

# **CLUB AND STATE REPORTS**

You will find the 'Club Reports' tile located in the 'My Club' section of the left hand JustGo menu:



# Accessing standard JustGo and custom reports (for Clubs with Clubs+ Essential access):

- To access the reports select your category from the left-hand menu (1)
- The standard reports appear at the top of the list followed by any custom reports that Surfing Australia has created (2)
- Export your report and/or save to favourites by clicking on the (3)
- You can create new basic reports by selecting specific criteria (4) see next page with details on how to create your own reports

Dashboard & Reporting	SH	SA HQ	•
🗄 Dashboard 🛛 🚡 Reports			
Shortcuts	EK All V Q. Search	ා Refresh 🛛 🕅 New Rep	ort
Favourites Recent	E: Club Members With Active Memberships           This export displays all active memberships along with a summary of member details           @club Essential	Export CSV 🔹	0
Archive	Club Members With All Memberships		~
Category	(Stub Essential)	Export CSV +	$\lor$
Credential & Qualifications (2)			
Events (1)			
Finance (6)			
JustGo Documents (1)			
Members (7)	NOTE:		
Membership (2)	The 'Members' category refers to individual member profile informa	ation	
Orders (1)	(active members are whether they have an 'active' JustGo account, s	some	
Qualifications (1)	accounts can become inactive).		
		1	

## Most popular club reports:

- 'Membership' category > <u>Club Members with All Memberships</u>: Members who have a current or previous club membership
- 'Member' category > <u>Club Members</u> (use the Club Essential report): All users who have added your club to their profile
- 'Finance' category > <u>All Payment Details</u>: Use a date range to see all payments made to the club
- 'Qualifications' category > <u>Club/Surf Schools Members Accreditation Status</u>: Each members credentials status, this is a useful for Surf School Owners using JustGo for credentials



## Creating a new report:

• You can select up to 3 areas to pull your data from



- In the example below the report is taking data from the 'Members' area and the 'Membership and Affiliation' area so there will be 2 sections to select your data from in the left menu (1)
- Tick the data you want to select (2)
- Click 'Add' (3) and the select criteria will appear in the 'selected columns'

	← Create a Report				
	2 Export Columns				
	Available Columns			Selected Columns (0)	≞‡Sort
	Q Search				
1	斗 Members (53)	*			
	Profile				
	Member ID				
	User Name				
	First Name				
	Last Name				
	Full Name				
	Contact Number				
	Last Login Date				
		3	Add »		
	Date of Birth		« Remove		
	Birth Day				
	Birth Month				
	Birth Year				
	Age (j				
	Gender				
	Address Line 1				
	Address Line 2				
	Town				
	County/Region				
	Country				
	Postcode				
_	Momber Status		1		



- Click on the second section (if you are taking data from more than one section of a profile) (1)
- When you select the data then click 'Add' you will see the full list of data in the 'selected columns' area (2)
- Click 'Next' (3)

← Create a Report							
2 Export Columns				_			
wailable Columns		Selected Columns (8)	E18	iort			
Search		# Member ID (Profile)	10	2			
Members (48)		Einst Name (Brofile)					
Membership & Affiliation (19)	*	H Members	0	>			
User		Last Name (Profile)  Members	1	>			
		Hambers	0	, ,			
Member ID		Gender (Profile)					
Member Name 🕢		H Members	0	)			
Member Email Address		II Type (Members License) Membership & Affiliation	1	>			
Members License		II Start Day (Members License) Membership & Affiliation	1	<b>)</b>			
Ctart Month		End Day (Members License)	1	>			
Start Year	Add »	memoerang a Annadon					
End Month	« Remove			_			
End Year							
Membership Status							
Membership Name							
Start Date							
End Date							
Products							
Category							
Subscription							
Installment							

- You can add new criteria for the report based on specific conditions. In the example below the report will only show members aged between 16 and 21 years old (1)
- Click PREVIEW to review the report (note: you cannot export from here) (2)
- Click SAVE to save the report in your report list (3)

3 Criteria					
ADD the following	conditions that contacts match of	All			
Profile	✓ Age	✓ Between	✓ 16	21	20
					2



- The membership category which you select here will determine where your report is saved (1)
- Click publish and your report will appear in your club list for you to export (2)

	Save Report X	
	Name *	
	Test membership report age 16-21	
	Select Category *	
1	Membership 👻	
	Description	
	Test membership report age 16-21	
	Tag	
	Add the necessary tags to that report. + Add Tag	
	Save As Draft Publish	2

• You can manage your new report from your report list (1)

Dashboard & Reporting		TA Test Club Surfing Aus	•
Reports			
<ul> <li>Shortcuts</li> </ul>	EK All V Q. Search	😂 Refresh 🛛 🔒 New Repo	rt
Favourites	Club Members With Active Memberships     This asymptotic forebase all active memberships along with a summary of member datalle		~
Recent	Chib Essential	📾 Export 👻	$\lor$
Draft	P. Club Members With All Memberships		
Archive	All members in your club listing all past and present memberships (Club Essential	🖶 Export 🕞	$\heartsuit$
<ul> <li>Category</li> </ul>			
Clubs (5)	Fest Membership Report Age 16-21 Test membership report age 16-21	💽 View 👻	$\heartsuit$
Courses (1)		B Export	
Credential & Qualifications (2)		d Edit	
Events (1)		<ul> <li>Move to draft</li> <li>Archive</li> </ul>	
Finance (7)		11 Delete	
JustGo Documents (1)		1 Creativity Log	
Members (11)	_		
Membership (3)			
Orders (1)			
Qualifications (4)			
Teams (1)			

## Need further help?

Check out Surfing Australia's support portal for more support resources or to log a support request:

https://surfingaustralia.zendesk.com/hc/en-us