
Events Center Go-To Reports

The site has many reports that can be pulled and shows varying degrees of information. I recommend exploring the site and reports to see which one works best for your chapter's needs, but below are some of my recommendations.

Many reports may feel overwhelming at first glance but hide the columns you do not need and see if the below suggestions will work for you.

1. To see all guest information that has (or has not) been entered on the tickets

- a. Mobile Dash
- b. Guests
- c. 'Get Guest List data via email'
- d. Report Organization = Guest & Ticket Info
- e. Site will email the report to you
- f. This is similar to the report that will automatically be emailed to X number of days before the event, depending on what you selected when setting up the event.

GUEST LIST
Get a copy of the Guest List delivered via email.

Data Format:
 Spreadsheet (CSV) Printable (PDF)

Report Organization:
 List by ticket Summary by Buyer Summary by Guest
 "Pivot" List by Guest Guest & Ticket Info

CSV List organized by Ticket Order shows which tickets still require entry of Guest Info, and which are complete. It's most useful to get a copy of this report just before the event.

Tickets Included:
All Tickets

Send To:

2. To see who has been entered into your event *specifically if using Check/Cash Sales page to enter memberships

- a. Sales Dashboard
- b. Guest List (left-hand menu)
- c. Download the CSV Contacts Report at the bottom of the page.

**If guest information was saved on a ticket, it will show the Buyer and Guest information, but if guest info was not specifically saved it will only show up as Buyer. This data will hit CRM and will assume the "buyer" wanted the ticket for themselves or was entered through the Check/Cash Sales page.*

Guest, Check-In, and Contact Reports

| | | |
|---------------------------------|---|-----------------------------|
| <i>For Selected Performance</i> |  | Guest List |
| <i>For ALL Performances</i> |  | Tickets and Check-In Status |
| |  | Contacts Report |

3. To see how many tickets with memberships have been sold

- Mobile Dash
- Guests
- 'Get Guest List data via email'
- Report Organization = Summary by Guest
- Tickets Included = All Tickets (incl. Bundle and Non-Admission)
- Site will email the report to you
- Filter the spreadsheet by the event types that contain a membership (i.e., Associate Membership + Meal, Affiliate Membership only, etc)

GUEST LIST

Get a copy of the Guest List delivered via email.

Data Format:
 Spreadsheet (CSV) Printable (PDF)

Report Organization:
 List by ticket Summary by Buyer Summary by Guest
 "Pivot" List by Guest Guest & Ticket Info

CSV Summary includes: Guest named on ticket, Order date, Ticket type and count

Name Format:
 Last, First First Last

Order by:
 Guest name Purchase date

Tickets Included:
 Admission tickets only
 All tickets (incl. Bundle and Non-Admission)
 Will-call tickets only

Send To:

4. To check people in at the door using a printed-out spreadsheet

- Sales Dashboard
- Site Services
- Guest Check In (note Mobile Service PIN for the event)
- Select 'Print List' and print or view as a PDF

5. Online vs Offline Sales

- CSV Version
 - Sales Dashboard
 - Site Services
 - Guest Check In (note Mobile Service PIN for the event)
 - Select 'Download' and print or view as a CSV file. Filter out any unnecessary information as needed. *Column Z will indicate either 'OFFLINE' or 'STRIPE_ACCOUNT' (indicating an online sale).*
- PDF Version
 - Sales Dashboard
 - Site Services
 - Guest Check In (note Mobile Service PIN for the event)
 - Select 'Print List' and print or view as a PDF
 - On the right-hand side of each order, you will see 'ONLINE' or 'OFFLINE'. *This indicates if the sale was made by the individual online, or by an officer/volunteer through the Check/Cash Sales page.*

6. Breakout Sales by Ticket Type

- a. A count of each ticket type is available on the Mobile Dash main page, simply open the "Sales by Ticket Type" link. The highlighted *For Admission* ticket count provides a simple count of how many tickets have been sold that account for individuals attending your event.
- b. Sales Dashboard
- c. Site Services
- d. Guest Check In (note Mobile Service PIN for the event)
- e. Select 'Download' and print or view as a CSV file. Filter out any unnecessary information as needed. *Column G shows the Ticket Type, including the Bundles and all tickets included within those bundles.*
- f. Filter out as needed to find sponsors or other membership types and their counts.

| Trevor's Test Event May 01, 2021 7:00 PM (ACTIVE) | | |
|--|-----------|----------------|
| Cash/Offline | 3 | \$150 |
| Online | 27 | \$2,150 |
| Totals | 30 | \$2,300 |
| ▼ Sales by Ticket Type | | |
| Affiliate Membership + Meal Ticket | | |
| | 14 | \$240.00 |
| Youth Membership + Meal Ticket | | |
| | 2 | \$60.00 |
| Meal Ticket | | |
| | 10 | \$0.00 |
| * For-Admission Tickets * | | |
| | 26 | \$300.00 |

If you notice on any of these reports that:

- a. Someone's name/information is duplicated,
- b. Someone is missing their address (especially important on a membership ticket),
- c. Someone spelled something incorrectly, or
- d. Someone is missing (potentially who paid outside of the site via cash or check),

Please use the **Guest Check In page** to edit their information.

If adding an individual or ticket sale to the event, first check that they are not already included in a bundle. Then add them to the event via the **Check/Cash Sales page**.