Reporting

Introduction

Quick Answer

- Login to your Club Control Panel.
- Click the Payments tab.
- Select the ‘Reporting’ option from the left hand menu.

Payment Status

A status is given to each payment so a club can track where that payment is, in the payment lifecycle.

A breakdown of each status is listed below:

Pending

- A payment has been made, you must now wait for the money to clear from the customer's account.

Paid

- The payment has been successfully debited from the customer's account.
- It is being held by GoCardless, pending a withdrawal to the club.

Withdrawn

- The payment has been paid to the club.
- This takes up to one business day to reach the merchant's bank account.

Failed

- The payment could not be debited from a customer's account.
- This is normally due to insufficient funds in the customer's account.

Cancelled

- The payment was cancelled by the club or customer before it was submitted to the bank.

Refunded

- The payment was refunded to the customers bank account.
- The refunded amount will be recovered from future payments to the club.

Part Paid

- The customer has paid part of the bill amount.
- Usually only applies to manually added payments.

Paying

- The customer has an active subscription to your recurring product.

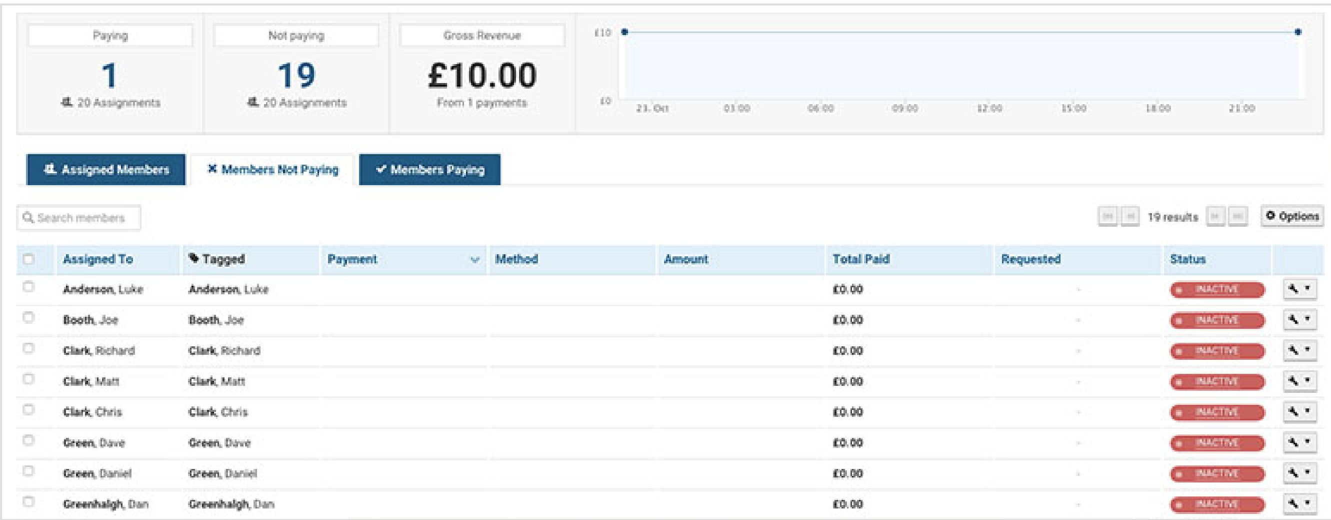
Also note: The club member is the customer and the club is the merchant.

Reporting

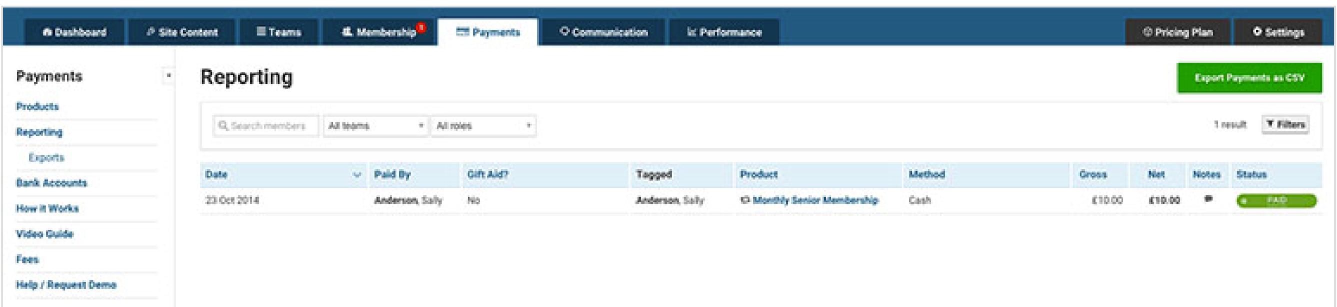
Now that your members have started to make payments, it’s important that you keep tabs on all payments as they come in, so that you can maximise your potential income.

There are two ways to keep tabs on those that have and haven’t paid.

1. Use the ‘Members paid’ and ‘Members not paid’ tabs within each product area to see who has and hasn’t paid for each product - this is perfect if you originally assigned members to the product.



2. Use the reporting and filter tools to see a full breakdown of all payments.



To use the reporting tools, first you will need to login to your Club Control Panel and click on the ‘Payments’ tab.

To use the reporting tools, first you will need to login to your club Control Panel and click on the 'Payments' tab.

Select the 'Reporting' option from the left hand menu.

Here you will see a list of all payments, with columns listed for:

- Date of payment
- Paid by
- Gift aid (yes/no)
- Members tagged to the payment
- The product they have paid for
- The method of payment
- The gross amount of the payment
- The net amount of the payment (after any transaction fees)
- A note (if applicable)
- The payment status

As well as seeing a list of all payments, you are able to filter this data to find payments from a particular person or group of people.

To search by name, simply start typing the member's name in the search box directly above the reporting table. The results will update as you type.

To find members of a particular role or team, you can use the quick filters next to the search box.

For example, to search for all payment records by 1st team players, simply click the 'All teams' drop-down menu and select only the 1st team from your available teams.

Then click the 'All roles' drop-down menu and select only the 'Player' role.

The reporting page will update automatically to show you all payments made by players of your 1st team.

Filters

Admins can also use advanced filters to find members that meet your set criteria. This can be members that have paid for a particular product or members that have provided you with info for a custom membership field.

To use the extra filters, click the 'Filters' button towards the top right of the reporting screen.

Click the 'Select filter type' drop-down and select the filter from the list. If you want to filter for payments for a particular product, select the 'Product' option from the list.

A product box should appear with the word 'All' already selected. Click the 'All' button to see a list of all products available. Click on the product you want to filter for and click the 'Filter' button when ready.

Exporting

At any point during the reporting process, you are able to export the payment data to an excel spreadsheet in csv format - great for sending to club officials not listed as an admin on the site.

To export the full list of payments, clear all filters and click the green ‘Export Payments as CSV’ button towards the top right of the page.

Give the report a name in the export overlay that appears and click the green ‘Save’ button.

You’ll then be taken to a ‘Payments Exports’ page, where the export will be added to a queue of pending exports. Depending on the size of the report, this should be made available very quickly.

You will receive an email when the export is ready, but in most cases refreshing your page will show you whether the export is available to download.

When the download is available, you will be able to click on the name of the payments export to open your CSV export.