Daily Target

- Daily Sale & Profit Tracking
- 1. Set Up Daily Target
  - How to set up Daily Target
  - How to add monthly operating expenses
  - How to choose profit and business days
- 2. Understand Daily Performance
  - How to read the red, yellow, and green status
  - How to review Profit Breakdown
- 3. Display and Alerts
  - How to choose Compact or Full Daily Target view
  - How to receive Daily Target alerts

Daily Sale & Profit Tracking

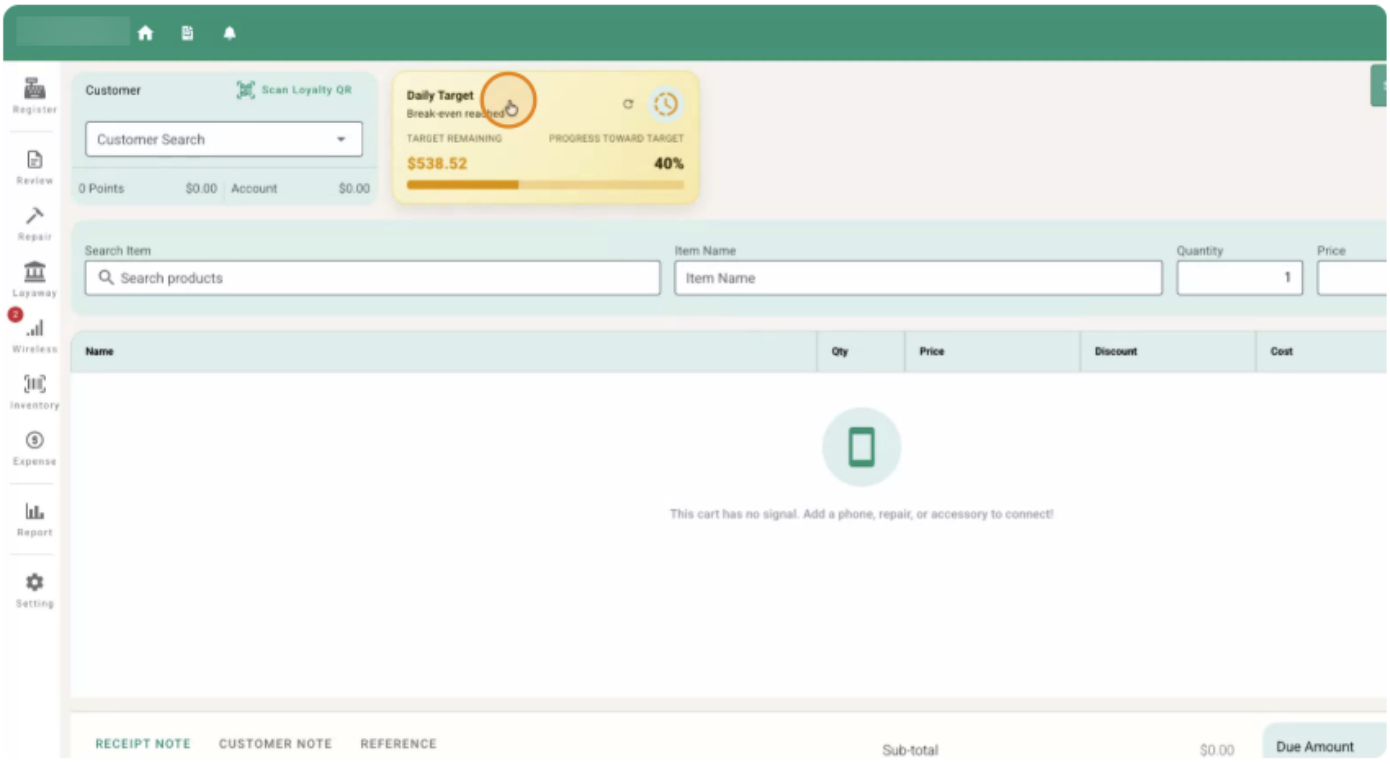
Monitoring Daily Sales Performance

Watch the Full Video

> Use the Daily Target and Profit Breakdown views to quickly understand how your business is performing today, including breakeven status, profit or loss, and detailed item-level sales information.

Step 1: Open the Daily Target View

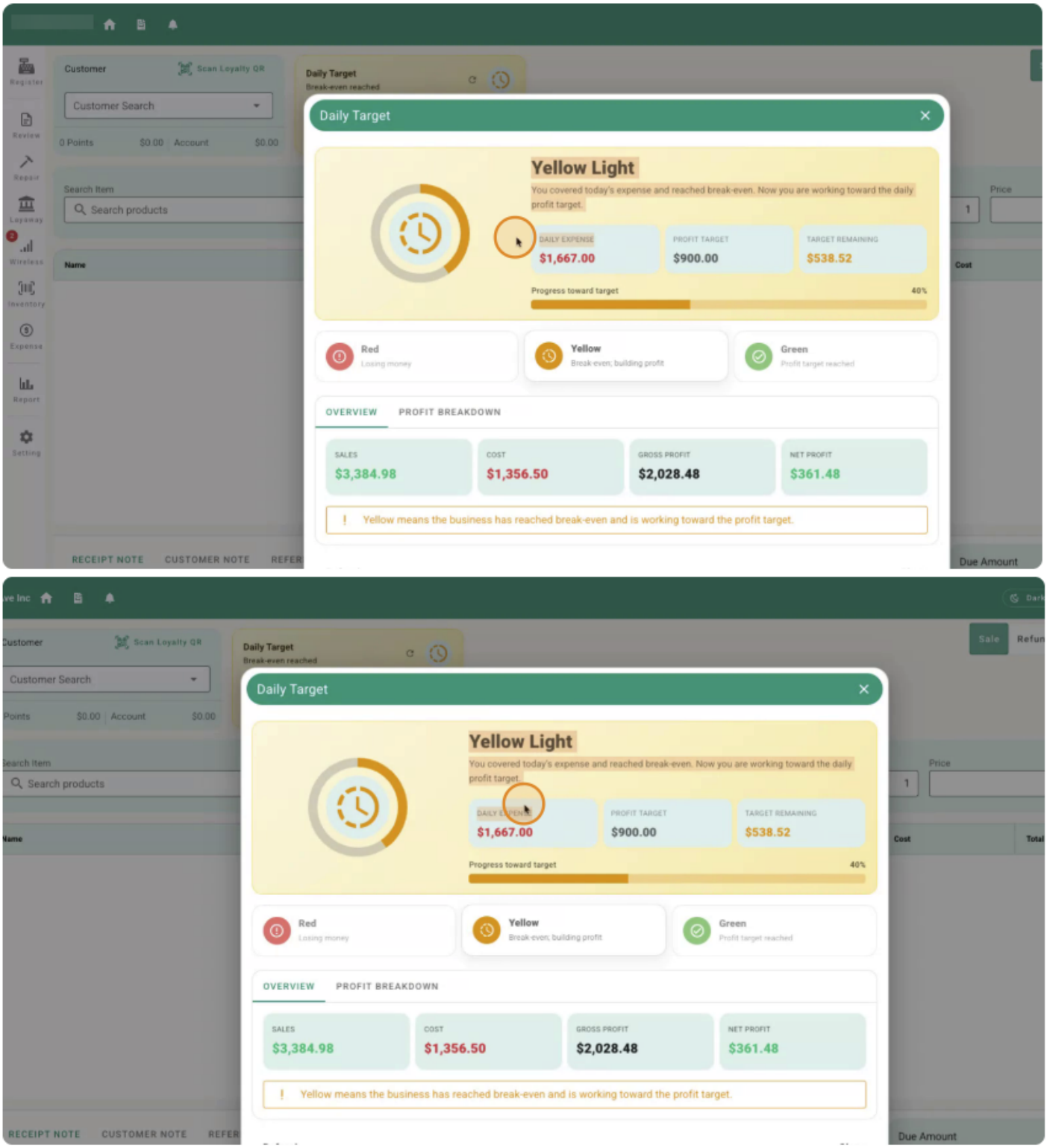
Click on **Daily Target** from your dashboard or main menu to see today’s sales status.



Step 2: Understand the Daily Target Indicators

In the Daily Target view, review the visual indicators:

- The **yellow line** shows your **breakeven point for today**.
- The panel displays your **daily expense**, your **profit target**, and **how much you have reached so far**.



Use the color indicators to quickly assess performance:

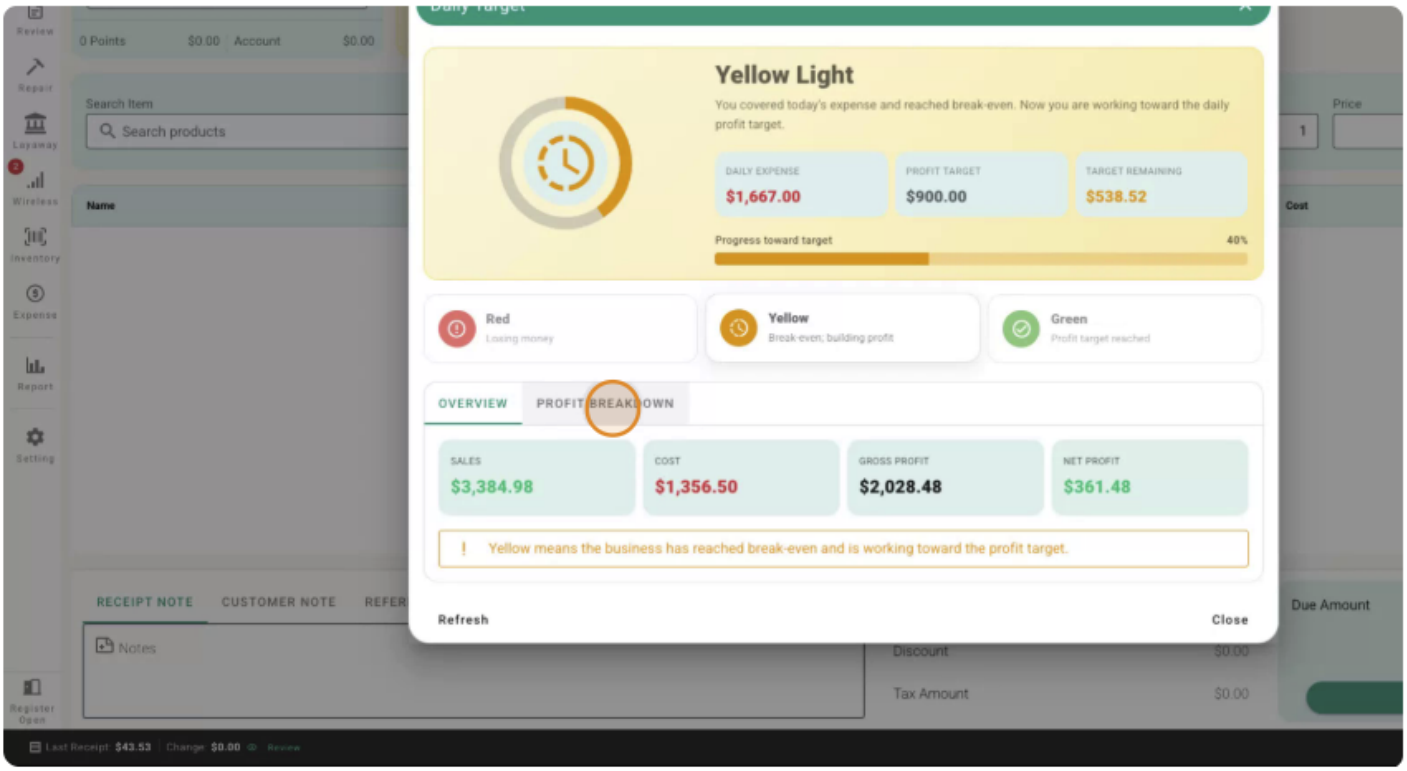
- **Yellow**: You are at **break-even** for the day.

- **Red**: You are **losing money**.
- **Green**: You are **in profit**.

This screen provides a **bird's-eye view** of your business performance for the entire day.

Step 3: Open the Profit Breakdown for More Detail

If you want detailed information, click on **Profit Breakdown** from the Daily Target screen.

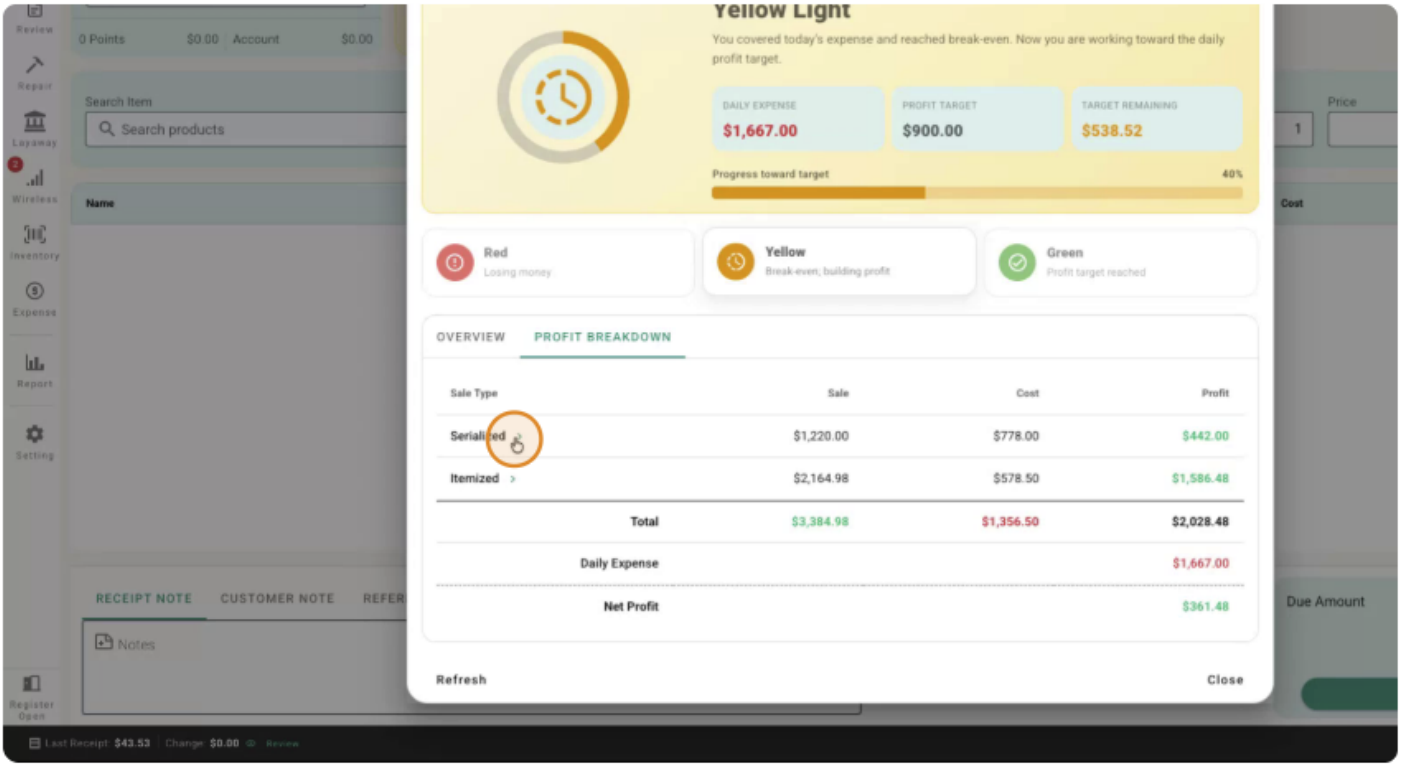


Here you will see a detailed breakdown of:

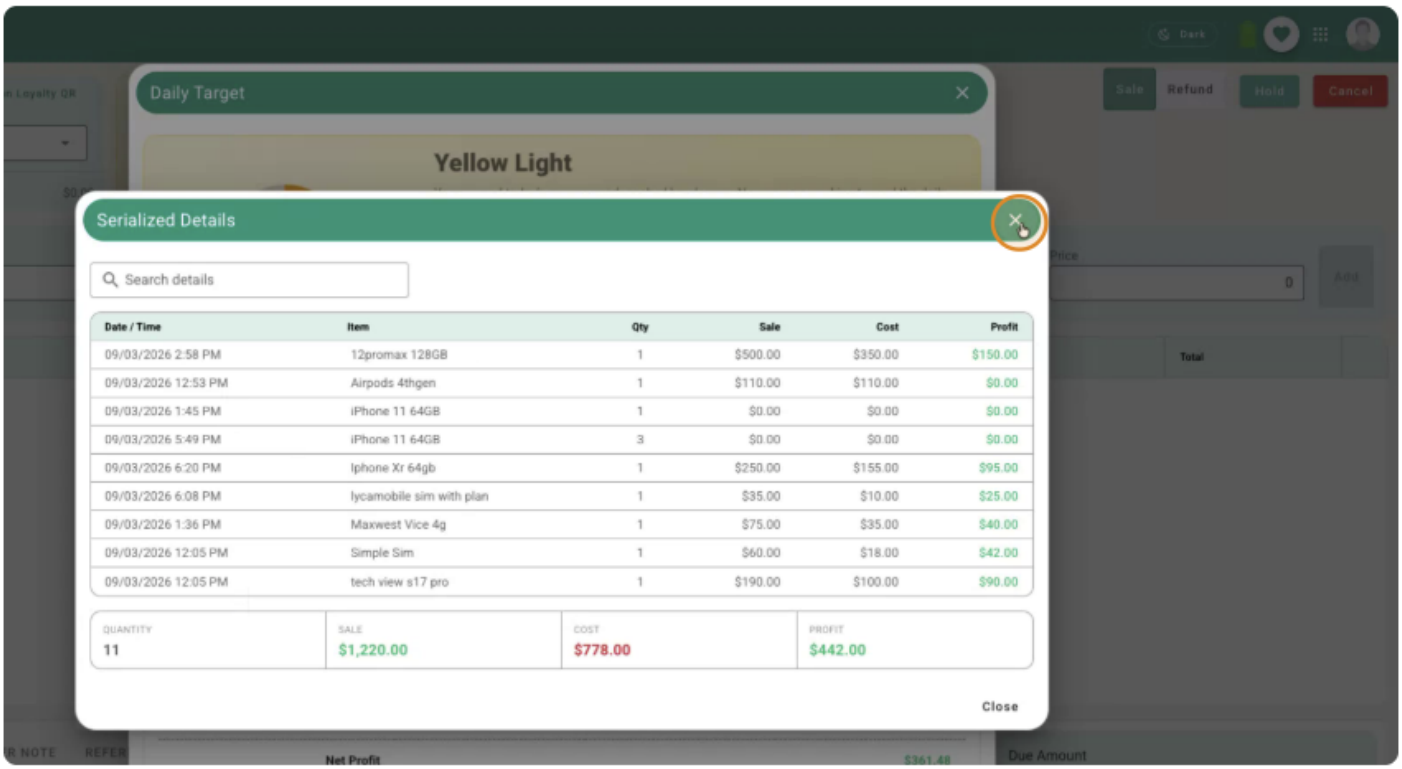
- **Serialized items**
- **Itemized (non-serialized) items**

Step 4: Review Serialized Item Details

Click on the **Serialized** tab or section to view detailed sales for serialized items.

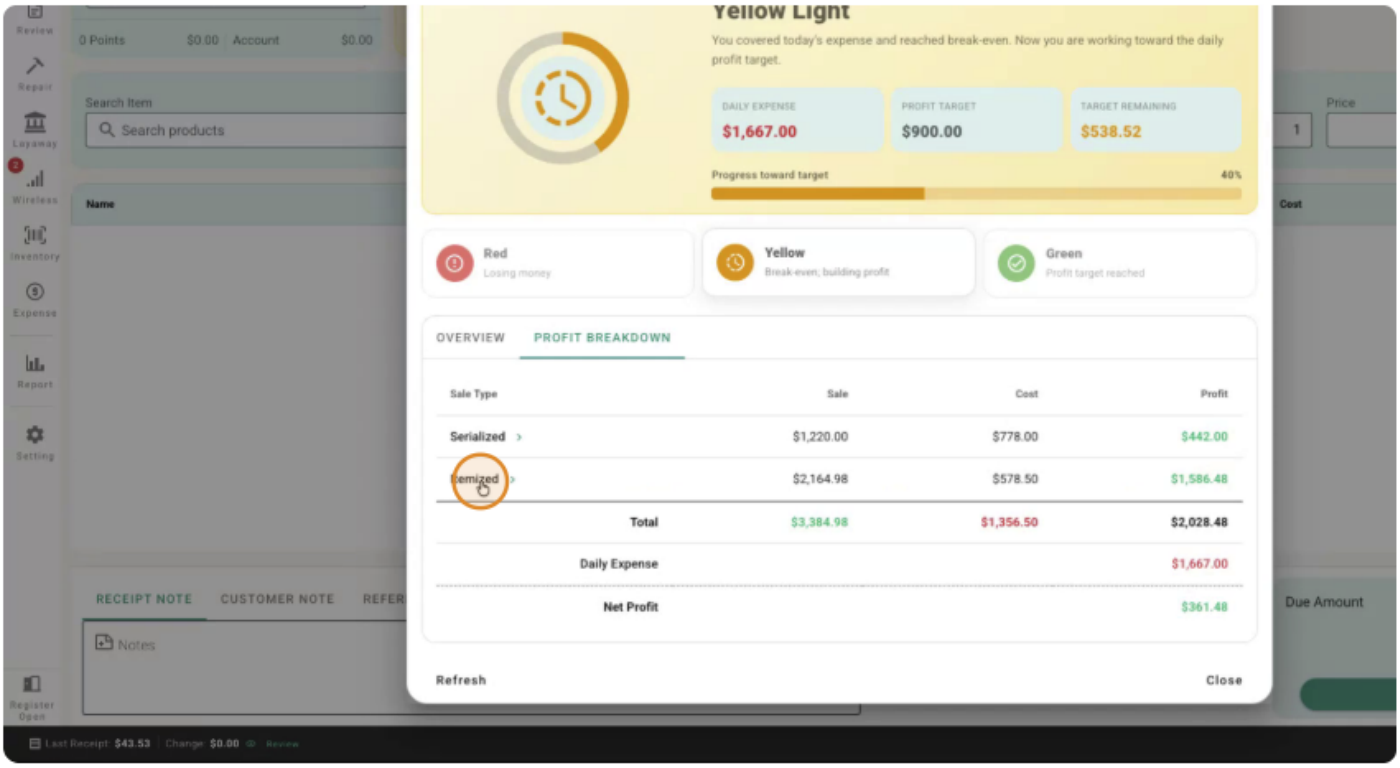


You will see a complete list of serialized sales. You can click on any entry to **open and view the corresponding receipt**.



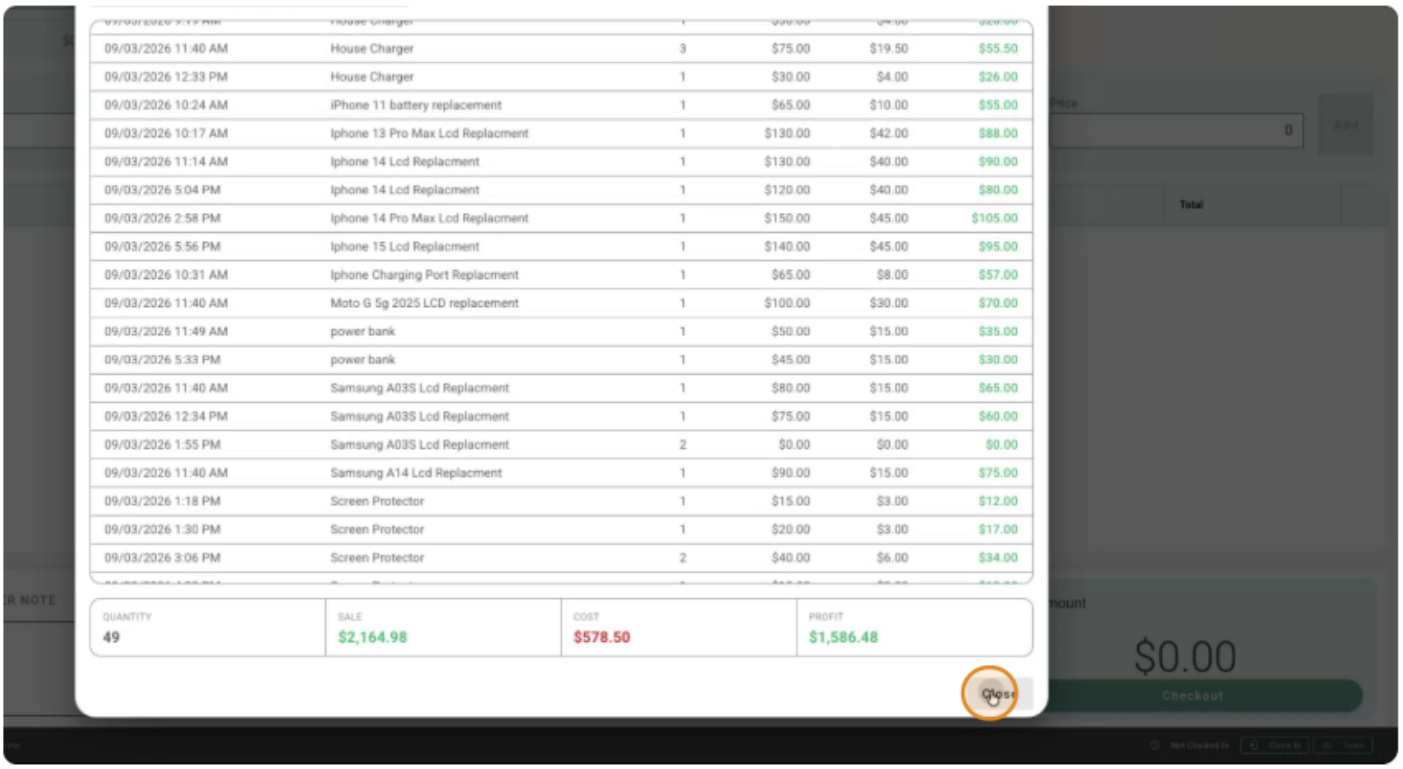
Step 5: View Itemized Sales and Close the Breakdown

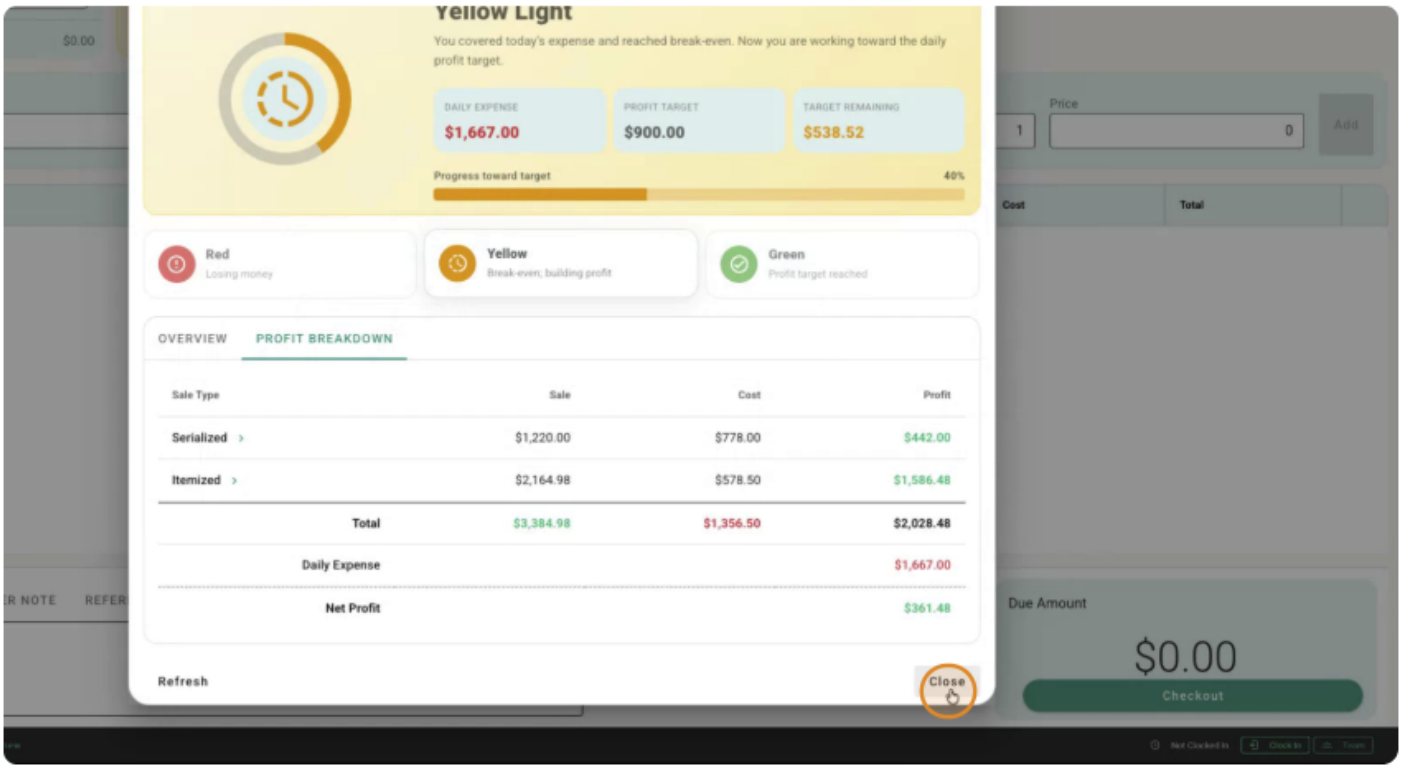
Click **Close** to exit the receipt or detail view and return to the Profit Breakdown screen.



From there, switch to the **itemized items** section to see:

- Which items you have sold
- Which items you have not sold
- A complete detail of item-level performance for the day.





Related guides

- How to set up Daily Target
- How to choose Compact or Full Daily Target view
- How to enable break-even and profit-mode alerts

1. Set Up Daily Target

Build a realistic daily goal from monthly expenses, desired profit, and business days.

How to set up Daily Target

In this guide: Turn monthly operating costs and desired profit into a practical sales target for each business day.

Steps

1. Open **Settings**.
2. Select **Daily Target & Light Setup**.
3. Add each recurring monthly operating expense, such as rent, payroll, utilities, insurance, and subscriptions.
4. Enter the **Desired monthly profit**.
5. Choose the number of **Business days per month** that the location is normally open.
6. Review the calculated Monthly Expenses, Monthly Target, and Daily Sales Target.
7. Choose Compact navigation view or Full register view.
8. Select **Save**.
9. Return to the main screen and verify that Daily Target appears as expected.

How the target is calculated

(Monthly expenses + desired monthly profit) ÷ business days = daily sales target

Example: $20,000 in expenses plus $5,000 desired profit, divided by 25 business days, creates a $1,000 daily target.

Tip

Use realistic monthly amounts and review them whenever rent, payroll, subscriptions, operating days, or profit expectations change.

How to add monthly operating expenses

In this guide: Add the recurring costs that the business must recover before it begins making profit.

Steps

1. Open **Settings > Daily Target & Light Setup**.
2. In **Add monthly operating expenses**, enter a clear expense name.
3. Enter the normal monthly amount.
4. Select **Add Expense**.
5. Repeat for every recurring expense.
6. Review the Monthly Expense List and total.
7. Save the settings.

Common expenses

- Rent or mortgage
- Payroll and employer costs
- Utilities, internet, and phone
- Insurance
- Software and subscriptions
- Marketing and other recurring overhead

What not to do

Do not enter sales, inventory purchase costs, or the same expense twice. Use a reasonable monthly estimate for costs that change from month to month.

Why it matters

The total monthly expenses form the break-even portion of Daily Target. If expenses are too low or incomplete, the dashboard can show profit before the business has actually covered its costs.

How to choose profit and business days

In this guide: Set how much profit the location wants to earn and how many days it has to reach that goal.

Steps

1. Open **Settings > Daily Target & Light Setup**.
2. Enter the amount in **Desired monthly profit**.
3. Select the normal number of **Business days per month**, from 1 through 30.
4. Review the calculated Monthly Target and Daily Sales Target.
5. Save the settings.

Choose realistic values

Desired monthly profit is added after expenses. Business days divide that combined monthly target into the amount the location should reach each open day. Fewer business days create a higher daily goal; more business days create a lower daily goal.

Example

If expenses are $18,000 and desired profit is $6,000, the monthly target is $24,000. At 24 business days, the daily target is $1,000.

Tip

Base business days on the location's normal schedule, not the number of calendar days in the month.

2. Understand Daily Performance

Read loss, break-even, profit, and the detailed Profit Breakdown.

How to read the red, yellow, and green status

In this guide: Use the Daily Target color to understand whether today's sales are below break-even, at break-even, or earning profit.

Red: losing money

Red means today's progress has not yet covered the daily share of monthly operating expenses. The location is still below its break-even point.

Yellow: break-even

Yellow means today's sales have reached the break-even point. The business has covered its daily expense target but has not yet reached the desired profit goal.

Green: profit mode

Green means today's sales have moved beyond break-even and reached the profit portion of the target.

What the panel shows

- Daily expense or break-even amount
- Profit target
- Today's progress
- The amount remaining to the next goal

Keep the result in context

Daily Target is an operating guide based on the expenses, profit goal, and business days entered in settings. Use reports and accounting records for complete financial reporting.

How to review Profit Breakdown

In this guide: See which sales are driving today's performance and open the related receipts.

Steps

1. Open Daily Target from the main screen.
2. Select **Profit Breakdown**.
3. Review the summary for today's performance.
4. Open the **Serialized** group to review devices sold by IMEI or serial number.
5. Open the **Itemized** group to review quantity-based products sold.
6. Open the **Service** group to review service or labor lines when available.
7. Select an entry to open its related receipt or detail.
8. Close the receipt to return to Profit Breakdown.

Use the breakdown to answer

- Which products or services contributed to today's result?
- Which serialized units were sold?
- Which receipts created the revenue and profit shown?
- How much remains before break-even or the profit goal?

Tip

If an expected sale is missing, confirm the sale date, location, receipt status, and whether the transaction was completed.

3. Display and Alerts

Choose where Daily Target appears and connect it with sales alerts.

How to choose Compact or Full Daily Target view

In this guide: Choose how much Daily Target information employees see on the main working screen.

Compact navigation view

Use Compact when you want the target to remain visible in a small area inside the navigation panel. This keeps more room available for normal register work while still showing performance status.

Full register view

Use Full when Daily Target should appear as a larger panel in the register area. This is useful when managers and employees actively monitor progress throughout the day and need more detail at a glance.

Change the view

1. Open **Settings > Daily Target & Light Setup**.
2. Go to **Choose where the target appears**.
3. Select **Compact navigation view** or **Full register view**.
4. Save the settings.
5. Return to the main screen and verify the new layout.

Which should you choose?

Compact is best for a less intrusive status. Full is best when Daily Target is a central part of the team's daily routine. Both use the same expenses, profit goal, business days, and color status.

How to receive Daily Target alerts

In this guide: Receive text messages when the location reaches break-even or enters profit mode.

Before you start

Set up Daily Target first. Break-even and profit alerts depend on the expenses, desired profit, and business days saved for the location.

Steps

1. Open **Settings > Text Alert Settings**.
2. Add the phone number that should receive alerts.
3. Under Event Alerts, enable **Break-even (Yellow Light)**.
4. Enable **Profit Mode (Green Light)**.
5. Save Text Alert Settings.
6. Use the test alert option to confirm text delivery when available.

Related guide

See How to enable break-even and profit-mode alerts for the complete setup. Scheduled sales summaries, message fields, and other event alerts are covered in the Notifications & Alerts book.