

Reports

Payment Gateway Report

To access reporting on money to be deposited into your bank account for reconciliation.

1. Go to Reports/Payment Gateway Report.
2. Under payment gateway select the payment gateway.
3. Deselect Include transactions for affiliated orgs.
4. Click on **Generate Report**

Payment Gateway Report

The screenshot shows a web form for generating a Payment Gateway Report. It includes the following fields and options:

- Payment Gateway:** A dropdown menu currently set to "All Gateways".
- Transaction Status:** Radio buttons for "Successful" (checked) and "Failed".
- Date Range:** Two date input fields labeled "From" and "To", each with a calendar icon.
- Internal or External reference:** A text input field.
- Affiliates:** A checked checkbox for "Include transactions for affiliated orgs".
- Transaction Type:** Radio buttons for "Payment" (checked), "Refund" (checked), and "Disbursements".
- Generate Report:** A blue button at the bottom right.

5. Once data is displayed scroll to bottom of screen and click on download data.

 [Download Report](#)

6. Select download type excel click ok.

The screenshot shows a "Download Report" dialog box with the following options:

- Choose download format:**
 - Microsoft Excel 2007
 - Microsoft Excel 2003
 - Tab separated values (TSV)
 - Comma separated values (CSV)
- Buttons:** "Cancel" and "Ok".

Use this excel spreadsheet to reconcile transactions against the Payment Settlement report provided by finance and the bank account statement.

The MPS Disbursement Report will display all transaction taken through the gateway. The individual transaction will need to be reconciled to the Settlement Report which will list the payments disbursed to the bank as a transaction group which will add up to the amount deposited in the bank account for each payment release.

To access a report on all the registration data collected on participants.

1. Go to Reports/Registration/Transaction Report
2. Select Form **do not use All Forms**
3. Click **Go**

Registration Transaction Report

Registration Form From To

Adelaide Thunderbirds School Holiday Clinics

4. Once data is displayed scroll to bottom of screen and click on download data.

 [Download Report](#)

5. Select download type excel click ok.

Download Report

Choose download format:

Microsoft Excel 2007

Microsoft Excel 2003

Tab separated values (TSV)

Comma separated values (CSV)

This report can then be filtered in Excel to display information which can be utilised for trialling purposes.



Custom Lists

Create a custom person filter

Custom reports are designed to enable the user to extract data from MyNetball as required. A custom filter is used to segment the data for the custom report.

To create a custom filter complete the following steps;-

1. Go to People/Custom Person List/Custom Filter Management

Person Filter Management ?

[+ Add New Filter](#)

2. Click on **Add New Filter**

Person Filter Maintenance ?

[← Back to Person Filter Management](#)

Name:

Description:

Filter Type: Static Dynamic

Role:

Sub Role: Any Sub Role Select Sub Roles...

Advanced Search ^

Person Name or ID:

Date of birth range: From To

Gender: Male Female Undisclosed

Registration:

Organisation: Include records within the current organisation:
 Include records within the selected organisation:
 Also include records from child organisations of the selected organisation

[Preview](#)

3. Give the filter a name and description
4. Select the Player Role and Sub Role if needed
Note: it is important to have completed your role management before creating a filter.
5. Select in Organisation Include records within current organisation.
6. Click **Preview**
7. Save filter.

Create a custom person list

A custom list allows the user to customise information that is displayed on screen and be downloaded for easy information retrieval.

1. Go to People/Custom Person List/ Custom List Management
2. Click on **Add New Custom List**
3. Give the list a name and description
4. Select Person Filter (as previously created)

Custom Person List Management

[+ Add New Custom List](#)

Custom Person List Maintenance

[← Back to Custom List Manager](#)

Custom List Title

Custom List Description

Person Filter

Output Fields

Also show:

Custom fields (*)

Player fields (**)

Umpire fields (***)

Address1	+	ID	+
Address2	←	Full Name	↓
Address3			
Birth Country			
Country			
Date Created			
Date of Birth			

Rows per page

Sorting Auto
 Custom...

Available to: All users for this club/assoc
 Logged in user only

[Save List](#)

5. Click on Also show Custom Fields/Player Fields (this displays all the custom questions asked at registration).

6. Select item you would like in your list from Output Fields then click Add – repeat until all fields are in the chosen fields box.
7. Click **Save List** then click on button.

[Custom Person List Maintenance](#) ?

[← Back to Custom List Manager](#)

Custom Person List Management ?

[+ Add New Custom List](#)

Show lists from all owners

TITLE	DESCRIPTION	FILTER	LAST UPDATED	OWNER			
Umpires		Umpire List	23/11/2016 5:18PM	ALL			
President		Presidents	20/09/2016 2:30PM	ALL			

8. To view and download list click on the **eye icon** to open the report
9. Scroll to the bottom of the screen and click on the word **download** to download the report in excel.

[Download](#)

