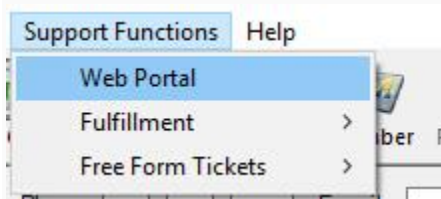
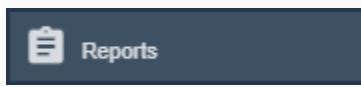


## Synopsis of Reports

You can pull reports from the Report tab in Web Portal. To access Web Portal from the Agile Ticketing Solutions Application, click the Support Functions button at the top of the screen. Then, click Web Portal.



Select the Report button on the left side of the screen.



New users for the Reporting Portal can be added in Agile just as you would add any new user in the system. This can be done in the Administration side of the Agile Application (See [Creating User Names for your Staff](#) for more information) or through the Web Portal (See [Adding New Users in Web Portal](#) for more information)

Reports are permission-based, so if you do not see a report listed, first check with your organization's administrator or contact your Agile Client Support Representative.

### ACCOUNTING

**Accounting Batch Audit - Pay Type Group and Account:** This report pulls by specific batch /date and then summarizes payments by payment type (i.e. Credit Card/Check/Cash) and account type. To see additional details of payment type such as types of credit cards, make sure to check the box for "Include Payment Type Detail".

**Accounting Batch - Location/Terminal Summary:** This report pulls sales information by specific accounting batch/date and then summarizes payments by Location and Terminal (i.e. box office 1, box office 2, etc).

**Accounting Batch Audit - GL Post Extract:** This report summarizes by specific date, and you will see payments categorized by the General Ledger names or codes. This is formatted as an Excel spreadsheet.

**Accounting Batch Audit - Journal Entries:** This report pulls a summary of sales based on the Revenue GL Accounts set up in Agile and gives you grand total Credits and Debits for that accounting batch.

**\*Agent Cash Out/User Batch Audit:** This is the most used report. This report will show details of a user's transactions. This allows the user to balance their daily sales and transaction activity for that day. It also tracks all sales by the user and manages daily cash and checks to balance at the end of the shift.

**Check Refund Requests:** Organizations that do not give cash or credit refunds, but requires to that a check is cut for the refund. This report pulls all of the refunds processed with a check.

**Consolidated Accounting Audit:** Choose a date range, and the transactions will be organized by Event/Item type and Sales Organization, with a summary on the last page of payment types and tips (if applicable).

**Consolidated Cash Out/Accounting Batch Audit:** This report pulls by specific accounting batch date for all users. It tracks all transactions and will be organized by Event/Item type and Sales Organization, with a summary on the last page of payment types and tips (if applicable).

**Credit Card Settlement:** This report pulls by specific Merchant Transaction Batch and gives a detailed listing of all credit card transactions in separate line items. This report will also show a breakdown of payments by event or item name.

**Credit Card Settlement Batch:** This report includes all details from credit card settlement but is pulled with a date range instead of Merchant Transaction Batch so it will provide multiple batches in one report.

**Customers w/Account Balance:** This report will show a listing of customer accounts with account balances (paid more than owed).

**Daily Audit:** This report pulls by specific batch date the event date range and can give Report the payment transaction details. It includes all detail of price types sold for that day's events as well as for any future events that were sold that day.

**Daily Audit- Consolidated:** This report pulls by a specific Accounting Batch and for a specific event date range. It also gives you event detail for any sales on that specific Day.

**Daily Audit- Location/Terminal Summary:** This report pulls by specific accounting batch and event date range for a summary of all sales, categorized by location and terminal for that day.

**Daily Sales Summary:** This report pulls by specific batch numbers/date and summarizes AMS sales and Web sales by revenue account types (i.e. event admission, fees, subscriptions). It also provides attendance summary, if you scan tickets.

**Deferred Balance Orders:** This report gives a listing of customers that owe money on their account.

**Event Invoice:** This report pulls a summary of sales for a specific event with a breakdown of sales by GL Account Revenue Codes, Payment Method, and Buyer Type.

**Gross Revenue- Box Office Statement:** This report allows you to pull information for a specific Sales Folder, a Specific Event Date Range, and Distributor, if applicable. It pulls the event date information, the number of tickets sold, and the gross revenue for that event.

**\*Gross Revenue- Rentrak/EDI:** Select event date range and enter Rentrak Org code. Enter the Venue name that ComScore/Rentrak has assigned to your organization. This can be set up as an email subscription that can be emailed directly to ComScore/Rentrak as well as others in your organization. This is a frequently used report for Art House organizations.

**Gross Revenue by Event:** This report pulls Gross totals for a Sales Date and Event Date Range. The report breaks down the Gross money and the total number of tickets sold for each event in that Date Range.

**Order/Delivery Fee Audit:** This report pulls by specific batch number/date and shows details of the order and delivery fees with buyer type and delivery method.

**Organization Audit:** Selects a sale date range for summary & pie chart of sales line types and sales channel. It also gives detail based on sales channel and buyer type.

**Organization Invoice:** Allows you to pull all sales for all items based on a sales date range. The reports are separated by Sales Channel and include the Account Revenue Number assigned to the price. The final page of the report gives you a summary of sales for that date range.

**Organization Invoice- Method of Payment:** This report pulls a list of all items sold and sorts it by payment method for each item.

**Organization Invoice- Project Summary:** Choose a sale date range to show sales by account type with project code information.

**Organization Invoice- Redeemed Revenue Summary:** Choose sale date range with event date range and see a breakdown of revenue accounts unredeemed and redeemed.

**Organization Invoice- User Activity:** Choose a sale date range to see sales categorized by the user then event name.

**Sales Level Organization Invoice:** Choose organization and sale date range then separated into sales channels.

**Sales Revenue Audit:** Select batch number/date to see a breakdown by revenue account and sales line.

## **CATALOG**

**Catalog Audit:** Shows all Catalog items sold for a certain sales period. You can include detail by Sales Channel, By Location and Also include Inventory Details.

**Catalog Audit Extract:** Gives you the Catalog Audit information in an Excel spreadsheet.

**Catalog Manifest:** Report pulls Customer Order detail, including Customer, the date of the order, order number, Items purchased, amount of purchase, and how they purchased.

**Catalog Manifest Extract:** Gives you details for catalog items purchased in a detailed spreadsheet.

**Catalog Per Caps:** Report takes Catalog Sales and Event Sales to show the per cap for each day.

**Catalog/Event Sales Analysis Extract:** Choose event date range to show event info with Catalog sales by purchase date and time.

**Product/SKU Sales Audit Extract:** Report pulls current Inventory in a spreadsheet for an easy inventory check.

**Product/SKU Inventory Audit Extract:** Report pulls a spreadsheet of all catalog items that were sold.

## CUSTOMER

**Customer DB Extract:** Spreadsheet shows a full listing of all customer accounts in your database.

**Customer Classification Extract:** If your organization has classifications setup, this report will allow you to pull lists of each customer group and provide their name, email, address, and phone data.

## DONATIONS

**Donations Manifest:** Choose donation name and sale date range to see a sales summary by sales channel followed by purchases customer info and donation amount. PDF or HTML view only.

**Donations Manifest Extract:** Choose donation name and sale date range to see a listing of donors with customer info, payment info, and order info. This is formatted for an Excel spreadsheet.

**Donor/Member Manifest Extract:** This report pulls donor and member detail information for a specific Sales Date Range. This is formatted for an Excel spreadsheet.

## EVENT

**comScore Swift Extract:** This report pulls all information that is sent to comScore Swift on a nightly basis. Pulls detail by Distributor, Film, Ticket Types, Ticket Prices and Gross Revenue for that event. Formatted for Excel spreadsheet. Used to confirm information that is pushed to Swift on a nightly basis and should be used in conjunction with Swift BOR.

**Attendance By Screen:** Choose event date range with the option to filter by venue to see a breakdown of attendance with gross revenue by event and event date.

**Consolidated Event Audit:** Choose the 'Organization folder' then event & sales date ranges. This report will pull a summary by Event name when the event may have multiple

showing dates.

**Daily Schedule:** Choose event date range with option to filter by venue to show schedule with venue, event, start date & time, end date & time, and duration information.

**Delivery Method Extract:** Choose the Organization folder, the event, delivery method, and sale date range to see customer info by delivery with order details.

**Event Audit:** Report allows the user to pull financial information for a specific event date and breaks down the detail based on the sales, buyer type, inventory, delivery method and payment method.

**Event Audit-Sales and Usage Summary:** Choose the 'Organization folder,' then event name, and select the event & sales date ranges to see a breakdown by tier of tickets ordered, printed, and redeemed.

**Event Audit Lite:** Choose the 'Organization folder,' then event name, and select the event & sales date ranges to see a summary of sales by tier, buyer type, and payment method.

**Event Audit Settlement:** Choose the 'Organization folder' then event name and select the event & sales date ranges to show sales by tier, payment method, and ticket price & type.

**Event Guest List:** Pulls a total list of customer purchase information for an event. Gives order detail for each order.

**Event Inventory Summary:** Choose event date range to see all detail of sold, comp, held, ADA, and percent available. This gives you a quick view of inventory available for purchase, those sold and what is still on hold.

**Event Manifest:** Choose the 'Organization folder,' then event name, and select the sale date ranges to show the customer order information for that event, including their order number, the number of tickets purchased, payment type and any questions that might have been asked for that transaction. Also shows order notes if added.

**Event Manifest w/Seat Detail:** Choose the 'Organization folder,' then event name, and select the sale date ranges to show event sales by customer, with customer information, delivery method, and order information.

**Event Reconciliation:** This report pulls detailed information for each showing date and time with ticket detail and gross revenue for each showing.

**Event Reconciliation Summary:** Choose the 'Organization folder,' then event name, and select the sale date ranges to show event sales by venue and ticket type in separate pages.

**Event Sales By User:** Choose 'Organization' and Event to see event sales separated by User then sold by ticket types.

**Event Setup:** Choose 'Organization' and Event to see setup and properties of the tier(s) and ticket type(s) by sales channel.

**Event Ticket Activity Extract:** Choose 'Organization' and Event to see event ticket detail by barcode.

**Inventory Summary:** Choose 'Organization' and Event date range for a breakdown of inventory's available/ordered/disabled seats organized by tier and inventory name.

**TixTrack Seating Extract:** Choose 'Organization' and Event name for a breakdown of the seating with tier, inventory name, ticket type, and quantity.

## GATE CONTROL

**Gate Control Detail Extract by Date:** Report pulls scan data for a specified date of time. Shows the information for each scan, ticket type, event type tier and order number. Also, includes the customer's name and order number. Formatted for an Excel spreadsheet.

**Gate Control Summary by Date:** Choose the scan date range to pull a Summary report by date and event name with Valid, Not Valid, Re-Scan, and Void totals.

## GIFT CARDS/CERTIFICATES

**Gift Card Activity:** Pulls information on sales made with the gift card as a payment type. Gives detail on what was purchased and how much was used on the gift card.

**Gift Card Extract:** Pulls a report of all gift card numbers with the current balance for each card.

**Gift Card Manifest:** Choose organization, gift card program, and sale date range to pull the html/pdf report of sales by customer record with gift card detail down to the Gift Message.

**Gift Card Manifest Extract:** Choose organization, gift card program, and sale date range to pull an Excel report of sales by customer record with gift card detail down to the Gift Message. Formatted for Excel spreadsheet.

## MEMBERSHIP

**Full Membership Extract:** This report pulls all active members in an excel spreadsheet. Choose organization, membership program, and member expiration date to pull detail of membership records with member info, price, and question detail.

**Member Purchases Analysis Extract:** This report pulls a spreadsheet that shows all of the purchases made by a member. Choose event date range for the report of member event purchases during specified time period.

**Membership Audit:** This report pulls the revenue detail for all memberships purchased. Choose organization and sale date range to see a membership sales summary by price type.

**Membership Extract by Date:** Choose organization, membership program, then sale date range to see by order, the memberships sold in that time period.

**Membership Labels:** Choose organization, membership program, and expire date range for an easy way to print mailing labels.

**Member Usage Extract:** This report shows how a member uses their membership. Choose the organization, the membership program or ID, and then the sales date range to generate an Excel spreadsheet with redeemed membership benefits. It will include what was purchased, purchase date, benefit groups, and more.

## **ORDERS**

**Credit Card Chargeback Details:** Enter the order number and a case number (found on chargeback statement) to see the detail of item, charge amount, and delivery method to print off and mail with your chargeback response.

**Event Orders By Sales Date Range:** Choose your event organization folder and the sales date range to see orders separated by order number.

**Order Confirmation:** Enter the order confirmation number and see the customer's confirmation page that is sent to them after a purchase.

**Order Confirmation Batch:** Choose a certain batch number to see all order confirmations pertaining to that batch of transactions.

**Refund/Cancellation Summary:** This report will give you the detail for orders that have been either canceled or refunded based on a specific Sales Date Range. It includes Customer Name, Order Number, Refund Date, where they purchased, who in your box office processed the refund, where the refund was processed, event information, and total amount of refund.

**Sales Transactions Extract:** Choose sale date range and see a listing of all items purchased by each customer record.

**Will Call List:** Will Call List pulls a list of all customers who have selected Will Call as their delivery method. This list will be in alphabetical order by last name.

## **PACKAGES**

**Package Orders Extract:** This report gives you details of all package orders including the customer's information, the order number and date, the package prices, and any questions and answers that were given.

**Package Renewal Status Extract:** This report pulls an excel spreadsheet that shows the status of season packages that have not renewed.

## SALES

**Customer Extract by Date:** This report allows you to pull Customer data in a spreadsheet based on a sales date range. Choose both a sale date and event date range to pull sales data with both customer and order detail.

**Customer Extract by Event:** This report pulls customer information based on a specific event date. Choose Organization and event id to see sales for a specific event with customer data.

**Customer Extract by Event Organization:** Choose Organization and event date range to view sales without limitation of one event and organized by entire folder.

**Event Sales and Availability Extract:** This workbook in Excel has two spreadsheets. The first spreadsheet pulls the sales information for events in a specific event date range and includes the Event Name, the Event Date, The Event Venue, What has been purchased to date with the break out of ticket type, income and where it was purchased. The second spreadsheet gives you the remaining inventory for those events along with any holds that are placed within the event.

**Event Sales by Day Extract:** This report shows a summary of tickets sold, total amount sold and the date of the sale for each event in a specific Event Date range. This should be pulled as an Excel Spreadsheet.

**Event Sales Summary Extract:** This report pulls total tickets sold and total gross money for each event in a Grouped Manifest Excel Spreadsheet.

**Package Sales:** This report pulls a summary of subscriptions with detail of the packages, with quantity sold, and gross dollar for each package type.

**Promotion Usage Summary:** This report pulls a summary of a promotions' performance. It will give the promotion's title, date, tier, and price. It will also show how many promotions have been ordered, printed, and redeemed, and the total cost of each.

**Sales by Event/Day:** This report gives you a breakout of number of tickets sold on a specific date for a specific event.

**Sales by Location:** This report breaks out based on what was sold for a specific event at a specific terminal.

**Sales by Promo Code Extract:** This spreadsheet pulls information for all tickets purchased using a promotion code.



**Sales by Promotion:** This report pulls the same information as the Sales by Promo Code Extract. The difference is that it is formatted for PDF.

**Sales by Sales Channel/ Buyer Type:** Gives you Sales information for events based on the Sales Channel (i.e. Box Office, Online, Phone, etc.). This is formatted for PDF.

**Sales by Sales Channel/ Buyer Type Extract:** This report gives you sales information in an Excel spreadsheet for events purchased through a specific sales channel (i.e. Box Office, Online, Phone, etc.).

**Sales by State/City/MSA Extract:** This report pulls sales information based on the sales date range, the event date range and allows you to group by either State, Zip Code, or Metropolitan Statistical Area.

**Sales by Tender Type:** This report pulls sales information based on payment type.

**Sales by Time:** This report pulls sales information based on the sales date range and the event date range. It also allows you to group by either Hour, Day of Week, Week, or Month.

**Sales by User:** This report pulls information for sales by based on the sales date range, the event date range, and the user that sold the tickets.

## SALES DATA EXTRACTS

**Sales Data Extract- Price Category Summary:** Choose sale date range to see the extract of sold items with Org Name, Tier Name, Ticket Type, Sales Channel, Event details, and payment type. There is no customer data.

## SEASON TICKETS

**Season Ticket Orders:** Pulls a detailed PDF of each order with the dollar amount of the tickets, the seat assignments, Amount paid to date, and Balance Due. These can be used as a receipt that can be added to the order that is being mailed.

**Season Ticket Orders w/Seat Assignments:** This is a list of customer orders in alphabetical order by last name with their seat package type and seat locations.

**Season Ticket Renewal Invoice Extract:** This report pulls a spreadsheet of all packages for any subscriber that has not renewed their tickets. Gives the customer name, address, package name, Full Seat Locations, Package Amount, Total Renewal Cost, Order Fee and Order Total. This is meant to be used to merge into an invoice that can then be mailed to the customer.

**Season Ticket Renewal Status Extract:** This report pulls the package information and shows who has renewed and who has not renewed.

**Season Org Ticket/ Package Orders:** This report is a summary of what packages have been sold, how many have been sold, and the total amount of those packages sold for a specific sales date range. It then gives you the customer detail for each package sold.