Transaction Report

25/03/2025 1:13 pm AEDT

Overview

The Transaction Report will allow you to report on anything related to the transactions that have been processed in your database or through your Registration Forms, including which products members have purchased, whether or not members are paid or unpaid, which payment method the member used, and more.

Step-by-Step



Step 2: Open the Finance folder

Select the FINANCE tab to open a folder of finance-related reports

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Silverwood Sports Association Association		Reports @	
💮 Dashboard		Dashboard	Reports are grouped into different areas depending on the data they report on. Choose the type of report you would like to use from the buttons on the left.
Finances	*	Admin Reports	There are two types of reports present in the system. Quick Reports - Indicated by the 'Run' button, they are predefined and allow you a quick look at your data.
88 Members	*	Clearances	Advanced Reports - Indicated by the 'Configure' button, they allow you to define which fields you want to display and add custom filters to your report. Ouick Reports
Competitions	*	Clubs	
💭 Clubs	*	Competition	Quick Report: Funds Received From Braintree A quick report to identify Funds Received based on Date Funds Sent or Distribution ID. When running the report the user can choose Run
🗭 Teams	*	Contacts	A quick report to deminy runds received usage on back runds sent of bischoutorns, when unning the report the user can choose to use one or both input options to generate the report
		Courtside	
Registrations	*	Finance	Quick Report: Transactions Run
Courses	•	Members	
P Reports		Team App	Quick Report: Members in current Season Run
Marketplace		Teams	Popular Reports
		Tribunal	
		Venue	Transactions Set your own parameters etc for reporting on Transactions Configure
요음 12 🚊 Members Teams Clubs	Comps		Funds Received Set law are proportions of for reporting on Transporting from which you have constant funds Configure

Step 3: Open the Transaction Report builder

Find the Transaction Report and click CONFIGURE

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Silverwood Sports			Finance				
Association Association	<		Members		Quick Report: Funds Received From Braintree		
Dashboard			Team App		A quick report to identify Funds Received based on Date Funds Sent or Distribution ID. When running the report the user can choose to use one or both input options to generate the report	Run	
(\$) Finances	×		Teams				
828 Members	•		Tribunal		Quick Report: Transactions	Run	
♀ Competitions	Ŧ		Venue				
<u>呉</u> Clubs					Transactions	Configure	1
🗭 Teams	•				Set your own parameters etc for reporting on Transactions		J
€ Communications					Funds Received	_	
Registrations	*				Set your own parameters etc for reporting on Transactions from which you have received funds	Configure	
Courses	*						
C Reports					Transactions Sold Set your own parameters etc for reporting on Transactions that you have sold	Configure	
🕅 Marketplace							
					Funds Received within Structure (Same Bank Account) - Braintree Set your own parameters etc for reporting on Transactions from which levels below you have received funds into the Same Bank Account as yours	Configure	?
eedback Memt [™] Feedback	Comps				GD Invoices Report to balance the GameDay monthly Payments Invoice	Configure	

Step 4: Add any relevant fields to the report

Use the + button to add any fields onto the report from the left-hand field list into the central **Selected Fields** panel. The expansive list of fields available as part of the Transaction Report include transaction details, refund details, member details, custom field responses, contact details, parent/guardian details and more

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Silverwood Sports Association Association		Report Manager igure Report: Transactions					
Dashboard S Finances APA Members	0	Choose a field from the left column and drag It int Different types of fields are available from differe Click the Run Report button to execute the repor	nt field group				
Competitions •		ind A Field	~	Selected Fields			
Clubs •	Tr	ransaction	^	Transaction ID	Filter :		Remove 😑
€ Communications	G	Item Cost		Product	Filter :		Remove
Registrations •	G	Quantity		Floquet	Filter :		Remove 🚽
Courses •	C	Promo Code		Payment For	Filter :		Remove 😑
P Reports	G	Line Item Discount					
\land Marketplace	G	Manual Receipt Reference		Line Item Total	Filter :		Remove 🖨
	G	Payment Type		Run Report			
	G	Payment Method		Options			(?)
<u>28; 97 ñ</u> Ç	C	Payment Gateway Reference		Show	Unique Records Only	O Summary Data	
Memt E Feedback Comps				Sort by	National Number	Ascending	¥

Step 5: Run the report

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verwood Sports sociation sociation	Find A Field	Selected Fields		
🖹 Dashboard	Transaction	✓ Transaction ID	Filter :	Remove 😑
) Finances •	Refunds	Y Product	Filter :	Remove 🖨
Competitions •	Personal Details	• • • • • • • • • • • • • • • • • • •		
L Clubs •	Contact Details	Payment For	Filter :	Remove 🖨
Teams •	Parent/Guardian	✓ Vine Item Total	Filter :	Remove 🖨
Registrations •	Other Fields	✓ Payment Log ID	Filter :	Remove 😑
Courses *	Unlimited CFs	~		
 Reports Marketplace 		✓ Transaction Date	Filter :	Remove 😑
		Payment Date	Filter :	Remove 🖨
		Transaction Status	Filter :	Remove
e 🖓 🚊 😡		Run Report		Q

Watch

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