

Participants by Service Report

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Introduction

The 'Participants by Service' report is used to generate a list of participants who have registered for one or more service(s). Participants will be listed only once in the report. The report can include Participant level fields that are linked to the service(s), and account holder information. Users with full administrative access can edit custom field information provided by participants. An option to send email to participants is also available. The report can be exported in CSV, Excel, XML, and PDF formats.

Club/Clinic Staff

Anytown Rowing Club - Anytown Crew

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Instructions

In order to generate a report, use the following instructions:

1. Log into your [RegattaCentral](#) account and click the '**Participants by Service**' link located in the **Club/Clinic Staff** box
2. Select the desired **Service Period** from the drop down menu
3. Select the **Service Category** listed in the gray boxes

2015 - 2016

select a 'Service Period'

select a 'Category'

SKU	Title	Begins	Days/Times	Cost	Registrations	Est. Income
<input type="checkbox"/>	3638-58	Boy's Middle School- Summer	Jun 1, 2015	\$90.00	1	\$90.00
<input type="checkbox"/>	3638-56	HB Crew Varsity - Fall Season	Sep 1, 2015	\$500.00	1	\$500.00
<input type="checkbox"/>	3638-55	HB Crew Varsity - Fall Season TRYOUTS	Sep 1, 2015	\$500.00	0	\$0.00
<input type="checkbox"/>	3638-57	Novice Boys- Fall Season	Aug 31, 2015	\$100.00	2	\$200.00
<input type="checkbox"/>	3638-52	Novice Girls-Fall Season	Aug 24, 2015	\$550.00	1	\$550.00
<input type="checkbox"/>	3638-53	Varsity Boys- Fall Season	Aug 24, 2015	\$200.00	2	\$400.00
<input type="checkbox"/>	3638-59	Varsity Girls-Fall	Aug 24, 2015	\$500.00	1	\$500.00

Options

- Include Custom Fields
- Include account holder's contact information [more...](#)
- Display only participants registered for **all** selected services [more](#)

- a. 4. Select the check box to the left of the **Service(s)**. Multiple services can be selected for inclusion in the report

2015 - 2016

can select Services from different Categories to run together

Camps & Clinics Learn-To-Row (1) Memberships Programs & Classes Racks & Storage Teams & Groups (1) Trip Fees Volunteering

<input type="checkbox"/>	SKU	Title	Begins	Days/Times	Co#	Registrations	Est. Income
<input checked="" type="checkbox"/>	3638-41	Learn to Row II	Apr 1, 2015	Sa 14:00-15:00	\$150.00	5	\$750.00

Options

Include Custom Fields

Include account holder's contact information [more...](#)

Display only participants registered for **all** selected services [more](#)

- a.
5. Select the **Options** you wish to include in the report:
 - a. **Custom fields:** Selecting this option will generate a column for each Participant level custom field that is linked to the service(s). Selecting this option will also trigger the 'Edit' link to appear to the left of the participant's name. The 'Edit' link can be used to update or add information to custom fields.
 - b. **Account Holder contact information:** Selecting this option will include columns in the report for the account holder's email, phone number, city, state, and zip code. In some cases the account holder is the participant, so this information will most likely be the same as the Participant information. In cases where a parent has registered a child the account holder information is usually different.
 - c. **Participants who are registered for all/selected services:** This option can be used when generating a report for 2 or more services. When this option is selected the report will only include participants that have registered for all of the selected services. For example, this option may be helpful for clubs who are interested in viewing a list of only the members who have participated in Session 1, Session 2, and Session 3 of a Learn-To-Row program.
6. Click the 'Generate Report' button
7. Once report generated, you can edit athletes registration information and complete any fields you designated as 'Staff' when setting up the service. (Example: A 'Staff' level field asking if participant turned in additional forms. Can update status of participants form in the 'Staff' field through 'edit'. Can also update any other information.
8. **Send Email-** You can send an email to all participants in the services selected by selecting the 'Send Email' link
9. **Exporting Information-** You can export the participant information to Excel, CSV, HTML and PDF.

← click here 'Send Email' to participants. Editor will appear allowing you to create text.

	Service	Ledger Code	Group Code	Last Name	First Name	Affiliation	Qty	Birthdate	Gender	Email	Demo Waiver Terms	5. Demo PDF Download	Athlete Cell Number	Demo Email Requirement
Edit	Novice Boys-Fall Season			Jones	Amanda	Anytown Rowing Club	1	1991-01-26	F	amanda@regattacentral.com	I have read and agree to the above terms	I was able to download the waiver	614-555-5555	a@regattacentral.com
Edit	Novice Boys-Fall Season			Jones-Test1	Amanda	Unaffiliated (USA)	1	1992-02-21	F	amanda@regattacentral.com	I have read and agree to the above terms	I was able to download the waiver	111-111-1111	

Export options: CSV | Excel | XML | PDF ← Select an option and click to export

a.

Support

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- 614-360-2922

Email

- English: support@regattacentral.com

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