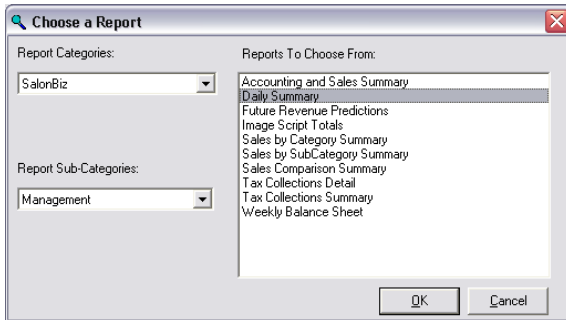


management reports

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. Click on the Open button.
3. Select Management in the Report Sub-Categories field.
4. Select the Daily Summary report.
5. 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. Click on the Open button.
3. Select Management in the Report Sub-Categories field.
4. Select the Accounting and Sales Summary report (weekly).
5. 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. Click on the Open button.
3. Select Management in the Report Sub-Categories field.
4. Select the Future Revenue Predictions report.
5. 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.

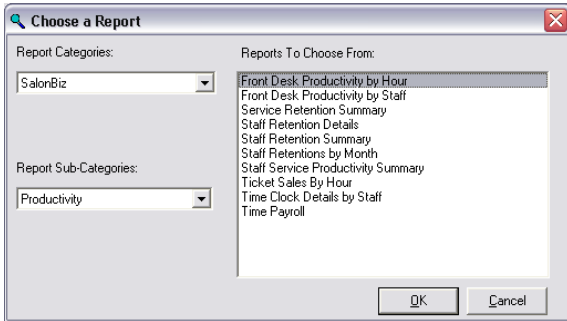
1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Click on the Open button.
3. Select Management in the Report Sub-Categories field.
4. Select the Sales Comparison Summary report.
5. Enter the date range.



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. Click on the Open button.
3. Select Management in the Report Sub-Categories field.
4. Select the Weekly Balance Sheet report.
5. 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. Click on the Open button.
3. Select Productivity in the Report Sub-Categories field.
4. Select the Front Desk Productivity by Hour report.
5. 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.

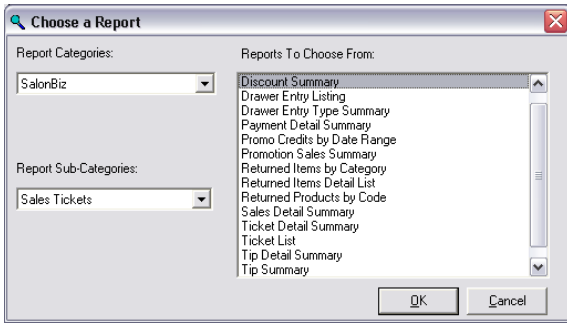
1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Click on the Open button.
3. Select Productivity in the Report Sub-Categories field.
4. Select the Ticket Sales By Hour report.
5. Enter the date range.

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. Click on the Open button.
3. Select Productivity in the Report Sub-Categories field.
4. Select the Time Clock Details by Staff report.
5. Enter the date range.
6. Select from the drop down menu if you would like the report to print one page per staff member.
7. Click the Ok button.
8. Select staff to view.
9. Click the Ok button.





Discount Summary Report

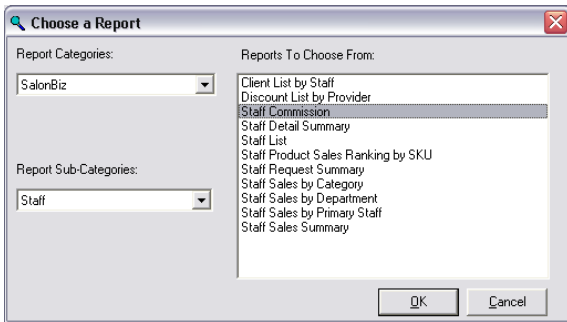
The Discount Summary report lists all of the discounts used for a particular time frame. The report will group the discounts into one field and will note the number of tickets that were discounted using that code. Use this report to track all discounts and promotions.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Click on the Open button.
3. Select Sales Tickets in the Report Sub-Categories field.
4. Select the Discount Summary report.
5. 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. Click on the Open button.
3. Select Sales Tickets in the Report Sub-Categories field.
4. Select the Tip Summary report.
5. 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. Click on the Open button.
3. Select Staff in the Report Sub-Categories field.
4. Select the Staff Commission report.
5. Enter the date range.

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