

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



## **RECOMMENDED WAY TO GET EVENT PAYMENT INFORMATION** TIP: CREATE THE EVENT REPORT RIGHT AFTER THE EVENT OPENS

## **CREATE AN EVENT REPORT**

- Click the Events link on the navigational pane.
- Click the name of the event from the Events list.

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

- 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.

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	Key: Vour report folders	Lander, maning a salasaraa sersakok akarennen majorsa	Add Folder

• Enter the name of the report. Enter a name that will allow you to easily find it so it can be pulled periodically.

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

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

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4HONLINE REPORT COLUMNS	COLUMNS AND FILTERS 4HONLINE CUSTOM FILTERS	SCREENSHOT
Registration: Registration <b>STATE</b> (status) Registration: Registration Id Member: County Name Member: Name-Last, First <b>Payment: Invoice Amount</b> Payment: Payment Method Type Optional: Family Email Address	Registration <b>STATUS</b> is NOT equal to: • Canceled • Declined (is not a payment status) • Deleted • Incomplete • Resubmit • Awaiting Review AND • Payment Method Type is equal null	Report Columny         In
EXPO	ORT THE EXCEL FILE FROM THE SYSTEM	1
THE EXCEL FILE SHOULD BE FILTE	RED USING THE INFORMATION BELOW	SCREENSHOT
Filter the Registration STATE to: OUTSTANDING INVOICE		A manufacture of the second seco
	ake this report not accurate. One thing is that if the me I credit card to a 4H check instead. Checking the memb	mber

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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