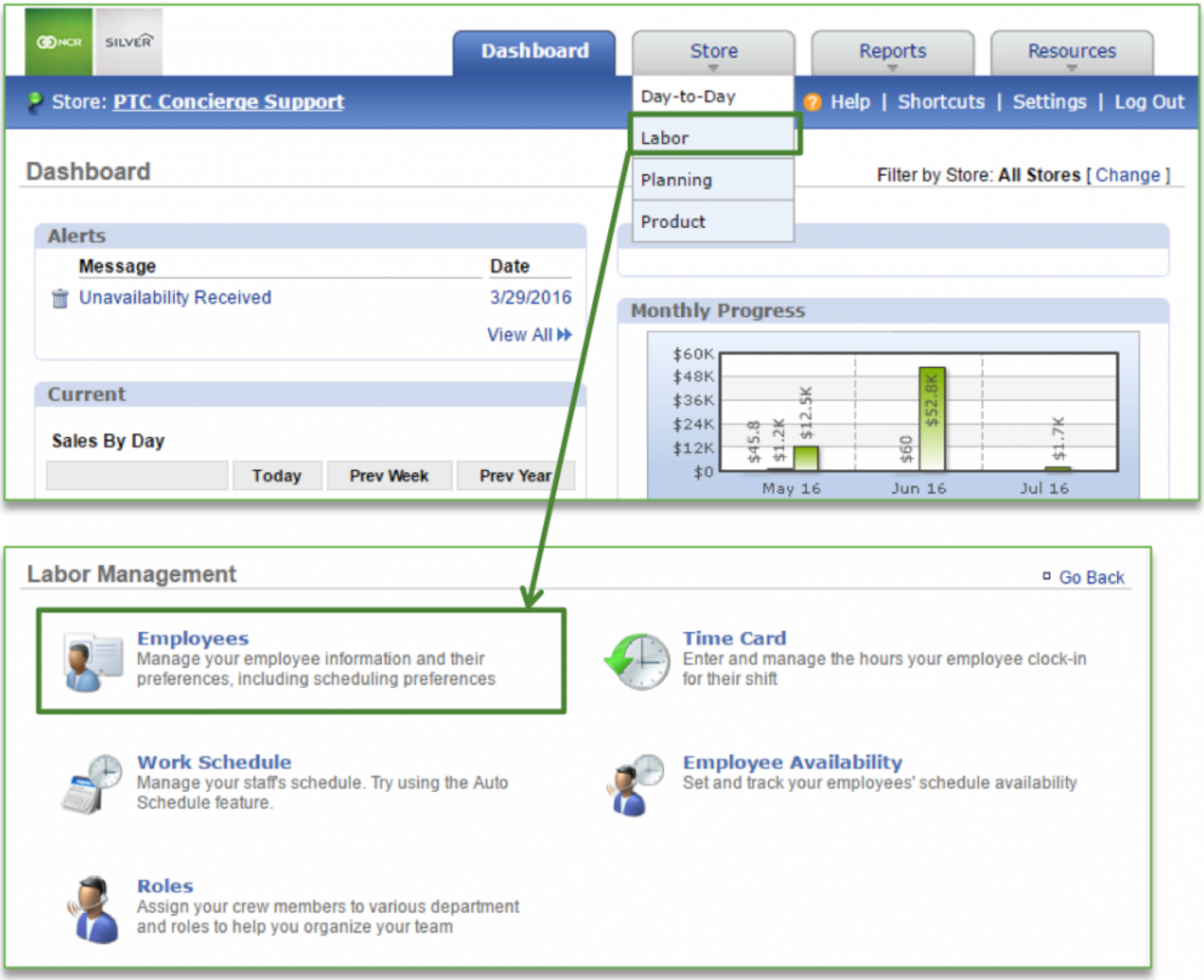
Delete an Employee

In this module, you will learn:

- How to delete an employee record

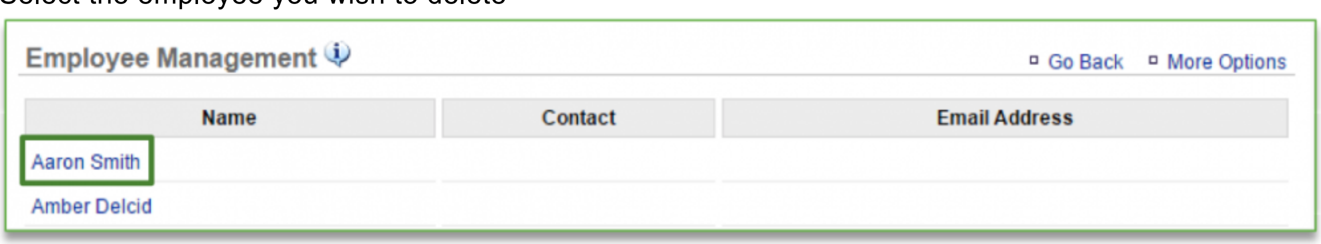
Deleting an Employee

You can delete an employee at any time. Keep in mind that deleting an employee will completely remove them from the system. Any historical information as it pertains to the employee's work schedule, employee availability, and select labor reports will be lost once they have been deleted.
However, you will still have access to historical sales data as it pertains to the employee even after they have been removed from the system.
To delete an employee, you will need to navigate to the **Labor Management** module and click **Employees**.



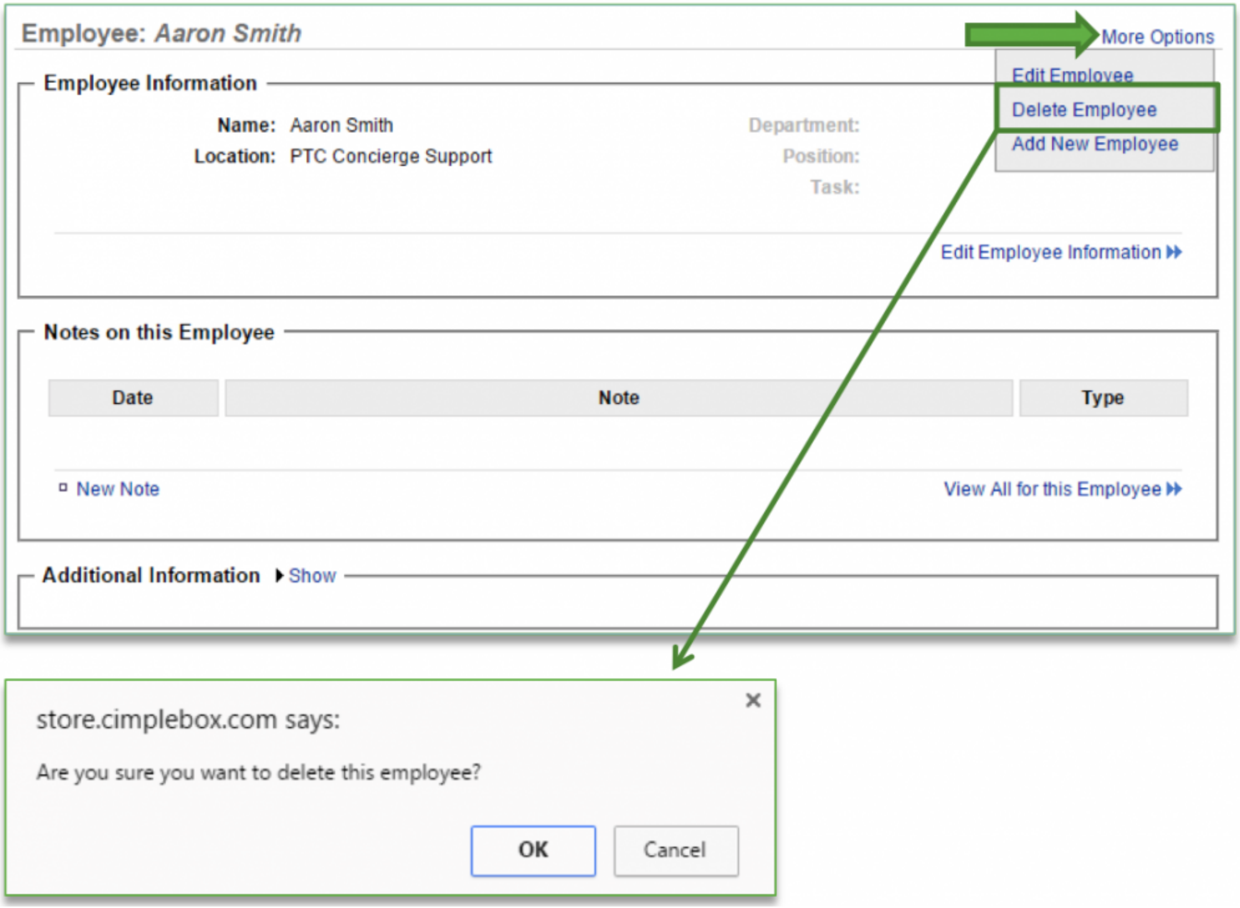
To Delete an Employee

1. Select the employee you wish to delete



2. Click **More Options**
3. Click **Delete Employee**
   a. You will be asked to confirm your choice

b. Click **OK**



Related Topics:

Managing Existing Users

Inactivate an Employee

Creating a new Department, Position or Task: How to create a new Department, Position or Task.

Importing Employee Information via the Unrecognized Clock-In Alert

Adding Employee Notes

Adding Additional Employee Information

Roles & Responsibilities

Adjusting or Setting User Permissions

New Dept., Position or Task

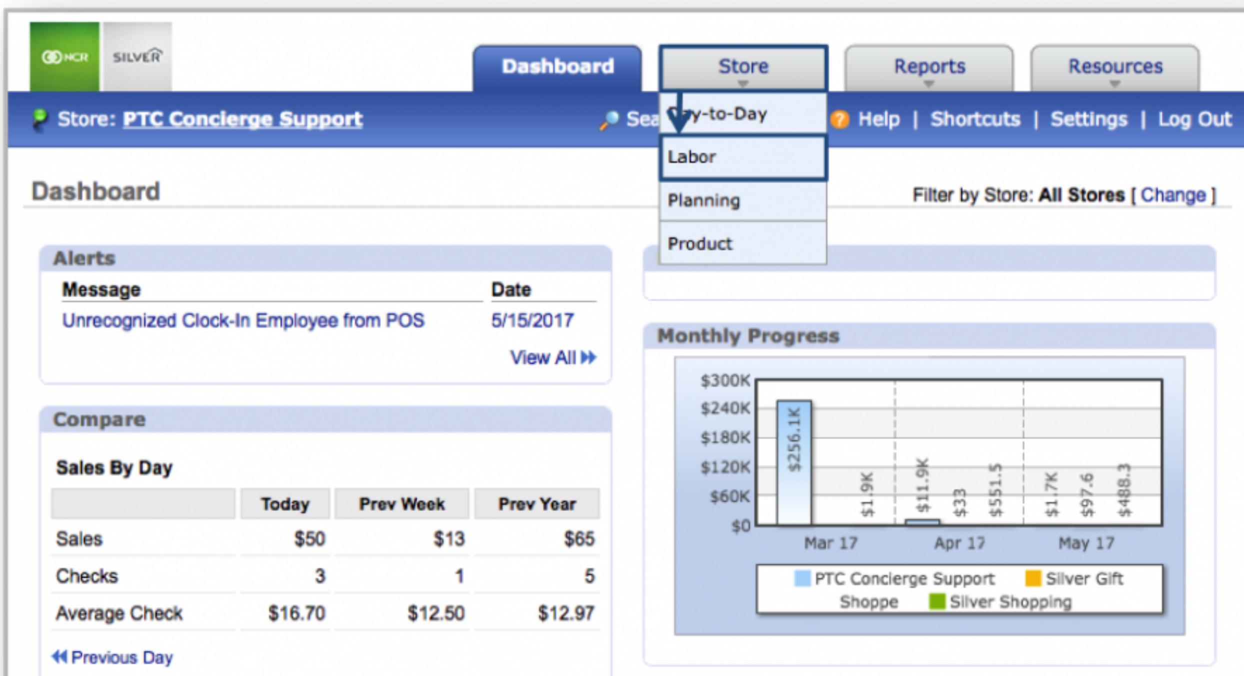
The purpose of this section is to illustrate how to create new Departments, Positions or Tasks.

Creating a New Department, Position or Task

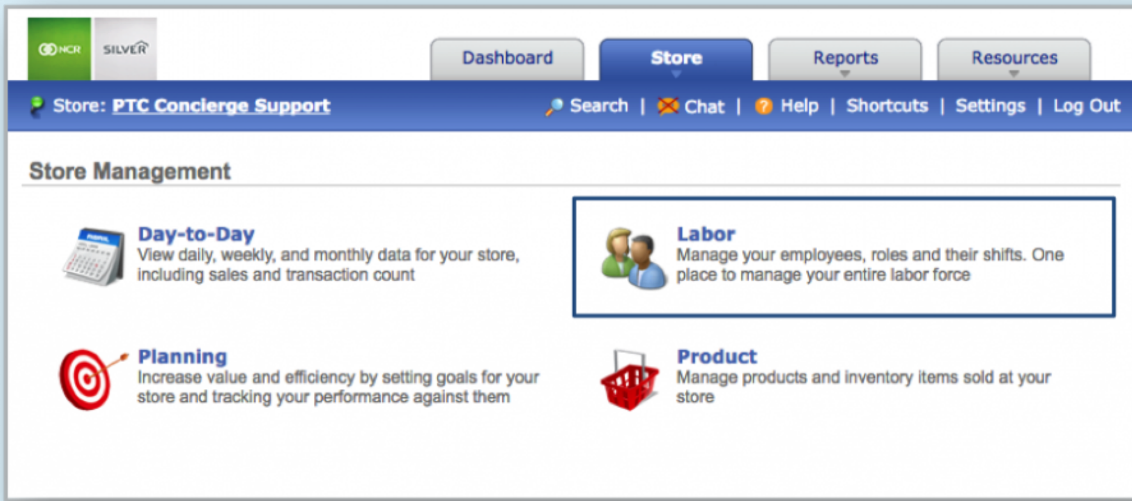
There are two ways to create a new *Department, Position or Task*. You can create one by editing an employee's file or by accessing *Roles & Responsibilities* within the Labor section of the site.

Creating a *New Department, Position or Task,* via the Roles & Responsibilities platform.

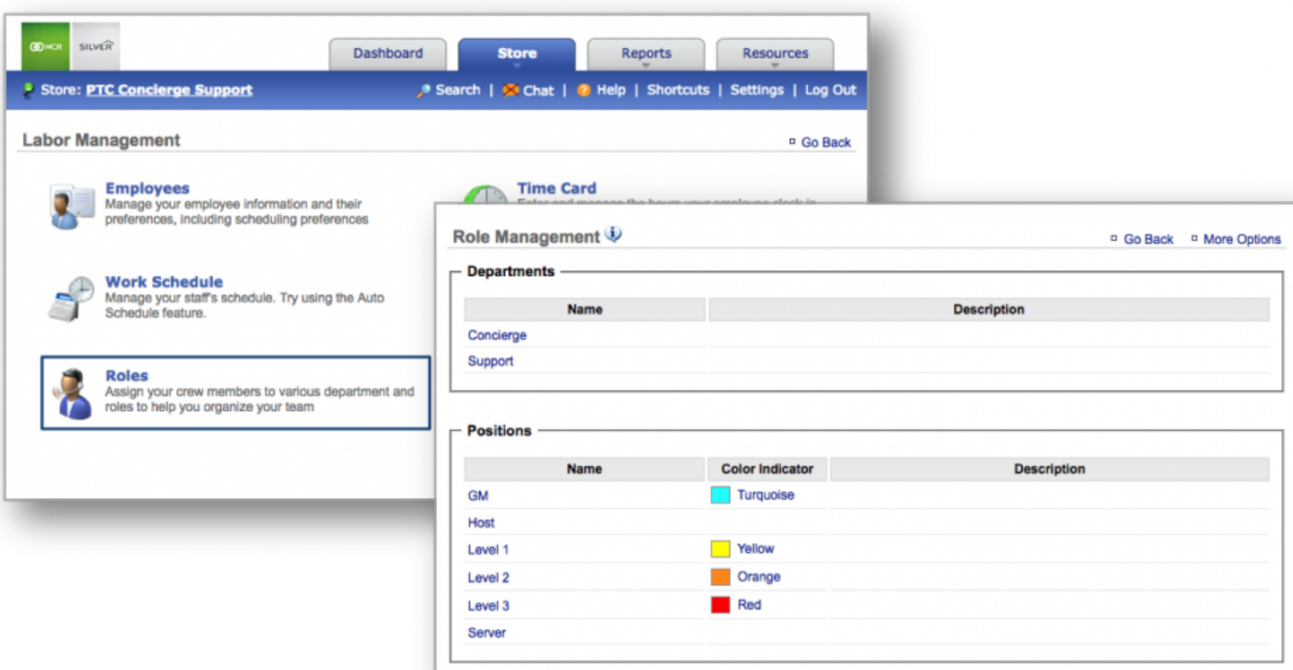
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Labor***.



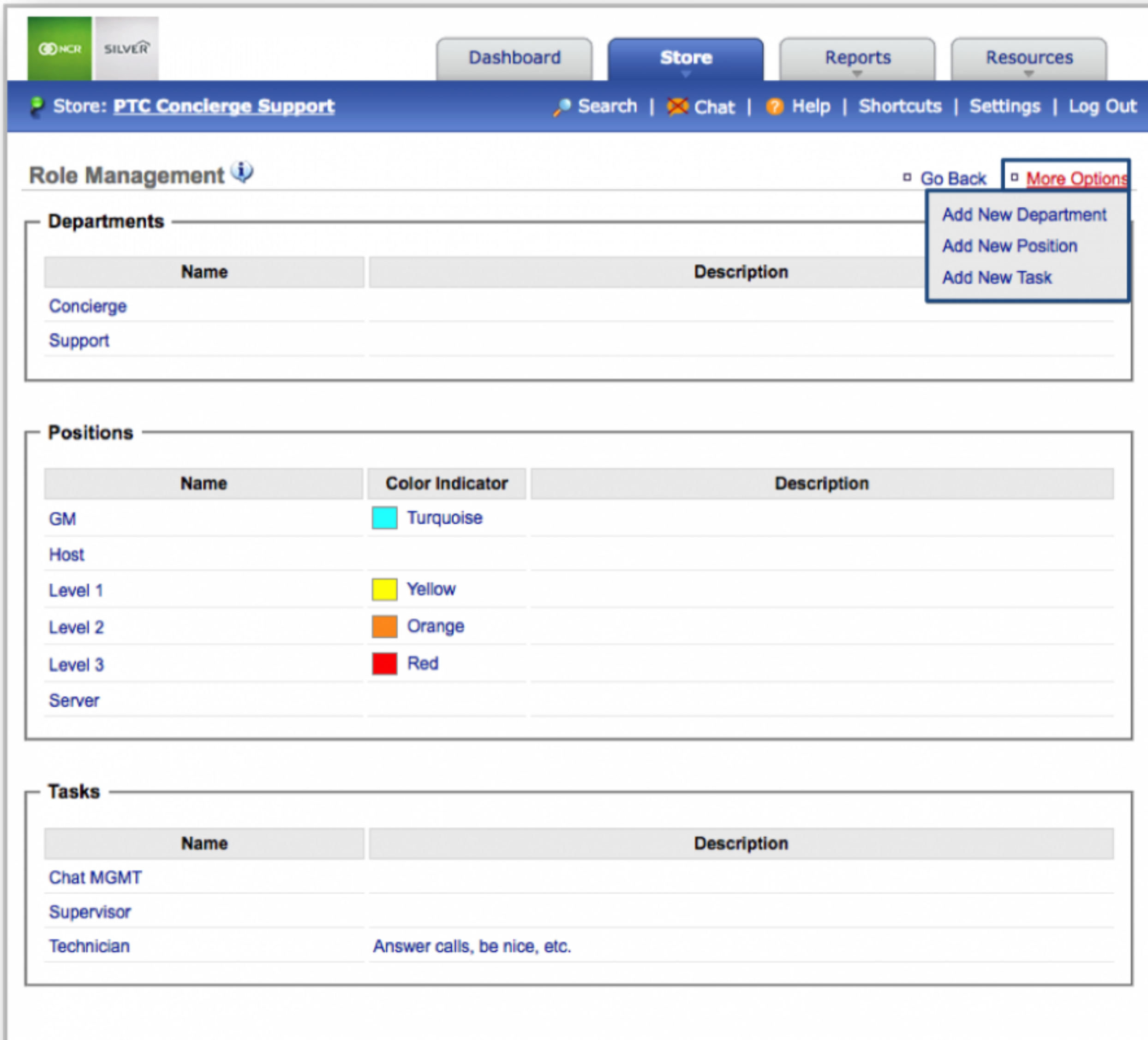
Hint: You can also access Labor by clicking on the ***Store*** tab and then on ***Labor*** from the Store Management screen.



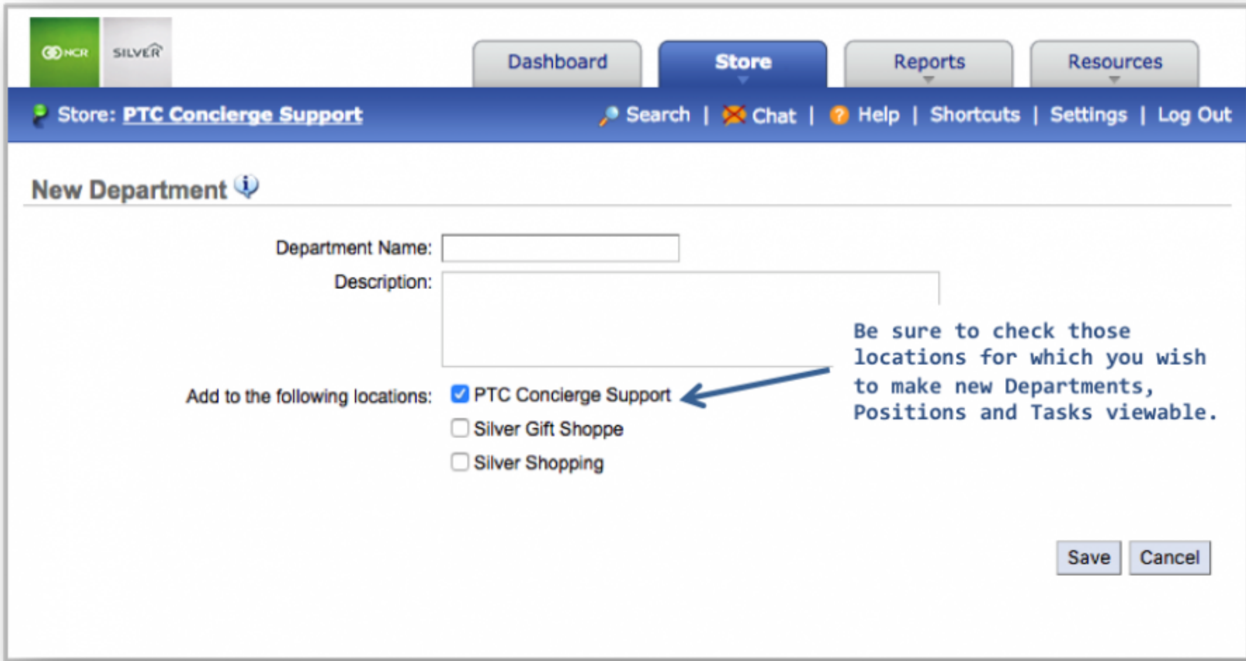
STEP 2: From the Labor Management screen, click ***Roles***, which will take you to the Role Management page.



STEP 3: To create a *New Department, Position or Task,* click ***More Options*** at the top right corner of the screen and select the desired category (*Department, Position, or Task*).

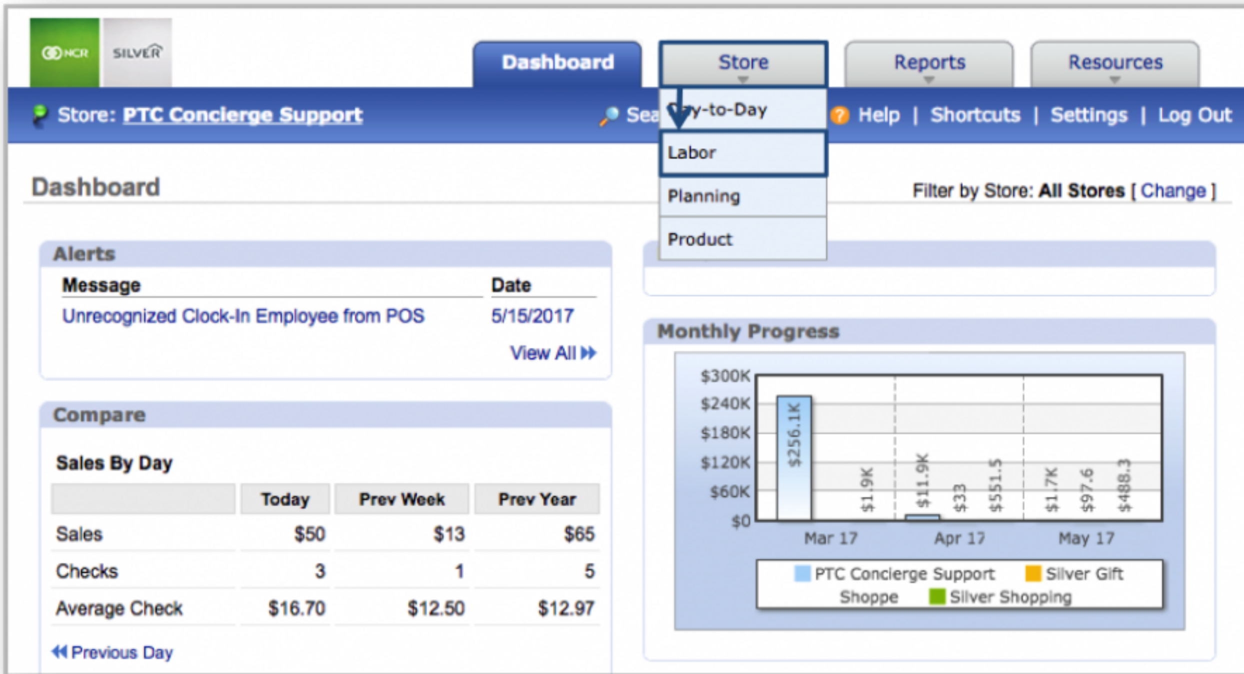


STEP 4: Enter the name and description (optional) of the *Department/Position/Task* in the fields that appear and click Save when done. ***Note***: You will have the option to assign a color to any *Position* you create.

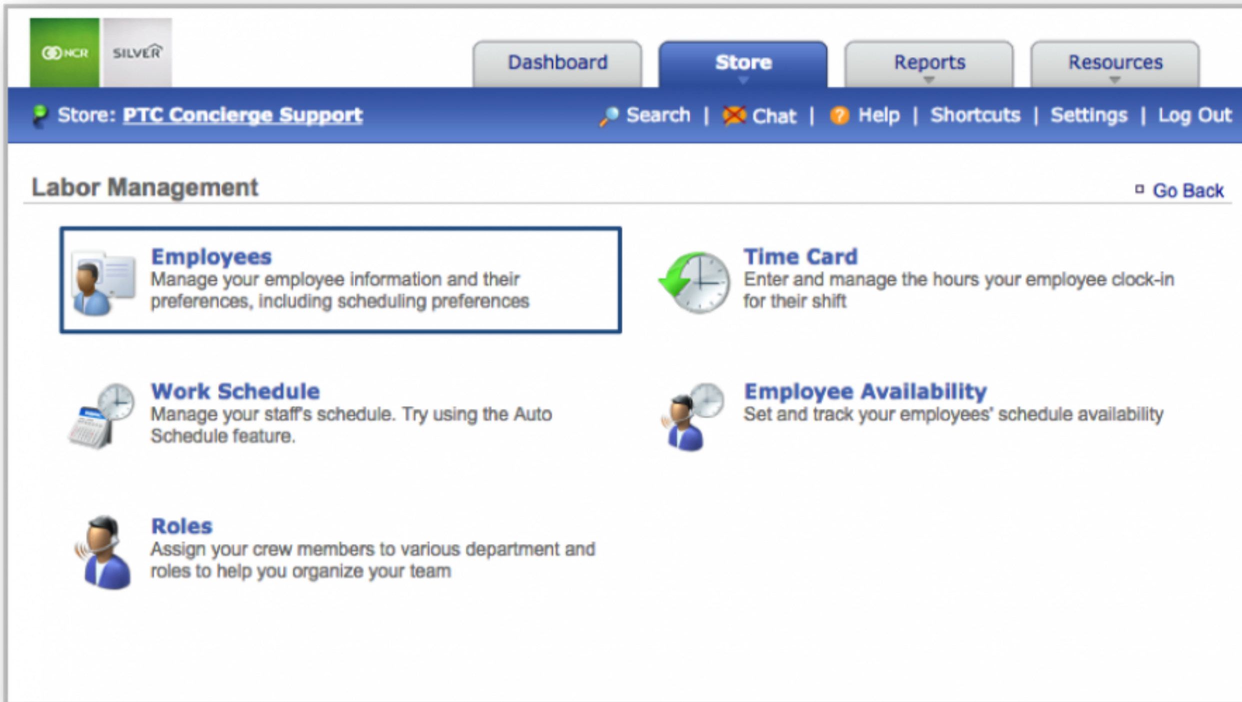


Creating a *New Department, Position or Task,* via an Employee's file.

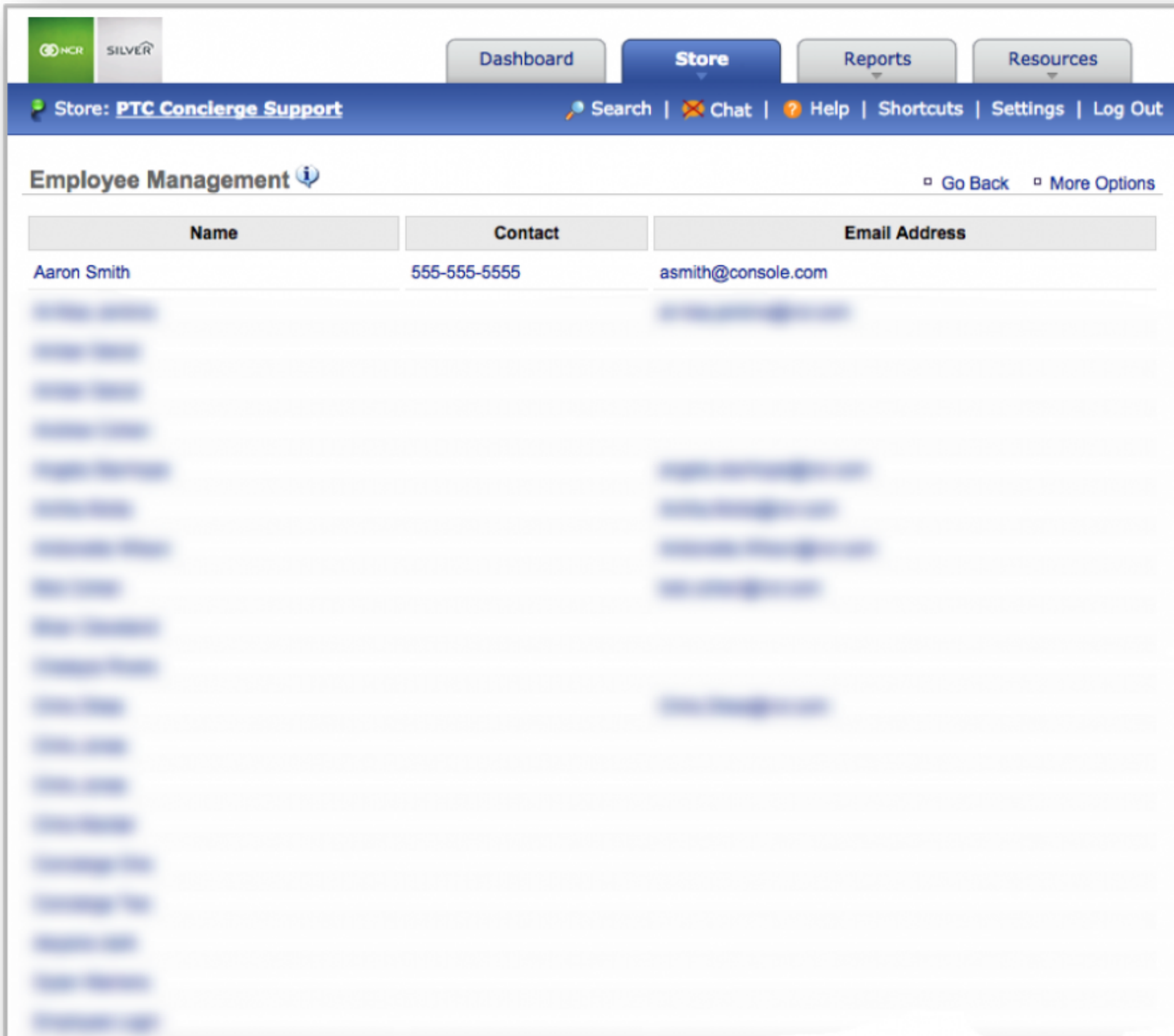
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Labor***.



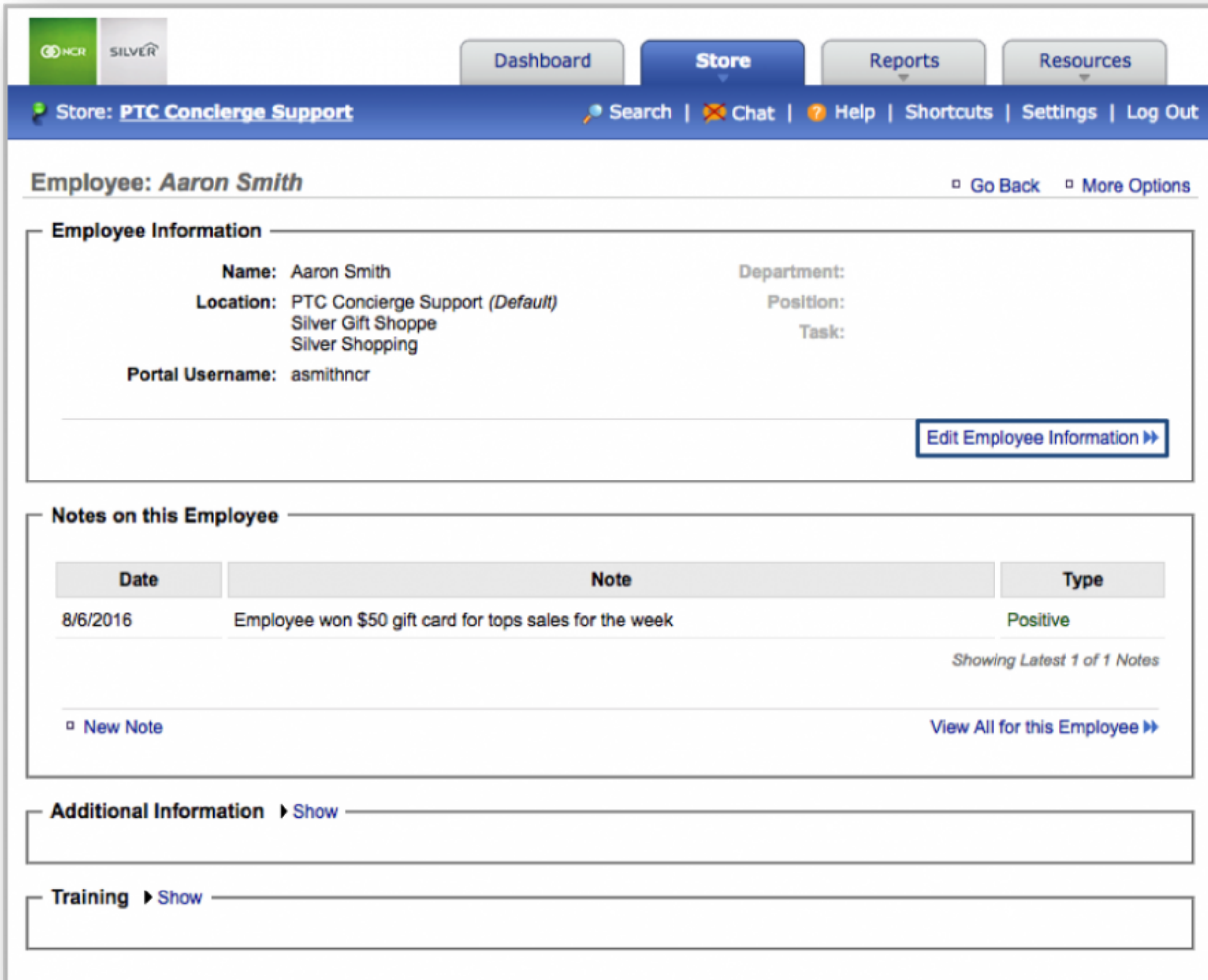
STEP 2: From the Labor Management screen, click ***Employees***.



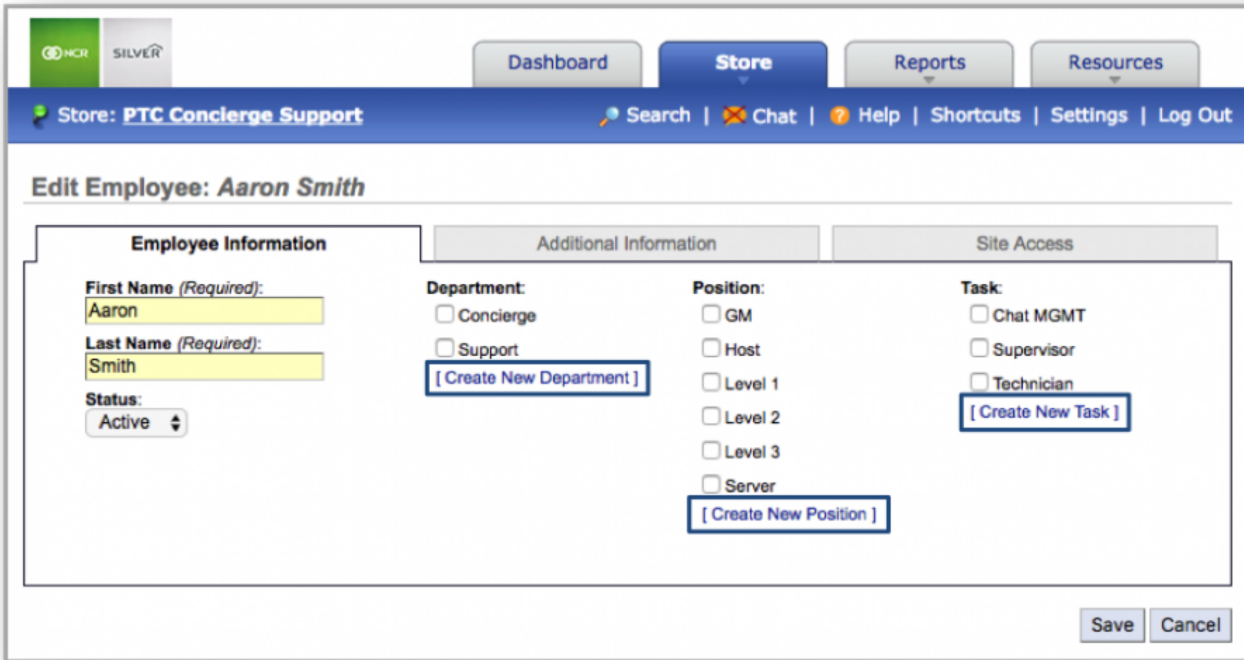
STEP 3: To view information for a specific employee, click on the row with the employee's name shown. The employee's name, location, department, position, and tasks will be shown, if previously assigned.



STEP 4: To edit this information, click ***Edit Employee Information*** in the lower right corner of the top text box. The page will change to show the Edit Employee box.

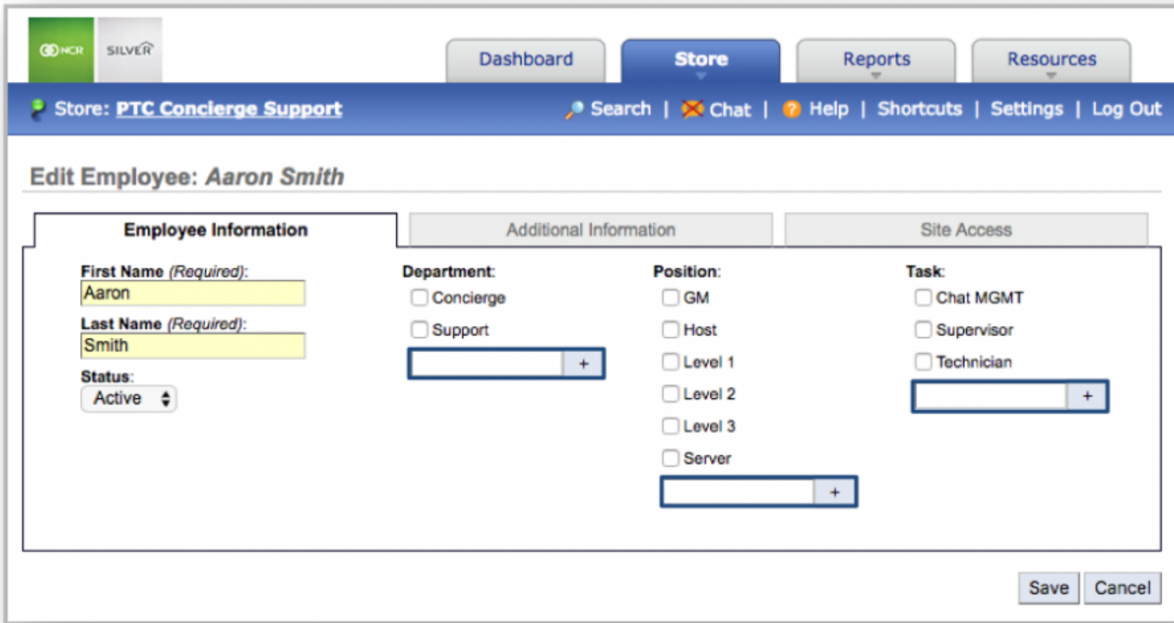


STEP 5: To create a *New Department, Position or Task,* simply click on the ***"Create New…"*** link at the bottom of the category you wish to edit.



- Enter the name of the *Department/Position/Task* in the field that appears
- Click the **+** button to create the *Department/Position/Task*.
- Click the ***Save*** button to assign the new *Department/Position/Task* to the employee.

- Click ***Cancel*** to cancel this process and return to the previous screen.



✻ You may add as many *Departments, Positions, or Tasks* as you wish.

Related Topics:

[Adding New Users to the System]()

[Inactivate an Employee]()

[Delete an Employee]()

[Importing Employee Information via the Unrecognized Clock-In Alert]()

[Managing Existing Users]()

[Adding Employee Notes]()

[Adding Additional Employee Information]()

[Roles & Responsibilities]()

[Adjusting or Setting User Permissions]()

Unrecognized Clock-In Alert

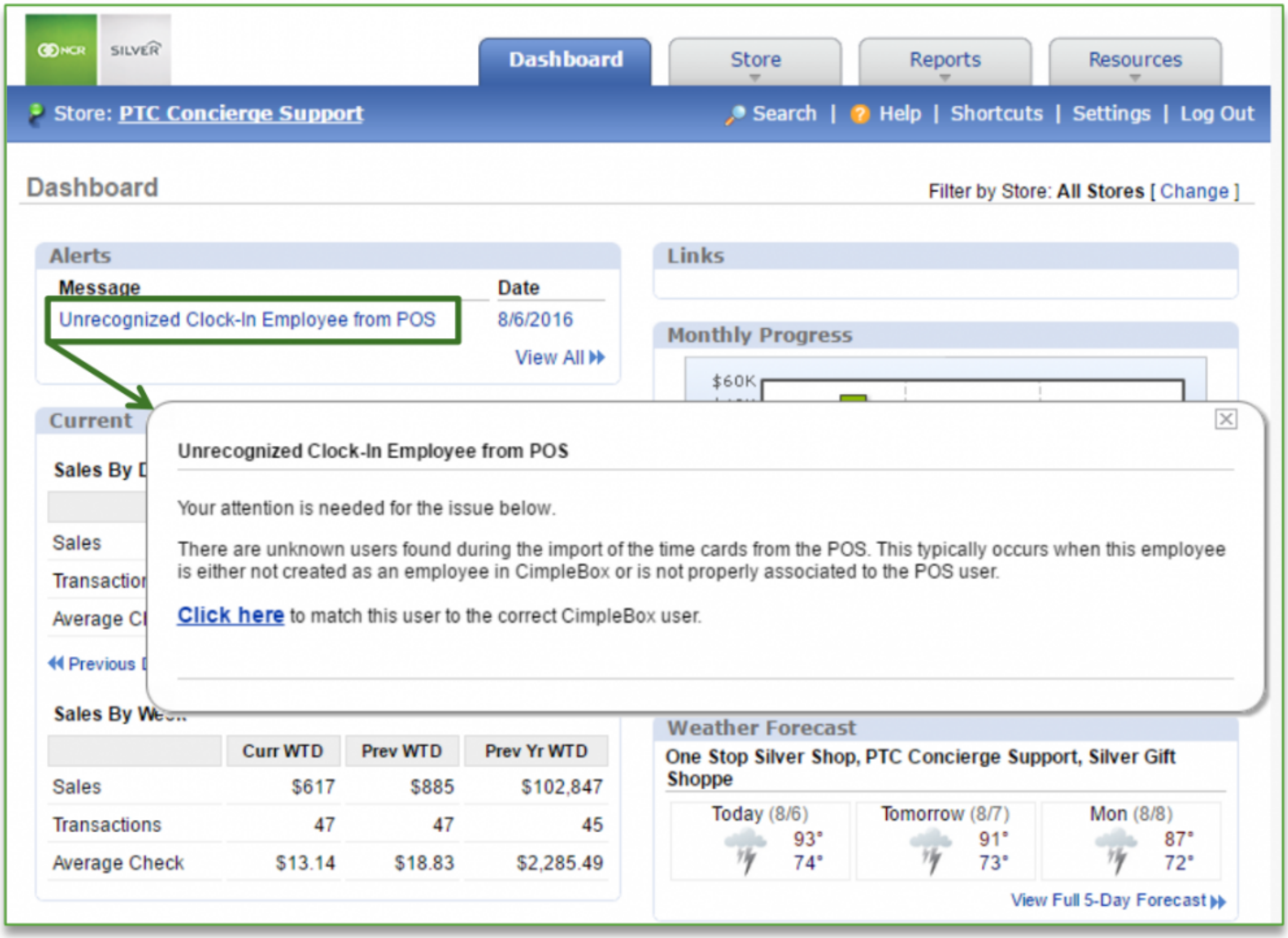
In this module, you will learn:

- The purpose of the Unrecognized Clock-In alert
- How to process Unrecognized Clock-In alerts

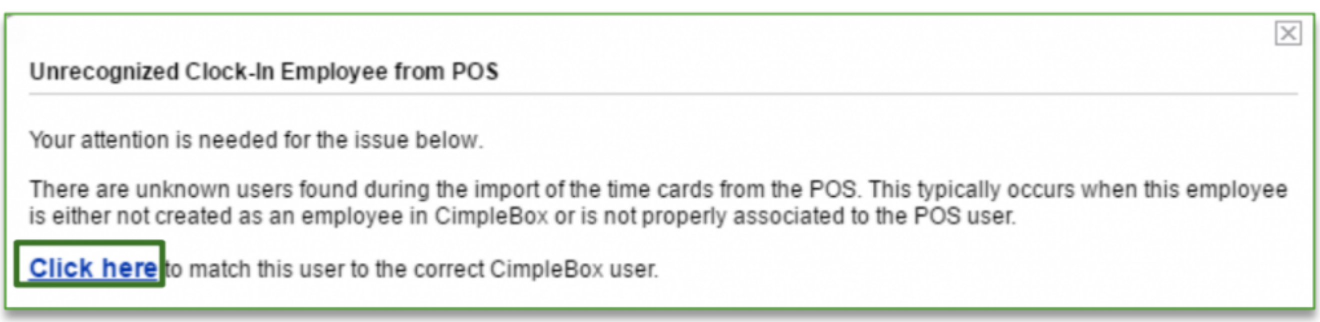
The Purpose of the Unrecognized Clock-In Alert

Employees will clock in and out from the POS for their shifts. The total hours worked, are then reported to Console. Once this happens, you will receive an alert via your Dashboard titled "**Unrecognized Clock-In Employee from POS**".
This alert is telling you that we are now capturing hours worked for your employees that now need to be imported into Console. It is a one-time process that will only need to occur when new employees are hired and using the system for the first time.

Processing Unrecognized Clock-In Alerts
To process unrecognized clock-in alerts you will need to navigate to the **Dashboard** and click **Unrecognized Clock-In Employee from POS** within the alerts box.



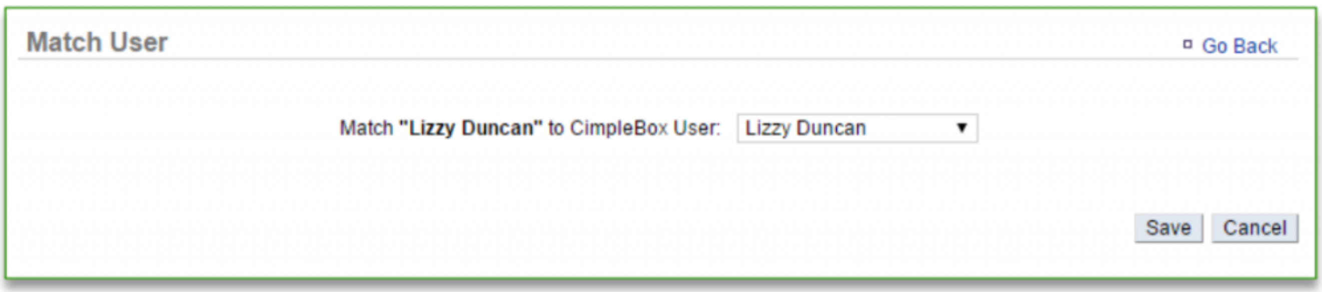
1. Click the **Click here** link within the alert



2. Click **Match Employee** to the right of the employee's name(s)
   a. If you have multiple locations, you will not have to select the location that the employee belongs to. The system will automatically show the store that your employee is assigned to, based on

the POS from which they clock in and out

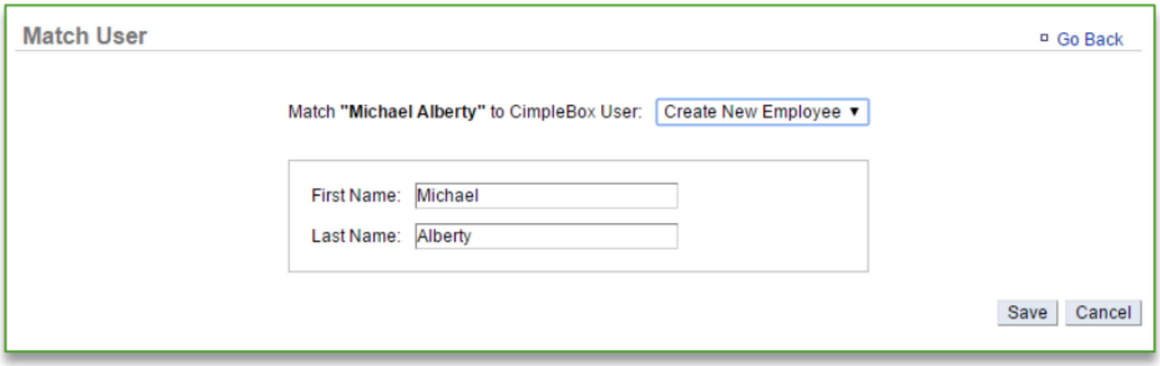
3. If the employee has already been created within Console, their name will automatically appear to the right of the **Match "…" to CimpleBox User**



   a. If the employee has not been created in Console yet, **Select a User** will appear to the right of **Match "…" to CimpleBox User**
   b. Click the dropdown arrow to the right of User
   c. Select **Create New Employee**

   d. The employee's first and last name will auto-populate in the open fields below

i. First and last name is required



4. Click **Save**
   a. Once you have imported an employee's hours, you will have the ability to edit their record to add additional details such as phone number, email address, pay rate, start date, etc. This can be done via the **Employee Management** portal. Refer to the **Managing Existing Users** training module for more information.

Related Topics:
Managing Existing Users
Inactivate an Employee
Delete an Employee
Creating a new Department, Position or Task: How to create a new Department, Position or Task.
Adding Employee Notes
Adding Additional Employee Information
Roles & Responsibilities
Adjusting or Setting User Permissions

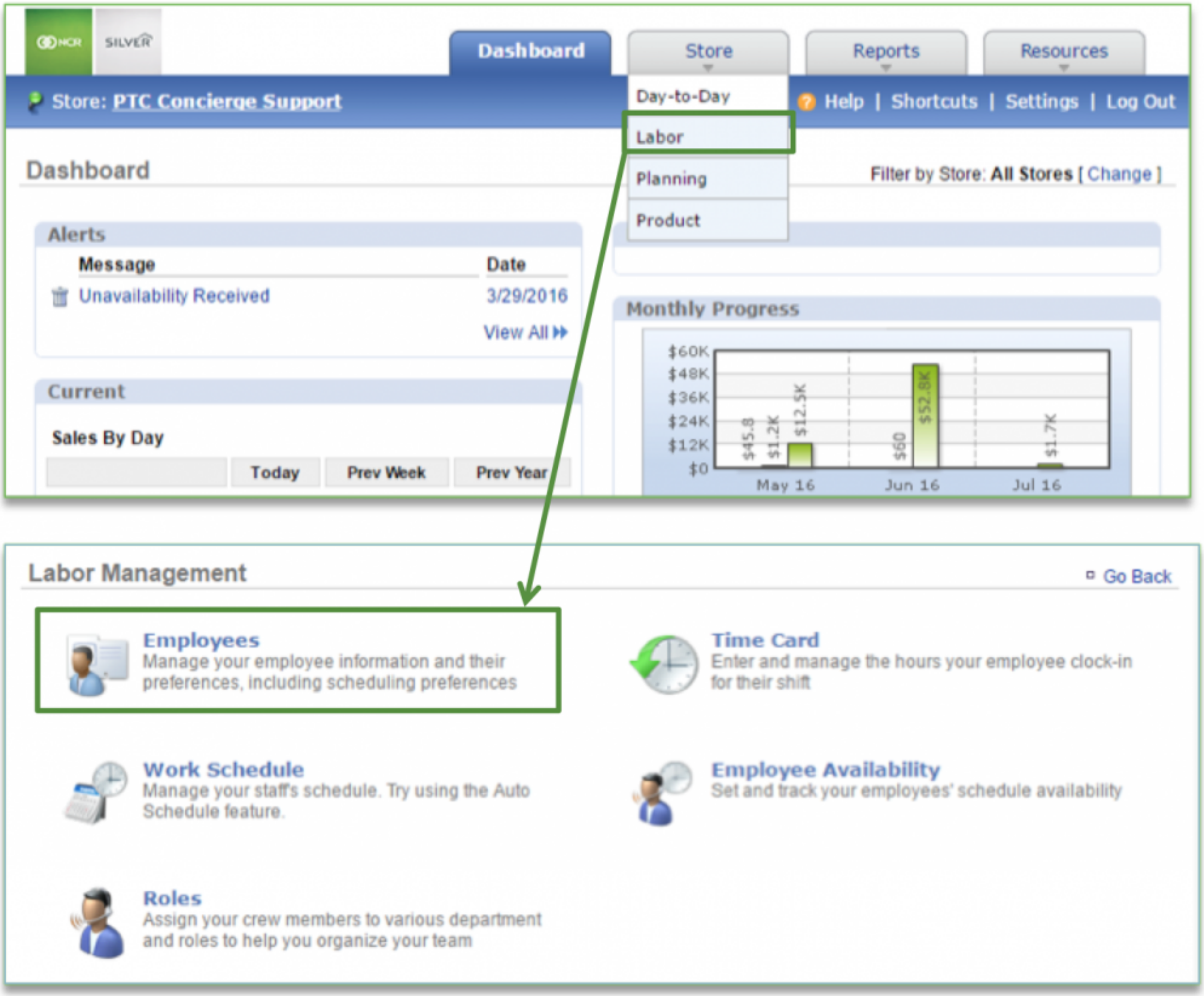
Employee Notes

In this module, you will learn:

- How to add notes to employee records
- How to view or modify notes that have already been added to an employee record

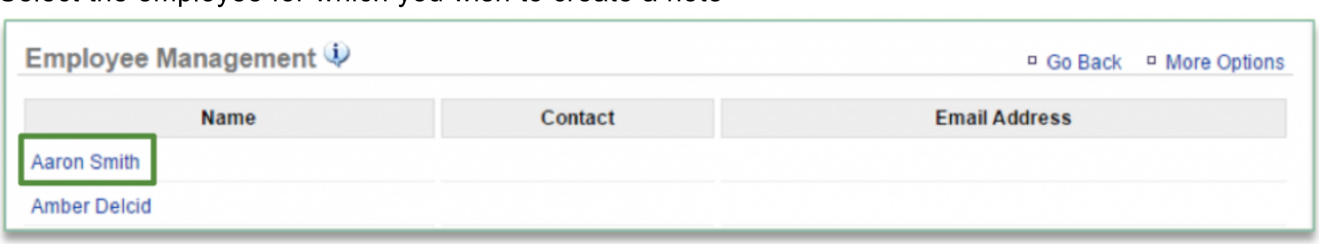
How to Add Notes to Employee Record

To create a note for an employee you will need to navigate to the **Labor Management** module and click **Employees**.

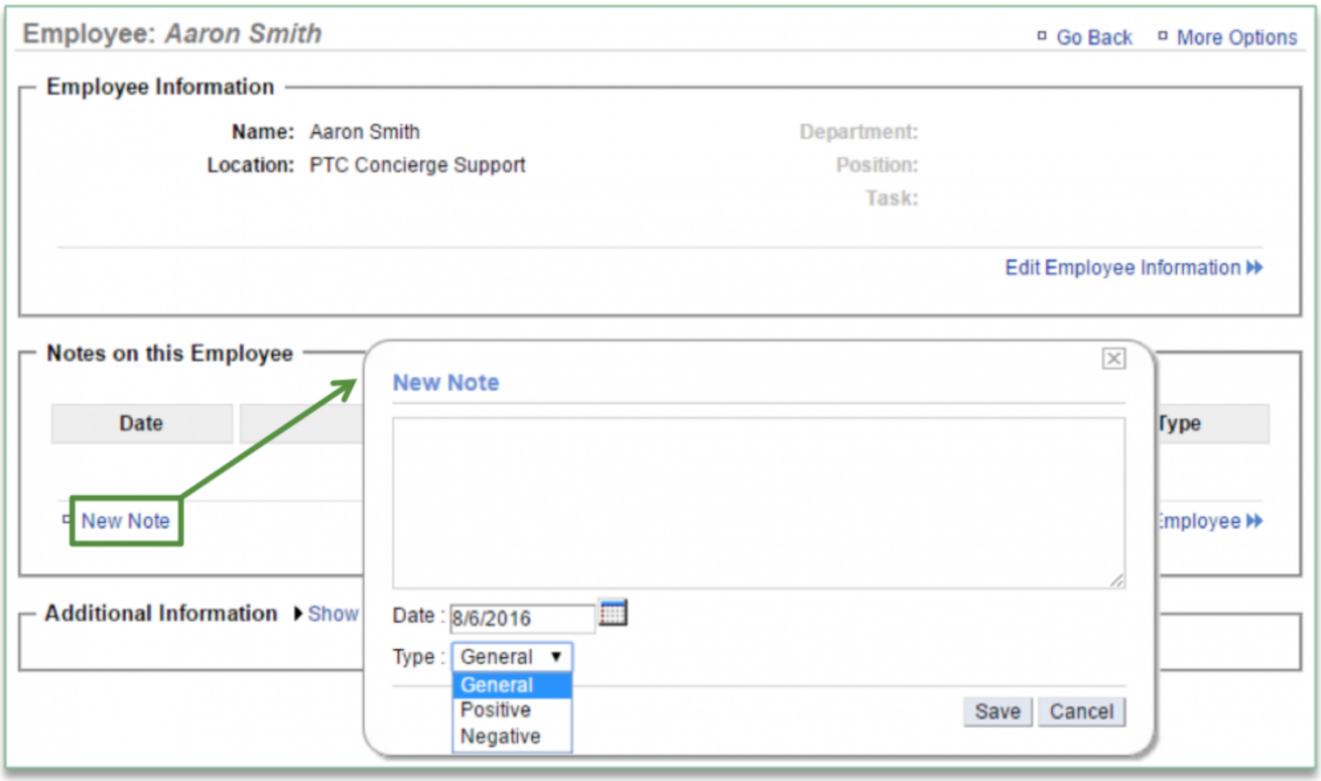


Creating a New Note

1. Select the employee for which you wish to create a note

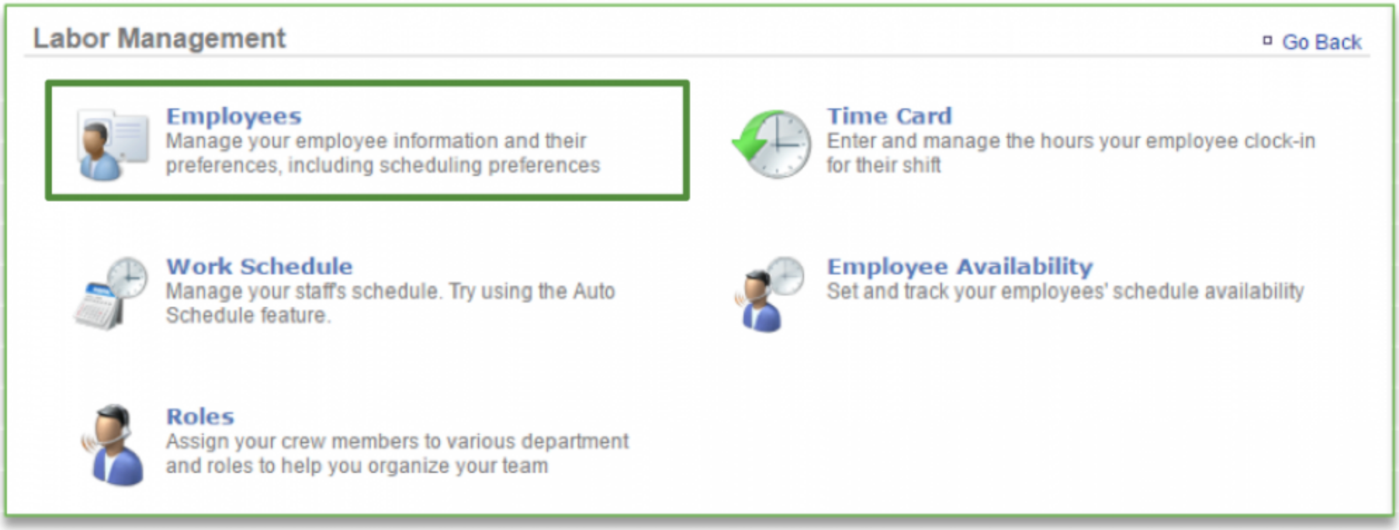


2. Click **New Note**
3. A blank note will appear in a floating window
4. Enter text for your note
5. Select the note date
6. Select the type of note (e.g. General, Positive or Negative) by clicking the drop down arrow to the right of **Type**
7. Click **Save**

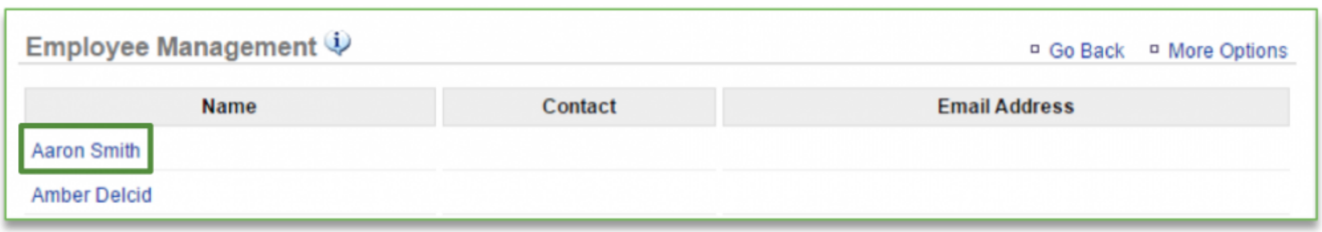


How to View or Modify Existing Employee Notes

To view or modify a note for an employee you will need to navigate to the **Labor Management** module and click **Employees**.

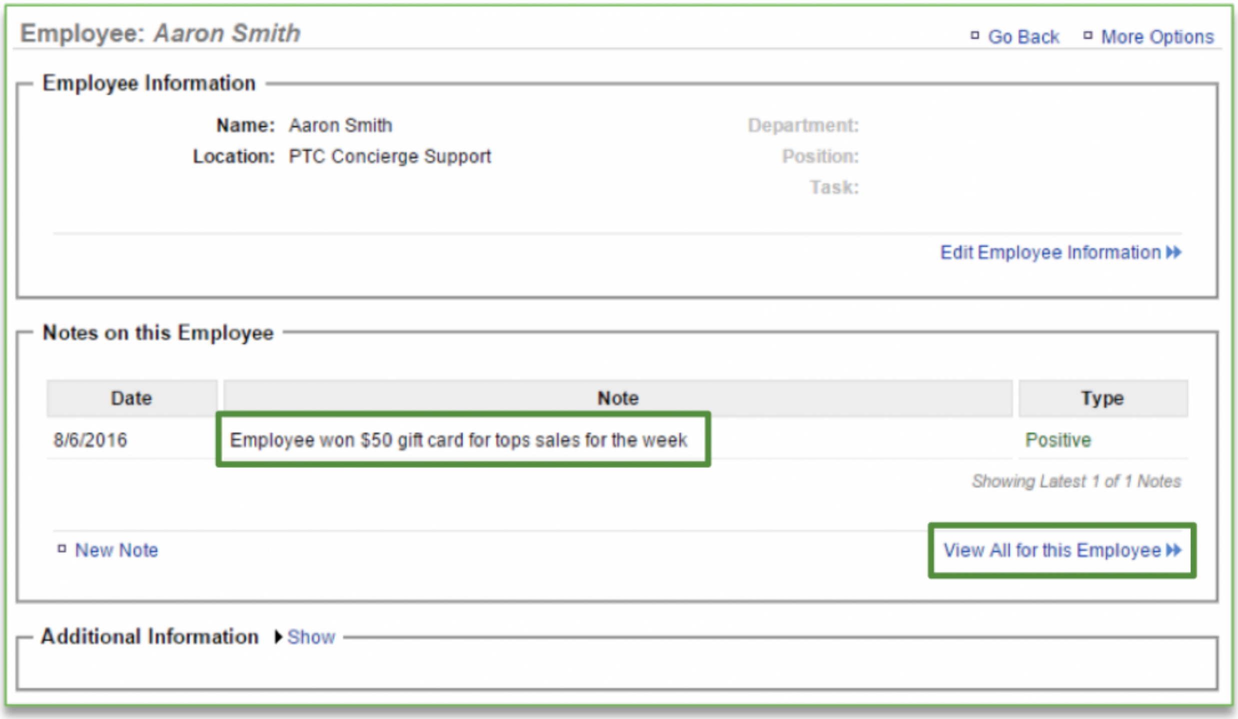


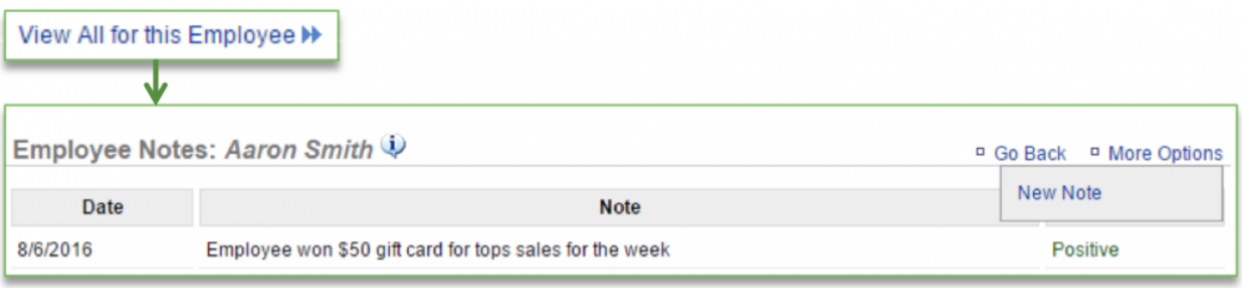
1. Select the employee you wish to view or modify a note for



2. Any notes that have been created for the employee will appear
3. Click the note you wish to view or modify

a. You can also click **View All for this Employee** to view all notes

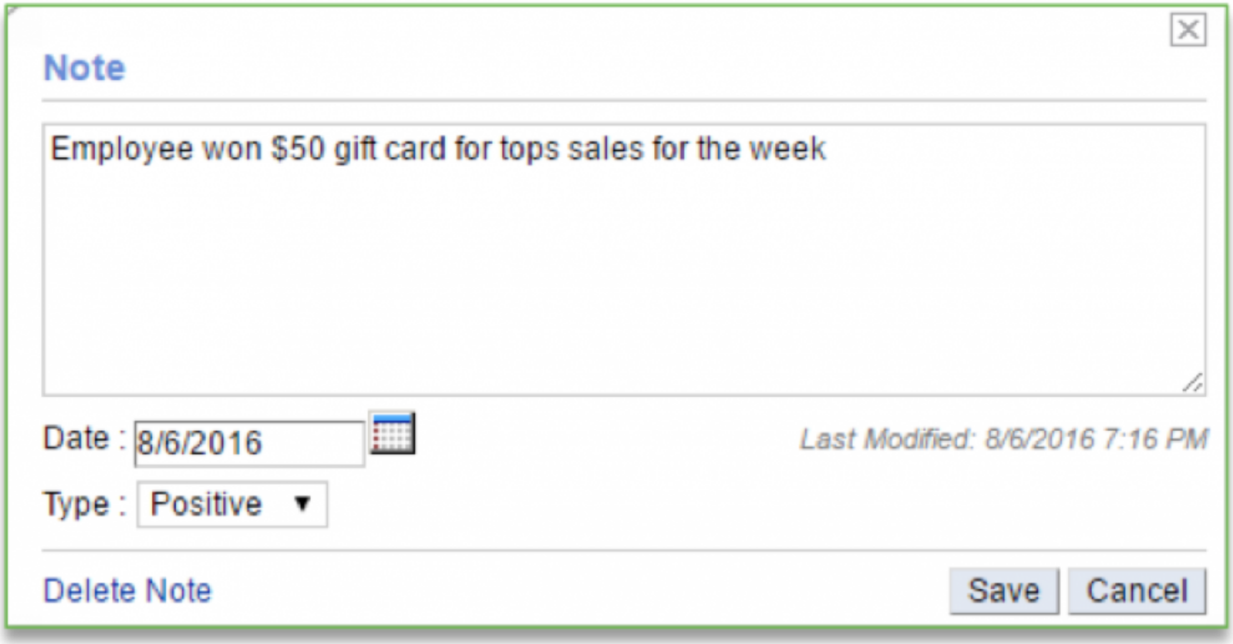




Note: You can add a new note at any time from this screen by clicking **More Options** and **New Note.**

4. Once you have selected the note you wish to view or modify, it will appear in a floating window

a. From this window, you can edit the note, select a different note date, change the note type or delete the note



5. Click **Save** if you've made changes or the "x" at the top right corner to close the window
   a. The *Last Modified* date will change if you've made edits to the note

Related Topics:

[Adding New Users to the System]
[Inactivate an Employee]
[Delete an Employee]
[Managing Existing Users]
[Creating a new Department, Position or Task]: How to create a new Department, Position or Task.
[Importing Employee Information via the Unrecognized Clock-In Alert]
[Adding Additional Employee Information]
[Roles & Responsibilities]
[Adjusting or Setting User Permissions]

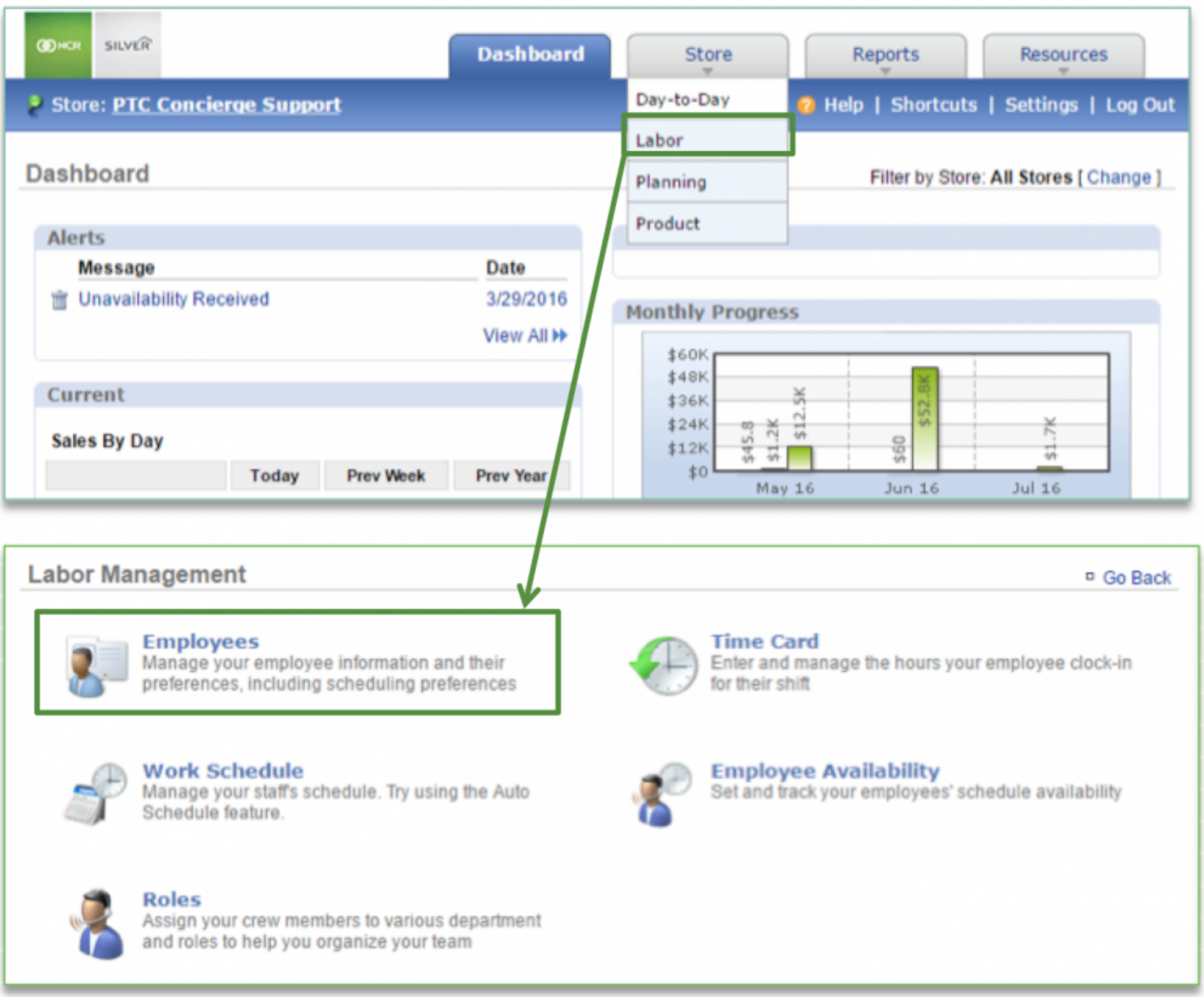
Additional Employee Info.

In this module, you will learn:

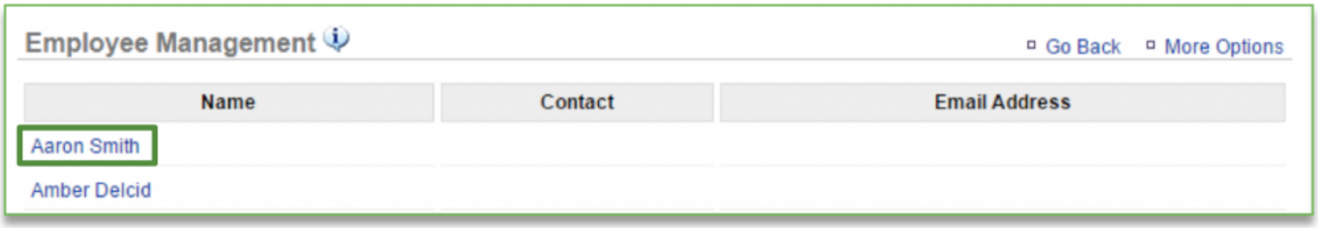
- How to add additional information to an employee record
- How to view or edit additional information that has already been created

Adding Additional Information

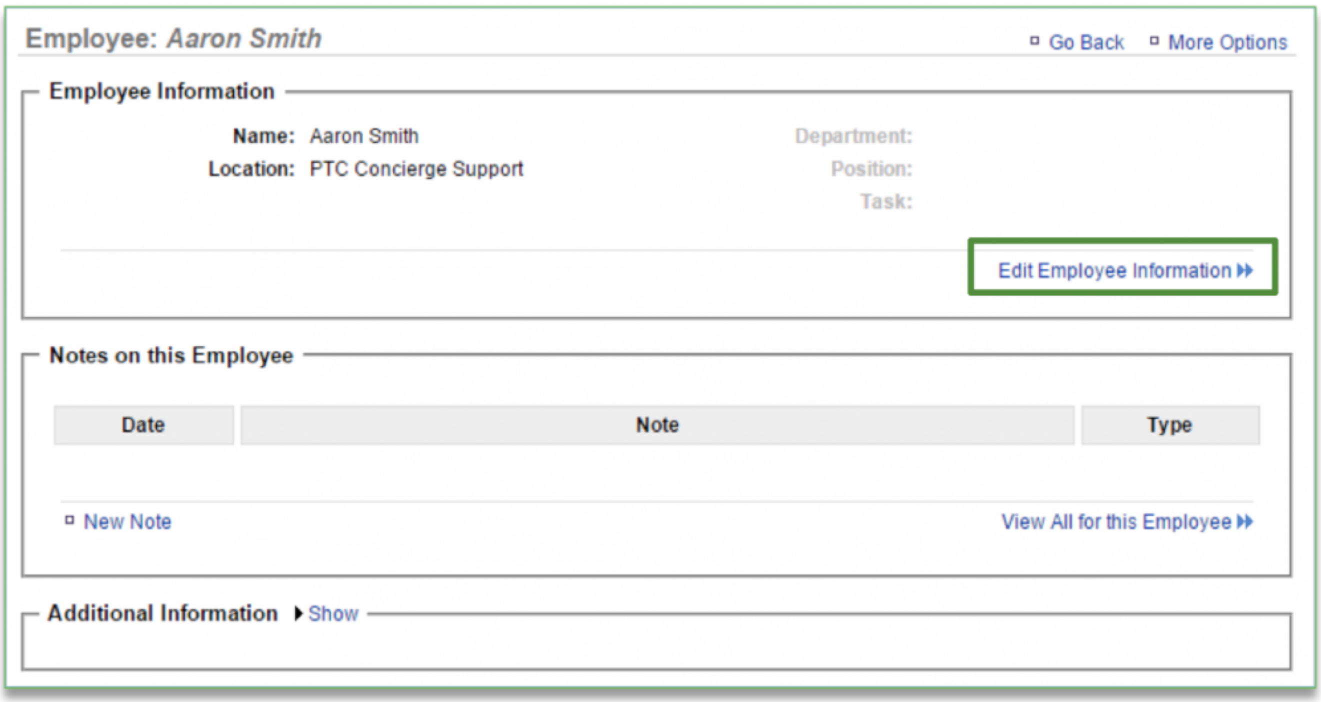
To add additional information to an employee record you will need to navigate to the **Labor Management** module and click **Employees**.



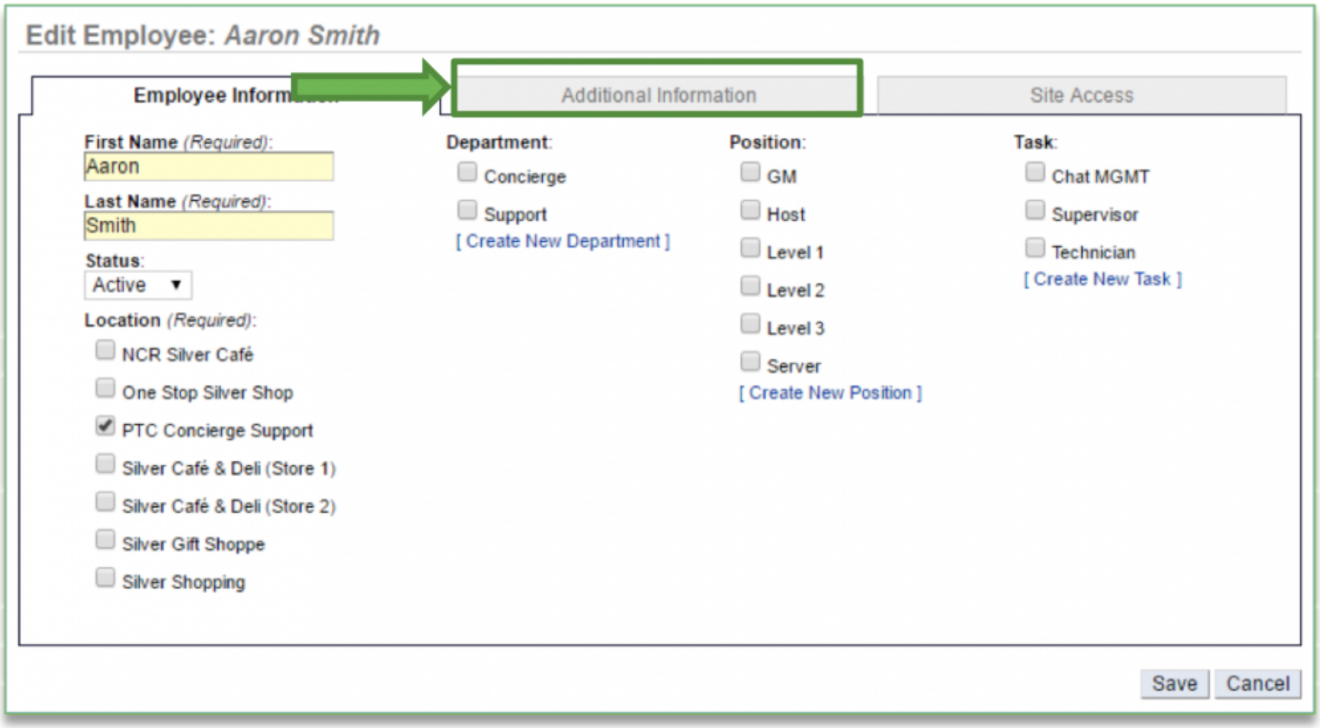
1. Select the employee you wish to add additional information for (*this can also be done curing the creation of a new employee*)



2. Click **Edit Employee Information**

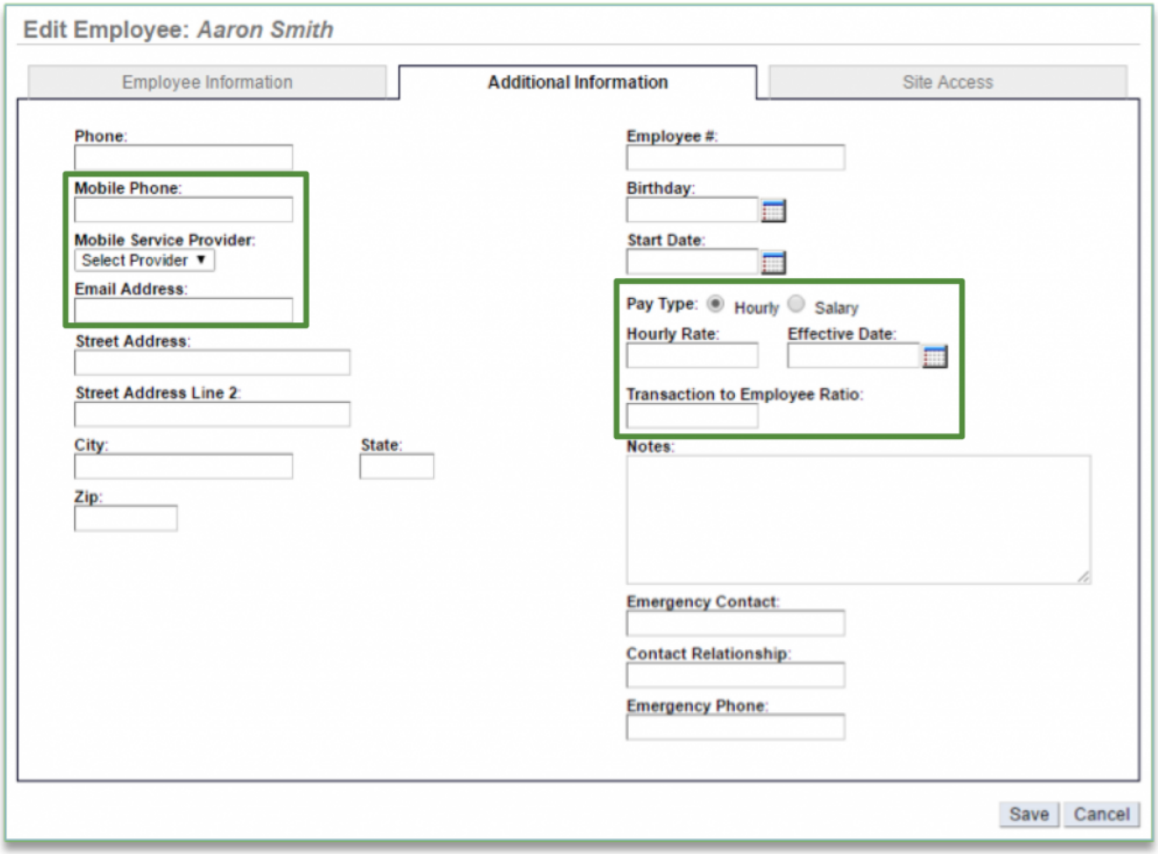


3. Click the **Additional Information** tab



4. Enter the additional information you wish to add in the open fields to the right of each item. At a minimum, we recommend that you add
   a. Mobile Phone Number and Mobile Service Provider (enables text messaging to communicate the work schedule)
      i. Standard messaging rates will apply to the employee
   b. Email Address (allows you to communicate the work schedule)
   c. Pay Rate Information (allows you to track labor costs)
      i. You will have the option to enter it based on hourly rate or salary
      ii. Keep in mind that if you have a salaried employee that works at more than one of your locations, for reporting purposes, their salary will be evenly distributed across all locations based on the number of locations you have
   d. *Transaction to Employee Ratio* is the number of customers an employee can serve per hour
      i. Ratio is used to help the system forecast labor and the ratio you enter will vary by employee and job performance

ii. You can use a starting point of 10-20 and adjust as needed

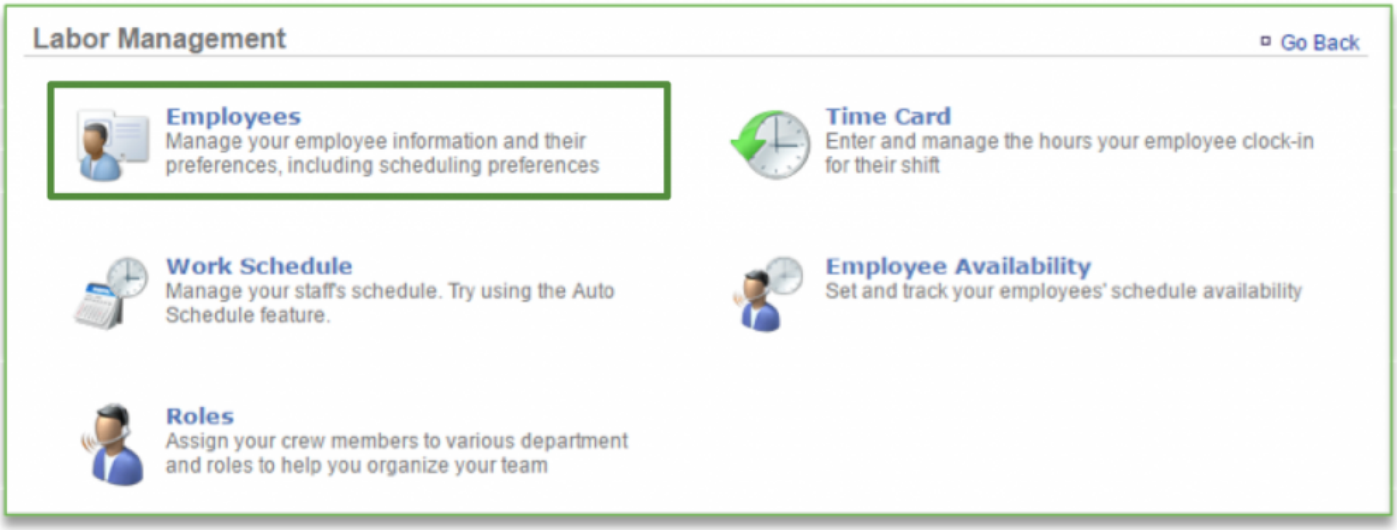


5. Click **Save**

View or Modify Additional Information

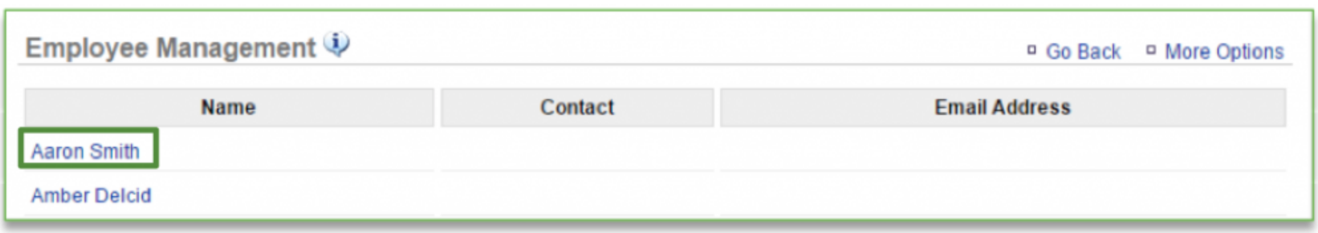
To view or modify additional information for an employee record you will need to navigate to the **Labor**

Management module and click **Employees**.

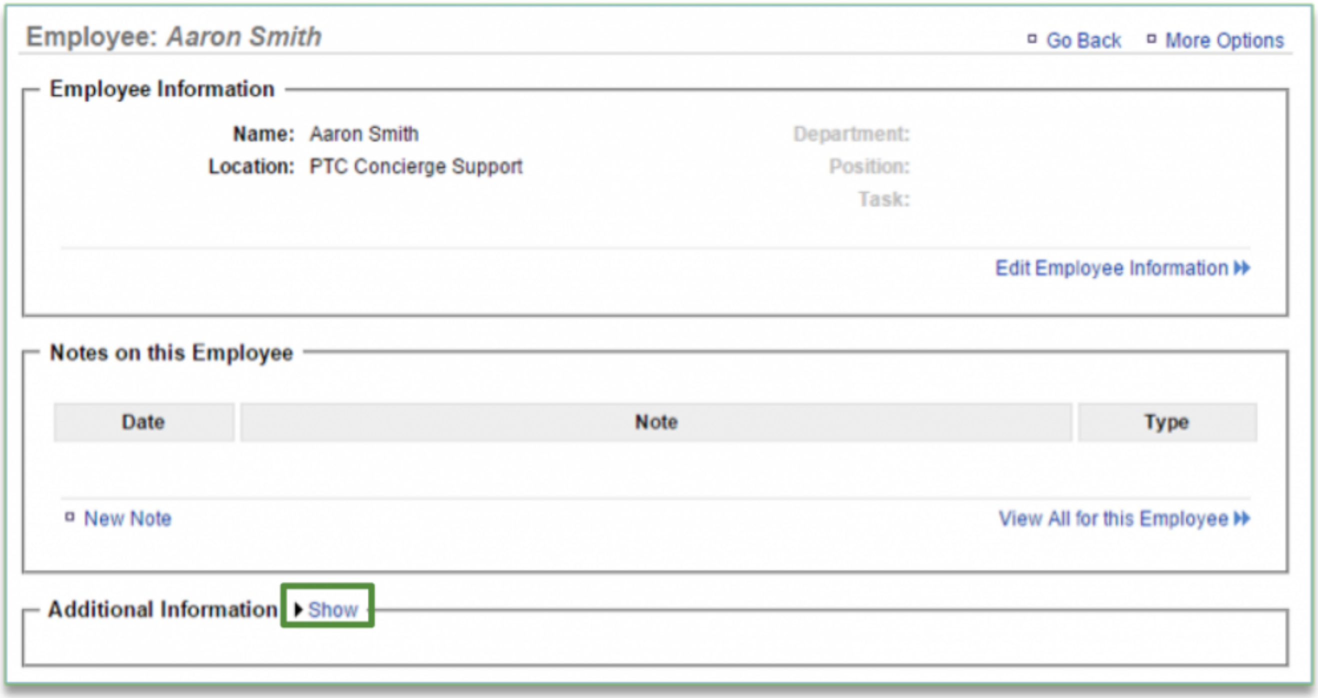


Editing Additional Information

1. Select the employee for which you wish to view or modify additional information

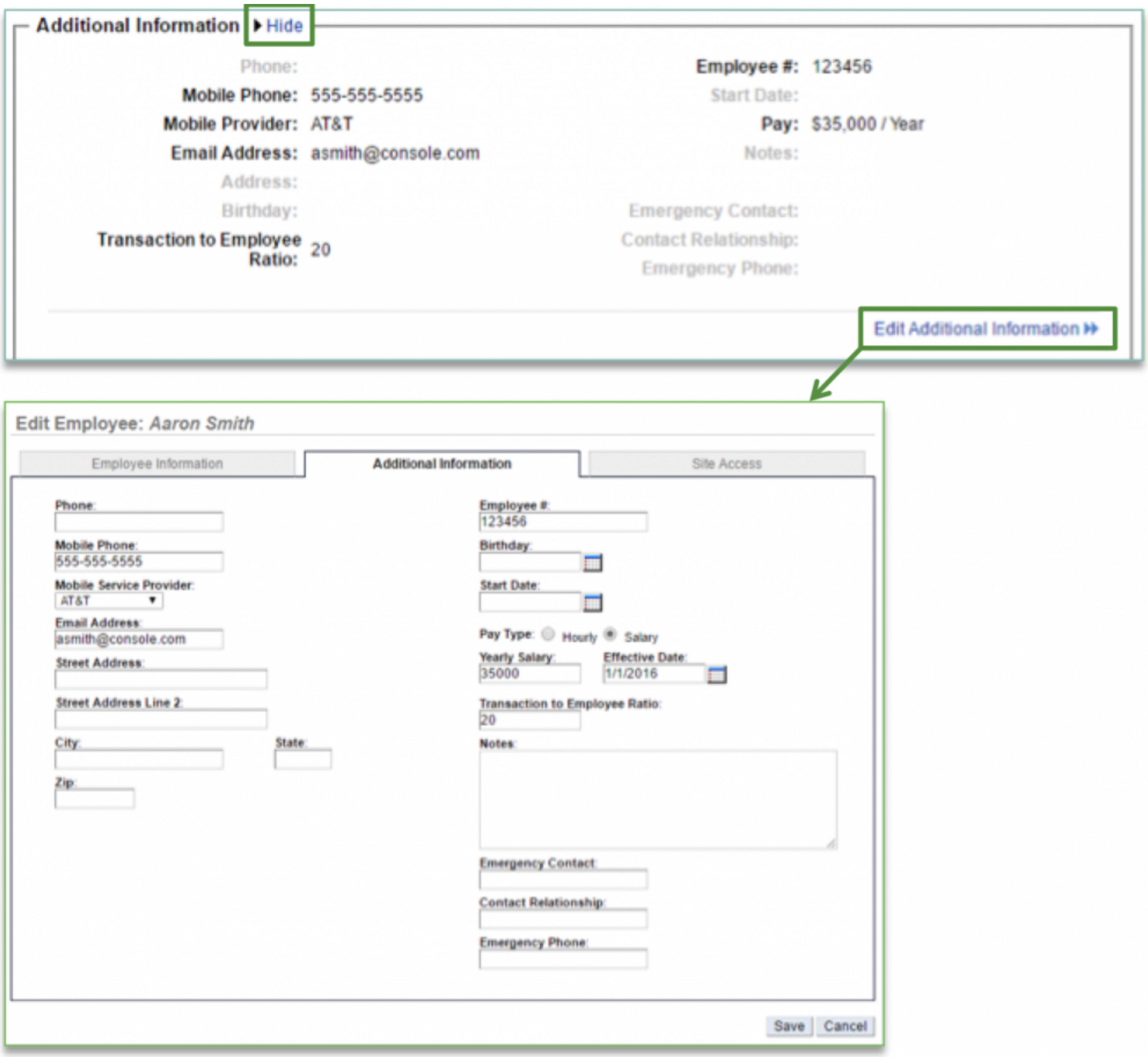


2. Click **Show** to the right of **Additional Information**



3. This will expand the window to show any additional information that you have entered for your employee
    a. Click **Hide** to the right of **Additional Information** to collapse the window
    b. Click **Edit Additional Information** at the bottom right of the window to edit information for the employee

i. Click **Save**



Related Topics:

[Adding New Users to the System]

[Inactivate an Employee]

[Delete an Employee]

[Managing Existing Users]

[Creating a new Department, Position or Task]: How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert]

[Adding Employee Notes]

[Roles & Responsibilities]

[Adjusting or Setting User Permissions]

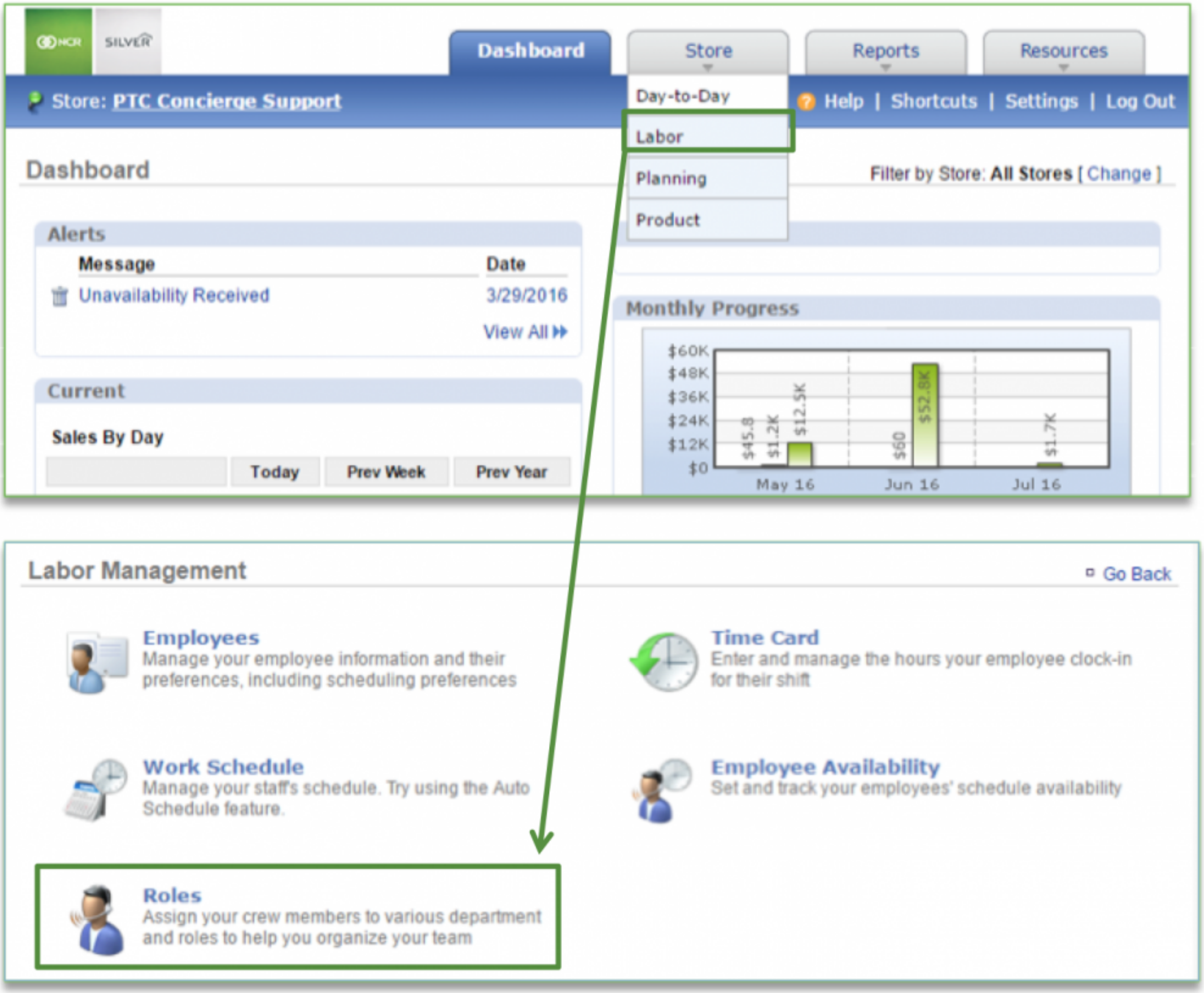
Roles & Responsibilities

In this module, you will learn:

- How to create new Departments, Positions and Tasks within the Roles management platform
- How to create new Departments, Positions and Tasks within an employee record
- How to edit Department, Positions and Tasks

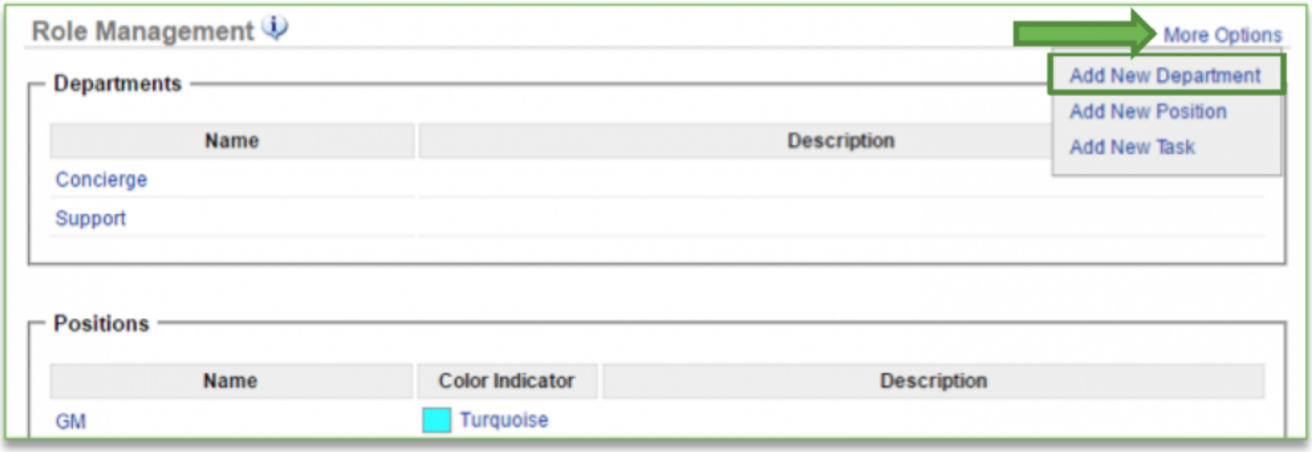
*Creating New Departments, Positions and Tasks

To create a new user you will need to navigate to the **Labor Management** module and click **Roles**.

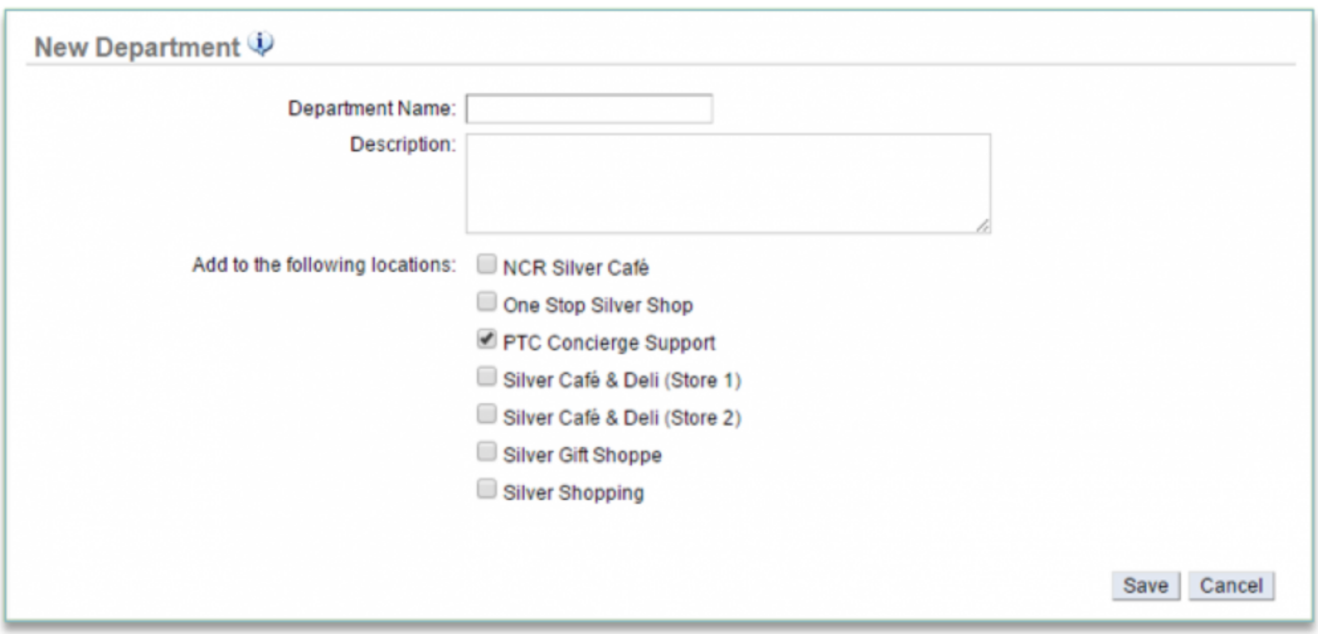


1. Click **More Options**

2. Click **Add New Department**



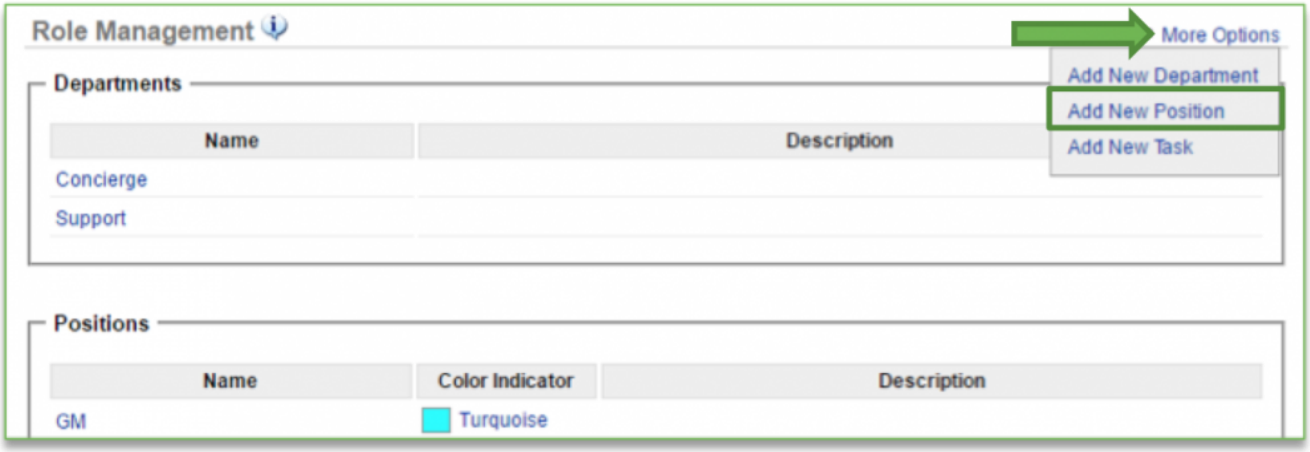
3. Enter the **Department Name**
4. Enter a **Description** (*optional*)
5. Select all locations that this department should be applied to
6. Click **Save**



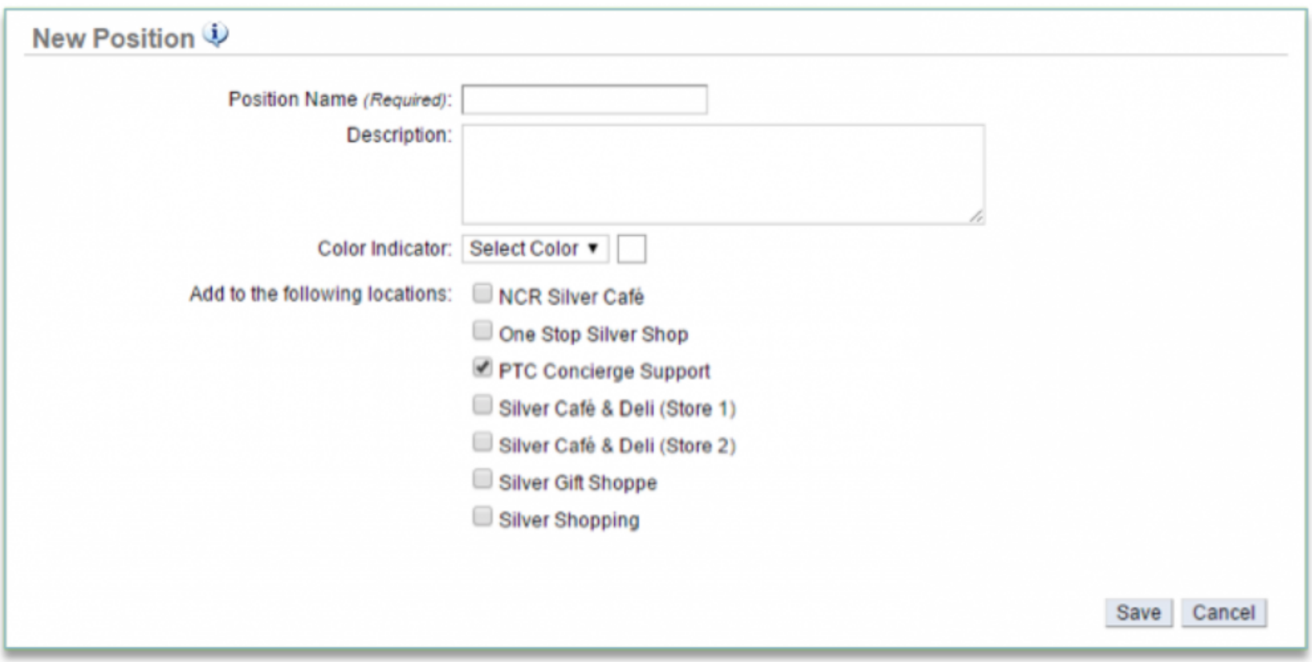
To Create a New Position

1. Click **More Options**

2. Click **Add New Position**



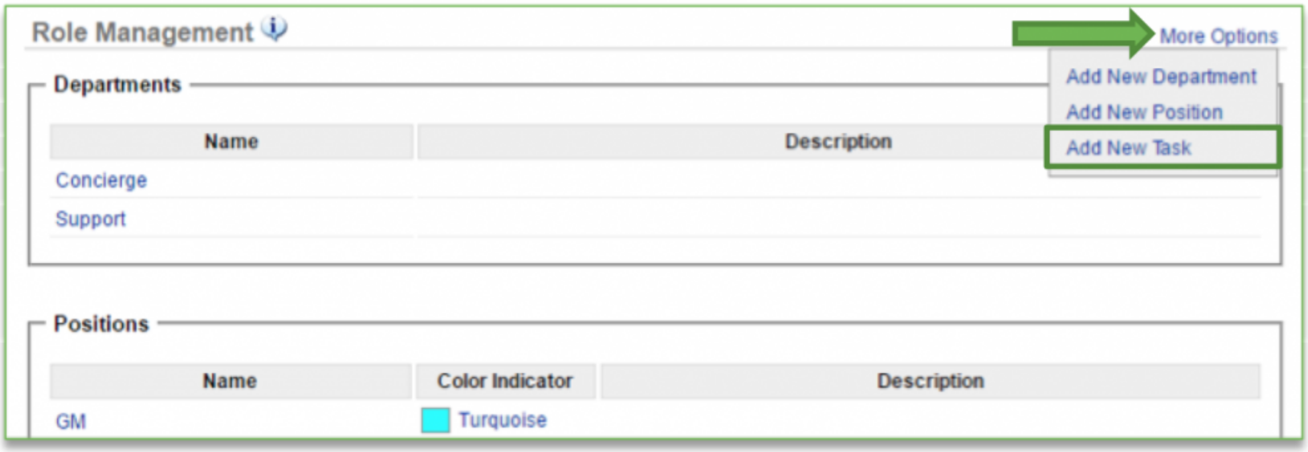
3. Enter the **Position Name**
4. Enter a **Description** (*optional*)
5. Select the **Color Indicator** (*optional*). You can choose to display this color within the work schedule
6. Select all locations that this position should be applied to
7. Click **Save**



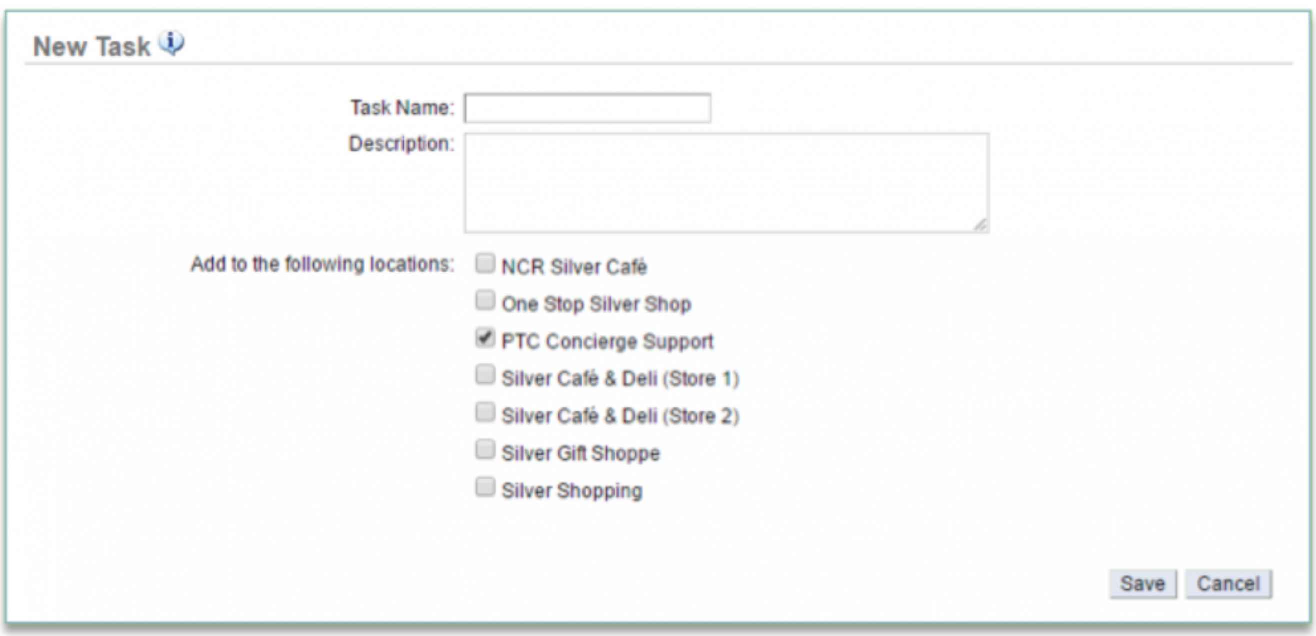
To Create a New Task

1. Click **More Options**

2. Click **Add New Task**

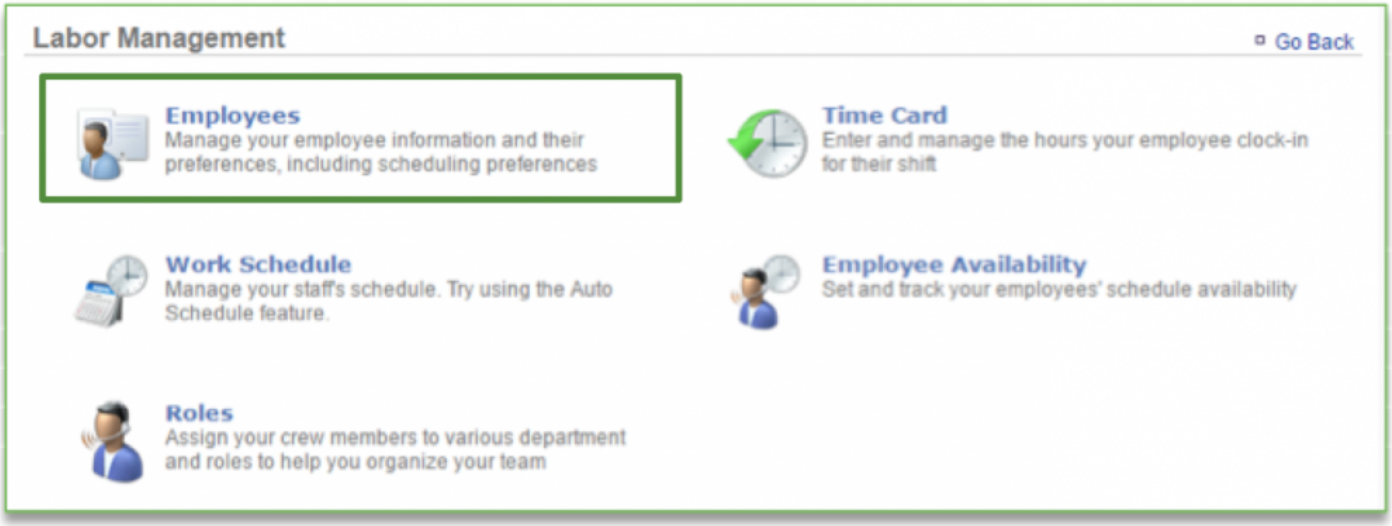


3. Enter the **Task Name**
4. Enter a **Description** (*optional*)
5. Select all locations that this task should be applied to
6. Click **Save**



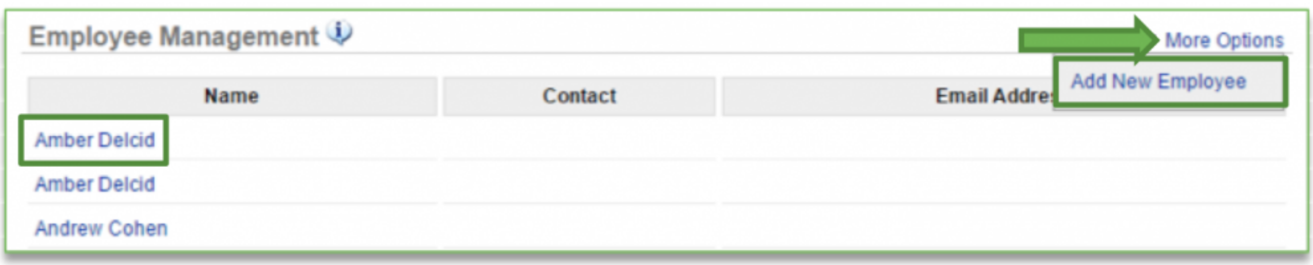
Creating New Departments, Positions and Tasks Within an Employee Record

To create a new user within an employee record you will need to navigate to the **Labor Management** module and click **Employees**.



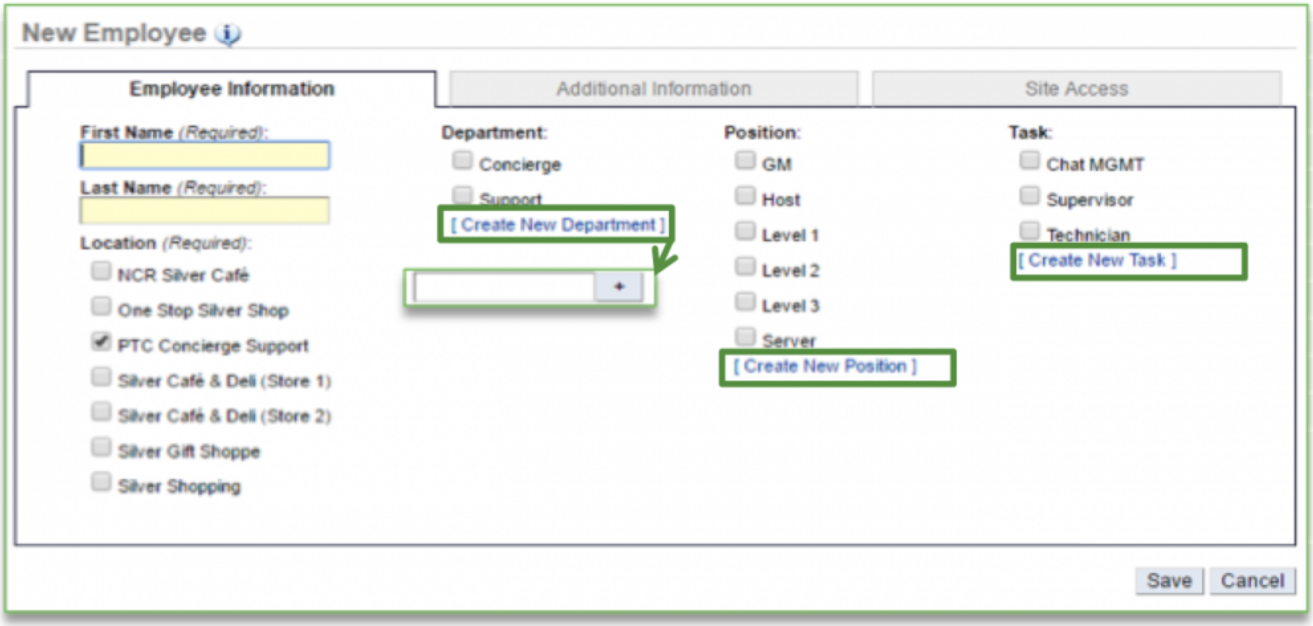
To Create Departments, Positions and Tasks Within an Employee Record

1. Select any employee already created, or click **More Options** and **Add New Employee**



2. Click the Create New Department, Create New Position, or Create New Task links below each category
   a. This will open a field that allows you to enter text
3. Enter your text and click the + symbol

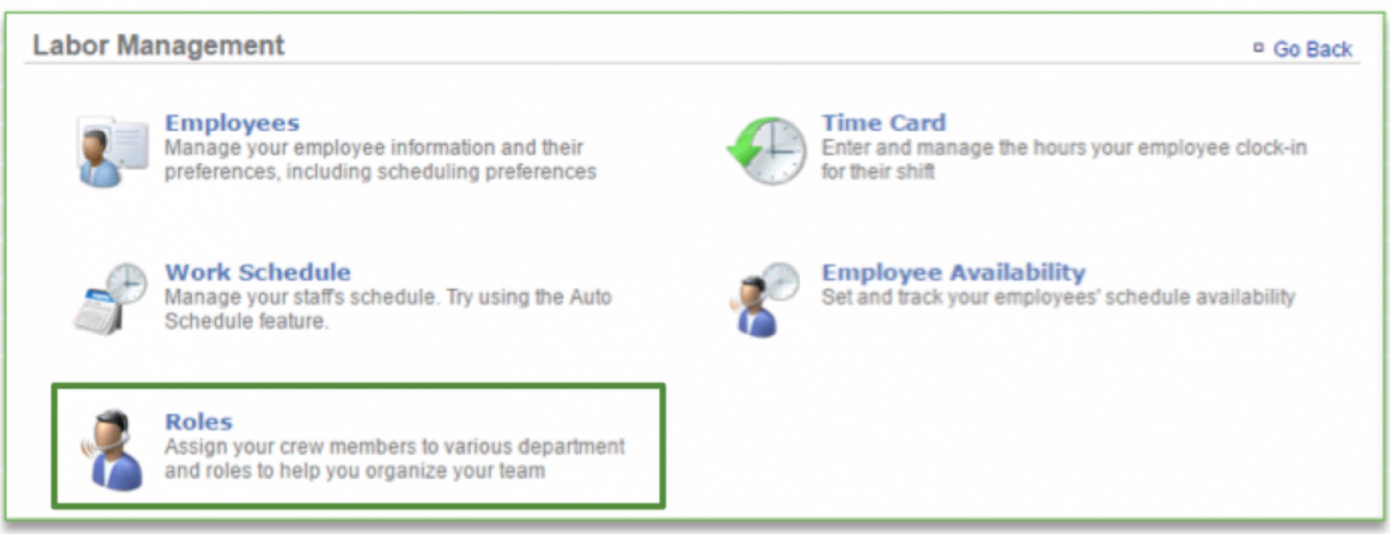
4. Click **Save**



Once you have created departments, positions and tasks, you will have the ability to assign them to your employee(s) by checking the box to the left of the created items. Employees may be assigned to multiple departments, positions and tasks.

Editing Departments, Positions and Tasks

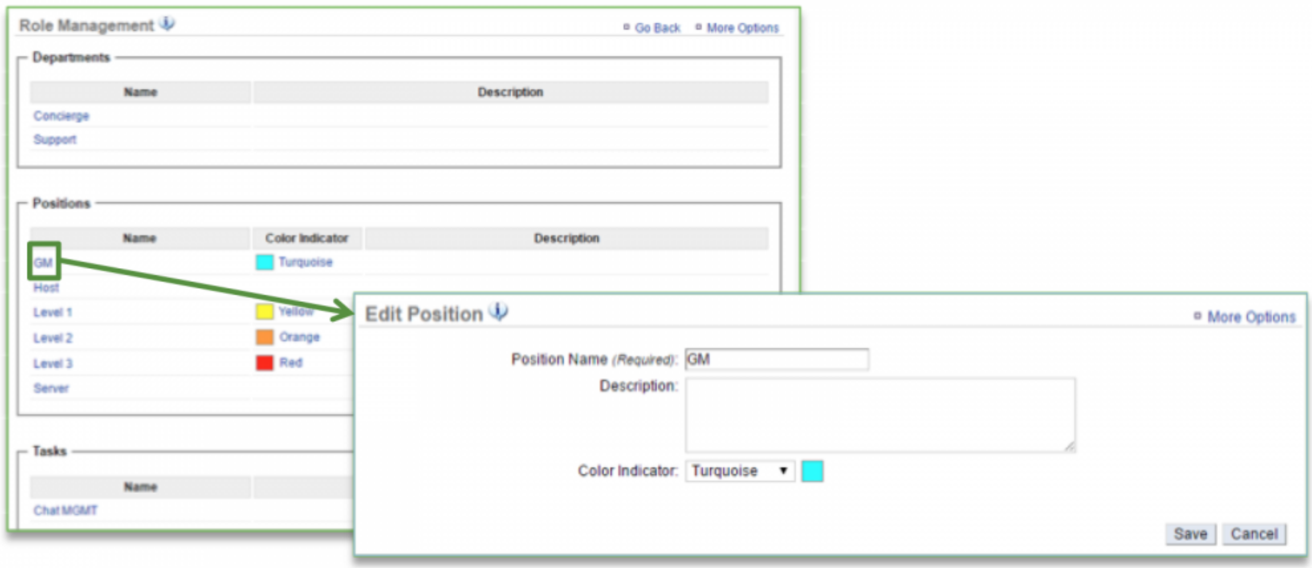
To edit a new user you will need to navigate to the **Labor Management** module and click **Roles**.



Editing Existing Departments, Positions and Tasks

To edit a department, position or task within an employee record:

1. Click any department, position or task already created
2. Make your edits and click **Save**



Related Topics:

[Adding New Users to the System]()

[Inactivate an Employee]()

[Delete an Employee]()

[Managing Existing Users]()

[Creating a new Department, Position or Task](): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert]()

[Adding Employee Notes]()

[Adding Additional Employee Information]()

[Adjusting or Setting User Permissions]()

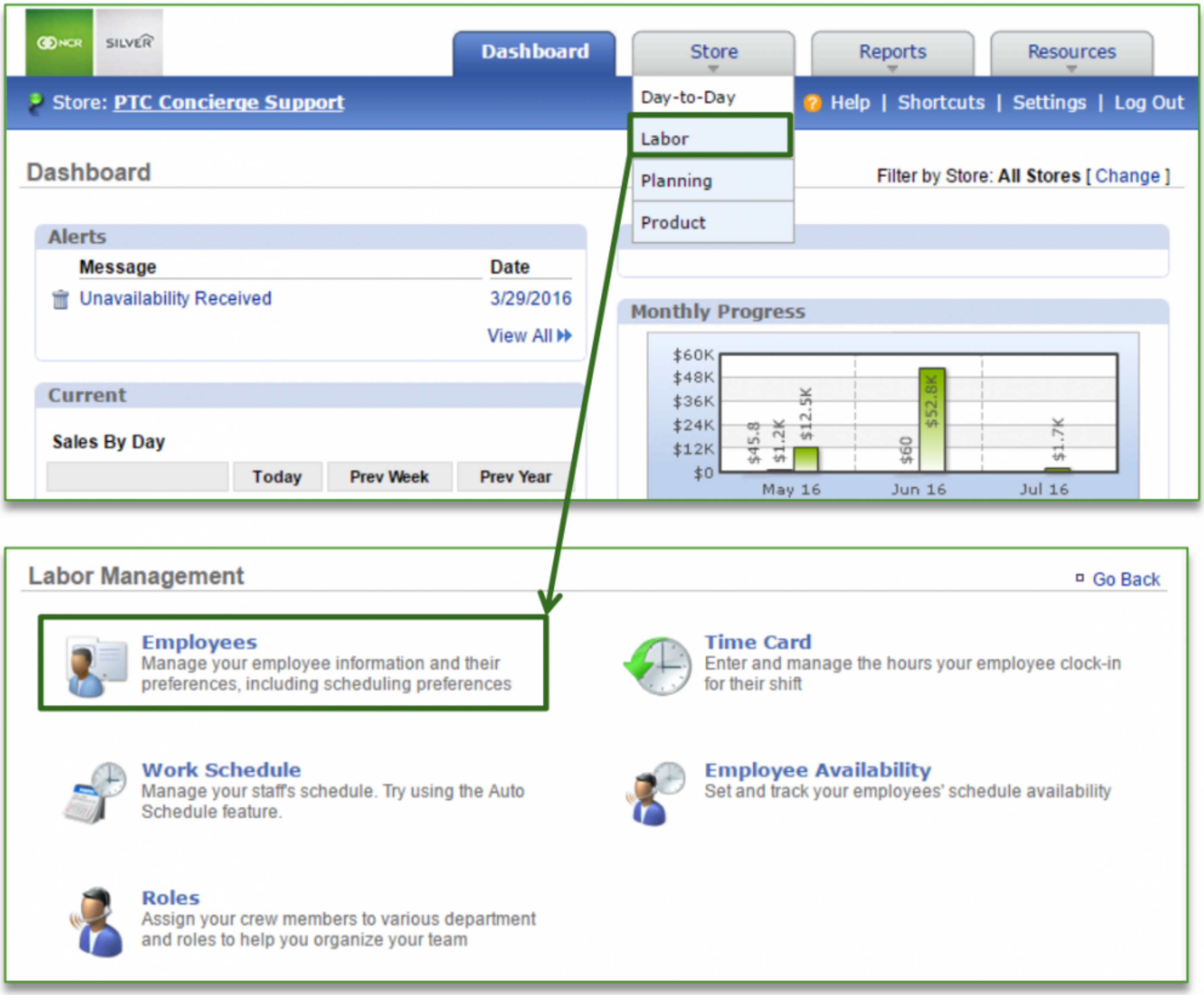
User Permissions

In this module, you will learn:

- How to assign user permissions to an employee
    - Store Management and Employee Portal access
- How to modify user permissions for an employee

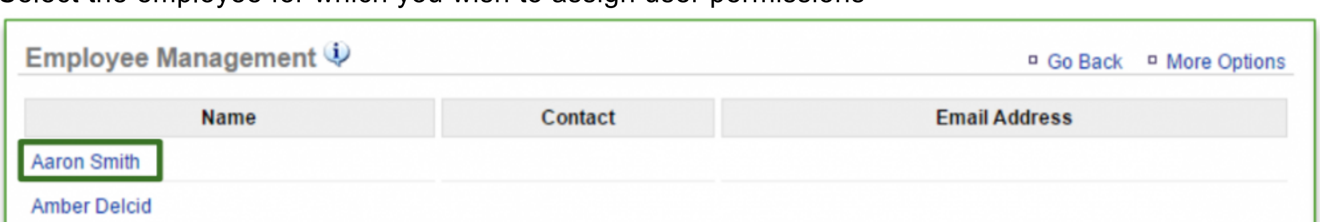
Assigning User Permissions

To assign user permissions to an employee you will need to navigate to the **Labor Management** module and click **Employees**.

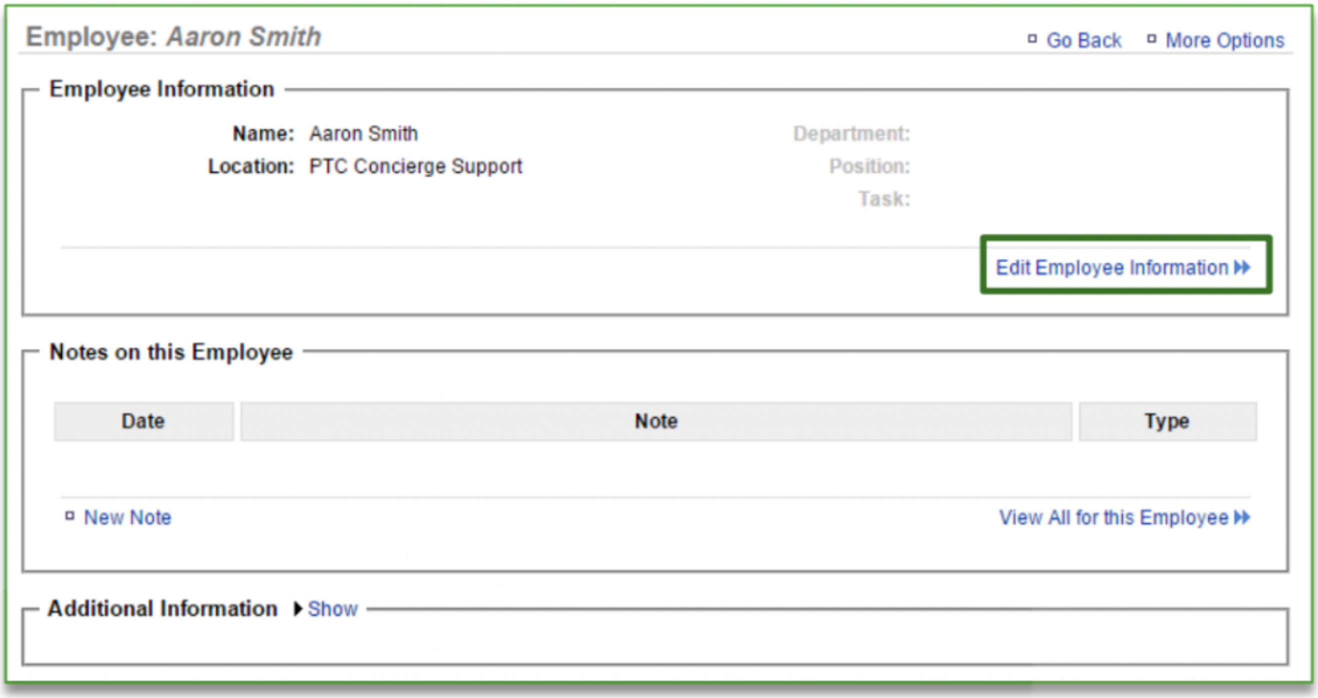


Site Access

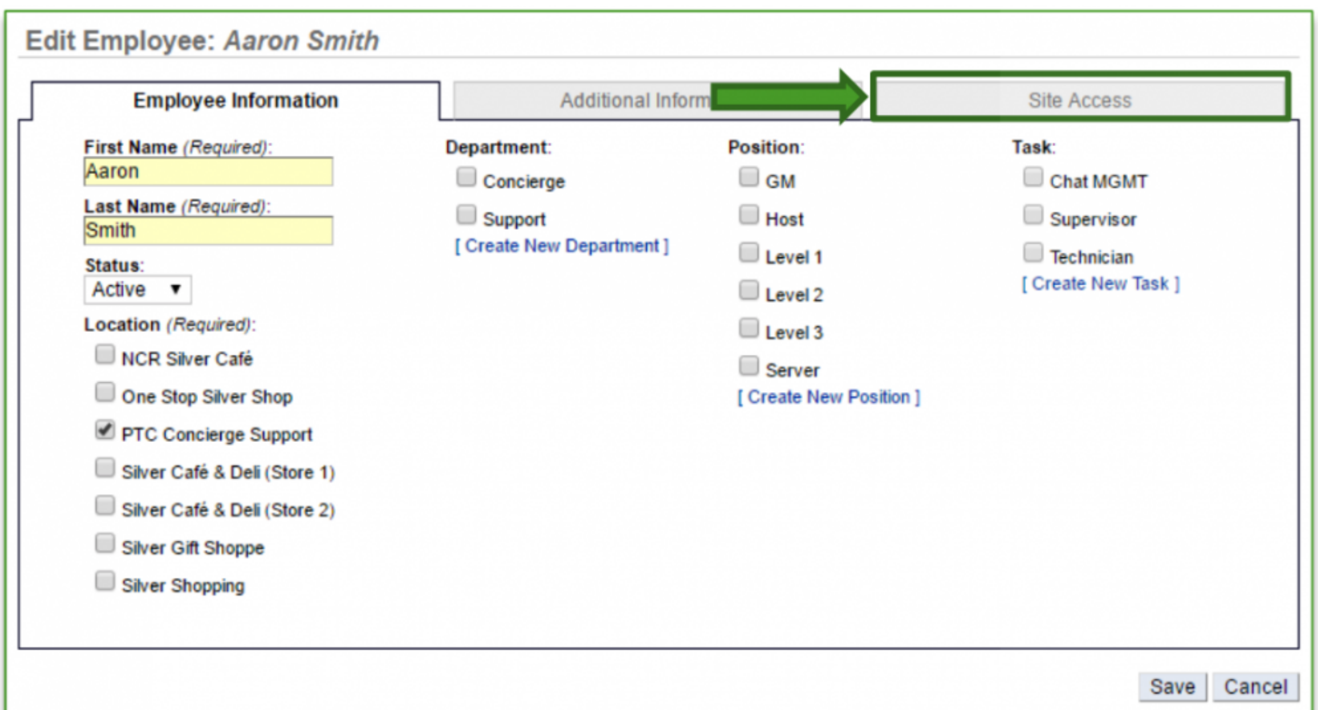
1. Select the employee for which you wish to assign user permissions



2. Click **Edit Employee Information**

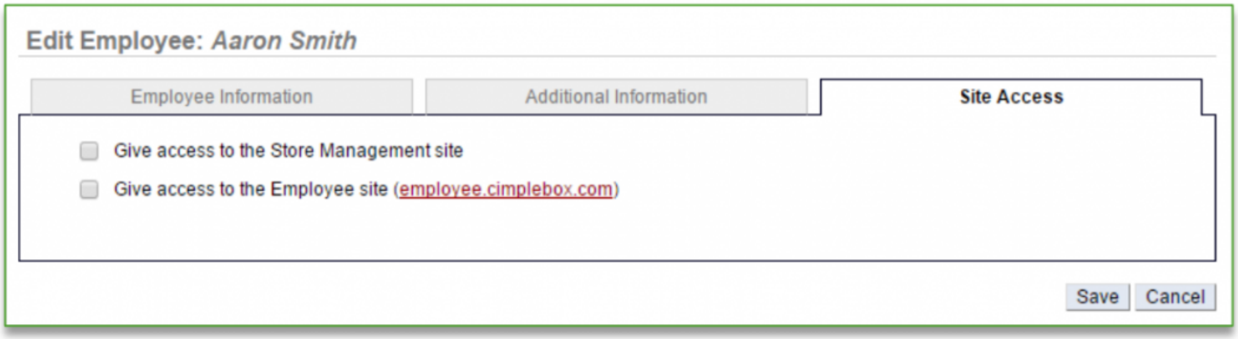


3. Click the **Site Access** tab



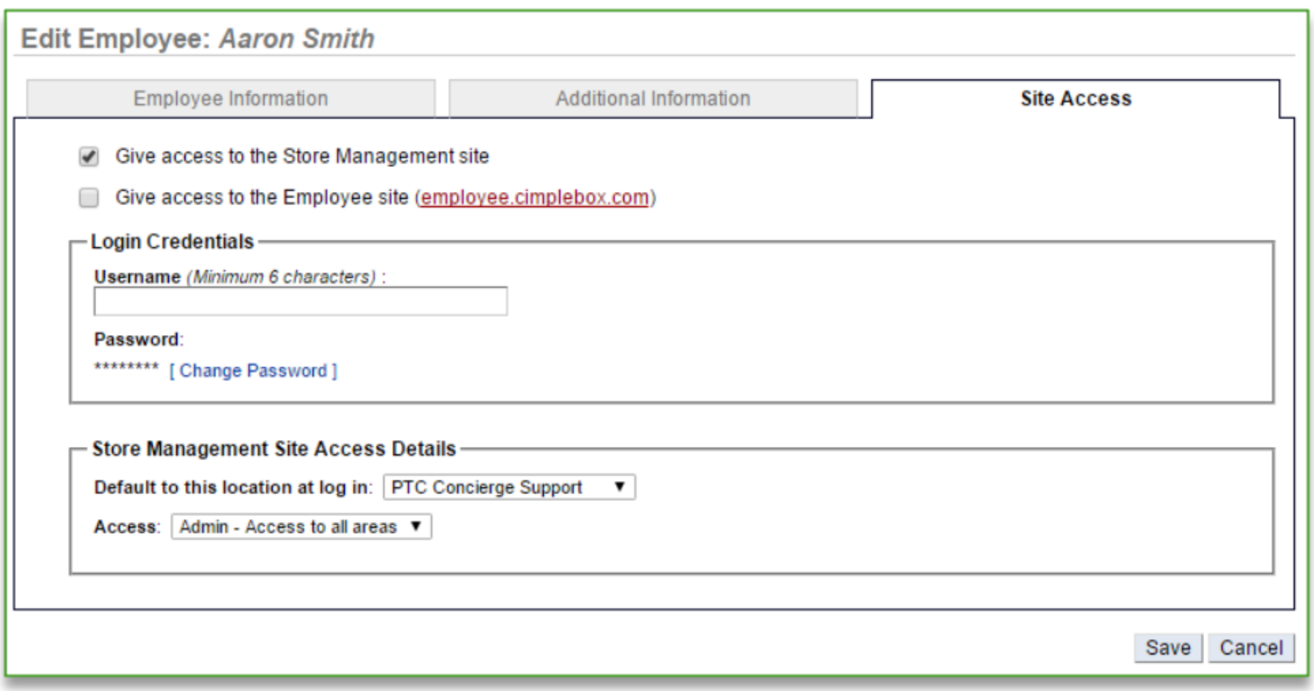
4. You have the option to assign **Store Management** access and/or **Employee Site** access
   a. Store management access gives the user access to https://store.ncrconsole.com

   i. You will have the ability to restrict permissions to adjust what they see under their login
b. Employee site access gives the employee access to the employee portal which provides the following to any user with access to it
   i. Time card information, work schedule, availability portal and training materials (if applicable)
c. Users can be assigned to the Store Management **and** Employee Site



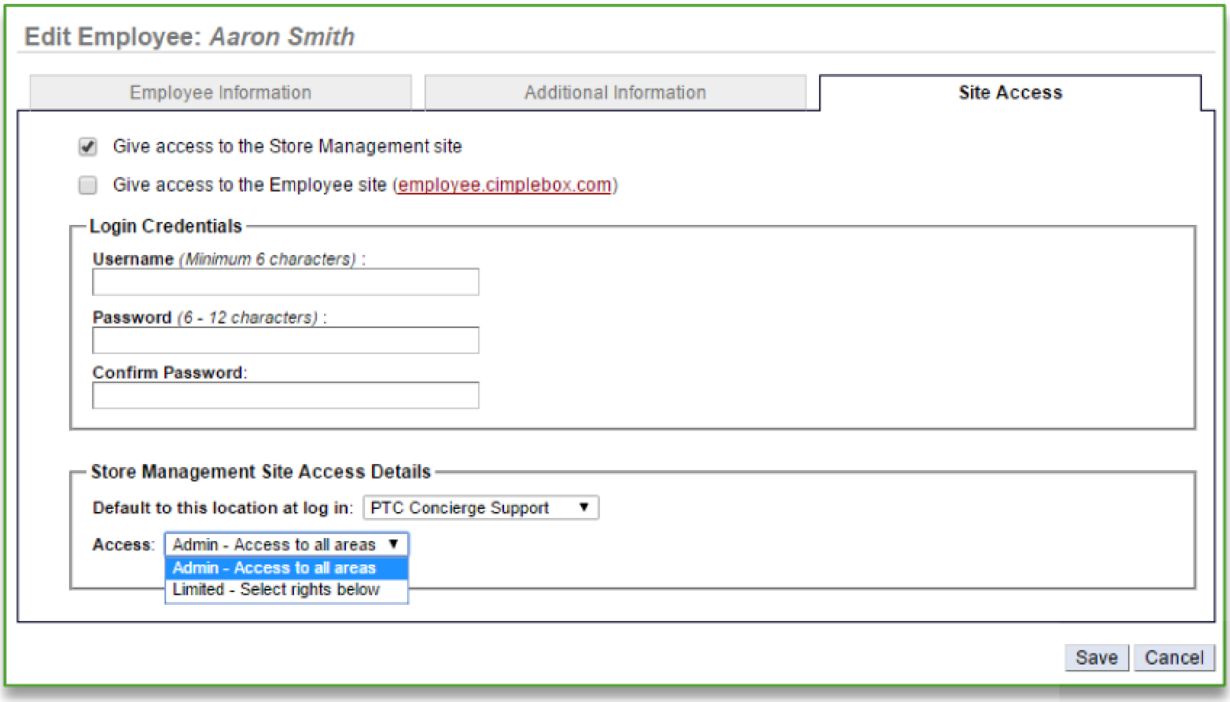
Assigning Access to Store Management

1. Click the **Give access to the Store Management site** option
2. Enter a Username under **Login Credentials** and click **Change Password**

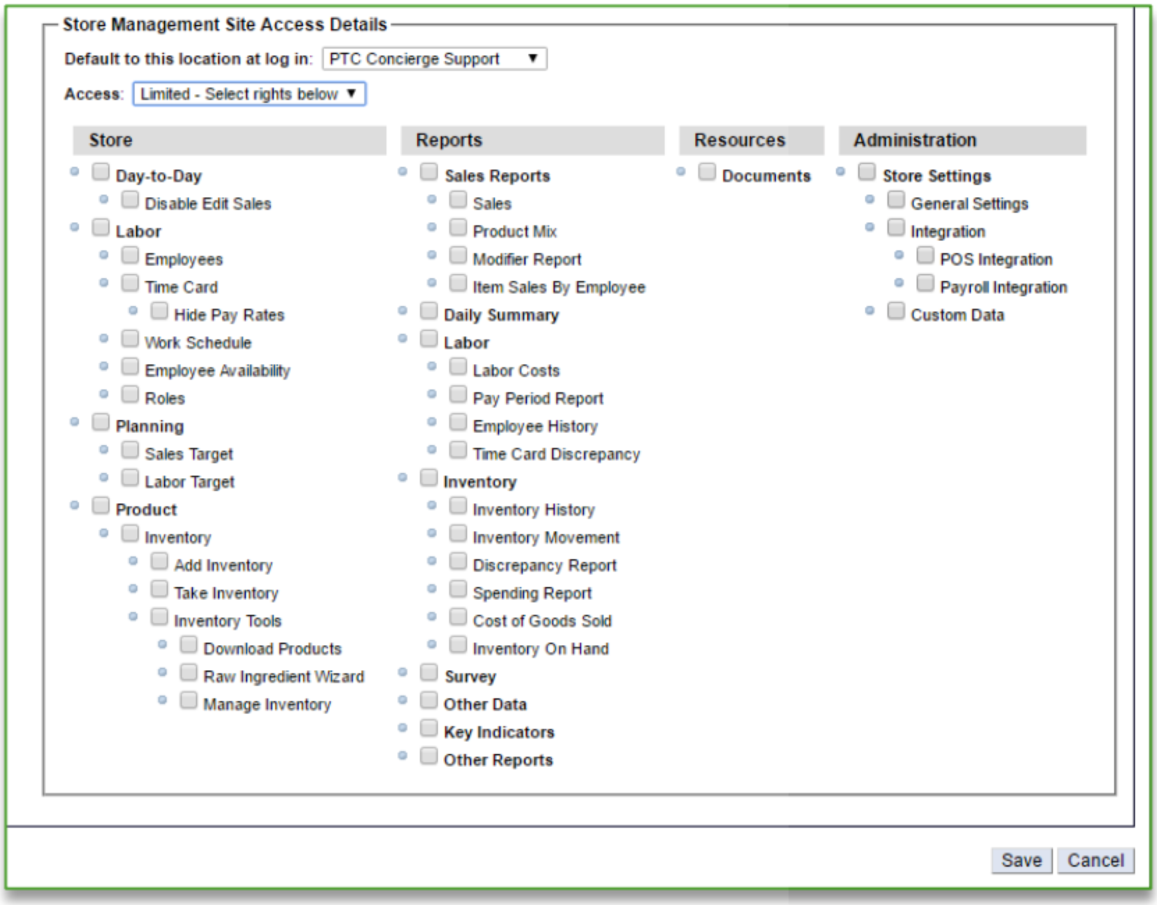


3. Enter password
4. Reenter password to confirm

5. Click the dropdown arrow to the right of **Default to this location at login** (if applicable) to select the location to which the employee (user) is assigned
6. Click the dropdown arrow to the right of **Access**
    a. *Admin* – Provides the user to all areas of the store management site and for all locations
    b. *Limited* – Provides the user to only those areas of the store management site that you assign them to and to the stores they are assigned to



i. If you selected Limited, the window will expand to include additional selection options



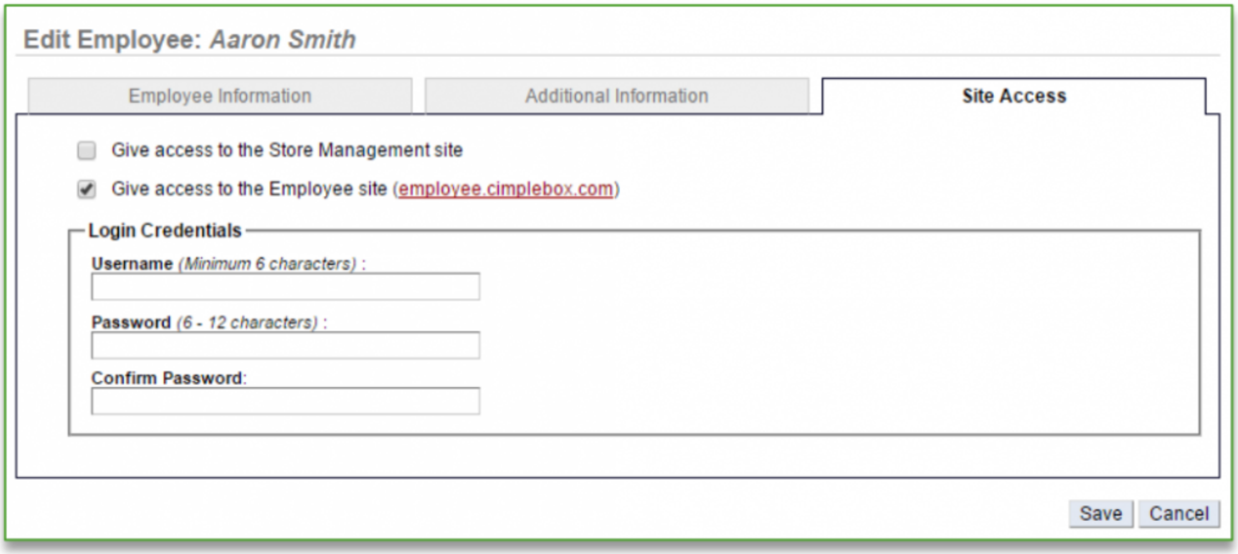
7. Click **Save**
    a. Send the user their login credentials and the applicable URL (*https://store.ncrconsole.com*)
    b. If you have provided the user with access to both sites, they can use the same login credentials

IMPORTANT: If you give a user **Admin** rights to the Store Management site, they will automatically see all information, and for all stores within your network. If you do not want a user to have full admin rights, you must assign them **Limited** access and then select only those items you want them to see.
It is also important that you assign the user to only those locations you wish them to have access to.
If at any time you change a user's permissions *from* an admin to a user with limited rights, you must go back to their employee record to uncheck any additional locations that were previously checked.

Assigning Access to Employee Site

1. Click the **Give access to the Employee site** option

2. Enter a Username under **Login Credentials**
3. Enter password
4. Reenter password to confirm
5. Click **Save**
    a. Send the user their login credentials and the applicable URL (*https://employee.ncrconsole.com*)
    b. If you have provided the user with access to both sites, they can use the same login credentials



Related Topics:

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[Managing Existing Users]

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[Importing Employee Information via the Unrecognized Clock-In Alert]

[Adding Employee Notes]

[Adding Additional Employee Information]

[Roles & Responsibilities]

Employee Availability

This section illustrates how an employee will request time off and how a manager will process those requests. Click on a topic below for more detailed information.

Requesting Time Off
Managing Time Off Requests

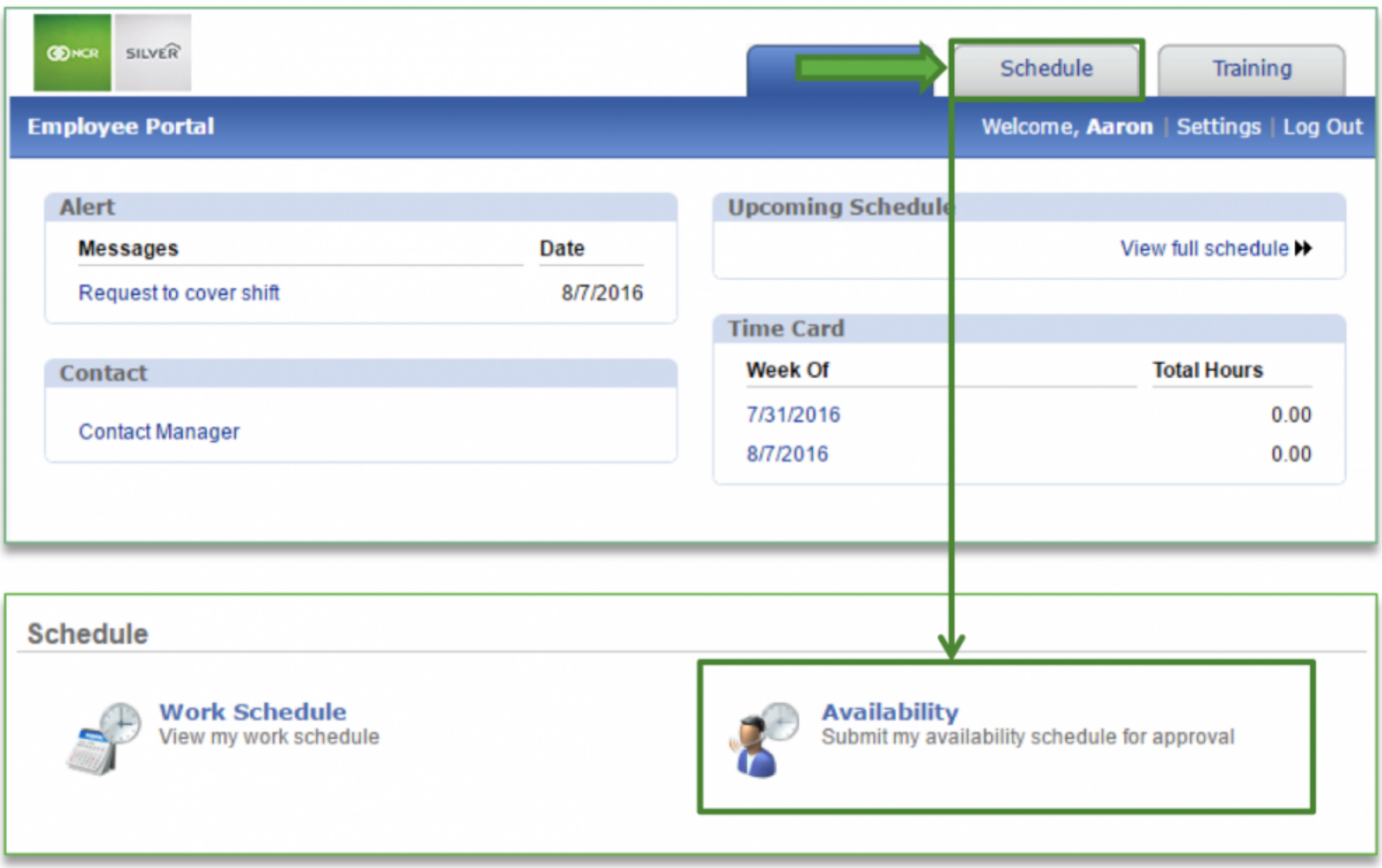
Request Time Off

In this module, you will learn:

- How to request time off

Resting Time Off

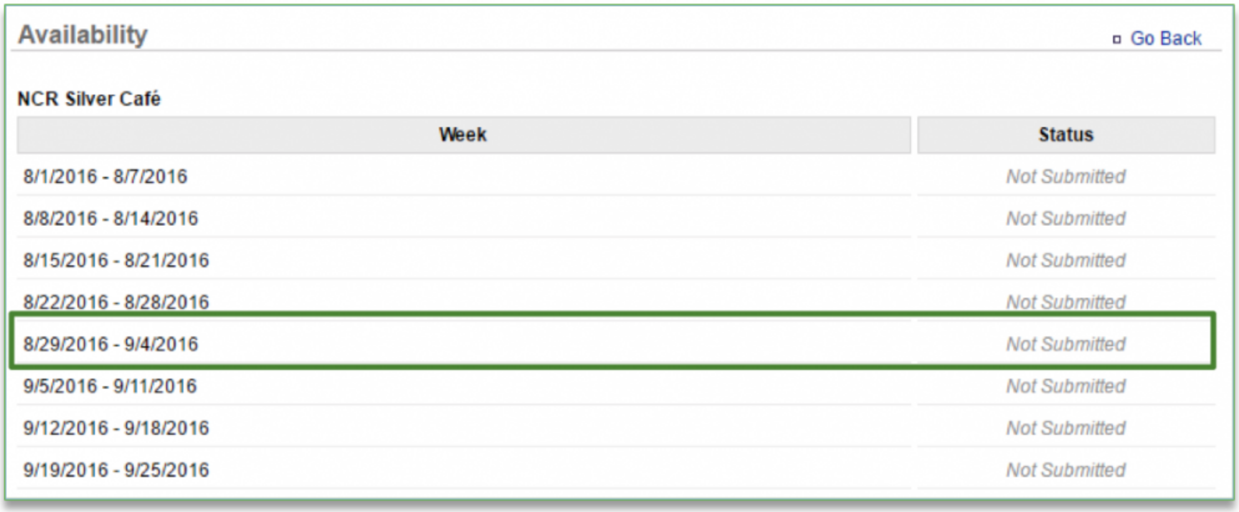
Employees can request time off at any time via the Employee portal (*https://employee.ncrconsole.com*). To request time off the employee will need to click the **Schedule** tab and then **Availability**.



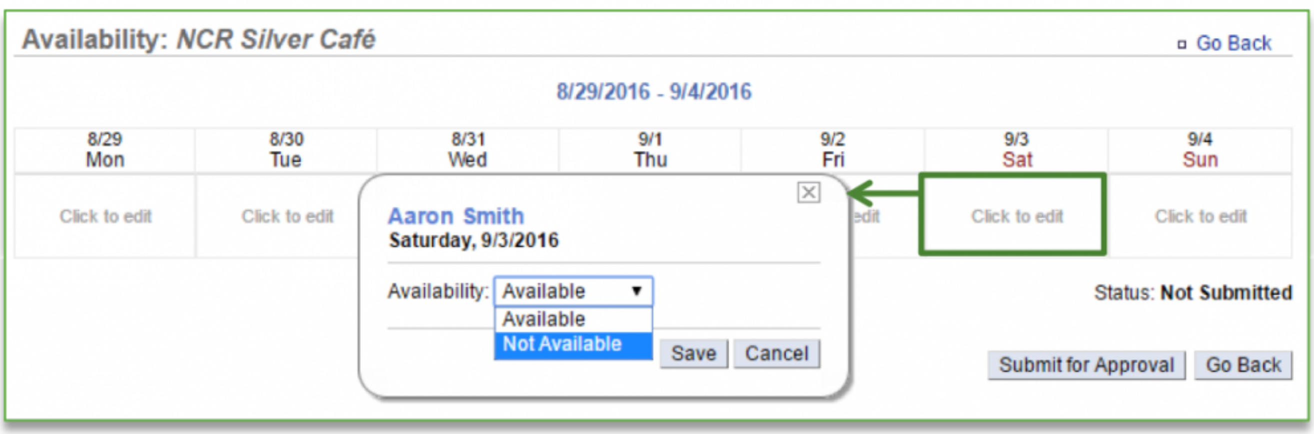
To Submit a Request

1. Select the week that your time off request applies to

   a. Once time off has been submitted, it cannot be retracted or edited

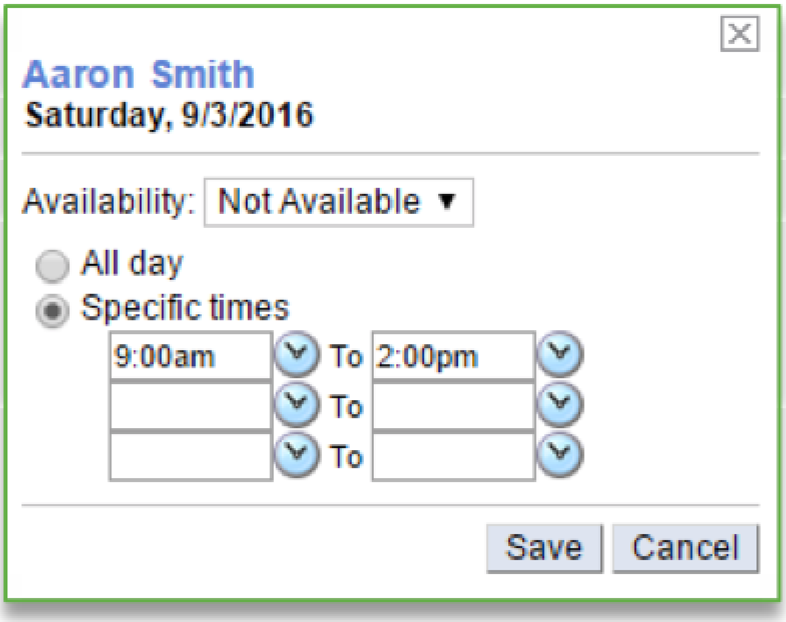


2. Select **Click to edit** for the day you want to submit a time off request for
   a. If there are other days during the week that you need to request time off for, you must submit them all at one time as you will not be able to modify requests for this week once submitted
3. Click the dropdown arrow to the right of **Availability** and select **Not Available**

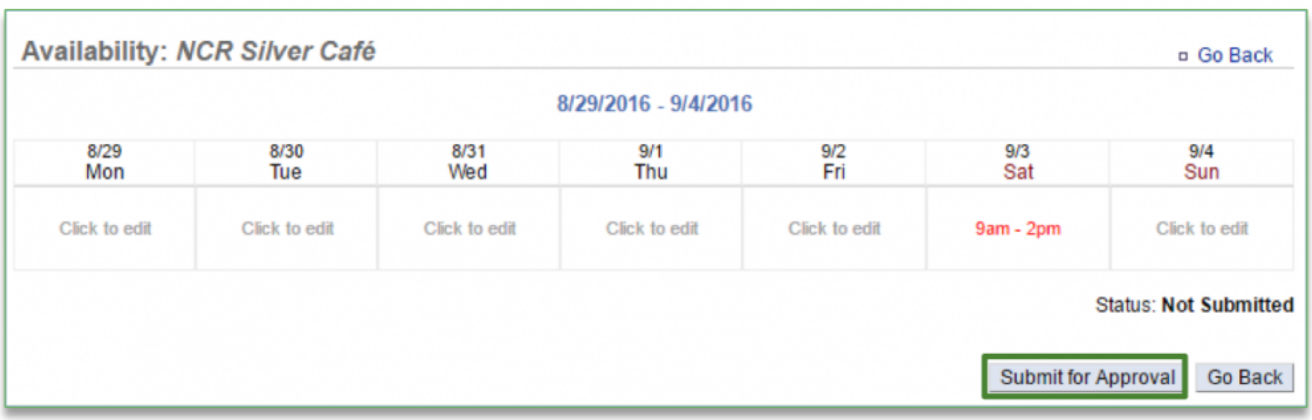


4. Select **All day** or **Specific times**
   a. If you select specific times the window will expand for additional input

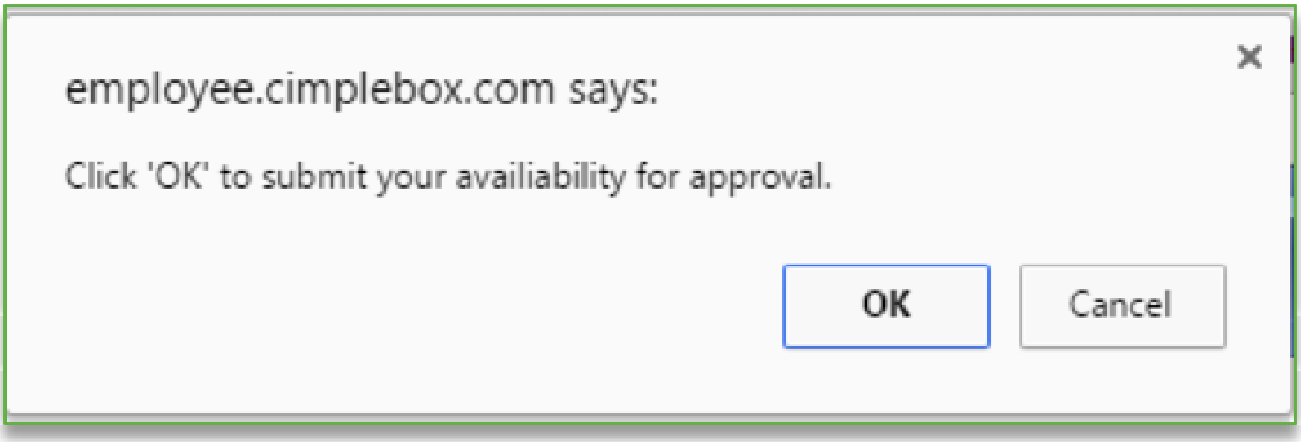
5. Click **Save**



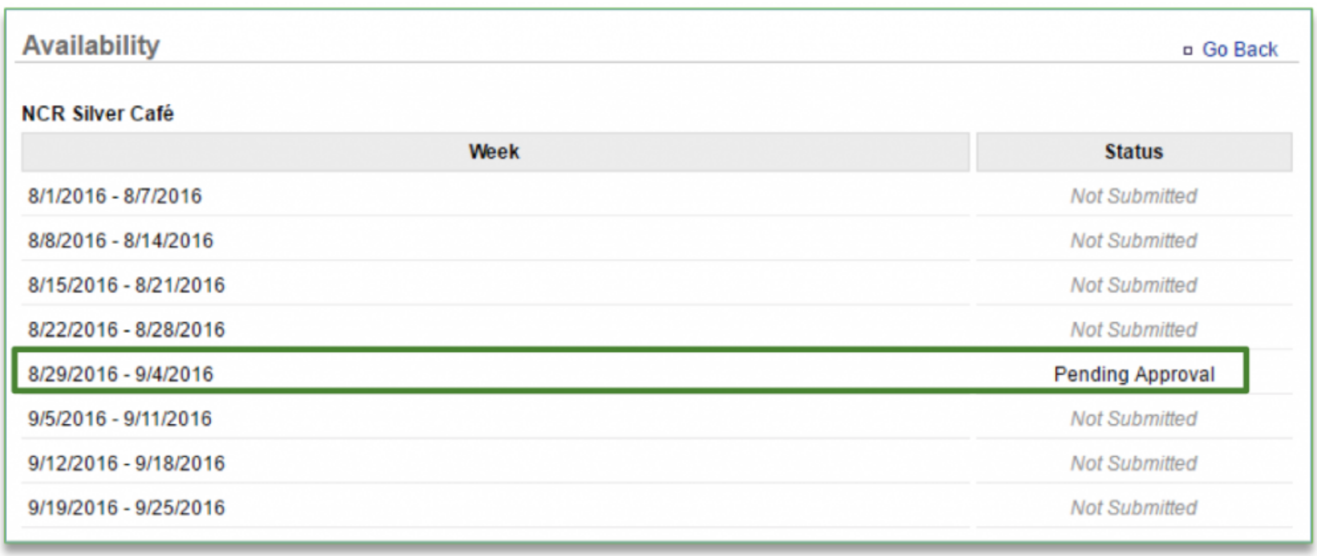
6. Click **Submit for Approval**



7. You will be asked to confirm your submission. Click **OK**



You will see your submission reflected in the Availability portal with a status of **Pending Approval**. If approved, the status will change to **Approved** and will be reflected in the store management work schedule.


Availability
Go Back

NCR Silver Café

Week	Status
8/1/2016 - 8/7/2016	Not Submitted
8/8/2016 - 8/14/2016	Not Submitted
8/15/2016 - 8/21/2016	Not Submitted
8/22/2016 - 8/28/2016	Not Submitted
8/29/2016 - 9/4/2016	Pending Approval
9/5/2016 - 9/11/2016	Not Submitted
9/12/2016 - 9/18/2016	Not Submitted
9/19/2016 - 9/25/2016	Not Submitted

Related Topics:

[Managing Time Off Requests]

Managing Requests

The purpose of this section is to illustrate how a Manager manages time off requests.

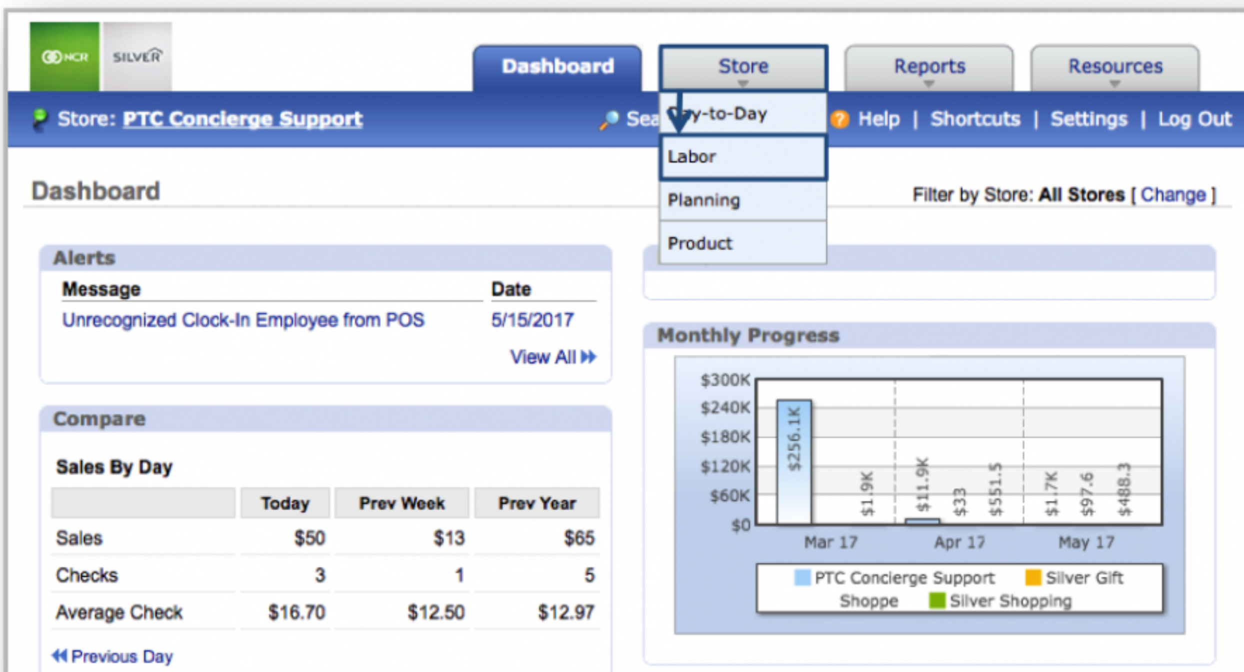
How to Give an Employee Access to Request Time Off

To request time off, employees must first have access to the *Employee* site on CimpleBox (see Step 5 of Permission Setting).

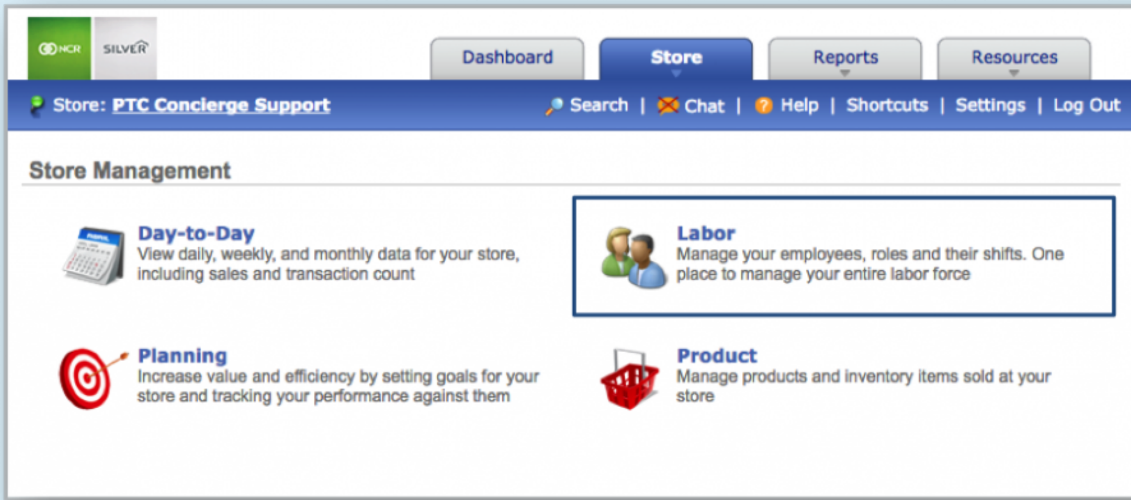
Managing Time Off Requests

Click to see it in action

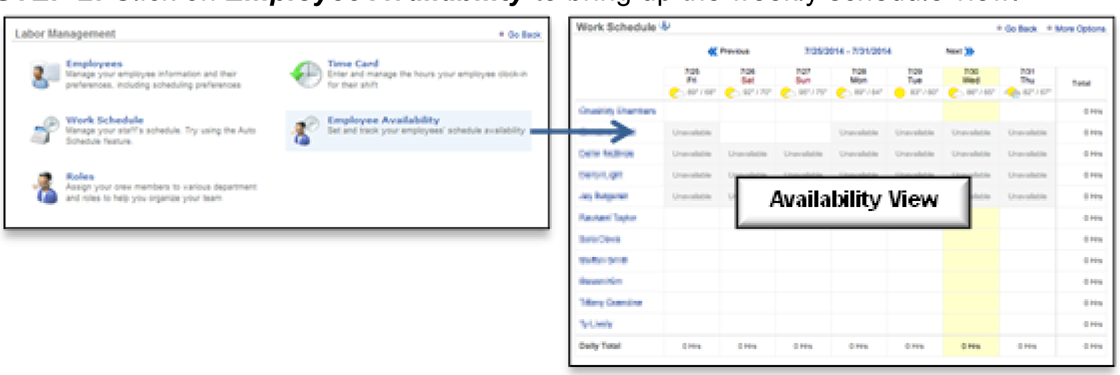
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Labor***.



✻ ***Hint:*** You can also access Labor by clicking on the ***Store*** tab and then on ***Labor*** from the Store Management screen.

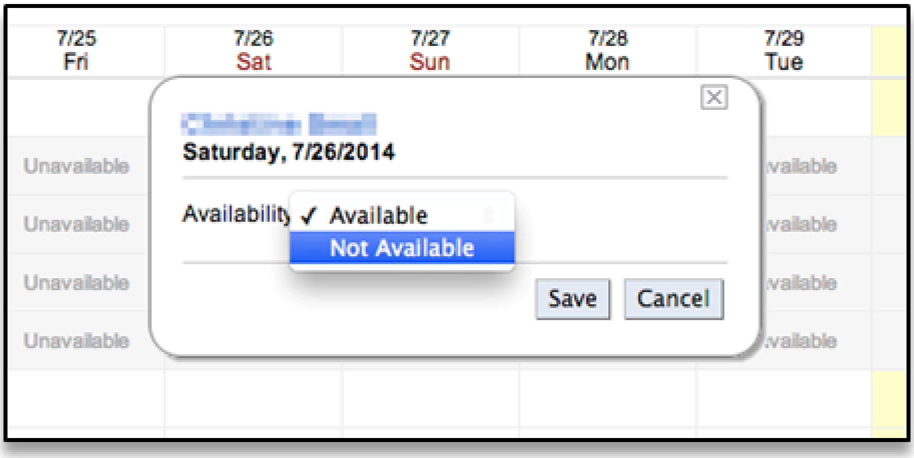


STEP 2: Click on ***Employee Availability*** to bring up the weekly schedule view.

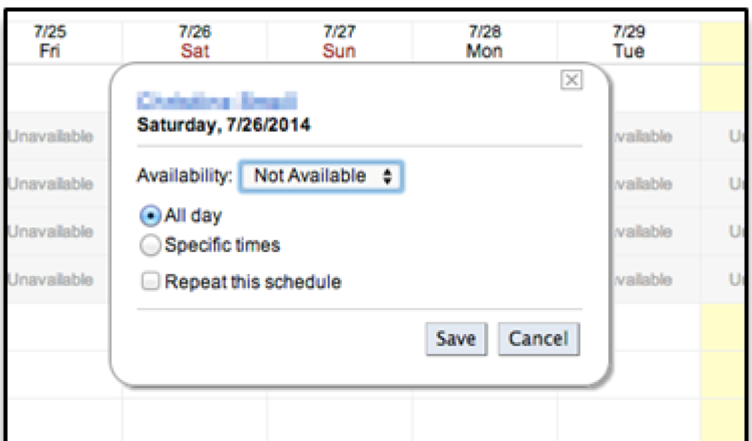


✻ Click the **<< Previous** and **Next >>** links at the top of the page to move from one week to another.

STEP 3: Mouse over to, and click on, the day you wish to adjust availability for.

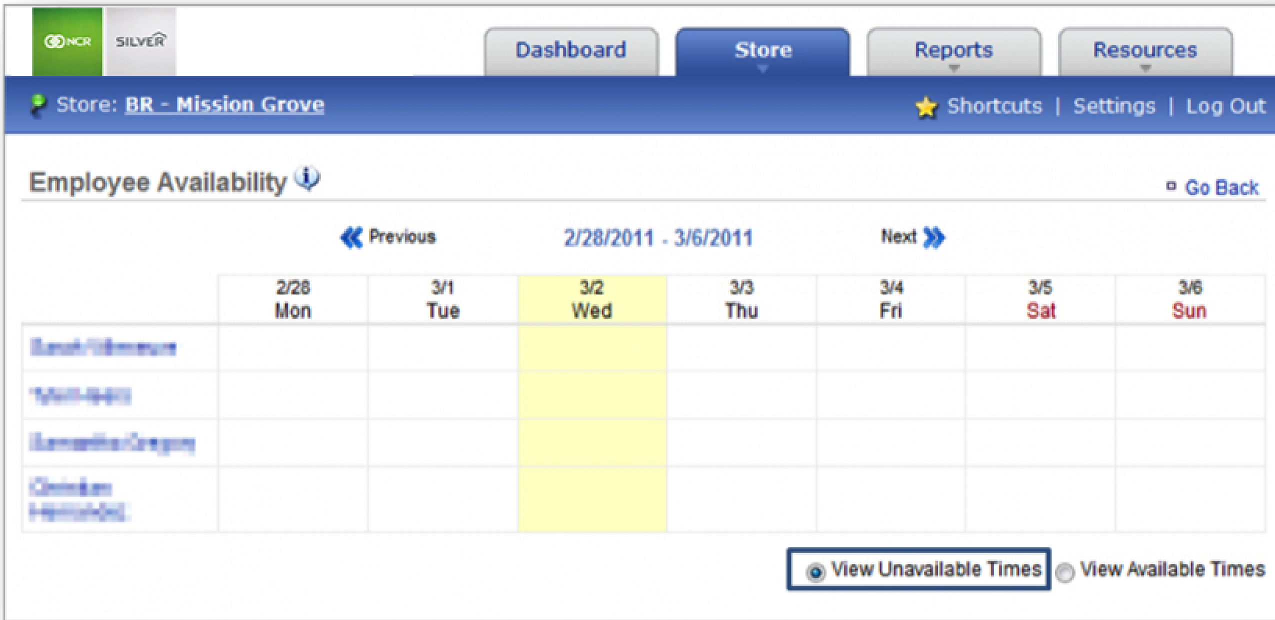


STEP 4: Select ***Available*** or ***Not Available***. You can choose to enter specific times or click ***"All Day"***. Click ***Save*** when done.

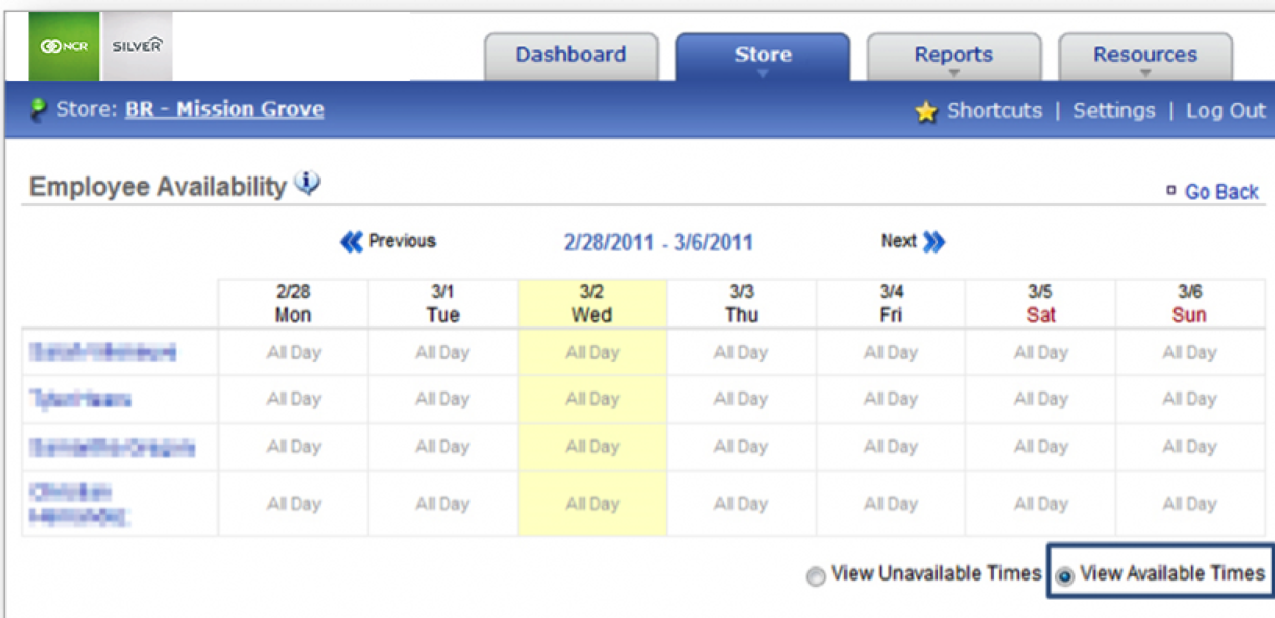


Note: Managers will see, and have the ability to adjust, availability for all employees.

To view employee unavailability, click ***View Unavailable Times*** in the lower right corner.



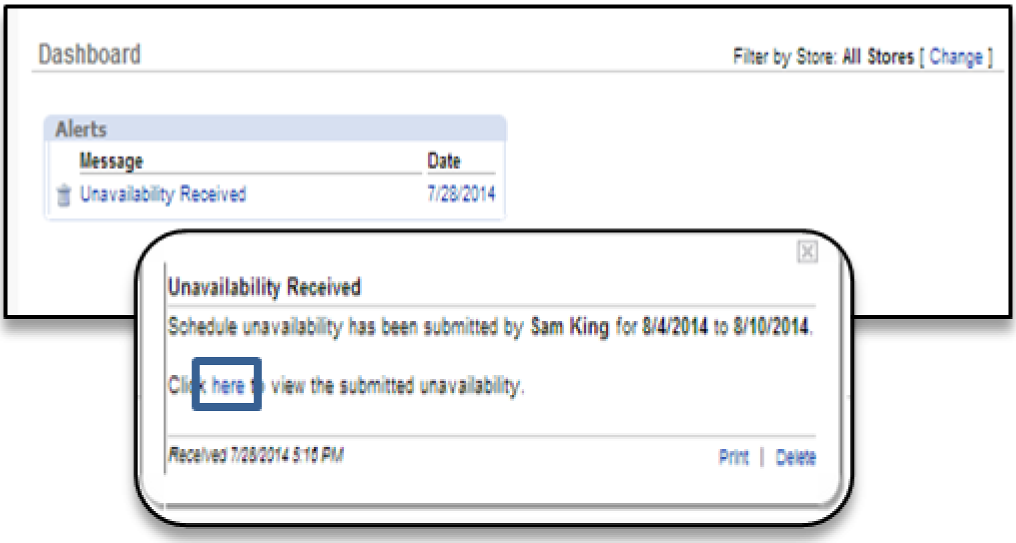
To view employee availability, click ***View Available Times*** in the lower right corner.



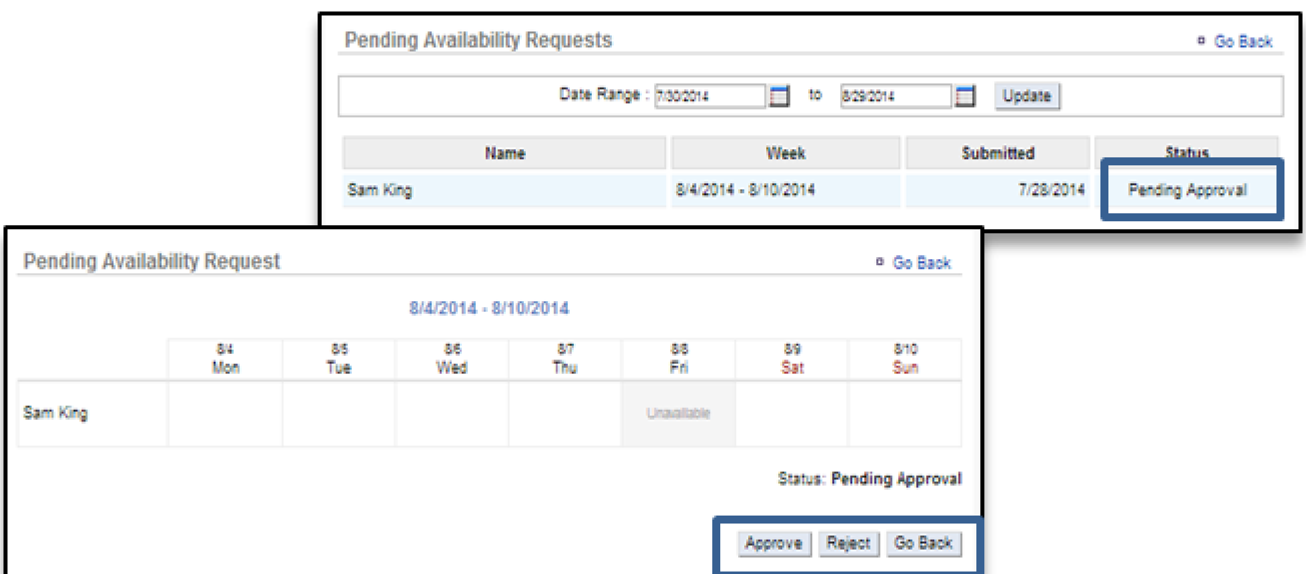
How to Approve Time Off Requests

Click to see it in action

STEP 1: Your employee can submit unavailability (or time off requests) via their own log ins through the *Employee* site. An alert will show up in the *Alerts* box of your Dashboard when they do this. Click on ***Unavailability Received*** to open the message. Click the link within the message to go to the request.



STEP 2: From here, click the ***Pending Approval*** status link to approve or reject the request.



Note: Accepted requests will be automatically reflected on the weekly schedule.

Related Topics:

Requesting Time Off

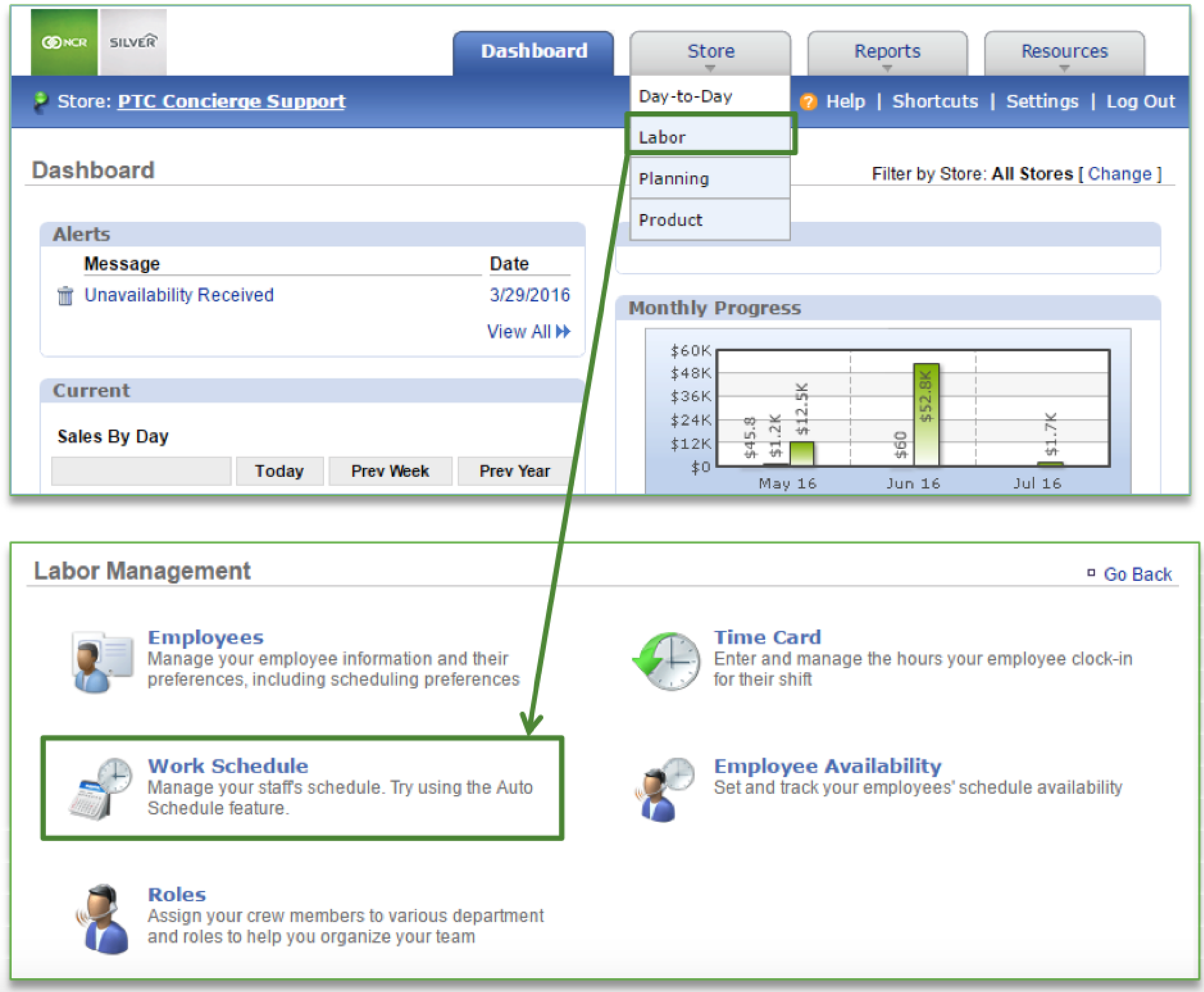
Create a Work Schedule

In this module, you will learn:

- How to create a work schedule within Console

Creating a Work Schedule

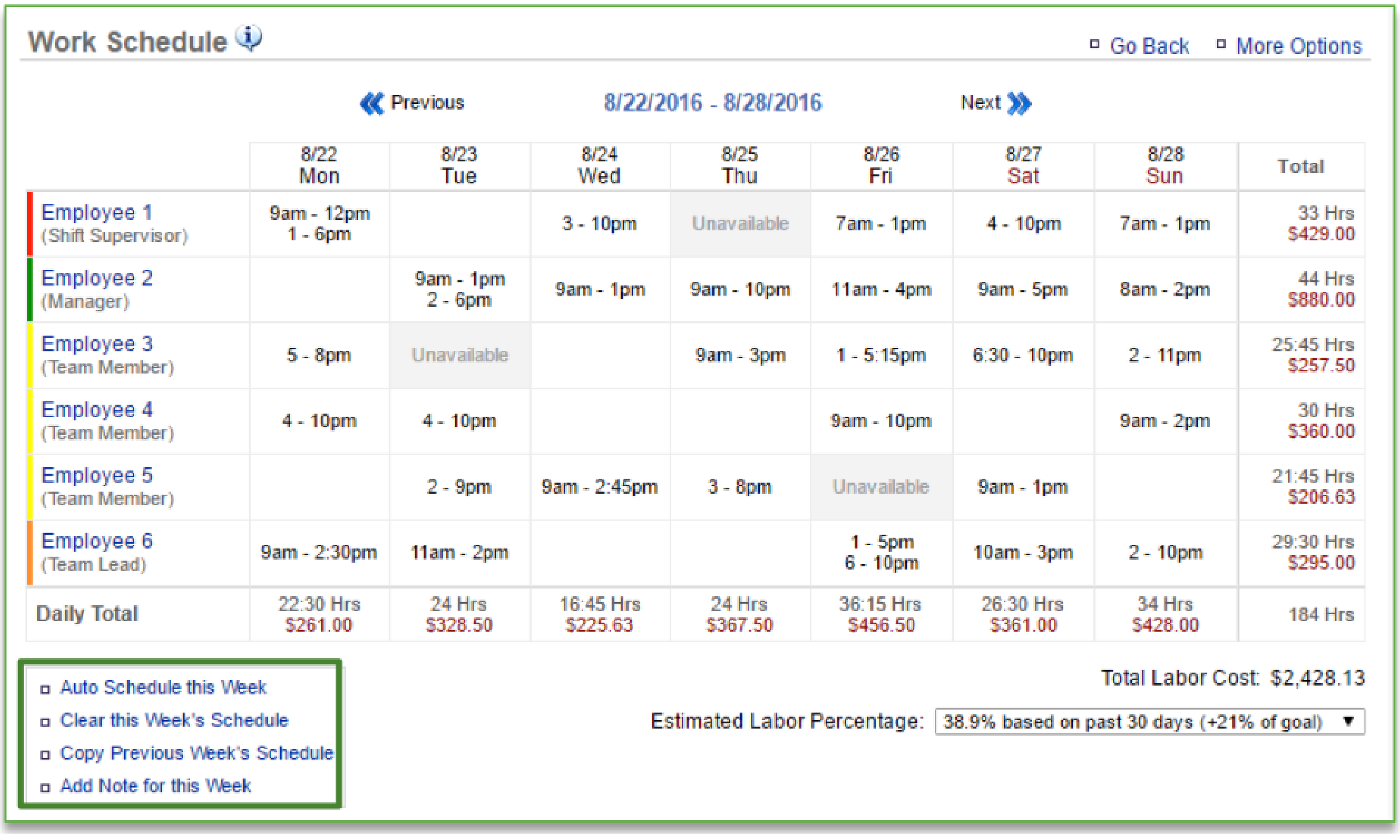
To create a work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.



The **Work Schedule** view defaults to the current week and with any set unavailability showing. If partial unavailability has already been set, you will see it in red when you click on the applicable day.

You will have three options for building a schedule:

- Manual entry (required for the first schedule)
- Copy Previous Week's Schedule
- Auto Schedule the Week (requires at least four previously scheduled consecutive weeks)

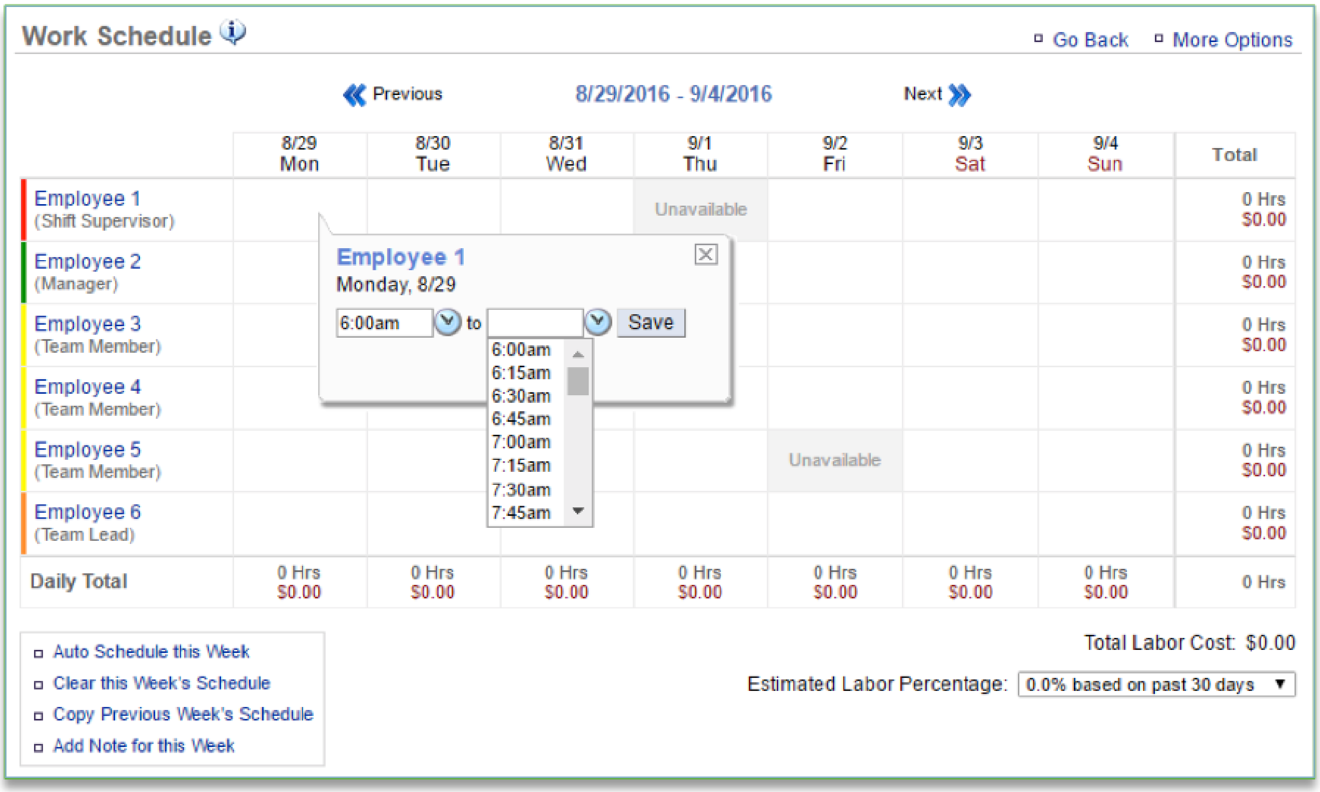


	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat	8/28 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs $429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs $880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs $257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs $360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs $206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs $295.00
Daily Total	22:30 Hrs $261.00	24 Hrs $328.50	16:45 Hrs $225.63	24 Hrs $367.50	36:15 Hrs $456.50	26:30 Hrs $361.00	34 Hrs $428.00	184 Hrs

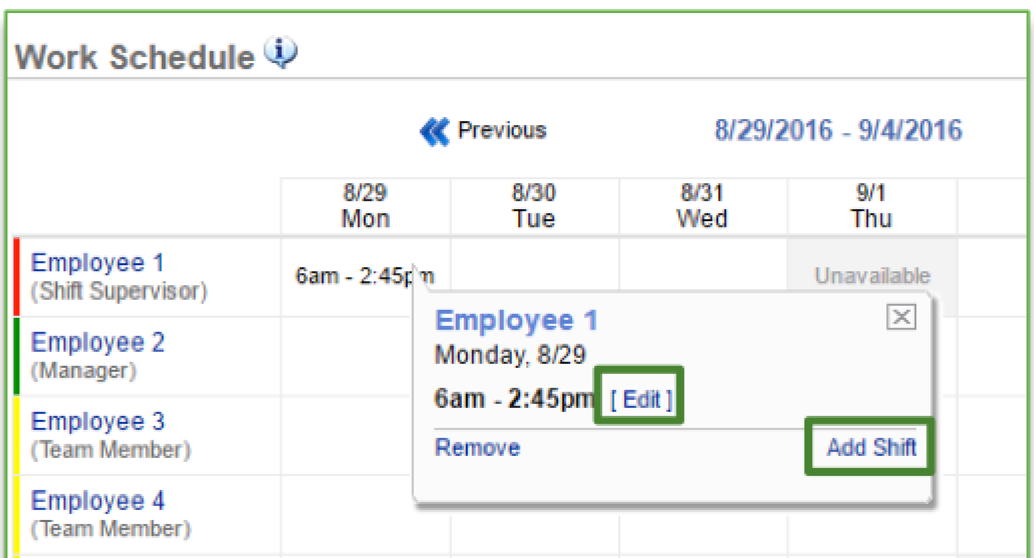
Manually Creating a Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the cell under the day and to the right of the employee that you want to add a shift for
3. Click the dropdown arrows to select the start and end times of the shift
4. Click **Save**

5. Repeat steps 2 and 3 for each employee and for each day they are to be scheduled

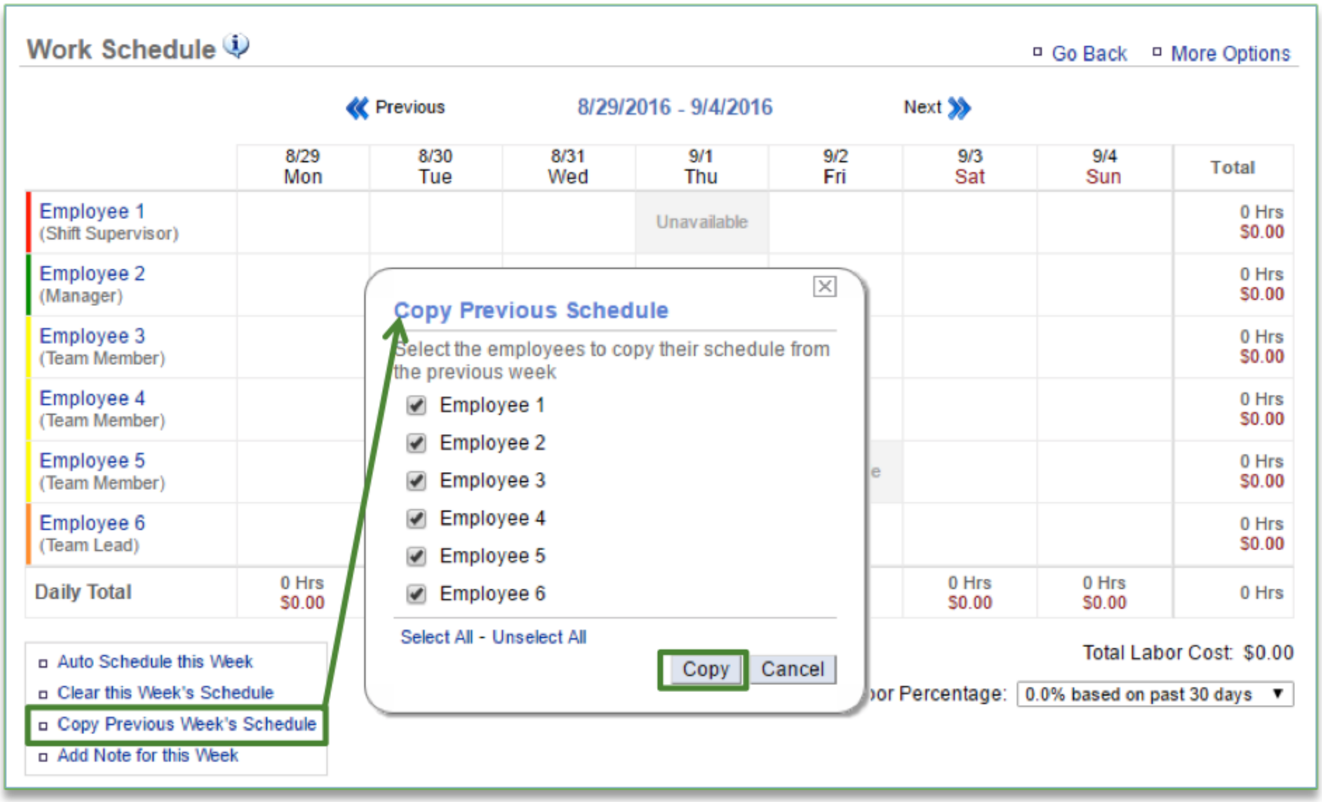


a. You can edit or add a shift to any shift already created by selecting the shift clicking **Edit** or **Add Shift**

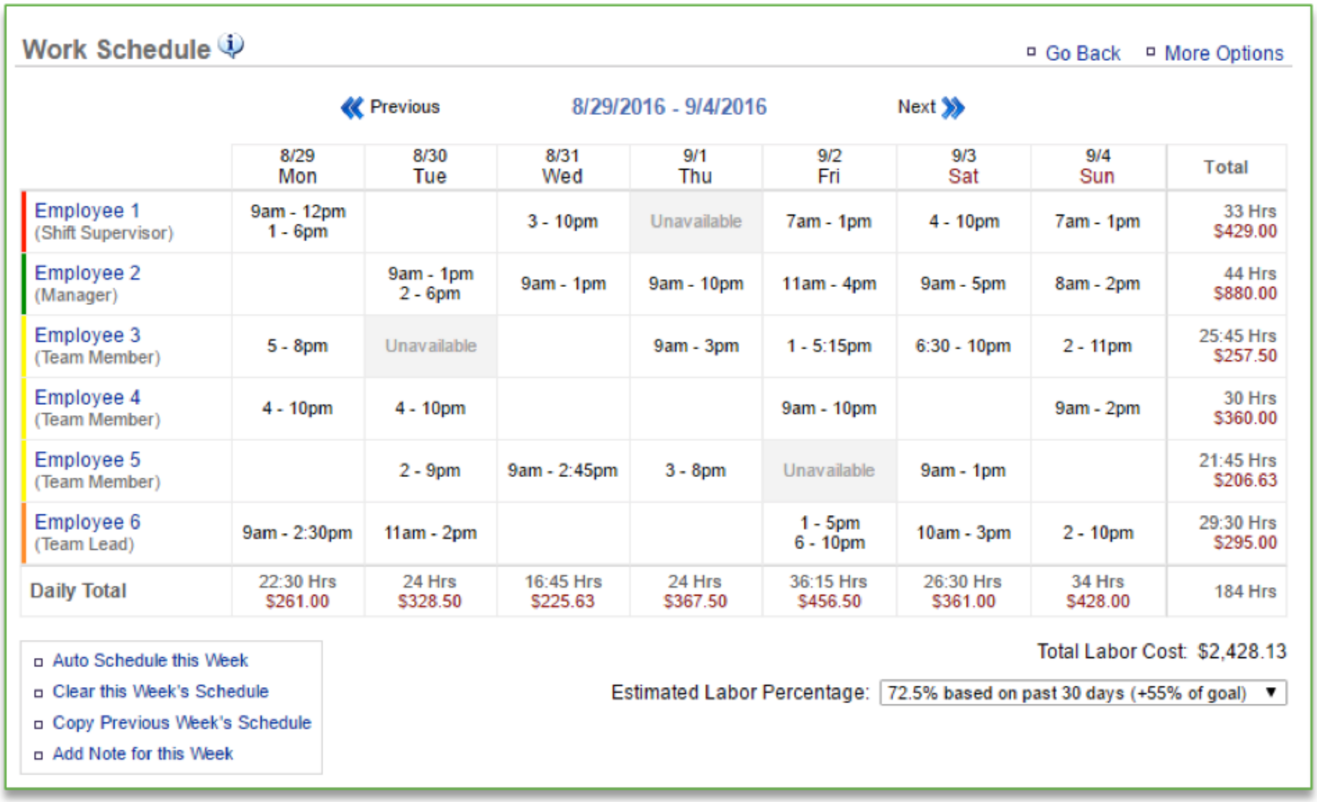


Copying the Prior Week's Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Copy Previous Week's Schedule** link at the bottom left corner of the page
3. Select those employees you wish to copy the schedule for
4. Click **Copy**



5. From here you can make additional edits before finalizing the schedule



Work Schedule

Go Back | More Options

Previous | 8/29/2016 - 9/4/2016 | Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs $429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs $880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs $257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs $360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs $206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs $295.00
Daily Total	22:30 Hrs $261.00	24 Hrs $328.50	16:45 Hrs $225.63	24 Hrs $367.50	36:15 Hrs $456.50	26:30 Hrs $361.00	34 Hrs $428.00	184 Hrs

- Auto Schedule this Week
- Clear this Week's Schedule
- Copy Previous Week's Schedule
- Add Note for this Week

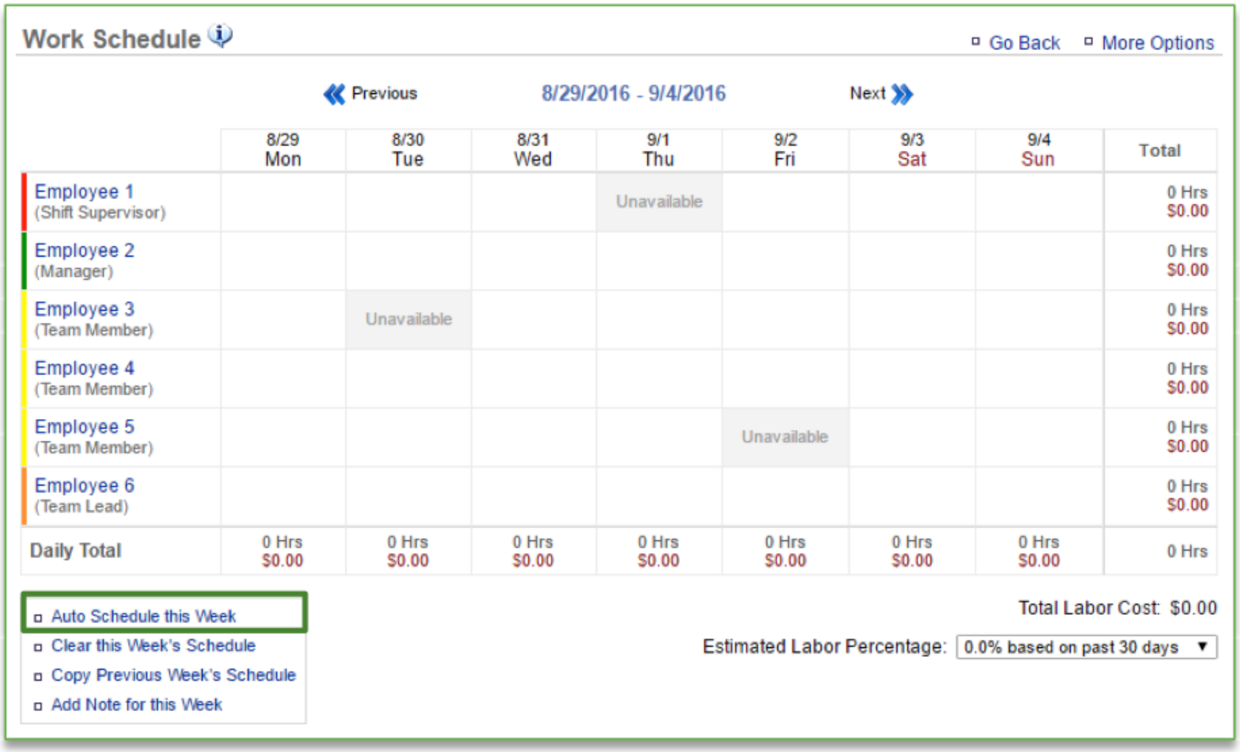
Total Labor Cost: $2,428.13

Estimated Labor Percentage: 72.5% based on past 30 days (+55% of goal)

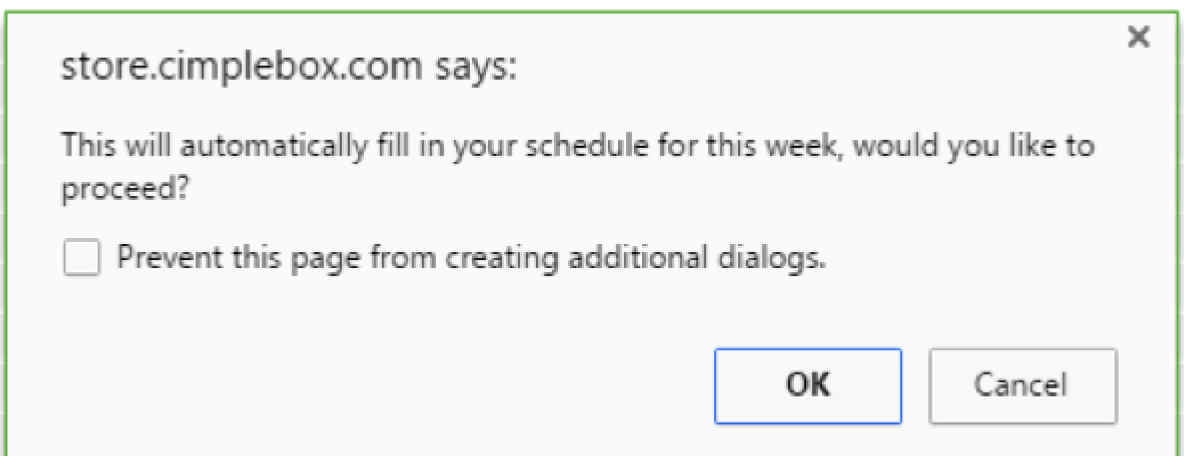
Auto Schedule a Week

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Auto Schedule this Week** link at the bottom left corner of the page

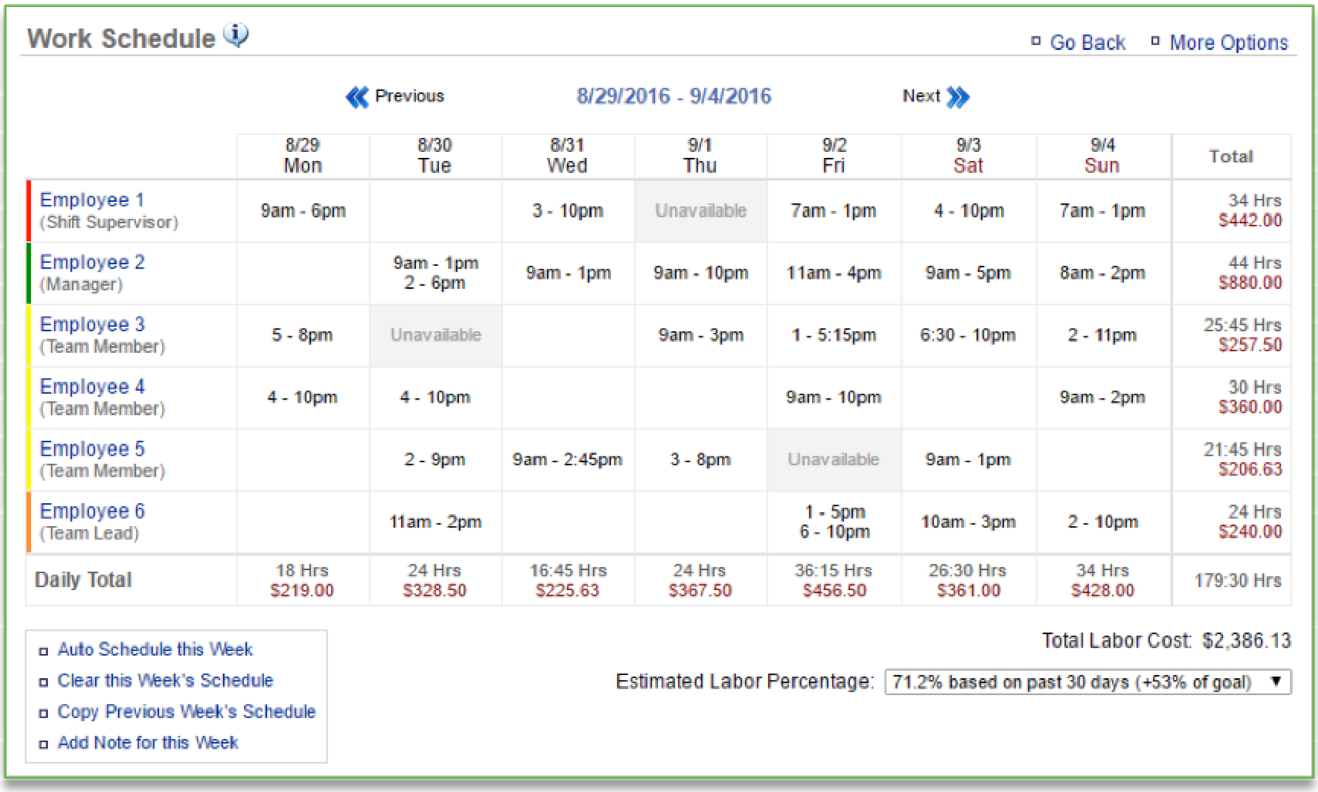
a. Keep in mind that you must have a least four schedules in the system before it will allow you to auto schedule



3. You will be asked to confirm your choice. Click **OK**



4. From here you can make additional edits before finalizing the schedule



Work Schedule

Go Back | More Options

Previous | 8/29/2016 - 9/4/2016 | Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	34 Hrs $442.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs $880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs $257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs $360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs $206.63
Employee 6 (Team Lead)		11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	24 Hrs $240.00
Daily Total	18 Hrs $219.00	24 Hrs $328.50	16:45 Hrs $225.63	24 Hrs $367.50	36:15 Hrs $456.50	26:30 Hrs $361.00	34 Hrs $428.00	179:30 Hrs

- Auto Schedule this Week
- Clear this Week's Schedule
- Copy Previous Week's Schedule
- Add Note for this Week

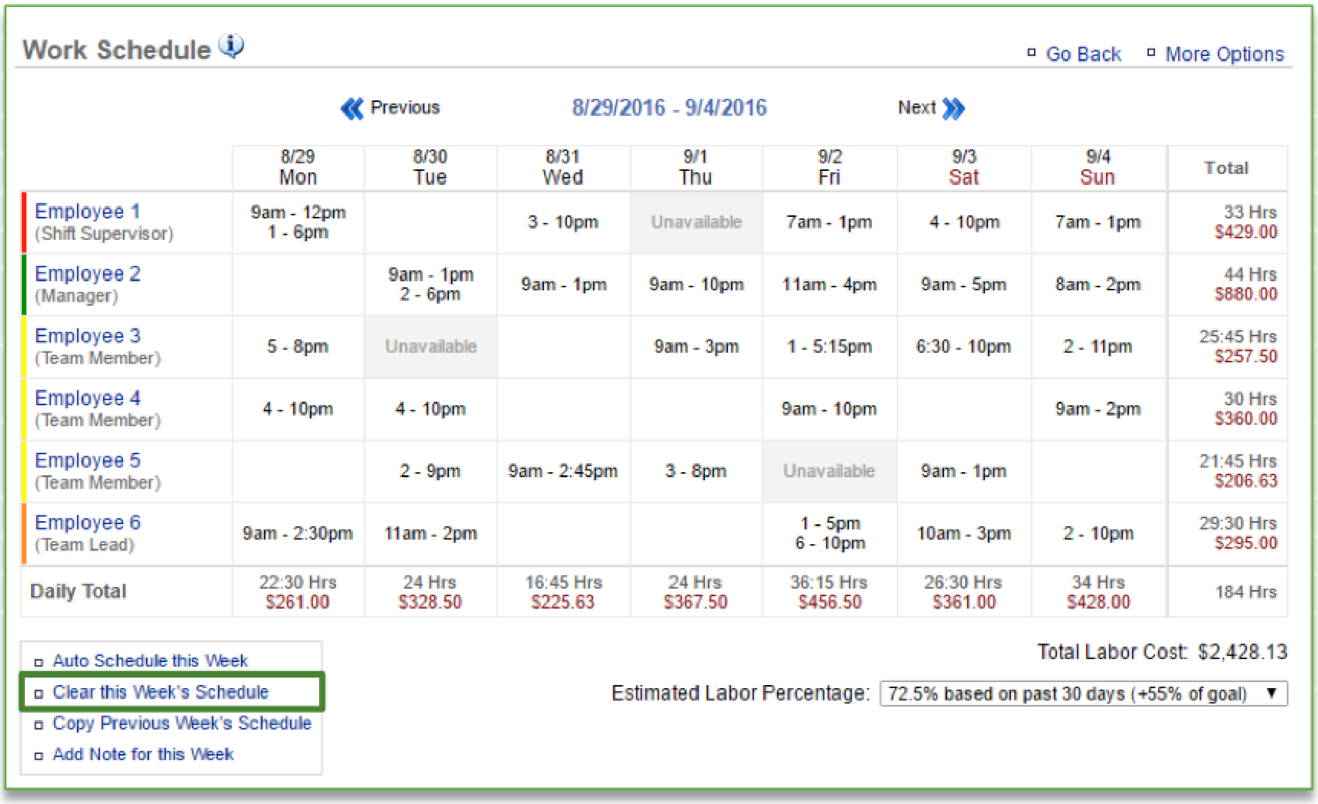
Total Labor Cost: $2,386.13

Estimated Labor Percentage: 71.2% based on past 30 days (+53% of goal)

Clearing a Schedule

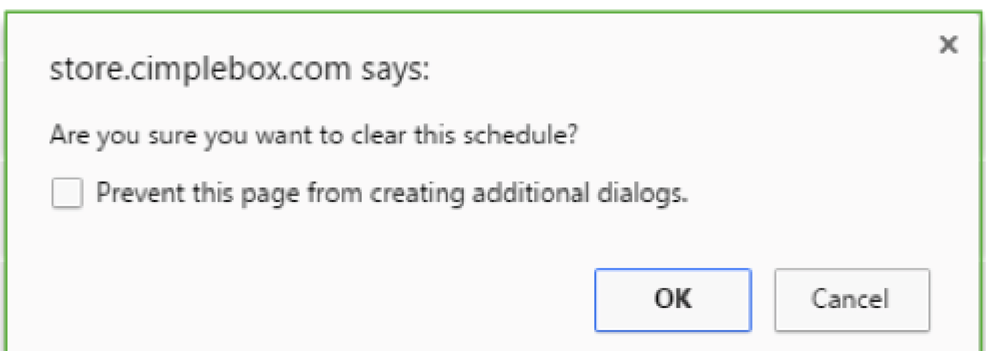
You can clear a schedule at any time before it has been finalized. To clear a schedule:

1. Click the **Clear this Week's Schedule** link at the bottom left corner of the page

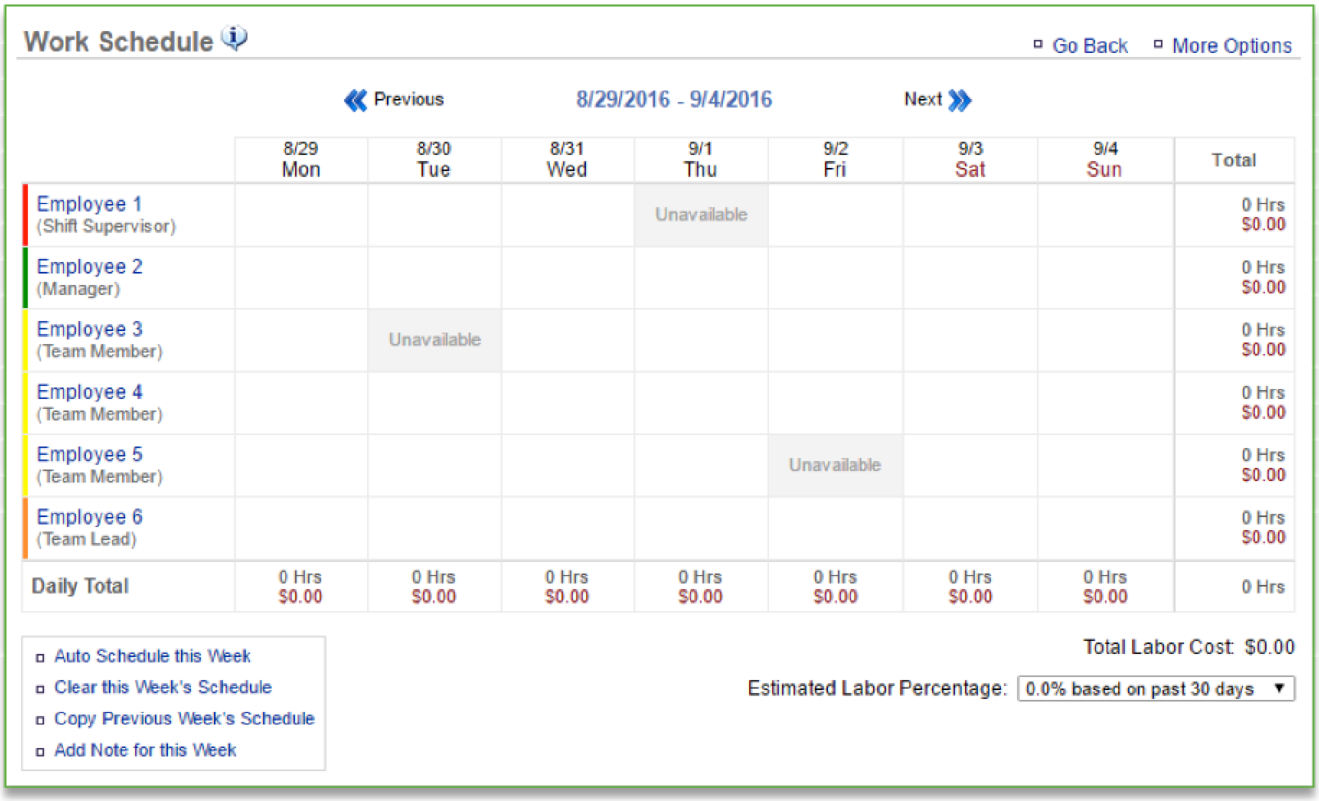


	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs $429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs $880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs $257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs $360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs $206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs $295.00
Daily Total	22:30 Hrs $261.00	24 Hrs $328.50	16:45 Hrs $225.63	24 Hrs $367.50	36:15 Hrs $456.50	26:30 Hrs $361.00	34 Hrs $428.00	184 Hrs

2. You will be asked to confirm your choice. Click **OK**



3. The schedule will be reset to a blank schedule reflecting only set unavailability



Related Topics:

[Add a Note for Current Week]

[Communicating Work Schedules]

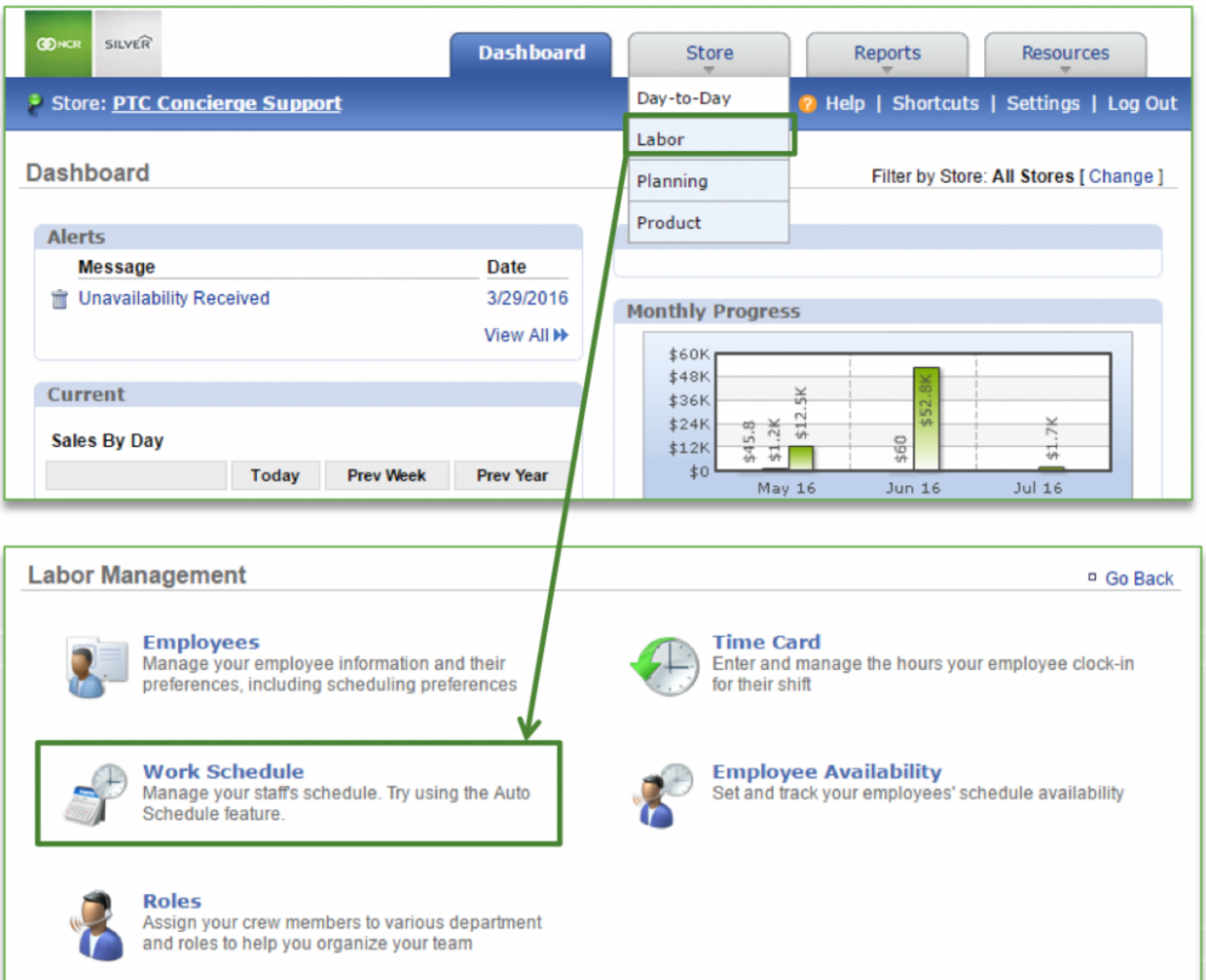
Add Note for Current Week

In this module, you will learn:

- How to add a note to the work schedule within Console

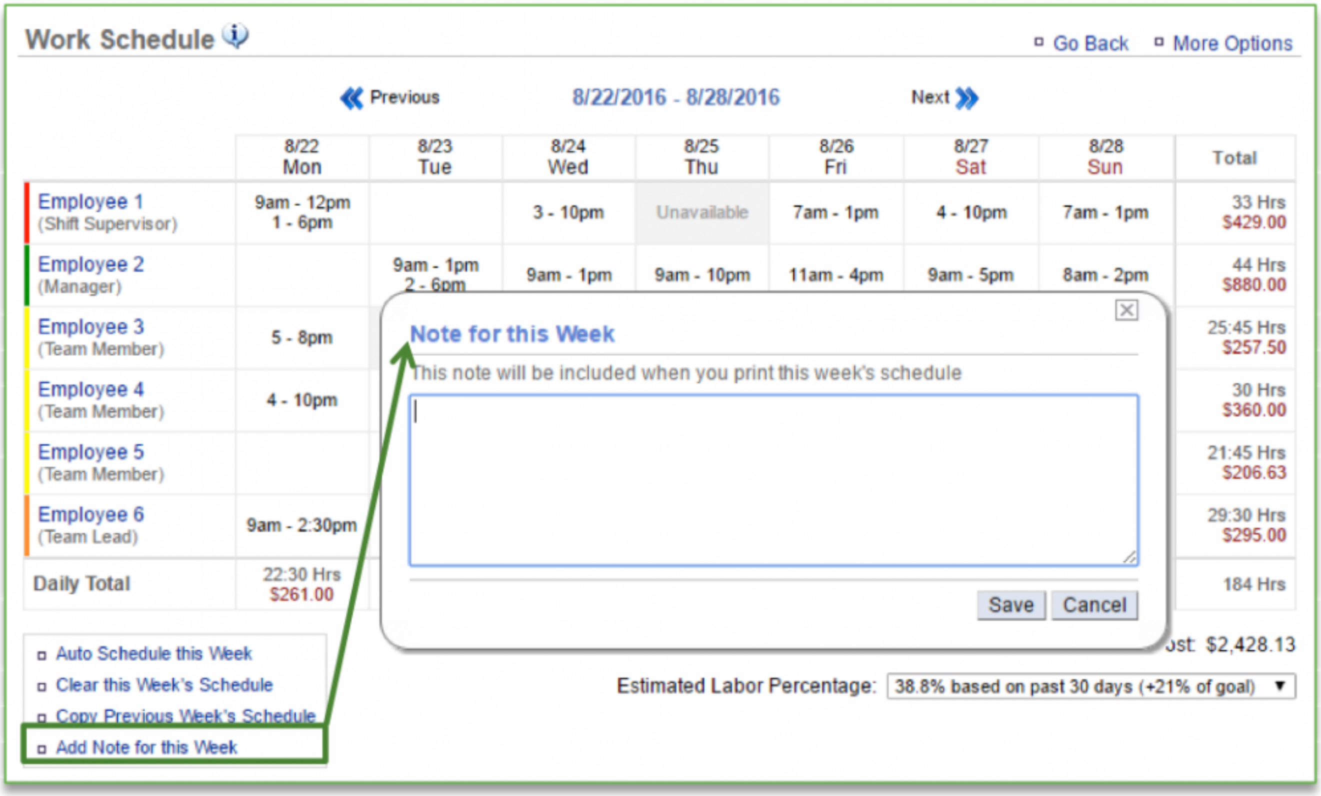
Adding a Note to the Work Schedule

To add a note to the work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.



To Add a Note to the Work Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Add Note for this Week** link at the bottom left corner of the page
3. Enter the desired message in the floating window that appears
    a. The message will appear on any printed work schedule
4. Click **Save**



Related Topics:

[Creating a Work Schedule]

[Communicating Schedules]

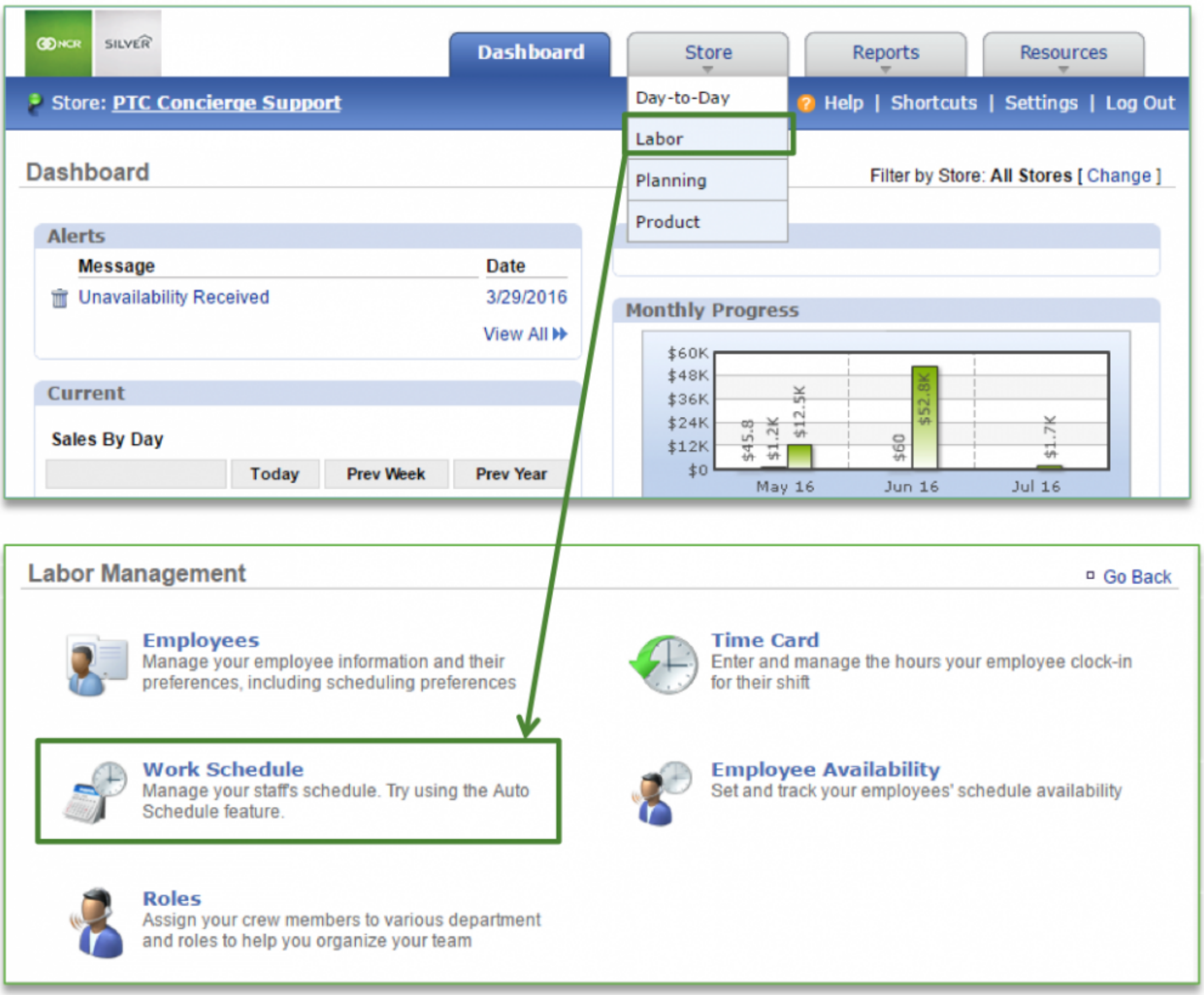
Communicating Schedules

In this module, you will learn:

- How to communicate finalized work schedules within Console

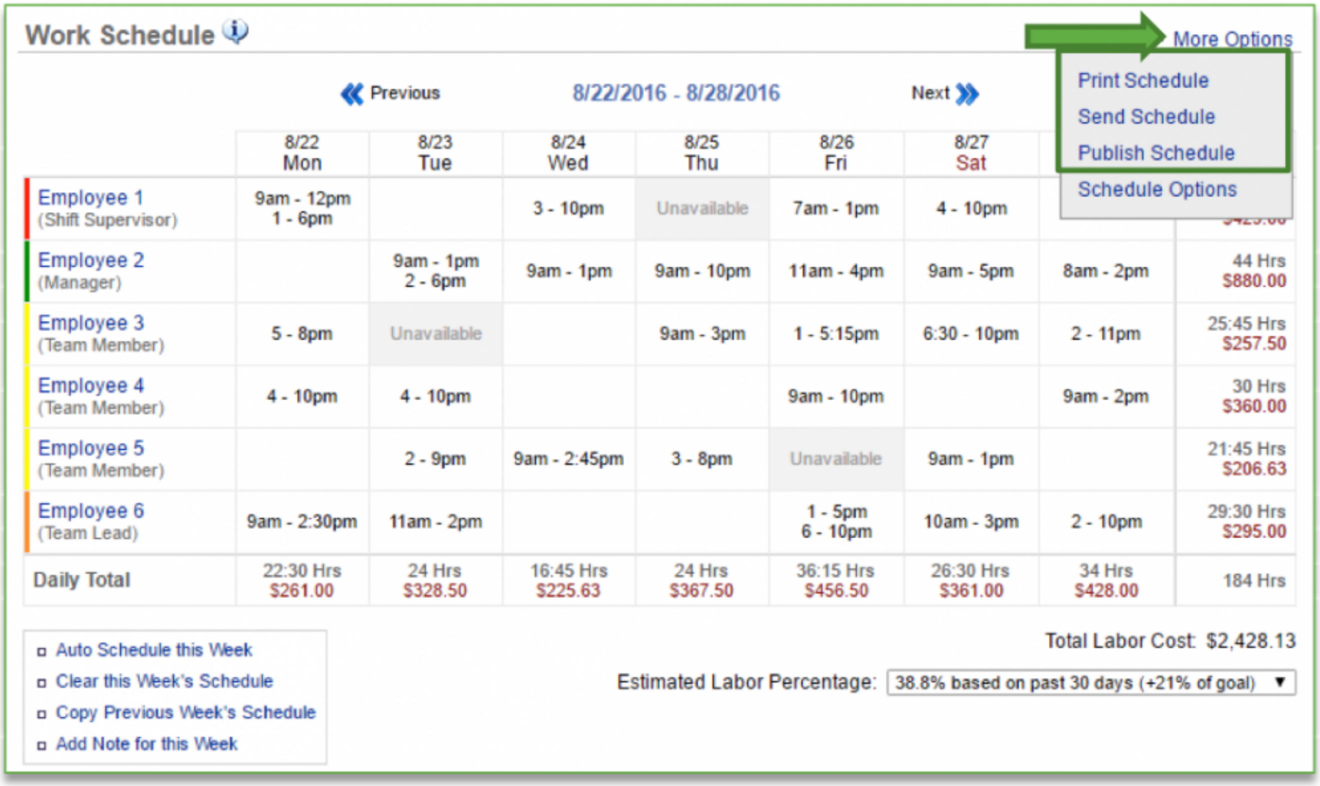
Communicating a Work Schedule

To communicate a work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.



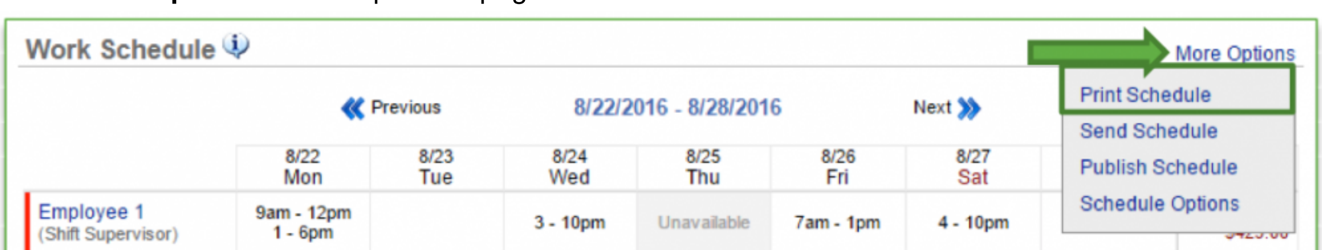
You will have three options for communicating a finalized schedule:

- Print a copy of the work schedule for team member reference
- Send the work schedule via text or email
- Publish the work schedule which sends it to the employee portal



Print a Work Schedule

1. Toggle to the week you want to print the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options** at the top of the page



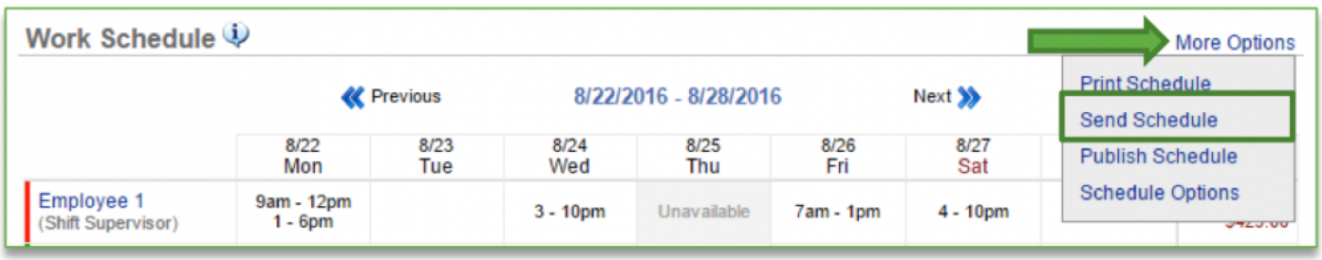
3. Click **Print**

a. A preview will come up. Click **Print**

Demo Store	Mon, 8/22	Tue, 8/23	Wed, 8/24	Thu, 8/25	Fri, 8/26	Sat, 8/27	Sun, 8/28
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm	
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm

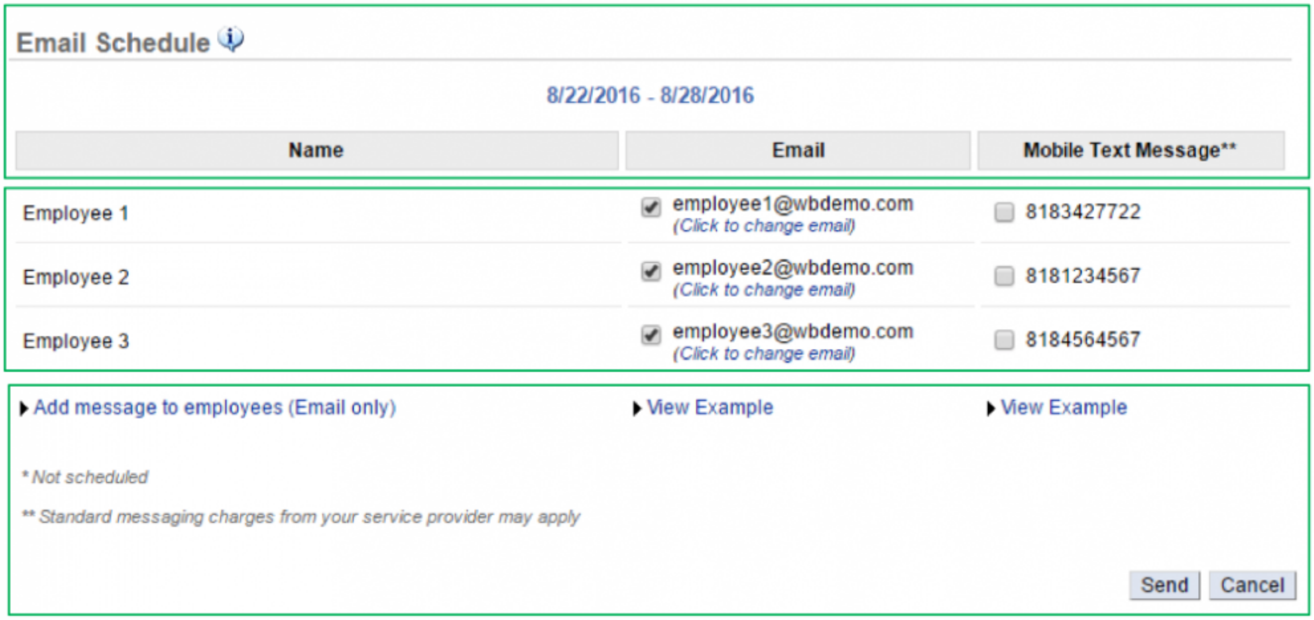
Send a Work Schedule (Via Text or Email)

1. Toggle to the week you want to print the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options** at the top of the page



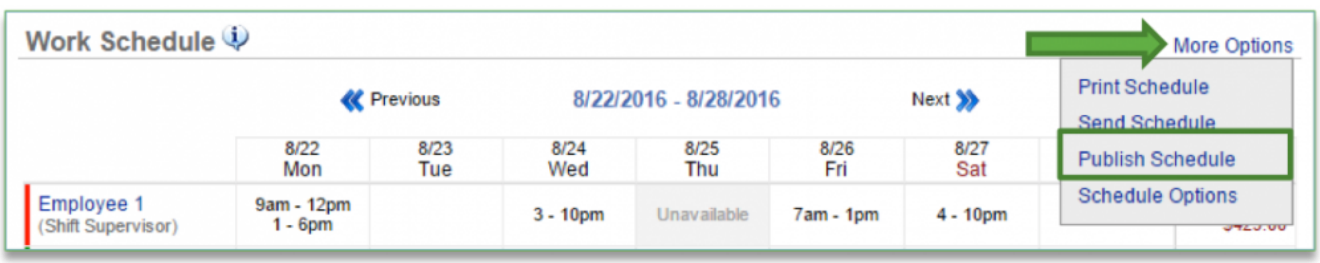
3. Check the boxes to the left of your communications preferences

4. Click **Send**



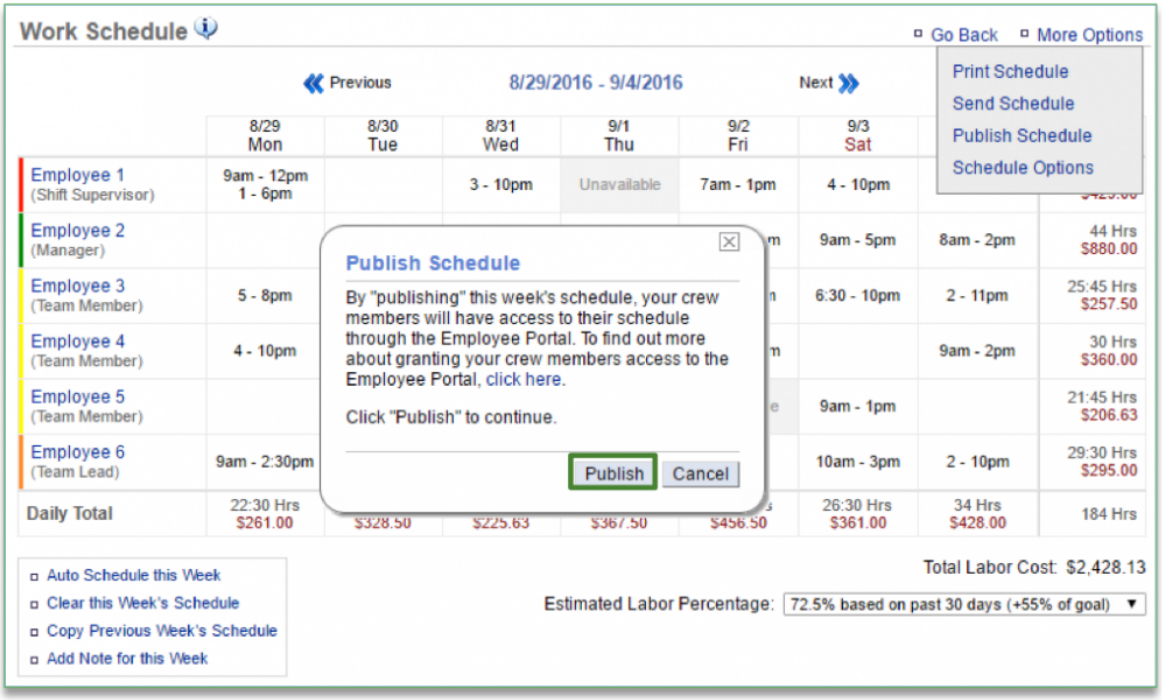
Publish a Work Schedule

1. Toggle to the week you want to print the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options** at the top of the page



3. Click **Publish**
    a. Click **Publish** from the floating window that appears to confirm your choice

i. This finalizes the schedule and sends it to the Employee portal for employee reference



Related Topics:

[Creating a Work Schedule]()

[Add a Note for Current Week]()

Time Card

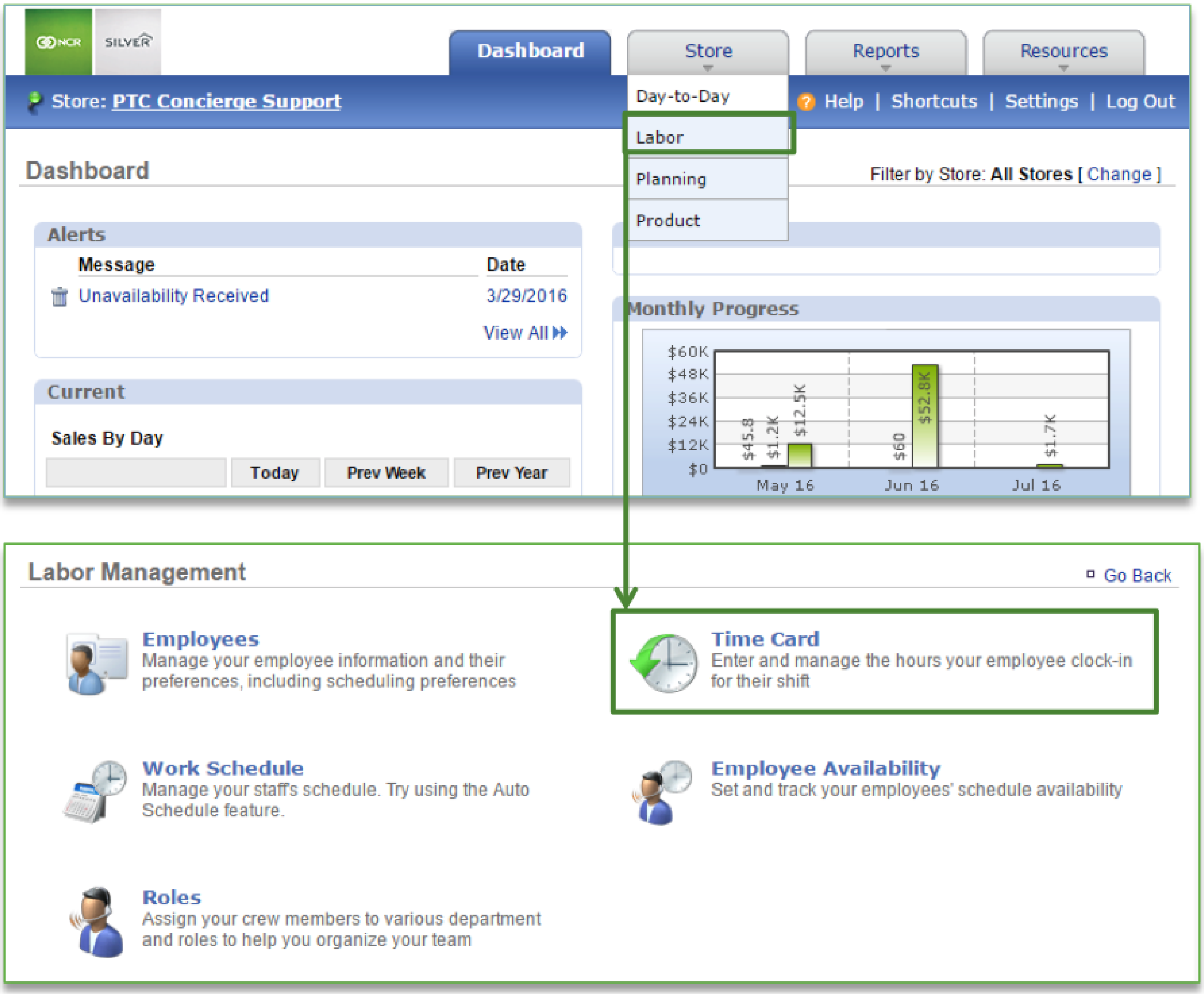
In this module, you will learn:

- How to view time card data within Console

Time Cards

The time card feature tracks clock-ins and clock-outs for your employees. It also provides you the ability to export time card information for payroll purposes (see the **Export Time Card training module** for more information).

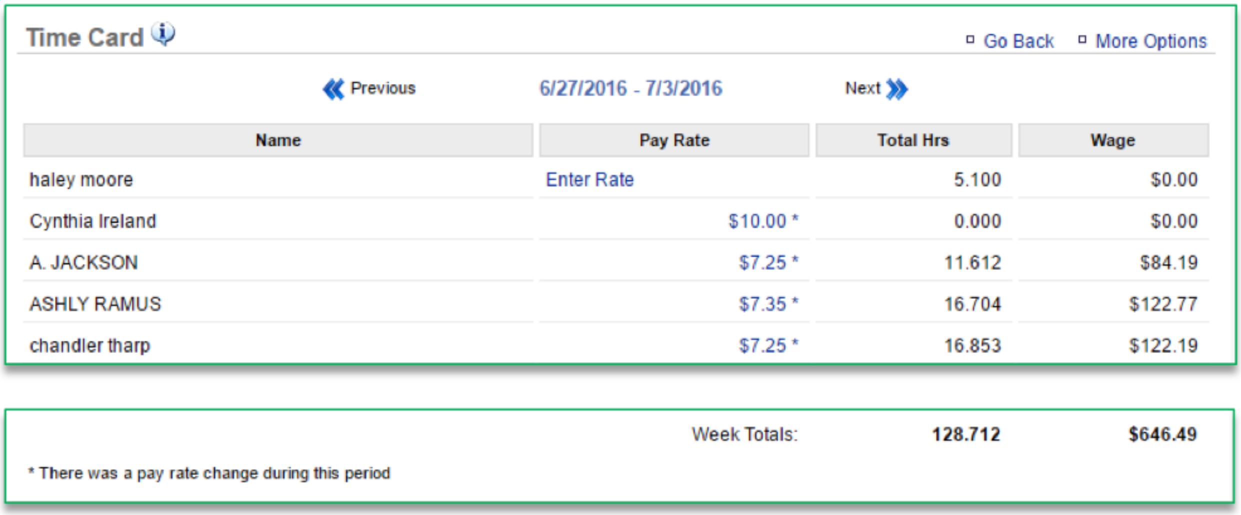
To view time card data you will need to navigate to the **Labor Management** module and click **Time Card**.



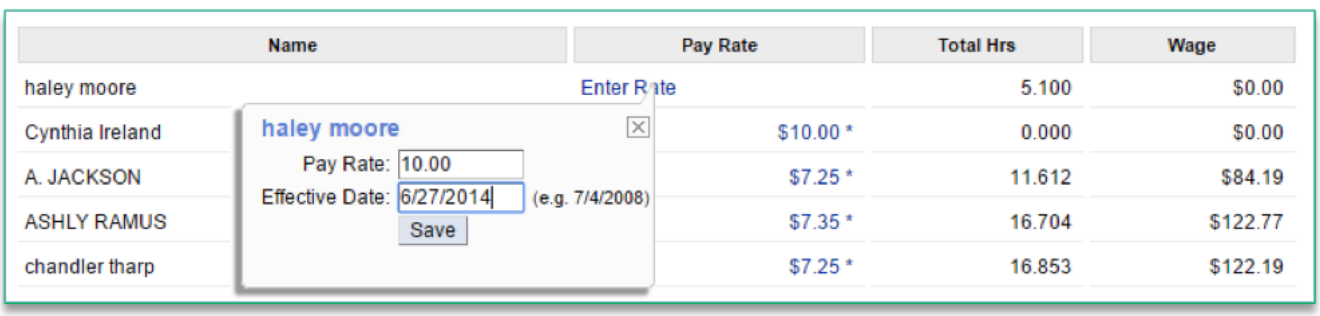
Time Card Features

1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range

a. Total hours and total wage will be displayed at the bottom of the time card

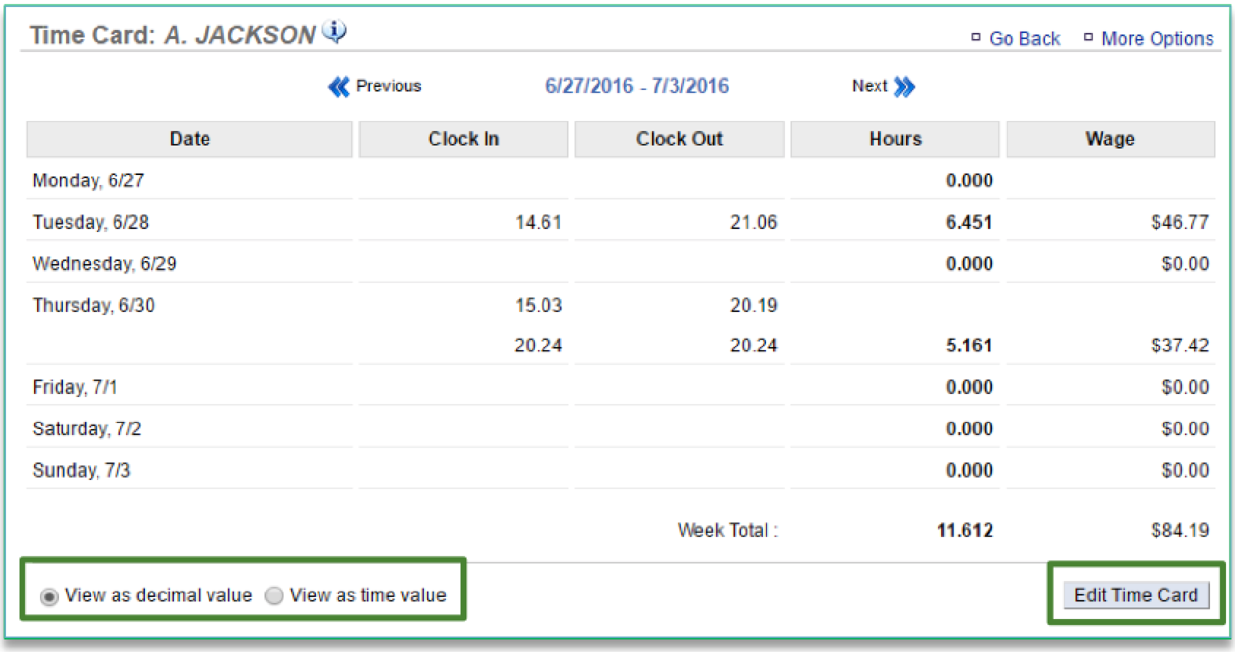


2. Click **Enter Rate** to set the pay rate for any employees that this has not yet been established for
3. Click **Save**



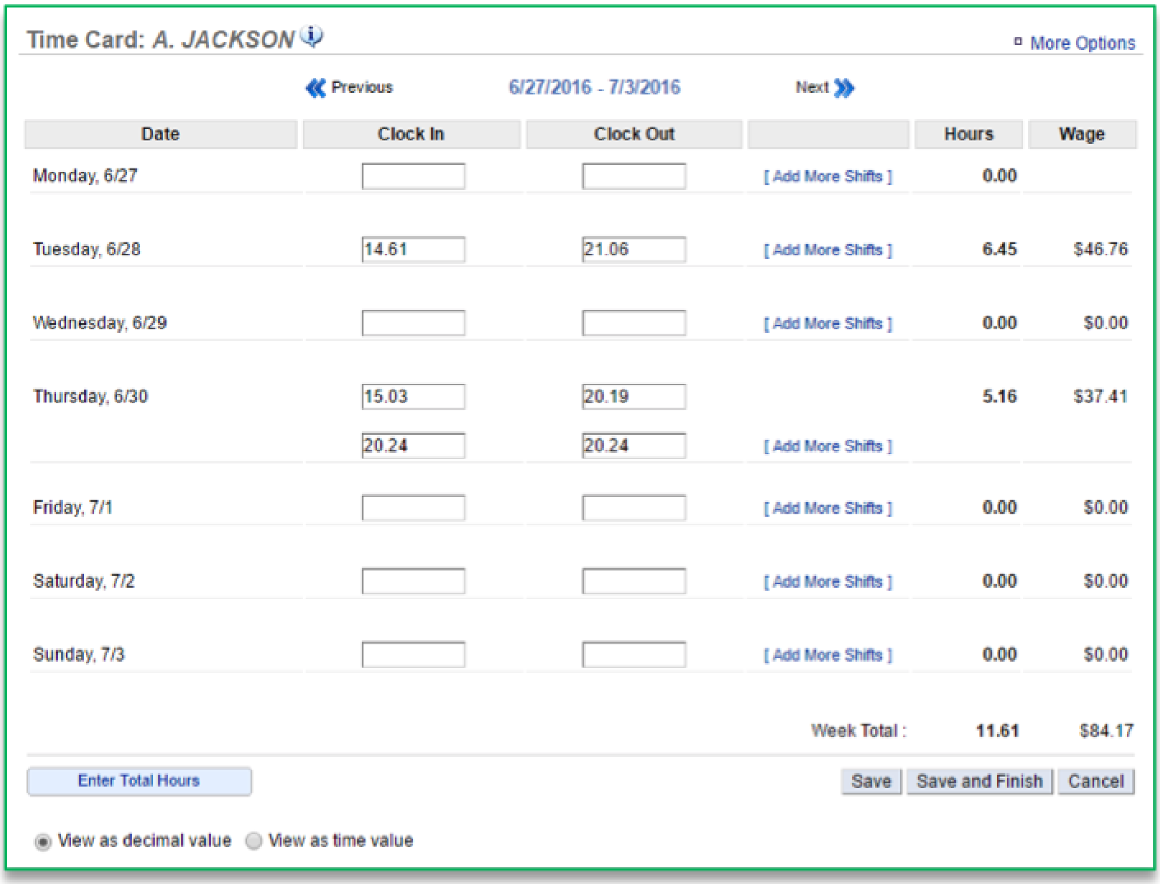
4. Click an Employee's name to access their time card information
   a. You have the option to view their hours by decimal value or by time value. At the bottom left corner of the page click:
      i. View as decimal value, or
      ii. View as time value

b. You can also edit time card information by click **Edit Time Card** at the bottom right corner of the page



i. If you choose to edit time card information, make the necessary changes and click **Save and Finish**

ii. Keep in mind that Console is continuously polling the POS. When we do, we go back approximately 3 weeks each time we grab labor hours to ensure we reflect what occurs on the POS. *For this reason, we recommend that if changes need to be made to the time* *card, they be made in NCR Silver*.



Related Topics:

[Export a Time Card]

[Import a Time Card]

Export a Time Card

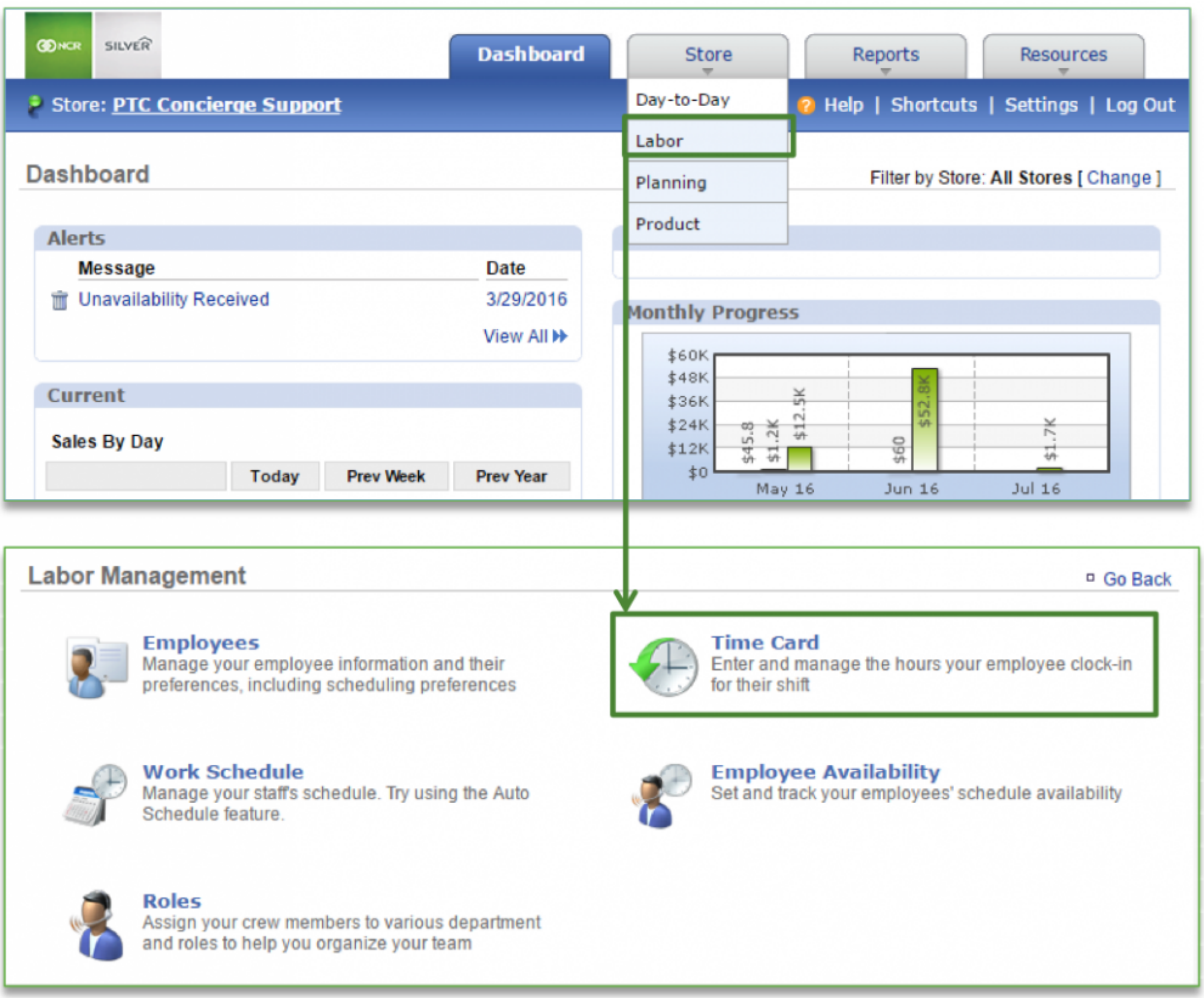
In this module, you will learn:

- How to export time card data within Console

Time Cards

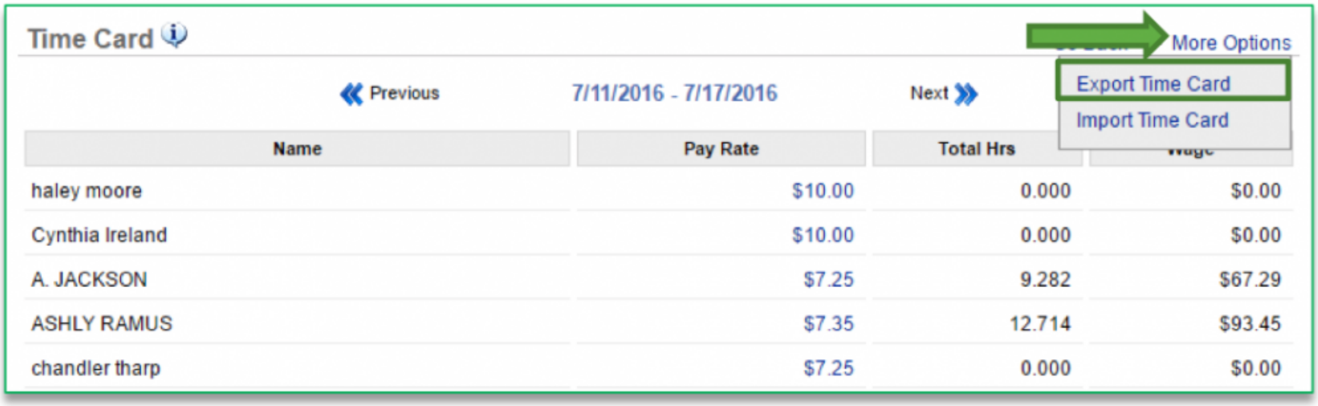
The time card feature allows you to export time card information for payroll purposes.

To export time card data you will need to navigate to the **Labor Management** module and click **Time Card**.

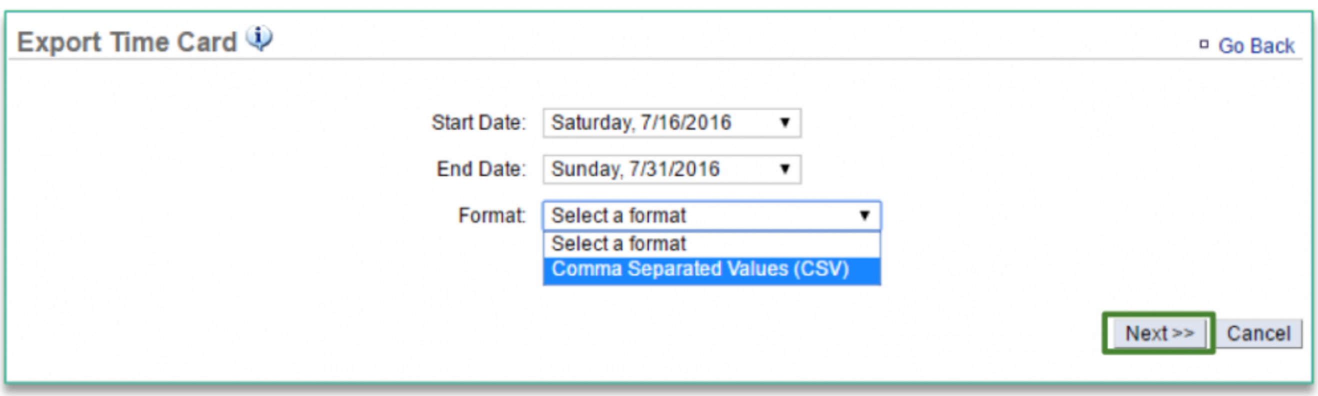


Exporting Time Card Data

1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options**
3. Click **Export Time Card**

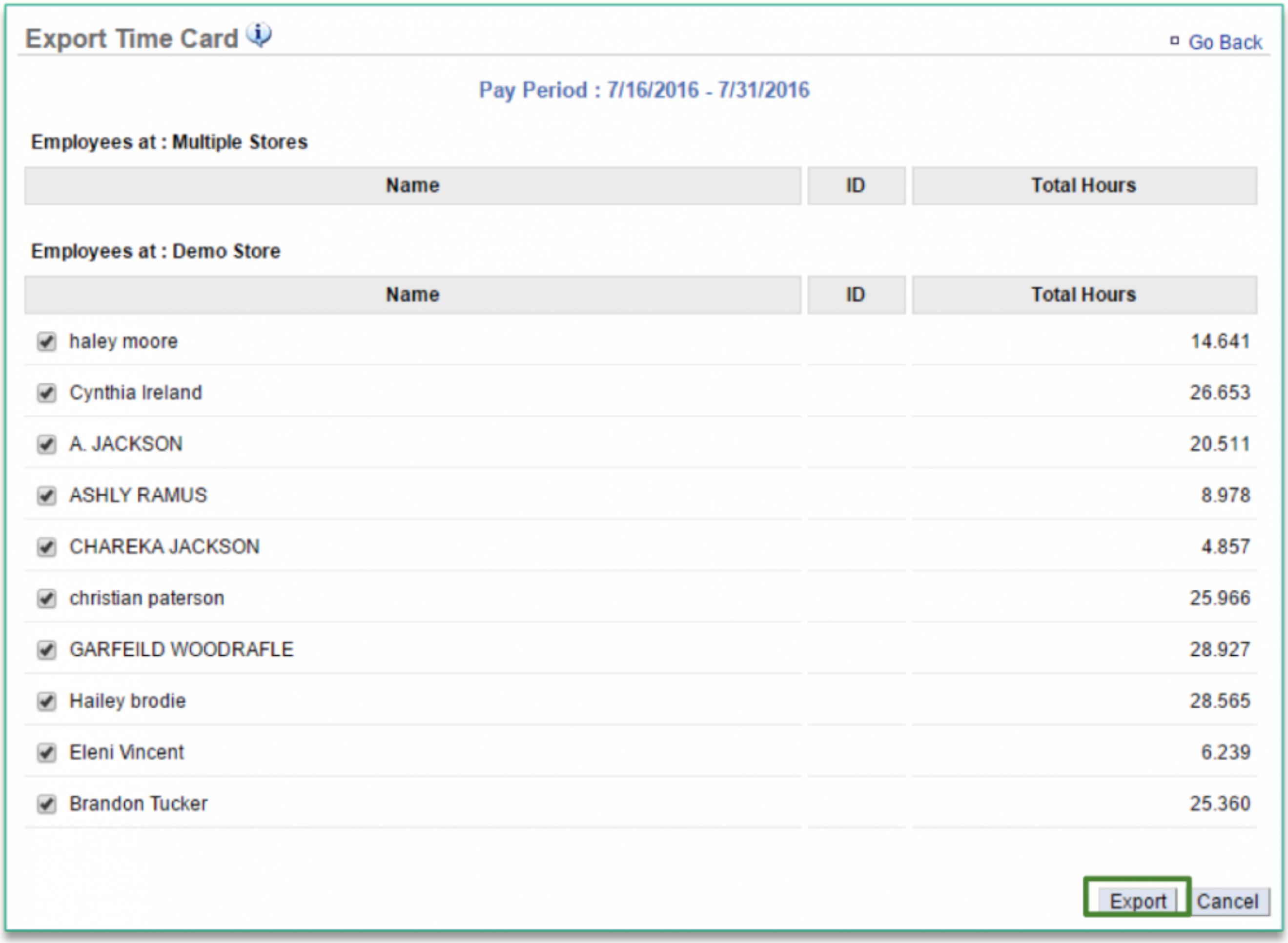


4. Select the **Start Date**
5. Select the **End Date**
6. Click the dropdown arrow to the right of **Format** to select **Comma Separated Values (CSV)**
7. Click **Next**

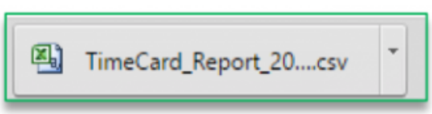


8. Select the employees you wish to export timecard information for

9. Click **Export**



10. A file will appear at the bottom of the screen. Click the file to open it
11. Save it to your computer



Related Topics:

[Time Card]

[Import a Time Card]

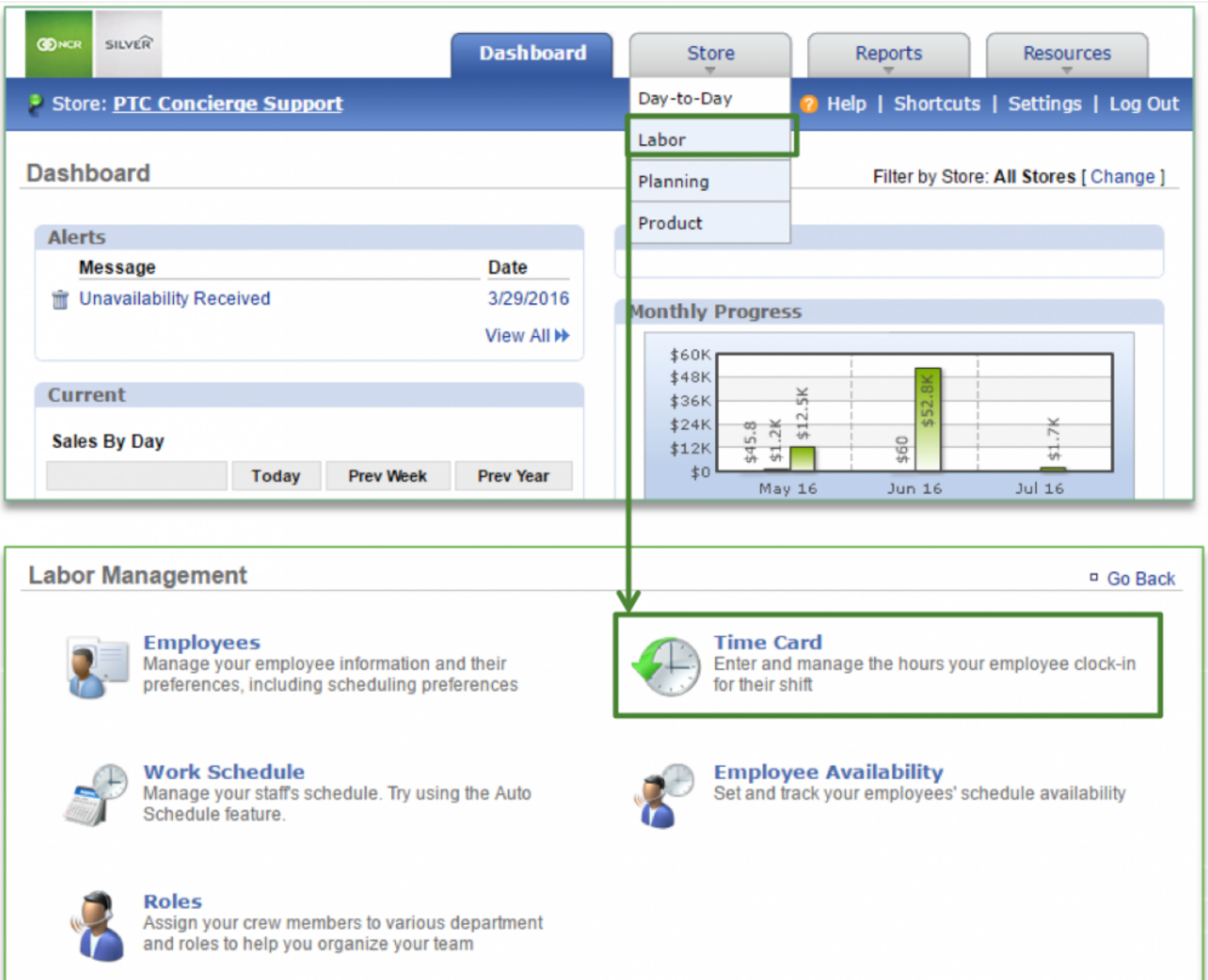
Import a Time Card

In this module, you will learn:

- How to import time card data within Console

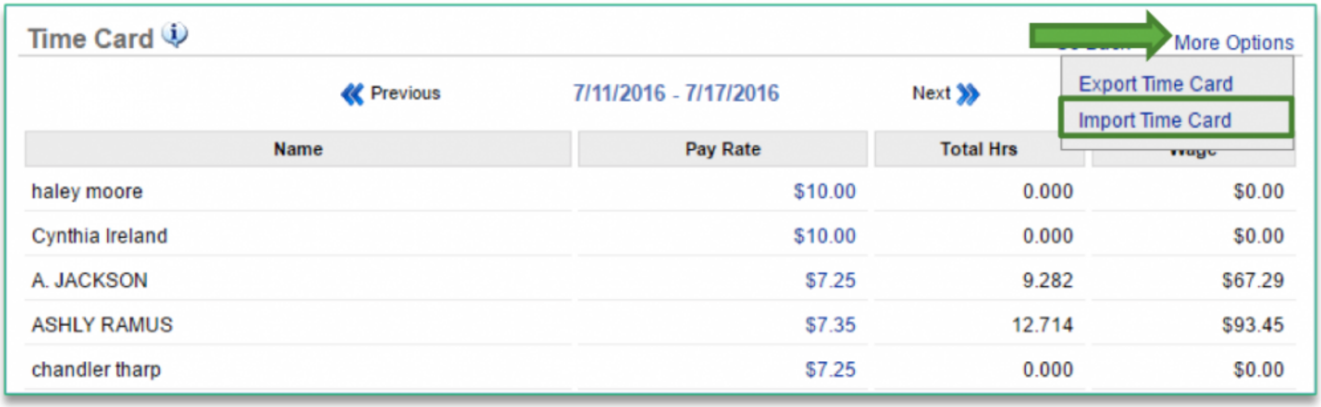
Time Cards

The time card feature allows you to import time card information for payroll purposes.
To export time card data you will need to navigate to the **Labor Management** module and click **Time Card**.

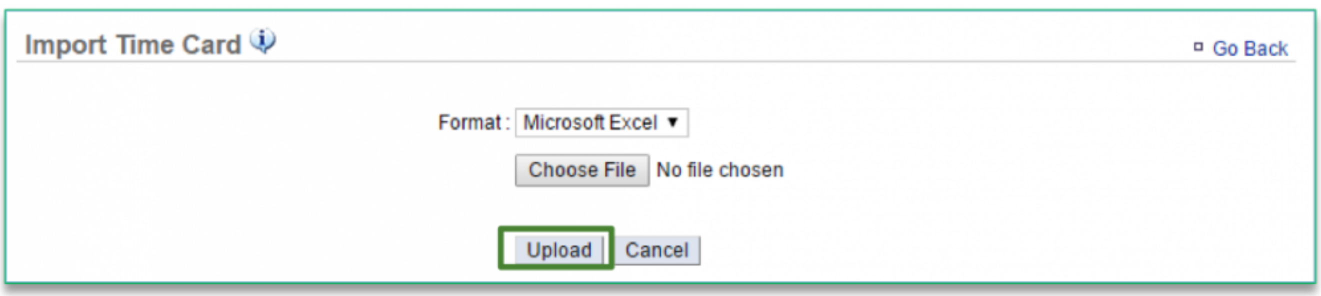


Importing Time Card Data

1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options**
3. Click **Import Time Card**



4. The format defaults to the required file type (Excel)
5. Click **Choose File** to select the file
6. Click **Upload**



Related Topics:

[Time Card Overview]

[Export a Time Card]

Employee Training

This section illustrates how a manager can assign training videos and certification tests as well as how employees access and complete those requests. Click on a topic below for more detailed information.

How to Assign Training Videos and Certification Tests
How Employees Access Training

Need a training video or certification test uploaded to your CimpleBox site? Contact us via email at support@cimplebox.com so we can help!

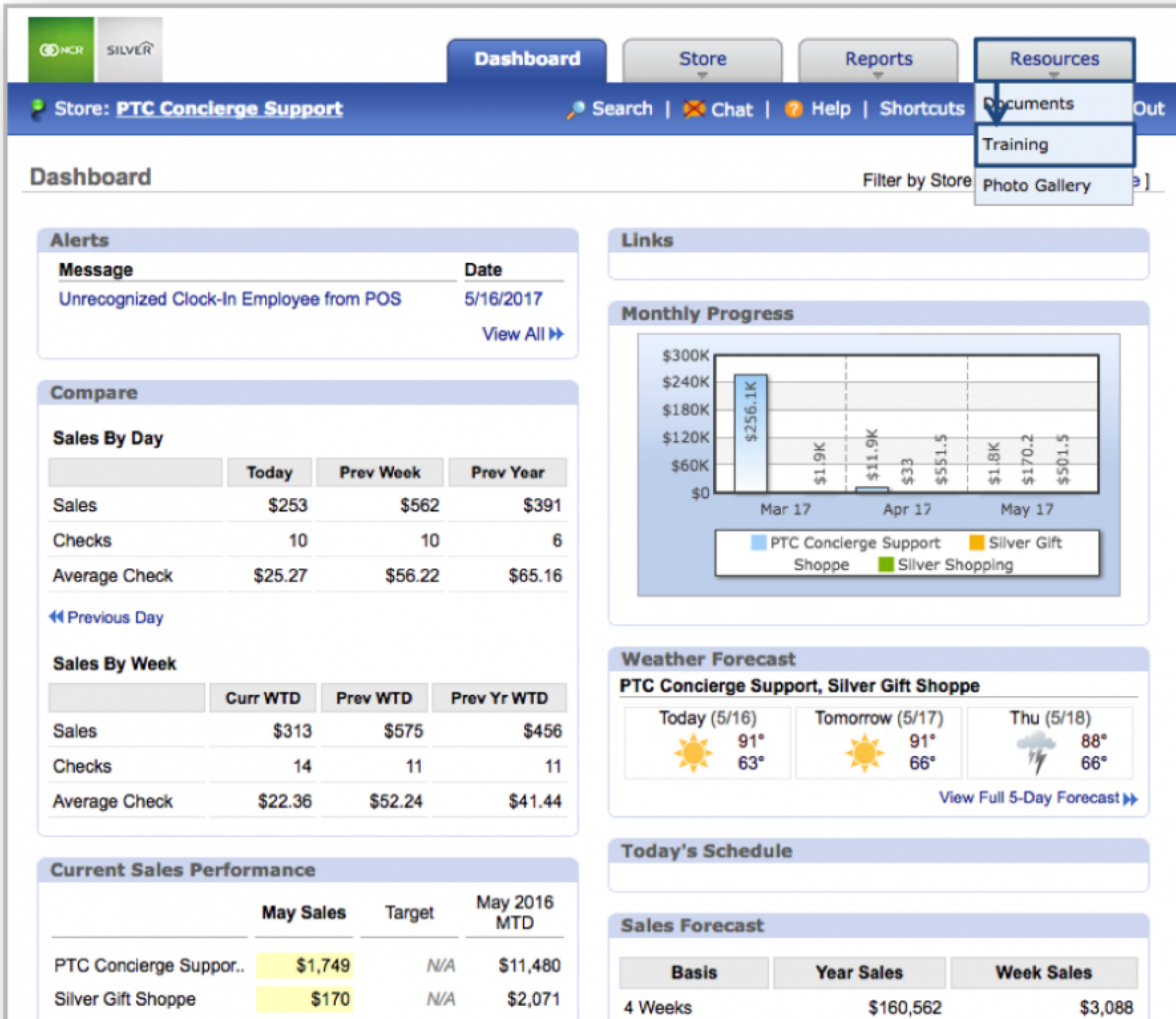
! **Remember:** Training materials can be uploaded to your ***Resources*** section (within Documents) for team member reference at any time. Click **here** for more detailed information about how to upload a document.

Assign Training

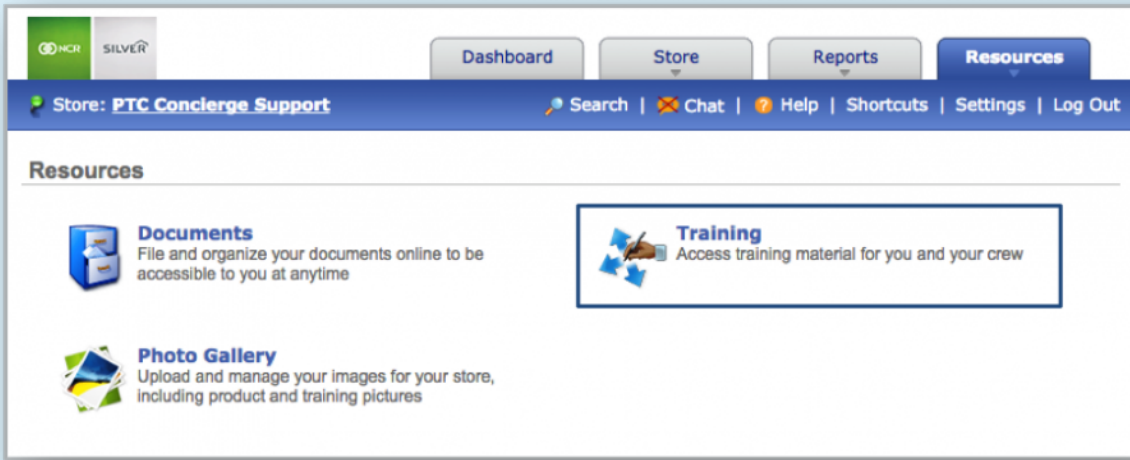
The purpose of this section is to illustrate how to assign training videos and certification tests to your employees.

How to Assign a Test or Video

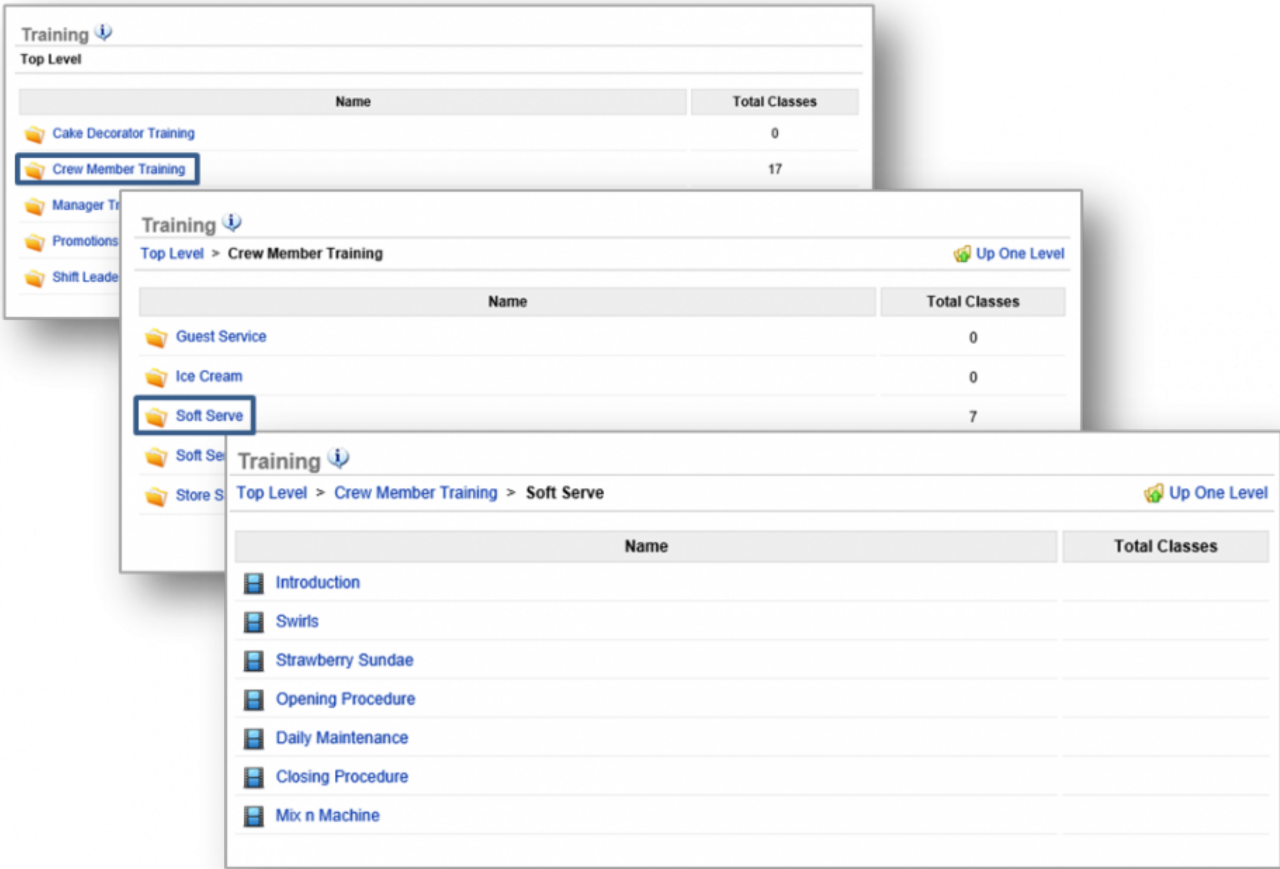
STEP 1: From your Dashboard view, mouse over the ***Resources*** tab and click ***Training***.



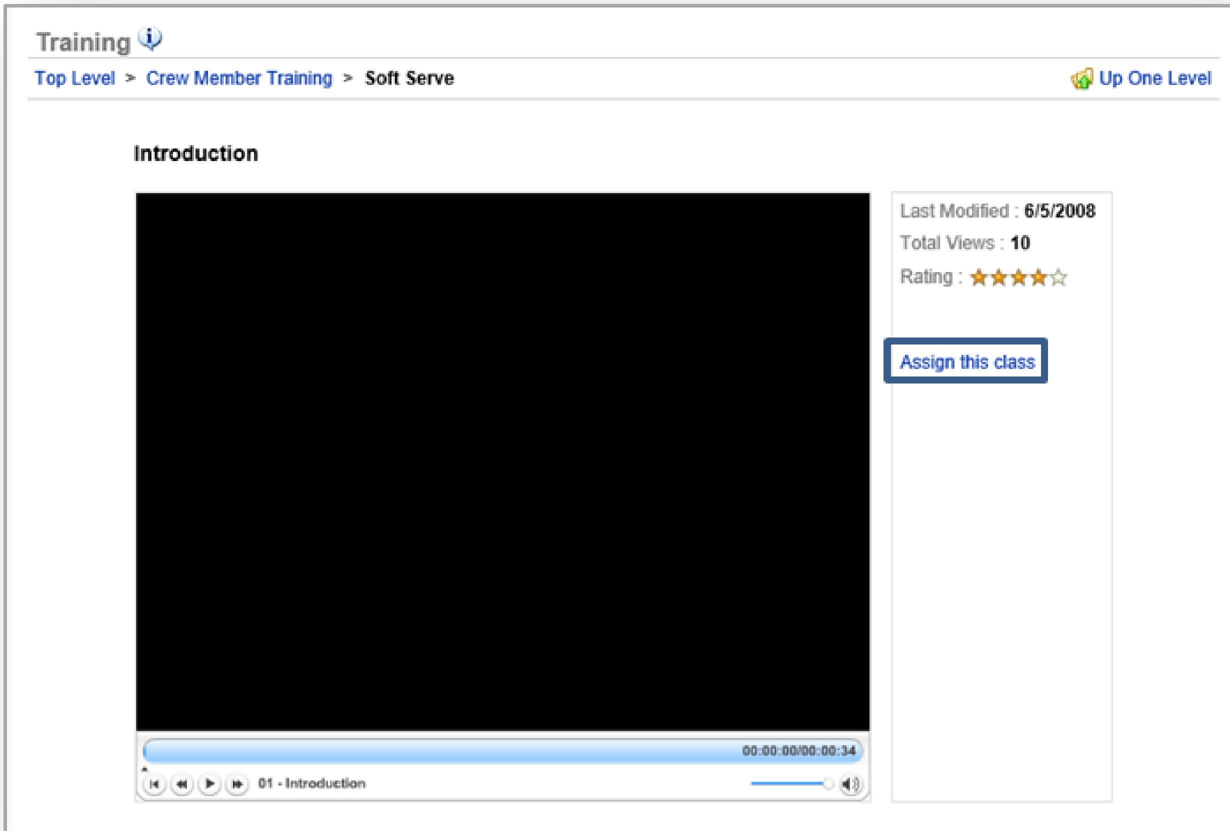
✻ ***Hint:*** You can also access Training by clicking on the ***Resources*** tab and then on ***Training*** from the Resources screen.



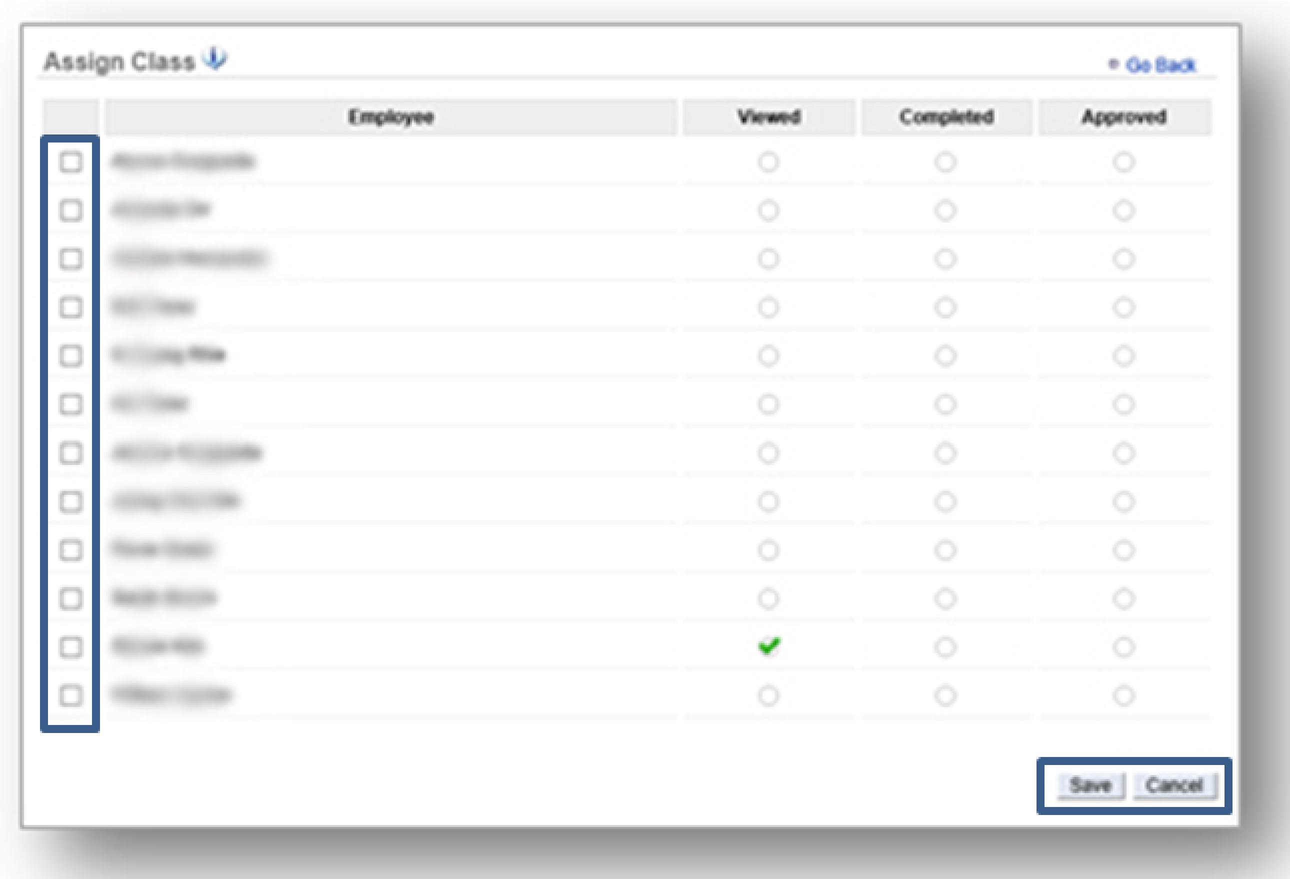
STEP 2: From the *Training* screen, select the class or subject you wish to access. You can set up subjects (folders) within classes to drill down to specific training videos or certification tests.



STEP 3: Select the video or test you want to assign and click ***Assign this class*** to the right of the image or video.

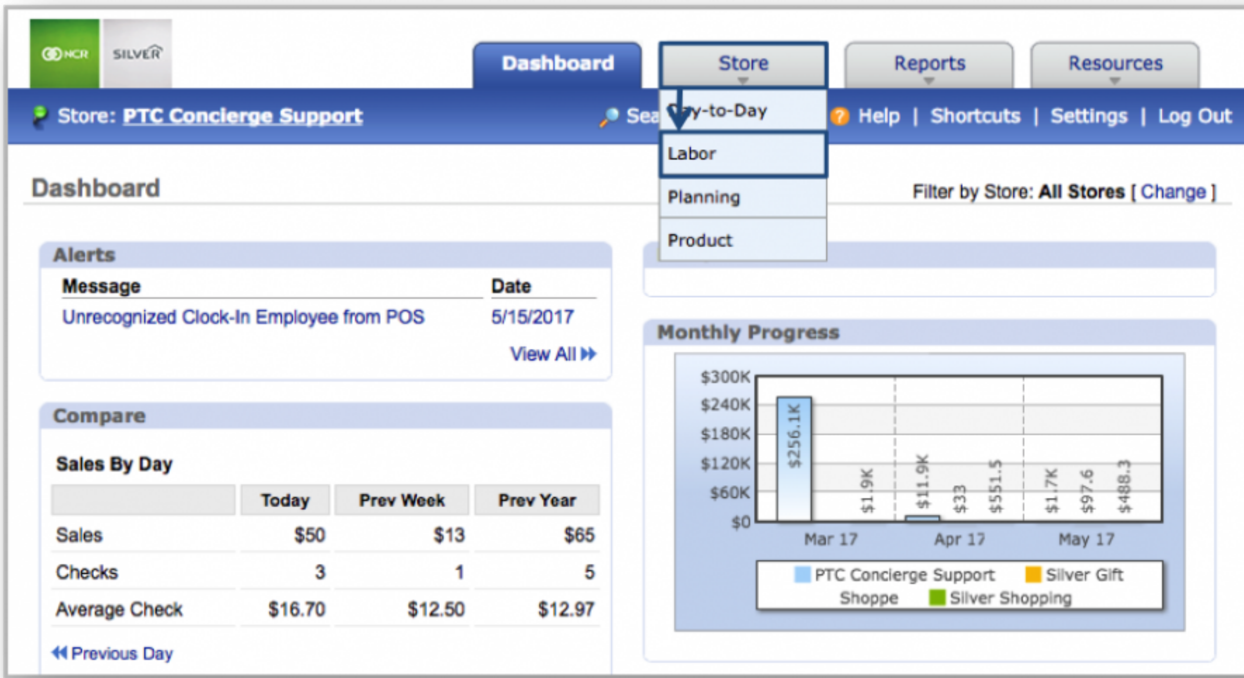


STEP 4: Select the employees you wish to assign the video or test to and click ***Save***. Click ***Cancel*** to cancel your request and return to the previous screen.

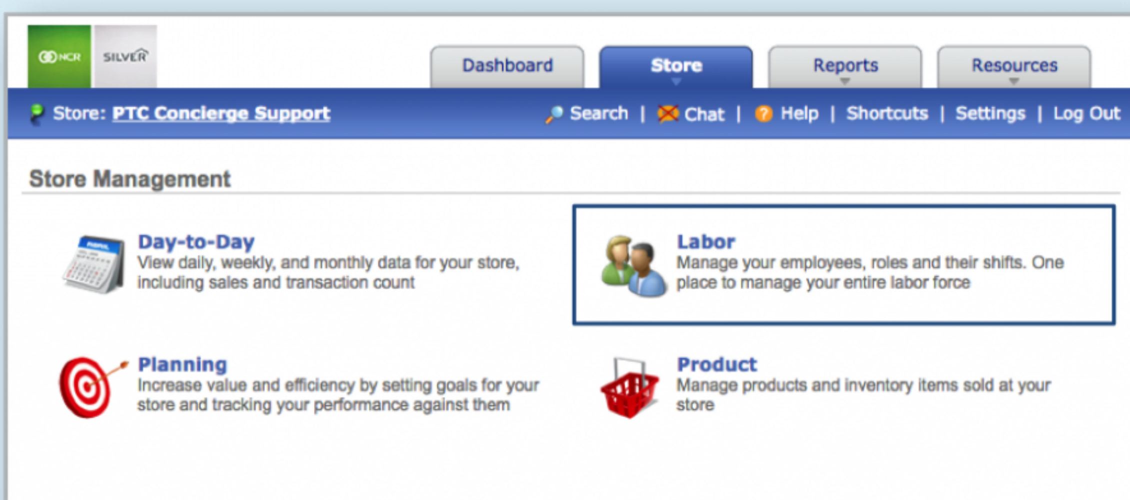


Check an Employee's Progress

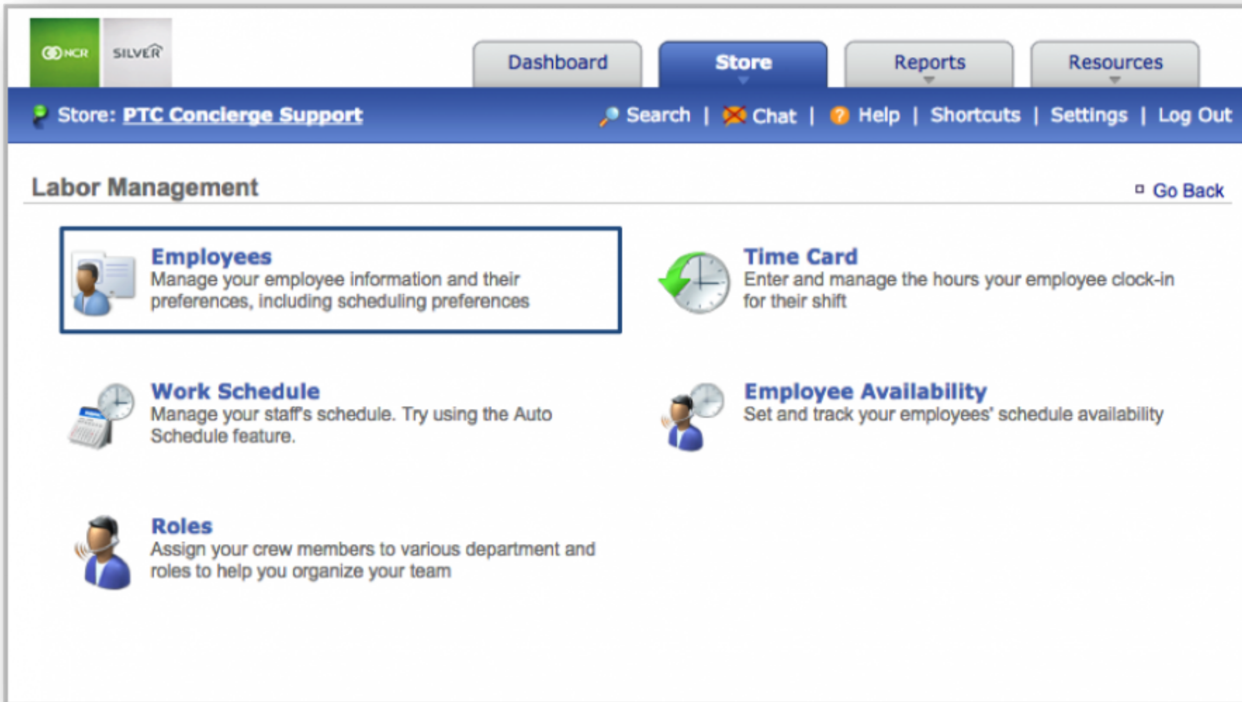
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Labor***.



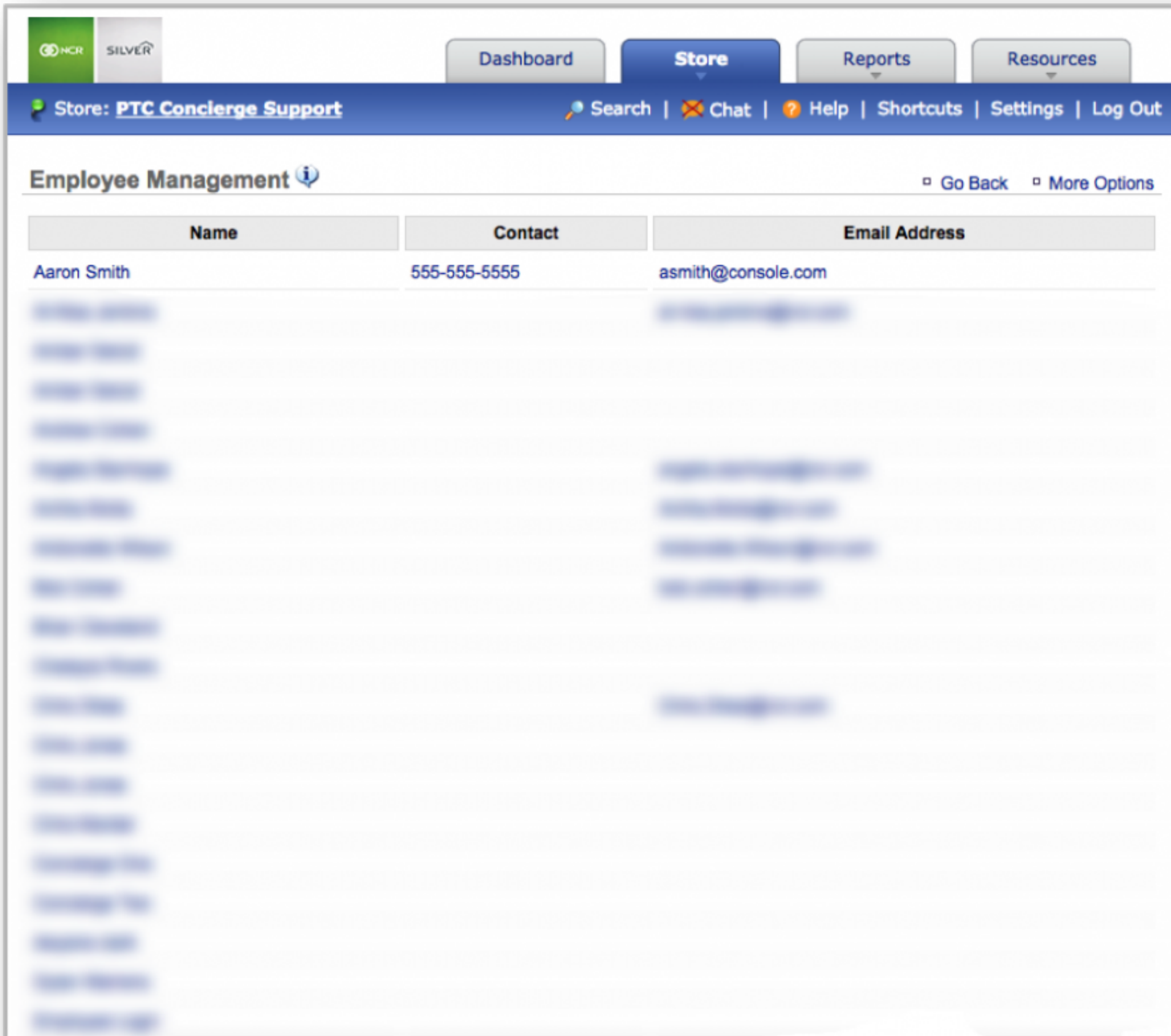
✱ ***Hint:*** You can also access Labor by clicking on the ***Store*** tab and then on ***Labor*** from the Store Management screen.



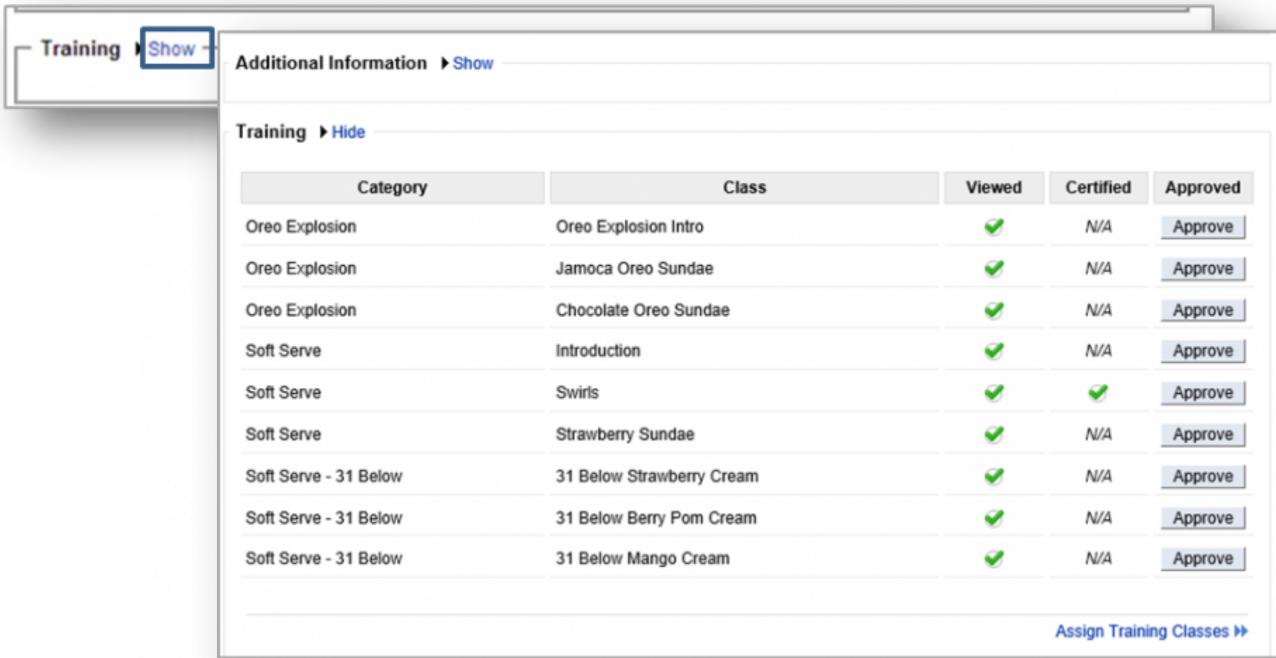
STEP 2: From the Labor Management screen, click ***Employees***.



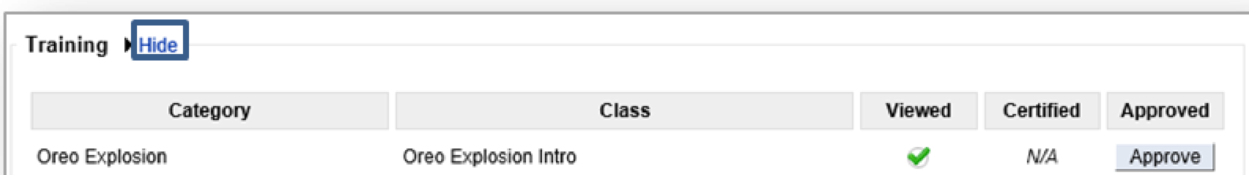
STEP 3: Select the employee you wish to view training information for.



STEP 4: Click ***Show*** to the right of ***Training*** to view progress on any classes that have been assigned to him/her.

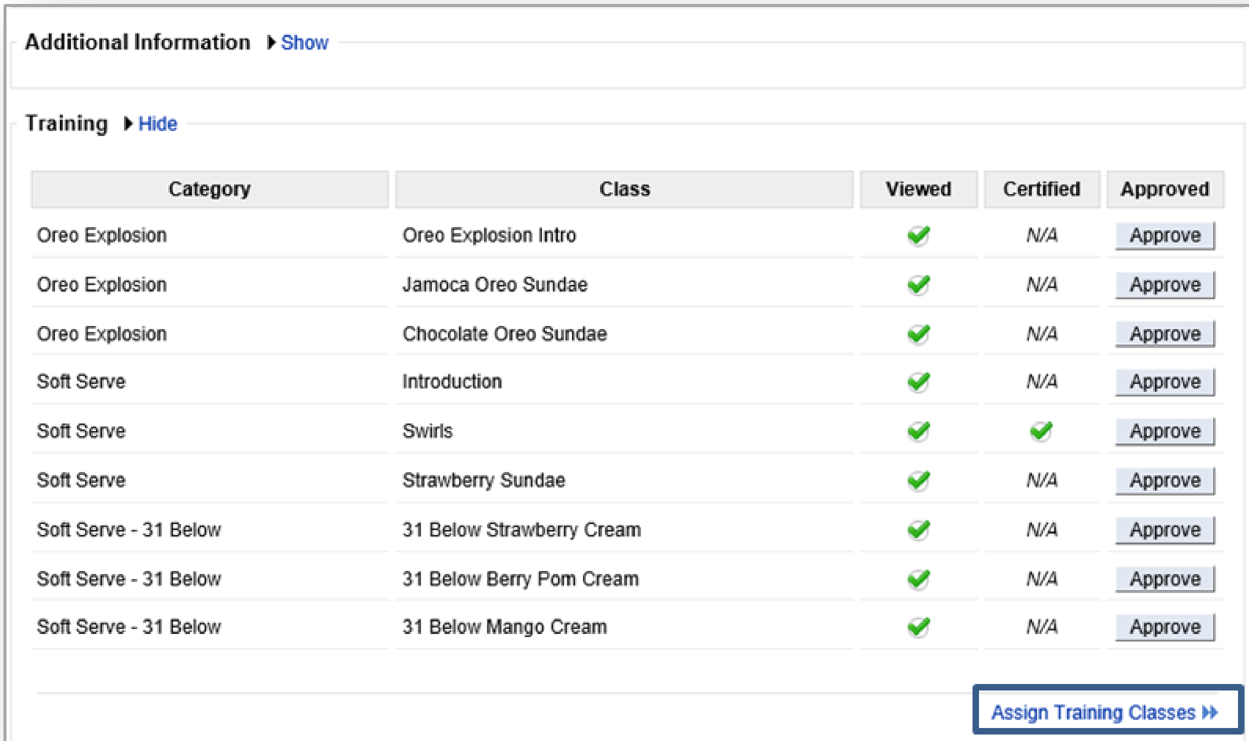


STEP 5: Click ***Hide*** to the right of ***Training***, once you have completed viewing the information to collapse the expanded view.



How to Assign Multiple Training Videos & Certification Tests to an Employee

STEP 1: Click ***Assign Training Classes*** at the lower right corner of the screen.

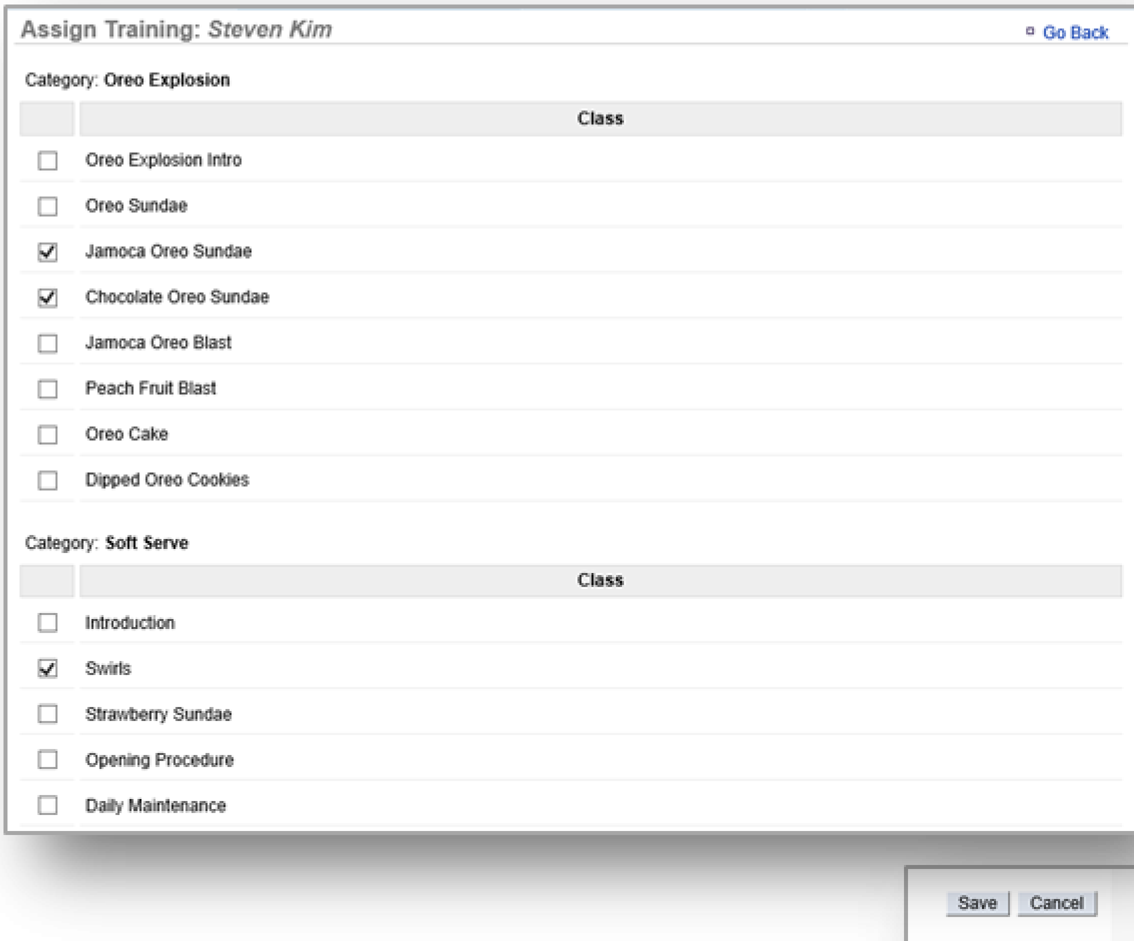

Additional Information ▸ Show

Training ▸ Hide

Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	Approve
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

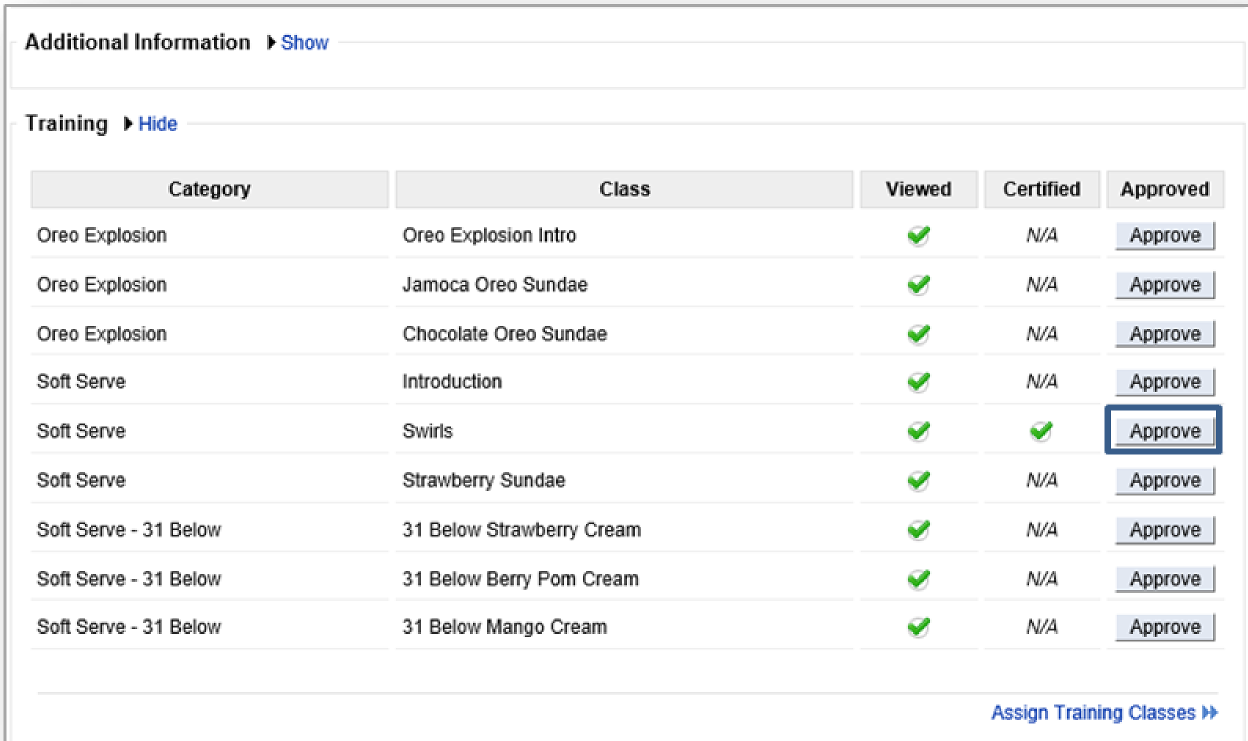
Assign Training Classes

STEP 2: Select those classes you wish to assign and click ***Save***.



How to Approve Completion of Assigned Training Videos & Certification Tests

STEP 1: Click ***Approve*** to the right of the applicable class.



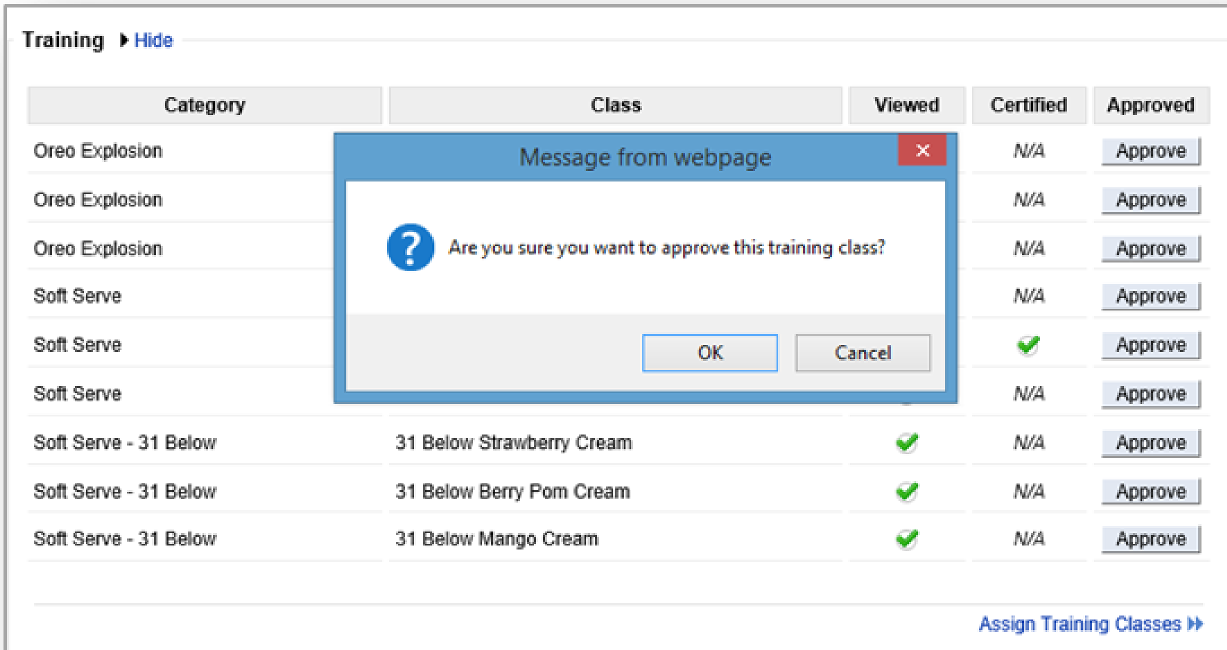
Additional Information Show

Training Hide

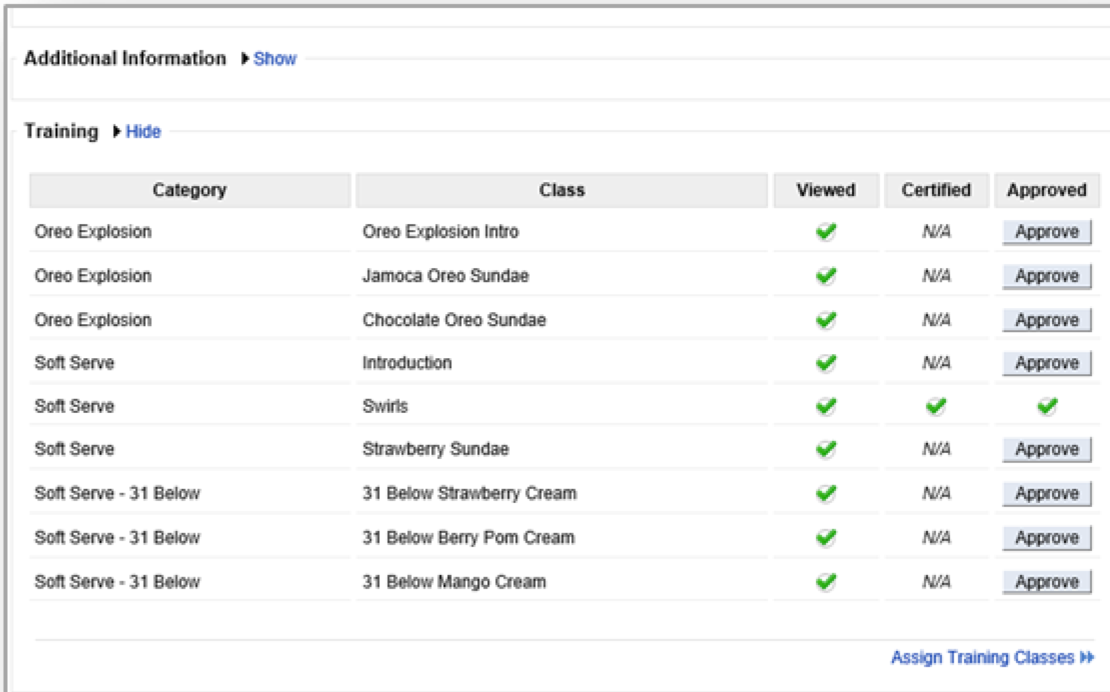
Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	Approve
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

Assign Training Classes

STEP 2: Click ***OK*** when asked if you are sure you want to approve the training class.



Once you approve a class, it will automatically update the employee file.

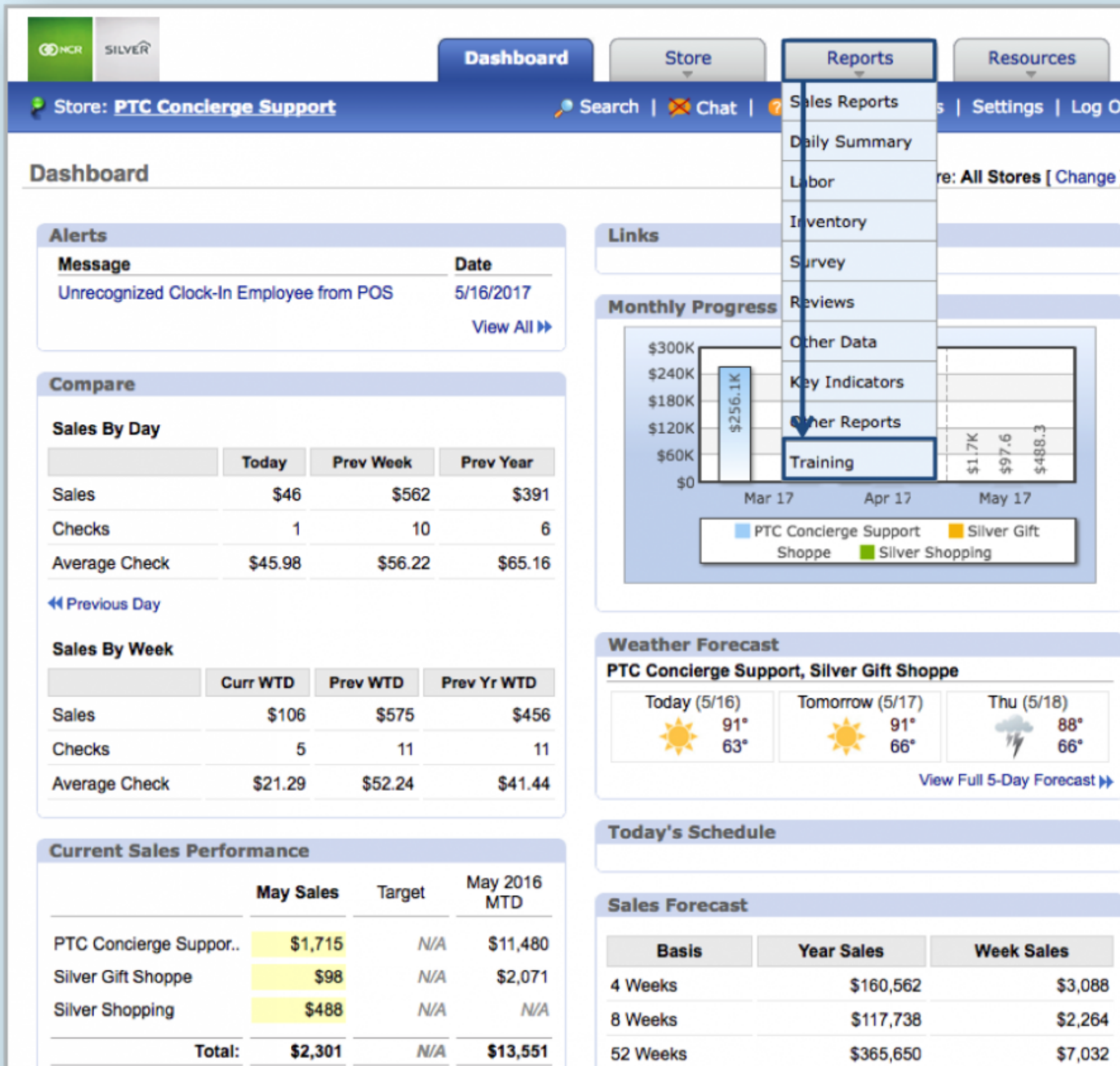

Additional Information ▸ Show

Training ▸ Hide

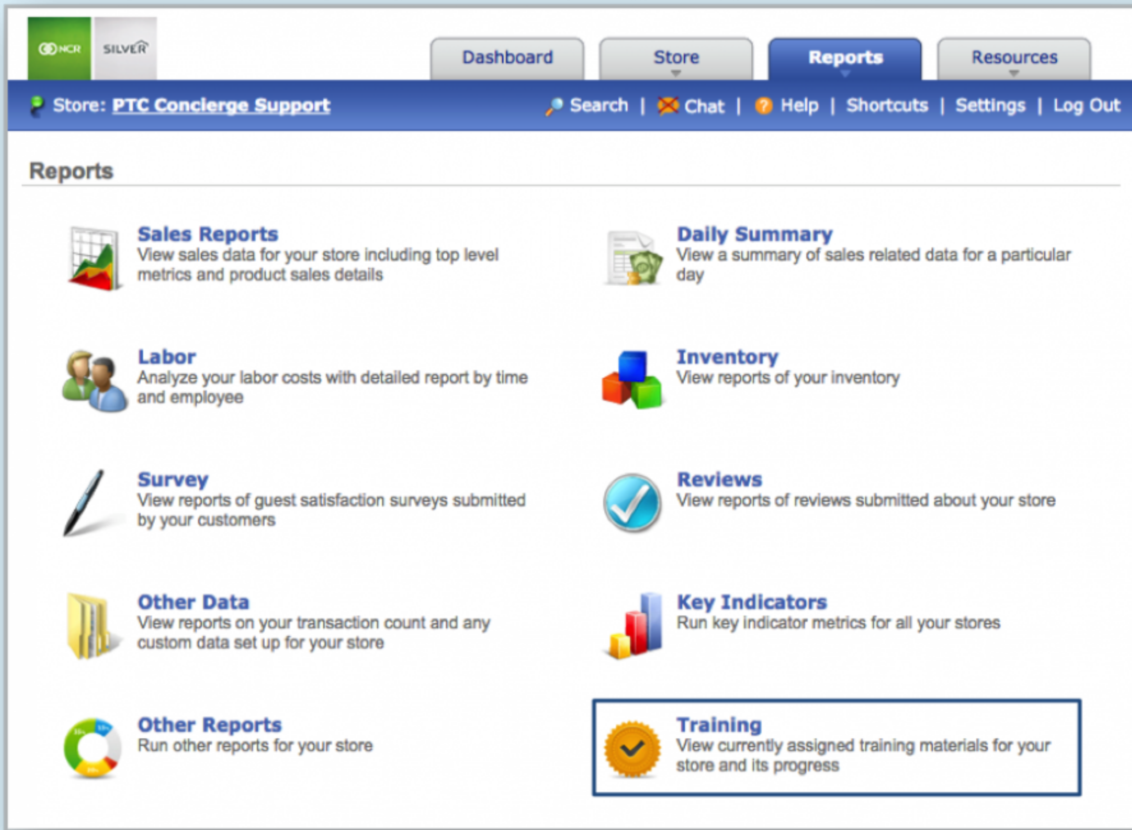
Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✔	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✔	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✔	N/A	Approve
Soft Serve	Introduction	✔	N/A	Approve
Soft Serve	Swirls	✔	✔	✔
Soft Serve	Strawberry Sundae	✔	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✔	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✔	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✔	N/A	Approve

Assign Training Classes ▸▸

Reporting Feature! To view the progress of all assigned classes, mouse over the ***Reports*** tab and click ***Training***.



Hint: You can also access the Training Report by clicking on the ***Reports*** tab and then on ***Training*** from the Reports screen.



The following report will provide you with an overview of all classes assigned to your team and their progress in completing those assignements.

Training

Go Back

Class	Assigned	Completed	Percent
Crew Member Training > Soft Serve			
Swirls	1	1	100.0%
Crew Member Training > Soft Serve - 31 Below			
31 Below Strawberry Cream	1	0	0.0%
31 Below Berry Pom Cream	1	0	0.0%
31 Below Mango Cream	1	0	0.0%
Promotions > Oreo Explosion			
Oreo Explosion Intro	1	1	100.0%
Oreo Sundae	1	0	0.0%
Jamoca Oreo Sundae	1	0	0.0%
Chocolate Oreo Sundae	1	0	0.0%

Related Topics:

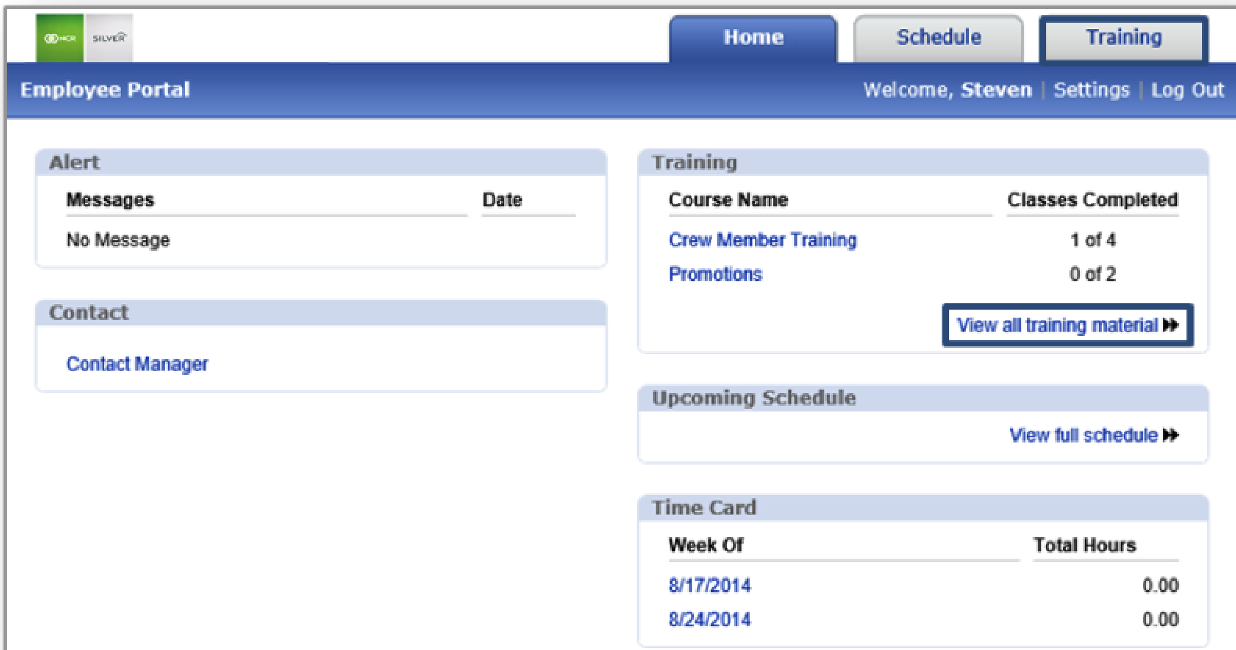
[How Employees Access Training]

Employee Access

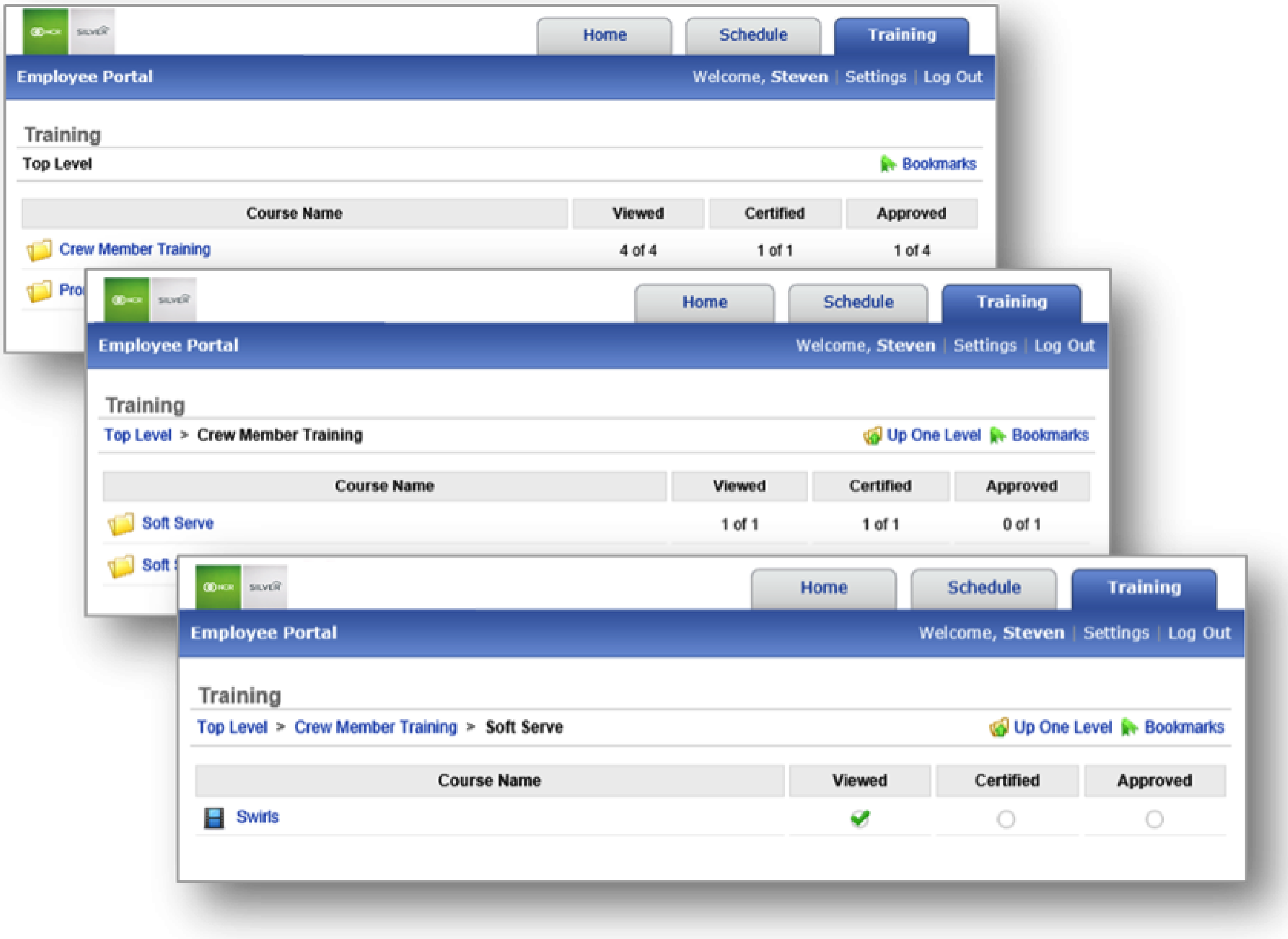
The purpose of this section is to illustrate how an employee can access assigned training videos and certification tests.

How to Access Training Videos & Certification Tests

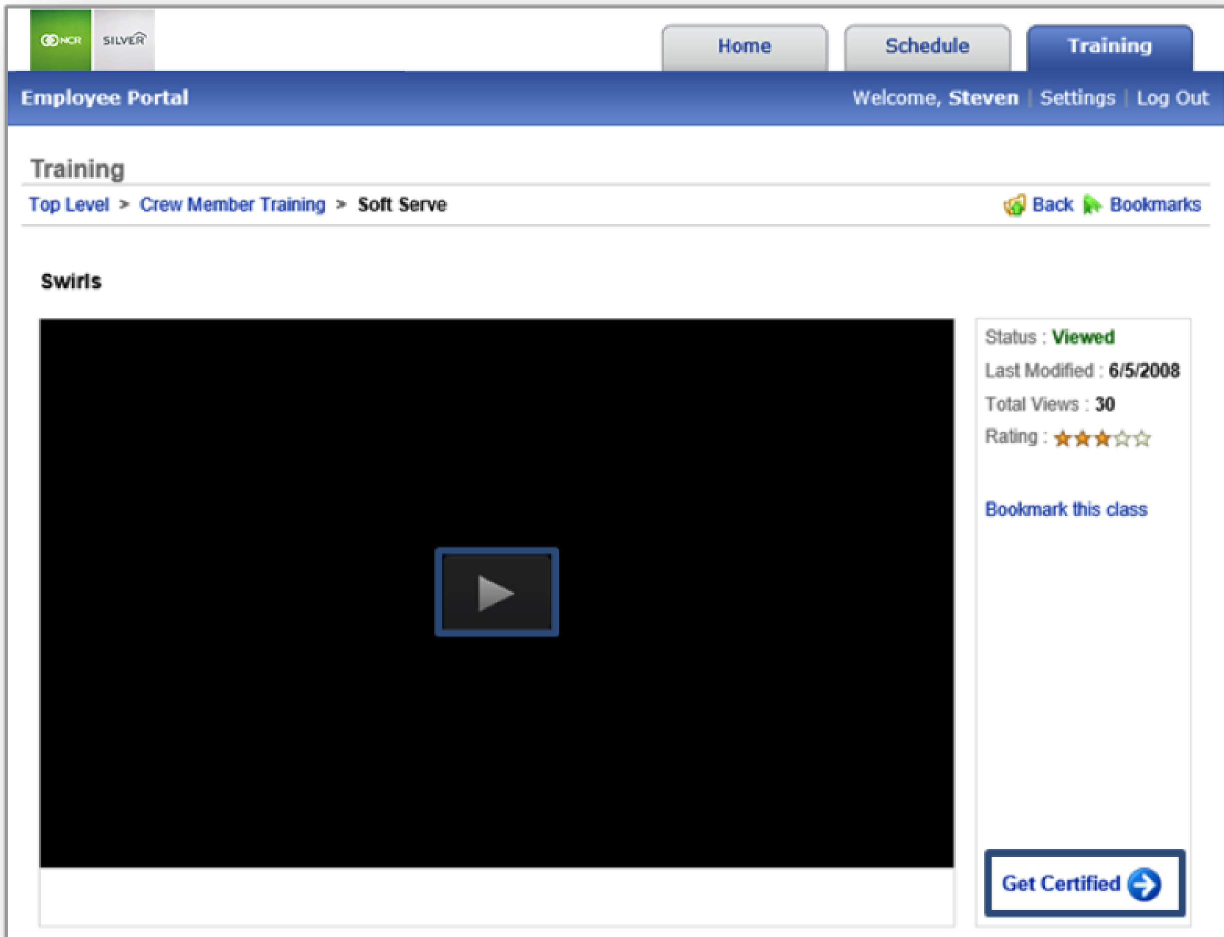
STEP 1: From the Dashboard view, mouse over the ***Training*** tab and click it. You can also click ***View All Training Materials*** located to the bottom right of the *Training Alerts* box on your dashboard.



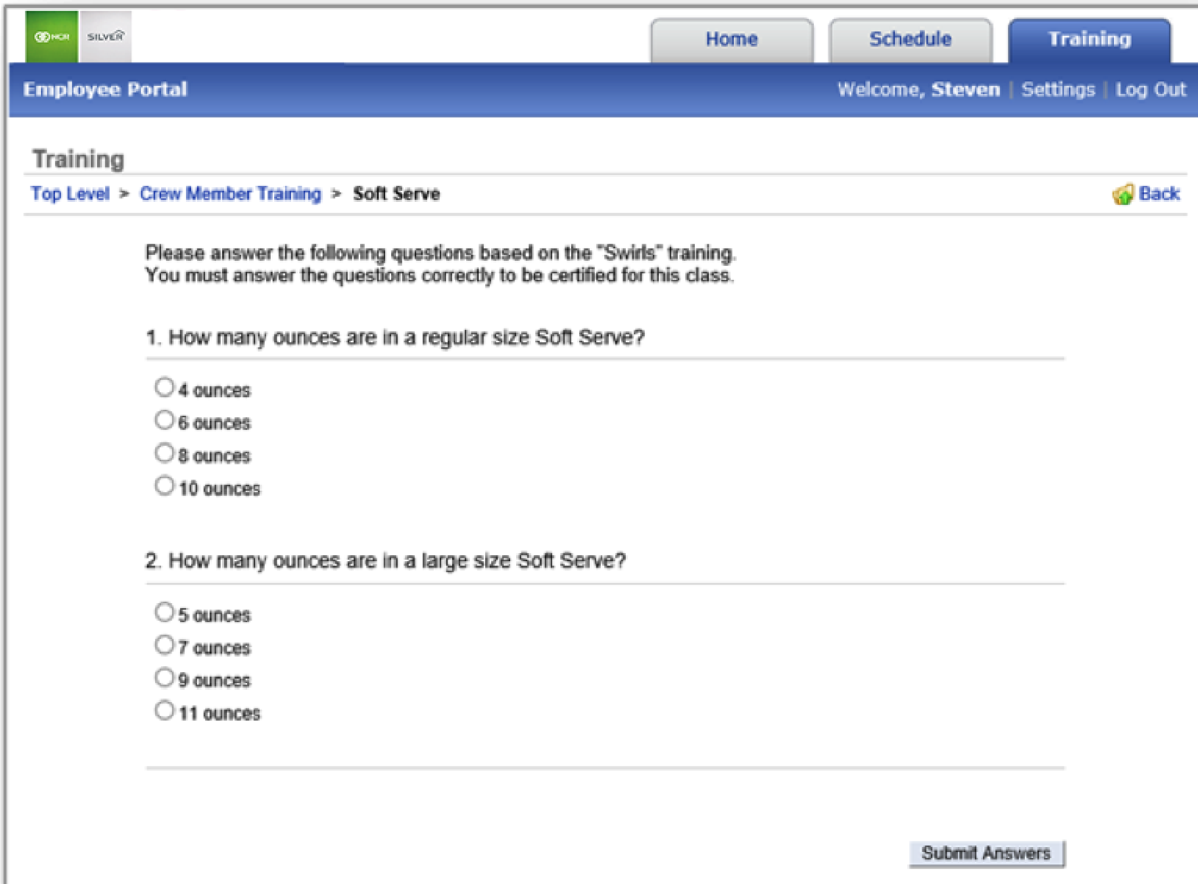
STEP 2: Click the folder for the class that has been assigned to you. Keep in mind, you may be assigned multiple classes, each of which may contain multiple videos and/or certification tests.



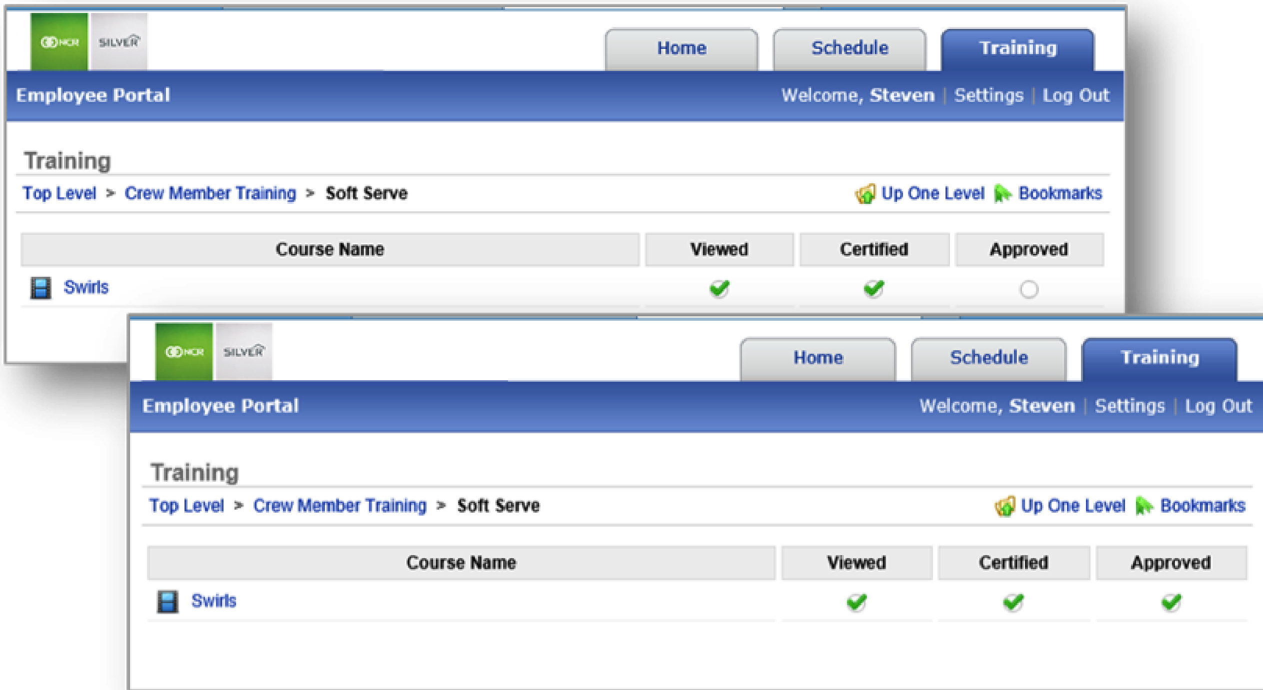
STEP 3: After you have viewed the necessary training materials and/or videos, click ***Get Certified*** to begin the test.



STEP 4: Click ***Submit Answers*** to complete the test. A message will pop up to notify you of your completion status.



Once you have completed a class, it will be automatically reflected in your employee file. At this time, your supervising manager will review your progress to approve completion. Upon submitting approval, your employee file will be updated to reflect this change.



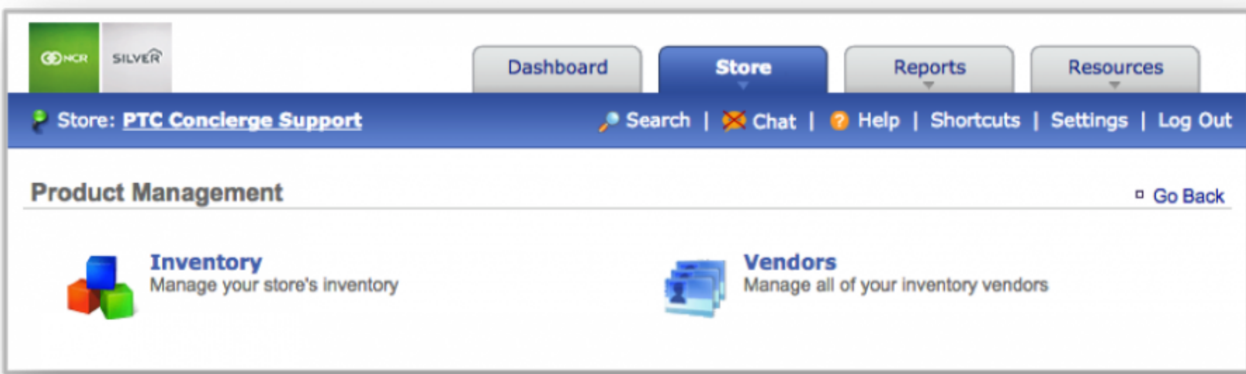
Related Topics:

[How to Assign Training Videos & Certification Tests]

Inventory Management

Effective inventory management can help to reduce cost of goods (COGs) by quickly managing your inventory through the NCR Console platform.

> ! **Important:** If you are entering inventory for the very first time, you must ***ADD Inventory*** for all items you have on hand. Do **NOT** *Take Inventory* first. Adding inventory first ***STARTS*** your inventory.



In this section you will find the following resources:

General

Add Inventory: How to add inventory.
Take Inventory: How to take inventory (raw ingredients/goods) to Console.
How to Hide or Display Items: How to hide or display inventory items.

Manage Products

Manage Inventory: How to manage your inventory in the system.
How to Select a Unit of Measure: How to select and create a unit of measure.
Correcting Errors: How to correct errors after you've added or taken inventory.
How to Export Inventory: How to export your inventory database.

GLOSSARY OF TERMS

- **Add Inventory:** Occurs when you receive an order.
- **Take Inventory:** When you take the inventory of what you have *on hand* the day you take inventory (*which may include recent deliveries*).
- **On Hand:** A snapshot of what you currently have in inventory.
- **Theoretical On Hand:** Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items must be tied to the POS to determine *Theoretical On Hand* totals.
- **Auto Depletion:** When an item that correlates to a recipe is rung up on the POS, that item will auto-deplete from inventory to give you what you should *actually* have on hand. *Note: the item must be part of a recipe that is also tied to the POS.*
- **Actual Inventory:** Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory.
- **View History:** Provides you with historical data to show how Theoretical On Hand totals were calculated.
- **Cost of Goods (COGs):** The value of goods sold during a particular period of time.
- **Inventory Discrepancy:** Depicts actual vs. ideal inventory.

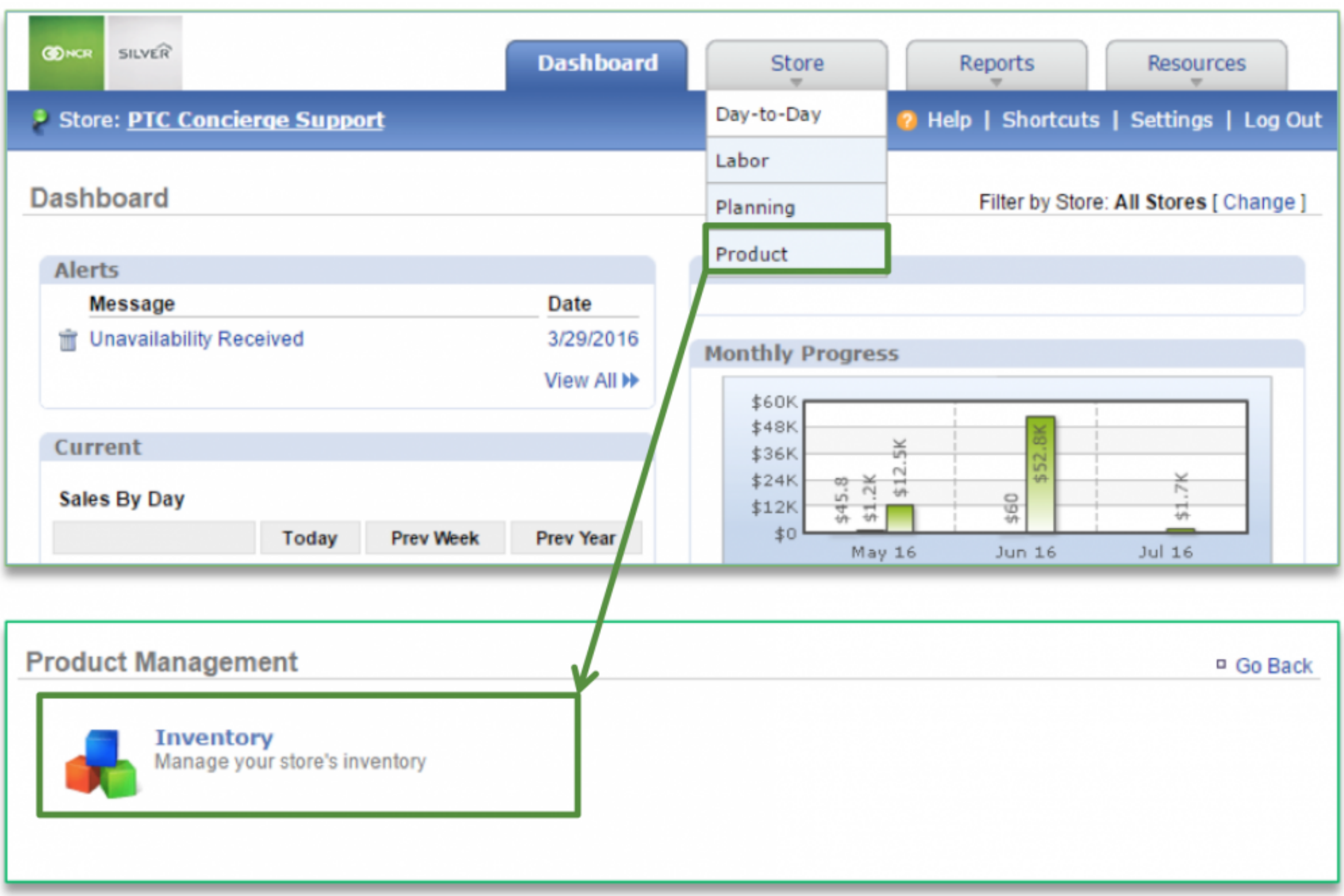
Add Inventory

In this module, you will learn:

- How to add inventory (raw ingredients/goods) to Console

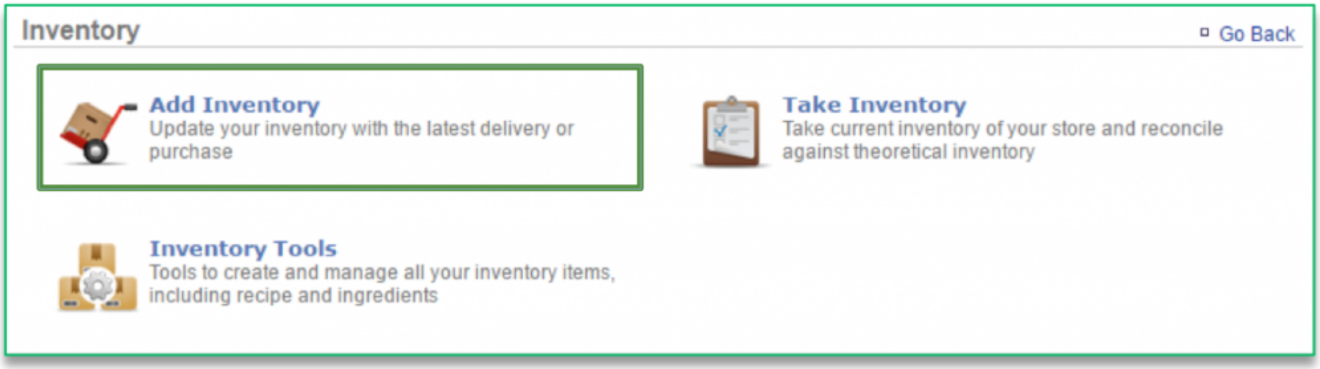
Adding Inventory

To add inventory you will need to navigate to the **Product Management** module and click **Inventory**.



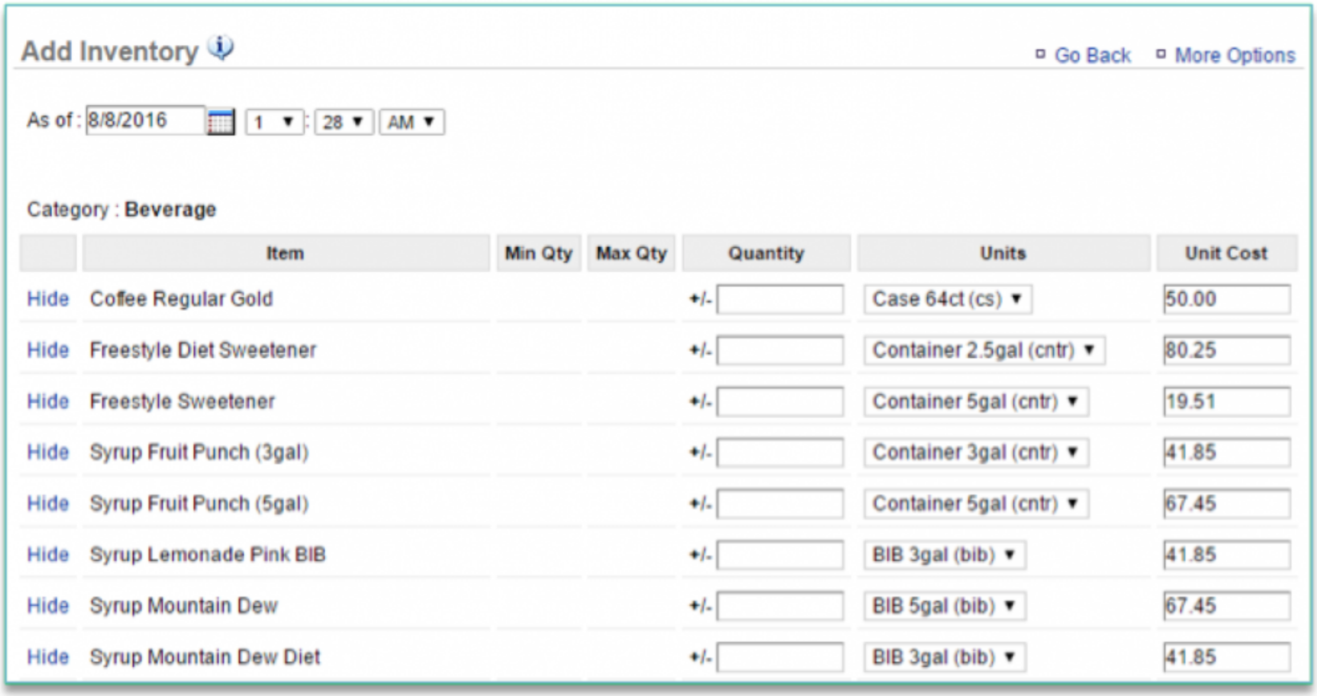
To Add Inventory

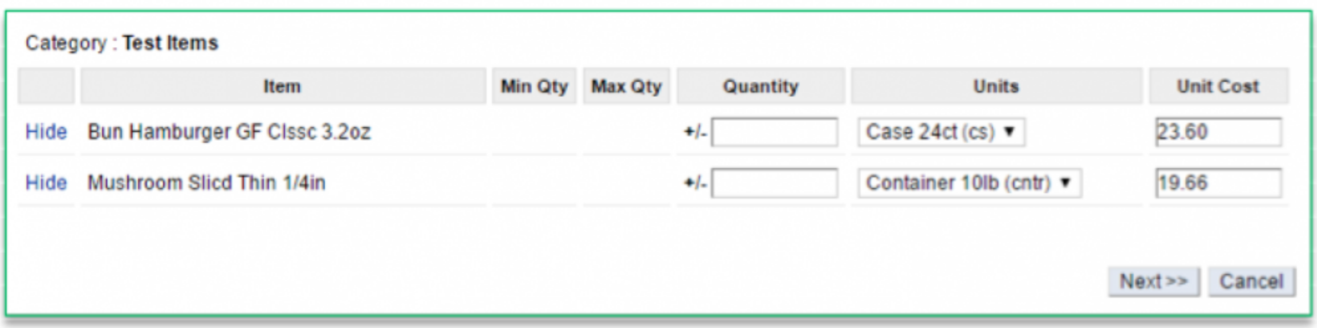
1. Click **Add Inventory**



2. Click the calendar icon to the right of **As of** to select the date and enter the time of the delivery
    a. It's important the date you enter reflects the date that you **actually received the delivery** of ingredients/goods (even if it is not the date that you are adding inventory to the system)
    b. Inventory should always be entered in the sequence of events it occurred
3. Enter quantity of all items received
4. Select the unit size of each item received
5. Adjust the unit cost for each item received
    a. The unit cost should always reflect the unit size that is shown
        i. For example, if one case containing 100 gadgets costs $100, each gadget costs $1. The unit size for a case should be **Case** and the **Unit Cost** should be $100. However, if you change the unit size to Each the unit cost should be changed to $1 so that the totals correctly calculate costs.

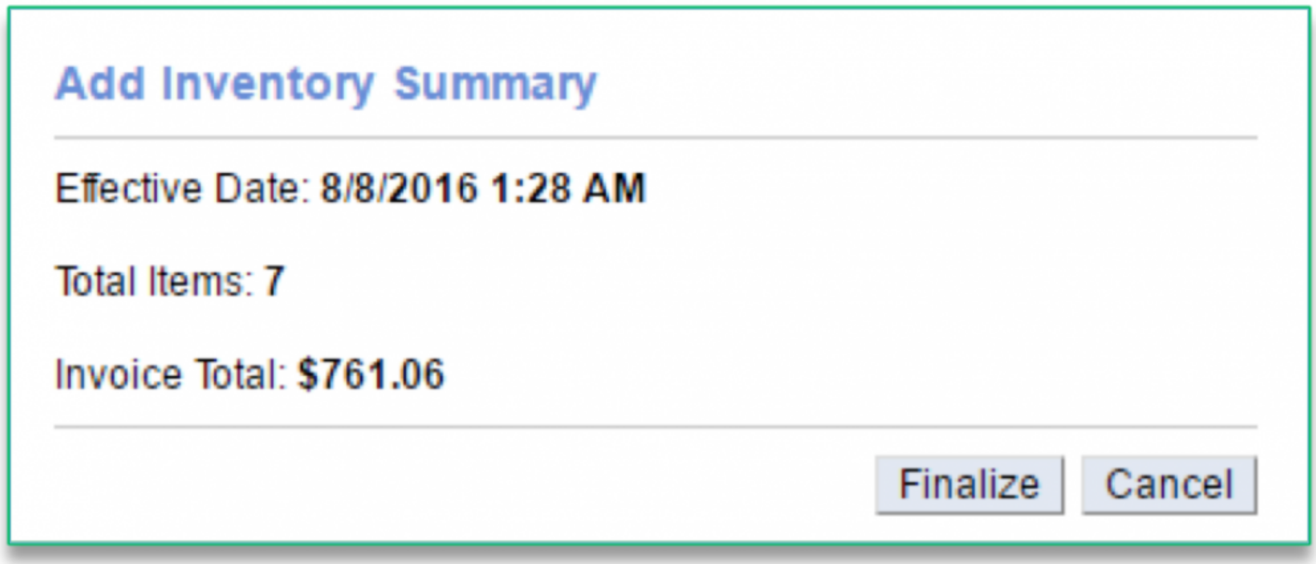
6. Click **Next**





7. A summary of your add will be reflected in a floating window

8. Click **Finalize**



Related Topics:

Correct an Inventory Add

Take Inventory

How to Hide or Display Items

Manage Inventory

How to Add a Custom a Unit of Measure

How to Export Inventory: How to export your inventory database.

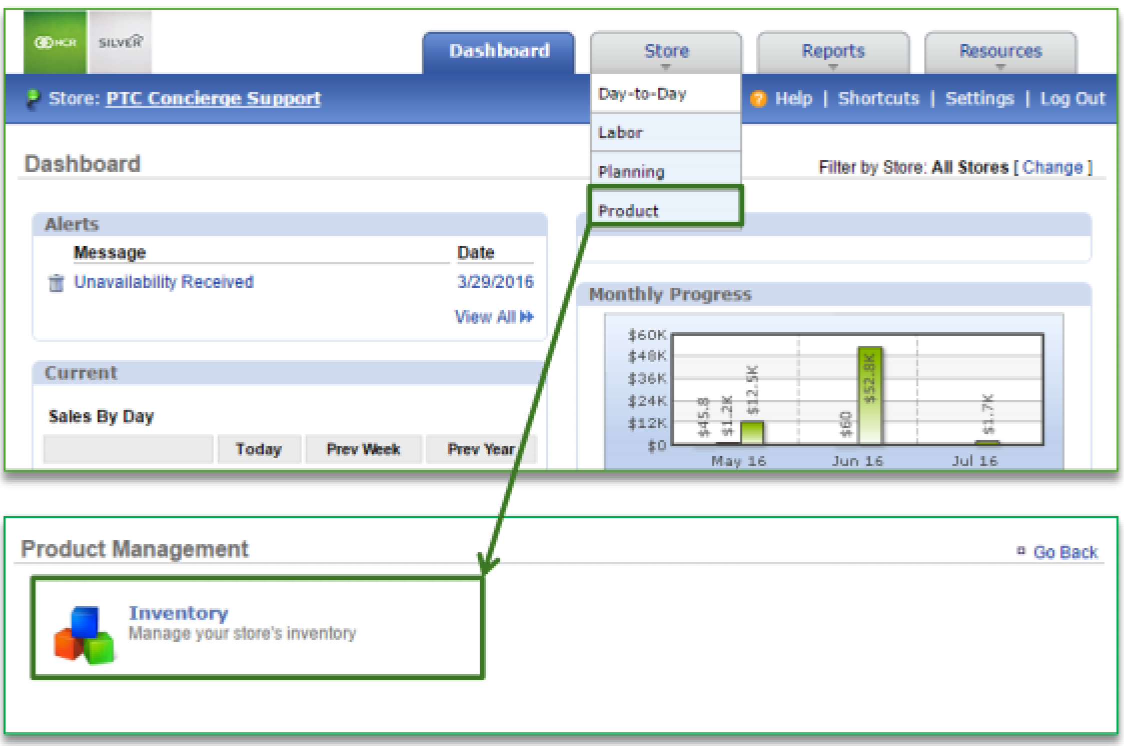
Import Invoices

In this module, you will learn:

- How to import vendor invoices to Add Inventory via the Store side portal.

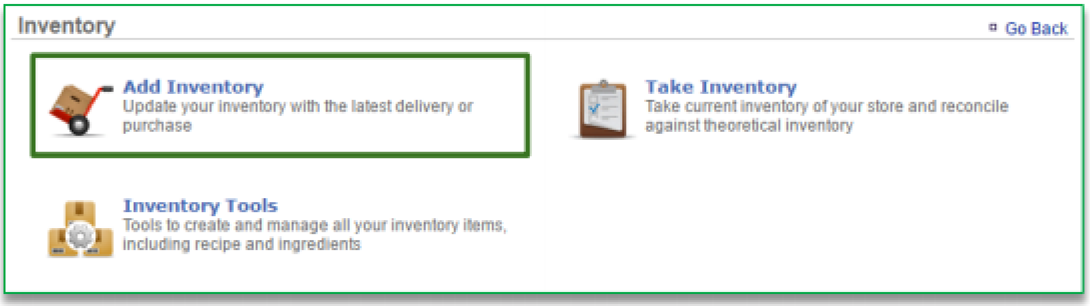
Importing Invoices

The ability to import invoices allows you add items received from vendors into your inventory in bulk with formatted Excel files. To import invoices you will need to navigate to the **Product Management** module and click **Inventory**.

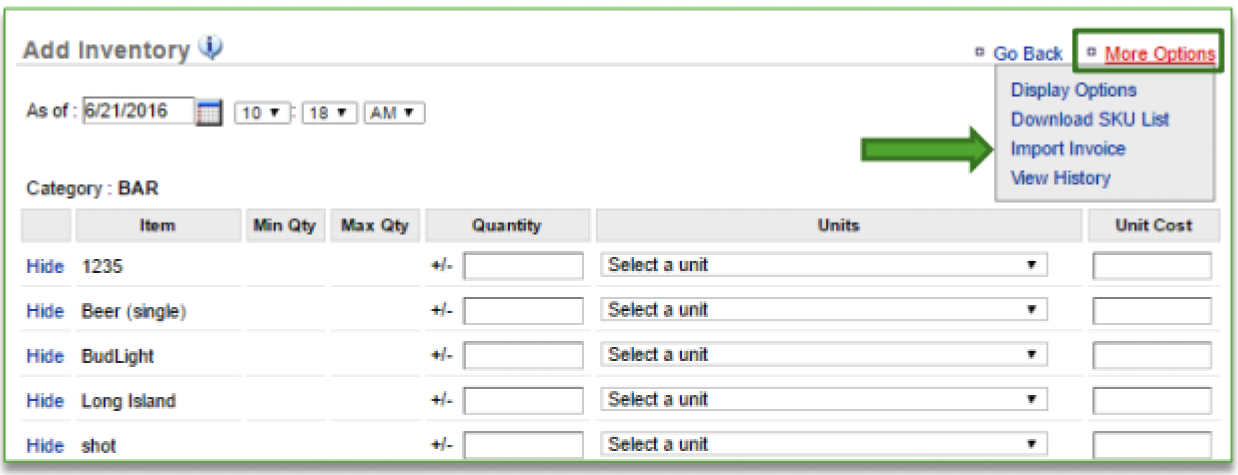


To Upload Invoices

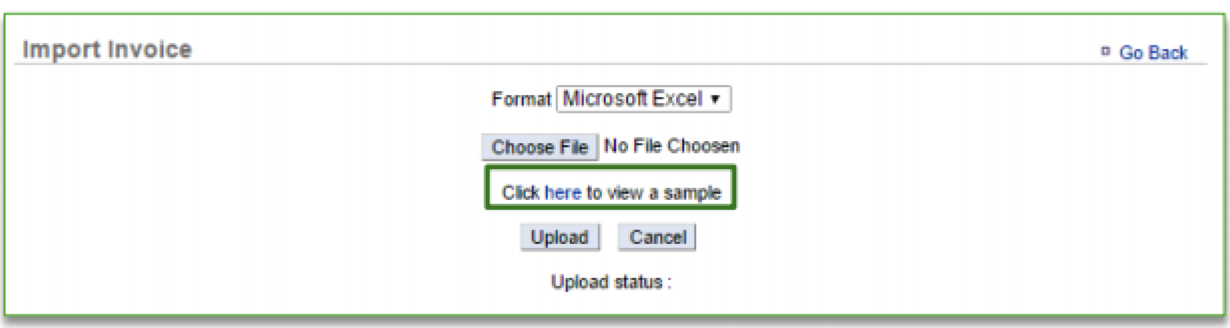
1. Click **Add Inventory**



1. Click **More Options**
2. Click **Import Invoice**



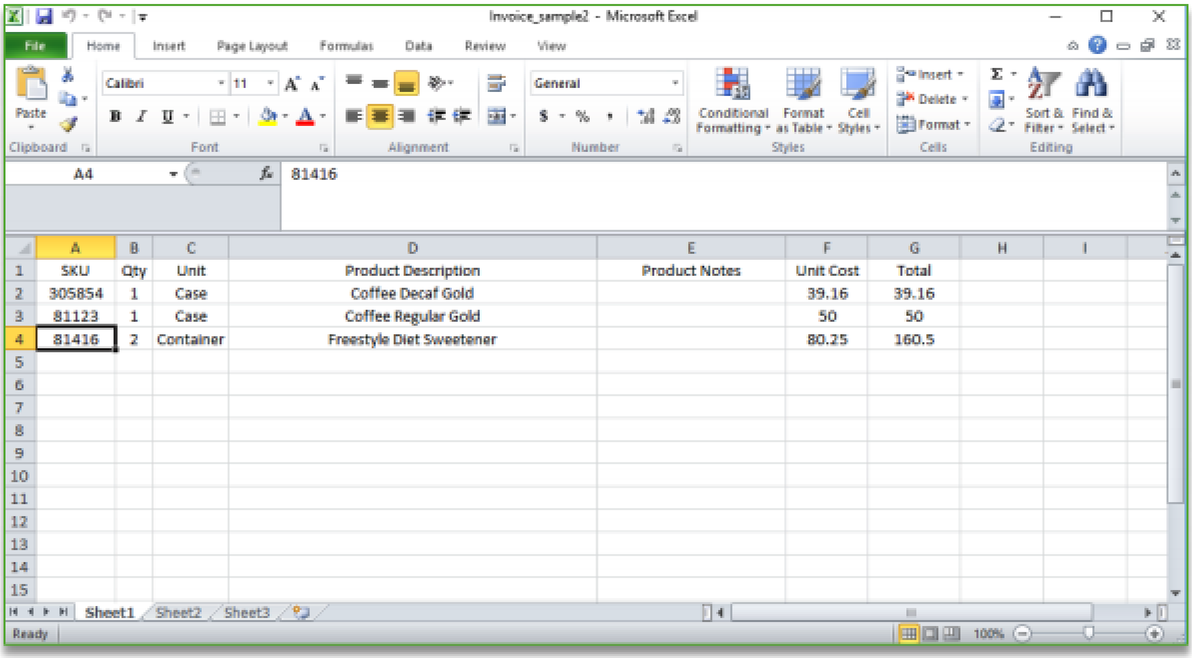
1. Click **here** to download the formatted template.



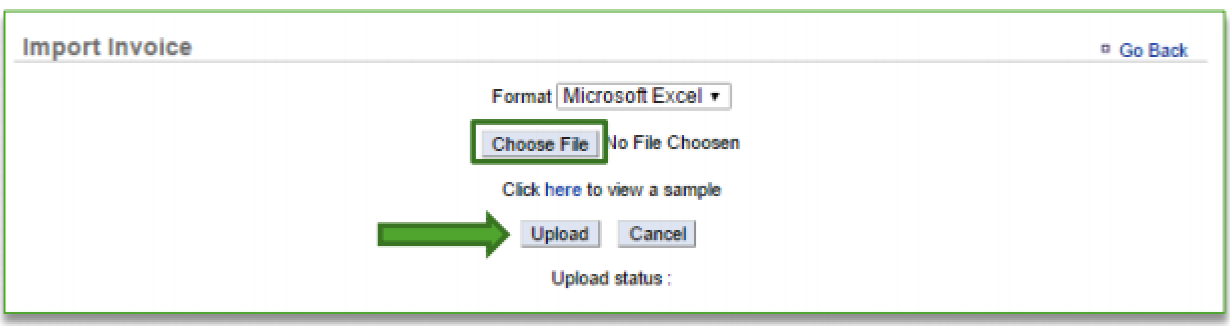
Important reminders about the format of your invoice

1. You **MUST** have SKU numbers set up in Console for each ingredient listed within your invoice
2. Those SKU numbers **MUST** match the SKU numbers listed within your invoice
3. Quantity field **MUST** include the quantity

4. Quantity field **CANNOT** include non-numerical values

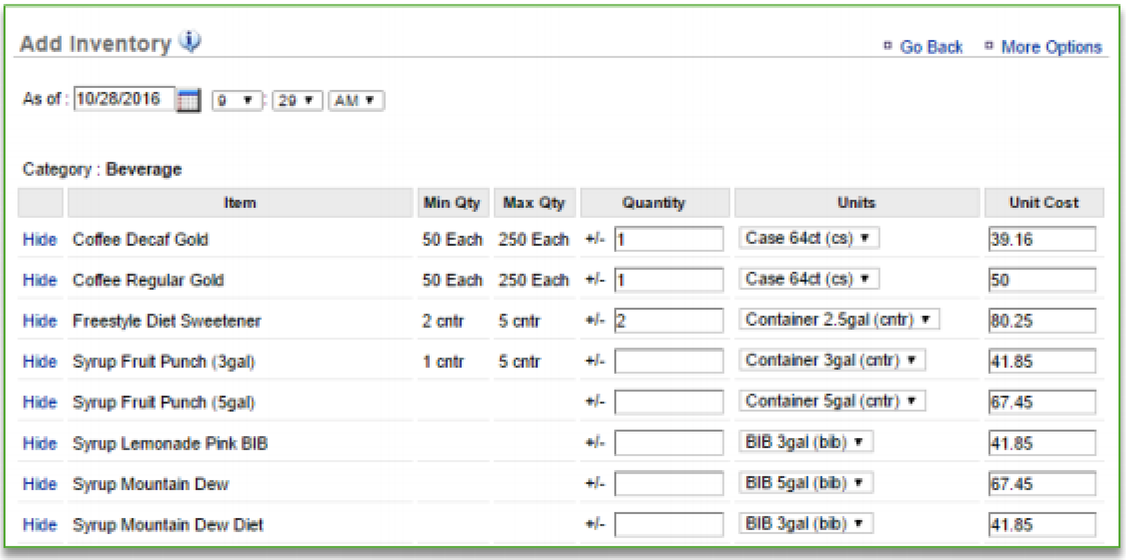


1. Click **Choose File** to select the invoice you wish to upload
2. Click **Upload**



1. You will be redirected to the **Add Inventory** page
    a. This page will be populated with the totals from your imported invoice provided they meet the required format criteria noted above
        i. Those items that do not meet the required criteria will not be imported to show totals
    b. From here you can made additional changes to any of the editable fields, including the date and time
    c. Ensure that the **"As of"** date reflects the date on the invoice
    d. If the **Units** defined in the import file are not an exact match to what is set up in Console, then the largest unit of measure will be populated on the page

2. Click **Next** at the bottom of the page



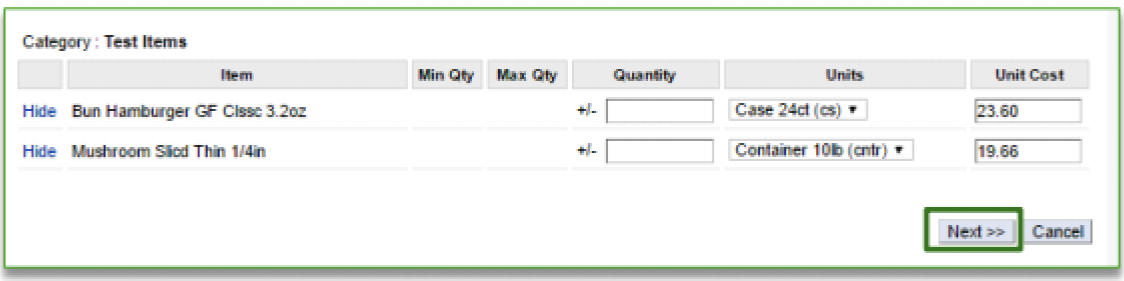
Add Inventory

Go Back · More Options

As of : 10/28/2016 9 : 29 AM

Category : Beverage

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Coffee Decaf Gold	50 Each	250 Each	+/- 1	Case 64ct (cs)	39.16
Hide	Coffee Regular Gold	50 Each	250 Each	+/- 1	Case 64ct (cs)	50
Hide	Freestyle Diet Sweetener	2 cntr	5 cntr	+/- 2	Container 2.5gal (cntr)	80.25
Hide	Syrup Fruit Punch (3gal)	1 cntr	5 cntr	+/-	Container 3gal (cntr)	41.85
Hide	Syrup Fruit Punch (5gal)			+/-	Container 5gal (cntr)	67.45
Hide	Syrup Lemonade Pink BIB			+/-	BIB 3gal (bib)	41.85
Hide	Syrup Mountain Dew			+/-	BIB 5gal (bib)	67.45
Hide	Syrup Mountain Dew Diet			+/-	BIB 3gal (bib)	41.85

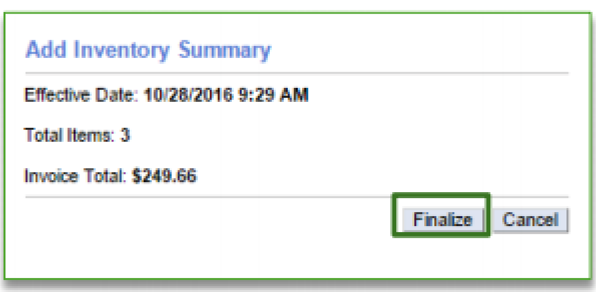


Category : Test Items

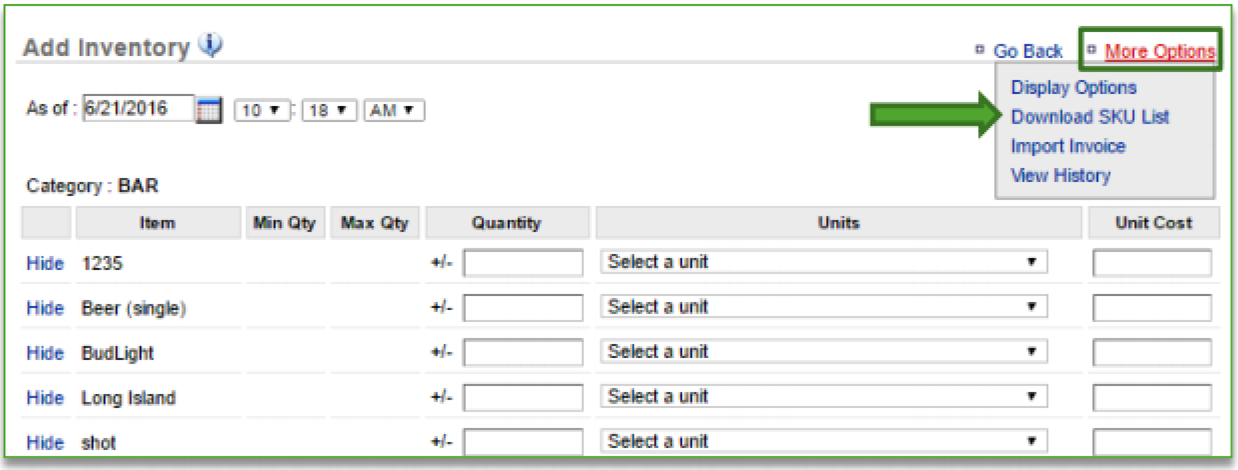
	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Bun Hamburger GF Clssc 3.2oz			+/-	Case 24ct (cs)	23.60
Hide	Mushroom Slicd Thin 1/4in			+/-	Container 10lb (cntr)	19.66

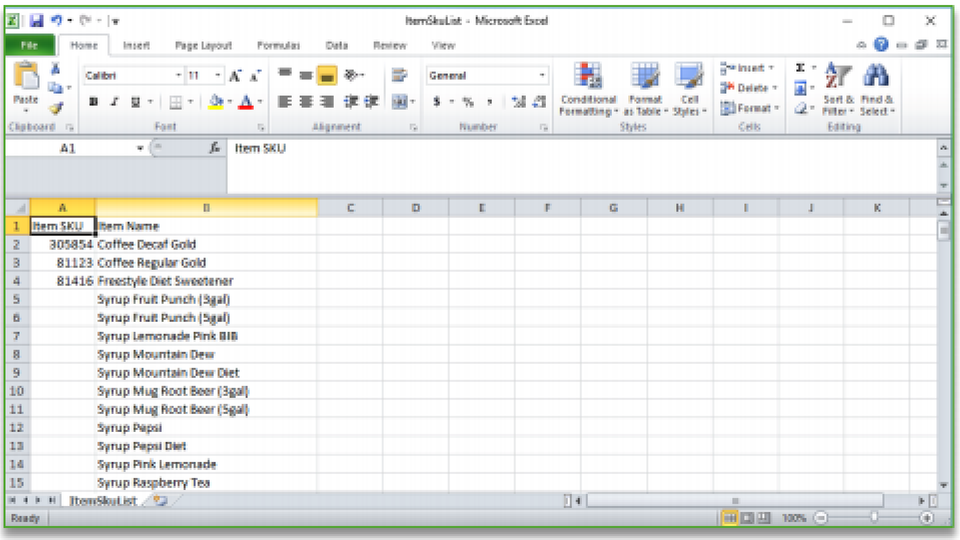
Next >> Cancel

1. A summary of your Add will appear in a pop-up window
2. Click **Finalize**



Note: To ensure that the SKU numbers on your invoice match the SKU numbers in the application, click **More Options** and **Download SKU List**. This will generate a file that allows you to compare what you have set up for each item to the SKU listed on your invoice.





- **Click here to see the full details**

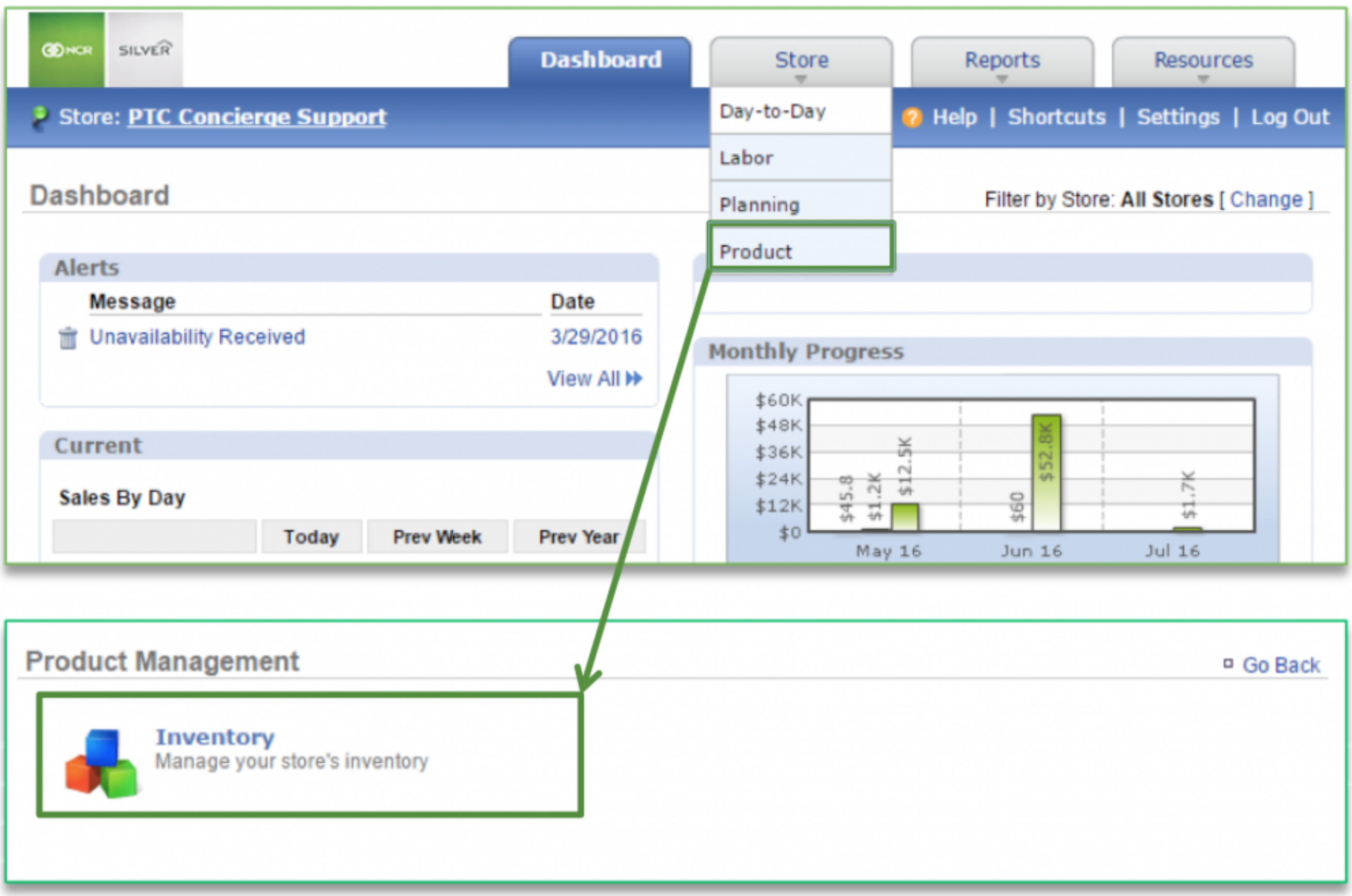
Correcting an Inventory Add

In this module, you will learn:

- How to correct an inventory add (for raw ingredients/goods) within Console

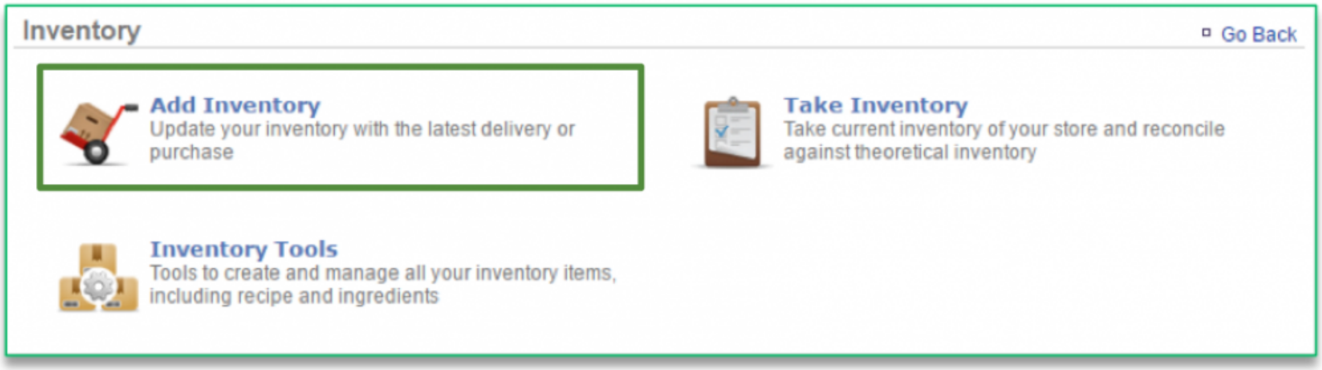
Correcting Inventory Adds

To correct an inventory add you will need to navigate to the **Product Management** module and click **Inventory**.

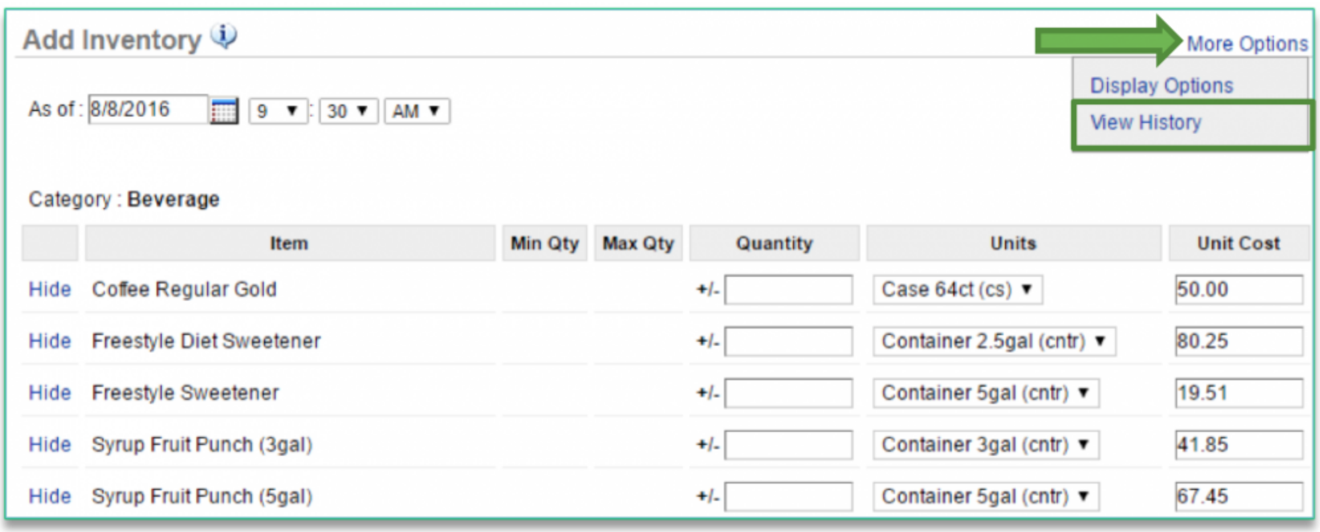


To Correct an Inventory Add

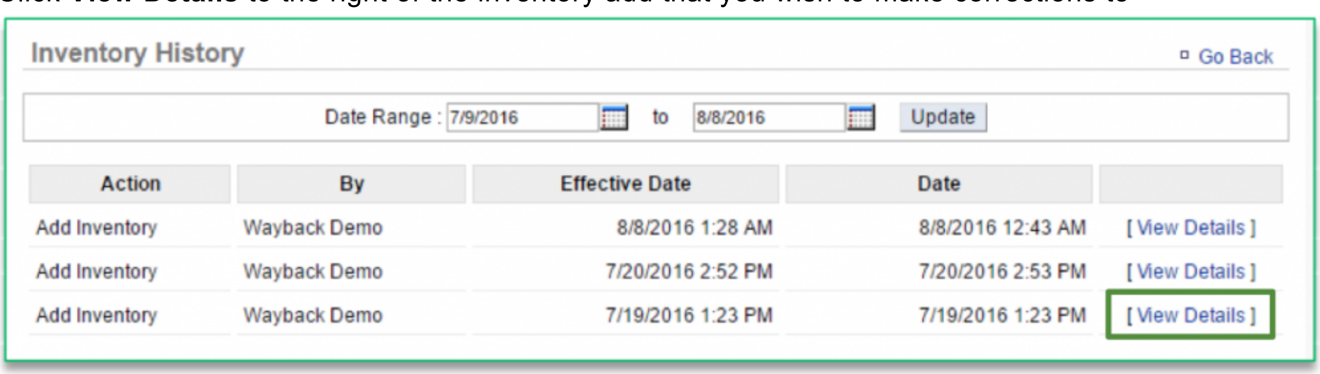
1. Click **Add Inventory**



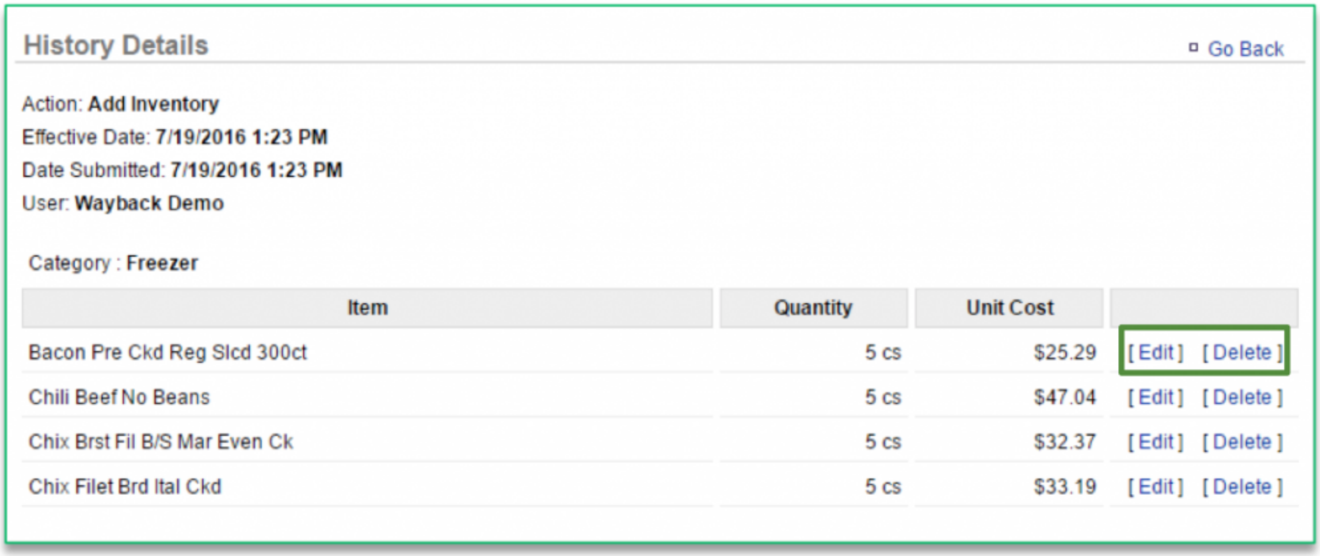
2. Click **More Options**
3. Click **View History**



4. Click **View Details** to the right of the inventory add that you wish to make corrections to

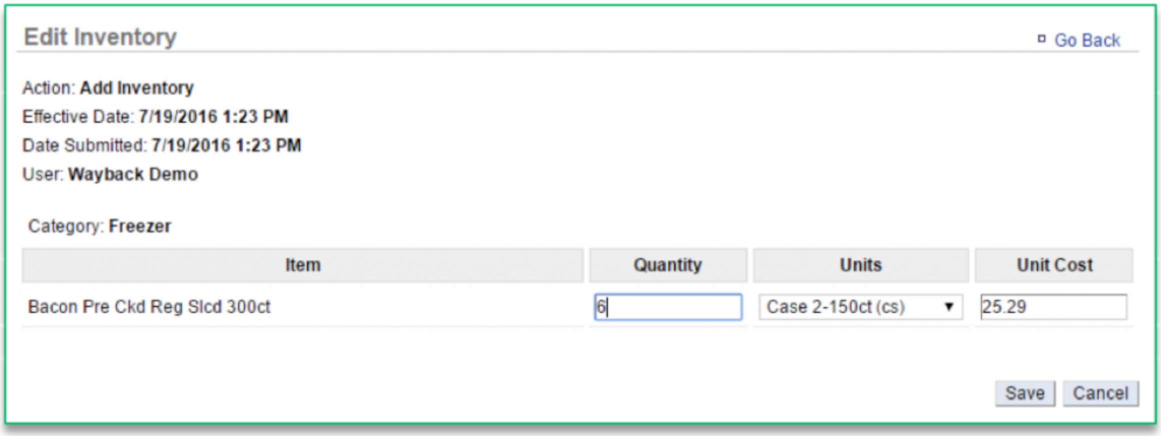


5. Click **Edit** or **Delete** to right of the item you need to correct



   a. For edits
      i. Adjust the quantity and/or price

ii. Click **Save**



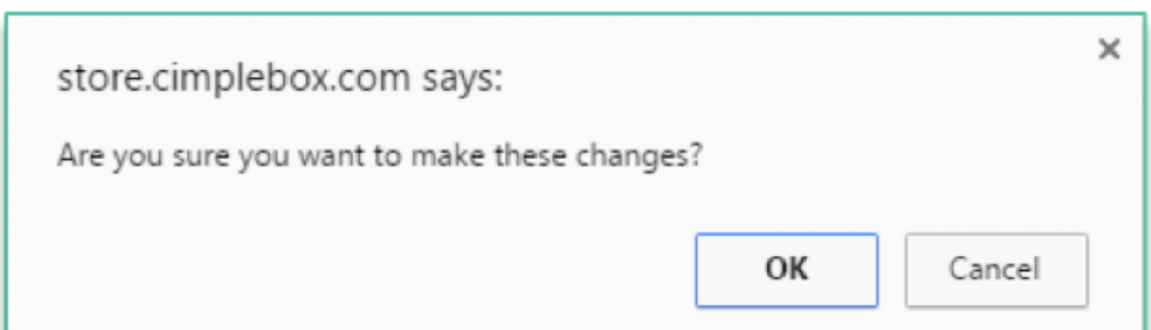
IMPORTANT REMINDERS ABOUT ADDING OR CORRECTING INVENTORY
The default UNIT shown (typically a case size) will always reflect the *largest unit of measure* for that item. The **UNIT COST** is always associated on the largest unit of measure for that item. If you change the **UNIT**, you must also change the **UNIT COST**.

For example:

Item	**Units**	**Unit Cost**
Item A	Case (10 packs of 100)	Unit Cost: $100 *per case*
	Pack of 100	Unit Cost: $10 *per pack*
	Each	Unit Cost: $0.10 *per item*

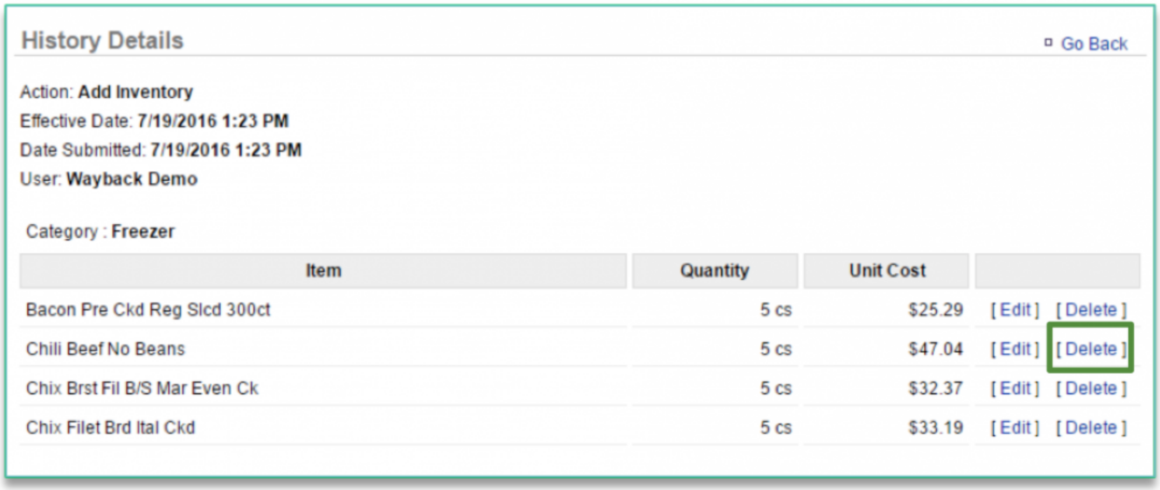
When Adding Inventory, use the invoice you received with your order as your point of reference. Enter the quantity and unit cost shown on the invoice for what you received. The invoice total should match the inventory total; excluding tax, shipping charges and/or items that are not part of the inventory shown on CimpleBox. Make sure your totals match before clicking Finalize.

iii. You will be asked to confirm your choice. Click **OK**

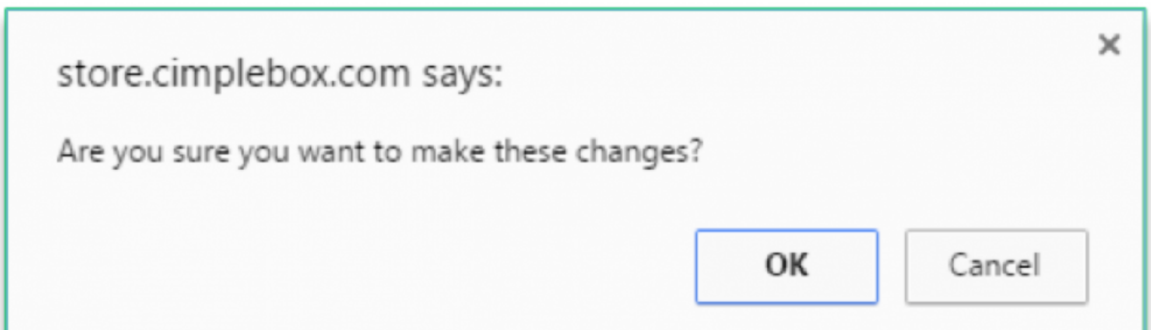


b. For deletions

i. Click **Delete** to the right of the item



ii. You will be asked to confirm your choice. Click **OK**



Related Topics:

[Add Inventory]
[Take Inventory]
[How to Hide or Display Items]
[Manage Inventory]
[How to Add a Custom a Unit of Measure]
[How to Export Inventory:] How to export your inventory database.

Take Inventory

In this module, you will learn:

- How to take inventory (raw ingredients/goods) to Console.

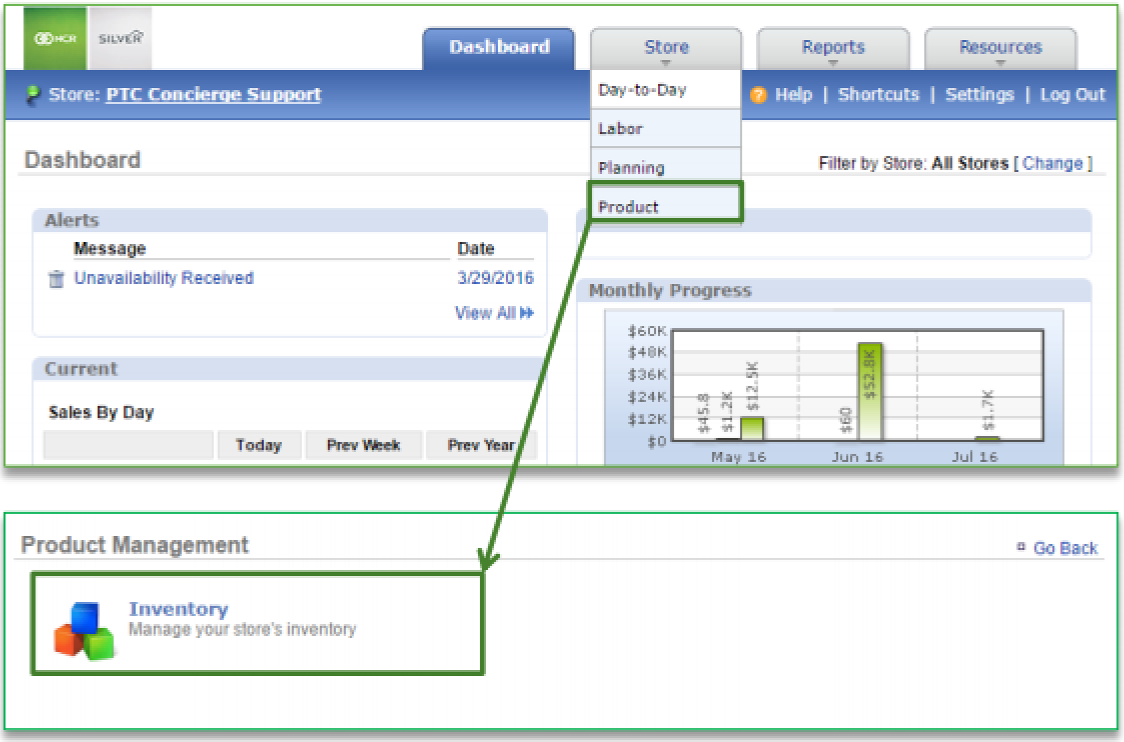
Taking Inventory

Take Inventory means taking inventory of what you have *on hand* the day you typically take inventory (*which may include recent deliveries*).

It can also be used to establish a starting inventory. If you are establishing your initial inventory for products you already have on hand, you must perform a "**Take**" to set your starting quantities. This will allow you to tell the system what you have on hand without skewing reporting costs.

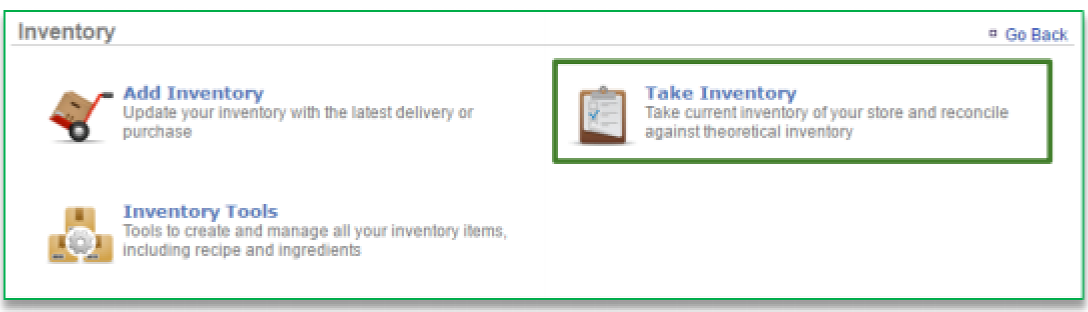
Note: If you are a new business with **NO** starting quantities, you will need to instead perform an "**Add Inventory**" as you receive order(s).

To take inventory you will need to navigate to the **Product Management** module and click **Inventory**.



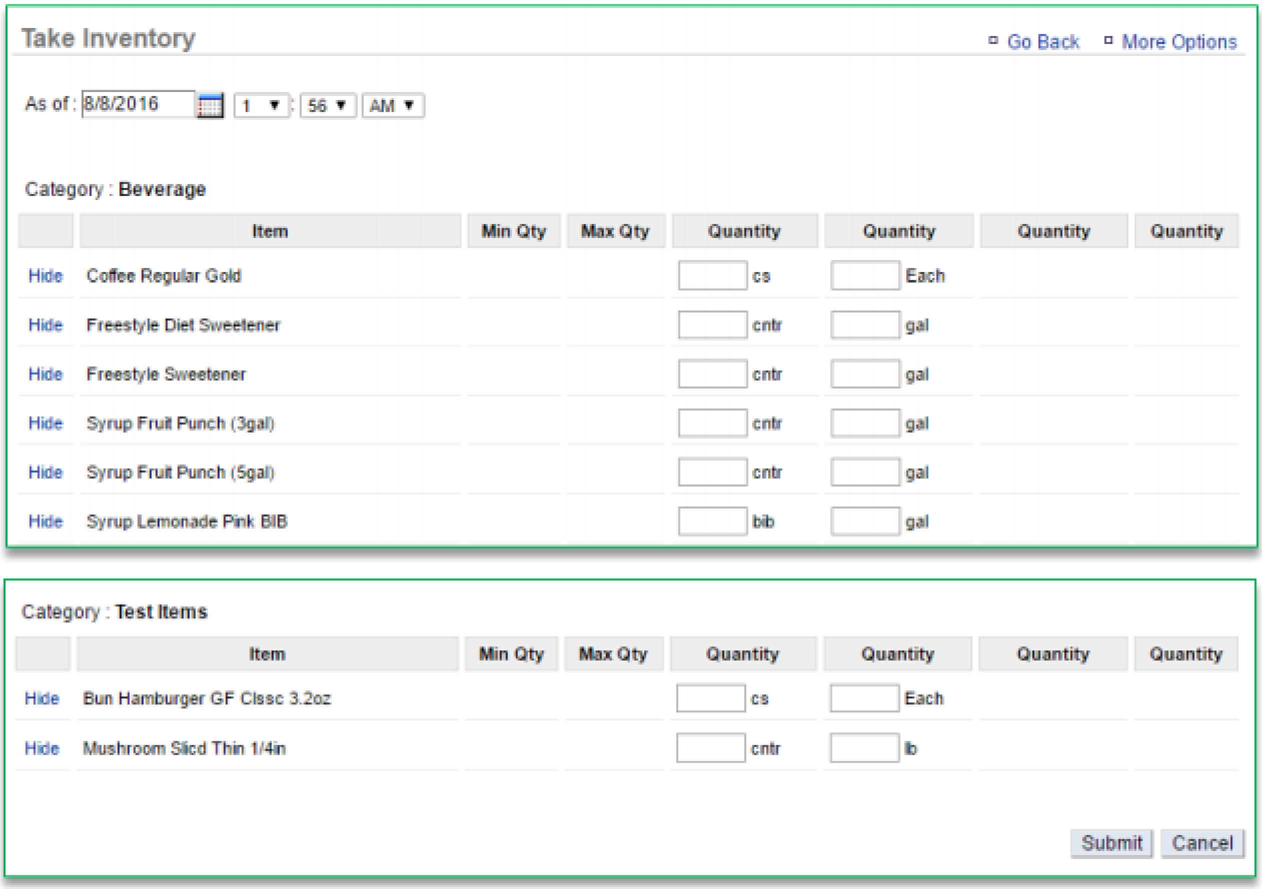
To Take Inventory

1. Click **Take Inventory**



2. Click the calendar icon to the right of **As of** to select the date and enter the time you took inventory
    a. It's important the date you enter reflects the date that you **actually took inventory** of ingredients/goods (even if it is not the date that you are entering the totals into the system)
    b. Inventory should always be entered in the sequence of events it occurred
3. Enter quantity of all items received in the applicable fields
    a. All units of measure that are set up for the items in your inventory will be shown so that you can take inventory off of multiple units of measure for the same item

4. Click **Submit**


Take Inventory

Go Back   More Options

As of : 8/8/2016 1 : 56 AM

Category : Beverage

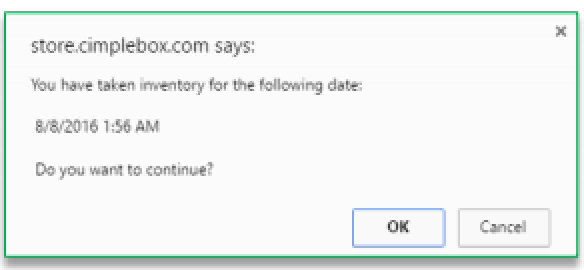
	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Coffee Regular Gold			cs	Each		
Hide	Freestyle Diet Sweetener			cntr	gal		
Hide	Freestyle Sweetener			cntr	gal		
Hide	Syrup Fruit Punch (3gal)			cntr	gal		
Hide	Syrup Fruit Punch (5gal)			cntr	gal		
Hide	Syrup Lemonade Pink BIB			bib	gal		

Category : Test Items

	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Bun Hamburger GF Clssc 3.2oz			cs	Each		
Hide	Mushroom Slicd Thin 1/4in			cntr	lb		

Submit Cancel

5. You will be asked to confirm your choice. Click **OK**


store.cimplebox.com says:

You have taken inventory for the following date:

8/8/2016 1:56 AM

Do you want to continue?

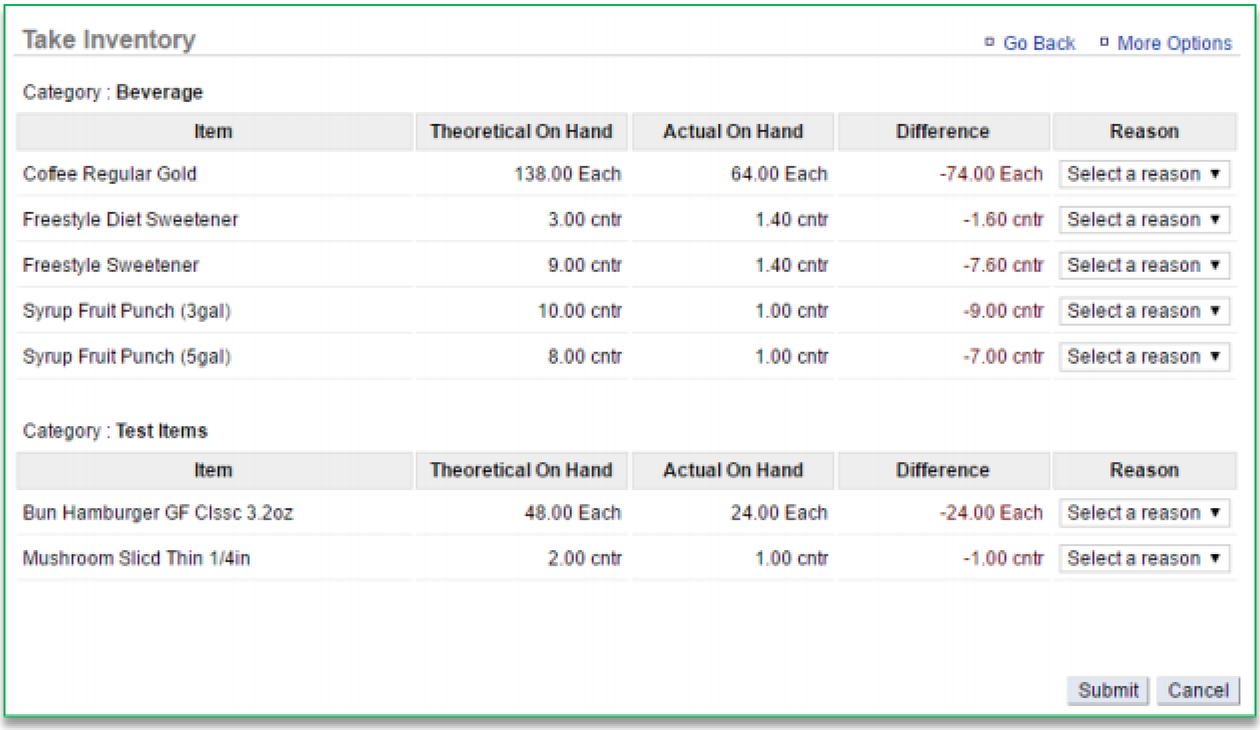
OK Cancel

p(banner important). **Important:** If you are entering inventory for the very first time, you must ***ADD Inventory*** for all items you have on hand. Do **NOT** *Take Inventory* first. Adding inventory first ***STARTS*** your inventory.

6. A summary of your take will appear
   a. You can select a reason for the take of each item by clicking the dropdown menu to the right of the item (optional)

b. **Important:** If you are establishing an initial inventory, you must select "**Initial Inventory**" in the dropdown menu. This will allow you to tell the system what you have on hand without skewing reporting costs.

7. Click **Submit**



Take Inventory ▫ Go Back ▫ More Options

Category : **Beverage**

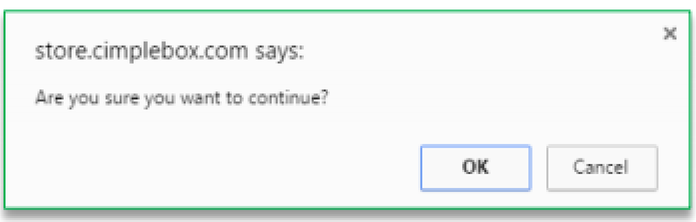
Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Cofee Regular Gold	138.00 Each	64.00 Each	-74.00 Each	Select a reason ▼
Freestyle Diet Sweetener	3.00 cntr	1.40 cntr	-1.60 cntr	Select a reason ▼
Freestyle Sweetener	9.00 cntr	1.40 cntr	-7.60 cntr	Select a reason ▼
Syrup Fruit Punch (3gal)	10.00 cntr	1.00 cntr	-9.00 cntr	Select a reason ▼
Syrup Fruit Punch (5gal)	8.00 cntr	1.00 cntr	-7.00 cntr	Select a reason ▼

Category : **Test Items**

Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Bun Hamburger GF Clssc 3.2oz	48.00 Each	24.00 Each	-24.00 Each	Select a reason ▼
Mushroom Slicd Thin 1/4in	2.00 cntr	1.00 cntr	-1.00 cntr	Select a reason ▼

Submit Cancel

8. You will be asked to confirm your choice. Click **OK**



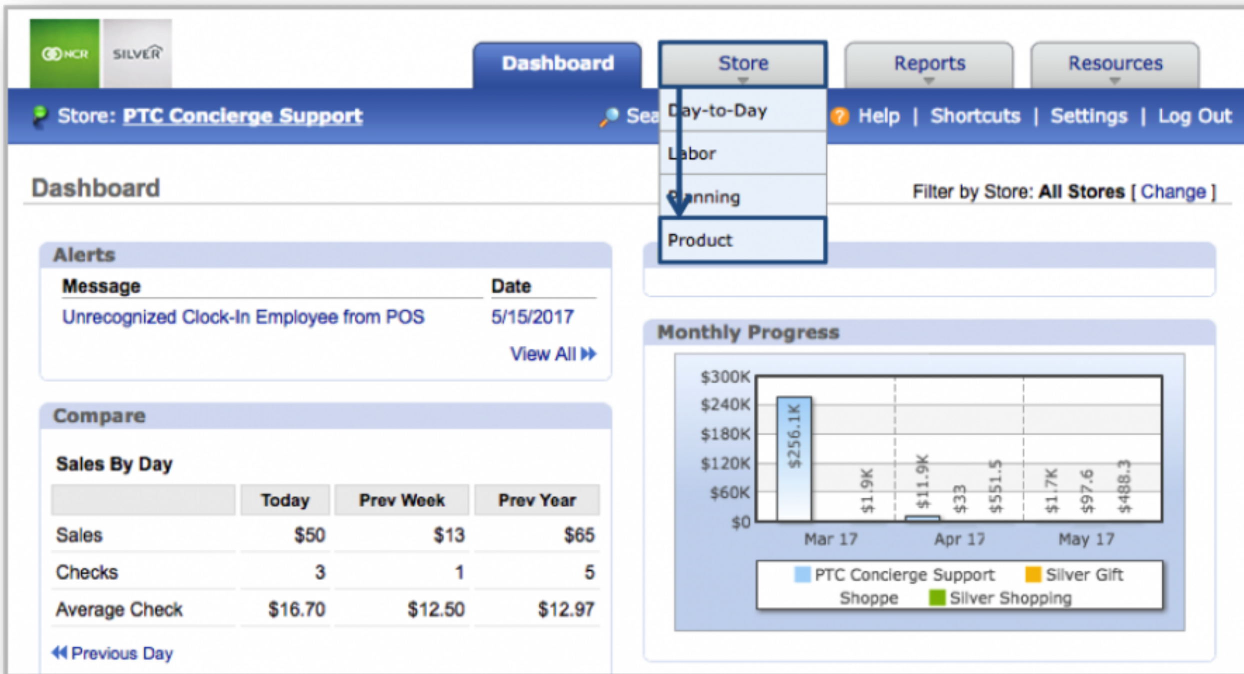
- **Click here to see the full details**.

Hide or Display Items

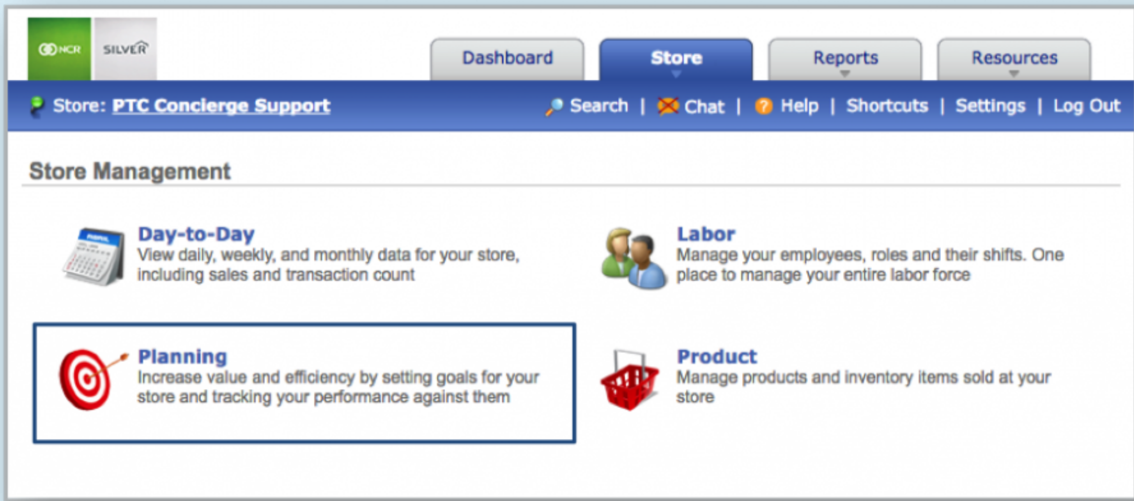
The purpose of this section is to illustrate how to hide or display items within Inventory. You can do this through the Adding, Taking or Managing of Inventory.

Hiding or Displaying Inventory

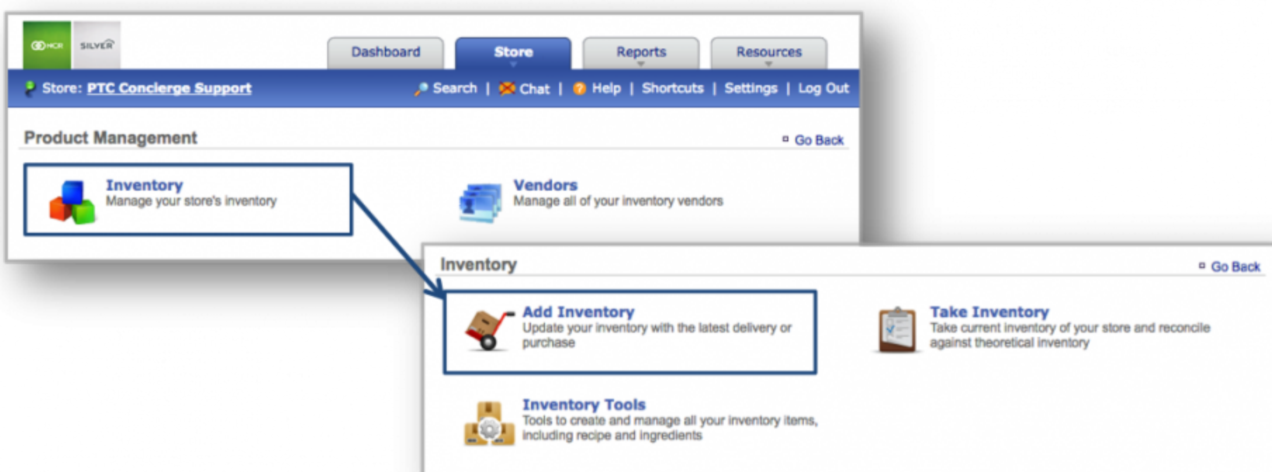
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Product***.



Hint: You can also access Inventory by clicking on the ***Store*** tab and then on ***Product*** from the Store Management screen.

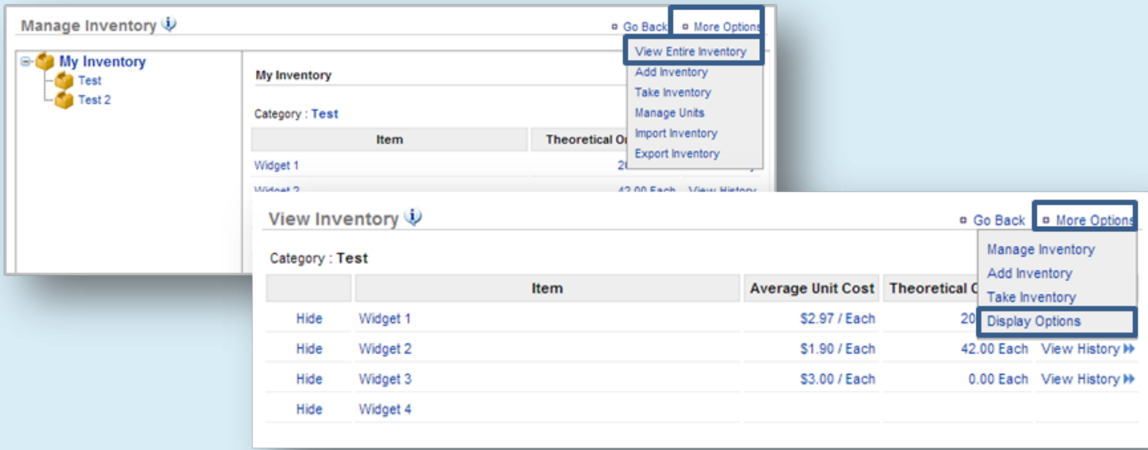


STEP 2: From the Product Management screen, click ***Inventory***. Select either ***Take Inventory*** or ***Add Inventory***.



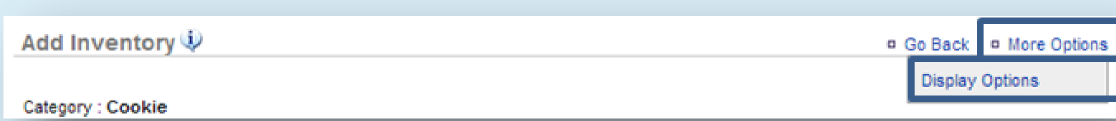
If you choose to hide inventory via the *Managing Inventory* section, click ***More Options***, and then ***View Entire Inventory***. From this screen, click ***More Options***, and then ***Display***

Options.

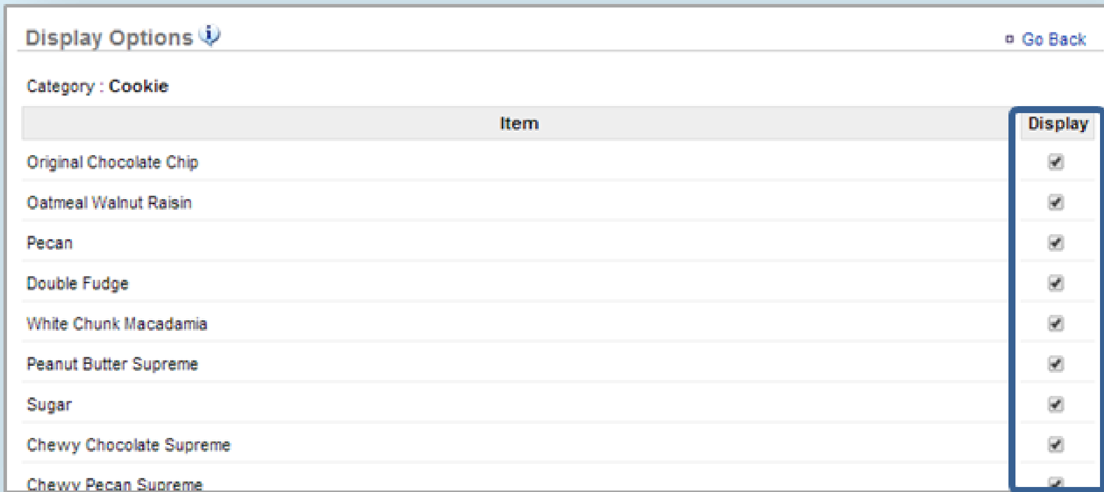


STEP 3: Click the ***Hide*** link to the left of the item in the Inventory.

Hint: You can also click ***More Options*** and then ***Display Options*** to deselect items so they no longer appear in your list.



If you choose to hide items from the ***Display Options*** screen, click the box to uncheck those items you wish to hide.



! Once an item has been hidden from you, you will need to access the ***Display Options*** screen to recheck those items you wish to make visible again.

Related Topics:

Add Inventory

Take Inventory

Manage Inventory

How to Add a Custom a Unit of Measure

How to Export Inventory: How to export your inventory database.

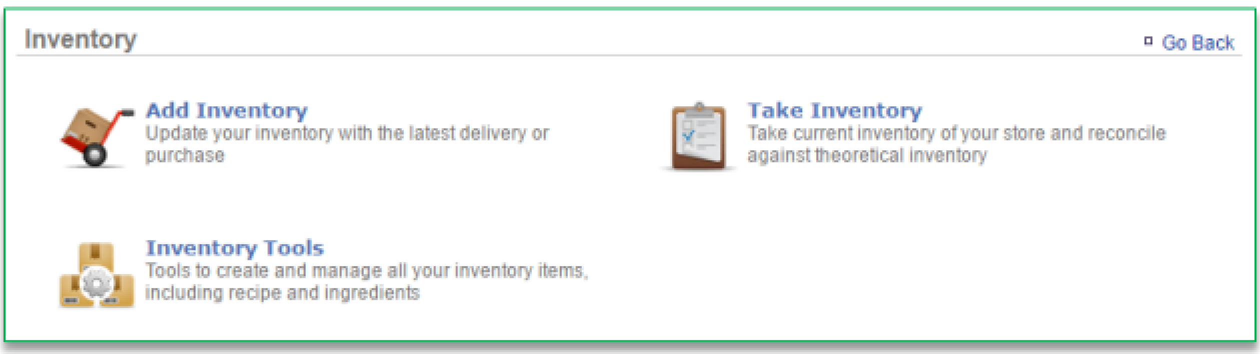
Manage Inventory

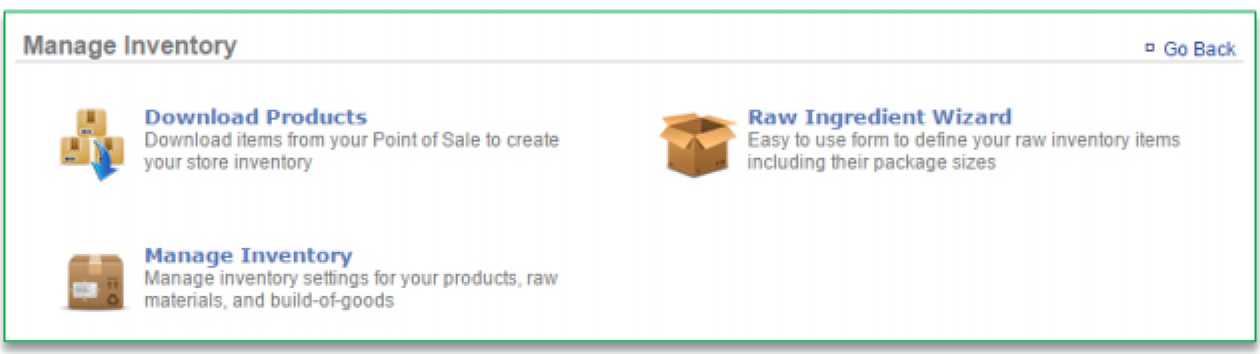
In this module, you will learn about:

- Inventory Management features
- Glossary of terms
- Getting started with the inventory management platform

Inventory Management Features

Effective inventory management can help to reduce the Cost of Goods (COGs) by quickly managing your inventory through the Console platform.





- *Add Inventory*: Allows you to update your inventory of raw ingredients with the latest deliveries or purchases
- *Take Inventory*: Allows you to take current inventory of raw ingredients to reconcile what you have left so that you can compare that against theoretical inventory
- *Inventory Tools*: Allows you to create and manage all inventory items, which includes recipes and raw ingredients. Those tools include:

  - *Download Products*: Allows you to connect to your POS so that you can download your POS menu into a Product (Recipe) folder within Console
- *Doing so gives you the ability to create recipes based off of the raw ingredients that you add to the system*
  - *Raw Ingredient Wizard*: Allows you to create all of the raw ingredients that you carry
  - *Manage Inventory*: Provides you with access to all ingredients and products that have been created or downloaded to the inventory platform

Glossary of Terms

You will encounter the following inventory terms as you navigate the inventory management feature.

- **Add Inventory:** Occurs when you receive an order
- **Take Inventory:** When you take inventory of what you have on *hand* the day you typically take inventory (*which may include recent deliveries*), or to establish a starting inventory
  - If you are establishing your initial inventory for products you already have on hand, you can perform a "**Take**" to set your starting quantities. This will allow you to tell the system what you have on hand without skewing reporting costs
- **On Hand:** A snapshot of what you *currently* have in inventory
- **Theoretical On Hand:** Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items (products/recipes) must be tied to the POS to determine *Theoretical On Hand* totals
- **Auto Depletion:** When an item that correlates to a recipe is rung up on the POS that item will auto-deplete from inventory to give you what you should *actually* have on hand. *The item must be part of a recipe that is also tied to the POS*
- **Actual Inventory:** Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory
- **View History:** Provides you with historical data to show how Theoretical On Hand totals were calculated
- **Cost of Goods (COGs):** The value of goods sold during a particular period of time
- **Inventory Discrepancy:** Depicts actual vs. ideal inventory

Getting Started With Inventory Management

Complete the below checklist to get the most out of what the Inventory Management platform has to offer.

1. Download products from the **Manage Inventory** platform (see **Download Products and Download Modifiers training modules**)

    a. These products and modifiers are a duplicate of the buttons that have been set up on your POS
    b. These products and modifiers are your ‘recipes’ which you will apply raw ingredients to for auto-depletion purposes
2. Create your complete list of raw ingredients via the Raw Ingredient Wizard (see **Raw Ingredient Wizard training module**)
    a. Complete the **Creating Custom Units of Measure training module** which supports the management of raw ingredients
3. Complete recipe creation for all of your products (see the **Recipe Creation training module**)
4. Establish par levels (see **Establishing Par Levels training module**)
5. **Take Inventory** to establish your starting quantities (see **Take Inventory training module**)
    a. If you are a new business with **NO** starting quantities, you will need to instead perform an “**Add Inventory**” as you receive order(s)
6. **Add Inventory** (see **Add Inventory training module**) for any new deliveries you receive
    a. **Important:** If you have reconciled inventory (performed a “**Take**”), you can an “**Add**” prior to the date of your last “**Take**,” as long as it is within 30 days of the current date
7. **Take Inventory** as you normally would to reconcile inventory (see **Take Inventory training module**)

- **Click here to see the full details**.

Download Modifiers

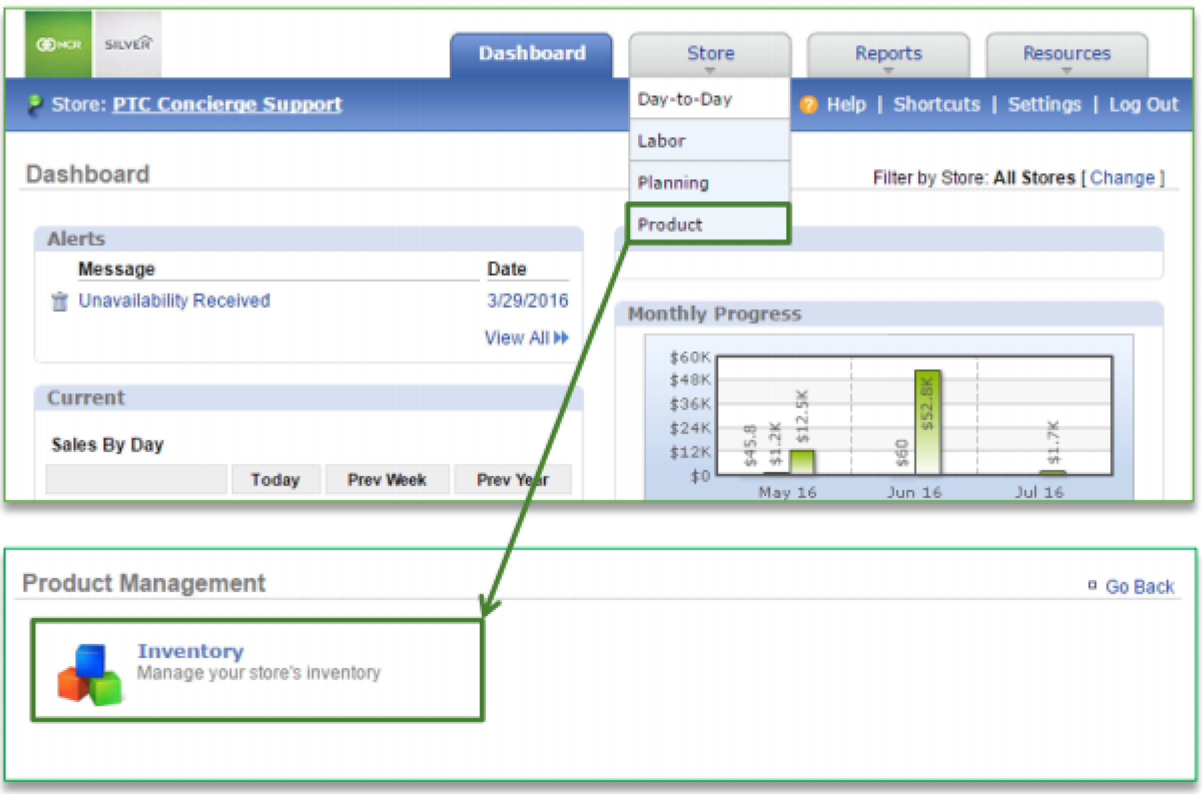
In this module, you will learn:

- How to download modifiers (for recipes purposes) to the inventory platform within Console

Downloading Products to Inventory

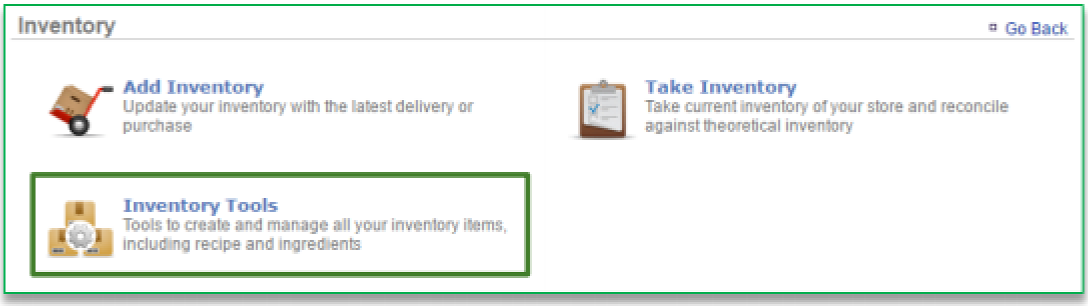
Modifiers within Console refer to those modifiers that are tied to product items within the menu on your Point of Sale (POS). Modifiers are made up of raw ingredients that will also need to be set up within Console for effective inventory management.

To download modifiers you will need to navigate to the **Product Management** module and click **Inventory**.

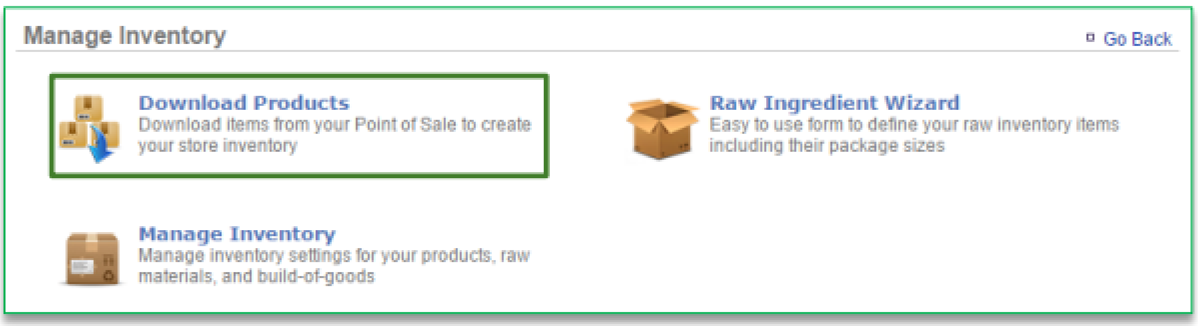


To Download Products

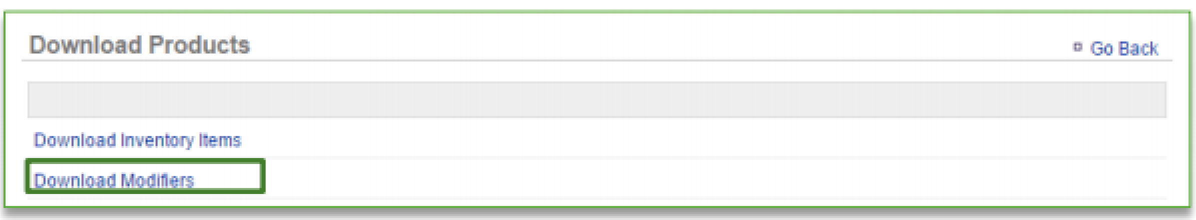
1. Click **Inventory Tools**



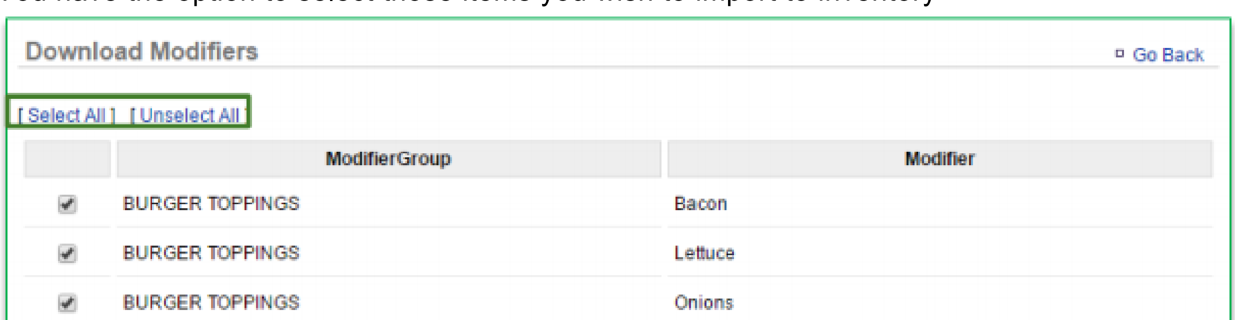
2. Click **Download Products**



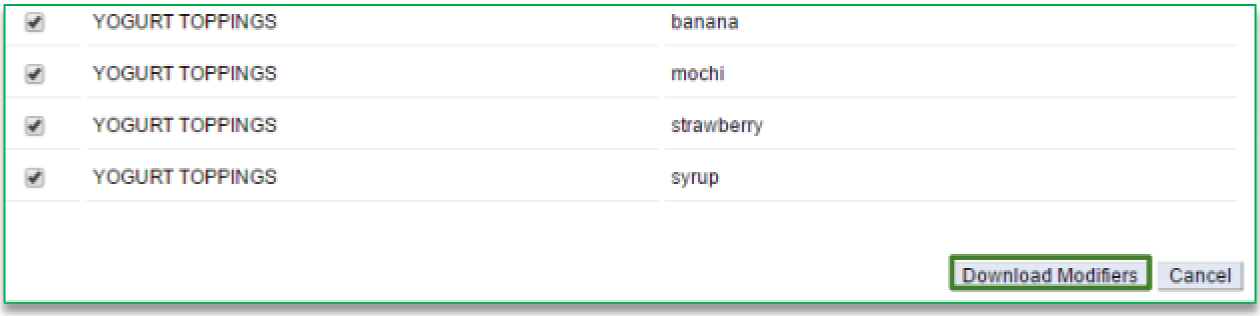
3. Click **Download Modifiers**



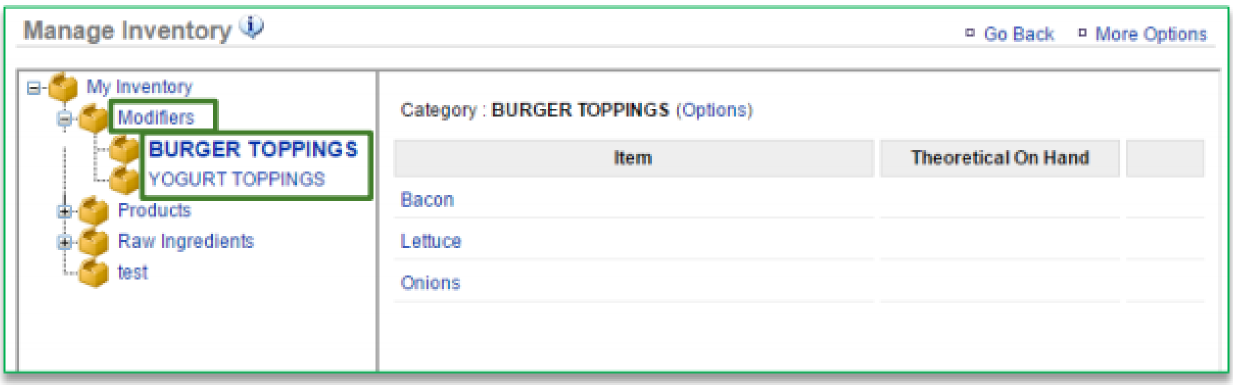
4. Those modifier items set up on your POS will appear on the screen
    a. You have the option to select those items you wish to import to inventory



5. Click **Download Modifiers**



6. Navigate back to the **Manage Inventory** platform
    a. The items you download will appear within a folder titled **Modifiers**



- **Click here to see the full details**

Recipe Creation

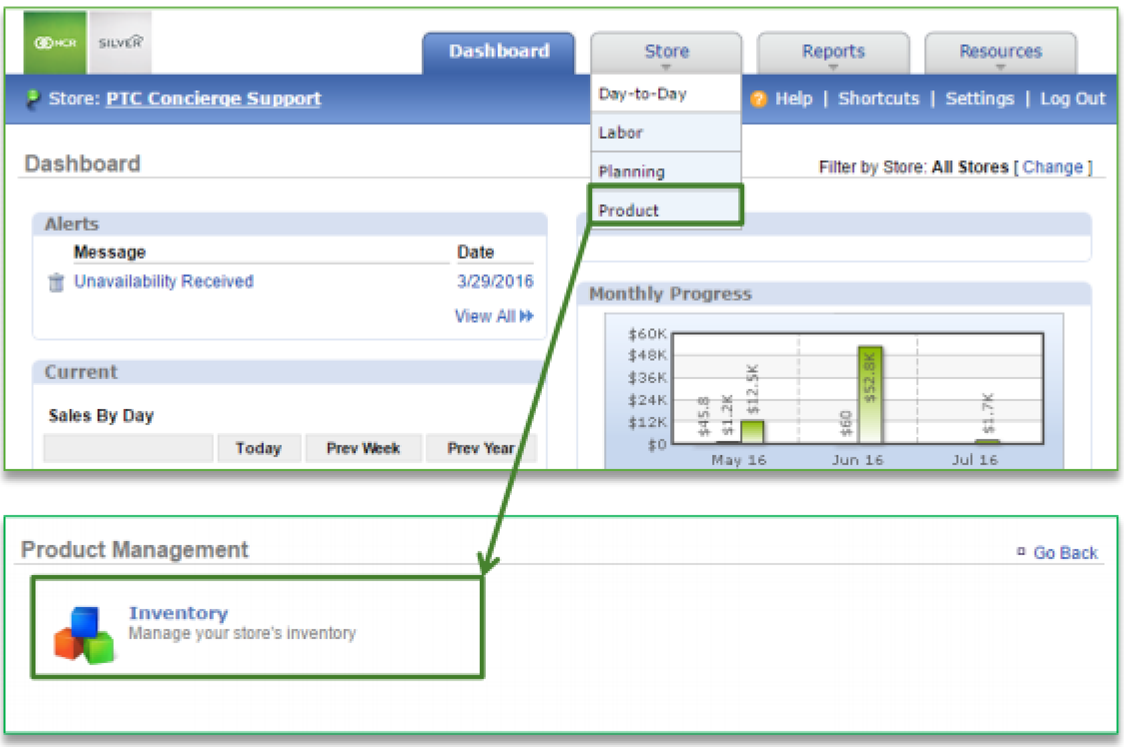
In this module, you will learn:

- How to create recipes from your list of raw ingredients within Console.

Recipe Creation

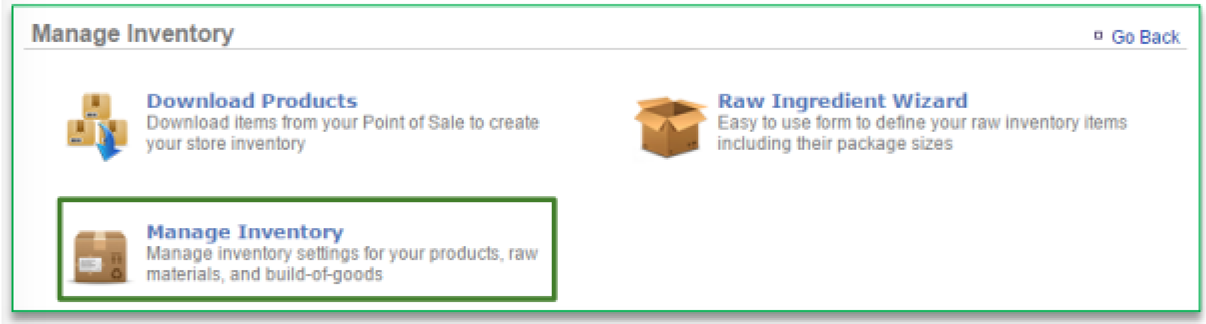
Keep in mind that if Console is supporting your brand with inventory management, this feature may not be accessible within your Console account.

To create recipes you will need to navigate to the **Product Management** module and click **Inventory**.

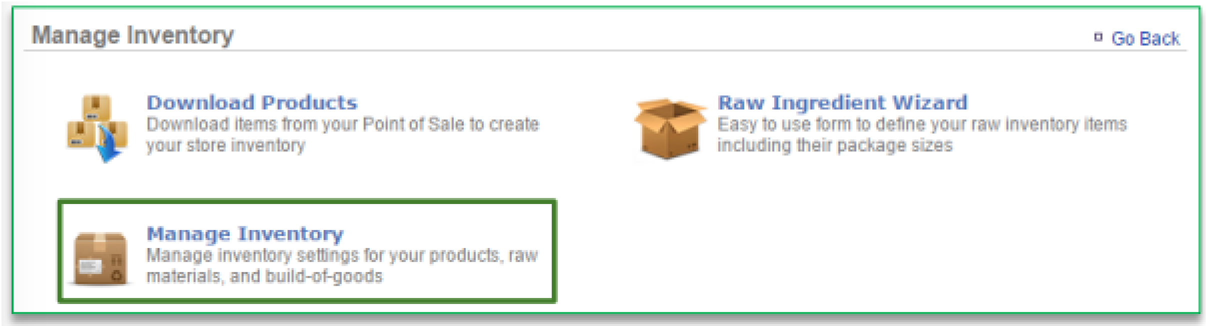


To Export Inventory

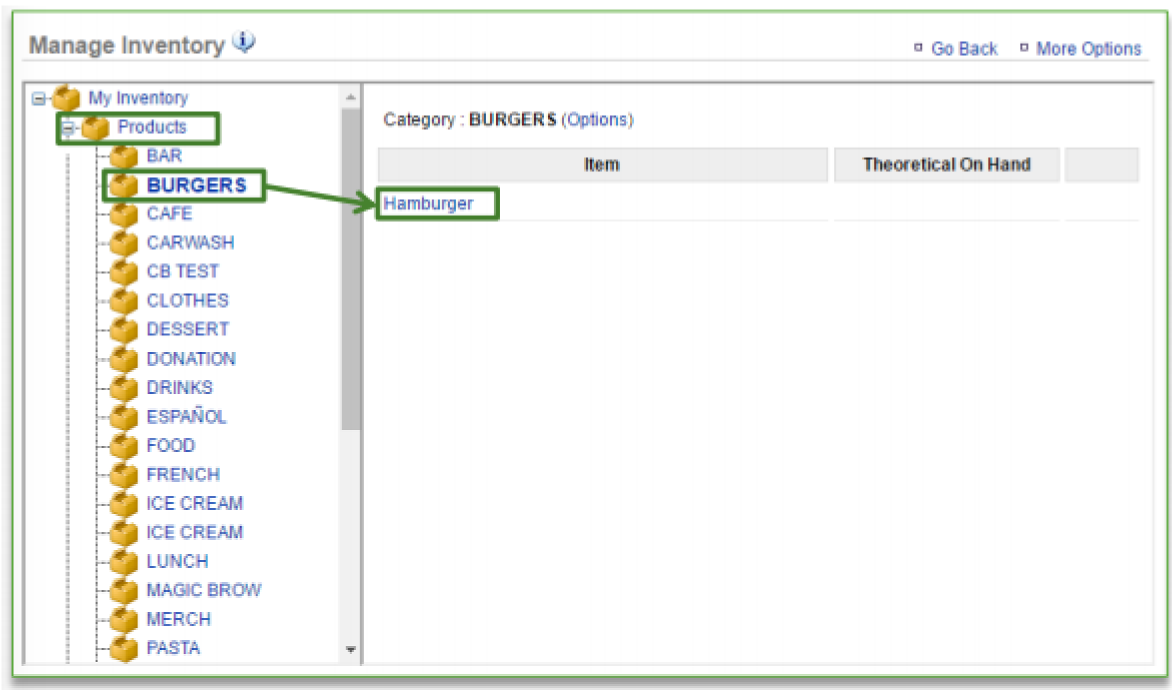
1. Click **Inventory Tools**



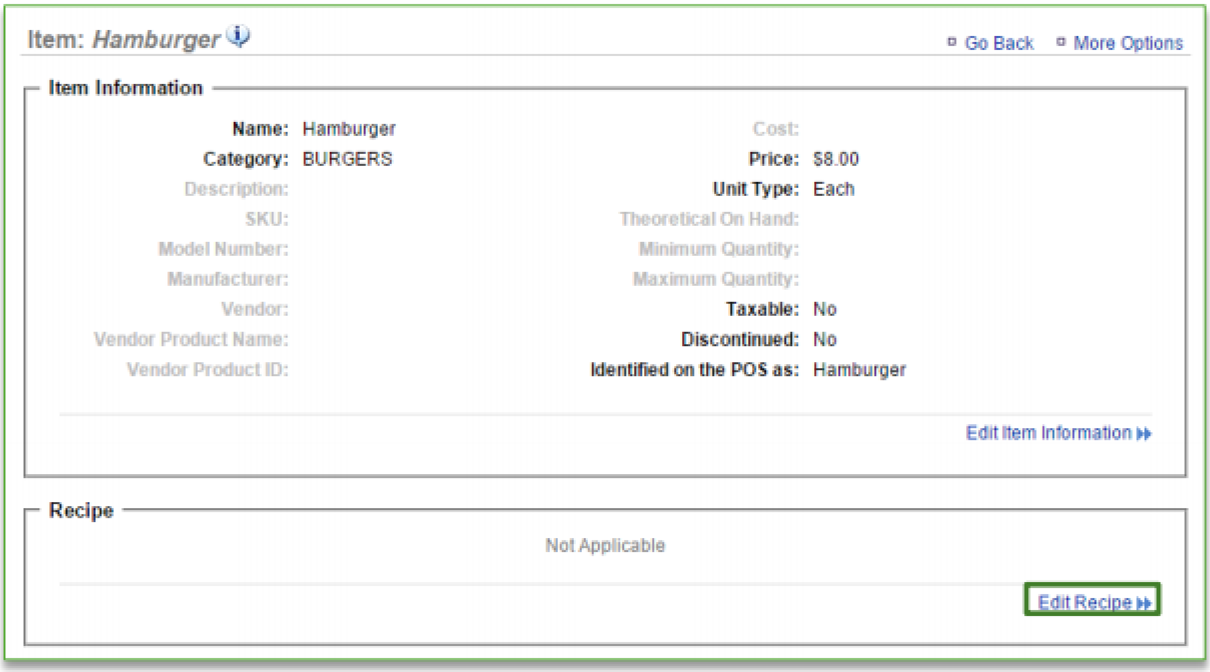
2. Click **Manage Inventory**



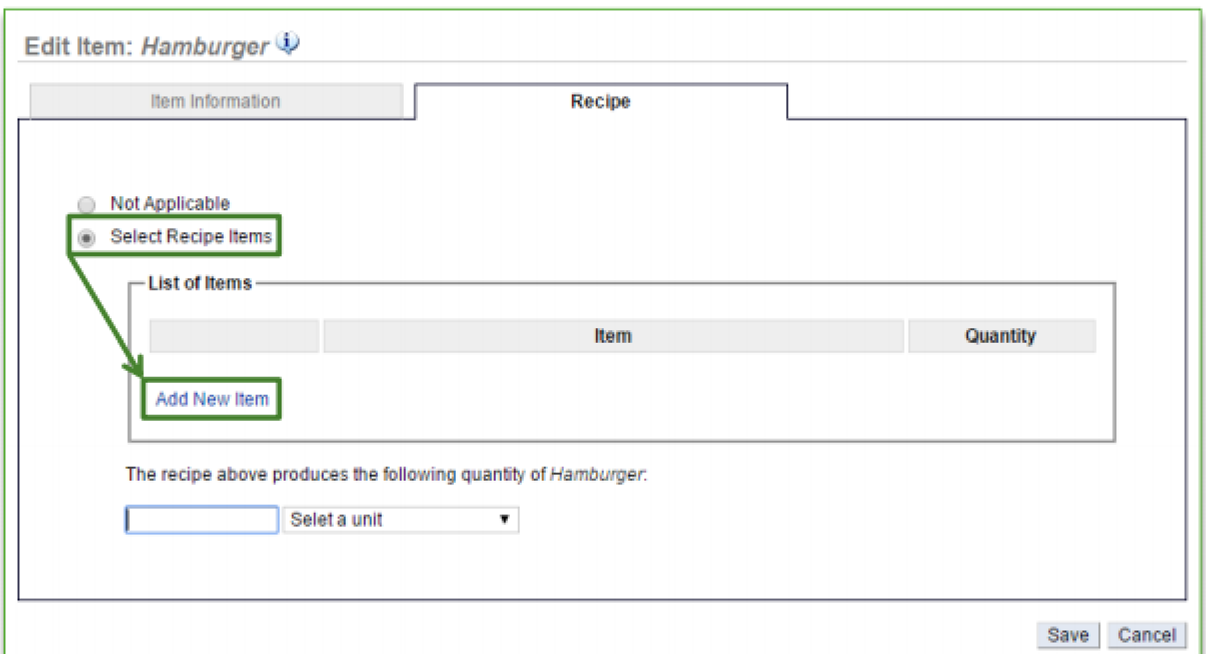
3. Click the **Products** (**or Modifiers**) folder to the left of the screen to expand the category
4. Click a subcategory
5. Click an item within the sub category



6. Click **Edit Recipe**

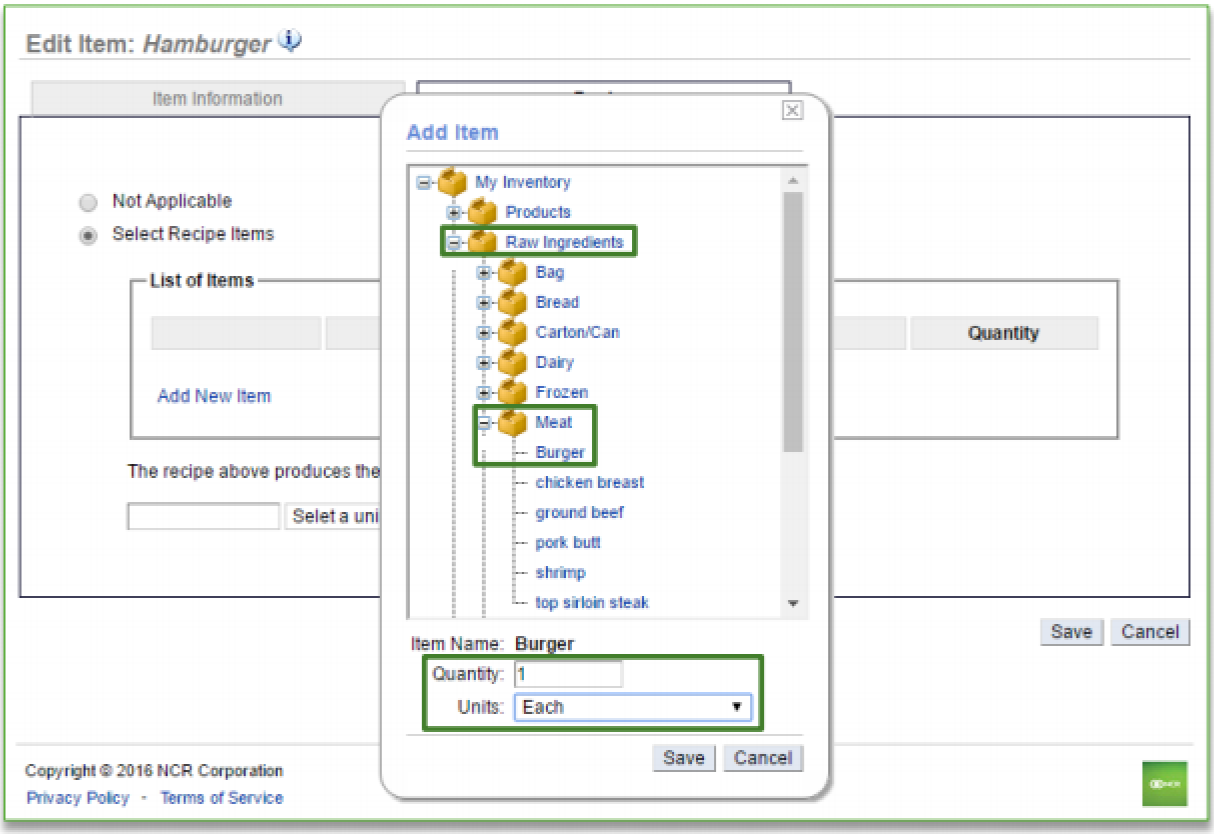


7. Click **Select Recipe Items**
8. Click **Add New Item**



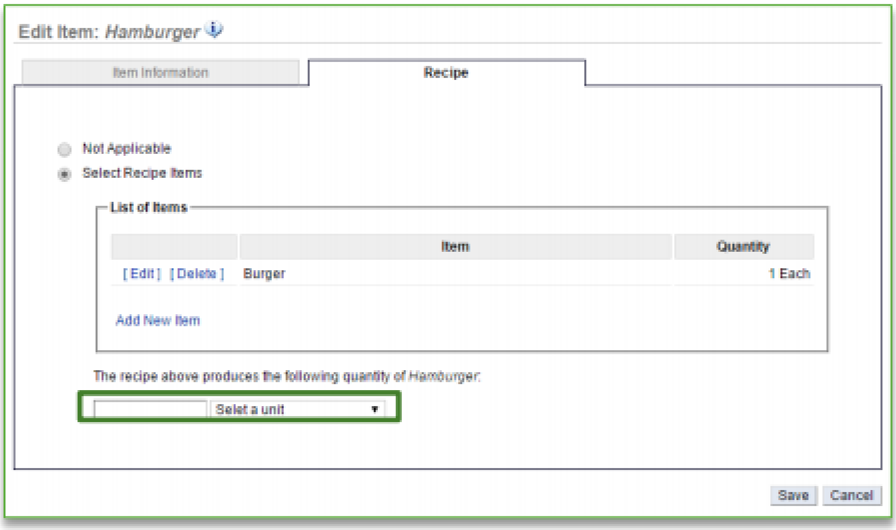
9. Click the **Raw Ingredients** folder to expand the selection
10. Select desired subcategory
11. Select applicable item within the subcategory

12. Enter quantity
13. Select Units
14. Click **Save**

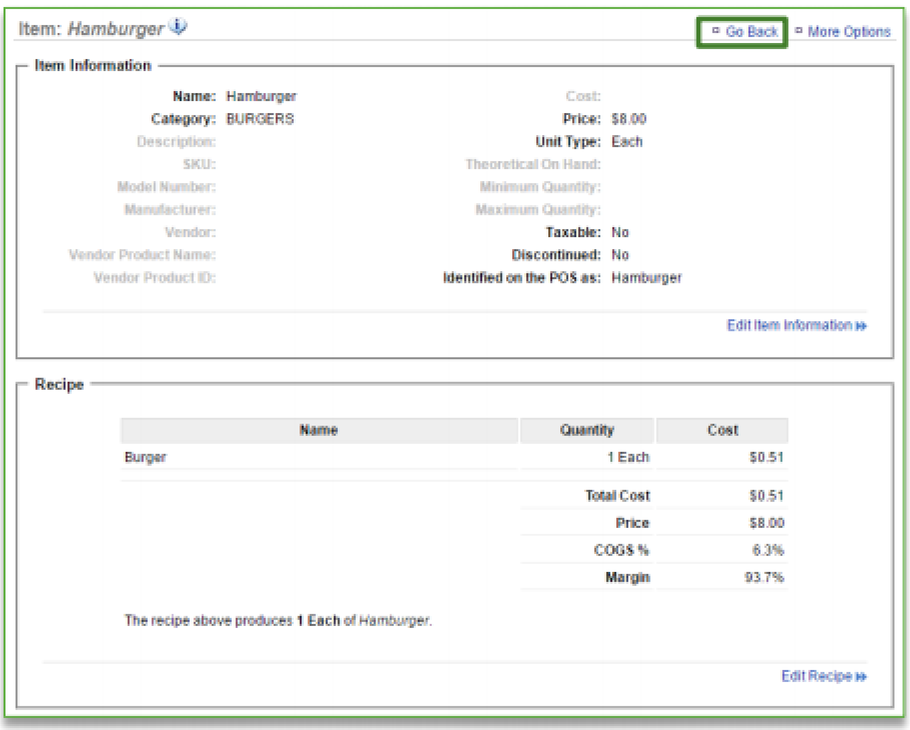


15. Each item will appear within the list of items for this recipe
    a. Continue adding items until you have completed your recipe
    b. Keep in mind that quantity and units will vary based off of how you receive the item
    c. It is important that the recipe usage compliments the unit of measure that the raw ingredient is set up with. For example:
        i. If you set up Burger Patties as a raw ingredient and they are delivered as a case of 100 patties, the recipe units should reference the number of patties used to create that recipe (e.g. 1 each)
        ii. If you set up a Ketchup as a raw ingredient and it is delivered as a 1 gallon container, the recipe units should reference the number of ounces used to create that recipe (e.g. 2 ounces)
16. Enter the quantity of the item that the recipe build yields. For example:
    a. For a hamburger, the total quantity for the recipe items shown yields 1 each (or 1 hamburger)

17. Click **Save**



18. You will be redirected to the Item Information screen which now reflects the cost of goods for that item. Click **Go Back** to navigate back to the Manage Inventory screen to continue building recipes



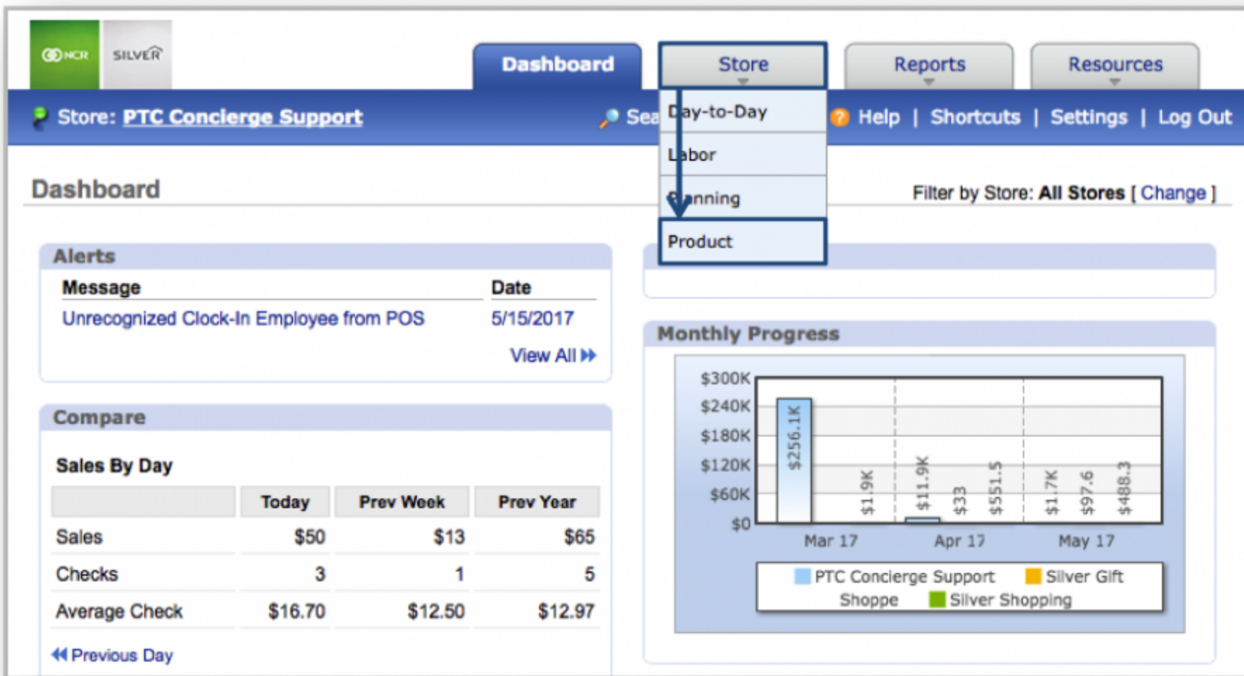
- **Click here to see the full details**

Export Inventory

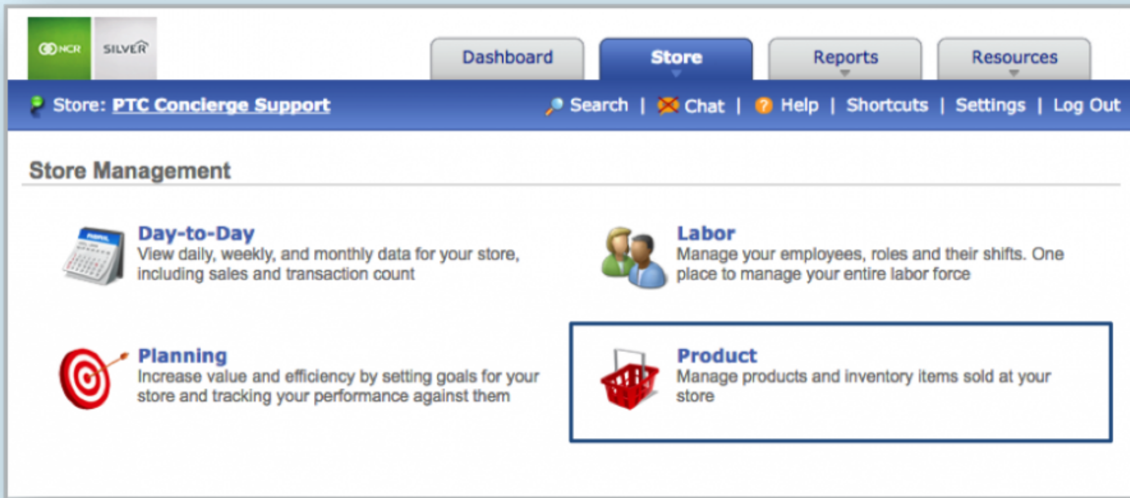
The purpose of this section is to illustrate how to export your inventory database.

Exporting Inventory

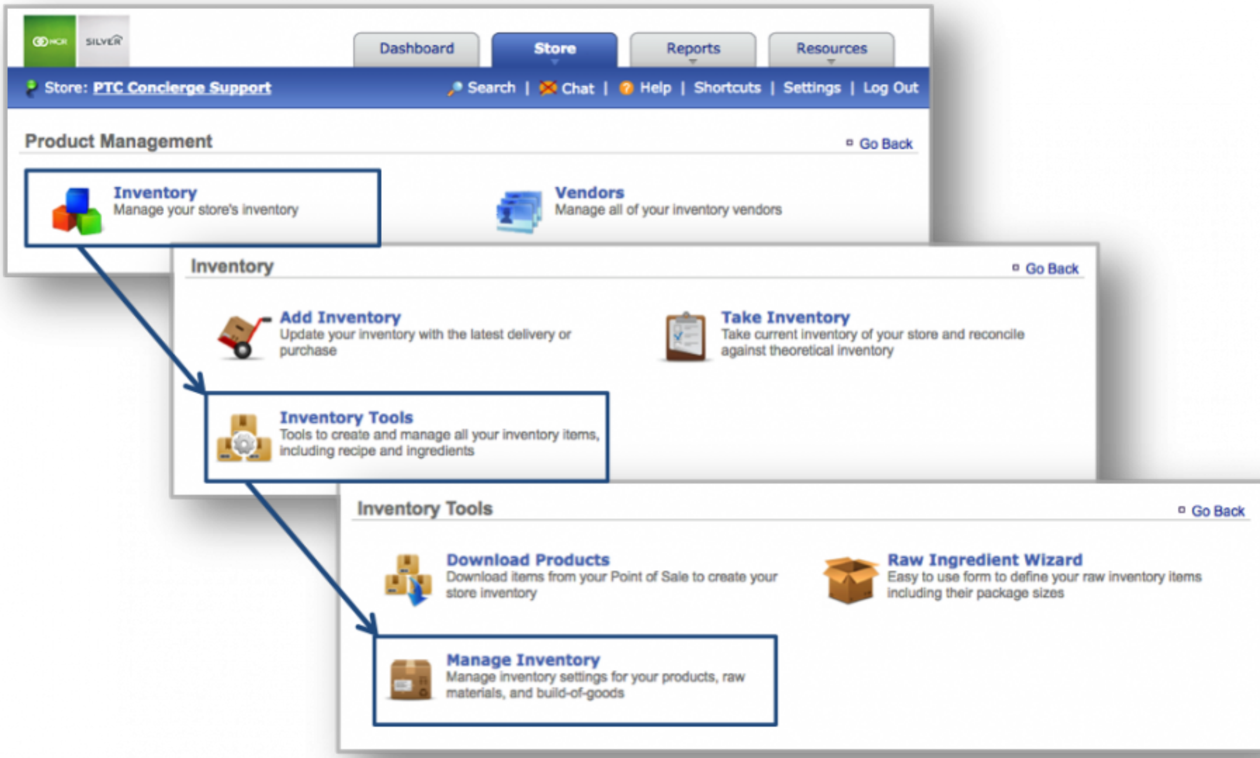
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Product***.



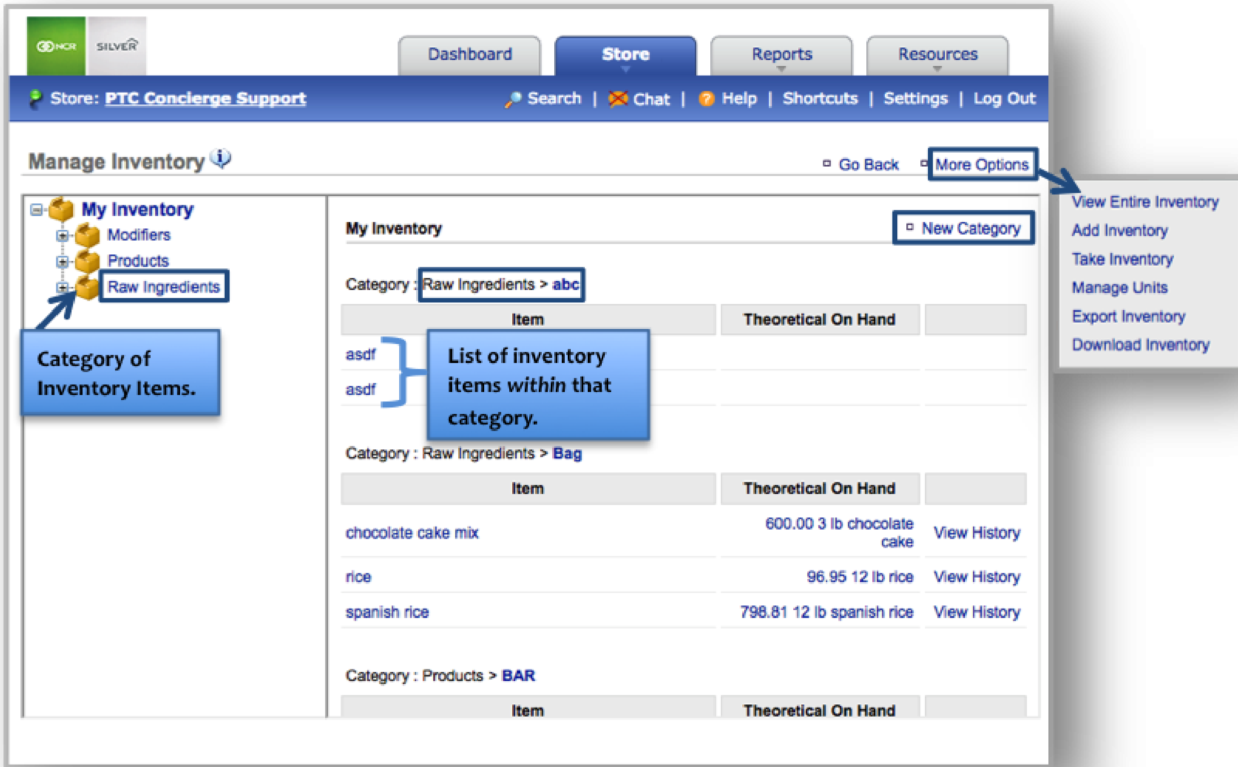
Hint: You can also access Inventory by clicking on the ***Store*** tab and then on ***Product*** from the Store Management screen.



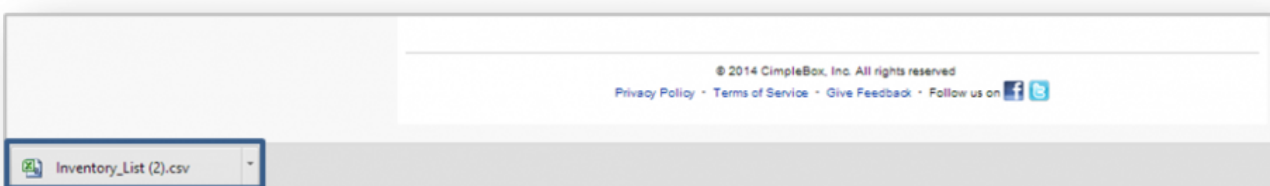
STEP 2: From the Product Management screen, click ***Inventory*** and then ***Manage Inventory***.



STEP 3: Click ***More Options*** at the top right corner and then ***Export Inventory***.



Your inventory database will automatically open in an excel file at the bottom of the screen.



Save the database to your computer.

Related Topics:

Add Inventory

Take Inventory

How to Hide or Display Items

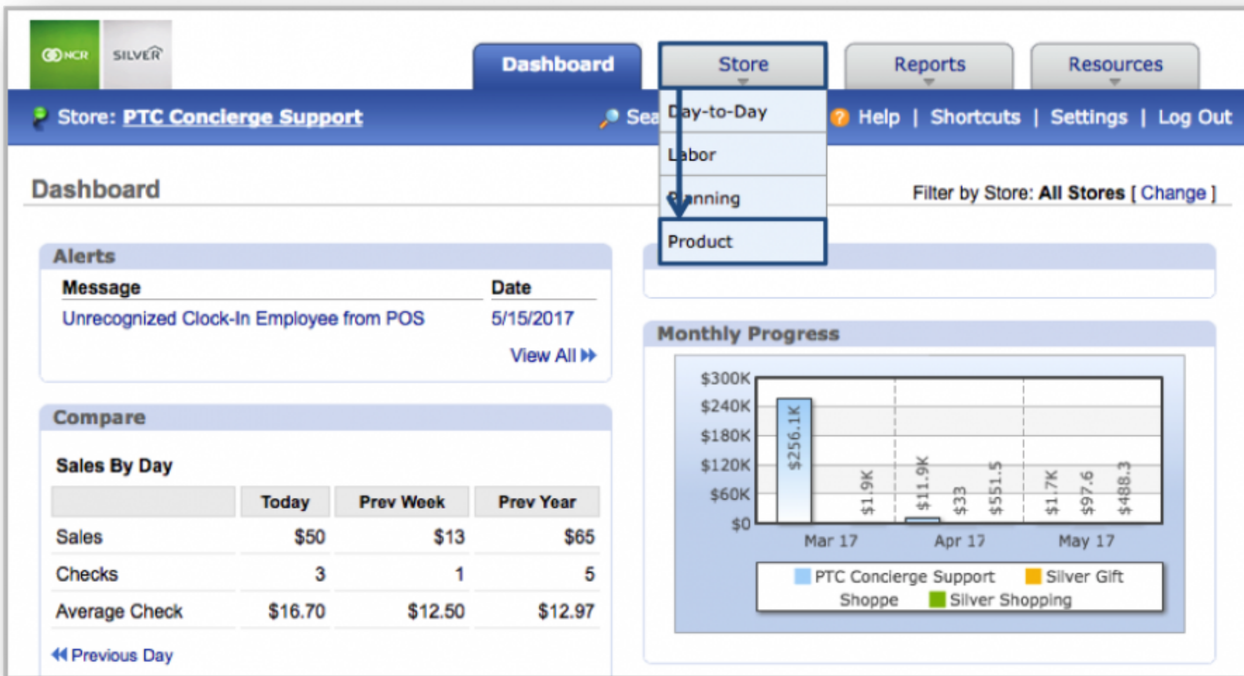
[Manage Inventory](#)
[How to Add a Custom a Unit of Measure](#)

Custom Unit of Measure

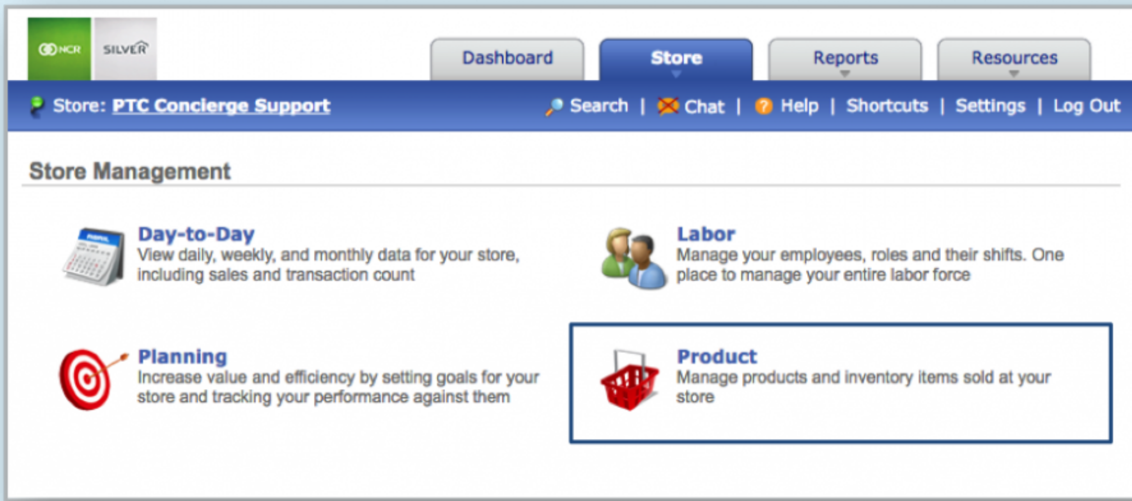
The purpose of this section is to illustrate how to add a custom unit of measure to your inventory.

Adding a Custom Unit of Measure

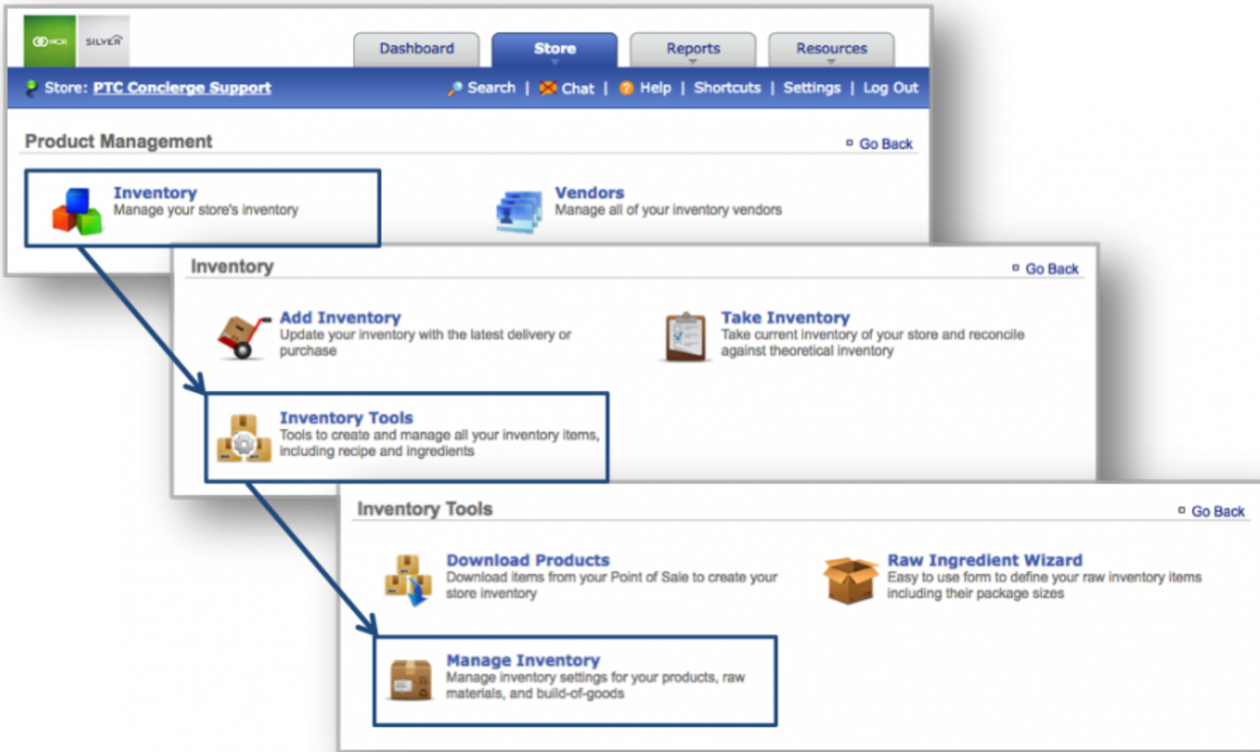
STEP 1: From your Dashboard view, mouse over the ***Store*** tab and click ***Product***.



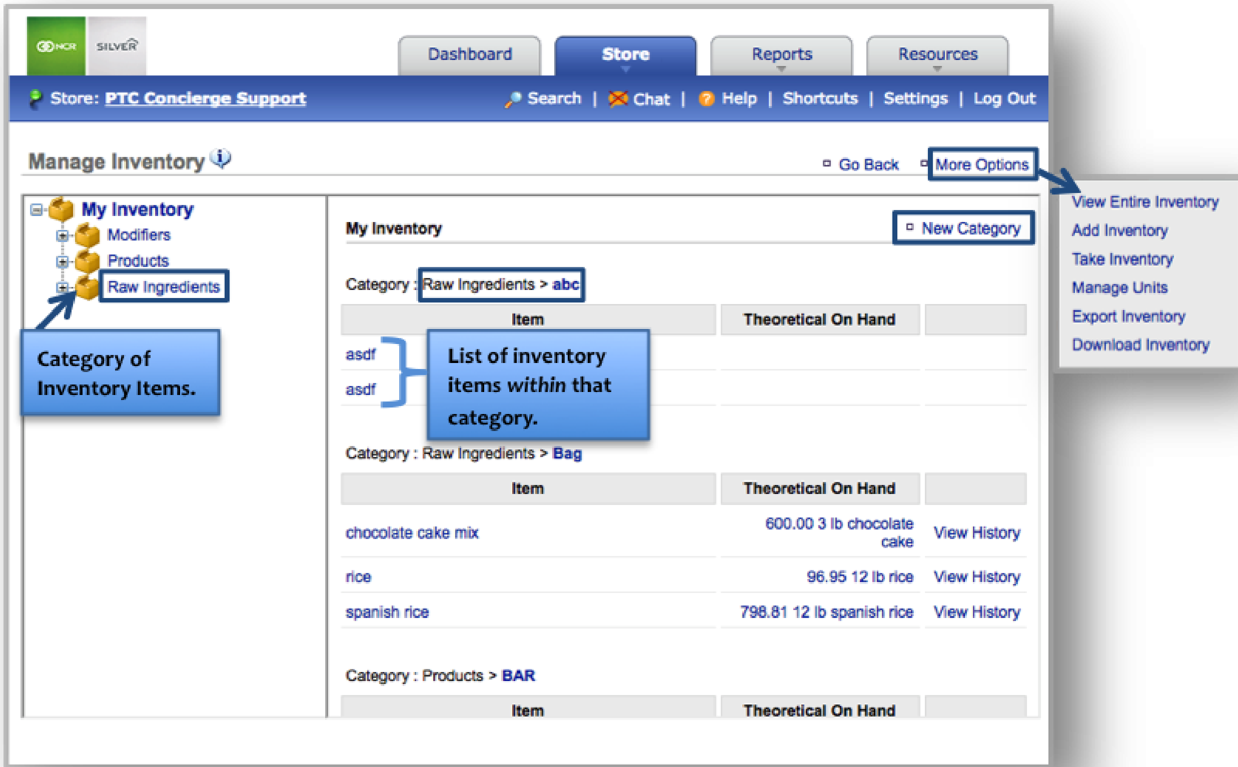
✻ ***Hint:*** You can also access Inventory by clicking on the ***Store*** tab and then on ***Product*** from the Store Management screen.



STEP 2: From the Product Management screen, click ***Inventory*** and then ***Manage Inventory***.



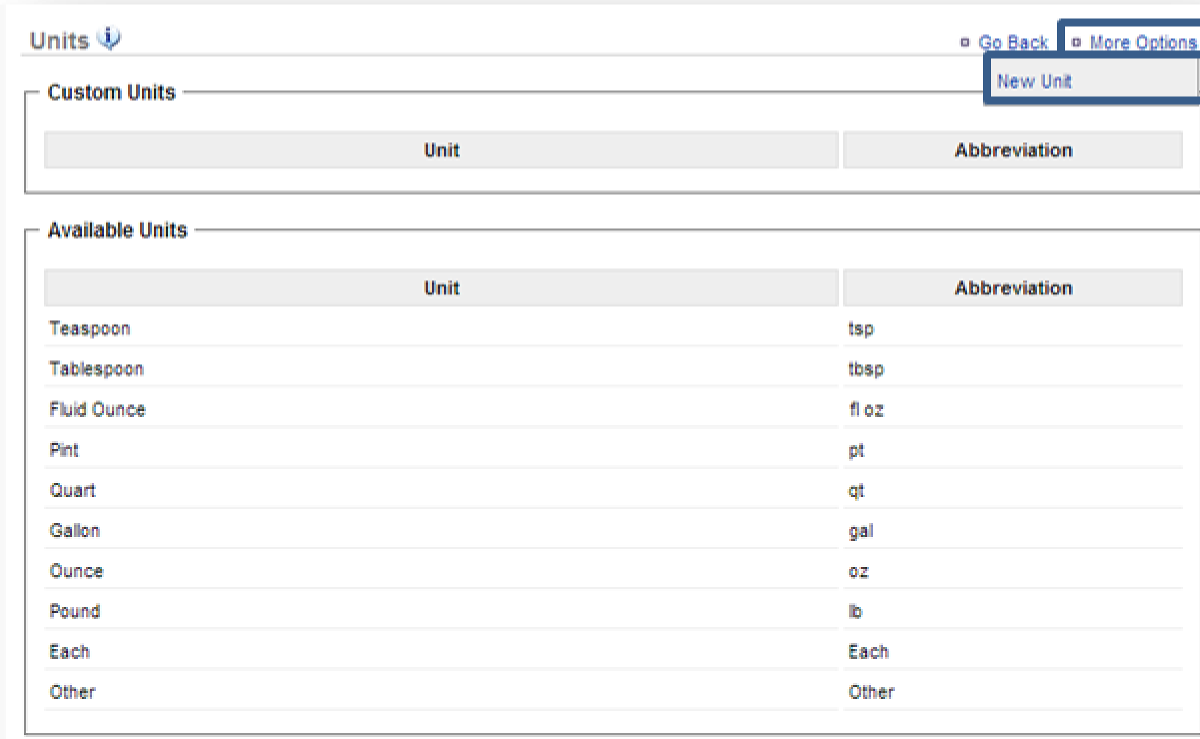
INVENTORY MANAGEMENT SCREEN



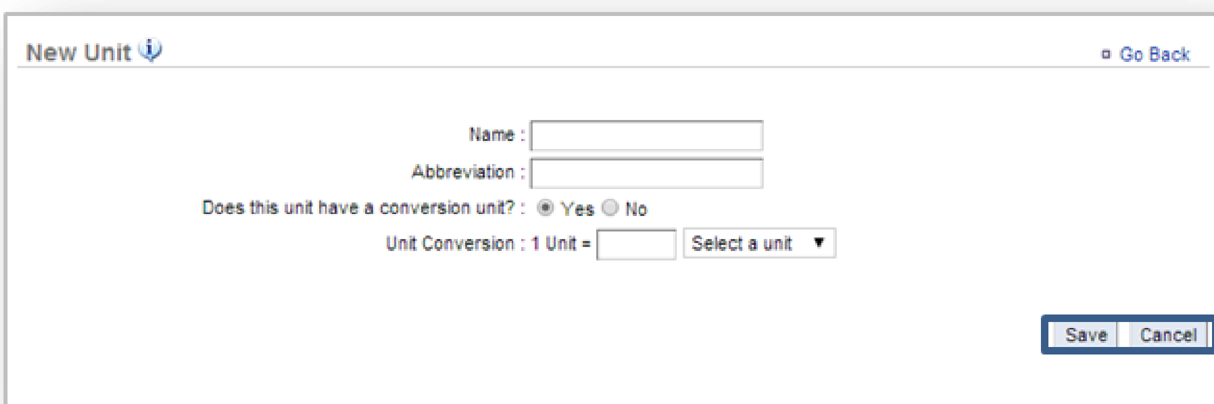
Add a Custom Unit

STEP 1: From the Manage Inventory screen, click ***More Options*** and then ***Manage Units***.

STEP 2: Click ***More Options*** at the top right and then ***New Unit***.



STEP 3: Enter the unit information and click ***Save*** when done.



✻ **Hint:** You can choose a unit of measure for any item by selecting that item from the *Manage Inventory* screen and click ***Edit Item Information***.

Related Topics:

Add Inventory

Take Inventory

How to Hide or Display Items

Manage Inventory

How to Export Inventory: How to export your inventory database.

Set Par Levels

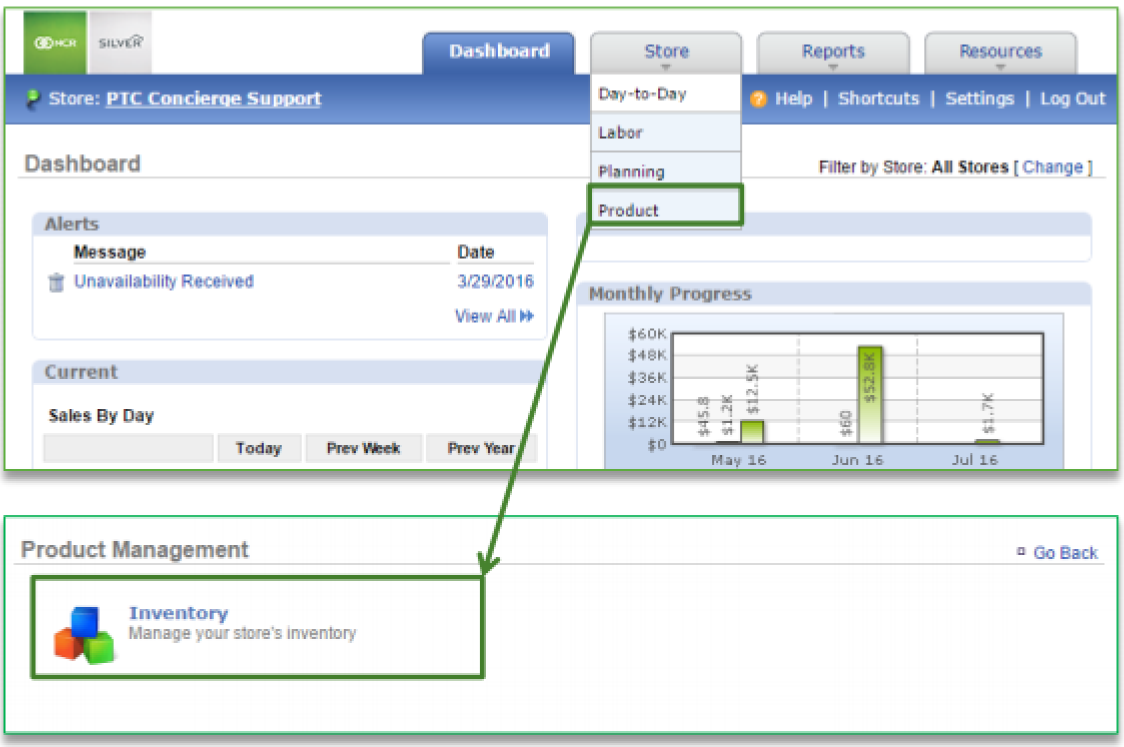
In this module, you will learn:

- How to set par levels from your inventory items within Console

Setting Par Levels

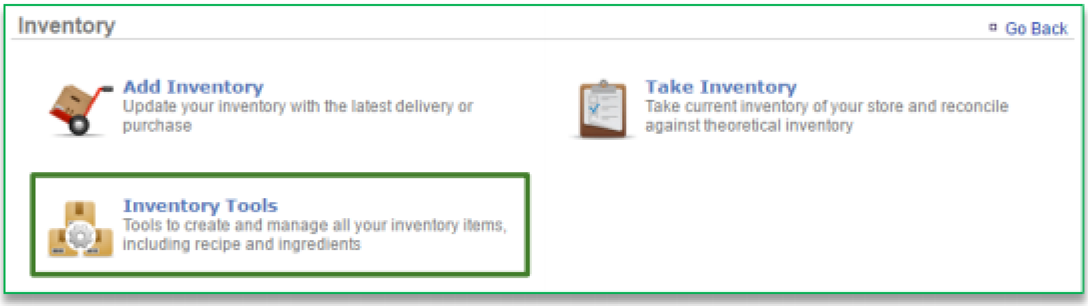
You must have access to the Manage Inventory module within Console in order to set part levels for inventory items.

To set par levels you will need to navigate to the **Product Management** module and click **Inventory**.

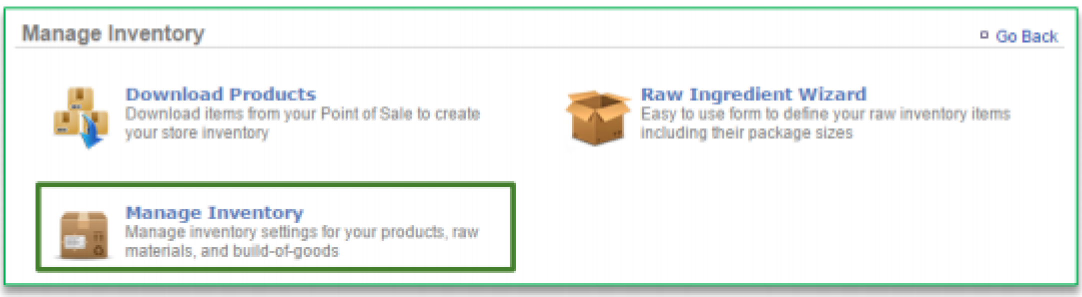


To Set Par Levels

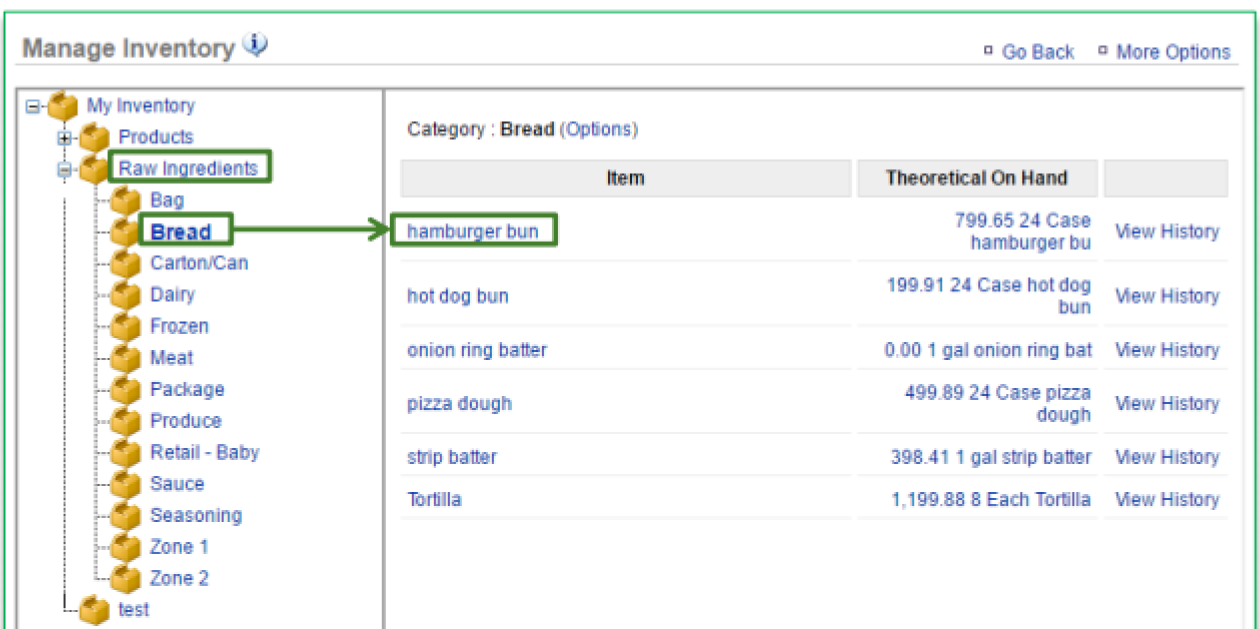
1. Click **Inventory Tools**



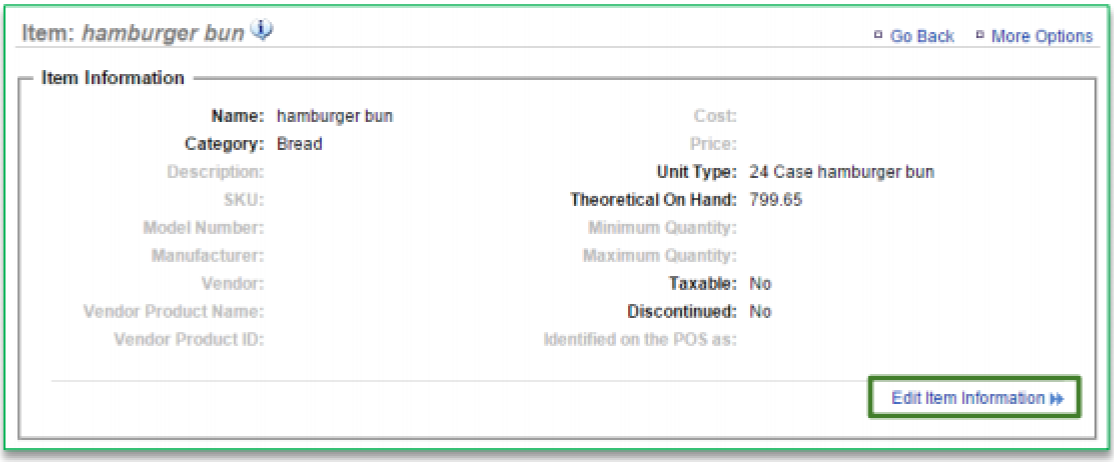
2. Click **Manage Inventory**



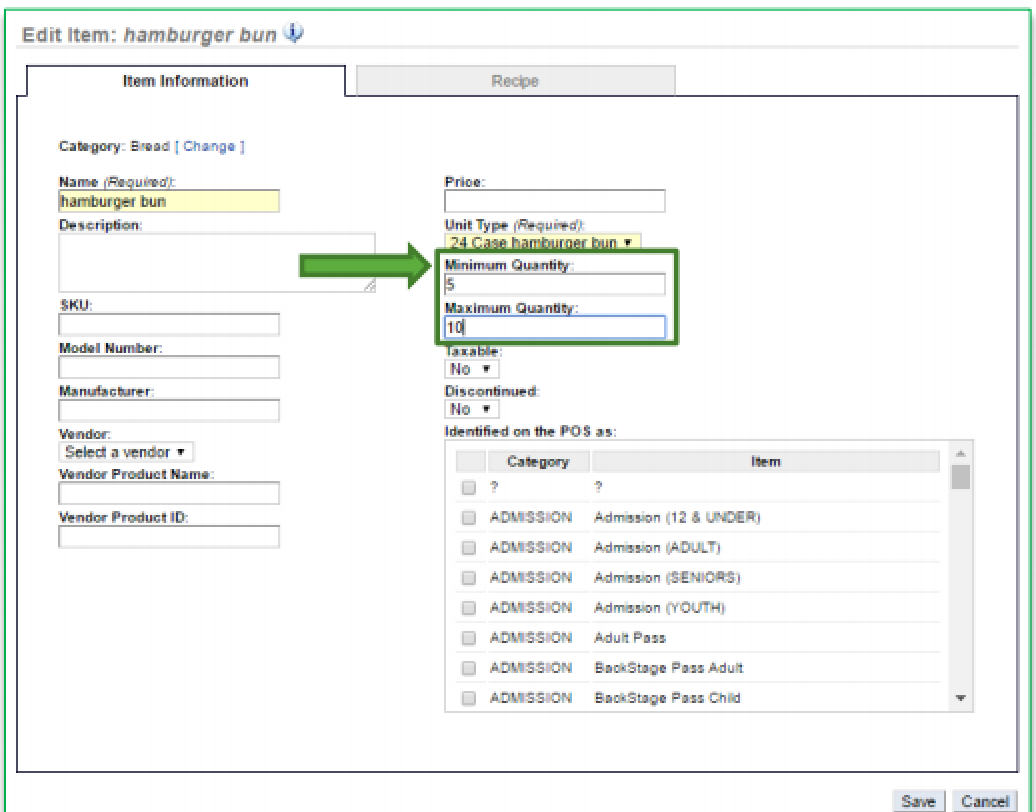
3. Click the **Raw Ingredients** folder to the left of the screen to expand the category
4. Click a subcategory
5. Click an item within the subcategory



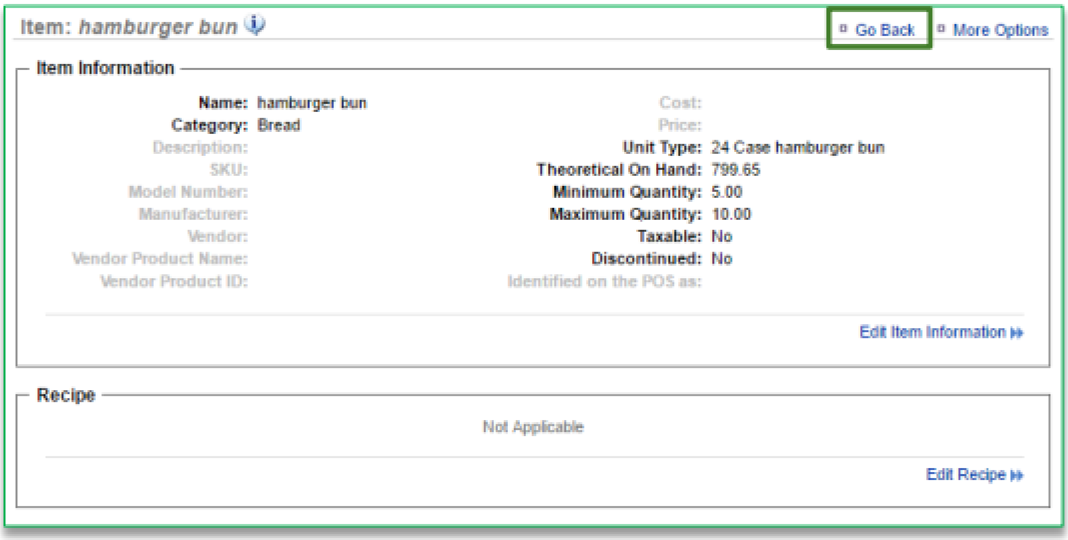
6. Click **Edit Item Information**



7. Enter **Minimum Quantity**
    a. Quantity is based off the default unit type that is selected
8. Enter **Maximum Quantity**
    a. Quantity is based off the default unit type that is selected
9. Click **Save**



10. You will be redirected to the **Item Information** screen. Click **Go Back** to go back to the **Inventory Management** screen



11. Repeat this process for all items you want to apply par levels to

    - Set par levels will be visible within the following Console features:
        - Add Inventory
        - Take Inventory
        - Inventory on Hand Report
        - Par Level Report

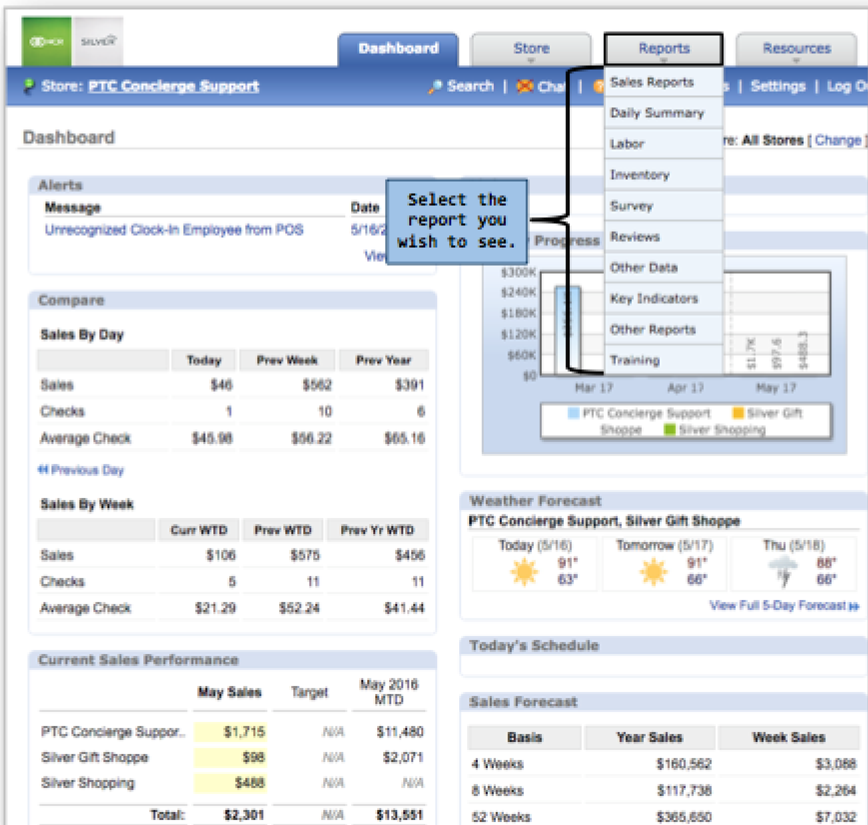
- **Click here to see the full details**

Reports

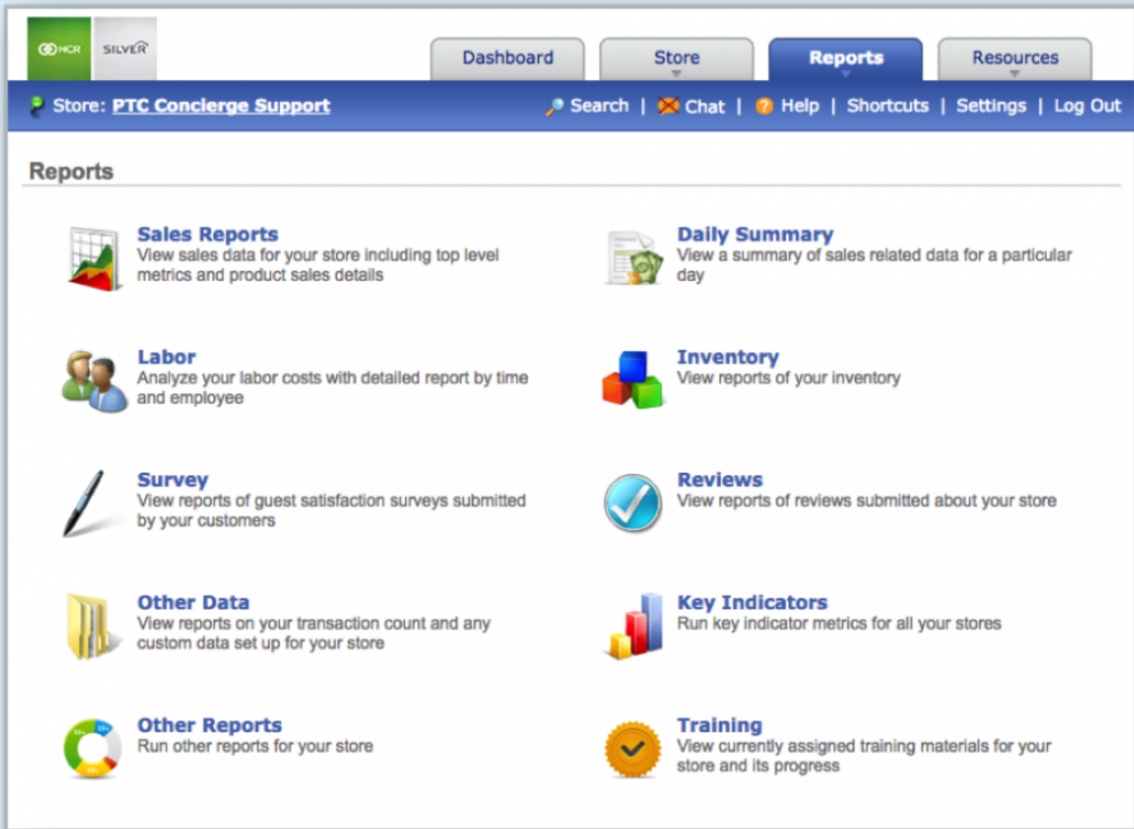
This section illustrates how to navigate to, and generate, reports. ***Please note that based on your brand's chosen solution, you may notice additional reports in the images throughout this section that may not be visible on your platform.***

Navigating to Reports

From your Dashboard view, mouse over the ***Reports*** tab and click on the report you wish to see.

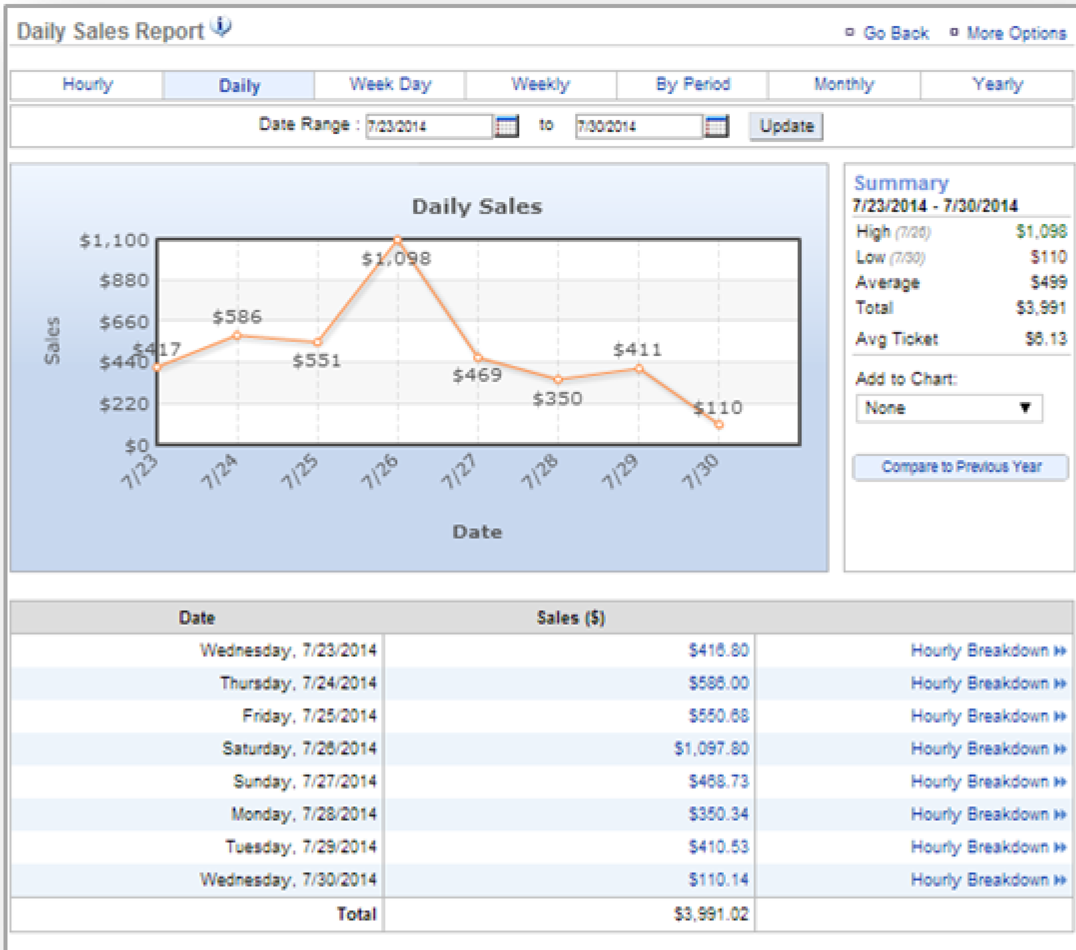


✻ ***Hint:*** You can also access Reports by clicking on the ***Reports*** tab and then on the report you wish to see.



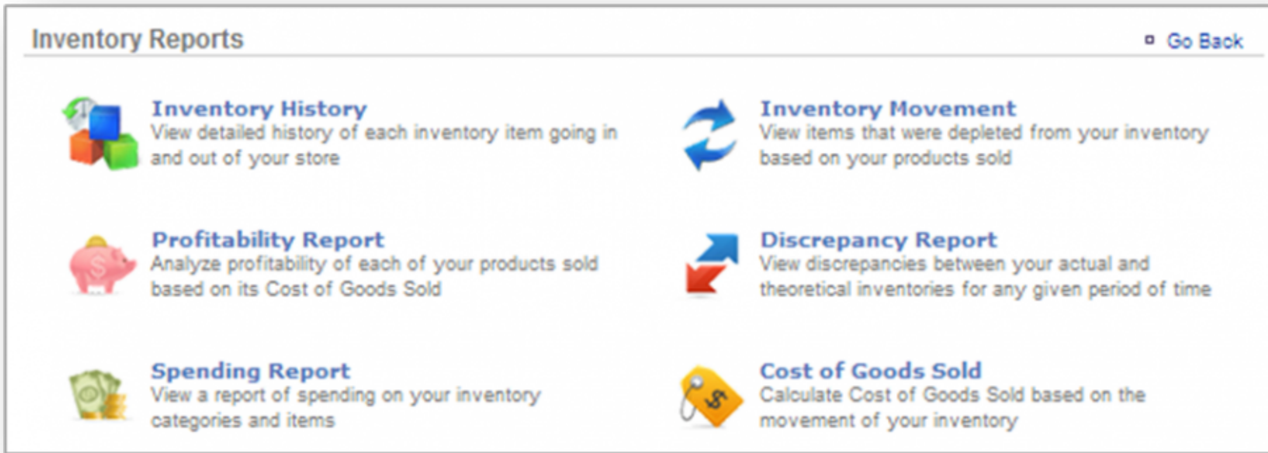
KEY REPORTS (*Click on a report category to view more detailed information.*)

Sales: View sales over any time period.

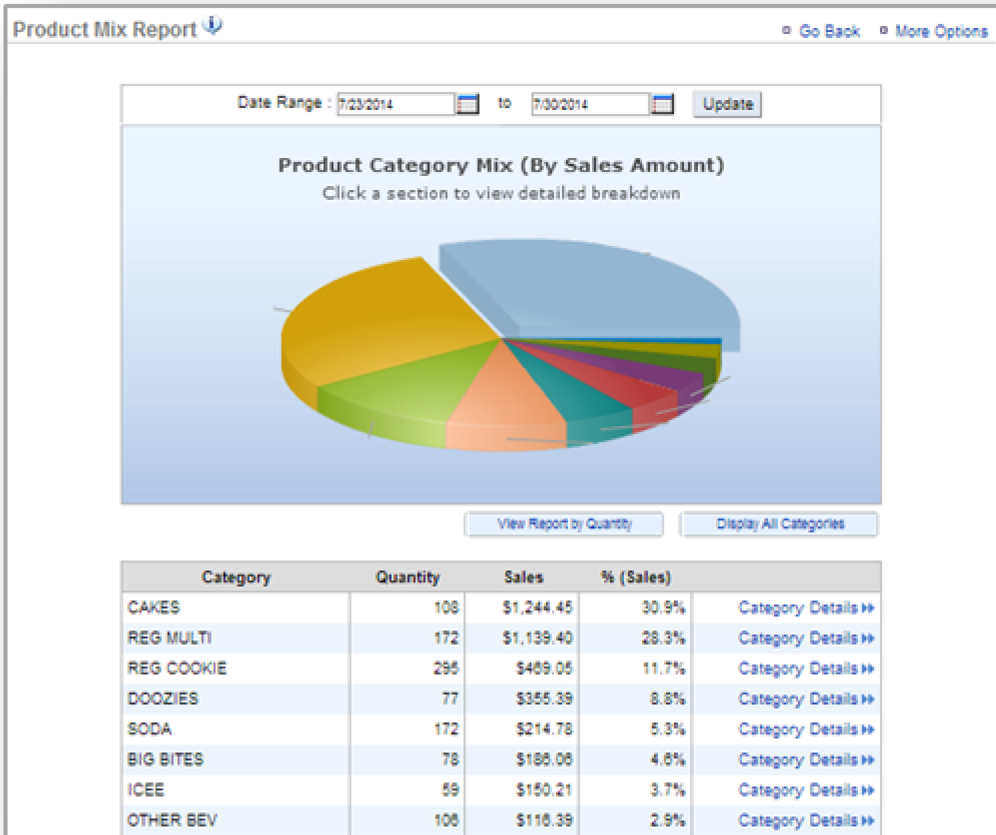


Date	Sales ($)	
Wednesday, 7/23/2014	$416.80	Hourly Breakdown
Thursday, 7/24/2014	$586.00	Hourly Breakdown
Friday, 7/25/2014	$550.68	Hourly Breakdown
Saturday, 7/26/2014	$1,097.80	Hourly Breakdown
Sunday, 7/27/2014	$468.73	Hourly Breakdown
Monday, 7/28/2014	$350.34	Hourly Breakdown
Tuesday, 7/29/2014	$410.53	Hourly Breakdown
Wednesday, 7/30/2014	$110.14	Hourly Breakdown
Total	$3,991.02	

Inventory: View of inventory history, inventory movement, profitability, discrepancies, spending and cost of goods sold.

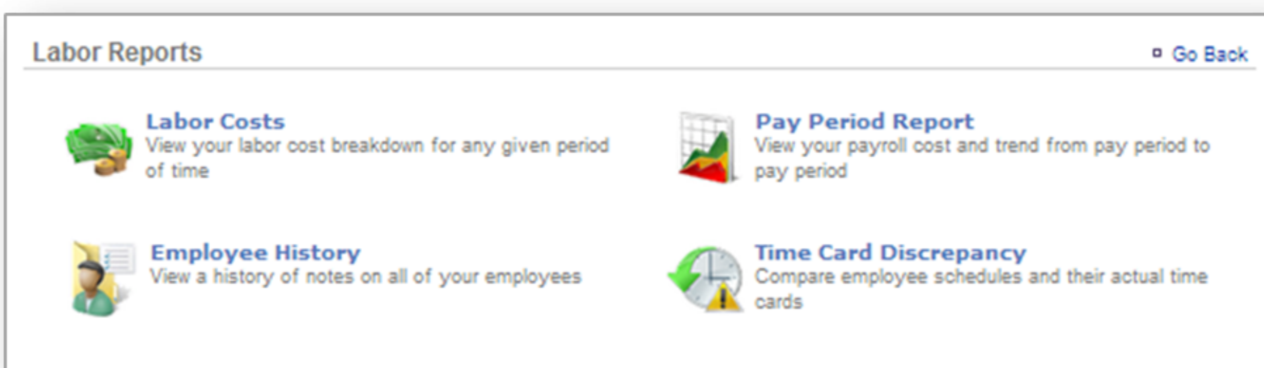


Product Mix: View breakdown of your products by category or department sold over any given period of time.



Category	Quantity	Sales	% (Sales)	
CAKES	108	$1,244.45	30.9%	Category Details
REG MULTI	172	$1,139.40	28.3%	Category Details
REG COOKIE	295	$469.05	11.7%	Category Details
DOOZIES	77	$355.39	8.8%	Category Details
SODA	172	$214.78	5.3%	Category Details
BIG BITES	78	$186.06	4.6%	Category Details
ICEE	59	$150.21	3.7%	Category Details
OTHER BEV	106	$116.39	2.9%	Category Details

Labor: View labor costs, pay periods, employee history and time card discrepancies.

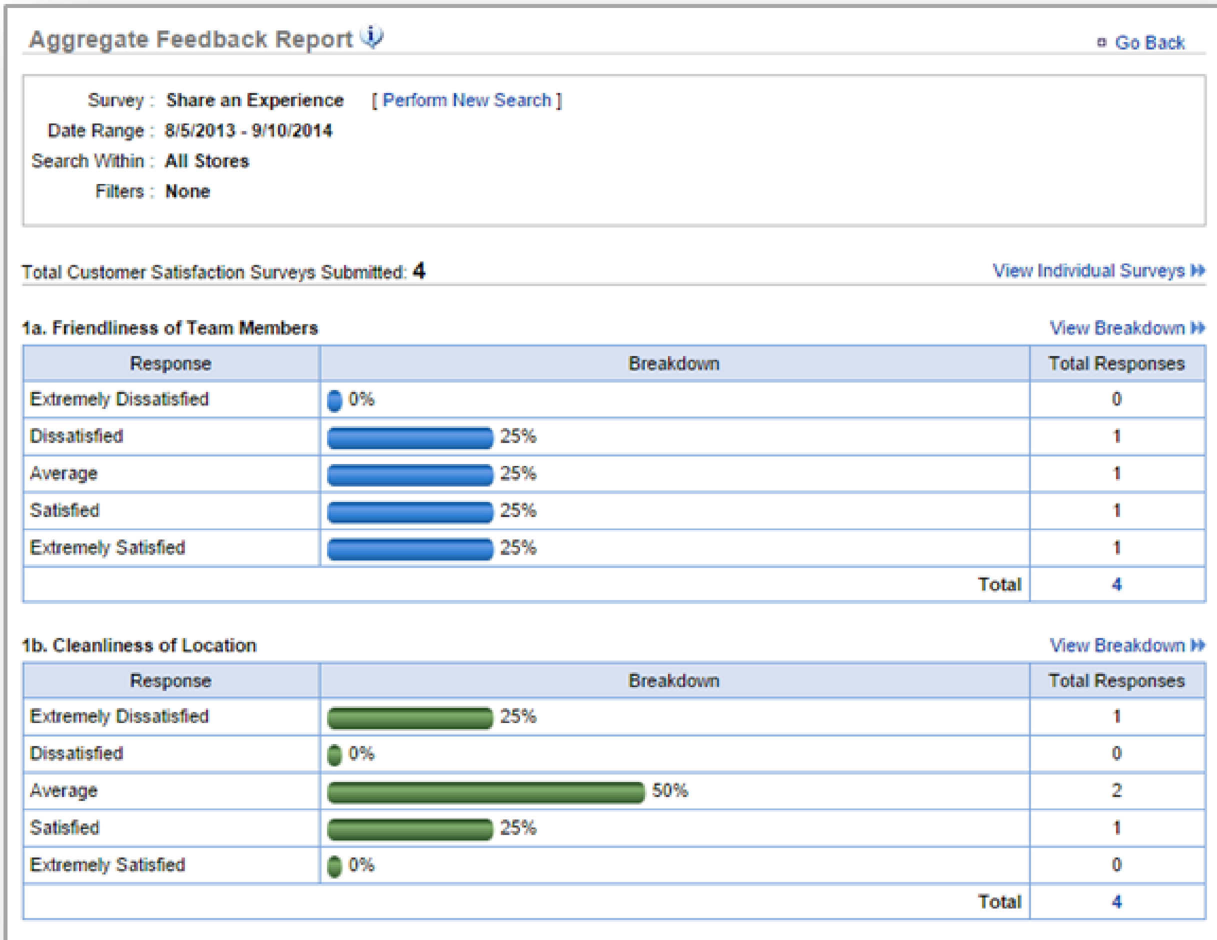


Training: View currently assigned training materials for your store and team member progress.

Training
Go Back

Class	Assigned	Completed	Percent
Recipe Creation			
Spoonable Smoothie	6	0	0.0%
Lemonade Yogurt, Lemonade Chillers & Coffee Chillers Certification Test	5	0	0.0%
Frozen Coffee Chiller Creation	6	0	0.0%
Frozen Lemonade Chiller Creation	3	0	0.0%
Caramel Apple Pie Dream Shake	5	0	0.0%
Artisan Hot Chocolate Certification Test	3	0	0.0%
Smoothie Certification Test	6	1	16.7%
Training Module Videos > Taylor Machine Operations Module			
Assembling the Taylor Machine	6	0	0.0%
Sanitizing the Taylor Machine	6	0	0.0%
Priming the Taylor Machine	6	0	0.0%
Disassembling the Taylor Machine	6	0	0.0%
Taylor Brush Cleaning	6	0	0.0%
Certification Test	6	0	0.0%

Survey: View reports for guest satisfaction surveys submitted by your customers. Surveys are not limited to guest satisfaction and can pertain to an array of categories that yield some type of feedback. Surveys are customized to your brand's specifications.



Aggregate Feedback Report

Go Back

Survey : Share an Experience [Perform New Search]
Date Range : 8/5/2013 - 9/10/2014
Search Within : All Stores
Filters : None

Total Customer Satisfaction Surveys Submitted: 4 View Individual Surveys

1a. Friendliness of Team Members View Breakdown

Response	Breakdown	Total Responses
Extremely Dissatisfied	0%	0
Dissatisfied	25%	1
Average	25%	1
Satisfied	25%	1
Extremely Satisfied	25%	1
	Total	4

1b. Cleanliness of Location View Breakdown

Response	Breakdown	Total Responses
Extremely Dissatisfied	25%	1
Dissatisfied	0%	0
Average	50%	2
Satisfied	25%	1
Extremely Satisfied	0%	0
	Total	4

Did you know? You can export any report by clicking on the ***More Options*** link of the report that you are viewing.

Related Topics

[Sales Reports]

[Inventory Reports]

[Product Mix Reports]

[Labor Reports]

[Training Reports]

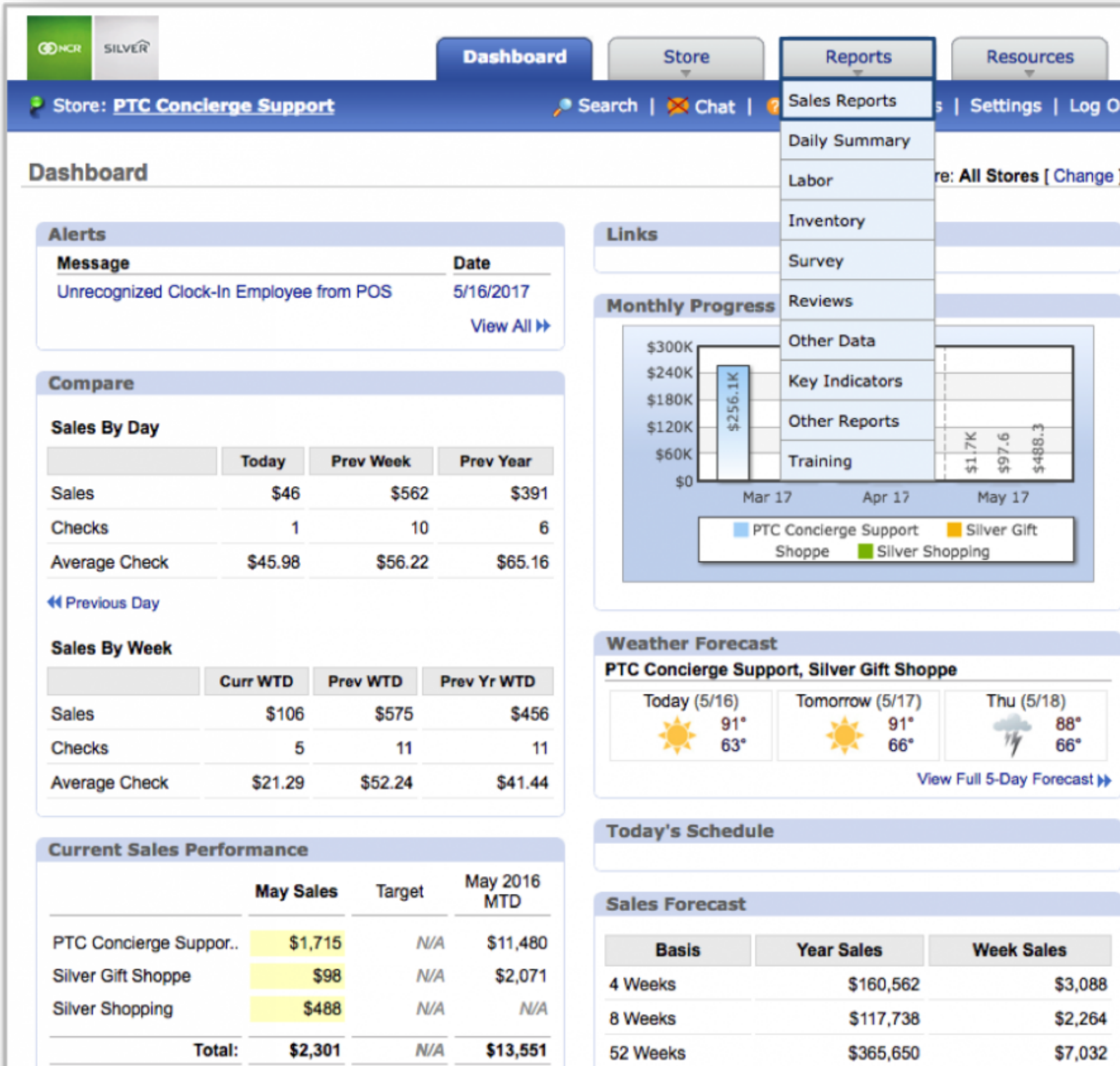
[Survey Reports]

Sales Reports

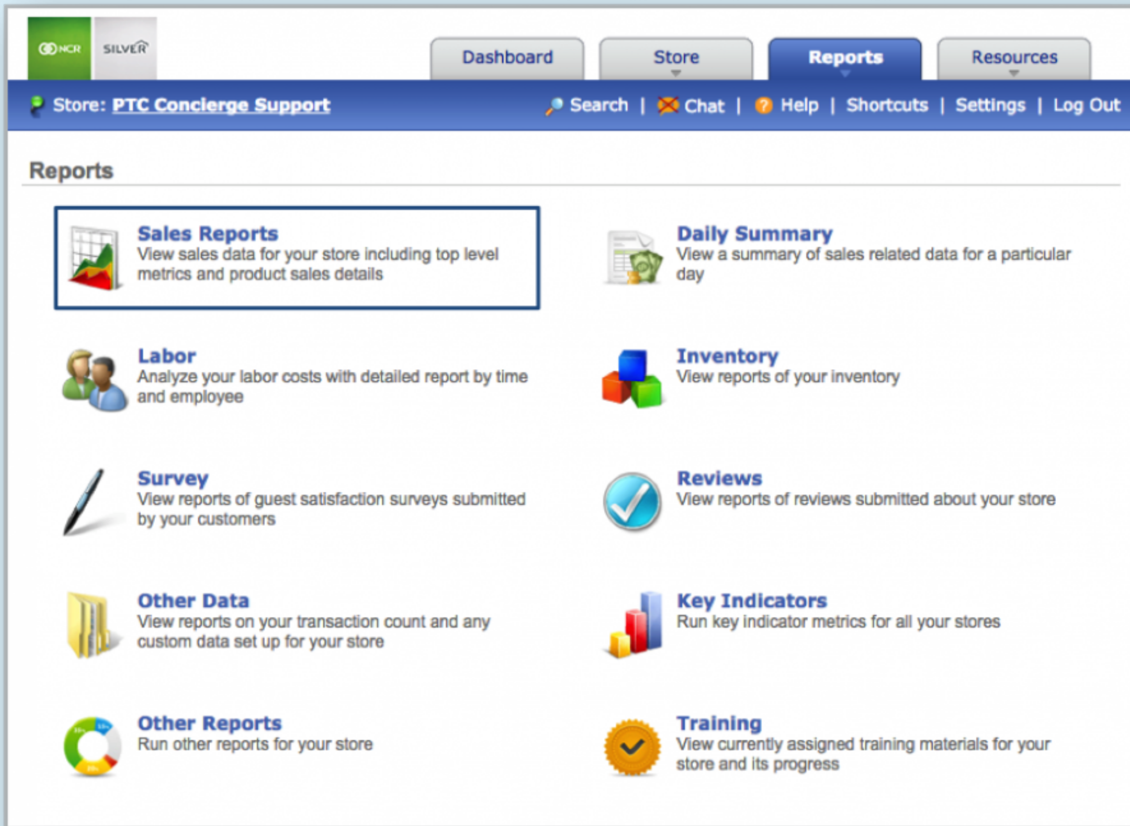
The purpose of this section is to illustrate how to generate a sales report. This section will also focus more specifically on the *Daily Sales Report*. For more detailed information on Hourly, Week Day, Weekly, By Period, Monthly and Yearly reports, click here.

Generate a Sales Report

From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



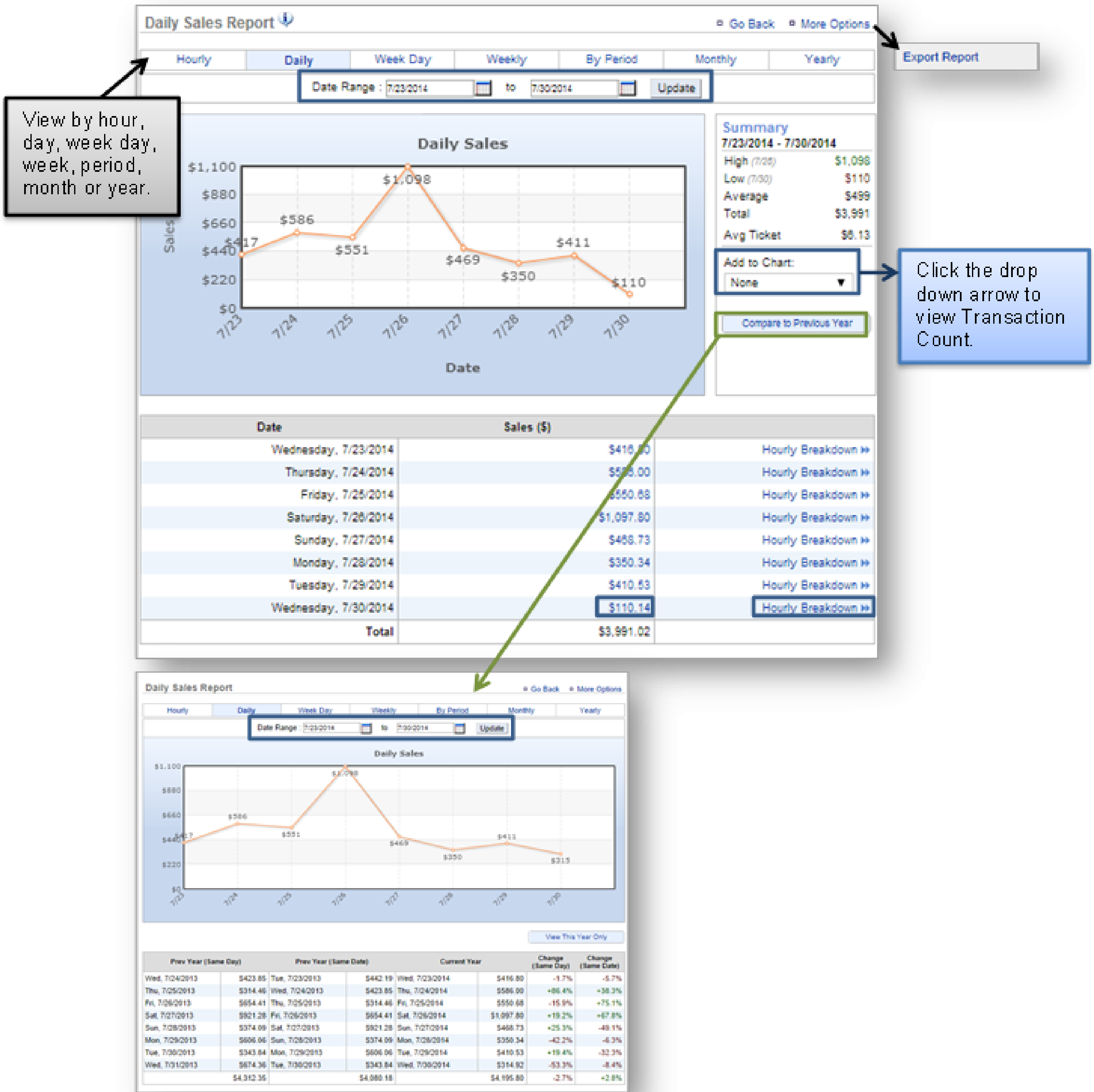
Hint: You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.



The ***Daily Sales Report*** will automatically appear on screen. From here you will be able to:

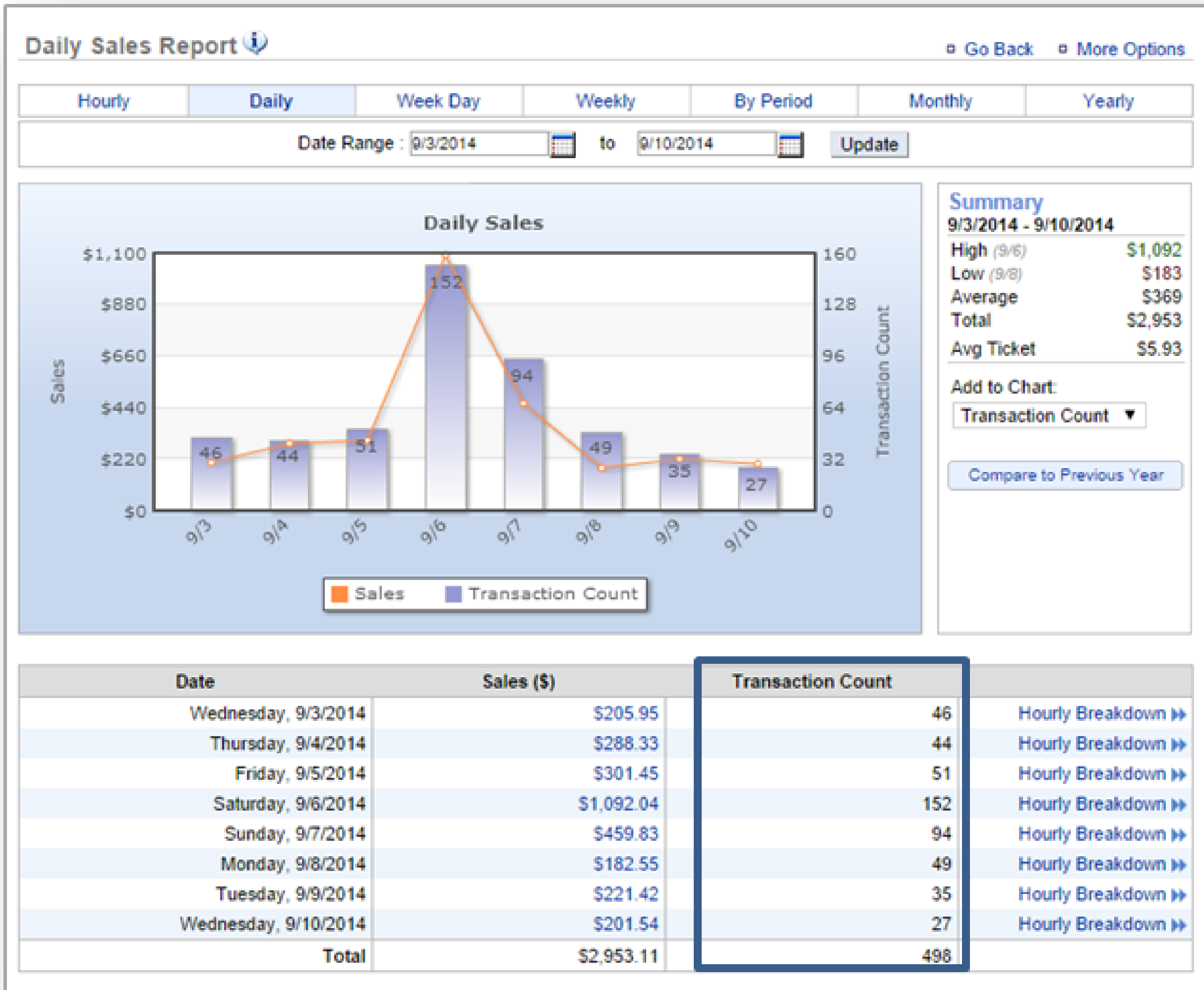
- **Select your view** (e.g. Hourly, Daily, Week Day, Weekly, By Period, Month or Year). To do so, mouse over to your preference at the top of the chart and click it.
- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select ***Transaction Count***.
- **Compare sales to previous year.** Click on the ***Compare Sales to Previous Year*** link to see a comparison.
- **View individual transactions for a specified period of time.** Click on any sales figure within the chart detail section to see a breakdown of individual transactions within a specified period of time.
- **View an hourly breakdown of sales.** Click ***Hourly Breakdown*** to the right of any sales figure in the chart detail section to see the hourly breakdown of sales for a specific day.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



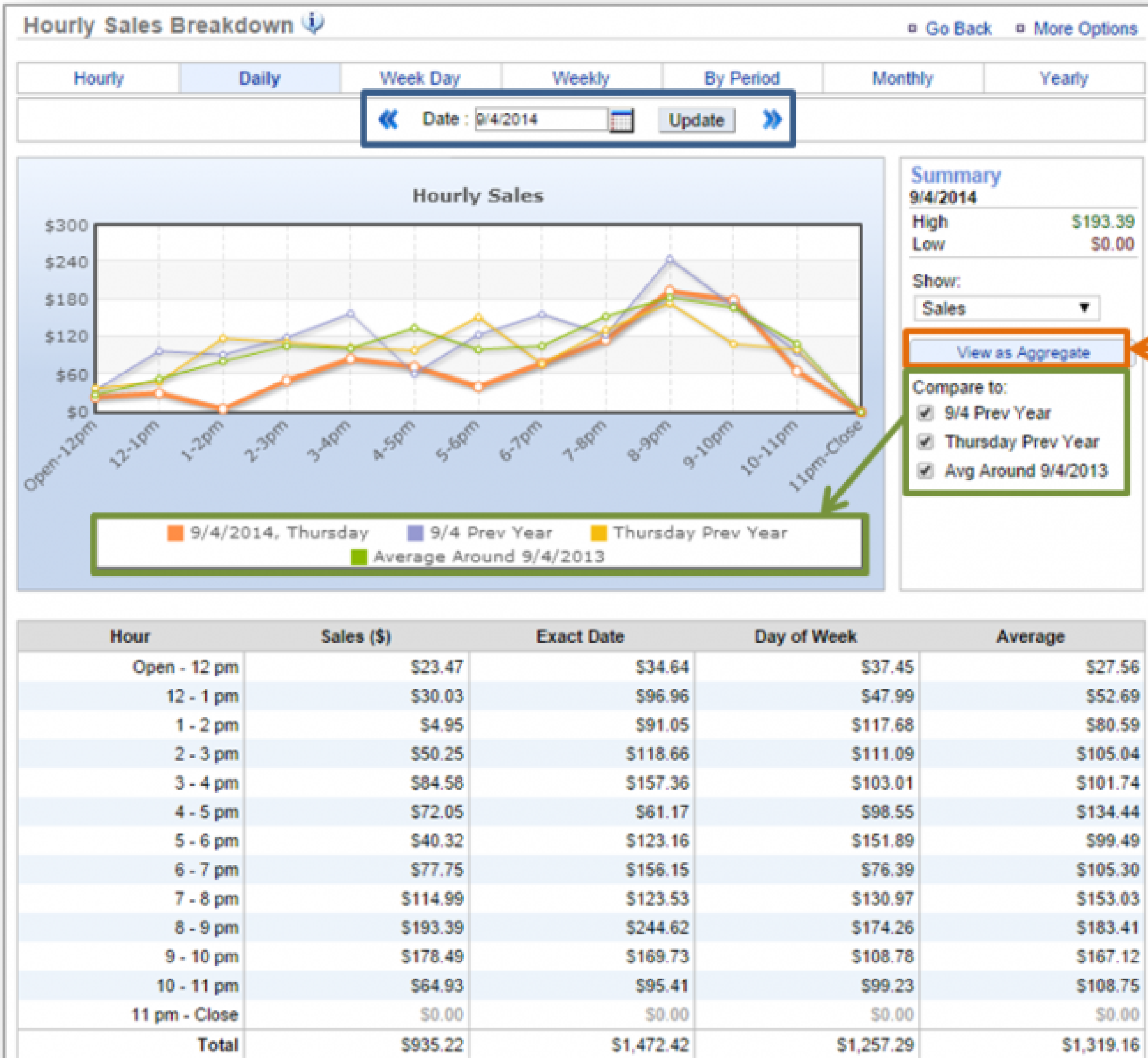
Transaction Count Report

When you select the option to view a sales report by ***Transaction Count***, transaction counts will appear with sales information on the chart and within the chart detail section below. You can also access individual transactions and the hourly breakdowns from this screen.

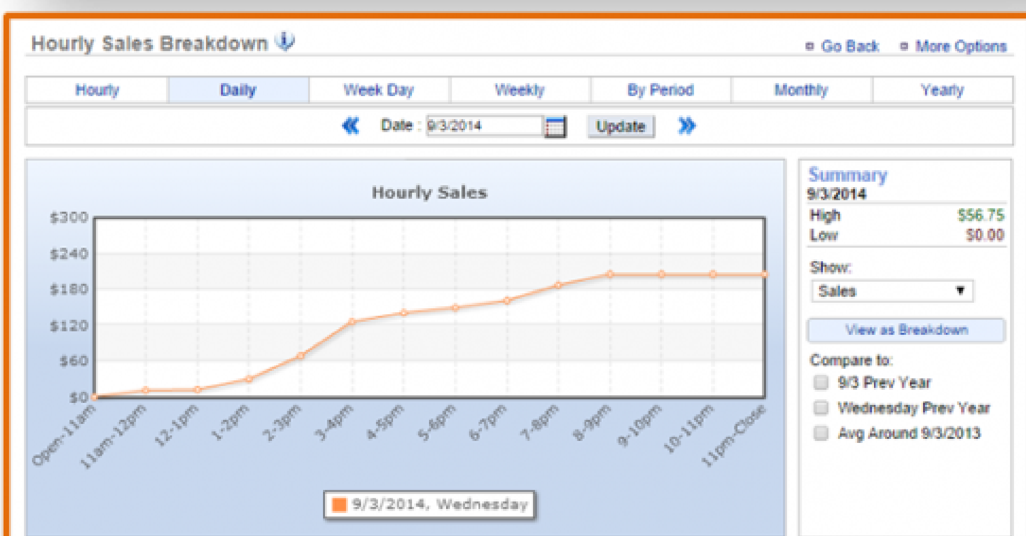


Hourly Breakdown

When viewing the *Hourly Sales Breakdown*, you will have the option to compare those sales against sales of the same date of the previous year, the same week day of the previous year, and/or the average around the same day of the previous year. You will also be able to view your data as an aggregate; which tracks sales growth throughout the day.



Hour	Sales ($)	Exact Date	Day of Week	Average
Open - 12 pm	$23.47	$34.64	$37.45	$27.56
12 - 1 pm	$30.03	$96.96	$47.99	$52.69
1 - 2 pm	$4.95	$91.05	$117.68	$80.59
2 - 3 pm	$50.25	$118.66	$111.09	$105.04
3 - 4 pm	$84.58	$157.36	$103.01	$101.74
4 - 5 pm	$72.05	$61.17	$98.55	$134.44
5 - 6 pm	$40.32	$123.16	$151.89	$99.49
6 - 7 pm	$77.75	$156.15	$76.39	$105.30
7 - 8 pm	$114.99	$123.53	$130.97	$153.03
8 - 9 pm	$193.39	$244.62	$174.26	$183.41
9 - 10 pm	$178.49	$169.73	$108.78	$167.12
10 - 11 pm	$64.93	$95.41	$99.23	$108.75
11 pm - Close	$0.00	$0.00	$0.00	$0.00
Total	$935.22	$1,472.42	$1,257.29	$1,319.16



Related Topics

[Additional Sales Reports]

[Inventory Reports]

[Product Mix Reports]

[Labor Reports]

[Training Reports]

[Survey Reports]

Additional Sales Reports

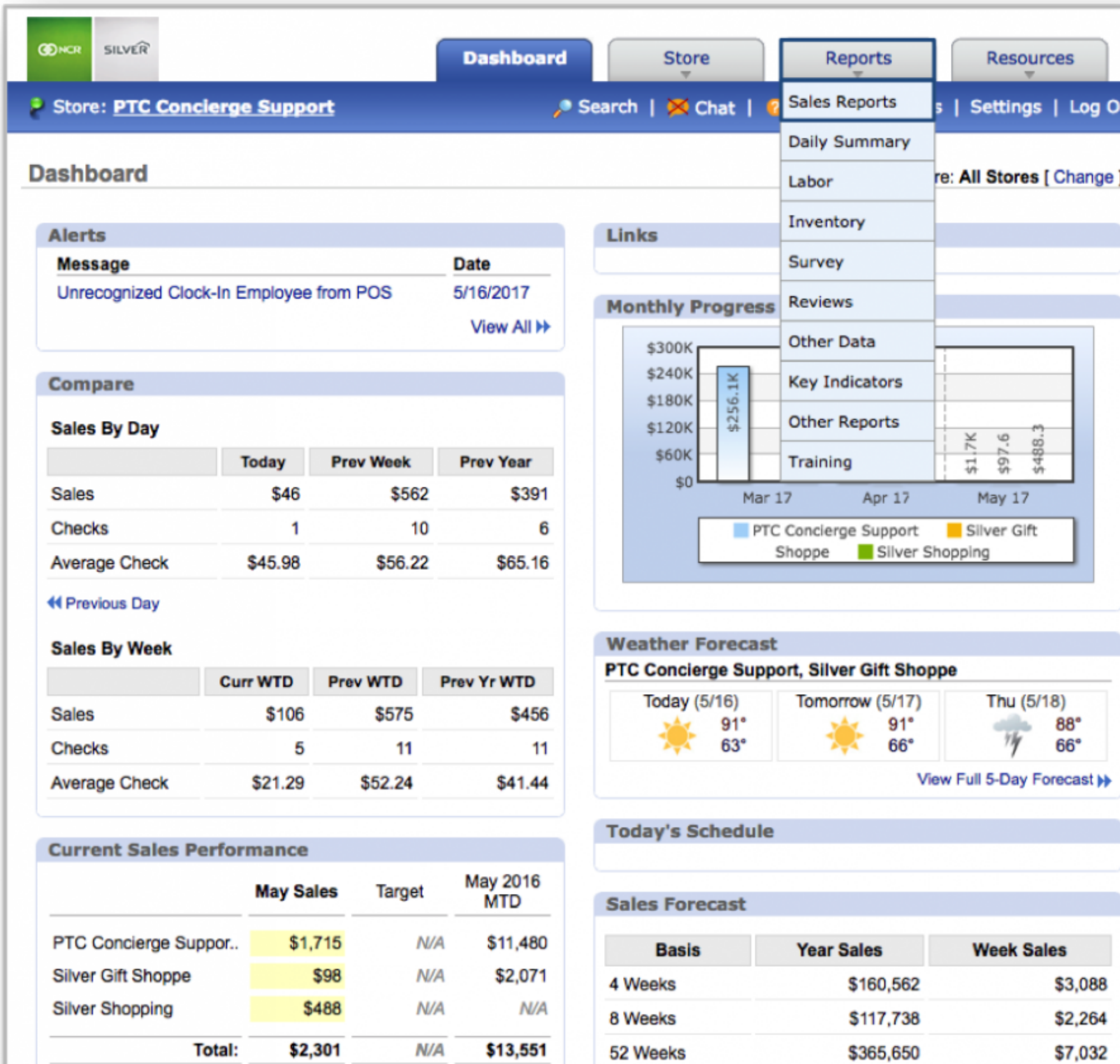
The purpose of this section is to showcase the additional reports within the Sales Report category. Click on a report below for more detailed information.

Hourly Report

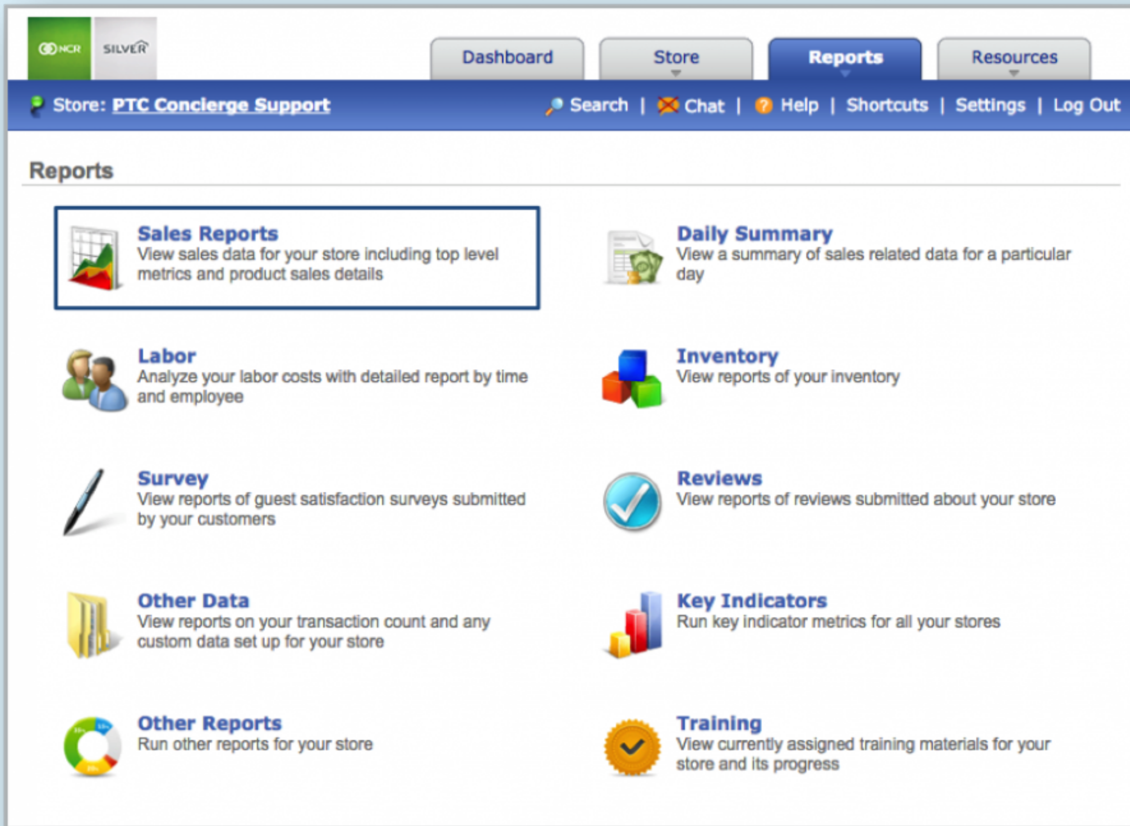
The purpose of this section is to showcase the *Hourly Sales Report* category.

Hourly Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



✻ ***Hint:*** You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

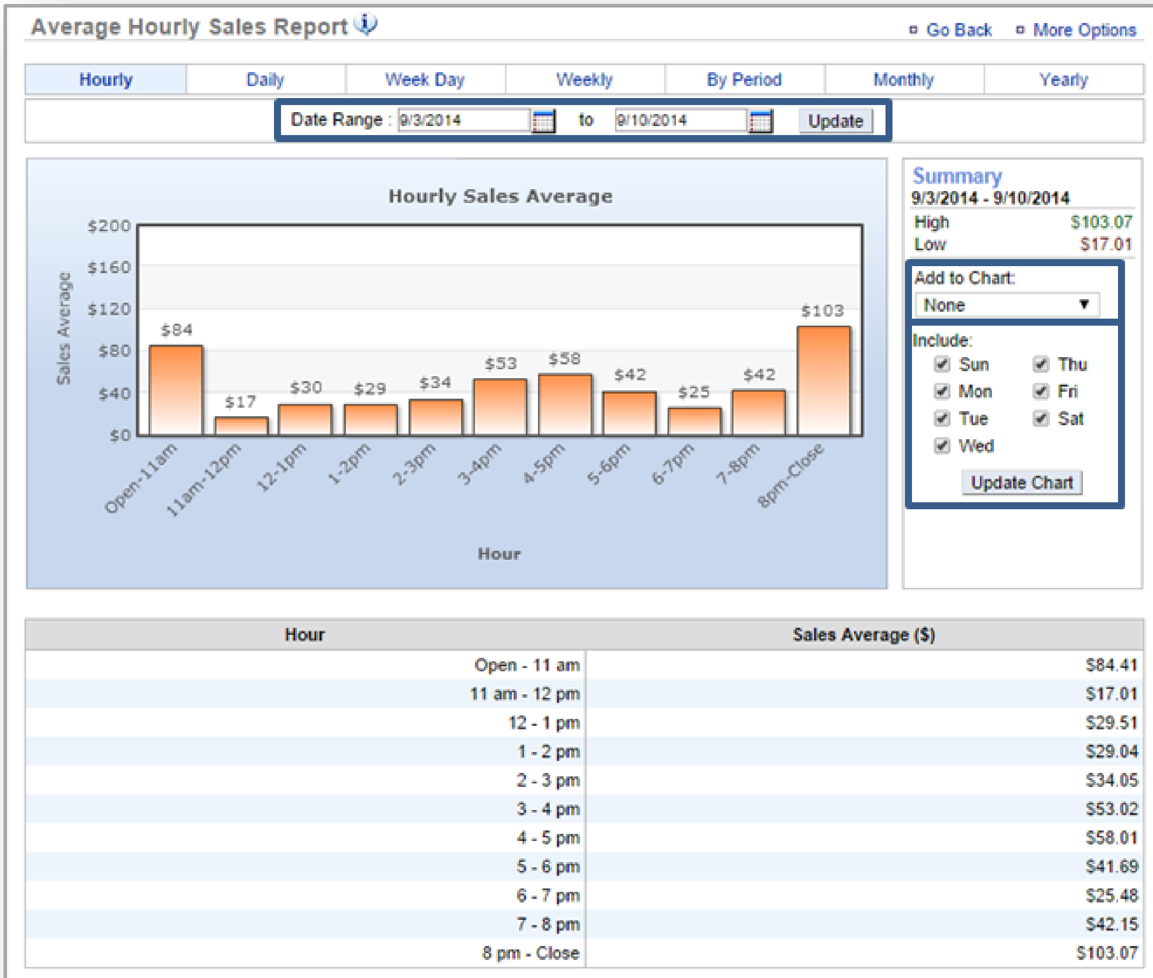


STEP 2: The ***Daily Sales Report*** will automatically appear on screen. To select the hourly report view, mouse over to the ***Hourly*** tab at the top of the chart and click it.

The *Hourly Sales Report* will provide you with sales information during specified times of day within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select ***Transaction Count***.
- **Specify the day(s) of the week you wish to view.** To do so, un-check those days you wish to remove from view and click ***Update***.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



Related Topics

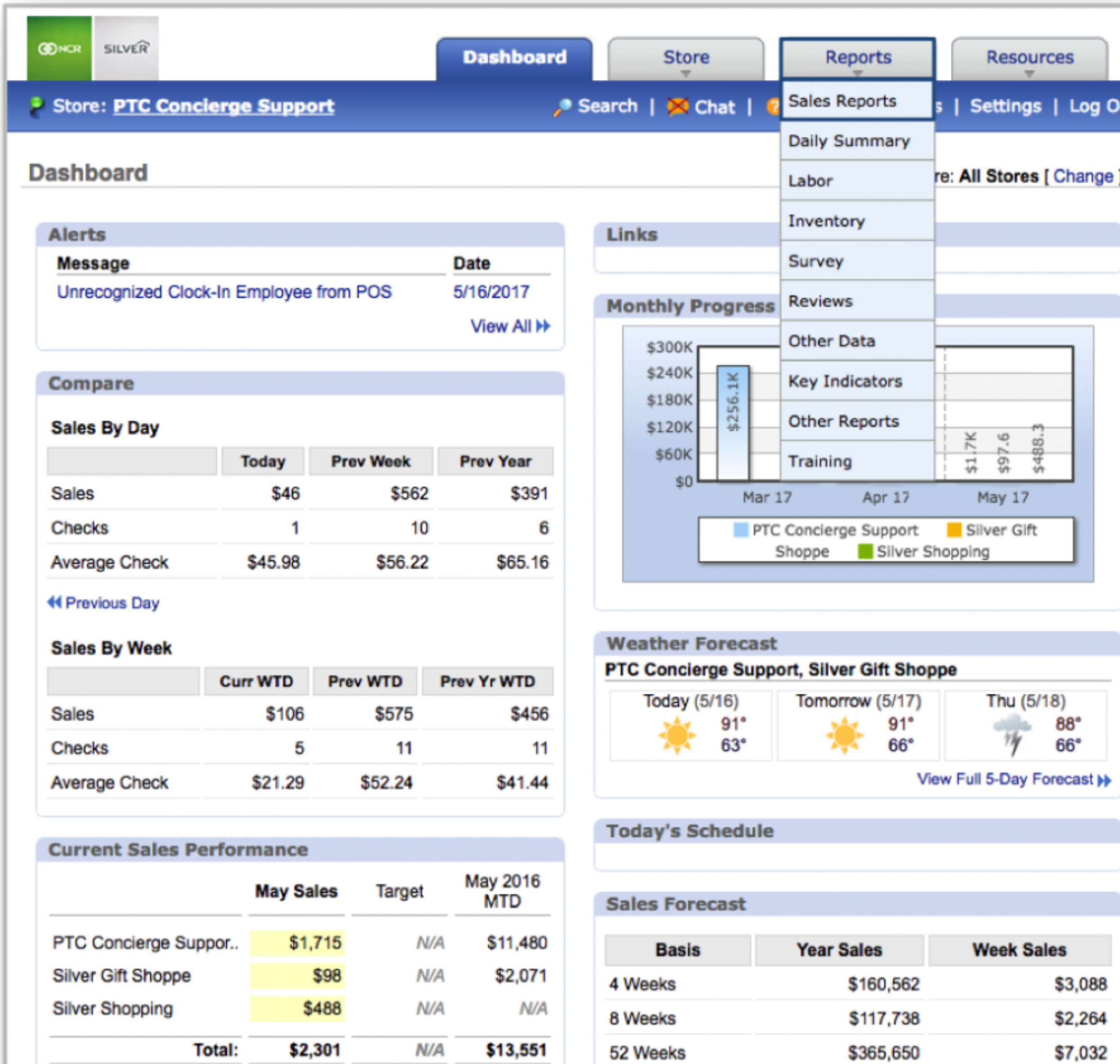
[Daily Sales Report]
[Week Day Sales Report]
[Weekly Sales Report]
[By Period Sales Report]
[Monthly Sales Report]
[Yearly Sales Report]

Week Day Report

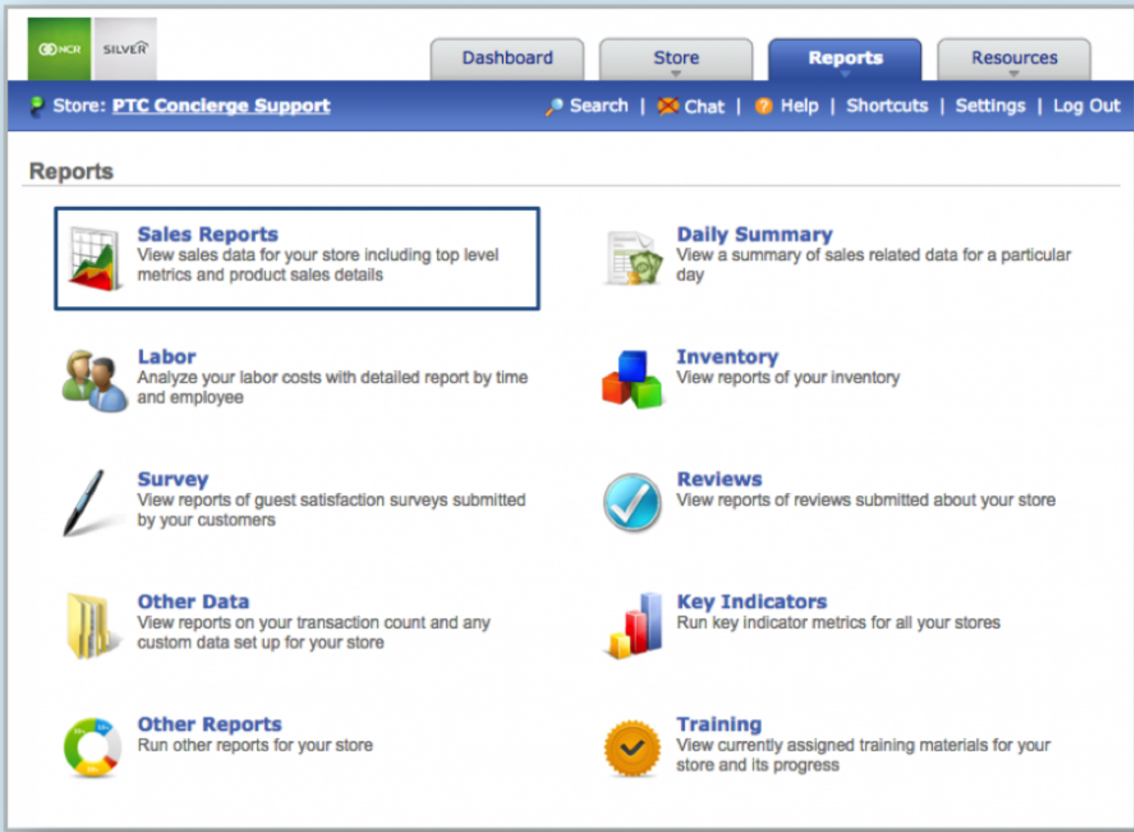
The purpose of this section is to showcase the *Week Day Sales Report* category.

Week Day Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



✻ ***Hint:*** You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

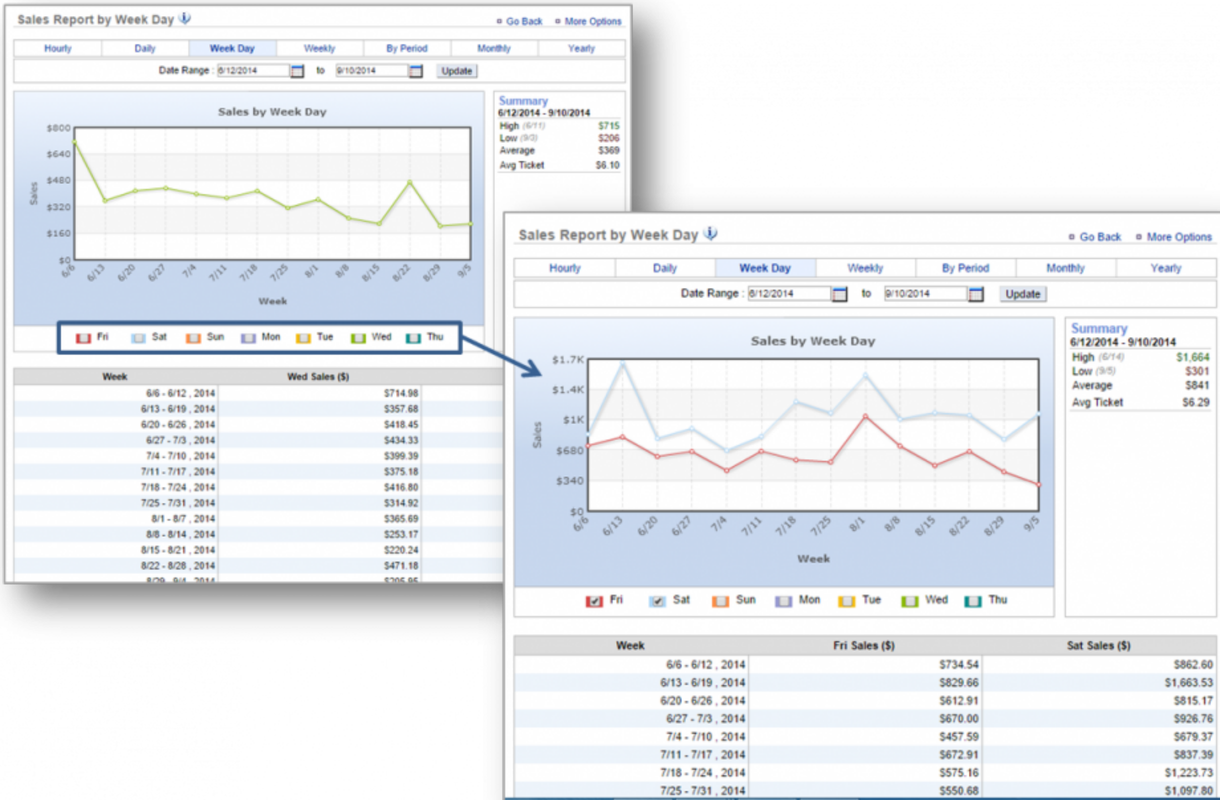


STEP 2: The ***Daily Sales Report*** will automatically appear on screen. To select the week day report view, mouse over to the ***Week Day*** tab at the top of the chart and click it.

The *Week Day Report* will provide you with sales information for each day of the week within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **Specify the day(s) of the week you wish to view.** To do so, check those days at the bottom of your chart that you wish to add to your view.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



Related Topics

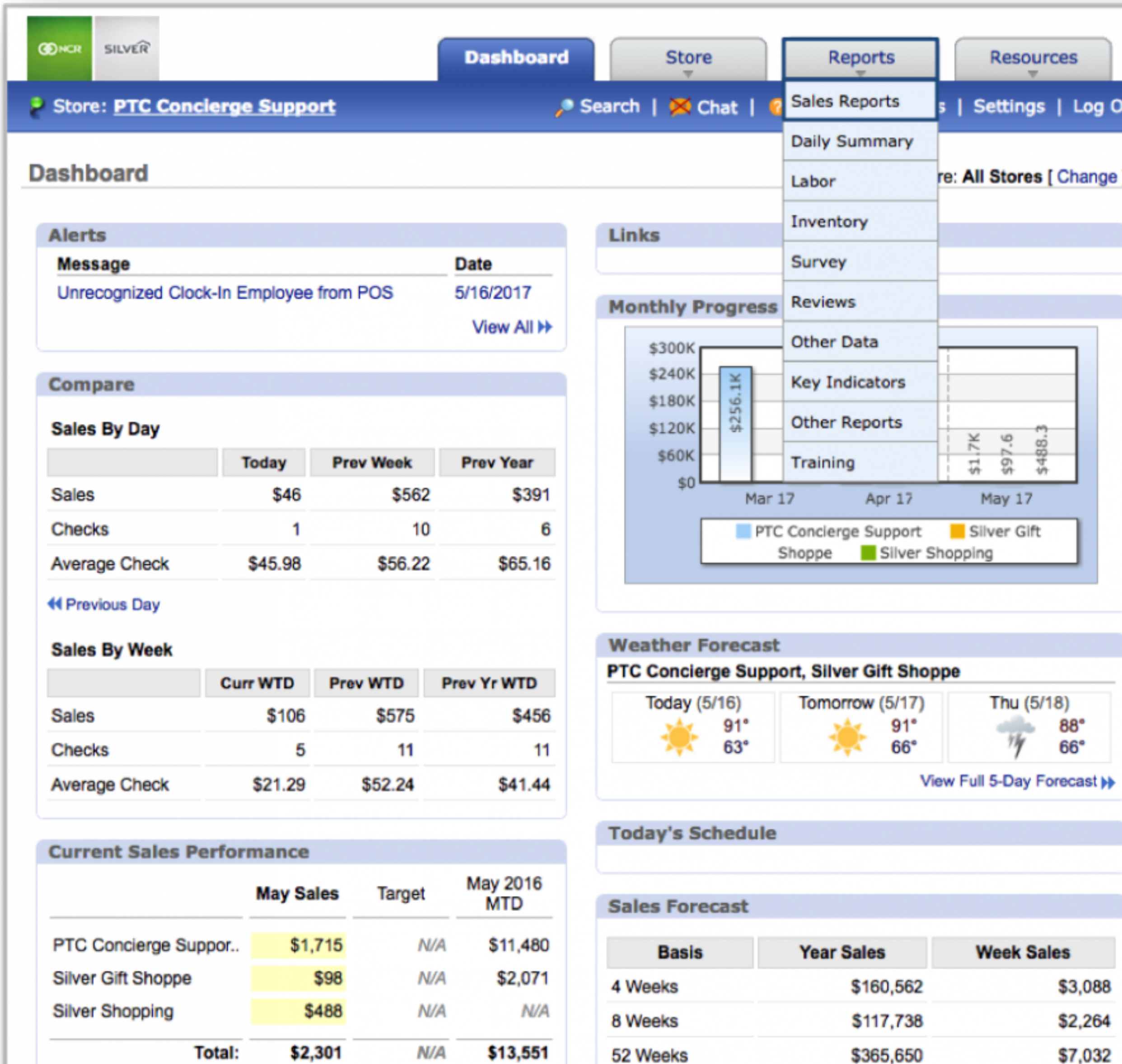
[Daily Sales Report]
[Weekly Sales Report]
[By Period Sales Report]
[Monthly Sales Report]
[Yearly Sales Report]

Weekly Report

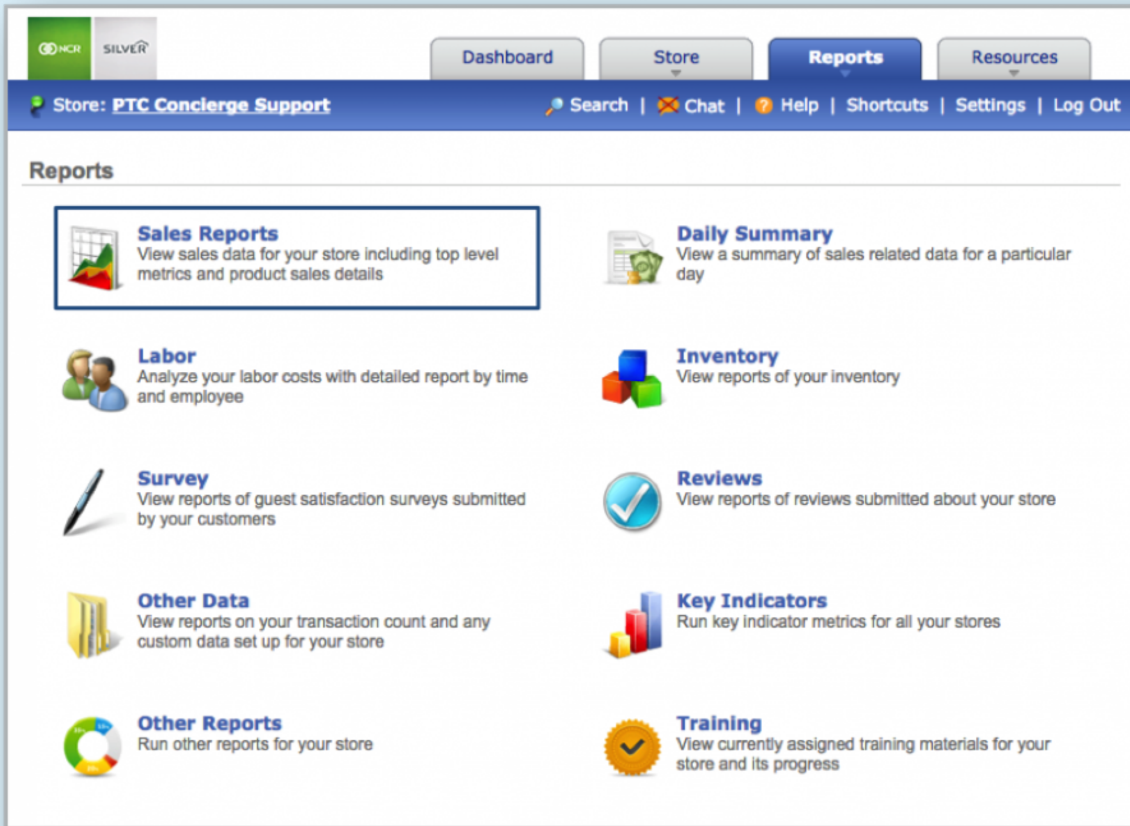
The purpose of this section is to showcase the *Weekly Sales Report* category.

Weekly Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



Hint: You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

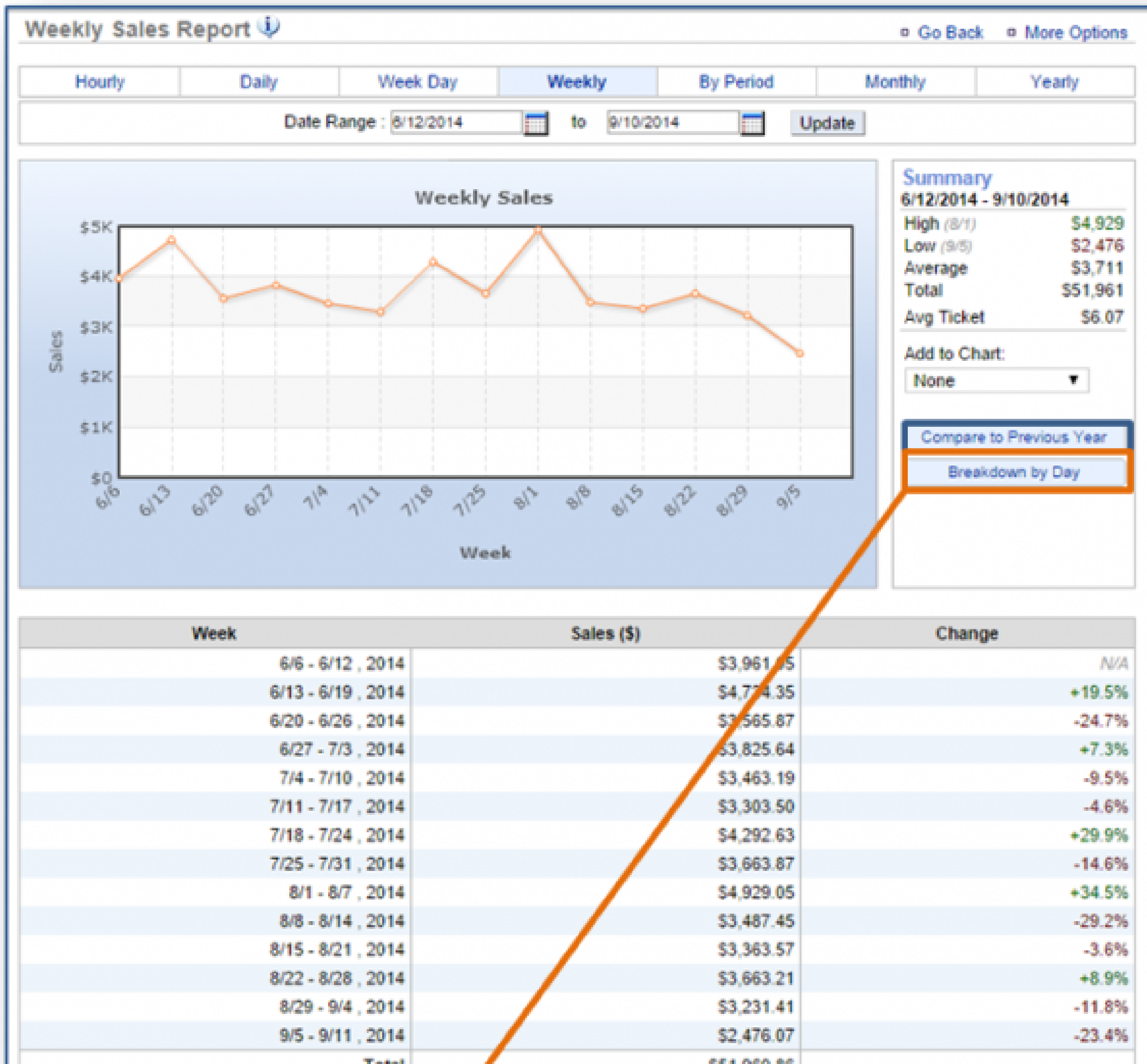


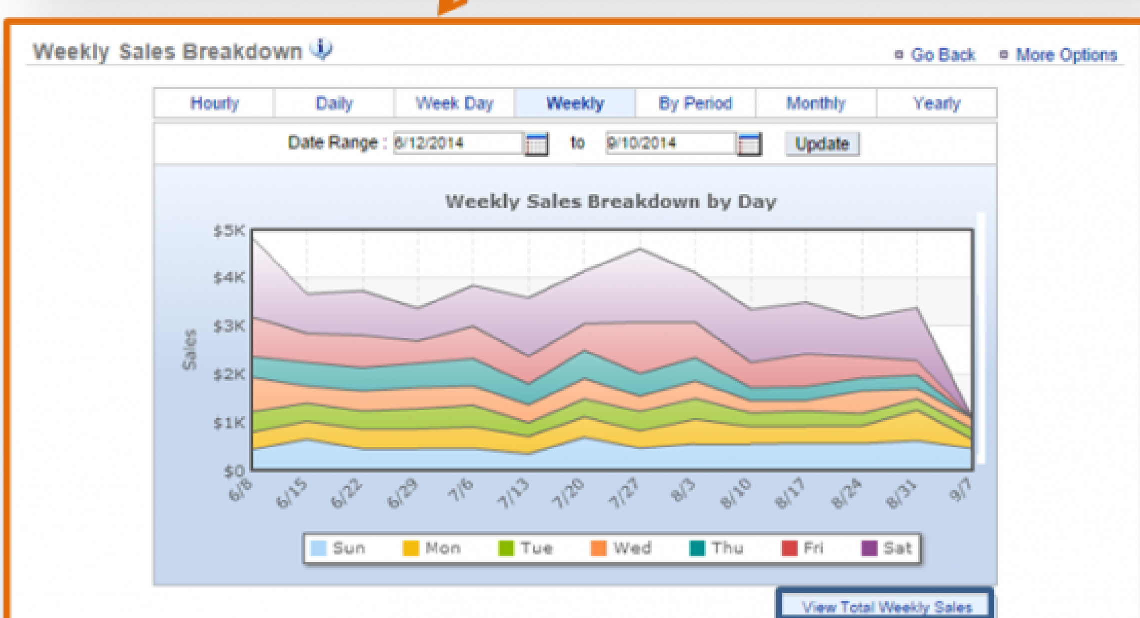
STEP 2: The ***Weekly Sales Report*** will automatically appear on screen. To select the weekly report view, mouse over to the ***Weekly*** tab at the top of the chart and click it.

The *Weekly Report* will provide you with sales information for each week within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **Compare sales to previous year.** Click on the ***Compare Sales to Previous Year*** link to see a comparison.
- **View breakdown by day.** Click ***Breakdown by Day*** to the right of the chart to see the breakdown by day.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.


Weekly Sales Report
Go Back
More Options
Hourly
Daily
Week Day
Weekly
By Period
Monthly
Yearly
Date Range : 6/12/2014 to 9/10/2014
Update
Weekly Sales
$5K
$4K
$3K
$2K
$1K
$0
Sales
6/6
6/13
6/20
6/27
7/4
7/11
7/18
7/25
8/1
8/8
8/15
8/22
8/29
9/5
Week
Summary
6/12/2014 - 9/10/2014
High (8/1) $4,929
Low (9/5) $2,476
Average $3,711
Total $51,961
Avg Ticket $6.07
Add to Chart:
None
Compare to Previous Year
Breakdown by Day
Week
Sales ($)
Change
6/6 - 6/12 , 2014 N/A
6/13 - 6/19 , 2014 +19.5%
6/20 - 6/26 , 2014 -24.7%
6/27 - 7/3 , 2014 $3,825.64 +7.3%
7/4 - 7/10 , 2014 $3,463.19 -9.5%
7/11 - 7/17 , 2014 $3,303.50 -4.6%
7/18 - 7/24 , 2014 $4,292.63 +29.9%
7/25 - 7/31 , 2014 $3,663.87 -14.6%
8/1 - 8/7 , 2014 $4,929.05 +34.5%
8/8 - 8/14 , 2014 $3,487.45 -29.2%
8/15 - 8/21 , 2014 $3,363.57 -3.6%
8/22 - 8/28 , 2014 $3,663.21 +8.9%
8/29 - 9/4 , 2014 $3,231.41 -11.8%
9/5 - 9/11 , 2014 $2,476.07 -23.4%


Weekly Sales Breakdown
Go Back
More Options
Hourly
Daily
Week Day
Weekly
By Period
Monthly
Yearly
Date Range : 6/12/2014 to 9/10/2014
Update
Weekly Sales Breakdown by Day
$5K
$4K
$3K
$2K
$1K
$0
Sales
6/8
6/15
6/22
6/29
7/6
7/13
7/20
7/27
8/3
8/10
8/17
8/24
8/31
9/7
Sun
Mon
Tue
Wed
Thu
Fri
Sat
View Total Weekly Sales

Related Topics

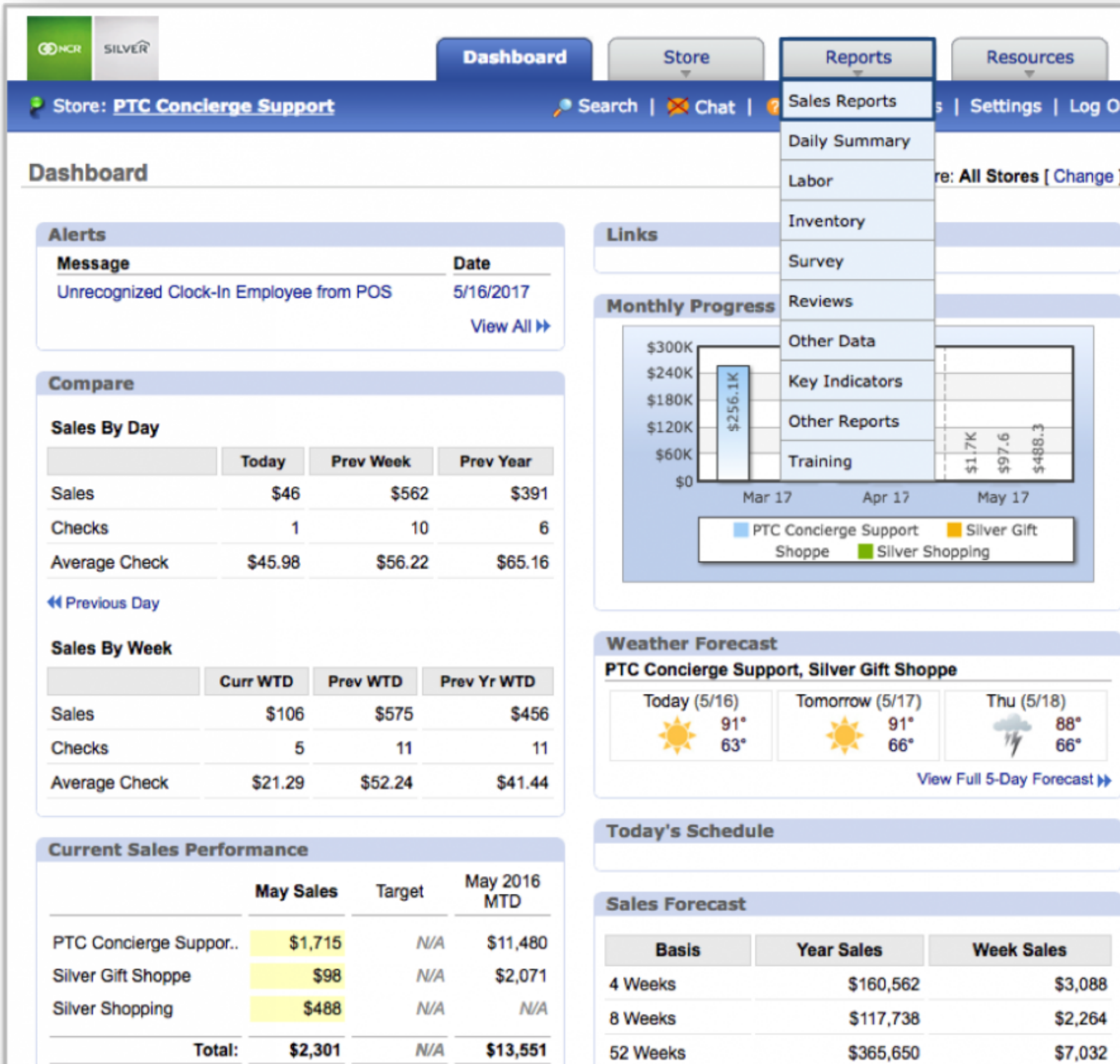
[Daily Sales Report]
[Week Day Sales Report]
[By Period Sales Report]
[Monthly Sales Report]
[Yearly Sales Report]

By Period Report

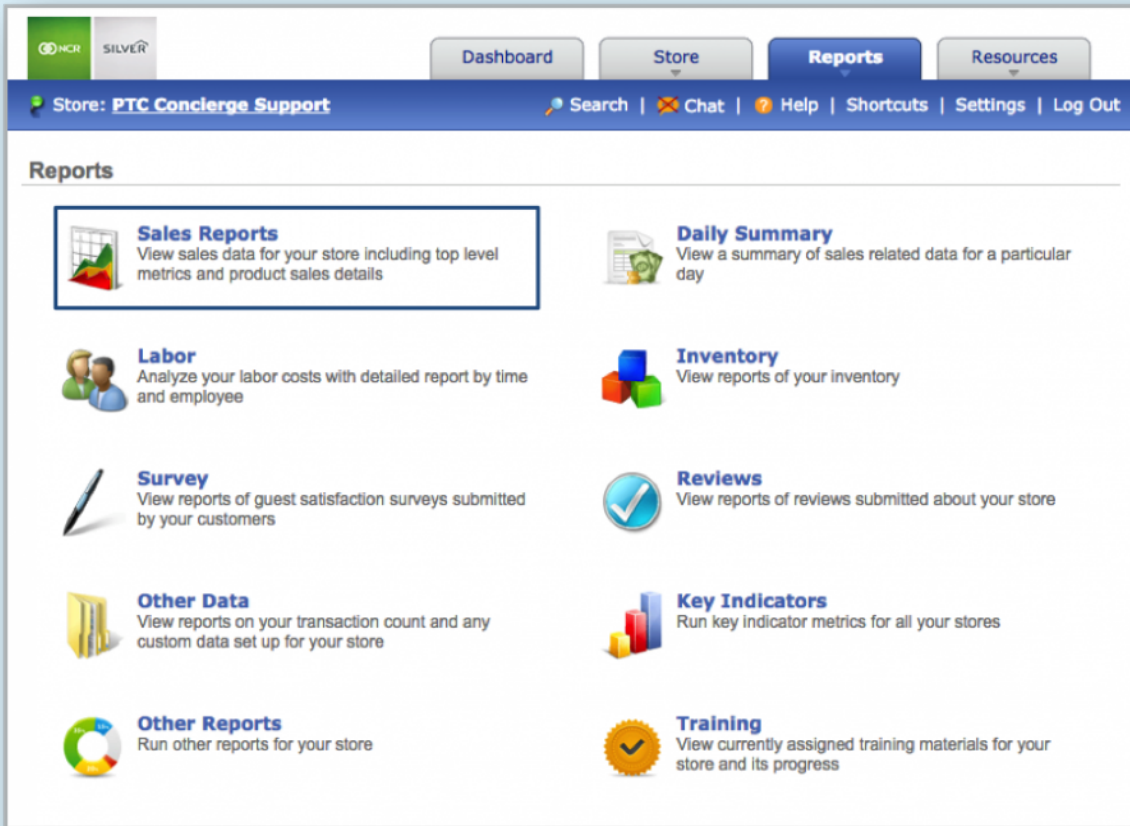
The purpose of this section is to showcase the *By Period Sales Report* category.

By Period Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



Hint: You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

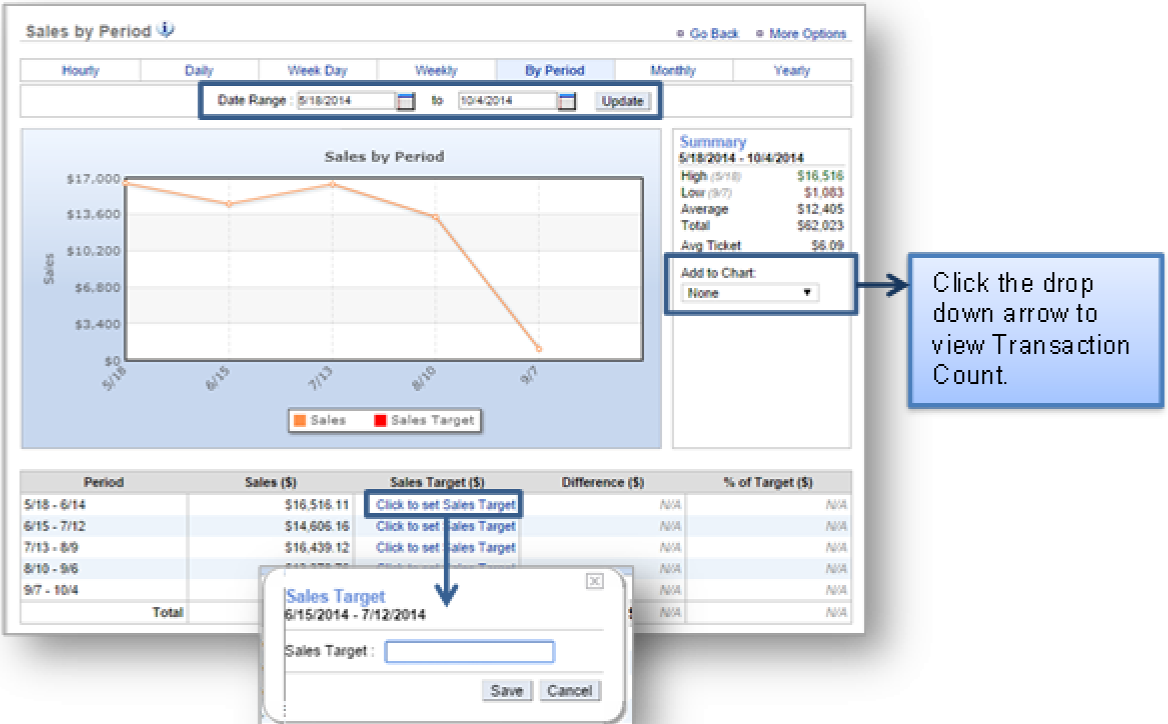


STEP 2: The ***Daily Sales Report*** will automatically appear on screen. To select the by period report view, mouse over to the ***By Period*** tab at the top of the chart and click it.

The *By Period Report* will provide you with sales information for each period within your fiscal calendar and for the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select ***Transaction Count***.
- **Set a sales target.** Click ***Click to set Sales Target*** to the right of any period to enter your target. Click ***Save*** when done.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



Related Topics

Daily Sales Report

Week Day Sales Report

Weekly Sales Report

Monthly Sales Report

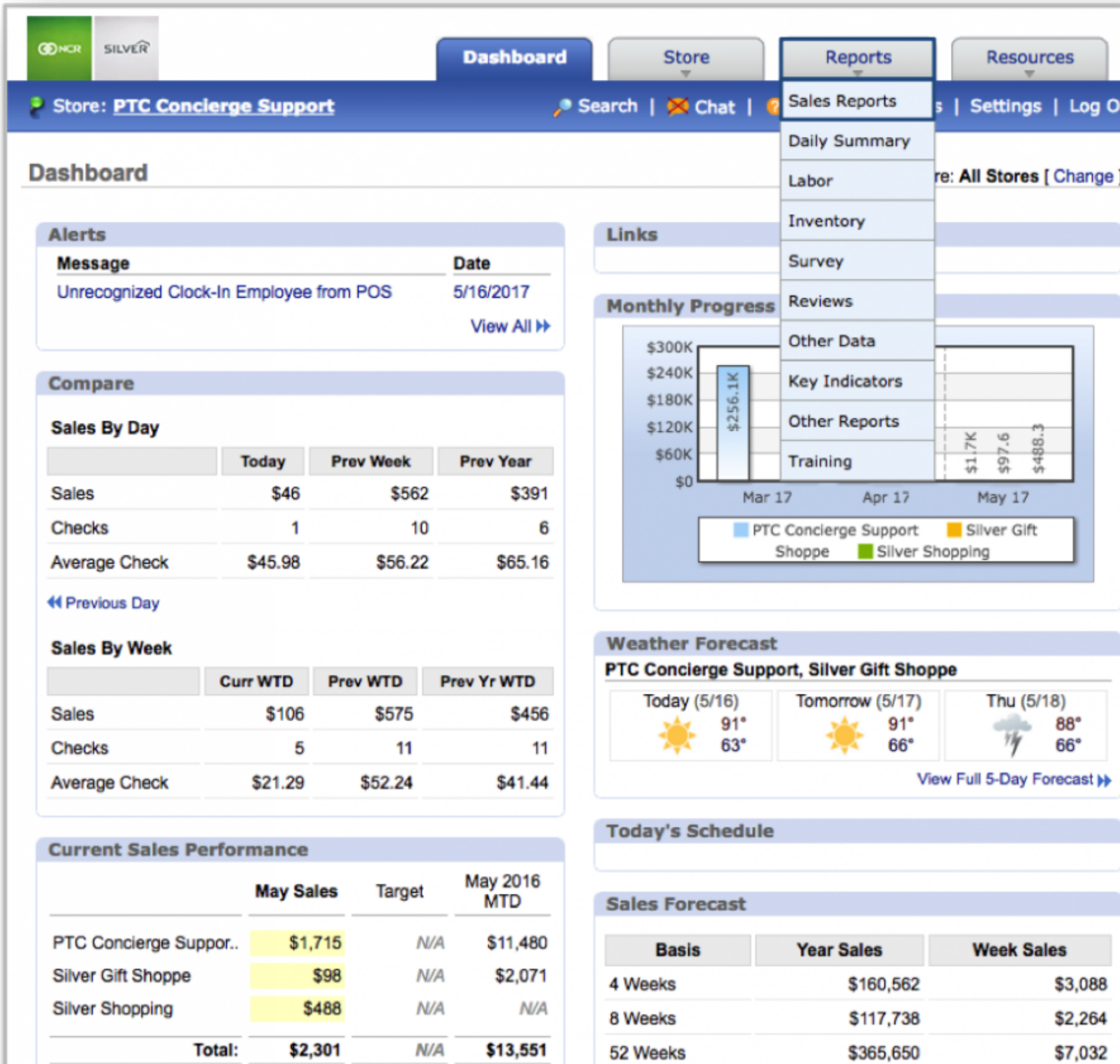
Yearly Sales Report

Monthly Report

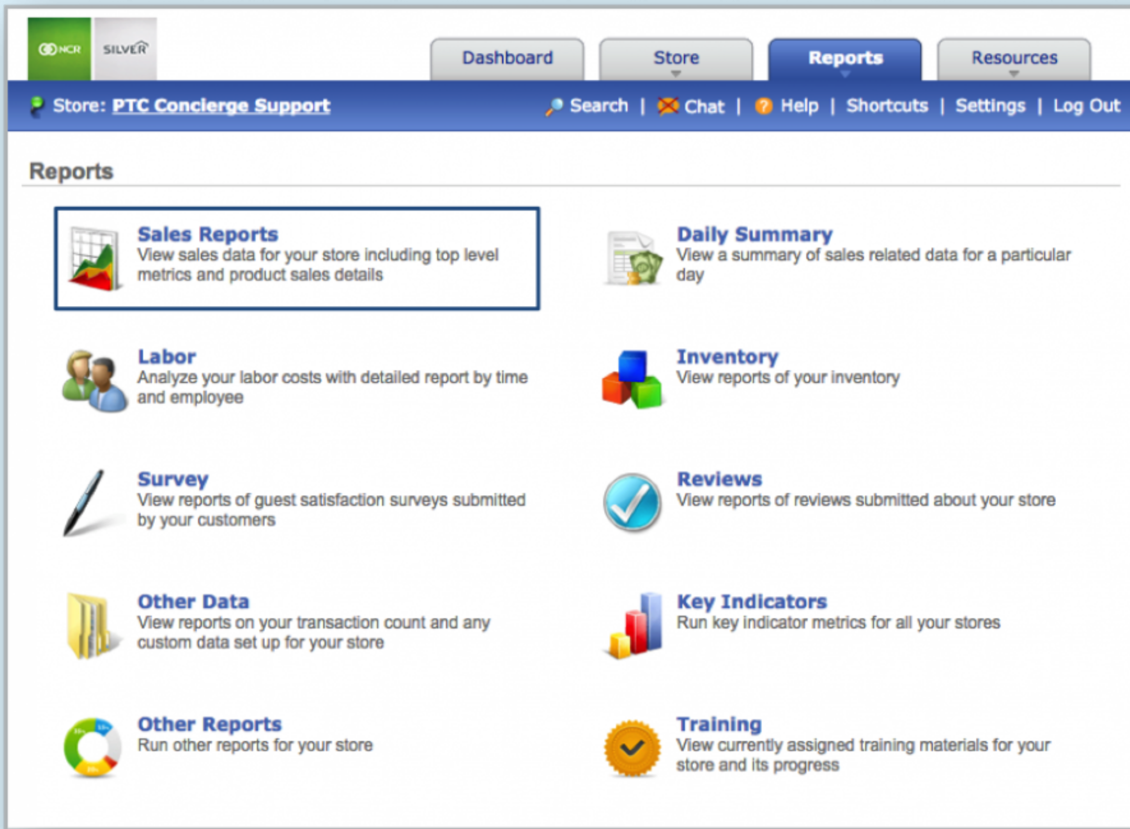
The purpose of this section is to showcase the *Monthly Sales Report* category.

Monthly Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



Hint: You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

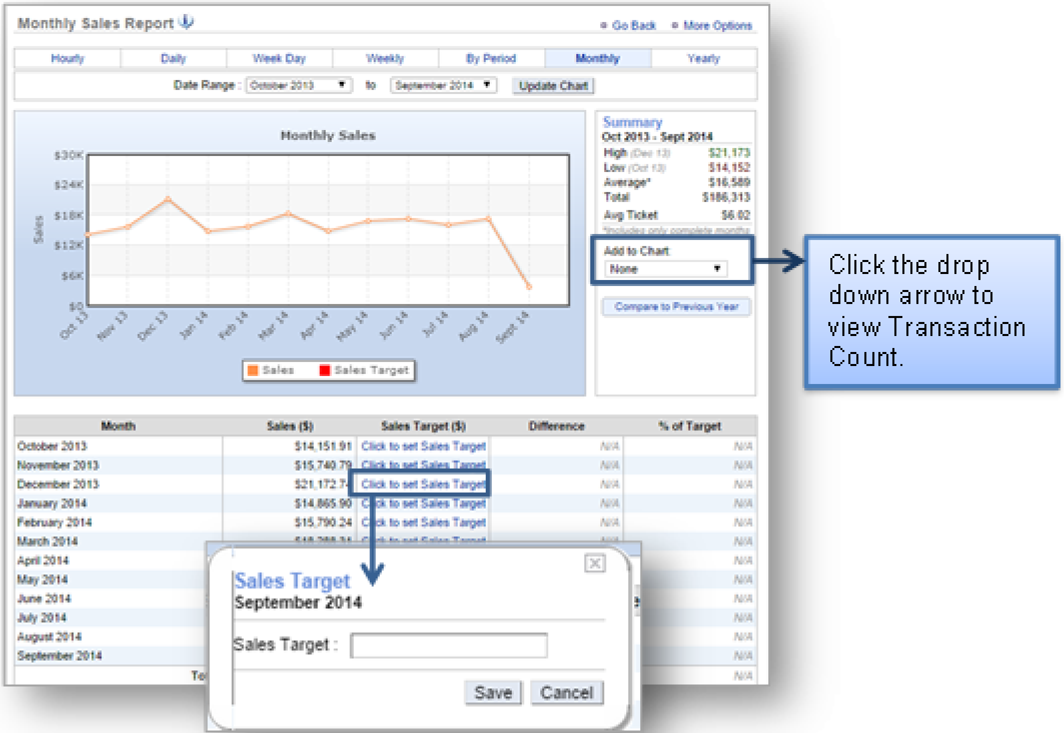


STEP 2: The ***Monthly Sales Report*** will automatically appear on screen. To select the monthly report view, mouse over to the ***Monthly*** tab at the top of the chart and click it.

The *Monthly Report* will provide you with sales information for each month within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select ***Transaction Count***.
- **Set a sales target.** Click ***Click to set Sales Target*** to the right of any period to enter your target. Click ***Save*** when done.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



Related Topics

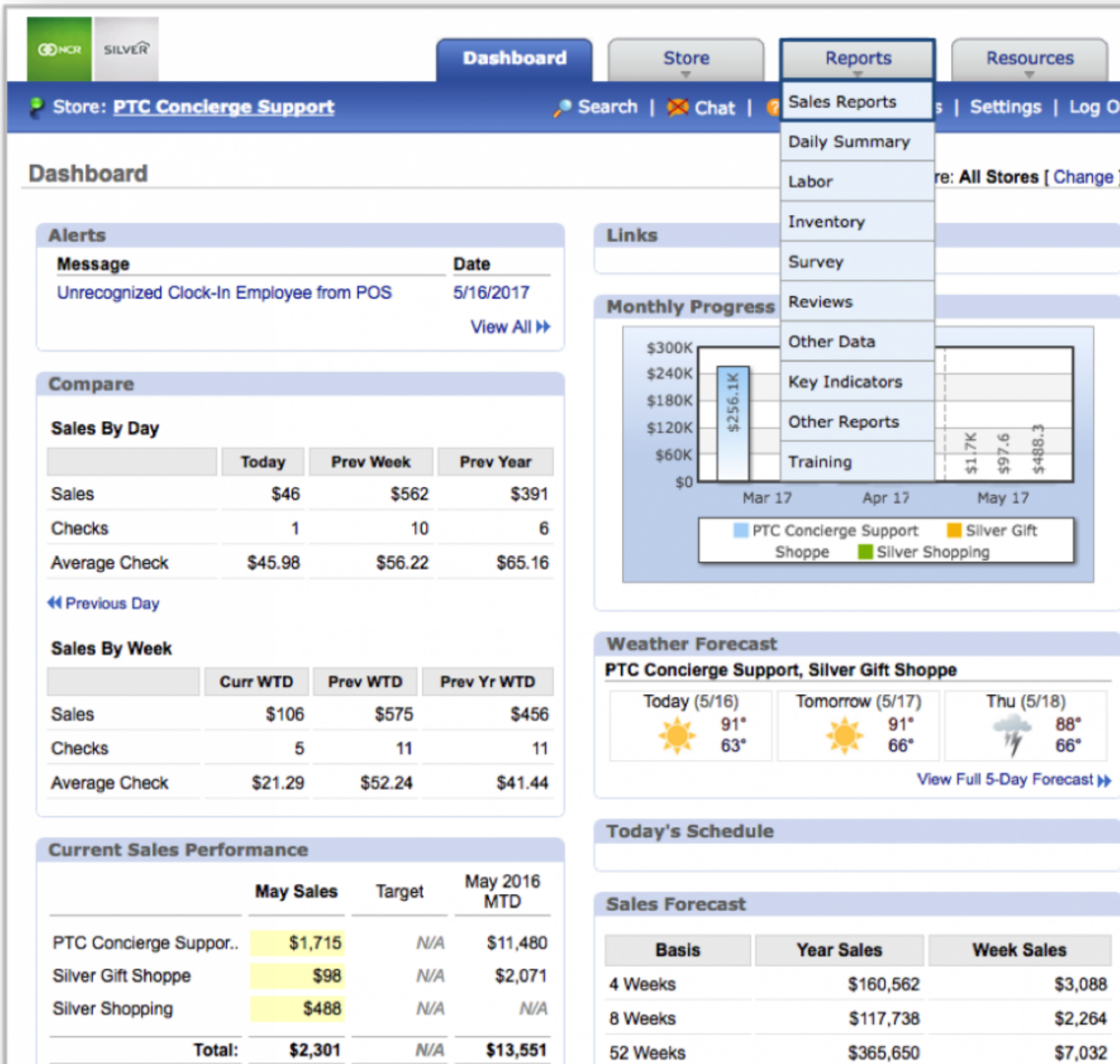
[Daily Sales Report]
[Week Day Sales Report]
[Weekly Sales Report]
[By Period Sales Report]
[Yearly Sales Report]

Yearly Report

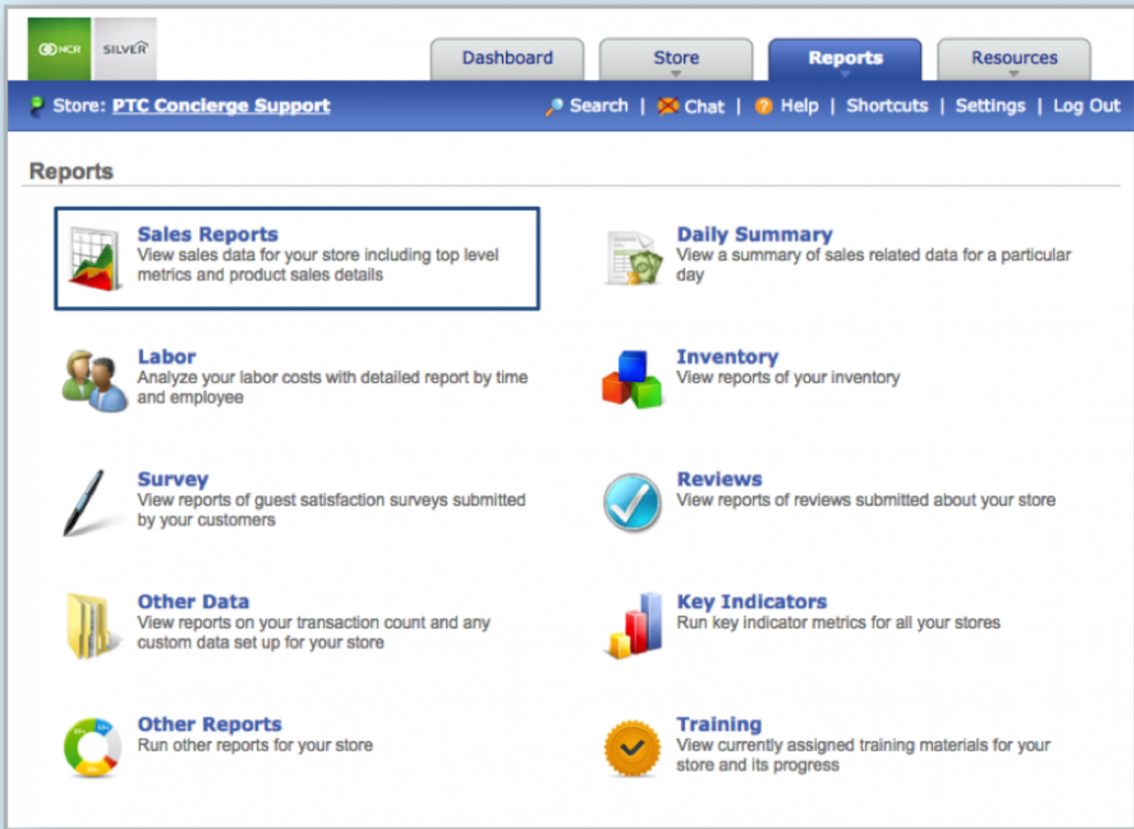
The purpose of this section is to showcase the *Yearly Sales Report* category.

Yearly Sales Report

STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales***.



✻ ***Hint:*** You can also access the *Sales Report* by clicking on the ***Reports*** tab and then on ***Sales***.

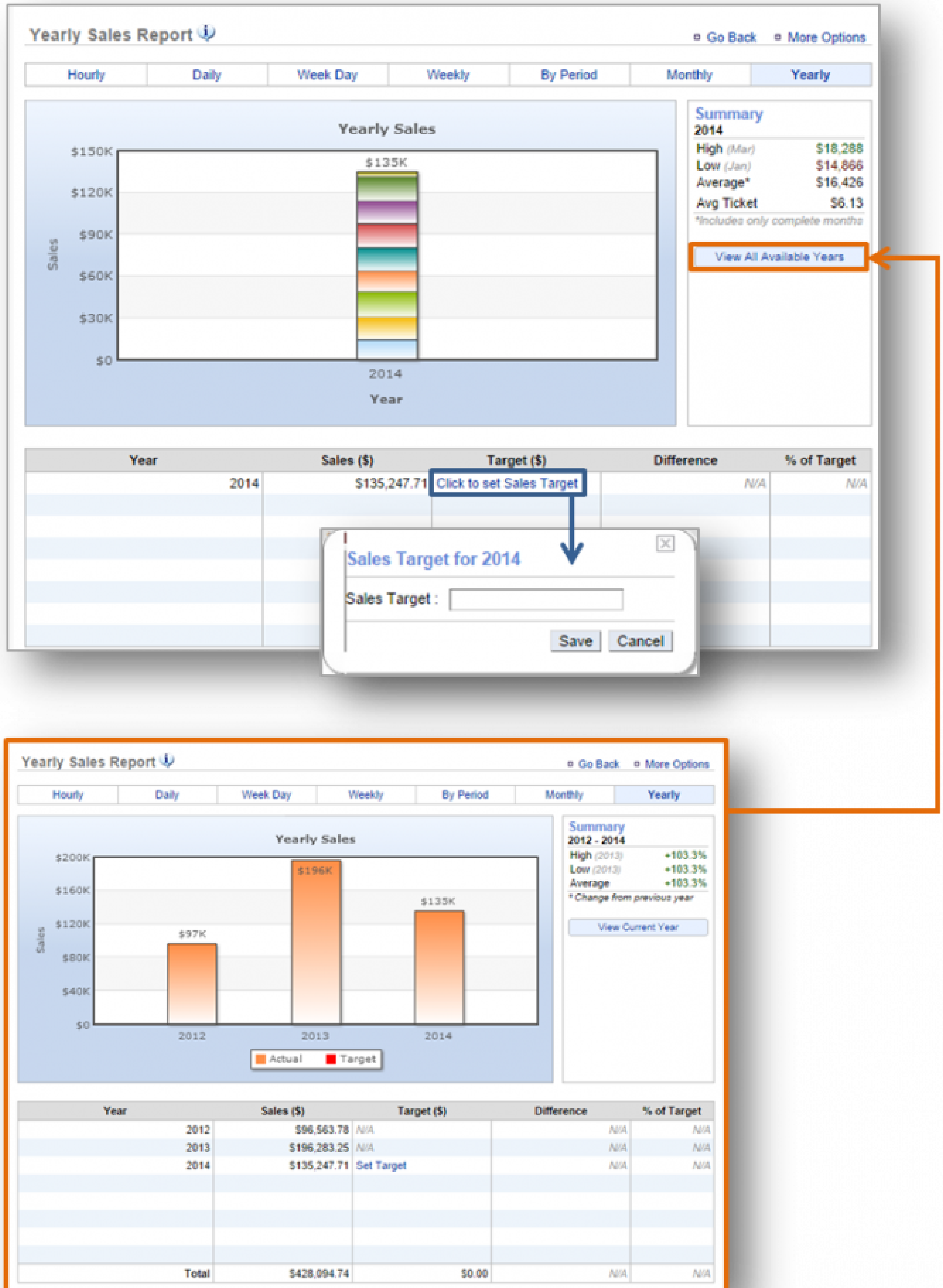


STEP 2: The ***Daily Sales Report*** will automatically appear on screen. To select the yearly report view, mouse over to the ***Yearly*** tab at the top of the chart and click it.

The *Yearly Report* will provide you with sales information for the year and within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click ***Update***.
- **View sales for all available years.** To the right of your chart, click the *View All Available Years* link.
- **Set a sales target.** Click ***Click to set Sales Target*** to the right of any period to enter your target. Click ***Save*** when done.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.


Yearly Sales Report
Go Back
More Options
Hourly
Daily
Week Day
Weekly
By Period
Monthly
Yearly
Yearly Sales
$150K
$120K
$90K
$60K
$30K
$0
$135K
Sales
2014
Year
Summary
2014
High (Mar) $18,288
Low (Jan) $14,866
Average* $16,426
Avg Ticket $6.13
*Includes only complete months
View All Available Years
Year
Sales ($)
Target ($)
Difference
% of Target
2014
$135,247.71
Click to set Sales Target
N/A
N/A
Sales Target for 2014
Sales Target :
Save
Cancel
Yearly Sales Report
Go Back
More Options
Hourly
Daily
Week Day
Weekly
By Period
Monthly
Yearly
Yearly Sales
$200K
$160K
$120K
$80K
$40K
$0
$97K
$196K
$135K
Sales
2012
2013
2014
Actual
Target
Summary
2012 - 2014
High (2013) +103.3%
Low (2013) +103.3%
Average +103.3%
* Change from previous year
View Current Year
Year
Sales ($)
Target ($)
Difference
% of Target
2012 $96,563.78 N/A N/A N/A
2013 $196,283.25 N/A N/A N/A
2014 $135,247.71 Set Target N/A N/A
Total $428,094.74 $0.00 N/A N/A

Related Topics

Daily Sales Report

Week Day Sales Report

Weekly Sales Report

By Period Sales Report

Monthly Sales Report

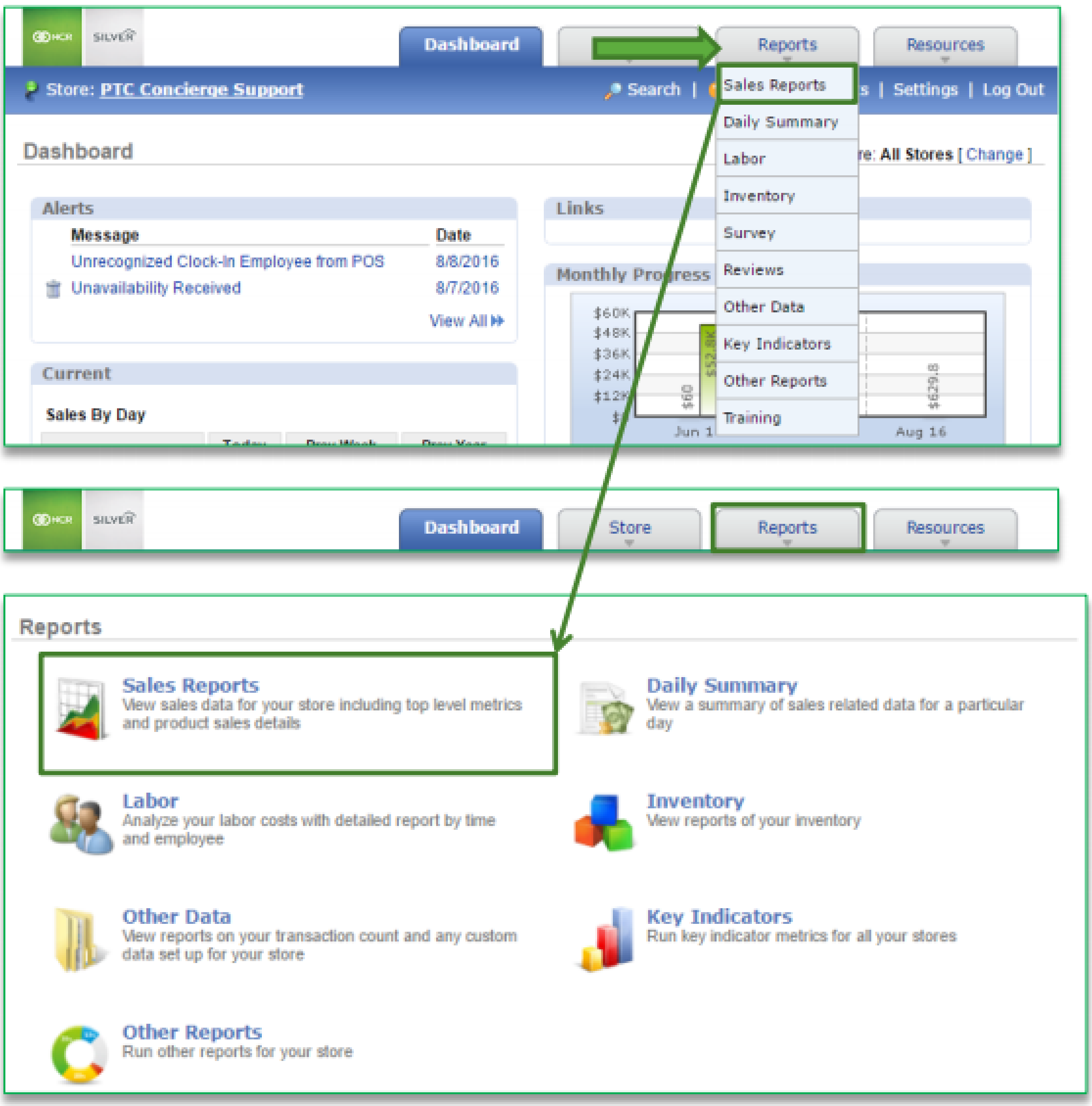
Modifier Sales Report

In this module, you will learn:

- How to navigate within the **Modifier** report

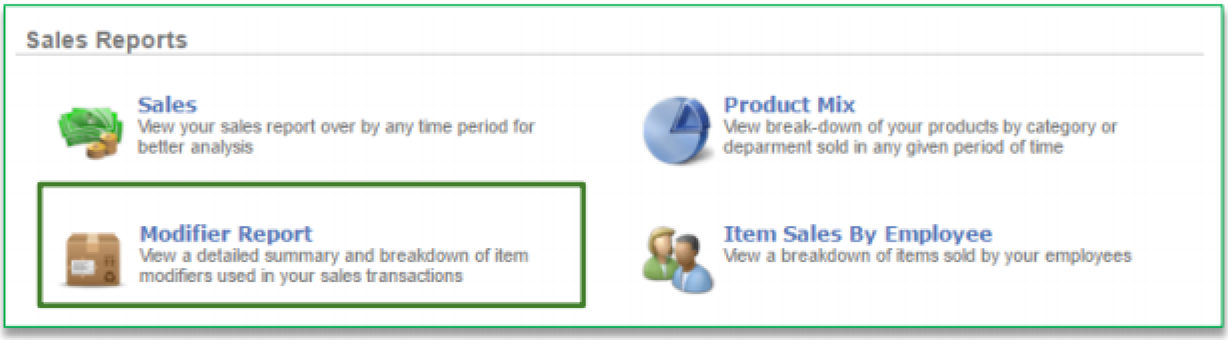
Modifier Report

To access the **Modifier** report you will need to navigate to the **Reports** module and click **Sales Reports**.

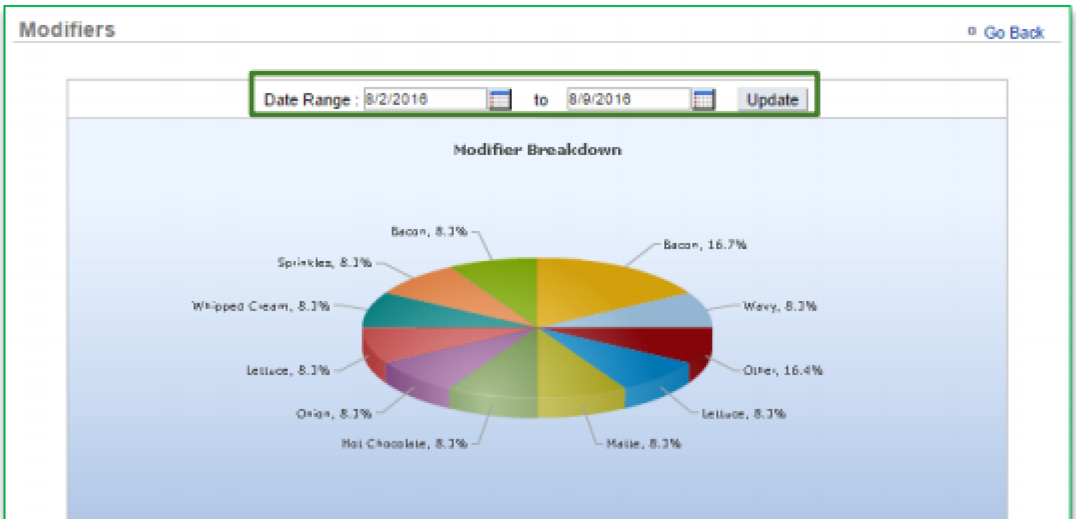


Navigating to the Modifier Report

1. Click **Modifier Report**



2. This reports defaults to the current day going back one week
3. Enter the desired date range
4. Click **Update**

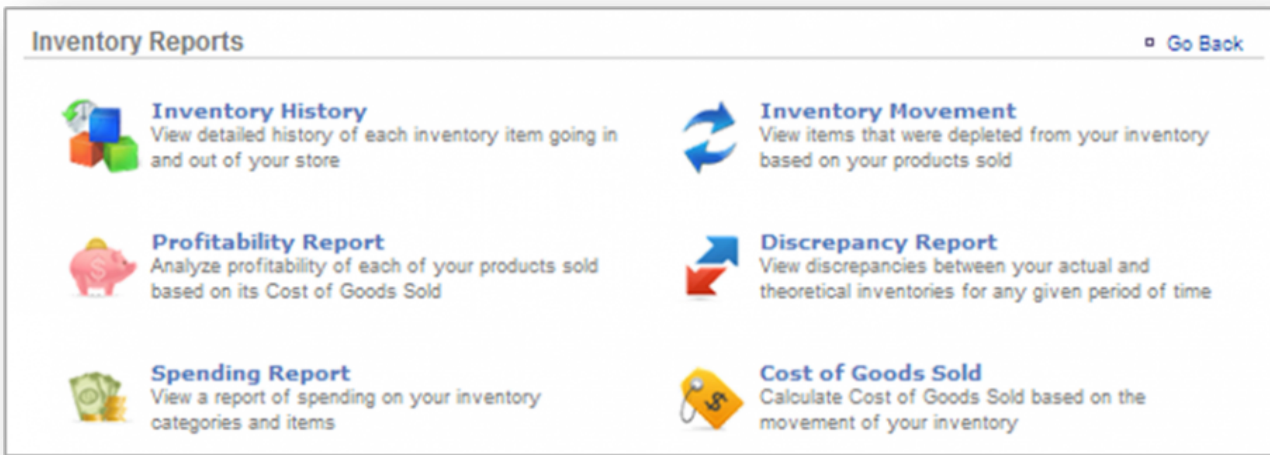


Group	Modifier	Quantity	Net Sales	% Qty	% Sales	Avg Price
TRUE BLOCK	Wavy	1	$2.50	8.3%	41.0%	$2.50
BURGER TOPPINGS	Bacon	2	$2.00	16.7%	32.8%	$1.00
BURGER TOPPINGS	Bacon	1	$1.00	8.3%	16.4%	$1.00
ICE CREAM TOPPINGS	Sprinkles	1	$0.50	8.3%	8.2%	$0.50
ICE CREAM TOPPINGS	Whipped Cream	1	$0.10	8.3%	1.6%	$0.10
BURGER TOPPINGS	Lettuce	1	$0.00	8.3%	0.0%	$0.00
BURGER TOPPINGS	Onion	1	$0.00	8.3%	0.0%	$0.00
ICE CREAM TOPPINGS	Hot Chocolate	1	$0.00	8.3%	0.0%	$0.00
TRUE BLOCK	Matte	1	$0.00	8.3%	0.0%	$0.00
BURGER TOPPINGS	Lettuce	1	$0.00	8.3%	0.0%	$0.00
BURGER TOPPINGS	Onions	1	$0.00	8.3%	0.0%	$0.00
	Total	12	$6.10	100.0%	100.0%	$0.51

- [Click here to see the full details]()

Inventory Reports

Effective inventory management can help to reduce cost of goods (COGs) by quickly managing your inventory through the CimpleBox platform. The inventory reporting feature is meant to aide you in those efforts!



In this section you will find the following resources:

Inventory History
Profitability Report
Spending Report
Inventory Movement
Discrepancy Report
Cost of Goods Sold

For more on Inventory Management:
Add Inventory: How to add inventory.
Take Inventory: How to take inventory.
How to Hide or Display Items: How to hide or display inventory items.
Manage Inventory: How to manage your inventory in the system.
How to Select a Unit of Measure: How to select and create a unit of measure.
Correcting Errors: How to correct errors after you've added or taken inventory.
How to Export Inventory: How to export your inventory database.

GLOSSARY OF TERMS

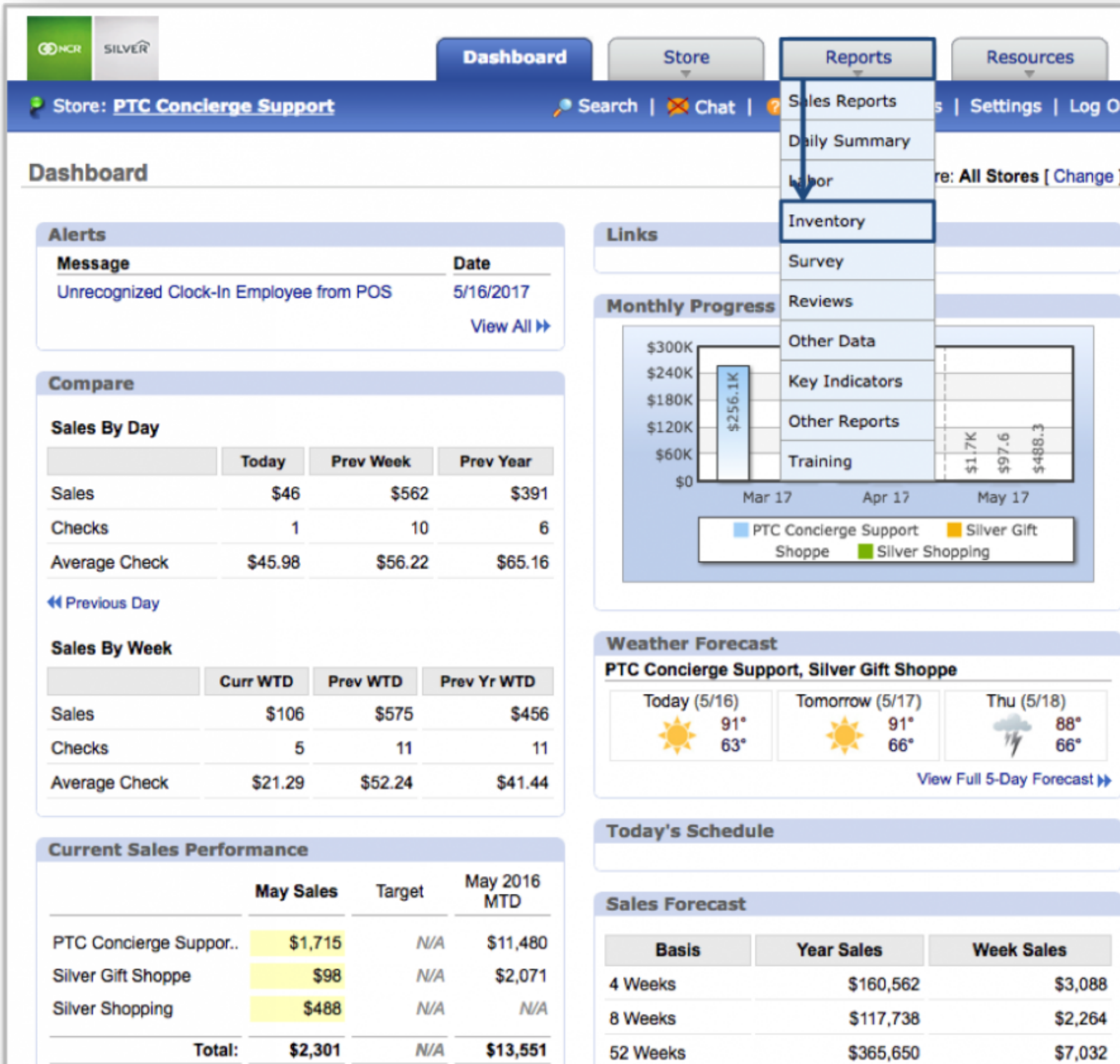
- **Add Inventory:** Occurs when you receive an order.
- **Take Inventory:** When you take the inventory of what you have *on hand* the day you take inventory (*which may include recent deliveries*).
- **On Hand:** A snapshot of what you currently have in inventory.
- **Theoretical On Hand:** Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items must be tied to the POS to determine *Theoretical On Hand* totals.
- **Auto Depletion:** When an item that correlates to a recipe is rung up on the POS, that item will auto-deplete from inventory to give you what you should *actually* have on hand. *Note: the item must be part of a recipe that is also tied to the POS.*
- **Actual Inventory:** Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory.
- **View History:** Provides you with historical data to show how Theoretical On Hand totals were calculated.
- **Cost of Goods (COGs):** The value of goods sold during a particular period of time.
- **Inventory Discrepancy:** Depicts actual vs. ideal inventory.

Inventory History

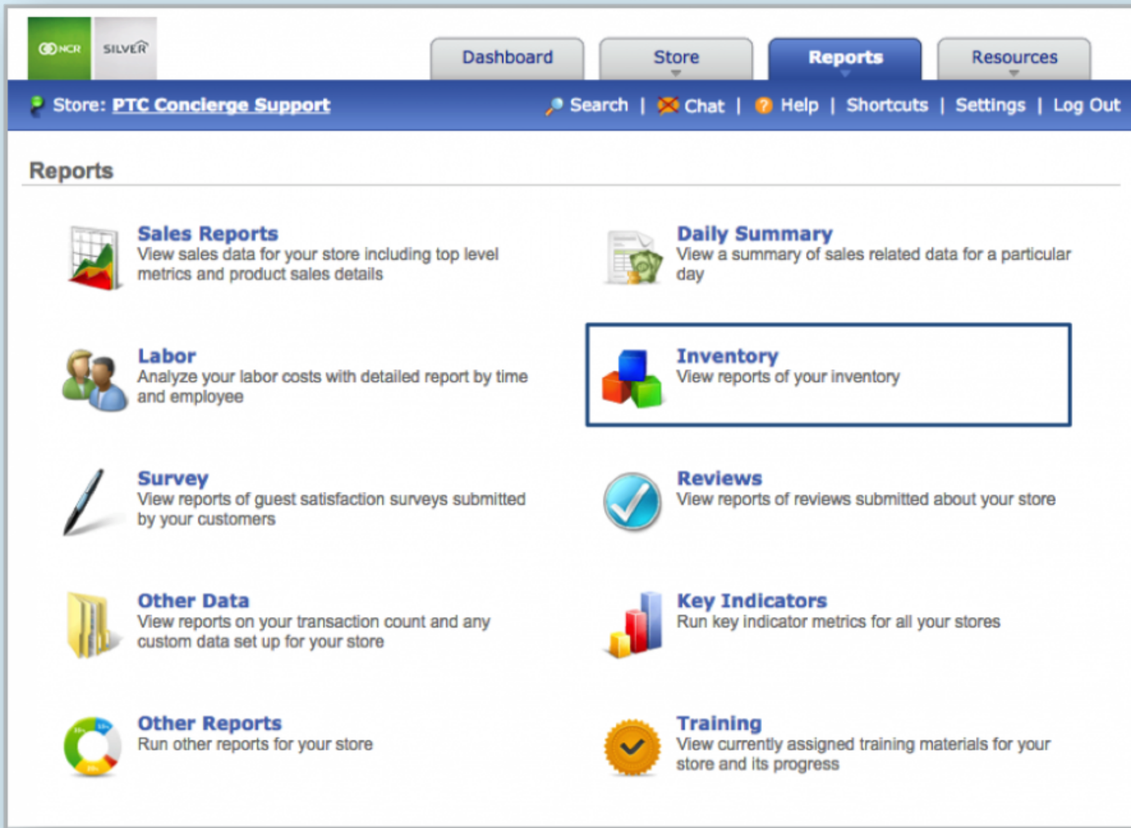
The purpose of this section is to showcase the *Inventory History Report* category.

Inventory History Report

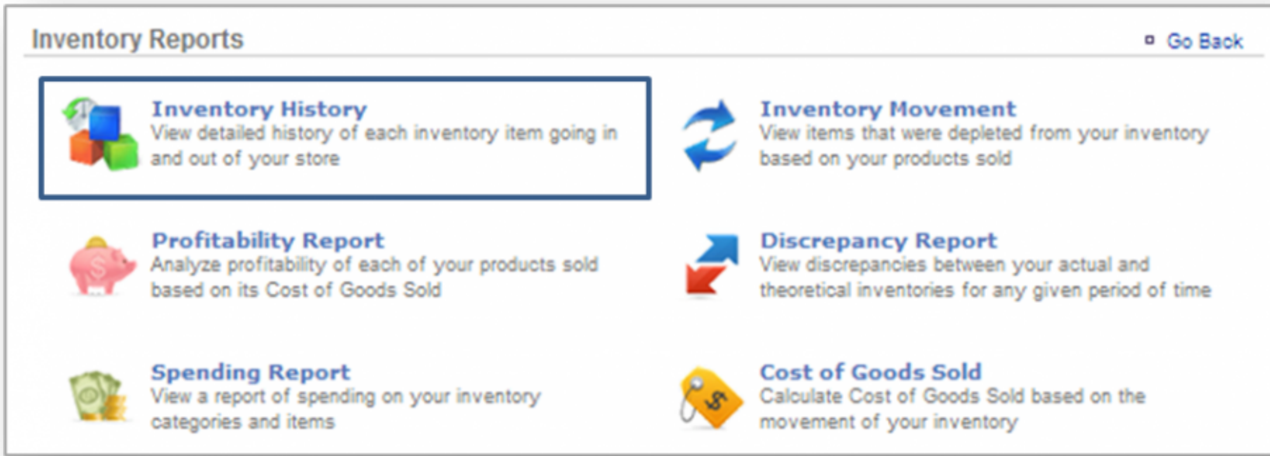
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Inventory***.



Hint: You can also access the Inventory by clicking on the ***Reports*** tab and then on ***Inventory***.



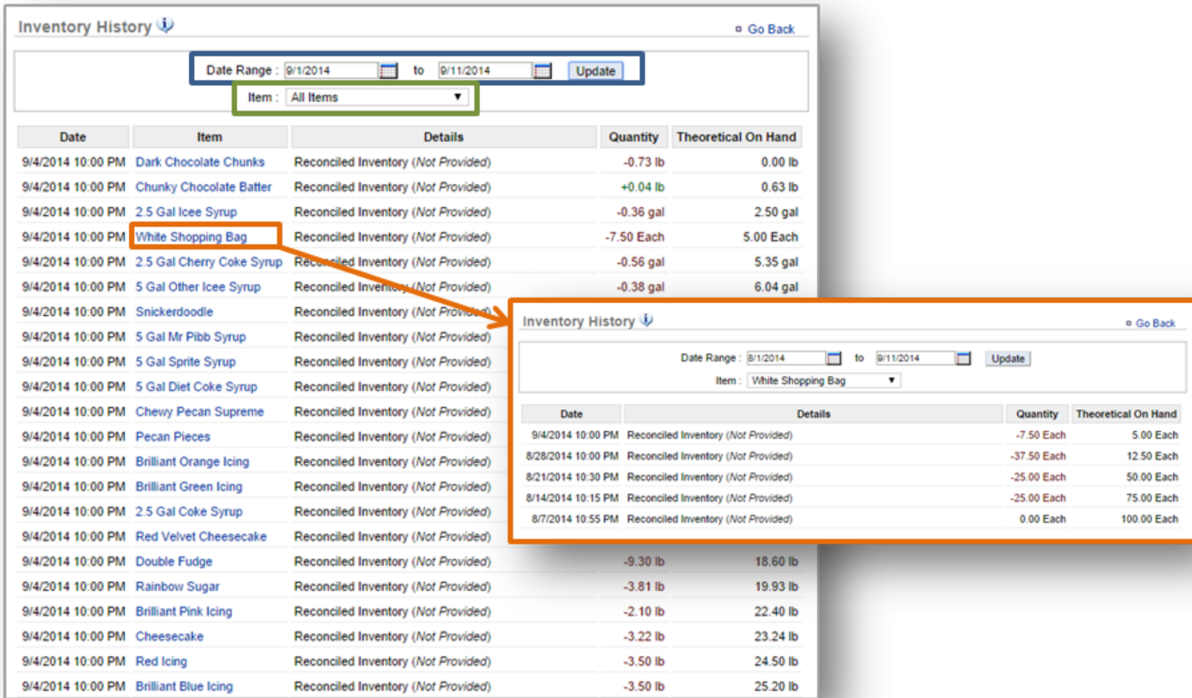
STEP 2: From the *Inventory Reports* screen, click ***Inventory History***.



STEP 3: The *Inventory History Report* will provide you with inventory data for the date range you set. When viewing this report, you will have the option to:

- **Select a date range.** Enter your preferred date range at the top of the page and click ***Update***.
- **View all items or a single item.** Click the drop down arrow to the right of *Items* and select ***All Items***, or a single item from the inventory list that appears. You can also view information for a single item by

clicking on that item within the table.



Hint: Quantity shown reflects adjustments made to specific inventory items for the date reflected to the left of the inventory item name. The ***Details*** column will show the reason for the adjustment (if one is provided) and the ***Theoretical on Hand*** column shows what you should have on hand based on the adjustments made.

Related Topics

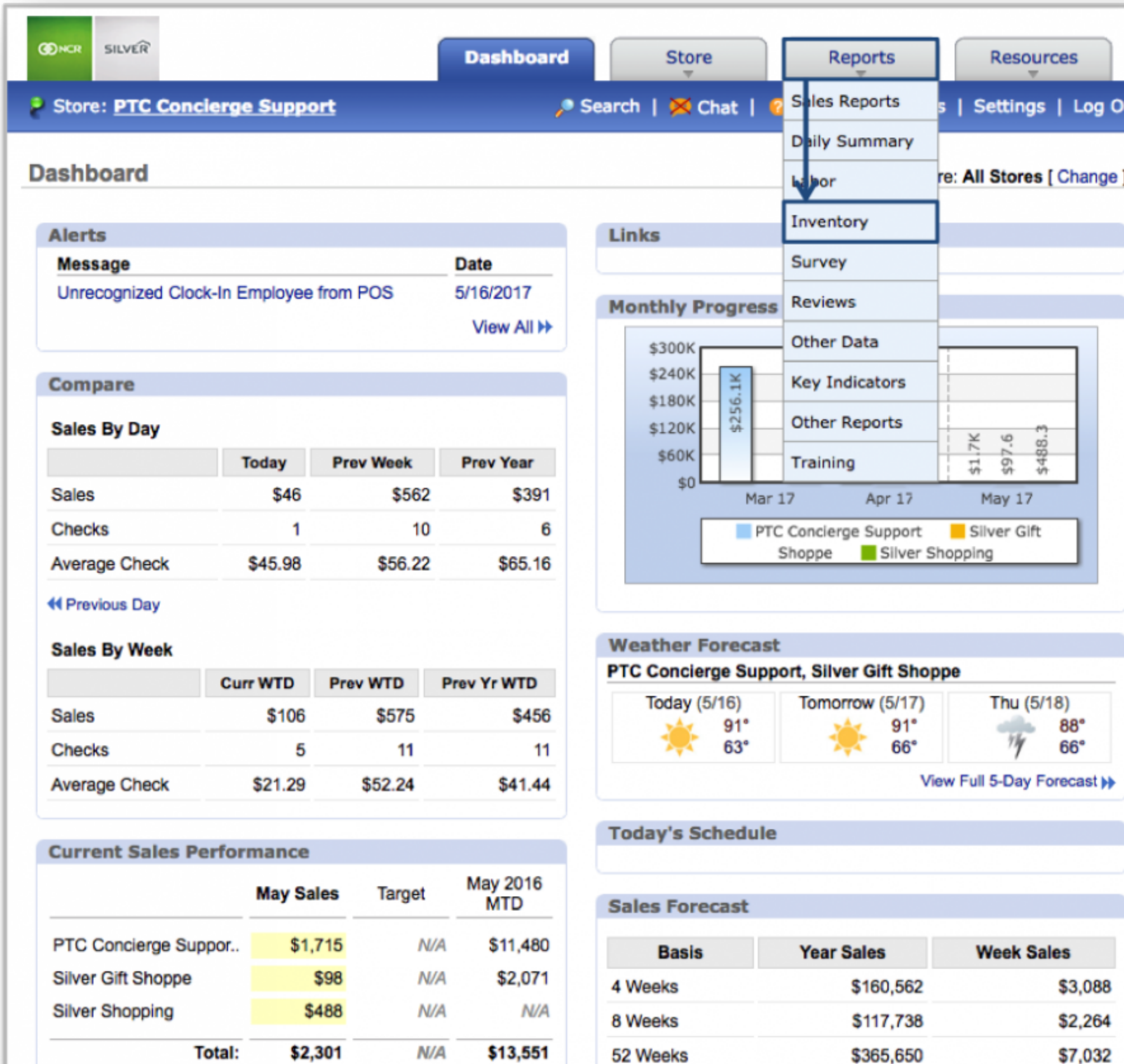
[Profitability Report]
[Spending Report]
[Inventory Movement]
[Discrepancy Report]
[Cost of Goods Sold]

Spending Report

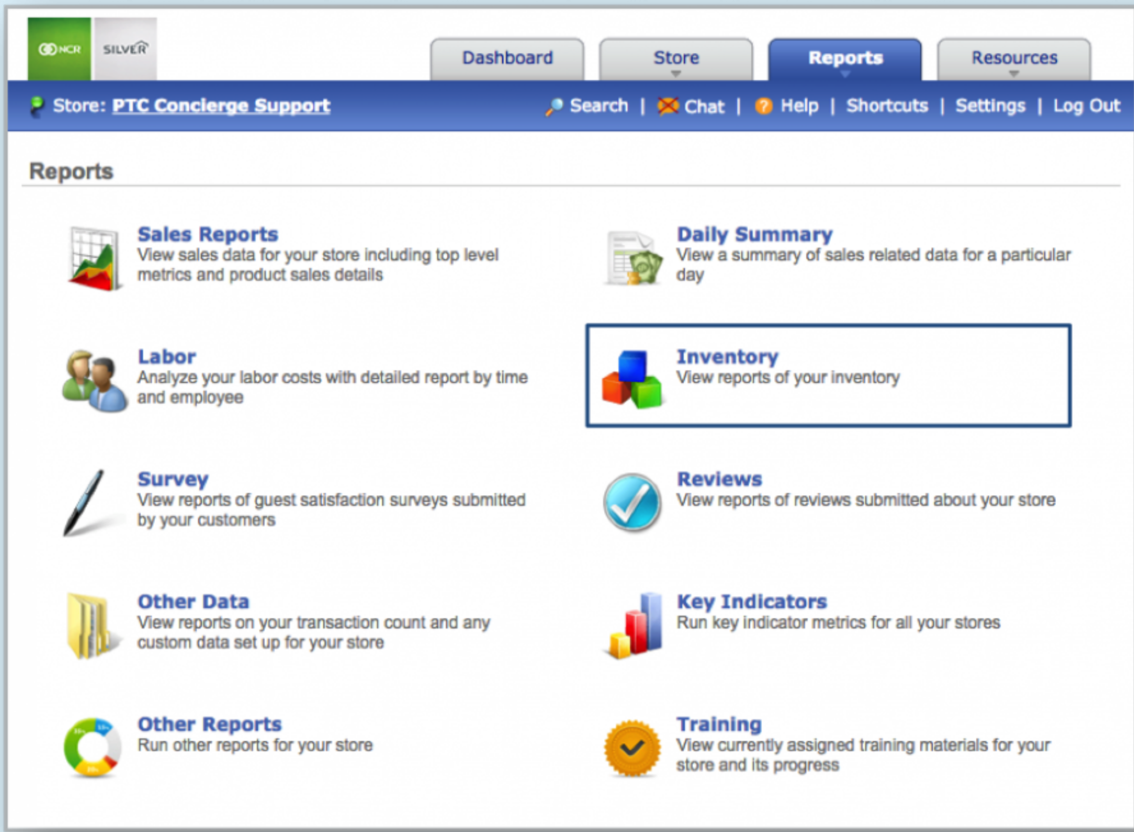
The purpose of this section is to showcase the *Spending Report* category.

Spending Report

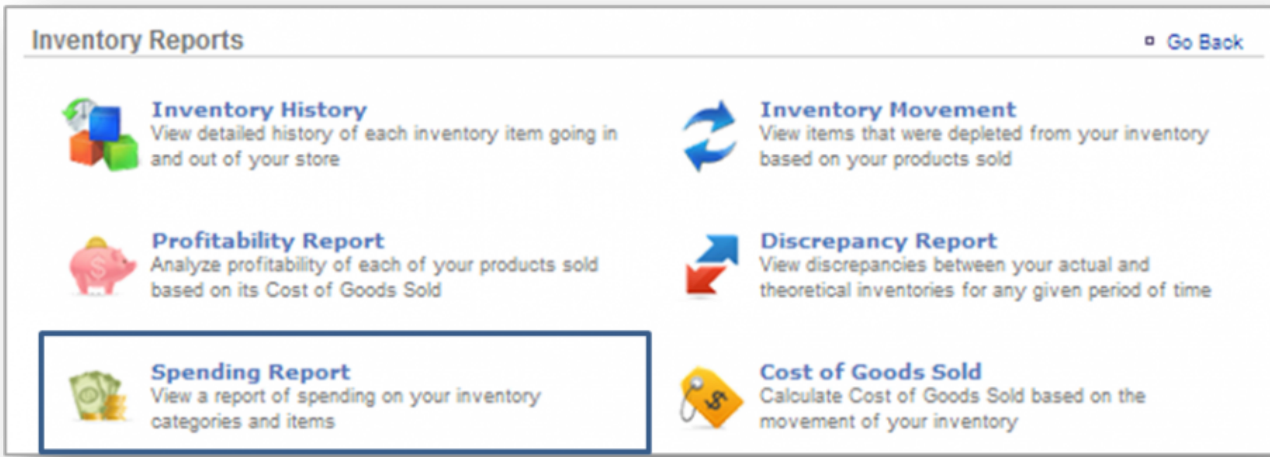
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Inventory***.



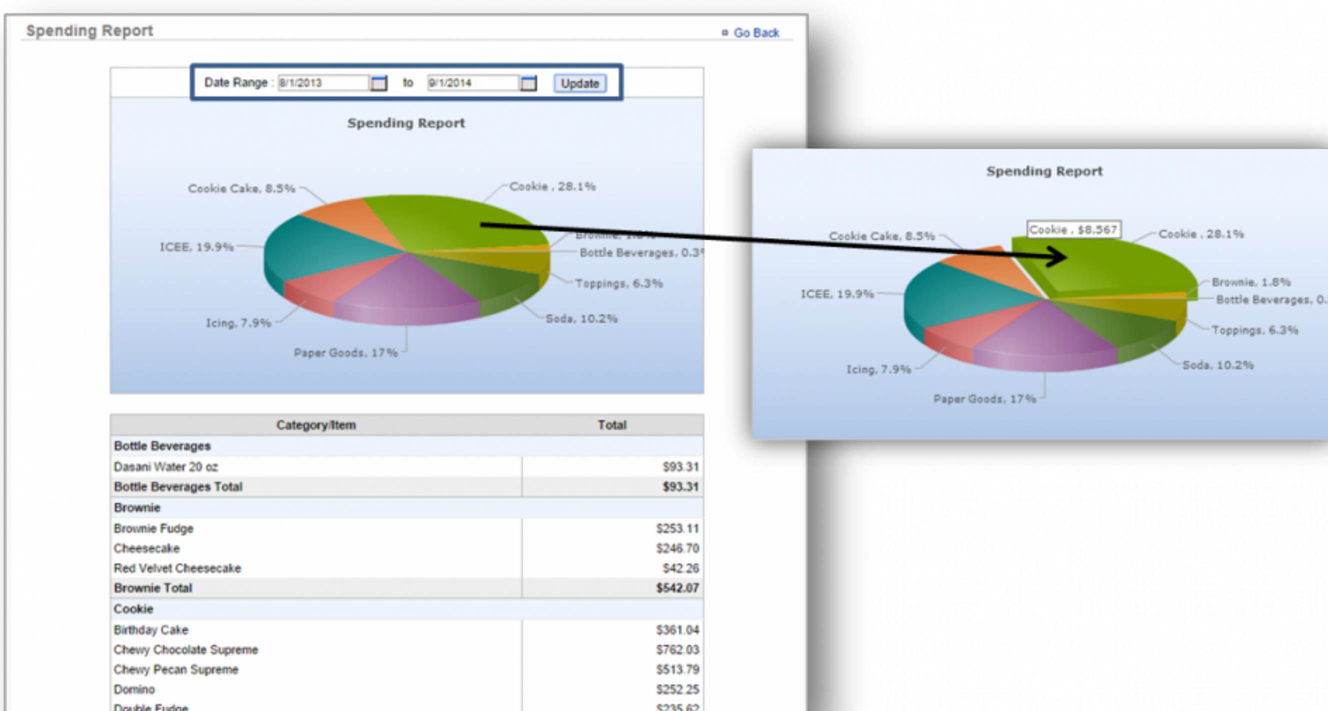
✻ ***Hint:*** *You can also access the Inventory by clicking on the* ***Reports*** *tab and then on* ***Inventory****.*



STEP 2: From the *Inventory Reports* screen, click ***Spending Report***.



STEP 3: The *Spending Report* will provide you with the total spent on inventory items for the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***. Keep in mind that totals shown do *not* include the taking or depletion of inventory. This report only reflects the total amount of money spent on inventory, within a specified date range.



Hint: Click on any area of the pie chart to see a category total.

Related Topics

[Inventory History]

[Profitability Report]

[Inventory Movement]

[Discrepancy Report]

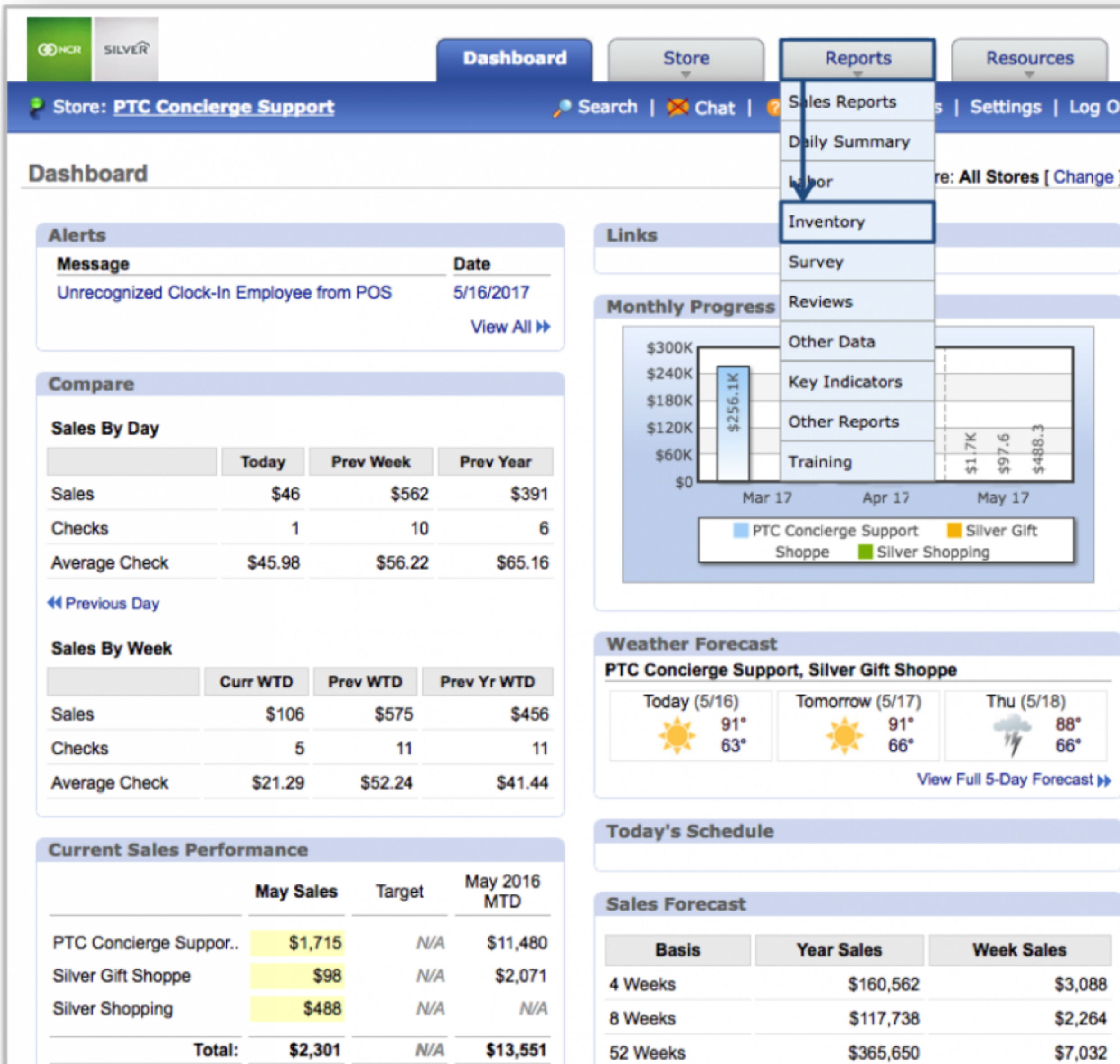
[Cost of Goods Sold]

Discrepancy Report

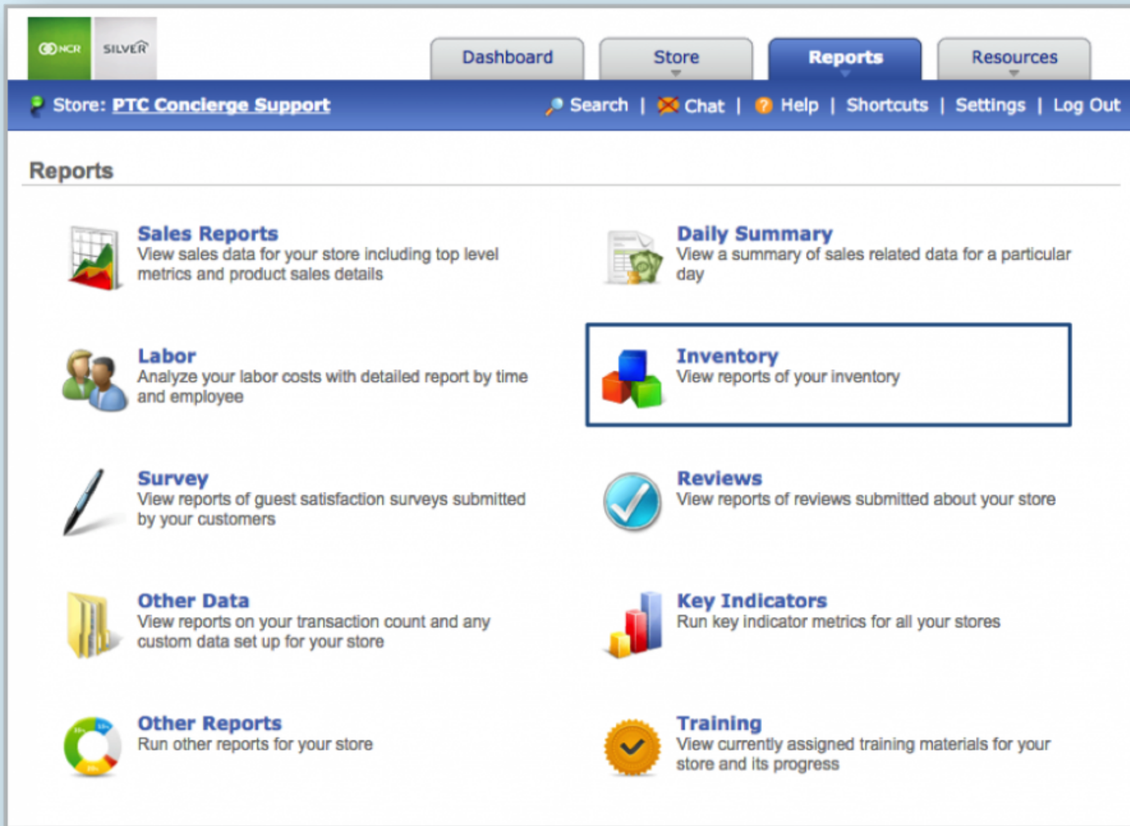
The purpose of this section is to showcase the *Discrepancy Report* category.

Discrepancy Report

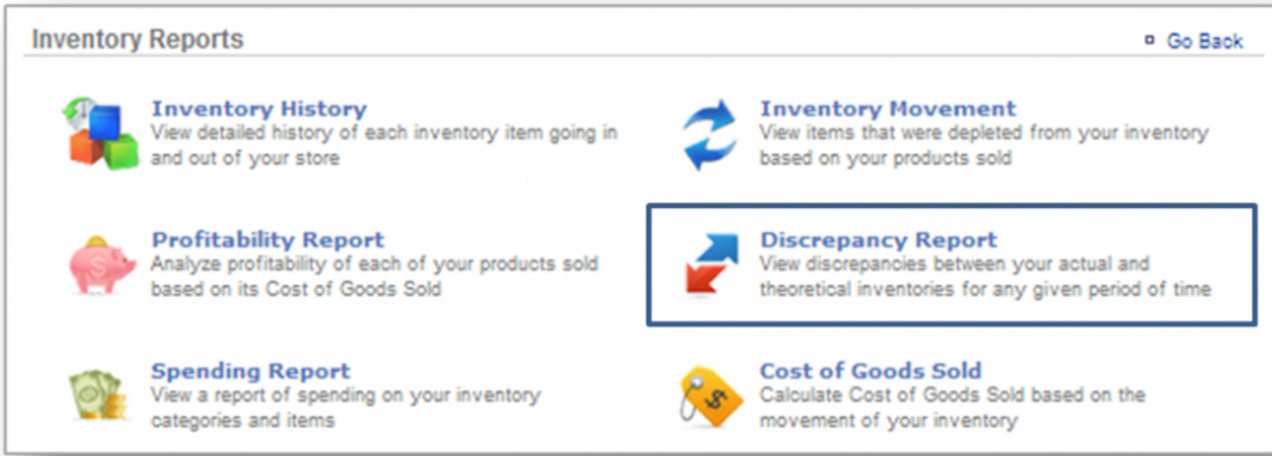
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Inventory***.



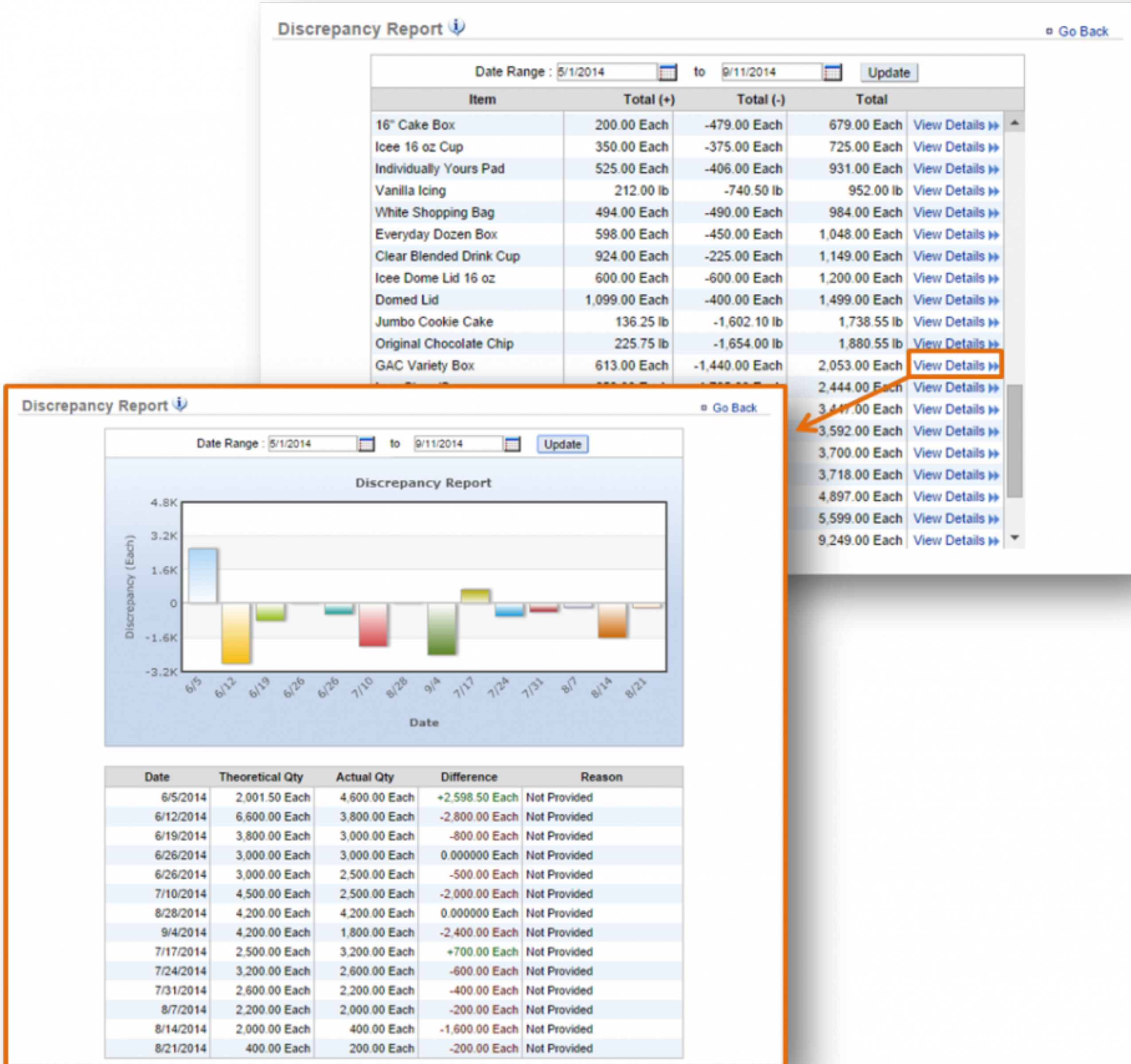
✻ ***Hint:*** You can also access the Inventory by clicking on the ***Reports*** tab and then on ***Inventory***.



STEP 2: From the *Inventory Reports* screen, click ***Discrepancy Report***.



STEP 3: The *Discrepancy Report* will highlight inventory discrepancies for the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***. Your inventory and any noted discrepancies will appear on screen. To view details for an item, click ***View Details*** to the right of the inventory total in the chart detail.



Details will reflect:

- The date an adjustment was made.
- Theoretical quantity (what you should have on hand based on POS rings and actual inventory).
- Actual quantity (what you have on hand based on the taking of inventory).
- Difference (the adjustment that was made; whether it was an addition or subtraction).
- Reason (the reason for the adjustment; you can elect not to include one).

Related Topics

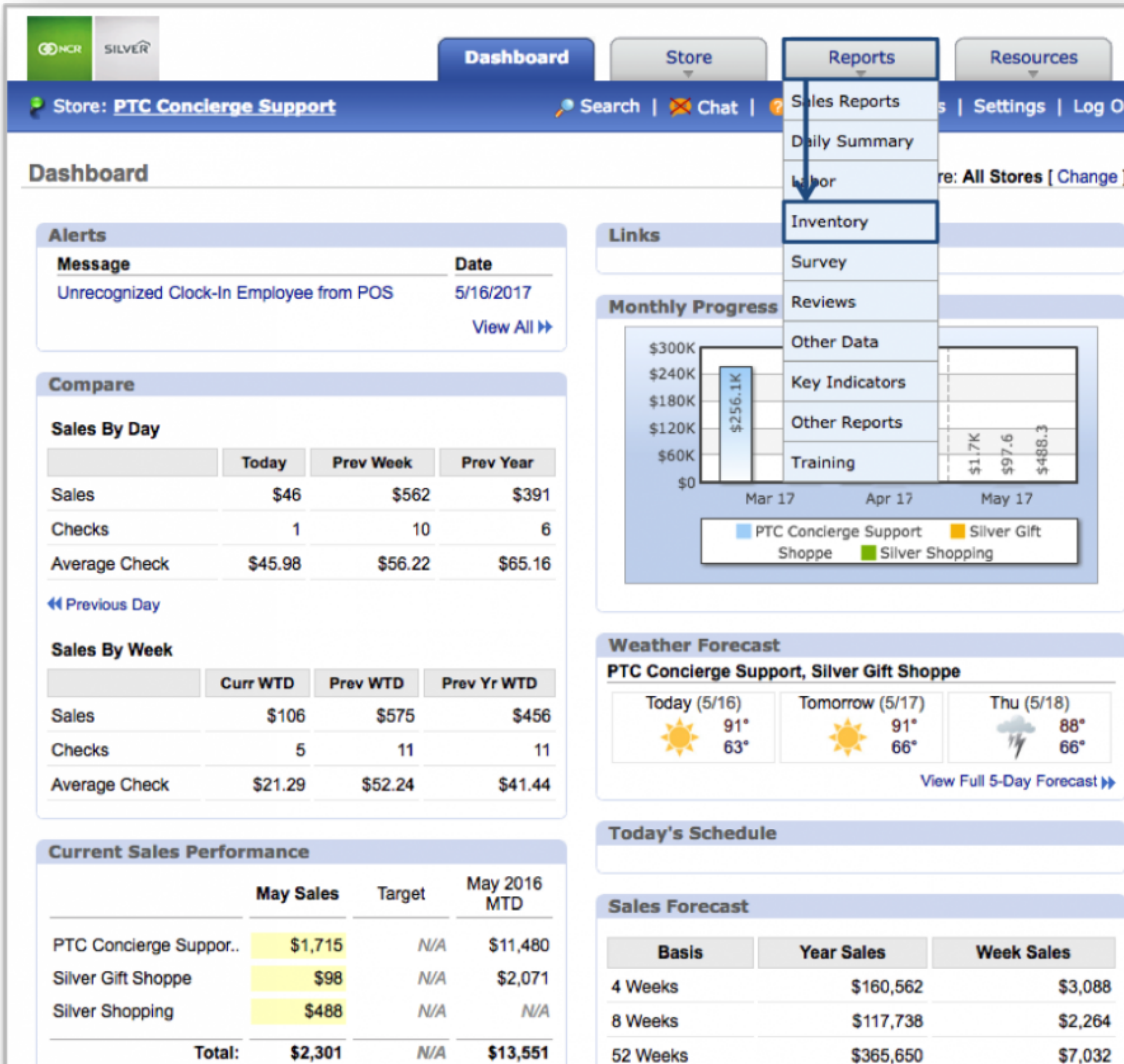
Inventory History
Profitability Report
Spending Report
Inventory Movement
Cost of Goods Sold

Cost of Goods Sold

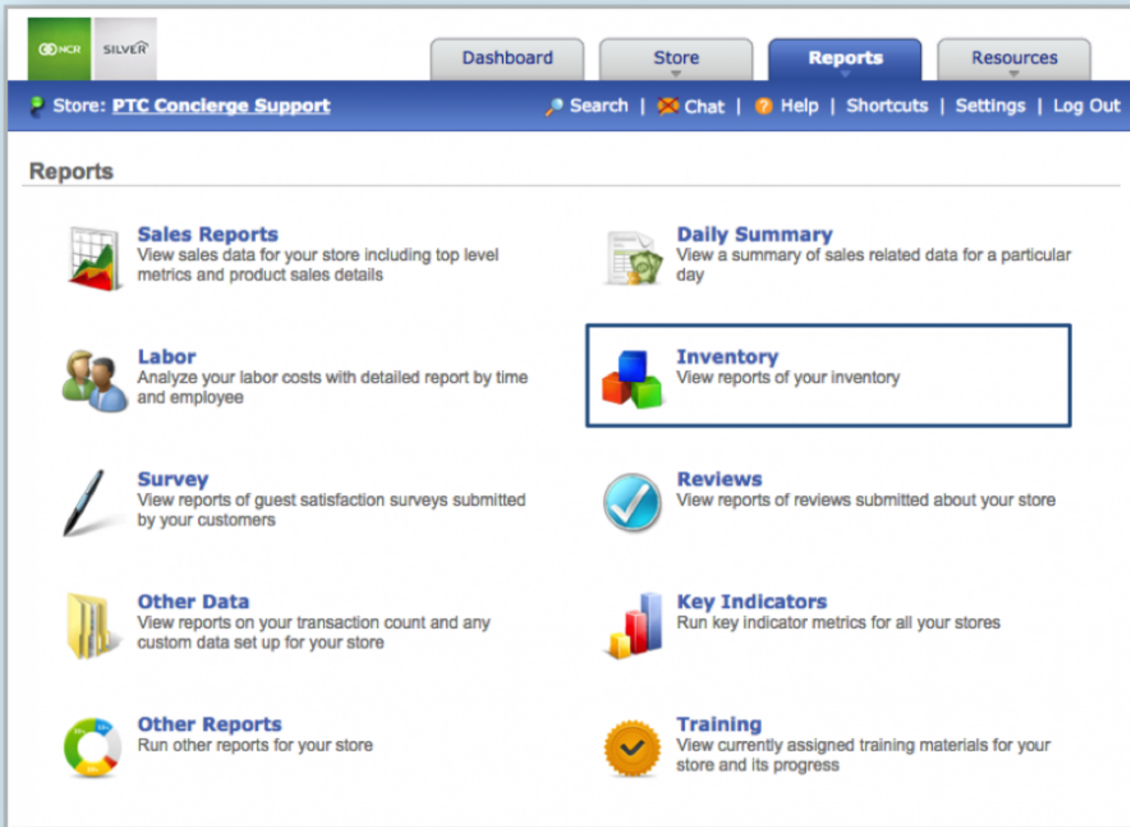
The purpose of this section is to showcase the *Cost of Goods Sold Report* category.

Cost of Goods Sold Report

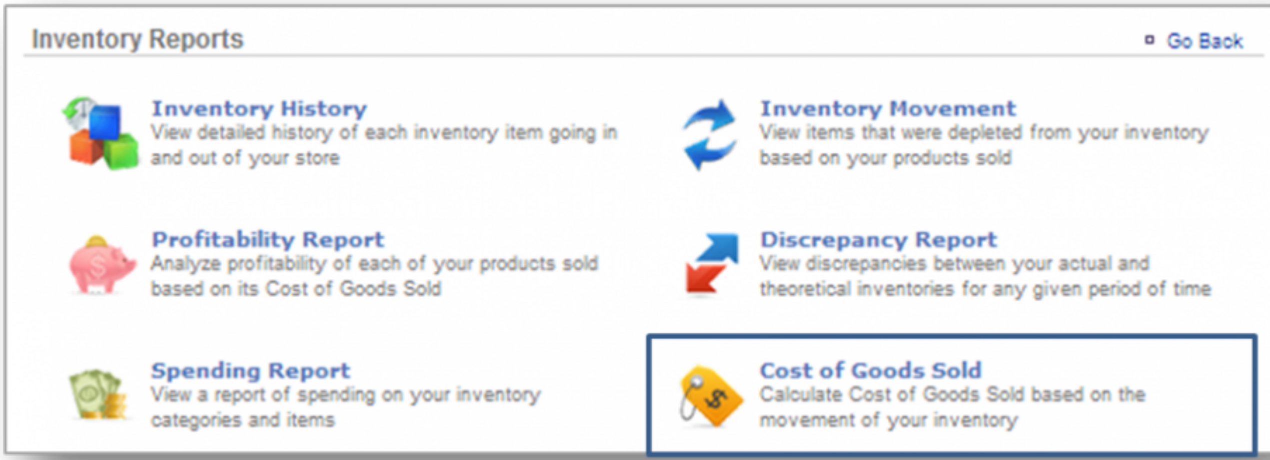
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Inventory***.



Hint: You can also access the Inventory by clicking on the ***Reports*** tab and then on ***Inventory***.



STEP 2: From the *Inventory Reports* screen, click ***Cost of Goods Sold***.



STEP 3: The *Cost of Goods Sold Report* will provide you with your total cost of goods sold for the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

Cost of Good Sold

Go Back | More Options

Date Range : 8/1/2014 to 9/1/2014 Update

Cookie

Inventory Item	Unit	Beginning	Received	Ending	Used	Used Cost	Cost to Sales	Cost to Cat Sales
Original Chocolate Chip	lb	314.10	576.00	367.20	522.90	$941.22	5.24%	9.31%
Oatmeal Walnut Raisin	lb	54.00	30.90	45.60	39.30	$65.95	0.37%	0.65%
Pecan	lb	64.80	30.90	56.40	39.30	$86.71	0.48%	0.86%
Double Fudge	lb	72.30	0.30	29.70	42.90	$68.07	0.38%	0.67%
White Chunk Macadamia	lb	69.00	210.60	196.80	82.80	$198.20	1.10%	1.96%
Peanut Butter Supreme	lb	132.60	120.30	143.40	124.20	$233.25	1.30%	2.31%
Sugar	lb	90.60	300.00	219.00	171.60	$243.16	1.35%	2.41%
Chewy Chocolate Supreme	lb	40.80	90.00	58.20	72.60	$210.27	1.17%	2.08%
Chewy Pecan Supreme	lb	30.60	60.00	30.00	60.60	$153.98	0.86%	1.52%
Snickerdoodle	lb	42.90	30.00	16.80	56.10	$97.18	0.54%	0.96%
Domino	lb	41.40	30.00	54.30	17.10	$29.22	0.16%	0.29%
Birthday Cake	lb	40.80	60.60	60.00	41.40	$80.88	0.45%	0.80%
Chunky Chocolate Batter	lb	0.00	0	0.59	0.10	$0.20	0.00%	0.00%
					Total	$2,408.29	13.42%	23.82%

Cookie Cake

Inventory Item	Unit	Beginning	Received	Ending	Used	Used Cost	Cost to Sales	Cost to Cat Sales
Jumbo Cookie Cake	lb	305.40	450.00	229.50	525.90	$905.76	5.05%	15.87%
					Total	$905.76	5.05%	15.87%

Cost %: **35.14%**
Total Cost: **$6,307.06**
Net Sales: **$17,946.37**

Your report will be grouped by category and will reflect:

- Each inventory item name.
- The unit of measurement for each item.
- Beginning Inventory (your beginning inventory for the date range you set).
- Received Inventory (inventory received for the date range you set).
- Ending Inventory (your ending inventory as of the date range you set).
- Used Inventory (the amount of inventory used over the course of the date range you set).
- Used Cost (the cost of each inventory item multiplied by the amount that was used).
- Cost to Sales (the percentage of inventory items against total sales for the date range you set).

- Cost to Category Sales (the percentage of inventory items against total *category* sales for the date range you set).

> ✻ **Note:** Total cost of goods percentage (against total sales) for the date range you set will appear at the bottom right corner of this report, along with total cost of goods and total net sales. You can export this report by clicking ***More Options*** at the right top corner of the page and then ***Export Report***.

Related Topics

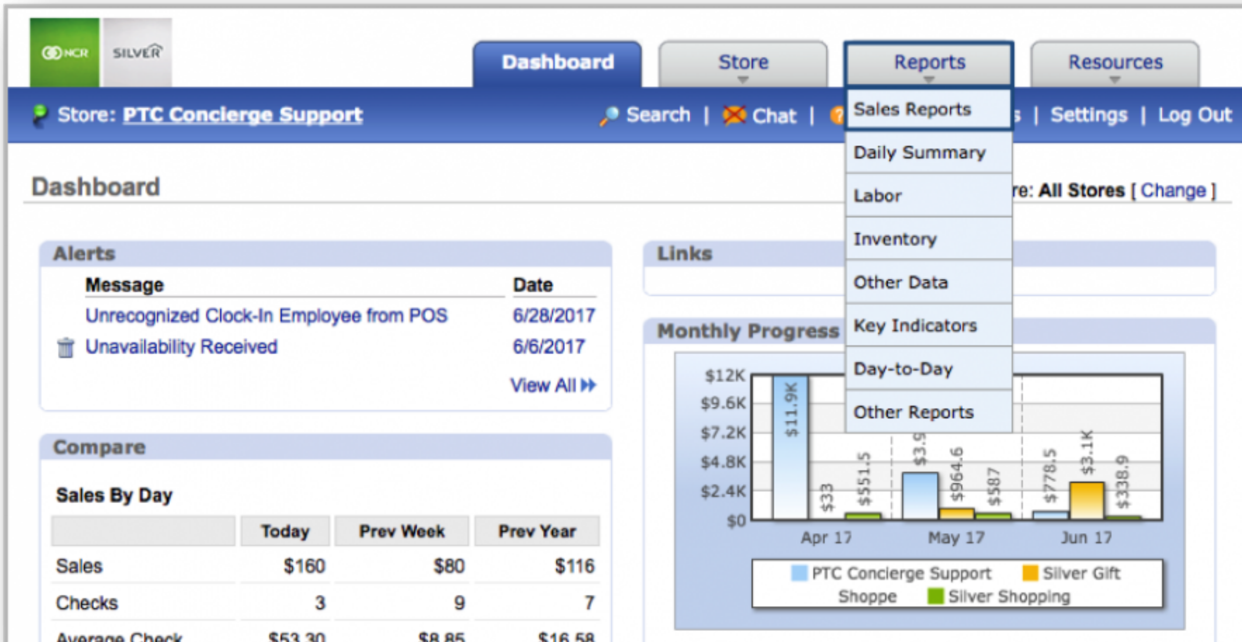
[Inventory History]
[Profitability Report]
[Spending Report]
[Inventory Movement]
[Discrepancy Report]

Product Mix Reports

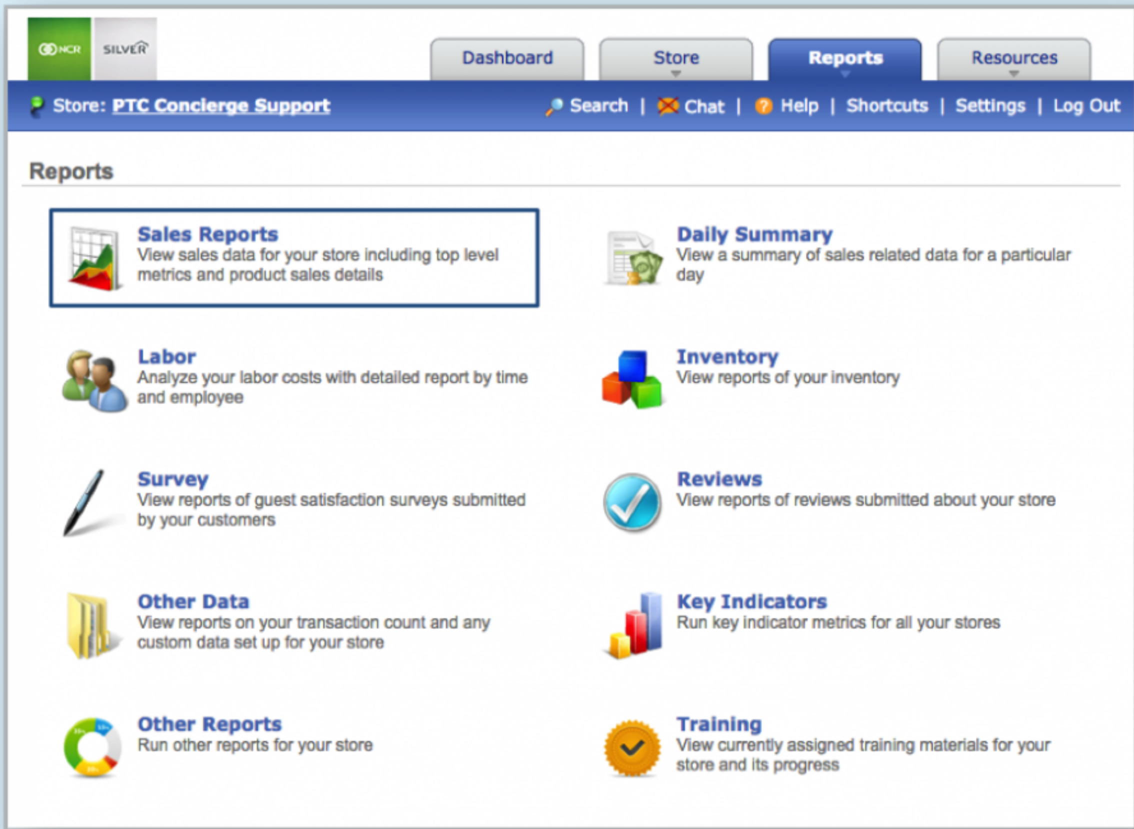
The purpose of this section is to illustrate how to generate, and view a *Product Mix Report*.

Product Mix Report

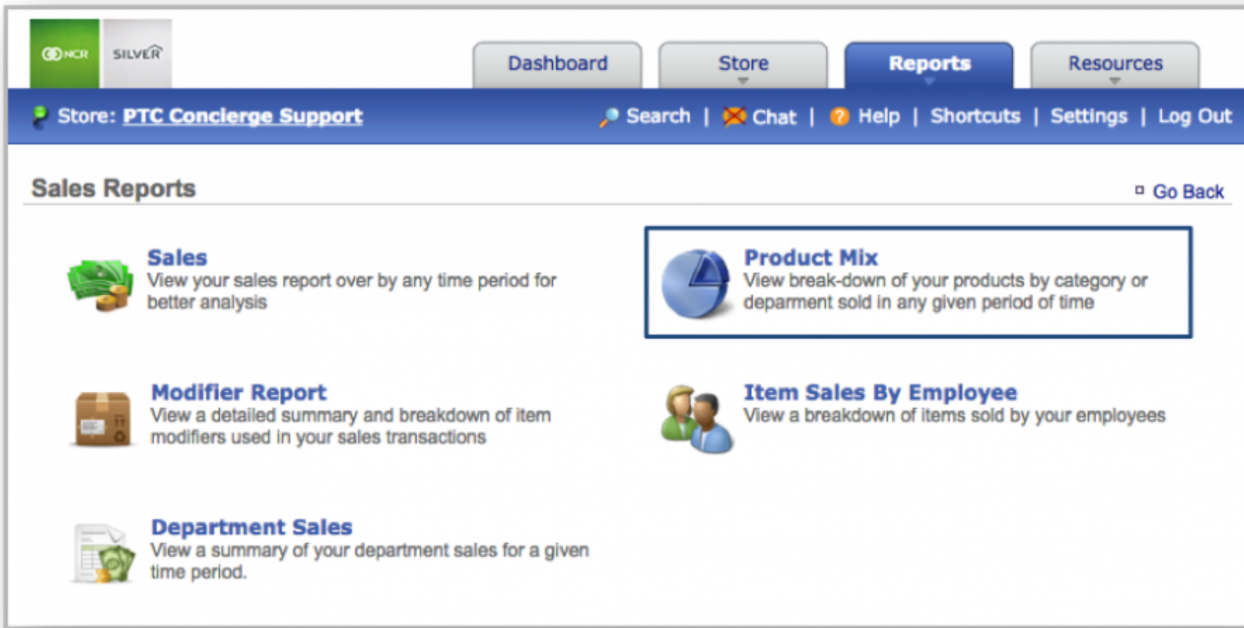
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Sales Reports***.



✻ ***Hint:*** *You can also access Sales Reports by clicking on the* ***Reports*** *tab and then on* ***Sales Reports****.*



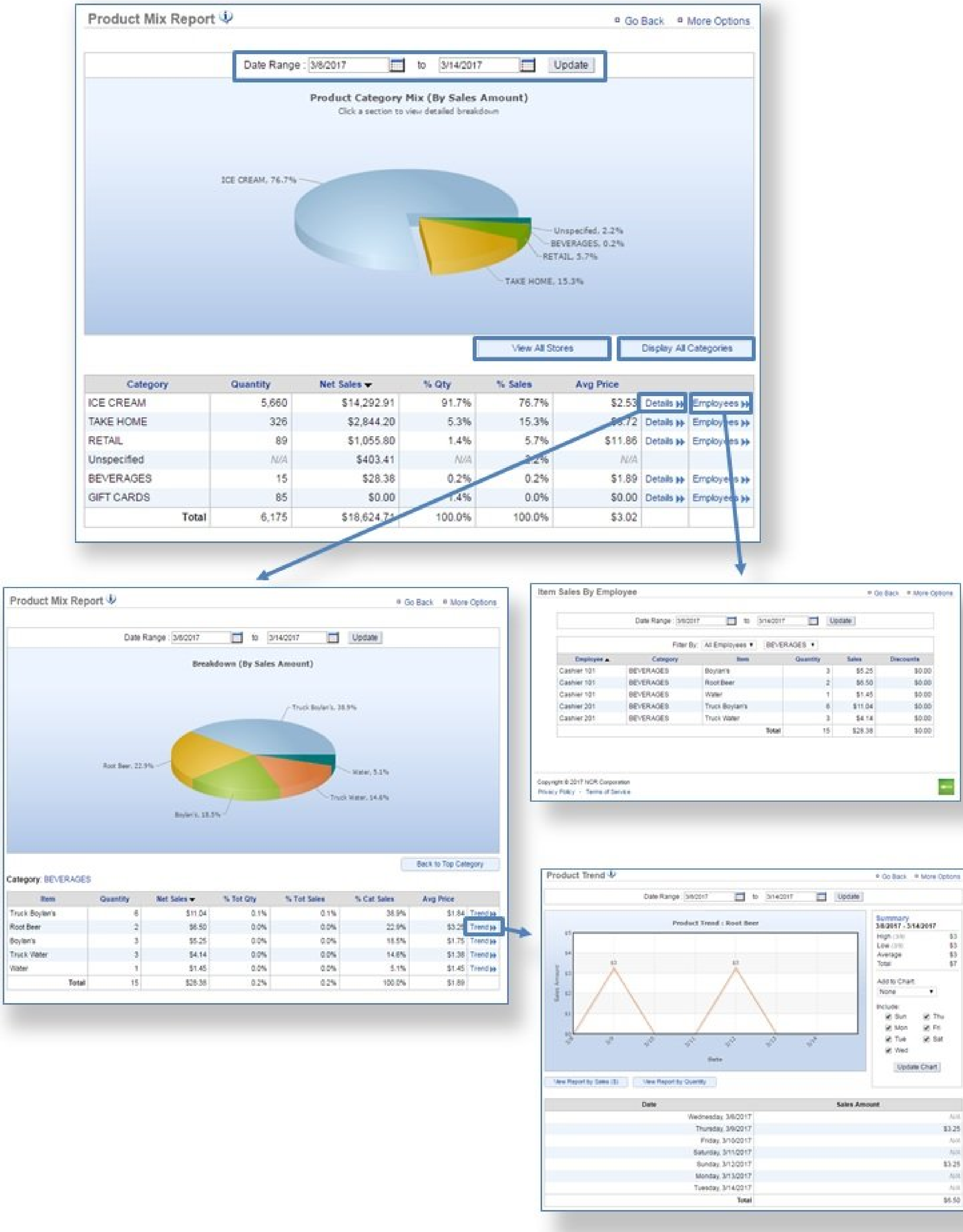
STEP 2: From the Sales Reports screen, click ***Product Mix***.



STEP 3: The *Product Mix Report* will provide you with sales information related to product for the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- Click ***Details*** at the bottom right of the chart details section to view sales information for items within a specified category. Within this view, click ***Trend*** to the right of any category item to see the purchasing trend for the date range you set. See **STEP 3** for more detailed information.

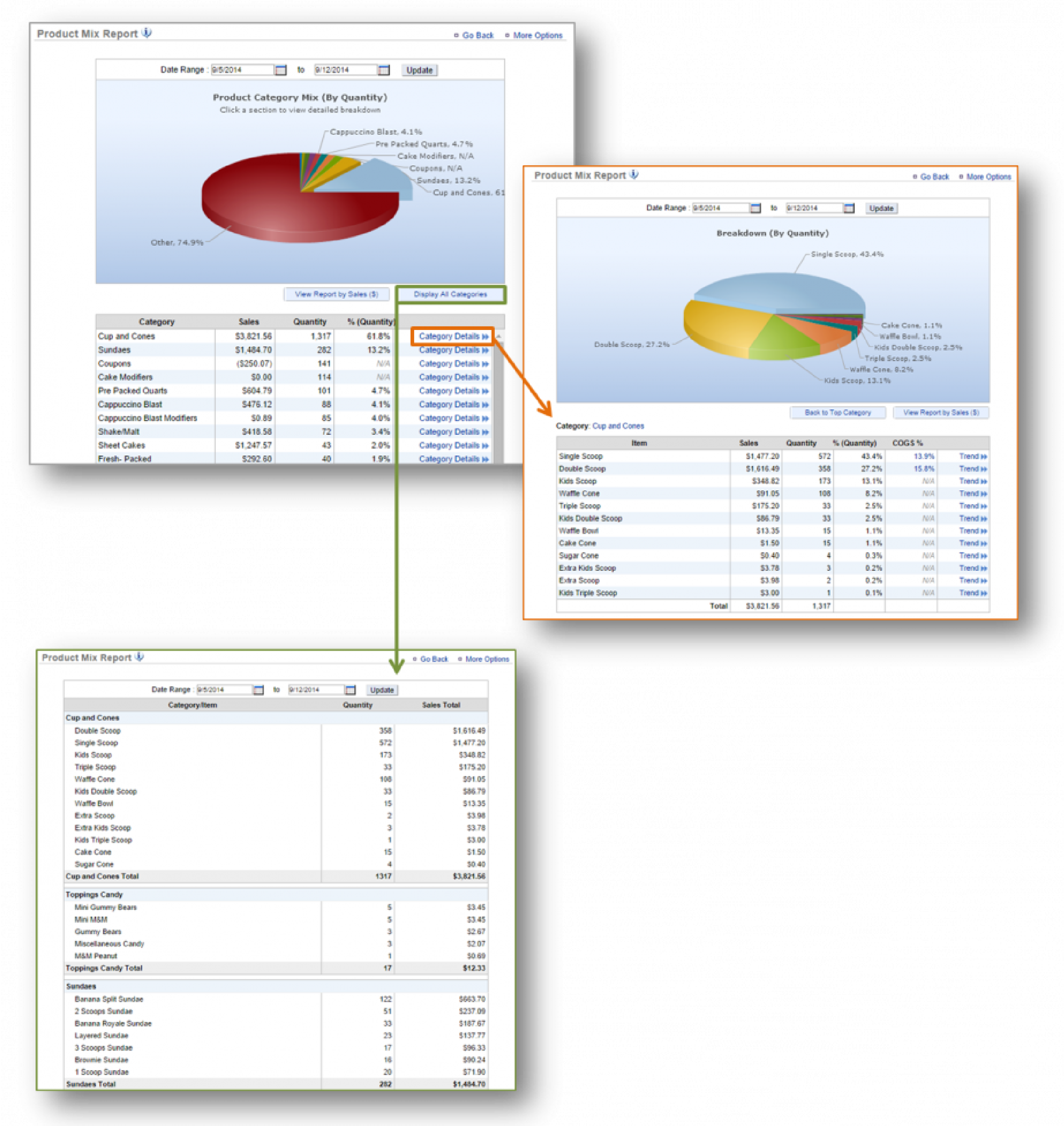
- Click ***Employees***, to view your item sales for that category by your employees.



STEP 4: To view your product mix report by quantity of items sold, click ***View Report by Quantity***.

- Click ***Category Details*** at the bottom right of the chart details section to view sales information by quantity for items within a specified category.
- Click ***Display All Categories*** at the bottom right of your chart to view product mix detail as a list. This report will show quantity and sales for all categories and items pertaining to each category within the

date range you set.



✱ **Note:** If you are looking at product mix by *category*, the quantity shown will be for the entire category. If you are looking at a product mix report for individual items, the quantity shown will be for the specified item only.

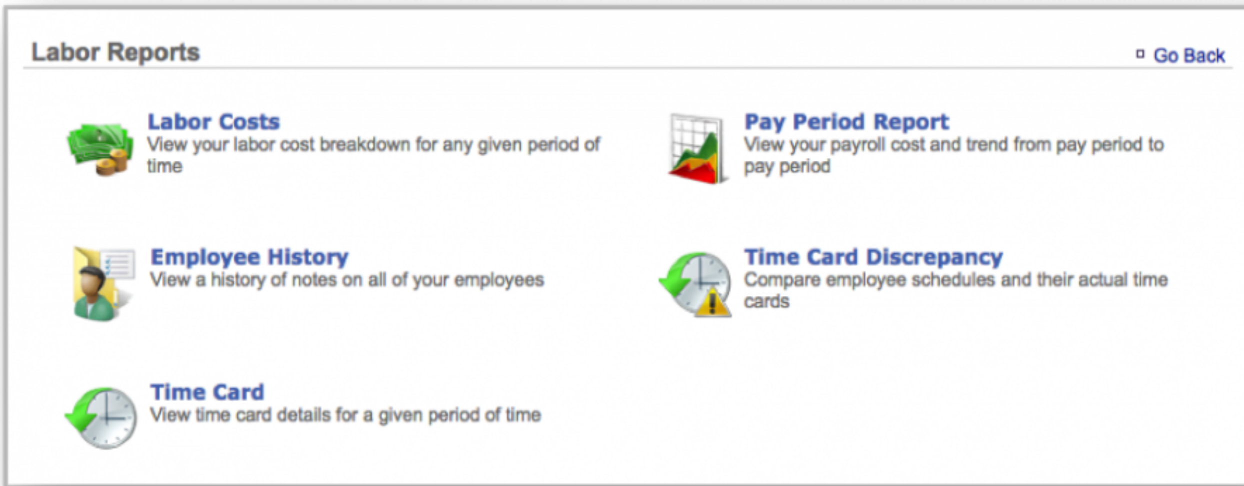
> **Did you know?** You can export any *Product Mix* report by clicking ***More Options*** at the top right corner of the page and then, ***Export Report***.

Related Topics

Sales Reports
Inventory Reports
Labor Reports
Training Reports
Survey Reports

Labor Reports

The purpose of this section is to illustrate how to generate, and view, various *Labor Reports*.



For more detailed information, click on a topic below.

[Labor Costs Report]
[Pay Period Report]
[Employee History Report]
[Time Card Discrepancy Report]

Additional Related Topics

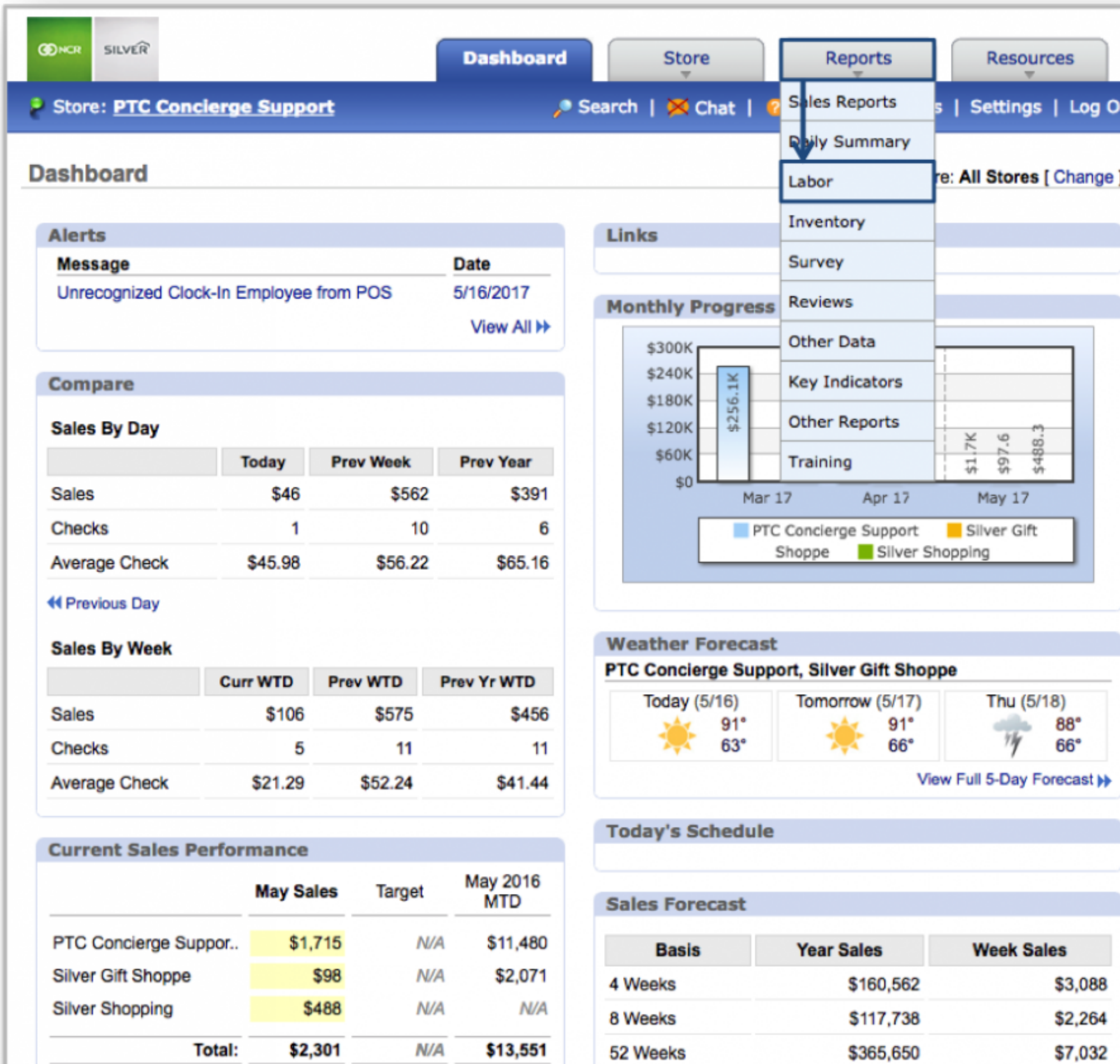
Sales Reports
Inventory Reports
Product Mix Reports
Training Reports
Survey Reports

Labor Costs Report

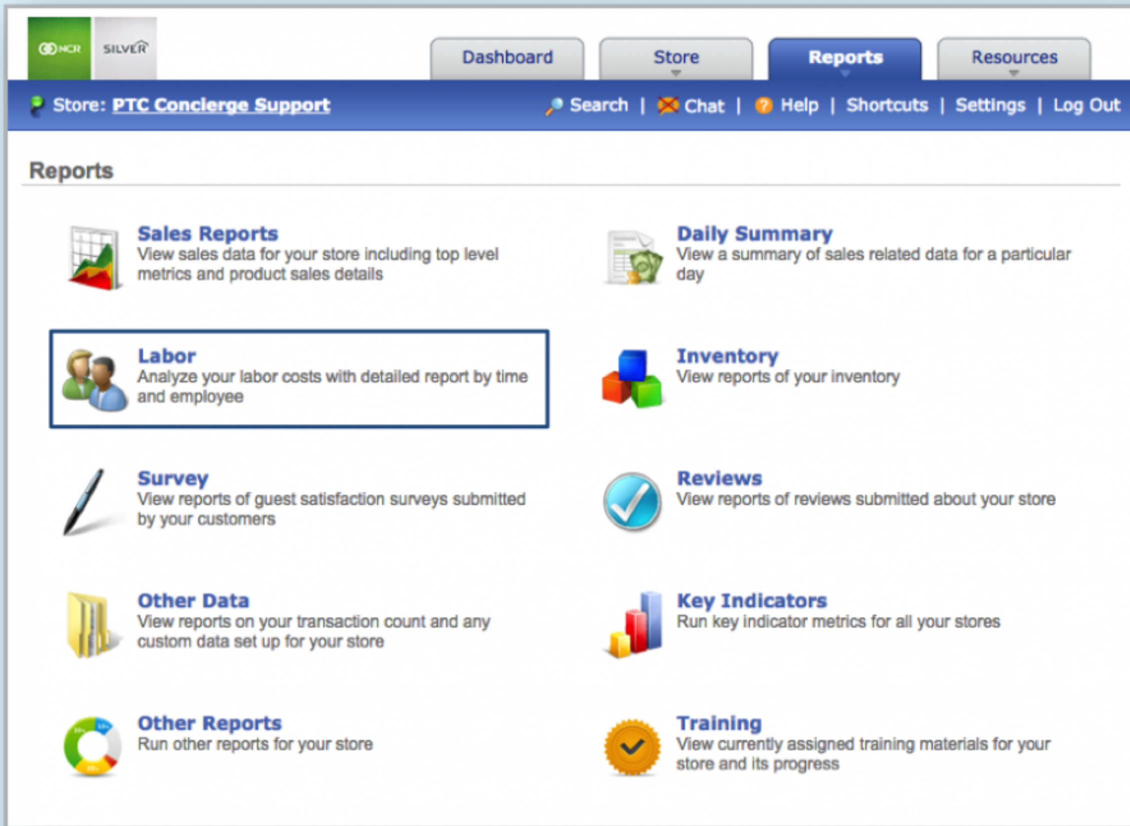
The purpose of this section is to illustrate how to generate a *Labor Costs Report*.

Generate a Labor Costs Report

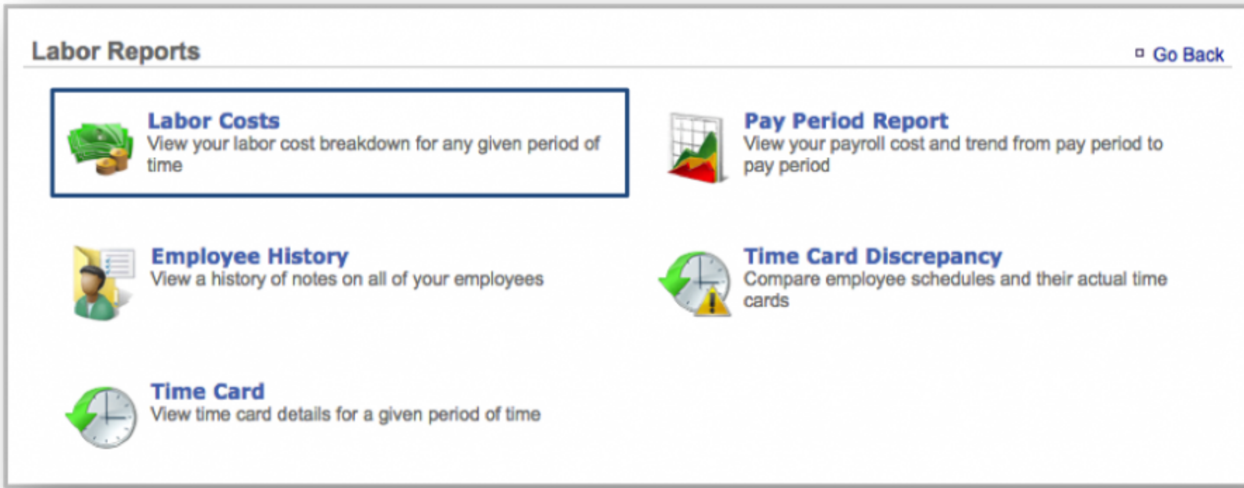
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Labor***.



✻ ***Hint:*** *You can also access the* Labor *reports by clicking on the* ***Reports*** *tab and then on* ***Labor****.*

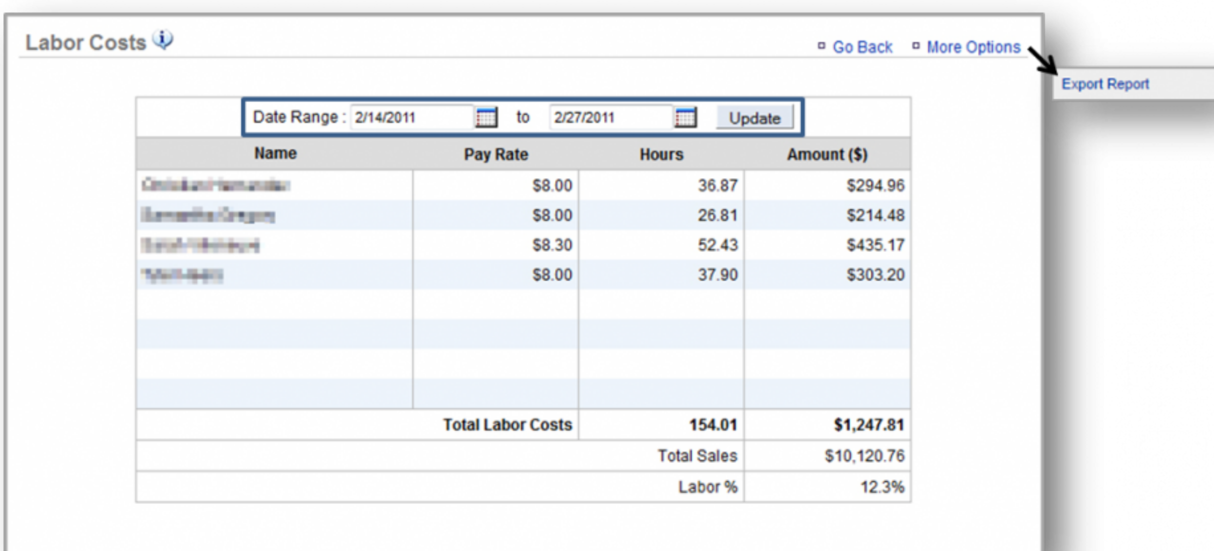


STEP 2: From the *Labor Reports* screen, click ***Labor Costs***.



STEP 3: This report will show the hours and corresponding pay for each of your employees within the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- Keep in mind that you must have already entered a pay rate for each of your employees to generate pay totals. Your total labor costs (for the selected date range) along with net sales will generate your labor percentage, which will be shown at the bottom right corner of the screen.



! **Did you know?** You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export Report***.

Related Topics

Pay Period Report

Employee History Report

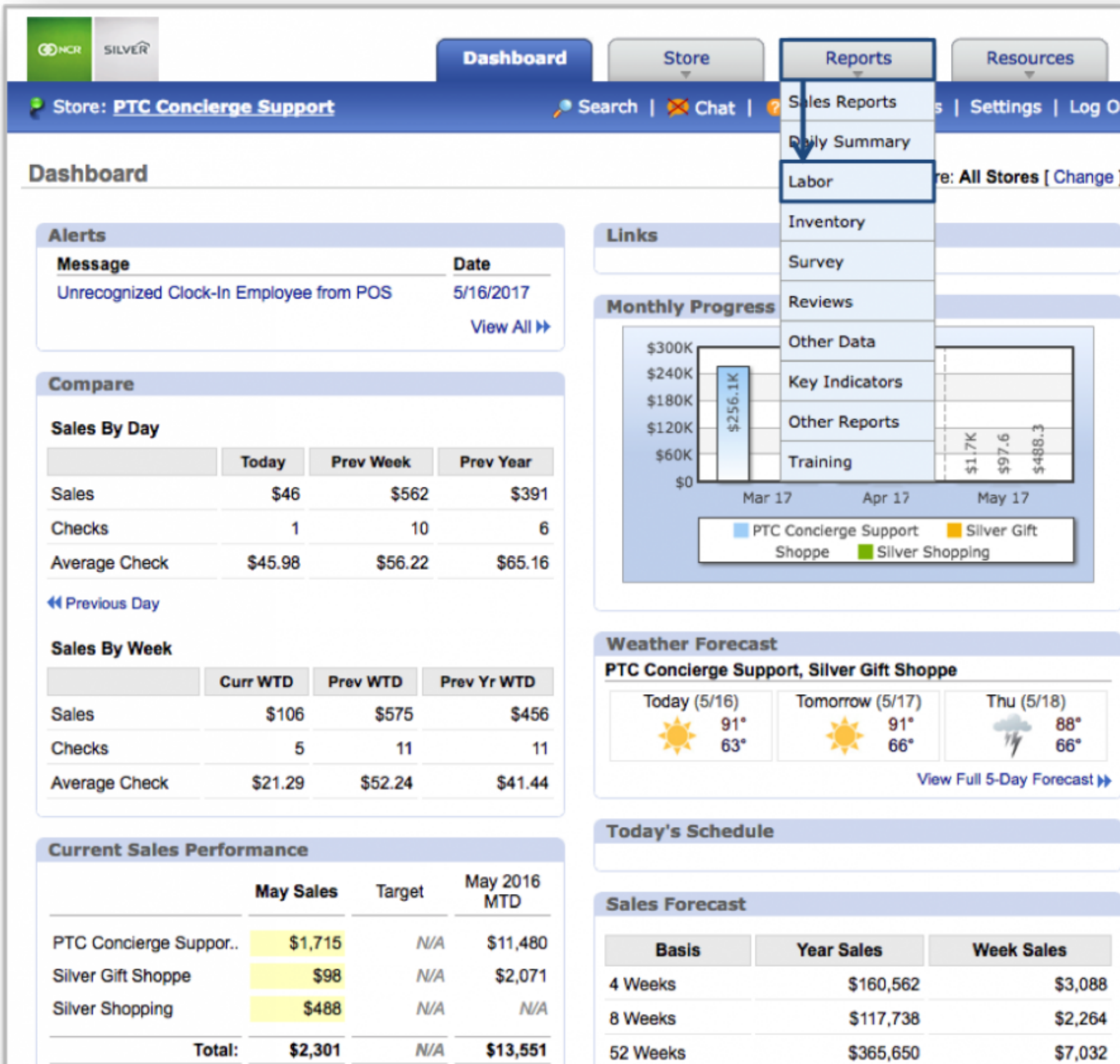
Time Card Discrepancy Report

Pay Period Report

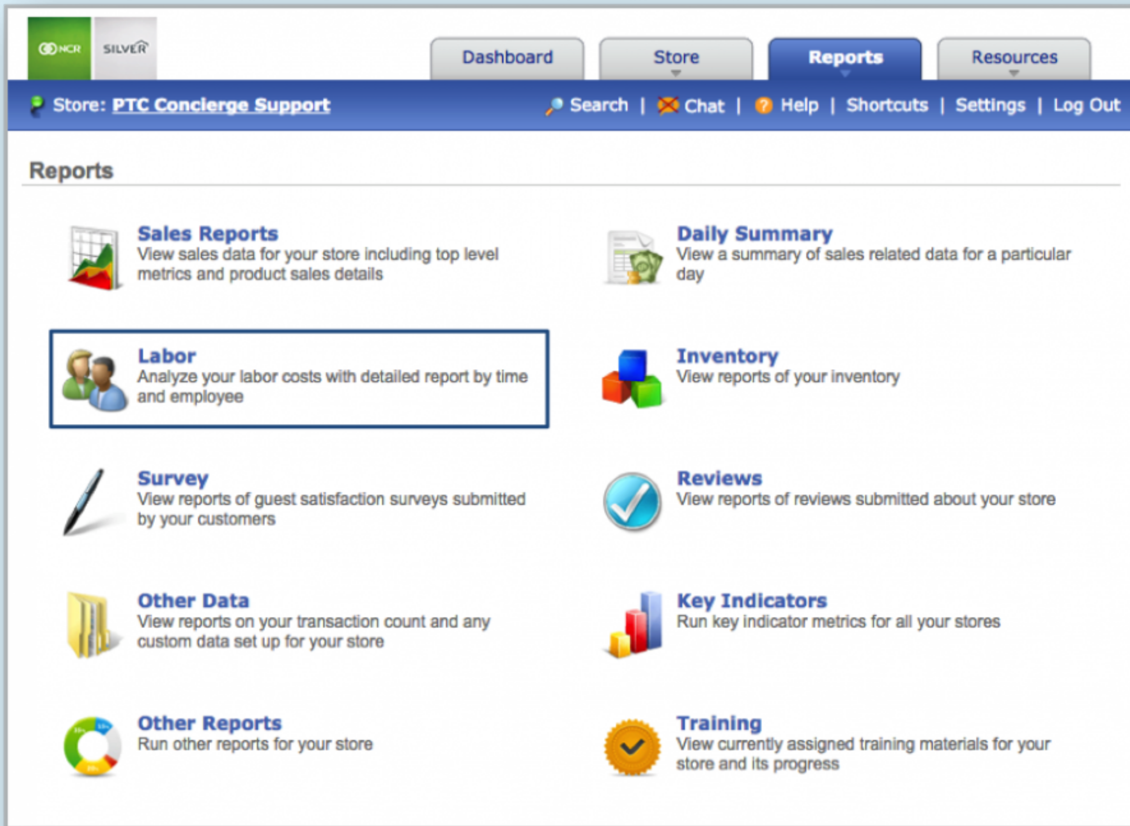
The purpose of this section is to illustrate how to generate a *Pay Period Report*.

Generate a Pay Period Report

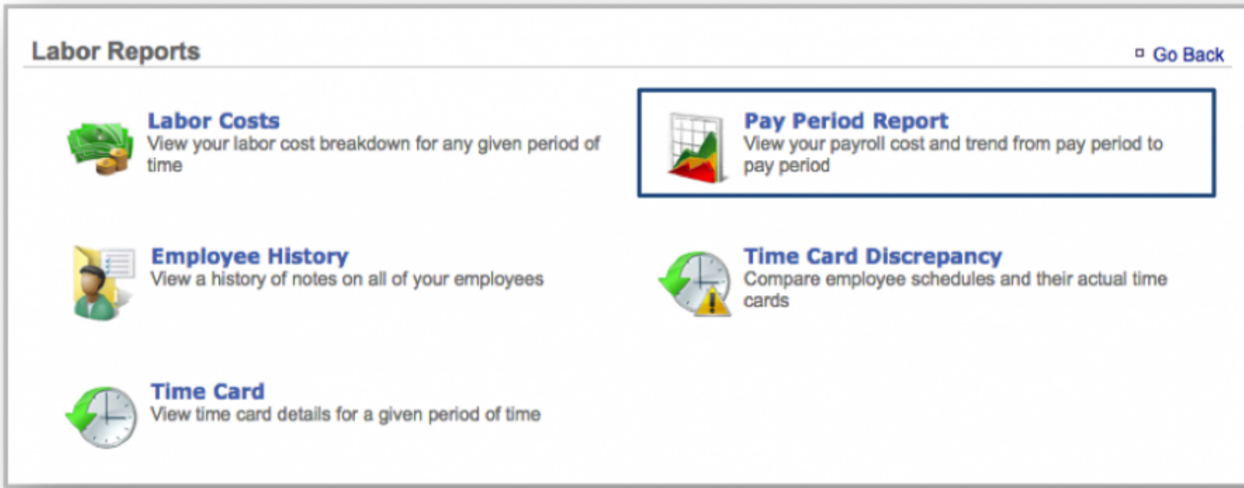
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Labor***.



Hint: You can also access the *Labor* reports by clicking on the ***Reports*** tab and then on ***Labor***.

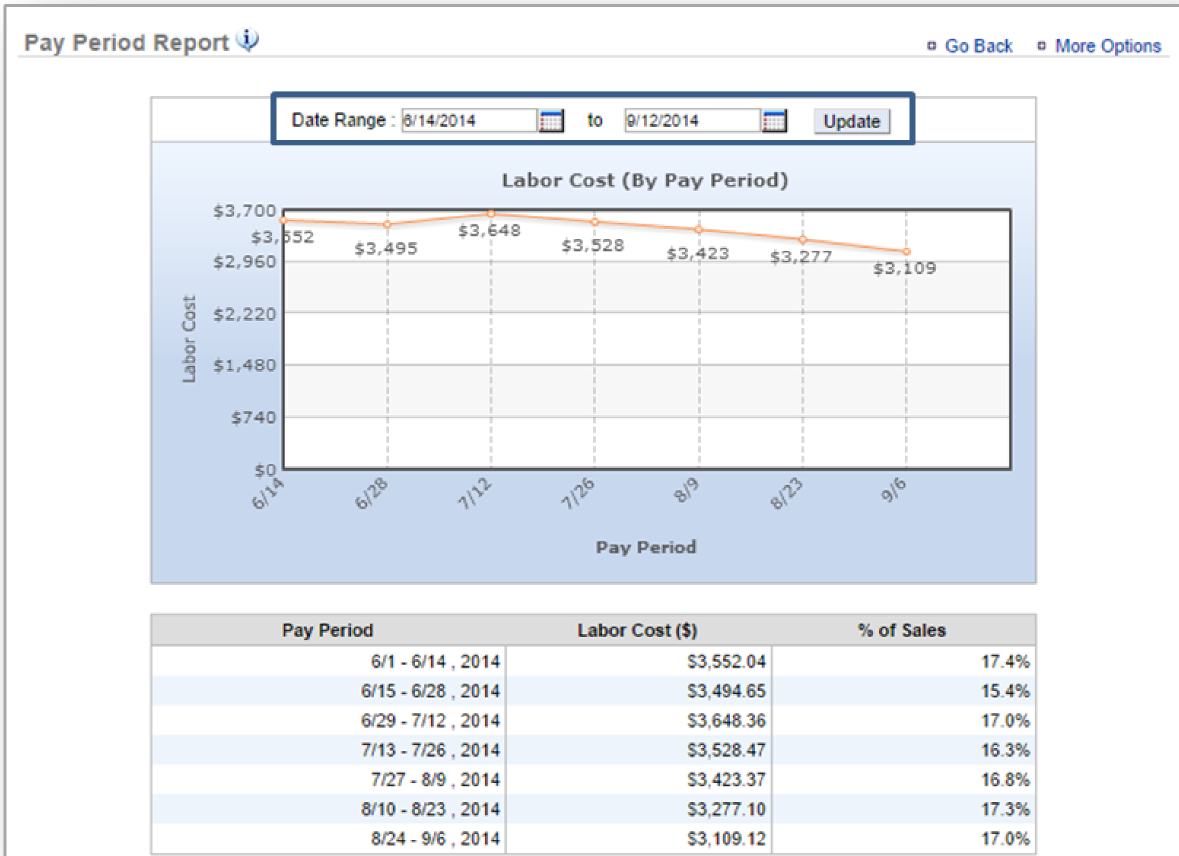


STEP 2: From the *Labor Reports* screen, click ***Pay Period Report***.



STEP 3: This report will show what you spent on labor for each pay period within the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- This report will also reflect your labor percentage against net sales.



Pay Period	Labor Cost ($)	% of Sales
6/1 - 6/14 , 2014	$3,552.04	17.4%
6/15 - 6/28 , 2014	$3,494.65	15.4%
6/29 - 7/12 , 2014	$3,648.36	17.0%
7/13 - 7/26 , 2014	$3,528.47	16.3%
7/27 - 8/9 , 2014	$3,423.37	16.8%
8/10 - 8/23 , 2014	$3,277.10	17.3%
8/24 - 9/6 , 2014	$3,109.12	17.0%

! **Did you know?** You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export Report***.

Related Topics

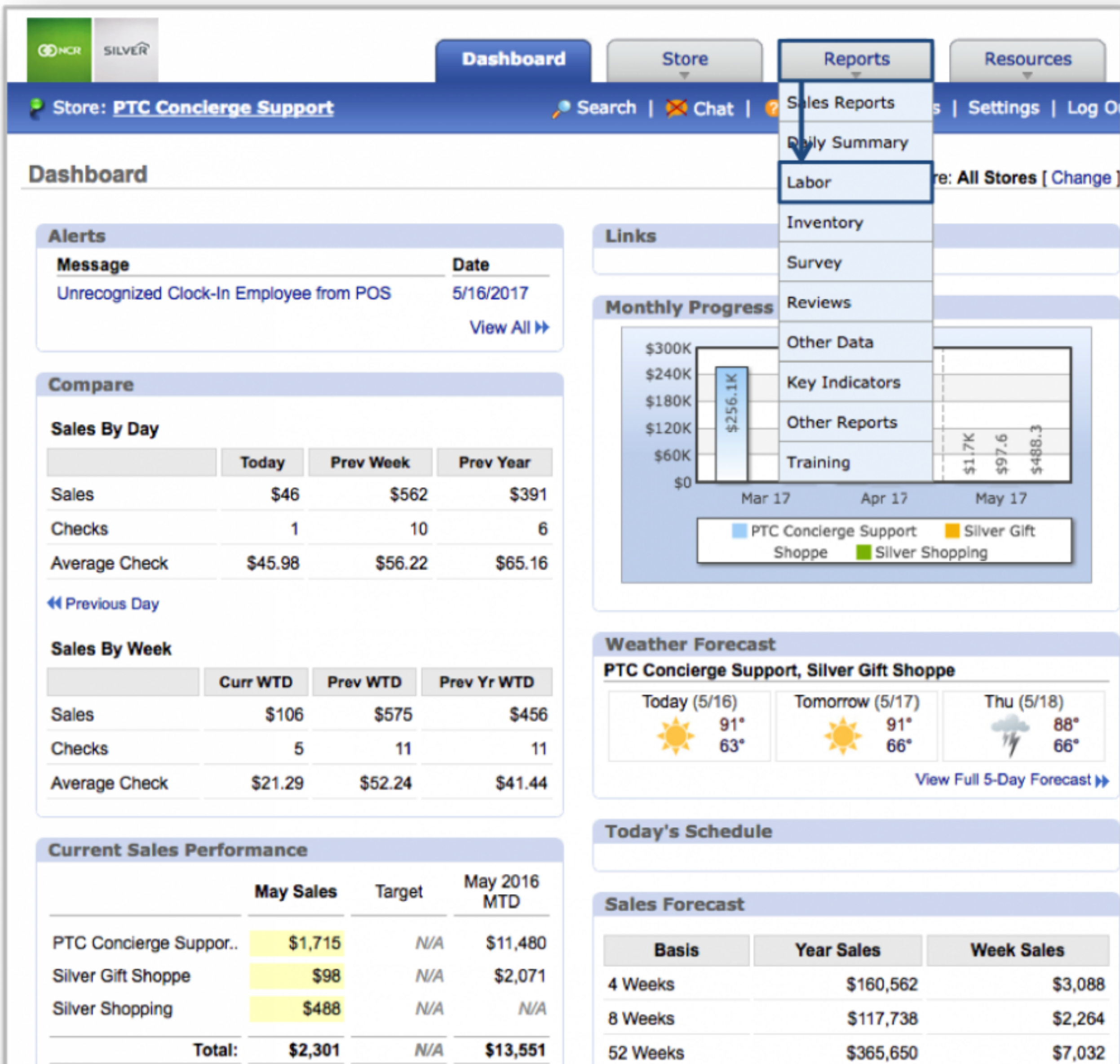
[Labor Costs Report]
[Employee History Report]
[Time Card Discrepancy Report]

Employee History Report

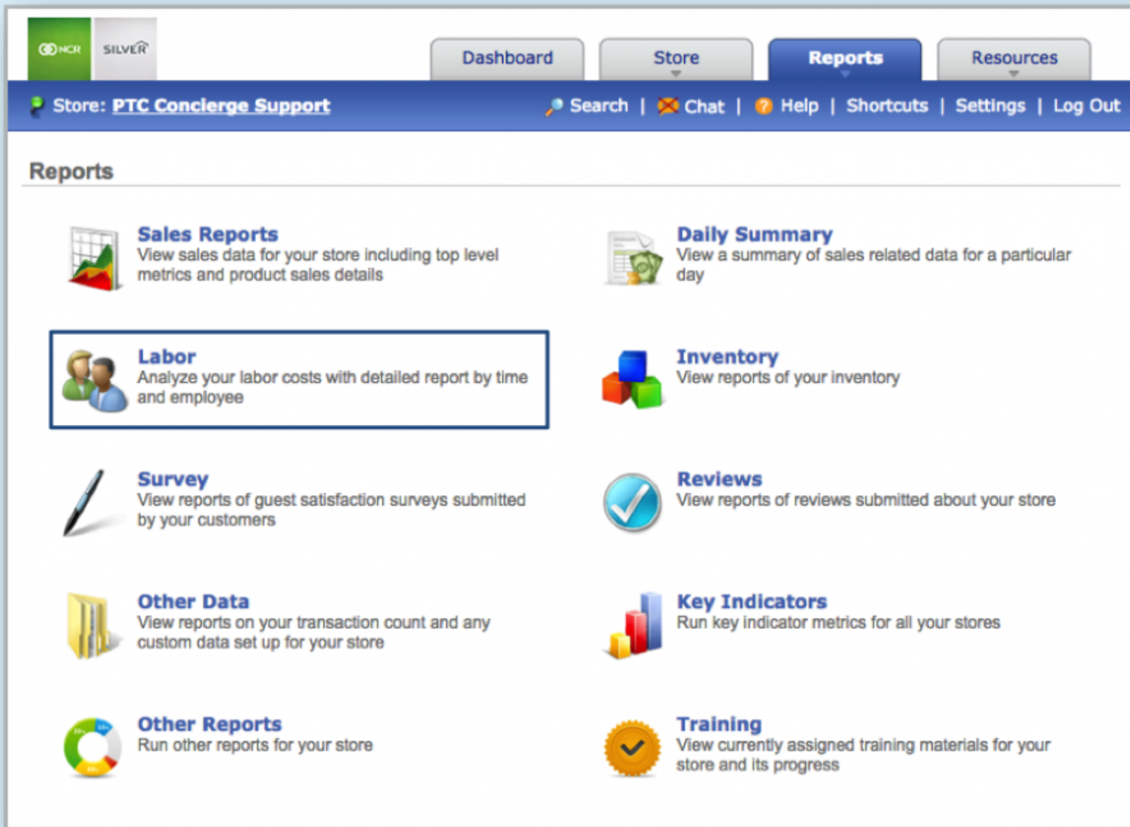
The purpose of this section is to illustrate how to generate an *Employee History Report*.

Generate an Employee History Report

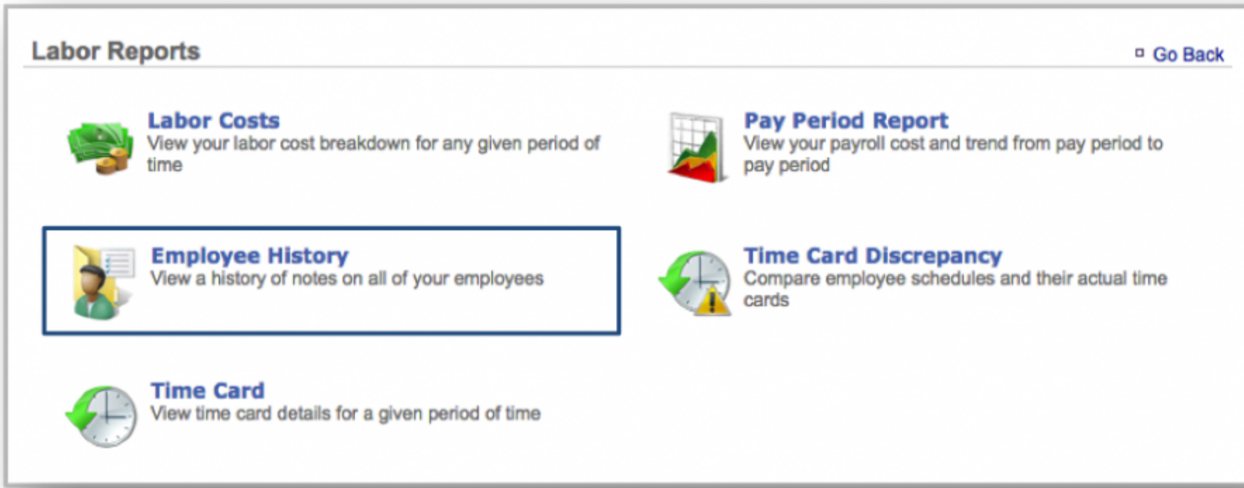
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Labor***.



✱ ***Hint:*** You can also access the *Labor* reports by clicking on the ***Reports*** tab and then on ***Labor***.

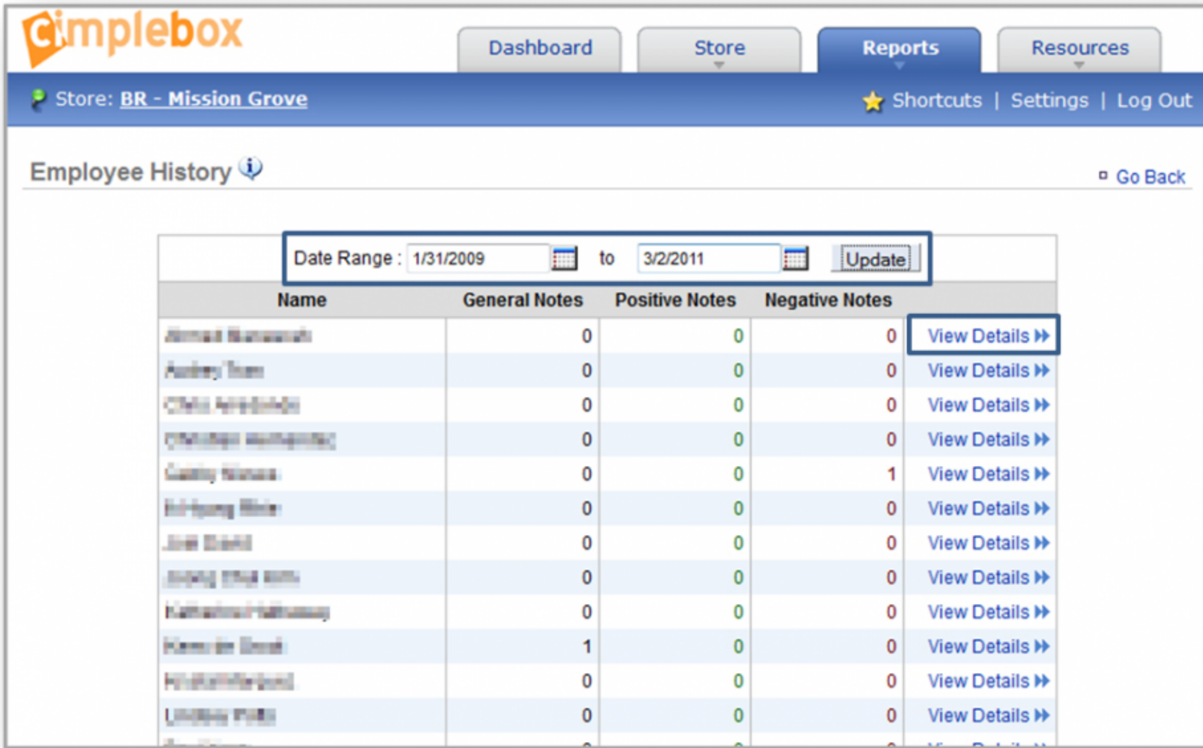


STEP 2: From the *Labor Reports* screen, click ***Employee History***.



STEP 3: This report will show any notes that have been added for an employee (General, Positive and Negative) within the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- To view notes on an employee, click ***View Details*** to the right of the employee's name.



Related Topics

[Labor Costs Report]()

[Pay Period Report]()

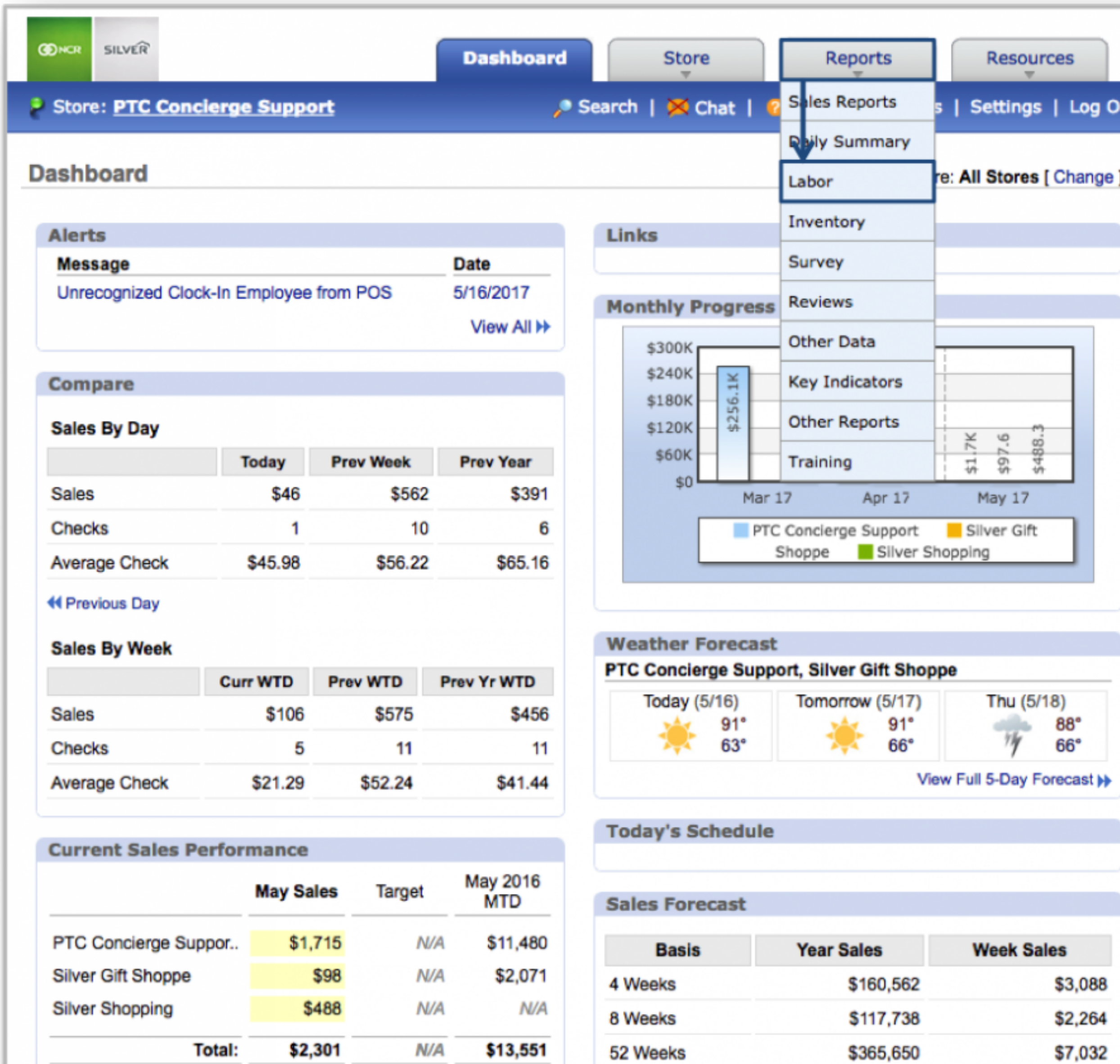
[Time Card Discrepancy Report]()

Time Card Discrepancy

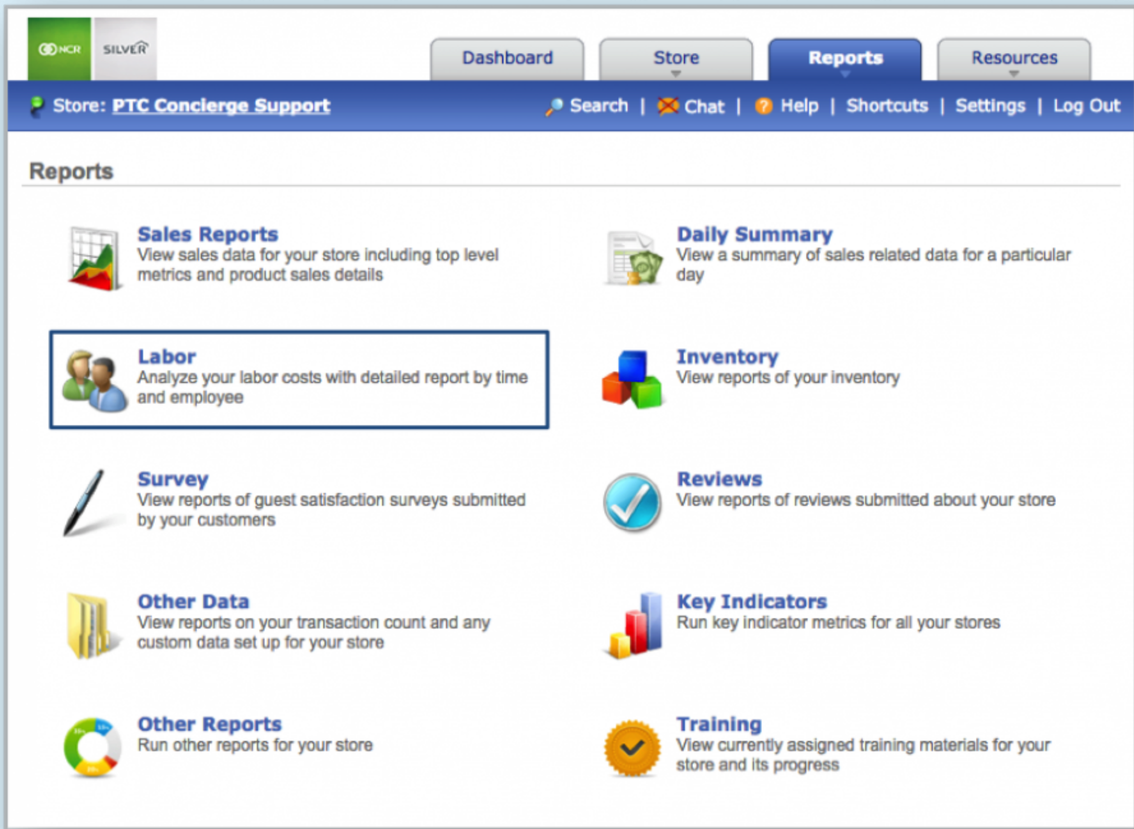
The purpose of this section is to illustrate how to generate a *Time Card Discrepancy Report*.

Generate a Time Card Discrepancy Report

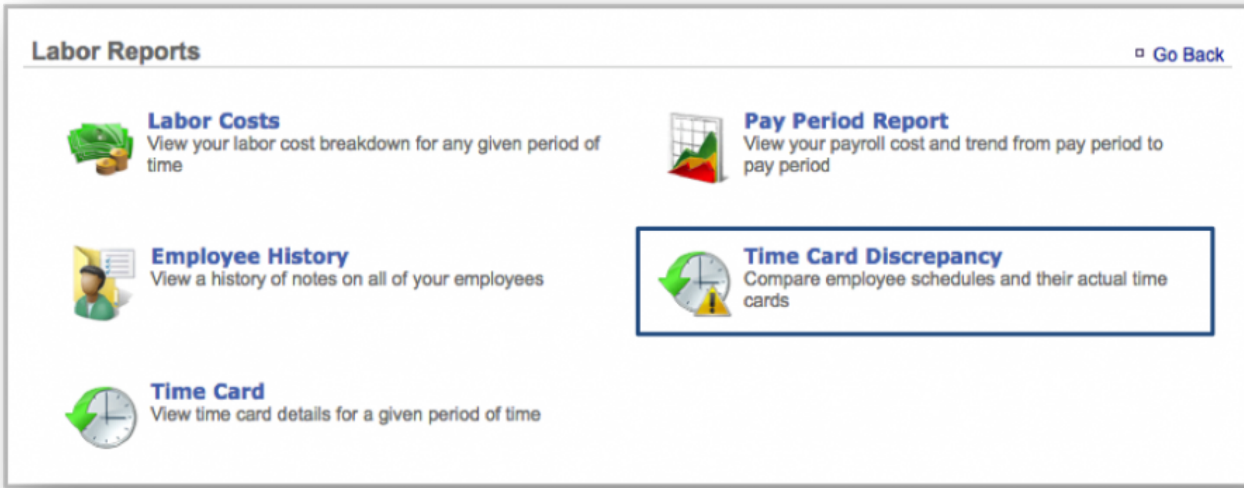
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Labor***.



✱ ***Hint:*** *You can also access the* Labor *reports by clicking on the* ***Reports*** *tab and then on* ***Labor****.*



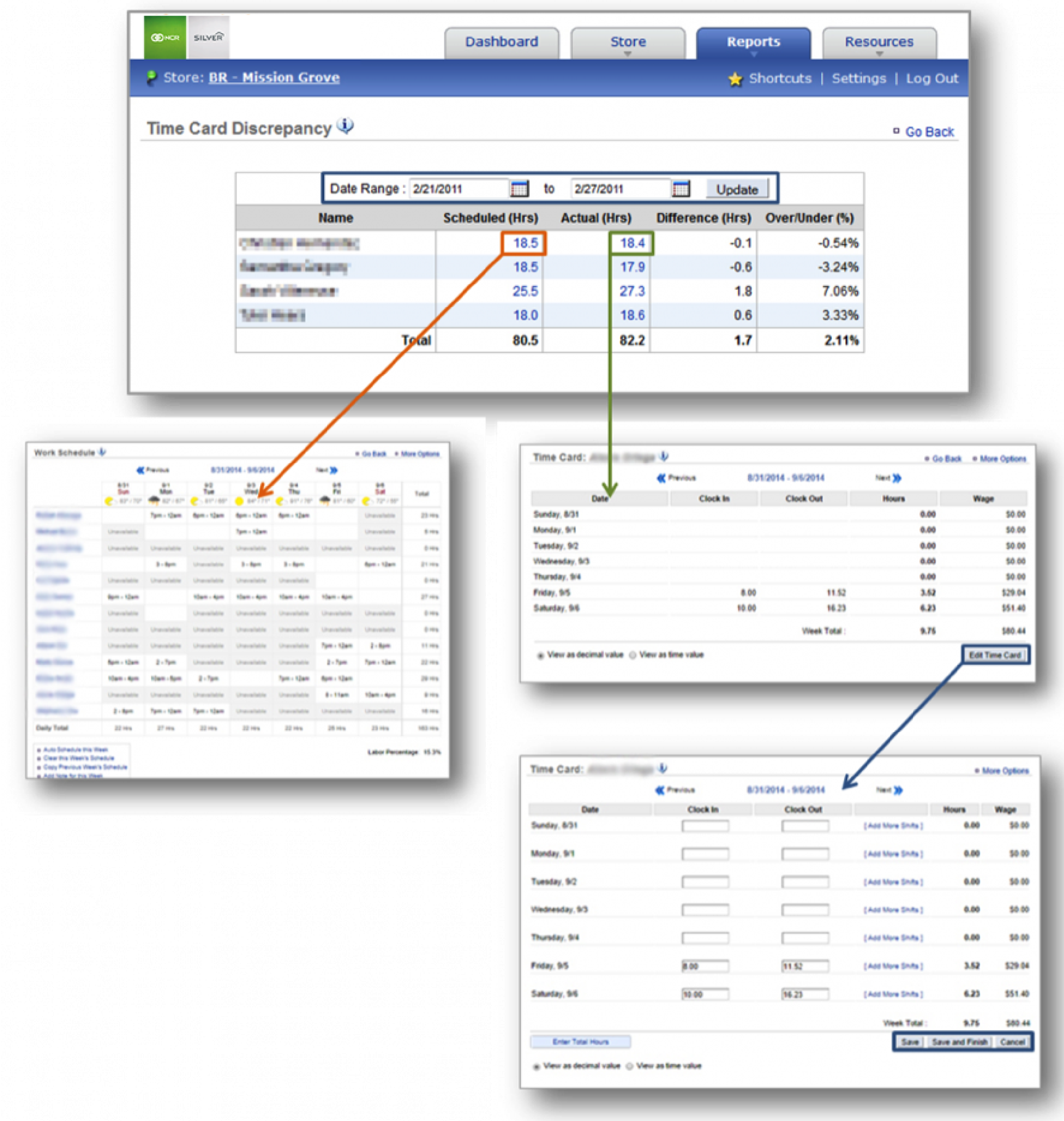
STEP 2: From the *Labor Reports* screen, click ***Time Card Discrepancy***.



STEP 3: This report will show scheduled hours versus actual hours worked by your team members within the date range you set. Any discrepancies will be noted in the Difference (Hrs) column with an over or under percentage to the right of each discrepancy. From this screen, you will have the option to:

- View scheduled hours via the *Work Schedule*, by clicking on a hours total within the Scheduled Hrs column.
- View actual hours worked, by clicking on an hours total within the Actual Hrs column. Note, you will be able to edit hours worked by an employee by clicking ***Edit Time Card*** at the bottom right corner of the

employee screen. For more on *Time Cards*, click here.



Related Topics

Labor Costs Report

Pay Period Report

Employee History Report

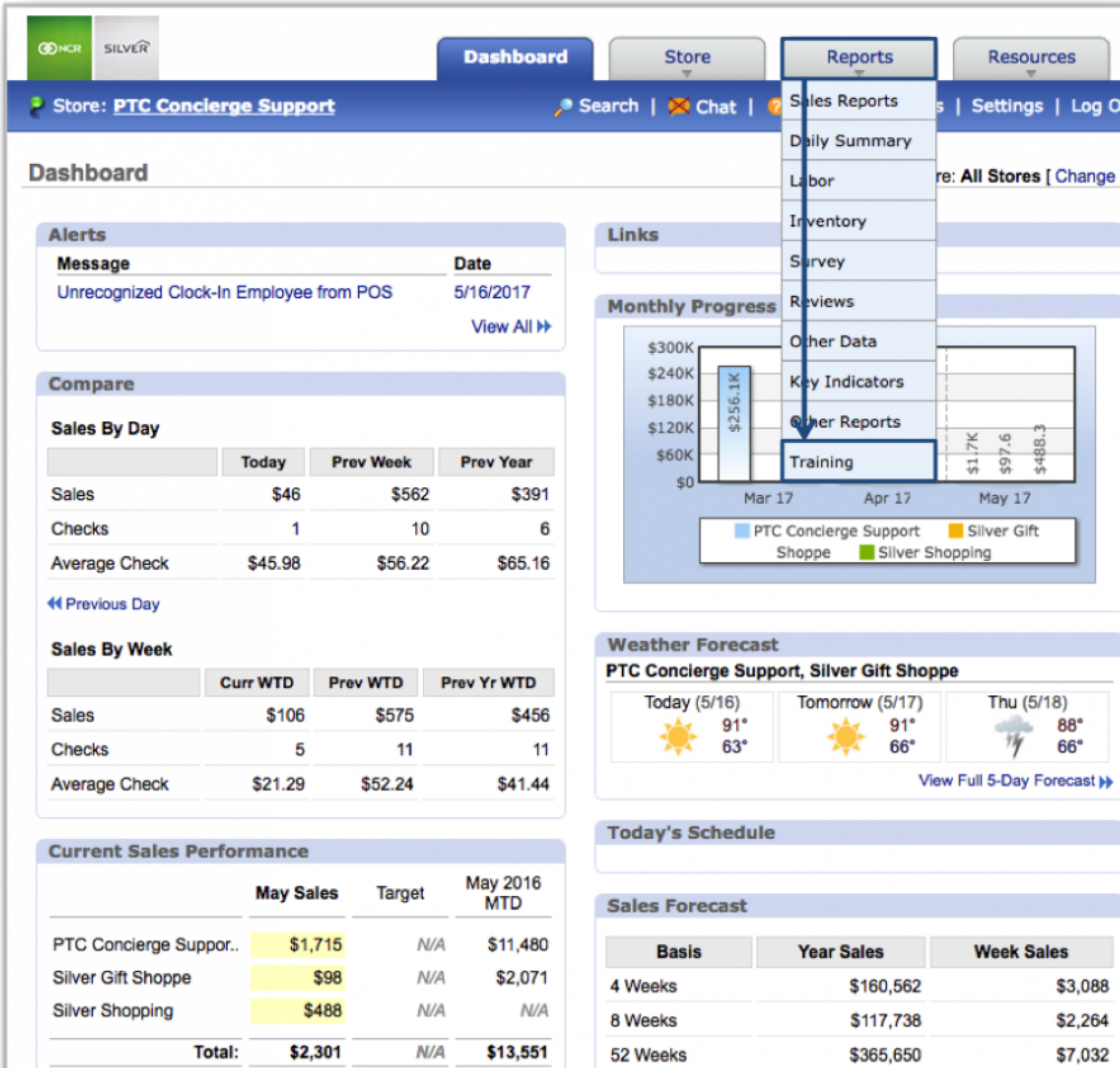
Training Reports

The purpose of this section is to illustrate how to generate a *Training Report*.

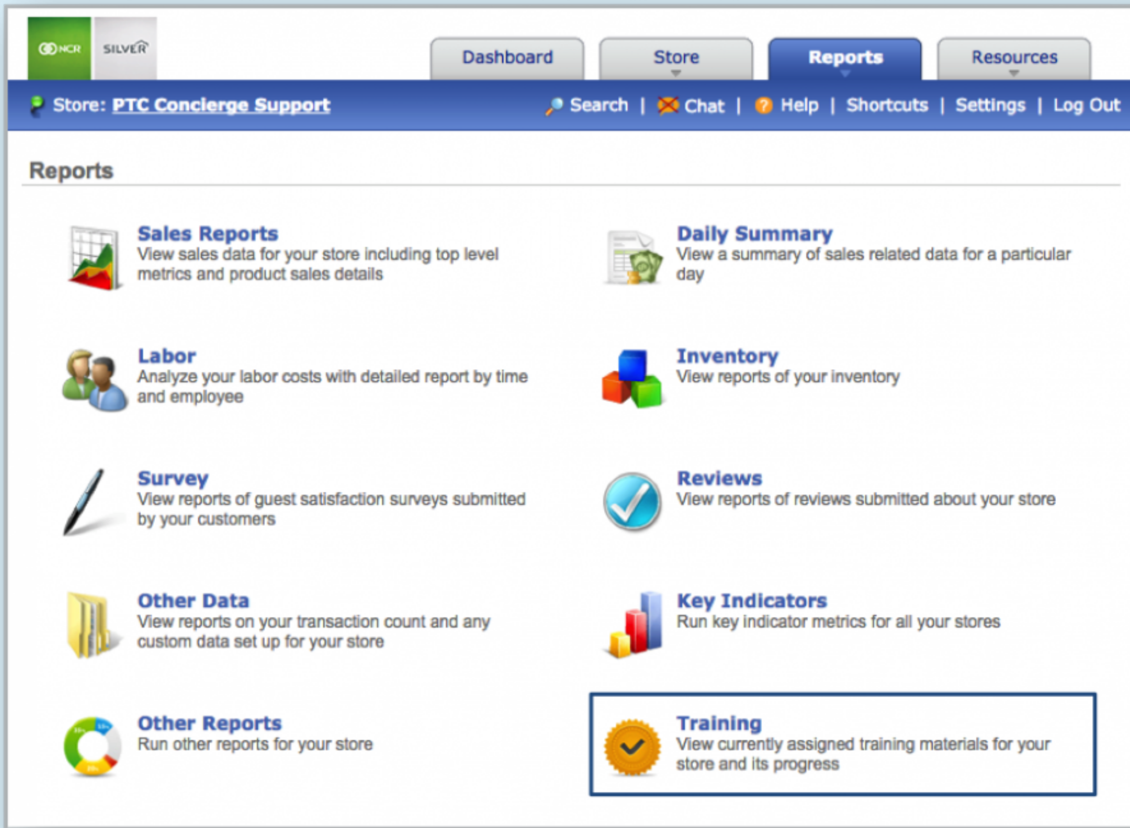
! **Important:** Training materials, videos and certification tests are brand specific and customized to fit your brand's needs. Therefore, this section will primarily focus on how to navigate to, and generate, a training report. What you see when a report is generated will be based on your brand's specific training program.

Generate a Training Report

From your Dashboard view, mouse over the ***Reports*** tab and click ***Training***.



✱ ***Hint:*** You can also access the *Training* report by clicking on the ***Reports*** tab and then on ***Training***.



From the *Training Reports* screen, you will see:

- A list of all current coursework.
- How many team members have been assigned specific coursework.
- How many team members have completed assigned coursework.

- A completion percentage for each course.

Training

Go Back

Class	Assigned	Completed	Percent
Recipe Creation			
Spoonable Smoothie	6	0	0.0%
Lemonade Yogurt, Lemonade Chillers & Coffee Chillers Certification Test	5	0	0.0%
Frozen Coffee Chiller Creation	6	0	0.0%
Frozen Lemonade Chiller Creation	3	0	0.0%
Caramel Apple Pie Dream Shake	5	0	0.0%
Artisan Hot Chocolate Certification Test	3	0	0.0%
Smoothie Certification Test	6	1	16.7%
Training Module Videos > Taylor Machine Operations Module			
Assembling the Taylor Machine	6	0	0.0%
Sanitizing the Taylor Machine	6	0	0.0%
Priming the Taylor Machine	6	0	0.0%
Disassembling the Taylor Machine	6	0	0.0%
Taylor Brush Cleaning	6	0	0.0%
Certification Test	6	0	0.0%

Related Topics

[Sales Reports](#)
[Inventory Reports](#)
[Product Mix Reports](#)
[Labor Reports](#)
[Survey Reports](#)

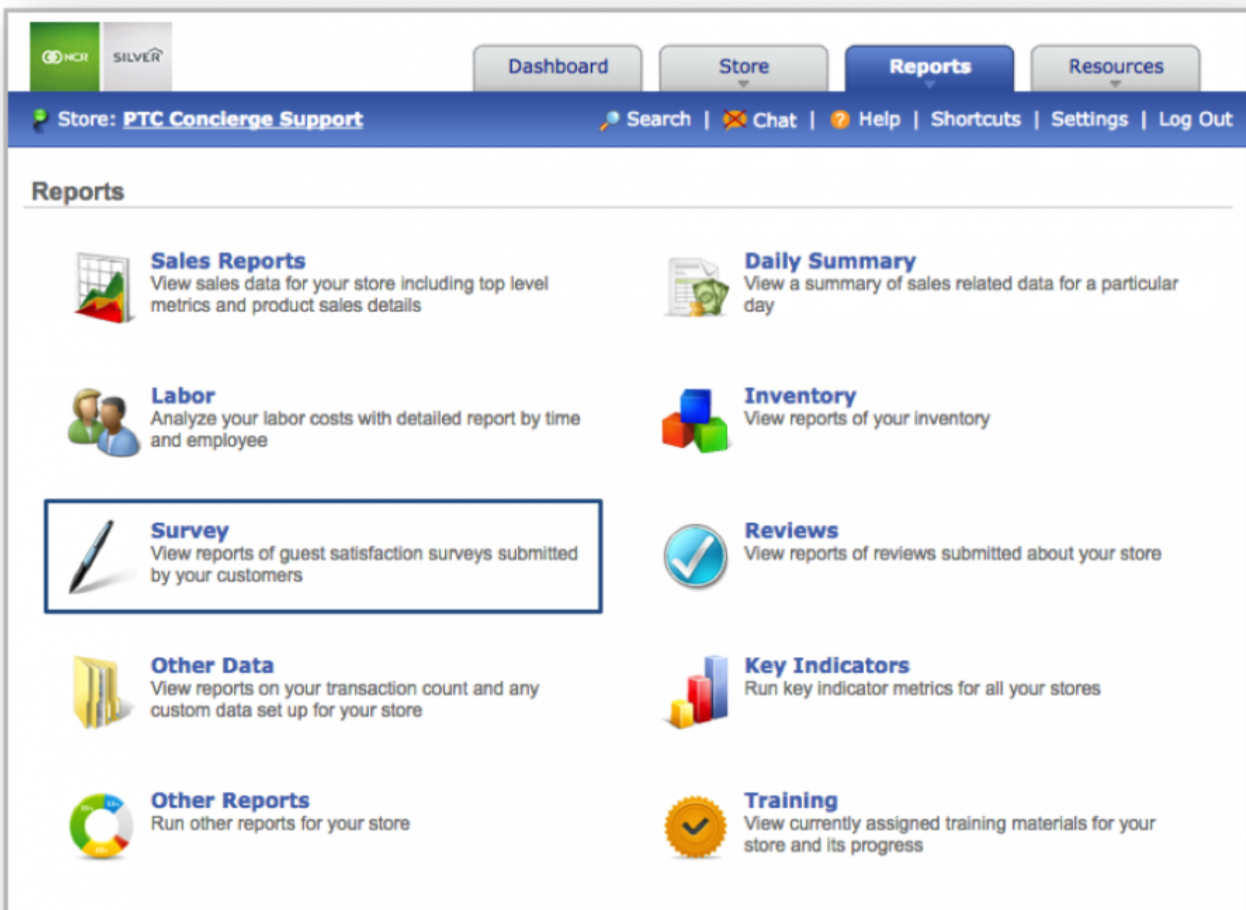
Survey Reports

The purpose of this section is to illustrate how to generate a *Survey Report*.

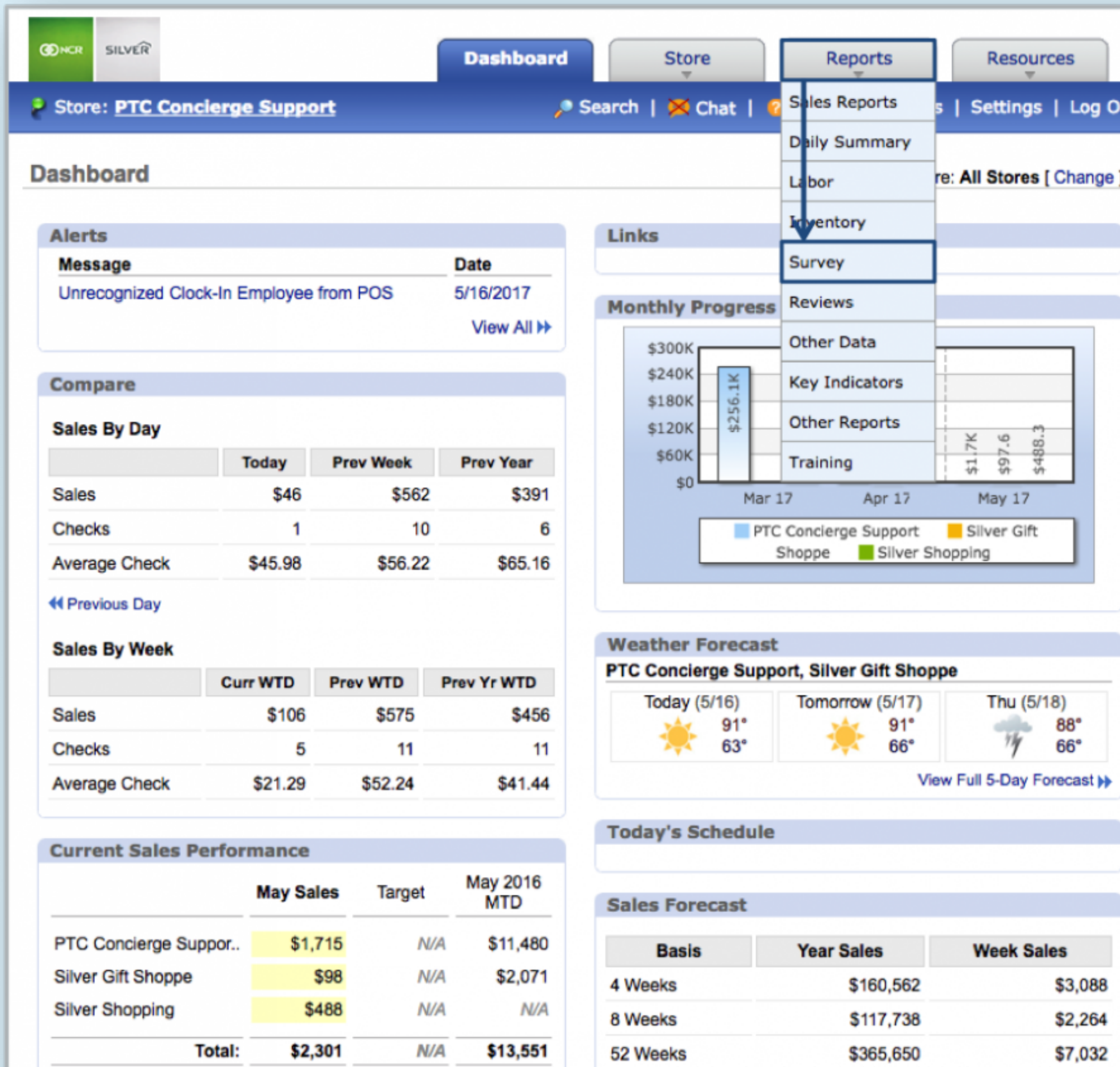
! **Important:** Surveys are brand specific and customized to fit your brand's needs. Therefore, this section will primarily focus on how to navigate to, and generate, a survey report. What you see when a report is generated will be based on your brand's specific survey program(s).

Generate a Survey Report

From your Dashboard view, mouse over the ***Reports*** tab and click ***Survey***.



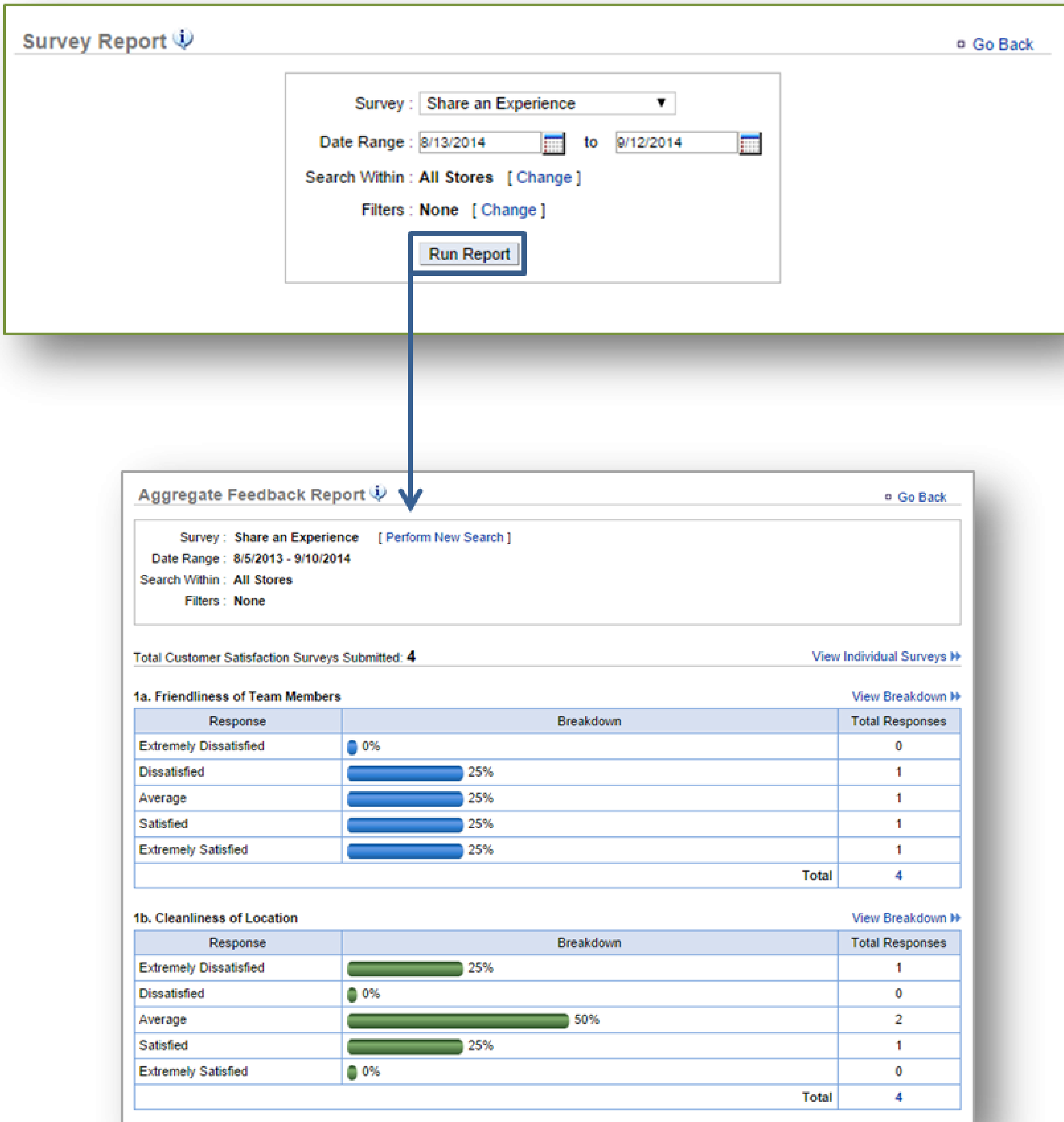
Hint: You can also access the *Survey* reports by clicking on the ***Reports*** tab and then on ***Survey***.



From the *Survey Reports* screen, you will have the option to:

- Select which survey you'd like to see. To do so, click the drop down arrow to the right of Survey to select from your list of available surveys.
- Select a date range to view.
- Search a single store or within a group of stores (if you operate multiple locations). To do this, click ***Change*** to the right of *Search Within* and check only those stores you wish to view results for.

- Filter your survey down to specific questions. To do this, click ***Change*** to the right of *Filters* and select the question you wish to view results for.
  Once you have modified your search criteria, click Run Report.



Note: Once you generate a survey report, you will have the option to view individual surveys or question breakdowns.

Related Topics

Sales Reports

Inventory Reports

Product Mix Reports

Labor Reports

Training Reports

Other Reports

The purpose of this section is to showcase the reports within the Other Report category. Click on a report below for more detailed information.

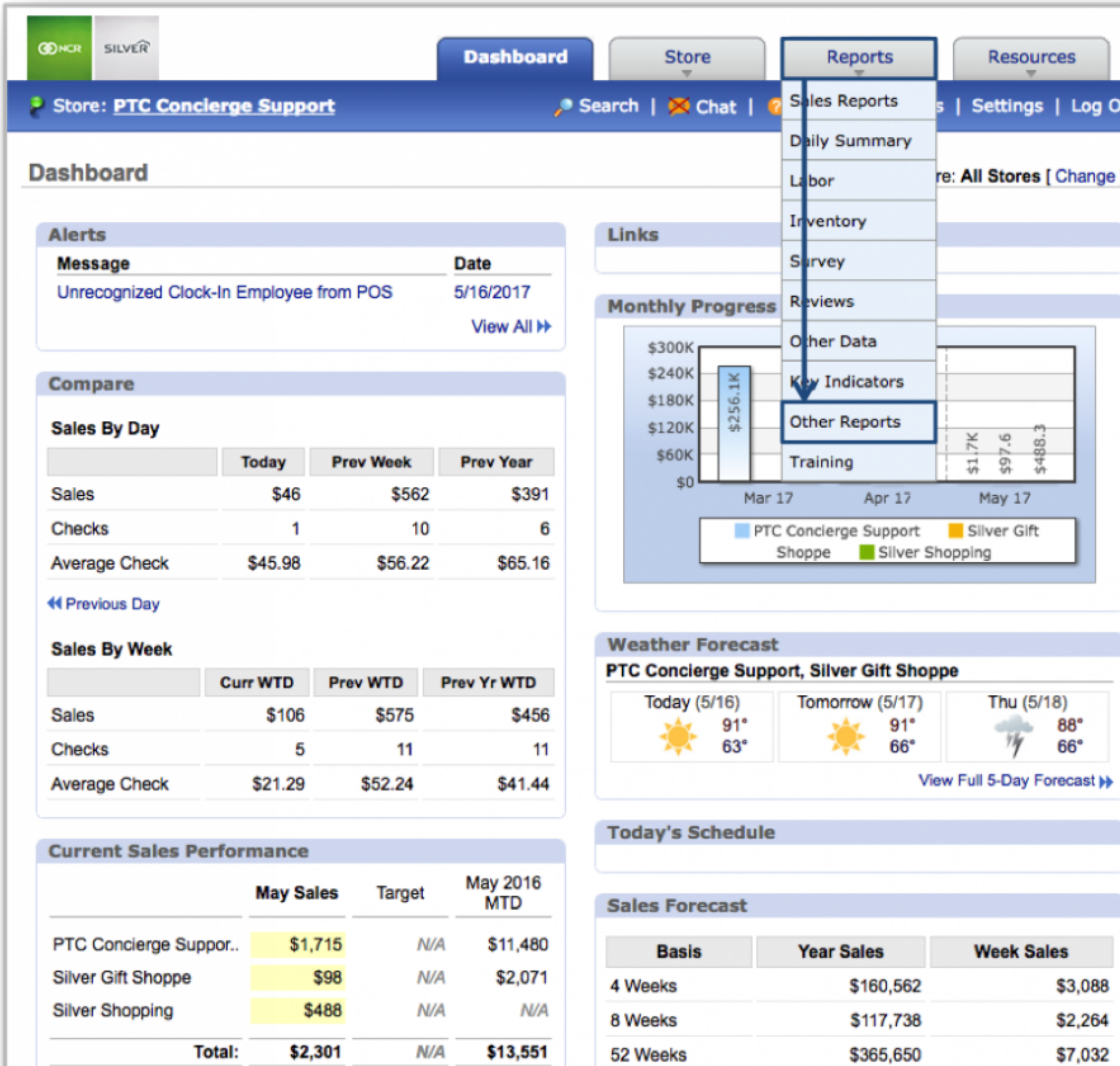
Please note that based on your brand's chosen solution, there may be reports that are not visible on your platform.

Discount Details Report

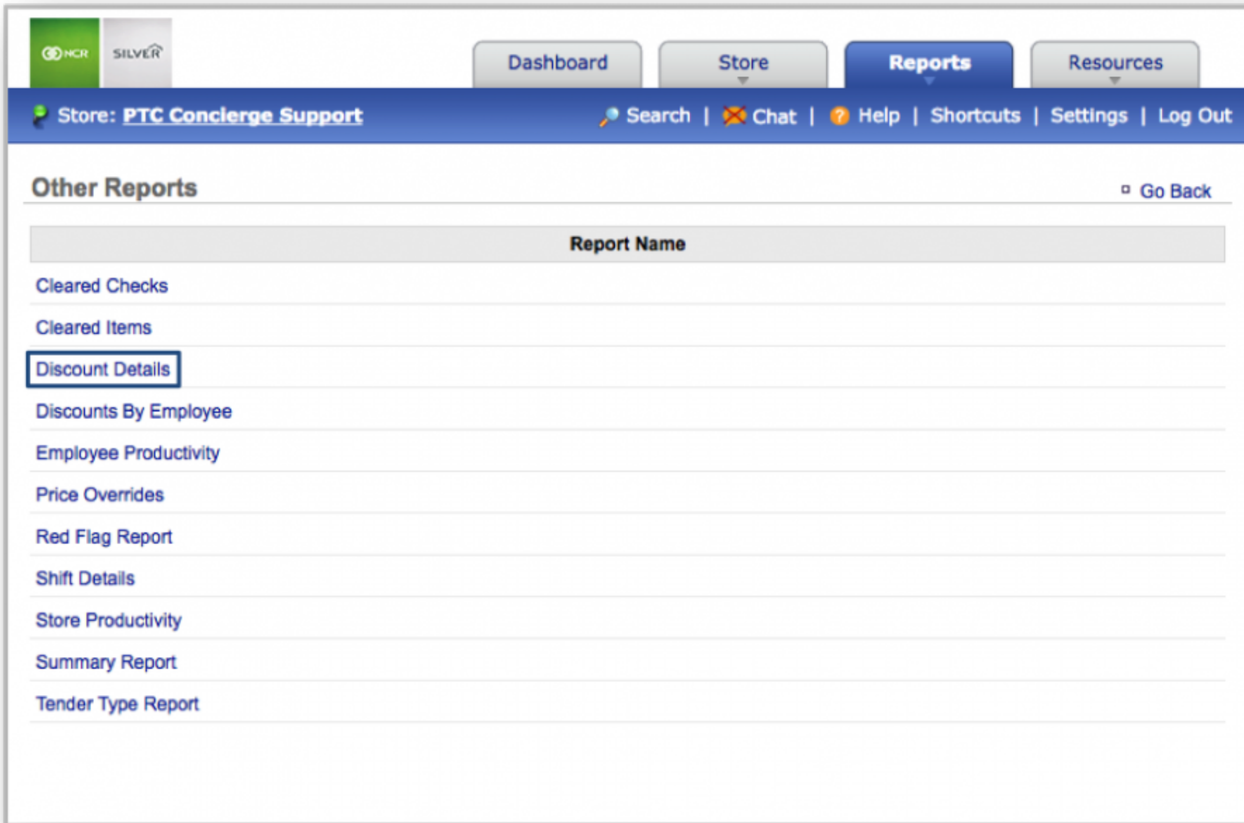
The purpose of this section is to showcase the Discount Details Report, which provides you with your store's discount details for any date range you specify.

Generating the Discount Details Report

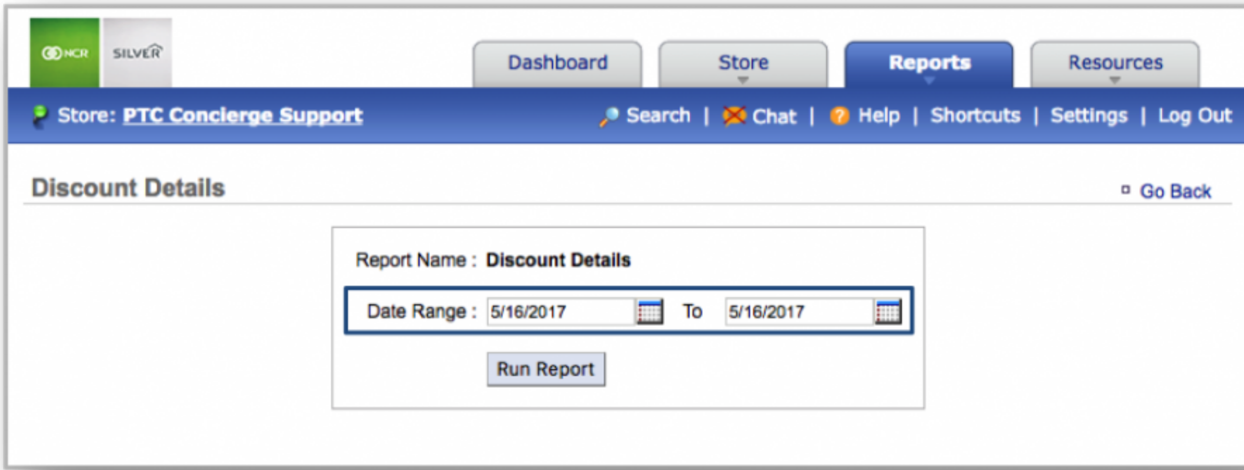
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Discount Details***.

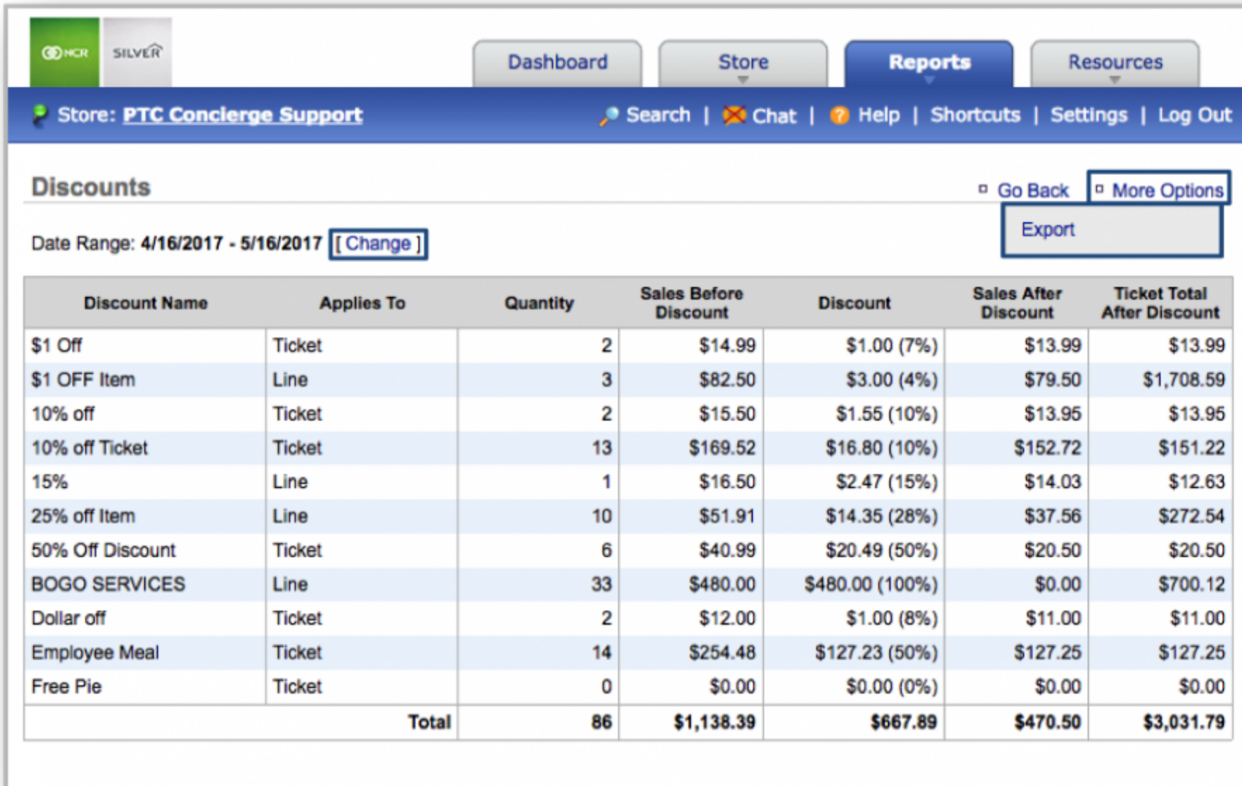


STEP 3: Select your preferred data range and click ***Run Report***.



Discount Details

Once the report is generated, discounts will be listed to the left, under *Discount Name*. Each discount is broken down into further details, shown to the right.



Discount Name	Applies To	Quantity	Sales Before Discount	Discount	Sales After Discount	Ticket Total After Discount
$1 Off	Ticket	2	$14.99	$1.00 (7%)	$13.99	$13.99
$1 OFF Item	Line	3	$82.50	$3.00 (4%)	$79.50	$1,708.59
10% off	Ticket	2	$15.50	$1.55 (10%)	$13.95	$13.95
10% off Ticket	Ticket	13	$169.52	$16.80 (10%)	$152.72	$151.22
15%	Line	1	$16.50	$2.47 (15%)	$14.03	$12.63
25% off Item	Line	10	$51.91	$14.35 (28%)	$37.56	$272.54
50% Off Discount	Ticket	6	$40.99	$20.49 (50%)	$20.50	$20.50
BOGO SERVICES	Line	33	$480.00	$480.00 (100%)	$0.00	$700.12
Dollar off	Ticket	2	$12.00	$1.00 (8%)	$11.00	$11.00
Employee Meal	Ticket	14	$254.48	$127.23 (50%)	$127.25	$127.25
Free Pie	Ticket	0	$0.00	$0.00 (0%)	$0.00	$0.00
	Total	86	$1,138.39	$667.89	$470.50	$3,031.79

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

Related Topics within Other Reports

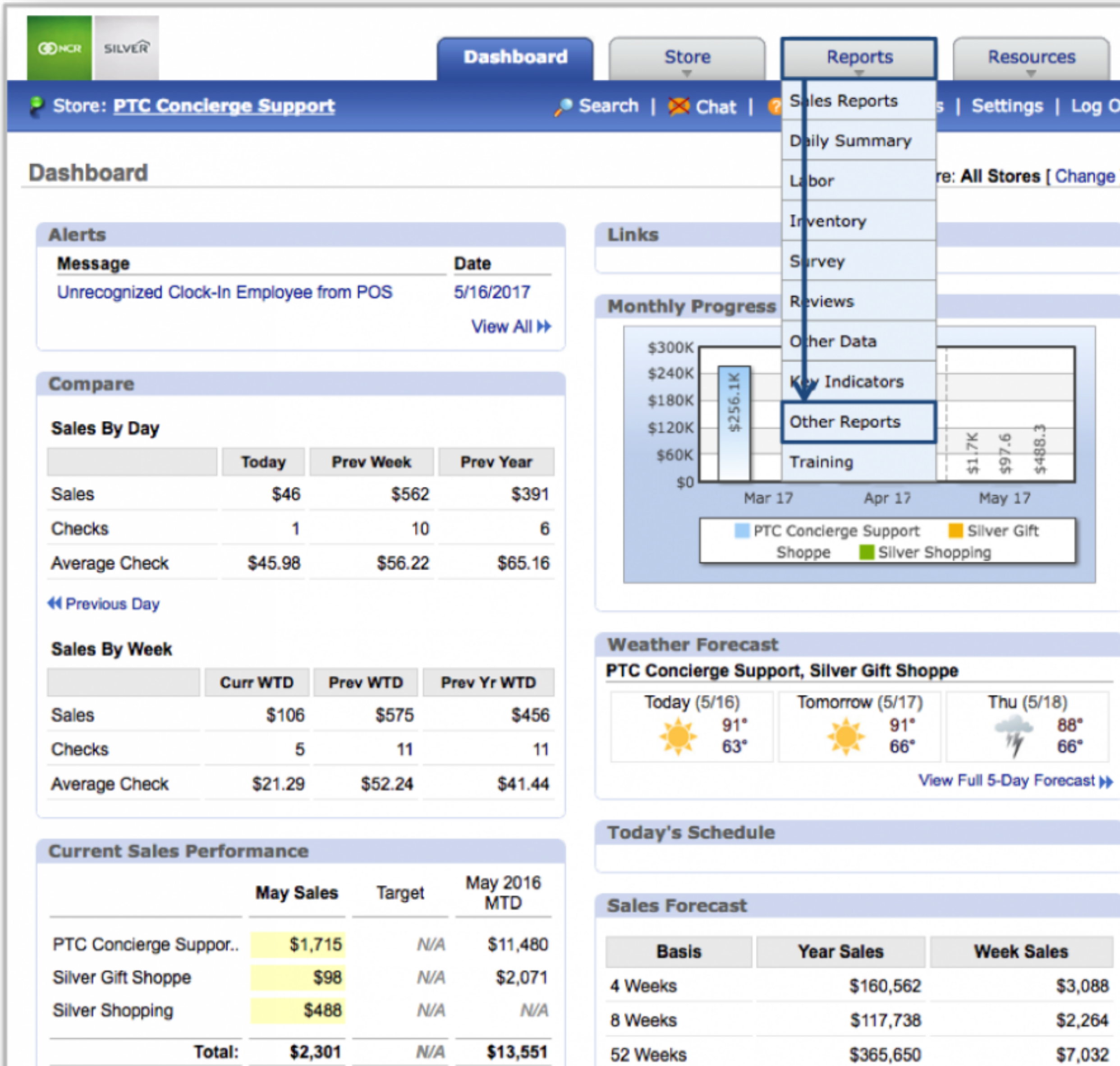
Discounts by Employee Report
Employee Productivity Report
Red Flag Report
Shift Details Report
Store Productivity Report
Summary Report
Tender Type Report

Discounts by Employee Report

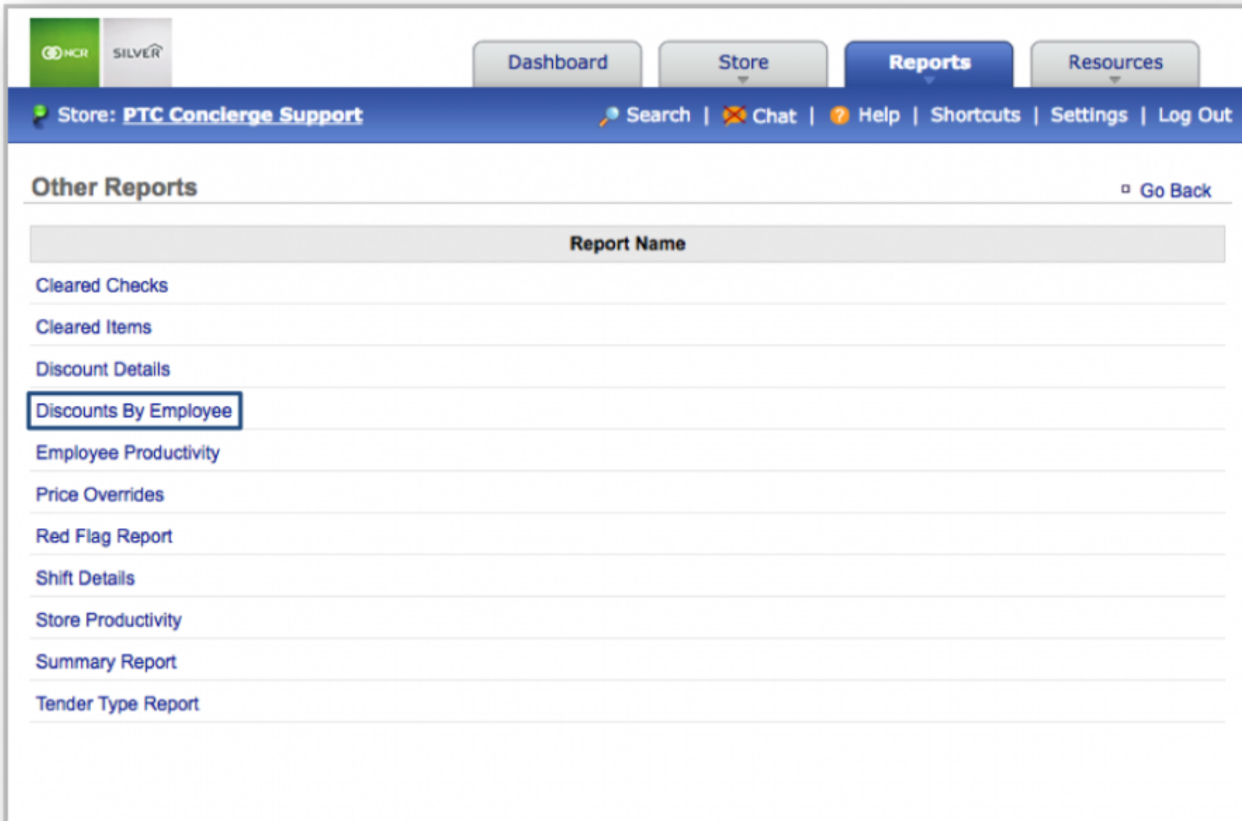
The purpose of this section is to showcase the Discounts by Employee Report, which provides you with your store's discounts by employee data for any date range you specify.

Generating the Discounts by Employee Report

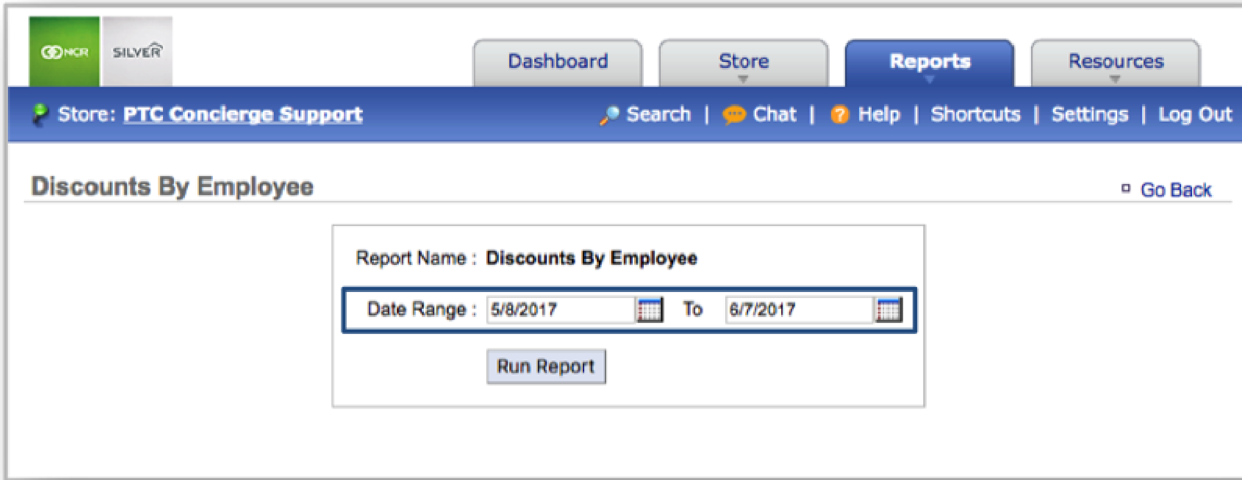
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Discounts By Employee***.

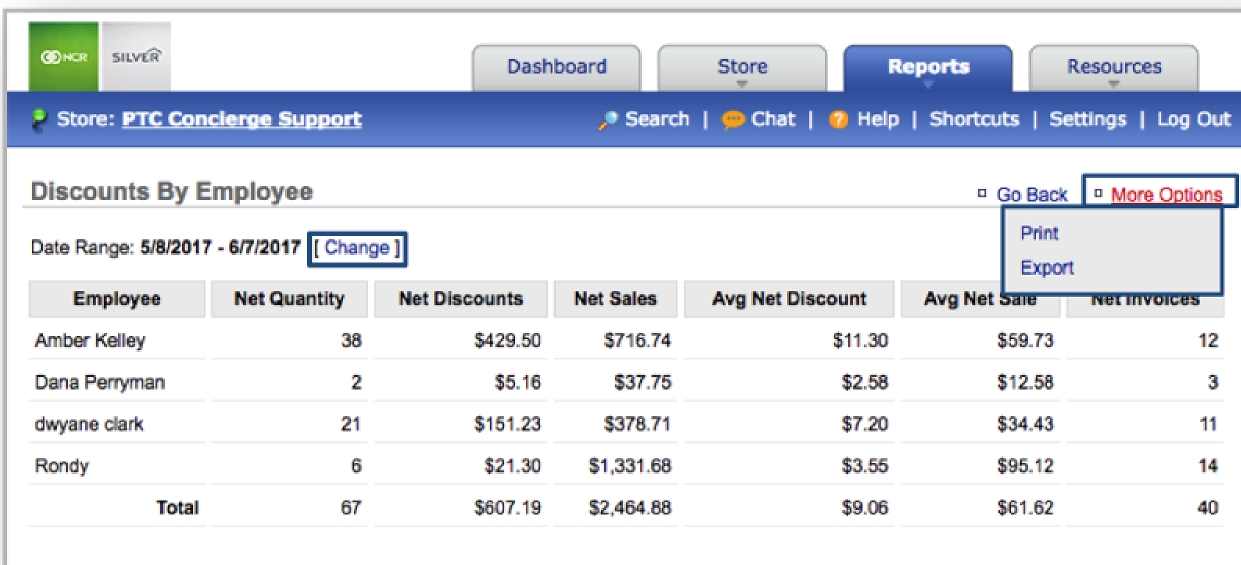


STEP 3: Select your preferred data range and click ***Run Report***.



Discounts by Employee

Once the report is generated, employee names will be listed to the left, under *Employee*. To the right are discount details associated with that employee.



Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

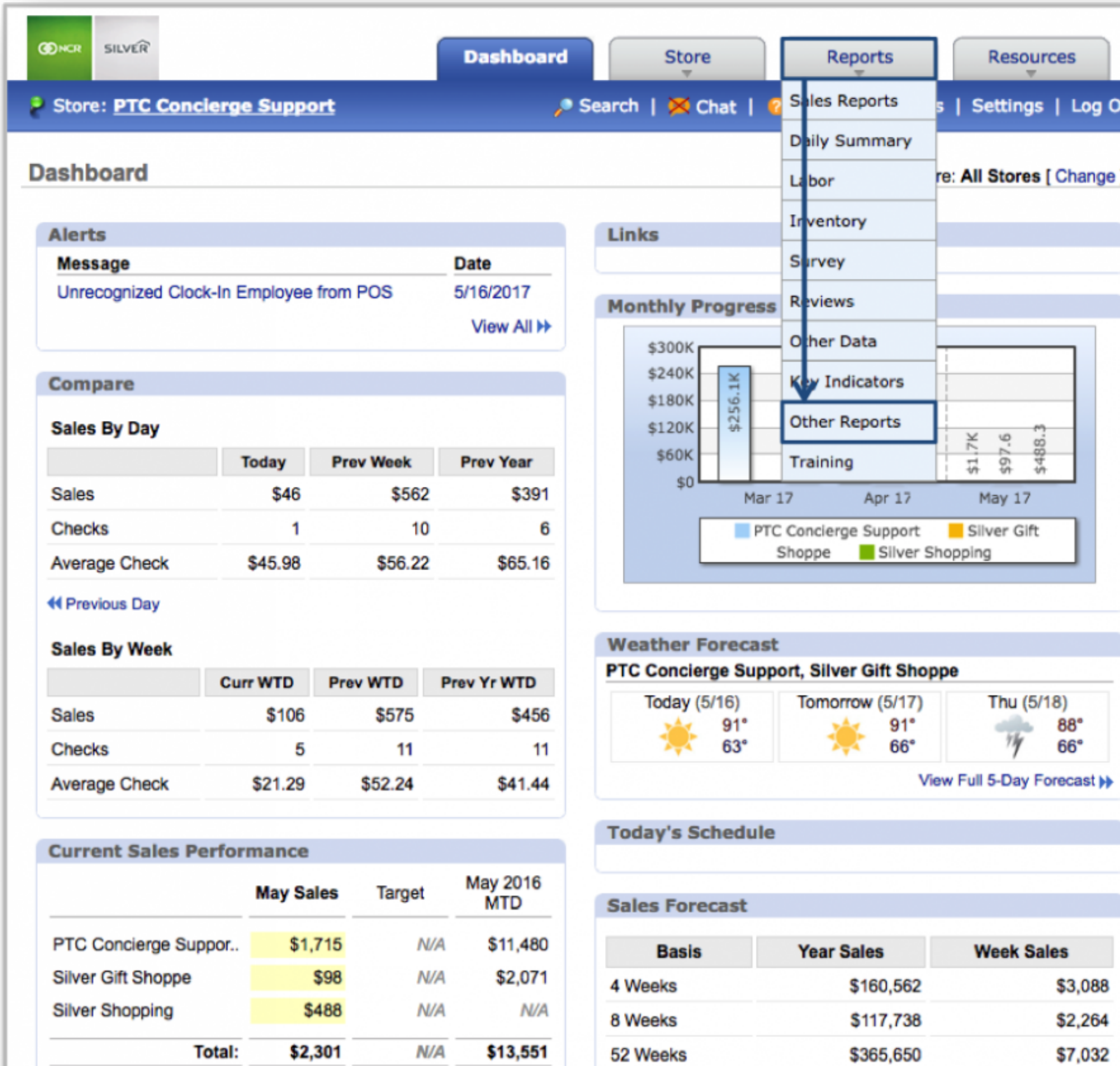
Related Topics within Other Reports

Discount Details Report
Employee Productivity Report
Red Flag Report
Shift Details Report
Store Productivity Report
Summary Report
Tender Type Report

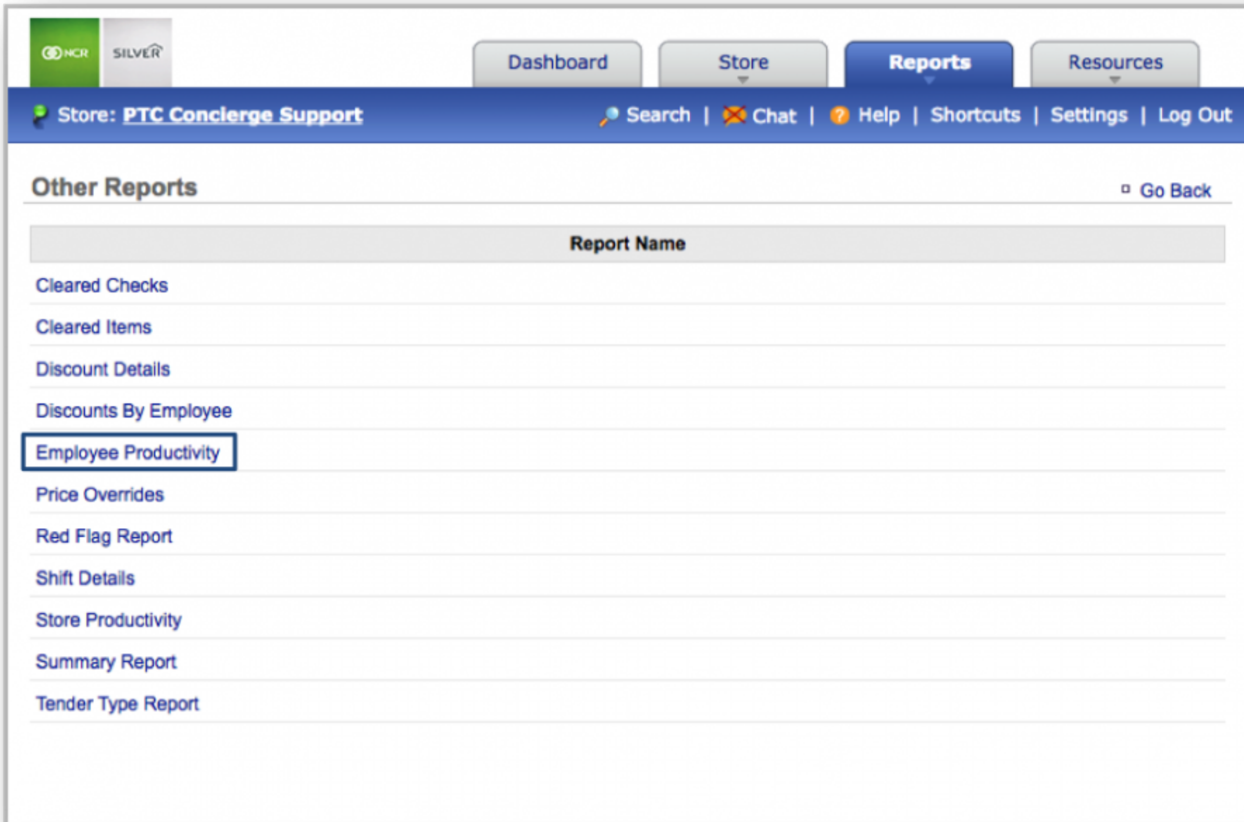
Employee Productivity Report

The purpose of this section is to showcase the Employee Productivity Report, which provides you with employee productivity data for any date range you specify.

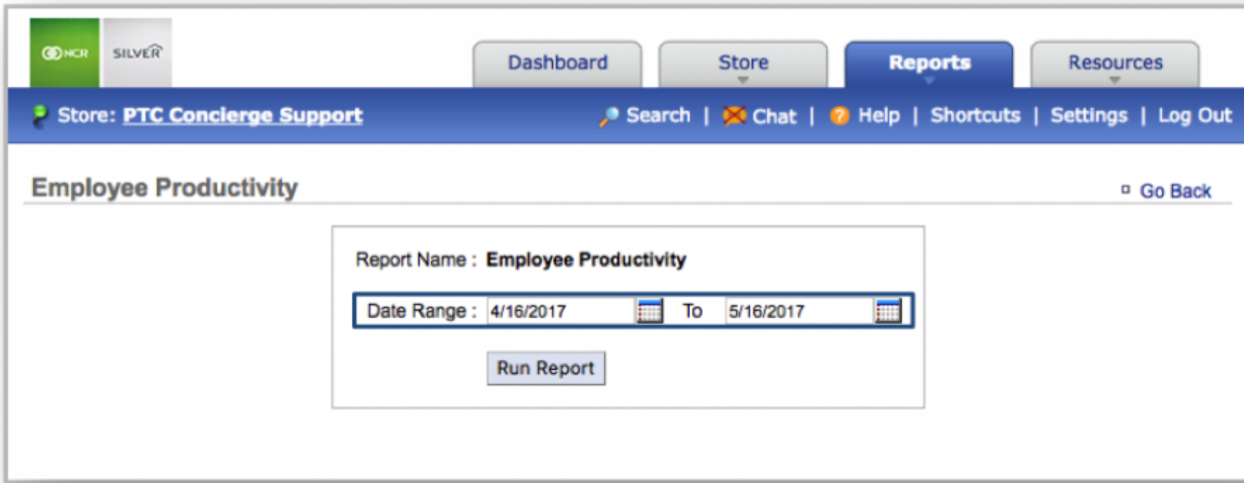
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Employee Productivity***.

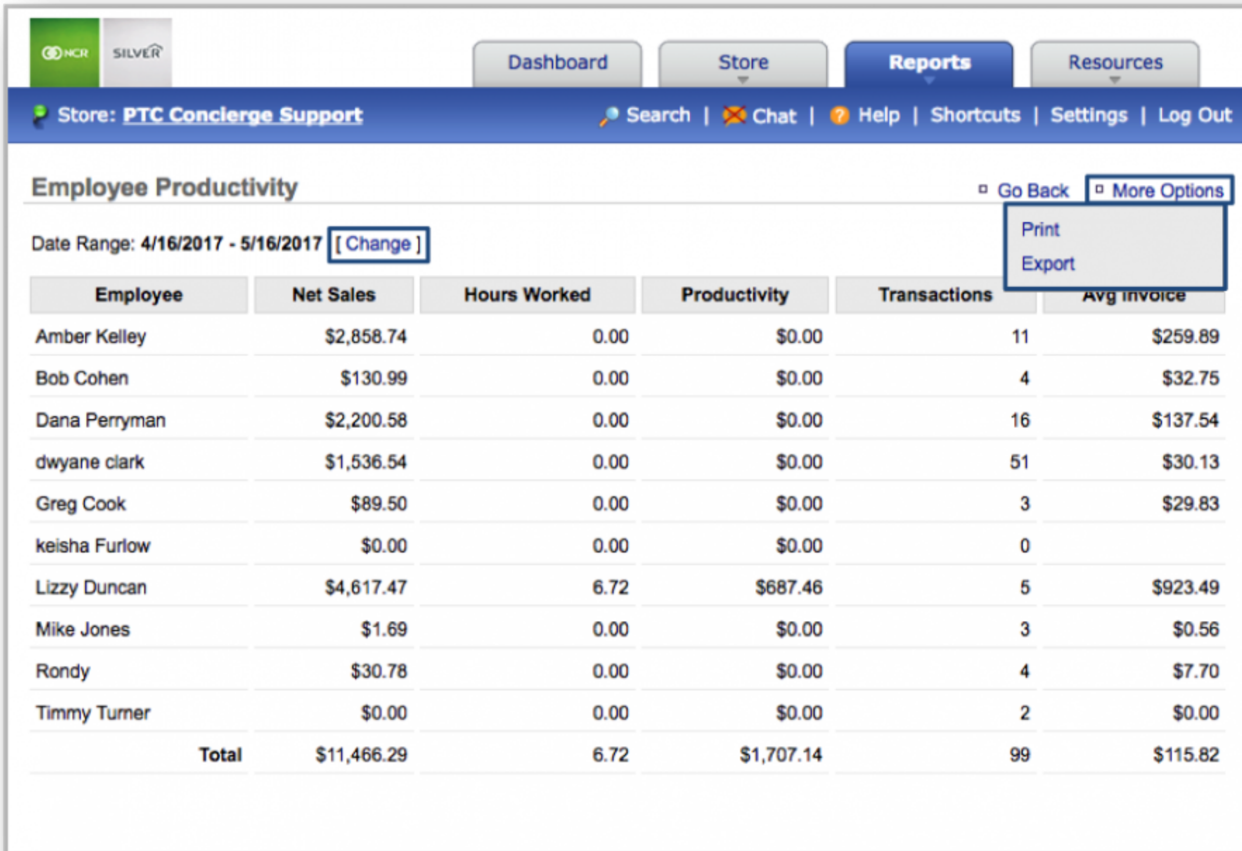


STEP 3: Select your preferred data range and click ***Run Report***.



Employee Productivity

Once the report is generated, employee names will be listed to the left, under *Employee*. To the right are productivity details associated with that employee (calculated by net sales to hours worked, with additional details such as transactions and average invoice totals).



Employee	Net Sales	Hours Worked	Productivity	Transactions	Avg Invoice
Amber Kelley	$2,858.74	0.00	$0.00	11	$259.89
Bob Cohen	$130.99	0.00	$0.00	4	$32.75
Dana Perryman	$2,200.58	0.00	$0.00	16	$137.54
dwyane clark	$1,536.54	0.00	$0.00	51	$30.13
Greg Cook	$89.50	0.00	$0.00	3	$29.83
keisha Furlow	$0.00	0.00	$0.00	0	
Lizzy Duncan	$4,617.47	6.72	$687.46	5	$923.49
Mike Jones	$1.69	0.00	$0.00	3	$0.56
Rondy	$30.78	0.00	$0.00	4	$7.70
Timmy Turner	$0.00	0.00	$0.00	2	$0.00
Total	$11,466.29	6.72	$1,707.14	99	$115.82

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

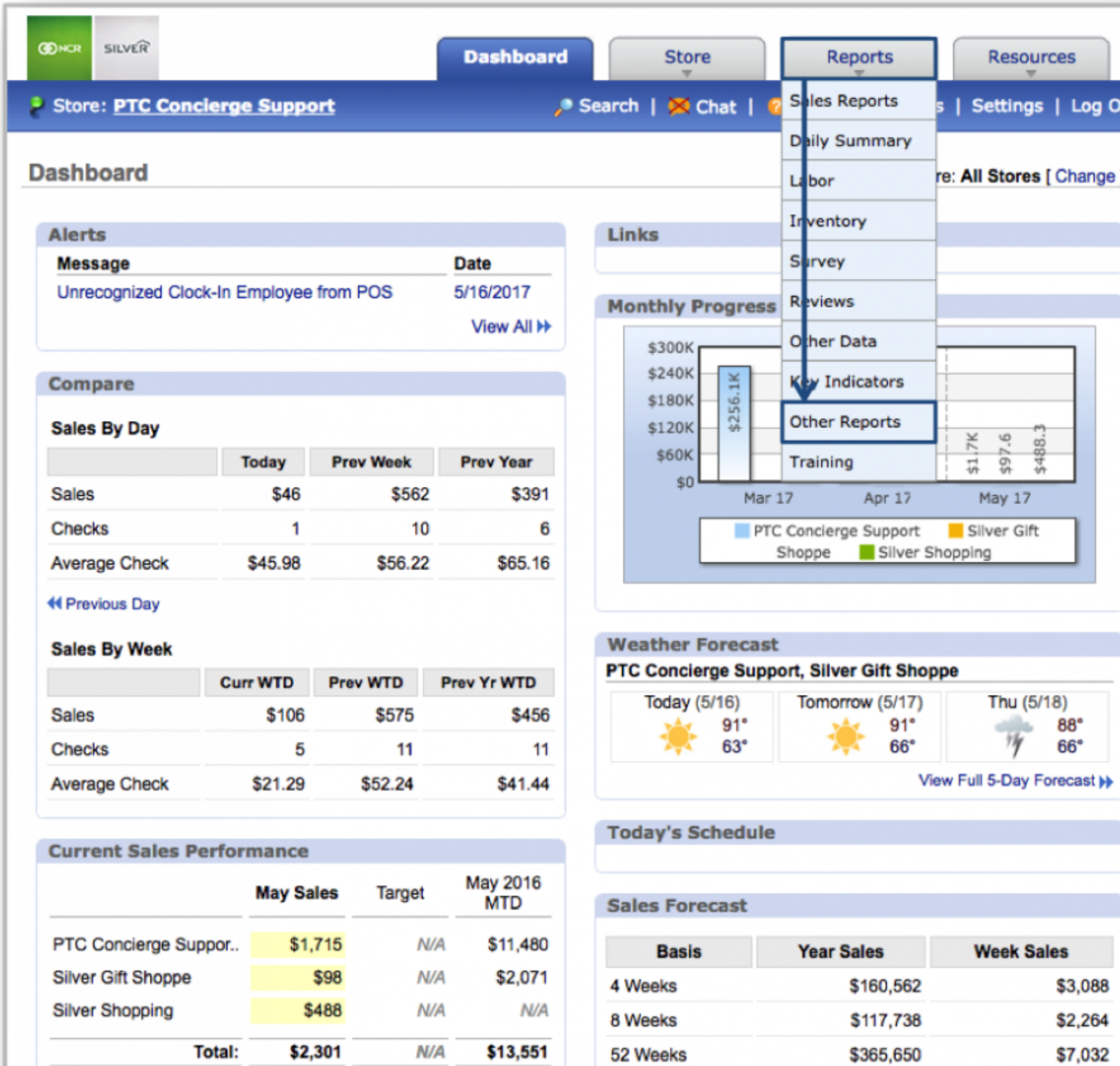
Related Topics within Other Reports

Discount Details Report
Discounts by Employee Report
Red Flag Report
Shift Details Report
Store Productivity Report
Summary Report
Tender Type Report

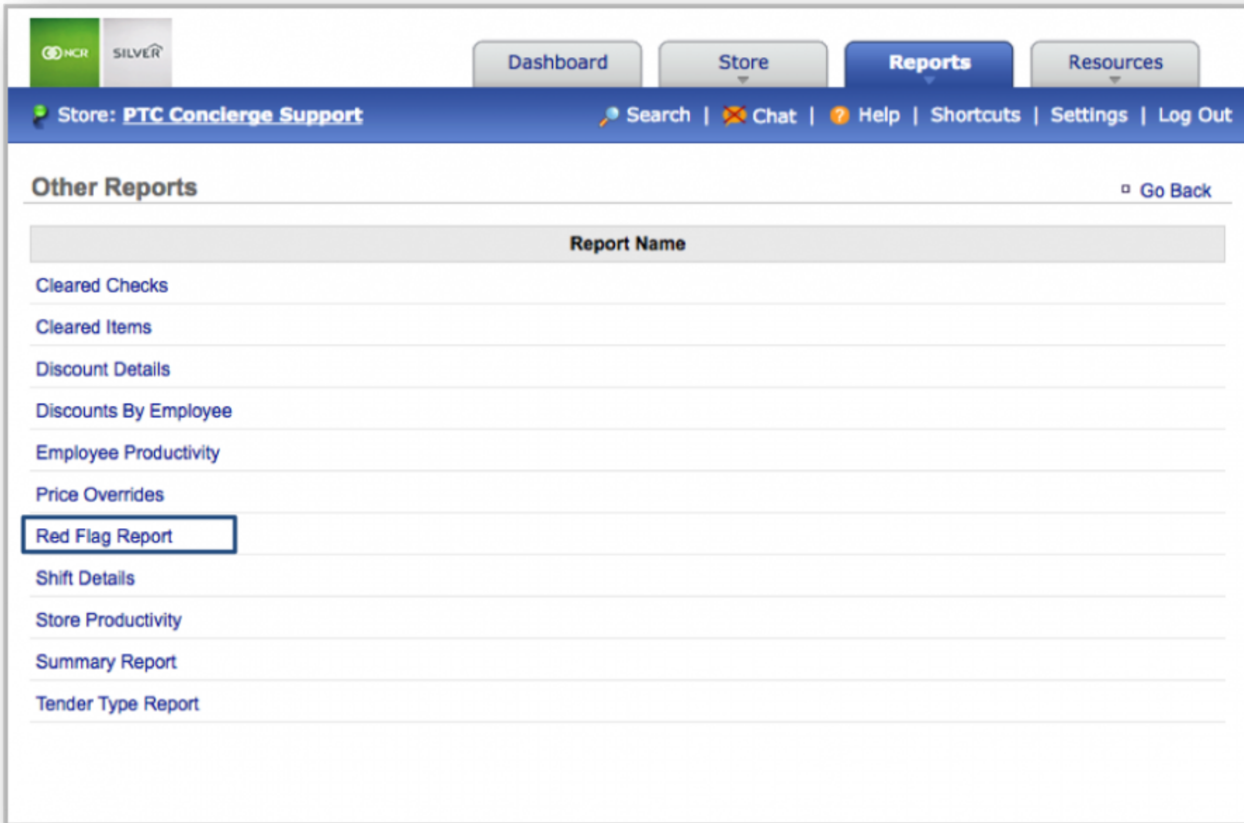
Red Flag Report

The purpose of this section is to showcase the Red Flag Report, which provides you with red flag data (including, but not limited to, average invoice amounts, discount quantities, discount amounts, cleared ticket information, refunds, etc…) for any date range you specify.

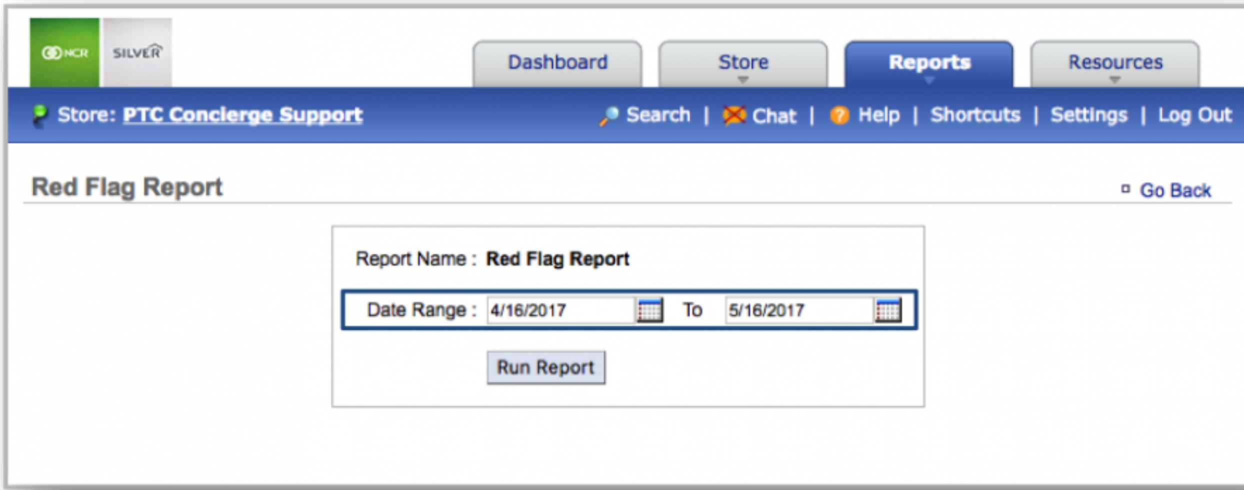
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Red Flag Report***.

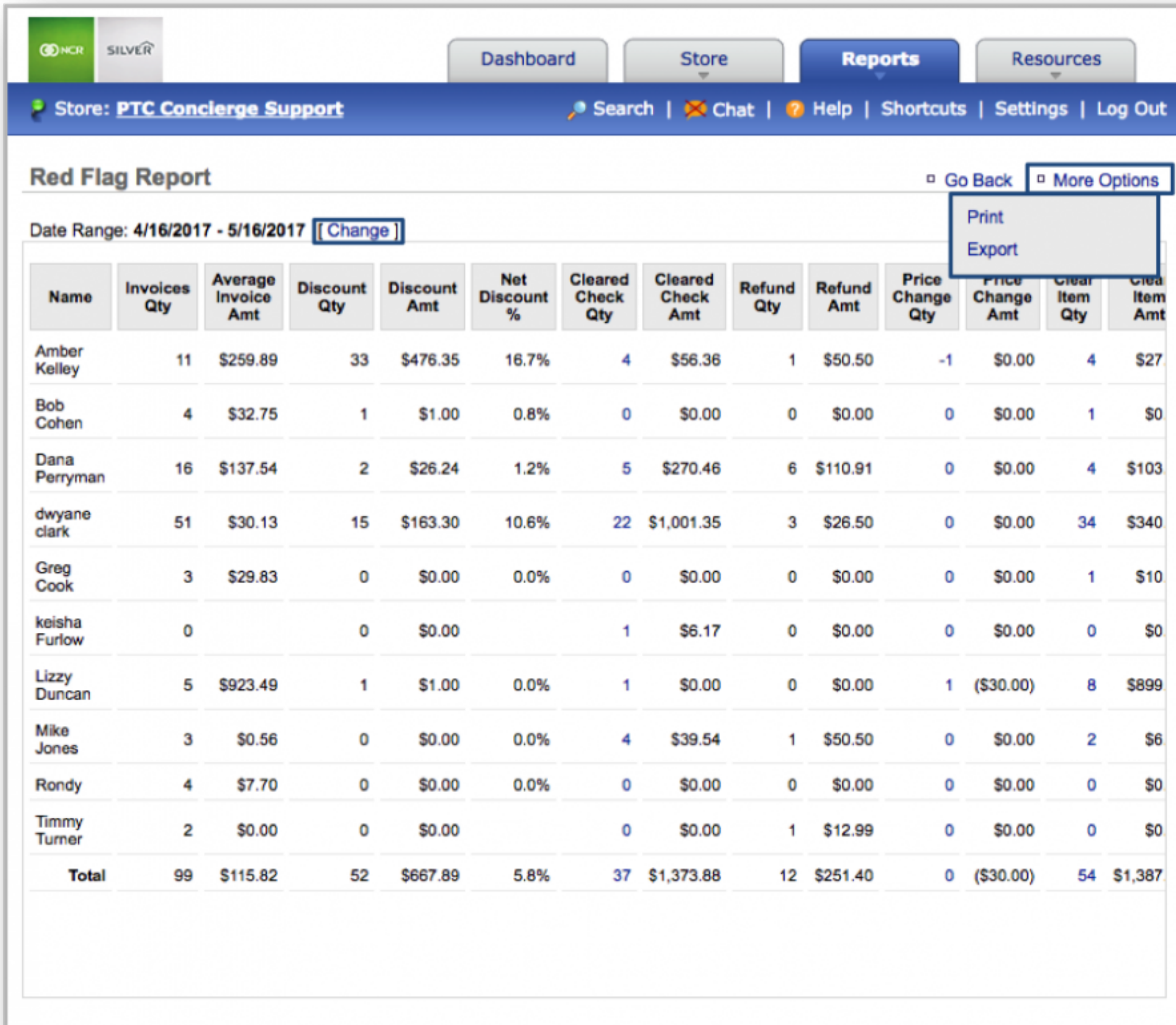


STEP 3: Select your preferred data range and click ***Run Report***.



Red Flag Report

Once the report is generated, employee names will be listed to the left, under *Name*. To the right are details associated with that employee (which include invoice, discount, cleared ticket, refund and price change information) for the date range you set.



Name	Invoices Qty	Average Invoice Amt	Discount Qty	Discount Amt	Net Discount %	Cleared Check Qty	Cleared Check Amt	Refund Qty	Refund Amt	Price Change Qty	Price Change Amt	Clear Item Qty	Clear Item Amt
Amber Kelley	11	$259.89	33	$476.35	16.7%	4	$56.36	1	$50.50	-1	$0.00	4	$27
Bob Cohen	4	$32.75	1	$1.00	0.8%	0	$0.00	0	$0.00	0	$0.00	1	$0
Dana Perryman	16	$137.54	2	$26.24	1.2%	5	$270.46	6	$110.91	0	$0.00	4	$103
dwyane clark	51	$30.13	15	$163.30	10.6%	22	$1,001.35	3	$26.50	0	$0.00	34	$340
Greg Cook	3	$29.83	0	$0.00	0.0%	0	$0.00	0	$0.00	0	$0.00	1	$10
keisha Furlow	0		0	$0.00		1	$6.17	0	$0.00	0	$0.00	0	$0
Lizzy Duncan	5	$923.49	1	$1.00	0.0%	1	$0.00	0	$0.00	1	($30.00)	8	$899
Mike Jones	3	$0.56	0	$0.00	0.0%	4	$39.54	1	$50.50	0	$0.00	2	$6
Rondy	4	$7.70	0	$0.00	0.0%	0	$0.00	0	$0.00	0	$0.00	0	$0
Timmy Turner	2	$0.00	0	$0.00		0	$0.00	1	$12.99	0	$0.00	0	$0
Total	99	$115.82	52	$667.89	5.8%	37	$1,373.88	12	$251.40	0	($30.00)	54	$1,387

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

Related Topics within Other Reports

Discount Details Report

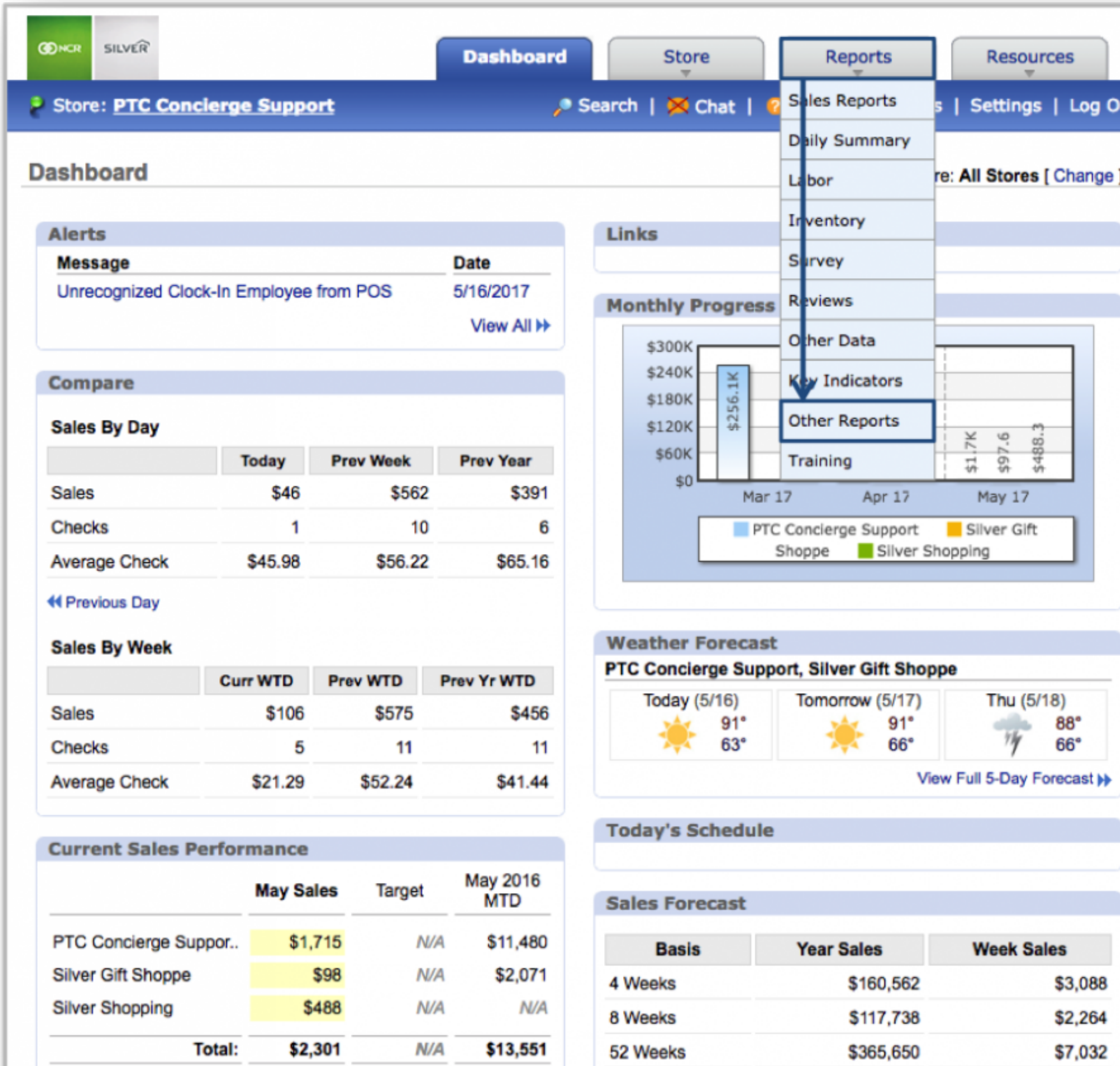
Discounts by Employee Report

[Employee Productivity Report]
[Shift Details Report]
[Store Productivity Report]
[Summary Report]
[Tender Type Report]

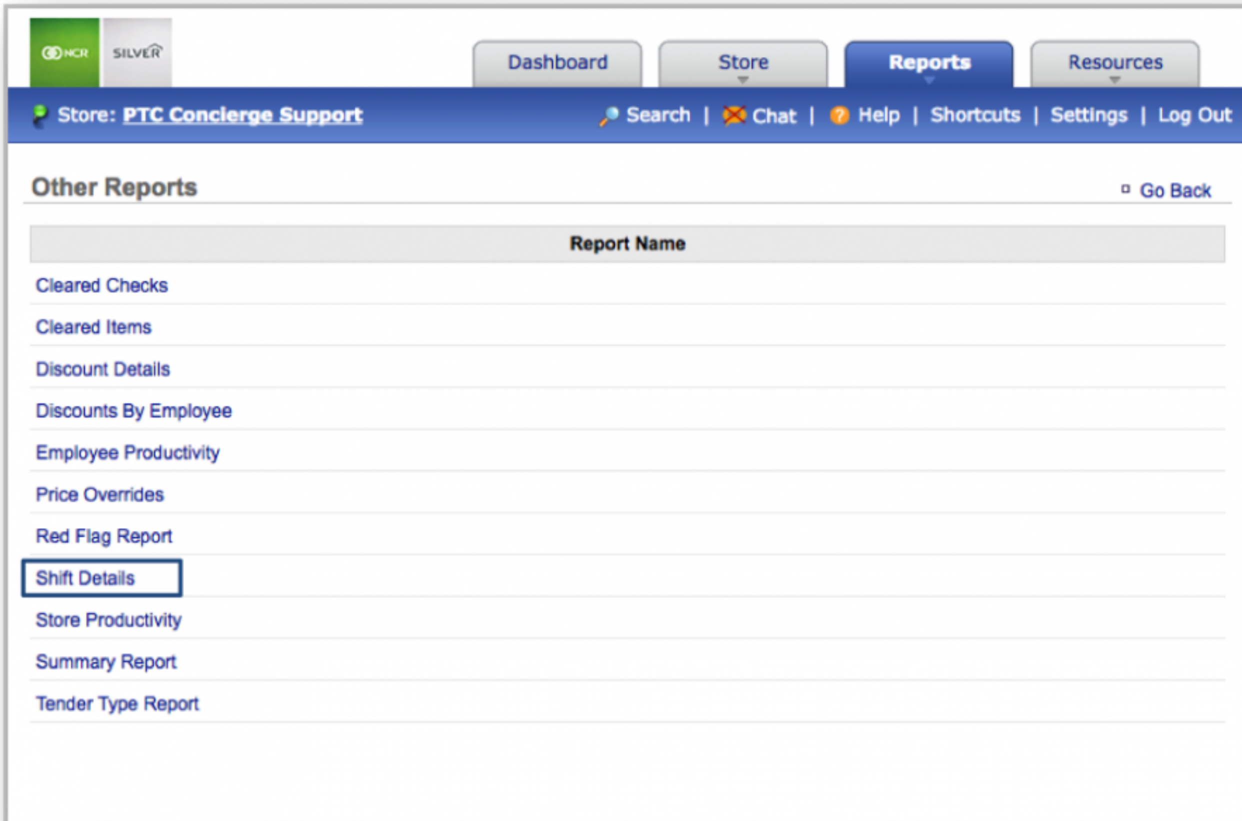
Shift Details Report

The purpose of this section is to showcase the Shift Details Report, which provides you with shift detail information (specifically, over/short amounts, pay in/pay out totals, and cash deposit information) for any date range you specify.

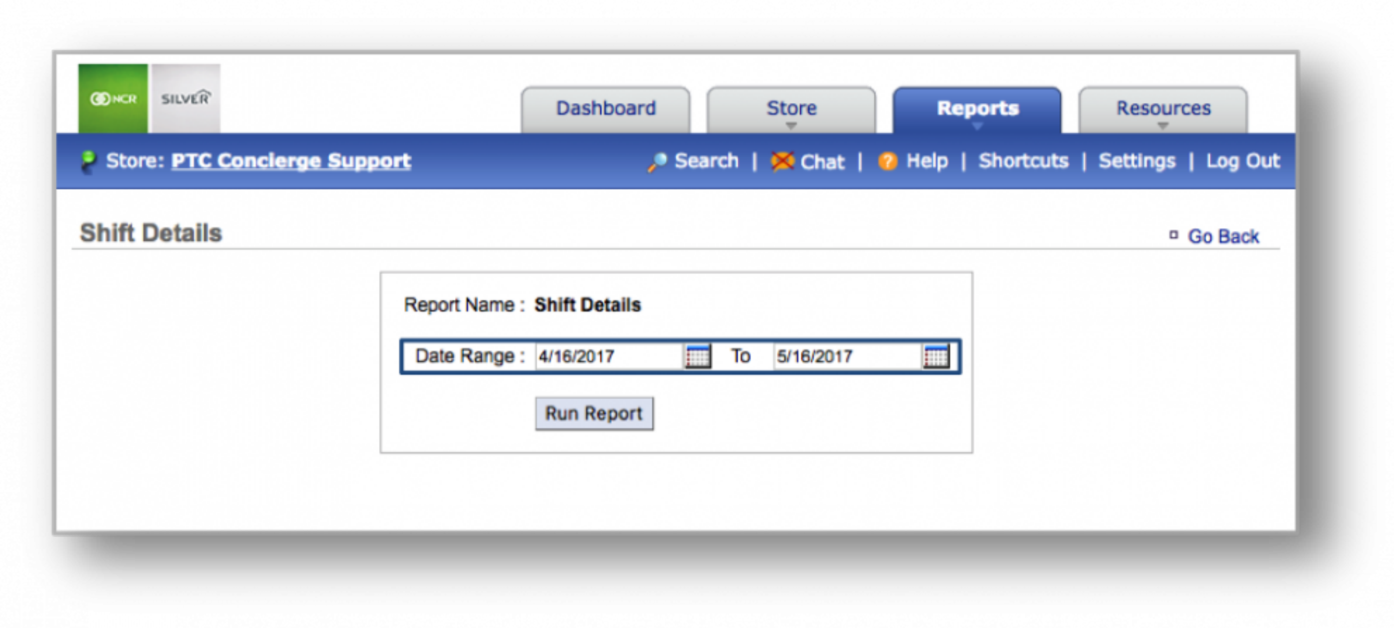
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Shift Details***.

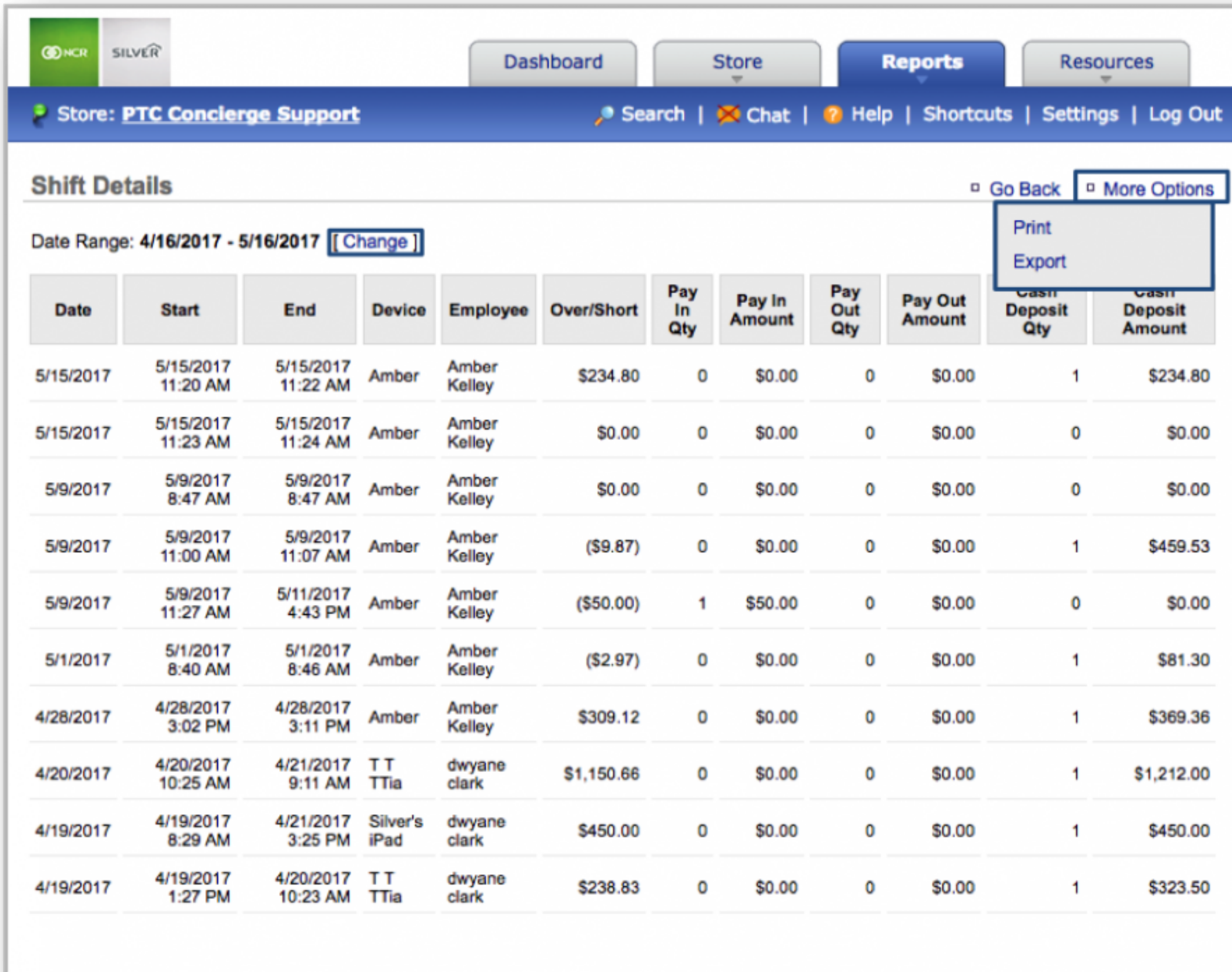


STEP 3: Select your preferred data range and click ***Run Report***.



Shift Details

Once the report is generated, shift times and employee names will be listed to the left of the screen. To the right are the shift details associated with each employee for the date range you set.



Date	Start	End	Device	Employee	Over/Short	Pay In Qty	Pay In Amount	Pay Out Qty	Pay Out Amount	Cash Deposit Qty	Cash Deposit Amount
5/15/2017	5/15/2017 11:20 AM	5/15/2017 11:22 AM	Amber	Amber Kelley	$234.80	0	$0.00	0	$0.00	1	$234.80
5/15/2017	5/15/2017 11:23 AM	5/15/2017 11:24 AM	Amber	Amber Kelley	$0.00	0	$0.00	0	$0.00	0	$0.00
5/9/2017	5/9/2017 8:47 AM	5/9/2017 8:47 AM	Amber	Amber Kelley	$0.00	0	$0.00	0	$0.00	0	$0.00
5/9/2017	5/9/2017 11:00 AM	5/9/2017 11:07 AM	Amber	Amber Kelley	($9.87)	0	$0.00	0	$0.00	1	$459.53
5/9/2017	5/9/2017 11:27 AM	5/11/2017 4:43 PM	Amber	Amber Kelley	($50.00)	1	$50.00	0	$0.00	0	$0.00
5/1/2017	5/1/2017 8:40 AM	5/1/2017 8:46 AM	Amber	Amber Kelley	($2.97)	0	$0.00	0	$0.00	1	$81.30
4/28/2017	4/28/2017 3:02 PM	4/28/2017 3:11 PM	Amber	Amber Kelley	$309.12	0	$0.00	0	$0.00	1	$369.36
4/20/2017	4/20/2017 10:25 AM	4/21/2017 9:11 AM	T T TTia	dwyane clark	$1,150.66	0	$0.00	0	$0.00	1	$1,212.00
4/19/2017	4/19/2017 8:29 AM	4/21/2017 3:25 PM	Silver's iPad	dwyane clark	$450.00	0	$0.00	0	$0.00	1	$450.00
4/19/2017	4/19/2017 1:27 PM	4/20/2017 10:23 AM	T T TTia	dwyane clark	$238.83	0	$0.00	0	$0.00	1	$323.50

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

Related Topics within Other Reports

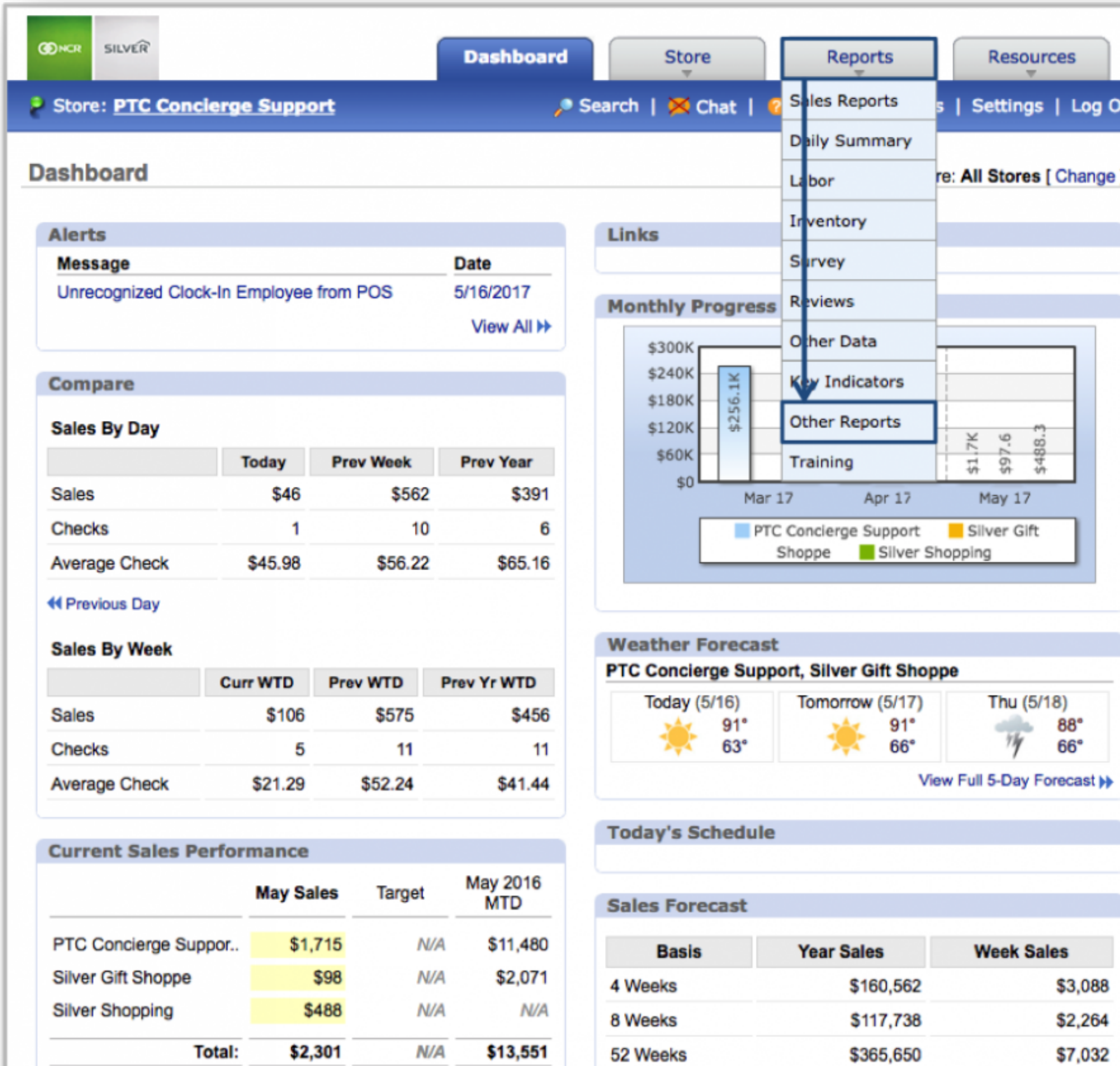
[Discount Details Report]
[Discounts by Employee Report]
[Employee Productivity Report]
[Red Flag Report]

[Store Productivity Report]
[Summary Report]
[Tender Type Report]

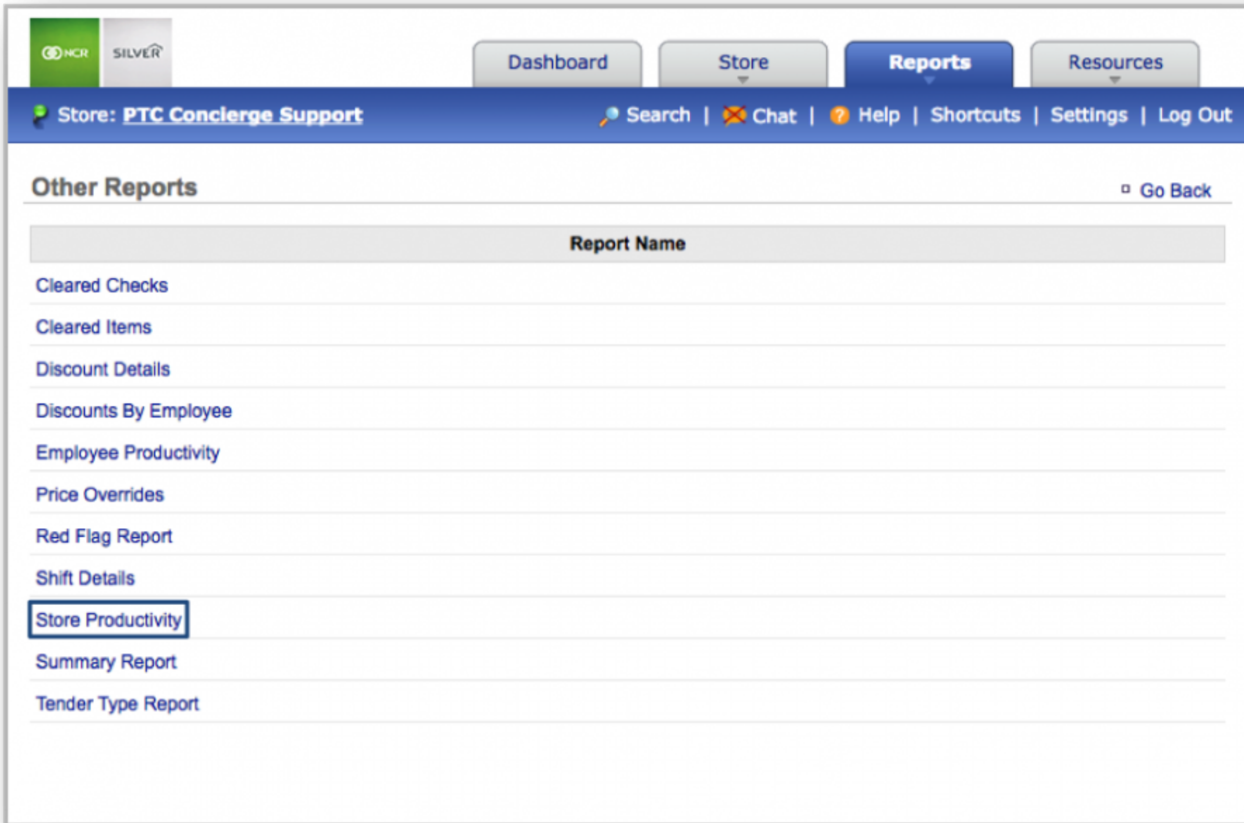
Store Productivity Report

The purpose of this section is to showcase the Store Productivity Report, which provides you with each day's store productivity (measured by net sales divided by hours worked) for any date range you specify.

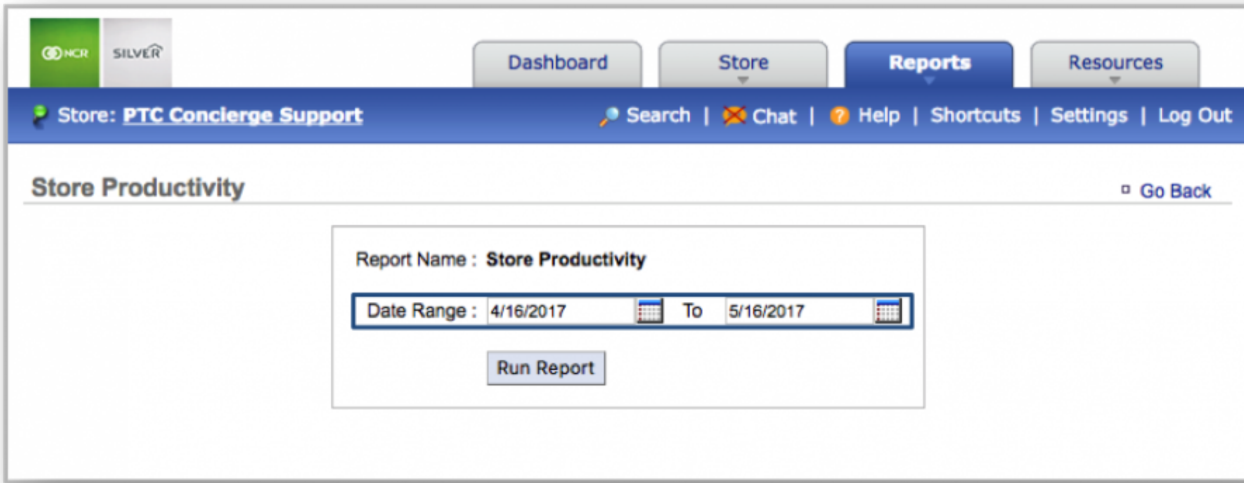
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Store Productivity***.

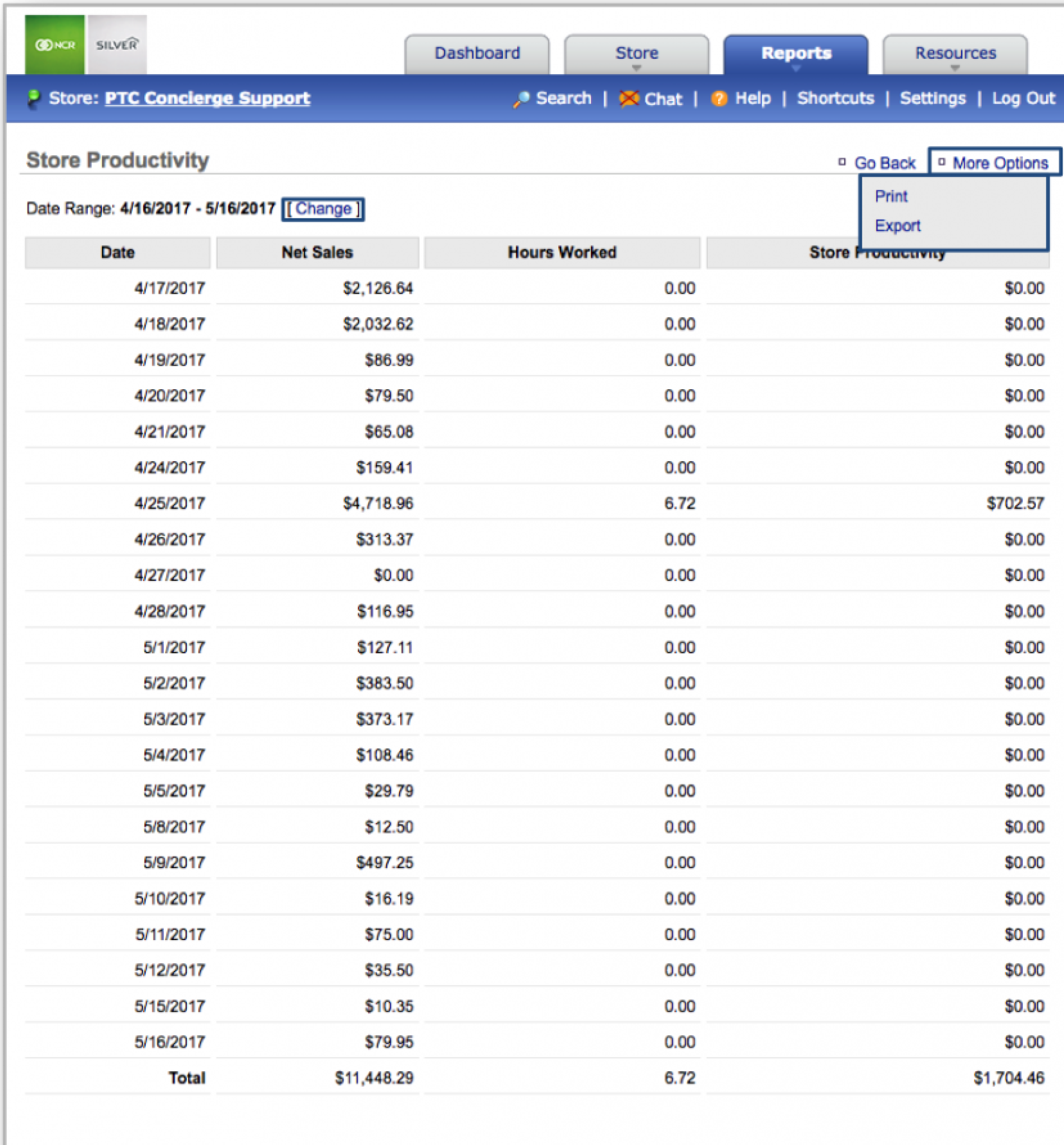


STEP 3: Select your preferred data range and click ***Run Report***.



Store Productivity

Once the report is generated, you will see each day's net sales, hours worked, and the store productivity(net sales divided by hours worked).



Date	Net Sales	Hours Worked	Store Productivity
4/17/2017	$2,126.64	0.00	$0.00
4/18/2017	$2,032.62	0.00	$0.00
4/19/2017	$86.99	0.00	$0.00
4/20/2017	$79.50	0.00	$0.00
4/21/2017	$65.08	0.00	$0.00
4/24/2017	$159.41	0.00	$0.00
4/25/2017	$4,718.96	6.72	$702.57
4/26/2017	$313.37	0.00	$0.00
4/27/2017	$0.00	0.00	$0.00
4/28/2017	$116.95	0.00	$0.00
5/1/2017	$127.11	0.00	$0.00
5/2/2017	$383.50	0.00	$0.00
5/3/2017	$373.17	0.00	$0.00
5/4/2017	$108.46	0.00	$0.00
5/5/2017	$29.79	0.00	$0.00
5/8/2017	$12.50	0.00	$0.00
5/9/2017	$497.25	0.00	$0.00
5/10/2017	$16.19	0.00	$0.00
5/11/2017	$75.00	0.00	$0.00
5/12/2017	$35.50	0.00	$0.00
5/15/2017	$10.35	0.00	$0.00
5/16/2017	$79.95	0.00	$0.00
Total	$11,448.29	6.72	$1,704.46

✻ **Hint:** You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

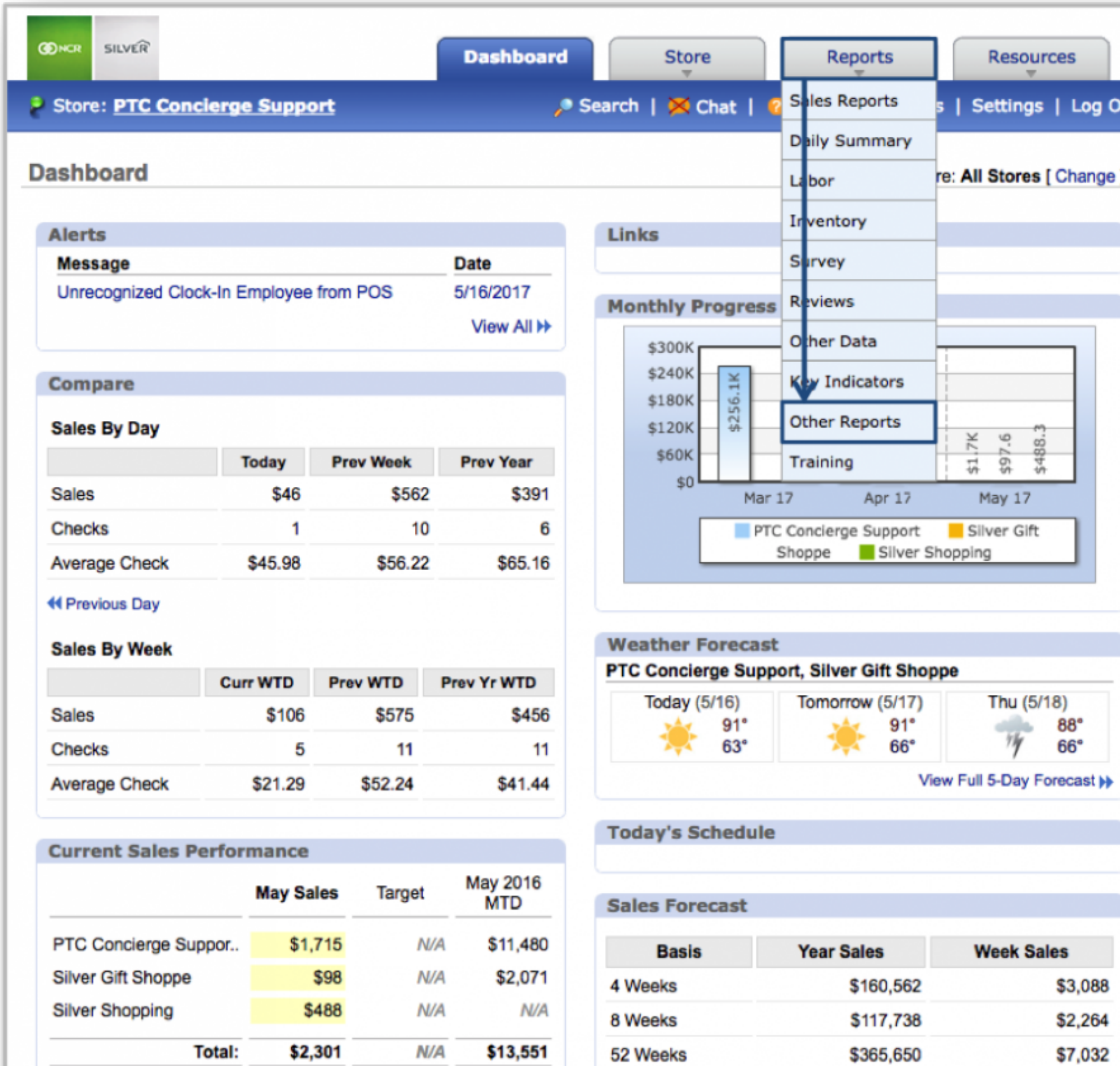
Related Topics within Other Reports

Discount Details Report
Discounts by Employee Report
Employee Productivity Report
Red Flag Report
Shift Details Report
Summary Report
Tender Type Report

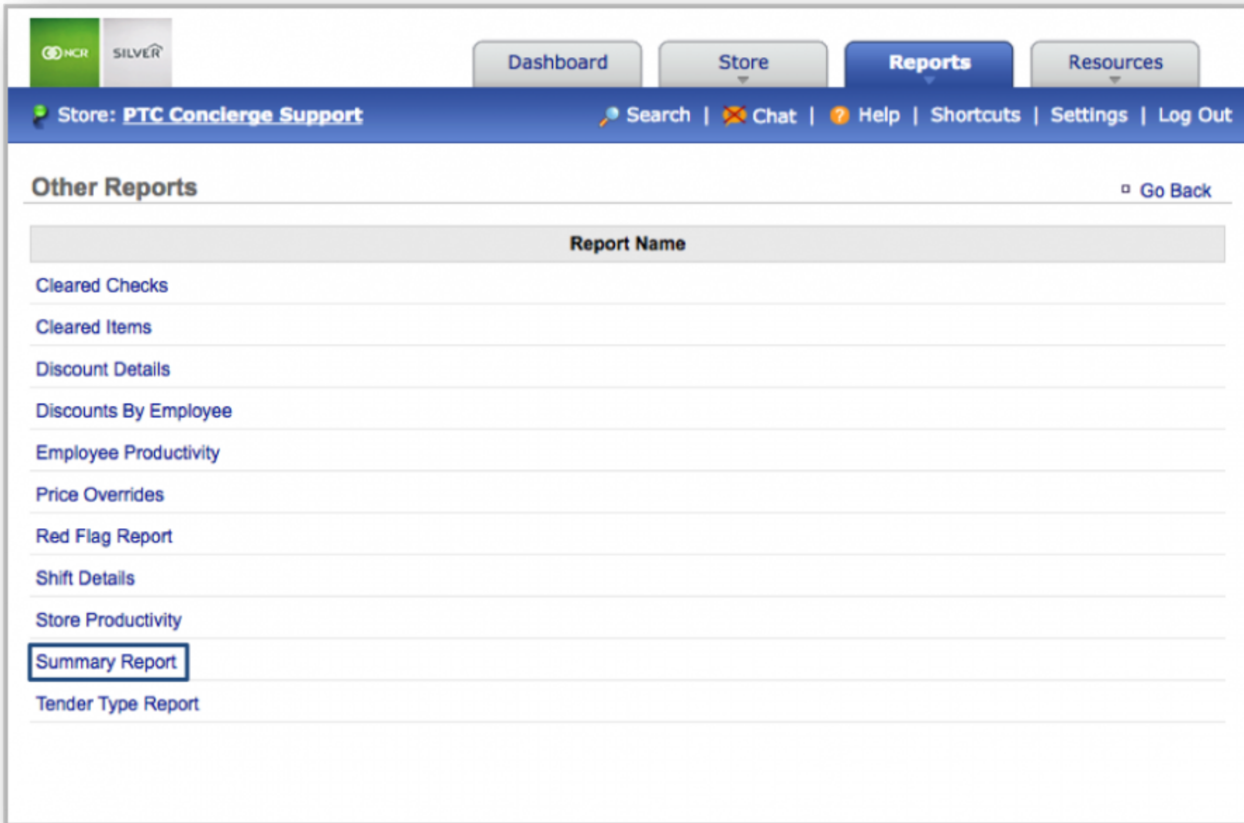
Summary Report

The purpose of this section is to showcase the Summary Report, which provides you with a summary of key sales and labor metrics, for any date range you specify.

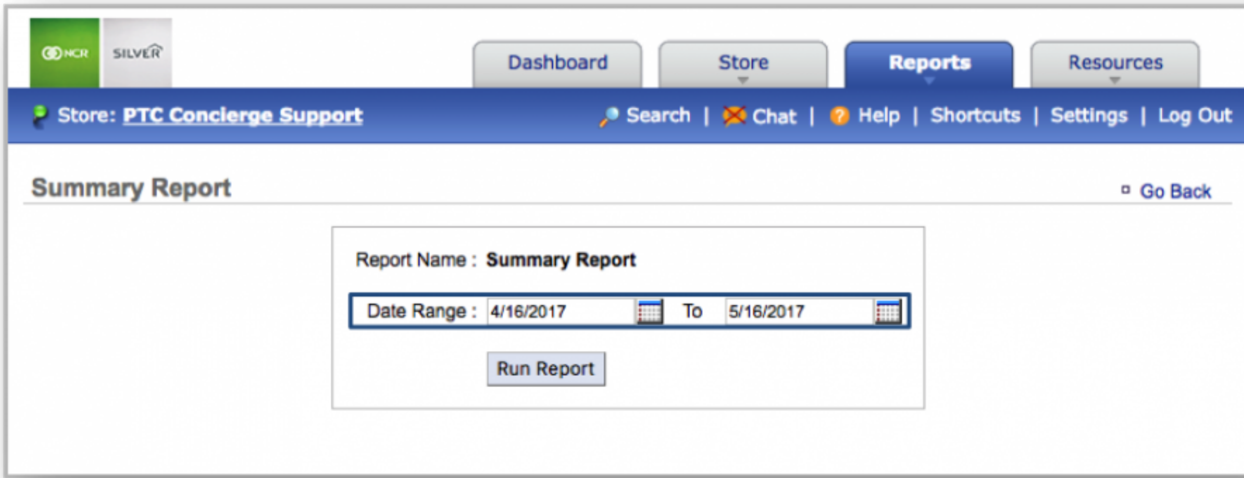
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Summary Report***.



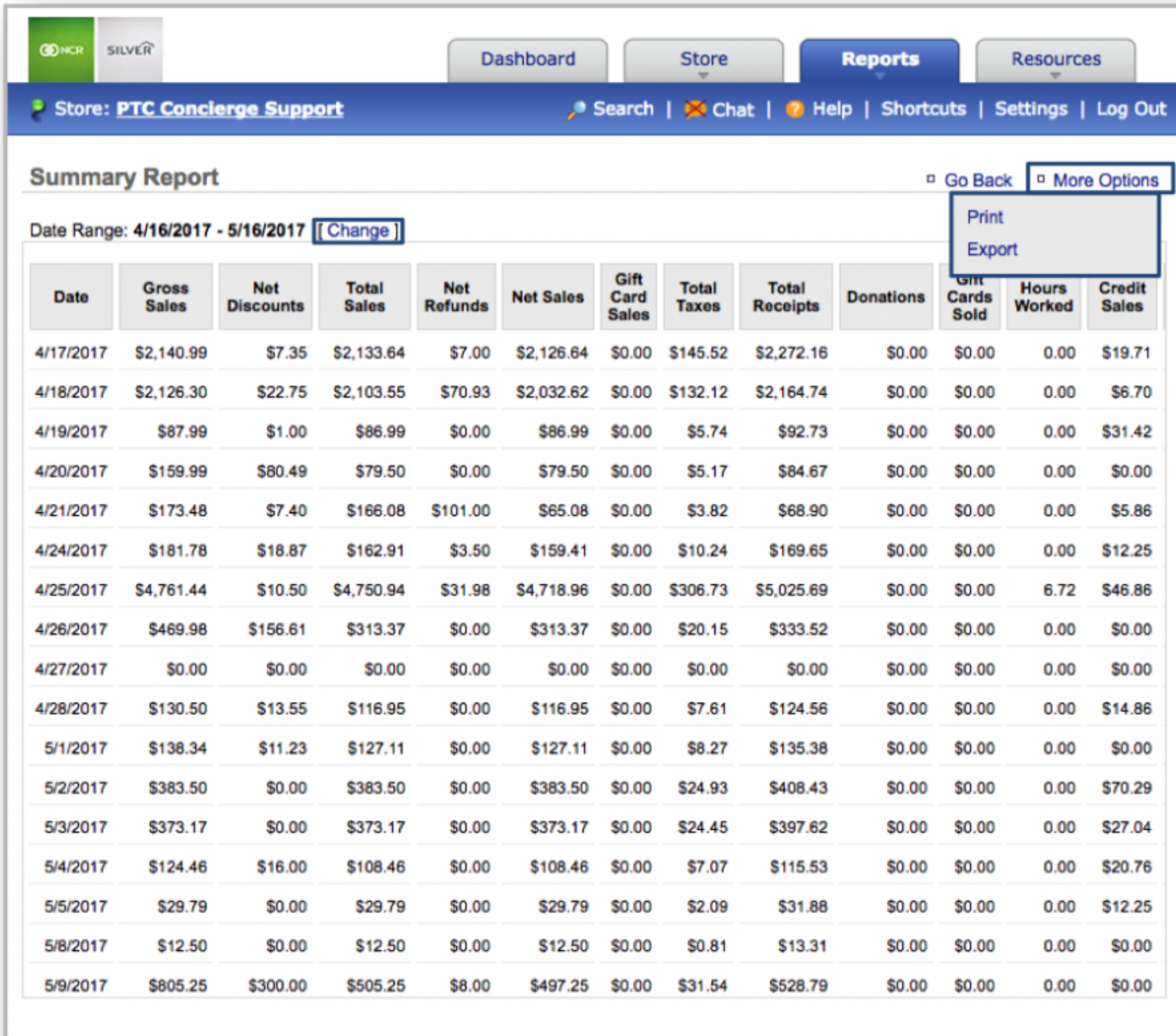
STEP 3: Select your preferred data range and click ***Run Report***.



Summary Report

Once the report is generated, each day will be broken down to show several key data points (including but not limited to, Gross Sales, Net Discounts, Total Sales, Net Refunds, Net Sales, Gift Card Sales, Labor

Hours, etc…).



Summary Report

Date Range: **4/16/2017 - 5/16/2017** [Change]

Date	Gross Sales	Net Discounts	Total Sales	Net Refunds	Net Sales	Gift Card Sales	Total Taxes	Total Receipts	Donations	Gift Cards Sold	Hours Worked	Credit Sales
4/17/2017	$2,140.99	$7.35	$2,133.64	$7.00	$2,126.64	$0.00	$145.52	$2,272.16	$0.00	$0.00	0.00	$19.71
4/18/2017	$2,126.30	$22.75	$2,103.55	$70.93	$2,032.62	$0.00	$132.12	$2,164.74	$0.00	$0.00	0.00	$6.70
4/19/2017	$87.99	$1.00	$86.99	$0.00	$86.99	$0.00	$5.74	$92.73	$0.00	$0.00	0.00	$31.42
4/20/2017	$159.99	$80.49	$79.50	$0.00	$79.50	$0.00	$5.17	$84.67	$0.00	$0.00	0.00	$0.00
4/21/2017	$173.48	$7.40	$166.08	$101.00	$65.08	$0.00	$3.82	$68.90	$0.00	$0.00	0.00	$5.86
4/24/2017	$181.78	$18.87	$162.91	$3.50	$159.41	$0.00	$10.24	$169.65	$0.00	$0.00	0.00	$12.25
4/25/2017	$4,761.44	$10.50	$4,750.94	$31.98	$4,718.96	$0.00	$306.73	$5,025.69	$0.00	$0.00	6.72	$46.86
4/26/2017	$469.98	$156.61	$313.37	$0.00	$313.37	$0.00	$20.15	$333.52	$0.00	$0.00	0.00	$0.00
4/27/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	$0.00
4/28/2017	$130.50	$13.55	$116.95	$0.00	$116.95	$0.00	$7.61	$124.56	$0.00	$0.00	0.00	$14.86
5/1/2017	$138.34	$11.23	$127.11	$0.00	$127.11	$0.00	$8.27	$135.38	$0.00	$0.00	0.00	$0.00
5/2/2017	$383.50	$0.00	$383.50	$0.00	$383.50	$0.00	$24.93	$408.43	$0.00	$0.00	0.00	$70.29
5/3/2017	$373.17	$0.00	$373.17	$0.00	$373.17	$0.00	$24.45	$397.62	$0.00	$0.00	0.00	$27.04
5/4/2017	$124.46	$16.00	$108.46	$0.00	$108.46	$0.00	$7.07	$115.53	$0.00	$0.00	0.00	$20.76
5/5/2017	$29.79	$0.00	$29.79	$0.00	$29.79	$0.00	$2.09	$31.88	$0.00	$0.00	0.00	$12.25
5/8/2017	$12.50	$0.00	$12.50	$0.00	$12.50	$0.00	$0.81	$13.31	$0.00	$0.00	0.00	$0.00
5/9/2017	$805.25	$300.00	$505.25	$8.00	$497.25	$0.00	$31.54	$528.79	$0.00	$0.00	0.00	$0.00

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

Related Topics within Other Reports

[Discount Details Report]

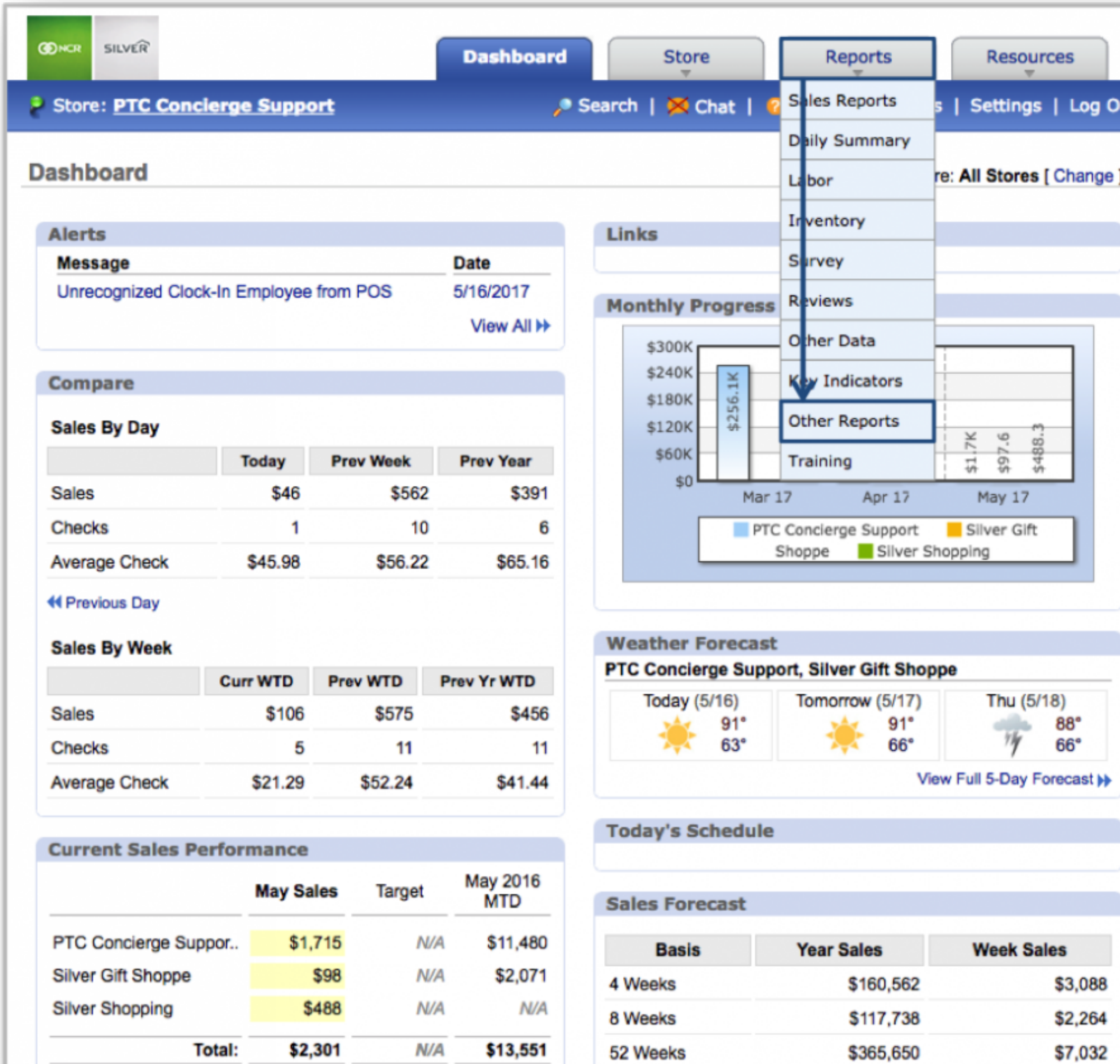
[Discounts by Employee Report]

[**Employee Productivity Report**]
[**Red Flag Report**]
[**Shift Details Report**]
[**Store Productivity Report**]
[**Tender Type Report**]

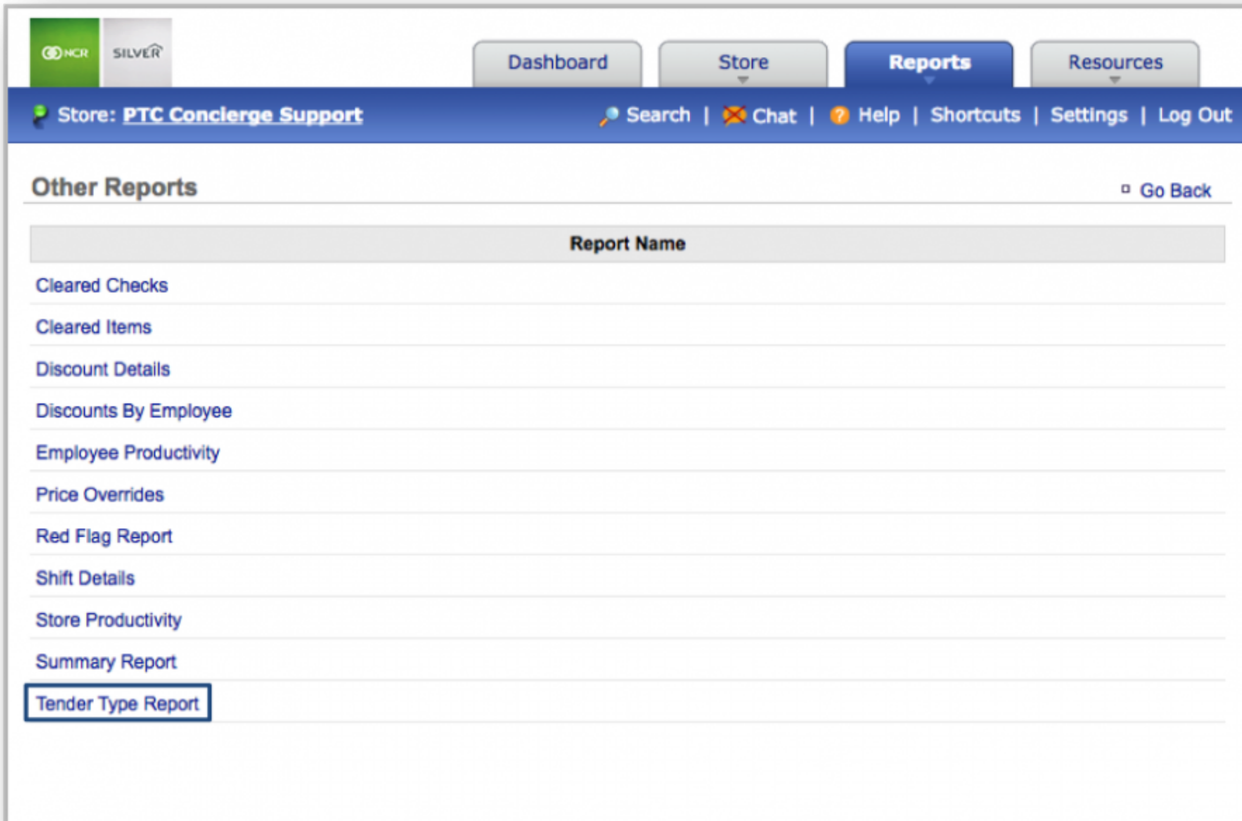
Tender Type Report

The purpose of this section is to showcase the Tender Type Report, which provides you with a breakdown of tender types for each day's sales, for any date range you specify.

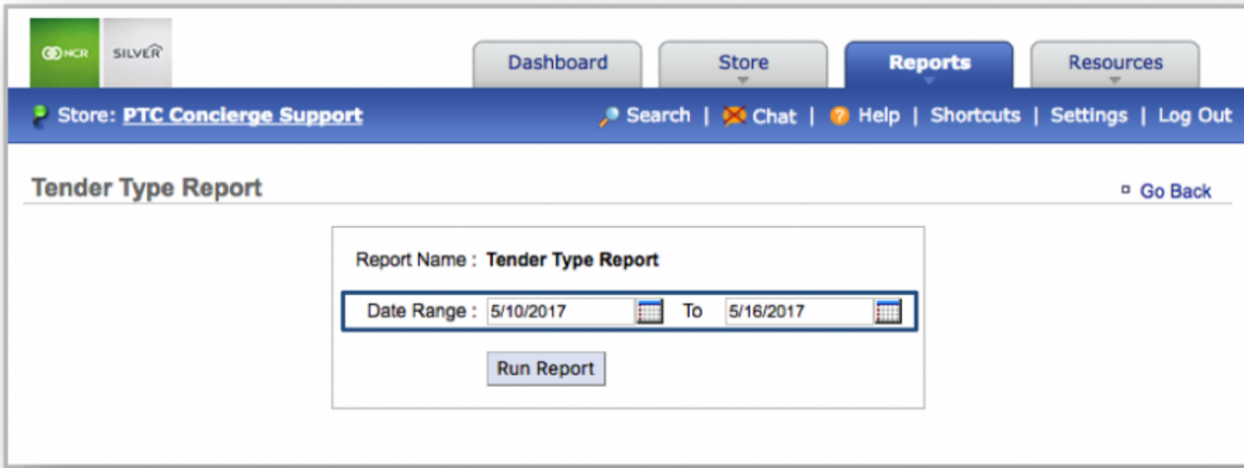
STEP 1: From your Dashboard view, mouse over the ***Reports*** tab and click ***Other Reports***.



STEP 2: Within ***Other Reports***, click ***Tender Type Report***.

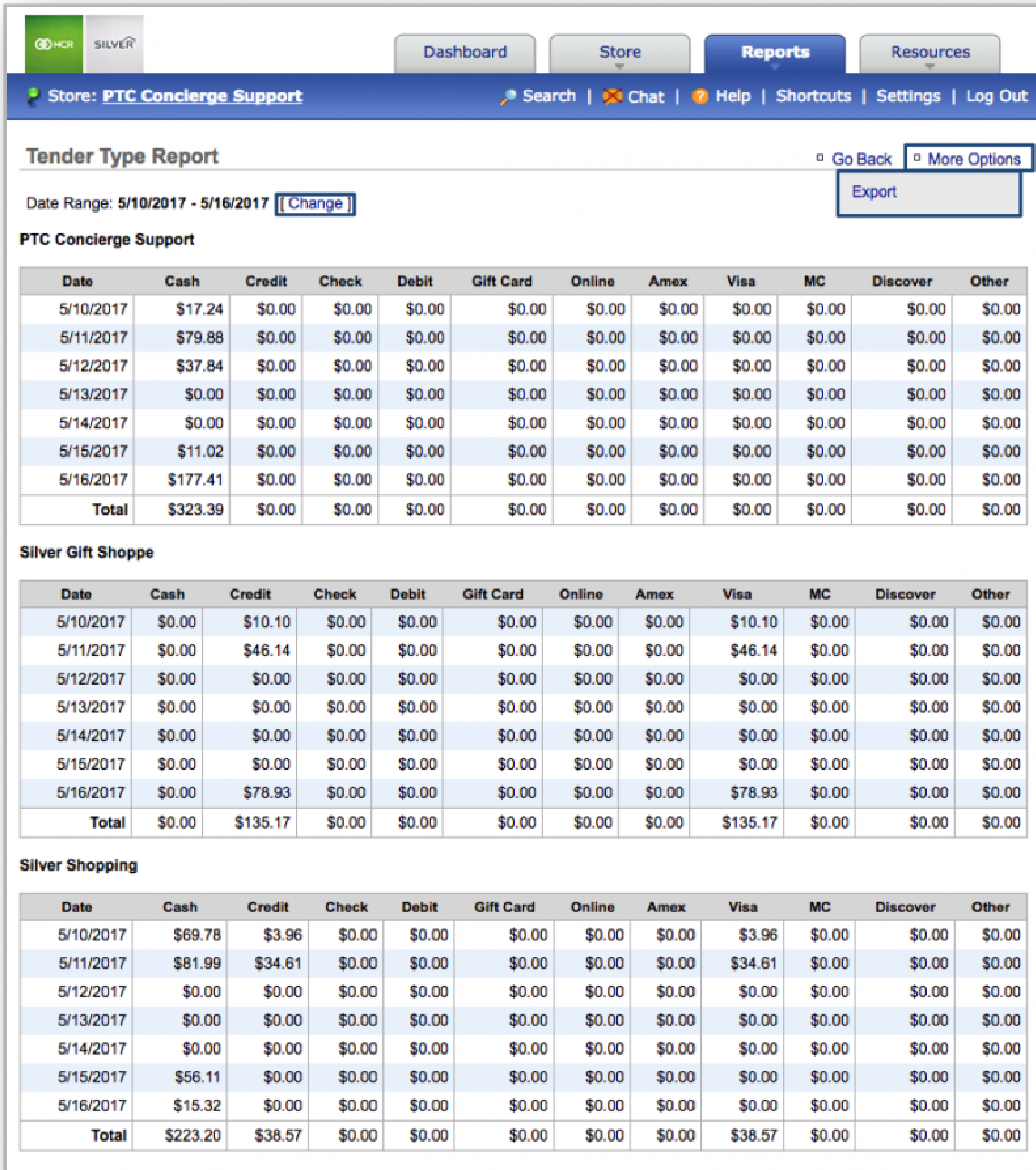


STEP 3: Select your preferred data range and click ***Run Report***.



Tender Type Report

Once the report is generated, each day will be broken down to show tender types for each day, over the date range you set.



Tender Type Report

Date Range: **5/10/2017 - 5/16/2017** [Change]

PTC Concierge Support

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	$17.24	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/11/2017	$79.88	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/12/2017	$37.84	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/13/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/14/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/15/2017	$11.02	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/16/2017	$177.41	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$323.39	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

Silver Gift Shoppe

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	$0.00	$10.10	$0.00	$0.00	$0.00	$0.00	$0.00	$10.10	$0.00	$0.00	$0.00
5/11/2017	$0.00	$46.14	$0.00	$0.00	$0.00	$0.00	$0.00	$46.14	$0.00	$0.00	$0.00
5/12/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/13/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/14/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/15/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/16/2017	$0.00	$78.93	$0.00	$0.00	$0.00	$0.00	$0.00	$78.93	$0.00	$0.00	$0.00
Total	$0.00	$135.17	$0.00	$0.00	$0.00	$0.00	$0.00	$135.17	$0.00	$0.00	$0.00

Silver Shopping

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	$69.78	$3.96	$0.00	$0.00	$0.00	$0.00	$0.00	$3.96	$0.00	$0.00	$0.00
5/11/2017	$81.99	$34.61	$0.00	$0.00	$0.00	$0.00	$0.00	$34.61	$0.00	$0.00	$0.00
5/12/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/13/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/14/2017	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/15/2017	$56.11	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5/16/2017	$15.32	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$223.20	$38.57	$0.00	$0.00	$0.00	$0.00	$0.00	$38.57	$0.00	$0.00	$0.00

Hint: You can change your date range from a generated report by clicking ***Change*** to the right of ***Date Range***.
Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export***.

Related Topics within Other Reports

Discount Details Report

Discounts by Employee Report

Employee Productivity Report

Red Flag Report

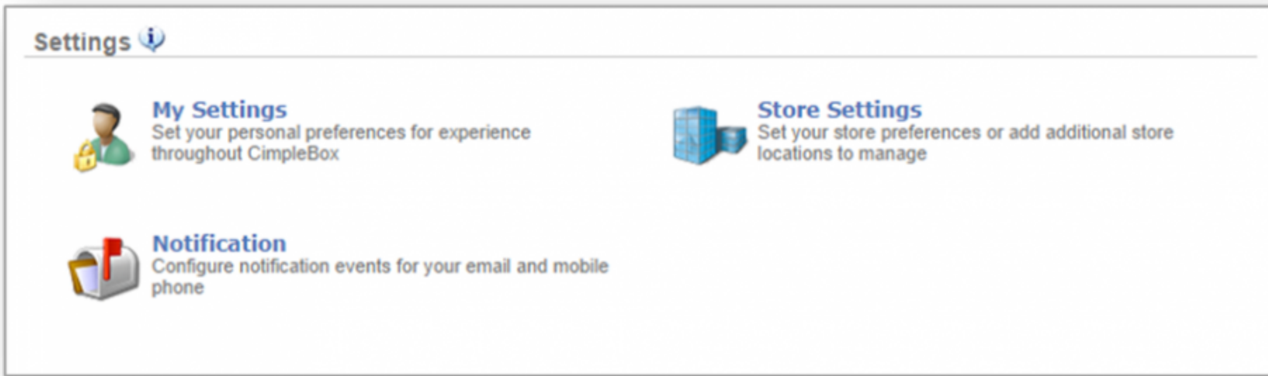
Shift Details Report

Store Productivity Report

Summary Report

Settings

This section will illustrate how to manage your personal, store and notification settings. Click on a topic below for more information.



Personal Settings
Change Password
General Information
Time Zone

Store Settings
General Settings
Integration

Notification
Notification Settings

Personal Settings

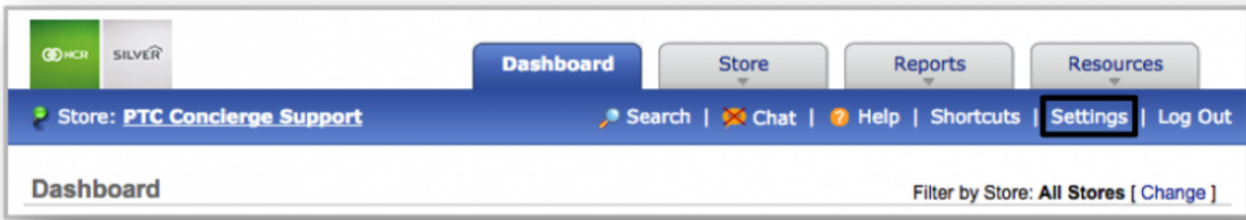
The purpose of this section is to illustrate how to change your password, modify general information, and adjust the time zone for your location. Click a topic below for more information.

Change Password

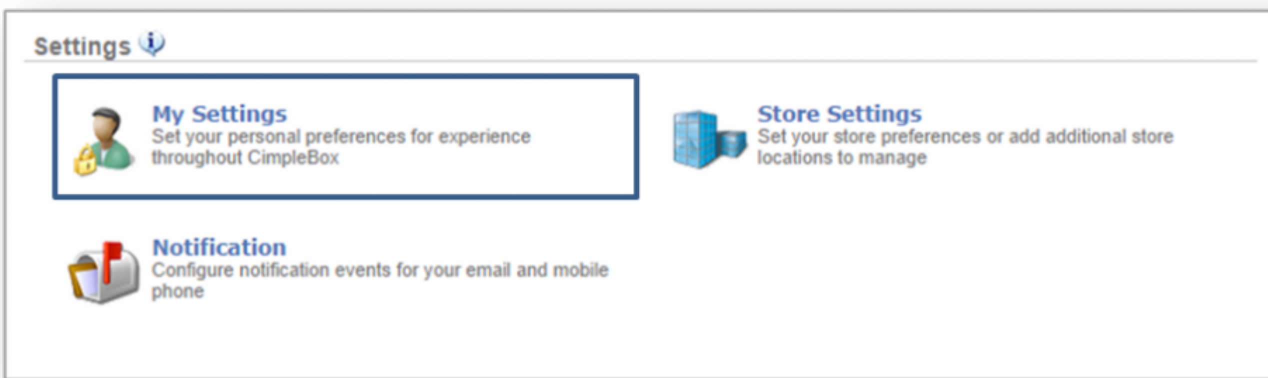
The purpose of this section is to illustrate how to change your CimpleBox password.

Change Password

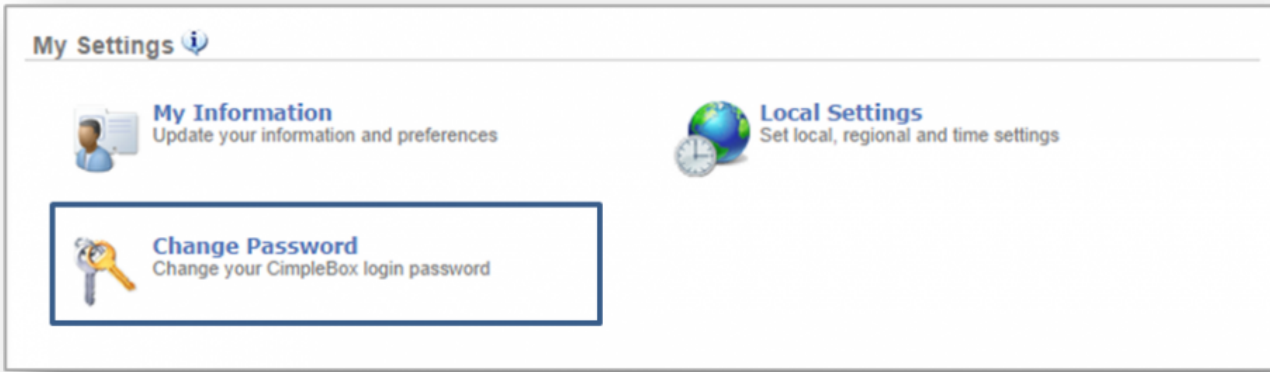
STEP 1: From your Dashboard view, mouse over to, and click, ***Settings***.



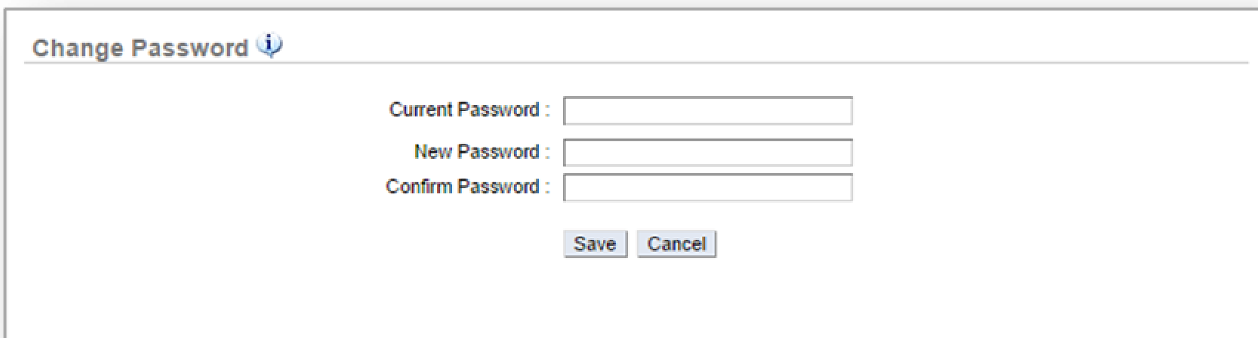
STEP 2: From the *Settings* screen, click ***My Settings***.



STEP 3: From the *My Settings* screen, click ***Change Password***.



STEP 4: Enter a current password and a new password. Confirm password and click ***Save***.



Related Topics

[General Information]

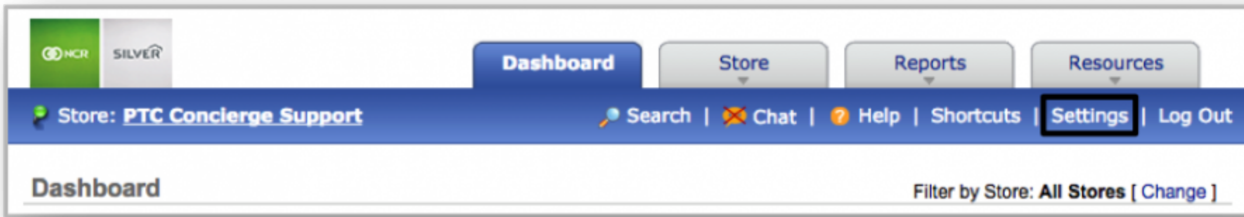
[Time Zone]

General Information

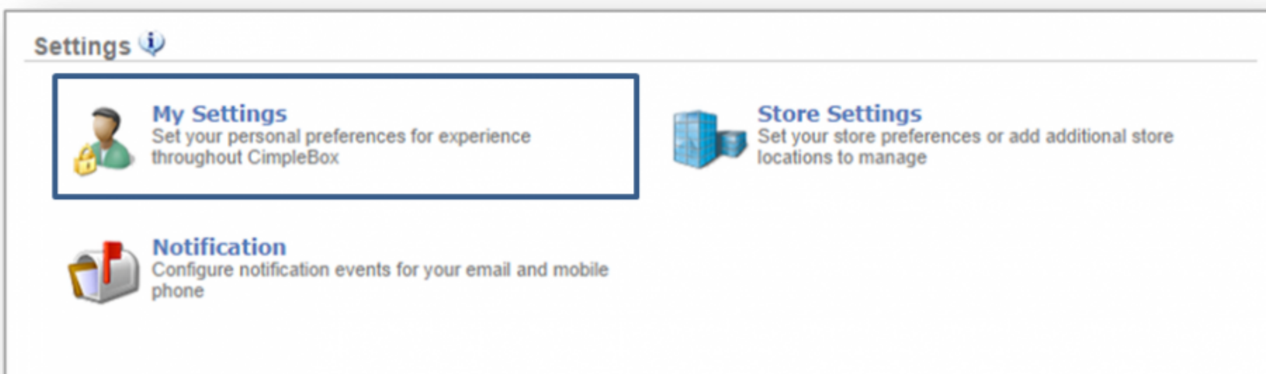
The purpose of this section is to illustrate how to adjust general information.

Adjust General Information

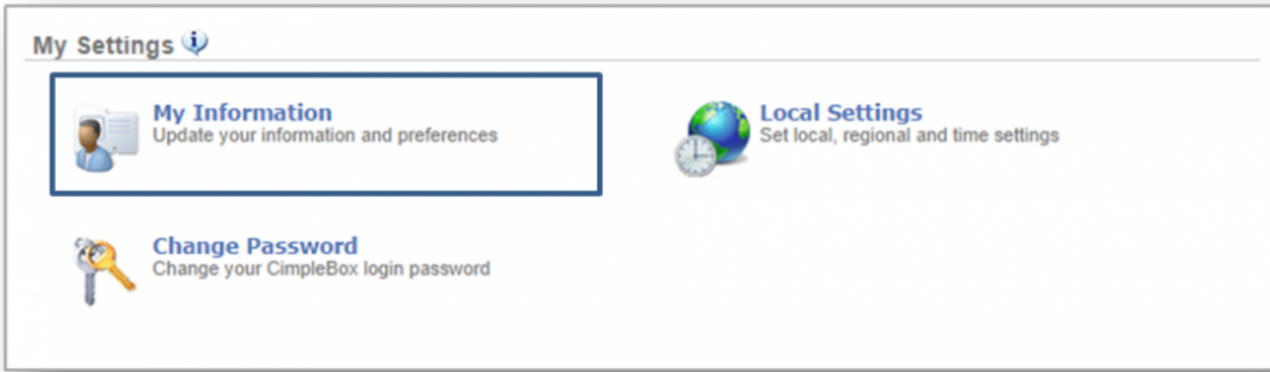
STEP 1: From your Dashboard view, mouse over to, and click, ***Settings***.



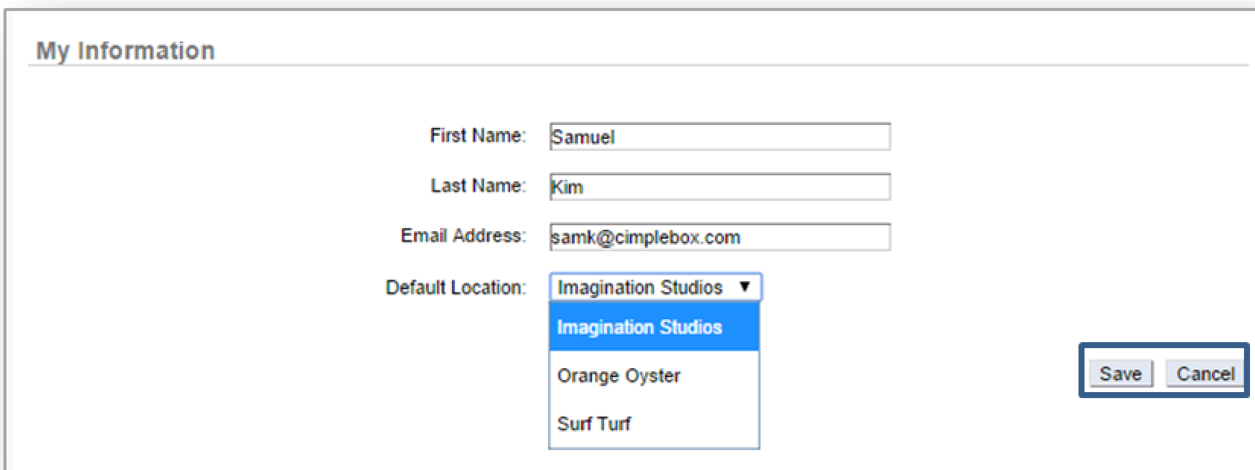
STEP 2: From the *Settings* screen, click ***My Settings***.



STEP 3: From the *My Settings* screen, click ***My Information***.



STEP 4: Adjust desired information, select your default location and click ***Save***.



Related Topics

[Change Password]

[General Information]

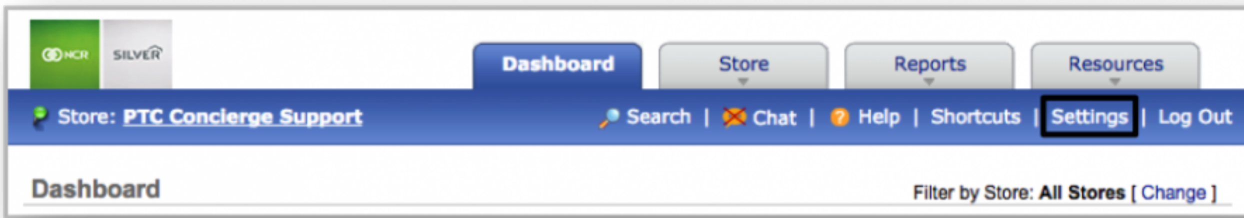
[Time Zone]

Time Zone

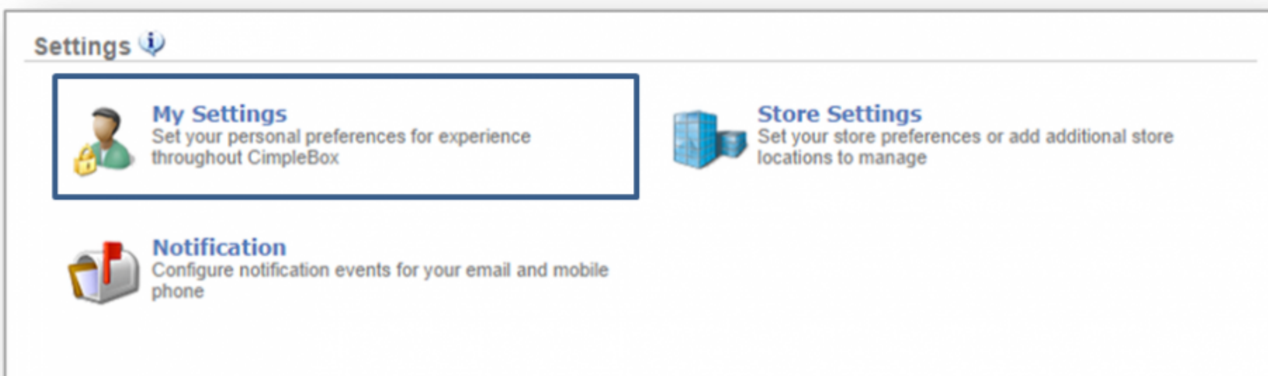
The purpose of this section is to illustrate how to manage time zone information for your location.

Manage Time Zone Information

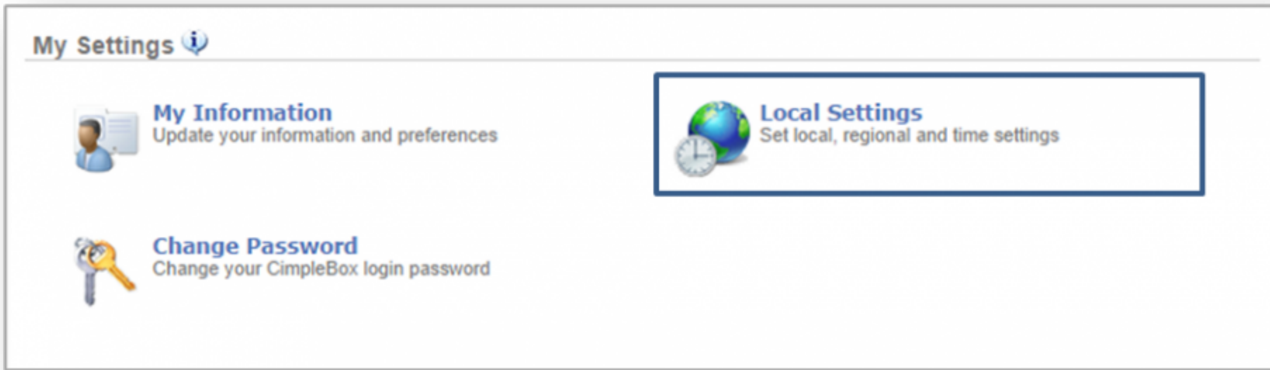
STEP 1: From your Dashboard view, mouse over to, and click, ***Settings***.



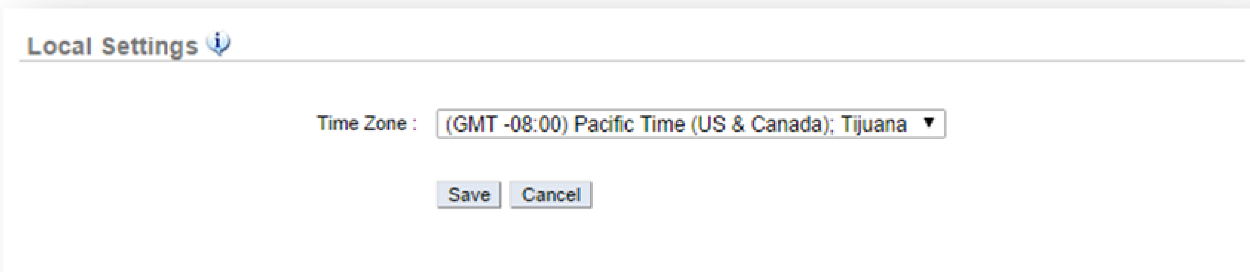
STEP 2: From the *Settings* screen, click ***My Settings***.



STEP 3: From the *My Settings* screen, click ***Local Settings***.



STEP 4: Select the time zone for your location and click ***Save***.



Related Topics

[Change Password]

[General Information]

Store Settings

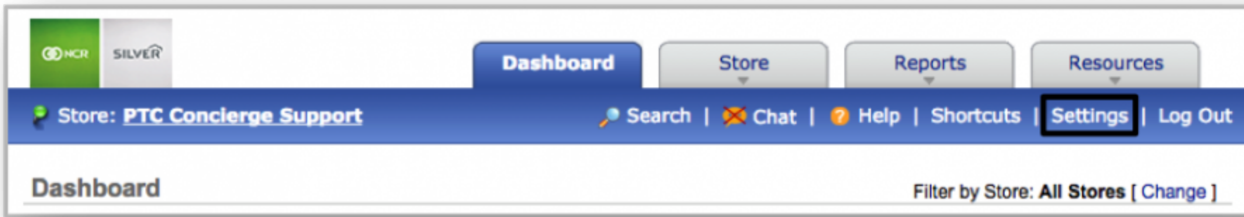
The purpose of this section is to illustrate how to change manage general information and the integration of information for your location(s). Click a topic below for more information.

General Settings

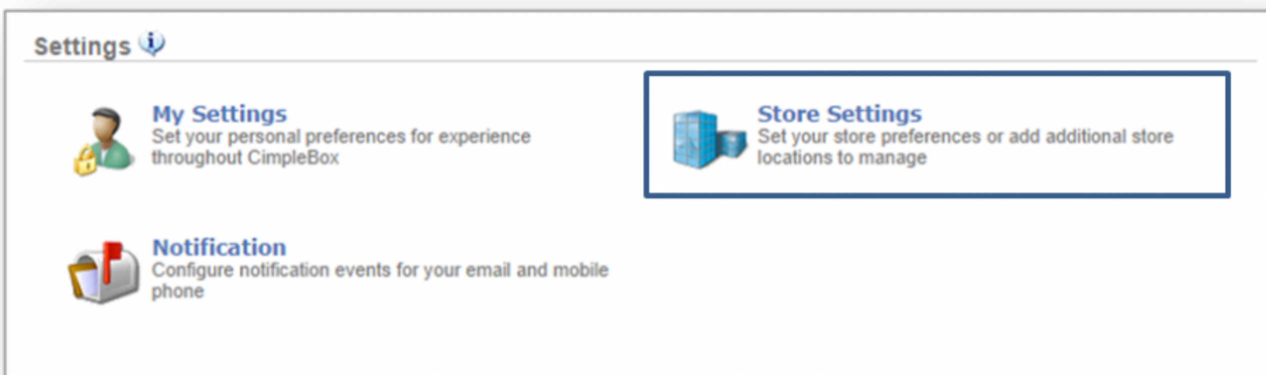
The purpose of this section is to illustrate how to manage general information for your location.

General Information

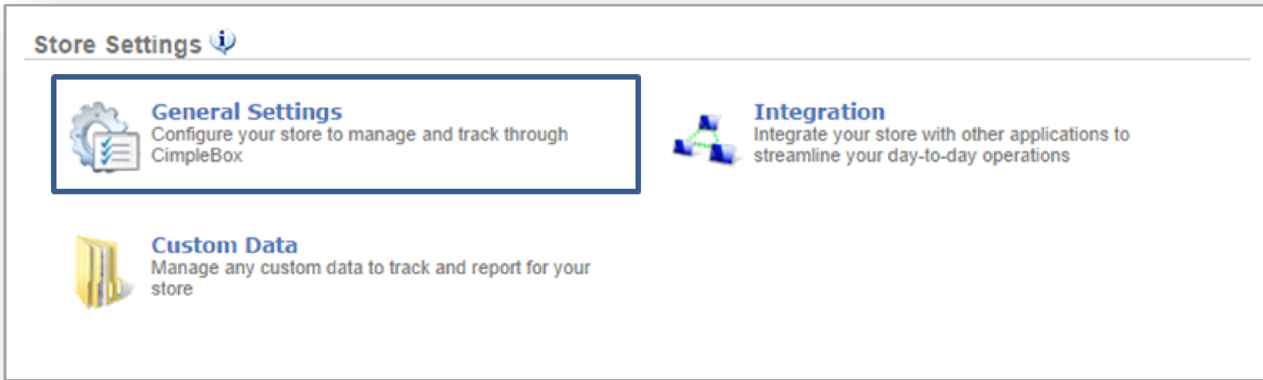
STEP 1: From your Dashboard view, mouse over to, and click, ***Settings***.



STEP 2: From the *Settings* screen, click ***Store Settings***.

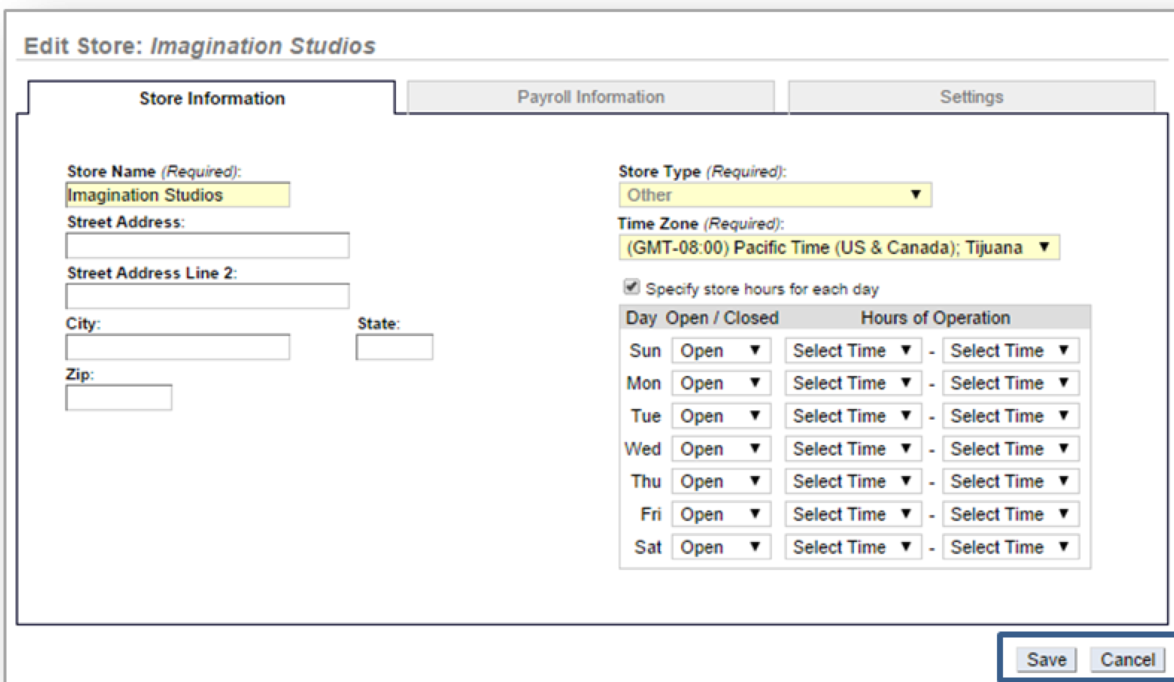


STEP 3: From the *Store Settings* screen, click ***General Information***.

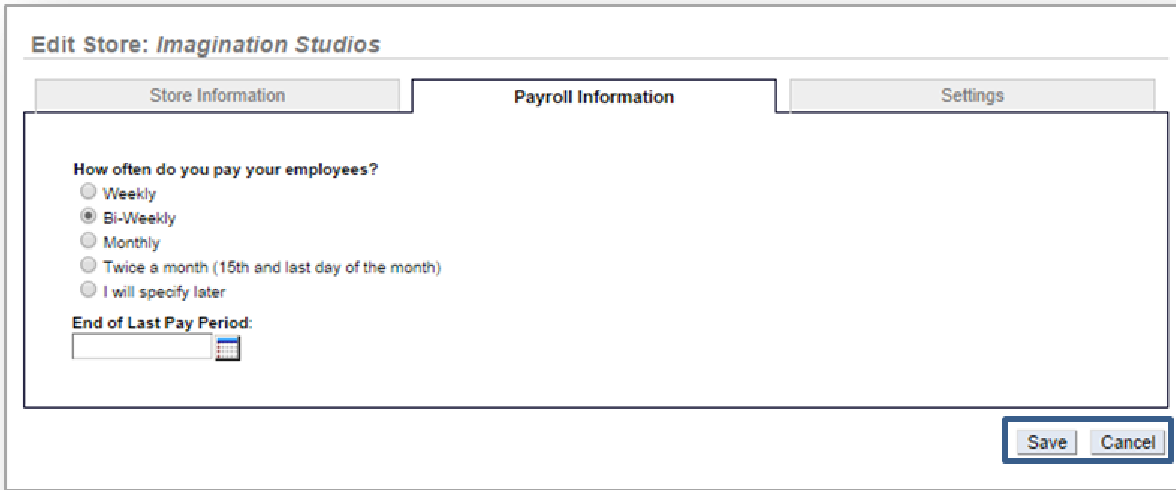


STEP 4: The *Store Information* tab will appear, along with Payroll Information and General Settings.

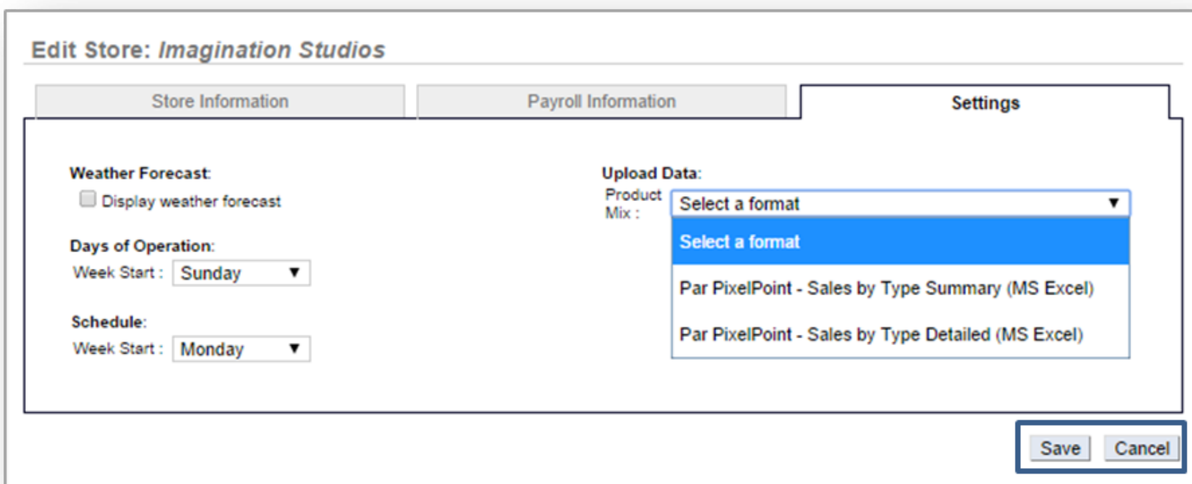
- **Store Information:** Store Name, Store Type, Time Zone and Hours of Operation are required. Fill in additional information as desired and click ***Save*** when done.



- **Payroll Information:** Select pay frequency and the end of last pay period. Click ***Save*** when done.



- **Settings:** Click to display weather forecast. Select start day of operations for your location and week start day for your work schedule. You can also upload product mix data from this screen. Click ***Save*** when done.



Related Topics

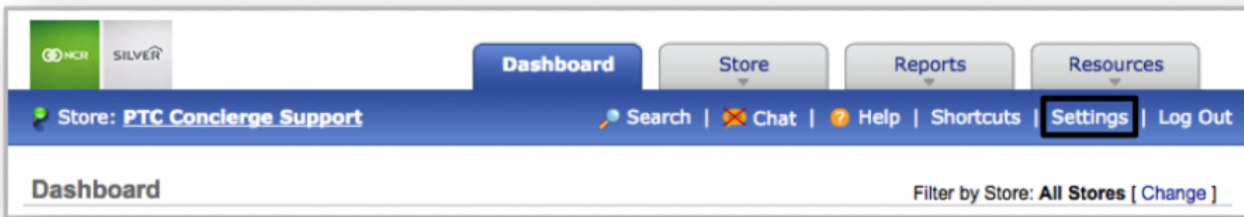
[Integration]

Integration

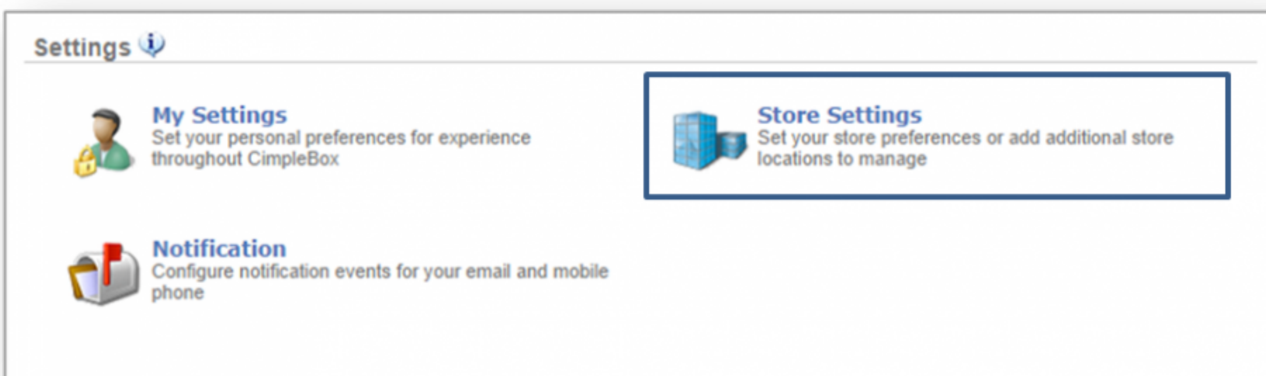
The purpose of this section is to illustrate how to manage POS and Payroll integration of information for your location.

POS Integration

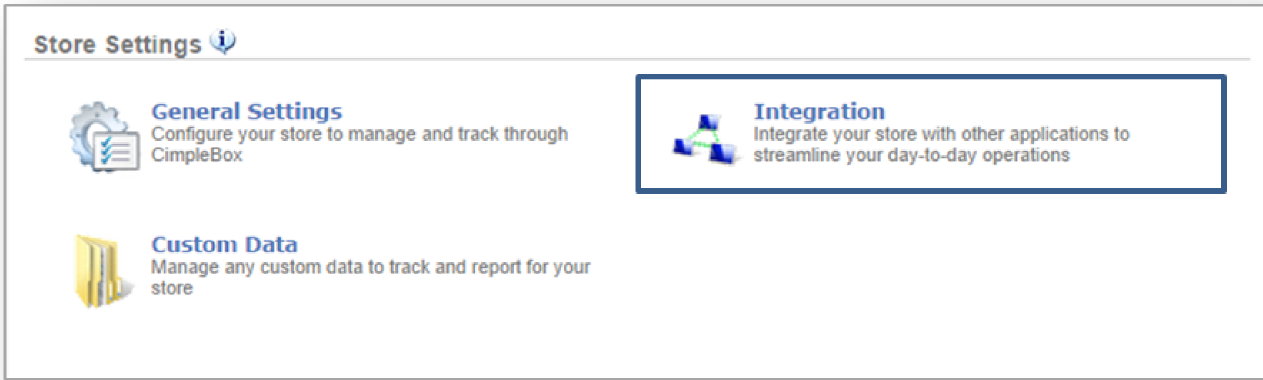
STEP 1: From your Dashboard view, mouse over to, and click, ***Settings***.



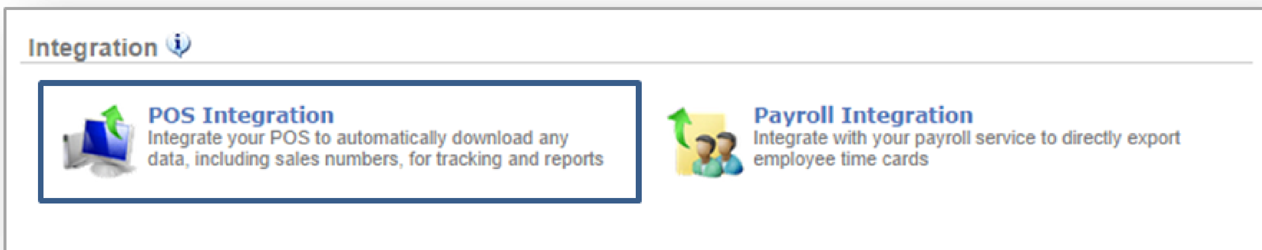
STEP 2: From the *Settings* screen, click ***Store Settings***.



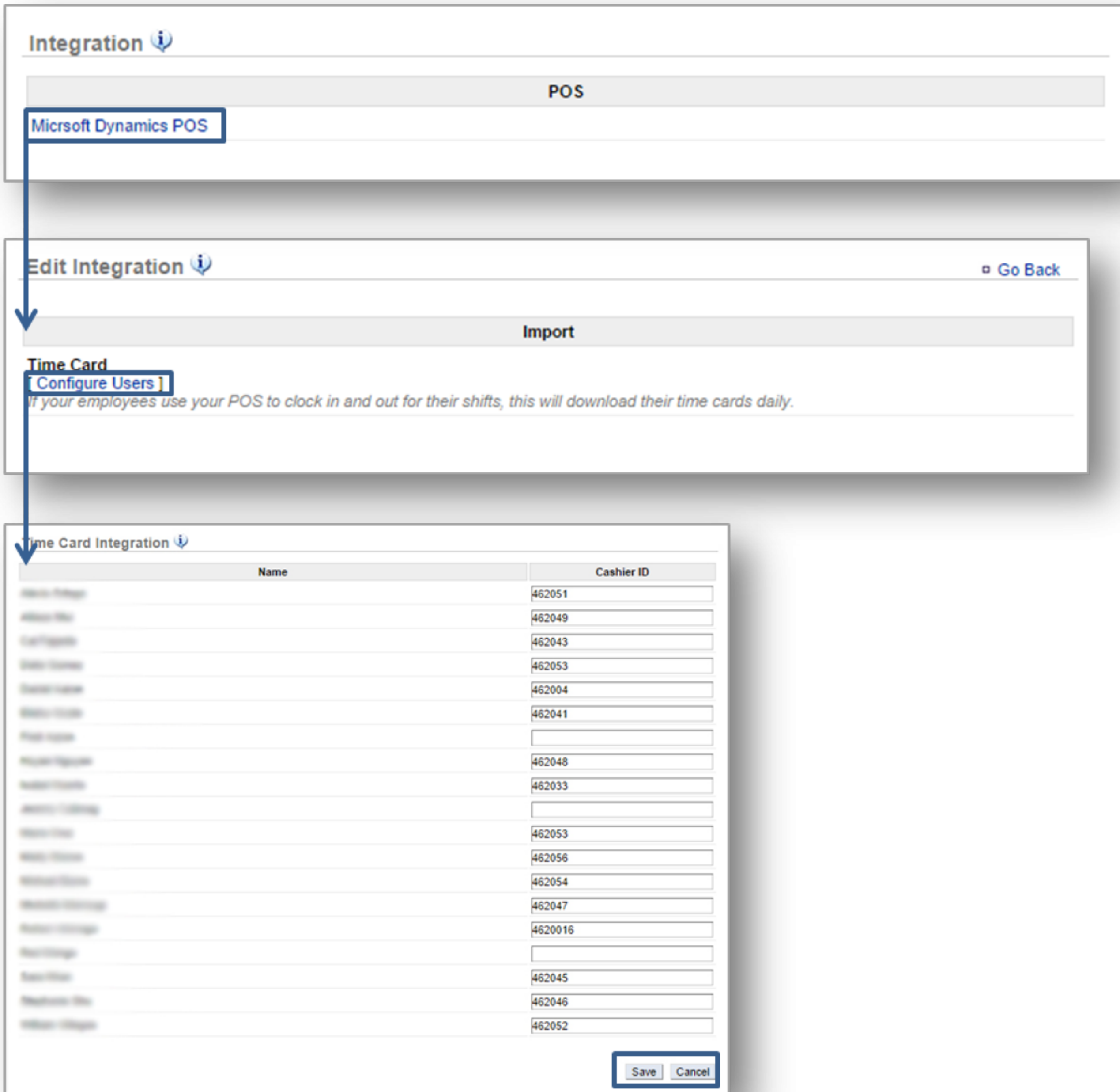
STEP 3: From the *Store Settings* screen, click ***Integration***.



STEP 4: From the *Integration* screen, select ***POS Integration***.

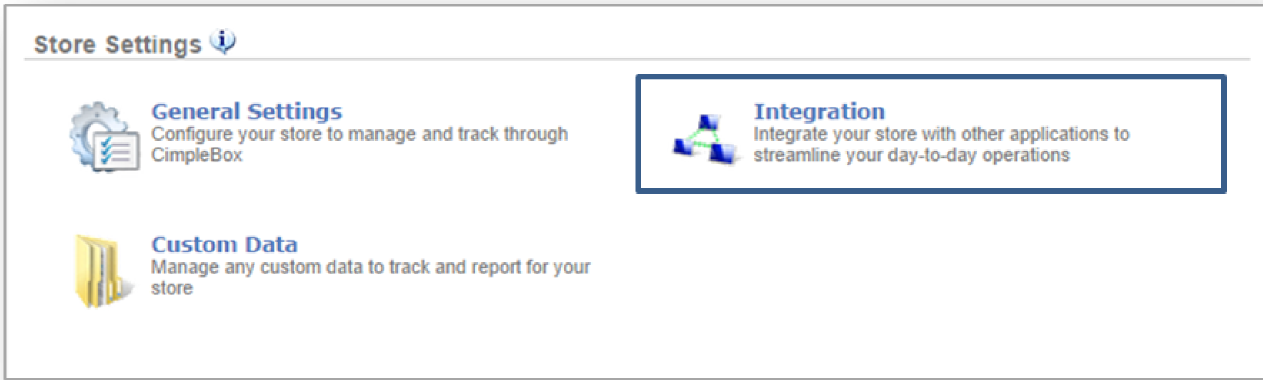


STEP 5: From the *POS Integration* screen, click on the POS name that appears and then on ***Configure Users*** to enter your employee's POS IDs. Click ***Save*** when done.

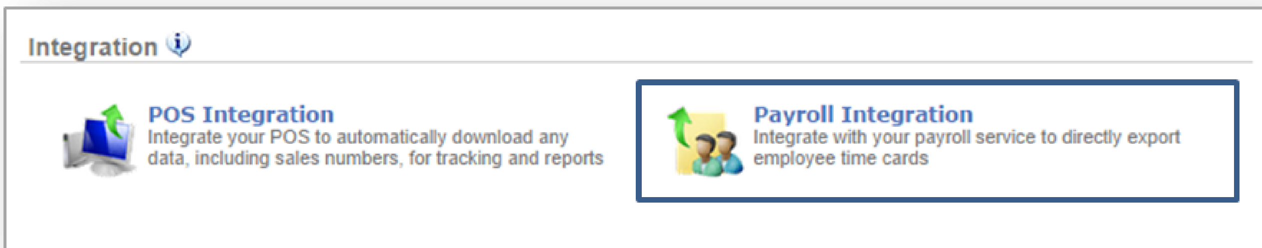


Payroll Integration

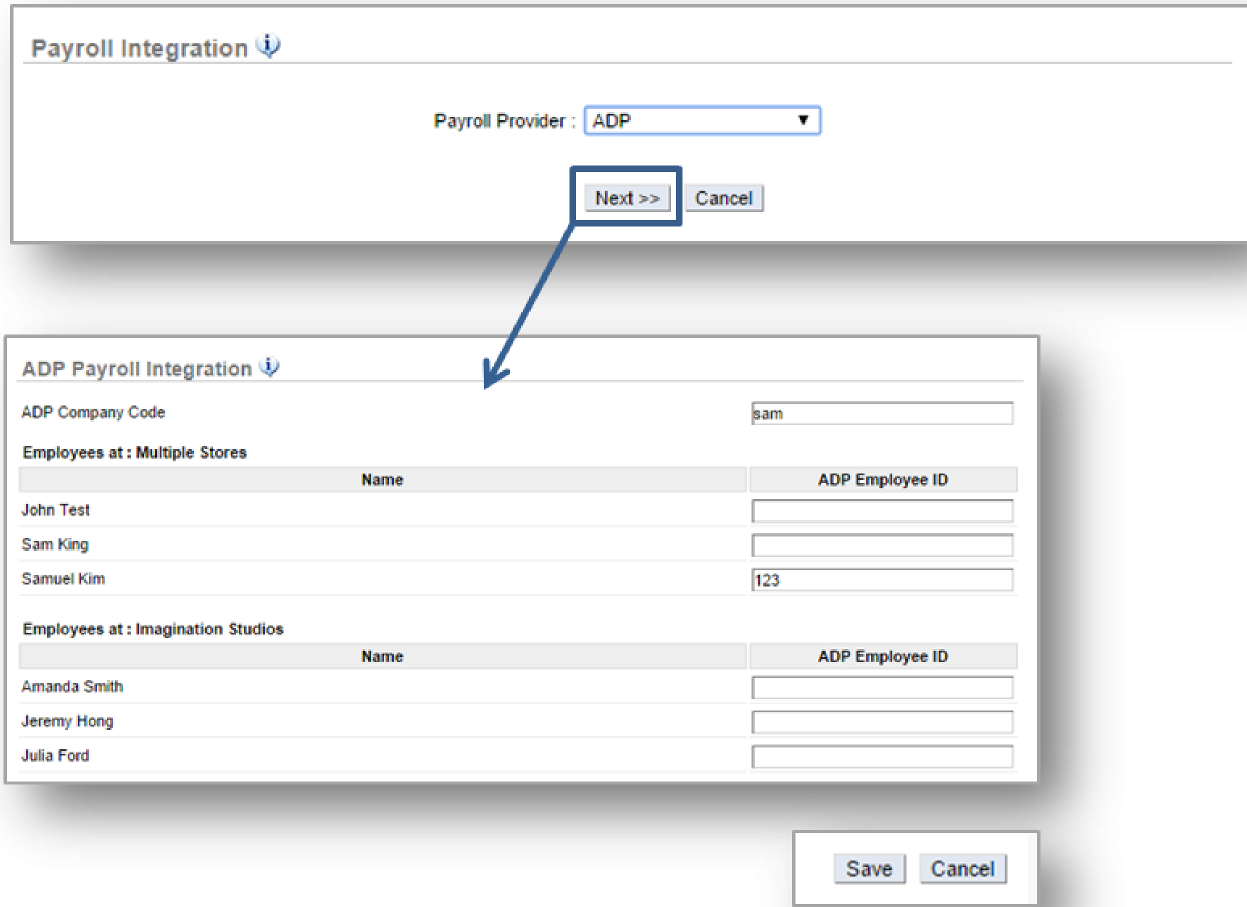
STEP 1: From the *Store Settings* screen, click ***Integration***.



STEP 2: From the *Integration* screen, select ***Payroll Integration***.



STEP 3: From the *Payroll Integration* screen, select your payroll provider and click ***Next***. From the screen that follows, enter your employees' payroll ID numbers and click ***Save*** when done.



Related Topics

General Settings

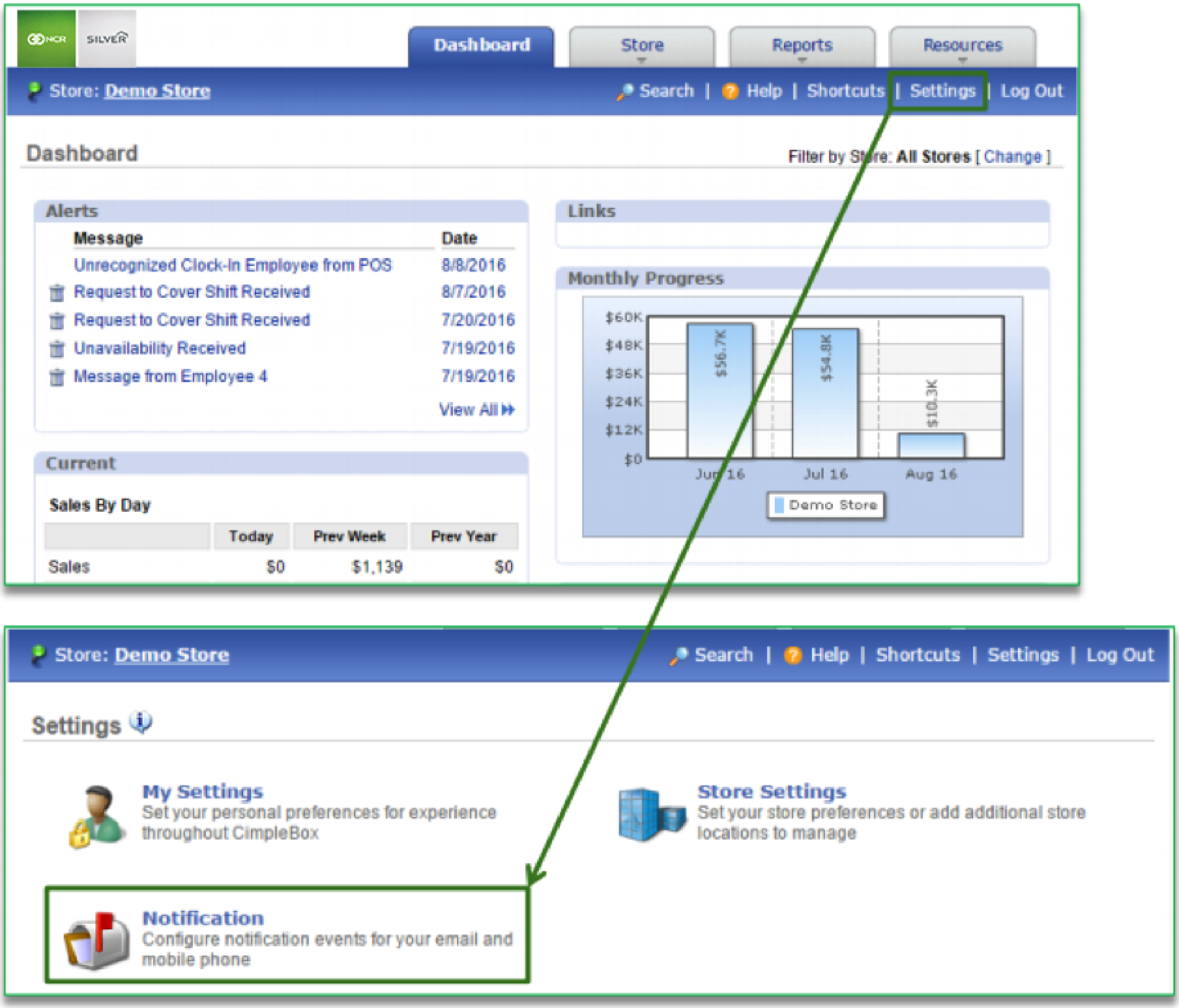
Notification Settings

In this module, you will learn:

- How to set notification preferences within Console

My Settings

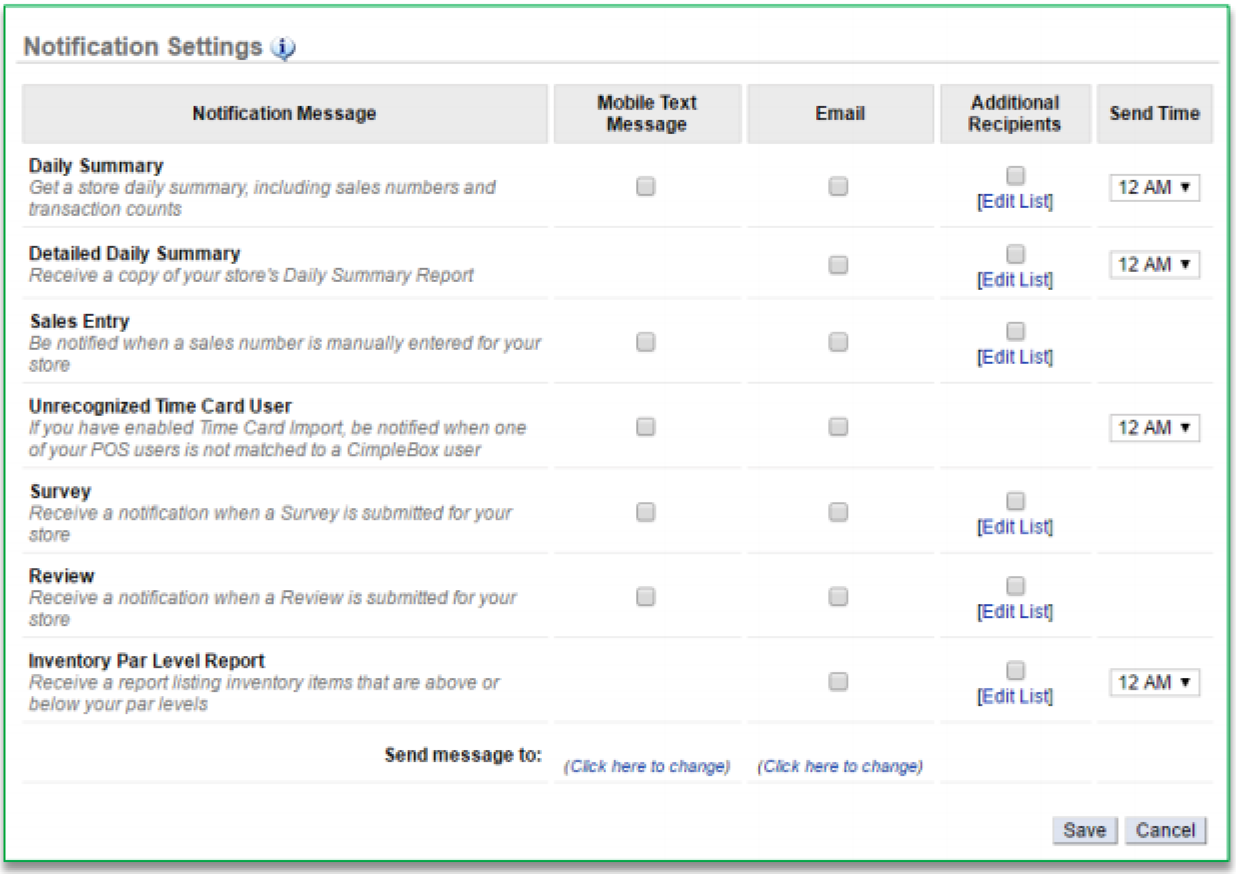
The Notification settings platform allows you to set notification preferences for available reports.
To set notification preferences you will need to click **Settings** (within the blue bar at the top of the page) and click **Notification**.



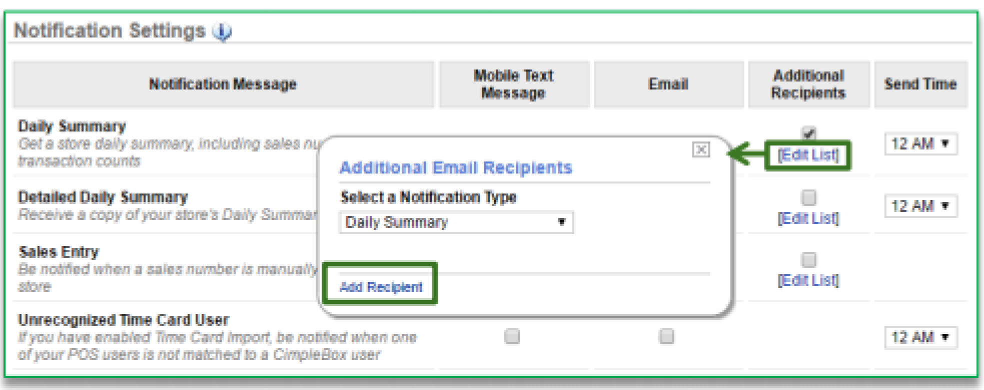
To Set Notification Preferences

1. Under the **Mobile Text Message** column, check the boxes to the right of each report that you wish to receive notifications for
   a. *This option will not be available for all reports*
2. Under the **Email** column, check the boxes to the right of each report that you wish to receive notifications for
   a. *This option will not be available for all reports*
3. If you want report notifications to be sent to additional recipients, check the boxes to the right of each report under the **Additional Recipients** column

a. *This option will not available for all reports*



b. *You may edit the recipient list at any time by clicking **Edit List***

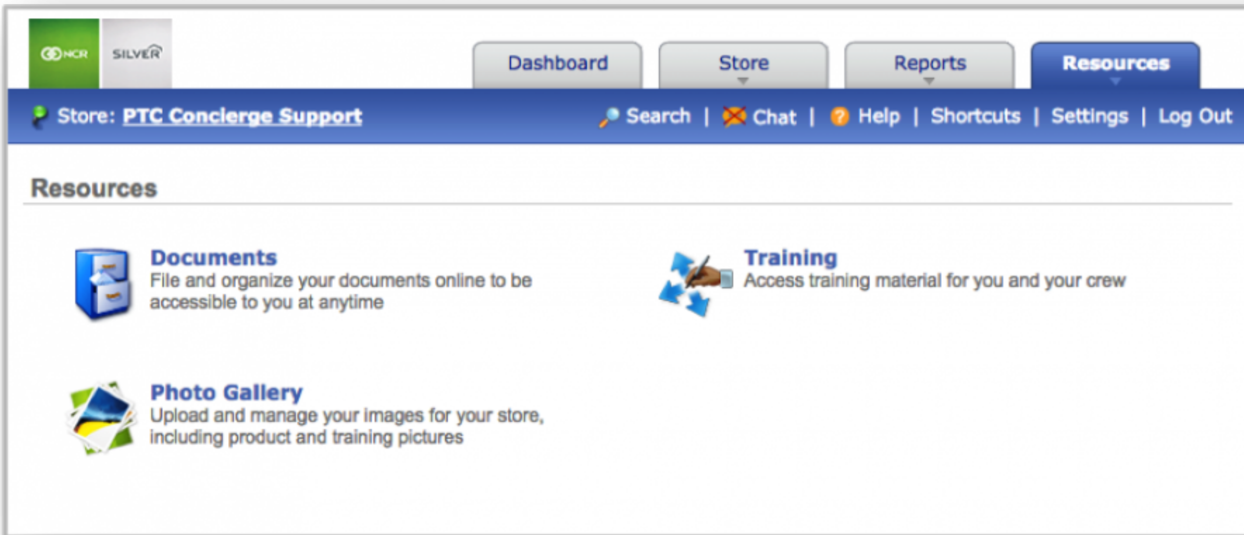


4. Select delivery times by checking the dropdown arrow to the of each report under the **Send Time** column
   a. *This option will not available for all reports*
5. Click **Save**

- **Click here to see the full details**

Resources

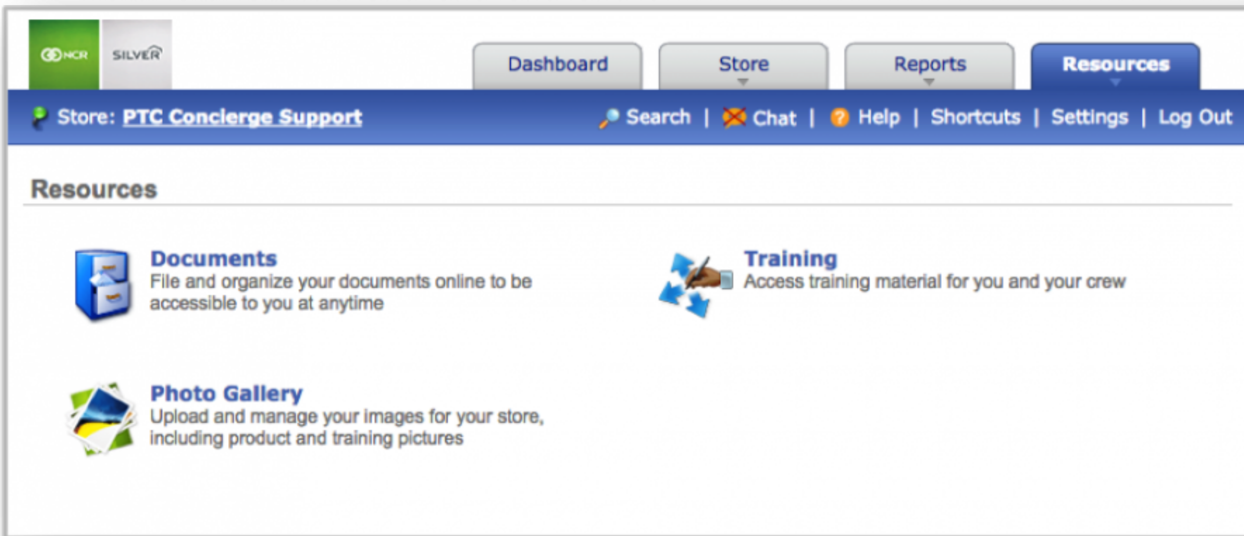
This section will illustrate how to manage available resources (e.g. documents, training videos and certification tests and photos). Click on a topic below for more information.



Resources
[Documents]
[Videos & Training]
[Photo Gallery]

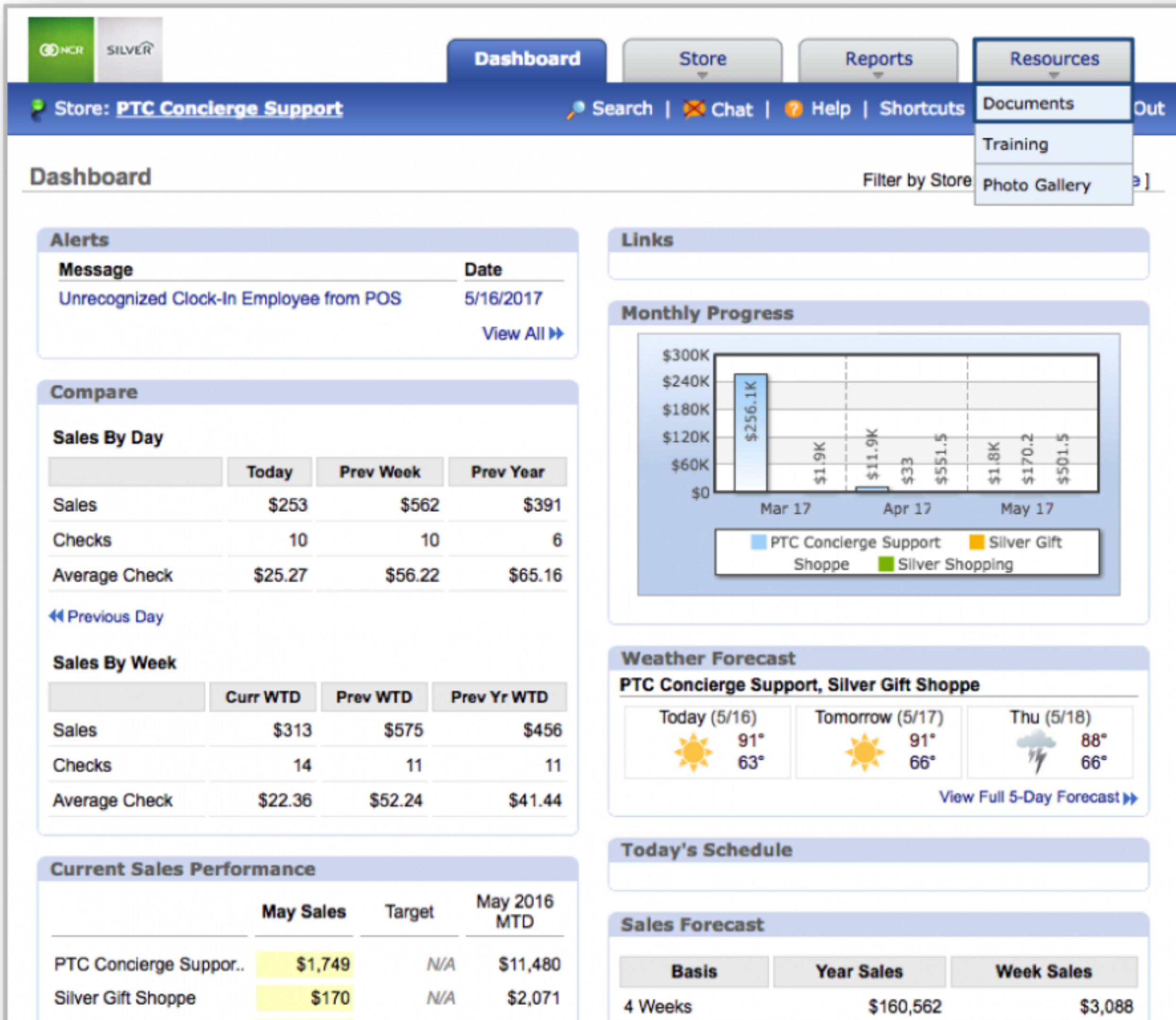
Documents

The purpose of this section is to illustrate how to manage the document storage feature on CimpleBox. This includes personal documents, documents shared with you by others, and corporate resources.

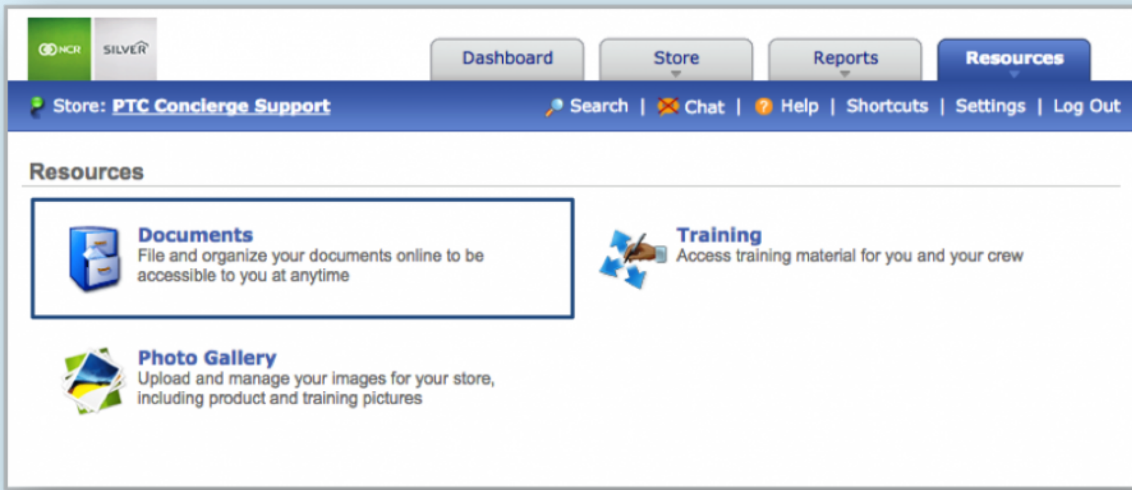


My Documents

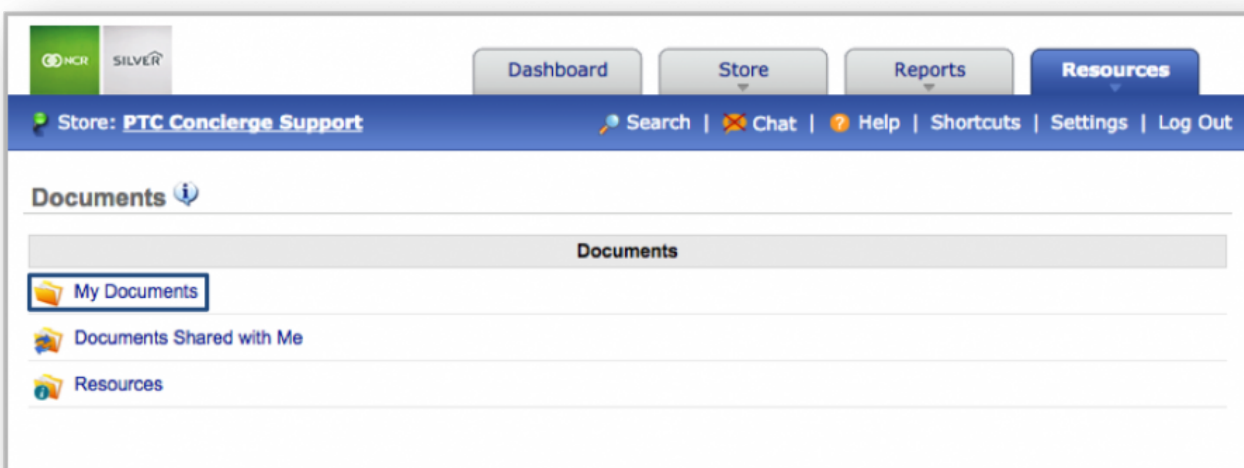
STEP 1: From your Dashboard view, mouse over the ***Resources*** tab and click ***Documents***.



Hint: You can also access *Documents* by clicking on the ***Reports*** tab and then on ***Documents***.

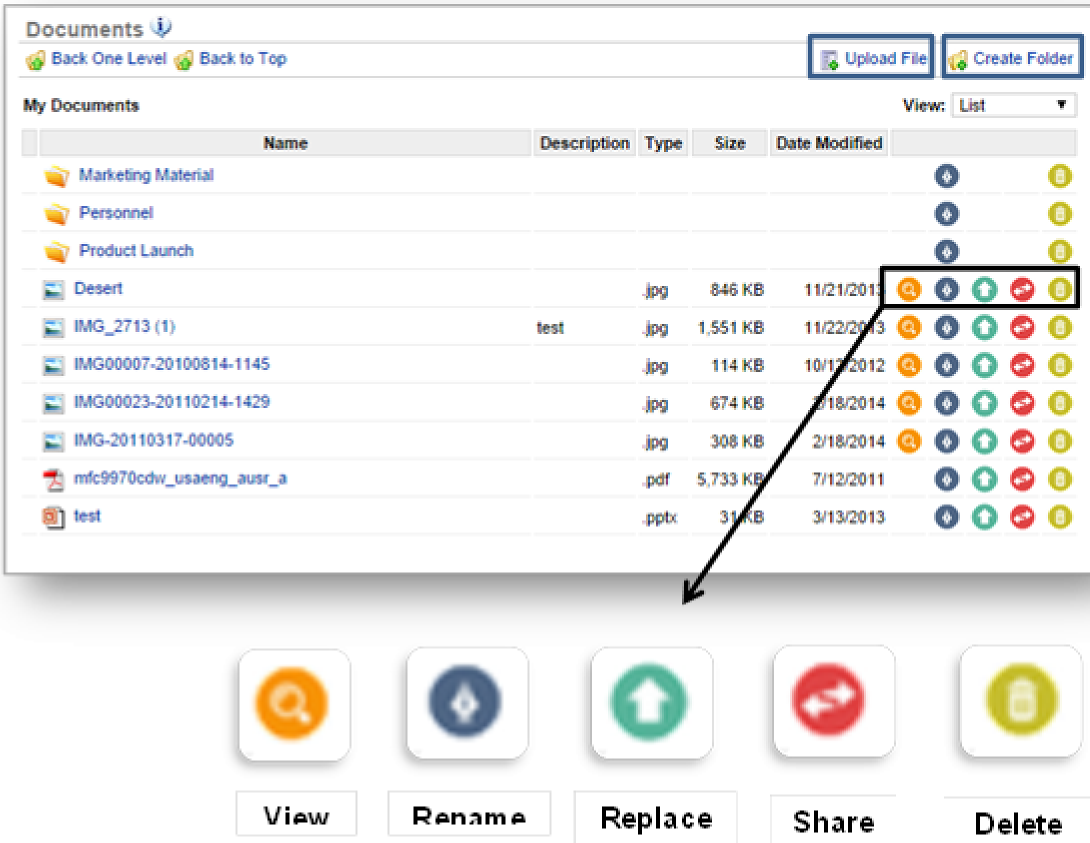


STEP 2: From the *Documents screen*, click ***My Documents***.



STEP 3: The *My Documents* screen will appear. My Documents are those documents that you upload and manage. You can choose to share documents or folders with others and there is no limit to the number of folders or documents you can store!

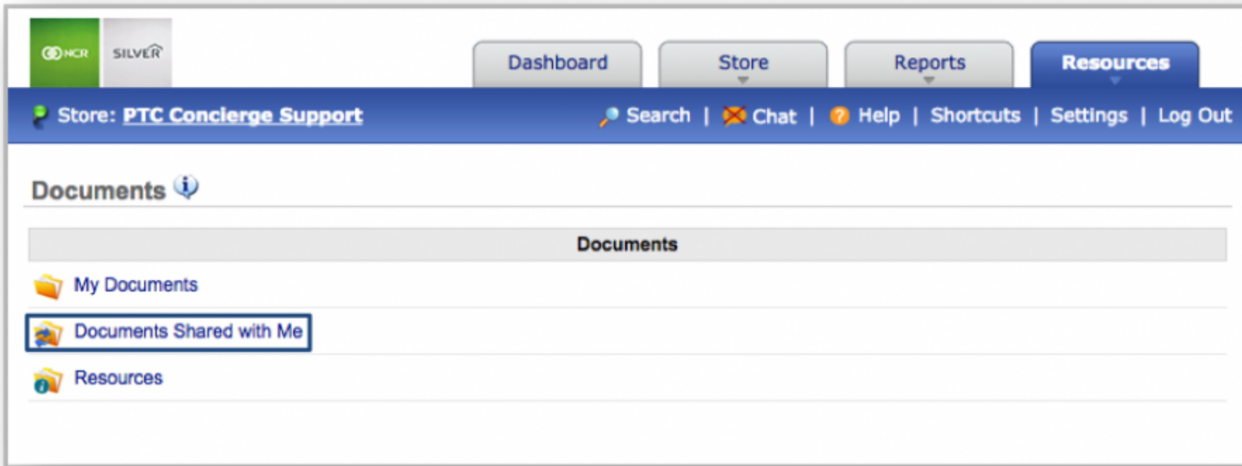
- Click ***Upload File*** at the top right corner of the page to add a new file.
- Click ***Create Folder*** at the top right corner of the page to create a new folder.



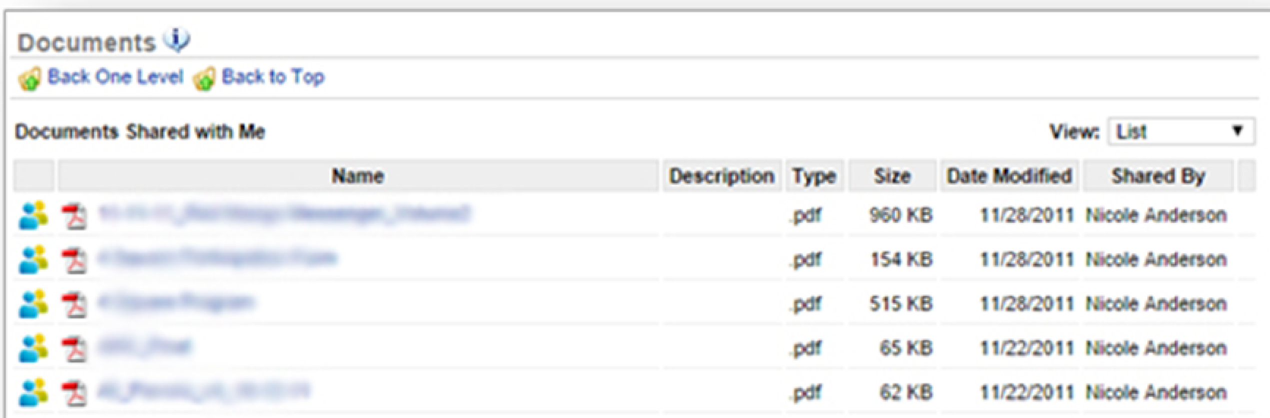
Note: Files that have already been uploaded can't be "moved" to another folder. The folder must be opened and the file must be uploaded to that folder.

Documents Shared with Me

STEP 1: From the *Documents* screen, click ***Documents Shared with Me***.

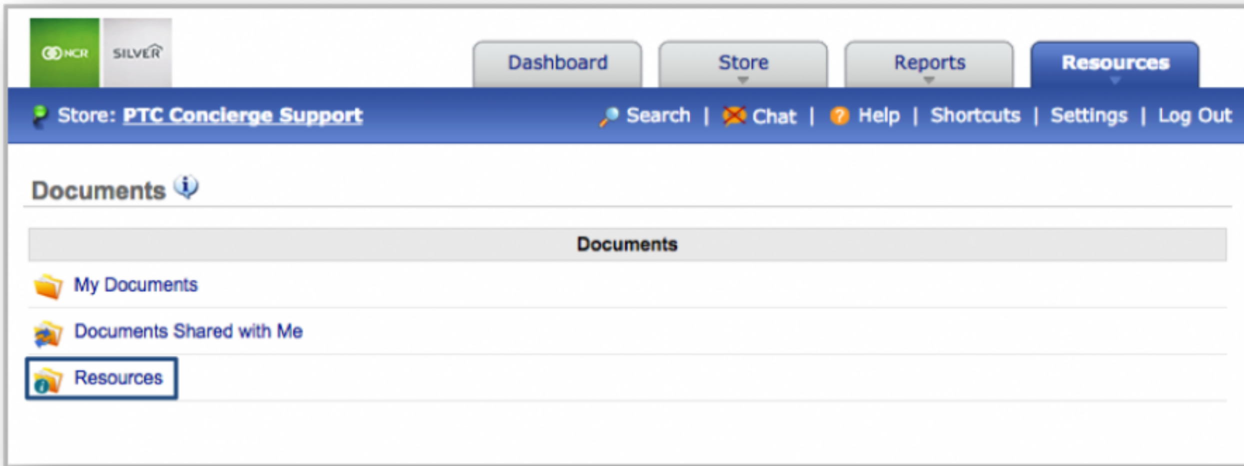


STEP 2: Any document or folder that has been shared with you by others will appear on your screen. Most recent files will appear at the top of the list.

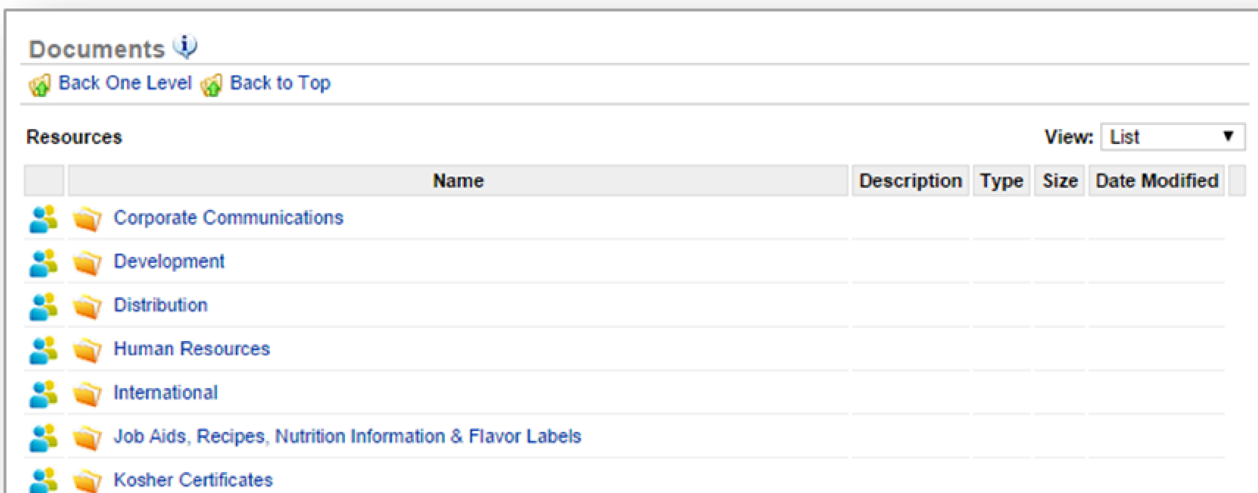


Resources

STEP 1: From the *Documents* screen, click ***Resources***.



STEP 2: Any document or folder that has been uploaded to this folder will appear on your screen.



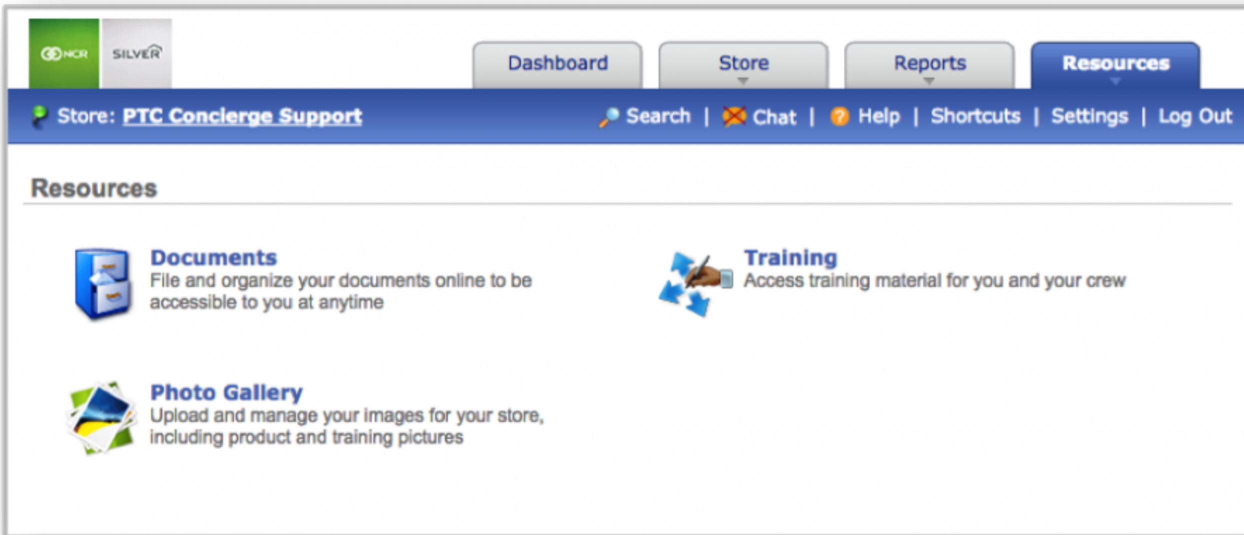
Related Topics

[Videos & Training]

[Photo Gallery]

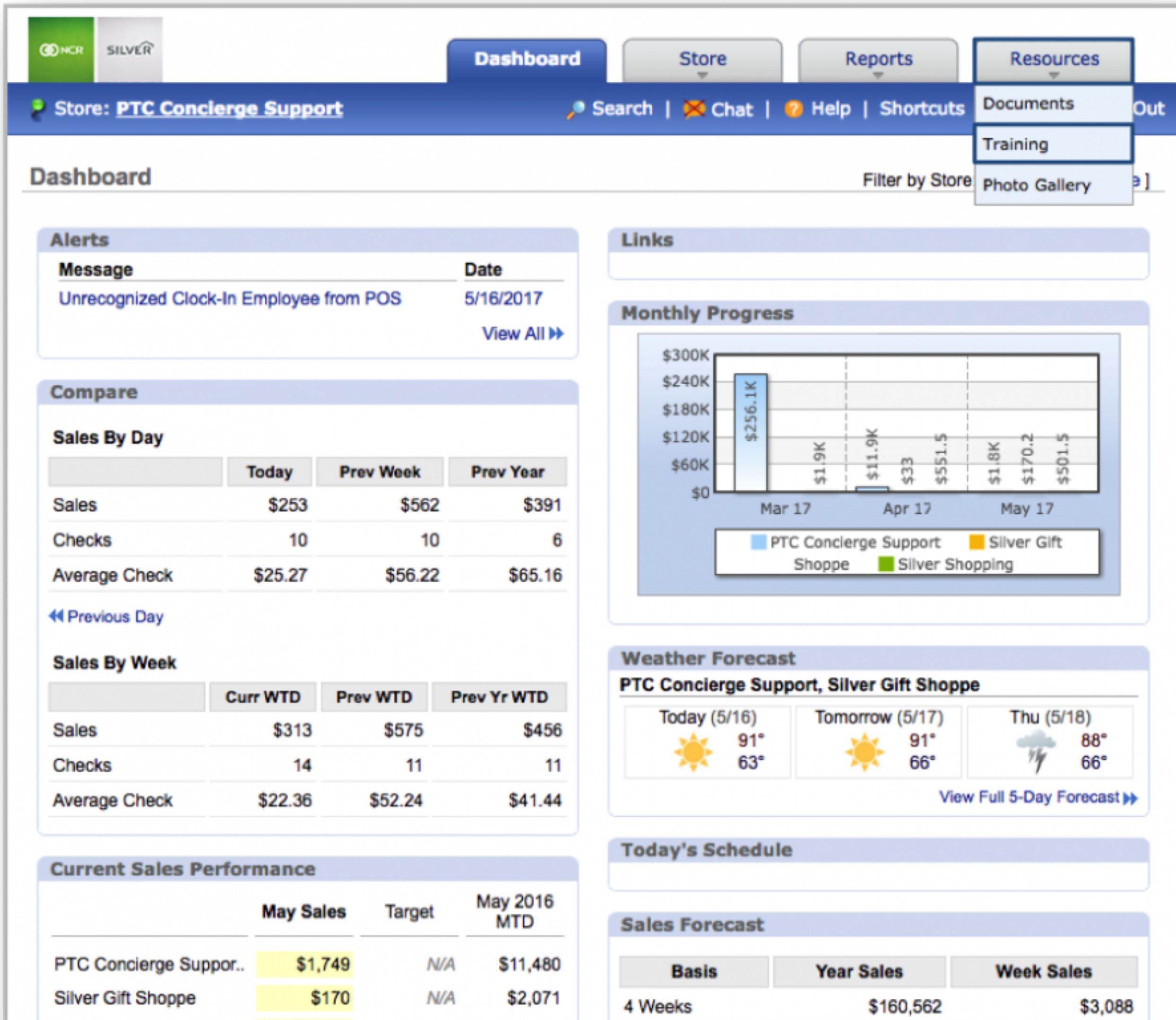
Videos & Training

The purpose of this section is to illustrate how to access training videos and certification tests on CimpleBox.

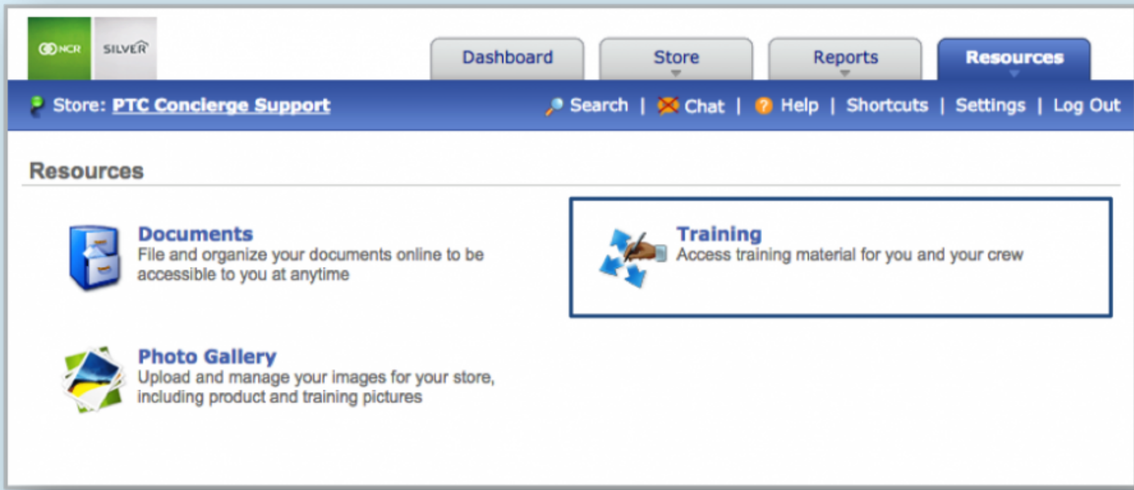


Videos & Training

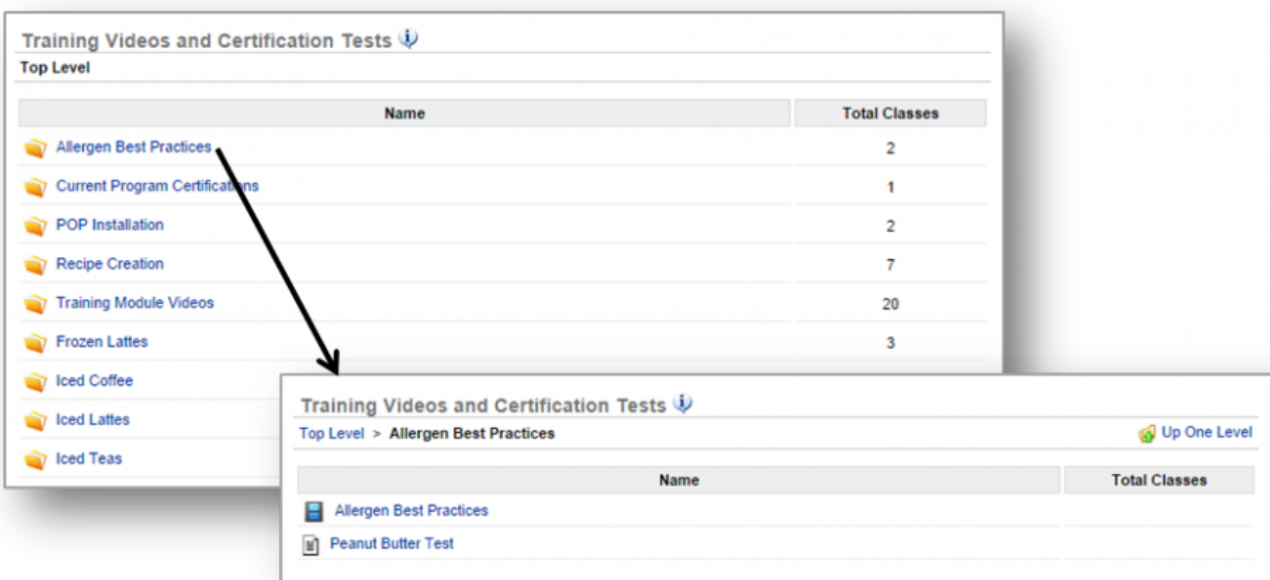
STEP 1: From your Dashboard view, mouse over the ***Resources*** tab and click ***Training***.



✱ ***Hint:*** *You can also access* ***Training*** *by clicking on the* ***Resources*** *tab and then on* ***Training***.



STEP 2: From here, click on the course you wish to access. The course folder will contain any applicable videos and/or certification tests. Click on the video or test you wish to access.



Related Topics

Documents

Photo Gallery

Photo Gallery

The purpose of this section is to illustrate how to access your photo gallery.

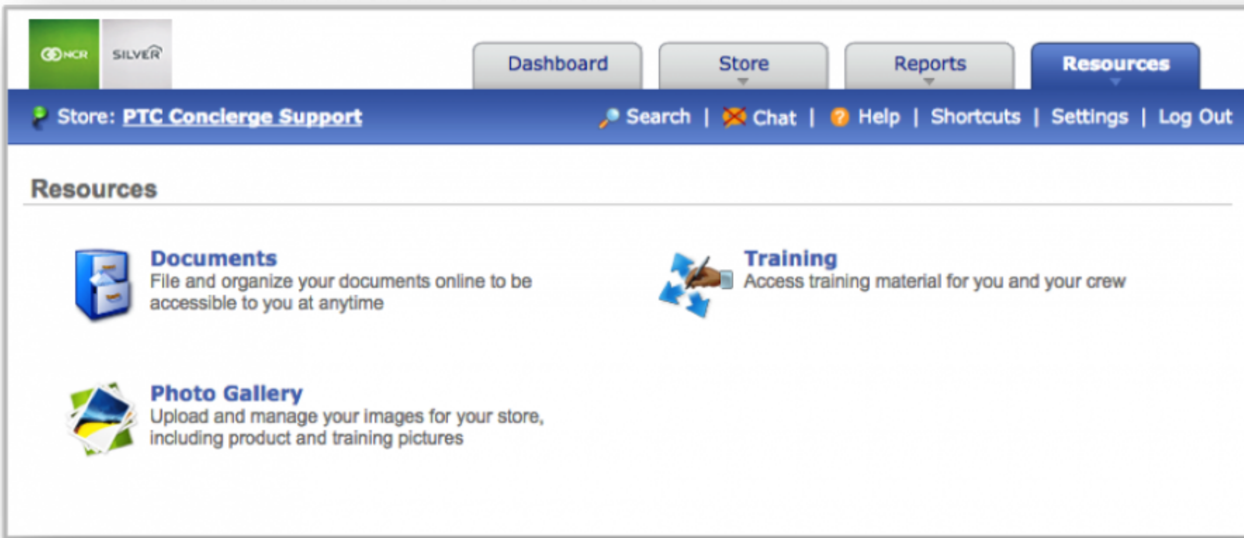
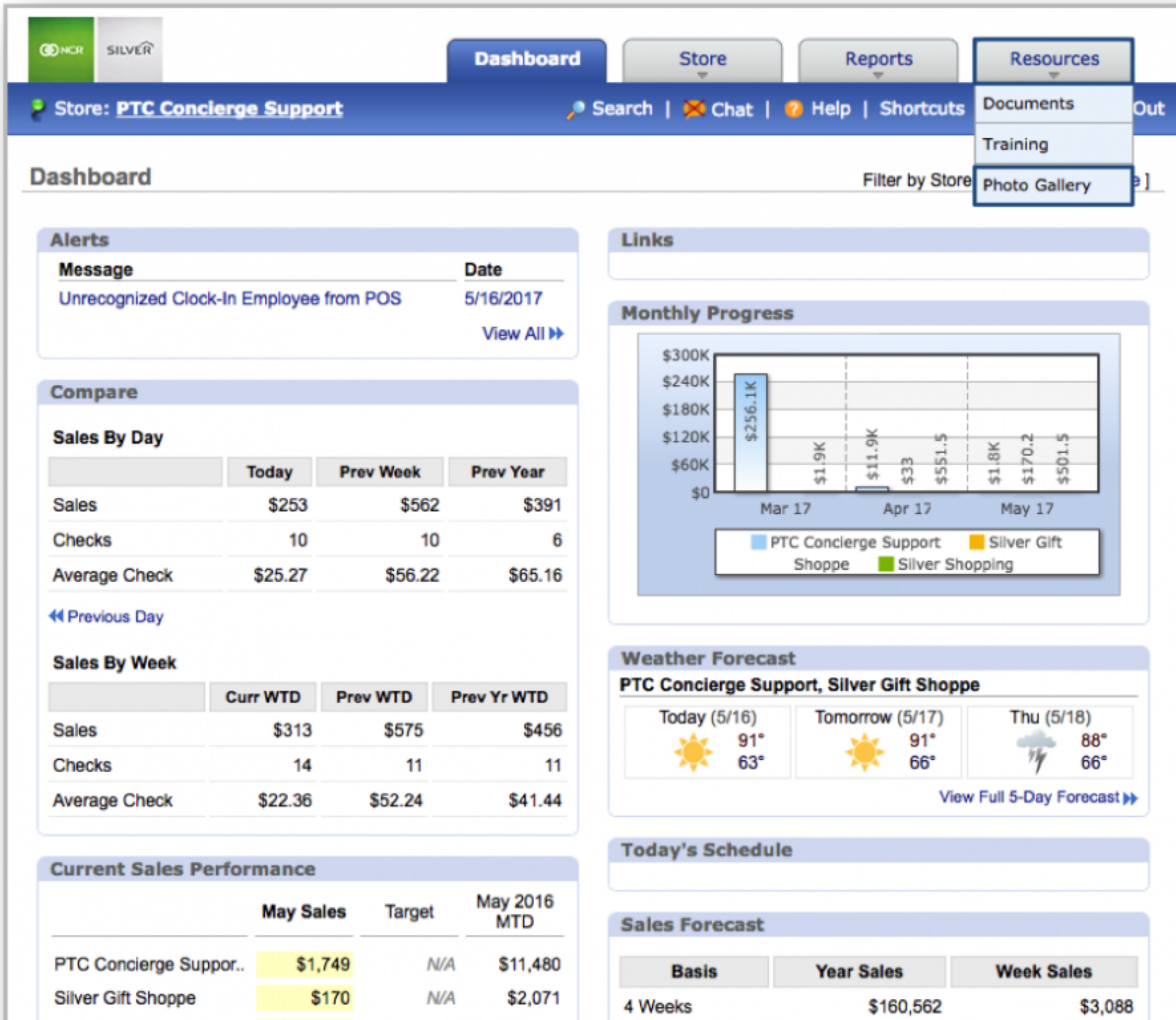
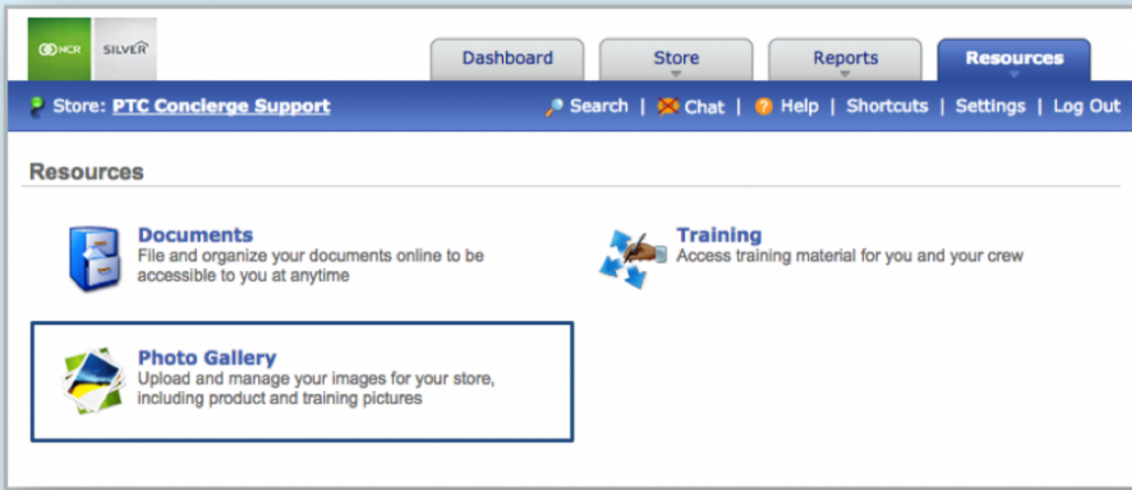


Photo Gallery

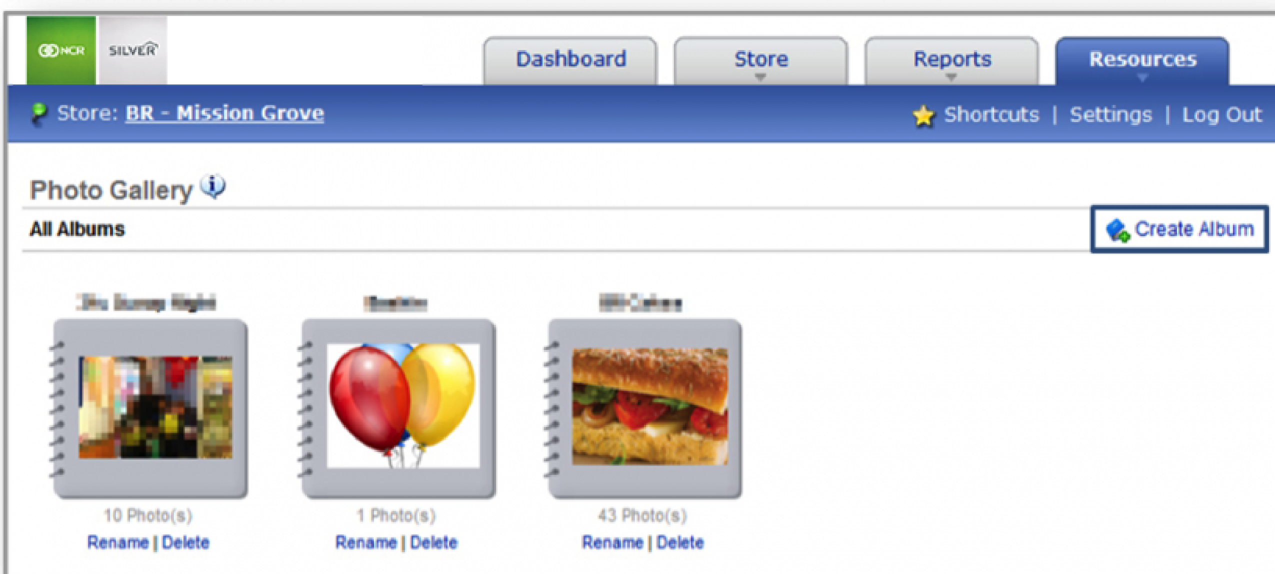
STEP 1: From your Dashboard view, mouse over the ***Resources*** tab and click ***Photo Gallery***.



> *Hint:* You can also access *Training* by clicking on the ***Resources*** tab and then on ***Photo Gallery***.



STEP 2: From here, click on the photo or album wish to access. Keep in mind that others can post to your Photo Gallery as well. There is no limit to the number of albums or images you can store! To create an album, click ***Create Album*** at the top right corner of the page.



Related Topics

Documents

Videos & Training

Release Notes

With each version, we're bringing you more great features that will make running your business even smoother and more time efficient! For detailed information and articles, please select a release below.

v4.3.3 – July 2017

Release Notes

Salaried Employee Costs included in Work Schedule

Labor costs are now calculated for your salaried employees included in the work schedule. Now, the total labor costs and estimated labor percentages more accurately measure planned labor expenses. Salaried costs are normalized to a daily rate, that is applied regardless of scheduled hours.
Requires Employee Management subscription. Available with all POS integrations.

Take Inventory History

Now you can review the history of inventory takes directly from the Take Inventory module. Simply click “View History” from “More Options” to view submission details and/or modify records.
Requires Inventory Management subscription. Available with all POS integrations.

v4.3.2 – July 2017

Release Notes

NEW! Aloha Labor Reports

Detailed labor reports are now available to Console customers with the Aloha point of sale integration. Reports include:

- Employee History: View a history of notes on all of your employees
- Time Card: View time card details for a given period of time
- Time Card Discrepancy: Compare employee schedules and their actual time cards

Requires Employee Management subscription. Available with Aloha POS integration.

NEW! Aloha Tax Category Report

Now you can easily access details as tax category, tax amount, and tax rate from the new Tax Report. Requires subscription to Console Advanced Reporting. Available with Aloha integration.

Employee Notes Enhancement

Employee notes have been enhanced to display the creator's name and timestamp. This enhancement also identifies the user and timestamp for which a note was last modified.
Requires Employee Management subscription. Available with all POS integrations.

"Mistake" Inventory Reconciliation Reason

By popular demand, "Mistake" is an available inventory reconciliation reason.
Requires Inventory Management subscription. Available with all POS integrations.

v4.3.1 – June 2017

Release Notes

Sales Breakdown from Day-to-Day

With the 4.3.1 release of NCR Console, you can drill down to the Sales Breakdown from the Day-to-Day calendar. When viewing the daily details in the Day-to-Day calendar, just click the net sales link to access the Sales Breakdown.
Requires Advanced Reporting subscription. Available with all POS integrations.

Sales Breakdown from Daily Summary

You now have easy access to the Sales Breakdown directly from the the Daily Summary. Simply click the net sales amount in the Daily Summary report to view more detailed transactional information.
Requires Advanced Reporting subscription. Available with all POS integrations.

v4.3.0 – June 2017

Release Notes

Guest Count

Guest count details captured at the point of sale are now available throughout Console reporting. Guest count is available in the Sales report, the Daily Summary, and the Key Indicator. Additionally, guest count can be found on the dashboard, in the Sales Breakdown, and in Check Details.
Don’t fret if your POS brand doesn’t capture guest count. In these cases, the guest count quantity will equal the check count quantity.
Requires Advanced Reporting subscription. Available with all POS integrations.

Custom Suggested Sales Target

The suggested sales target tool was enhanced to give you more control over your goals. You can now use the tool to set goals in any amount (positive or negative).
Requires Advanced Reporting subscription. Available with all POS integrations.

v4.2.7 – June 2017

Release Notes

Day-to-Day Report

The Day-to-Day report is now available in the store portal reports module. You can now easily view information captured in the day-to-day calendar through a single report. This level of reporting allows you to track the daily activity that is meaningful to your business.
Requires Advanced Reporting subscription. Available with all POS integrations.

Inventory Reconciliation Reasons

Create inventory reconciliation reasons that are unique to your business, so that you can more effectively track your inventory history. Follow these steps to manage custom reasons:

1. Log into your store portal account
2. Navigate to the “Take Inventory” page
3. Click “Manage Reasons” from the “More Options” link
4. Voilà! Create and modify reconciliation reasons

Requires Inventory Management subscription. Available with all POS integrations.

Time Card Discrepancy Report Enhancement

Understanding the financial impact of utilizing your workforce outside of scheduled hours has never been easier. The Time Card report has been updated to include the cost difference between scheduled and actual labor. For example, Bobby was scheduled to work 20hrs, but he actually worked 25hrs this week. At $10 an hour, that’s $50 in unplanned labor costs!
Requires Employee Management subscription. Available with all POS integrations except Aloha.

Employee Record

Now you can quickly download an employee’s record from their employee profile. The file captures personal information, contact information, pay history, and any notes for the employee.
Requires Employee Management subscription. Available with all POS integrations.

View All

With each version, we're bringing you more great features that will make running your business even smoother and more time efficient! For detailed information and articles, please select a release below.