



BIG HAIRY DOG Feature of the Month

Tracking Lost Sales RP8

<https://www.youtube.com/watch?v=lc7d1Vg3ukQ>

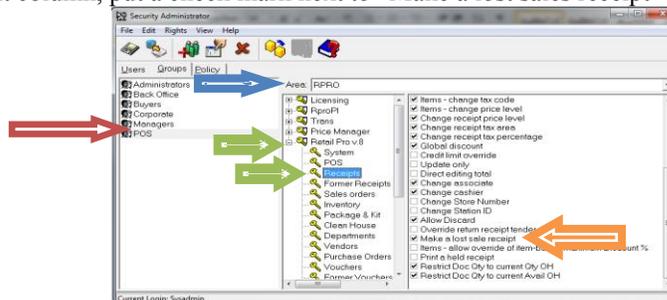
What is a Lost Sale? A lost sale is a potential sale that was lost. This most commonly occurs when a customer is looking for a particular size, but you are out of that size. This information can be helpful for the buyer to become more aware of your market.

There are a couple of things you will need to set up, if you decide to track lost sales.

- Make sure that “Receipt Type” is a field on your receipt screen as well.
- Go To TOOLS>SEC ADMIN>GROUPS.



- In the far left hand column, highlight the POS group (red arrow). In the area box choose RPRO (blue arrow). In the center column, click the plus next to Retail Pro v8 and highlight RECEIPTS (green arrow). In the far right column, put a check mark next to “Make a lost sales receipt” (orange arrow).



To ring up a Lost Sale, go into a new receipt like normal.



Everything is the same with a lost sale as in a regular sale with a couple of exceptions.

- Change the “Receipt Type” to Lost Sale
- When you go to the tender screen, it will automatically be tendered as cash. This amount WILL NOT be added to your cash totals during the X/Z Out.

Total:	60.23	
Tender: Cash	60.23	
Undefined	0.00	F11 = Update F12 = Print/Update

- Update as normal.

REPORTING ON LOST SALES

Now that you are tracking Lost Sales, you will need a report to analyze this new information. There is not a default report for this, so you will need to build this yourself.

1. Go to ANALYSIS>REPORTS>JOURNALS



2. Find the default “SALES: Receipt Journal”. Highlight this report and click on COPY.



3. A window will pop up to allow you to change the name of your new report. Once you have change the name, click OK.



4. Find and highlight your new report and click on EDIT.



5. The most important setting you will need to change is in OPTIONS.



6. Once in OPTIONS, go down to receipt types allowed. Click on the radius button at the end of the line to see your choices.



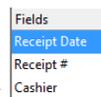
7. Uncheck Sales and returns, and put check mark next to Lost Sales.



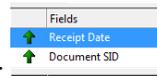
8. While on the OPTION window, you will also want to turn “Show Item Detail” to YES. This will allow you to see the items that you could’ve potentially sold.



9. We recommend that you take the time to clean up your Layout and Sort as well, although this is optional. Since all LOST Sales are given a receipt # of 0, you may find the report easier to read if you sort it by Receipt date first. It may also be helpful to put receipt date before receipt # in your layout as well.



Layout Example:



Sort Example:

10. Once you have made all of your changes, click on the SAVE button on top menu.

