

EVENT CHECK PAYMENTS DUE

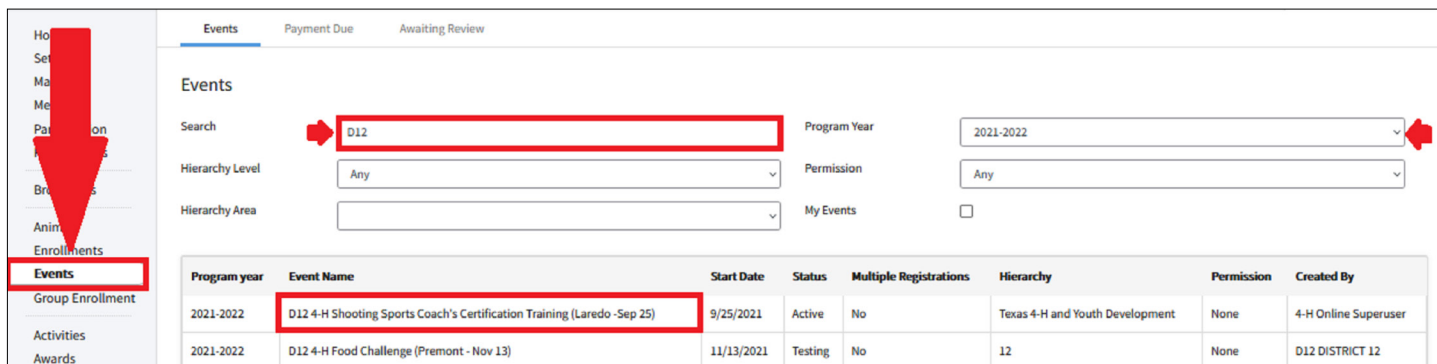
View a few 4HOnline screens to see what checks are due from the county manager's login!

Payments Without Invoice	This is a county check payment designated by the member and approved at the final level. The 3-step invoice process needs to be completed by the county office to send in payment. The payment method is not reversible.
Invoice Not Created	A payment was applied to the member's record but an invoice has not been created to send with the county/club 4-H check.
Invoice Without Received Payments	A payment invoice was created but the payment was not received at the State 4-H Office.

BUILD A CUSTOM REPORT FOR EVENT STATUSES

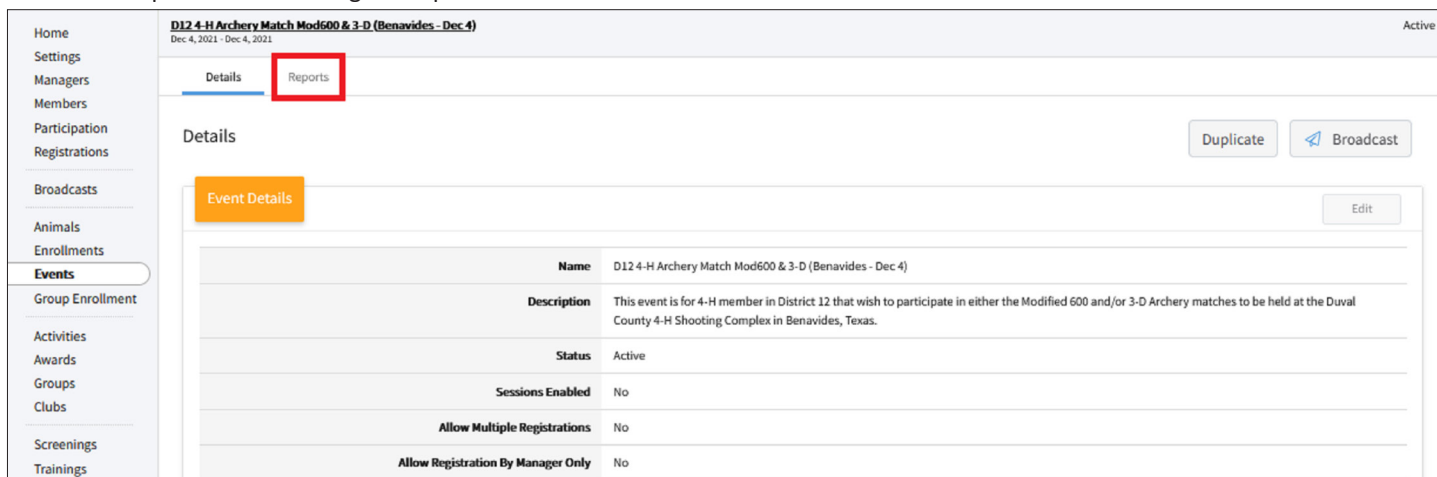
FIND THE EVENT

- Click the Events link in the navigation pane on the left side of the screen.
- From the Program year drop down menu, select the 4-H year that the event took place in or leave as default if unknown and adjust when necessary.
- Use the filters to search for the event. Tip: Type in one keyword in the search box - the screen will auto populate.
- Click the name of the event from the Events list that is displayed at the bottom.



Program year	Event Name	Start Date	Status	Multiple Registrations	Hierarchy	Permission	Created By
2021-2022	D12 4-H Shooting Sports Coach's Certification Training (Laredo - Sep 25)	9/25/2021	Active	No	Texas 4-H and Youth Development	None	4-H Online Superuser
2021-2022	D12 4-H Food Challenge (Premont - Nov 13)	11/13/2021	Testing	No	12	None	D12 DISTRICT 12

- Click the Reports sub-tab along the top of the screen.

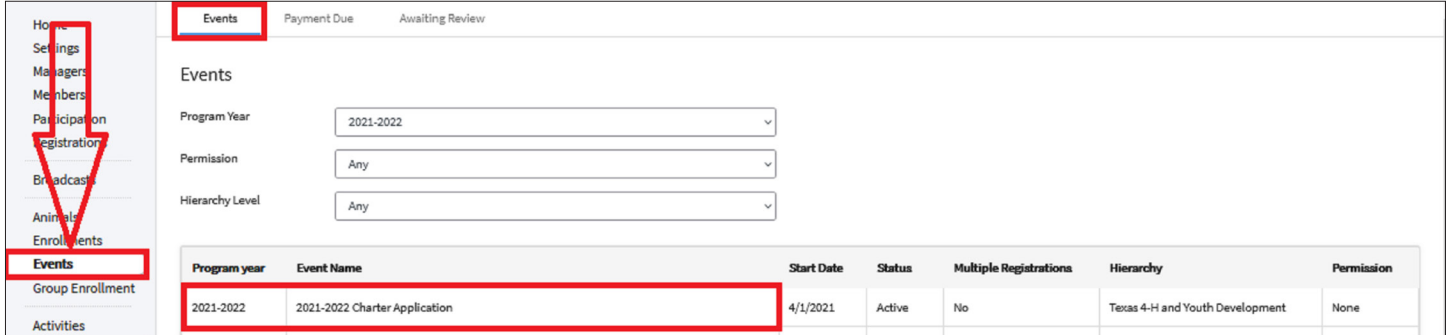


Name	Description	Status	Sessions Enabled	Allow Multiple Registrations	Allow Registration By Manager Only
D12 4-H Archery Match Mod600 & 3-D (Benavides - Dec 4)	This event is for 4-H member in District 12 that wish to participate in either the Modified 600 and/or 3-D Archery matches to be held at the Duval County 4-H Shooting Complex in Benavides, Texas.	Active	No	No	No

CREATE CUSTOM REPORT

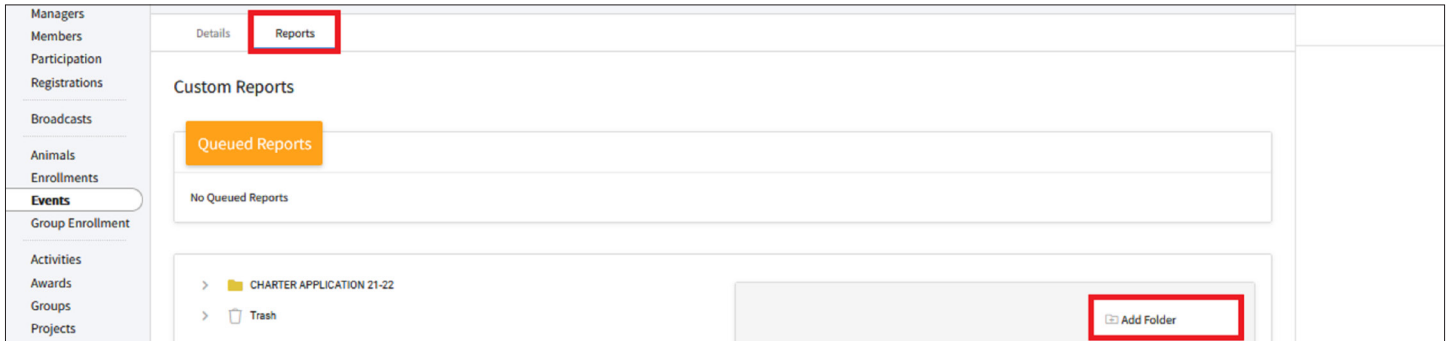
CREATE A FOLDER

- Click the Events link in the navigation pane on the left side of the screen.
- Click the name of the event from the Events list.

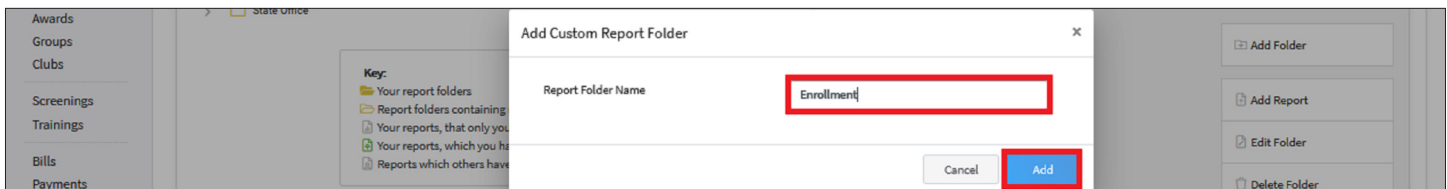


Program year	Event Name	Start Date	Status	Multiple Registrations	Hierarchy	Permission
2021-2022	2021-2022 Charter Application	4/1/2021	Active	No	Texas 4-H and Youth Development	None

- Click the Reports sub-tab along the top of the screen.
- Click the Add Folder button.

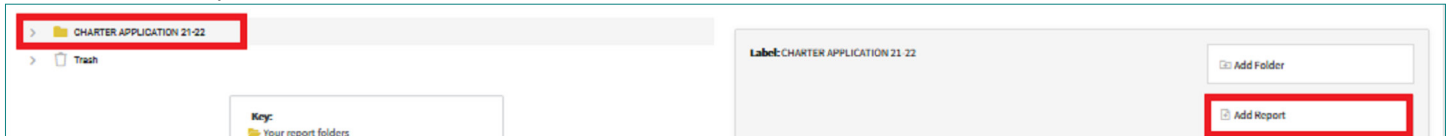


- Type in the name of your new folder. A folder is required before a report can be created.
- Click the blue Add button.

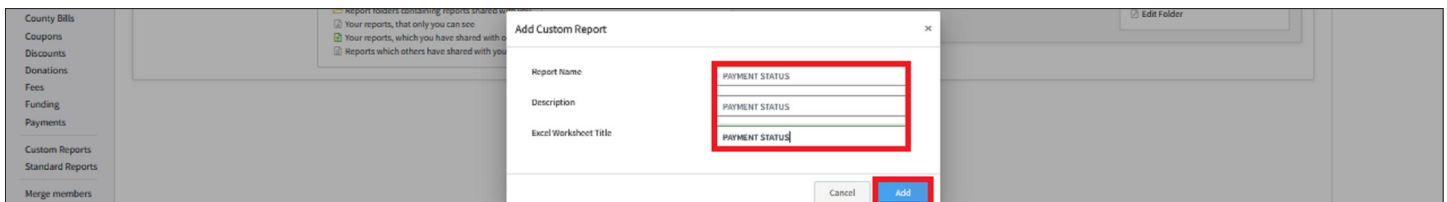


CREATE A REPORT

- Click the name of the folder to put the report into.
- Click the Add Report button.



- Enter the Report Name that will be displayed on the custom report list screen in the Report Explorer section.
- Enter a description of the report to help you remember what the report was created for.
- Enter the Excel Worksheet Title. This will be the name of the file that is downloaded from the system.
- Click the blue Add button.



REPORT COLUMNS

- Click the Edit button under the Report Columns area.

For a quick basic search of status move over the following columns: Registration: Event Name, Member: County Name, Member: Family Email, Member: Name-Last, First, Registration: Registration State, , Payment: Payment Status, Payment: Payment Amount, Payment: Payment Method Type

NOTE: The more columns used might cause a person to be added to the report multiple times based on the Field brought over. Example: A person could have had a declined credit card and approved credit card. Payment fields will cause a person to be on the report multiple times.

VIEWING REPORT IN EXCEL

- Click the Download Excel button. The file will download to your computer/device or ask for a save file location.

- Open the file to view the status. You will need to filter your report in the following order:
 - Registration State will give the absolute status. Filter OUT the Resubmit, Incomplete, Approved, Declined and Canceled statuses.
 - The payment status column will give the payment status. Filter OUT the Paid and Canceled statuses.

County Name	First Name	Last Name	Registration State	What it means?
Anderson			Approved	PAID
Anderson			Approved	PAID
Anderson			Approved	PAID
Robertson			Awaiting Review - County	NOT PAID
Robertson			Awaiting Review - County	NOT PAID
Robertson			Awaiting Review - County	NOT PAID
Robertson			Awaiting Review - County	NOT PAID
Robertson			Awaiting Review - County	NOT PAID
Williamson			Incomplete	NOT PAID
Williamson			Incomplete	NOT PAID
Lampasas			OutstandingInvoice	INVOICE STEP 1&2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Williamson			OutstandingInvoice	INVOICE STEP 1&2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Bell			PaymentNotReceivedByInstitution	INVOICE STEP 2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Bell			PaymentNotReceivedByInstitution	INVOICE STEP 2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Bell			PaymentNotReceivedByInstitution	INVOICE STEP 2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Tarrant			PaymentNotReceivedByInstitution	INVOICE STEP 2 NOT COMPLETED AND STATE HAS NOT RECEIVED
Lampasas			Resubmit	NOT PAID

LOOK AT THE REGISTRATION STATE AND PAYMENT STATUS FOR ACCURATE REPORTING

The members of Texas A&M AgriLife will provide equal opportunities in programs and activities, education, and employment to all persons regardless of race, color, sex, religion, national origin, age, disability, genetic information, veteran status, sexual orientation or gender identity and will strive to achieve full and equal employment opportunity throughout Texas A&M AgriLife.