

Topic: **REPORT CUSTOMISATION OPTIONS**

SharpLynx Lite has a number of sales reports that are based on data retrieved from your ECR/POS terminal. Understanding the various ways you can customise your reports will help you to tailor your reports to suit how you want to analyse your business.

The screenshot shows the 'Reports' interface with the following sections:

- Report Selection:** A list of report types including Sales Terminals, Transaction, Group Sales, Department Sales, Item Sales (highlighted), Hourly Sales, and Electronic Journal.
- Date Range:** A dropdown menu set to 'Month to Date' with date pickers for '01/10/2016' and '16/10/2016'.
- Filters:** Input fields for 'Departments:' and 'Items:' with dropdown menus and 'to' indicators.
- Sorting & Grouping:** Checkboxes for 'Group by department' and 'Sort by description'.
- Options:** Checkboxes for 'Tax Exclusive Sales Amounts', 'Summarise report', and 'Include chart on report'.

At the bottom right, there are buttons for 'View', 'Print', and 'Close'.

FAQ What are the basic ways to customise a report?

- **Date Range** - various preset date ranges are available for reports based on sales and transactional data. These allow you to quickly choose the dates you want your report based on - such as 'Month to Date' or 'Last Week'. The 'Custom Date' option allows you to choose a specific date range.
- **Filters** - Filters allow you to narrow down your report to a specific range that relates to your report.
 - For instance you might want to view various sales reports based on a specific department
- **Sorting and Grouping** - These options allow you to change the order of the data or the way that it is presented on your report.
 - For instance you might want to view a sales report grouped by Department
- **Options** - Some reports have specific options available that allow you to vary the data being viewed. For example:
 - You can choose to view some sales reports with 'Tax Exclusive Sales Amounts', so any items that have GST/VAT applied to them will have the tax value removed from the sales figures on the report, giving you a better idea of the income into your business relating to those sales
 - Some reports (eg. Department and Hourly Sales reports) have an optional chart that can be added to the report, giving you a visual aid to the figures displayed on the report