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Appendix 2-B
Functional Reports

Toast reports are listed below by category. Each contains a link to a detailed view of the report. In addition, please refer to this online resource:
Getting Started with Analytics and Reports - a training tutorial
Reporting & Analytics Guide - a digital reports manual

To Filter the Reports

To change the date and time range:
1. From the date dropdown, choose the date range
    a. You can choose one of the preset values. To choose a specific start and end date, choose **Custom Date**
    b. From the time dropdown, choose a preset time range, To choose a specific start and end time, choose Custom Hours
2. From the employee dropdown, select the name of the employee that opened the order
3. To add other filters:
    a. Click **More**
    b. In the list of available fields, select the check box for each filter field to add, The new fields are added below the default filter fields.
        i.   For the added fields, select the filter values
    c. To update the results based on the new filter values, click **Update**

Sorting the Reports

By default:
● The **Orders** report is sorted in descending order by the opened date
● The **Menu Item Summary** in the **Order Details** report is sorted in descending order by the quantity ordered

To change the column used to sort the **Orders** report or the **Menu Item Summary**, click the column heading that you want to sort by. To reverse the sort order, click the column heading again

You cannot sort the order details panels in the **Order Details** report. The order details panels are always sorted in descending order by the opened date.

Sales Reports

[Sales Summary Report](#)
Day-to-Day top numbers for sales, payments, sales categories, cash, & more

[Sales Overview](#)
Historical sales trends and top numbers

[Sales Breakdown](#)
Comparison tool for exploring sales metrics

[Orders Report](#)
Displays all orders in an itemized list that occurred within the report range

[Paid in Total Orders](#)
All payments received for future orders

[Deposit Sales Collected](#)
Payments for orders outside of the currently selected date range

[Group Sales Overview](#)
Compare sales, orders, and guest totals across locations

Employee Performance

[Hourly Sales](#)
Net sales and labor cost in 15-minute increments

[Employee Productivity](#)
Compare performance with top metrics

[Labor Summary](#)
View hours worked, overtime, pay, and tips

[Manager Swipe Card Log](#)
All swipe card events

[Shifts Report](#)
Employee shifts, cash, and tips across locations

Pooled Tips
Track non-cash tips to distribute to reports employee-performance worked

Break Entries
Manage all employee break entries, including meal/rest break violations and missed breaks

Time Entries Audit
All employee time entries activity detail for auditing purposes

Menus

Product Mix
Day-to-day breakdown of menu items sold, including item tag filtering

Product Mix Compare
Compare sales for menu groups and items across locations

Menu Breakdown
Explore detailed sales metrics for menu items, modifiers, and special requests

Top Menu Items
View top performing menu items

Top Menu Groups
View top performing menu groups

Top Modifiers
View top performing modifiers

Item Details
Detailed view of all menu items sold

Modifier Details
Detailed view of all modifiers sold

Order Details
Menu items totals metrics and order details for all checks

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Out-of-stock menu items

Payments

Daily Credit Card Activity
Credit card fees, settlements, and bank account transfers

Deposits Total Overview
Settled and pending credit card deposit batches

House Accounts
View summary of house account details and totals

Settled Deposits Daily Breakdown
View settled batches of credit card deposits by location

Credit Card Statements
Download monthly processing statements

Gift Card Balances
All gift cards and their current balances

Gift Card Transactions
Real-time report of gift card usage

Gift Card Liabilities
Total Remaining liability for a restaurant group

Inactive Gift Cards
Unsold and inactive gift cards

Failed E-Gift Card Delivery
Unredeemed e-gift cards due to errant email addresses

Cash & Loss Management

Cash Activity Audit
All cash drawer activity over time for a selected location

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[Cash Drawer Overview](#)
A single day's cash activity for all locations

[Drawer History](#)
Cash activity for a single location and day

[Voided Orders](#)
All voided orders for a single location and day

[Removed Items](#)
All removed items for a single location and day

[No Sale](#)
All no-sale transactions for a single location and day

[Discounts](#)
All discounts applied to orders or items

[Unpaid Orders](#)
All orders with an unpaid balance

[Refunds](#)
All credit card refunds

[Voided Payments](#)
All voided credit card or cash payments

[Tax Exempt](#)
Orders entered as tax exempt

[Offline Payments](#)
Payments taken while devices are offline

[End of Day](#)
All payments for a selected day

Accounts

[Accounting Overview](#)
End-of-period financial reporting

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[Accounting by Day](#)
Export day-by-day accounting across locations

[Accounting by Location](#)
Export location accounting totals for a date range

Kitchen Operations

[Tickets by Fulfillment](#)
Compare ticket fulfillment rate by prep station

[Tickets by Hour](#)
Hourly net sales and ticket fulfillment time

[Ticket Details](#)
All ticket and fulfillment details, including time and location

Guest Engagement

[Guest Feedback](#)
All feedback from digital receipts

[Guest Summary](#)
Overview of gift cards, rewards accounts, and guest credits

[Guest Information](#)
Number of visits, time of day, sales totals and more for each guest

[Guest Credits](#)
Guests who have redeemable account credits

[Rewards Accounts](#) / [Rewards Transactions](#)
Balances for open rewards accounts / A report of rewards occurring throughout the day

Below is a list of Marriott Operational Reports and their Toast Equivalent

Name of Marriott Report	Name of Toast Equivalent
OPERATIONAL REPORTS	
Cover Count	Sales Summary Report
In-house vs. External Guest Report (by Cover)	Sales Summary Report
In-house vs. External Guest Report (by Revenue)	Sales Summary Report
Menu Item Sales (By: Serving period, outlet, server, date)	Menu Breakdown or Product Mix Report
Daily Ops	Sales Summary Report
86 Report	86 countdown report
Day Part Ops	Sales Summary Report
Employee Tender Totals	Sales Breakdown
Revenue Center Ops	Sales Summary Report
System Sales Summary	Sales Summary
Family Group Sales by Rev Center	Product Mix
Sales Mix / Daily Sales / Product Mix	Product Mix / Sales Summary / Menu Breakdown
Hourly Revenue	Hourly Sales Report
Service Charges	Sales Summary
Service Performance (Gross)	Employee Productivity
Service Performance (Net)	Employee Productivity
Taxes	Sales Summary
Tenders	Sales Summary
CC Transaction Detail	Orders
CC Transaction Refund Detail	Orders
Employee Activity	Employee Performance Report
Employee Exceptions	Sales Exceptions
Employee Item Sales	Sales Breakdown
Employee Productivity/Performance	Employee Performance Report
Employee Sales Summary	Sales Summary Filtered by Employee
Tip Track Summary/ Server Shift Sales Tips & Gratuities/ Gratuity & Service Charge Summary	Employee Performance Report (shift)

Tip Transfer Detail	Tip Manager
Cash Activity Audit	Cash Activity Audit
Cash Drawer Overview	Cash Drawer Overview
Combo Items Sales Summary	Menu Breakdown / Product Mix
Menu Engineering Summary	Menu Breakdown / Product Mix
Menu Engineering Detail	Menu Breakdown / Product Mix
Ordering Sales Mix	Menu Breakdown / Product Mix
Sales Mix Summary	Product Mix
Top Items Summary	Menu Breakdown
KDS Station Report	Kitchen Operations Report
Speed of Service Report	Sales Summary (turn time)
Receipts Report	Orders
Auto-fire Checks Report	Meal Pacing / Kitchen Report
Daily Checklist	Sales Summary
F&B Summary Report	Sales Summary
Check Tender Detail	Orders
Check Tender Reference Detail	Find Check Functionality
House Accounts	N/A - Handled through PMS
Gift Card Balances	N/A - Handled through GiveX
Gift Card Transactions	N/A - Handled through GiveX
Reopened Checks	**Not Currently Available**
Refunded Checks	Refunds Report
Voided Checks	Void Report under Sales Exceptions
Clock Activity	Time Entries
Clock Detail	Time Entries
Current Clock-In	Time Entries
Labor Summary	Labor Summary Report
Server Sales	Employee Performance Report
Coupon Detail	Discount Reports
Coupon Summary	Discount Reports
Discount Detail	Discount Reports
Discount Summary	Discount Reports

Gift Card Transaction Detail	Orders
Daily Tax Summary / VAT Sales Summary	Sales Summary
Tax Exempt Transactions	Tax Exempt Report
Entertainment Tax Summary	Payments Report
Posting Detail	Group Sales Overview
Posting Summary	Group Sales Overview
IRS Tips	Shift Report / Time Entries Report
Detailed Wine Bottle Sales by Day	Product Mix or Menu Breakdown
Item Transfer Report by Day, Associate, Outlet	**Not Currently Available**
FINANCE REPORTS	
Daily Sales / Accounting by Day	Accounting report
Accounting Overview	Accounting report
Audit by Discount	Discount Report?
Audit by Major Group	Sales Summary
Audit by Tender	Payment Breakdown Report
Employee Financial Control	Sales Summary Report
Adjustments	Removed Items Report
CC Batch Activity	**N/A - FreedomPay would own this**
CC Batch Report	**N/A - FreedomPay would own this**
Check Images: Discounts	Discounts Report
Check Images: Voids	Void Report
Closed Check by Tender	Payment Breakdown Report
Control Report	Sales Summary Report
Cost of Goods	Inventory Partner or Provider
Discounts	Discounts Report
MarrPay Daily Detail	**N/A - FreedomPay would own this**
MarrPay Daily Summary	**N/A - FreedomPay would own this**
Cashier Financial Report	Cash Activity / Cash Drawer Audit
Employee Financial Report	Shifts
Revenue Center Open Check Report	Orders
Serving Period Financial Report	Sales Summary filtered by service period
Menu Item Sales Revenue Center Detail Report	Product Mix

Major Group Sales Report	Menu Breakdown
Table Sales Report	Sales Summary filtered by service mode
Employee Closed Check Report	Orders Report
Employee Open Check Report	Orders Report
Revenue Center Closed Check Report	Orders Report
Revenue Center Open Check Report	Orders Report
Void Reason Report / Refund, Return, Void Detail	Void Report / Refund Report/ etc
Accounting Interface Report	Account by Day/Location
Active Users Report	**Not Currently Available**
CAL Package Report	**N/A - FreedomPay would own this**
MHGL Revenue Center Report	**N/A - Covered by MHGL work**
Reports for Roles	Employees Section of Toast Web
Custom Service Charge Report	Sales Summary/ Payments Report
Credit Card Exception Report	**N/A - FreedomPay would own this**
Posting Status Report	**N/A - FreedomPay would own this**
GA Account Activity Detail	Group Sales Overview
GA Account Activity Summary	Group Sales Overview
Paid in total orders	Paid in total orders
Deposit Sales Collected	Deposit Sales Collected
Group Sales Overview	Group Sales Overview
Manager Swipe Card Log	**Not Currently Available**
Gift Card Balances	**N/A - Handled through GiveX**
Gift Card Liabilities	**N/A - Handled through GiveX**
Inactive Gift Cards	**N/A - Handled through GiveX**
Tender/Payment type by Serving Period, Server, Revenue Center	Sales Summary
Transactions by CC/Tender Type	Sales Summary
F&B Cost per Occupied Room	**Not Currently Available**
Capture Rate Percentage for Breakfast	Sales Summary Report
Sales per Man-Hour and Labor Dollar	Labor Summary Report
Banquet Food Sales Per Occupied Room	Sales Summary Report
Sales Breakdown Per Occupied Room by Meal Period, Category	Sales Summary Report
Membership Fees (Detail + Total)	Payments Report

Membership Revenue (Detail + Total)	Payments Report
Membership Discounts (Detail + Total)	Payments Report
ABOVE PROPERTY OPERATIONAL REPORTS	
Pricing Averages	Menu Breakdown / Product Mix
Store List Report	Group Sales Overview / Locations Breakdown
Location Information Report	**Not Currently Available**
Last Posting Report	**N/A - FreedomPay would own this**
Store List	Group Sales Overview / Locations Breakdown
Tender Total by Property Report	Sales Summary
Workstation Version Report	Device Report
Menu Item Sales by MARSHA	Menu Breakdown / Product Mix
Standard Extract for MDP	**Not Currently Available**
ABOVE PROPERTY FINANCE REPORTS	
KPIs by Date	Sales Summary
KPIs by Store / Accounting by Location	Sales Summary
Location Comparison	Location Breakdown Report
Time Comparison	Sales Summary / Group Sales Overview
Revenue Center Tax Report	Sales Summary
Tender Total by Property Report	Sales Summary
Accounting Interface Report	**Not Currently Available**
MHGL Account Summary Report	**Not Currently Available**
Enterprise Sales Report	Sales Summary