

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.
- 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	3rd Party Order Reconciliation	shows all 3rd party orders with check subtotal, taxes and check total so you can compare to specific invoices etc	•Pick the store and month you'd like to view •Recommended export using Cross Tab
	Bank Reconciliation (by store or group)	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.	•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.
	DD Drive Reconciliation	Shows all DoorDash Drive Orders with details so you can compare to the DD Invoice monthly	•Pick the store and month you'd like to view •Recommended export using Cross Tab
	Deposit Reconciliation	Single Store or Group Rec Deposits. Combines Ayden, Expected Deposit, 3PV. This isn't the store deposit but above store level deposit rec	•Pick the store and Date you'd like to view •Recommended export using Cross Tab
	Discount % by Grouped Discounts	Shows a discount analysis based a set of grouped discounts across months at a time and by store.	•Pick the store and Date you'd like to view •Recommended export using Cross Tab
	Discount Analysis	This report shows all locations, and all discounts used at that location during a specified period.	•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 Percentages Gross & Net Sales per Location	Breakdown of location(s), gross & net sales, discounts total and discount percentage.	•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 Trend Per Location per Week YoY	Breaks down discounts per week YoY for years running.	•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.	•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.
	Discount by Controllable & Sales Mode Groups	Grouped discounts that are into controllable and uncontrollable buckets to help ID possible issues. Shows dollar amounts and percents by store and by employee. Also by sales mode.	•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.
	FOH Server Summary Report - Multi Tabs & Multi Reports	This report is like the old server summary from Micros. Has all FOH employee's sales data, discount data, voids, Check Average, and more.	•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.
	Multi Store Cash Over/Short	This pulls together a bank Reconciliation for all cash items as well as online payments	•It will auto populate for the previous week, can be adjusted & for all outlets you have access to. Recommend to pick only 1 store at a time for a date range •Recommended export using Cross Tab
	Payment Reconciliation Report (by store or group)	This report walks through all payments for an auto-populated date of a week at a time. It shows all sales modes broken apart.	•It will auto populate for the previous week, can be adjusted & for all outlets you have access to. Recommend to pick only 1 store at a time for a date range •Recommended export using Cross Tab
	Table Turn Time Report (Milti Tab)	Multi tab report that breaks down table turn time from Franchise Group down to Employee	•It will auto populate to yesterday as a date range but can be adjusted & for all outlets you have access to. Recommend to pick only 1 store at a time for a date range •Recommended export using Cross Tab
	Void/Return/Refund Report (multi tab)	Report is multi tab way to ook at all checks that have a void, return, or refund on it. Will show by employee, check number etc and can look at just one store at a time	•Pick the store and Date you'd like to view •Recommended export using Cross Tab

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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.	• 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)	• Visual Report only. Don't Recommend Exporting. Can Adjust date range. Multiple Tab
	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.	•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: •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.	•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: •Include "This view" •Scaling "at most 1 page wide" •Page Size "letter" •Orientation "landscape"
	Hourly Sales	Synergy Generated This is a visual report of hourly check stats. Can be one date or multiple dates	• Visual Report only. Don't Recommend Exporting. Can Adjust date range. Multiple Tab
	Payment Analysis	Synergy Generated This is a visual report of payment types.	•You can choose the date and stores
	Sales Checks Analysis	Synergy Generated This is a visual report of sales checks.	• Visual Report Only. Don't Recommend Exporting. Can Adjust Date & Location. Multiple Tabs
	Sales Item Tracking Over Weeks at a time	Report picks one item over a period of time to show all gross sales, quantity and net sales	•Adjust date/stores/ Product 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 Mode Breakdown (Net Sales and % of total Sales)	Report shows all sales mode breakdown per date range picked with Net Sales and % of sales mode	•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 Mode Breakdown (multi tab)	Sales mode breakdown by day. Choose your period, location and sales mode.	•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 Trend Roll Up	Shows Sales trend rollup by sales mode YOY.	•This will auto populate to the current Quarter that we are in. •Pick and choose what store(s) you'd like to see.
	Sales YOY and Weekly Comparison	Viewable Dashboard on Comparison	Viewable Dashboard on Comparison
	Sales by Day Part (Multi Tab)	Sales Mode Breakdowns by Day Part in Multiple Tabs	•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 / Qty per Item	This PMIX report will give you a Quantity sold for any item for a specific period.	•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.
	VDC Weekly Sales by Store	Breakdown of VDC Sales	•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.

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Daily Summary Tab	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
	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
HRM Tab	Census Report	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.	- 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	Report showing all employees, outlets, primary section, current status, gender, DOB, Start Date, Term Date if applicable, Payment Type, and pay rate as applicable.	- 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	Includes all the above, plus if they are minor or not, email, zip code.	- 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.
	OT Report	Report showing All Employees who have OT during a choose time period	- Adjust date/stores as needed. - To export – use export to Cross Tab, this will download into an excel file.
	Total Hours Audit	this report shows the total hours for each employee. Will show hours per month for each employee.	- 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
	Totally Monthly Hours Audit	Shows total hours by employee per month	- 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
	Order Guide Units/UOM/QTY Used	This will give you an order guide with Units of Measure and Quantity of the usage used for a specific period.	- 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	Purchasing vs Deliveries	This will show you the difference between the order and delivery for a specific week per posting group	- 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	This will show you specific items purchased over a period for selected stores/distro's etc.	- 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.
	Ordering / Delivery Posting Group (multi tab)	Shows order/delivery by Posting Group with variance in different tabs (by totals, by store, by posting group and products)	- 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	Pay Outs by Month and Reason	Shows all payouts that stores did for a specific period of time	- 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.
	Consolidated Gap Report (Multi tab)	Report of top 20/ bottom 20 for all locations, single store tab and then all full gap at all locations as well	- 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.
	Dollar Usage by Item & Group	Expected and actual usage with a variance of each item shown different tabs	- 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	Food Cost Report	Report shows Gross Sales, Expected Usage, Actual Usage, % etc.	- 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.
	Pmix by week all products w/filters	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.	- 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.
	Product Mix Multi Tab	Report cane be used to each what products are sold via date and sales mode per location.	- 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	Shows all gift card sales made by locations in a year. Goes back 3 years.	- 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	Reports Total Discounts vs Net Sales for current YTD	- 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.
	Single Store Deposit Rec	Report used for validating by day all rec's for a single store	- Pick Date Range and Outlet - Export to Cross Tab
	Tax Report - By Mode & Month	Report showing all the sales mode types and tax totals collected per mode	- Pick Date Range and Outlet - Export to Cross Tab
	Tax/Untaxed & 3pv payments	Breakdown of sales mode taxed vs untaxed and payment types.	- 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	Shows breakdown of sales/tax/service fees for all 3PV types by day at a time.	- 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.
	Weekly royalty report	Weekly Sales minus VDC	- 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.
Loyalty Tab	Yearly Sales By Week	Shows all sales by report per store for a year at a time	- Will default to current year - Will auto populate to previous week. and stores you have access to.
	Yearly VDC Sales	Shows all sales by report per store for a year at a time	- Will default to current year - Will auto populate to previous week. and stores you have access to.
	Loyalty Redemptions Searchable (by employee & Reward Memer)	Report showing all loyalty redemptions. Can use the tab by employee & reward or by Reward member	- 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.
	Lunchbox Discounts per Store	Report showing all Lunchbox Reward Redemptions (and wallet drops) across stores for a selected period of time	- 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
	Lunchbox Discounts Per Month	All Lunchbox discounts by month (includes loyalty, lsm, wallet drops etc)	- 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
	Loyalty Sales vs Discounts Report		