

REPORTING & THE DATA CUBE





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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Go Reporting and the Data Cube.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	20/07/2015	This is a new document	JW

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INTRODUCTION

Based on the Green 4 concept that..."We give you the tools and provide a framework for you to develop your business", the overall BI offering, including the Advanced Find function, Reports, Dashboard information, the Data Cube etc. have been further enhanced to provide the ability to 'drill down' to the raw data captured by the Go systems.

REPORTING & THE DATA CUBE



REPORTING & THE DATA CUBE

1. ADVANCED FIND

2. REPORTING

3. DATA CUBE

Advanced find is a tool in Microsoft Dynamics that allows users to look up data, based upon criteria important to them, which can subsequently be used for reporting purposes.

The tool allows searches on multiple fields in the primary record type, as well as multiple fields within a related record. Go modules offer a number of Reports which allow organisations to view and manage the data collected in CRM. Many Reports use filters which can be set so that specific data can be chosen to be displayed in the Reports. Report data can be further analysed so that feedback and future marketing campaigns can target specific areas. The Data Cube uses Excel to extract data from CRM so that it can be analysed and used even further. This is especially relevant to sales data such as particular Fixtures, Series or other types of products.

The Data Cube enables users to drill down and dig deep into the data. For example to find out the payments received per Channel on a particular date. The Data Cube is a tool which allows organisations to make even further use of the data that is collected from within CRM



1. ADVANCED FIND

Advanced find is a tool in Microsoft Dynamics that allows users to look up data based criteria important to them which can subsequently be used for reporting purposes. The tool allows you to search on multiple fields in the primary record type, as well as multiple fields within a related record.

If for example a user wanted to search for a Contact that had the last name 'Smith', they would look for Contacts that had the last name 'Smith' and the query would look like this:

FILE	ADVANO	CED FIND)				Microsoft Dyn	amics CRM	System Administrator 🗘 go 🔈
Query	Saved F Views	Results	New	Save	Save As Edit Columns Edit Properties /iew	2 Clear	(E Group AND (E Group OR → Details Ouery	Download Fetch XML Debug	
Look fo	or: Contac	cts				∨ (Jse Saved View:	[new]	V
× .	<u>Last Name</u> <u>Select</u>			Equals	i	Smith			

This query would return all contacts that had the last name 'Smith'.

By adding a **related** field, the user can search the content of a related record form. For example, if a user wanted to find out if any of the contacts were associated with an account where the City field on the account was 'Lutterworth', a related field would need to be added to the query:

								Microsoft Dyna	amics CRM	System Administrator 💡
FIL	E	ADVAN	ICED FINE	D						go a
Que	ery	Saved Views	Results	New	Save	Gave As	Clear	[문 Group AND [문 Group OR 금 Details	Download Feto XML	tch
		Show			1	View		Query	Debug	
Loc	ok fo	or: Cont	acts				\checkmark	Use Saved View:	[new]	V
	v <u>i</u>	Last Nam	2		Equals	2	<u>Smit</u>	h		
		Select								
	۷.	Parent Cu	stomer (A	Account)						
		✓ Addre	ess 1: City	1	<u>Ec</u>	quals	L	utterworth		
		<u>Selec</u>	t							

By doing this, the Advanced Find will return all the contacts with last name 'Smith' and by adding the related field – the Advanced Find will then search on the Account form to return the contacts associated with an account that has a City of 'Lutterworth'. This is possible when the relationship between the two contacts already exists.



1.1. RUNNING AN ADVANCED FIND

To run an Advanced Find in Microsoft CRM:

- a) Go to the entity you want to search on (In this example we will search for contacts, therefore select **Contacts** from the **Navigation Bar**).
- b) Select the **Advanced Find** button on the ribbon. This is found by clicking on the more commands symbol as demonstrated below.



c) The Advanced Find form will be displayed. Select the Details menu option.

FILE ADVANCED FIND	go a
Query Image: Saved Results Image: Save As New Image: Save As Save Bedit Columns Edit Columns Save Edit Properties Image: Save As Sa	
Look for: Contacts Use Saved View: Active Contacts	V
Status Equals Active Select Select	

d) Next, in the **Look For** drop down menu choose what the Advanced Find is to search for before choosing in the **Use Saved View** drop down an appropriate view. In this example as we are searching for contacts select Look For - Contacts and Use Saved View - Active Contacts.

FILE ADVANCED FIND		Microsoft Dyna	mics CRM	System Administrator 🕜 g° 💩
Query Saved Results New Show	w Save As E Git Columns E Git Properties View	Clear (E Group AND) Clear Group OR Details Ouery	Download Fetch XML Debug	
Look for: Contacts Status Equals <u>Active</u>		Use Saved View:	Active Contacts	V

e) The Advanced Find dialog will be updated as shown below. The search parameters to the view will automatically be added but may differ depending on what you are searching for. In this instance one parameter is automatically listed: **Status Equals Active**. This means that if the Results button was selected now, all active contacts would be searched for and found.



								Microsoft Dyn	amics CRM	Suctor Administrator
F	ILE	ADVA		>						ی میں system Administrator
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		Show			١	/iew		Query	Debug	
Ŀ	ook fo	r: Cont	tacts				v (Use Saved View:	Active Contacts	Y
[× 9	<u>Status</u>			<u>Equals</u>	<u>i</u>	<u>Active</u>	<u>1</u>		
	1	Select								

f) To add additional parameters and to narrow the search click Select (highlighted in the below image)

							Microsoft Dyn	amics CRM	System Administrator 🛛	
FILE	ADVANCED F	FIND							90 A	
Query	Saved Resul	lts î	New	Save	Save As Edit Columns Edit Properties //iew	2 Clear	[{≣ Group AND [{≣ Group OR	Download Fetch XML		
Look fo	or: Contacts			Equals	2	Active	Use Saved View:	Active Contacts		1
	Select									_

- g) A list of fields you can search for will be displayed. The list is divided into two sections:
 - Fields. The top section of the list shows the fields that are part of the record type you are currently searching on. In this example we can see all the fields that form part of a contacts record.
 - **Related.** The bottom section of the list shows all of the entities that are related to the current record type. So in this example we see a list of all record types that are related to a contact.

To use a **Field name** from the list:

h) Select the appropriate field name from the list. A new row will be added to the Advanced Find as is shown below. In this example I have chosen birthday. In the middle drop down I am able to select exactly what the Advanced Find should search for in relation to the birthday. Various options can be chosen and depending on what field has been chosen, different options to search for will be displayed.

5 11 5							Microsoft Dyn	amics CRM	System Administrator 🕫
Query	Saved Views	Results	New	Save	Edit Columns	Clear	[(클 Group AND [(클 Group OR ar	Download Fetch	90 23
Look fo	Show	acts		١	/iew	~	Query Use Saved View:	Debug Active Contacts	V
× :	<u>Status</u> Birthday		Y	Equals On	: 	Act	<u>ive</u> Dose Date		
	<u>Select</u>								

i) Any additional fields can be searched for by choosing **Select**. The above process can then be repeated to narrow down your Advanced Find.



- j) When all of your search criteria has been selected, click **Results** in the ribbon. A list of records meeting the conditions entered will be displayed.
- k) To return to the search terms, select the **Advanced Find** tab heading (highlighted below). The search item previously entered will be redisplayed allowing you to modify the details.



To use a **Related field** from the list.

 Select the appropriate record type from the related section of the list. A new row will be added to the Advanced Find as shown below. This row will be coloured blue to indicate that it is a related record type. In this example, the related field of **Payment Mandate** has been chosen.

							Microsoft Dyna	amics CRM	System Administrator 📀
FILE	ADVAN	ICED FINI	D						go 🛆
Query	Saved Views	Results	New	Save	Edit Properties	2 Clear	[문 Group AND [문 Group OR 로 Details	Download Fetch XML	
Look f	or Contr						Ico Cound View	Active Contacts	
LOOK	or: Conta	ICIS				•	use saved view:	Active Contacts	
~	<u>Status</u>			Equals	i i i i i i i i i i i i i i i i i i i	<u>Active</u>	1		
~	Birthday			<u>On or</u>	After	09/03	/1900		
	Select								
~	Payment I	Mandate:	s (Contact))					
						~			

- m) To set a search term based on the related entity, click **Select** below the blue related row. A list of fields will be displayed and as before the list will be divided into two sections.
 - Fields. The fields section will list all of the fields from the related record
 - **Related.** The related section will list all of the record types that are related to the current record type.
- n) Select the appropriate field or related item from the list. A new row will be added to the Advanced Find dialog. Complete the details of the new row as required, this will differ depending on what has been selected. As shown in the image below, Bank Name has been chosen from the list of Fields in this example.



								Microsoft Dyn	amics CRM	System Administrator 🕜
FIL	E	ADVA	NCED FIN	D						go a
Que	ery	Saved Views	Results	New	Save	Edit Columns	2 Clear	[는 Group AND [는 Group OR 글 Details	Download Fetch XML	1
		Show			1	View		Query	Debug	
Loo	ok fo	or: Con	tacts				~	Use Saved View:	Active Contacts	V
	× :	Status			Equal:	5	Active	2		
	× .	Birthday			<u>On or</u>	After	<u>09/03</u>	/1900		
		<u>Select</u>								
	Υ.	Payment	Mandate	es (Contact	0					
		∨ <u>Bank</u>	Name		<u>Ec</u>	quals	Sa	ntander		
		Selec	<u>t</u>							

- o) To view the results of your search, click **Results** on the ribbon. A list of records meeting the criteria will be displayed. Therefore in this example, the results will show all contacts with a birthday on or after 09/03/1900 and have a Payment Mandate created with a Bank Name of Santander.
- p) It is possible to export the contacts that have been gained from your Advanced Find results by exporting them to Excel via the **Export to Excel** button on the ribbon.

		LIST TOOLS		Microsoft Dynamics CR	N	Syste	m Administrator 🕢
FILE	ADVANCED FIND	CONTACTS				0.00000	90 Q
New Contact	Edit Co	Send Direct Add Email	to Marketing Quic List Campaig	k Mail Merge 🗼 Unfollow Connect - gn - 🏠 Follow	Assign Contacts \iff Email a Link	Run Workflow	Run Report - Contacts
	Records			Collaborate		Process	Data

1.2. EXAMPLES OF ADVANCED FIND SEARCHES

There are many different ways that Advanced Finds can be used to find important data related to your needs. A number of Advanced Finds that are commonly used are highlighted below:



Note. The examples shown below are all dependant on the setup of the system and how this has been completed, therefore they may differ between setups.

• All Active Season Ticket Holders. This advanced find enables you to find all contact information related to every Active Season Ticket Holder on your system.

File	Advanced Find	1			
Quer	Show	New Save As ► Edit Columns ► Edit Propertie View	s Clear Query	Download Fetch XML Debug	
Look	k for: Seat Allocati	ons	~	Use Saved View: [new]	
-	Series	Equals	2014/15 SEASON		
	Select				
-	Booking				
		us <u>Equals</u>	Active;Reserved		
	Select				



The Number of Season Ticket Holders in each block.

	- 4	1511	100	doub naceh			
Look	for:	Seat Allocations			×	Use Saved View:	Number of season ticket holders in each block
	Se	ect					
-	Se	ies -					
	٠	Series	Equals	League 2013-2014			
		Select					
-	50	sking					
	٠	Booking Status	Equals	Active Reserved			
		Select					
	•	Booking Products (Booking)					
		Select					
		 Product Variant 					
		Select					
		Bookable Product					
		 True 	Equais	Series			
		Select					

• Number of seat moves into a particular block for a certain fixture.

Looi	ctors (Se	at Allocations			V	Use Saved View	Prumber of seat moves into Block X for Future X
	Origina	al Seat Allocation	Containa Data				
	Fidure		Equate	Bristol City v Crewe Alexan			
	Block		Equals	WEDLOCK STIND/WEDLOC.			
	Select						
ŀ	Bookin	14					
	 50 	oking Satus	Couets.	Active			
	Sei	Liai					
	+ 1a	akine Products (Book	lina)				
		Select					
	-	Product Variant					
		Select					
		 Bookable Produ 	<u>d</u>				
		 hos 	Cau	in <u>Fielun</u>			
		<u>ient</u>					

1.3. SAVING AND SHARING AN ADVANCED FIND

When you have created an Advanced Find you can save the criteria for future use. For example if you create an Advanced Find to identify bookings for a particular fixture, you can save the search details, and then when you need to report on the next fixture, you can re-use the search once you have adjusted the fixture name.

To save and share an Advance Find view complete the following:

a) On the Advanced Find tab with the search terms visible, select Save As from the ribbon.

FILE	ADVANCED HIM					Hicrosoft Dyna	unies CRM	System Administrator 😨
	Saved Results	New	South	Edit Properties	Q Oear	()E Group AND ()E Group OR ()-Details	Download Petch XML	
~	Wexs Show		20713	Edit Properties		Details Cuery	XML Detion	

b) Choose an appropriate name and click **Save**. The view will be saved and can be accessed from the dropdown below the ribbon on the Advanced Find dialog.

Save as new View	×
Name *	
Description	
Save	Carcel



c) To Share your view with other users, select **Saved Views** from the ribbon of the **Advanced Find** Form.



- d) Select the view you wish to share, and select **Share** from the ribbon.
- e) A new window will open; select **Add user/team** from the navigational panel on the left of the form.
- f) Add the user(s) you wish to share with and click **OK**.
- g) Select the relevant permissions you wish the user to have, and click OK



2. **REPORTING**

Go modules offer a number of Reports which allow organisations to view and manage the data collected in CRM. Many Reports use filters which can be set so that specific data can be chosen to be displayed in the Reports. Report data can be analysed so that feedback and future marketing campaigns can target specific areas.

2.1. ACCESSING REPORTS

To access the Reports that are currently available in your system, the following instructions should be completed.

a) Within CRM select the **Microsoft Dynamics CRM** tab on the navigation bar before choosing **Workplace** from the drop down.



b) Select Workplace on the navigation bar and from the drop down select Reports

A Microsoft Dynamics CRM - 👘 🗤 🗤 🖬	Dubbe ds -	() () () () () () () () () () () () () (System Admittal.
		eman	ali Heisens

c) A new page will open displaying a list of the Available Reports in the system. To open a Report, hover over the applicable Report with your curser, before double clicking the Report to open.





d) A new window will be opened displaying the Report Viewer, some reports <u>will require filters</u> to be set whereas others will automatically generate.

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			8.9
wort filtering California			
Castaria			
Doir (Climat	H Hand St.		
- 200.4	(mail)	Active	
Seed .			
			Ina Payert 3 Clean

2.2. SETTING THE FILTERS OF A REPORT

Upon selecting a Report, it is possible with some of them, to set filters so that the Reports only show specific and targeted information. Filters work in a similar manner to the Advanced Find function where both Fields and Related Fields of content can be filtered to be shown in the Report.



Note. If no filters are set, the Report can still be generated, however all of the data applicable to the selected report will be applied and used in the Report.

The fields and related fields which can be filtered depend on the Report that is being used. For example in the Green 4 Contact Summary Report, the fields and related fields where filters can be selected, will comprise of those in or related to the Contact form.

It is possible to see where the fields and related fields are linked to, by viewing the content record type form name, below the Report Filtering Criteria title, as highlighted below.

Report Filtering Criteria	
Contacts	
🛅 Clear 🛛 📘 🖸 Group AND	Group OR
Select	

To Filter, complete the following instructions within the Report Viewer.

a) With the Report Filtering Criteria view open within the Report Viewer, choose Select to add a filter.

Report Filtering Criteria	
Contacts	
T Clear 🛛 🚺 Group AND 📜 Group OR	
Select	



- b) A drop down will appear, this list may be divided into two sections displaying the following:
 - **Fields.** The top section of the list shows the fields that are part of the content record type of the report.
 - **Related.** The bottom section of the list shows all of the entities that are related to the content record type of the report.
- c) From the drop down choose the applicable filters for the report.

If a **Field** has been chosen it will be possible to change the middle column (highlighted below) controlling what must then be selected/entered in the end column. The value chosen here will determine what data is to be found in the report and whether or not it should equal, contain, not contain, begin or end with (etc.) the value that is entered in the end column.

Depending on the filter and middle column value that has been chosen, the end column may require a value using a Look Up Records to be selected, text to be entered or a further value to be selected.

Report Filtering Criteria				
Contacts				
🛅 Clear 🛛 📘 💽 Group AND	Group OR			
✓ Address 1: City	Equals	l		
Select				

If a **Related** field has been chosen a blue box will appear, and beneath this a further Field or Related field must be selected from the drop down. Again, the middle column must be given an appropriate value which will control the value that is to be entered in the end column

Report Filtering Criteria				
Contacts				
📩 Clear 🛛 📘 🔁 Group AND	Group OR			
✓ Address 1: City	Contains	✓ Lutterworth		
Select				
	Equals	Cash		
Select				

d) To add further filters choose **Select** and repeat the above instructions of choosing filters from the drop down. Multiple filters can be selected to create a chain to filter down the results that are displayed in the Report.



2.3. GENERATING A REPORT

After entering any filters, the Report can then be generated. To generate a report the **Run Report** button within the Report Viewer must be selected. A message will appear showing that the report is generating before the finalised Report can be viewed.

a) Select Run Report in the Report Filtering Criteria area of the Report Viewer.



b) The report will be generated





3. THE DATA CUBE

The Data Cube uses Excel to extract data from CRM so that it can be analysed and used even further. This is especially relevant to sales data such as for particular Fixtures, Series or other types of products. The Data Cube enables users to drill down and dig deep into the data. For example to find out the payments received per Channel on a particular date. The Data Cube is a tool which allows organisations to make even further use of the data that is collected from within CRM.

3.1. CONNECTING TO THE DATA CUBE

This section describes how to connect to the data cube via Excel. The following assumes that the data cube has been deployed and that you have access to the cube. For more information please contact your System Administrator.

To connect to the cube, complete the following instructions:

a) In Excel, from the Data ribbon, select From Other Sources followed by From Analysis Services:



b) The Data Connection Wizard will be displayed.

Connect to Database Enter the information requi	Server	
1. Server name:	entication	
Lice the tellowing	Jser Name and Password	
User Name: Password:		



- c) Complete the following details:
 - Server Name. Enter the name of the database server. This information will be provided by your System Administrator.
 - Log on Credentials. Select the Use Windows Authentication option unless otherwise advised by your System Administrator.
- d) When the details are complete, select **Next** to continue.
- e) The Select Database and Table dialog will be displayed:

Select Select	Database	and Table and Table/Cube which cor	ntains the c	data you want.
<u>S</u> elect the	e database tha	t contains the data you w	ant:	
g4_cube	et to a specific	a be or table:		
Name	Description	Modified	Created	Туре
CUB		9/3/2013 10:37:03 AM		CUBE
		<u>,</u>		

- f) Select the g4_cube database and the relevant cube as shown above. Select Next to continue.
- g) The Save Data Connection File and Finish dialog will be displayed:

Case Data	Connection E	in and finish			254
Save Data	Competence Internation	Re allou Fielden			10
Enter a name save.	and description f	or your new Data Co	nnection file, an	d press Finish to	I
File Name:					
greg-pc g4_cub	e CUBE.odc				Browse
		Save parried	d'inflie.		_
Description					
(To help others	understand what	your dats connection	n points to)		
(To help others	understand what	your dats connection	n points to)		
(To help others Friendly Name: greg-pc.g4_cub	e CUBE	your data connectio	ri points to)		
(To help others Friendly Neme: greg-pc.g.4_cub Search Keyword	e CLEE	your dats connection	n poents to)		
To help others Friendly Name: grog pc g4_cub Search Keyword	e CLEE a: spt to use this file	your dats connection	n points to)		
To help others Friendly Nemes grag-pc-g4_cub Search Keyword Always other Excel Services:	e CLBE is: spt to use this file Authentication	your dats connection	r points to)		

h) Finally, complete the settings in the File Name and select Finish.



Note. When you have added and saved the data cube connection settings, you will be able to re-connect using the **Existing Connections** option on the **Data** ribbon. It will be necessary to re-add the data cube connection every time you start a new pivot table (new sheet) within the workbook.



3.2. BASIC CONCEPTS

The Data Cube uses pivot tables within Excel to display data extracted from the CRM database. The data displayed is not real time data but instead is a snap-shot of data taken at a designated time. Contact your System Administrator if you wish to understand when this is. When a snap shot of data is taken the data is processed and aggregated on the basis of patterns within the data.

When the connection is made to a data cube, a blank grid for the pivot table will be added and the task area will be displayed on the right-hand side of the window as highlighted below:



The Task Area is divided into two sections:

• Show fields. The top half displays a list of fields that are available to add to the report. The fields are arranged into subsets, for example Bookings, Contacts and Payments. A full list is shown below:



Note. Selecting fields from different subsets could result in extraneous data.

PivotTal	ole Fields	-
Show fields:	(All) 🔻	÷
	(All)	
Un:	Black Out	
	Booking Threads	
🖻 🚺 KPIs	Bookings	
4 🔲 Activity	Contact Emails	
	Contact Mobiles	.
	Contact Telephones	
🔺 📃 Activity	Contacts	
Mir	Loyalty	
4 🗖 Advance	Payments	
	Product Payments	
	Product Sales	
	ance renodisegment	



- The lower half of the Task Area displays the fields that have been added to the report. The area is divided into 4 areas as described below. The fields should be dragged and dropped into the relevant area from the field list.
 - **Filters.** This area contains the fields that have been added to the report to allow filtering of the table. For example you may add the Year field to allow you to filter for a single year, rather than looking at all historical data.
 - **Columns.** This area contains the fields that determine the arrangement of data shown in the columns of the pivot table. Multiple fields can be added.
 - **Rows.** This area contains the fields that determine the arrangement of data shown in the rows of the pivot table. Multiple fields can be added.
 - **Values.** This area contains the fields that determine which data are presented in the cells of the pivot table. For example you may select to display the number of contacts or number of bookings.

Drag fields between	areas below:
FILTERS	COLUMNS
■ ROWS	Σ VALUES



3.3. EXAMPLE REPORTS

The following section describes how to create some example reports using the Green 4 Ticketing Data Cube. The list of reports provided in this guide is not exhaustive, and we strongly advise that after creating the examples you investigate the full scope of the data.

CONTACTS IN THE DATABASE

To create a rolling count of contacts added to the database over time:

- a) Select Contacts in the Available Fields area in the Task Area.
- b) From the Σ Contact heading drag the Contacts and Contacts Running fields into the Σ Values area:



c) Next drag the Year - Quarter - Month field (listed under Take Date) into the Rows area:

	Fields * *
Show Kelds: Con	tacto + O +
≠ □ Gerider □ Geruler	
a 📑 Take Date	Months.
T (E) THEN T	ALL CONTRACTORS AND ALL CO
1 Un Lets	
a 🛅 Variant Type	1993-1993 - HE
U.I. Wattern 7	Aber.Asusui
* III Venue	
() +erus	(F)
Diag fields between	n areas below
T PRITERS	# COLUMNS
	T. Values ·
	_
	C VALUES
I ROWL	
Tear - Quart. *	Contacts *



d) The following basic report, which illustrates the number of contacts added per year and the total number of contacts in your database will be displayed:

	А	В	С
1	Row Labels 🛛 🔻	Contacts	ContactsRunningTotal
2	∃ Calendar 2013	10,450	10,450
3	∃ Calendar 2014	3,214	3,214
4	Calendar 2015	808	808
5	Grand Total	14,472	14,472

e) To drill-down into the data, for example to view the contacts added each month, click on the + symbol alongside the year. This will show the data split into Quarters of the year. To drill further select the + symbol next to the individual Quarters, this will show the months that make up the selected quarter. To drill even further the + symbol can be chosen once more to show the individual weeks of the month and again the + symbol can be selected to show the individual days of the chosen week.

d.	A		¢ .
1	Row Labels	Contacts	ContactsRunningTotal
ż	# Calendar 2013	10,450	10,450
1	= Calendar 2014	1,214	3,214
4	= Quarter 1, 2014	1,075	1,075
5	iii January 2014	492	10,942
6	Week 1, 2014	11	17
7	Wednesday, January 01 2014	11	11
8	Thursday, January 02 2014	20	20
2	Friday, January 03 2014	17	17
10	Saturday, January 64 2014	7	7
11	Sunday, January 05 2014	16	16
12	# Week 2, 2014	180	186
12	= Week 3, 2014	175	175
54	≓Week 4, 2014	29	29
15	#Week 5, 2014	25	25
16	# February 2014	214	11,156
17	* March 2014	369	11.525
18	= Quarter 2, 2014	627	622
19	= Quarter 3, 2014	1,202	1,202
20	III Quarter 4, 2014	315	315
21	#Calendar 2015	808	808
22	Grand Total	14,472	14,472

f) To filter the data, for example to only view the number of contacts added during the current calendar year, select the arrowhead alongside the **Row Labels** column heading in the pivot table. From the dialog that is displayed, select the data that you are interested in before selecting **OK**:

Sel	lect field	10,450
Yn	ar 🖉	3,254
61	Sect A to 7	1,075
÷.	part of the second s	622
Ņ,	Sert 2 to A	1,202
	More Sart Options	815
7	Char This frint "Year"	808
	Label Filters +	14,472
	Salas filters +	
	Search Year	
	A Detect All	
	ili: 🛠 Calendar 2010	
	ili (2) Catendar 2011	
	ULM Calendar 2012	
	(i) (ii) Calendar 2013	
	II. St. Calendar 2014	
	US Colember 2016	
	ili 🐼 Calendar 2017	
	UL SE Calendar 2018	



VIEWING THE DATA AS A CHART

To view the report you have created as a chart carry out the following:

a) Select the **Row Labels** heading in the pivot table.

	А	В	С
1	Row Labels 🛛 💌	Contacts	ContactsRunningTotal
2	∃ Calendar 2013	10,450	10,450
3	∃ Calendar 2014	3,214	3,214
4	∃ Calendar 2015	808	808
5	Grand Total	14,472	14,472

- b) Press F11 on the keyboard.
- c) The data will be displayed in chart format in a new sheet of the workbook.





Note. The chart will automatically update when the data displayed in the corresponding pivot table is updated.



CONTACTS BY GENDER

To further drill down into the data and view the number of contacts based on gender add the **Gender** field to the **Rows** area:

PivotTable Fi	elds 👻 🗙			
Show fields: Contac	ts 🔻 🗘 🔻			
✓ Gender ✓ Gender				
✓ Take Date ▷ ✓ Year - Quant ▷ Image More Fields ▷ Image Sets	rter - Month			
✓ ■ Variant Type ○ Variant Type	e.Variant			
Venue	-			
Drag fields between a	reas below:			
T FILTERS				
	Σ Values \bullet			
■ ROWS	Σ VALUES			
Year - Quart 🔻	Contacts 🔻			
Gender 🔻	ContactsRunn 🔻			
Defer Layout Upda	te UPDATE			

The resulting report will illustrate the number of contacts based on gender that have been added to the database during the time period selected:

	А	В	С
1	Row Labels 🛛 🔻	Contacts	ContactsRunningTotal
2	🗄 Calendar 2013	10,450	10,450
3	Female	17	17
4	Male	73	73
5	Unknown	10,359	10,359
6	Unknown	1	1
7	🗄 Calendar 2014	3,214	3,214
8	Female	2	2
9	Male	9	9
10	Unknown	3,203	3,203
11	🗄 Calendar 2015	808	808
12	Female	1	1
13	Male	6	6
14	Unknown	801	801
15	Grand Total	14,472	14,472



CONTACTS BY AGE

To further segment the data you could add age categories to the report (drag Age into the Rows area):



The resulting report will illustrate the number of contacts based on gender and age that have been added to the database during the time period selected:

	А	В	С
1	Row Labels	Contacts	ContactsRunningTotal
2	🗄 Calendar 2013	10,450	10,450
3	Female	17	17
4	0 to 9	4	4
5	10 to 19	3	3
6	30 to 39	1	1
7	40 to 49	1	1
8	90+	1	1
9	Unknown	7	7
10	Male	73	73
11	0 to 9	11	11
12	10 to 19	10	10
13	20 to 29	1	1
14	30 to 39	1	1
15	40 to 49	10	10
16	50 to 59	4	4
17	60 to 69	2	2
18	70 to 79	1	1
19	Unknown	33	33



3.4. PAYMENTS TAKEN PER CHANNEL

To view the payments taken by each channel over time carry out the following:

- a) Select **Payments** in the Available Fields area in the Task Area.
- b) From the Σ Payments heading drag the Payment into the Σ Values area

now neutre (neu	- 112	
✓ Σ Payments		100
- Paymana	COMPR.	
 E Product Pays Amount 	nents	
No Of Per	opte:	
 E Froduct Sales 		
🗌 Attesdan	ce.	
Dave Arbo	f Quantity	100
C) Days Man	ior.	
Drag fields between	areas below:	
₩ FILTERS	II COLUMNS	
= ROWS	T VALUES	
L	Payenin	-

c) Next drag the Month of Year and Date fields (listed under Use Date > More Fields) into the Rows area

PivotTable Fields 🔹 👻		
Show fields: (All)	• Ø •	
 ✓ Use Date ▷ Year - Quar ✓ Date ○ Day Of N ○ Day Of C ○ Day Of V ○ Day Of V ○ Day Of Y ○ Day Of Y	ter - Month - D Month Quarter Veek Year te yOfWeek onths vek	
T FILTERS	COLUMNS	
■ ROWS Month Of Year ▼ Date ▼	∑ VALUES Payment ▼	



d) Next drag the Channel Name field (listed under Channel) into the Columns area



e) Finally, drag the Year column (listed under Use Date > More Fields) into the Filters area





f) The Task Area should appear as follows:

Drag fields between areas below:		
▼ FILTERS		
Year 🔻	Channel Name 🔻	
ROWS	Σ VALUES	
Month Of Year 🔻	Payment 🔻	
Date 🔻		

g) At the top of the pivot table set the filter for the year you are interested in viewing data for – for example the current year:



h) The resulting report will display a list of the payments received per channel per date. Note any values shown in brackets, e.g. (500.50) represents a negative value.

Year		Calendar 2013	.7				
Payment Row Labels	*	Column Labels Boardroom	.7	Bar	POS	Kiosk	Grand Total
∃Month 1		259	.00	8,328.20	104,109.20	12,470.10	125,166.50
Tuesday, January 01 2013				249.10			249.10
Wednesday, January 02 2013					1,533.00		1,533.00
Thursday, January 03 2013					520.50		520.50
Friday, January 04 2013				894.00	19,882.50		20,776.50
Saturday, January 05 2013					3,344.60		3,344.60
Monday, January 07 2013					3,115.30		3,115.30
Tuesday, January 08 2013		183	.80	545.10	1,719.00	1,355.50	3,803.40
Wednesday, January 09 2013					7,107.00		7,107.00
Thursday, January 10 2013					1,129.00		1,129.00
Friday, January 11 2013				1,393.90	4,795.50	8,153.70	14,343.10
Saturday, January 12 2013				787,40	533.00		1,320.40
Monday, January 14 2013					857.80		857.80
Tuesday, January 15 2013					985.00		985.00
Wednesday, January 16 2013				91.20	(500.50)		(409.30)
Thursday, January 17 2013					501.00		501.00
Friday, January 18 2013				343.70	(183.00)		160.70
Saturday, January 19 2013				1,481.50	3,295.50		4,777.00
Sunday, January 20 2013		75	.20	1,740.40	8,790.00	2,960.90	13,566.50



3.5. TICKET SALES PER FIXTURE

To view the tickets sales for a particular fixture:

a) Select Product Sales in the Available Fields area in the Task Area.



b) From the Σ Product Sales heading drag the People and Quantity into the Σ Values area



c) Next drag the Product Type, Product and Variant fields into the Rows area

PivotTable Fields • *			
Show fields: Produ	ct Sales 🔻 🔅 🔻		
 ▲ Product Category ▷ Parent Category ▲ More Fields △ Category Name ▲ Product Variant ✓ Variant 			
Drag fields between areas below:			
T FILTERS	III COLUMNS Σ Values ▼		
■ ROWS Product Type ▼ Product ▼ Variant ▼	Σ VALUES People ▼ Quantity ▼		



d) Finally, drag the **Fixture** column into the **Filters** area

PivotTable Fields 🔹 💌				
Show fields: Product Sales 💌 😫 💌				
Postcode				
▲ 📄 Entry Time □ Entry Time	Name			
 ✓ Fixture ✓ Fixture Season 				
⊿ 📃 Gender □ Gender				
Initial Advance Period Trag fields between areas below:				
T FILTERS				
Fixture 🔻	Σ Values \bullet			
ROWS	Σ VALUES			
Product Type 🔻	People 🔹			
Product •	Quantity 🔹			
Variant -				

e) The Task Area should appear as follows:

Drag fields between areas below:			
T FILTERS			
Fixture 🔻	Σ Values \bullet		
■ ROWS	Σ VALUES		
Product Type 🔻	People 🔻		
Product 🔻	Quantity 🔻		
Variant 🔻			



f) At the top of the pivot table set the filter for the fixture you are interested in viewing data for – for example Crawley Town v Wolverhampton Wanderers in the image below:

А		В		
Fixture	Crawley Town v Wolverhampt	on Wanderers (Home Tickets Only) 🔄		
		Search Fixture		
Row Labels	People	Crawley Town v Wolverhampton Wander 🔺		
■ Fixture	 	Crawley Town v Woodbridge Town		
Academy	_	Crawley v Brighton & Hove Albion - Frier		
Adult		Crawley v Milwall - Friendly		
🗏 Away Comps		Crewe Alexandra Crewe Alexandra V Crawley Town		
Adult		Dagenham and Redbridge		
Away Directors		damon test		
Adult		Doncaster Rovers		
■Community		< >		
Adult		Select Multiple Items		
Directors Box Only				
Adult		OK Cancel		
Directors Guests				

- g) Next, further filter the report to show only the product type Fixture. To set the filter, select the arrow head next to the Row Labels column heading.
- h) Select **Product Type** in the drop down list at the top of the filter conditions dialog.
- i) Remove all selections except for the one alongside **Fixture** at the bottom of the dialog before clicking **OK**.

A A		¥.
 Fixture 	Crawley Town v Wolvert	hampton Wanderers (Home Tickets Only) 🤄
2 3 Bow Laberts	- respin	
Subject Field		1,870
Product Type	[H] [H]	34
#1 504 #167	100	34
II Sovi Piele		26
Allow Sant Options		36
The Complete From The Ball by	r	19
Labor Fritum	*	40
Value Filture		40
Intern Frenket Trees	000	82
Constant and		12
A CHORN AND		40
i iz hitari		572
a Chinan		560
181 ET Steknovet-		2
ili [] Meirrowe		4
		400
		116
		63
- 04	Carton	51

j) The resulting report will display a list of product purchases of type fixture for the selected fixture:

1	A.	In the second on the second second	5
1	Fixture	Drawley Town v Wolverhampton Wanderers (Home Tickets Only)	
2			
3	Now Labels	3 People	Quantity
+	III Flattario	3,826	3,826
\$	= Academy	34	34
6	Adult	34	34
7	Away Comps	36	36
8	Adult	36	26
+	# Away Directors		·
10	Adult		
11	= Community	40	40
12	Adult	40	40
13	Directors Box Only	32	32
54	Adult	32	32
15	#Directors Guests	49	45
35	Adult	49	-49
17	= East Stand Averay Seat	572	\$72
18	Adult	566	566
19	Junior Under 18	1	2
30	Carer	4	- 4
21	= East Stand Home Seat	498	498
22	Adult	138	335
23	Junior Under 18	63	63
24	Carstr	45	-46
23	Seminar 63+	51	51



3.6. FOOD & BEVERAGE SALES PER TERMINAL PER FIXTURE (NUMBER OF PRODUCTS)

To report on the food and beverage product sales per terminal carry out the following:

a) Select Product Sales in the Available Fields area in the Task Area.

PivotTable Fields		+ ×	
Show fields: Product Sales 🔻		•	\$ v

b) From the Σ Product Sales heading drag the Quantity and Price into the Σ Values area

PivotTable Fields • *		
Show fields: Produc	tt Sales 🔻 😫 🔻	
Converted Quantity Days Advance Discount Games Initial Days Advance Payment Allocated People ✔ Price Product Count Promo ✔ Quantity		
Drag fields between a	reas below:	
T FILTERS	III COLUMNS ∑ Values ▼	
■ ROWS	∑ VALUES Quantity ▼ Price ▼	



c) Next drag the Fixture, Hierarchy (from under Terminal) and Product into the Rows area

PivotTable Fields 🔹 💌	
Show fields: Produc	t Sales 🔻 😫 🔻
Gender	
 Initial Advance Period Initial Advance Period.Period 	
Initial Advar	nce Period.Segm
Product On Sale	
✓ Product	
Product Type	e T
Report Cate	gory
Product Category	
Drag fields between areas below:	
T FILTERS	
	Σ Values \bullet
ROWS	Σ VALUES
Fixture 🔻	Quantity 🔻
Hierarchy 🔻	Price •
Product -	

d) The Task Area should appear as follows:

Drag fields between areas below:	
FILTERS	
	Σ Values \bullet
	•
ROWS	Σ VALUES
Fixture 🔻	Quantity 🔻
Hierarchy 🔻	Price 🔻
Product •	



- e) Next, it is necessary to filter the data to display the fixture of interest:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Fixture** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the fixture of interest at the bottom of the dialog before clicking **OK**.



- f) Next, it is necessary to filter the data to display the terminals used to sell F&B only:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Till Group** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the till groups used to sell F&B:

1	A	
1	Row Labels	3
Se	lect field:	
Til	l Group	
₹↓	Sort A to Z	
Z↓ Sort Z to A		
	More Sort Options	
K	Clear Filter From "Till Group"	
	Label Filters	>
	Value Filters	•
	Search Till Group	<u> </u>
1	E Kiosk 01	
	Hiosk 02	
	E Viosk 03	
	E Kiosk 04	
	E Kiosk 05	E
	Kiosk 06	
	Kiosk 07	45
	Klosk 08	
	H IN KIOSK U9	
		-
	OK	Cancel



g) The resulting report will display a list of the products sold via the selected till groups. The report will display the number of product sales and the total value of the products sold (using the listed selling price and not necessarily the price actually paid):

Row Labels	T Price	Quantity
St Helens Vs Leeds Rhinos	24,820.50	8,654
🗄 Kiosk 01	4,686.80	1,650
Bottled Beer 1-2-4-6-8	80.50	18
Shirley's Steak & Saints Gold Pie	102.30	31
Kiosk Burgers	102.30	31
Kiosk Fosters	1,226.50	377
Programmes	15.00	5
Kiosk Hot Dog	488.40	148
Meal Deal 1	215.00	37
Cottoms Hotpots	108.90	33
Misc	64.00	14
Kosk Crisps & Chocolate	239.00	169
Kiosk Saints Gold	1,163.90	344
Kiosk Softs	253.00	129
Kiosk Hot Drinks	628.00	314
🗄 Kiosk 02	5,686.00	1,883
Meal Deal 2	215.00	41
Bottled Beer 1-2-4-6-8	86.70	20
Shirley's Steak & Saints Gold Pie	112.20	34

3.7. FOOD & BEVERAGE SALES PER TERMINAL AND OPERATOR (REVENUE)

To report on the food and beverage revenue per terminal and payment type carry out the following:

a) Select **Payments** in the Available Fields area in the Task Area.



b) From the Σ Payments heading drag the Payment into the Σ Values area





c) Next drag the **Hierarchy** (from under **Terminal**), **Operator** and **Payment Method Name** into the **Rows** area



Next you need to select the fixture date as the filter. To achieve this drag Date (listed below Take Date > More Fields) into the Filters area.

PivotTable Fields 🔹 👻	
Show fields: Payme	nts 🔻 🗘 🔻
 ▲ Take Date ▷ Year - Quar ▲ More Fields ✓ Date Day Of N Day Of Q Day Of Y FiscalDat FiscalMat FiscalWat 	ter - Month - D Month Quarter Year te yOfWeek onths teks
T FILTERS	
Date 🔻	
ROWS	Σ VALUES
Hierarchy 🔻	Payment 🔻
Operator	
Payment Me 🕈	



e) At the top of the pivot table set the filter for the fixture date you are interested in viewing data for - for example August 30th 2013 in the image below:



- f) Next, it is necessary to filter the data to display the terminals used to sell F&B only:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Till Group** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the till groups used to sell F&B before selecting **OK**:

4	A	
1	Row Labels	,Τ
Sel	ect field:	
Till	Group	1.00
41	Sort A to Z	
ZI	Sort 7 to A	
A+	SOIL 2 TO A	
	More Sort Options	
X	Clear Filter From "Till Group"	
	Label Filters	
	Malue Ellipse	
	value rillers	
	Search Till Group	P -
1	Kiosk 01	
_	Kiosk 02	
	H Kiosk 03	
	Hiosk 04	
	E Kiosk 05	81
	H Klosk 06	
	Klosk 07	NE
	Erel Kinsk 09	
	H Kosk 1.5	100
	IE.	75
	OK	Cancel
	UN	caricer

g) The resulting report will display a breakdown of the payments taken by operators using the selected terminals:

Date Frida	y, August 30 2013	
Row Labels . 7 Payment		
=Klosk 01	4,402.40	
Bar	1,897.10	
Cash	1,882.10	
= kicsk	2,520.30	
Cash	2,529.30	
Credit		
#Riosk 02	6,980.00	
+ bar	3,800.40	
Cash	1,030.40	
Hiosk	1,179.60	
Cally	1,179.60	
= Klosk 03	2,202.00	
iii bar	454.80	
Cash	454.80	
#kiosk	1,747.20	
Cash	1,747,20	
# Klosk 04	1,309.20	
- Bar	1, 309, 20	
Cash	1,309.20	
an influence of the	3 334 60	

End of Document