



CStoreOffice® Reports

For Petrosoft Customers

Version 2

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Petrosoft LLC
290 Bilmar Drive, Pittsburgh, PA 15205
www.petrosoftinc.com

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REPORTS

Petrosoft provides a huge number of analytical reports that allows you to monitor your sales data across all business activities.

All reports in CStoreOffice® can be conventionally divided into the following two groups:

- **General reports** which are grouped in the **Reports** menu by the following areas:
 - Fuel
 - Store
 - Accounting
 - Payroll
 - H.R.
 - Price Book
 - Lottery
 - Loyalty

The screenshot shows the CStoreOffice® interface. The top navigation bar includes 'DOCS & FILES', 'DATA ENTRY', 'INVENTORY', 'PRICE BOOK', 'CUSTOMERS', 'VENDORS', 'TRANSACTIONS', and 'REPORTS'. The 'REPORTS' menu is open, showing a list of report categories: Fuel, Store, Accounting, Payroll, H.R., Price Book, Lottery, and Favorites. Below the menu, the dashboard displays several report sections: 'Cash Register' with a 'Shift Reports' table, 'Tasks' (No Today Tasks), 'News' (with dates and titles), 'Cash Register Rates', 'Key Performance Indicators', 'Lottery Indicators', and 'Vendor Counters'. The 'Shift Reports' table lists various locations and their counts.

Location	Count
Cochran	5
SmartPOS 400	0
Bilmar Building	0
Greentree Office Building	0
TS1-SPOS	0
400_Demo	0
DC 401 NAS	3
SPOS 825-cert	23
CENTRE SUNOCO	0
BANKSVILLE SUNOCO	0
NEGLEY SUNOCO	0
SCOTTDALE SUNOCO	0
LEECHBURG SUNOCO	0
CRAFT SUNOCO	0
UNIONTOWN SUNOCO	0
Aramingo Sunoco	0
New Castle Sunoco	0




An access to this group of reports is level-based. For more information about report levels, see [Viewing Reports](#). To check the levels on which each report is available, click the corresponding report group listed above.

- **Additional reports** which are available from other CStoreOffice® menus and forms. For more information about additional reports, see [Other Reports](#), [Shift Reports](#).

To learn how to generate a report and interpret its data, click this report name in the relevant help section.

To get the information about general operations you can perform with all reports, see [Working with Reports](#).

 If you have not found the information you need, have any issues with the reports, or the report you need to learn about is not described yet, contact Petrosoft Support team.

Working with Reports

You can perform the following operations with general CStoreOffice® reports:


VIEWING REPORTS

To view the reports list, from the CStoreOffice® home page, go to **Reports** and then click the group of reports you are interested in.

Each reports group displays the list of report in accordance with the selected level. You can view the reports of the selected reports group at the following 4 levels:

- **Account Level:** Displays the reports for the whole account.

- **Division Level:** Displays the reports for the selected division.

 In case the divisions are not set up for you account, the Division level is not available for the reports. For more information on managing divisions in CStoreOffice®, see [Divisions](#).

- **Company Level:** Displays the reports for the selected company.

The list of Store reports is displayed for the Greyhound company.

To display the reports list at the company level:
a. Select By Company.
b. Click the company.

 For more information on managing companies in CStoreOffice®, see [Companies](#).

- **Location (Station) Level:** Displays the reports for the selected location (station).

The list of Store reports is displayed for the Test Cloud Storage 1 station.


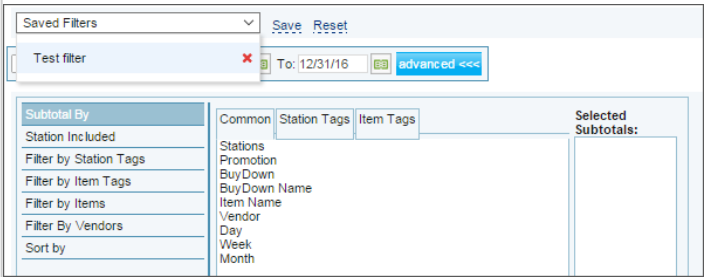
To display the reports list at the station level:
a. Select by Division or By Company.
b. Click the division or the company you need.
c. Click the station you need.

To open the reports at any of the listed above levels:

- **Account level:** Click **ACCOUNT**
- **Division level:**
 - Select **by Division**.
 - Click the division name you need.
- **Company level:**
 - Select **By Company**.
 - Click the company you need.
- **Location (Station) level:**
 - Select **by Division** or **By Company**.
 - Click the division or company you need correspondingly.
 - Click the station you need.

SAVING REPORT FILTERS

With this feature you can save your time and effort by saving the filters you usually apply to the specific report to have a quick access to them afterwards.

To...	Action...
To create a new filter,	<p>select the filtering options and click Refresh > click Save > enter the filter name > click the icon for saving .</p> <p>To cancel saving, click the corresponding icon.</p> 
To delete a filter,	<p>from the Saved Filters list, select the filter and click the delete icon for it.</p> 
To apply a filter to the report,	select the filter from the Saved Filters list.
To clear the filtering settings and exit the filtering mode,	click Reset .

ADDITIONAL REPORT ACTIONS

To...	Action...
To reload the form,	click Refresh .
To print the report,	click Print Version .
To have the report emailed to you,	click Send to Email .
To view the report in the PDF version,	click PDF .
To view the report in the Excel version,	click Convert to Excel .
To open the Petrosoft University Portal,	click Help .
To expand all the report data,	click Expand All .
To hide the expanded report data,	click Collapse All .
To create a ticket,	click Feedback .
To save the report to favorites,	click the favorites icon next to the reports name. For more details, see Favorite reports .

Fuel Reports

To open the list of Fuel reports, click **Reports > Fuel**.

To check the levels on which the fuel reports are available, use the table below.

Fuel Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Competitor Gas Prices	+	+	+	+
Competitors History	-	-	-	+
Consolidated Fuel Inventory	+	+	+	+
Daily Fuel Inventory	+	+	+	+
Daily Sales Comparison	+	+	+	+
Extended SIR Export	+	+	+	+
Fuel BOLs	+	+	+	+
Fuel Margins	-	-	-	+
Fuel Margins Consolidated	+	+	+	+
Fuel Monitoring	+	+	+	+
Fuel Prices Change History	+	+	+	+
Fuel Products Purchases	+	+	+	+
Fuel Product SIR	-	-	-	+
Fuel Projection	+	+	+	+
Fuel Purchases Detailed	+	+	+	+
Fuel Rebate	+	+	+	+
Fuel Sales Comparison	+	+	+	+
Fuel Sales Detailed	-	-	-	+
Gas Sales Comparison	-	-	-	+
Gasoline Inventory by Station	+	+	+	+
Gasoline Prices Management	+	+	+	+
Gasoline Sales Detailed by Positions	-	-	-	+
Gasoline Sales History	-	-	-	+
Kerosene / Diesel Sales	-	-	-	+
Order Gasoline	-	-	-	+
Rebate Counter	+	+	+	+
Sales History	+	+	+	+
SIR Export	-	-	-	+
SIR for All Products	-	-	-	+

Fuel Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
State Tax	+	+	-	+
Todays Gas Orders	+	+	+	+
Verifone Loyalty	-	-	-	+
Wholesale / Rack Price Statistics	+	+	+	+

Store Reports

To open the list of store reports, click **Reports > Store**.

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To work with store reports, the user must have the **Display Store tab at Reports page** permission. For details, see [Permissions for Reports](#).

To check the levels on which the store reports are available, use the table below.


Store Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
6 Weeks Sales Analysis	+	+	+	+
Advanced Item Reconciliation	+	+	+	+
Buydowns	+	+	+	+
Cash Register Journal	+	+	+	+
Category Inventory Levels	-	-	-	+
Category Sales	+	+	+	+
COGS by Category	-	-	-	+
Company GPM	+	+	+	+
Company Inventory	+	+	+	+
Company Losses	+	+	+	+
Consolidated Category Inventory Short	+	+	+	+
Consolidated Inventory Short / Over	+	+	+	+
Consolidated Item Group Reconciliation	+	+	+	+
Consolidated Store Inventory Progress	+	+	+	+
Consolidated Tax Sales	+	+	+	+
Custom Income Item Sales	+	+	+	+
Custom Income Sales	-	-	-	+
DC Connection Monitoring	+	+	+	+

Store Report Name	Report Level			
	Account	Division	Company	Location
	Level	Level	Level	Level
Department Meters	+	+	+	+
Department Sales	-	-	-	+
Departments Taxes History	+	+	+	+
Distributor's Malt Beverage	-	-	-	+
Find and Replace in Store Purchases	+	+	+	+
GPM Comparison by Station	+	+	+	+
GPM Explanation	-	-	-	+
GPM for Low Volume Stores	+	+	+	+
Inventory Adjustment History	-	-	-	+
Inventory Audit	-	-	-	+
Inventory Progress	+	+	+	+
Inventory Shortage by Category / Department	-	-	-	+
Inventory Transfer	-	-	-	+
Inventory Transfer New	+	+	+	+
Inventory Volume by Category	+	+	+	-
Invoice GPM Range	+	+	+	+
Invoices	-	-	-	+
Item Groups Shortage	-	-	-	+
Item Purchases by Tags	+	+	+	+
Item Sales by Tags	+	+	+	+
Item Sales Comparison	+	+	+	+
Item Shortage	+	+	+	+
Itemized Inventory	-	-	-	+
Itemized Inventory by Tags	+	+	+	+
Itemized Refunds	+	+	+	+
Items Purchases	+	+	+	+
Loss Prevention	+	+	+	+
Merchandise Orders	-	-	-	+
Miscellaneous Summary	-	-	-	+
Money Order Sales	+	+	+	+
Monthly Sales Projections	+	+	+	+
Net Price Change	+	+	+	+
Out of Stock Items	-	-	-	+
Overstock Items	-	-	-	+

Store Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Parent-Child Exceptions	+	+	+	+
Pending Invoices	-	-	-	+
Pending Invoices Consolidated	+	+	+	+
Physical Inventories Results by Category	-	-	-	+
Price Change by Tags	+	+	+	+
Profit Contribution	+	+	+	+
Promotions by Tag	+	+	+	+
Purchases / Not Sold	+	+	+	+
Sales and Profit Comparison	+	+	+	+
Scanning	+	+	+	+
Shift Statistic	+	+	+	+
Sold / Not Purchased	+	+	+	+
Station Performance	-	-	-	+
Stock Movement	+	+	+	+
Store GPM	+	+	+	+
Store Inventory	-	-	-	+
Store Inventory Levels	+	+	+	+
Store Projection	+	+	+	+
Store Purchases	+	+	+	+
Store Purchases Comparison	+	+	+	+
Store Sales Detailed	-	-	-	+
Store Sales History	-	-	-	+
Total Book Inventory	+	+	+	+
Transactions	-	-	-	+
Usage Statistics	+	+	+	+
Vendor Counter	+	+	+	+
Vendors Shortages	-	-	-	+
Write-Offs by Tags	+	+	+	+

Accounting Reports

To open the list of Accounting reports, click **Reports > Accounting**.

 To work with accounting reports, the user must have the **Display Accounting tab at Reports page** permission. For details, see [Permissions for Reports](#).

To check the levels on which the accounting reports are available, use the table below.

Accounting Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Account Payable	-	-	-	+
Accounting Profit and Loss	-	-	+	+
Accounts Payable Open Bills	+	+	+	+
Accounts Receivable Aging Summary	-	-	+	-
Accounts Receivable Open Invoices	+	+	+	+
Actual Sales Tax Consolidated	+	+	+	+
Aim Export	+	+	+	+
Balance Sheet	-	-	+	-
Calculated Sales Tax Consolidated	+	+	+	+
Card Type Product Report	+	+	+	+
Cash Reconciliation	-	-	-	+
Cash Reconciliation Consolidated	+	+	+	+
Circle K Export	+	+	+	+
Consignment Export	+	+	+	+
Consolidated Daily Deposit	+	+	+	+
Consolidated Expenses	+	+	+	+
Consolidated Income	+	+	+	+
CR Credit Card Batches	+	+	+	+
Credit Card Details	+	+	+	+
Customer Balance Detailed	-	-	+	-
Customer Balance Summary	-	-	+	-
Customer Invoices	+	+	+	+
Customer Invoices Detailed	+	+	+	+
Daily Night Report	+	+	+	+
Daily Sales	+	+	+	+
Daily Sales Comparison Tracker	+	+	+	+

Accounting Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Daily Sales Summary for Accounts Group	+	+	+	+
Daily Sales Summary	+	+	+	+
Data Export	+	+	+	+
Deposit Report	+	+	+	+
Dillners Export	+	+	+	+
DUFFY Export	-	-	-	+
Expenses	+	+	+	+
Expenses by Tags	+	+	+	+
Expenses Maintenance	+	+	+	+
Expenses to Accounting	-	-	-	+
FIS Departments List Export	+	+	+	+
FIS Items List Export	+	+	+	+
Food Stamps Summary	+	+	+	+
Fuel Taxes	+	+	+	+
General Journal	-	-	+	-
House Accounts	+	+	+	+
Intercompany Transfers	+	+	+	+
Inventory Variation	-	-	-	+
Item Sales Data Export	+	+	+	+
Liquor Transaction Export	+	+	+	+
Local Tax Calculator	+	+	+	+
Mas90 Export	+	+	+	+
Merchandise Loyalty	+	+	+	+
Monthly Performance	+	+	+	+
MOPs Summary	+	+	+	+
MOP Sales Consolidated	+	+	+	+
MS Dynamics Export	+	+	+	+
New Concepts Export	+	+	+	+
NRGT	-	-	-	+
Oasis Export Manager	+	+	+	+
Operating Profit Estimates (Profit & Loss)	+	+	+	+
Pass Through Credits Statements	+	+	+	+
Passport PDF Export	+	+	+	+
Payment Monitoring	+	+	+	+

Accounting Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Performance Score Card	+	+	+	+
Petrogas Glantus Export	+	+	+	+
Printed Checks Archive	+	+	+	+
Projections	+	+	+	+
Purchases export to IBM IS400	+	+	+	+
QB Synchronization History	+	-	+	+
QB Synchronization Manager	+	+	+	+
Reconcile Deposits	+	+	+	+
Royalty Calculator	-	-	-	+
Sales Summary	+	+	+	+
Sales Tax Coupon	-	-	-	+
Satellite Export	+	+	+	+
Satellite Export Extended	+	+	+	+
Shift Changes History	-	-	-	+
Statement of Cash Flow	+	-	+	+
Tobacco Scan Data supporting PMUSA	+	+	+	+
Tobacco Scan Data supporting RJR	+	+	+	+
Trial Balance	-	-	+	+
Vendor Balance Detailed	-	-	+	-
Vendor Balance Summary	-	-	+	-
Weekly Sales	+	+	+	+

Payroll Reports

To open the list of Payroll reports, click **Reports > Payroll**.

To check the levels on which the payroll reports are available, use the table below.

Payroll Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Labor Analysis	-	-	-	+
Payroll	+	+	+	+
Payroll Graphic	+	+	+	+
Payroll Total	+	+	+	+

H.R. Reports

To open the list of H.R. reports, click **Reports > H.R.**.

To check the levels on which the H.R. reports are available, use the table below.

H.R. Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Employee Activities Audit	-	-	-	+
Employment History	+	+	+	+
Forms Signed	+	+	+	+
Personal Information	+	+	+	+
Security Clearance	+	+	+	+
Tax Information	+	+	+	+

Price Book Reports

To open the list of Price Book reports, click **Reports > Price Book**.

To check the levels on which the price book reports are available, use the table below.

Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Baseline Cost Variations	+	+	+	+
Baseline Retail Variations	+	+	+	+
Best Sellers	+	+	+	+
Best Sellers by Tags	+	+	+	+
Cash Register Updates Manager	-	-	-	+
Consolidated Cost Changes History	+	+	+	+
Consolidated Retail Changes History	+	+	+	+
Cost Comparison	+	+	+	+
Cost Comparison by Station	+	+	+	+
Cost Exceptions	+	+	+	+
CRV Items Log	+	+	+	+
Dead Items	+	-	+	-
Find & Replace	+	+	+	+
Future Price Change	+	+	+	+
Item Checker	+	+	+	+


Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Items Maintenance Tool	+	+	+	+
Item Movement	+	+	+	+
Item Tags	+	+	+	+
Items Cleanup	+	+	+	+
List of Categories	+	+	+	+
List of Departments	-	-	-	+
List of Promo Groups	-	-	-	+
List of Promotions	+	+	+	+
New Items Manager	+	+	+	+
PLU List	+	+	+	+
Postpone Cost Change	+	+	+	+
Postpone Price Group Retail Changes History	+	+	+	+
Postpone Retail Change	+	+	+	+
Price Groups Management	+	+	+	+
Price List	+	+	+	+
Promotions	+	+	+	+
Promotions Acceptance	-	-	-	+
Promotions by Tag	+	+	+	+
Report Problem Items	+	+	+	+
Retail Reduction	-	-	-	+
Site Reference Data	+	+	+	+
Upcoming Delisted Items Report in PIM	+	-	-	-
Vendor Items Movement	-	-	-	+

Lottery Reports

This section describes the specifics of accessing and interpreting the lottery reports in CStoreOffice®.

For information on working with lottery, see [Lottery](#).

To open the list of Lottery reports, click **Reports > Lottery**.



To be able to work with lottery reports, the user must have the **Display Lottery tab at Reports page** permission. For details, see [Permissions for Reports](#).

To check the levels on which the lottery reports are available, use the table below.

Lottery Report Name	Report Level			
	Account Level	Division Level	Company Level	Location Level
Games List	-	-	-	+
Instant Ticket Sales and Inventory	-	-	-	+
Instant Lottery Tickets Shortages	-	-	-	+
Lottery Count Changes History	-	-	-	+
Lottery Inventory Changes History	-	-	-	+
Lottery Sales Comparison	+	+	+	+
Lottery Sales History	-	-	-	+
Lottery Sales Increase	+	+	+	+
Lottery Sales	+	+	+	+
Lottery Ticket Sales	+	+	+	+
Lottery Tickets Inventory by Serial Numbers	-	-	-	+
Lottery Tickets Purchases	-	-	-	+
Online Lottery Sales Audit History	-	-	-	+
Online Lottery Sales Audit	-	-	-	+