

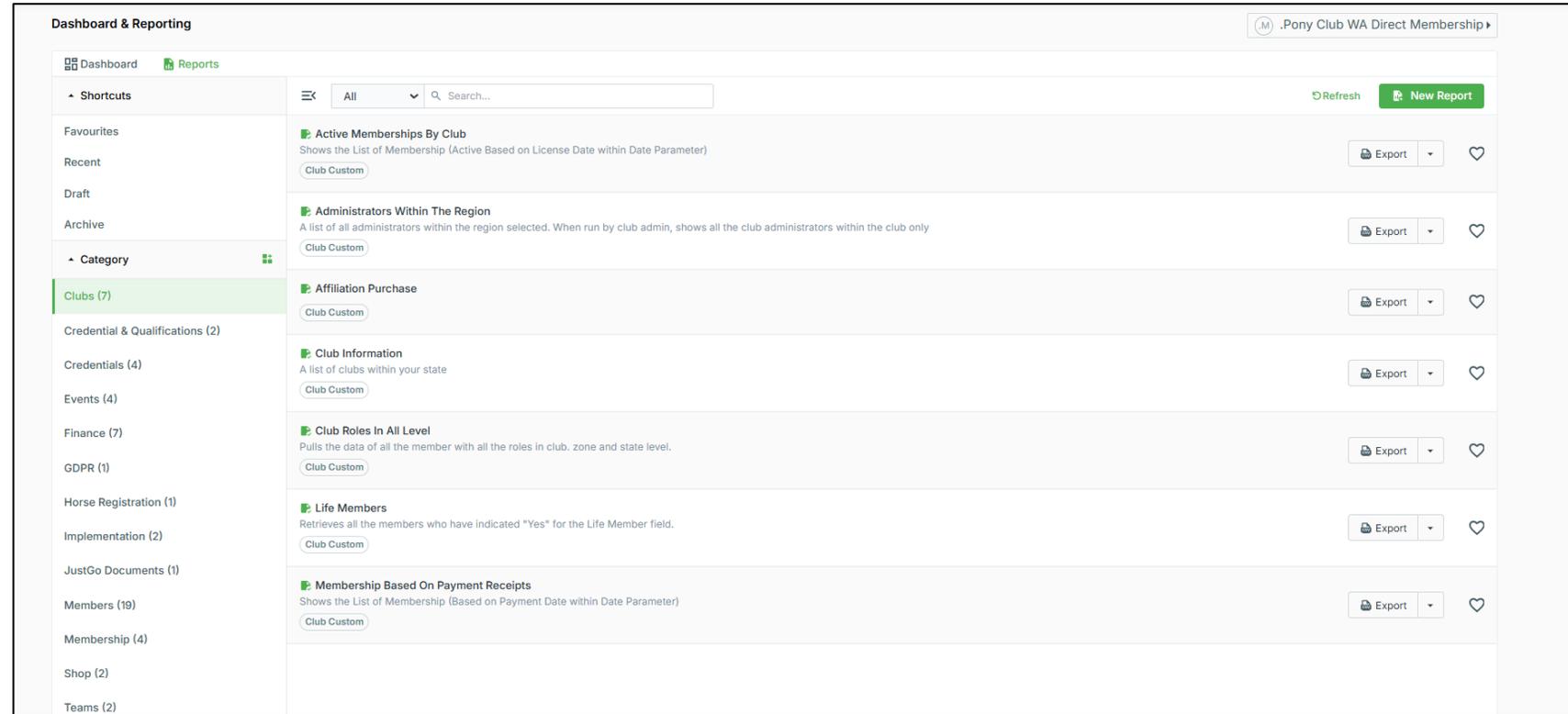
Upgraded Report Module

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.



The screenshot displays the 'Dashboard & Reporting' interface for Pony Club WA Direct Membership. The interface is divided into a left sidebar and a main content area. The sidebar contains a 'Shortcuts' section with 'Favourites', 'Recent', 'Draft', and 'Archive'. Below this is a 'Category' section with a grid icon, listing various report categories such as 'Clubs (7)', 'Credential & Qualifications (2)', 'Credentials (4)', 'Events (4)', 'Finance (7)', 'GDPR (1)', 'Horse Registration (1)', 'Implementation (2)', 'JustGo Documents (1)', 'Members (19)', 'Membership (4)', 'Shop (2)', and 'Teams (2)'. The main content area features a search bar, a 'Refresh' button, and a 'New Report' button. It lists several reports, each with a description, a 'Club Custom' button, and an 'Export' button with a dropdown arrow. The reports listed are: 'Active Memberships By Club' (Shows the List of Membership (Active Based on License Date within Date Parameter)), 'Administrators Within The Region' (A list of all administrators within the region selected. When run by club admin, shows all the club administrators within the club only), 'Affiliation Purchase', 'Club Information' (A list of clubs within your state), 'Club Roles In All Level' (Pulls the data of all the member with all the roles in club, zone and state level.), 'Life Members' (Retrieves all the members who have indicated "Yes" for the Life Member field.), and 'Membership Based On Payment Receipts' (Shows the List of Membership (Based on Payment Date within Date Parameter)).

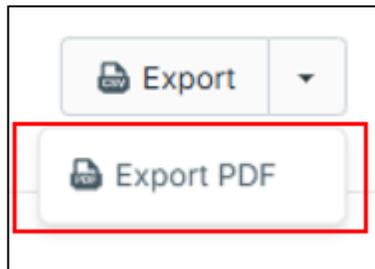
Upgraded Report Module

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

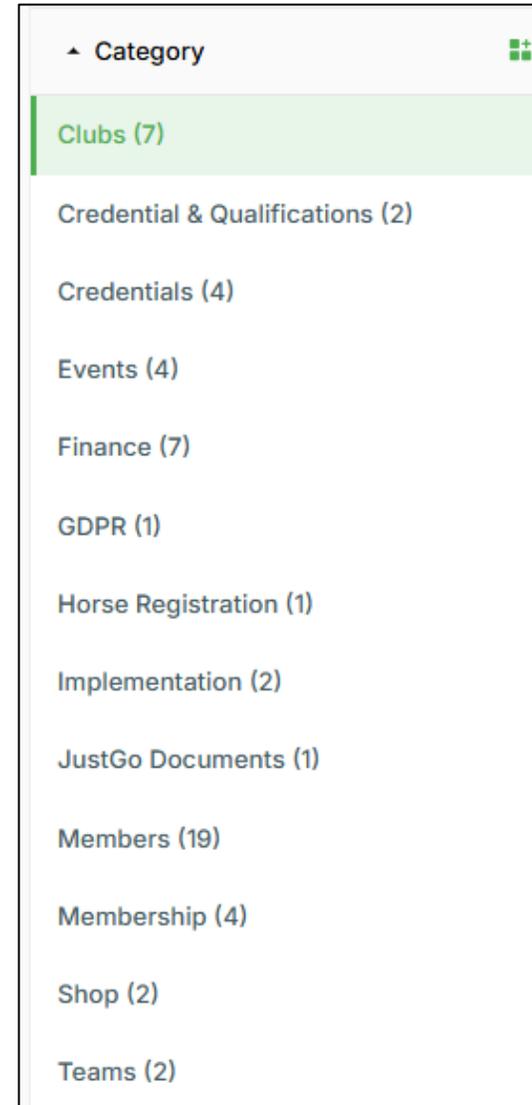
In the previous module, reports were segregated as Standard Reports and Custom Reports for same report category.

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.



Category
Clubs (7)
Credential & Qualifications (2)
Credentials (4)
Events (4)
Finance (7)
GDPR (1)
Horse Registration (1)
Implementation (2)
JustGo Documents (1)
Members (19)
Membership (4)
Shop (2)
Teams (2)

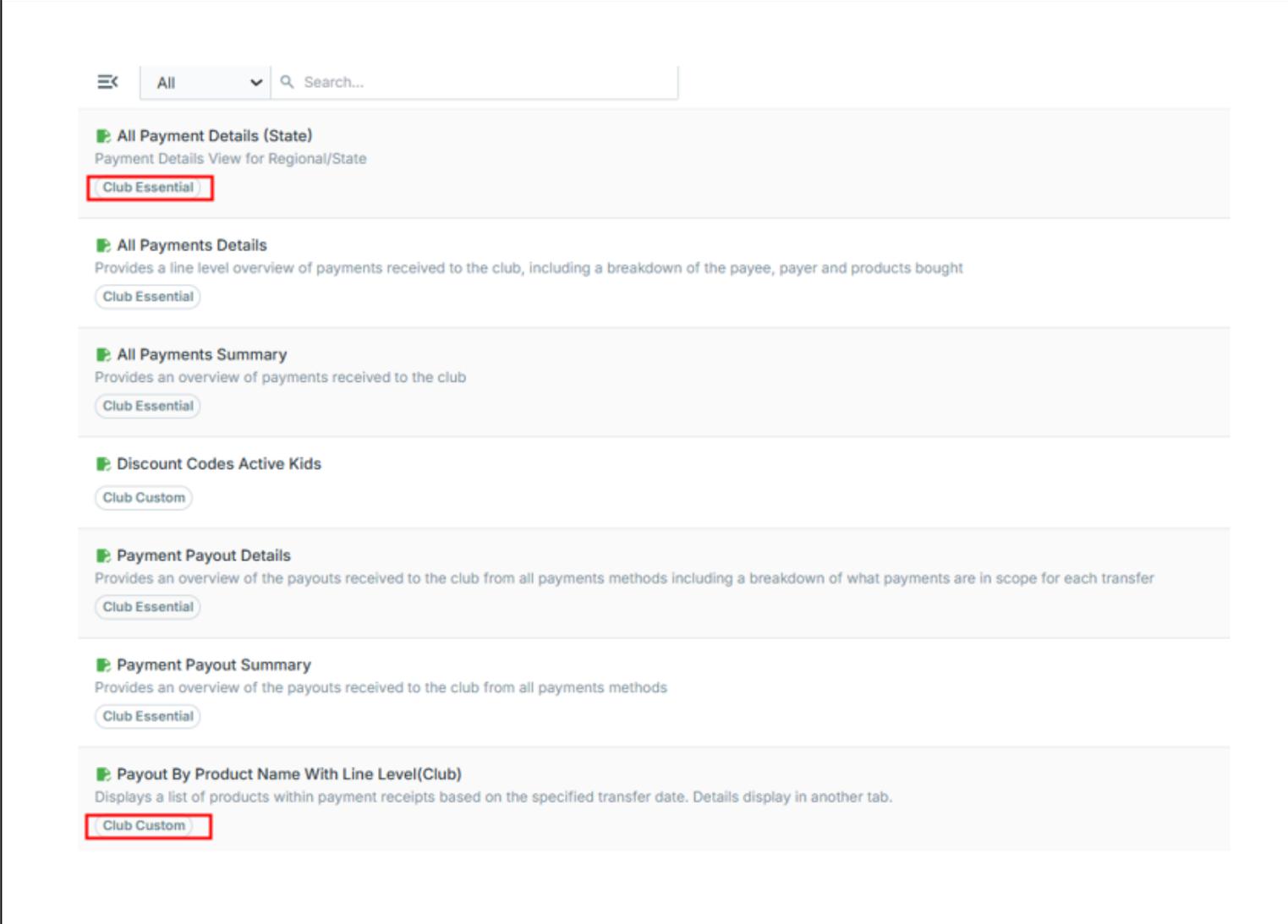
New Reporting Interface

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



The screenshot displays a reporting interface with a search bar at the top containing 'All' and a search icon. Below the search bar, a list of reports is shown, each with a description and a label indicating its category:

- All Payment Details (State)**: Payment Details View for Regional/State. Labeled **Club Essential**.
- All Payments Details**: Provides a line level overview of payments received to the club, including a breakdown of the payee, payer and products bought. Labeled **Club Essential**.
- All Payments Summary**: Provides an overview of payments received to the club. Labeled **Club Essential**.
- Discount Codes Active Kids**: Labeled **Club Custom**.
- Payment Payout Details**: Provides an overview of the payouts received to the club from all payments methods including a breakdown of what payments are in scope for each transfer. Labeled **Club Essential**.
- Payment Payout Summary**: Provides an overview of the payouts received to the club from all payments methods. Labeled **Club Essential**.
- Payout By Product Name With Line Level(Club)**: Displays a list of products within payment receipts based on the specified transfer date. Details display in another tab. Labeled **Club Custom**.



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.

The screenshot displays the 'Reports' section of the dashboard. At the top, there are navigation links for 'Dashboard' and 'Reports'. Below this is a 'Category' filter section with a search bar containing the text 'Payment' and a 'Reset' button. A dropdown menu is open, showing 'All Results' (highlighted in green), 'Clubs (1)', and 'Finance (5)'. The main content area lists several report categories, each with a description and a 'Club Essential' button:

- All Payment Details (State)**: Payment Details View for Regional/State. Finance. Club Essential.
- All Payments Details**: Provides a line level overview of payments received to the club, including a breakdown of the payee, payer and products bought. Finance. Club Essential.
- All Payments Summary**: Provides an overview of payments received to the club. Finance. Club Essential.
- Membership Based On Payment Receipts**: Shows the List of Membership (Based on Payment Date within Date Parameter). Clubs. Club Custom.
- Payment Payout Details**: Provides an overview of the payouts received to the club from all payments methods including a breakdown of what payments are in scope for each transfer. Finance. Club Essential.
- Payment Payout Summary**: Provides an overview of the payouts received to the club from all payments methods. Finance. Club Essential.

New Reporting Interface

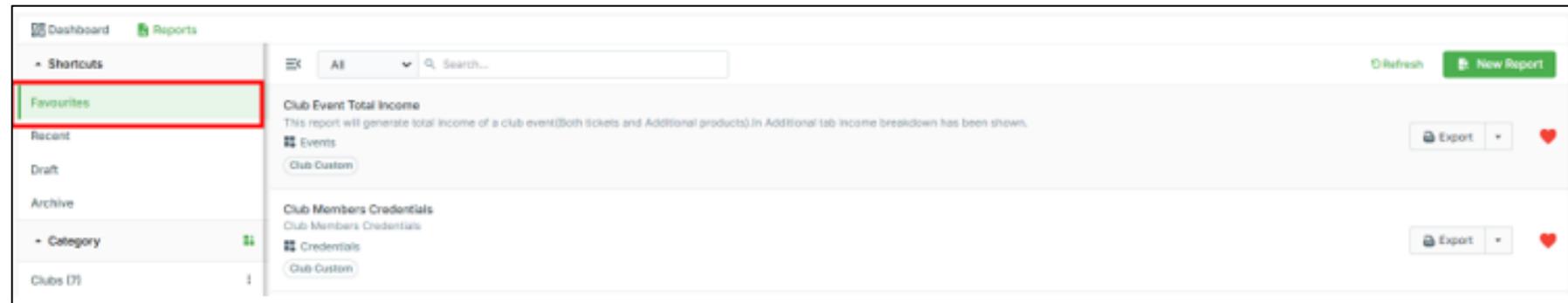
2. Search, Favourites and Recent Report

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.



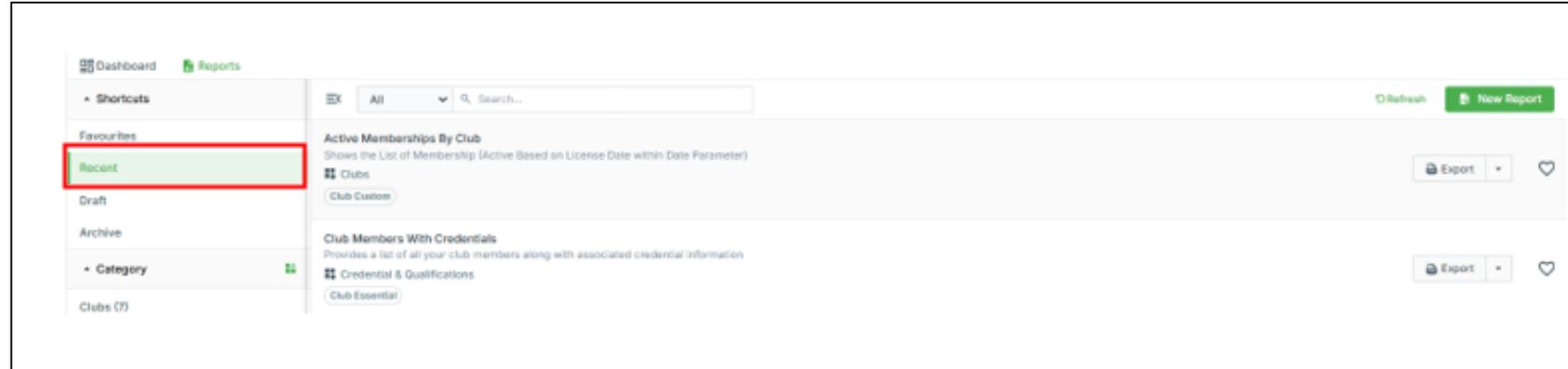
To **remove**, reports from the favourites category simply click on the red heart again.

New Reporting Interface

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

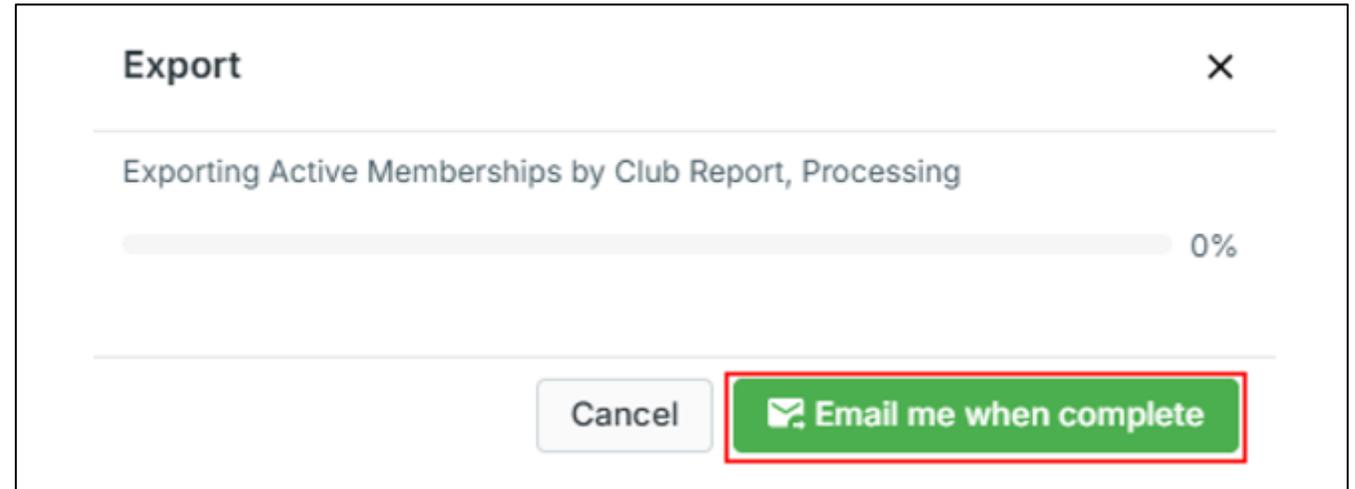
3. Email Me

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

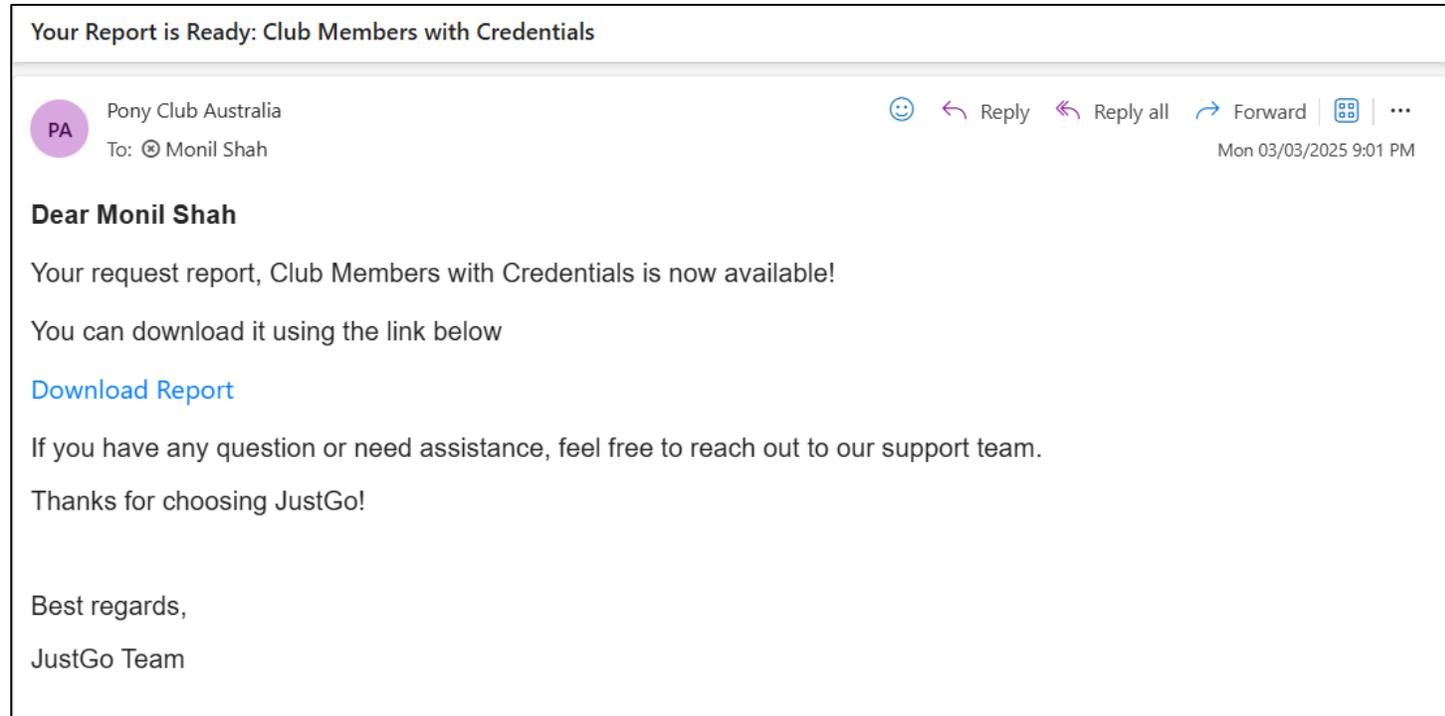
3. Email Me

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

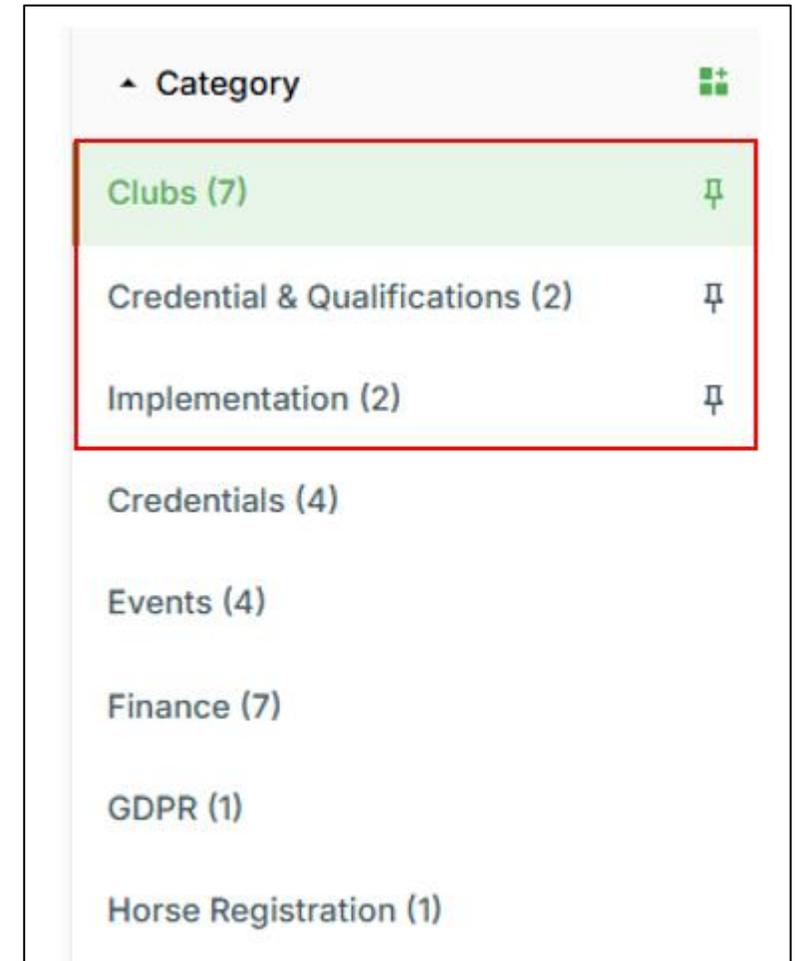
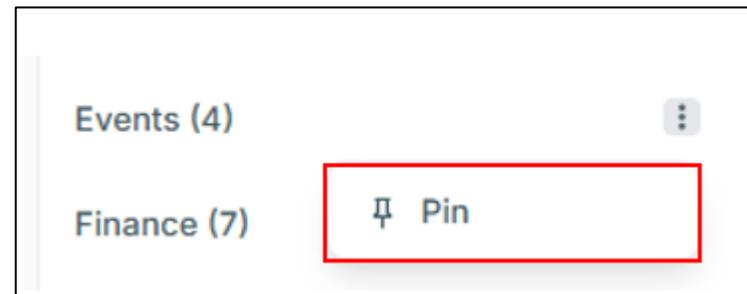


New Reporting Interface

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.

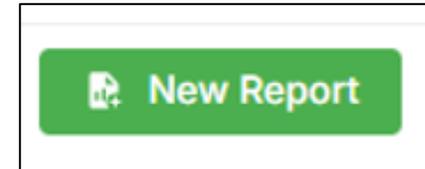
This feature is **available to all Pony Club® Organisations**.



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.

Report Type

 **General Data Report**
Create a simple data export by selecting the columns to export and any filter conditions.

Module (Max 3) *

X Clear Selection

					
Members	Membership & Affiliation	Events	Credentials	Finance	Shop & Products

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**

Module (Max 3) *

X Clear Selection

					
Members	Membership & Affiliation	Events	Credentials	Finance	Shop & Products



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.

The screenshot displays the 'Create a Report' interface, specifically the 'Export Columns' step. The interface is divided into two main sections: 'Available Columns' on the left and 'Selected Columns (3)' on the right. The 'Available Columns' section is organized into modules: 'Members (82)', 'Profile', 'Emergency Contact', and 'Club Members'. Under 'Members (82)', several columns are listed with checkboxes: 'User Name' (unchecked), 'Full Name' (checked), 'Contact Number' (checked), 'Last Login Date' (unchecked), 'User Account Status' (unchecked), 'Email Address' (checked), 'Date of Birth' (unchecked), and 'Birth Day' (checked). A 'Show More' link is visible below these options. Under 'Emergency Contact', there are five unchecked options: 'Emergency Contact First Name', 'Emergency Contact Relation', 'Emergency Contact Number', 'Emergency Contact Email Address', and 'Emergency Contact Last Name'. Under 'Club Members', there is one unchecked option: 'Membership & Affiliation (22)'. The 'Selected Columns (3)' section on the right shows three columns that have been added to the report: 'Member ID (Profile) Members' (checked), 'First Name (Profile) Members' (unchecked), and 'Last Name (Profile) Members' (unchecked). Each selected column has edit and delete icons. At the bottom of the 'Available Columns' section, there are two buttons: 'Add >>' and '<< Remove', both highlighted with a red box. At the bottom of the entire interface, there is a 'Previous' button.

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.

Selected Columns (3)		Sort	
<input type="checkbox"/>	Member ID (Profile) Members		
<input type="checkbox"/>	First Name (Profile) Members		
<input type="checkbox"/>	Last Name (Profile) Members		

Field Settings ×

Original Field Name

The Display Field Name

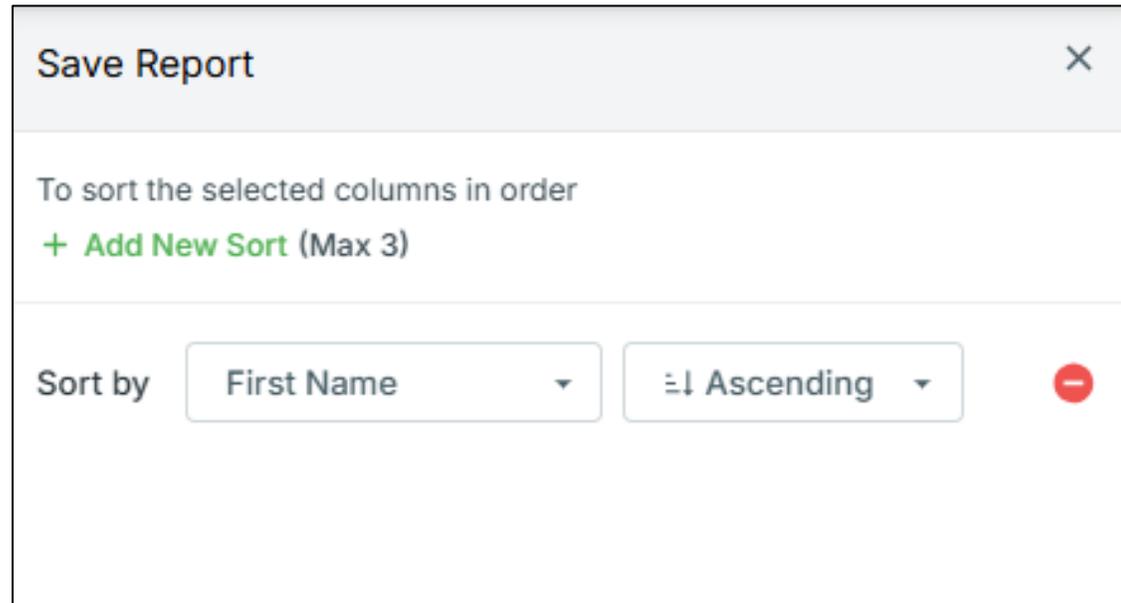


New Report Creation Tool

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.

3 Criteria

+ ADD the following conditions that contacts match of All

- Membership Membership Has Any Of The Selected Memberships Any NGB Me... 

New Report Creation Tool

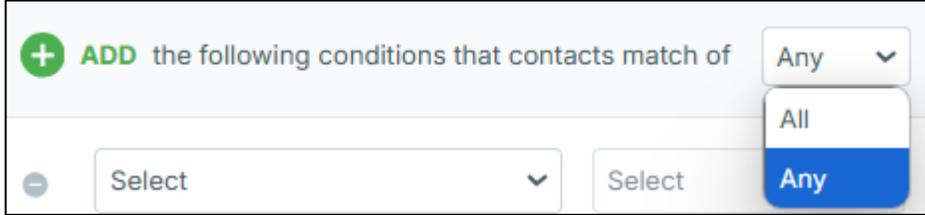
Step 4 – Filters

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.



A screenshot of a web interface for adding filter conditions. At the top, it says '+ ADD the following conditions that contacts match of' followed by a dropdown menu currently set to 'Any'. Below this, there are two 'Select' dropdown menus. The second dropdown menu is open, showing 'All' and 'Any' as options, with 'Any' selected and highlighted in blue.



Two buttons are shown side-by-side: a purple 'Preview' button and a green 'Save' button.

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.

Save Report ×

Name *

Select Category *

Select report Category ▾

Description

Tag

Add the necessary tags to that report.

+ Add Tag

Save As Draft Publish