

Custom Tender Detail Report

Introduction

The **Custom Tender Detail Report** allows you to do exactly that, generate a **customized Tender Detail** report that displays transactions matching your selected payment types. Using the **Payment Types** drop-down, you can select **up to 7 payment types** to include in this report.

Running the Custom Tender Detail Report

To run the **Custom Tender Detail Report**:

1. Navigate to **Reports > Activity > Tender Detail > Custom**. The **Tender Detail Report – Custom** window will open.
2. Click the **Payment Types** drop-down to select up to **7 payment types** to include in your report.
3. Enter any other criteria as desired and click **OK** to generate your report.

Transactions will **only** be shown in the **Custom Tender Detail Report** if they match **one or more** of your selected payment types. If a transaction was paid using multiple payment methods and one or more match your selections, it will be included, and any payment methods that did **not** match your selections will be lumped together in the **Other** column.

For example, the report below was run for payment methods: AMEX, DEBIT, Discover Card, JCB Credit Card, Mastercard, Visa, and Rewards. This transaction was paid using a combination of AMEX, Visa, Mastercard, Rewards, Cash, and Check. Because Cash and Check were not selected, they do not appear as separate columns and instead get lumped together under **Other**.

Tender Detail Report - Custom

Sale #	Date	Customer	Total Tender	AMEX	DEBIT	Discover Card	JCB Credit Card	MasterCard	Visa	Rewards	Other
001-00411	3/28/2024	Mastri, Frank	21,250.00	5,000.00				2,418.15	5,000.00	331.85	8,500.00
Grand Totals			1	21,250.00	5,000.00			2,418.15	5,000.00	331.85	8,500.00

Payment Types: AMEX, DEBIT, Discover

ID	Type
<input type="checkbox"/>	Personal Check
<input type="checkbox"/>	Third Party
<input type="checkbox"/>	Traveler's Check
<input checked="" type="checkbox"/>	AMEX
<input checked="" type="checkbox"/>	DEBIT
<input checked="" type="checkbox"/>	Discover Card
<input checked="" type="checkbox"/>	JCB Credit Card
<input checked="" type="checkbox"/>	MasterCard
<input type="checkbox"/>	The Dom Card
<input checked="" type="checkbox"/>	Visa
<input type="checkbox"/>	Wire Transfer
<input type="checkbox"/>	Credit Memo
<input type="checkbox"/>	Gift Certificate
<input checked="" type="checkbox"/>	Rewards
<input type="checkbox"/>	Store Charge (House Account)
<input type="checkbox"/>	Tender Card

EDGE Tech Shop
3 Corporate Dr
Shelton, CT 06484
(877) 844-0992

Sold To: #001-00142
Frank Mastri
(203) 564-1234

150-1000001 Lady's White 18 Karat Satin Large Hoop Earrings With 2-1.50Tw Heart I-3 Emeralds

RECEIPT #001-00411
3/28/2024 10:44 AM
You were assisted by Jenny Sales (81)

Rewards Program Card #990500100153
Balance before this transaction... \$331.85
This transaction... (\$331.85) (\$331.85)
Balance after this transaction... \$0.00

Total... \$20,918.15

AMEX #9524... \$5,000.00
AU TH# :548941
Cash Tendered... \$1,000.00
Check #446 Tendered... \$7,500.00
Visa #6451... \$5,000.00
AU TH# :6112
MasterCard #4112... \$2,418.15
AU TH# :213411

Other is the total of all non-selected Payment Types



NOTE

The order in which payment methods appear in the **Payment Types drop-down** menu dictates the column order on the report. You **can** drag and drop the columns to **rearrange** them as you wish.

Columns on the **Custom Tender Detail Report** include:

Sale #	The ID for the transaction in which the sale took place
Date	The date of the sale
Customer	The customer's ID and name
Total Tender	The total sale
Cash	The amount of the sale in cash
Checks	The amount of the sale in checks
Credit Card Type (Visa, MC, Amex, Disc, etc)	The amount of the sale charged to a specific credit card type, organized under individual columns named for each selected credit card type. Note: These are example column names. Your columns may show different names, as they are determined by what credit card types you have saved.
Gift Certificate/Tender Cards	The amount of the sale charged to a gift certificate and/or tender card, organized under individual columns named for each selected tender type.
Other	The total sale of all non-selected Payment Types