

# TEXAS 4HONLINE COUNTY MANAGER GUIDE

# **EVENT PAYMENTS SHARED CUSTOM REPORT CHECK PAYMENT DUE - INVOICE STEPS 2-5**



# 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 Review			
Managers	•			
Members	Events			
Participation				
Registrations	Search		Record Book	
Broadcasts	Hierarchy Leve	el	Any	
Animals			Tany .	
Enrollments	Hierarchy Area			
Events				
Group Enrollment	Event ID	Program year	Event Name	Start D
Activities Awards	811	2022-2023	2022 STATE 4-H Record Book Judging (Senior District Winners)	7/1/202

- 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.						
Details Reports						
Custom Reports						
Queued Reports						
No Queued Reports						
Training's D2 2020-21 Livestoc	k Skill-e-Thon Reports		Label: Training's 02 2020-21 Livestock Skill-a-Thon Reports			
	Key:			☐ Add Folder		
	Your report folders Report folders containing reports shared with you			Add Report		

• 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.

## **COLUMNS AND FILTERS**

**4HONLINE CUSTOM FILTERS** 

## 4HONLINE REPORT COLUMNS

#### Registration: Registration STATE (status) Registration **STATUS** is NOT equal to:

Registration: Registration Id

Member: County Name

Member: Name-Last, First

**Payment: Invoice Amount** 

Payment: Payment Method Type

Optional: Family Email Address

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

• Payment Method Type is not null

# SCREENSHOT

# **EXPORT THE EXCEL FILE FROM THE SYSTEM**

## **EXCEL FILTER**

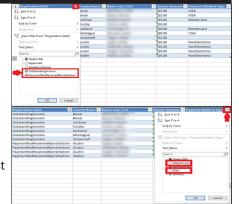
## **SCREENSHOT**

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