How Does Clerk Sales Tracking Work in RetailEdge?

POS Operations · https://retailedge.com/docs/how-does-clerk-sales-tracking-work-in-retailedge

Clerk tracking can be a great way to easily oversee commission, security, and overall sales of each individual clerk you have in your store.

When you ring in a sale and have clerk tracking turned on:

The person ringing in the sale and who has their clerk ID entered will be associated with the Sale and the Sale Items by default. You can see this by opening up a Sales Manager and viewing a previous sale.
When running clerk based sales reports for commissions, etc. RetailEdge will key off of the Sales Items and not the Sale.

You can change the clerk associated with a sale item during the sale by clicking on and editing the item and changing the clerk ID associated with the item(s).

You can change the clerk associated with a sale item after the sale by opening the Sales Manager and right clicking the line item and selecting Change Clerk.

When running clerk based sales reports for commissions, etc. RetailEdge will key off of the Sales items and not the Sale. This is done this way so when you have multiple sales people working on various items on a sale, that you can associate them with the particular items they should be receiving commission on. The Clerk who is associated with the Sale (vs. the items) will be the person who rang in the sale and can’t be changed.

You can simply ring in the sale as a different ClerkID each time if you are trying to associate all items on a sale with a different clerk and don’t want to have to go back retroactively and change them. But then you lose the ability to know who rang in the Sale. This can be an issue where you have multiple clerks ringing in sales and you see an anomalies (lots of voids, no sales, etc.). If you have one clerk ringing in sales during the “shift” then that is not as much of a problem.

Now What?

Now you have a way to track who is doing what when (security) and can also incentive your employees. Here are a few clerk based reports you might find useful:

Clerk Sales Commission
Sales By Clerk
Sales Performance By Date (filtered by Clerk ID)
Discount Summary Grouped by Clerk Only
Sales by Category Grouped by Clerk Only

Thanks for reading!