



AGENT REPORTS PORTAL INSTRUCTIONS

All Vermont Lottery agents can now access sales, inventory, orders and transactions reports through the Vermont Lottery Agent Reports Portal, a secure web-based application. Agents can download sales and inventory reports in various formats (Excel, PDF, Word, Crystal Reports) as well as export transaction, inventory and order data as comma-separated (CSV) files. This capability will allow you or your accounting staff better ease of use, and to have the data as needed.

This document explains how to set up your account, add users (*chain headquarters only*), download reports and export data. Responses from lottery agents who've done some prior testing have indicated that it is an easy process.

HOW TO SET UP YOUR ACCOUNT

On the vtlottery.com website click RETAILERS in the top blue menu bar. On this page click AGENT REPORTS PORTAL. This will open up a new tab where you will set up your account.

THIS IS VERY IMPORTANT FOR SUCCESSFULLY SETTING UP YOUR ACCOUNT.

1. Add vlc.webmail@vermont.gov to your address book/contact list.
2. Individual Chain store accounts will be set up by someone in YOUR COMPANY'S central office. That person will create an account for themselves first. After completing that they may create an account for each chain location. The Lottery Staff cannot help you create an account.
3. Individually Owned Stores can set up their own accounts by following the steps listed below.
4. If you own more than one store and would like to have all your stores data consolidated onto one report (still showing each store's results), contact the Lottery **before** setting up your account so we can cause this consolidation to occur. If you do not want them consolidated, then proceed with the instructions below for each location. A separate email address will be needed for each location.

You will need:

- An active email address
- The taxpayer identification number for the store – the last 4 digits
- Your lottery agent number – visible on your lottery terminal or reports

On the main screen click CREATE AN ACCOUNT and enter the information needed in each field.

After you click the CREATE ACCOUNT button, an email will be sent to the email address you entered. Open that email and click the link provided to confirm and activate your account. Once completed, you can log in and begin running and downloading your agent reports.

Use your email address and password to log in to your account.

HOW TO ADD OTHER USERS

(Chain Headquarters Only)

The Agent Portal allows chain headquarters accounts to grant access to subordinate users on a store-by-store basis. This allows store managers to see data for their specific store, while the chain headquarters account is able to see data for the entire chain of stores.

To add a subordinate user, select MODIFY SUBORDINATE ACCOUNT in the menu on the left. Click the CREATE ACCOUNT button. Using the drop-down, select the agent number you would like to give the employee access to and then enter the employee's email address. After you click the CREATE button, an email will be sent to the employee's email address you entered. The employee will need to open that email and click the link provided to activate their account.

HOW TO DOWNLOAD REPORTS

Select REPORTS in the menu on the left. Choose between Instant Inventory and Sales reports, and then pick the report to run.

For Chain Headquarters: When running reports, if you do not select an individual agent your report will include all of your agents.

You must enter a date range for each report and the document type that you would like it presented in (EXCEL, PDF, WORD, or CRYSTAL REPORTS).

A few important points about date ranges:

1. If the current week has not completed, you will see week-to-date inventory results as of that date and time. Sales results will be as of the previous day.
2. If you choose dates that are different from our normal weekly accounting period (Sunday – Saturday), the results will not match the sales and settlement information on your Weekly Invoice.
3. The maximum period allowed for the Agent Activity Sales Detail report is one week.

REPORTS AVAILABLE FOR DOWNLOAD

Activations and Settles: provides a list of activated and settled instant games by store during the selected date range, including the game name and number, book number, date activated/settled, individual book value and total value of all books activated and returned.

Agent Inventory Status: provides the status of instant game inventory for the week selected, including game name and number, book number and value, number of tickets, price point, manifest number, book status and date received/activated/settled.

Agent Inventory Status XL: provides the status of instant game inventory for the week selected, including game name and number, book number and value, number of tickets, price point, manifest number, book status and date received/activated/settled/returned.

Instant Returns Detail: provides a list of any returned instant books by store during the selected date range, including the game name and number, book number, date returned, ticket range, number and value of tickets returned, commission and manifest number. This report can be run for a particular game or all games.

Returned Tickets: provides a list of any returned instant books by store during the selected date range, including the game name and number, book number, price point, range and value of tickets returned and manifest number.

Agent Activity Sales Detail: provides a breakdown by store of game activity during the selected date range, including sales, cancels, returns, commissions, bonuses, cashes, adjustments and net amount.

HOW TO EXPORT DATA

This is another way to obtain accounting (Transaction) and inventory (Inventory and Orders) data as a comma-separated (CSV) file.

Select DATA EXPORT in the menu on the left. Choose Transactions, Inventory or Orders. For each export you must enter a date range.

DATA AVAILABLE FOR EXPORT

Transactions: provides transactional data by store for the selected date range, including sales, cashes, cancels, adjustments, commission and instant settlements by day.

Inventory: provides a list of settled instant games by store for the selected date range, including game name and number, book number, price point, number of tickets, manifest number and date book received/activated/settled/returned.

Orders: provides a list of every book of instant tickets included in orders for the selected date range, including manifest number, UPS tracking number, game name and number, price point, cost per book and date it was ordered, filled, shipped and received.

CONTACT US

If you have trouble setting up your account or running any of the reports please call the hotline number 1-877-809-8062. These calls are answered 24 hours a day.