

How to Create PayPal Report Showing How Many Registered for a Class

Pre-note 1: PayPal is not set up for class registrations so you need to work within their system, which isn't always logical.

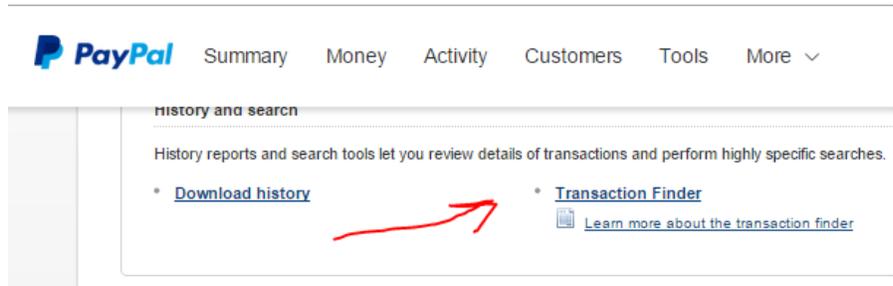
Pre-note 2: The PayPal Button for class registration must be/have been set up properly. (*Only continue reading if you set up PP buttons*) That is, give each class a unique class # that includes the class date in this format MMDDYY. If there is more than 1 class on the same day, add a letter at the end to distinguish them, for example, 101715a and 101715b. Then turn on optional "Inventory Tracking" and give each payment option (registering for 1 person \$35, 2 people \$70, etc.) a separate sequenced tracking # based on the date part of the class #. Any questions on this - see Nancy Cornett.

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Once logged in to PayPal select REPORTS (usually under the MORE menu at the top of screen)

Scroll down and select **Transaction Finder**

(There's a handy little "Learn more about the transaction finder button" you can click that may help if you get stuck.)



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A screen will pop up on which you'll need to enter criteria for PayPal to use for the search. In this sample we'll search for Chris Sheldon's class which is held on Oct. 17, 2015.

Note when it says the report is updated. It may not include the most recent entries, so compare report with transactions or emails.



KEYWORD: All classes should now be given a # that includes the class date in this format (plus other things) MMDDYY, so it will be safe to use that as a keyword. If there is more than 1 class on the same day we will add a letter at the end to distinguish them, for example, 101715a and 101715b.

quickly find a transaction or set of transactions. Narrow your search by entering a

A screenshot of the 'Report search criteria' form. It has a dropdown menu for 'Report search criteria' which is currently expanded. Below it are three input fields: 'Search keyword(s)' with the value '101715', 'Date range' with '8/17/2015' and '9/27/2015', and 'Transaction type' with a dropdown menu set to 'All'. There is a 'Filter your results' link and a 'Search' button at the bottom.

PayPal organizes by date range so you have to choose a range that includes all possible registrations. First date on or before the date the registration page went live, end date = today.

Leave Transaction type as ALL.

Click on the SEARCH button - wheeeeeeeee. Up pops your report.

Search Transaction Result Notes

From the on-screen report you see how much was paid. From the total you divide by the cost of the class to figure how many registered ($560/35 = 17$). You only see who paid and for how many, not who will actually be attending.

If there is more than 1 page, use arrow keys to see more pages

You may download this report and have your choice of several different formats by clicking on this box. All include JUST the information shown here except CSV. If you choose CSV it also includes many more columns such as email and home address. CSV files will open in Excel or a number of other programs


 Print

Search Transactions Results

Date	Type	Name	Subject	Gross Amount	Fees	Net Amount
9/20/2015	Website Payment		ry	<u>35.00 USD</u>	-1.32	33.68
9/20/2015	Website Payment		se	<u>35.00 USD</u>	-1.32	33.68
9/20/2015	Website Payment	Kay	ell	<u>35.00 USD</u>	-1.32	33.68
9/22/2015	Website Payment	Mik	as	<u>35.00 USD</u>	-1.32	33.68
9/22/2015	Website Payment	G	lia	<u>70.00 USD</u>	-2.33	67.67
9/24/2015	Website Payment	P	er	<u>35.00 USD</u>	-1.32	33.68
9/24/2015	Website Payment		ert	<u>70.00 USD</u>	-2.33	67.67
9/26/2015	Website Payment		py	<u>35.00 USD</u>	-1.32	33.68
9/26/2015	Website Payment		ry	<u>35.00 USD</u>	-1.32	33.68
9/26/2015	Website Payment		ert	<u>35.00 USD</u>	-1.32	33.68
9/26/2015	Website Payment		an	<u>35.00 USD</u>	-1.32	33.68
9/27/2015	Website Payment		an	<u>105.00 USD</u>	-3.35	101.65
Total				560.00 USD	-19.89	540.11

Data is current as of September 26, 2015 13:07 PDT