

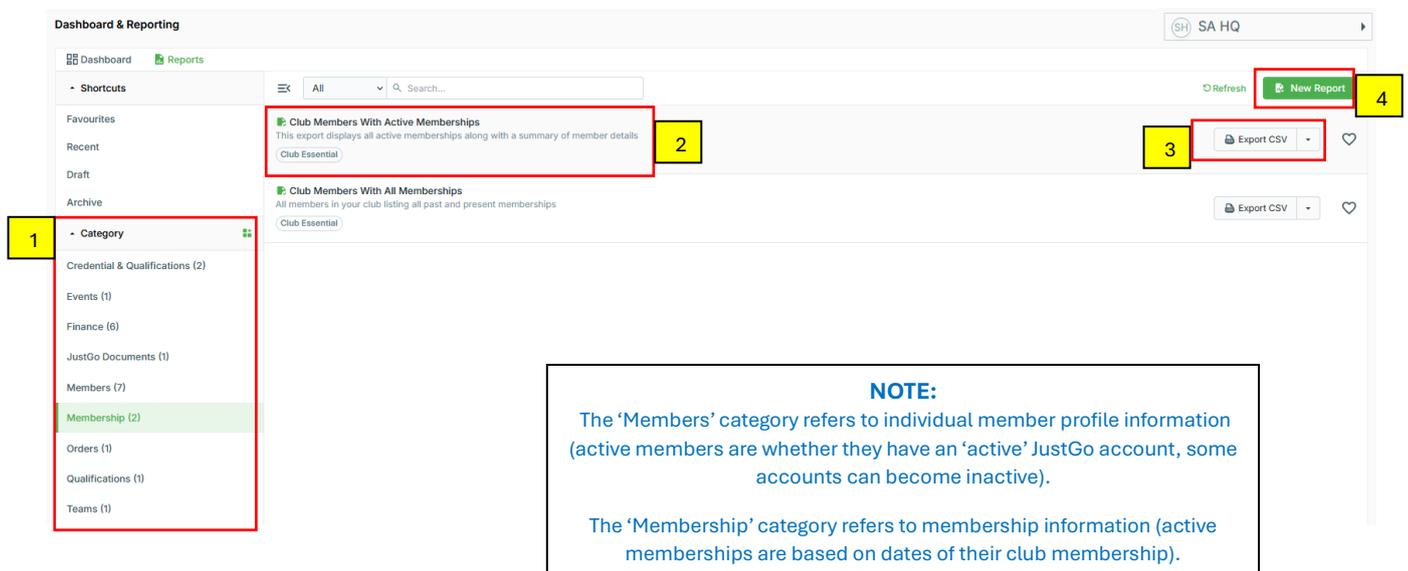
CLUB AND STATE REPORTS

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



NOTE:

The ‘Members’ category refers to individual member profile information (active members are whether they have an ‘active’ JustGo account, some accounts can become inactive).

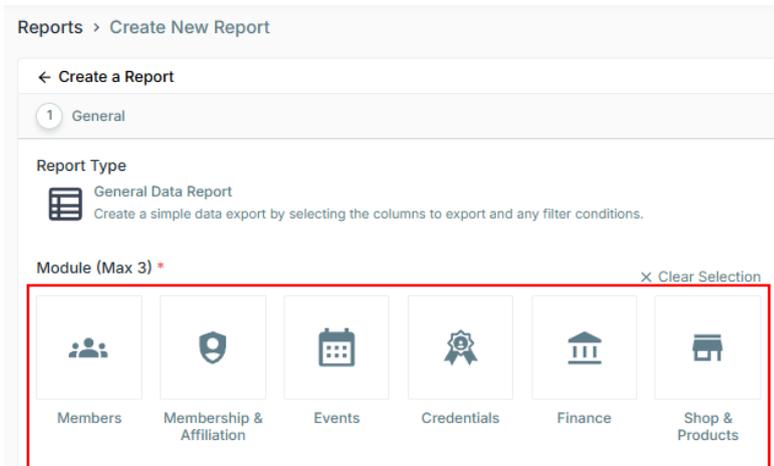
The ‘Membership’ category refers to membership information (active memberships are based on dates of their club membership).

Most popular club reports:

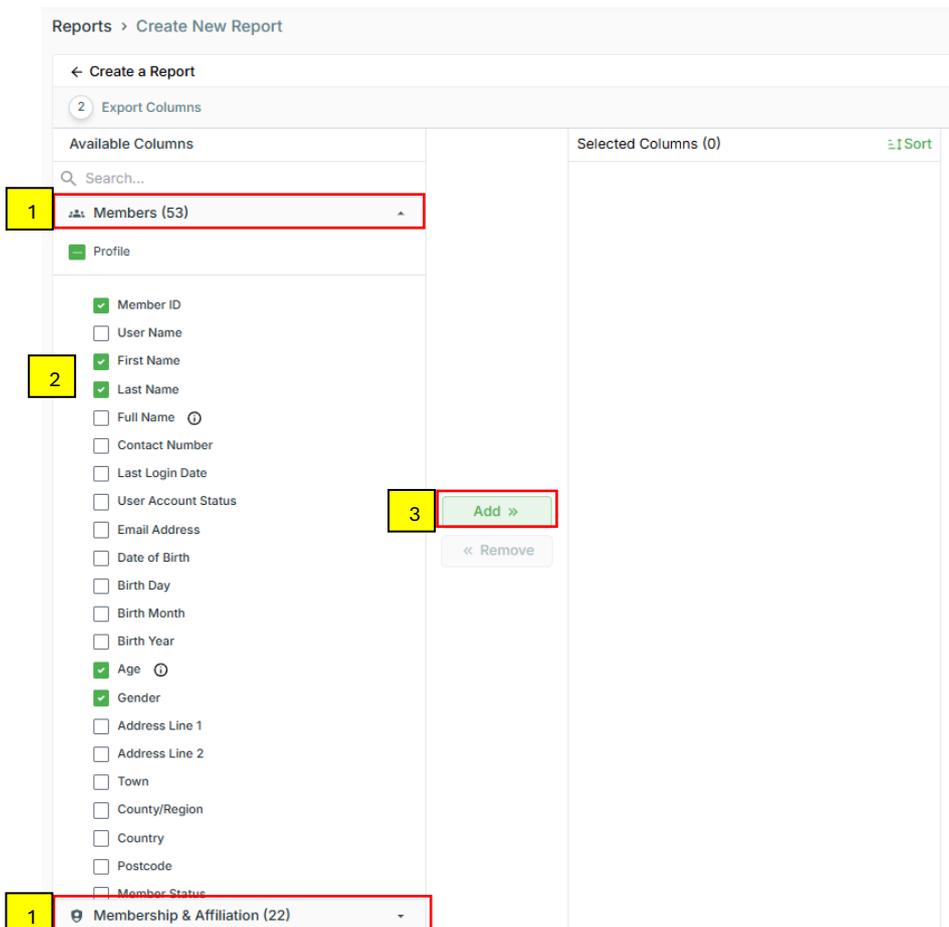
- ‘Membership’ category > Club Members with All Memberships:
Members who have a current or previous club membership
- ‘Member’ category > Club Members (use the Club Essential report):
All users who have added your club to their profile
- ‘Finance’ category > All Payment Details:
Use a date range to see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

Creating a new report:

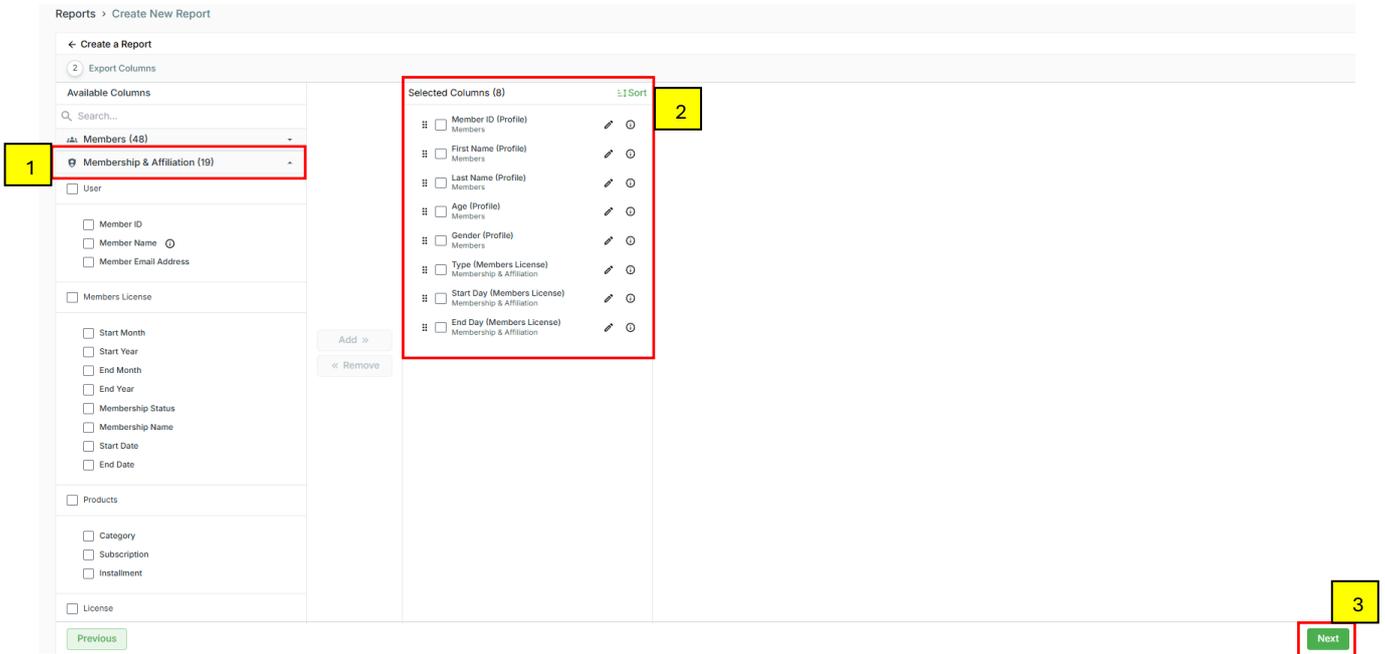
- You can select up to 3 areas to pull your data from



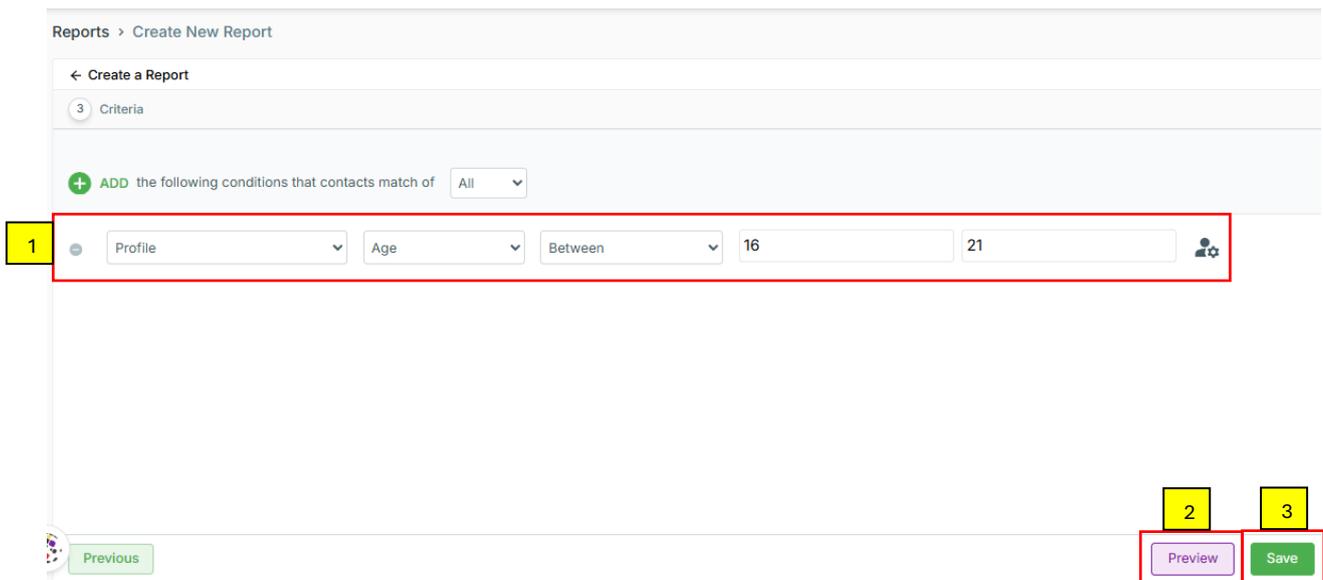
- In the example below the report is taking data from the 'Members' area and the 'Membership and Affiliation' area so there will be 2 sections to select your data from in the left menu (1)
- Tick the data you want to select (2)
- Click 'Add' (3) and the select criteria will appear in the 'selected columns'



- 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)



- 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)



- 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

Name *
Test membership report age 16-21

Select Category *
Membership

Description
Test membership report age 16-21

Tag
Add the necessary tags to that report.
+ Add Tag

Save As Draft Publish

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

Dashboard & Reporting

Reports

Shortcuts

Favourites

Recent

Draft

Archive

Category

Clubs (5)

Courses (1)

Credential & Qualifications (2)

Events (1)

Finance (7)

JustGo Documents (1)

Members (1)

Membership (3)

Orders (1)

Qualifications (4)

Teams (1)

Club Members With Active Memberships

Club Members With All Memberships

Test Membership Report Age 16-21

View

Export

Edit

Move to draft

Archive

Delete

Activity Log

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>