Efficiency Report

Release Notes · https://mountainstream.co/docs/efficiency-report/

Finance › Reports › Efficiency Report.

The efficiency report groups customer addresses in descending "efficiency rating". It divides total sales by the number of individual items. Less individual items means less work for the bakers and the packers.

[A screenshot of a website menu showing navigation steps: the Finance tab is selected, then Reports, and next the Efficiency Report under Reports, each highlighted with numbered pointers.]

Report Settings

[A screenshot of an Efficiency Report displays a ranked table of customers by efficiency, showing quantities and totals, with a bar chart below comparing customer efficiency and quantities. Hilton Café tops the Efficiency Report with the highest rate.]

Configure settings and view data in a bar chart

- Get a summary email on Monday covering the previous week.
  - Include **Unprocessed** data
  - Uncheck for **Published** invoices only.