TEXAS 4HONLINE COUNTY MANAGER GUIDE
EVENT PAYMENTS SHARED CUSTOM REPORT
CHECK PAYMENT DUE - INVOICE STEPS 2-5

texas.4honline.com
4-H Online
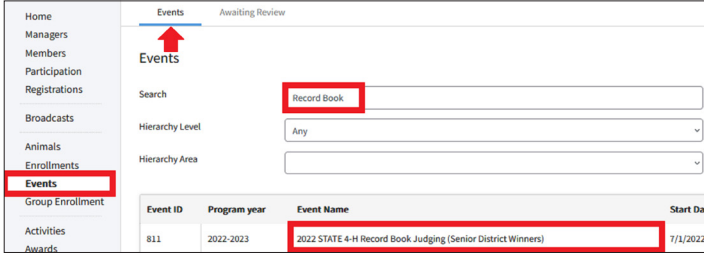4-H ENROLLMENT AND EVENT REGISTRATION

TEXAS A&M
AGRILIFE
EXTENSION

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.

• 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.

• Enter the name of the report. Enter a name that will allow you to easily find it so it can be pulled periodically.
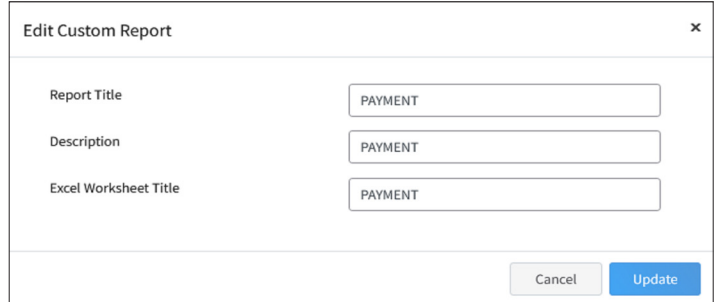
• Click the blue Edit button in each of the areas to add columns and filters.

COLUMNS AND FILTERS

4HONLINE REPORT COLUMNS	4HONLINE CUSTOM FILTERS	SCREENSHOT
Registration: Registration **STATE** (status)	Registration **STATUS** is NOT equal to:	
Registration: Registration Id	• Canceled	
Member: County Name	• Declined (is not a payment status)	
Member: Name-Last, First	• Deleted	
Payment: Invoice Amount	• Incomplete	
Payment: Payment Method Type	• Resubmit	
Optional: Family Email Address	• Awaiting Review	
	AND	
	• Payment Method Type is not null	
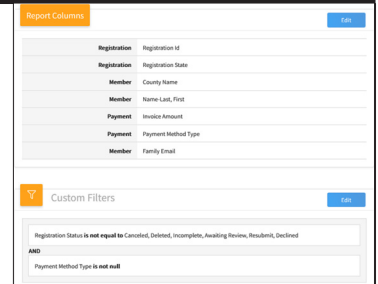
EXPORT THE EXCEL FILE FROM THE SYSTEM

EXCEL FILTER	SCREENSHOT
Filter the Registration **STATE** to: **PAYMENTNOTRECEIVEDBYINSTITUTION**	
Filter the Payment Method Type to remove all credit card types. There are a few exceptions that might make this report not accurate. One thing is that if the member changed the payment type from declined credit card to a 4H check instead. Checking the member's profile under the invoicing section for the event would be the best way to check it.	
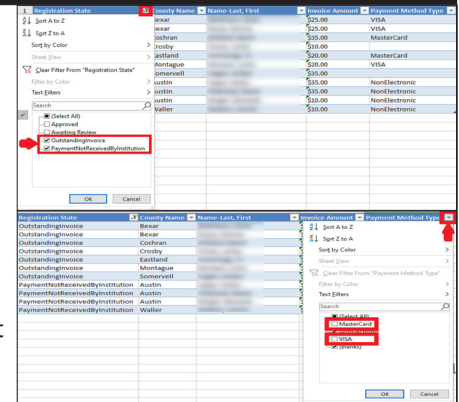
The county office is able to create a county invoice using steps 2-5 or 3-5 of the invoicing process: Events

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