

SynergySuites Custom Reporting

Overview:

In addition to the stock reports available in Synergy, there are many ad hoc reports that can be used to analyze your business in more detail. These reports have various filters and focus. They are not eligible for email distribution and are only available for above store level users.

How to Access:

- 1) Log Into SynergySuite
- 2) Click on the Dashboards Tab
- 3) Once in Dashboard Home, find the tab that the reports are listed under.



Location	Report Name	Description	Notes
Analytics Tab	Discount Trend Per Location per Week YoY	Breaks down discounts per week YoY for years running.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	FOH Server Summary Report	This report is like the old server summary from Micros. Has all FOH employee's sales data, discount data, voids, Check Average, and more.	<ul style="list-style-type: none"> • It will auto populate to last week's report and all stores you have access to. • Adjust date/stores as needed. • To Print, Click PDF, then Fit everything on 1 sheet wide & Landscape.
	Discount Percentages Gross & Net Sales per Location	Breakdown of location(s), gross & net sales, discounts total and discount percentage.	<ul style="list-style-type: none"> • It will auto populate to the previous week date, and all stores you have access to. • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Discount Report by Location (All Discounts)	This report shows all locations, and all discounts used at that location during a specified period.	<ul style="list-style-type: none"> • It will auto populate to the previous week date, and all stores you have access to. • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Discounts by Store & Employee	This report shows all locations, and all discounts used at that location by specific employees during a specified period.	<ul style="list-style-type: none"> • It will auto populate to the previous week date, and all stores you have access to. • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file.
	Standard Non-Menu Promo Discounts	Reports all Standard non menu promo discounts to track per location.	<ul style="list-style-type: none"> • It will auto populate the stores you have access to. • Change date to the dates you'd like to see. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Bank Reconciliation	Report showing movement of cash throughout a specified period of time. Breaks down to what your Revel Cash Due House is verses what your expected deposit should be and what your entered deposit is based on SynergySuite Cash Management Module.	<ul style="list-style-type: none"> • It will auto populate to previous week and all stores you have access to. • To export – use export to Cross Tab, this will download into an excel file.
	Loyalty Redemption by Store & Employee	Shows loyalty rewards per employee per check.	<ul style="list-style-type: none"> • This will default to the stores you have access to see with a period of the previous week. • Change Dates as needed • Recommend exporting to Cross Tab and CSV or PDF depending on the number of locations & how many redemptions.
	Payment Reconciliation Report	This report walks through all payments for an auto-populated date of a week at a time. It shows all sales modes broken apart.	<ul style="list-style-type: none"> • It will auto populate for the previous week, can be adjusted & for all outlets you have access to. • Recommended export using Cross Tab
	Product Cost of Goods by main PLU/Product with all Modifiers	Product Cost of Goods Report that will show the main Product PLU with all modifiers rung in. Includes a Void Column.	<ul style="list-style-type: none"> • Can be rung per location or per franchise group for any period. • Recommend downloading by Cross Tab into Excel

Location	Report Name	Description	Notes
Sales Tab	15 Minute Sales Intervals	Synergy Generated Visual of check stats during 15-minute periods for discounts, customer count, net sales, service charges, tips, voids. Can choose stores and dates.	<ul style="list-style-type: none"> Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
	Corporate Sale Analysis	Synergy Generated Visual Sales Analysis for a selected date Has multiple tabs for different visuals (Daily trend, YOY growth, Comp Sales, etc)	<ul style="list-style-type: none"> Visual Report only. Don't Recommend Exporting. Can Adjust date range. Multiple Tab
	Hourly Sales	Synergy Generated This is a visual report of hourly check stats. Can be one date or multiple dates	<ul style="list-style-type: none"> Visual Report only. Don't Recommend Exporting. Can Adjust date range. Multiple Tab
	Sales Checks Analysis	Synergy Generated This is a visual report of sales checks.	<ul style="list-style-type: none"> Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
	Payment Analysis	Synergy Generated This is a visual report of payment types.	<ul style="list-style-type: none"> You can choose the date and stores
	Sales Trend Roll Up	Shows Sales trend rollup by sales mode YOY.	<ul style="list-style-type: none"> This will auto populate to the current Quarter that we are in. Pick and choose what store(s) you'd like to see.
	Day Part Comparison Day to Day	This is a dashboard that will show locations sales for the current year , then location sales for last year and then a comparison for the selected dates.	<ul style="list-style-type: none"> It will auto populate the stores you have access to. Change date to the dates you'd like to see. Note: This was created to be a visual tab. If you export, it is recommended to pick 1 location at a time, export to PDF using the following parameters: <ul style="list-style-type: none"> Include "This view" Scaling "at most 1 page wide" Page Size "letter" Orientation "landscape"
	Day Part Comparison TY/PY Percentage	This report breaks down the day part comparison from this year to last year and shows a percentage difference.	<ul style="list-style-type: none"> Note: This was created to be a visual tab. If you export, it is recommended to pick 1 location at a time, export to PDF using the following parameters: <ul style="list-style-type: none"> Include "This view" Scaling "at most 1 page wide" Page Size "letter" Orientation "landscape"
	Sales / Qty per Item	This PMIX report will give you a Quantity sold for any item for a specific period.	<ul style="list-style-type: none"> It will auto populate all stores you have access to Update dates to be the period you are looking for, it will default to last week. To export you can either export to PDF or Export Cross Tab depending on the number of stores you have selected.
	Sales Mode Breakdown	Sales mode breakdown by day. Choose your period, location and sales mode.	<ul style="list-style-type: none"> Adjust date/stores as needed. To export – use export to Cross Tab, this will download into an excel file. Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Sales Type Yearly	Breakdown sales per month for a year(s) at a time. Can select different sales modes or all sales modes.	<ul style="list-style-type: none"> Adjust date/stores as needed. To export – use export to Cross Tab, this will download into an excel file. Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
Sales by Day Part and Sales Mode	Sales mode breakdown by day. Choose your location and sales mode but adds in Day Part. You pick the starting and end date.	<ul style="list-style-type: none"> Note: This was created to be a visual tab. If you export, it is recommended to pick 1 location at a time, export to PDF using the following parameters: <ul style="list-style-type: none"> Include "This view" Scaling "at most 1 page wide" Page Size "letter" Orientation "landscape" 	

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Daily Summary Tab	Group Daily Summary	Synergy generated reprot for visual for multiple KPI's	• Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
	Sales and Wages with Weather Metrics	Synergy generated reprot for visual for sales with weather	• Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
	YOY Comparison	Synergy generated reprot for visual YoY growth	• Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
HRM Tab	Census Report	Description: Built to show all employees at specified locations with their name, email, birthdate, zip code, payment type, hire date, termination date if applicable, total hours and total wage.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Employee List	Description: Report showing all employees, outlets, primary section, current status, gender, DOB, Start Date, Term Date if applicable, Payment Type, and pay rate as applicable.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Staff Audit V2	Description: Includes all the above, plus if they are minor or not, email, zip code.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Total Hours Audit	Description: this report shows the total hours for each employee. Will show hours per month for each employee.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width
Purchasing Tab	Order Guide Units/UOM/QTY Used	Description: This will give you an order guide with Units of Measure and Quantity of the usage used for a specific period.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width
	Purchasing vs Deliveries	Description: This will show you the difference between the order and delivery for a specific week per posting group	<ul style="list-style-type: none"> • Note: you can also find this report for "by store, multiple weeks". • Adjust date/stores as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Specific items per distro all history	Description: This will show you specific items purchased over a period for selected stores/distro's etc.	<ul style="list-style-type: none"> • Adjust date/stores as needed and items as needed. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
Inventory Tab	PMIX Per Location with Sales Mode	Description: This is a product mix report that breaks down the products sold via sales mode for a specific period.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • You can search for a specific item or see all the items. • Can search by specific sales mode as well. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Pmix per Location	Description: This is a searchable report that has all products that are sold in Revel. You can search for a product or a modifier, by a specific date for any location.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • You can search for a specific item or see all the items. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Pmix by week all products w/filters	Description: This is a searchable report that has all products that are sold in Revel. You can search for a product or a modifier, broken down by week, sales mode, etc.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • You can search for a specific item or see all the items. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Usage \$ by Posting Group/Products per QTR	Description: Expected and actual usage with a variance of each item shown over each quarter. It can be used as posting groups or items.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • You can search for a specific item or see all the items. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.

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Financials Tab	Tax/Untaxed & 3pv payments	Description: Breakdown of sales mode taxed vs untaxed and payment types.	<ul style="list-style-type: none"> • Recommendation: this was created as a dashboard to view, one location at a time. Pick Month and Outlet that you'd like to look at. If you export, it is recommended to pick 1 location at a time, export to PDF using the following parameters: • Include "This view" • Scaling "at most 1 page wide" • Page Size "letter" • Orientation "landscape"
	Third Party Tax Reconciliation by Day	Description: Shows breakdown of sales/tax/service fees for all 3PV types by day at a time.	<ul style="list-style-type: none"> • Adjust date/stores as needed. • You can search for a specific item or see all the items. • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Gift Card Sales	Description: Shows all gift card sales made by locations in a year. Goes back 3 years.	<ul style="list-style-type: none"> • To export – use export to Cross Tab, this will download into an excel file. • Recommend highlighting the entire file by clicking on the corner icon in excel, then format, autofit column width.
	Percentage of Discounts YTD	Description: Reports Total Discounts vs Net Sales for current YTD	<ul style="list-style-type: none"> • Note: Can change the period to be previous day/week/month/quarter/year. • Will auto populate to Current Year and stores you have access to.
	Weekly royalty report	Description: Weekly Sales minus VDC	<ul style="list-style-type: none"> • Note: Can change the period to be previous day/week/month/quarter/year. • Will auto populate to previous week. and stores you have access to.