Reports: Registrations by Service Report

> ✓ Note: These instructions are for club administrators who have staff access to their club's management resources

Overview

The 'Registrations by Service' report is used to generate a list of participants who have registered for one or more service(s). A participant may be listed several times if they have registered for several services. The report can include Item 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.

How to view and edit report

1. Login using the '**Login**' at the top of the RegattaCentral homepage.

   a. If you do not have an account, need to reset your password, or username please follow the instructions in '**How to Create an Account**' above.


2. To be given administrator access to a team you will need to contact the individual in charge of your club's RegattaCentral account or your regatta central account manager.

3. After Logging on to RegattaCentral your club will be located on the lower left of your dashboard below regatta calendar. Click on **your club name.**
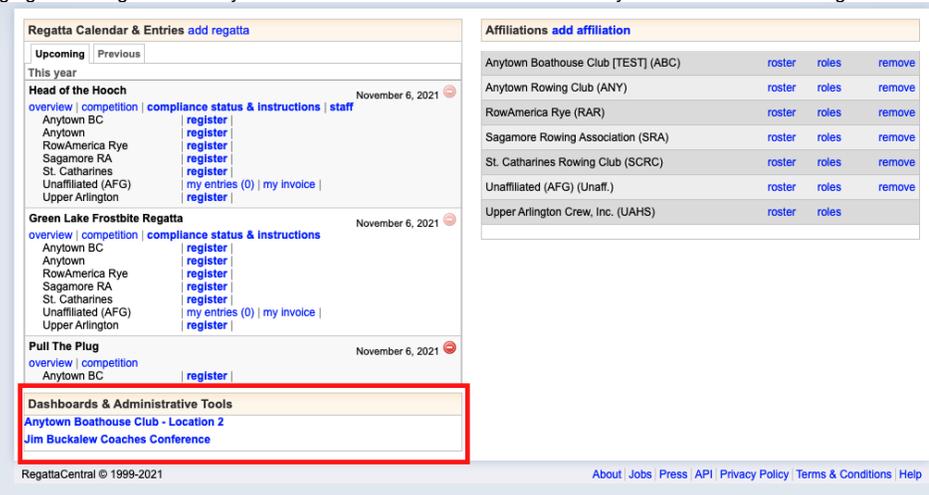
   a.

4. Your club administration page will then open.
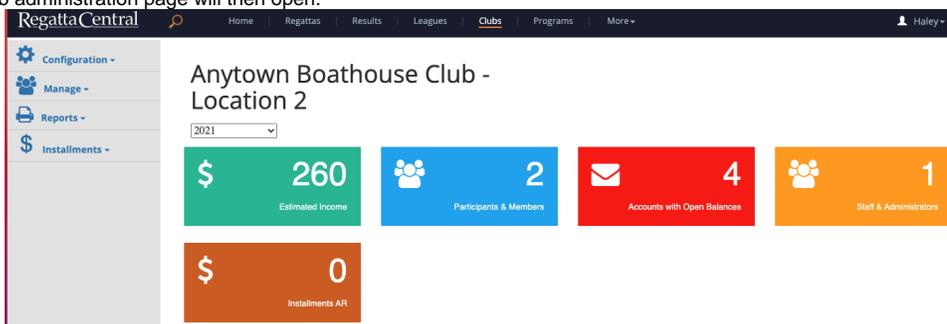
   a.

5. On the left hand side under reports click on 'Registrations by service'
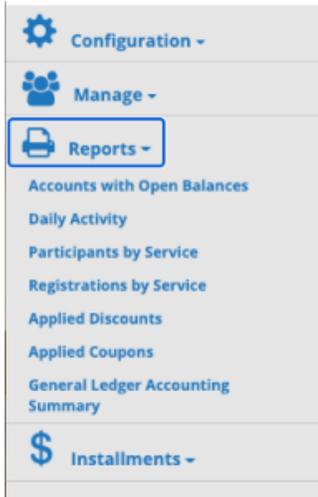
a.

1. Select the **Service Category** listed in the gray boxes

select 'Service Period'

Select 'Category'

	SKU	Title	Begins	Days/Times	Cost	Registrations	Est. Income
☑	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...

Generate Report ← Click here to 'Generate Report'. Once report generated, a new link will appear allowing you to email participants

a.

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

Can select Services from multiple 'Categories'

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

Check all Services you want included in the report

Options
☐ Include Custom Fields
☐ Include account holder's contact information more...

a. Generate Report ← Click here to 'Generate Report'. Once report generated, link will appear allowing you to email participants

3. Select the **Options** you wish to include in the report:
    a. **Custom fields:** Selecting this option will generate a column for each Item 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.
4. Click the '**Generate Report**' button
5. 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.
6. **Send Email-** You can send an email to all participants in the services selected by selecting the '**Send Email'** link
7. **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 was able to download the waiver	111-111-1111	

Select 'Edit' to complete 'Staff' fields and update athlete information

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

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Support

For assistance, please contact your RegattaCentral Account Manager. If you need help finding their information, please contact support@regattacentral.com with "Please forward to Account Manager" in subject line or call 614-360-2922.

Home