

Revenue Summary Report

Last Modified on 08/20/2019 4:39 pm EDT

The **Revenue Summary** report displays revenue organized by Category 1, 2, and 3.

From the *Reports* menu > *Transactions / Financials*, the Revenue Summary report can be found under the *Recommended* tab.

- ★ View and assess revenue by Class/Event Location.
 - ★ Compare revenue collected with related enrollments.
 - ★ Analyze discounts given over a specified date range.
-

Search Criteria

Use the Search Criteria to narrow results down to the payments you want to work with.



Leaving a field blank is the same as saying "all".

Report: Revenue Summary

← RETURN ✓ SUBMIT

Search Criteria 🔍 Favorites 📌 Save Favorites ✕ Refresh ?

Do you want to limit the report to certain locations? ?

- No, show me all transactions
- Limit results to fees from certain locations
- Limit results to payments from certain locations

Class/Event Location

- CCD
- DVD
- EDU

Class Session

Category 1

Select Class Search 🔍 Clear

Date Paid from 12/1/2019 📅 through 12/7/2019 📅

The criteria selected will return all revenue paid from 12/1/2019 to 12/7/2019.

Display Settings

Before submitting for results, you can adjust the *Display Settings*:

- Add a Subheading
- Show Refunds
- Report format

The Report Results

Revenue Summary						
12/1/2019 - 12/7/2019						
Cat1	Cat2	Cat3	Class/Event	Enrollment	Discount	Amount
Dance						
			--No Class/Event Name--	0	0.00	150.00
			Class in Concord	1	0.00	100.00
			Class in Davidson	2	0.00	150.00
			Cat3 Subtotal:	3	0.00	400.00
			Cat2 Subtotal:	3	0.00	400.00
			Dance Subtotal:	3	0.00	400.00
Totals:				3	0.00	400.00
					Revenue*:	400.00

*Due to Partial Payments applied to fees, Revenue for time period selected may not total Original Amount.



When a payment is linked to a fee that has a class selected in



transaction details, the class enrollment will populate in the Enrollment column.
