



Portal

Release Update v4.31.76– March 9, 2026

New + Improved

Updated - Sales by Customer by Items Report

We're excited to announce that we've revised this report to create more visibility and to make it easier to use. Below are improvements made to this report:

- Added total COGS
- Updated the filter by customer field, can search for customers more easily
- Added brand column
- Added avg cost column
- Rearranged the order of some columns to be closer to Sales by Item Report
- Renamed Discounts column to Customer Discounts
- Items are grouped by customer, so sorting will now sort items within the customer the items are grouped with (example: sorting by net sales column will now keep the items grouped with the same customer, then sort them by net sales)
- Item Name will now be driven off the item's current name instead of from the sales receipt. This means the same item may have different names over time but will show only one row with the current name.
 - Pack items are the exception, where they will be separated by pack

Report Criteria

Start: 02/27/2026 | End: 02/27/2026

Department: [Dropdown]

Filter by Customer: 1894 - Happy Customer (Alt ID: 1000) | Item ID: [Input]

Summary of Results

1	1	30	\$748.30	\$178.23	76.18 %
Days	Customers	Items	Net Sales	Cost of Goods	Margin

Results

Customer	Group	Item ID	Brand	Item Name	Department	# Sales	# Returns	# Units	Customer Discount	Net Sales	Margin	Avg Price	Avg Cost
Happy Customer	VIPs	00056454024	Beauty without Cruelty	Custom Description Fancy	HEALTH + BEAUTY	1	0	4.00	\$0.00	\$47.80	50.63 %	\$11.95	\$5.90
Happy Customer	VIPs	010594611100	MADE	POMEGRANATE LEMONADE ORGANIC	GROCERY	1	0	1.00	\$2.52	\$0.28	-542.86 %	\$0.28	\$1.80
Happy Customer	VIPs	022592007014	OZARKA	SPRING WATER		1	0	2.00	\$5.00	\$14.98	100.00 %	\$7.49	\$0.00
Happy Customer	VIPs	039978008817	Bobs Red Mill	Mix Pancake Waffle Buckwheat Organic	GROCERY	1	0	2.00	\$9.52	\$1.06	100.00 %	\$0.53	\$0.00
Happy Customer	VIPs	041271027747	StoK	Coffee Coldbrew Black Not2Sweet 6ct		1	0	1.00	\$0.00	\$6.95	100.00 %	\$6.95	\$0.00
Happy Customer	VIPs	042515435069	Lewis Labs	RDA FORMULA		1	0	1.00	\$0.00	\$30.99	100.00 %	\$30.99	\$0.00
Happy Customer	VIPs	042543008376	Woodstock Farms	Walnuts Halv Orgr		1	0	1.00	\$0.00	\$12.79	100.00 %	\$12.79	\$0.00
Happy Customer	VIPs	074306801593	Vibrant Health	Pet Digestive Greens	PET FOOD + PET SUPPLIES	1	0	1.00	\$0.00	\$32.00	100.00 %	\$32.00	\$0.00

Updated - Sales by Hour Report

We're excited to announce that we've revised this report to create more visibility and to make it easier to use. The start / end hour that is displayed for the day will be based on the hour the first sale occurs and the hour the last sale occurs. Then all hours in between will display, even if there are no sales for that hour. This makes it easier to conduct same hour over hour comparisons.

Updated – Inventory Receiving Report

We've revised the description of items within receiving documents to include the size & form.

Updated – Item Edit (Par Min/Max)

We've revised the par min/max fields to allow up to 2 decimal places and up to a quantity of 999 (up from 100).