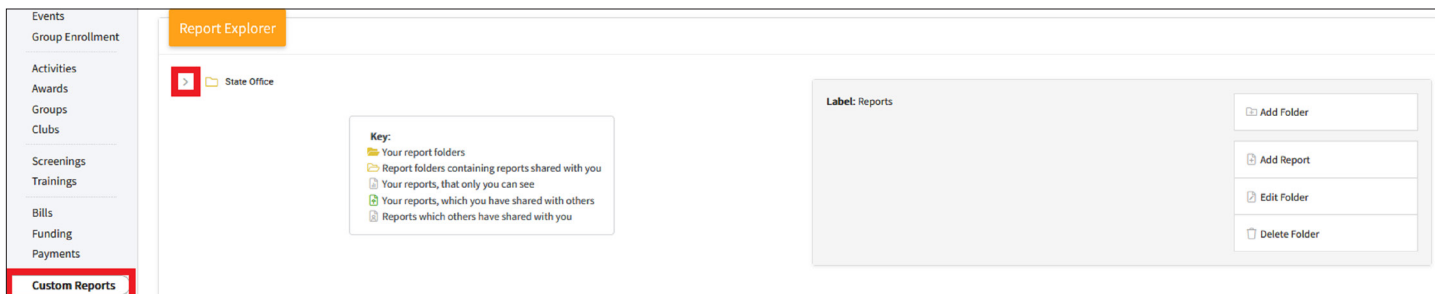


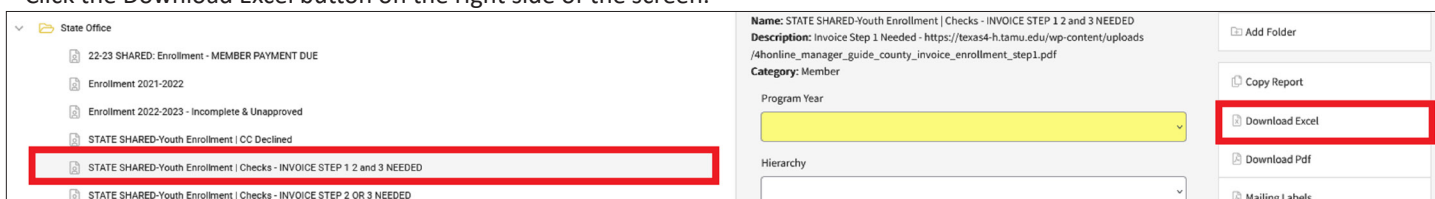
## DOWNLOAD SHARED CUSTOM REPORT

- Click the Custom Reports link in the navigational pane on the left side of the screen.
- Click the right arrow beside the State Office folder to open it if it's not already opened.



The screenshot shows the 'Report Explorer' interface. On the left, a sidebar contains a list of navigation items: Events, Group Enrollment, Activities, Awards, Groups, Clubs, Screenings, Trainings, Bills, Funding, Payments, and Custom Reports (highlighted with a red box). The main area shows a tree view with 'State Office' expanded, revealing a list of reports. A 'Key' box explains report types: 'Your report folders', 'Report folders containing reports shared with you', 'Your reports, that only you can see', 'Your reports, which you have shared with others', and 'Reports which others have shared with you'. On the right, a 'Label: Reports' section contains buttons for 'Add Folder', 'Add Report', 'Edit Folder', and 'Delete Folder'.

- Click on the report called STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1-5 NEEDED. (Volunteer report available too)
- Click the Download Excel button on the right side of the screen.



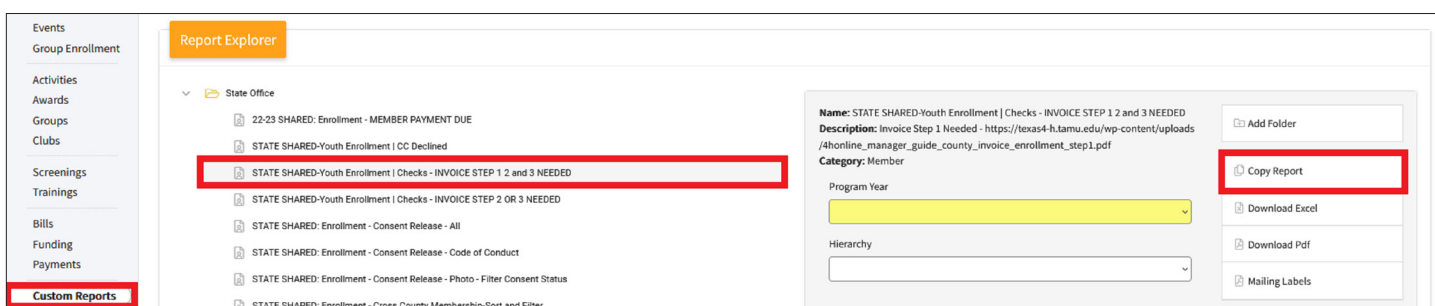
The screenshot shows the details for the report 'STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1 2 and 3 NEEDED'. The left sidebar shows the report selected in the 'State Office' folder. The main area displays the report's name, description, and category. On the right, a list of actions includes 'Add Folder', 'Copy Report', 'Download Excel' (highlighted with a red box), 'Download Pdf', and 'Mailing Labels'.

- The members listed chose a check payment method and was approved by the county office. These payments are locked in. The county needs to follow the invoicing instructions steps 1 - 5 and send in a county or club check. [Download Instructions Here](#)

Enrollment District	Enrollment County	Member Id	Family Email	Name: Last, First	Enrollment Role	Member Participation Status	Enrollment Date Created
08	Eastland				Club Member	Payment Due	10/19/2022
08	Eastland				Club Member	Payment Due	09/26/2022
08	Eastland				Club Member	Payment Due	09/26/2022
08	Eastland				Club Member	Payment Due	09/10/2022
08	Eastland				Club Member	Payment Due	09/10/2022

## COPY AND EDIT SHARED CUSTOM REPORT

- Click the Custom Reports link in the navigational pane on the left side of the screen.
- Click the right arrow beside the State Office folder.
- Click on the report called STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1-5 NEEDED.
- Click the Copy Report button on the right side of the screen.



The screenshot shows the 'Report Explorer' interface with the report 'STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1 2 and 3 NEEDED' selected in the 'State Office' folder. The left sidebar shows the 'Custom Reports' link highlighted. The main area displays the report's details. On the right, the 'Copy Report' button is highlighted with a red box.

- After the screen refreshes there will be a folder with the copied report listed in it. (click to refresh if needed)
- Click the report called STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1-5 NEEDED in the SHARED REPORTS folder.
- Click the Edit Report button on the right side of the screen to enter the report to make changes.



The screenshot shows the 'SHARED REPORTS' folder. The report 'STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1 2 and 3 NEEDED (Copy)' is selected. The left sidebar shows the 'SHARED REPORTS' folder expanded. The main area displays the report's details. On the right, the 'Edit Report' button is highlighted with a red box.

**ANY EXTRA 4HONLINE REPORT COLUMNS ADDED TO THE REPORT COULD DISPLAY INCORRECT DATA OR DUPLICATE ROWS**

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.

## CUSTOM REPORT DETAILS

Report Columns

Edit

Participation	Enrollment District
Participation	Enrollment County
Member	Member Id
Member	Family Email
Member	Name: Last, First
Participation	Enrollment Role
Participation	Member Participation Status
Participation	Enrollment Date Created

Custom Filters

Edit

Member Program Year Status is equal to Requirements Not Met

AND

Payment Method Type is null

AND

Paid Amount is equal to 0.00

AND

Invoice Status is equal to Paid

Standard Filters

Edit

Include All Years	No
Enrollment Roles	Club Member
Participation Statuses	
Enrollment Start Date	
Enrollment End Date	
Member Flagged	No
4-H Age	
School Grade	
Family Counties	
Enrollment Counties	
Clubs	
Projects	

Column Sorting

Edit

Enrollment District	Ascending
Enrollment County	Ascending
Name: Last, First	Ascending