

	Title: Standard Operating Procedure (SOP) for Generating Financial and Inventory Reports from ADM 365	Element: ADM Reporter Access Reporting
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To access the reporting feature of ADM 365 as an assigned reporter for a location or locations

- <https://adm.365retailmarkets.com/public/login>
- Sign in with Email and Password
- Click Reports on the top taskbar and choose the report you would like to access

## 1. Daily Sales Summary Report

- **Purpose:** Displays daily sales over a selected date range.
- **Steps:**
  1. Select the date range.
  2. Select location
  3. Review key metrics:
    - **Date:** Date of transactions.
    - **Transactions & Item Count:** Number of transactions and items sold.
    - **Sales, Taxes, Deposits, Discount:** Breakdown of sales totals.
    - **Total Sales:** Combined total of all financial factors.
    - **Consumer Count:** Transactions completed via GMA accounts.

## 2. Product Sales Report

- **Purpose:** Shows how much of each product is sold.
- **Steps:**
  1. Select a product and date range.
  2. Select location
  3. Review:
    - **Product Name, Scancode, Cat 1-3:** Product identifiers and categories.
    - **Qty Sold & Total Price:** Quantity sold and revenue.
    - **Case Count:** Number of items sold in cases.

## 3. Sold Detail Report

- **Purpose:** Displays all items sold from the market.
- **Steps:**
  1. Generate the report for selected dates.
  2. Select location
  3. Review:
    - **Location, Device, Transdate:** Location and device info.
    - **Product Name, Scancode, Customer:** Product and customer data.

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- **Pay Method, Price, Discount:** Payment method and pricing.

## 4. Transaction Canned Report

- **Purpose:** Compares account transactions with credit card transactions.
- **Steps:**
  1. Select a date range.
  2. Select location
  3. Review:
    - **Transactions, Sales Units:** Total transactions and units sold.
    - **Account vs Credit Transactions:** Comparison of payment types.
    - **Credit Comparison:** Percentage comparison of account and credit transactions.

## 5. Sales Analysis Report

- **Purpose:** Analyze product performance.
- **Steps:**
  1. Filter data by category or product.
  2. Select location
  3. Review:
    - **Sold, Gross, Net:** Product sales performance.
    - **Tax, Deposit:** Associated costs.
  1. Review:
    - **Sales, Product Cost, Spoil/Damaged \$:** Sales and loss data.
    - **Over & Short:** Inventory adjustments.

**The reports mentioned above are the most frequently used, but additional reports are available as well. All reports can be exported in either print or Excel formats. Additionally, you can schedule reports to be emailed to you on a daily basis by running the desired report and clicking the 'Schedule Reports' button.**

### Revision History:

Revision	Date	Changes	Requested By

# Canteen Kitchens

Standard Operating Procedures

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