

A woman in a black athletic jacket and cap, wearing sunglasses and earbuds, is celebrating with her arms raised in the air. She is wearing a race bib that says "OneAmerica 500 Central MINI-MARATHON". In the background, other runners are visible, some also celebrating. The scene is set outdoors on a paved path.

RunSignup
Reporting Tools

July 20, 2023

Housekeeping Notes

- **This session is being recorded.** We will send out the recording and slides via email tomorrow, as well as post them on:
 - **Our Website:** RunSignup.com >> Knowledge Base >> Webinars & Events
 - **Our YouTube Channel:** YouTube.com/RunSignup
- **Ask questions!** Use the “Questions” section of your GoToWebinar module (usually on the right side of your screen) to ask questions throughout.
 - Questions will be monitored and answered in writing throughout
 - Key questions may be asked out loud at the end of the webinar
 - Any questions that are not addressed will be followed up on after the webinar



Thank you for joining us!

● ● ● Agenda

Today's Agenda

All Reports!

- Dashboard Reports
- Participant Reports
- Fundraising Reports
- Marketing Reports
- Financial Reports
- RaceDay Reports





Dashboard Reports



Dashboard Data

Dashboard was covered extensively in June, so this is just a quick recap of a few favorites....

- Total Signups
- Total Registrations
- Registration by Event
- YOY comparisons
- Last 30 Days*
- Days remaining*

Colorado Springs Marathon, Half, 5K, and Kids K

September 30, 2023 Colorado Springs, CO 80903 Race Status: View Website Signups: 1,224

	THIS YEAR	LAST YEAR	YEAR BEFORE LAST
Total Registrations	1,224	2,190	1,448
Marathon	320	344	179
Half Marathon	547	969	700
5K	282	669	362
Kids K	41	90	76
Virtual Marathon	3	10	9
Virtual Half Marathon	7	30	26
Virtual 5K	5	53	73
Virtual Kids K	2	4	3
Team RWB Relay (Invite Only)	17	20	20
Today	6	4	2
Yesterday	9	13	0
Last 7 Days	50	46	4
Last 30 Days	368	230	4
With 107 Days Remaining	1,224	676	4
Total \$	\$75,237.20	\$131,230.80	\$72,049.65

TYPE	#
Paid Online	1,144
\$0 Entry	80
Imported	0

Paid Online is the number of active registrants who paid more than \$0.00 to enter this race.
\$0 Entry is the number of active registrants who paid \$0.00 to enter this race.
Imported is the number of registrants who were imported.
 For more detailed reporting, please use the Participant Report.

Note: These figures do not take into account post-registration actions, including transfers.

Dashboard Anatomy

Menu Search

"Home"

Registration Breakdown

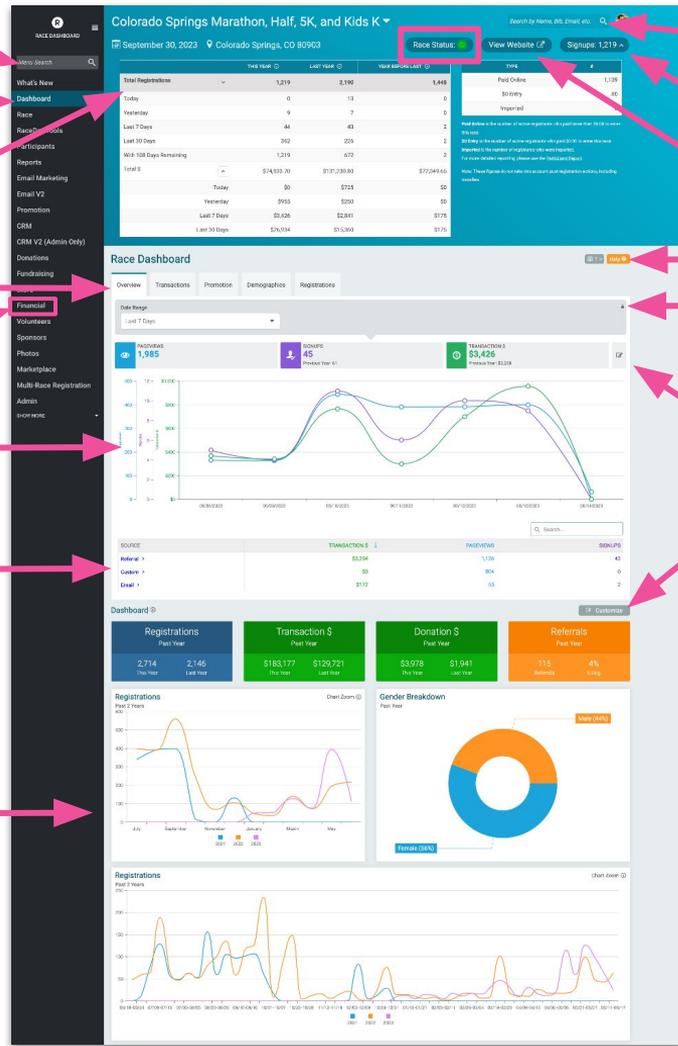
Detail Tabs

Financial Reports

Dashboard Graphs

Source Tracking

Charts



Participant Quick Search

Total Signups

Public Site Link

HELP

Analytics Access

Customize



Participant Reports



 RunSignup

 TicketSignup

 GiveSignup

View Participants

- Primary way to view your participants in your race
- Participant management can occur here as well
 - Refunds
 - Deferrals
 - Transfers
 - Info edits

The screenshot shows the 'View Participants' interface. At the top, there's a title 'View Participants' and a 'Help' button. Below that, it displays '2023 - Event Name, Event Name 2: 1 Participants'. There are buttons for 'Search/Change Event', 'Report Options', and 'Export Options', along with a 'Save as Custom List & Send Email' button. A 'Page 1 of 1' indicator is present. The main part of the interface is a table with the following columns: REGISTRATION ID, NAME, EVENT, REGISTRATION DATE, GENDER, AGE, EMAIL, T-SHIRT, RACE FEE, AMOUNT PAID, and EDIT REGISTRATION. The table contains one row for a participant named James Armington. The 'EDIT REGISTRATION' column has three buttons: 'Edit', 'Manage', and 'Profile'. A blue box with the number '1' is located below the table.

REGISTRATION ID	NAME	EVENT	REGISTRATION DATE	GENDER	AGE	EMAIL	T-SHIRT	RACE FEE	AMOUNT PAID	EDIT REGISTRATION
72601191	James Armington	Event Name	07/19/2023 5:40pm MDT	Male	37	james.armington@runsignup.com		\$0.00	\$0.00	Edit Manage Profile

View Participants: Search/Change Event

- Configure your report by using the Search/Change Event Button
 - Event drop down box can be used to pull archived data or specific events
- **Search All Fields** can be used for more specific searches

Search/Change Event

The screenshot shows the 'Search Participants' form with a dropdown menu open. The dropdown menu is titled 'Search All Fields' and lists several event options: '10/31/2023 Events', 'Event Name', 'Event Name 2', '--- All 10/31/2023 Events ---', '10/31/2022 Events', 'Last Year's 5K', and '--- All 10/31/2022 Events ---'. The '--- All 10/31/2022 Events ---' option is highlighted in blue. The form includes input fields for 'First Name', 'Last Name', 'Bib Number', and 'Registration Date', along with radio buttons for 'Exact Match' and an 'Update Report' button.

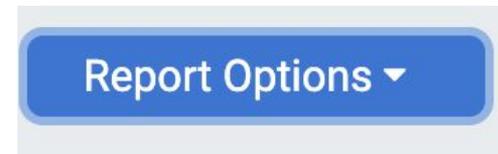
The screenshot shows the 'Search Participants' form with the 'Search All Fields' tab selected. The form is divided into three columns of search criteria: 'Search Common Fields' and 'Search All Fields'. The 'Search All Fields' column includes fields for 'Gender', 'Country/State', 'Date of Birth', 'Registered Since', 'Registered Until', 'Registration Status', 'Beginning Registration ID', 'Ending Registration ID', 'Imported', 'Starting Bib Number', 'Ending Bib Number', 'Team Fundraiser ID', 'With Online Payment', 'Checked In', 'Group/Team ID', 'Single Use Reserved Entry Code', and 'Multiple Use Reserved Entry Code'. The 'Update Report' button is visible at the bottom.

View Participants: Report Options & Export Options

- Customize your participant report by using **Customize View**
 - **Pick From All Columns** will allow you to add fields to your report
 - Save selected columns to always show by default (per user)
- All boxes that are orange will be added to the report when you update

Make this the default report I see when I'm logged in.
Some race specific settings will not be included in the default.

Update Report Cancel



View Participants

2023 - Event Name, Event Name 2: 1 Participants

Search/Change Event Report Options Export Options Save as Custom List & Send Email

Build Custom Report

Pick Common Columns to Display Pick From All Columns

<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Event	<input type="checkbox"/> Registration Date
<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> Age	<input type="checkbox"/> Email Address
<input type="checkbox"/> Street Address	<input type="checkbox"/> Bib Number	<input checked="" type="checkbox"/> T-Shirt
<input checked="" type="checkbox"/> Race Fee	<input checked="" type="checkbox"/> Amount Paid	<input type="checkbox"/> Offline Payment Amount
<input type="checkbox"/> Country		
<input checked="" type="checkbox"/> Registration ID	<input type="checkbox"/> Registration Status	<input type="checkbox"/> Results URL
<input type="checkbox"/> Chip Number	<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Phone
<input type="checkbox"/> Checked In Status	<input type="checkbox"/> Reward Code	<input type="checkbox"/> Registration Add Ons
<input type="checkbox"/> Store Purchases	<input type="checkbox"/> Waiver Signed	<input type="checkbox"/> Registration Notes
<input type="checkbox"/> Reserved Entry Code	<input type="checkbox"/> Shipping Address	<input type="checkbox"/> Country
Financial <input type="checkbox"/>		
<input type="checkbox"/> Paid Online	<input type="checkbox"/> Payment	<input type="checkbox"/> Imported
<input type="checkbox"/> Transfer	<input type="checkbox"/> Transfer Fee	<input type="checkbox"/> Transferred Coupon
<input type="checkbox"/> T-Shirt Cost	<input type="checkbox"/> Race Profit	<input type="checkbox"/> Event Transfer Credits
<input type="checkbox"/> Race Transfer Credit	<input type="checkbox"/> Multi-Event Discount	<input type="checkbox"/> Processing Fee
<input type="checkbox"/> Processing Fee Paid by User	<input type="checkbox"/> Processing Fee Paid by Race	<input type="checkbox"/> Other Fees
<input type="checkbox"/> RaceJoy Payment	<input type="checkbox"/> Shipping Charge	<input type="checkbox"/> Partner Fee
<input type="checkbox"/> Affiliate Profit	<input type="checkbox"/> Extra Fees	<input type="checkbox"/> Amount Paid Later
<input type="checkbox"/> Multi-Person SignUp Pricing	<input type="checkbox"/> Coupon	<input type="checkbox"/> Coupon Tags

Report Options Export Op

Search/Change Event

Customize View

Save Report

View Saved Reports

Summary Info

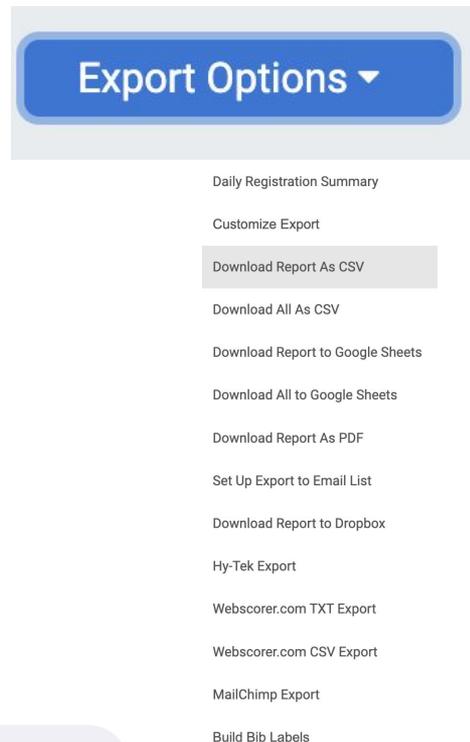
View Imports

Hidden Fields [↗](#)

Graphical Reports [↗](#)

View Participants: Report Options & Export Options

- Export your report to .csv, .xlsx, .pdf etc by using **Export Options**
- **Daily registration summary**
 - Pulls a detailed report of registrations by day per event
- Build Bib labels
- Mailchimp Export



View Participants: Pro Tip

- Commonly overlooked option in Report Options is “hidden fields”
- Useful fields for advanced reporting can be added to your Customize View options
 - Is Anonymous
 - Checkin app information
 - Postponement decisions

Dashboard

Hidden Participant Fields

On this page, you can enable participant report fields that are hidden by default. Enabling a field enables it for the race, reg.

Enabled Fields

- User ID
- Is Anonymous
- Do Not Deliver
- Unsubscribed from Email Marketing
- Fundraiser ID
- Team Fundraiser ID
- Is Fundraiser Team Captain?
- CheckIn App Information
- Amount Reductions
- Transaction ID
- Discount for Minimum Donation
- Timer Fees
- Partner Fees
- Result Notifications
- No. Years (Match by Name/DOB/Sex)
- No. Years (Match by Name)
- No. Years (Match by Name/Email)
- Club Discount Membership ID
- Club Discount Member No.
- Race Postponement/Cancellation Decision Info
- Race Registrant File Upload
- Legacy Sales Tax

Report Options ▾

Export C

Search/Change Event

Customize View

Save Report

View Saved Reports

Summary Info

View Imports

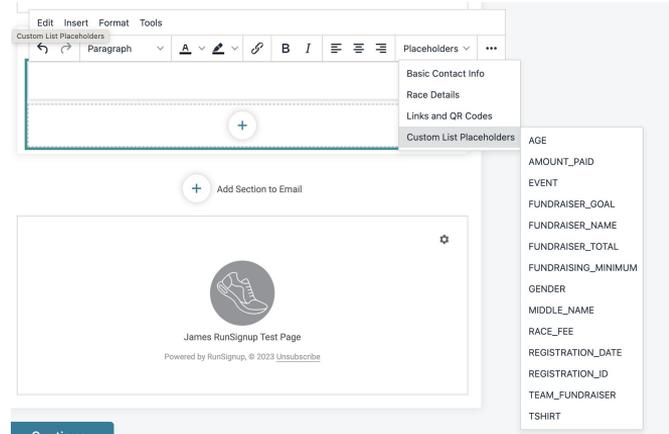
Hidden Fields [↗](#)

Graphical Reports [↗](#)

View Participants: Save as Custom List & Send Email

- Once a report has been configured, you can quickly create a custom list from that report for use in Email V2
- The various columns in your report can be pulled into an email as placeholders
- **Example:** Use filters and Search/Change Event to select last year's 5K and 10K participants who registered between 10/1 and 10/31, then create a custom list of those participants for marketing

Save as Custom List & Send Email



Participant Info Changes

- Participant information changes are recorded in the Participant Information Changes report
- This will track any change in participant information made by a race director or participant

Dashboard Help

Participant Information Changes

This report lists changes made to participants after registering.
This report only contains data from late January 2017 onward.

If you would like to sync your current race participants with their current profile information, [click here](#).

Start Date: End Date:

[Update Report](#)

PARTICIPANT	CHANGE DATE	CHANGES	EDITOR	REGISTERED EVENTS
Jim Armington james.armington@runsignup.com 555-555-5555	07/19/2023 11:20pm	first_name: James → Jim	67.166.33.182 James Armington james.armington@runsignup.com	Event Name – 2023

[Download as CSV](#)

Participants

Not Registered

- Not registered report will allow reporting on participants who have made changes to their races
 - Race Transfers
 - Participant Transfers
 - Deferrals
 - Refunds
 - Dropouts
 - Incomplete registrations
- This is a great way to check up on the participants who are no longer in active standing in the race
 - Deferral report can track who has claimed a deferral.

The screenshot shows a 'Reports' menu with the following items: Participants, Not Registered (highlighted with a white arrow), Giveaways/Add-ons, Group/Team Reports, Donation Reports, Shipping Charge Reports, Marketing Reports, and USAT Reports. To the right of the menu, a list of reports is displayed: Waiting List, Refund Report, Conditional Refunds Report, Transfer Report, Deferred Registrations, Dropout Report, and Incomplete Registrations. A text box above the list states: 'This report lists changes made to part' and 'This report only contains data from late Ja'.

Giveaway Report

- Giveaway report can be used to track giveaways that have been selected by registrants in your race
 - This can be an all race view or by event
- This can also be used to track historical giveaway data
- Giveaway projection can help plan for orders



Add Ons Report

- Add-Ons report can be used to track purchased add ons in your race
 - You can choose to display active Add-Ons only or include archived add-ons
- Each Add-On can be drilled into for specific reporting and downloads

Race Add-ons & Swag Report 1 [Help](#)

Start Date: America/New_York Time | End Date: America/New_York Time | Registration Status: | Exclude Archived: Exclude archived add-ons.

[Search](#)

Please note that this report may not include data from the past few minutes.

ADD-ON / SWAG	CURRENT PRICE	NO. PURCHASED	TOTAL PURCHASE AMOUNT	IS REWARD	AVAILABLE
Shipping	\$7.50	16	\$120.00	No	No
Test (Archived)	\$0.00	0	\$0.00	No	No

Race Add-ons & Swag Report 0 [Help](#)

Test Swag

Start Date: America/Denver Time | End Date: America/Denver Time | Grouping: Break quantities and options out by event.

[Search](#)

Please note that this report may not include data from the past few minutes.

Quantities Purchased
Does not include registrants that didn't make a purchase.
No Purchases

Overall Summary
Quantity Available: ∞
Quantity Purchased: 0

Option Quantities Purchased
No Purchases

Option Summary

OPTION	QUANTITY AVAILABLE	QUANTITY PURCHASED	QUANTITY REMAINING
Small	∞	0	∞
Medium	∞	0	∞
Large	∞	0	∞

[Download Add-ons For Registrations](#)

Only active registrations are included. [Click here to download for all registrations.](#)

Add Ons Report

- Specific add-on reports include quantities purchased
 - Can be configured by date
- Download the specific add-on information to a report

Race Add-ons & Swag Report 0 [Help](#)

Test Swag

Start Date: 11/19/2019 America/Denver Time End Date: mm/dd/yyyy America/Denver Time Grouping: Break quantities and options out by event.

[Search](#)

Please note that this report may not include data from the past few minutes.

Quantities Purchased
Does not include registrants that didn't make a purchase.
No Purchases

Option Quantities Purchased
No Purchases

Overall Summary
Quantity Available: ∞
Quantity Purchased: 0

Option Summary

OPTION	QUANTITY AVAILABLE	QUANTITY PURCHASED	QUANTITY REMAINING
Small	∞	0	∞
Medium	∞	0	∞
Large	∞	0	∞

[Download Add-ons For Registrations](#)

Only active registrations are included. [Click here to download for all registrations.](#)

Add-ons

Purchase Report & Return Report

- Add-Ons Purchases report shows the transactions that have occurred with add ons included
- Add-ons returns report shows add-ons that have been removed from a participant who has removed an add on from their registration

Race Add-ons Purchases Report

Purchases Starting * Purchases Ending * Exclude Archived Exclude archived add-ons

Please note that this report may not include data from the past few minutes.

TRANSACTION ID	REGISTRATION ID	ADD-ON / SWAD	ADD-ON OPTION	ADD-ON PRICE	ADD-ON OPTION PRICE	NO. PURCHASED	TRANSACTION TOTAL
ay_RQ856Z9JNC84V62_0	67010650	Shipping		\$7.50	\$0.00	1	\$7.50
ay_L7NL82VBQCLLHK42_0	68798700	Shipping		\$7.50	\$0.00	1	\$7.50
ay_KHCMB64PW4H6SP42_0	68823594	Shipping		\$7.50	\$0.00	2	\$15.00
ay_WGLFK3MVGQCLLHK42_0	68886931	Shipping		\$7.50	\$0.00	1	\$7.50
ay_WQMF398W7284V62_0	68954160	Shipping		\$7.50	\$0.00	1	\$7.50
ay_LJNGSPRDF3PNT872_0	69118258	Shipping		\$7.50	\$0.00	1	\$7.50
ay_ZZVWLGPSRS7WTM42_0	69326609	Shipping		\$7.50	\$0.00	1	\$7.50
ay_16C2ZLPSRS7WTM42_0	69326760	Shipping		\$7.50	\$0.00	1	\$7.50

Store Report

- Store report can be used to track store items that have been purchased in your race by date range
 - Store items are separate from add-ons
 - Add-ons are only offered during registration
- Report can be exported to .csv using the blue button

Download as CSV

Store Summary

Orders Starting: 03/06/2023

Orders Until: mm/dd/yyyy

Pacific/Honolulu Time

[Search](#)

Purchased Items
No Items Purchased

Item Inventory

Note: This report does not consider the dates in the search above.

ITEM	OPTION	PURCHASED	NO. OFFERED	CURRENTLY AVAILABLE
<input type="text"/>	ANY	243	Unlimited	∞
Item	X Small	21	31	10
	Small	12	12	0
	Medium	56	228	172
	Large	78	242	164
	XL	67	131	64
	XXXL	9	31	22
<input type="text"/>	ANY	195	Unlimited	∞
	XS	3	3	0
	Small	32	434	402
	Medium	59	734	675



USAT Reports

- Triathlons can take advantage of our API connection with USAT to pull waiver signature information from their participants
- USAT reports also track membership sales information in the race
 - All money received for USAT memberships is sent directly to USAT

USAT Waiver Signatures 1 | Help

This report lists all participants and indicates if they have signed the USAT waiver online. If you are a USAT sanctioned event, please be sure to have participants sign paper waivers prior to the event if they have not signed online. *Note that all participants prior to Dec. 18th, 2014 would be required to sign the waiver if you marked the event with a USAT specific membership, but since they did not meet the stricter USAT requirements for signing the waiver, they are marked here as not signed.*

Search/Change Event
Change Year ▾

REGISTRATION ID	PARTICIPANT	REGISTRATION DATE	SIGNED DATE	IP ADDRESS	SIGNATURE	WAIVER VERSION
-----------------	-------------	-------------------	-------------	------------	-----------	----------------

USAT Membership Summary 1 | Help

This report lists all new memberships sold for this race. We've left empty boxes so you can fill in memberships that you handled outside of RunSignup. *Note that this report does not include data prior to Dec. 18th, 2014 because the original USAT integration did not provide us with this information.*

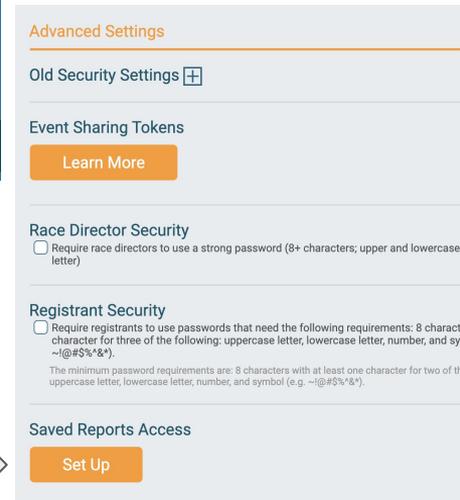
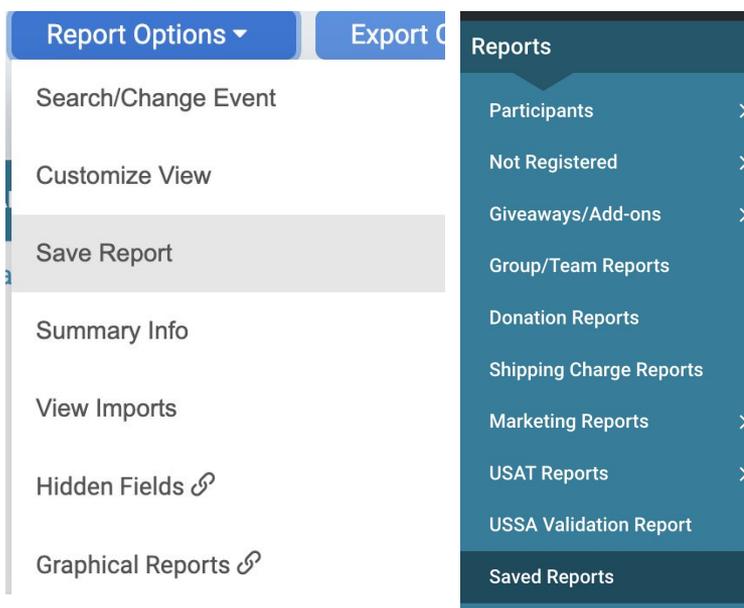
Change Year ▾
Filter ▾

USAT EVENT ID	MEMBERSHIP TYPE	SOLD ONLINE		PAPER ENTRIES		TOTAL	
		YOUTH	ADULT	YOUTH	ADULT	YOUTH	ADULT
307546	Transferred One-Day License	0	177				
		\$0.00	\$0.00				
307546	Existing Membership	0	1				
Total		0	178				
		\$0.00	\$0.00				

USAT EVENT ID	MEMBERSHIP TYPE	TOTAL AMOUNT
307546	Existing Membership	66 \$0.00
307546	Membership Option #1: 1-Year Adult Annual Membership	12 \$600.00
307546	Membership Option #3: 3-Year Adult Annual Membership	2 \$270.00
307546	Membership Option #47: Global Event License Membership	181 \$2,715.00
307546	Membership Option #54: Youth and Junior Digital Membership	6 \$60.00
307546	Membership Option #55: Young Adult Annual Membership	1 \$36.00
Total		288 \$3,681.00

Saved Reports

- Participant Reports can be saved for easy access in the future.
- Using Secure Access / Info Sharing, access to these reports can be assigned to individuals
 - This is a great way to give your partners access to information that they can pull themselves





Fundraising Reports



 RunSignup

 TicketSignup

 GiveSignup

Donation Reports: Search

- Search for donor details to find a specific donation
 - Name, email, date and amount
- Donation Period is used to search for a specific race year's donations
- Donation status can show donations in non-active or active status
- Search on fundraiser to see their donations

The screenshot shows a search interface for 'Donations' under the 'Race Donations' category. It includes several search filters: 'First Name', 'Last Name', 'Email Address', 'Donations Starting' (with a calendar icon), 'Donations Ending' (with a calendar icon), 'Donation Period' (a dropdown menu), 'Donations Greater Than' (with a dollar sign and input field), 'Donations Less Than' (with a dollar sign and input field), 'Fundraiser Type' (a dropdown menu), and 'Fundraiser Name'. A 'Search' button is located at the bottom left. A 'Donation Status' dropdown menu is open on the right, showing options: 'Active', 'Cleared/Refunded within 15 Minutes', 'Refunded', and 'Non-cleared, Non-manual'. A status message at the bottom indicates: 'Only showing donations for donation period starting on Tuesday March 17, 2020.' Arrows from the text on the left point to the 'Donations Starting' field, the 'Donation Period' dropdown, the 'Donations Greater Than' field, the 'Fundraiser Type' dropdown, and the 'Fundraiser Name' field.

Donation Reports: Search

- Donation management can be conducted using this report
 - Click the blue edit button to make donation adjustments
 - Resend donation confirmation emails

Edit Donation

0 Help

Update Donation from James Armington

Donation Amount: \$5.00

On Behalf Of

Name Of Donor

Anonymous

Fundraiser

Notes

Update Donation

Back to Donations List

Donations List

Donation ID	Name	Amount	Amount Paid	Processing Fee	Amount After Fees	Transaction ID	Donation Level	Fundraiser	Fundraiser Team	Charity	Donation Date	Manual Entry	Status	Anonymous	On Behalf Of	Matching Gift	Is Gift Match?	Phone	Email	Address	Edit	
6453859	James Armington	\$5.00	\$5.00	\$0.00	\$5.00						05/10/2023 12:00am MDT	Yes	Active	Yes	On Behalf Of	✔	No		james.armington@runsignup.com Resend Confirmation Email	US	Edit	
6075728	Test Test	\$5.00	\$5.00	\$0.00	\$5.00			James test \$5.00			01/12/2023 5:51pm MST	Yes	Active	Yes	On Behalf Of test	✔	No					Edit
3301661	James Armington	\$1.00	\$1.00	\$0.00	\$1.00						04/20/2020 10:00pm MDT	Yes	Active	No	On Behalf Of James Armington	✔	No	555-555-5555	james.armington@runsignup.com Resend Confirmation Email		Edit	

Donation Reports: Actions

- Export your report to .csv, .xlsx, google sheets
 - Download report or download all
- Summary Emails can be used to set up Daily and Weekly donation summary emails
 - This can help your staff stay informed on donations as they are received

Fundraisers & Team Fundraisers

- Search for individual and team fundraisers using Fundraiser Type
- Edit a fundraiser by clicking the blue edit button associated with the fundraiser
- Download your list of fundraisers by using the .csv, .xlsx and print links

Fundraisers

Donation Period

Fundraiser Type

Charity

Fundraiser Name

0 Help

Update Report

Fundraisers

Number of Individual Fundraisers: 1

Number of Team Fundraisers: 0

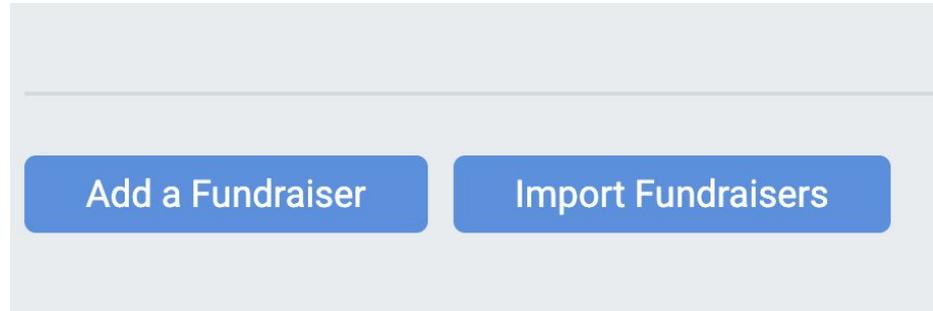
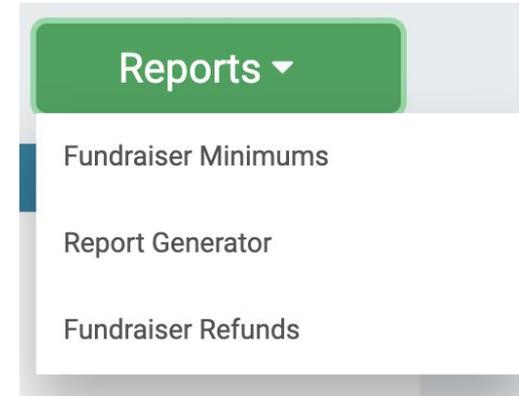
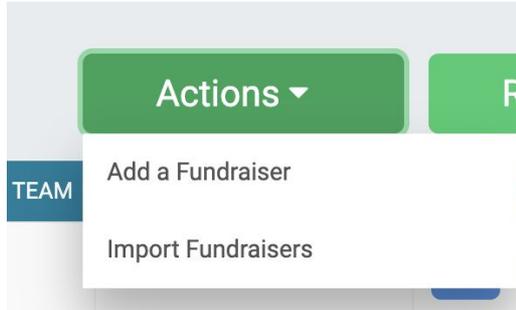
Actions
Reports

FUNDRAISER	FUNDRAISER TYPE	LINKED REG. ID	CAPTAIN	CHARITY	GOAL	DONATIONS	COLLECTED	TEAM	INCLUDED FUNDRAISERS	FUNDRAISER ACTIONS
#559806 James Armington View Donations	Individual	42742364	James Armington		\$200.00	3	\$551.00 275.5% of goal			Edit View Delete

[Download as CSV](#) | [Download as Excel File \(XLSX\)](#) | [Print](#)

Fundraisers & Team Fundraisers

- Actions button
 - Add a fundraiser
 - Import fundraisers
- Reports button
 - Quickly access Fundraiser Minimums, Report Generator and fundraiser report



Fundraiser Report Generator

- Report Type
 - Captains
 - Configured to show captain contact information for teams
 - Top Fundraisers
 - Configured to show a list of fundraisers or teams by size or donation amount

Reports

Fundraiser Report Generator

Donation Period *
Tuesday March 17, 2020

Report Type *
Captains

Fundraiser Type
--- Any ---

Individual or Team?
--- Any ---

Report Details *
Team Name, Administrator Name & Ei

Additional Columns
 Include team size
 Include donations
 Include administrator contact info

[Generate Report](#) [Preview Report](#)

Reports

Fundraiser Report Generator

Donation Period *
Tuesday March 17, 2020

Report Type *
Top Fundraisers

Fundraiser Type
--- Any ---

Individual or Team?
--- Any ---

Sort By *
✓ Team Size
Donation Amount

Number of Top Fundraisers *
5

Fundraiser Report Generator

- **Preview Report** button
 - Allows you to see the results of your report before exporting
- **Generate Report**
 - Exports your report to a .csv for use in excel

Fundraiser Report Generator

Donation Period * Report Type *

Tuesday March 17, 2020 Top Fundraisers

Fundraiser Type Individual or Team?

-- Any -- -- Any --

Sort By * Number of Top Fundraisers *

Donation Amount 10

Generate Report
Preview Report

FUNDRAISER ID	FUNDRAISER NAME	TEAM FUNDRAISER?	FUNDRAISER TYPE	TEAM SIZE	DONATIONS	CAPTAIN FIRST NAME	CAPTAIN LAST NAME	CAPTAIN EMAIL
565696	BoldeReach .	No			\$10,900.00	BoldeReach	.	
559806	James Armington	No			\$551.00	James	Armington	james.armington@runsignup.com

Fundraisers

Refund Report

- If Fundraiser rewards are being used, refund report will display earned refunds by fundraiser
 - Note, your fundraisers must be linked to a registration ID for refund
 - Fundraiser report can manually link to a Registration ID and opt in for rewards

Refund Report

Fundraiser Refund Report

Change Year ▾

REGISTRATION ID	PARTICIPANT	FUNDRAISER	REFUND INITIATED DATE	REFUND AMOUNT
#71050493			07/18/2023 7:31pm EDT	\$30.00
#71484491			07/19/2023 1:31pm EDT	\$33.00

May be less depending on fundraiser refund rules.

FUNDRAISER ACTIONS

Edit View Delete

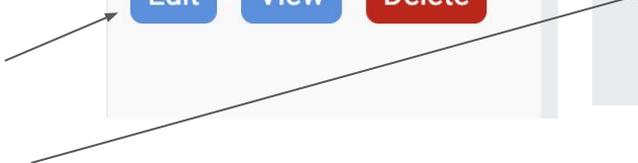
Linked Registration ID

669154 [Go to Registration](#)

Important: Once this is set, the value can NOT be updated.

Applied for fundraiser refund.

Only applicable if a registration ID is set.



Fundraiser Minimums

- Report on fundraisers who have met or have not met their minimums
- Actions button at bottom of report page
 - Used to send reminder emails
 - Invoice registrants
 - Charge registrations

Fundraiser Minimums Report

Generate Report

Donation Period
Tuesday January 3, 2023

Report Generation Options
 Default to goal if fundraising minimum is not set.

Registrations in Donations Display Options
Do not include registrations in donations

Tax deductible amount for registrations based on the [tax deduction rules](#).

[Update Report](#)

Fundraiser Minimums Report as of 7/20/2023 9:36am EDT

- Hide fundraisers that have met their requirement.
- Hide fundraisers that have NOT met their requirement.
- Hide fundraisers whose team has met their requirement.
- Show team details.
- Hide deleted fundraisers.

Download All as CSV Page 1 of 1

1

Download Full Information as CSV

✓ (Select an Action)

- Email Reminders
- Remove Registrations
- Invoice Registrants
- Charge Registrants
- Retry Invoice Payment (Admin Only) - Do NOT Retry Multiple Times!



Marketing Reports



Referral Report

- Track referral activity in your race
 - Report Type
 - Referral Codes
 - Referred Registrations
- Manually add Referrals
- Manually trigger refunds
- Download report

Referral Codes 0 Help

Report Type: Referral Codes

Description:

Email:

Referral Code:

Referrals Since: mm/dd/yyyy

Referrals Until: mm/dd/yyyy

Event:

Codes Created Since: 11/19/2019

Codes Created Until: mm/dd/yyyy

Note that the creation date on referral codes created prior to 7/7/2015 are approximated or marked as created on 7/7/2015 when the no approximation can be found.

[Search](#)

[View Summary](#)

DESCRIPTION	TYPE	EMAIL	CODE	REGISTRATION ID	RACE PAGE VIEWS	SIGNUP PAGE VIEWS	COMPLETED REGISTRATIONS	REFERRAL REFUNDS	REFERRAL REWARDS	ACTIONS
Charlotte Armington	User	charlotte.armington@gmail.com	oswFmsG6	69704314	0	0	0	0	0	Edit Delete Link

Report Type: Referred Registrations

Registrations Since *: 07/01/2023

Registrations Until *: 07/31/2023

Event *:

[Download Report](#)

[Manually Add Referred Registration](#)

[Trigger Registration Refund Check](#)

Coupons

- Search for coupon use in your race
 - Date used
 - Date created
 - Expiry date
 - Coupon code
- Coupon Summary
 - Shows summary usage information across the entire race

Report
0 ▾ Help

Report Settings

Please note: these reports include registrations and purchases that may have been cleared or refunded.

Report Type

Overall Coupon Summary

Summary by Coupon

Exclusion Options

Exclude shared races from report.
If unchecked, coupon uses from races that share your coupons will be included.

Exclude free transactions.
This is useful when comparing against payment reports.

Coupon

Coupon Used Since

America/Denver Time

Quick Dates ▾

Coupon Created On or After

America/Denver Time

Coupon Expires On or After

America/Denver Time

Coupon Used Until

America/Denver Time

Coupon Created On or Before

America/Denver Time

Coupon Expires On or Before

America/Denver Time

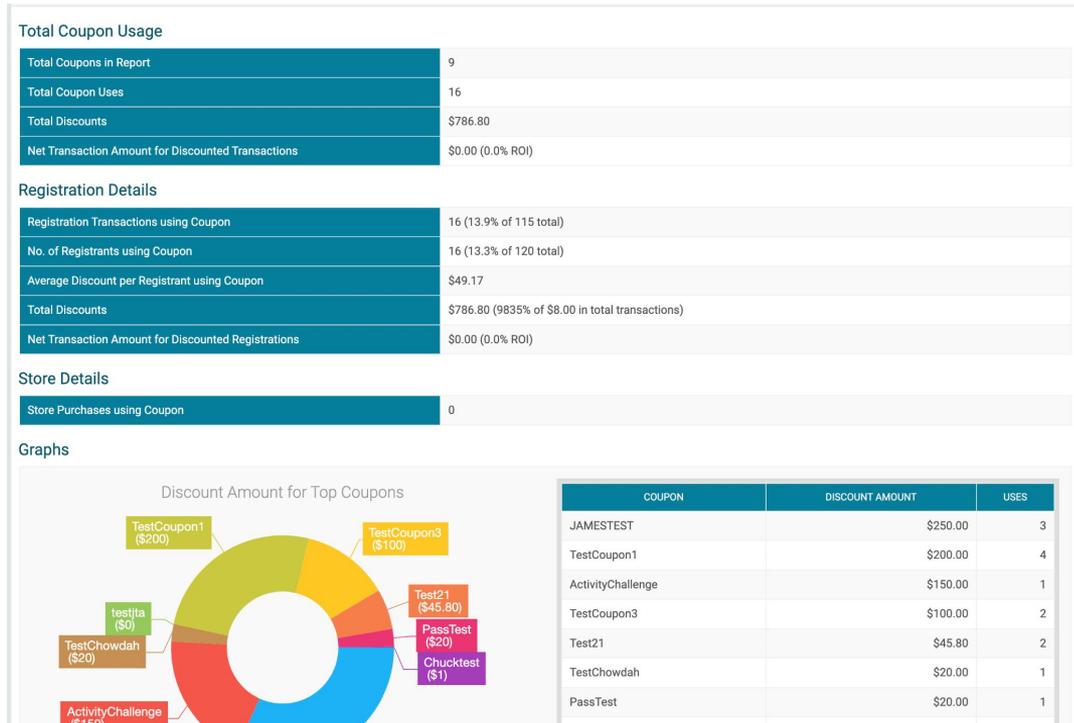
Tag(s)

(Any Tag)

Build Report

Coupons

- Summary report display
 - Total usage
 - Total discounts
 - How much was discounted
 - Number of registrations involving a coupon
- Graphical reporting
 - Provides a quick snapshot of coupon use in your race



Coupons

- Summary by coupon
 - Displays summary information for each coupon used
- Handy way to see how much certain coupons have been used
 - Providing discount amount
 - Registrations used in
 - Percentage of registration used
- Export at bottom with download link

By Coupon

COUPON	TAGS	NO. OF USES	NO. OF REGISTRATION USES	TOTAL DISCOUNT	TOTAL BEFORE DISCOUNT	% OFF LIST PRICE	TOTAL NO. OF REGISTRATIONS	% WHO USED COUPON
JAMESTEST		3	3	\$250.00	\$250.00	100%	120	2.5%
TestCoupon1		4	4	\$200.00	\$200.00	100%	120	3.3%
ActivityChallenge		1	1	\$150.00	\$150.00	100%	120	0.8%
TestCoupon3		2	2	\$100.00	\$100.00	100%	120	1.7%
Test21		2	2	\$45.80	\$45.80	100%	120	1.7%
TestChowdah		1	1	\$20.00	\$20.00	100%	120	0.8%
PassTest		1	1	\$20.00	\$20.00	100%	120	0.8%
Chucktest		1	1	\$1.00	\$1.00	100%	120	0.8%
testjta		1	1	\$0.00	\$0.00	0%	120	0.8%

Download All as CSV Page 1 of 1

Coupons Pro Tip

- Coupon tag feature is a great way to provide for easy reporting for your coupons
- When building coupons in your race, consider using Tags to make reporting easier
 - For sponsor codes, use a SPONSOR tag on all created coupons
 - This will allow a quick report to be built for you using tags

Report Settings

Please note: these reports include registrations and purchases that may h

Report Type

- Overall Coupon Summary
- Summary by Coupon

Exclusion Options

- Exclude shared races from report.
If unchecked, coupon uses from races that share your coupons will be included.
- Exclude free transactions.
This is useful when comparing against payment reports.

Coupon

Tag(s)

Coupon Code *

To add multiple coupons, separate codes with commas.

Upload Text File

No file chosen

You can upload a text file with each code on a separate line. Limited to 1,000 coupons at a time.

Discount * G

On \$100, th

Coupon Starts *

: AM

America/Denver Time

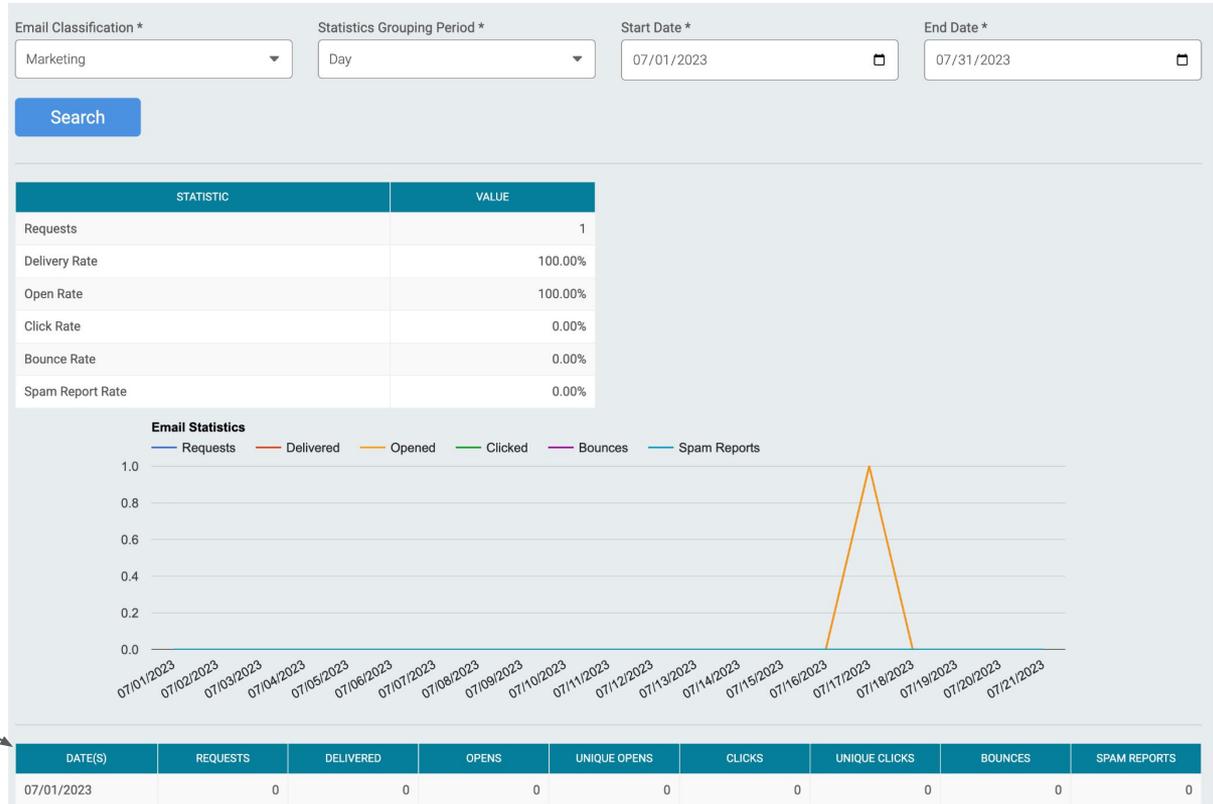
Coupon Expir

mm/dd/yy

Tags

Email Statistics

- Reporting **by day** on emails sent through Email V2
 - Shows Open rate
 - Click rate
 - Bounce
- Graph displays information visually
- Email sends, deliveries and clicks can be seen broken out by date at the bottom of the report





Financial Reports



Financial Summary

- Starting point for financial reporting

Totals		
TYPE	EXPLANATION	TOTALS
Transactions	Total Credit Card Payments for your race.	+\$28,465.12
Transaction Processing Fees	Processing fees paid to RunSignup for your race.	-\$1,939.33
	Sales tax remitted by RunSignup, Inc.	-\$13.13
	Directly Paid Charity Donations	-\$215.00
Refunds	This includes any refunds made for your race (e.g. registration refunds, store purchase refunds, etc.)	-\$0.00
	Refund Processing Fees	-\$0.00
Holdbacks	Funds being held for your race, primarily for refunds and chargebacks. ⓘ We require all events to have a Race Reserve. Details about your Race Reserve can be found here .	-\$564.80
Adjustments	See the description on each adjustment for more details.	+\$0.00
Owed to Race	Net Owed to Race	+\$25,732.86
Payments	Checks and Direct Deposits Made to the Race.	-\$23,134.71
Balance Owed	Net Owed to Race after Payments Made.	\$2,598.15

Financial Summary

Totals		
TYPE	EXPLANATION	TOTALS
Transactions	Total Credit Card Payments for your race.	+\$28,465.12
Transaction Processing Fees	Processing fees paid to RunSignup for your race.	-\$1,939.33
Sales tax remitted by RunSignup, Inc.	Sales tax paid by RunSignup, Inc. for your race.	-\$13.13
Directly Paid Charity Donations	Donations that were paid directly to the charity instead of going to the race.	-\$215.00

Transactions: Total transactions charged to customers, in real time.

- May not all have settled
- Transactions will disappear with cancellation within 15 minute window

Transaction Processing Fees: RunSignup processing fees + any from the timer or race operator

Sales Tax: Sales Tax that has been collected and remitted on your behalf (for states where sales tax is charged on registrations or merchandise).

Directly Paid Charity Donations: Donations to a charity that have their own payment account linked through the race. This *does not* include any donations the race collects in their own account.

Financial Summary:

Refunds

Refunds	This includes any refunds made for your race (e.g. registration refunds, store purchase refunds, etc.)	-\$0.00
Refund Processing Fees	RunSignup fee for processing refunds.	-\$0.00

Refunds: Any refunded funds

- Refunds initiated by you
- Automated refunds like referral rewards or fundraiser goal refund

Transaction Processing Fees: RunSignup processing fees + any from the timer or race operator

Refund Processing Fee: Former \$1/refund fee for processing refunds; this has been waived since 2020

Financial Summary: Holdbacks

Holdbacks

Funds being held for your race, primarily for refunds and chargebacks.

 Details about your Race Reserve can be found [here](#).

Holdbacks: Reserves to cover any potential refunds or chargebacks

- Required for refund features like Referral Rewards
- Optional to hold more to ensure funds are available for any chargebacks or manual refunds
 - Update Refund Reserve holdback amount via *Participants >> Participant Management >> Refund Reserve*
 - Click in to view the holdback history (money going in and out of the refund reserve)

Financial Summary: Adjustments

Can Include:

- **Chargebacks:** Also shows reversed chargebacks
- **Additions to Refund Reserve - externally**
- **Funds moved from one race to another**
- **Check payment fee (\$10 fee for each check)**

ADJUSTMENT ID	DESCRIPTION	DATE	MONDAY MORNING REPORT	FUNDS TRANSFER ID	ADJUSTMENT AMOUNT
84643	Chargeback (ay_ZVFMXXJGCCLHK42_0) Reason: 4837 - mc 4837: No Cardholder Authorisation Participant Name – Edit	07/11/2022 12:25:01pm EDT	No	Not Yet	-\$200.05
84512	Chargeback (ay_V5WQVNL4RBJNT872_0) Reason: 4834 - mc 4834: Duplicate Processing Participant Name – Edit	07/08/2022 10:49:34am EDT	No	Not Yet	-\$104.65
84424	Reversing chargeback entered on 2022-06-21 16:18:46. – Edit	07/07/2022 4:04:52am EDT	No	Not Yet	\$97.15

Financial Summary:

Owed to Race

Owed to Race	Net Owed to Race	+\$25,987.86
Payments	Checks and Direct Deposits Made to the Race.	-\$23,134.71
Balance Owed	Net Owed to Race after Payments Made.	\$2,853.15

Owed to Race: This is the total of *all items* above it on the report (Not including any holdback)

Payments: This is what's been paid to the race to date

Balance: How much is owed to the race

- Not necessarily amount to be paid in the *next* payment
- View Payment Account information to determine amount to be paid & when

Financial Summary:

Owed to Race

Race Fees: Registration fees paid

Registrations with Add-Ons: Add-on purchases

Registration Coupons: Coupons used against registration/add-on costs

Event Transfer Credits for Previous Registration: When a participant transfers events, "Race Fees" includes the full cost of the new event. This field subtracts out the amount not actually paid because it was credited from the previous registration.

Donations: Donations collected and paid to the Race

Donations Paid Directly to Charity: Donations to charities with linked payment accounts

Detailed Summary

[View Detailed Summary](#)

Detailed Summary

Activity from Sunday March 27, 2022 to Saturday August 13, 2022.

[Show/Hide Quantities](#)

COMPONENT	COLLECTED ONLINE	PAID TO RACE	OWED TO RACE
Race Fees	(544) \$19,663.00	(487) \$17,395.00	(57) \$2,268.00
Registrations with Add-ons	(132) \$2,512.00	(121) \$2,296.00	(11) \$216.00
Registration Coupons	(9) -\$272.00	(0) \$0.00	(9) -\$272.00
Event Transfer Credits for Previous Registration ⓘ	(9) -\$299.00	(3) -\$95.00	(6) -\$204.00
Donations	(186) \$5,163.66	(168) \$4,278.66	(18) \$885.00
Donations Paid Directly to Charity		-\$210.00	-\$5.00
Holdbacks/Refund Reserve	(53) -\$564.80	(43) -\$529.95	(10) -\$34.85
Total Race Profit	Total	Paid to Race	Owed to Race
	\$25,987.86	\$23,134.71	\$2,853.15

Please note that "Total Race Profit" lists the race profit for the current search dates and includes any payments that have already been made.

[Download in Excel](#)

Sales Tax Reports

Summary By State

This table shows the total tax collected per state. It rolls up all jurisdictions (e.g. county and city) into the state.

STATE	REMITTED BY	NUMBER OF SALES TAX TRANSACTIONS	TAXABLE AMOUNT	EXEMPT AMOUNT	TOTAL SALES TAX
US/CA	RunSignup, Inc.	1	\$0.00	\$3.70	\$0.00
US/IN	RunSignup, Inc.	1	\$0.00	\$2.80	\$0.00
US/NJ	RunSignup, Inc.	2	\$0.00	\$7.64	\$0.00
US/PA	RunSignup, Inc.	28	\$0.00	\$1,239.22	\$0.00

Summary By Jurisdiction

This table shows the total tax collected per jurisdiction. Use this to remit your taxes.

STATE	JURISDICTION	JURISDICTION TYPE	REMITTED BY	NUMBER OF SALES TAX TRANSACTIONS	TAXABLE AMOUNT	EXEMPT AMOUNT	TOTAL SALES TAX
US/CA	CALIFORNIA	State	RunSignup, Inc.	1	\$0.00	\$3.70	\$0.00
US/CA	MARIN	County	RunSignup, Inc.	1	\$0.00	\$3.70	\$0.00
US/CA	MARIN CO LOCAL TAX SL	Other	RunSignup, Inc.	1	\$0.00	\$3.70	\$0.00
US/CA	MARIN COUNTY DISTRICT TAX SP	Other	RunSignup, Inc.	1	\$0.00	\$3.70	\$0.00
US/IN	INDIANA	State	RunSignup, Inc.	1	\$0.00	\$2.80	\$0.00
US/NJ	NEW JERSEY	State	RunSignup, Inc.	2	\$0.00	\$7.64	\$0.00
US/PA	PENNSYLVANIA	State	RunSignup, Inc.	28	\$0.00	\$1,239.22	\$0.00
US/PA	PHILADELPHIA	County	RunSignup, Inc.	28	\$0.00	\$1,239.22	\$0.00

[Download as CSV](#)



Event Insurance Report

- Track event insurance purchases here
- Policy
 - What policy was purchased
- Policy ID
 - The ID for that policy
- Shared W/ Race
 - Revenue share
- Purchase completed

Reports

Event Insurance Report ⓘ

Change Year ▾

First Name Last Name Email Phone

Search

Protecht Allianz

REGISTRATION ID	REGISTRANT	EVENT	POLICY	POLICY ID	COVERAGE AMOUNT	POLICY PREMIUM	SHARED W/ RACE	DATE SOLD	PURCHASE COMPLETED	INSURANCE CANCELLED	ADJUSTMENT ID
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Protecht is now our insurance partner, but legacy insurance products through Allianz will still display if it was offered



RaceDay Reports



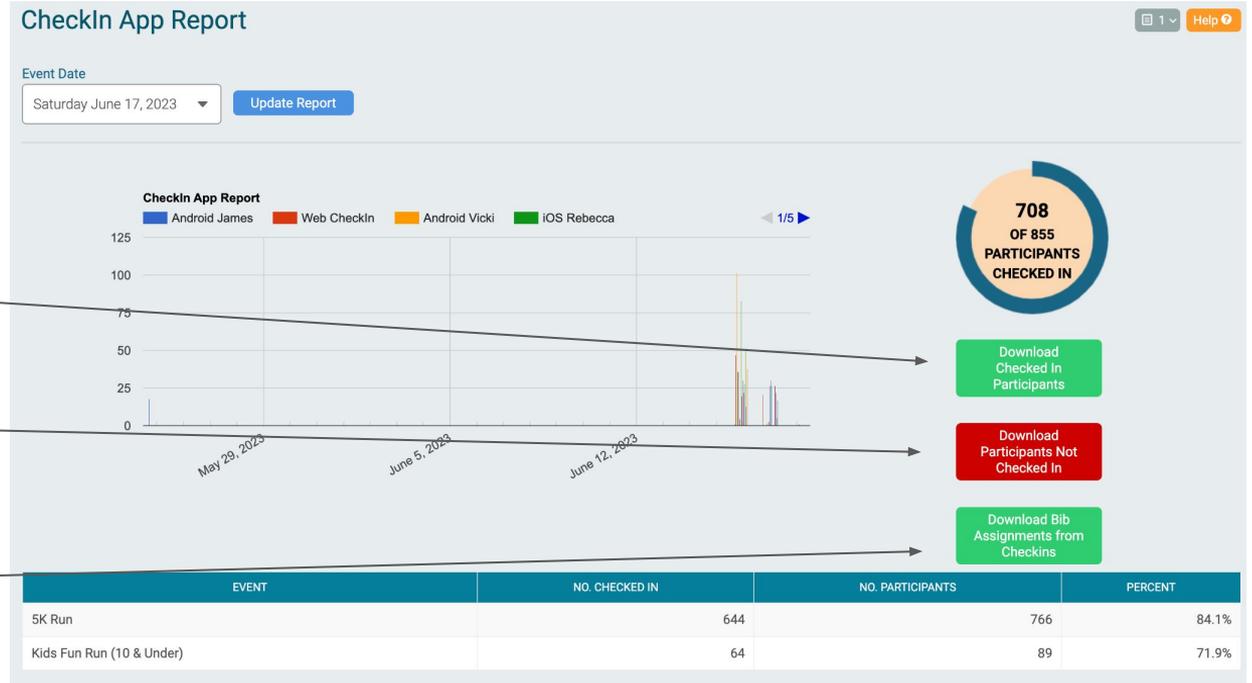
 RunSignup

 TicketSignup

 GiveSignup

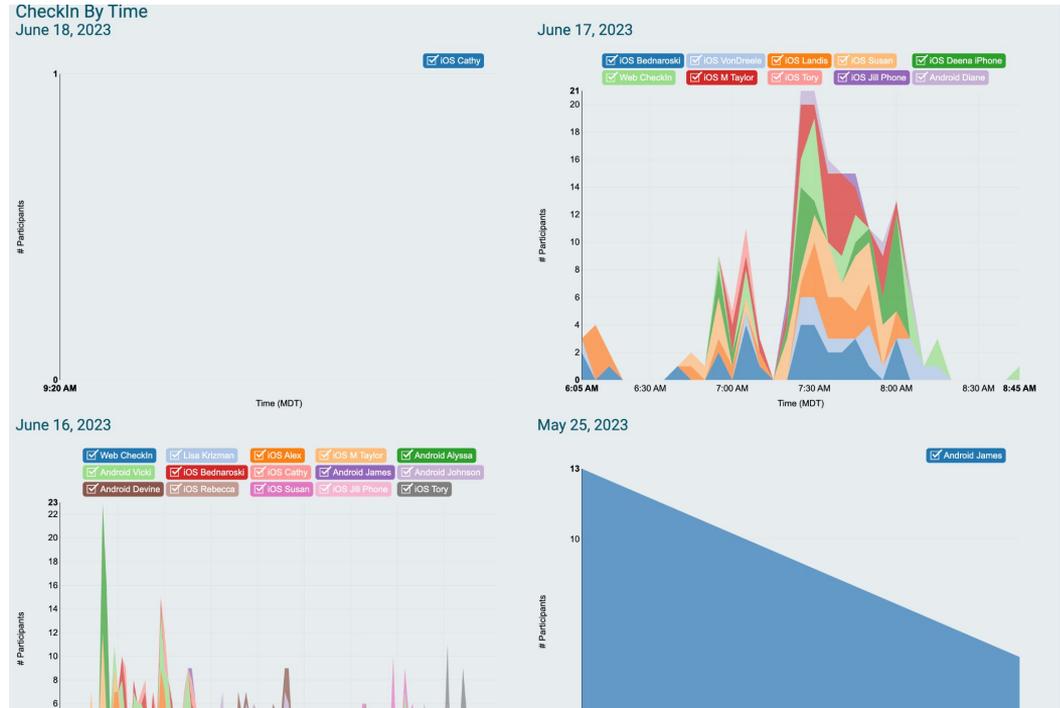
RaceDay CheckIn Stats

- Track how much of your race has checked in
 - Download checked in participants
 - Download not checked in participants
 - Download bib assignments



RaceDay CheckIn Stats

- View device activity by date and time using graphical information
 - Filter by device



RaceJoy Usage

- Track app usage for participants and spectators
- Track website traffic and clicks taken from the RaceJoy app



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Thank You For Joining Us Today

For more information, visit us online at: runsignup.com

