

Report Module

Version 7 Polling Feature

PC/POLL SYSTEMS is proud to announce the addition of our newest deluxe feature: **Report Module**. With Report Module users can quickly tabulate and view the following PLU reports:

- ✓ Top to Low Sellers by Quantity
- ✓ Low to Top Sellers by Quantity
- ✓ Top to Low Sellers by Amount
- ✓ Low to Top Sellers by Amount
- ✓ Zero Sellers
- ✓ Sort by PLU/UPC Code
- ✓ Margin reporting
- ✓ Item 12 week History

All reports allow users to select a date range, store range, machine range, register (satellite) range, poll type (X, Z or both), and poll area (area 1 – 5 or all). Based upon the selected options, Report Module will search through all previously collected PLU report data and tabulate the values on demand. The data can be tabulated for only 1 store or for several and support is available, for select register modules, to consolidate across cash register models. Reports can be viewed, printed, exported to text file, exported to Excel, exported report to file, and exported to Adobe PDF. The History report also includes a graphing option.

Setup and System Requirements

- ❑ Version 7 Polling
- ❑ Fully saved register program
- ❑ Previously collected PLU/UPC reports
- ❑ PLU cost values

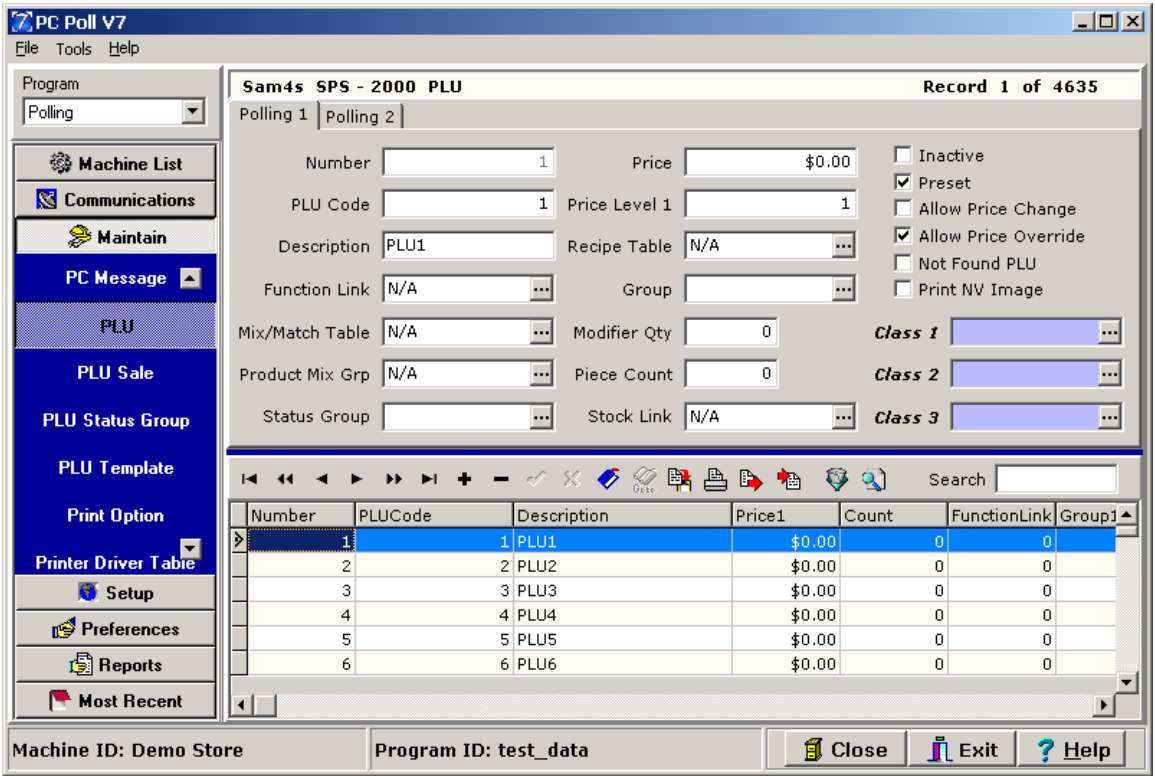
The setup on Report Module is quick and easy – users are only 15 minutes away from viewing general profitability.

To begin, be sure all programs have been saved back to the software and at least one PLU/UPC report has been collected.

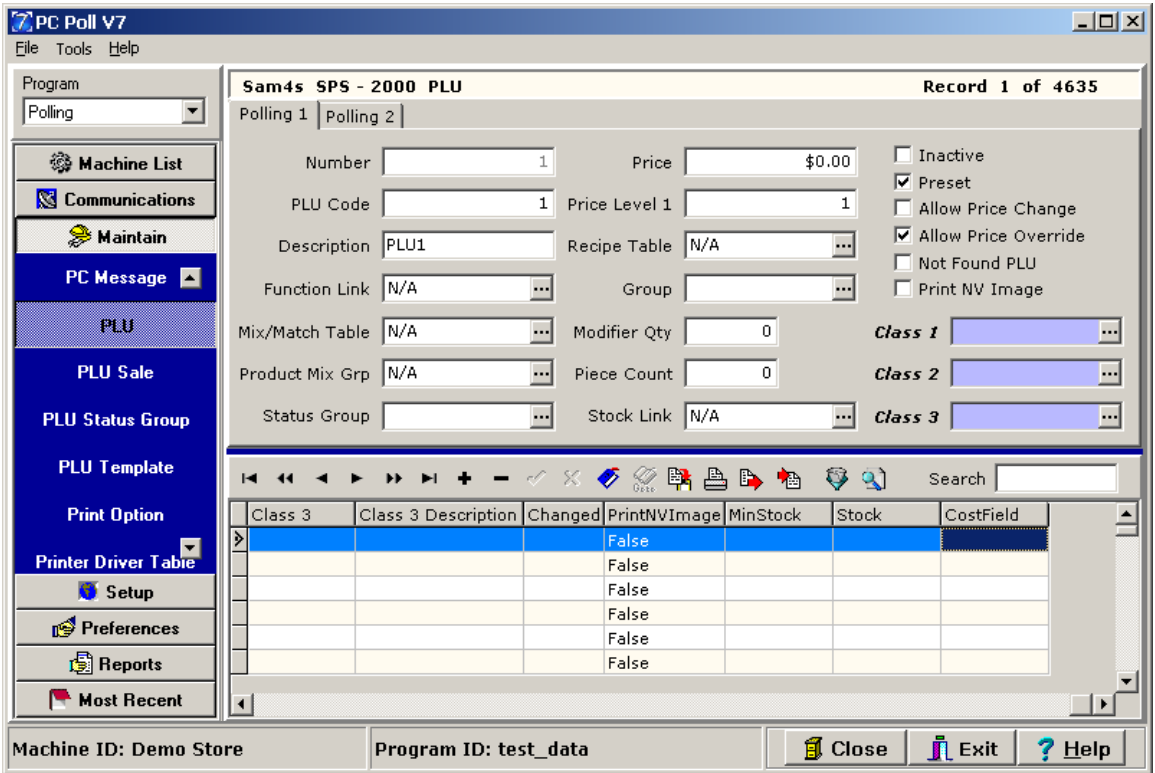
The PLU Margin report also requires users to enter a cost value per PLU/UPC item. The PC/POLL Staff has added a few new tools to the PLU/UPC maintenance area to help users quickly populate estimated cost values. Note: The PLU Margin report calculates profit based off a static cost to give users an estimated profit value.

Below are the steps to setup the cost value on each PLU/UPC item.

1. Open V7 Polling
2. Select Polling from the drop-down program selector
3. Click on the Machine List button
4. Select the desired machine by single-clicking on the machine name
5. Select the Maintain button
6. Scroll down until the PLU maintenance area is visible
7. Single-click to enter the maintenance area ~ see sample screen below



8. Within the lower grid area, scroll over to the right to view the last column – CostField ~ see image below



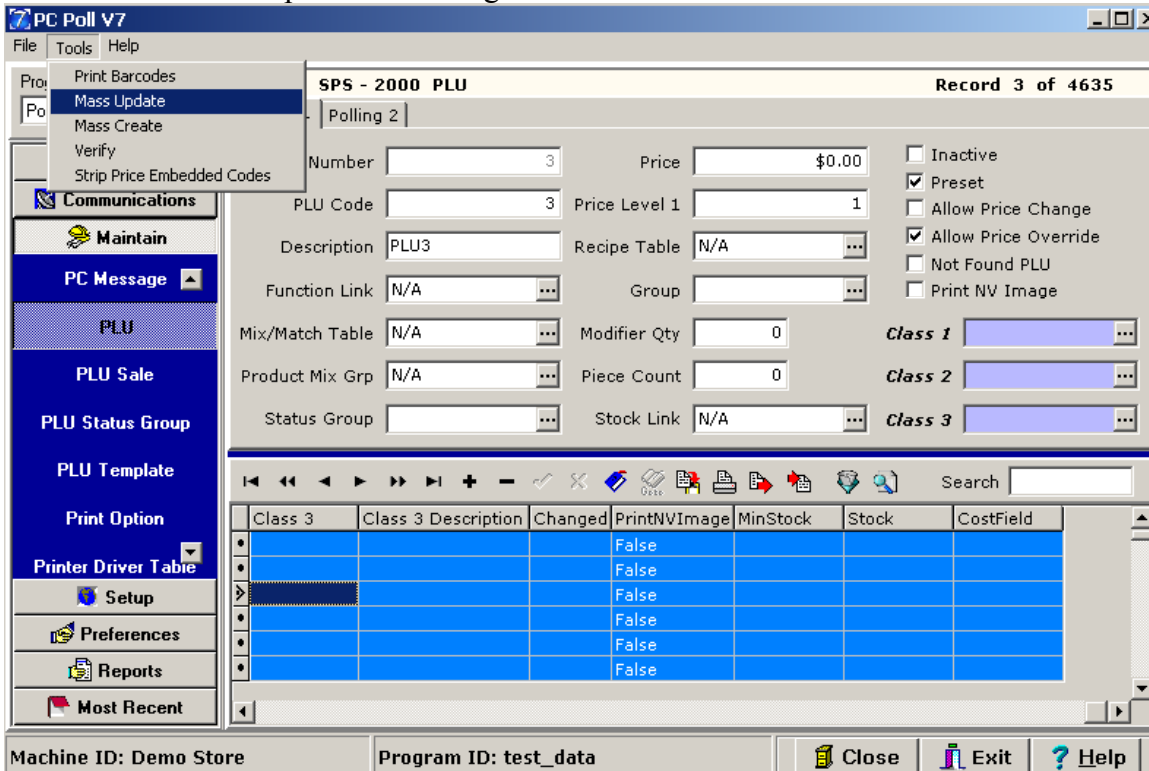
Cost values can be entered manually one at a time either via the grid area or the upper detail section of the software. The instructions below detail the use of the Mass Update feature to expedite the process.

9. Hold down the Ctrl key on the keyboard and then press the letter A key to select all items. All items will turn light blue to show they are selected (Note: Mass Update can be performed on a various

number of items – as little as two items. Use of the Ctrl and Shift keys allows users to customize their selection, while Ctrl A selects all items.)

10. Then go to the upper left menu and select Tools

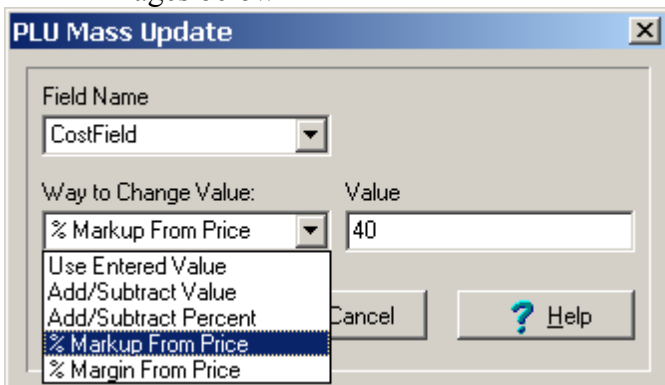
11. Select Mass Update ~ see image below



12. From within the Field Name column scroll down and select CostField

13. Select the preferred Way to Change Value and enter a value

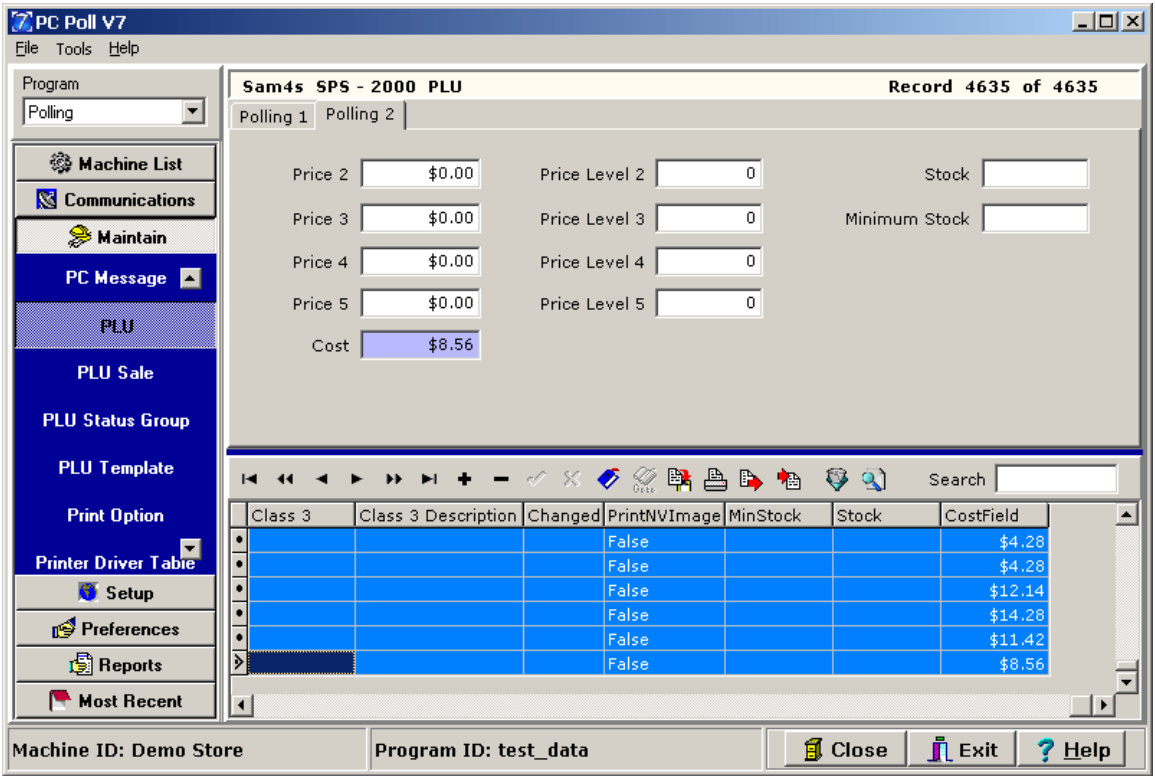
14. Click the OK button to update all selected items. The software will quickly process the item list ~ see images below




In the example above the CostField will be calculated based off the item's entered price. The software will calculate the value using a 40% markup off the price. Users may also elect to use an entered value for all selected items, add or subtract a value from the currently entered value, add or subtract a percent from the currently entered value or use the mathematical calculation for margin. Below are the formulas for margin and markup. Note: The software will round to the nearest whole cent.

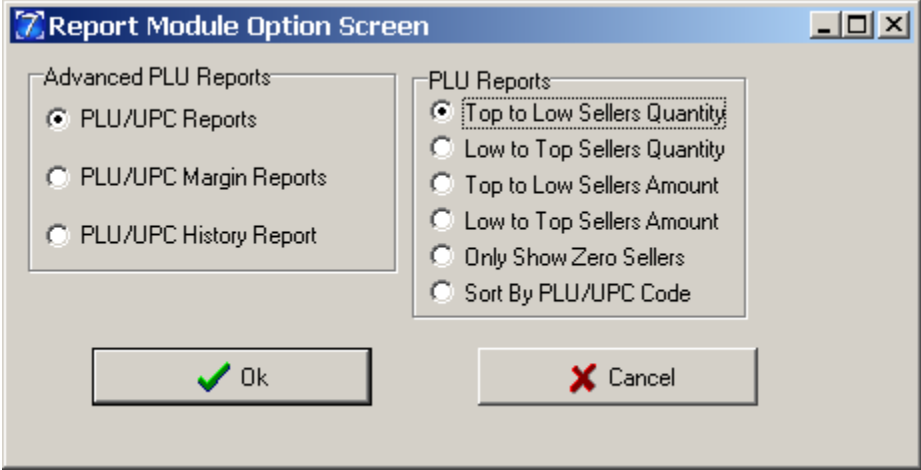
$$\text{Markup Selling Price} = \text{Cost} * (1 + (\text{Entered Percent} / 100))$$

$$\text{Margin Selling Price} = \text{Cost} / (1 - (\text{Entered Percent} / 100))$$



Report Module Steps

Access to the Report Module is found with the Reports area of the software. To access this feature, simply click on a PLU/UPC report and the  icon will appear active. Clicking on the icon will give users the following options.



Report Module Option Screen

Advanced PLU Reports

- PLU/UPC Reports
- PLU/UPC Margin Reports
- PLU/UPC History Report

PLU Margin Reports

- Sort By PLU/UPC Code
- Top Seller by Profit
- Low Seller by Profit

Report Module Option Screen

Advanced PLU Reports

- PLU/UPC Reports
- PLU/UPC Margin Reports
- PLU/UPC History Report

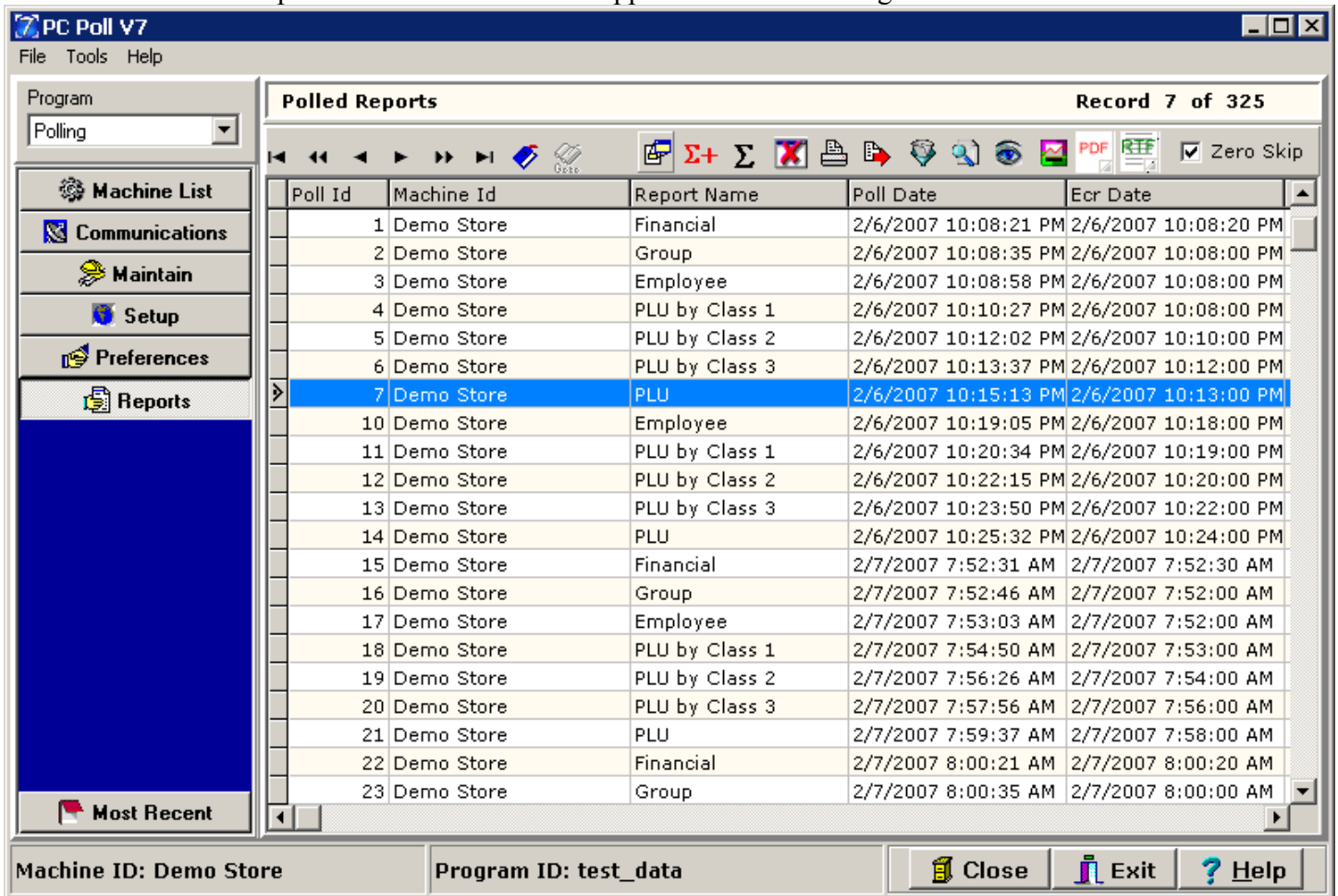
PLU History Report

PLU Code ...

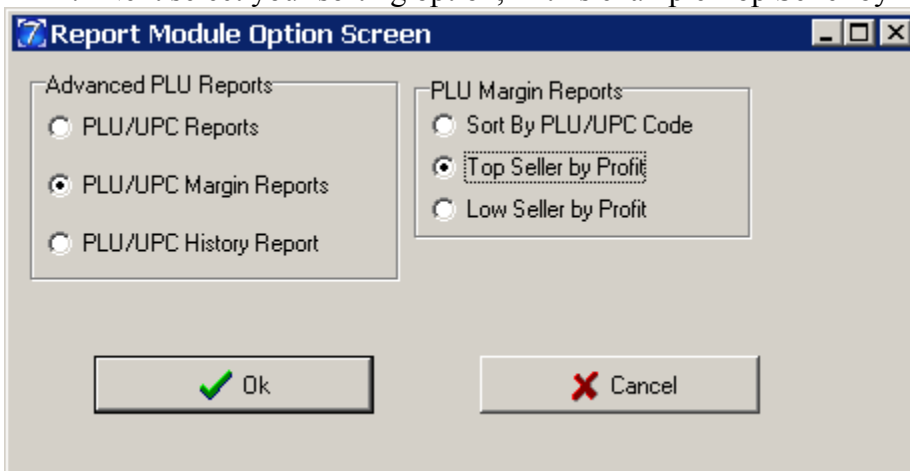
- Ascending Dates Descending Dates
- Use Levels Graph Report

Below are the steps to generate a PLU/UPC margin report. Steps to generate the PLU Top and Low usage and PLU History reports are similar.

- A. Enter the Reports area of the program, by clicking on Reports from the left-side menu bar
- B. Single-click on a PLU/UPC or Scan PLU report
- C. Click on the Report Module icon from the upper toolbar ~ see image below



- D. The Report Module Option Screen will appear. In this example, select PLU/UPC Margin Report
- E. Next select your sorting option, in this example Top Seller by Profit was selected ~ see image



- F. Click the OK button
- G. The Consolidate Options screen will be displayed. Select the desired time range, Poll Type, Poll Area, Stores, Machine and Satellites. To only include reports that contain the selected number of satellite registers select the Exclusive option. To include reports that contain data from any number of or all of the satellite registers, select Inclusive. The report also has 3 export options: Export to File, Print to PDF and Print To Report Text File (Note: This example only contains data for one machine. If the system contained multiple, the additional machines and stores would be displayed in black and users could choose to include or exclude particular stores or machines.)

Report **PLU** Start Date **1/ 1/2007** Poll Type **ALL**

Machine **Sam4s SPS - 2000 2.01r** End Date **4/30/2007** Poll Area **ALL**

Store List

- Liquor Store

Machine List

- Demo Store

Export To File
 Print To PDF
 Print To Report Text File

Select All Clear All Select All Clear All

Satellite List

<input checked="" type="checkbox"/> Reg 1/Master	<input type="checkbox"/> Reg 8/Satellite	<input type="checkbox"/> Reg 15/Satellite	<input type="checkbox"/> Reg 22/Satellite	<input type="checkbox"/> Reg 29/Satellite
<input checked="" type="checkbox"/> Reg 2/Bk Master	<input type="checkbox"/> Reg 9/Satellite	<input type="checkbox"/> Reg 16/Satellite	<input type="checkbox"/> Reg 23/Satellite	<input type="checkbox"/> Reg 30/Satellite
<input checked="" type="checkbox"/> Reg 3/Satellite	<input type="checkbox"/> Reg 10/Satellite	<input type="checkbox"/> Reg 17/Satellite	<input type="checkbox"/> Reg 24/Satellite	<input type="checkbox"/> Reg 31/Satellite
<input checked="" type="checkbox"/> Reg 4/Satellite	<input type="checkbox"/> Reg 11/Satellite	<input type="checkbox"/> Reg 18/Satellite	<input type="checkbox"/> Reg 25/Satellite	<input type="checkbox"/> Reg 32/Satellite
<input type="checkbox"/> Reg 5/Satellite	<input type="checkbox"/> Reg 12/Satellite	<input type="checkbox"/> Reg 19/Satellite	<input type="checkbox"/> Reg 26/Satellite	<input type="checkbox"/> Reg 33/Satellite
<input type="checkbox"/> Reg 6/Satellite	<input type="checkbox"/> Reg 13/Satellite	<input type="checkbox"/> Reg 20/Satellite	<input type="checkbox"/> Reg 27/Satellite	<input type="checkbox"/> Reg 34/Satellite
<input type="checkbox"/> Reg 7/Satellite	<input type="checkbox"/> Reg 14/Satellite	<input type="checkbox"/> Reg 21/Satellite	<input type="checkbox"/> Reg 28/Satellite	

Inclusive Exclusive

Select All Clear All

OK Cancel Help

- H. Click Ok to begin the tabulation process
- I. The software will display progress bars while the data is being collected
- J. Then the report will be displayed

Print Preview 93% 1 Close

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Advanced Consolidation

PLU Margin

From Date 01/01/2007 To Date 04/30/2007 Poll Type ALL Area ALL

Store List Liquor Store

Machine List Demo Store

Register List Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite

Type Inclusive

PLU/UPC/EAN	Description	Sell Price Level 1	Quantity	Amount	Cost	Profit	Profit %
10	OPEN BEER	\$0.00	110	\$2,041.36	\$0.00	\$2,041.36	%100.00
30	OPEN WINE	\$0.00	161	\$1,573.22	\$0.00	\$1,573.22	%100.00
1820096867	MICH GLD LT 24PK NR	\$17.99	274	\$4,927.46	\$12.85	\$1,406.56	%28.55
20	OPEN LIQUOR	\$0.00	102	\$996.29	\$0.00	\$996.29	%100.00
3410057306	MILLER LITE 24PK	\$17.99	193	\$3,468.47	\$12.85	\$988.42	%28.50
1820096379	MICH GLD LT 24NR	\$19.99	131	\$2,618.69	\$14.28	\$748.01	%28.56
8068650012	WINDSOR 1.75	\$16.99	107	\$1,800.94	\$12.14	\$501.96	%27.87
8700020115	CAPTAIN MORGAN 1.75L	\$23.99	63	\$1,501.77	\$17.14	\$421.95	%28.10
1820000697	MICH GLD LT 12PK NR	\$10.99	134	\$1,472.66	\$7.85	\$420.76	%28.57
8048001520	BACARDI 1.75L	\$21.99	66	\$1,449.14	\$15.71	\$412.28	%28.45
8048001530	BACARDI LT	\$14.99	93	\$1,394.07	\$10.71	\$398.04	%28.55
1820053168	BUD LT 24PK CN	\$17.99	77	\$1,385.23	\$12.85	\$395.78	%28.57
872700	CAPTAIN MORGAN LT	\$14.99	92	\$1,379.08	\$10.71	\$393.76	%28.55
1820000693	MICH GLD LT 12PK CN	\$9.99	118	\$1,177.82	\$7.14	\$335.30	%28.47
8711601809	PHILLIPS VODKA 175L	\$13.99	78	\$1,089.82	\$9.99	\$310.60	%28.50
3410017306	MGD 24PK	\$17.99	59	\$1,061.41	\$12.85	\$303.26	%28.57
3410007306	MIL BEST LIGHT 24PK	\$11.99	88	\$1,055.12	\$8.56	\$301.84	%28.61
1820011168	BUD 24PK CN	\$17.99	57	\$1,025.43	\$12.85	\$292.98	%28.57
8200072760	SMRINOFF VODKA 1.75L	\$19.99	51	\$1,017.49	\$14.28	\$289.21	%28.42
1820086167	BUSCH LIGHT 24PK	\$13.99	69	\$965.31	\$9.99	\$276.00	%28.59
50	MISC TAX	\$0.00	60	\$273.65	\$0.00	\$273.65	%100.00
8066095615	CORONA 12NR	\$12.99	62	\$844.08	\$9.28	\$268.72	%31.84
1820092867	MICH GLDN 24PK CN	\$15.99	53	\$873.47	\$11.42	\$268.21	%30.71
7199031600	COORS LT 24PK CN	\$17.99	51	\$915.49	\$12.85	\$260.14	%28.42
854150	E & J BRANDY 175L	\$17.99	48	\$857.32	\$12.85	\$240.52	%28.05
1820096418	MICH GLD LT 18PK CN	\$13.99	58	\$811.42	\$9.99	\$232.00	%28.59
8427918422	KARKOV VODKA 175L	\$12.99	61	\$788.49	\$9.28	\$222.41	%28.21

06/20/2007 5:53:57 PM PLU Margin Page 1 of 79

Below are a few other sample reports generated by Report Module. On the PLU History report users will need to enter or use the to select their item from a list. The PLU History report also gives users the option to see an item by levels and to graph the report. The other two reports do not support PLU/UPC levels. The values are consolidated across all levels.

Sample PLU Top Sellers by Quantity

Print Preview

100%

Close

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Advanced Consolidation *PLU*

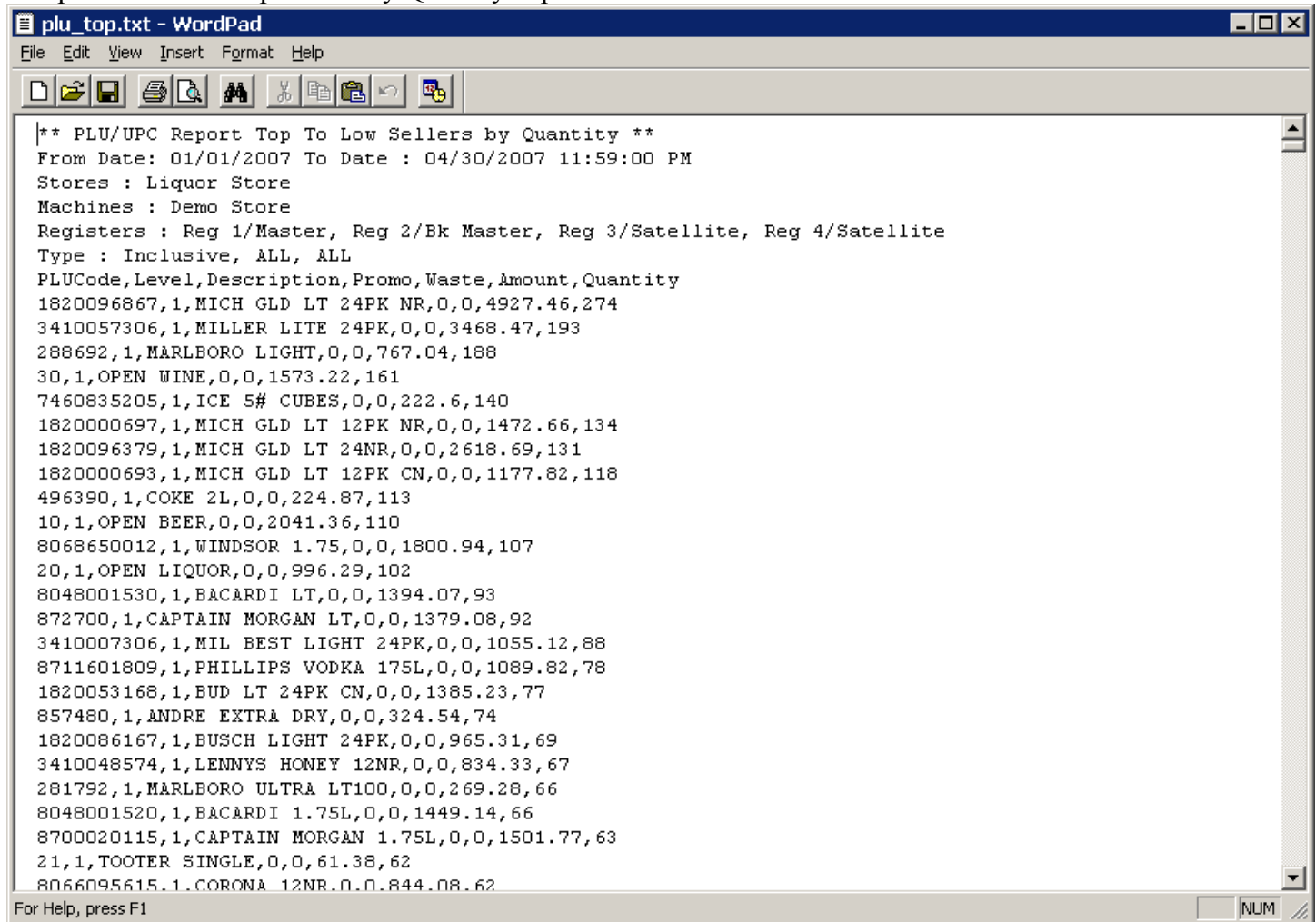
From Date 01/01/2007 **To Date** 04/30/2007 **Poll Type** ALL **Area** ALL

Store List Liquor Store
Machine List Demo Store
Register List Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite
Type Inclusive

PLU/PC/EAN	Description	Quantity	Amount	Promo	Waste
1820096867	MICH GLD LT 24PK NR	274	\$4,927.46	0	0
3410057306	MILLER LITE 24PK	193	\$3,468.47	0	0
288692	MARLBORO LIGHT	188	\$767.04	0	0
30	OPEN WINE	161	\$1,573.22	0	0
7460835205	ICE 5# CUBES	140	\$222.60	0	0
1820000697	MICH GLD LT 12PK NR	134	\$1,472.66	0	0
1820096379	MICH GLD LT 24NR	131	\$2,618.69	0	0
1820000693	MICH GLD LT 12PK CN	118	\$1,177.82	0	0
496390	COKE 2L	113	\$224.87	0	0
10	OPEN BEER	110	\$2,041.36	0	0
8068650012	WINDSOR 1.75	107	\$1,800.94	0	0
20	OPEN LIQUOR	102	\$996.29	0	0
8048001530	BACARDI LT	93	\$1,394.07	0	0
872700	CAPTAIN MORGAN LT	92	\$1,379.08	0	0
3410007306	MIL BEST LIGHT 24PK	88	\$1,055.12	0	0
8711601809	PHILLIPS VODKA 175L	78	\$1,089.82	0	0
1820053168	BUD LT 24PK CN	77	\$1,385.23	0	0
857480	ANDRE EXTRA DRY	74	\$324.54	0	0
1820086167	BUSCH LIGHT 24PK	69	\$965.31	0	0
3410048574	LENNYS HONEY 12NR	67	\$834.33	0	0
281792	MARLBORO ULTRA LT100	66	\$269.28	0	0
8048001520	BACARDI 1.75L	66	\$1,449.14	0	0
8700020115	CAPTAIN MORGAN 1.75L	63	\$1,501.77	0	0
21	TOOTER SINGLE	62	\$61.38	0	0
8066095615	CORONA 12NR	62	\$844.08	0	0
8427918422	KARKOV VODKA 175L	61	\$788.49	0	0
60	MISC TAZ	60	\$222.60	0	0

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Sample PLU/UPC Top Sellers by Quantity export to text file



The image shows a screenshot of a Windows WordPad application window titled "plu_top.txt - WordPad". The window contains a text file with the following content:

```
** PLU/UPC Report Top To Low Sellers by Quantity **  
From Date: 01/01/2007 To Date : 04/30/2007 11:59:00 PM  
Stores : Liquor Store  
Machines : Demo Store  
Registers : Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite  
Type : Inclusive, ALL, ALL  
PLUCode,Level,Description,Promo,Waste,Amount,Quantity  
1820096867,1,MICH GLD LT 24PK NR,0,0,4927.46,274  
3410057306,1,MILLER LITE 24PK,0,0,3468.47,193  
288692,1,MARLBORO LIGHT,0,0,767.04,188  
30,1,OPEN WINE,0,0,1573.22,161  
7460835205,1,ICE 5# CUBES,0,0,222.6,140  
1820000697,1,MICH GLD LT 12PK NR,0,0,1472.66,134  
1820096379,1,MICH GLD LT 24NR,0,0,2618.69,131  
1820000693,1,MICH GLD LT 12PK CN,0,0,1177.82,118  
496390,1,COKE 2L,0,0,224.87,113  
10,1,OPEN BEER,0,0,2041.36,110  
8068650012,1,WINDSOR 1.75,0,0,1800.94,107  
20,1,OPEN LIQUOR,0,0,996.29,102  
8048001530,1,BACARDI LT,0,0,1394.07,93  
872700,1,CAPTAIN MORGAN LT,0,0,1379.08,92  
3410007306,1,MIL BEST LIGHT 24PK,0,0,1055.12,88  
8711601809,1,PHILLIPS VODKA 175L,0,0,1089.82,78  
1820053168,1,BUD LT 24PK CN,0,0,1385.23,77  
857480,1,ANDRE EXTRA DRY,0,0,324.54,74  
1820086167,1,BUSCH LIGHT 24PK,0,0,965.31,69  
3410048574,1,LENNYS HONEY 12NR,0,0,834.33,67  
281792,1,MARLBORO ULTRA LT100,0,0,269.28,66  
8048001520,1,BACARDI 1.75L,0,0,1449.14,66  
8700020115,1,CAPTAIN MORGAN 1.75L,0,0,1501.77,63  
21,1,TOOTER SINGLE,0,0,61.38,62  
8066095615,1,CORONA 12NR,0,0,844.08,62
```

At the bottom left of the window, it says "For Help, press F1". At the bottom right, there is a "NUM" button and a cursor icon.

Sample PLU/UPC Margin PDF export

Advanced Consolidation
PLU Margin
 From Date 01/01/2007 To Date 04/30/2007 Poll Type ALL Area ALL
 Store List Liquor Store
 Machine List Demo Store
 Register List Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite
 Type Inclusive

PLU/UPC/EAN	Description	Sell Price Level 1	Quantity	Amount	Cost	Profit	Profit %
10	OPEN BEER	\$0.00	110	\$2,041.36	\$0.00	\$2,041.36	%100.00
30	OPEN WINE	\$0.00	161	\$1,573.22	\$0.00	\$1,573.22	%100.00
1820096867	MICH GLD LT 24PK NR	\$17.99	274	\$4,927.46	\$12.85	\$1,406.56	%28.55
20	OPEN LIQUOR	\$0.00	102	\$996.29	\$0.00	\$996.29	%100.00
3410057306	MILLER LITE 24PK	\$17.99	193	\$3,468.47	\$12.85	\$988.42	%28.50
1820096379	MICH GLD LT 24NR	\$19.99	131	\$2,618.69	\$14.28	\$748.01	%28.56
8068650012	WINDSOR 1.75	\$16.99	107	\$1,800.94	\$12.14	\$501.96	%27.87
8700020115	CAPTAIN MORGAN 1.75L	\$23.99	63	\$1,501.77	\$17.14	\$421.95	%28.10
1820000697	MICH GLD LT 12PK NR	\$10.99	134	\$1,472.66	\$7.85	\$420.76	%28.57
8048001520	BACARDI 1.75L	\$21.99	66	\$1,449.14	\$15.71	\$412.28	%28.45
8048001530	BACARDI LT	\$14.99	93	\$1,394.07	\$10.71	\$398.04	%28.55
1820053168	BUD LT 24PK CN	\$17.99	77	\$1,385.23	\$12.85	\$395.78	%28.57
872700	CAPTAIN MORGAN LT	\$14.99	92	\$1,379.08	\$10.71	\$393.76	%28.55
1820000693	MICH GLD LT 12PK CN	\$9.99	118	\$1,177.82	\$7.14	\$335.30	%28.47
8711601809	PHILLIPS VODKA 175L	\$13.99	78	\$1,089.82	\$9.99	\$310.60	%28.50
3410017306	MGD 24PK	\$17.99	59	\$1,061.41	\$12.85	\$303.26	%28.57
3410007306	MIL BEST LIGHT 24PK	\$11.99	88	\$1,055.12	\$8.56	\$301.84	%28.61
1820011168	BUD 24PK CN	\$17.99	57	\$1,025.43	\$12.85	\$292.98	%28.57
8200072760	SMRINOFF VODKA 1.75L	\$19.99	51	\$1,017.49	\$14.28	\$289.21	%28.42

Sample PLU/UPC Margin print Report Text File

PLU Margin
 Advanced Consolidation
 From Day01/01/2007 To Day04/30/2007 Poll TypeALL AreaALL
 Store Liquor Store
 Machine Demo Store
 Register List
 Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite
 TypeInclusive

PLU/UPC/EAN	Description	Sell Price Level	Quantity	Amount	Cost	Profit	Profit %
10	OPEN BEER	\$0.00	110	\$2,041.36	\$0.00	\$2,041.36	%100.00
30	OPEN WINE	\$0.00	161	\$1,573.22	\$0.00	\$1,573.22	%100.00
1820096867	LD LT 24PK NR	\$17.99	274	\$4,927.46	\$12.85	\$1,406.56	%28.55
20	OPEN LIQUOR	\$0.00	102	\$996.29	\$0.00	\$996.29	%100.00
3410057306	LITE 24PK	\$17.99	193	\$3,468.47	\$12.85	\$988.42	%28.50
1820096379	LD LT 24NR	\$19.99	131	\$2,618.69	\$14.28	\$748.01	%28.56
8068650012	R 1.75	\$16.99	107	\$1,800.94	\$12.14	\$501.96	%27.87
8700020115	MORGAN 1.75L	\$23.99	63	\$1,501.77	\$17.14	\$421.95	%28.10

Sample PLU/UPC History

Print Preview 100% 1 Close

Main
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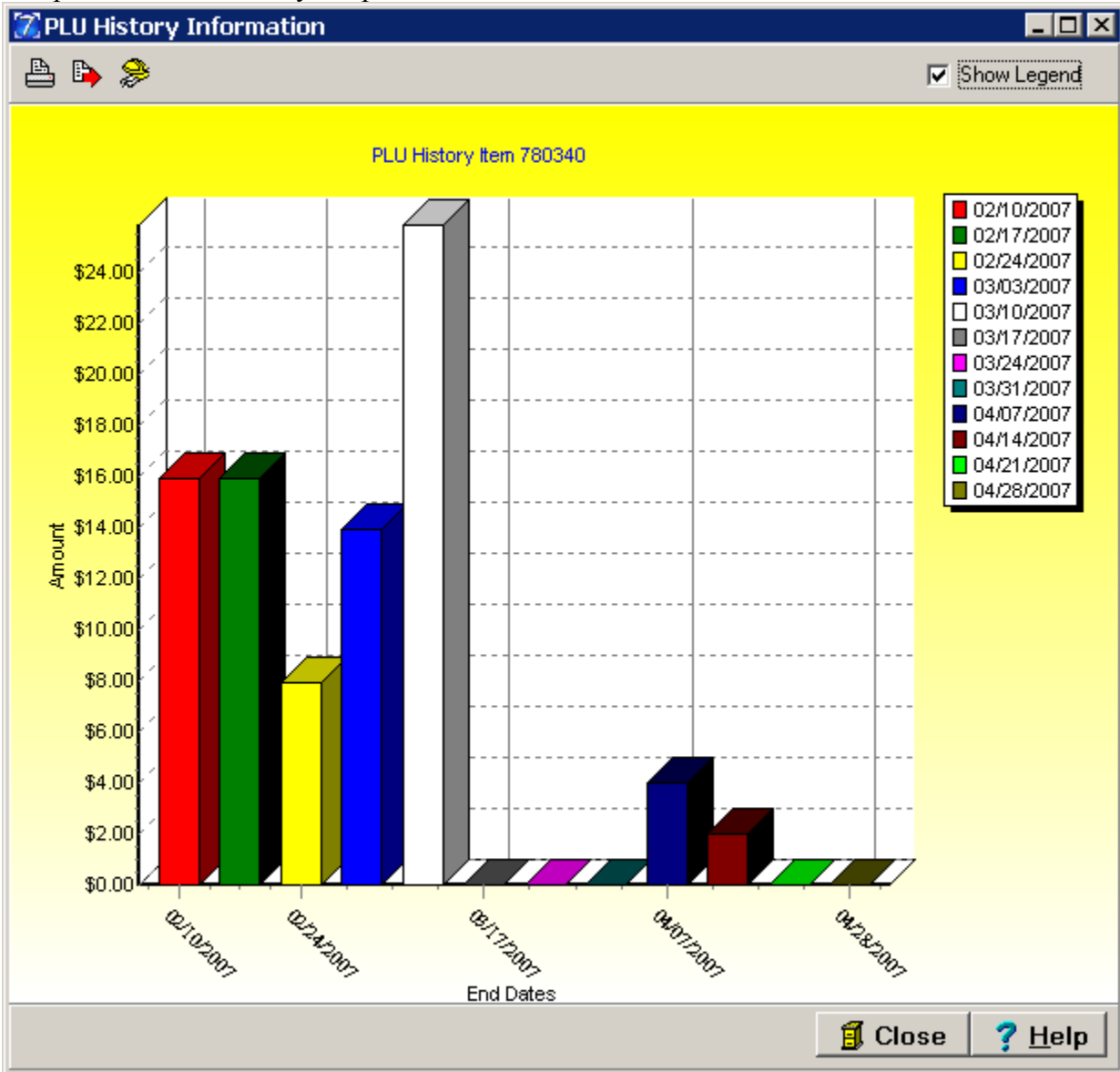
Advanced Consolidation *PLU History Report*
PLU/UPC : 780340 7 UP 2L

Poll Type ALL **Area** ALL
Store List Liquor Store
Machine List Demo Store
Register List Reg 1/Master, Reg 2/Bk Master, Reg 3/Satellite, Reg 4/Satellite
Type Inclusive

<u>From Date</u>	<u>To Date</u>	<u>Quantity</u>	<u>Amount</u>
02/04/2007	02/10/2007	8	\$15.92
02/11/2007	02/17/2007	8	\$15.92
02/18/2007	02/24/2007	4	\$7.96
02/25/2007	03/03/2007	7	\$13.93
03/04/2007	03/10/2007	13	\$25.87
03/11/2007	03/17/2007	0	\$0.00
03/18/2007	03/24/2007	0	\$0.00
03/25/2007	03/31/2007	0	\$0.00
04/01/2007	04/07/2007	2	\$3.98
04/08/2007	04/14/2007	1	\$1.99
04/15/2007	04/21/2007	0	\$0.00
04/22/2007	04/28/2007	0	\$0.00
Total		43	\$85.57

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Sample PLU/UPC History Graph ~ customized



Sample PLU/UPC History Excel export

Microsoft Excel - history.csv

File Edit View Insert Format Tools Data Window Help Acrobat

A1 = ** PLU/UPC History Report **

	A	B	C	D	E	F	G
1	** PLU/UPC History Report **						
2	Stores : Liquor Store						
3	Machines : Demo Store						
4	Registers : Reg 1/Master	Reg 2/Bk Master	Reg 3/Satellite	Reg 4/Satellite			
5	Type : Inclusive	ALL	ALL				
6	PLU/UPC: 780340 7 UP 2L						
7	Number	Level	FromDate	ToDate	Amount	Quantity	
8	0	1	2/4/2007	2/10/2007	15.92	8	
9	1	1	2/11/2007	2/17/2007	15.92	8	
10	2	1	2/18/2007	2/24/2007	7.96	4	
11	3	1	2/25/2007	3/3/2007	13.93	7	
12	4	1	3/4/2007	3/10/2007	25.87	13	
13	5	1	3/11/2007	3/17/2007	0	0	
14	6	1	3/18/2007	3/24/2007	0	0	
15	7	1	3/25/2007	3/31/2007	0	0	
16	8	1	4/1/2007	4/7/2007	3.98	2	
17	9	1	4/8/2007	4/14/2007	1.99	1	
18	10	1	4/15/2007	4/21/2007	0	0	
19	11	1	4/22/2007	4/28/2007	0	0	
20							
21							

history

Ready NUM