

TEXAS 4HONLINE COUNTY MANAGER GUIDE EVENT PAYMENTS - CUSTOM REPORTS CHECK NOT RECEIVED AND DECLINED CREDIT CARD



TOP RECOMMENDED WAY TO GET EVENT PAYMENT INFORMATION

It is recommended way to pull the event payment status all in one place is using the event reports. The report instructions provided will eliminate duplication of member rows. There are a few exceptions in the payment method column that might pull in extra record rows.

CREATE AN EVENT REPORT

• Click the Events link on the navigational pane.

 Search and click the name of the event from the events list

Home	Events	Awaiting Revie	w	
Managers	-			
Members	Events			
Participation				
Registrations	Search		Record Book	
Broadcasts	Hierarchy Leve	t	Any	
Animals				
Enrollments	Hierarchy Area			
Events				
Group Enrollment	Event ID	Program year	Event Name	Start D
Activities	811	2022-2023	2022 STATE 4-H Record Book Judging (Senior District Winners)	7/1/202
Activities Awards	811	2022-2023	2022 STATE 4-H Record Book Judging (Senior District Winners)	7/

- Click the Reports sub-tab along the top of the screen.
- Click the Add Folder button on the right side of the screen.
- Click the name of the folder created in the previous step.
- Click the Add Report button on the right side of the screen.

Custom Reports		
Queued Reports		
No Quoued Reports		
Training's D2 2020-21 Livestock Skill - Thon Reports		
-	Label: Training's 02 2020-21 Livestock Skill a Thor	a lleports
Vour report folders Report folders containing reports shared with you		Add Report

• Enter a report title and other information
--

• Click the blue Update button to create the report.

Edit Custom Report	×
Report Title	PAYMENT
Description	PAYMENT
Excel Worksheet Title	PAYMENT
	Cancel Update

• Click the blue Edit button in the areas to add columns and filters.

Co Report folders containing reports shared with you						
4HONLINE COLUMNS AND FILTERS						
REPORT COLUMNS	CUSTOM FILTERS	SCREENSHOT				
Registration: Registration STATE (status)	Registration STATUS is not equal to:	Report Columns For				
Registration: Registration Id	 Declined (not a payment status) 	Registration Registration State Revistration Revistration Id				
Member: County Name	Deleted	Member County Name				
Momber: Name Last First		Member Name-Last, First Payment Invoice Amount				
	• Incomplete	Payment Payment Method Type				
Payment: Invoice Amount	Resubmit					
Payment: Payment Method Type	 Awaiting Review 	Custom Filters Edit				
		Registration Status is equal to Declined, birlend, Incomplete, Resubmit, Awaiting Berlew				

EXPORT THE EXCEL FILE FROM THE SYSTEM

EXCEL FILTER

Filter the **REGISTRATION STATE** to:

• OUTSTANDING INVOICE

The family's credit card was declined or the county did not fully complete the <u>invoice steps</u> in order to send in the money. Checking the individual's <u>member profile</u> invoice will give the payment status of that person's event.

• PAYMENT NOT RECEIVED BY INSTITUTION

The county has completely created an invoice but the state office has not received the invoice and matching check.



ANY EXTRA 4HONLINE REPORT COLUMNS ADDED TO THE REPORT COULD DISPLAY INCORRECT DATA OR DUPLICATE ROWS BETWEEN MAY 2021 - OCTOBER 2021 SOME MAY NOT REPORT ACCURATE TRANSACTIONS. ISSUE REPORTED STATE-WIDE IN 2021

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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REGISTRATION APPROVED BUT PENDING PAYMENT

4HONLINE REPORT COLUMNS

4HONLINE CUSTOM FILTERS

Registration: Registration State Registration: Registration Id Member: County Name Member: Name-Last, First **Payment: Invoice Amount**

- Payment: Payment Method Type

Registration STATUS is not equal to: Declined (not a payment status)

- Deleted
- Incomplete
- Resubmit
- Awaiting Review

Regi	Registration State	
Regi	Registration Id	
	mber County Name	
	mber Name-Last, First	
P	ment Invoice Amount	
	ment Payment Method Type	

EXCEL FILTER

Filter the **REGISTRATION STATE** to:

OUTSTANDING INVOICE

The family's credit card was declined or the county did not fully complete the invoice steps in order to send in the money. Checking the individual's member profile invoice will give the payment status of that person's event.

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The county has completely created an invoice but the state office has not received the invoice and matching check.

JUNELINGHON						
1 Registration State	Contraction	t 👻	Invoice Amount 💌	Payment Method Type 💌		
A Sort A to Z	nderson		\$60.00	NonElectronic		
ZI a vizi a	nderson		\$25.00	NonElectronic		
A↓ Sort 2 to A	nderson		\$50.00	MasterCard		
Sort by Color	derson		\$25.00	NonElectronic		
Sheet View	derson		\$25.00	NonElectronic		
	nderson		\$25.00	NonElectronic		
∑ <u>Clear Filter From "Registration State"</u>	Iderson		\$25.00	MasterCard		
Filter by C	derson		\$25.00	NonElectronic		
Text Filter:	derson		\$25.00	NonElectronic		
	drews		\$25.00	NonElectronic		
Search	Indrews		\$20.00	NonElectronic		
	ndrews		\$10.00	NonElectronic		
	ndrews		\$25.00	NonElectronic		
- Awa.	ndrews		\$25.00	NonElectronic		
	ngelina		\$25.00	VISA		
	ngelina		\$10.00	MasterCard		
PaymentNotReceivedByInstitution	ngelina		\$25.00	MasterCard		
	ngelina		\$35.00	MasterCard		
	ngelina		\$75.00	MasterCard		
	ngelina		\$25.00	VISA		
OK Cancel	ngelina		\$75.00	MasterCard		

SCREENSHOT

REGISTRATION APPROVED AND PAID

4HONLINE REPORT COLUMNS

Registration: Registration State

Registration: Registration Id

Member: County Name

Member: Name-Last, First

Payment: Payment Amount

Payment: Payment Method Type

4HONLINE CUSTOM FILTERS

Registration **STATUS** is not equal to:

- Declined (not a payment status)
- Deleted
- Incomplete
- Resubmit
- Awaiting Review

SCREENSHOT



EXCEL FILTER

Filter the Registration STATE to:

Approved

Note: If there is an entry that shows Approved at the final level with no money items selected then the Payment Amount will show a zero amount. There's not a way for this entry to have anything added if the registration state is approved.

Registration State	Name-Last, First	Payment Amol	int 🛃 Payment Method Type 💽
∑↓ Sort A to Z	azoria	\$85.00	MasterCard
Z Sad Zha A	ау	\$85.00	VISA
AU 301210 A	omanche	\$85.00	VISA
Sort by Color	> oncho	\$85.00	NonElectronic
Sheet View	milton	\$85.00	VISA
	lufman	\$85.00	VISA
λ≩ <u>C</u> lea degistration State"	visher	\$85.00	VISA
Filter I	> hnson	\$80.00	VISA
Te.	> igelina	\$75.00	MasterCard
	ngelina 🚽	\$75.00	MasterCard
Search	cher	\$75.00	MasterCard
(Select All)	cher	\$75.00	VISA
Approved	cher	\$75.00	MasterCard
Awaiting Review Outstandinglovoice	istrop	\$75.00	VISA
PaymentNotReceivedByInstitution	ylor	\$75.00	NonElectronic
,	ylor	\$75.00	NonElectronic
	ylor	\$75.00	NonElectronic
	ylor	\$75.00	NonElectronic
	e	\$75.00	NonElectronic
	e	\$75.00	NonElectronic
OK Cancel	e	\$75.00	NonElectronic

SCREENSHOT

ANY EXTRA 4HONLINE REPORT COLUMNS ADDED TO THE REPORT COULD DISPLAY INCORRECT DATA OR DUPLICATE ROWS BETWEEN MAY 2021 - OCTOBER 2021 SOME MAY NOT REPORT ACCURATE TRANSACTIONS, ISSUE REPORTED STATE-WIDE IN 2021

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TEXAS 4HONLINE COUNTY MANAGER GUIDE EVENT PENDING PAYMENT AND REGISTRATION STATUS



PENDING REGISTRATION AND PAYMENTS							
4HONLINE REPORT COLUMNS	4HONLINE CU	JSTOM FILTER	RS	SCRE	ENSHOT		
Registration: Registration State Registration: Registration Id Member: County Name Member: Name-Last, First Payment: Invoice Amount Payment: Payment Method Type	Registration STAT	US is not equal t	to:	Registration Registration Registration Registration Registration Registration Member Courty Name Payment Invoke Amoun Payment Payment Netter Custom Filters Registration Registration	ate ni Ni Od Type	Fds Fds	
EXCEL FILTER	EXCEL FILTER SCREENSHOT						
 Filter the Registration STATE to: (should not Awaiting Review: County: The county needs to approve the r District: The district needs to approve the r Institution: The state needs to approved registration: The state needs to approved registration: Notes: Payment Method Type: » Visa, Master, Discover payment method processed when registration is approved » Check will show as a blank until registration and the county does their invoice steps. 	have to do this) egistration. egistration. gistration. will be d. tion is approved	A Registration State C Awaiting Review - District Awaiting Review - County Awaiting Review - County Awaiting Review - County Awaiting Review - District Awaiting Review - County Awaiting Review - County Awa	B Registratt 79164 82295 82596 82597 79158 82597 79158 82546 82649 82644 82604 79965 82308 82308 82309 82643 82388 82349 82643 82644 82644 82644 82644 82657 82644 82644 82657 82644 82657 82646 82657 82646 82657 82646 82657 82646 82657 82646 82657 82657 82657 82657 82657 82657 82657 82657 82657 82657 82657 82657 82657 82657 82769 82646 82657 82657 82769 82646 82657 82769 82646 82769 82778 82769 82778 827778 8277	C D ion Id County Name Name-Last, First Taylor Brown Name-Last, First Brown Brown Name-Last, First Tom Green Tom Green Neculloch Meculloch Mcculloch Neculloch Ilano Mcculloch Neculloch Runnels Runnels Sterling Runnels Sterling Sterling Sterling Brown Tom Green Tom Green Tom Green Tom Green Tom Green Tom Green Tom Green Tom Green Tom Green Tom Green	E 2 Invoice Amount 520.00 520.00	F Nt Payment Method Type VISA VISA MasterCard MasterCard MasterCard MasterCard MasterCard MasterCard Discover Discover VISA VISA	
 Exceptions: If there is an entry that shows Awaiting Remoney items selected then the Payment Arzero amount. There's not a way for this ent anything added unless returned to the fam 	view with no nount will show a ry to have ily for changes.	26 Awaiting Review - District 27 Awaiting Review - County 28 Awaiting Review - District 29 Awaiting Review - District 30 Awaiting Review - District 31 Awaiting Review - District 32 Awaiting Review - District 33 Awaiting Review - District 34 Awaiting Review - District 35 Awaiting Review - District 36 Awaiting Review - District 36 Awaiting Review - District	82369 82613 82792 82793 82794 82594 82595 82360 82591 82591 82577 82416	Runnels Nolan Mason Mason Mcculloch Mcculloch Runnels Mason Mcculloch Burnet	\$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00 \$20.00	MasterCard MasterCard MasterCard MasterCard MasterCard MasterCard VISA MasterCard	

EXTRA 4HONLINE REPORT COLUMNS ADDED TO THE REPORT COULD DISPLAY INCORRECT DATA OR DUPLICATE ROWS THERE ARE EXCEPTIONS TO THE INSTRUCTIONS ON AMOUNTS AND STATUSES IT'S IMPORTANT TO KNOW THAT UNTIL IT'S APPROVED FIXES TO PAYMENTS CAN BE MADE IF A REGISTRATION IS APPROVED THERE'S NOTHING THAT CAN BE DONE TO FIX ISSUES