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# REPORTING CENTER: CORE REPORTS

*Last Updated May 2024*

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# ORDERS LIST

The Order List report within the Reporting Center displays a line item for all orders. The Order List can be filtered by event, school, department, and order date range. Additionally, there is an option to show or hide product orders. To view the Order List details outside the box office, the data can be exported to a .CSV. An option to download an email list is also available.

## Accessing the Order List

- 1) From the top menu bar, select **Reports**
- 2) Click **Reporting Center**
- 3) Select **Order List** from the left-hand list of Core Reports

The screenshot displays the HomeTown University Reporting Center. The top navigation bar includes 'Dashboard', 'District', 'Events', 'Reports' (highlighted with a red box and number 1), 'Social', and 'Fundraising'. The main header shows 'Standard Report | Orders List' (with 'Orders List' highlighted by a red box). Below this, there are filter sections for 'School' (HomeTown University), 'Department' (All Departments), 'Event' (All Events), 'Start' (04/19/2024 1:40 PM), and 'End' (Select end date & time). An 'Include Product Orders' toggle is set to 'Yes'. A search bar is present with the text 'Search by attendee name, email address, phone number, order number, last 4 of credit card'. On the left, a 'Core Reports' sidebar lists 'Orders List' (highlighted with a red box and number 3), 'Attendee List', 'Customers List', and 'Events Details'. The main content area shows 'Showing all 10 results' for 'School: HomeTown University' and an 'Export to CSV' button. At the bottom, a table header is visible with columns: Event ID, Event Name, Order #, Time, Status, Last Name, First Name, Email, and Phone.

There is also a shortcut available in the top menu bar, under **Reports**, called **Order List**.

# ATTENDEE LIST

The Attendee List report within the Reporting Center displays a line item for each ticket purchased. This report can be filtered by school, department, team, event, event start and end time. Additionally, a toggle switch will be available to include or exclude Pass Holders. When Pass Holders are included, the Attendee List can only be filtered on event name. To review data outside of the box office, this report can be exported to a .CSV.

## Accessing the Attendee List

- 1) From the top menu bar, select **Reports**
- 2) Click **Reporting Center**
- 3) Select **Attendee List** from the left-hand list of Core Reports

The screenshot displays the Hometown Reporting Center interface. At the top, a navigation bar includes 'Dashboard', 'District', 'Events', 'Reports' (highlighted with a red box and the number 1), 'Social', and 'Fundraising'. Below this, the 'Standard Report' section is titled 'Attendees List' (also highlighted with a red box). The interface features several filter options: 'School' (set to 'HomeTown University'), 'Department' (set to 'All Departments'), 'Team' (set to 'All Teams'), 'Event' (set to 'All Events'), 'Start' (set to '04/19/2024 1:23 PM'), and 'End' (set to 'Select end date & time'). There is also a toggle for 'Include Pass Holders' (currently 'Off') and a 'Search Events' field. A left-hand sidebar lists 'Core Reports' including 'Orders List', 'Attendee List' (highlighted with a red box and the number 3), 'Customers List', and 'Events Details'. The main content area shows 'Showing all 16 results' and a 'Clear All' link. Below this is an 'Export to CSV' button. At the bottom, a table header is visible with columns: 'Event Name', 'Event Start Date', 'Ticket/Reserv#', 'First Name', 'Last Name', 'E-mail', 'Phone', and 'Tic'.

# CUSTOMERS LIST

The Customers List displays a concise list of purchaser and attendee data. The Customers List can be filtered by event, school, department, and team. To view the Customers List outside the box office, the data can be exported to a CSV.

## Accessing the Customers List

- 1) From the top menu bar, select **Reports**
- 2) Click **Reporting Center**
- 3) Select **Customers List** from the left-hand list of Core Reports

The screenshot displays the Hometown software interface. At the top, a dark navigation bar contains the following menu items: Dashboard, District, Events, Reports (highlighted with an orange box and a '1' in a speech bubble), Social, and Fundraising. Below this, the main header area shows 'Standard Report | Customers List' (with 'Customers List' highlighted by an orange box). The interface includes several filter sections: 'School' (set to HomeTown University), 'Team' (set to All Teams), 'Department' (set to All Departments), 'Event' (set to All Events), 'Start' (date and time selector), and 'End' (date and time selector). There is also a 'Search Events' field with a magnifying glass icon. On the left side, a 'Core Reports' sidebar lists: Core Reports, Orders List, Attendee List, Customers List (highlighted with an orange box and a '3' in a speech bubble), and Events Details. The main content area shows 'Showing all 28 results' and a 'Clear All' link. Below this is an 'Export to CSV' button. At the bottom, a table header is visible with columns: First Name, Last Name, and Email. The page number 'Page 1 of 1' is displayed in the bottom right corner.

# EVENT DETAILS

The Events Details report within the Reporting Center displays a list of all events that have ticket sales and shows the total number of tickets issued. This report does not include any voided tickets, regardless if they have been refunded or not. However, this report does include tickets that have been refunded, but not voided. This report can be filtered by school, department, team, event, start and end time. To review data outside of the box office, this report can be exported to a .CSV

## Accessing the Event Details Report

- 1) From the top menu bar, select **Reports**
- 2) Click **Reporting Center**
- 3) Select **Event Details** from the left-hand list of Core Reports

The screenshot displays the Hometown Reporting Center interface. At the top, a dark navigation bar contains the following menu items: Dashboard, District, Events, Reports (highlighted with a red box and the number 1), Social, and Fundraising. On the right side of this bar are links for Settings and Log out. Below the navigation bar, the main content area is titled "Standard Report | Events Details" (with "Events Details" highlighted by a red box). This section includes several filter controls: "School" (set to HomeTown University), "Department" (set to All Departments), "Event" (set to All Events), "Team" (set to All Teams), "Start" (set to 04/19/2024 1:48 PM), and "End" (set to Select end date & time). There is also a "Search Events" field with the placeholder text "search by event name". A blue "Apply Filters" button is located to the right of the filter controls. On the left side of the main content area, there is a sidebar with a list of "Core Reports": Orders List, Attendee List, Customers List, and Events Details (highlighted with a red box and the number 3). Below the sidebar, the main content area shows "Showing all 9 results" and a "School: HomeTown University" filter. A blue "Export to CSV" button is visible. At the bottom, a table header is shown with columns: Start Time, Event Name, Venue, School, Department, and Team. The page number "Page 1 of 1" is displayed in the bottom right corner.