

TEXAS 4HONLINE COUNTY MANAGER GUIDE ENROLLMENT PAYMENTS SHARED CUSTOM REPORT CHECK PAYMENT DUE - INVOICE STEPS 1-5



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.

Events Group Enrollment	Report Explorer		
Activities Awards	2 🗅 State Office		
Groups Clubs	Key:	Label: Reports	C Add Folder
Screenings	Sur report folders in the contract of the cont		Add Report
Trainings Bills	 Your reports, that only you can see Your reports, which you have shared with others Reports which others have shared with you 		2 Edit Folder
Funding Payments			🗍 Delete Folder
Custom Reports			

Click on the report called STATE SHARED-Youth Enrollment | Checks - INVOICE STEP 1 2 and 3 NEEDED. Click the Download Excel button on the right side of the screen

· Click the Download Excel batton on the right side of the screen.				
V 🗁 State Office	Name: STATE SHARED-Youth Enrollment Checks - INVOICE STEP 1 2 and 3 NEEDED Description: Invoice Step 1 Needed - https://texas4-h.tamu.edu/wp-content/uploads	E Add Folder		
22-23 SHARED: Enrollment - MEMBER PAYMENT DUE	/4honline_manager_guide_county_invoice_enrollment_step1.pdf			
Enrollment 2021-2022	Category: Member	💭 Copy Report		
Enrollment 2022-2023 - Incomplete & Unapproved	Program Year	Download Excel		
STATE SHARED-Youth Enrollment CC Declined	, view of the second se			
STATE SHARED-Youth Enrolment Checks - INVOICE STEP 1 2 and 3 NEEDED	Hierarchy	Download Pdf		
STATE SHARED-Youth Enrollment Checks - INVOICE STEP 2 OR 3 NEEDED	v	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. <u>Download Instructions Here</u>

Enrollment District	- Enrollment County 💌	Member Id 💌 Family Email	💌 Name: Last, First 💌	Enrollment Role 💌	Member Participation Status	🛛 Enrollment Date Created 💌
08	Eastland	termination and the second sec		Club Member	Payment Due	10/19/2022
08	Eastland	the second se		Club Member	Payment Due	09/26/2022
08	Eastland			Club Member	Payment Due	09/26/2022
08	Eastland	Second Second Second Second Second		Club Member	Payment Due	09/10/2022
08	Eastland	the second s	States - States	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.

Events Group Enrollment	Report Explorer		
Activities Awards Groups Clubs		Name: STATE SHARED-Youth Enrollment Checks - INVOICE STEP 1 2 and 3 NEEDED Description: Invoice Step 1 Needed - https://texas4-h.tamu.edu/wp-content/uploads /Aboniine_manager_guide_county_invoice_enrollment_step1.pdf	Add Folder
Screenings	STATE SHARED-Youth Enrollment Checks - INVOICE STEP 1 2 and 3 NEEDED	Category: Member Program Year	Copy Report
Trainings Bills	STATE SHARED-Youth Enrollment Checks - INVOICE STEP 2 OR 3 NEEDED	v logialiti tear	Download Excel
Funding	STATE SHARED: Errollment - Consent Release - All STATE SHARED: Errollment - Consent Release - Code of Conduct	Hierarchy	Download Pdf
Payments Custom Reports	STATE SHARED: Enrollment - Consent Release - Photo - Filter Consent Status STATE SHARED: Enrollment - Cross County Membership Sort and Filter	~	Amailing Labels

- 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.

SHARED REPORTS		
STATE SHARED-Youth Enrollment Checks - INVOICE STEP 1 2 and 3 NEEDED (Copy)	Name: STATE SHARED-Youth Enrollment Checks - INVOICE STEP 1 2 and 3 NEEDED (Copy) Description: Invoice Step 1 Needed - https://texas4-h.tamu.edu/wp-content/uploads	🗈 Add Folder
	/4honline_manager_guide_county_invoice_enrollment_step1.pdf Category: Member	🕗 Edit Report

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.



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CUSTOM REPORT DETAILS

Report Columns		Edit
Partici	ipation	Enrollment District
Partici	ipation	Enrollment County
м	lember	Member Id
м	lember	Family Email
м	lember	Name: Last, First
Partici	ipation	Enrollment Role
Partici	ipation	Member Participation Status
Partici	ipation	Enrollment Date Created
Custom Filters		Enrollment Date Created
	5	Edit
Custom Filters	5	Edit
Custom Filters	5	Edit
Custom Filters Member Program Year Status in AND	5	Edit
Custom Filters Member Program Year Status is AND Payment Method Type is null	5	Edit
Custom Filters Member Program Year Status is AND Payment Method Type is null AND	5	Edit

✓ 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	

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