



RICS REPORTING STRATEGY

LEARN WHY, HOW, WHEN, AND WHAT REPORTS TO RUN

GUIDE OVERVIEW

This guide's purpose is to align suggested retail reporting best practices with available RICS reports to show you why, how, when, and what reports to run. The Table of Contents has hyperlinks to each section and the tabs are clickable throughout. Our Service Team is available to answer your questions and help you get the most from RICS Reporting.

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DASHBOARD

MONTHLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify changes in the market by comparing supplier or class performance from one sales period to another	SALES COMPARISON	Group By: Suppliers or Class Sales Period: Previous Month or Month to Yesterday Compare Sales Period: Same Period Previous Year Include Coupons: Select Value Inventory At: Average Cost or Retail Price	Report Criteria: Leave blank to report on all suppliers or classes	<ul style="list-style-type: none"> Evaluate Profit, ROI, and Turns % Change columns Isolate significant changes in the market
Identify strong and weak performing classes based on ROI or Quantity Sold	SALES ANALYSIS (CLASS)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Class Report Type: Class Summary Value Inventory at: Average Cost Report Column 1: Previous Month or Month to Yesterday Report Column 2: Same Period Previous Year or Year to Yesterday Class Depth: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all classes	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify strong and weak performing SKUs by class based on ROI or Quantity Sold	SALES ANALYSIS (SKUS BY CLASS)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Class Report Type: SKU Detail Value Inventory at: Average Cost Report Column 1: Previous Month or Month to Yesterday Report Column 2: Same Period Previous Year or Year to Yesterday Class Depth: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all classes or use the By Class dropdown menu to select a strong or weak performing class	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify strong and weak performing suppliers based on ROI or Quantity Sold	SALES ANALYSIS (SUPPLIER)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Supplier Report Type: Supplier Summary Value Inventory at: Average Cost Report Column 1: Previous Month or Month to Yesterday Report Column 2: Same Period Previous Year or Year to Yesterday	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify strong and weak performing SKUs by supplier based on ROI or Quantity Sold	SALES ANALYSIS (SKUS BY SUPPLIER)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Supplier Report Type: SKU Detail Value Inventory at: Average Cost Report Column 1: Previous Month or Month to Yesterday Report Column 2: Same Period Previous Year or Year to Yesterday	Report Criteria: Leave blank to report on all suppliers or enter one or more strong or weak performing supplier codes in the By Supplier field	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify top 10 performing classes based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (CLASS)	Sales Period: Previous Month or Month to Yesterday Include Coupons: Select Best Of: Class Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes	<ul style="list-style-type: none"> Increase model stock Re-order product Broaden similar selection

MONTHLY (CONTINUED)

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify top 10 performing SKUs by class based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY CLASS)	<p>Sales Period: Previous Month or Month to Yesterday Include Coupons: Select Best Of: SKUs by Class Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all classes or use the By Class dropdown to select one or more top 10 performing classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify top 10 performing suppliers based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SUPPLIER)	<p>Sales Period: Previous Month or Month to Yesterday Include Coupons: Select Best Of: Supplier Group By: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all suppliers Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify top 10 performing SKUs by supplier based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY SUPPLIER)	<p>Sales Period: Previous Month or Month to Yesterday Include Coupons: Select Best Of: SKUs by Supplier Group B: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all suppliers or enter one or more top 10 performing supplier codes in the By Supplier field Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify SKUs by supplier with less than ___ or zero units sold	BEST / WORST SELLERS (SKU BY SUPPLIER)	<p>Sales Period: Previous Month or Month to Yesterday Best Of: SKUs by Supplier Group By: None In Order Of: Quantity Sold (least popular) Show Items: Worst Below a Cutoff Point Cutoff Point of Items to Print: 1 or the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all suppliers Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Decrease model stock • Cancel incoming orders • Implement markdowns • Remerchandise sales floor
Identify incoming SKUs to compare to Sales Analysis or Best / Worst Sellers report	PURCHASE ORDER REPORT	<p>In Order of: Supplier Report Detail: SKU Detail or SKU Which POs Would You Like to Include: Purchase Orders (At-Once POs and Future POs) Open POs Only: Select to exclude closed POs What is the Date Range for Shipping: Selected Dates (date range beginning today)</p>	<p>Report Criteria: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Adjust purchase order quantities • Cancel incoming orders

QUARTERLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify changes in the market by comparing supplier or class performance from one sales period to another	SALES COMPARISON	Group By: Suppliers or Class Sales Period: Last # Months (3-4 Months) Compare Sales Period: Same Period Previous Year Include Coupons: Select Value Inventory At: Average Cost or Retail Price	Report Criteria: Leave blank to report on all suppliers or classes	<ul style="list-style-type: none"> Evaluate Profit, ROI, and Turns % Change columns Isolate significant changes in the market
Identify strong and weak performing classes based on ROI or Quantity Sold	SALES ANALYSIS (CLASS)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Class Report Type: Class Summary Value Inventory at: Average Cost Report Column 1: Last # Months (3 or 4 Months) Report Column 2: Same Period Previous Year or Year to Yesterday Class Depth: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all classes	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify strong and weak performing suppliers based on ROI or Quantity Sold	SALES ANALYSIS (SUPPLIER)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Supplier Report Type: Supplier Summary Value Inventory at: Average Cost Report Column 1: Last # Months (3 or 4 Months) Report Column 2: Same Period Previous Year or Year to Yesterday	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify strong and weak performing SKUs by supplier based on ROI or Quantity Sold	SALES ANALYSIS (SKUS BY SUPPLIER)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Supplier Report Type: SKU Detail Value Inventory at: Average Cost Report Column 1: Last # Months (3 or 4 Months) Report Column 2: Same Period Previous Year or Year to Yesterday	Report Criteria: Leave blank to report on all suppliers or enter one or more strong or weak performing supplier codes in the By Supplier field	<ul style="list-style-type: none"> Broaden/reduce similar selection Implement markdowns Remerchandise sales floor
Identify top 10 performing classes based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (CLASS)	Sales Period: Last # Months (3 or 4 Months) Include Coupons: Select Best Of: Classes Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes	<ul style="list-style-type: none"> Increase model stock Re-order product Broaden similar selection
Identify top 10 performing SKUs by class based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY CLASS)	Sales Period: Last # Months (3 or 4 Months) Include Coupons: Select Best Of: SKUs by Classes Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all classes or use the By Class dropdown to select one or more top 10 performing classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes	<ul style="list-style-type: none"> Increase model stock Re-order product Broaden similar selection

QUARTERLY (CONTINUED)

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify top 10 performing suppliers based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SUPPLIER)	Sales Period: Last # Months (3 or 4 Months) Include Coupons: Select Best Of: Supplier Group By: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all suppliers Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Increase model stock Re-order product Broaden similar selection
Identify top 10 performing SKUs by supplier based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY SUPPLIER)	Sales Period: Last # Months (3 or 4 Months) Include Coupons: Select Best Of: SKUs by Supplier Group B: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all suppliers or enter one or more top 10 performing supplier codes in the By Supplier field Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Increase model stock Re-order product Broaden similar selection
Identify SKUs by supplier with less than ___ or zero units sold	BEST / WORST SELLERS (SKU BY SUPPLIER)	Sales Period: Last # Months (3 or 4 Months) Best Of: SKUs by Supplier Group By: None In Order Of: Quantity Sold (least popular) Show Items: Worst Below a Cutoff Point Cutoff Point of Items to Print: 1 or desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all suppliers Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Decrease model stock Cancel incoming orders Implement markdowns Remerchandise sales floor
Identify size and width sales performance by supplier to ensure adequate stock is available based on previous sales demand	GRID ANALYSIS	Group By: Supplier Print SKU Detail In Each Group: Select to display SKU and size grid information Combine SKUs by Description: Select to consolidate Styles with the same description	Report Criteria: Leave blank to report on all suppliers or enter one or more supplier codes in the By Supplier field Printing Options: Select On-Hand, Sales Period 1 (Quantity, %, and Sell Thru %) and use the Sales Period 1 dropdown menu to select Last # Months (3 or 4)	<ul style="list-style-type: none"> Broaden/reduce similar selection Re-order product Cancel incoming orders
Identify incoming product by supplier to ensure adequate stock based on previous sales demand	OPEN PO'S QUANTITIES BY MONTH	Group By: Supplier Print SKU Detail In Each Group: Select to display SKU and size grid information Which POs Would You Like to Include: Purchase Orders (At-Once POs and Future POs) Report Date: Leave blank for today's date or enter a 12 month start date Value: Open Qty or Open Cost Analyze Date: Ship Date	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Adjust purchase order quantities Re-order product

YEARLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Compare supplier performance over a 12 month period to identify changes in the market	SALES BY MONTH	Group By: Suppliers Print SKU Detail In Each Group: Select to display SKU and sales information End Date: Leave blank for today's date or enter a 12 month start date Sale Types: Select Store Sale and any other necessary types Class Depth: Leave blank to analyze at the lowest class level Include Fields: Select Quantity Sold, Net Sales, ROI, and Turns along with any necessary field	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> • Broaden/reduce similar selection • Implement markdowns • Remerchandise sales floor
Identify changes in the market by comparing supplier or class performance from one sales period to another	SALES COMPARISON	Group By: Suppliers or Class Sales Period: Year to Yesterday or Previous Year Compare Sales Period: Same Period Previous Year Include Coupons: Select Value Inventory At: Average Cost or Retail Price Class Depth: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all suppliers or classes	<ul style="list-style-type: none"> • Evaluate Profit, ROI, and Turns % • Change columns • Isolate significant changes in the market
Identify strong and weak performing classes based on ROI or Quantity Sold	SALES ANALYSIS (CLASS)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Class Report Type: Class Summary Value Inventory at: Average Cost Report Column 1: Year to Yesterday or Previous Year Report Column 2: Same Period Previous Year or Year to Yesterday Class Depth: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all classes	<ul style="list-style-type: none"> • Broaden/reduce similar selection • Implement markdowns • Remerchandise sales floor
Identify strong and weak performing suppliers based on ROI or Quantity Sold	SALES ANALYSIS (SUPPLIER)	In Order Of: ROI (most valuable) or Quantity Sold (most popular) Analyze By: Supplier Report Type: Supplier Summary Value Inventory at: Average Cost Report Column 1: Year to Yesterday or Year to Yesterday Report Column 2: Same Period Previous Year or Year to Yesterday	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> • Broaden/reduce similar selection • Implement markdowns • Remerchandise sales floor
Identify top 10 performing classes based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (CLASS)	Sales Period: Year to Yesterday or Previous Year Include Coupons: Select Best Of: Classes Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost	Report Criteria: Leave blank to report on all classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection

YEARLY (CONTINUED)

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify top 10 performing SKUs by class based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY CLASS)	<p>Sales Period: Year to Yesterday or Previous Year Include Coupons: Select Best Of: SKUs by Classes Group By: None Class Depth: Leave blank to analyze at the lowest class level In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all classes or use the By Class dropdown to select one or more top 10 performing classes Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all classes</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify top 10 performing suppliers based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SUPPLIER)	<p>Sales Period: Year to Yesterday or Previous Year Include Coupons: Select Best Of: Supplier Group By: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all suppliers Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify top 10 performing SKUs by supplier based on ROI, Net Sales, or Quantity Sold	BEST / WORST SELLERS (SKU BY SUPPLIER)	<p>Sales Period: Year to Yesterday or Previous Year Include Coupons: Select Best Of: SKUs by Supplier Group B: None In Order Of: ROI (most valuable), Net Sales (most dollars), or Quantity Sold (most popular) Show Items: Top Number of Items Top # of Items to Print: Leave blank to view top 10 or enter the desired number Value Inventory At: Average Cost</p>	<p>Report Criteria: Leave blank to report on all suppliers or enter one or more top 10 performing supplier codes in the By Supplier field Printing Options: Select ROI and Turns option Aging Options: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Increase model stock • Re-order product • Broaden similar selection
Identify size and width sales performance by supplier to ensure adequate stock is available based on previous sales demand.	GRID ANALYSIS	<p>Group By: Suppliers Print SKU Detail In Each Group: Select to display SKU and size grid information Combine SKUs by Description: Select to consolidate Styles with the same description</p>	<p>Report Criteria: Leave blank to report on all suppliers or enter one or more supplier codes in the By Supplier field Printing Options: Select On-Hand, Sales Period 1 (Quantity, %, and Sell Thru %) and use the Sales Period 1 dropdown menu to select Year to Yesterday or Previous Year</p>	<ul style="list-style-type: none"> • Broaden/reduce similar selection • Re-order product • Cancel incoming orders
Identify incoming product by supplier to ensure adequate stock based on previous sales demand	OPEN PO'S QUANTITIES BY MONTH	<p>Group By: Suppliers Print SKU Detail In Each Group: Select to display SKU and purchase order information Which POs Would You Like to Include: Purchase Orders (At-Once POs and Future POs) Report Date: Leave blank for today's date or enter a 12 month start date Value: Open Qty or Open Cost Analyze Date: Ship Date</p>	<p>Report Criteria: Leave blank to report on all suppliers</p>	<ul style="list-style-type: none"> • Adjust purchase order quantities • Re-order product

WEEKLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Identify SKUs with negative on-hands	STOCK STATUS (NEGATIVE ON HAND)	In Order Of: Supplier Store Option: Separate Stores Which Items: Only items with a negative on-hand quantity	Report Criteria: Leave blank to report on all stores, suppliers, classes, and SKUs Printing Options: Select On Hand, Show Negative On-Hand, and On-Order (At Once & Future) for Which Quantities	<ul style="list-style-type: none"> Isolate duplicate SKUs (e.g. SKUs created multiple times) Identify if UPCs are assigned to the incorrect product Identify items sold but still on-order
Review purchase order cost and received quantities	INVENTORY DETAIL (SUPPLIER RECEIPTS BY PURCHASE ORDER)	Sales Period: Week to Yesterday or Previous Week Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Purchase Order Receipt	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Compare received quantities to packing slip Compare cost and received quantities to invoice
Review inventory adjustment(s) created via Receipt w/out Purchase Order	INVENTORY DETAIL (SUPPLIER RECEIPTS W/OUT PURCHASE ORDER)	Sales Period: Week to Yesterday or Previous Week Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Receipts w/out Purchase Order	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Investigate product removed from a store's on-hand inventory Identify receiving patterns and as needed provide training
Review SKUs added to non-sellable inventory	INVENTORY DETAIL (NON-SELLABLE AUDIT)	Sales Period: Week to Yesterday or Previous Week Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Into Non-Sellable	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Identify product quality issues and trends
Review transfer order received quantities (Multi-Store Organization Only)	INVENTORY DETAIL (SUPPLIER TRANSFER AUDIT)	Sales Period: Week to Yesterday or Previous Week Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Transfer Out, Transfer In, and In-Transit	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Compare received quantities to packing slip Investigate transfer patterns to ensure inventory is in the correct location
Review in-transit inventory (Multi-Store Organization Only)	TRANSFER SUMMARY	Sales Period: Week to Yesterday or Previous Week Show Details: Select	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Compare in-transit inventory to a negative on-hand report for items missed in the receiving process Compare in-transit inventory to a store's on-hand inventory for items missed in the receiving process Investigate transfer patterns to ensure inventory is in the correct location

MONTHLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review cost or quantity changes by supplier created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (SUPPLIER)	Analyze By: Supplier Value Inventory At: Average Cost Report Type: Supplier Summary Sales Period: Month to Yesterday or Previous Month Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant supplier changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Review cost or quantity changes by class created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (CLASS)	Analyze By: Class Value Inventory At: Average Cost Report Type: Class Summary Sales Period: Month to Yesterday or Previous Month Class Depth Limit: Leave blank to analyze at the lowest class level Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant class changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Identify a store's month end inventory	STOCK STATUS (MONTH END INVENTORY)	In Order Of: Supplier Store Option: Separate Stores Which Items: All Items Value Date: Last Day of Previous Month or Today if today is the last day of the month	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand, Show Negative On Hand and Costs for Which Quantities	<ul style="list-style-type: none"> Report on-hand inventory totals to accountant Verify on-hand accuracy
Identify SKUs with negative on-hands	STOCK STATUS (NEGATIVE ON HAND)	In Order Of: Supplier Store Option: Separate Stores Which Items: Only items with a negative on-hand quantity	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand, Show Negative On-Hand, On-Order (At Once & Future) for Which Quantities	<ul style="list-style-type: none"> Isolate duplicate SKUs (e.g. SKUs created multiple times) Identify if UPCs are assigned to the incorrect product Identify items sold but still on-order
Review inventory adjustment(s) created via Receipt w/out Purchase Order	INVENTORY DETAIL (SUPPLIER RECEIPTS W/OUT PURCHASE ORDER)	Sales Period: Month to Yesterday or Previous Month Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Receipts w/out Purchase Order	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Investigate product removed from a store's on-hand inventory Identify receiving patterns and provide training
Review SKUs added to non-sellable inventory	INVENTORY DETAIL (NON-SELLABLE AUDIT)	Sales Period: Month to Yesterday or Previous Month Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Into Non-Sellable	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Identify product quality issues and trends

MONTHLY (CONTINUED)

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review non-sellable batches completed via Return to Supplier	NON-SELLABLE INVENTORY (SKUS BY SUPPLIER)	Report Type: SKU by Supplier Include Size Detail: Select to display size information Include Return Codes: Select to display return code associated with product Include Items on a Completed Batch: Select Batch Completed Date Range: Month to Yesterday or Previous Month Class Depth Limit: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all suppliers or enter a supplier code(s) in the By Supplier field; select Return to Supplier in the By Batch Type	<ul style="list-style-type: none"> Identify product quality issues and trends Compare non-sellable batch cost and shipped quantities to supplier credit memos
Review non-sellable inventory not yet returned to a supplier	NON-SELLABLE INVENTORY (SKUS BY SUPPLIER)	Report Type: SKU by Supplier Include Size Detail: Select Include Return Codes: Select Include items Not on a Batch: Select Include Items on an Uncompleted Batch: Select Class Depth Limit: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Create and complete non-sellable batches to remove non-sellable inventory and receive a credit memo
Review in-transit inventory (Multi-Store Organization Only)	TRANSFER SUMMARY	Sales Period: Month to Yesterday or Previous Month Show Details: Select	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Compare in-transit inventory to a negative on-hand report for items missed in the receiving process Compare in-transit inventory to a store's on-hand inventory for items missed in the receiving process Investigate transfer patterns to ensure inventory is in the correct location

QUARTERLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review cost or quantity changes by supplier created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (SUPPLIER)	Analyze By: Supplier Value Inventory At: Average Cost Report Type: Supplier Summary Sales Period: Last # Months (3 or 4 Months) Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant supplier changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Review cost or quantity changes by class created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (CLASS)	Analyze By: Class Value Inventory At: Average Cost Report Type: Class Summary Sales Period: Last # Months (3 or 4 Months) Class Depth Limit: Leave blank to analyze at the lowest class level Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant class changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Identify SKUs with a limited size selection	STOCK STATUS (LIMITED SIZE SELECTION)	In Order Of: Supplier Store Option: Compare Stores in multi-store organization Which Items: Only Items with Less Than # Sizes On Hand Size Count: Enter 3 or a desired number	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand for Which Quantities and Costs for Also Print	<ul style="list-style-type: none"> Implement markdowns Combine inventory into single store (Multi-Store Organization Only)
Identify SKUs with negative on-hands	STOCK STATUS (NEGATIVE ON HAND)	In Order Of: Supplier Store Option: Separate Stores Which Items: Only items with a negative on-hand quantity	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand, Show Negative On-Hand, On-Order (At Once & Future) for Which Quantities	<ul style="list-style-type: none"> Isolate duplicate SKUs (e.g. SKUs created multiple times) Identify if UPCs are assigned to the incorrect product Identify items sold but still on-order
Review inventory adjustment(s) created via Receipt w/out Purchase Order	INVENTORY DETAIL (SUPPLIER RECEIPTS W/OUT PURCHASE ORDER)	Sales Period: Last # Months (3 or 4 Months) Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Receipts w/out Purchase Order	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Investigate product removed from a store's on-hand inventory Identify receiving patterns and provide training"
Review SKUs added to non-sellable inventory	INVENTORY DETAIL (NON-SELLABLE AUDIT)	Sales Period: Last # Months (3 or 4 Months) Include Costs and Pricing: Select Report Type: SKU Detail Sort By: Supplier/SKU Inventory Changes: Into Non-Sellable	Report Criteria: Leave blank to report on all stores, suppliers, classes and SKUs or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> Identify product quality issues and trends

QUARTERLY (CONTINUED)

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review non-sellable inventory not yet returned to a supplier	NON-SELLABLE INVENTORY (SKUS BY SUPPLIER)	Report Type: SKU by Supplier Include Size Detail: Select Include Return Codes: Select Include items not on a batch: Select Include Items on an uncompleted batch: Select Class Depth Limit: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> • Create and complete non-sellable batches to remove non-sellable inventory and receive a credit memo
Review in-transit inventory (Multi-Store Organization Only)	TRANSFER SUMMARY	Sales Period: Last # Months (3 or 4 Months) Show Details: Select	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Compare in-transit inventory to a negative on-hand report for items missed in the receiving process • Compare in-transit inventory to a store's on-hand inventory for items missed in the receiving process • Investigate transfer patterns to ensure inventory is in the correct location

YEARLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review cost or quantity changes by supplier created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (SUPPLIER)	Analyze By: Supplier Value Inventory At: Average Cost Report Type: Supplier Summary Sales Period: Year to Yesterday or Previous Year Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant supplier changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Review cost or quantity changes by class created via product receipts, sales, physical inventory, non-sellable and transfers	SALES ANALYSIS INVENTORY SUMMARY (CLASS)	Analyze By: Class Value Inventory At: Average Cost Report Type: Class Summary Sales Period: Year to Yesterday or Previous Year Class Depth Limit: Leave blank to analyze at the lowest class level Inventory Summary Options: At Cost or Quantity	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Identify significant class changes between beginning and ending inventory Compare non-sellable returns to credit memos and non-sellable packing lists Compare product receipts to invoices
Identify a store's year end inventory	STOCK STATUS (YEAR END INVENTORY)	In Order Of: Supplier Store Option: Separate Stores Which Items: All Items Value Date: Last Day of Previous Year or Today if today is the last day of the year	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand, Show Negative On Hand and Costs for Which Quantities	<ul style="list-style-type: none"> Report on-hand inventory totals to accountant Report on-hand inventory to appropriate tax agencies Verify on-hand accuracy
Identify SKUs with a limited size selection to markdown current inventory or combine inventory into a single store	STOCK STATUS (LIMITED SIZE SELECTION)	In Order Of: Supplier Store Option: Compare Stores in multi-store organization Which Items: Only Items with Less Than # Sizes On Hand Size Count: Enter 3 or a desired number	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand for Which Quantities and Costs for Also Print	<ul style="list-style-type: none"> Implement markdown inventory Combine inventory into fastest moving store
Identify SKUs with negative on-hands	STOCK STATUS (NEGATIVE ON HAND)	In Order Of: Supplier Store Option: Separate Stores Which Items: Only items with a negative on-hand quantity	Report Criteria: Leave blank to report on all stores, suppliers, classes or SKUs Printing Options: Select On Hand, Show Negative On-Hand, On-Order (At Once & Future) for Which Quantities	<ul style="list-style-type: none"> Isolate duplicate SKUs (e.g. SKUs created multiple times) Identify if UPCs are assigned to the incorrect product Identify items sold but still on-order
Review non-sellable inventory not yet returned to a supplier	NON-SELLABLE INVENTORY (SKUS BY SUPPLIER)	Report Type: SKU by Supplier Include Size Detail: Select Include Return Codes: Select Include items not on a batch: Select Include Items on an uncompleted batch: Select Class Depth Limit: Leave blank to analyze at the lowest class level	Report Criteria: Leave blank to report on all suppliers	<ul style="list-style-type: none"> Create and complete non-sellable batches to remove non-sellable inventory and receive a credit memo
Review in-transit inventory (Multi-Store Organization Only)	TRANSFER SUMMARY	Sales Period: Year to Yesterday or Prior Year Show Details: Sales"	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Compare in-transit inventory to a negative on-hand report for items missed in the receiving process Compare in-transit inventory to a store's on-hand inventory for items missed in the receiving process Investigate transfer patterns to ensure inventory is in the correct location

MONTHLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review promotion codes transacted on the RICS POS	PROMOTION ANALYSIS	Sales Period: Month to Yesterday or Previous Month Store Options: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores and promotion codes or enter a promotion code(s) in the By Promotion Code field	<ul style="list-style-type: none"> Evaluate Cost, Profit, and G.P.% for promotion to analyze effectiveness
Identify top purchasing customers by supplier	CUSTOMER MAILING LIST (SUPPLIERS)	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all customers Customer Filter By Purchase: Enter a supplier code(s) in the By Supplier field and use the Any Purchase dropdown menu to select a desired period	<ul style="list-style-type: none"> Create direct mailers for slow-moving suppliers Promote upcoming trunk events or supplier promotions Send customer appreciation coupon
Identify customers with an upcoming birthday	CUSTOMER MAILING LIST (BIRTHDAY)	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Enter a birth month or period in the corresponding field based on next month Customer Filter By Purchase: Leave blank to report on all customers	<ul style="list-style-type: none"> Send birthday coupon
Identify customers with an email address	EXPORT CUSTOMER EMAIL	In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Use the Only Include Accounts with Email dropdown menu to select YES Customer Filter By Purchase: Leave blank to report on all customers	<ul style="list-style-type: none"> Create email blast for slow-moving suppliers Promote upcoming trunk events or supplier promotions
Identify expiring frequent buyer rewards	FB EXPIRING REWARDS	Expires On: Use the Selected Dates option and enter the next month	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all plans	<ul style="list-style-type: none"> Send reward expiration reminders

QUARTERLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review promotion codes transacted on the RICS POS	PROMOTION ANALYSIS	Sales Period: Last # Months (3 or 4 Months) Store Options: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores and promotion codes or enter a promotion code(s) in the By Promotion Code field	<ul style="list-style-type: none"> Evaluate Cost, Profit, and G.P.% for promotion to analyze effectiveness
Identify top purchasing customers by supplier	CUSTOMER MAILING LIST (SUPPLIERS)	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all customers Customer Filter By Purchase: Enter a supplier code(s) in the By Supplier field and use the Any Purchase dropdown menu to select a desired period	<ul style="list-style-type: none"> Create direct mailers for slow-moving suppliers Promote upcoming trunk events or supplier promotions Send customer appreciation coupon
Identify customers who have not purchased within a store for a select period	CUSTOMER MAILING LIST (DORMANT CUSTOMERS)	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Use the Last Purchase dropdown menu to select Last # Months (3 or 4 Months) Customer Filter By Purchase: Leave blank to report on all customers	<ul style="list-style-type: none"> - Create direct mailer to drive dormant customers into the store - Promote upcoming trunk events or supplier promotions
Identify customers with an email address	EXPORT CUSTOMER EMAIL	In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Use the Only Include Accounts with Email dropdown menu to select YES Customer Filter By Purchase: Leave blank to report on all customers	<ul style="list-style-type: none"> Create email blast for slow-moving suppliers Promote upcoming trunk events or supplier promotions
Identify customers who have reward accumulation or rewards	FB CUSTOMER ACCUMULATION	Not Applicable	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all plans	<ul style="list-style-type: none"> Create email blast for slow-moving suppliers Promote upcoming trunk events or supplier promotions
Identify frequent buyer customers who earned a reward	FB REWARDS EARNED BY CUSTOMER	Sales Period: Last # Months (3 or 4 Months)	Not Applicable	<ul style="list-style-type: none"> Send reward reminder emails or direct mailers Promote upcoming trunk events or supplier promotions

YEARLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review promotion codes transacted on the RICS POS	PROMOTION ANALYSIS	Sales Period: Year to Yesterday or Previous Year Store Options: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores and promotion codes or enter a promotion code(s) in the By Promotion Code field	<ul style="list-style-type: none"> Evaluate Cost, Profit, and G.P.% for promotion to analyze effectiveness
Identify top purchasing customers by supplier	CUSTOMER MAILING LIST	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all customers Customer Filter By Purchase: Enter a supplier code(s) in the By Supplier field and use the Any Purchase dropdown menu to select a desired period	<ul style="list-style-type: none"> Create direct mailers for slow-moving suppliers Promote upcoming trunk events or supplier promotions Send customer appreciation coupon
Identify customers who have not purchased within a store for a select period	CUSTOMER MAILING LIST (DORMANT CUSTOMERS)	Report Type: List Report In Order of: Account Number Only Include first __ Customers: Leave blank for all customers who have purchased a selected supplier(s) or enter a desired number to display the top purchasing customers	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Use the Last Purchase dropdown menu to select Year to Yesterday or Previous Year Customer Filter By Purchase: Leave blank to report on all customers	<ul style="list-style-type: none"> Create direct mailer to drive dormant customers into the store Promote upcoming trunk events or supplier promotions
Identify customers who have reward accumulation or rewards	FB CUSTOMER ACCUMULATION	Not Applicable	Report Criteria: Leave blank to report on all customers Additional Customer Criteria: Leave blank to report on all plans	<ul style="list-style-type: none"> Create email blast for slow-moving suppliers Promote upcoming trunk events or supplier promotions
Identify frequent buyer customers who earned a reward	FB REWARDS EARNED BY CUSTOMER	Sales Period: Year to Yesterday or Previous Year	Not Applicable	<ul style="list-style-type: none"> Send reward reminder emails or direct mailers Promote upcoming trunk events or supplier promotions
Identify gift card liability	GIFT CARD BALANCE	Not Applicable	Not Applicable	<ul style="list-style-type: none"> Report liability to accountant Report liability to appropriate tax agencies

DAILY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review daily transactions	SALES JOURNAL (STORE)	Sales Period: Today or Yesterday Page Breaks After Batch: Select to insert a page break between each batch Sale Types: Select Store Sale and all necessary types	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Evaluate the breakdown of transactions
Review returns, refunds, and voided transactions	SALES JOURNAL (RETURN/REFUNDED/VOIDED TICKETS)	Sales Period: Today or Yesterday Page Breaks After Batch: Select to insert a page break between each batch Additional Sales Journal Options: Return Code Summary Limit Tickets: Tickets with Returns, Refunded Tickets, Voided Tickets Sale Types: Select Store Sale and all necessary types	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Verify returned product, prices and reasons Evaluate voided tickets
Review transactions with a discount(s) or coupon(s)	SALES JOURNAL (MARKDOWNS)	Sales Period: Today or Yesterday Page Breaks After Batch: Select to insert a page break between each batch Additional Sales Journal Options: Discount Summary and Coupon Summary Limit Tickets: Tickets with Unmatched Prices Sale Types: Select Store Sale and any other necessary types	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Verify discount reasons and markdown amounts Evaluate redeemed coupons
Identify daily store totals related to class, salesperson, tax, transaction, tender, and POS terminal(s)	POS SUMMARY	Sales Period: Today or Yesterday	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Verify POS terminal performance
Identify daily financial totals related to sales, tenders, gift cards and AR	STORE ANALYSIS	Sales Period: Today or Yesterday	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Verify sales, tenders, gift cards, and AR totals Enter daily financials into accounting software Compare tender deposits to bank financials
Review daily financial totals related to the store's assets, liabilities, revenue and expenses	GENERAL LEDGER SUMMARY	Sales Period: Today or Yesterday	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> Evaluate store assets, liabilities, revenue and expenses

WEEKLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review and compare salesperson performance for up to 4 sales periods	SALESPERSON ANALYSIS	Sales Period: Week to Yesterday or Previous Week Sales Period 2: Month to Yesterday Sales Period 3 (Optional): Last # Months (3 or 4 Months) Sales Period 4 (Optional): Year to Yesterday Count Tickets: Calculated Ticket Count Store Option: Combine Stores for multi-store organization	Report Criteria: Leave blank to report on all stores and users Accessories Options: Leave blank or use the By Class dropdown menu to display the percent of class sales to total sales Multiple Sales: Leave blank to report on all sales	<ul style="list-style-type: none"> • Create peer employee training programs • Create employee reward programs
Analyze salesperson sales by class	SALESPERSON SUMMARY (CLASS)	In Order Of: User Code Group By: Class Sales Period: Week to Yesterday or Previous Week Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and classes or use the By Class dropdown menu to select a class or classes	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze salesperson sales by supplier	SALESPERSON SUMMARY (SUPPLIER)	In Order Of: User Code Group By: Supplier Sales Period: Week to Yesterday or Previous Week Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and suppliers or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Review time clock records	TIME CLOCK	In Order Of: User Code Sales Period: Week to Yesterday or Previous Week Store Option: Combine Stores for multi-store organization	Report Criteria: Leave blank to report on all stores and users Printing Options: Select to display each time clock record	<ul style="list-style-type: none"> • Verify time clock entries against schedule • Process payroll
Analyze daily store totals	SALES BY DAY	Sales Period: Week to Yesterday or Previous Week Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Evaluate changes in net sales • Evaluate Tickets, Units Per Ticket (UPT) and Dollars Per Ticket (DPT)
Identify daily financial totals related to sales, tenders, gift cards and AR	STORE ANALYSIS	Sales Period: Today or Yesterday	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Verify sales, tenders, gift cards, and AR totals • Enter daily financials into accounting software • Compare tender deposits to bank financials

MONTHLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review and compare salesperson performance for up to 4 sales periods	SALESPERSON ANALYSIS	Sales Period: Month to Yesterday or Previous Month Sales Period 2: Last # Months (3 or 4 Months) Sales Period 3 (Optional): Year to Yesterday Sales Period 4 (Optional): Previous Year Count Tickets: Calculated Ticket Count Store Option: Combine Stores for multi-store organization	Report Criteria: Leave blank to report on all stores and users Accessories Options: Leave blank or use the By Class dropdown menu to display the percent of class sales to total sales Multiple Sales: Leave blank to report on all sales	<ul style="list-style-type: none"> • Create peer employee training programs • Create employee reward programs
Analyze salesperson sales by class	SALESPERSON SUMMARY (CLASS)	In Order Of: User Code Group By: Class Sales Period: Month to Yesterday or Previous Month Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and classes or use the By Class dropdown menu to select a class or classes	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze salesperson sales by supplier	SALESPERSON SUMMARY (SUPPLIER)	In Order Of: User Code Group By: Supplier Sales Period: Month to Yesterday or Previous Month Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and suppliers or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze daily store totals	SALES BY DAY	Sales Period: Month to Yesterday or Previous Month Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Evaluate changes in net sales • Evaluate Tickets, Units Per Ticket (UPT) and Dollars Per Ticket (DPT)
Identify peak selling times and days of the week	SALES BY TIME	Sales Period: Month to Yesterday or Previous Month Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Adjust staff schedule
Identify daily financial totals related to sales, tenders, gift cards and AR	STORE ANALYSIS	Sales Period: Month to Yesterday or Previous Month	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Verify sales, tenders, gift cards, and AR totals • Enter daily financials into accounting software • Compare tender deposits to bank financials
Identify untaxed sales	UNTAXED SALES	Sales Period: Month to Yesterday or Previous Month	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Verify customer tax exempt status • Verify ticket and SKU information”

QUARTERLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review and compare salesperson performance for up to 4 sales periods	SALESPERSON ANALYSIS	Sales Period: Last # Months (3 or 4 Months) Sales Period 2: Year to Yesterday Sales Period 3 (Optional): Previous Year Sales Period 4 (Optional): Selected Dates or leave blank Count Tickets: Calculated Ticket Count Store Option: Combine Stores for multi-store organization	Report Criteria: Leave blank to report on all stores and users Accessories Options: Leave blank or use the By Class dropdown menu to display the percent of class sales to total sales Multiple Sales: Leave blank to report on all sales	<ul style="list-style-type: none"> • Create peer employee training programs • Create employee reward programs
Analyze salesperson sales by class	SALESPERSON SUMMARY (CLASS)	In Order Of: User Code Group By: Class Sales Period: Last # Months (3 or 4 Months) Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and classes or use the By Class dropdown menu to select a class or classes	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze salesperson sales by supplier	SALESPERSON SUMMARY (SUPPLIER)	In Order Of: User Code Group By: Supplier Sales Period: Last # Months (3 or 4 Months) Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and suppliers or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze daily store totals	SALES BY DAY	Sales Period: Last # Months (3 or 4 Months) Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Evaluate changes in net sales • Evaluate Tickets, Units Per Ticket (UPT) and Dollars Per Ticket (DPT)
Identify peak selling times and days of the week	SALES BY TIME	Sales Period: Last # Months (3 or 4 Months) Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Adjust staff schedule
Identify collected sales tax	SALES TAX RECAP	Group By: Stores Sales Period: Last # Months (3 or 4 Months)	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • File Sales Tax return and remit Sales Tax collected
Identify daily financial totals related to sales, tenders, gift cards and AR	STORE ANALYSIS	Sales Period: Last # Months (3 or 4 Months)	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Verify sales, tenders, gift cards, and AR totals • Enter daily financials into accounting software • Compare tender deposits to bank financials

YEARLY

REPORT GOAL	REPORT NAME	REPORT OPTIONS	REPORT CRITERIA & SETTINGS	RICS RECOMMENDATION
Review and compare salesperson performance for up to 4 sales periods	SALESPERSON ANALYSIS	Sales Period: Year to Yesterday Sales Period 2: Previous Year Count Tickets: Calculated Ticket Count Store Option: Combine Stores for multi-store organization”	Report Criteria: Leave blank to report on all stores and users Accessories Options: Leave blank or use the By Class dropdown menu to display the percent of class sales to total sales Multiple Sales: Leave blank to report on all sales”	<ul style="list-style-type: none"> • Create peer employee training programs • Create employee reward program
Review salesperson sales by class	SALESPERSON SUMMARY (CLASS)	In Order Of: User Code Group By: Class Sales Period: Year to Yesterday or Previous Year Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and classes or use the By Class dropdown menu to select a class or classes	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze salesperson sales by supplier	SALESPERSON SUMMARY (SUPPLIER)	In Order Of: User Code Group By: Supplier Sales Period: Year to Yesterday or Previous Year Class Depth Limit: Leave blank to run at the lowest class level Included SKU Subtotals: Select to display SKUs sold Store Option: Combine Stores for multi-store organizations	Report Criteria: Leave blank to report on all stores, sales people and suppliers or enter a supplier code(s) in the By Supplier field	<ul style="list-style-type: none"> • Evaluate employee performance • Adjust training programs • Create employee reward programs
Analyze daily store totals	SALES BY DAY	Sales Period: Last # Year to Yesterday or Previous Year Compare Sales Period: Same Period Previous Yea	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Evaluate changes in net sales • Evaluate Tickets, Units Per Ticket (UPT) and Dollars Per Ticket (DPT)
Identify peak selling times and days of the week	SALES BY TIME	Sales Period: Year to Yesterday or Previous Year Compare Sales Period: Same Period Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Adjust staff schedule
Identify collected sales tax	SALES TAX RECAP	Group By: Stores Sales Period: Year to Yesterday or Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • File Sales Tax return and remit Sales Tax collected
Identify daily financial totals related to sales, tenders, gift cards and AR	STORE ANALYSIS	Sales Period: Year to Yesterday or Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Verify sales, tenders, gift cards, and AR totals • Enter daily financials into accounting software • Compare tender deposits to bank financials
Review daily financial totals related to the store's assets, liabilities, revenue and expenses	GENERAL LEDGER SUMMARY	Sales Period: Year to Yesterday or Previous Year	Report Criteria: Leave blank to report on all stores	<ul style="list-style-type: none"> • Evaluate store assets, liabilities, revenue and expenses

DASHBOARD

DASHBOARD POD1

GOAL	BUSINESS AREA	REPORT NAME	ORDER BY	PERIOD
Compare current store sales to the same period for the previous year	Sales	SALES SUMMARY COMPARISON	Store	Today

DASHBOARD POD2

GOAL	BUSINESS AREA	REPORT NAME	ORDER BY	PERIOD
Compare current store sales to the same period for the previous year	Sales	SALES SUMMARY COMPARISON	Store	Month To Date

DASHBOARD POD3

GOAL	BUSINESS AREA	REPORT NAME	ORDER BY	PERIOD
Analyze Store Performance i.e. Sales, # of Tickets, Avg Sales/Tkt, and Avg Items/Tkt	POS	STORE SALES	Not Applicable	Week To Date

DASHBOARD POD4

GOAL	BUSINESS AREA	REPORT NAME	ORDER BY	PERIOD
Analyze Salesperson Performance i.e. Hours, Sales, # of Tickets, Avg Sales/Tkt, and Avg Items/Tkt	Salesperson	SALESPERSON SALES	Not Applicable	Week To Date

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