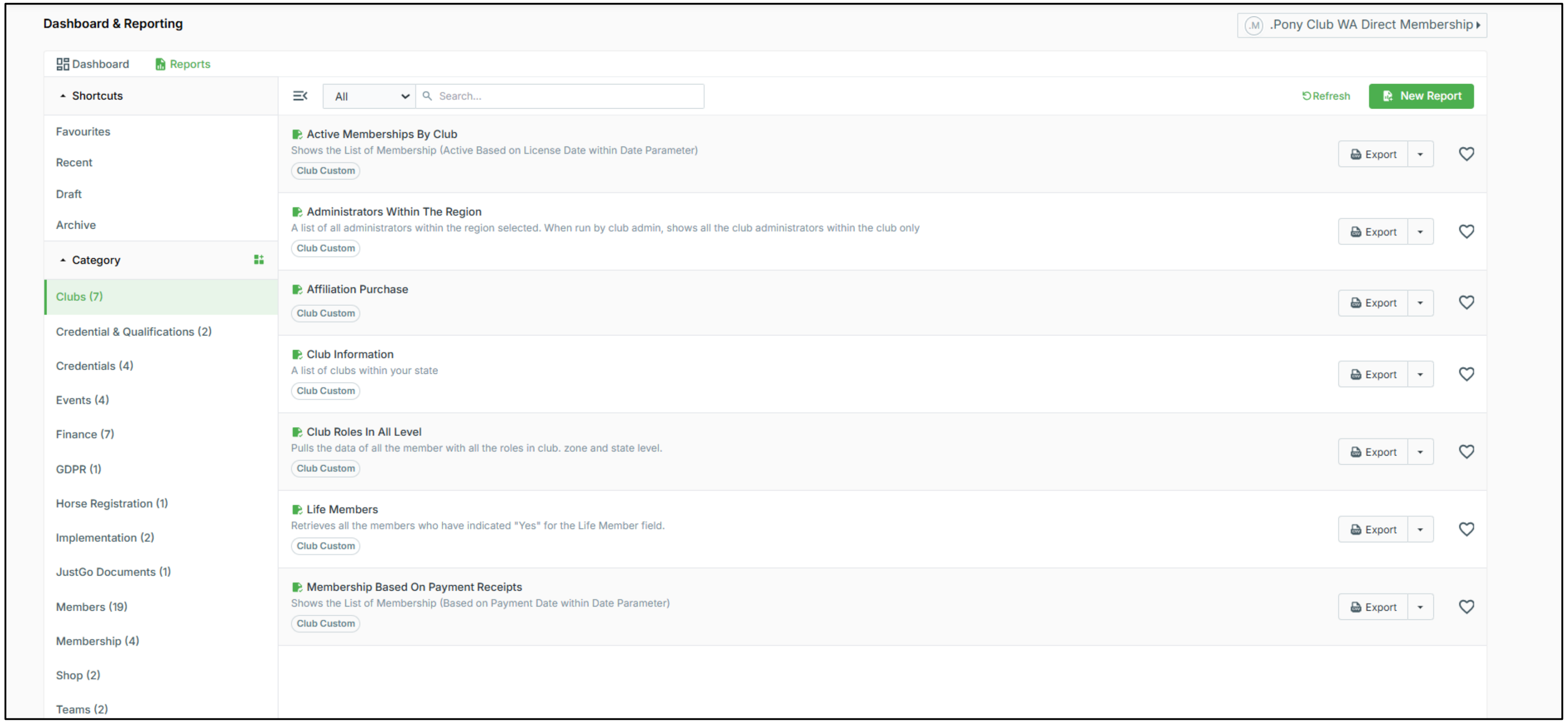
Upgraded Report Module

What is new about Report Module?

JustGo's report module has been updated as part of the new system updates.

The upgraded reporting module introduces an improved interface with on-the-go report creation capabilities.

This update is **available to all Pony Club® organisations.**

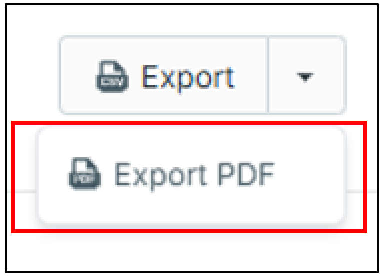


Upgraded Report Module

Reports can be extracted in two formats – **CSV and PDF**.

To extract reports in CSV format, click “**Export**”

To extract reports in PDF format, click on the dropdown and select “**Export PDF**”



New Reporting Interface

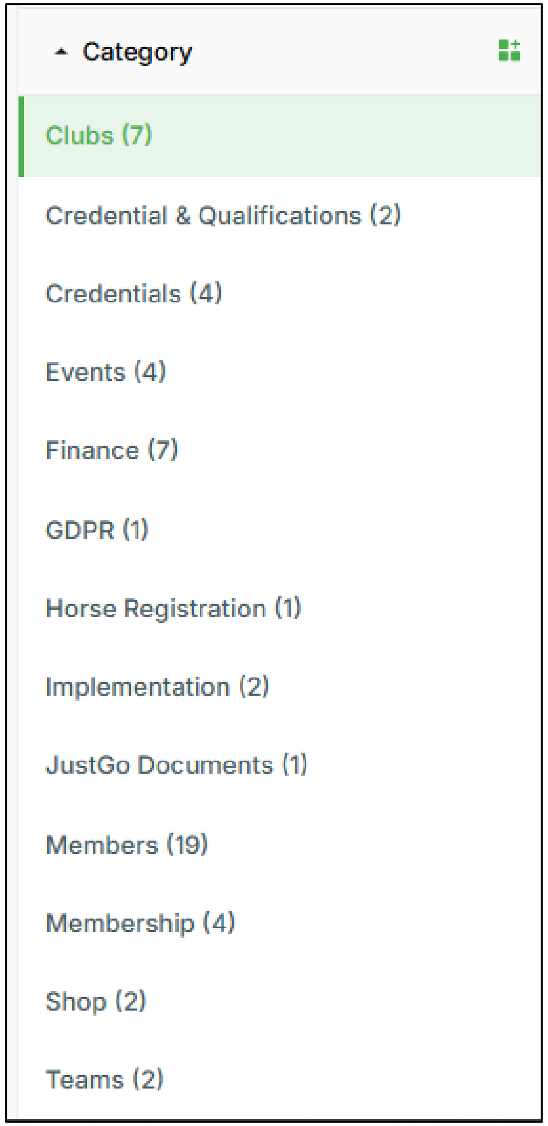
1. Consolidated list for Standard and Custom reports

In the previous module, reports were segregated as Standard Reports and Custom Reports for same report category.

For example, Standard Reports > Finance.
Custom Reports > Finance.

Standard and Custom reports are now combined into a single category.

For example, all Finance reports are grouped under one section.
Similarly, all Membership reports are grouped under the Membership category.



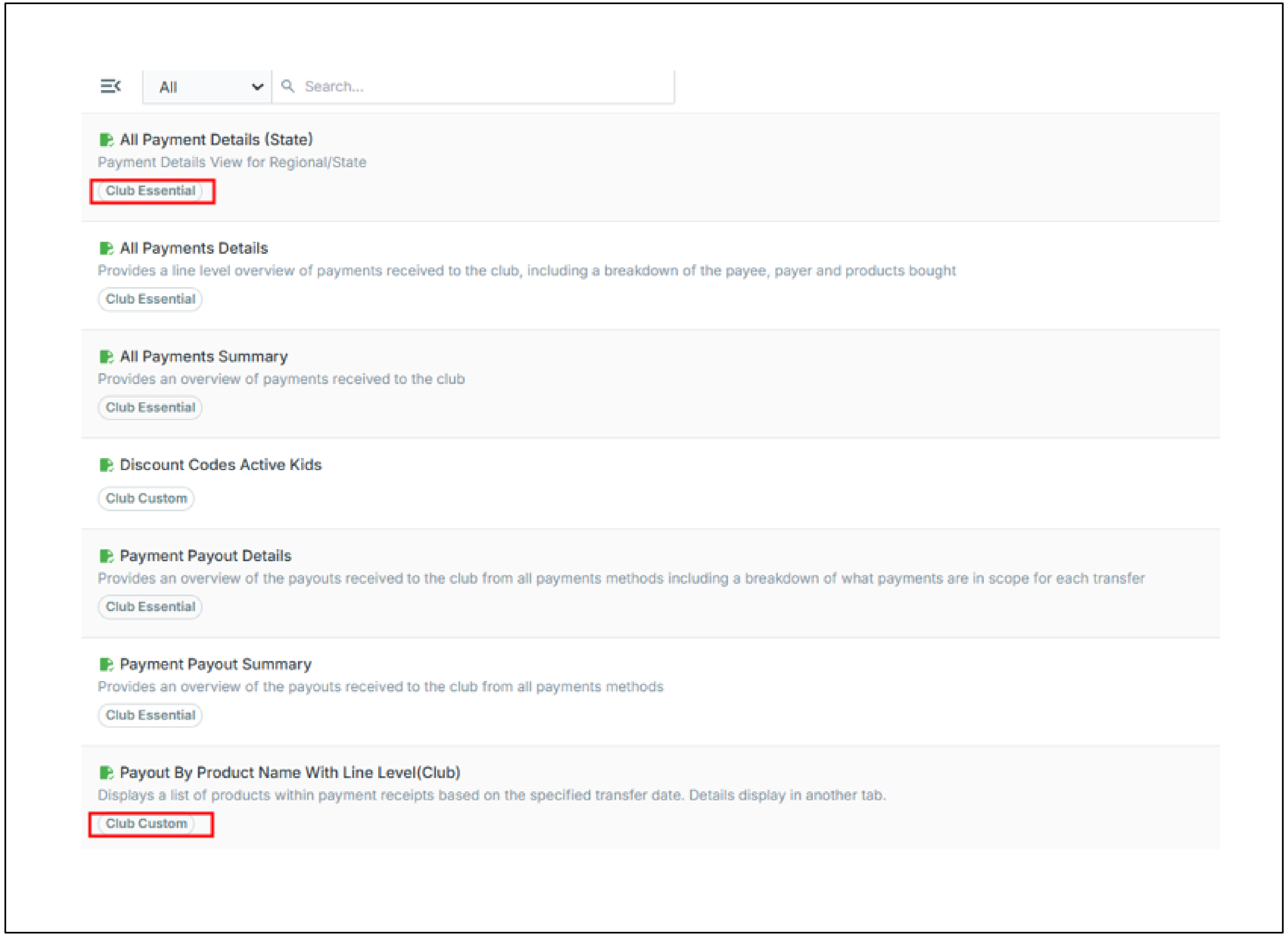
New Reporting Interface

1. Consolidated list for Standard and Custom reports

Standard and Custom reports are now labeled as 'Club Essential' and 'Club Custom' respectively.

Club Essential = Standard Report

Club Custom = Custom Report



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New Reporting Interface

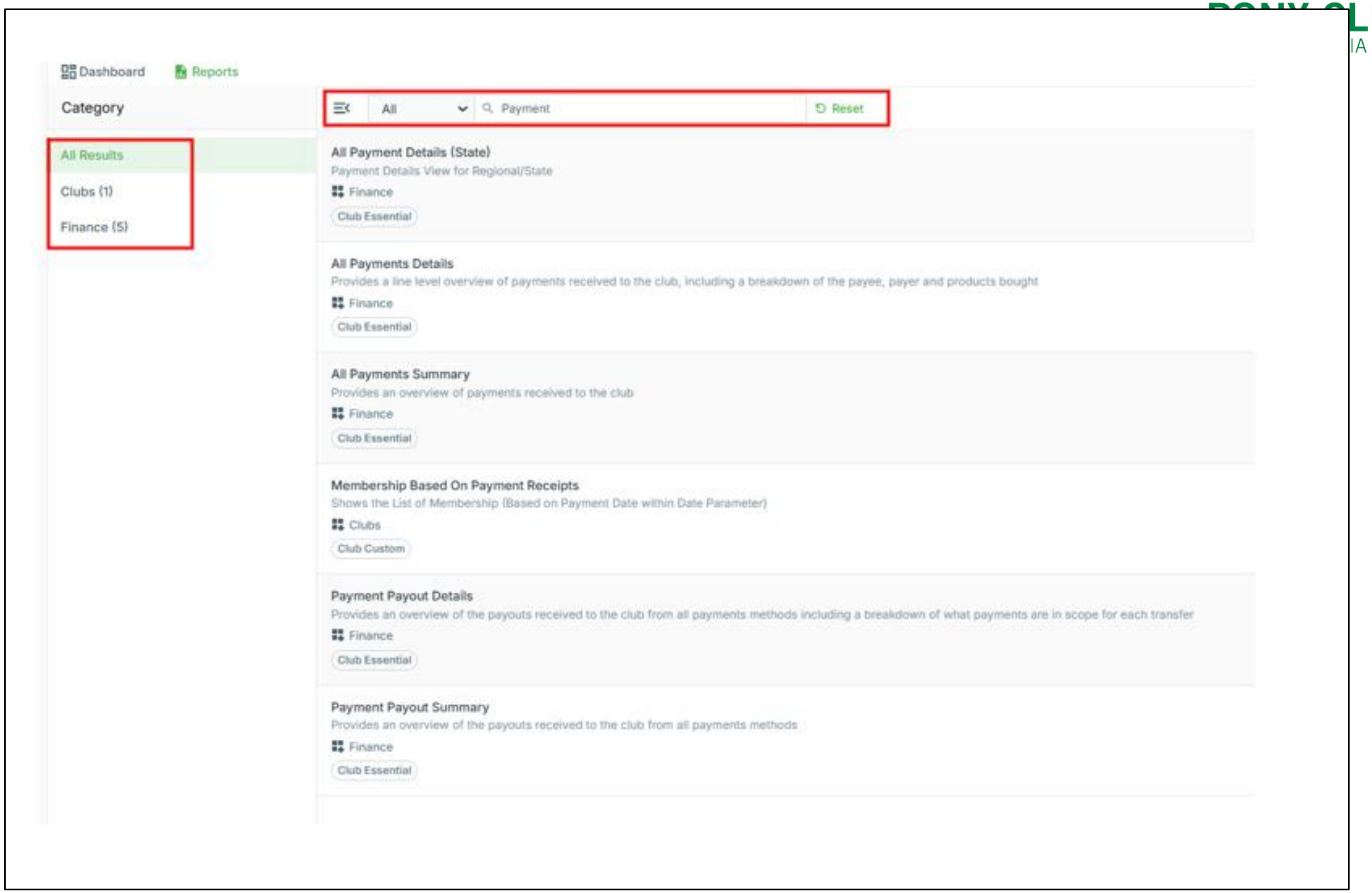
2. Search, Favourites and Recent Report

Navigate report categories quicker using search, favourites and recent reports

Search – Using the search bar, admins can search through all the reports.

The search bar now supports **dynamic search**, allowing partial keyword search.

Complete report name is not required to search through reports.



New Reporting Interface

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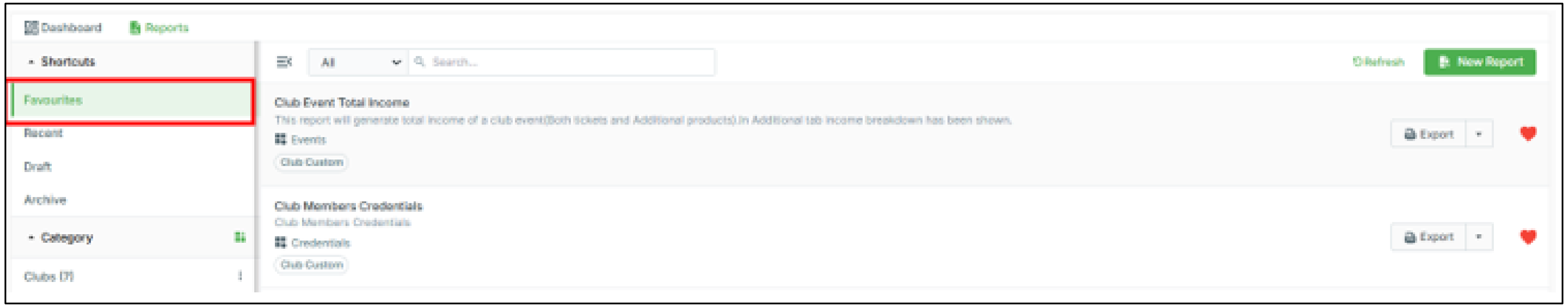
2. Search, Favourites and Recent Report

Favourites – Reports can now be marked as Favourites.

Clicking on "**Heart**" icon adds a report to favourites.



All the favourite reports can be accessed through the Favourites folder under Shortcut.

To **remove**, reports from the favourites category simply click on the red heart again.

New Reporting Interface

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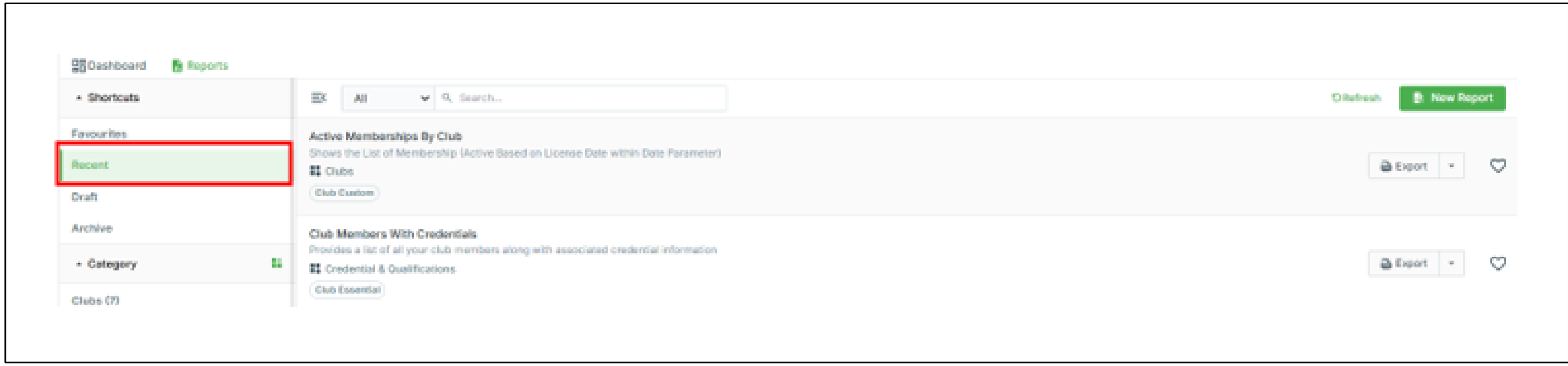
2. Search, Favourites and Recent Report

Recent Reports tracks previously accessed reports for easy retrieval.

It can be beneficial to track reports that are not part of the favourite list but were used recently.



New Reporting Interface

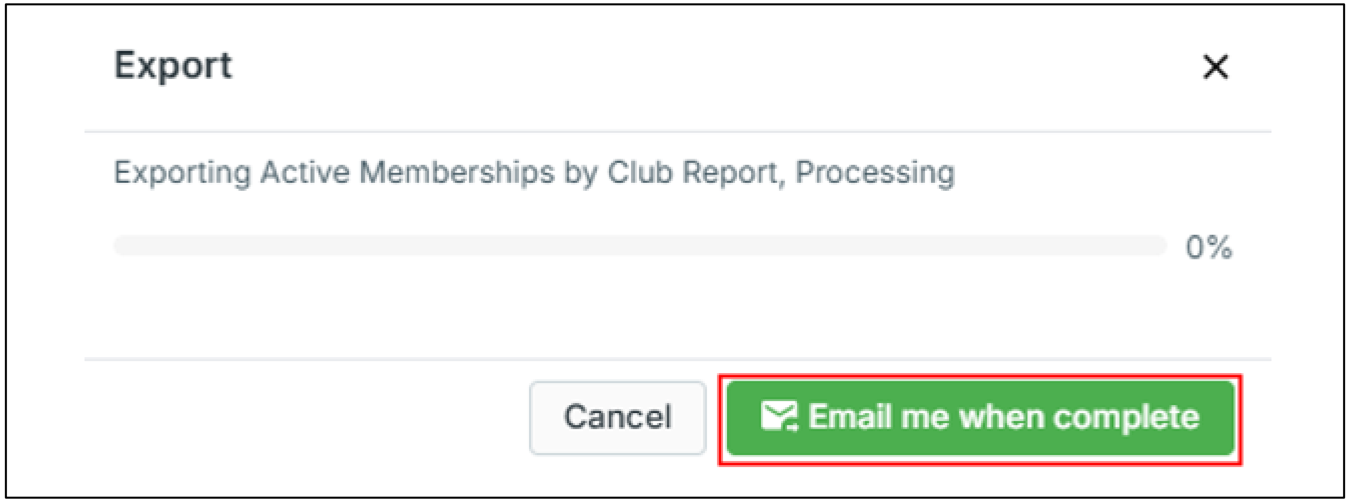
3. Email Me

Reports can now be emailed upon completion using **“Email Me When Complete”** button.

The report will be sent to the **email address associated with the user’s profile**.

If 'Email Me When Complete' is **not selected**, the report will download directly to your device.

Cancel button will cancel the extraction of the report.



New Reporting Interface

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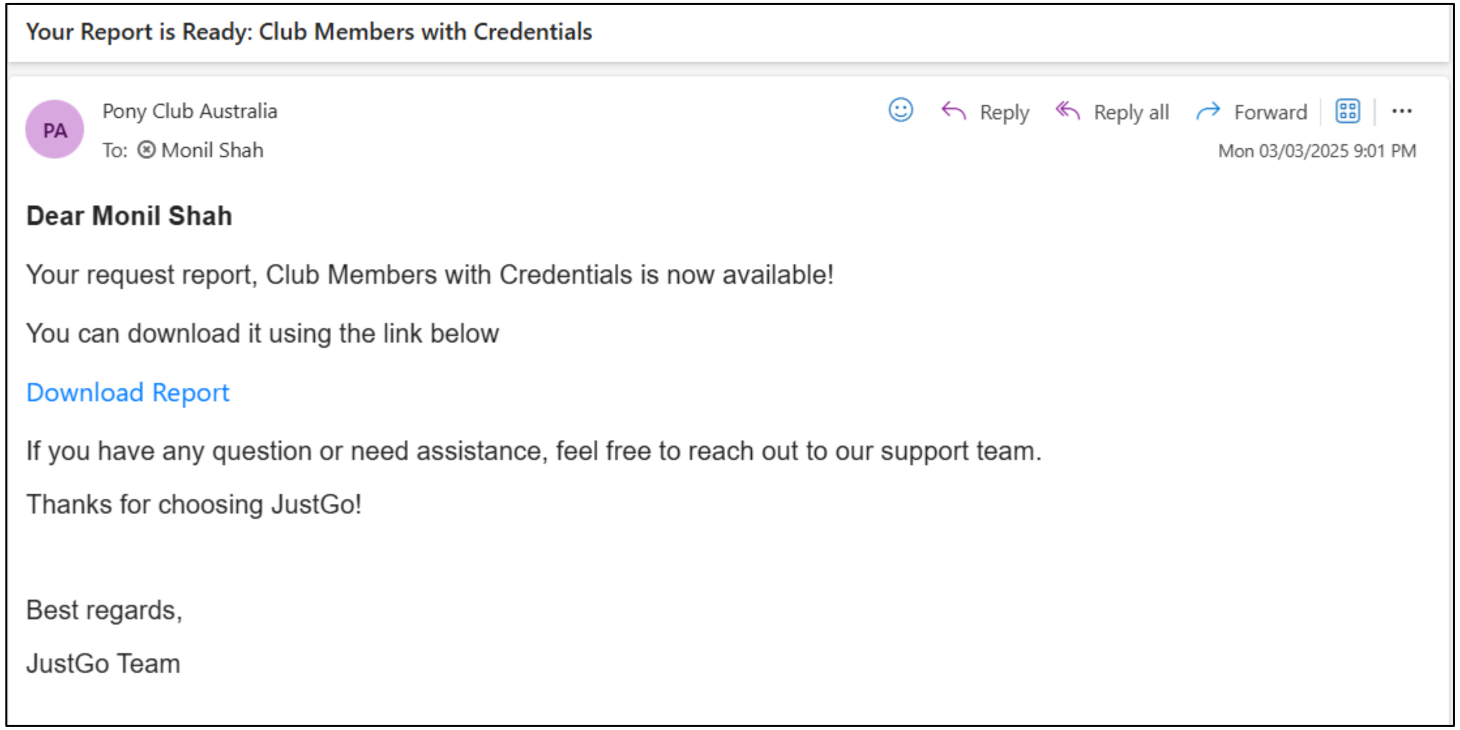
3. Email Me

Once the report is ready, an email will be sent with the **report name** and a **download link**.

"**Download Report**" button will download the report to your device.

We recommend not using mobile phones for this feature.

Do not reply to these emails. For any questions or concern about the report, contact Support@ponyclubaustralia.com.au


Your Report is Ready: Club Members with Credentials

PA Pony Club Australia
To: Monil Shah

Reply Reply all Forward

Mon 03/03/2025 9:01 PM

Dear Monil Shah

Your request report, Club Members with Credentials is now available!

You can download it using the link below

Download Report

If you have any question or need assistance, feel free to reach out to our support team.

Thanks for choosing JustGo!

Best regards,

JustGo Team

New Reporting Interface

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4. Pin

Report categories can now be '**pinned**' to appear at the top of the list for quick access.

To pin categories – hover on category name and click on the three dots.

New Report Creation Tool

The new Report Creation Tool enables admins to **create and publish reports** using selected data points.

The creation tool also offer **filtering and segmentation** functionalities.

Once published, the new reports will be saved under the desired report category.

Reports in progress can be saved as **drafts**.

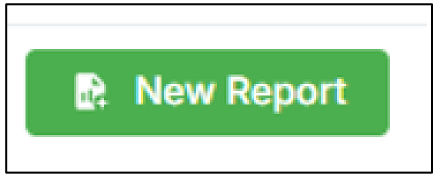
Reports can be **previewed** before publishing.

This feature is **available to all Pony Club® Organisations.**

New Report Creation Tool

Report Creation Process (Step-by-Step)

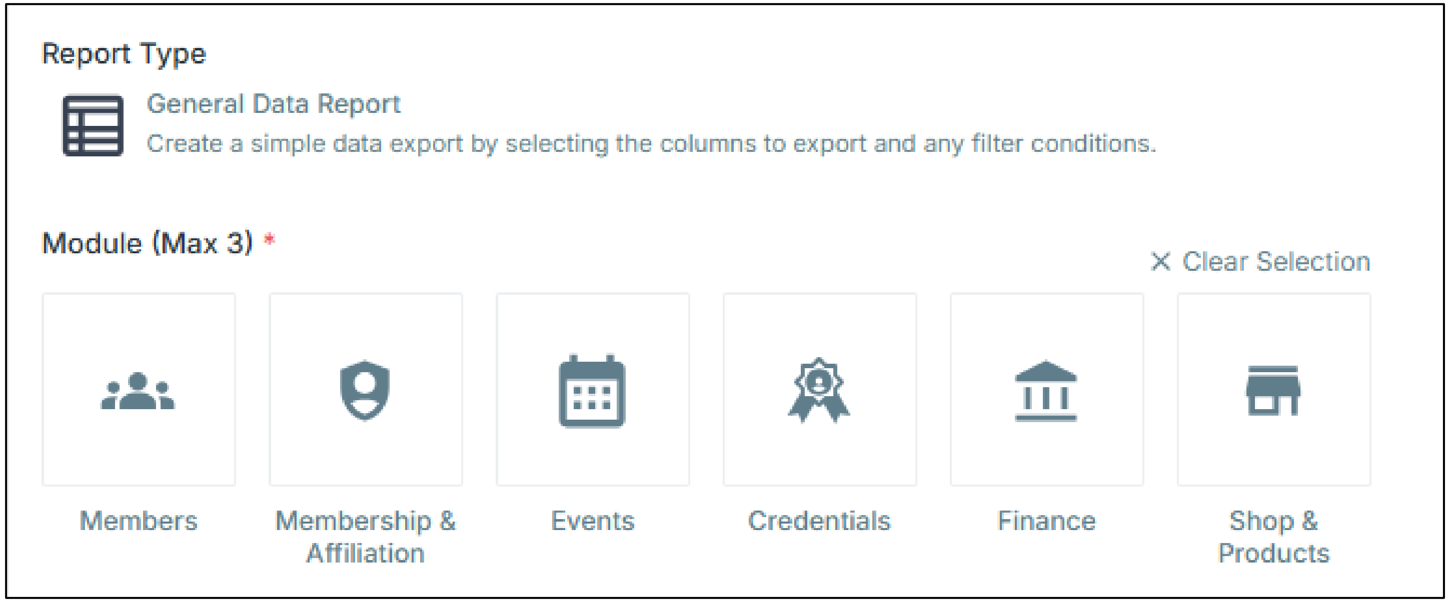
Report Creation Tool offers intuitive and easy way to create and publish reports.



Step 1 – Click on ‘New Report’

Step 2 – Select Modules.

Note – A maximum of three Modules can be selected.

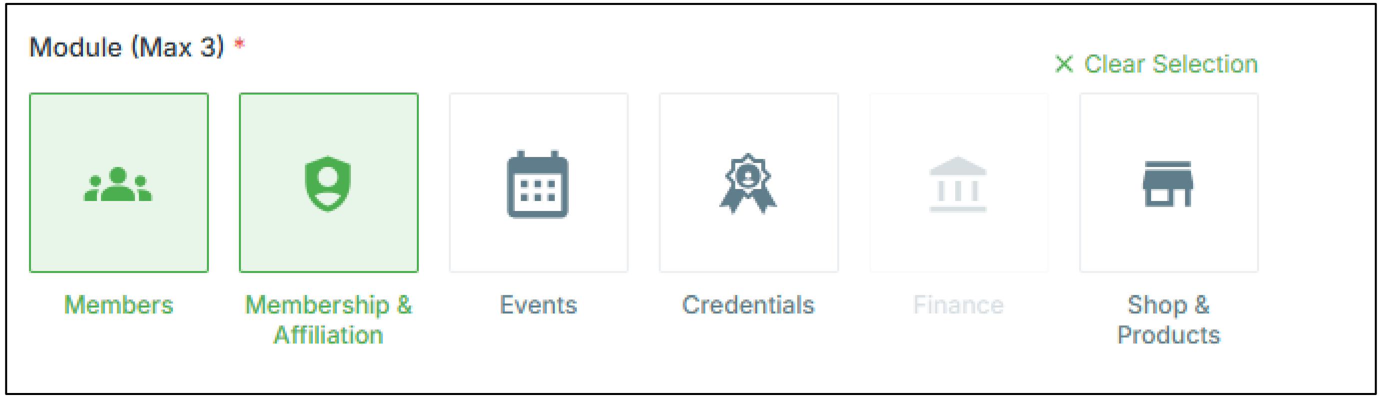


New Report Creation Tool

Step 2 – Select Modules (Data Points).

Based on selection, certain data points will be disabled.
For example, Membership and Finances cannot be selected together.

Once the modules have been selected, click **Next**



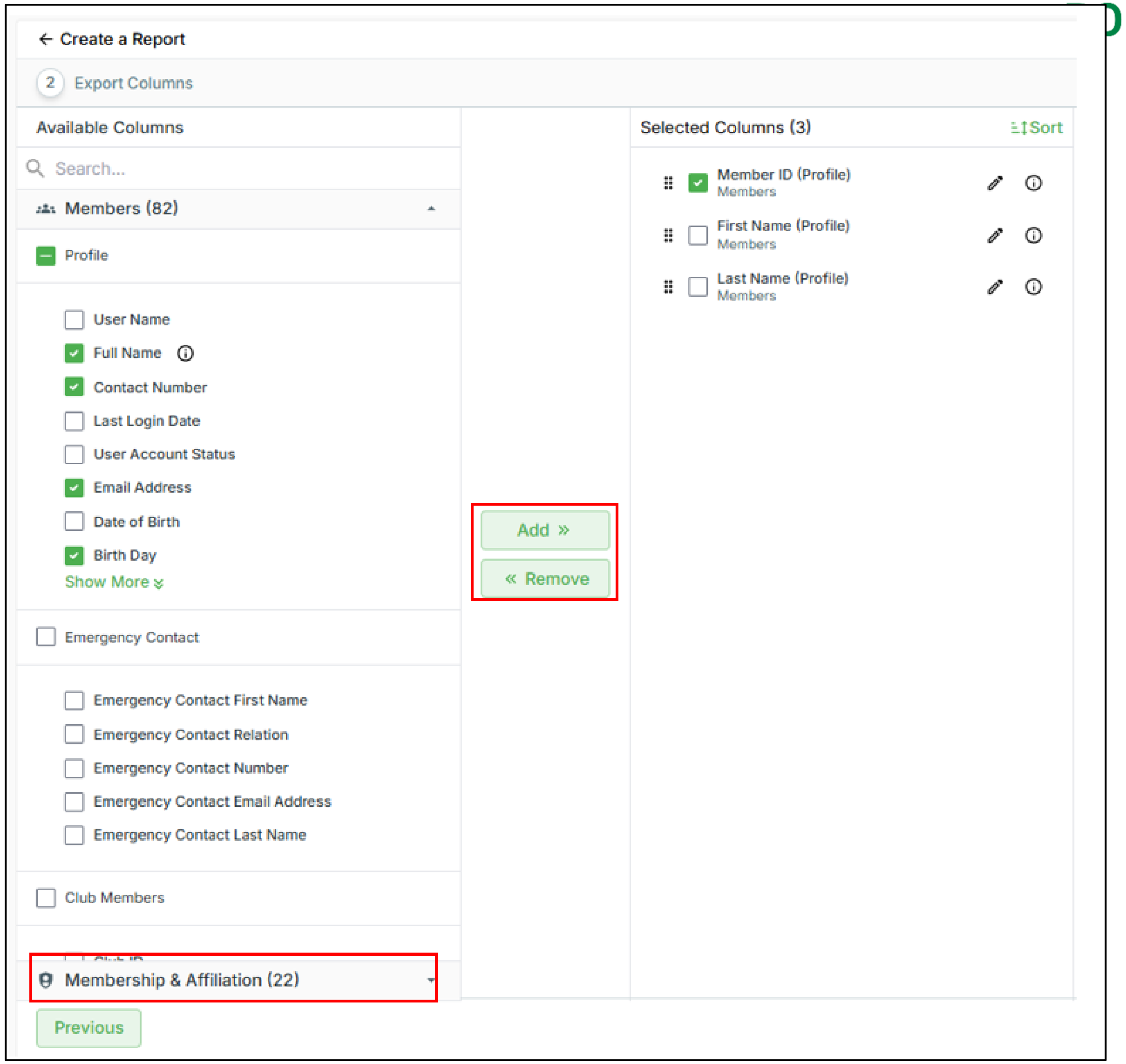
New Report Creation Tool

Step 3 – Select Columns (Data Points)

Select columns from each selected module.

Using the ‘**Add**’ option, selected columns will become part of the report.
To remove selected columns from the report, use ‘Remove’ option.

Note – Columns on left are the available columns from the database.
Columns on right are selected columns that will be part of the report.

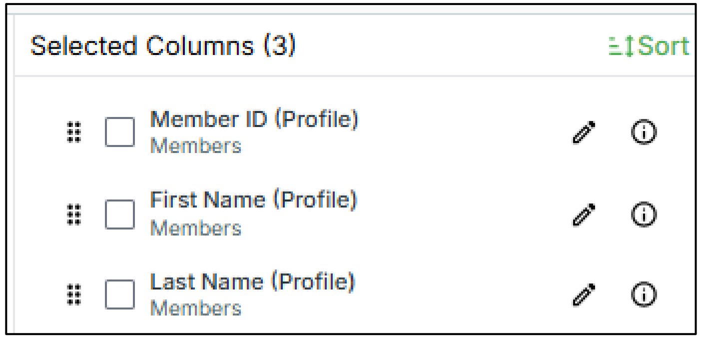


New Report Creation Tool

Step 3 – Select Columns (Data Points)

Selected columns can be renamed using the ‘Edit’ (pencil) option.

Click ‘Update’ to save the changes.

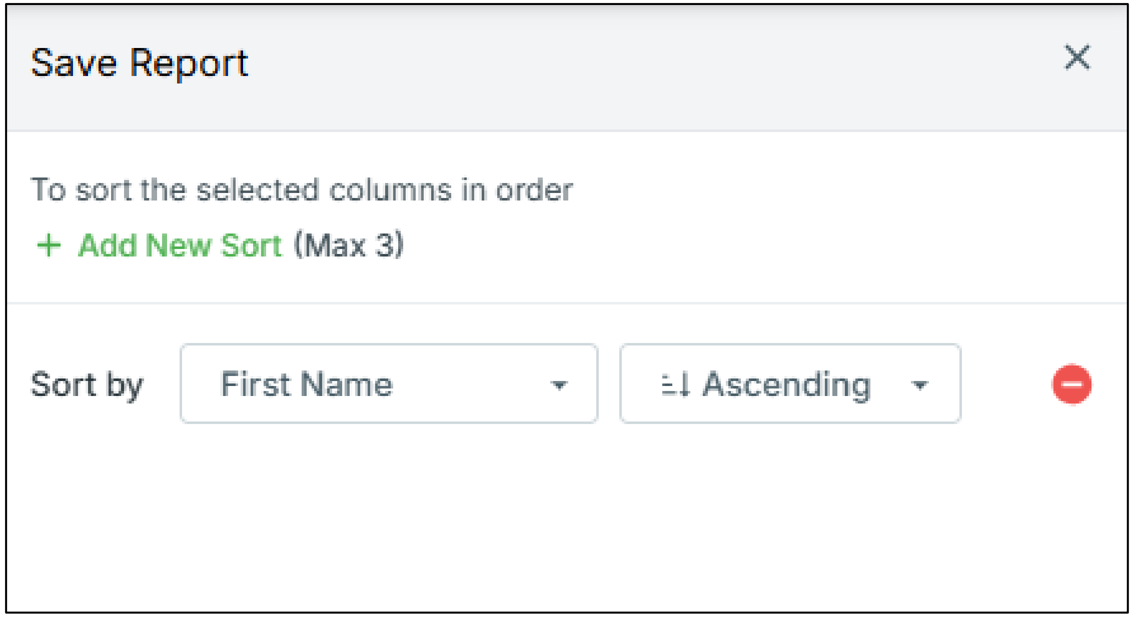


New Report Creation Tool

Step 3 – **Select Columns (Data Points)**

Selected Columns can also be **sorted**.

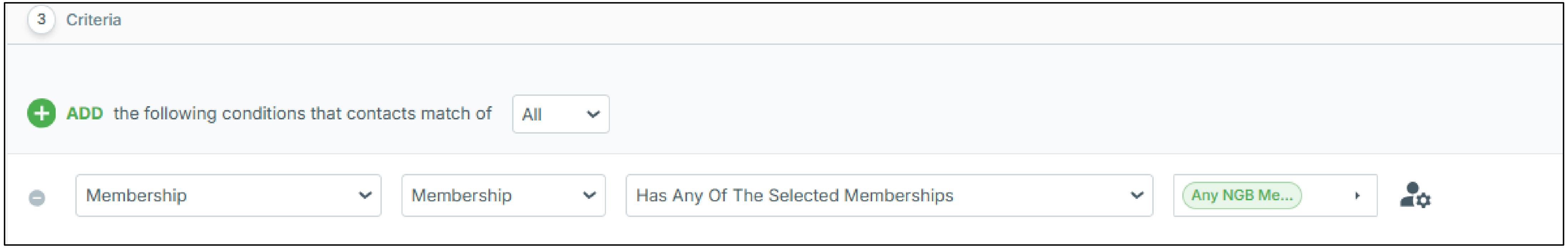
After sorting click **save.**



New Report Creation Tool

Step 4 – Filters

Filters can be applied on the selected columns.



New Report Creation Tool

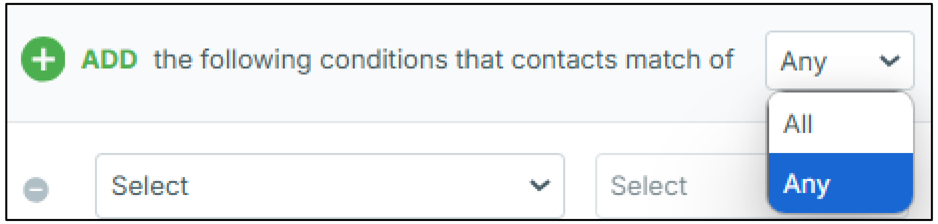
Step 4 – Filters

Two type of Add conditions are available with filters – **All and Any.**

All – **All the conditions (filters) must be matched**. If 2 conditions are applied, then both the conditions should be matched.

Any **– Any of the applied conditions must be matched.** If 2 conditions are applied, then any one condition should be matched.

You can **‘Preview’** the report to see the results of the applied filters.



New Report Creation Tool

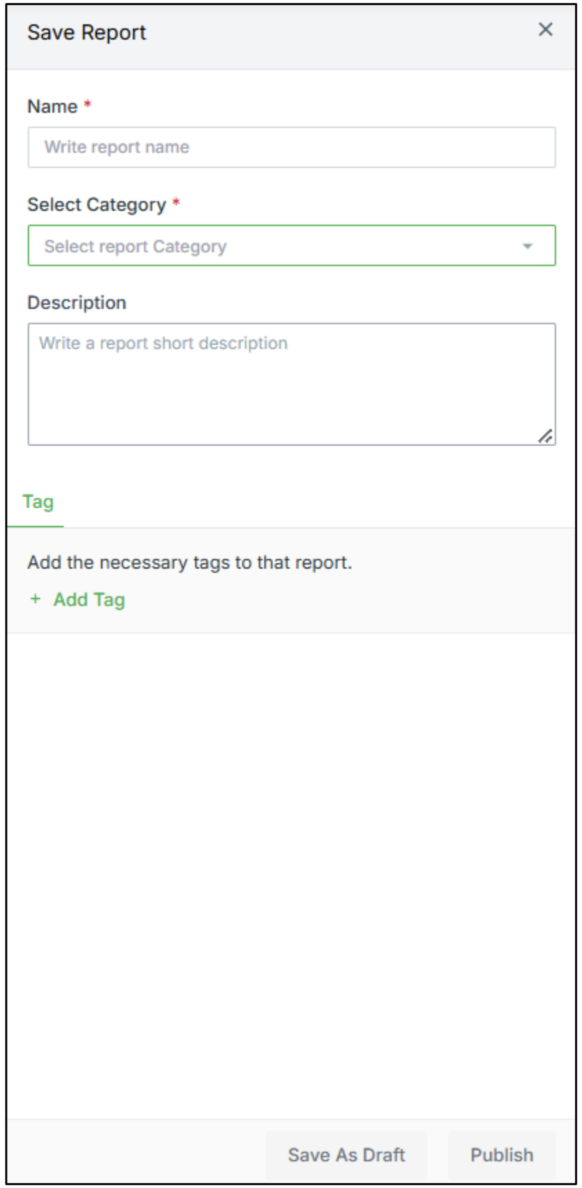
Step 5 – **Save**

Report Name and Report Category are **mandatory**.

Report Description and Report Tag are **optional**.

Reports can be either **Published or Save As Draft**.

Note – Report Creation Tool is to create basic and simple reports.
Complex and multi-layered required reports are already part of the reporting catalogue.



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