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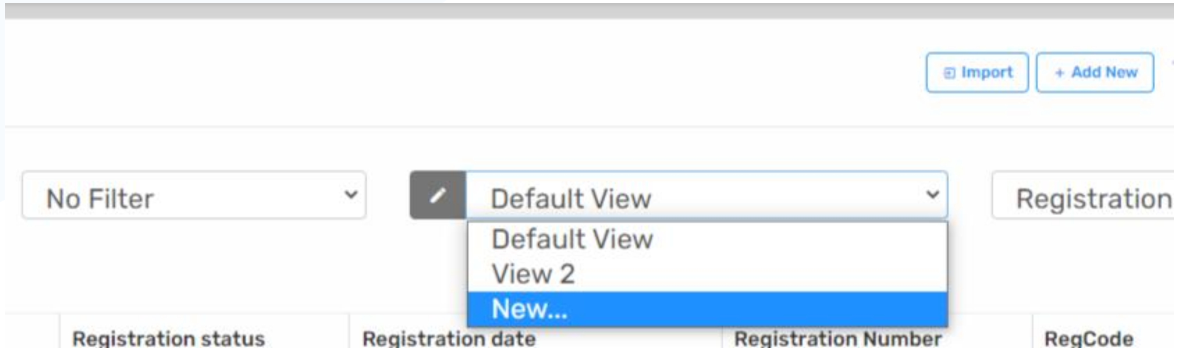
Reports Management

When Going to Registration -> Registrant, you will see a Default Report \ View called "**Default View**"

This is the default **View** \ **Report** that contains columns that the system adds automatically.

STEP 1: Creating a New Report \ View

If you want to create our customized report, click on this arrow near the default view, and then click on new.



Now you can name your report however you want.

then click **Save**, congratulations!!! 👏 you create a new report.

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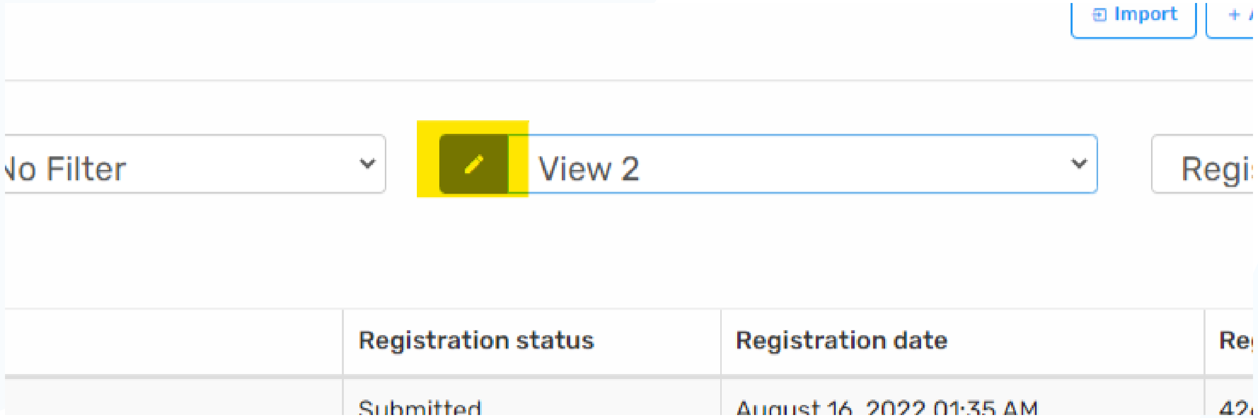
STEP 2: Adding Columns to a Report \ View

Now, if you want to add new columns based on the field that was available in the registration form.

Simply open the drop-down and choose your report, then click on the pencil 🖉 icon.



Here you can change the order of columns, by dragging them up or down.

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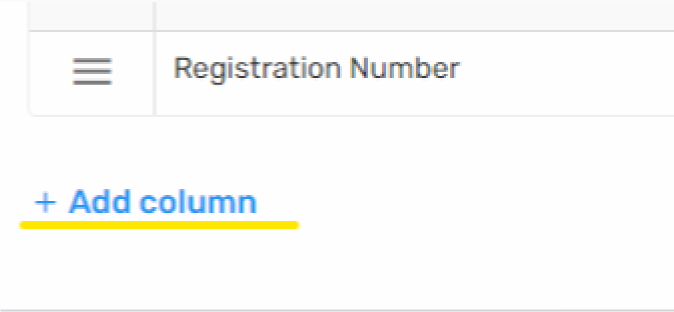
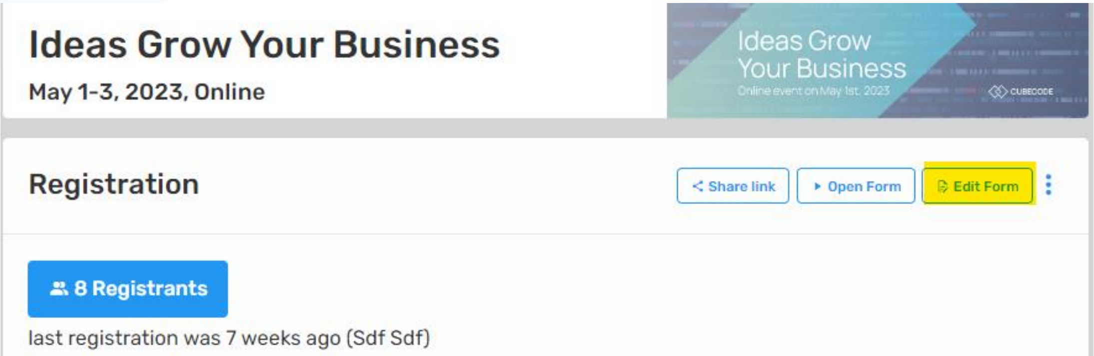
To add a column to your report, click on "**+Add column**", Then search for the name of the field you want to add.



if you don't know or find the Name of the field \ column you want to add, Its because you need its internal name, to find it:

Go to: Registration -> Overview **->** **Edit Form**



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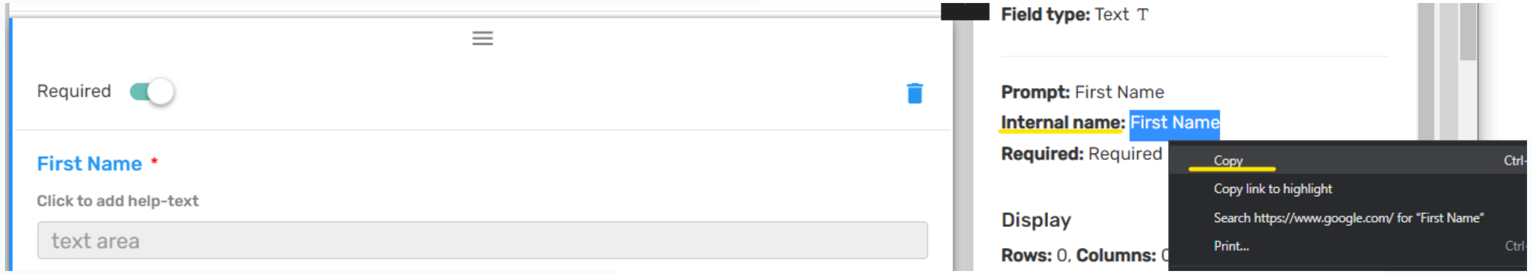
Click on the field that you want to add to the report **->** copy its internal name



Go back to report editing **->** click on "**+Add column**" and past the field internal name **->** and click on the field.

Now the field is added to the report.

don't forget to **Save** at the end.

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Filtering Columns

If you need you can also add filters to reports.

To add a filter, you can select the view you want to add a filter to and click on the pencil 🖉 icon.

We will see a filter icon on the right of every column, by clicking on it, a popup will show up with all the filtering options available for each specific field.

After adding a filter, the filter icon will turn blue , this is the indication that the column has a filter on it.

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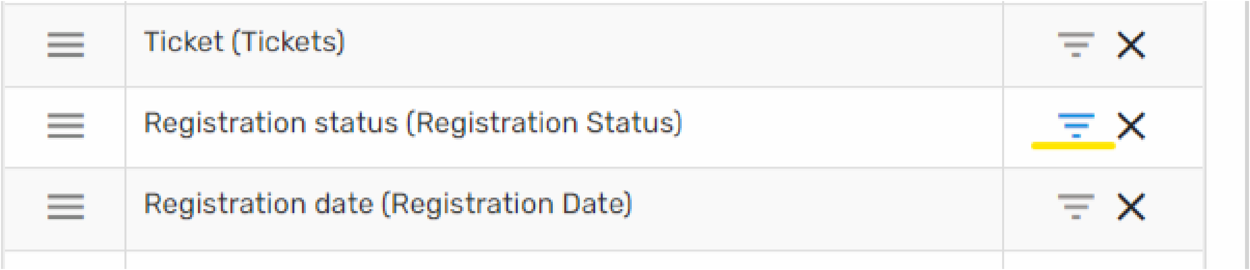

Don't forget to **Save** at the end.

Tip 💡

if for some reason you did not find some of your registrants, don't forget to check your filters.

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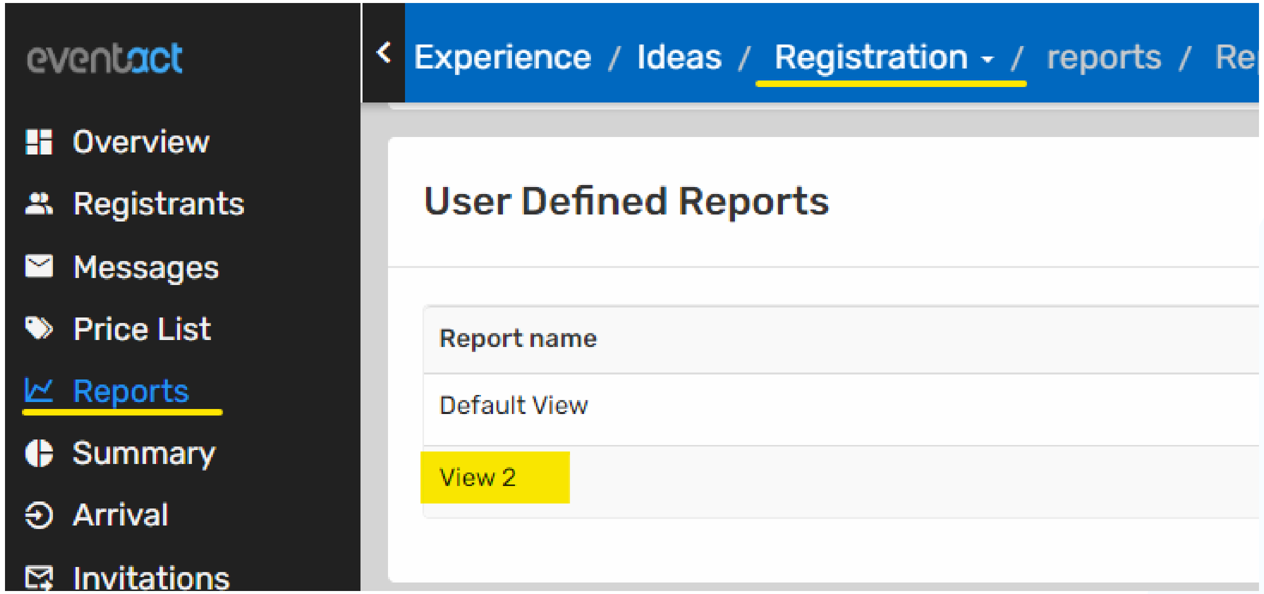
Download a View \ Report

Lastly, if we want to download our report as an excel file, we need to go to reports, click on the name of our report, then **Download**.



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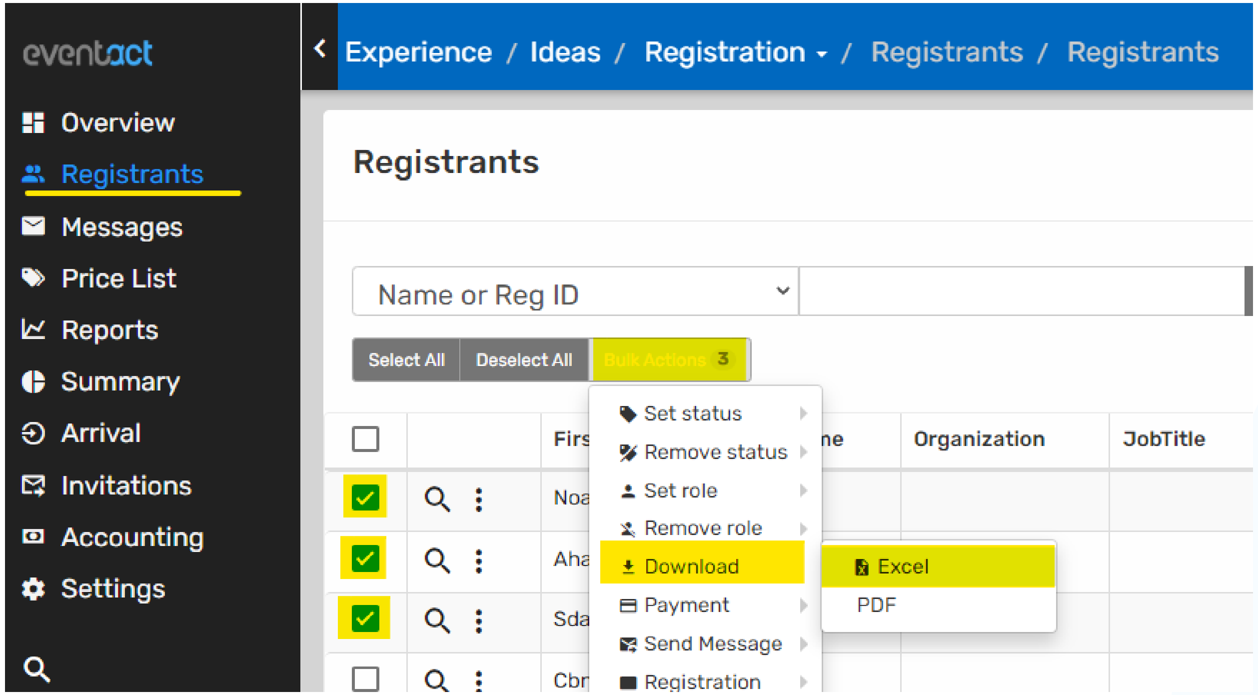
If you need a report that will include only specific registrants simply: select them in the registrant list -> bulk action -> **Download** -> Excel



Note

About reports, The same principles apply to all modules in the system.