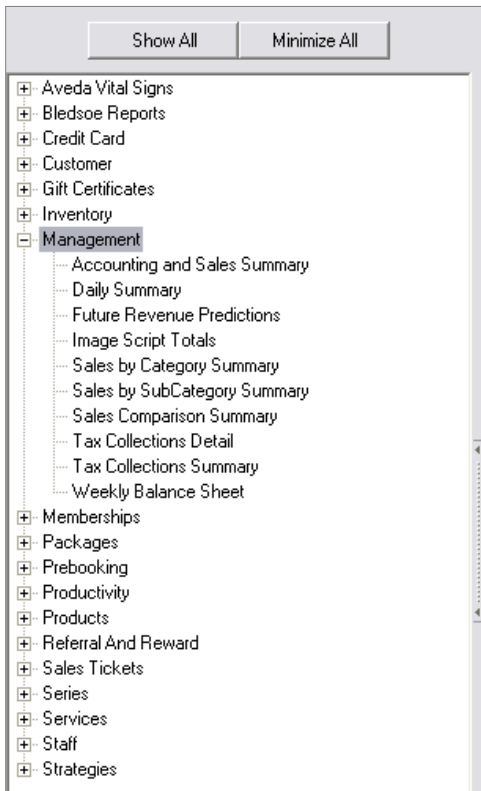


# management reports

Use this guide as a reference tool for the top management reports.



## Daily Summary Report

*The Daily Summary report provides you with a summary of the day's activity. It is typically used for reconciliation at the end of the day, tracking sales and ticket averages, and tracking sales by category.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Daily Summary from the report list side navigation. You will find it under the Management category.
3. Enter the date range.

## Accounting and Sales Summary Report

*The Accounting and Sales Summary report provides you with a summary of the activities for each day in a week. It is a side-by-side comparison report. It can also be created monthly.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Accounting and Sales Summary report (weekly) the report list side navigation. You will find it under the Management category.
3. Enter the ending date of the week.

## Future Revenue Predictions Report

*The Future Revenue Predictions report provides you dollar amount associated with the appointments you currently have booked for the date range chosen.*

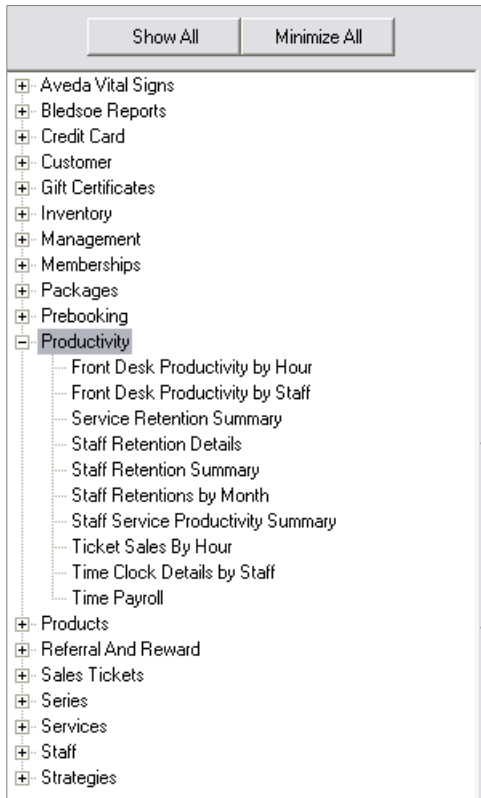
1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Future Revenue Predictions the report list side navigation. You will find it under the Management category.
3. Enter the date range.

## Sales Comparison Summary Report

*The Sales Comparison Summary report gives you sales for this year, last year and the year prior in a comparison format.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Sales Comparison Summary the report list side navigation. You will find it under the Management category.
3. Enter the date range.





## Weekly Balance Sheet Report

*The Weekly Balance Sheet report should be run on a weekly basis in order to have the days of the week displayed side by side. This will allow you to easily determine the busiest days of the week.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Weekly Balance Sheet the report list side navigation. You will find it under the Management category.
3. Enter the date range.

## Front Desk Productivity By Hour Report

*The Front Desk Productivity By Hour report will display the hours of the location. This report is used to determine front desk staff schedule. Security must be set in order to effectively run this report.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Front Desk Productivity by Hour from the report list side navigation. You will find it under the Productivity category.
3. Enter the date range.

## Ticket Sales By Hour Report

*The Ticket Sales By Hour report can be used to see how and at what times the front desk is busiest. Ticket sales are recorded when the ticket is processed.*

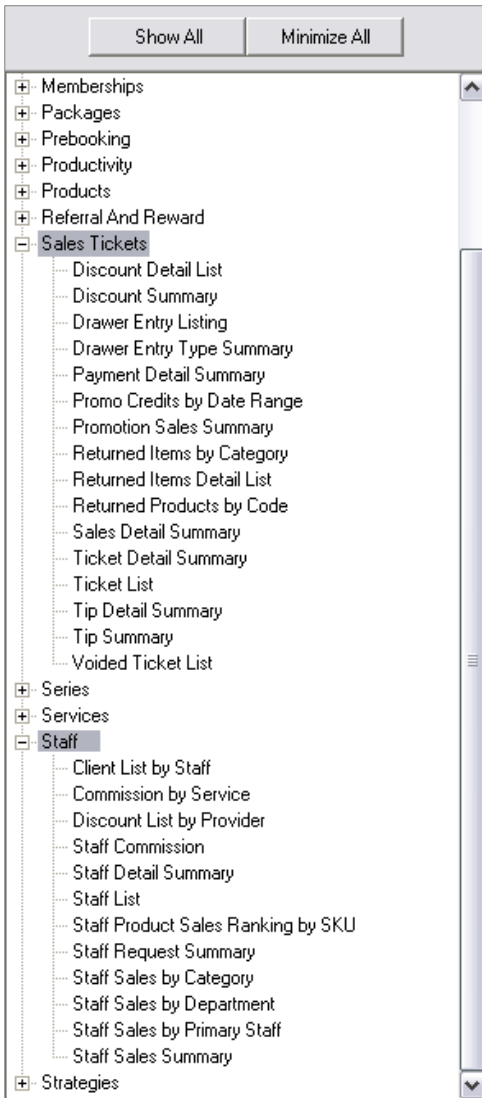
1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Ticket Sales By Hour the report list side navigation. You will find it under the Productivity category.
3. Enter the date range.

## Time Clock Details By Staff Report

*The Time Clock Details by Staff report allows you to view the time clock details per staff member and gives you a grand total of hours worked.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Time Clock Details by Staff the report list side navigation. You will find it under the Productivity category.
3. Enter the date range.
4. Select from the drop down menu if you would like the report to print one page per staff member.
5. Click the Ok button.
6. Select staff to view.
7. Click the Ok button.





## Discount Summary Report

*The Discount Summary report lists all of the discounts used for a particular time frame. The report will group the discounts into one field and will note the number of tickets that were discounted using that code. Use this report to track all discounts and promotions.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Discount Summary the report list side navigation. You will find it under the Sales Tickets category.
3. Enter the date range.

## Tip Summary Report

*The Tip Summary report will list all staff members who have received a tip in the selected date range. This report also lists tips, paid tips and grand totals for both.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Tip Summary the report list side navigation. You will find it under the Sales Tickets category.
3. Enter the date range.

## Staff Commission Report

*The Staff Commission report will display service and retail totals in addition to the actual commission due to the staff member.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Commission the report list side navigation. You will find it under the Staff category.
3. Enter the date range.

