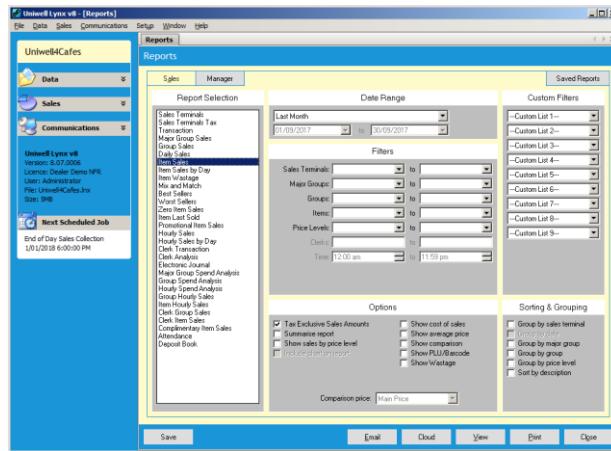


## Topic: CONFIGURING REPORTS IN UNIWELL LYNX

Uniwell Lynx has a large number of reports that are based on data retrieved from your POS terminals or, for those using stock control, stock transactions that you have performed in the software. Understanding the various ways you can customise your reports will help you to tailor your system to suit how you want to analyse your business.



FAQ What are the basic ways to customise a report?

- **Date Range** – various preset date ranges are available for reports based on sales and transactional data. These allow you to quickly choose the dates you want your report based on – such as 'Month to Date' or 'Last Week'. The 'Custom Date' option allows you to choose a specific date range on which you want the report to be based
  - Bear in mind that sales data is assigned to the date the batch is associated with at the time of collection, and not necessarily the date on which it was physically retrieved from the POS
- **Filters** – Filters allow you to narrow down your report to a specific range that relates to your report. You can therefore analyse a section of your item database
  - For instance, you might want to view various sales reports based on a specific group, so you can analyse the success of your marketing and promotions relating to those products
- **Sorting and Grouping** – These options allow you to change the way that data is presented on your report
  - For instance, you might want to view a sales report grouped by Sales Terminal, so you can see what items are selling at each of your POS terminals
- **Options** – Some reports have specific options available that allow you to vary the data being viewed.
  - Several reports (eg. Group and Clerk Sales reports) have an optional chart that can be added to the report, giving you a visual aid that accompanies the figures displayed on the report

**Note:** Not all customisation methods are available for all reports, depending on what the report function is and what data it is built from.

FAQ How can I find out what reports I need?

- Probably the best way to do this is by trial and error – view a specific report using various options and decide which one suits the way you want to analyse your business
- If you have a specific idea of what you want to see on a report but don't know whether it can be achieved, feel free to ask your Lynx Software support provider. LynxAssist Subscribers can contact POSLynx for assistance

FAQ If I like a set of customisation options for a report, can I save them so that I can run the same report consistently?

- Yes. Once you have selected your desired customisation options, click on the 'Save' button (bottom left of your screen)
- Give the 'Saved Report' an intuitive name – eg. 'Group Sales Report for Last Week'
- You can then go to the 'Saved Reports' tab of the report screen at any time and select your saved report, which will be generated with the currently applicable information based on your preconfigured customisation

**Note:** A key feature of Uniwell Lynx is the ability to schedule the cloud export/email of saved reports. So once you have configured several saved reports, you can automate them being sent to you on a daily, weekly or monthly basis.