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LAST UPDATED:
7/21/2023

RECTRAC 3.1 RUNNING SALES REPORTS

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RecTrac 3.1 Running Sales Reports



Sales Reports in RecTrac 3.1 - Overview

The reporting engine in RecTrac 3.1 has been enhanced significantly. Reports are now more general in nature based on the kind of item you are reporting on, with each "report" having different outputs to choose from based on how you want the data presented. This allows you to setup your criteria on a report and then run it with multiple outputs to see the same data in different ways.

Sales reports in RecTrac 3.1 are generally run the same way across modules:

- Find the right kind of report based on the items you sell. Are they inventory items, service items, rental items etc.
- Setup report criteria based on what you are looking for.
- Select the proper 'Output Template' based on what you want to report on.
- Select the proper 'Output Type' (Summary or Detail) based on how you want the data reported.

Reports also run in the background in RecTrac 3.1. Meaning, if you are running a long report, it will not tie up your RecTrac session; the server will process the report and when it's done it will be presented to you.

Every report you run gets saved in the Document Center. You can find the Document Center in your menu on the left. For instance, if you ran a report 2 weeks ago and want to view it again, you can find it in the document center.

Reports are also very customizable. If there is some specific information you're looking for and haven't found a report that has it, submit a ticket through the AIMS Help Desk with the information you're looking for and IT will explore creating a report.

RecTrac 3.1 Running Sales Reports



Running Sales Reports

Step 1: First, find the sales report you wish to run. For example:

- Inventory → Search for 'Inventory Sales Reports' from the menu.
- Service Items → Search for 'Service Item Sales Reports' from the menu.
- Rental Items → Search for 'Rental Reservation Reports' from the menu.

For example purposes, we will be running a report to answer the following question:

"What is my best selling menu item for a month?"

Restaurant items are setup as "Inventory" in RecTrac and we will be using "The Brig" snack bar at Norfolk Navy Shipyard for this report. SAP site 1256, so based on item coding all items start with MA1256..

Click the 'Menu' button in the upper right hand corner of the RecTrac window and start typing 'Inventory'. Select 'Inventory Sales Reports'.



A screenshot of the RecTrac search results interface. The search bar contains the text 'Inventory'. Below the search bar, a list of results is displayed under the heading 'Filtered Results (8)'. The results include 'Inventory Inquiry', 'Inventory Item Reports', 'Inventory Management', 'Inventory Posting', 'Inventory Reports', 'Inventory Sales Reports', 'Mailing/Inventory Label Template Ma...', and 'Opticon Inventory Import'. The 'Inventory Sales Reports' result is highlighted with a red box and has a yellow star icon next to it. A red box also highlights the search bar containing 'Inventory'. A red arrow points from the text above to the menu icon (a 3x3 grid of dots) in the top left corner of the interface.

RecTrac 3.1 Running Sales Reports



Running Sales Reports – cont.

Step 2: The following screen will display,

Note: Report screens are very similar across modules. Once you understand the different functions/criteria setup of one report, others will work the same way.

POS Inventory Sales Report

Core Criteria HH / FM Criteria Transaction Criteria Question/Answer Criteria

POS Inventory Sales Report

Inventory Items DataGrid

Options Templates (0) Refresh Inventory Codes 1 to 12 of 500 (Limited to 500)

Inventory Code	Short Description	Status	Site Code	Site Arr
(3) Active, L...				
<input type="checkbox"/>	CNIC-FNB-SHARED-001	***Cook - Rare	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-002	***Cook - Medium Rare	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-003	***Cook - Medium	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-004	***Cook - Medium Well	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-005	***Cook - Well	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-006	***No	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-007	***Add	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-008	***Extra	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-009	***Deliver	Active	

Inventory Item Range

Use Inventory Code Range

Inventory Code WildCard

Inventory Item Status: (0) Selected

Wildcard Option: Matches

Site Filters

Transaction Filters

Use Item Original Transaction Date Range

Sale Status: (1) Sold

Begin Transaction Date: Today 0

End Transaction Date: Today 0

Output Group: All Outputs Add Output Custom Title:

Output Template: Flash Report Part 1 - Sales Statistics Update Output Output Type: Detail

Default Settings Last Settings Report Templates

Process Prev Next

Report Screen Legend

Core Criteria HH / FM Criteria Transaction Criteria Question/Answer Criteria

Advanced criteria screens used for filtering,

Inventory Items DataGrid

Options Templates (0) Refresh Inventory Codes 1 to 12 of 500 (Limited to 500)

Inventory Code	Short Description	Status	Site Code	Site Arr
(3) Active, L...				
<input type="checkbox"/>	CNIC-FNB-SHARED-001	***Cook - Rare	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-002	***Cook - Medium Rare	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-003	***Cook - Medium	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-004	***Cook - Medium Well	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-005	***Cook - Well	Active	
<input type="checkbox"/>	CNIC-FNB-SHARED-006	***No	Active	

Inventory item Data Grid. Used to make individual item selections when items are not in sequential order. Can be used in conjunction with inventory code ranges/wildcards.

RecTrac 3.1 Running Sales Reports



Running Sales Reports – cont.

Report Screen Legend cont.

The screenshot shows the 'Inventory Item Range' section with options for 'Use Inventory Code Range', 'Inventory Code WildCard', 'Inventory Item Status' (set to '(0) Selected'), and 'WildCard Option' (set to 'Matches'). Below this are 'Site Filters' and 'Transaction Filters' sections. The 'Transaction Filters' section includes 'Use Item Original Transaction Date Range' (checked), 'Sale Status' (set to '(1) Sold'), 'Begin Transaction Date' (set to 'Today'), and 'End Transaction Date' (set to 'Today').

Item Range and Date Range filters.

The screenshot shows the 'Output Group' dropdown set to 'All Outputs' and the 'Output Template' dropdown set to 'Flash Report Part 1 - Sales Statistics'. There are 'Add Output' and 'Update Output' buttons next to the dropdowns.

Report Output options. Determines the format of how the data will be reported.

The screenshot shows the 'Custom Title' text field and the 'Output Type' dropdown menu set to 'Detail'.

More output options. Most reports have a summary or detail output type. Customer Title is a free form field and will print at the top of the report.

Default Settings

Resets the report back to it's default state. Useful if you have problems with a reports output based on previous criteria set. .

Last Settings

Resets the report to the "Last" settings you ran it with.

Report Templates

Used to manage/apply Report Templates. See the 'RecTrac 3.1 Report Templates' doc for more info.

Process

Runs the report.

Prev

Next

Cycles through the advanced criteria screens in the upper left.

RecTrac 3.1 Running Sales Reports



Running Sales Reports – cont.

Output Group ⓘ All Outputs Add Output Custom Title ⓘ **The Brig Top Sellers**

Output Template * ⓘ VSI - Top Selling Inventory by Quantity Update Output Output Type ⓘ Summary

Since I want to know my best selling items, the 'VSI – Top Selling Inventory by Quantity' will give me this answer, so that is my 'Output Template'.

I am also giving this report a 'Custom Title'.

This report only has one 'Output Type', which is Summary.

Step 4: Click 'Process' to run the report. The following screen will display:

Report Options ⓘ ? ✕

File Format

- PDF ⓘ Print Selection Criteria ⓘ
- CSV (Raw Data) ⓘ
- XML ⓘ

Schedule Only Options

- Dashboard Chart or Table ⓘ

Output Options

- Print Report ⓘ
- Preview Report ⓘ
- FTP Report ⓘ

Generic / Text Only

Send Report Debug Email To ⓘ

The report format defaults to PDF and to Preview the report. Reports should always be previewed so they can be reviewed BEFORE printing.

Click Continue to generate the report. The following message will display.

Success ✕

Report sent to server for processing. Check the notification center for completed reports.

Close

Click 'Close'. Your report will display when it's finished running.

RecTrac 3.1 Running Sales Reports



Running Sales Reports – cont.

Step 5: Below is the 1st page of the output for this report. From the preview window, I can choose to print or save the report as needed.

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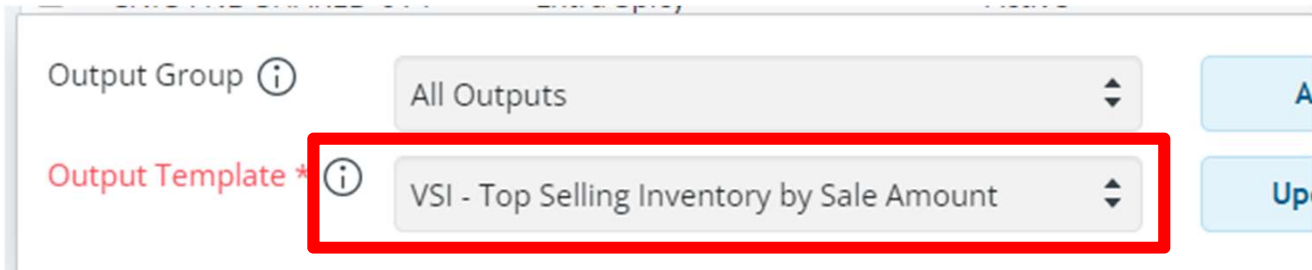
Inventory Code	Description	Sale Qty	Sale Amt
MA1256-10-108-021	***American	435	0.00
MA1256-10-114-001	Make It A Combo	376	940.00
MA1256-10-108-023	***Cheddar	367	0.00
MA1256-10-100-004	Breakfast Sandwich	365	1,095.00
MA1256-10-108-025	***Fries	311	0.00
MA1256-10-108-030	**\$Gatorade	252	252.00
MA1256-10-108-043	***Pepper Jack	249	0.00
MA1256-10-100-012	Hard Boiled Eggs	247	247.00
MA1256-10-116-005	Chicken Tender	222	1,110.00
MA1256-10-108-022	***Provolone	204	0.00
MA1256-10-116-004	French Fries	194	388.00
MA1256-10-100-005	Breakfast Burrito	192	960.00
MA1256-10-108-009	**\$Cheese	183	183.00
MA1256-10-108-004	**\$Sausage	176	352.00
MA1256-10-116-001	Side of Meat	157	314.00
MA1256-10-108-024	***Crispy Chicken	157	0.00
MA1256-10-108-020	***Sausage	156	0.00
MA1256-10-108-003	**\$Bacon	148	296.00
MA1256-10-107-002	Bottled Soda	147	367.50
MA1256-10-108-002	***Croissant	143	0.00
MA1256-10-108-001	***Biscuit	130	0.00
MA1256-10-107-007	Juice	126	378.00
MA1256-10-117-006	Philly Cheesesteak	120	840.00
MA1256-10-116-002	Side of Potates	107	214.00
MA1256-10-108-028	***Fountain Drink	106	0.00
MA1256-10-117-009	Buffalo Chicken Ranch Wrap	98	686.00
MA1256-10-100-002	USS Delaware Breakfast	96	576.00
MA1256-10-117-010	Chicken Ranch Wrap	95	665.00
MA1256-10-116-003	Side of Toast	95	95.00
MA1256-10-100-001	USS Chesapeake Omelet	65	390.00
MA1256-10-115-001	Chips	61	91.50
MA1256-10-108-010	**\$Tomatoes	60	30.00
MA1256-10-108-041	***No Tomato	58	0.00
MA1256-10-104-001	Lunch Special	58	638.00
MA1256-10-117-008	Club Sandwich	55	357.50
MA1256-10-100-006	Philly Breakfast Burrito	55	385.00
MA1256-10-108-008	**\$Crispy Chicken	53	132.50
MA1256-10-108-027	**\$Onion Rings	53	53.00
MA1256-10-107-001	Fountain Soda	51	102.00
MA1256-10-108-027	***No Cheese	40	0.00

RecTrac 3.1 Running Sales Reports



Running Sales Reports – Alternative Output

Now that I know what my best selling items by QUANTITY are, how can I tell what my best selling items by SALES AMOUNT would be? Building off the previous example, I can find this info by making a single change to my 'Output Template'.



All my other report criteria (item range, date range etc.) would remain the same. I only want to change the OUTPUT of the data. I would also possibly update my 'Custom Report Title'.

Here is the report run for 'Top Selling by Sales Amount'

RecTrac Page: 1 of 3

The Brig Top Sellers

Top Selling Inventory by Sale Amount

Inventory Code	Description	Sale Qty	Sale Amt
MA1256-10-116-005	Chicken Tender	222	1,110.00
MA1256-10-100-004	Breakfast Sandwich	365	1,095.00
MA1256-10-100-005	Breakfast Burrito	192	960.00
MA1256-10-114-001	Make It A Combo	376	940.00
MA1256-10-117-006	Philly Cheesesteak	120	840.00
MA1256-10-117-009	Buffalo Chicken Ranch Wrap	98	686.00
MA1256-10-117-010	Chicken Ranch Wrap	95	665.00
MA1256-10-104-001	Lunch Special	58	638.00
MA1256-10-100-002	USS Delaware Breakfast	96	576.00
MA1256-10-100-001	USS Chesapeake Omelet	65	390.00
MA1256-10-116-004	French Fries	194	388.00
MA1256-10-100-006	Philly Breakfast Burrito	55	385.00
MA1256-10-107-007	Juice	126	378.00
MA1256-10-107-002	Bottled Soda	147	367.50
MA1256-10-117-008	Club Sandwich	55	357.50
MA1256-10-108-004	**\$Sausage	176	352.00
MA1256-10-116-001	Side of Meat	157	314.00
MA1256-10-108-003	**\$Bacon	148	296.00
MA1256-10-103-002	Chicken Salad	40	280.00
MA1256-10-108-030	**\$Gatorade	252	252.00
MA1256-10-100-012	Hard Boiled Eggs	247	247.00
MA1256-10-100-003	USS Ralieggh CFS and Eggs	26	234.00
MA1256-10-116-002	Side of Potatoes	107	214.00
MA1256-10-117-005	Chicken Bacon and Ranch Panini	34	204.00
MA1256-10-105-002	BYO Double Cheeseburger	34	204.00
MA1256-10-108-009	**\$Cheese	183	183.00
MA1256-10-103-003	Chef Salad	20	160.00
MA1256-10-105-001	BYO Cheeseburger	32	160.00
MA1256-10-100-010	Biscuit and Gravy	27	135.00
MA1256-10-108-008	**\$Crispy Chicken	53	132.50
MA1256-10-107-006	Energy Drink	39	117.00
MA1256-10-117-001	Turkey Panini	23	115.00
MA1256-10-117-011	BBQ Sandwich	21	105.00
MA1256-10-107-001	Fountain Soda	51	102.00
MA1256-10-107-004	Gatorade	34	102.00
MA1256-10-116-003	Side of Toast	95	95.00
MA1256-10-116-006	Onion Rings	31	93.00
MA1256-10-115-001	Chips	61	91.50
MA1256-10-100-009	Short Stack	20	80.00
MA1256-10-117-004	BBQ Panini	13	65.00