

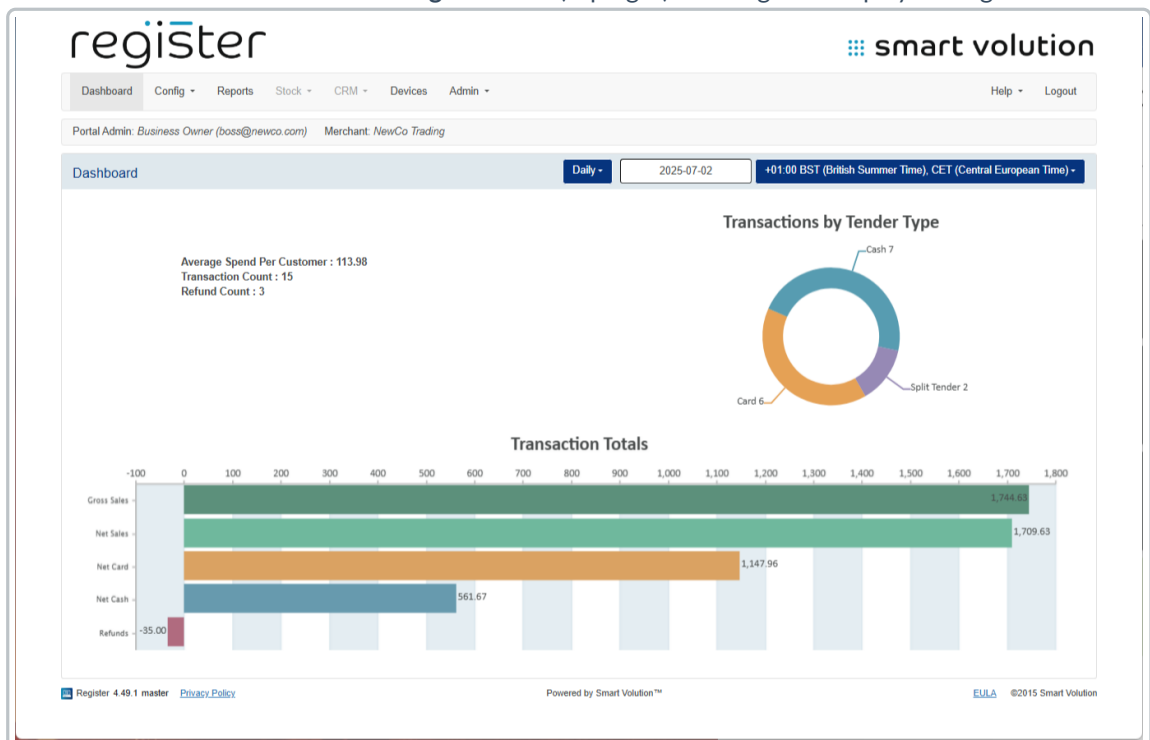
? How to access Reports on the Web Portal

Last Modified on 04/07/2025 4:30 pm BST

The **Web Portal Reports** screen provides detailed reporting for sales, refunds, and transactions.

? Steps to Access Reports Online:

1. **Login** to the **Web Portal** using the credentials provided by your **Solution Provider**
2. After login, the **Sales Dashboard** will be shown, displaying sales totals for all your devices for the current day
 - Use the **calendar control** and **date range selector** (top right) to change the displayed range



3. To view other reports:
 - Click **Reports** from the top navigation bar

register smart solution

Dashboard Config **Reports** Stock CRM Devices Admin Help Logout

Portal Admin: Business Owner (boss@newco.com) Merchant: NewCo Trading

Report Selector Report Selectors ^

Please select a report

Daily - 2025-07-04 +01:00 BST (British Summer Time), CET (Central -)

All Stores All Devices All Departments All Suppliers All Products

Run Report Save Update

Reports are currently limited to 10,000 rows of data and large reports may take some time to display.

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<https://preprod.smartolution.com/reports#reportsSelectorContainerPanel>

- Use the **Please select a report** dropdown to choose a report

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Dashboard Config **Reports** Stock CRM Devices Admin Help Logout

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Report Selector Report Selectors ^

Please select a report

- Operational
 - Pay Refund Report
 - Pay Transaction Report
 - Pay Transaction Summary Report
- Sales
 - Pay Sales Report
 - Pay Sales Summary Report
 - Pay Shift Report
 - Pay Staff Report

Daily - 2025-07-04 +01:00 BST (British Summer Time), CET (Central -)

All Stores All Devices All Departments All Suppliers All Products

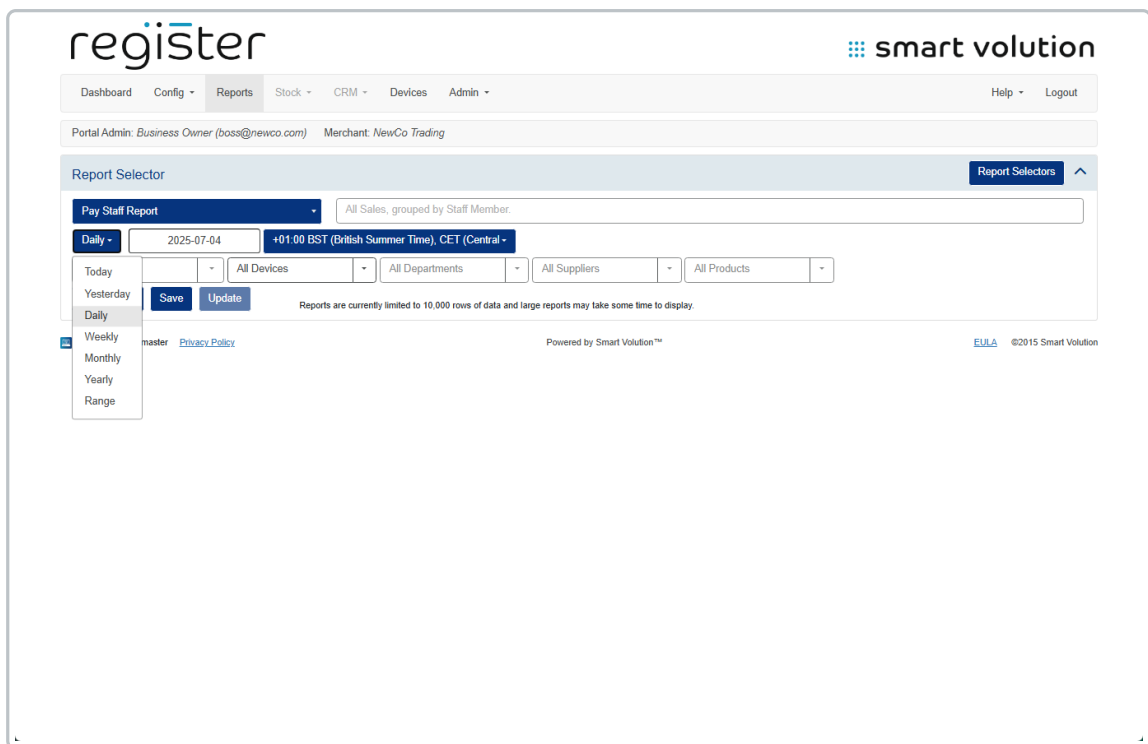
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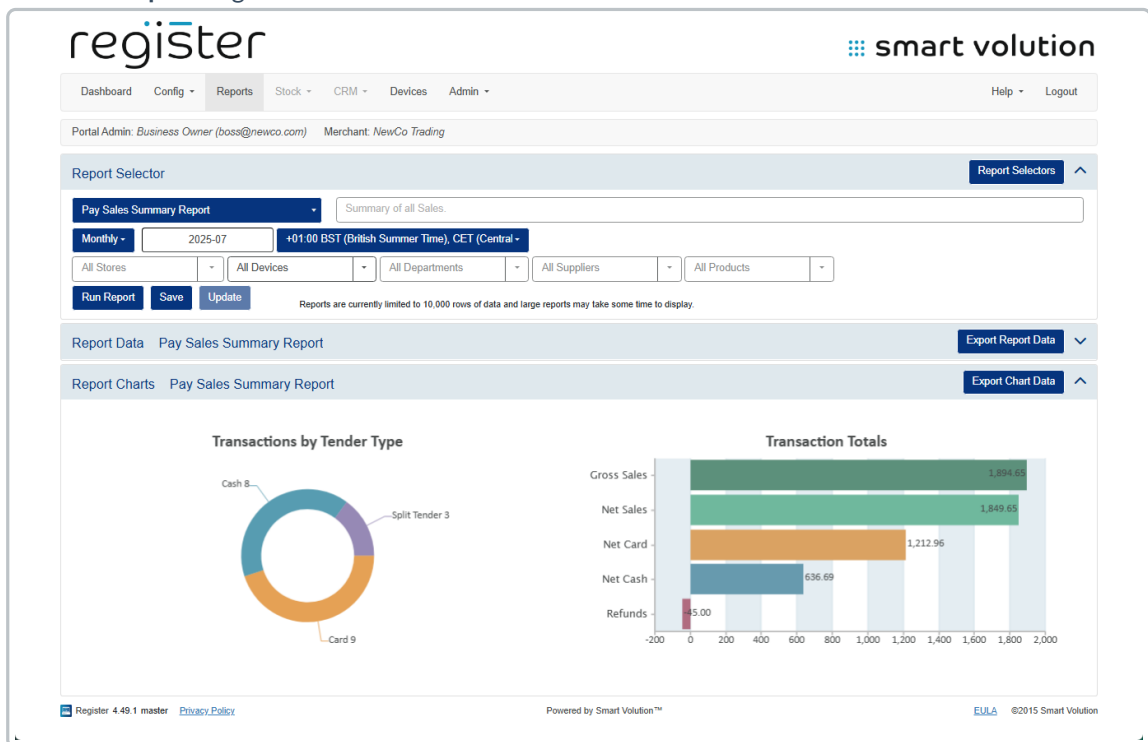
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- Adjust **date range** as needed using the **Daily** dropdown and **calendar** controls



- Click **Run Report** to generate it



? Types of Reports Available:

? Operational Reports

- **Pay Refund Report** – Lists all refunds performed
- **Pay Transaction Report** – Detailed transaction-level report (for support/analysis)
- **Pay Transaction Summary Report** – Summary view of all transactions (similar to Transaction History)

? Sales Reports

- **Pay Sales Report** – Daily sales totals per device
- **Pay Sales Summary Report** – Combined sales totals across all devices
- **Pay Shift Report** – Z Report / End of Day sales totals per device
- **Staff Sales Report** – Sales totals split by staff member

🔗 Report Tools & Exporting:

- Some reports include charts along with data tables
 - Click **Export Report Data** to download in Excel or CSV format
 - Click **Export Chart Data** to download the chart as a PDF
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i More Info:

- 🔗 [See this article: Explanation of all values in the available reports](#)
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