FAQs

Payment Reporting

How is Payment Reporting different to Sales Reporting?

These reports rely on 'payment date' and 'payment values.' While the total value of a Sales Order is recorded at the date and time the order is placed, payments function differently. Payments are logged individually as they occur, often with varying amounts, since multiple payments can be made for a single order. This approach ensures the reports reflect actual money coming into the business, including partial payments and adjustments. Additionally, refunds are also recorded in the reports, providing a clear view of both incoming revenue and money returned to customers.

> 'Payment Date' for pending payment (e.g. finance orders) will be taken as the date that the payment was completed

Real Time Data

Are the reports up to date?

All reports show a snapshot of data at the instant that they were generated. As such, they are always up to date.

The value of a Sales Order has changed; how will this be reflected in the reporting?

With the exception of Sales by User, all revenue reporting is done based on the Sales Order date. That means that a Sales Order that has a date of the 1st of October will always report its revenue

as the 1st of October, even if new lines are added on the 1st November.

The Salesperson on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by User report.

The Store on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by Channel report.

General

Are Reports sortable?

All reports are sortable - simply click on the headers.

Can a report be exported?

All reports are exportable as a CSV.

Why are some results 'N/A' or simply blank?

This will be due to missing information, e.g. products that are sold which have not been assigned to a Department, or to a Brand with a blank entry in the name.

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