

NCR Connected Services User Guide

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Introduction

Welcome to the NCR family of open-system software for integrating and managing retail operations.

This guide describes how to use Cashier Analyzer, a web-based application that assists stores in preventing loss, theft and detecting fraud by analyzing recent cashier transaction records in your stores for up to thirteen rolling weeks. Cashier Analyzer's functionality lies in its ability to select and mix different criteria to enable you to create, shape and later re-shape your view of the generated data, and then drill down to further details.

The application allows you to select *Criteria* – such as store, department, and location to display and filter the required cashiers' data for a selected time period. Cashier Analyzer uses several *Key Performance Indicators (KPIs)* to analyze these records and display the top ten suspect cashiers and/or tickets in a colorful and easy to understand format.

Cashier Analyzer enables you to determine:

- Which cashiers were the most problematic
- Which tickets were the most problematic and which cashiers were responsible for those tickets
- What was the performance of the cashier over time
- What was the performance of each cashier in comparison to other cashiers in the same store

Cashier Analyzer's KPIs gauge performance issues such as void tickets, cancellations, refunds, tickets per no sale, and many more.

Before starting on how to use the tool, we will review how to install and access the tool in the next section.

Installation

System requirements:

- Qlikview Plug-in (provided by NCR)
- Compatible Operating Systems
 - Windows XP, Win 7, Win 8, Win 10
- Compatible Browsers
 - Internet Explorer 9
 - Google Chrome (with IE Plug-In)

Cashier Analyzer Installation Instructions

This Technical Bulletin will walk you through the installation process necessary to access Cashier Analyzer: [Click Here for Dec15CAS.pdf \(POS-TECH-15.16\)](#).

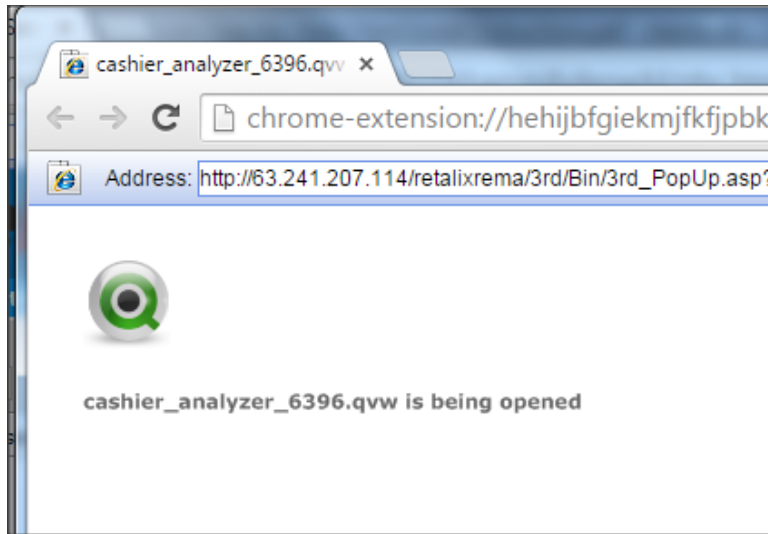
Launch Application

This section describes how to launch the Cashier Analyzer application. The steps below are specific to launching within Chrome browser utilizing the IE tab plug-in, but the process is the same for the IE browser.

1. Open the Chrome Browser, and click on the IE Tab icon.
 - a. Note the IE Tab icon looks different depending on your software version



- b. This will launch a new address bar below the standard address bar.
2. In the IE address bar within the Chrome browser, enter in www.storenext.com
 - a. This will load the landing page for Connected Services application login
 - b. Enter your login information
 - c. Application is loaded
3. Click on the Cashier Analyzer link in the left hand frame of the landing page
 - a. A window will pop-up indicating the Cashier Analyzer application is loading. *Note: This window may appear in the background of your windows, may have to Alt-Tab thru your open windows to find it.*



4. Another pop-up should appear prompting “Please Enter Your User ID”
 - a. Enter your Cashier Analyzer user ID – note that it is different from the initial login for www.storenxt.com
5. Another pop-up should appear prompting “Please Enter Your Password”
 - a. Enter your Cashier Analyzer password
6. The Cashier Analyzer dashboard will load
 - a. Please be advised this can take a few minutes if there are more than 10 stores in your chain
 - b. It is helpful to click the “maximize” button in your Chrome browser to ensure the dashboard is displayed optimally in your browser window

Network Information

If you observe slow response time when moving about reports and screens in Cashier Analyzer, a network change may be required. Please contact your IT department or your network partner/support to have them update firewall settings.

Firewall setting changes to make for a better experience are:

1. Allow TCP on port 4747 to destination IP 63.241.207.99

How Cashier Analyzer Works

Cashier Analyzer is simple, quick and easy to use. The following steps briefly describe the standard workflow:

- Select any Criteria and Time period for analytical display
 - For example, select all cashiers in a specific store for a two week period
- Compare each cashier to the store average per KPI
- View the analytical breakdown for all KPIs in a large, color coded chart where you can locate each KPI's data at a glance
- Instantly generate an advanced detailed graph of any KPI breakdown
- Create a color coded chart showing historical trends
- View an image of the original ticket (*or a replicated copy, depending on POS*)

Cashier Analyzer's functionality lies in its ability to select and mix different criteria to enable you to create, shape and later re-shape your view of the generated data, and then drill down to further details.

Security

Cashier Analyzer can only be accessed by authorized users. The tool provides the ability to restrict any user by displaying data relevant only to that user. This is controlled thru the user setup on the www.storenex.com website. A user can be restricted to which stores they can view in StoreNext, and will be restricted to those same stores in Cashier Analyzer.

Understanding the Main Dashboard



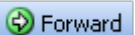


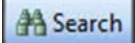
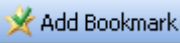

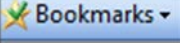
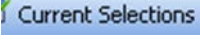
After a successful login, the Cashier Analyzer main “dashboard” will be displayed. The default view displays data for the current week for all the stores under your supervision. The dashboard is divided into five sections:

1. Menu
2. The Tab folder area
3. Time Selection
4. Criteria
5. Data Tables

The screenshot shows the Cashier Analyzer main dashboard. The interface includes a navigation menu on the left, a top navigation bar with tabs like 'Dashboard', 'Trend Reports', and 'Detailed Reports', and a main data area. The main data area contains two tables: 'Higher Risk Cashiers - Top 10 - Image' and 'Higher Risk Tickets - Top 10 - Image'. The 'Higher Risk Cashiers' table has columns for Store, Cashier, Ranking, Sales Per Ticket, Tickets Per No Sale, Void Tickets, Cancels, Open Ring, Refunds, Coupons, and Discounts. The 'Higher Risk Tickets' table has columns for EJ, Store, Cashier, POS, Ticket, Date & Time, Ranking, Void, Cancels, Refunds, Discounts, and Coupons. Red arrows on the left side of the screenshot point to the five sections mentioned in the text: 1-Menu, 2-Tab Folders, 3-Time Selection, 4-Criteria, and 5-Data Tables.

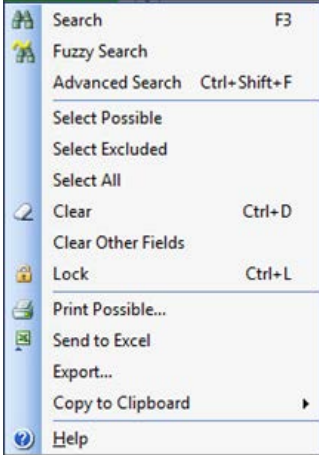
General Navigation Tools

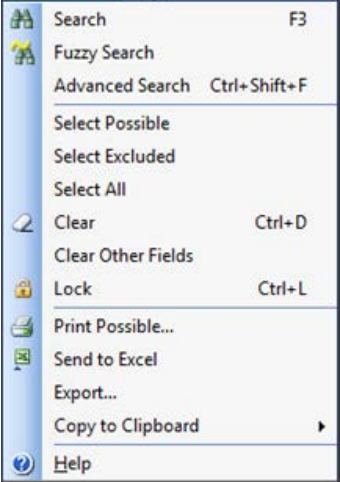
The Menu Toolbar

 Clear	Click the Clear button to clear all selections, and to return to the default settings
 Back	Click the Back arrow to return to the previous selection
 Forward	The Forward button takes you to the next screen, only if you have reversed back at least one screen in that workflow
 Lock  Unlock	This button will Lock or Unlock the tables to the current selection (<i>unlike Freeze, which will only freeze the high risk cashiers</i>)
 Search	To use, enter a criteria then click this button to search, such as by cashier number or by store number
 Add Bookmark	Add bookmark enables you to create a customized inquiry that can be reference repeatedly without having to create the same view again
 Print	The print button enables printing of the current page or screen
 Bookmarks ▾	View a drop-down list of all defined bookmarks
 Current Selections	Click to see the current selected criteria that you are viewing in Cashier Analyzer

The Right Mouse Click Shortcut Menu







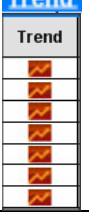


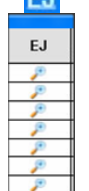
The shortcut menu provides additional function, and can be accessed by performing a right-mouse-click on the application interface. *Note: the shortcut menu will display only the options available based on the area of the screen your mouse is at.* The following list describes every option available.

	<u>Menu Option</u>	<u>Description</u>
	Search	Opens a search box enabling a search for a specific and defined criteria
	Fuzzy Search	Fuzzy “wildcard” search is similar to a standard free text search, with the exception that it compares and sorts all field values according to their degree of resemblance to the search string. When a wildcard search is made, a tilde (~) character is displayed in front and back of the search string. For example, a wildcard search for “ann” will return values such as anna, ann, and banned in the results, if those values exist in the data.
	Advanced Search	Allows search of specific tables
	Select Possible	Selects all values of the field
	Select Excluded	Inverts selection
	Select All	Selects all available
	Clear	Clears any criteria filters

	Clear Other Fields	Clears all fields
	Lock	Locks the selected criteria, will change to Unlock when in lock mode. Simply click on Unlock to revert
	Print	Opens the Print dialog box to enable printing the current page/screen. Note: the preferred method of printing from a Cashier Analyzer screen is to Export to Excel first, edit the formatting to your preference, then print from Excel. This provides the most optimal print results.
	Print Possible	Prints the current screen/section data
	Send to Excel	Exports the current screen data to an Excel spreadsheet. Note: this is the preferred method of printing from Cashier Analyzer and will provide the best results
	Export	Opens the "Save As" dialog box where a file name, path and file type can be specified. Note: the pop-up may open in the background instead of the foreground of the application, check by minimizing application window
	Copy to Clipboard	Opens a dialog box for copying text/table sections such as Full Table, Table Data Area, Cell Value, or Image (which is similar to taking a screenshot)

Other Features and Functions

More functionality available within the Cashier Analyzer screens.

<u>Button</u>	<u>Description</u>
	Click this button to clear the date related selected data
	Click this button to clear Criteria list boxes
	Click this button to perform a search for a value
	Click this button to freeze the displayed data in the High Risk Cashiers Top 10 data table. For example, when clicking this button and selecting a cashier there will be no change in this table.
	Click this button to view the real values within the data tables
	Click this button to print from the specified data table
	<p>Click this button to enable viewing of the “Trend” data for a specific ticket. This will add an icon to each ticket. To view the trend, click on the icon </p> <p>Note: When clicking this trend button the first column name is changed from EJ to Trend and the icon changes to </p>
	<p>Click this “EJ” button to enable viewing of the Electronic Journal tickets. To open and view an individual electronic journal ticket, click the magnifying glass icon located on the line of the ticket you want to view.</p>

Tab Folder Area

The tab folder area is located at the top of the main interface, just under the toolbar. The following table describes the various tabs and their functionality.



<u>Tab</u>	<u>Explanation</u>
Dashboard	The default tab in Cashier Analyzer. This is the first step in your workflow, where you select the data you want displayed for cashiers and/or stores
Trend Reports	View a graph of historical trends for up to three cashiers using various KPIs
Detailed Reports	View addition and more detailed KPI data
KPIs Weigh Settings	Determine the weight of each KPI in the ranking algorithm
KPIs Threshold Settings	Determine which data is relevant (or alternatively, not relevant) for your analysis
How To / Help	This tab provides some descriptions on how to perform certain tasks and helpful information about the application

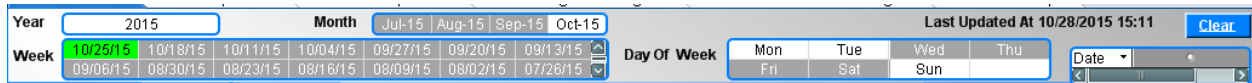
Criteria

Criteria are used to filter the KPIs in the Dashboard table in order to view the required data. The following section describes the five Criteria that are being utilized.

Note: The Time Hierarchy Criteria is installed with preconfigured limited hours for analysis, and the Cashier and POS Criteria are installed with preconfigured lists of members excluded by default from analysis. For more information, see [Adjusting the Criteria Settings](#) section of this document.

Time Criteria

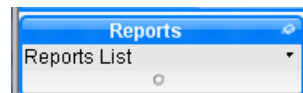
Time Hierarchy enables you to select a specific date or range of dates to focus on and evaluate performance for that period. By default, data for the current week is selected and shown in the Data Tables. The time Criteria only provides data for a 13 Rolling Weeks period in the past, based on today's date. Once the current week is complete, then the oldest week will drop off the week selection, so that there are always 13 full weeks plus current week in progress displayed.



<u>Date Criteria</u>	<u>Description</u>
Year	Displays the available years. This is relevant if today's date is at the beginning of a new year and you'd like to see data from the previous year.
Month	Displays the available months, and allows you to select a specific month within the data available in 13 rolling weeks.
Week	Displays the available weeks and allows you to select one or more weeks for your criteria that are available within the 13 rolling weeks.
Day of Week	Displays all days of the week and allows you to select one or more days for your criteria.
Date	Allows you to select specific dates from all available dates within the 13 rolling weeks from a drop-down list. Note: can select multiple days by pressing mouse button, holding, and dragging across the range of days you'd like in your selection.
Last Updated	Displays the last time the data within Cashier Analyzer was loaded.

Reports

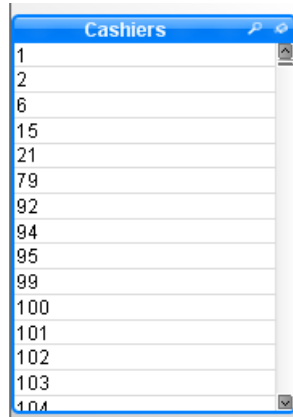
Reports List allows you to select a report. The default reports displayed in this Criteria box are the Detailed Reports, which are also accessible from the Detailed Reports folder tab. When the Trend Reports tab is selected, then the reports displayed are the Trend Reports.



Cashier List

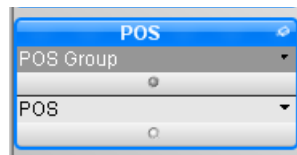
This listing of cashiers is the focus of all the criteria. From here, you are able to select one or more cashiers whose performance you want to analyze.

- Note the list box provides a magnifying glass for “search”. It can be quicker to search and key in the cashier number if your chain has a large amount of cashiers.



POS (Point of Sale)

This is a listing of identifying the number of each specific cash register or cashier station in the stores and allows you to select one or more POS terminals at one time.



1. POS Group – based on your business requirements you can set up a group of POS terminals to analyze (example: grocery terminals or bakery terminals or pharmacy terminals) This must be setup by the Connected Services application support team, submit an email with your request to SaaS_CS_Dallas_Support_Team@ncr.com
2. POS – allows you to select specific POS terminals from a drop-down list of all available terminals

Store

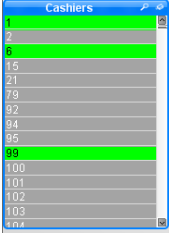
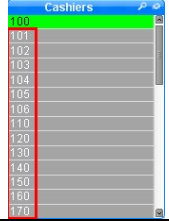

This is a listing of all stores available for you to view, based on your level of access.

- Note the list box provides a magnifying glass for “search”. It can be quicker to search and key in the store number if your chain has a large number of stores.



Criteria Text and Color Conventions

The Criteria lists are set up in a manner to easily understand what is selected and what is not, based on colors of text and background.

<u>Illustration</u>	<u>Description</u>
	<p>Text with a green background indicates that it is currently being displayed in the KPI area of the screen. In this illustration, data for cashiers 1, 6 and 99 are being displayed. Note that you can select multiple cashiers by holding and dragging the mouse thru the list; or by pressing the CTRL key on the keyboard and selecting each cashier, as was done in this illustration.</p>
	<p>Text with a grey background indicates that it is not currently selected to display in the data area.</p>
	<p>Text with a white background indicates that although it has not yet been selected, it is compatible with the data currently being shown in the Data Table area and is available for selection.</p>

Working with the Dashboard Screen

The Dashboard screen displays all the data for the selected criteria. This screen allows the user to drill down to more detailed reports in order to analyze high risk cashiers and tickets. The Dashboard screen displays different report data in the data tables based on the criteria that is selected.

There are two data tables displayed by default on the Dashboard screen. They are the Higher Risk Cashiers and the Higher Risk Tickets data tables. Each table has a variety of KPIs (Key Performance Indicators). These are the criteria by which a user is able to examine and evaluate cashiers and tickets. Any criteria can be selected and the data tables will display the results of the selections.

Data Tables

The Data Tables show the results of selecting and filtering Criteria for analysis. The display shows them sorted by the ranking process.

Ranking is performed by an algorithm that takes several KPIs and measures the performance of each cashier and compares it to the performance of the entire store. Ranking provides a strict value and if that value is better than the store average, then it gets a positive value; otherwise it gets a negative value. Depending on how the ranking differs from the store average, you get a higher number or a lower number. Depending on the ranking, Cashier Analyzer assigns each KPI a weighted value, and combines all the KPIs in order to create a single representative value. This value appears as the *ranking* KPI.

The weight given to each KPI is configured in the KPIs Weight Settings screen. See [Adjusting the Threshold Settings](#).

Higher Risk Cashiers

The table labelled “Higher Risk Cashiers – Top 10” details the most problematic cashiers and stores according to the ranking algorithm. Selecting specific criteria on the left side of the screen will filter the results in the data table. Below is an example of the table and explanation of the data elements.

Higher Risk Cashiers - Top 10 - Image										Freeze	Real Values		
Store	Cashier	Ranking	Sales Per Ticket	Tickets Per No Sale	Void Tickets	Cancel	Open Ring	Refunds	Coupons	Discounts			
11	134	-15.15											
11	123	-14.61											
11	112	-14.21											
66	294	-13.92											
11	145	-13.69											
5	100	-12.87											
12	150	-11.55											
66	130	-11.31											
12	100	-11.06											
12	103	-10.95											

KPI	Explanation
Freeze	<p>Click this button (always displayed regardless of other selected criteria) to freeze the information being displayed in the Higher Risk Cashiers – Top 10 data table. Note that when clicked, the button label will change to “UnFreeze”. To return to original data state, refresh the browser page to reload the data table.</p> <p>However, when selecting other KPIs in this mode and then clicking Unfreeze – the data tables will change according to your new selection.</p>
Real Values	<p>Click this button to display the Real Values for the KPIs that are displayed in the data table. To return to the icon view, refresh the browser page to reload the original data.</p> <p><i>Note:</i> “Real Values” are Cashier Analyzer’s Score for the KPI – not Dollar \$ or Percent % values</p>
Store	The actual business unit location where the cashier works
Cashier	One (1) individual cashier
Ranking	Each cashier’s performance is based on an algorithm that measures each KPI, assigns it a predefined weight, and then assigns it a negative or positive value
Sales Per Ticket	The average number of sales in dollars per ticket
Tickets Per No Sale	The number of times a cashier opened the Cash Drawer without a ticket associated with the opening
Void Tickets	When a purchase is rung up but no payment is registered. The data table can show in which stores these events occurred, and which cashiers were involved.
Cancel	Cancellation of any item(s) within a ticket that has already been scanned or rung up. The data table can show in which stores these events occurred, and which cashiers were involved.
Open Ring	When the POS prompts the cashier to manually enter a price for an item. This is generally due to two reasons – either it is an amount rung up to a specific department (with no UPC involved), or the scanned UPC does not have a price on file. The data table can show in which stores these events occurred, and which cashiers were involved.
Refunds	When the cashier refunds the price of an item (typically when an item is returned). This can be done irrespective of other items in a given ticket. The data table can show in which stores these events occurred, and which cashiers were involved.
Coupons	The document that can be exchanged for a financial discount or rebate when purchasing a product. The data table can show in which stores these events occurred, and which cashiers were involved.
Discounts	Reductions to a basic price. The data table can show in which stores these events occurred, and which cashiers were involved.

The Higher Risk Cashiers data table can be frozen. This is useful in comparing the displayed data to the Higher Risk Tickets data table, which has alternative criteria selected. When the freeze button is selected, the information is frozen and the background color of the data table turns blue. Once the Freeze button is selected then no further drill down is available in the data table. Example of how the data table looks when it is “frozen”:

Higher Risk Cashiers - Top 10 - Image (Detached)								Unfre...	Real Values		
Ranking	Store	Cashier	Sales Per Ticket	Tickets Per No Sale	Void Tickets	Cancel	Open Ring	Refunds	Coupons	Discounts	
-0.56	45077...	102	✗	✓	✓	✗	✓	✓	✓	✓	
-0.40	45077...	106	✓	✓	✗	✗	✗	✗	✗	✗	
-0.25	45077...	108	✗	✓	✓	✓	✗	✓	✓	✓	
0.09	45077...	204	✓	✓	✗	✓	✗	✗	✓	✓	
0.15	45077...	203	✗	✓	✓	✓	✓	✓	✗	✓	
0.32	45077...	107	✓	✓	✓	✓	✗	✓	✓	✓	
0.45	45077...	202	✓	✓	✓	✓	✓	✓	✗	✗	
0.47	45077...	200	✓	✓	✓	✗	✓	✓	✓	✓	

Higher Risk Tickets

This table shows the top ten higher risk tickets according to their ranking. Below is an example of the table and explanation of the data elements.


Higher Risk Tickets - Top 10 - Image												Trend
EJ	Store	Cashier	POS	Ticket	Date & Time	Ranking	Void	Cancel	Refunds	Discounts	Coupons	
	66	267	11	5638	2015-06-16 18:39:59	-3,333.33	✓	✓	✗	✓	✓	
	11	118	1	365	2015-06-15 13:10:11	-2,662.61	✓	✗	✓	✓	✓	
	11	145	9	7024	2015-06-15 11:35:25	-1,538.46	✓	✗	✗	✓	✓	
	11	123	9	7552	2015-06-17 15:17:15	-620.00	✓	✓	✗	✓	✓	
	16	656	8	939	2015-06-16 14:43:55	-600.00	✓	✗	✗	✓	✓	
	66	294	10	6167	2015-06-18 09:26:33	-455.60	✓	✗	✓	✓	✓	
	12	189	8	2960	2015-06-18 14:45:28	-416.67	✓	✓	✗	✓	✓	
	5	109	5	594	2015-06-16 13:09:11	-398.00	✓	✓	✗	✓	✓	
	6	665	6	5332	2015-06-16 16:45:51	-324.71	✓	✗	✓	✓	✓	
	11	114	9	7392	2015-06-16 19:17:05	-295.00	✓	✓	✗	✓	✓	

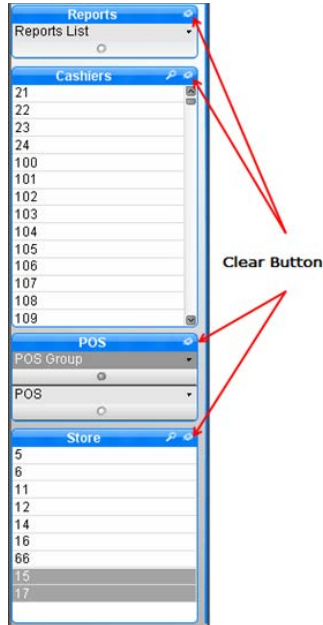
Column Headings	Explanation
Trend	By clicking this button, the EJ column in the grid changes the icon to a Trend icon and allows you to view the Trend data by clicking on the icon besides the data row you are seeking more details about. For further information on Trend – see Viewing Ticket Trends
EJ	Clicking on the magnifying glass in this column on a row will provide further information on the ticket. This will launch a copy of the receipt, where you can view line item details on the ticket.
Store	The store location for the ticket
Cashier	The cashier that generated the ticket
POS	The cash register lane or cashier station where the ticket occurred
Date & Time	The exact time stamp of the ticket
Ranking	The positive/negative ranking of the ticket based on Cashier Analyzer's ranking and scoring analysis
Void	Tickets that were created as a result of a void transaction
Cancel	Tickets that were created as a result of a line item cancellation
Refunds	Tickets that were created as a result of refunds
Discounts	Tickets that were created as a result of discounts
Coupons	Tickets that were created as a result of coupons

Working With Criteria

1. On the Cashier Analyzer Dashboard screen, select the required Criteria
 - a. To select a range of consecutive Criteria, select the first Criteria, then hold the left mouse button and drag over the additional Criteria to select. This will highlight the data to show it's been selected. Example:



- b. To clear the criteria and select new, click the Clear  button on the list box



- c. To select multiple Criteria that are not consecutive in the list, click the first Criteria, then press and hold the CTRL key on the keyboard, and select the next item(s). When finished selecting, release the CTRL key. All criteria will be highlighted and will move to the top of the display area.
2. Select additional required Criteria filters as needed in order to shape and re-shape your view of the data.


Note: If you click on a store or cashier in the Data Table, this will change your selection criteria and display new data.


Working With Data Tables

The Data Tables display cashier and ticket analysis data per KPI. The results are ranked in the Data Tables from the worst to the best.

In the Data Tables, you can reorganize or streamline the displayed data in order to create a different focus; this includes continuing to filter data via Criteria if needed.

By default the Data Tables use icons to represent positive “Within Average” values or negative “Outside of Average” values.

Outside of Average = Values that defer from the store’s average for the selected time period and are illustrated by a red X icon 

Within Average = Values that are within the store average for the time period and are illustrated by a green checkmark icon 

To toggle between the icons and the actual numerical values, click Real Values from the top right corner of the Data Table.

To sort Ascending or Descending, double-click on the column heading in a Data Table.

Investigating Suspect Cashiers and Tickets

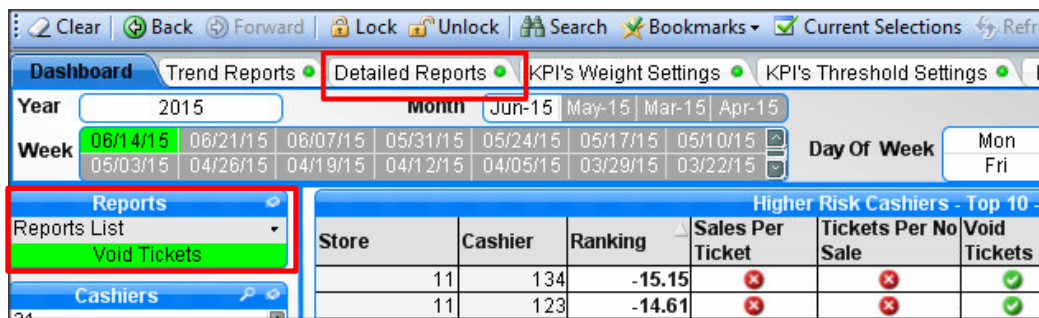
After generating lists of specific datasets in the Data Tables, Cashier Analyzer provides the means by which to perform the next logical step in the workflow, which is to drill down for more specific information. This section describes how to access this information by creating various kinds of reports.

Creating Detailed Reports

Detailed reports enable further analysis of the information displayed in the Data Tables and break it up into reports of more detailed KPIs

Note: When analyzing data of this sort the threshold settings are ignored and all available data is displayed.

To view detailed reports, click on the Detailed Reports tab and select the desired report from the Reports Criteria drop down list.



The following table provides a description of the reports available for selection in the drop down listing.

Report	Explanation
Cashier Voids	Compares the ratio of voids in \$ to the sales amount in \$ between the cashier and the relevant store.
Void Tickets	Shows the void amount per ticket and the ratio of the void amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Refunds	Compares the ratio of refunds in \$ to the sales amount in \$ between the cashier and the relevant store.
Refund Tickets	Shows the refund amount per ticket and the ratio of the refund amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Canceled Items	Compares the ratio of cancelled items (also known as line item voids) in \$ to the sales amount in \$ between the cashier and the relevant store.
Canceled Tickets	Shows the cancelled amount per ticket and the ratio of the cancelled amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Open Rings	Compares the ratio of open department rings in \$ to the sales amount in \$ between the cashier and the relevant store.

Report	Explanation
Open Rings Tickets	Shows the open department rings amount per ticket and the ratio of the open department rings amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Discounts	Compares the ratio of discounts in \$ to the sales amount in \$ between the cashier and the relevant store.
Discount Tickets	Shows the discount amount per ticket and the ratio of the discount amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Coupons	Compares the ratio of coupons in \$ to the sales amount in \$ between the cashier and the relevant store.
Coupon Tickets	Shows the coupon amount per ticket and the ratio of the coupon amount to the sales amount as well as the # of items per ticket. # of events represents count of times any KPI event occurred on the ticket.
Cashier Sale/Ticket	Compares the sales amount per tickets between the cashier and the relevant store.
Cashier Tickets/No-Sale	Compares the ratio of ticket amounts to the number of times the cashier opened the Cash Drawer.
KPI Scoring	A consolidated report of the eight KPIs in the Data Table
High Risk Cashiers	Report of the problematic cashiers and relevant stores sorted according to the ranking algorithm. This report is the same as displayed on the dashboard but not limited to Top 10.
Cashier Stats	Additional information about cashiers that is not included in KPI data tables

Viewing Ticket Trends (Tickets Before/After)

This feature provides additional functionality to Detailed Reports by enabling focus on one specific ticket, and viewing the in a single data table the tickets prior to and after the selected ticket. The # of tickets to view before and after a selected ticket defaults to 10. Instructions on how to change the default value can be found in the [Adjusting the Threshold Settings](#) section.

Selecting a ticket and then requesting the 10 prior and 10 post tickets is called “Trend” in the Cashier Analyzer application. The next section details how to Trend a specific ticket and review the data.

1. Click the Detailed Reports tab on the Dashboard.
2. Select a relevant report for viewing tickets in the Reports drop down listing.
 - a. Refund Tickets
 - b. Void Tickets
 - c. Canceled Tickets
 - d. Open Ring Tickets
 - e. Discount Tickets
 - f. Coupon Tickets
 - g. Cashier Sale/Ticket
3. Click on the Trend button on the upper right corner of the data table.

- a. This will change the EJ column in the data table to the Trend column, and place a Trend icon on each ticket row.

Ticket	Date & Time	Ranking	Void	Cancel	Refunds	Discounts	Coupons
2	9106 2015-08-24 08:16:21	-31,019.78	✓	✗	✓	✗	✓
7	8575 2015-08-24 11:21:56	-26,841.08	✓	✗	✓	✗	✓
8	8911 2015-08-24 17:33:33	-20,594.65	✓	✗	✗	✓	✓
3	7720 2015-08-24 21:16:04	-11,980.00	✓	✗	✗	✓	✓
4	6738 2015-08-24 09:22:20	-9,580.00	✓	✗	✗	✓	✓
9	2006 2015-08-24 15:19:18	-4,568.89	✓	✗	✗	✓	✓

- 4. Select a ticket by clicking once on the Trend icon on the ticket row

Trend	Store	Cashi
✗	543	
✗	51	
✗	59	
✗	171	
✗	56	
✗	215	
✗	215	
✗	543	
✗	542	
✗	215	

- a. This will change the view to a data table containing the selected ticket and the tickets both before/after the selected ticket for that Cashier and register.

Note: Trending is tied to the Cashier/Register combination. If the cashier works at multiple registers in the same day, this report will only display tickets created on the same register as the ticket that was used to generate the trend.

- 5. Sample of a Trend report:

EJ	Store	Cashier	POS	Ticket	Date & Time	Ticket Total	Item Count
🔍	204...	303	3	2887	2015-11-02 16:44:23	\$ 1.76	2
🔍	204...	303	3	2888	2015-11-02 16:45:32	\$ 26.70	8
🔍	204...	303	3	2889	2015-11-02 16:46:32	\$ 29.28	8
🔍	204...	303	3	2890	2015-11-02 16:47:29	\$ 4.28	2
🔍	204...	303	3	2891	2015-11-02 16:49:11	\$ 13.71	3
🔍	204...	303	3	2892	2015-11-02 16:51:12	\$ 11.41	10
🔍	204...	303	3	2932	2015-11-03 11:01:22	\$ 33.88	12
🔍	204...	303	3	2933	2015-11-03 11:02:09	\$ 12.48	2
🔍	204...	303	3	2934	2015-11-03 11:03:07	\$ 0.00	0
🔍	204...	303	3	2934	2015-11-03 11:04:33	\$ 51.46	16
🔍	204...	303	3	2935	2015-11-03 11:05:37	\$ 6.28	2
🔍	204...	303	3	2936	2015-11-03 11:07:37	\$ 32.25	10
🔍	204...	303	3	2937	2015-11-03 11:08:39	\$ 11.90	9
🔍	204...	303	3	2938	2015-11-03 11:09:42	\$ 36.14	10
🔍	204...	303	3	2939	2015-11-03 11:12:20	\$ 81.45	7
🔍	204...	303	3	2940	2015-11-03 11:14:51	\$ 16.52	4
🔍	204...	303	3	2941	2015-11-03 11:16:48	\$ 10.47	3
🔍	204...	303	3	2942	2015-11-03 11:17:16	\$ 20.13	7
🔍	204...	303	3	2943	2015-11-03 11:18:29	\$ 18.59	4
🔍	204...	303	3	2944	2015-11-03 11:20:11	\$ -4.31	0
🔍	204...	303	3	2945	2015-11-03 11:20:48	\$ 8.99	1

- a. Note that the selected ticket is highlighted in yellow on the Trend report.
- b. Note that there is a green light on the Store, Cashier, and POS columns in the screenshot above. This is an indicator of the criteria used in the current filter for the trend.

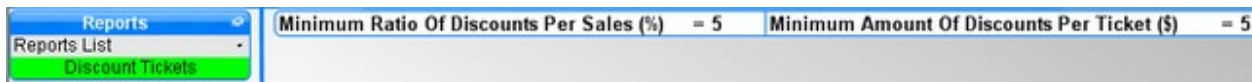
- c. Note that while Trending a ticket is tied to the Cashier/Register combination, it is not specific to the date. In the report above, the prior tickets go back to the previous day in order to satisfy the default number of tickets to display in a Trend data sample.
- d. Data results can quickly be placed in Excel for further evaluation by clicking on the XL button, as highlighted by the red arrow in the example above.

Adjusting The KPI Threshold Settings Within Detailed Reports

The KPI threshold settings can be adjusted while working with the Detailed reports. As mentioned in the section above when trending a ticket, 10 is the default number for tickets before and after the selected ticket. This number can be adjusted, as can other KPI settings.

Any changes to the KPI settings will remain during the active session. Once the session is logged off, KPI settings will revert to default values.

To change the KPI threshold settings, click the required value in the settings area at the top of the data table area and enter a new value. This example illustrates changes to the Discount Tickets KPI threshold settings.



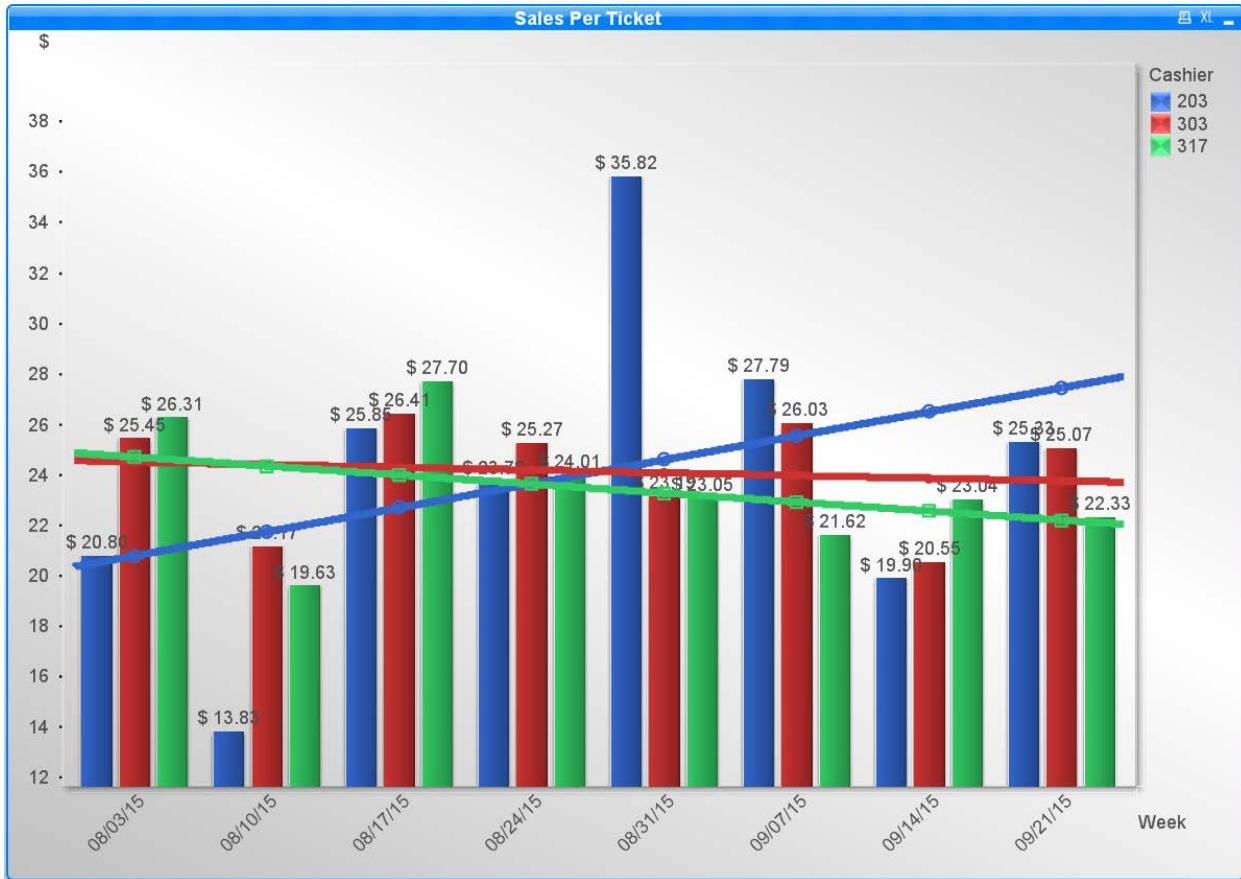
Creating Trend Reports (Comparing Cashier KPI Trends)

Trend reports enable selection of up to three cashiers in one store to view & compare their trends, or historical activity, at a glance per KPI over a 13 week period. The output is displayed in a colorful column chart.

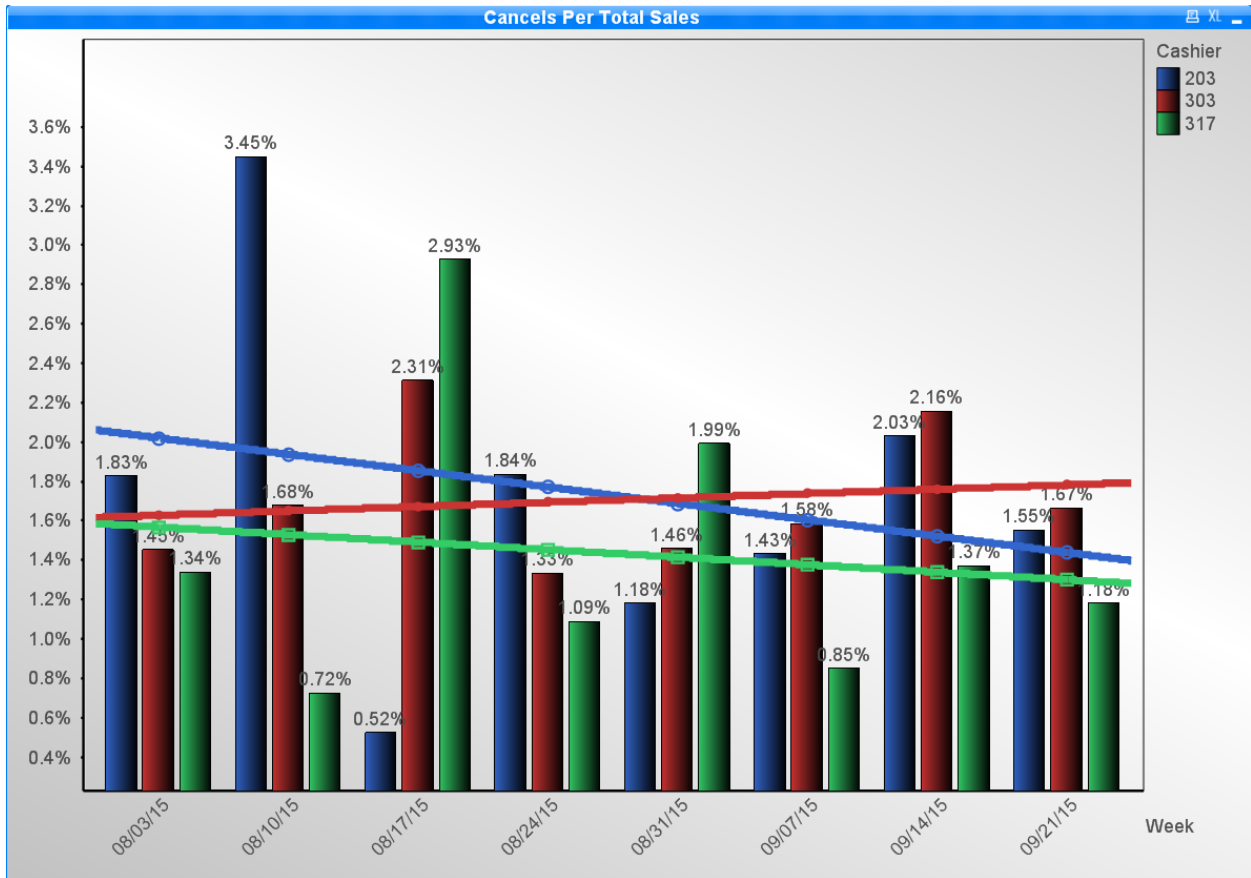
To generate a trend report, follow these steps.

1. Click on the Trend Reports tab. Note that the default screen is blank until criteria is selected for display.
2. Select a store and up to 3 cashiers.
 - a. The Sales Per Ticket trend report will display. If a cashier did not perform any transactions during the period, no data will be displayed for the cashier.
3. Select a specific date range, if desired.
 - a. Reminder – can select a date, hold down left mouse button and drag to select multiple dates, releasing the mouse button when done.
4. The Back button on the toolbar functions as an “undo” button. Click on it to undo the last selection, if applicable.
5. To “zoom in” on a specific date or date range in the report, place your cursor over the start of the area and drag by holding down the left mouse button. Release when at the end of the range to zoom on.
 - a. When placing your cursor in the graph it appears as a “+” symbol.
 - b. This will narrow the report results to just the dates selected.
 - c. To revert back, simply click on the Back button on the toolbar.

6. Below are some samples of KPI Trend Reports for Cashiers.



In the example above, Cashiers # 203, 303, & 317 are selected for the date ranges of 8/3/15 – 9/21/15 and displaying KPI Average Sales Per Ticket.



In the example above, Cashiers # 203, 303, & 317 are selected for the date ranges of 8/3/15 – 9/21/15 and displaying KPI Cancels Per Total Sales. (Reminder – “cancels” represents line item voids within a ticket.)



In the example above, Cashiers # 203, 303, & 317 are selected for the date ranges of 8/3/15 – 9/21/15 and displaying KPI Discounts Per Total Sales. Note in this example that cashier 203 does not have any applicable transactions between the dates of 8/13/15 – 9/21/15.

Working With KPI Weight Settings

Use this feature to control the weight given to each KPI in the ranking algorithm. Any number of KPI's can be selected for ranking analysis; however any KPI that should not be included in the analysis must be given a weight of 0%.

It is important to know these facts about working with KPI weight settings:

- The total for each level must equal 100% as shown by the Total field (illustrated in this screenshot)

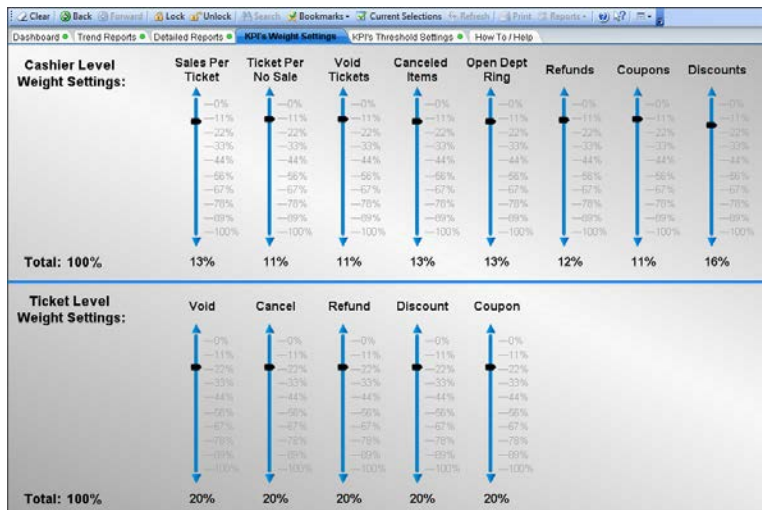


- The settings configured here result in an immediate and automatic change to the values shown in the Data Tables.
- The Total must equal 100% after adjusting to new levels before continuing back to viewing the reports.
- The settings configured here are PER CURRENT SESSION only. The settings will revert to the default values on the next login.
 - If it's desired to configure new default KPI weight settings, please email the setting value change(s) to Connected Services support at SaaS_CS_Dallas_Support_Team@ncr.com.

Adjusting The Weight Settings

To adjust the KPI Weight settings, please follow these steps:

- Click the KPI Weight Settings tab. The following screen will open:



2. There are several ways to adjust the settings –
 - a. Use your cursor to move the sliders by clicking on the button and dragging it, or
 - b. Click on the slider bar once, then use your mouse wheel button to move the setting value up or down
3. Continue to adjust as many KPIs as necessary until the desired ranking is configured.
 - a. Reminder – Total KPI value must equal 100%

Adjusting The KPI Threshold Settings

This feature provides the ability to determine which data is relevant or not relevant for analysis. The maximum and minimum amounts to be considered for each KPI at both the Cashier and Ticket level can be adjusted, which will effect what data is displayed on the Dashboard and the Detailed Reports. For example, you might not want to consider data in your display where

- Ticket sale amount is less than \$30
- Void amount is less than \$10
- Discount per ticket amount is less than \$5

These are examples of how thresholds may be configured but not recommendations, each retailer will have to determine what settings are best for their environment, if the default values are not suitable. Additionally, each threshold can be accessed directly within the Detailed Report. Our recommendation is to generate the desired Detailed Report, then adjust the threshold settings while working with the data in the Data Tables.

Note: After the current session has been closed, the KPI Threshold Settings will revert to the default values.

To adjust the threshold settings, please follow these steps:

1. Click on the KPI Threshold Settings tab. The following screen will appear:

Dashboard - Cashier Level KPI Ratio		Store Analysis Hours	
Maximum Ratio Of Sales Per Ticket (\$)	= 100	All Hours	Default Analysis Hours
Maximum Ratio Of Tickets Per No Sale	= 80		Information Box:
Minimum Ratio Of Void Per Total Sales (%)	= 0		5, 00:00 - 00:00
Minimum Ratio Of Cancels Per Total Sales (%)	= 0		6, 00:00 - 00:00
Minimum Ratio Of Open Rings Per Total Sales (%)	= 0		11, 00:00 - 00:00
Minimum Ratio Of Refunds Per Total Sales (%)	= 0		12, 00:00 - 00:00
Minimum Ratio Of Coupons Per Total Sales (%)	= 0		14, 00:00 - 00:00
Minimum Ratio Of Discount Per Total Sales (%)	= 0		16, 00:00 - 00:00
Dashboard - Ticket Level KPI Ratio		Cashier Exclusions	
Minimum Ratio Of Cancels Per Sales (%)	= 0	All Cashiers	Default Cashiers
Minimum Amount Of Cancels Per Ticket (\$)	= 0		Information Box:
Minimum Ratio Of Discounts Per Sales (%)	= 0		
Minimum Amount Of Discounts Per Ticket (\$)	= 0		
Minimum Ratio Of Refunds Per Sales (%)	= 0		
Minimum Amount Of Refunds Per Ticket	= 0		
Minimum Ratio Of Coupons Per Sales (%)	= 0		
Minimum Amount Of Coupons Per Ticket (\$)	= 0		
Minimum Amount Of Void (\$)	= 0		
Minimum Amount Of Open Rings (\$)	=		
Maximum Amount Of Open Rings (\$)	=		
Additional Thresholds		POS Exclusions	
Minimum Ratio Of Department Sales Per Total Sales (%)	= 2	All POS	Default POS
			Information Box:
Show Tickets Before/After	= 10		

- Change any/all of the amount values in the Cashier Level KPI Ratio or the Ticket Level KPI Ratio or the Additional Thresholds setting. Click once on the numeric threshold setting. The value will change to “edit mode” with the current value set against a black background, as illustrated in this screenshot:

Dashboard - Cashier Level KPI Ratio	
Maximum Ratio Of Sales Per Ticket (\$)	= 100
Minimum Ratio Of Tickets Per No Sale	= 80

- Enter a new value in the field, then click ENTER on your keyboard. The new value will be saved.
- Repeat for as many threshold settings as desired.

Note: The changes will only remain for the duration of your current session. Upon logging out of the application, all settings will return to the default values.

- Each setting is described in more detail in this table:

Threshold	Explanation
Maximum Ratio of Sales Per Ticket (\$)	The application will consider monetary amounts of sales per ticket for screen display as part of this KPI only if they are at or above the defined amount. Default = 0
Maximum Ratio of Tickets Per No Sale	The application will consider tickets per no sale transactions for screen display only if the defined ratio is at or above the defined amount. Default = 0
Minimum Ratio of Void Per Total Sales (%)	The application will consider void transactions per complete amount of total sales for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Cancels Per Total Sales (%)	The application will consider cancel (line item void) transactions per complete amount of total sales for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Open Rings Per Total Sales (%)	The application will consider open ring (department) transactions per complete amount of sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Refunds Per Total Sales (%)	The application will consider refund transactions per complete amount of sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Coupons Per Total Sale (%)	The application will consider coupon transactions per complete amount of total sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Discount Per Total Sales (%)	The application will consider discount transactions per complete amount of total sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Cancels Per Sales (%)	The application will consider cancel transactions per complete amount of total sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Amount of Cancels Per Ticket (\$)	The application will consider only monetary amounts of cancels (line item voids) per ticket only if they are at or above this defined amount. Default = 0

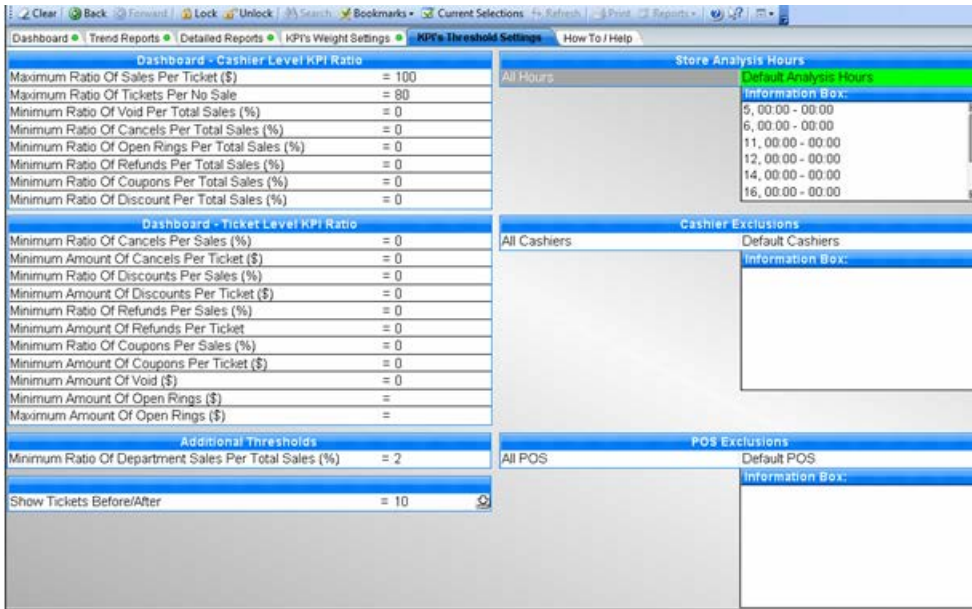
Threshold	Explanation
Minimum Ratio of Discounts Per Sales (%)	The application will consider discount transactions per complete amount of sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Amount of Discounts Per Ticket (\$)	The application will consider monetary amounts of discounts for screen display only if they are at or above this defined amount per ticket. Default = 0
Minimum Ratio of Refunds Per Sales (%)	The application will consider refund transactions per complete amount of sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Ratio of Refunds Per Ticket	The application will consider monetary amounts of refunds per ticket for screen display only if they are at or above this defined value. Default = 0
Minimum Ratio of Coupons Per Sales (%)	The application will consider coupon transactions per complete amount of sales transactions for screen display only if the ratio is at or above this defined value. Default = 0
Minimum Amount of Coupons Per Ticket (%)	The application will consider monetary amounts of coupons per ticket for screen display only if they are at or above this defined amount. Default = 0
Minimum Amount of Void (\$)	The application will consider voided tickets for screen display only if they are above this amount. Default = 0 It is important to understand this setting. When it is zero, tickets will appear in the display where the ticket total is equal to or greater than zero. Refund tickets can also contain voids, and a refund ticket is typically less than zero. In order to see void items on refund tickets, change the default value to some number that is less than zero, such as -200.
Minimum Ratio of Department Sales Per Total Sales (%)	The application will consider department sales transactions per complete amount of total sales transactions for screen display only if the ratio is at or above this defined value. Default = 2
Show Tickets Before/After	Define how many tickets to display in the Data Tables when trending a ticket. See section Viewing Ticket Trends (Before/After) for more information on Trending. Default = 10

Adjusting Criteria Settings

By using the Criteria setting feature, values can be included or alternatively excluded from the Cashiers and POS groups in your analysis. Additionally, the range of transactions to view can be limited by adjusting the pre-defined hours per store. By default, all stores are set to 24 hour Open window, to ensure all tickets are displayed on the application.

To view the Criteria settings, follow these steps:

1. Click the KPI's Threshold Settings tab. The following window appears. Criteria settings are on the right hand side of the display, and are Store Analysis Hours, Cashier Exclusions, and POS Exclusions.



2. Store Analysis Hours – this information box lists each store and the store hours for analysis. If no specific hours have been preconfigured the display time will be 00:00 – 00:00, indicating the store’s entire business day is subject to analysis.
 - a. The default values can be changed by contacting the Cashier Analyzer support team. This list is view only.
3. Cashier Exclusions – this information box lists any pre-configured cashiers who are excluded from analysis by default.
 - a. The default values can be changed by contacting the Cashier Analyzer support team. This list is view only.
4. POS Exclusions – this information box lists any pre-configured POS (register or lane) that is excluded from analysis by default.
 - a. The default values can be changed by contacting the Cashier Analyzer support team. This list is view only.

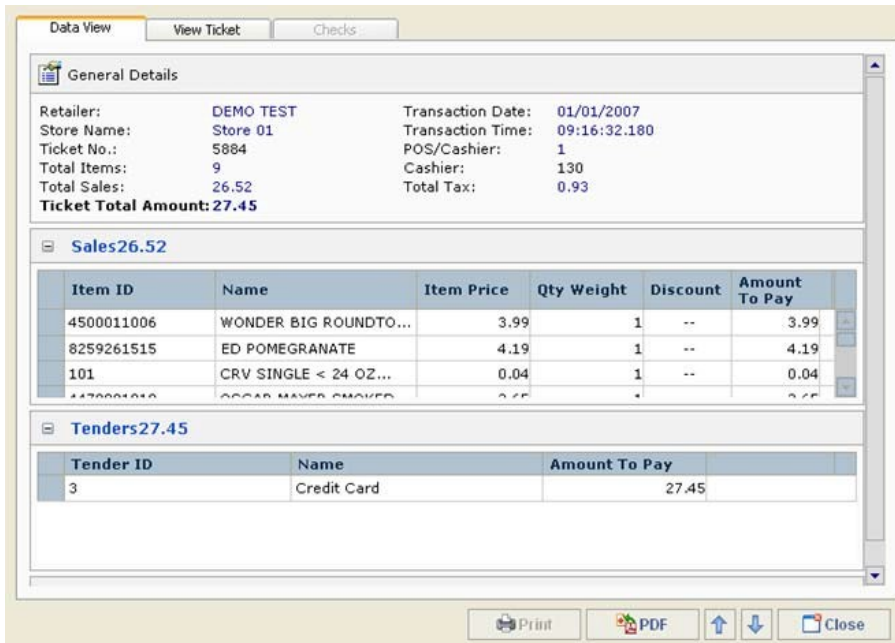
Using The Electronic Journal within Cashier Analyzer

The Electronic Journal (EJ) is another application that works hand in hand with the Cashier Analyzer application. Cashier Analyzer provides summary level analytics, and the EJ application enables a detailed view of the actual ticket. This is useful to present additional information not contained in the dashboard display about a ticket that is of interest.

To access EJ, you must also be logged in to the www.storenext.com website while using Cashier Analyzer. Additionally, any restrictions on your user account for viewing stores will be applied within the EJ tool and you will only see stores and receipts that you are authorized to view.

This detailed view is accessed by clicking on the magnifying glass icon on the same row as the ticket in the data table. Clicking on the magnifying glass icon will launch a pop-up that displays the actual receipt image, or a replicated receipt image (which version appears is dependent on the POS that is in use). The screen shots below illustrate the different data views of the detailed ticket, beginning with the receipt image.





The second view (above) is the detail behind the receipt. Every item that was entered on the ticket, whether cancelled, voided, refunded or discounted is represented in the data table. Tender information and discount information is also included as separate data tables in this same view.

Note: The Electronic Journal application will timeout after inactivity periods, and this session timeout can occur while Cashier Analyzer remains active. A symptom of this timeout is attempting to launch a ticket detail and nothing loads after a few minutes. If this occurs, resolution is to logout of the www.storenext.com browser page and log back in.

Electronic Journal and Cashier Analyzer – Sales Tax

It is important to note one area of difference between the Electronic Journal and Cashier Analyzer applications. Sales tax is not loaded into Cashier Analyzer. Ticket Total amounts in Cashier Analyzer are therefore, a pre-tax total. When viewing a ticket in both applications, the Ticket Total in Electronic Journal will include the sales tax.

Here are some screenshots to illustrate the difference in the two applications when viewing the same ticket. The ticket being illustrated is ticket #129, for cashier 106, pos #3, ticket total amount of \$8.44.

Minimum Ratio Of Discounts Per Sales (%) = 0						Minimum Amount Of Discounts Per Ticket (\$)					
EJ	Store	Cashier	POS	Ticket	Date & Time	Discount Amount	Ticket Total	Discount % of Ticket Sales	Item Count	Events	
	4507...	106	3	85	2015-11-11 15:55:08	\$ 0.40	\$ 3.59	11.14%	1	1	
	4507...	106	3	83	2015-11-11 15:51:43	\$ 0.30	\$ 2.69	11.15%	1	1	
	4507...	106	3	123	2015-11-11 18:57:08	\$ 0.23	\$ 2.06	11.17%	1	1	
	4507...	106	3	33	2015-11-11 12:46:42	\$ 0.07	\$ 0.62	11.29%	1	1	
	4507...	106	3	129	2015-11-11 19:10:06	\$ 0.94	\$ 8.44	11.14%	2	2	
	4507...	106	3	100	2015-11-11 14:25:40	\$ 0.57	\$ 5.11	11.15%	1	1	

Clicking on the magnifying glass on the specific ticket row will launch the Electronic Journal application and show the detailed ticket view, as illustrated below. In this view, note that Ticket Total Amount is \$9.20, which is the \$8.44 plus the sales tax amount of \$.76.

Ticket No.:	129	POS/Cashier:	3		
Total Items:	2	Cashier:	106		
Total Sales:	9.38	Total Tax:	0.76		
Ticket Total Amount: 9.20					
☒ Sales: 9.38					
Item ID	Name	Item Price	Qty Weight	Discount	Amount To Pay
5193305362	DB CHOC CKY 15.25Z C	1.89	1	--	1.89
5193334251	DOG FD 14# SPEC BLND	7.49	1	--	7.49
☒ Tenders: 9.20					
☒ Discounts: 0.94					
☒ Tax: 0.76					

Suggested CA Report Examples

The following is a list of suggested reports to get started with analyzing cashier behavior in your stores. Consider these as building blocks to familiarize and get comfortable with the data elements available. Every business has different goals and challenges; ultimately your Loss Prevention analysis of Cashier Analyzer data will drive your reporting to produce meaningful and relevant results.

Detailed Report	Suggestions for Use
Void Tickets	Run this detailed report and look for ticket anomalies, such as tickets with even \$ amounts, or same cashier with a pattern of multiple voided tickets netting out to zero. Look at highest \$ tickets and lowest \$ tickets, using sort ascending/descending by double-clicking on the Ticket Total header.
Refund Tickets	Run this detailed report, sort by the "Ticket Total" column. Look at the largest \$ amounts and the smallest \$ amounts. Look for even \$ amounts such as \$25.00 or \$100.00. Set a value in the Minimum Amount of Refunds Per Ticket criteria setting. For example, set 100 to find all refunds that are over \$100. Sort by the Date/Time column; analyze refunds that occurred prior to store opening or after store closing.
Canceled Tickets	Run this detailed report. Sort ascending and descending by the "Ticket Total" column. Look for Penny (.01) totals, a possible indication of a cashier ringing up items, cancelling all off the ticket except for a penny. This is sometimes done when a cashier does not have Void Ticket ability and wants to get around manager over-ride.
Open Rings Tickets	Run this detailed report. There are several ways to easily pick data to look at. Sort descending by column "Open Rings % of Ticket" and look at the tickets where the open ring amount was larger than the total ticket amount. Sort descending by column "Open Ring Item Count" and look at tickets with high count of open rings. Look at tickets where the open ring item count is greater than the total ticket Item counts. These are just some tips, there are many ways to look at data on this report.
Discount Tickets	Run this detailed report. Sort by "Discount % of Ticket Sales" column or by the "Ticket Total" column, both ascending and descending, to search for any unusual discount amounts.
Coupon Tickets	Run this detailed report. Sort by "Coupon % of Ticket Sales" column or by the "Ticket total" column, both ascending and descending, to search for any unusual amounts.
Cashier Sale/Ticket	Run this detailed report. Search to see if a cashier is above or below the store average in the amount of sales occurring per ticket. Sort by the "Cashier Sales Per Ticket" column, both ascending and descending to look for anomalies.
Cashier Tickets/No-Sale	Run this detailed report. Sort descending on the column "Cashier Tickets Per No Sales Events". Sort descending on the column "Score" and review the cashiers that have the highest count of no sales per # of tickets for anomalies. Use either of these sorts to identify cashiers to look at in more detail. Then use the EJ to filter on cashier and no sale to view further information about the transactions.
KPI Scoring	Run this detailed report. Presents all KPI data in real numbers across all stores/all cashiers. Sort ascending/descending in each column to look for anomalies. Note – filter to look at a store at a time for more detail.
High Risk Cashiers	Run this detailed report. Report is an expansion of the Top 10 and includes every cashier.
Cashier Stats	Run this detailed report. Presents various cashier stats that can be used for comparison across chain. Sort, filter to drill into areas of interest.

General Information For Working With CA

This section will provide a list of “for your information” items to help understand the data presented in Cashier Analyzer.

Ticket Duplication in Data Tables

In this screenshot example (below), ticket #3209 is listed twice in the CA data table. This typically occurs when an action such as “PLU Not Found” or “Cash Drawer Opened” occurs during an ongoing ticket. It varies from Retailer to Retailer depending on the POS software that is being used in the store and how the information is written to the daily transaction log. There is no cause for concern; we are highlighting this example for explanation purposes only. The “extra” ticket record will have zero ticket total amount and zero item counts.

Ticket Trend							Back To Reports	
EJ	Store	Cashier	POS	Ticket	Date & Time	Ticket Total	Item Count	
	204...	303	3	3203	2015-11-03 16:59:35	\$ 21.02	5	
	204...	303	3	3204	2015-11-03 17:00:14	\$ 4.09	1	
	204...	303	3	3205	2015-11-03 17:00:38	\$ 12.63	4	
	204...	303	3	3206	2015-11-03 17:00:55	\$ 124.67	27	
	204...	303	3	3207	2015-11-03 17:03:42	\$ 5.79	5	
	204...	303	3	3208	2015-11-03 17:04:09	\$ 13.86	2	
	204...	303	3	3209	2015-11-03 17:05:22	\$ 0.00	0	
	204...	303	3	3209	2015-11-03 17:05:36	\$ 21.02	6	
	204...	303	3	3210	2015-11-03 17:06:40	\$ 38.10	14	
	204...	303	3	3211	2015-11-03 17:40:01	\$ 117.86	46	
	204...	303	3	3212	2015-11-03 17:43:24	\$ 263.13	55	
	204...	303	3	3213	2015-11-03 17:56:14	\$ 33.28	9	
	204...	303	3	3214	2015-11-03 17:57:47	\$ 28.32	15	
	204...	303	3	3215	2015-11-03 17:59:23	\$ 14.09	5	
	204...	303	3	3216	2015-11-03 17:59:58	\$ 31.27	8	
	204...	303	3	3217	2015-11-03 18:00:35	\$ 24.85	6	
	204...	303	3	3218	2015-11-03 18:01:19	\$ 10.02	2	
	204...	303	3	3219	2015-11-03 18:01:54	\$ 2.00	4	
	204...	303	3	3220	2015-11-03 18:03:16	\$ 29.50	5	
	204...	303	3	3221	2015-11-03 18:08:12	\$ 9.41	8	
	204...	303	3	3222	2015-11-03 18:09:53	\$ 0.00	1	

Refund Tickets in Cashier Analyzer

Refund data is defined in two ways in Cashier Analyzer. Either the ticket is a “refund” ticket – indicated by the cashier utilizing the Refund key, or in some manner initiating a refund transaction; or the ticket is a sales ticket with a line item refund. These two types of refund events are flagged as separate and distinct in the relational database.

Cashier Analyzer recalculates ticket totals when preparing the dashboard view. Tickets where the entire transaction is considered a Refund do not have a total amount, by design, displayed in Cashier Analyzer, as they are not true sales tickets. On the other hand, a sales ticket with a refund line item will have a ticket total amount in Cashier Analyzer.

This is best illustrated in the following examples. Beginning with a view of the ticket as it appears in the Electronic Journal (below), we can see a ticket total amount of -\$16.23, and a notation of “return transaction” at the top of the receipt image.

new Ticket Checks

RETURN TRANSACTION

BAKERY		
HOT DOG BUN		-3.49 N F
DELI		
AMERICAN POTATO		
0.54 lb @ -3.99/ lb		-2.55 N F
MUSTARD POTATO		
0.53 lb @ -3.99/ lb		-2.11 N F
TOMATO BASIL PA		
0.33 lb @ -5.99/ lb		-1.95 N F
TRADITIONAL SLA		
0.78 lb @ -3.99/ lb		-3.13 N F
GROCERY		
BEANS BAKED PORK		
1 @ 2 FOR -3.00		-1.50 N F
You saved -4.49		
BEANS BAKED PORK		
1 @ 2 FOR -3.00		-1.50 N F
You saved -4.49		
BALANCE DUE		-16.23
CHANGE		16.23
Your Savings Today:		
TOTAL DISCOUNTS	-2	-8.98
Total number of items sold = -7		
CASHIER NAME: Raelyn		
STORE: 00604 REGISTER: 002 CASHIER: 0203		
TICKET#: 1133 24JUL2015 7:47:43		

Viewing the same ticket in the Cashier Analyzer dashboard, we see a Refund Amount of -\$16.23; and a Ticket Total amount of \$0.0.

Dashboard Trend Reports Detailed Reports KPI's Weight Settings KPI's Threshold Settings How To / Help

Year: 2015 Month: Apr-15 | May-15 | Jun-15 | Jul-15 Last Updated At 08/07/2015 14:34 Clear

Week: 06/03/15 | 07/27/15 | **07/20/15** | 07/13/15 | 07/06/15 | 06/29/15 | 06/22/15
 06/15/15 | 06/08/15 | 06/01/15 | 05/25/15 | 05/18/15 | 05/11/15 | 05/04/15 Day Of Week: Mon | Tue | Wed | Thu | Fri | Sat | Sun Date: 07/24/2015

Reports List: Refund Tickets Cashiers

Minimum Ratio Of Refunds Per Sales (%) = 0		Minimum Amount Of Refunds Per Ticket = 0								
EJ	Store	Cashier	POS	Ticket	Date & Time	Refund Amount	Ticket Total	Refund % of Ticket Sales	Item Count	Events
	604 Rochester ...	203	2	1133	2015-07-24 07:47:04	\$-16.23	\$ 0.00	-100.00%	-7	7
	604 Rochester ...	203	8	455	2015-07-24 12:28:35	\$-13.98	\$-10.49	133.27%	0	3

Voids and Cancels of Refunds in Cashier Analyzer

If a Refund ticket is voided (whole ticket is cancelled), it is important to note the display differences for this ticket in Cashier Analyzer. This ticket would NOT appear on the Refund Ticket report, as the refund wasn't retained. This ticket would appear on the Void Ticket report, as this report will display any ticket that was voided, regardless of sale or refund status.

If a line item on a Refund Ticket is voided, the ticket will NOT appear on the Cancelled Ticket Report, but will appear on the Refund Ticket detailed report.

Understanding the Events Count

Events column is a count of the # of times any action tracked as a KPI occurred on a ticket. Note, when reviewing a detailed report such as Cancelled Tickets, the event column on the report is not limited to displaying only the count of cancelled line items. The event column is all-inclusive and will include the count of any events that occurred on that ticket.



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