
Participant Management
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RunSignup
UNIVERSITY
2026

Natalie Raborn



Account Manager

Herman Kinard



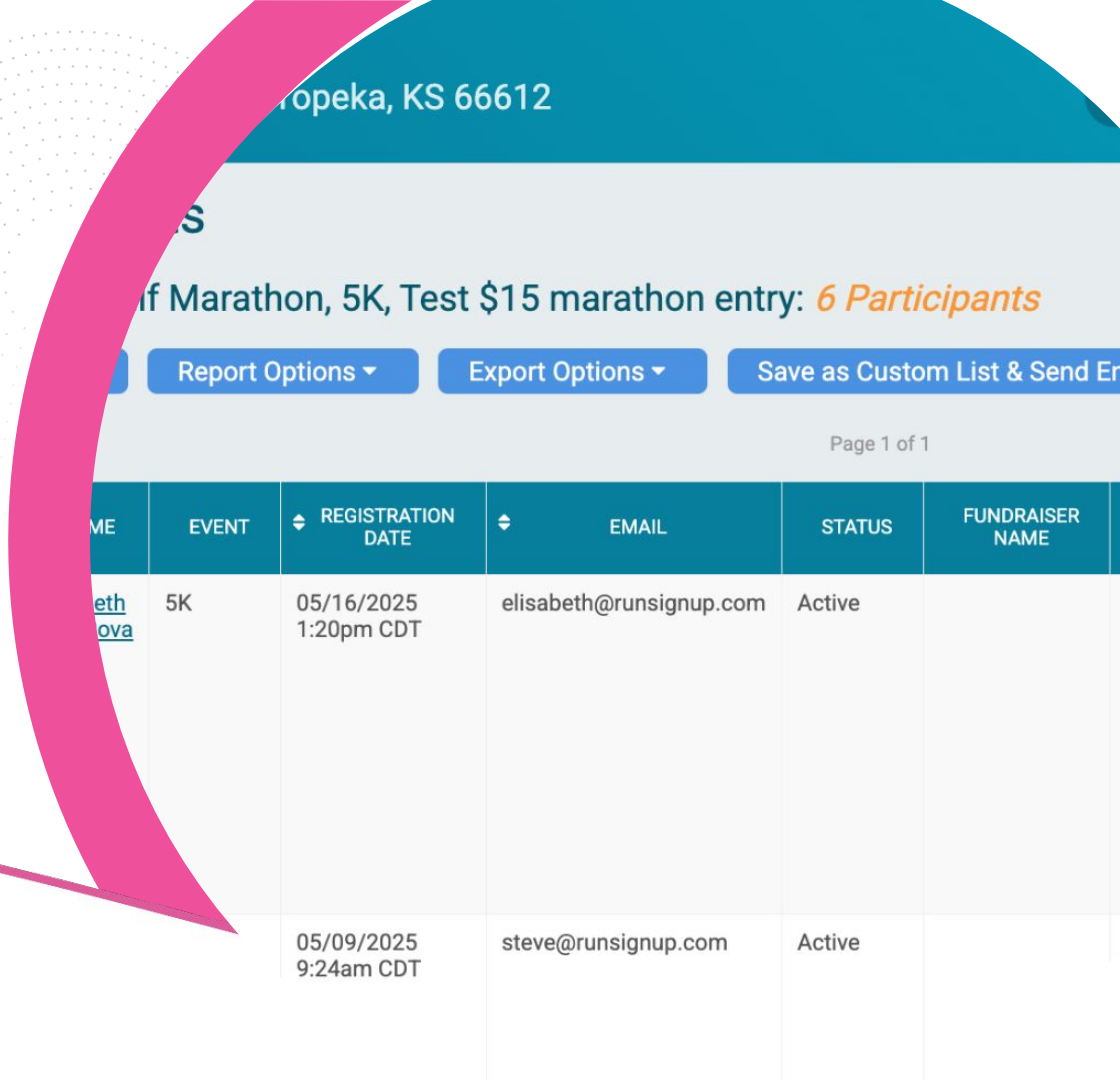
Account Manager

Today’s Agenda:
Backstage Pass to Participant Management

- Goals for Participant Management
- Participant Reports
- Save Time with Self-Serve
- Bulk Participant Management
- Refunds



Participant Report



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View **Participants**

- Primary way to view & manage participants in your race
- Basic Information at top
- Edit Registration
  - Edit participant's information such as giveaway size
- Manage Registration
  - Switch Events
  - Transfer
  - Refunds
  - Remove
  - Add-Ons
  - Custom Questions

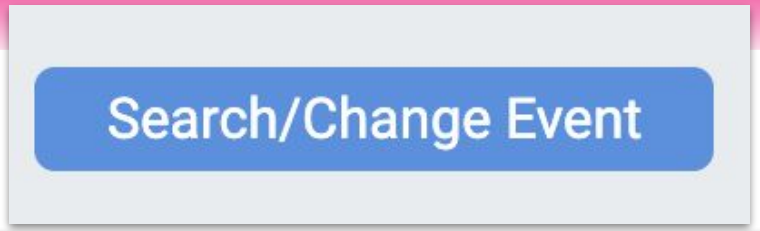


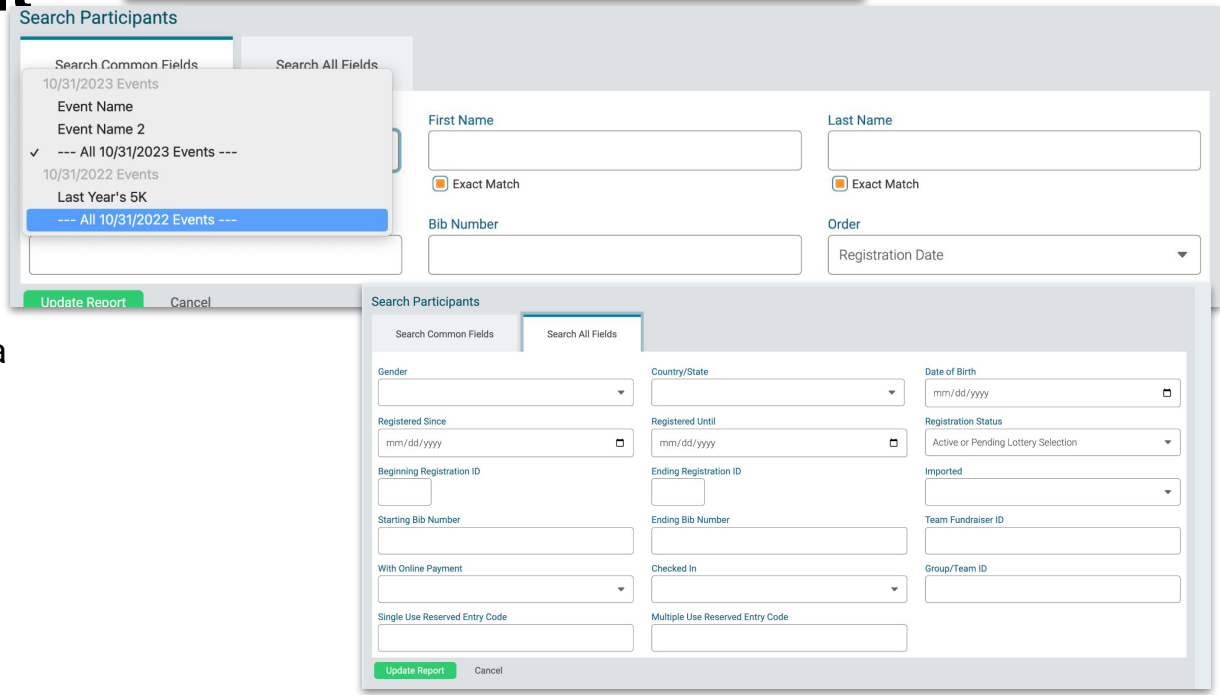
DASHBOARD LOCATION: Participants > **View Participants**

DASHBOARD LOCATION: Reports > Participants > **View Participants**

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 Common Fields** will show a few fields, bib number, etc
- **Search All Fields** can be used for more specific searches.
    - Registration Status

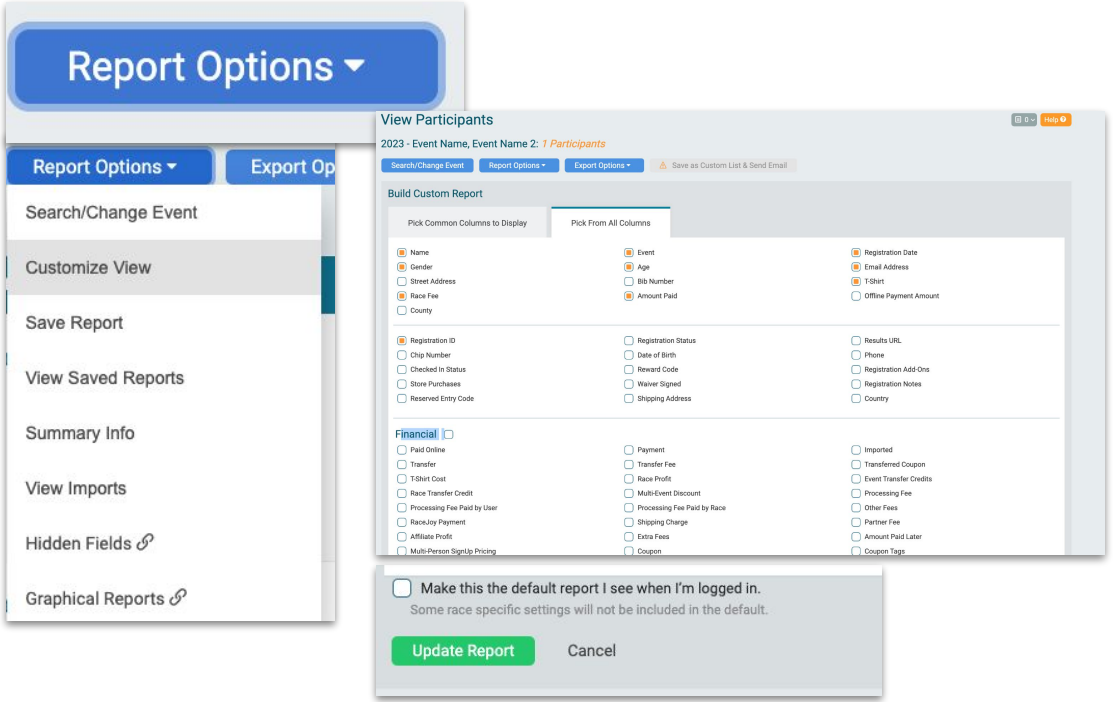




DASHBOARD LOCATION: Participants > View Participants > **Search/Change Events**

View Participants: **Report Options**

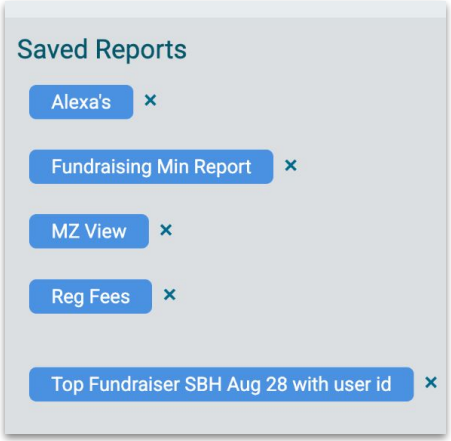
- Customize your participant report by using **Customize View**
  - **Pick From All Columns** will allow you to add fields to your report
  - Save selected columns to always show by default (per user)
- All boxes that are orange will be added to the report when you update

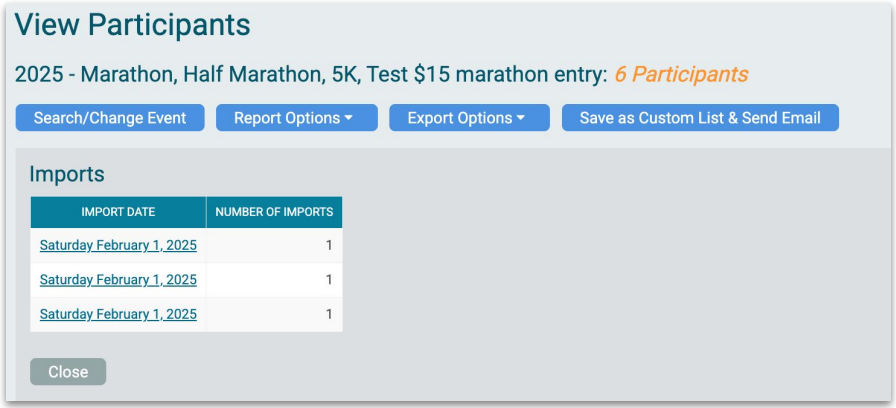


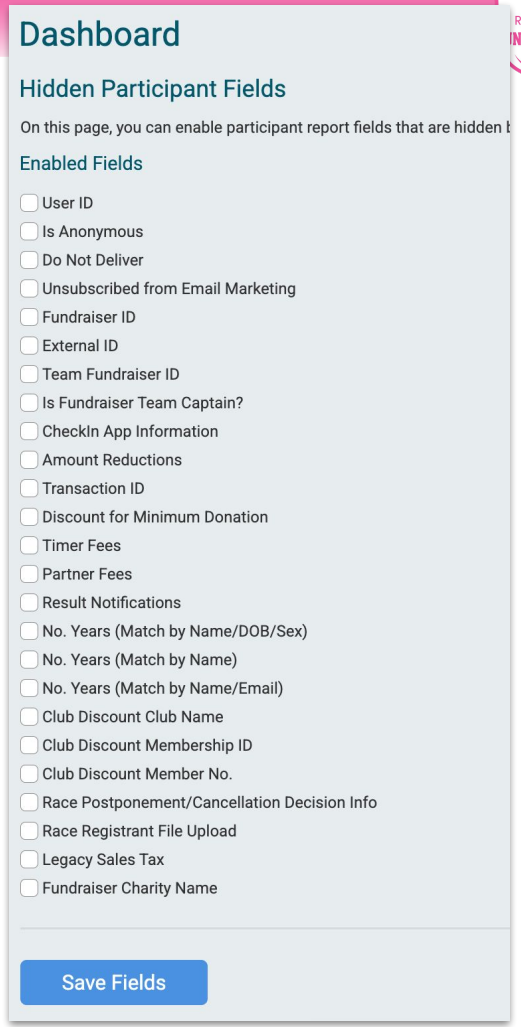
DASHBOARD LOCATION Participants > View Participants > **Report Options/Export Options**

Advanced Features

- Saved reports
- View/delete imports
- Hidden fields
- Save as custom list and send email
- Build bib labels





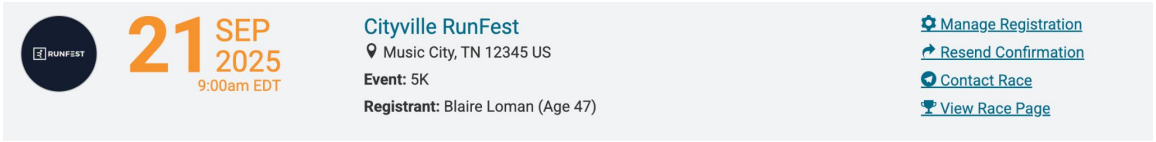


Save Time With Self-Serve



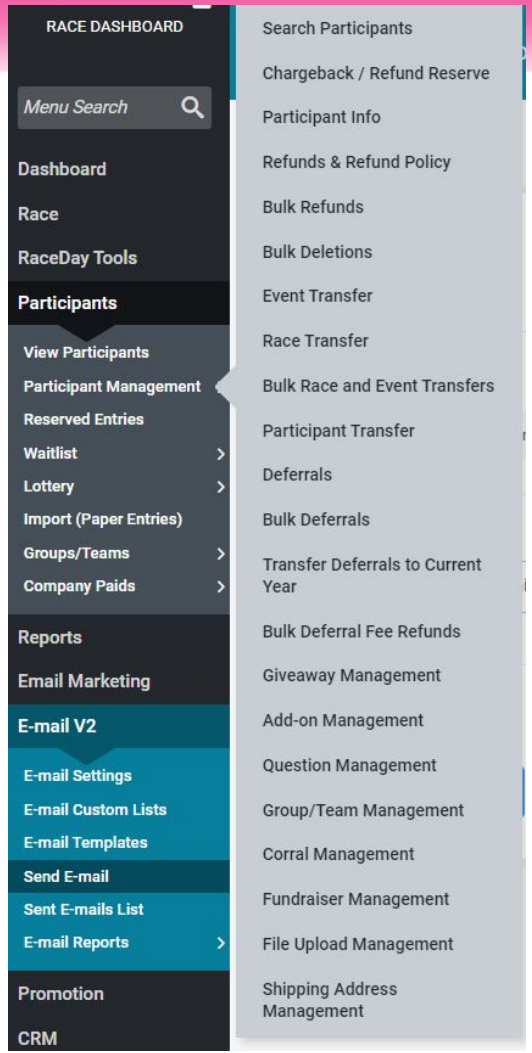
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What Can **Participants Manage**



- Most settings default to off, must enable
- Choose what participants can update and when
- Best practices include Participant Info, Transfers, Giveaways, Add-ons, Questions, Shipping Address, and more!
- Director has full control to make any changes

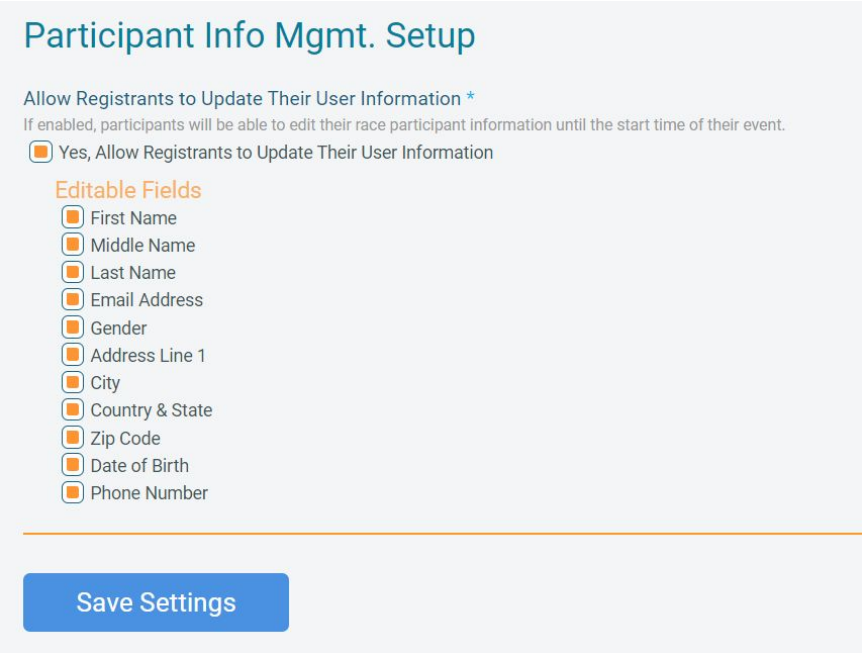
DASHBOARD LOCATION Participants › Participant Management



Self-Serve
Participant Management

Participant Info

Prevent name changes, while still allowing address, email, and/or phone updates.

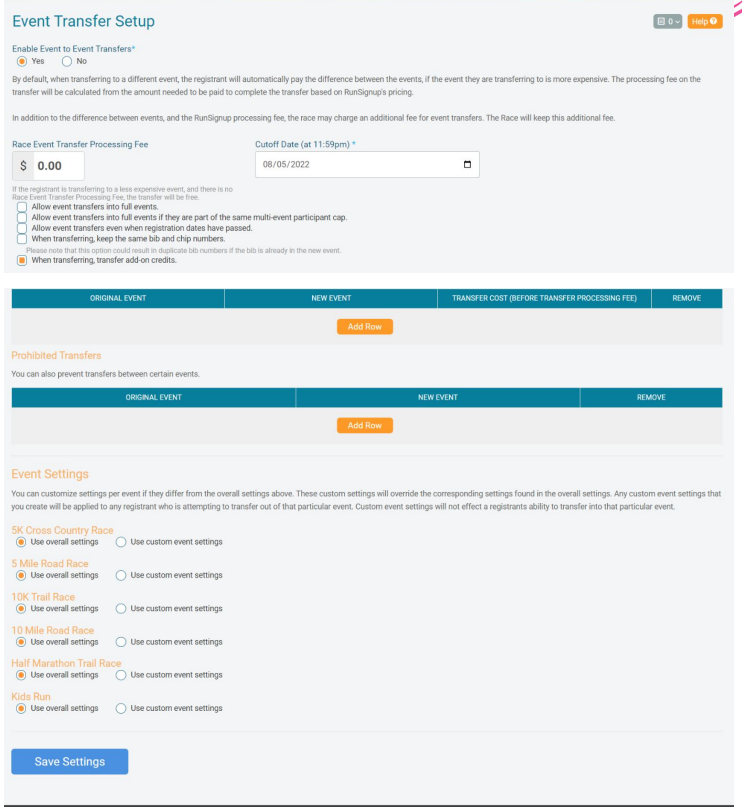


DASHBOARD LOCATION: Participants > Participant Management > Participant Info

Self-Serve
Participant Management

Event Transfers

Allow or prohibit event upgrades or downgrades between specific events. Very detailed options for charging different fees between events or a flat transfer fee



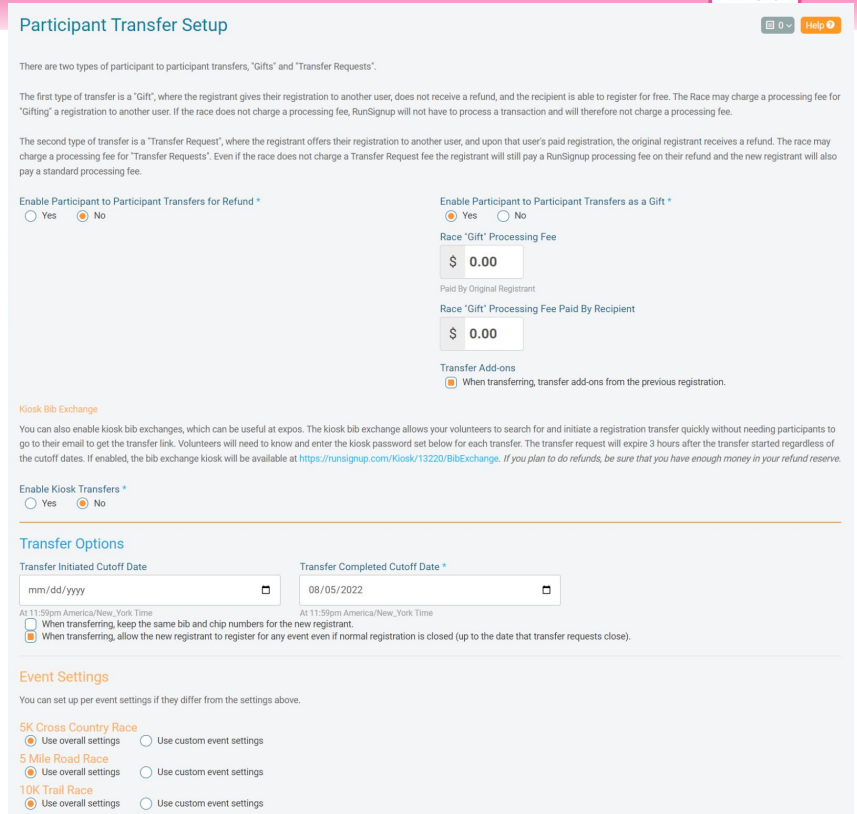
DASHBOARD LOCATION: Participants > Participant Management > Event Transfer

Self-Serve
Participant Management

Participant Transfers

Allow participants to transfer their bib to another person

- Transfer for Refund
- Gift Transfer
- Customizable transfer fees

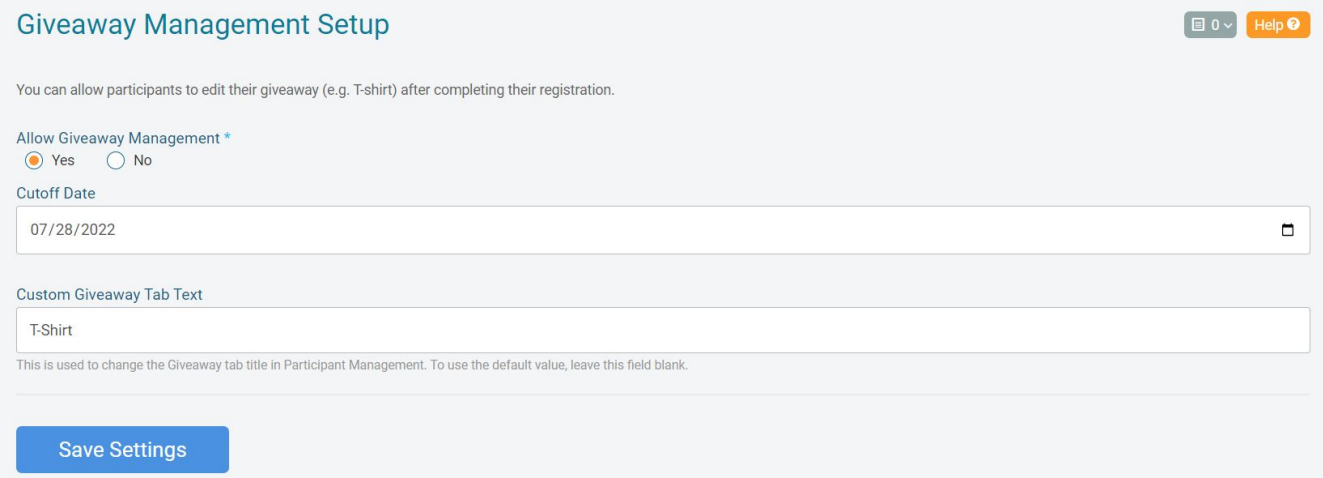


DASHBOARD LOCATION Participants › Participant Management › Participant Transfers

Self-Serve
Participant Management

Giveaway Management

Update giveaway selection

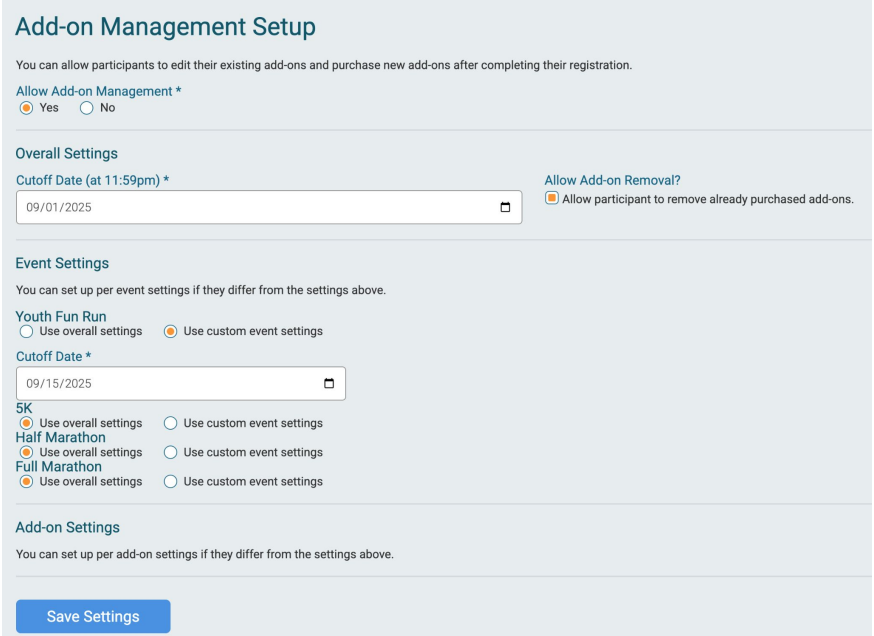


DASHBOARD LOCATION: Participants > Participant Management > Giveaway Management

Self-Serve
Participant Management

Add-On Management

Post registration add-on purchases



DASHBOARD LOCATION Participants > Participant Management > Add-On Management

Self-Serve
Participant Management

Question Management

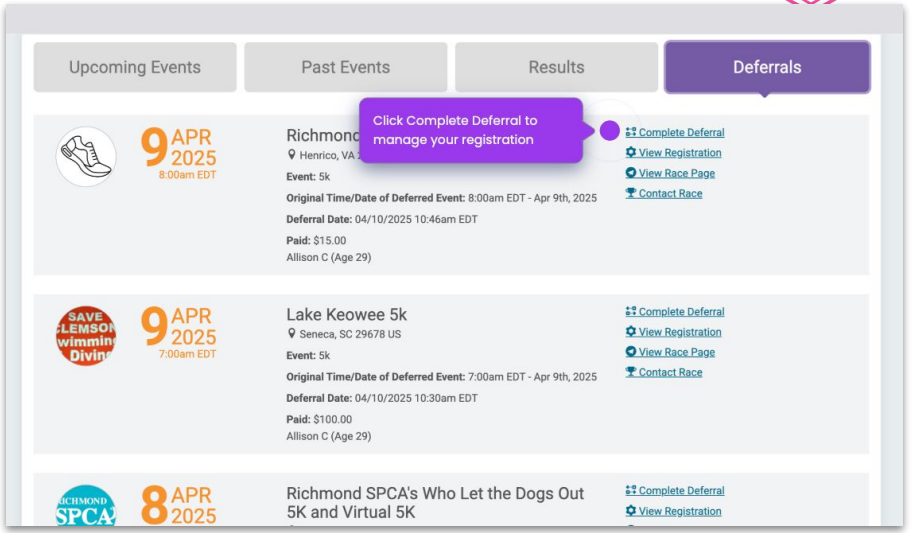
Update custom question answers like emergency contact information.

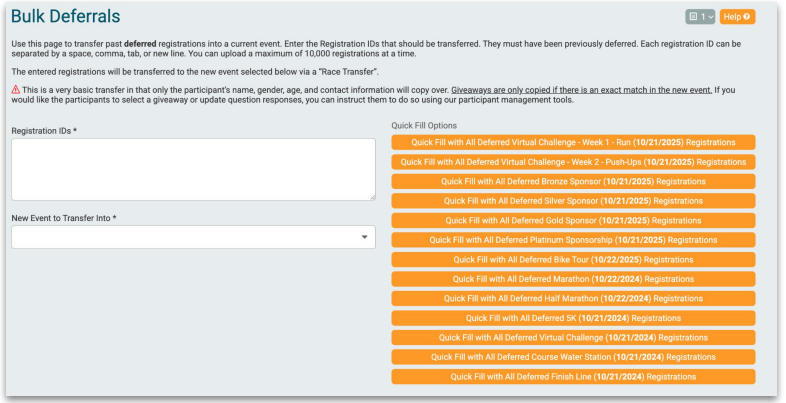


DASHBOARD LOCATION: Participants > Participant Management > Question Management

Deferrals

- Customer service - which is more friendly?
- Capturing true intentions to participate
- Self-serve
  - Via race transfer
  - Via voucher credit
- Admin
  - Transfer deferrals to current year
  - Implications
    - Waivers, update personal information, swag preferences
    - Some data not transferred
- **Recommendation:** Use Deferral via Race Transfer





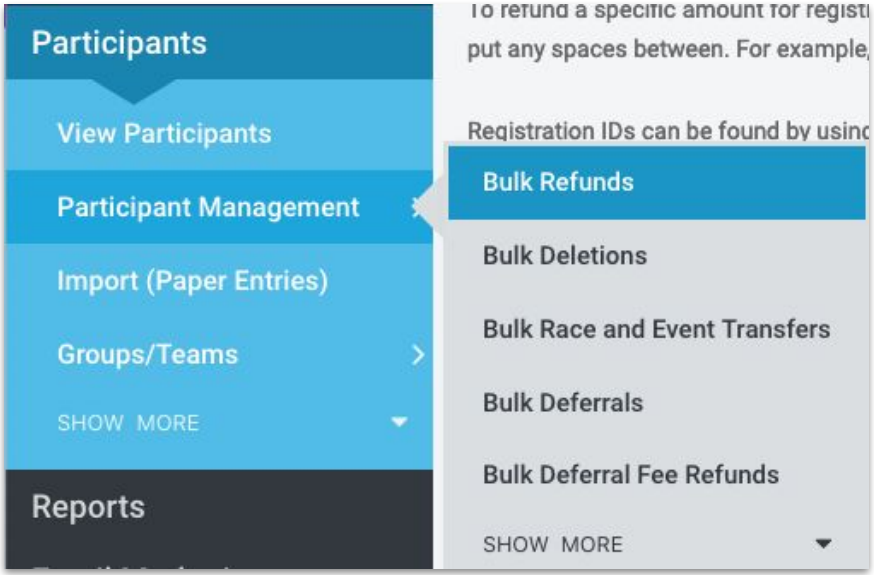
Bulk Participant Management



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Bulk
Participant Management

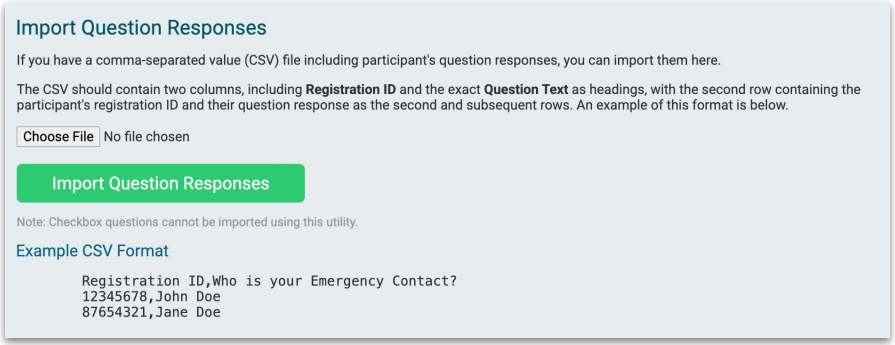
- Bulk Participant Management options to help you clean things up in a more efficient way.
    - Bulk Refunds
    - Bulk Deletions
    - Bulk Race & Event Transfers
    - Bulk Deferrals
    - Bulk Deferral Fee Refunds

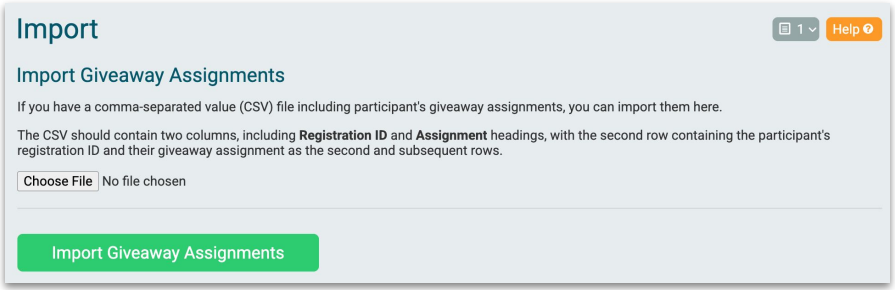


DASHBOARD LOCATION Participants > Participant Management

Bulk Data Updates

- Update custom question responses
  - Participants >> Participant Management >> Question Management
- Update giveaway option responses
  - Race >> Giveaways/Add-ons >> Giveaway, then choose from Actions dropdown





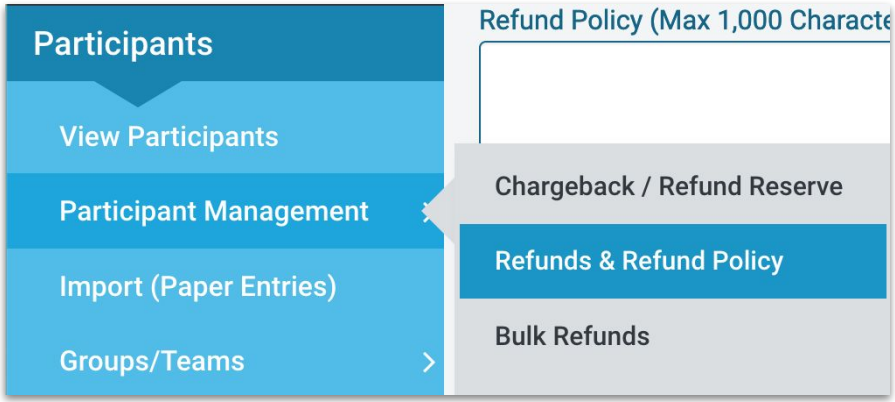
Refunds



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Handling
Refunds

- Refund Reserve must be funded in order to issue refunds
- Bulk Refunds (up to 1,000 at a time)
- Manual Refunds (1-by-1)
- $0 Refund Fee
- Can’t refund regs older than 1 year
- Set up a Refund Policy
  - Display only
  - Checkbox Agreement
  - Initial Agreement

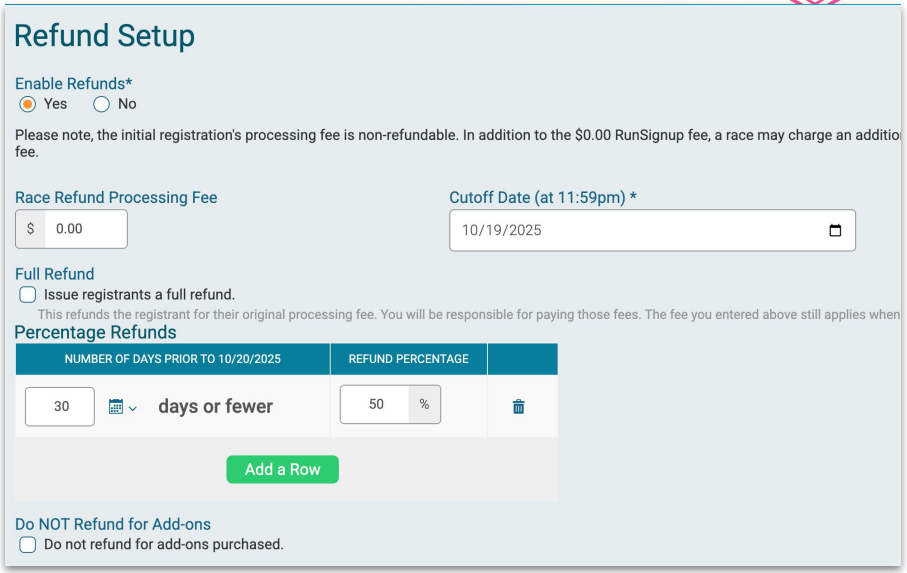


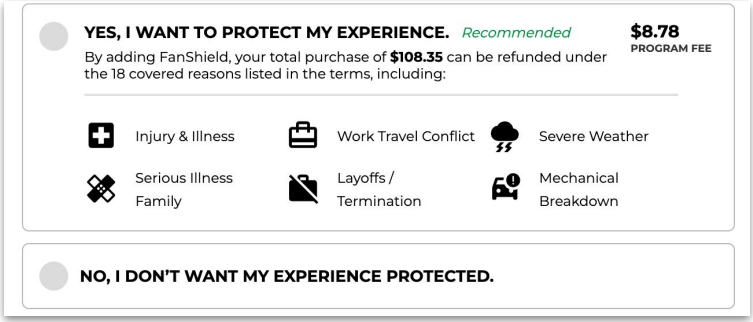
DASHBOARD LOCATION Participants > Participant Management > **Refunds & Refund Policy**

Refunds and Insurance

- Refunds
  - Policy
  - Self-serve or manual
  - Exceptions

- Insurance
  - Conflicts with refunds
    - Are refunds necessary if insurance is offered?
  - Apple Pay prohibits insurance purchases
    - Apple Pay can be disabled






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BLUE 70
VARLO
GUY'S BICYCLES
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Thank You!
Any Questions?
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