Revenue Data

If your business tracks revenue by shift, you have the option of tracking this information directly on your schedule. To make this available, you must toggle the indicator on the **Schedule Settings** page under **Shift Settings**.

On the **Schedule** page, you can view and edit revenue data by selecting the **Show Revenue Data** checkbox in the middle of the page.

Schedule (j) Shift Notific	cations 0 Templates	Printed Files					
Feb 18 - Feb 24	> Day W	eek Month Empl	oyee View 🔻 🏹	Show Filter			Options Publish (1)
All 🚺 Open 🗿 Unpublis	hed 1 Display sche	duled employees only		Show Revenue Data	1		Ltd Total 6 h : 00 m \$0.0
							🛱 Create Report
Total Shifts 🕕 1	Filed Hours	6h:00m	Est. Cost	\$0.00	Forecast Revenue	\$1,500.00 Actual Rev	venue \$1,174.00
Scheduled Staff	0	0	1	0	0	0	0
Forecast Sales	\$500.00	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual Sales	\$356.00	\$568.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00
Wages vs Sales	0%	0%	0%	0%	0%	0%	0%
Q Search	SUN, FEB 18 0h:00m / \$0.00	MON, FEB 19 0h:00m / \$0.00	TUE, FEB 20 6h:00m / \$0.00	WED, FEB 21 0h:00m / \$0.00	THU, FEB 22 0h:00m / \$0.00	FRI, FEB 23 0h:00m / \$0.00	SAT, FEB 24 0h:00m / \$0.00

You may edit the individual amounts directly on the page by clicking into the table cell.

You may generate a report of your revenue by selecting the **Create Report** button on the right. This will open a modal window with your requested data.

Revenue Report				X
02/18/2024	02/24/2024 🛱			Options
Budget Values	02/18/2024	02/19/2024	02/20/2024	02/21/2024
Hours Scheduled	0.00	0.00	6.00	0.00
Hours Actual	0.00	0.00	0.00	0.00
Wages Scheduled	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Wages Actual	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Sales Forecasted	\$ 500.00	\$ 500.00	\$ 500.00	\$ 0.00
Sales Actual	\$ 356.00	\$ 568.00	\$ 250.00	\$ 0.00
Wages/Sales	0%	0%	0%	0%

Close

You may download a CSV copy of this report by selecting the **Options** dropdown and then choosing **Download**.

Revenue Report

02/18/2024 🖨 🕨	02/24/2024 🛱				Options 🔻
Budget Values	02/18/2024	02/19/2024	02/20/2024	02/21/2024	Download

 \times

Importing Revenue Data

If you store revenue data outside the system, you can import it directly into the schedule. To do so, from the **Options** dropdown, select **Import Revenue Data**.

	Options 🔻
_	+ Bulk Assign
_	🔟 Bulk Delete
	🕑 Bulk Update
	🕒 Bulk Copy & Paste
_	Schedule Settings
	Download Schedule
	2 Recalculate
	ピ Import Schedule
	ピ Import Revenue Data
+	🖬 Sync POS Data

On the next page, filter for the pay period you wish to track, and select **Download Template**.

< Back to Schedule	
Import Revenue Data	Import History
Upload a CSV file with the revenue information. Include a row for that day.	w for each day, and include actual & forecast sales data. Please note that any date imported will overwrite previous sales data
1. Download the template and fill in the necessary data	
■ 02/13/2024 - 02/20/2024	
Download Template	
2. Upload the completed templates	
	Drag and Drop file here or browse to begin upload
3. Import Data	
	Discard

This will download a CSV file including the following fields:

- Date
- Daily Forecast Sales
- Daily Actual Sales

Date	Daily Forecast Sales	Daily Actual Sales
2/13/2024		
2/14/2024		
2/15/2024		
2/16/2024		
2/17/2024		
2/18/2024		
2/19/2024		
2/20/2024		

Enter the dollar amounts for each column, save it as a CSV file, and either drag and drop it to the page, or select **browse** to upload the file.

2. Upload the completed templates	
import_schedule_revenue.csv	Reupload
3. Import Data	
	Discard

Select Import Data.

To see a log of your revenue imports, select **Import History** on the upper right.

K Back to Import Revenue Data					
Import History Log					
Import Name	Uploaded on	Status			
import_schedule_revenue.csv	02/20/2024	Completed			
Total Count: 1		< 1 >			