

PRIMARY COUNTY MANAGER INSTRUCTIONS**CLUB MANAGER ACCESS CHECKLIST**

A club manager can be given access to download a roster for their assigned club. There are seven main areas that need to be checked and adjusted before club manager access is activated. A volunteer without all areas of access will receive errors when logging into the club management screen.

1**VOLUNTEER APPROVAL AND PAYMENT**

A volunteer must be approved and paid in order to gain club manager access.

2**VOLUNTEER TYPE**

A volunteer must select Club volunteer when they enrolled.

3**CLUB MANAGER DESIGNATION**

A volunteer has to designate themselves as a club manager and not just a club volunteer. Only club managers will be able to access the club to download a roster.

4**CLUB AND CLUB MANAGER SELECTION**

The correct club and club manager designation for the club is required.

5**ASSIGNED PERMISSIONS FOR ACCESS**

The county must give access to the club manager before they are able to login without errors.

6**CLUB LEADER LOGIN CODE**

A leader login code is required for a volunteer to view the club manager screen. The leader login code is located in the club screen under that club's details.

7**ROSTER DOWNLOAD**

The club manager is given access to view certain fields of information in an Excel format. The Download Roster button is located on the club manager screen.

CONTINUE TO THE FOLLOWING PAGES FOR INSTRUCTIONS

PRIMARY COUNTY MANAGER INSTRUCTIONS

1

VOLUNTEER APPROVAL AND PAYMENT

A volunteer must be approved and paid in order to gain club manager access.

- Click the Enrollments link on the navigation menu.
- Click the Clear Filters Link.
- Type in just the volunteer's membership number in the Keywords area.
- Click the blue Search button.
- The results will appear at the bottom of the screen.

IF THE VOLUNTEER'S NAME APPEARS IN THE RESULTS AREA:

THE VOLUNTEER IS APPROVED AND PAID SO THEY CAN BE GIVEN ACCESS.

Home
Settings
Managers
Members
Participation
Registrations

Broadcasts
Animals
Enrollments
Events
Group Enrollment

Activities
Awards
Groups
Clubs

Screenings
Trainings

2025-2026
Program Year

[Approved](#)
[Payment Due](#)
[Awaiting Review](#)

Approved Enrollments

Keyword(s) Program Age, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary Name, Primary Phone

☐ Flagged

Clubs

Role

Displaying results 1 - 1 of 1

Last Name	First Name	Email	Role	Primary Unit Name	Grade	Status	Approval County	Approved Date
Cathy	Misty	familyemailaddress@gmail.com	Volunteer	Texas County Club		Approved	Training	8/25/2025

IF THE VOLUNTEER'S NAME DOES NOT APPEAR IN THE RESULTS AREA:

THE VOLUNTEER IS NOT APPROVED AND PAID SO THEY CANNOT BE GIVEN ACCESS.

Home
Settings
Managers
Members
Participation
Registrations

Broadcasts
Animals
Enrollments
Events
Group Enrollment

Activities
Awards
Groups
Clubs

Screenings
Trainings

2025-2026
Program Year

[Approved](#)
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Approved Enrollments

Keyword(s) Program Age, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary Name, Primary Phone

☐ Flagged

Clubs

Role

No results found

Last Name	First Name	Email	Role	Primary Unit Name	Grade	Status	Approval County	Approved Date
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CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

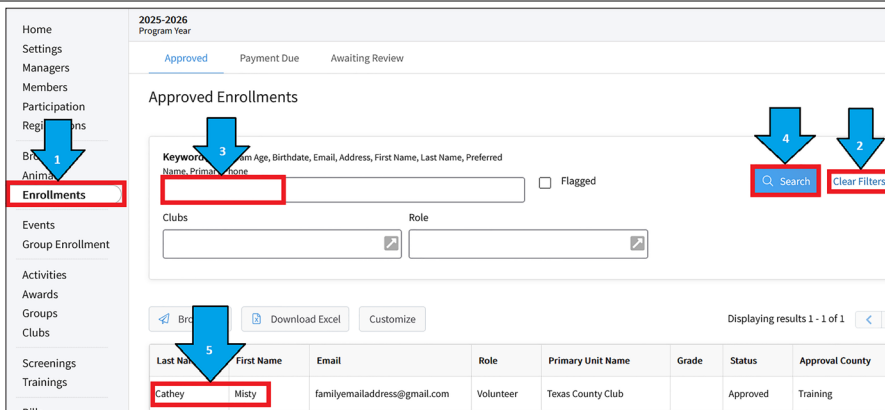
PRIMARY COUNTY MANAGER INSTRUCTIONS

2

VOLUNTEER TYPE

A volunteer must select Club volunteer when they enrolled.

- Click the Enrollments link from the left-side navigation menu.
- Click the Clear Filters link to reset any previous search criteria.
- Enter the volunteer's name or membership number in the Keywords field.
- Click the blue Search button.
- Click the volunteer's name that appears in the search results at the bottom of the screen.



1. Click the Enrollments link in the left navigation menu.

2. Click the Clear Filters button in the top right.

3. Enter the volunteer's name in the Keywords field.

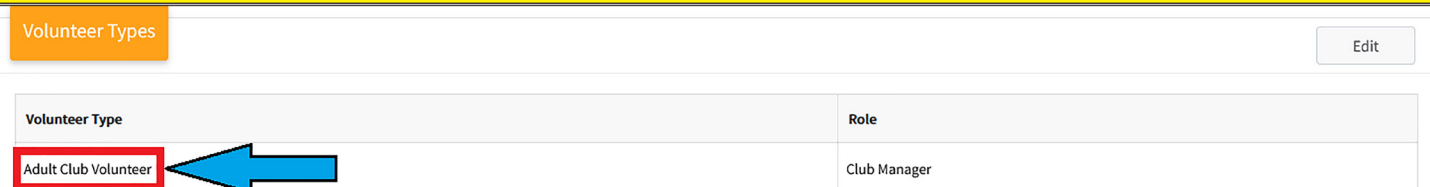
4. Click the Search button.

5. Click the volunteer's name in the search results table.

Last Name	First Name	Email	Role	Primary Unit Name	Grade	Status	Approval County
Cathey	Misty	familyemailaddress@gmail.com	Volunteer	Texas County Club		Approved	Training

IF THE CLUB VOLUNTEER OPTION APPEARS IN THE VOLUNTEER TYPE SECTION:

THE VOLUNTEER IS THE CORRECT VOLUNTEER TYPE SO THEY CAN BE GIVEN ACCESS.



Volunteer Types

Volunteer Type	Role
Adult Club Volunteer	Club Manager

IF THE CLUB VOLUNTEER OPTION DOES NOT APPEAR IN THE VOLUNTEER TYPE SECTION:

THE VOLUNTEER IS NOT THE CORRECT VOLUNTEER TYPE SO THEY CANNOT BE GIVEN ACCESS.

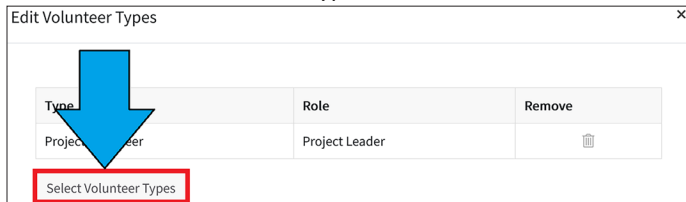
- Click the Edit button in the Volunteer Type section.



Volunteer Types

Volunteer Type	Role
Adult Project Volunteer	Project Leader

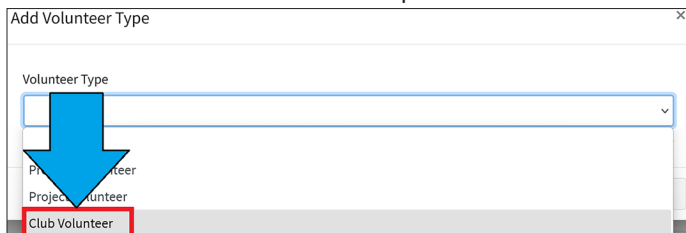
- Click the Select Volunteer Types button.



Edit Volunteer Types

Type	Role	Remove
Project Volunteer	Project Leader	

- Select Club Volunteer from the drop down menu.



Add Volunteer Type

Volunteer Type

Club Volunteer

- Click the blue Add button beside the Club Manager selection.



Add Volunteer Type

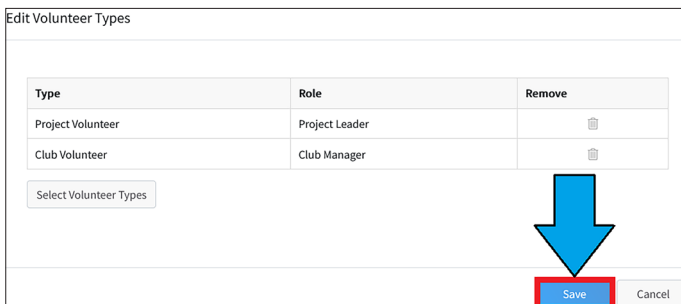
Volunteer Type

Club Volunteer

Club Manager

Parent Volunteer/Activity Leader (Most common)

- Click the blue Save button.



Edit Volunteer Types

Type	Role	Remove
Project Volunteer	Project Leader	
Club Volunteer	Club Manager	

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

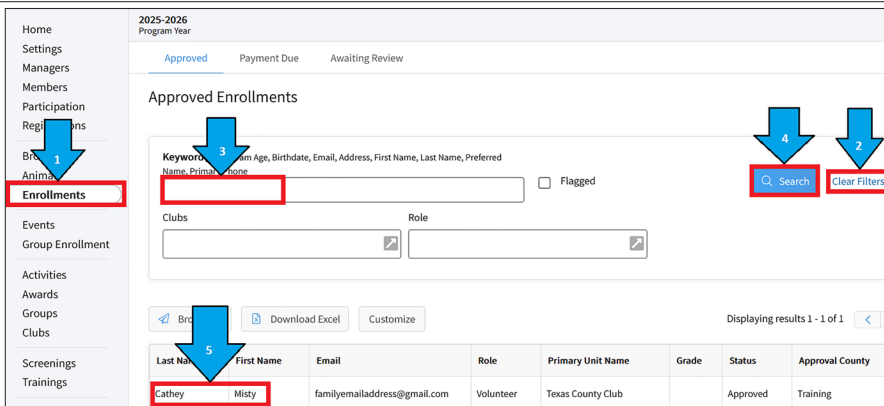
PRIMARY COUNTY MANAGER INSTRUCTIONS

3

CLUB MANAGER DESIGNATION

A volunteer has to designate themselves as a club manager and not just a club volunteer. Only club managers will be able to access the club to download a roster.

- Click the Enrollments link from the left-side navigation menu.
- Click the Clear Filters link to reset any previous search criteria.
- Enter the volunteer's name or membership number in the Keywords field.
- Click the blue Search button.
- Click the volunteer's name that appears in the search results at the bottom of the screen.



2025-2026 Program Year

Approved Payment Due Awaiting Review

Approved Enrollments

Keywords: Name, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary Unit

Clubs: [dropdown] Role: [dropdown]

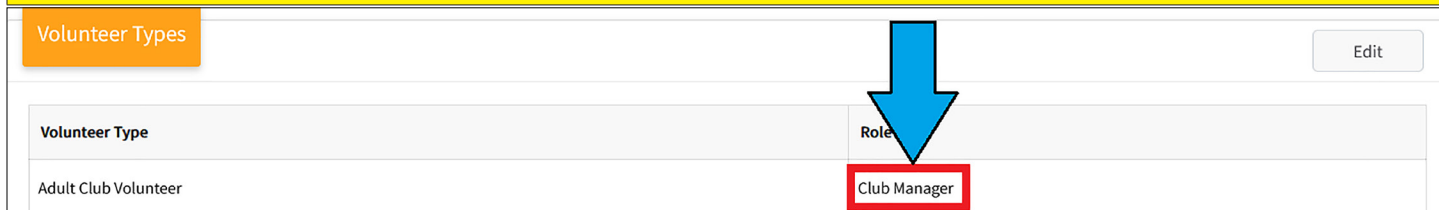
Download Excel Customize

Displaying results 1 - 1 of 1

Last Name	First Name	Email	Role	Primary Unit Name	Grade	Status	Approval County
Cathey	Misty	familyemailaddress@gmail.com	Volunteer	Texas County Club		Approved	Training

IF THE CLUB MANAGER OPTION APPEARS IN THE VOLUNTEER TYPE SECTION UNDER ROLE:

THE VOLUNTEER IS THE CORRECT VOLUNTEER ROLE SO THEY CAN BE GIVEN ACCESS.



Volunteer Types

Edit

Volunteer Type	Role
Adult Club Volunteer	Club Manager

IF THE CLUB MANAGER OPTION DOES NOT APPEAR IN THE VOLUNTEER TYPE SECTION UNDER ROLE:

THE VOLUNTEER IS NOT THE CORRECT VOLUNTEER ROLE SO THEY CANNOT BE GIVEN ACCESS.

- Click the Edit button in the Volunteer Type section.

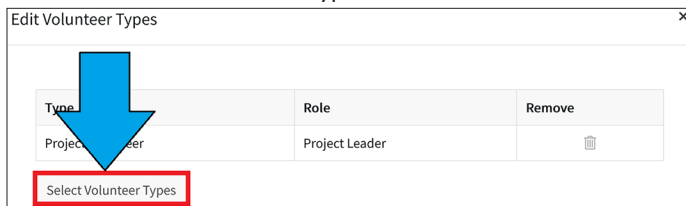


Volunteer Types

Edit

Volunteer Type	Role
Adult Project Volunteer	Project Leader

- Click the Select Volunteer Types button.

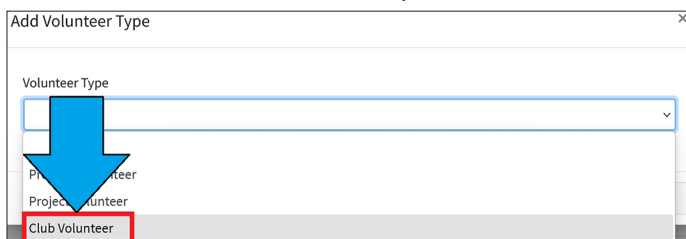


Edit Volunteer Types

Type	Role	Remove
Project Volunteer	Project Leader	[trash icon]

Select Volunteer Types

- Select Club Volunteer from the drop down menu.



Add Volunteer Type

Volunteer Type

Club Volunteer

- Click the blue Add button beside the Club Manager selection.



Add Volunteer Type

Volunteer Type

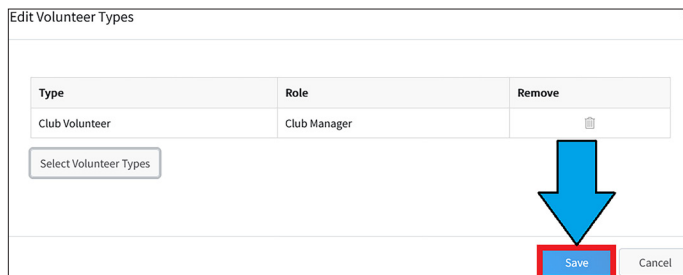
Club Volunteer

Club Manager

Parent Volunteer/Activity Leader (Most common)

Add

- Click the blue Save button.



Edit Volunteer Types

Type	Role	Remove
Club Volunteer	Club Manager	[trash icon]

Select Volunteer Types

Save Cancel

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

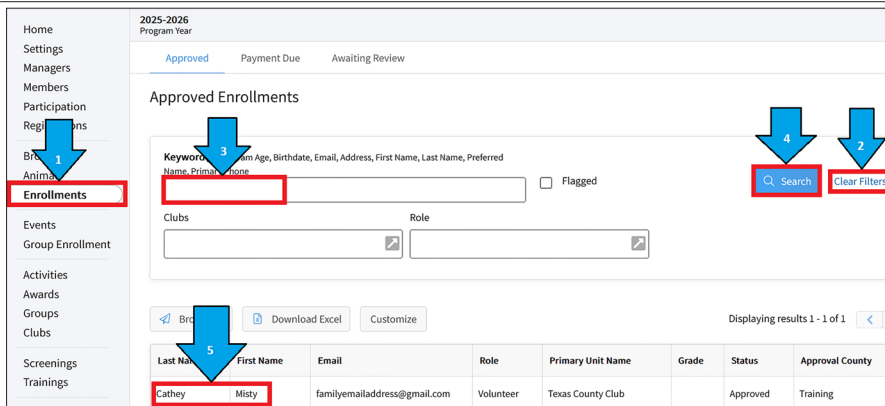
PRIMARY COUNTY MANAGER INSTRUCTIONS

4

CLUB AND CLUB MANAGER SELECTION

The correct club and club manager designation for the club is required.

- Click the Enrollments link from the left-side navigation menu.
- Click the Clear Filters link to reset any previous search criteria.
- Enter the volunteer's name or membership number in the Keywords field.
- Click the blue Search button.
- Click the volunteer's name that appears in the search results at the bottom of the screen.



2025-2026 Program Year

Approved Payment Due Awaiting Review

Approved Enrollments

Keywords: Name, Primary, Age, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary, Role

Clubs: Role

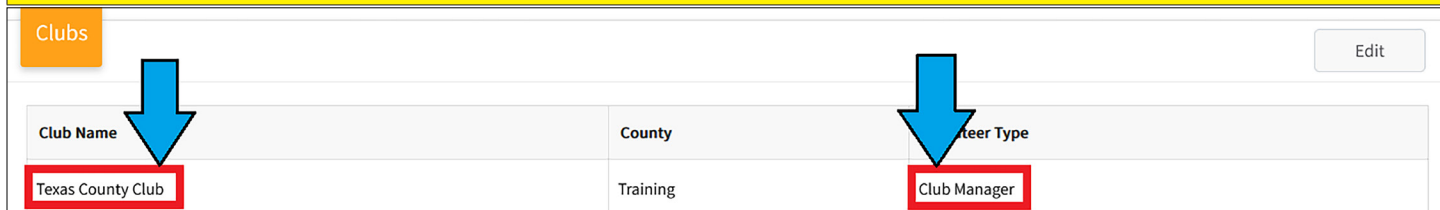
Download Excel Customize

Displaying results 1 - 1 of 1

Last Name	First Name	Email	Role	Primary Unit Name	Grade	Status	Approval County
Cathy	Misty	familyemailaddress@gmail.com	Volunteer	Texas County Club		Approved	Training

IF THE CLUB NAME AND CLUB MANAGER OPTION APPEAR IN THE CLUBS SECTION:

THE VOLUNTEER HAS THE CORRECT CLUB AND VOLUNTEER TYPE SO THEY CAN BE GIVEN ACCESS.



Clubs

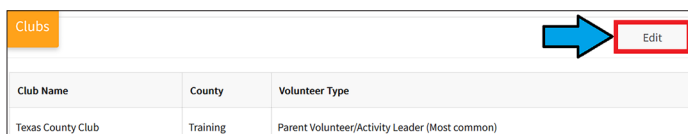
Edit

Club Name	County	Volunteer Type
Texas County Club	Training	Club Manager

IF THE CLUB NAME AND CLUB MANAGER OPTION DOES NOT APPEAR IN THE CLUBS SECTION:

THE VOLUNTEER DOES NOT HAVE THE CORRECT CLUB AND VOLUNTEER TYPE SO THEY CANNOT BE GIVEN ACCESS.

- In the Clubs section, click the Edit button.

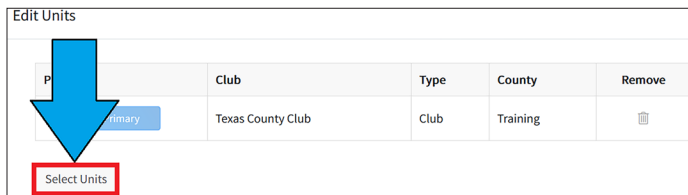


Clubs

Edit

Club Name	County	Volunteer Type
Texas County Club	Training	Parent Volunteer/Activity Leader (Most common)

- Click the Select Units button.




Edit Units

Select Units

Primary	Club	Type	County	Remove
Primary	Texas County Club	Club	Training	

- Select Club Manager from the Volunteer Role dropdown menu.
- Click the blue Add button next to the club name.



Edit Unit

Primary Club Type County Volunteer Type

Primary Texas County Club Club Manager

Swap Club

Save Cancel

- Click the blue Save button to apply the changes.



Primary Brazos 4-H Archery Club Club Brazos

Select Units

Save Cancel

- In the Clubs section, click the name of the club.

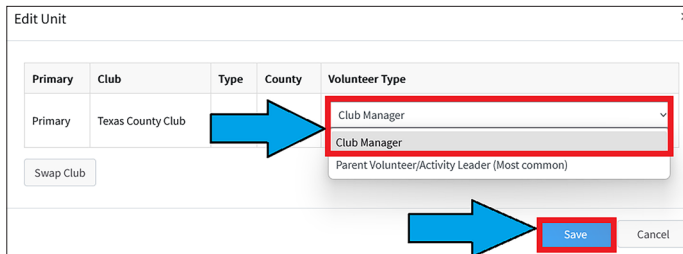


Clubs

Edit

Club Name	County	Volunteer Type
Texas County Club	Training	

- Select Club Manager from the drop down menu.
- Click the blue Save button to apply the changes.



Edit Unit

Primary Club Type County Volunteer Type

Primary Texas County Club Club Manager

Swap Club

Save Cancel

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

PRIMARY COUNTY MANAGER INSTRUCTIONS

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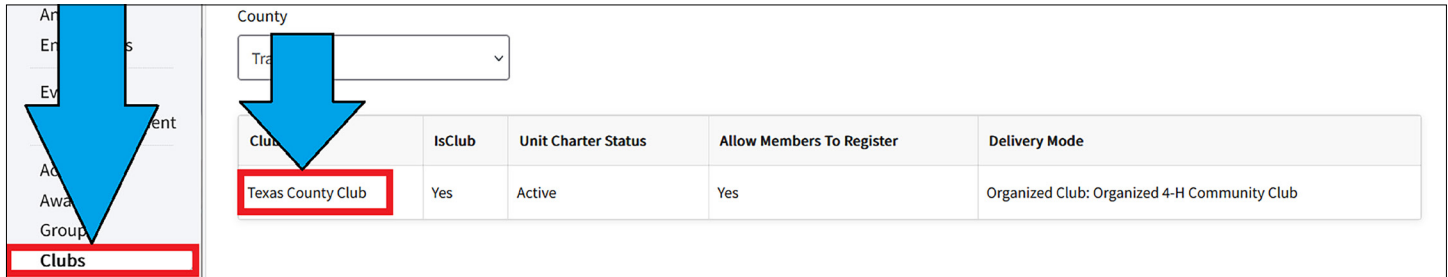
ASSIGNED PERMISSIONS FOR ACCESS

The county must give access to the club manager before they are able to login without errors. The error in the image to the right will appear if a volunteer does not have permissions assigned.



Unauthorized to view or update data

- Click on the Clubs link in the navigation menu.
- Click the club name from the list.



County	Club	IsClub	Unit Charter Status	Allow Members To Register	Delivery Mode
Texas	Texas County Club	Yes	Active	Yes	Organized Club: Organized 4-H Community Club

- Click the Adult's name in the Club Leaders section.



Last Name	First Name	Roles	Participation Status	Status
Cathey	Misty	Club Manager	Approved	Active

IF THE PERMISSIONS ARE SET TO READ:

THE VOLUNTEER HAS BEEN GRANTED PERMISSIONS TO THE CLUB CORRECTLY.

Edit Misty Cathey's Permissions



Member Personal Data

Read

Enrollment Approval

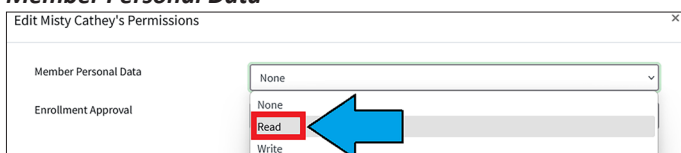
Read

IF THE PERMISSIONS ARE SET TO NONE:

THEY HAVE NOT BEEN GRANTED PERMISSIONS TO THE CLUB CORRECTLY.

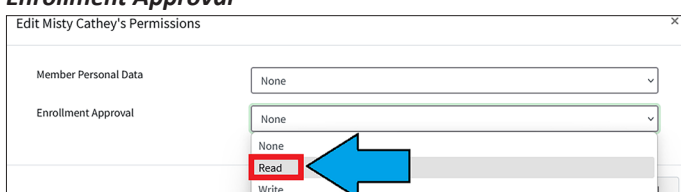
- Select Read from the Data and Enrollment drop down menus.

Member Personal Data



Member Personal Data: None, Read, Write

Enrollment Approval



Enrollment Approval: None, Read, Write

- Click the blue Save button to apply the changes.



Save Cancel

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

PRIMARY COUNTY MANAGER INSTRUCTIONS

6

CLUB LEADER LOGIN CODE

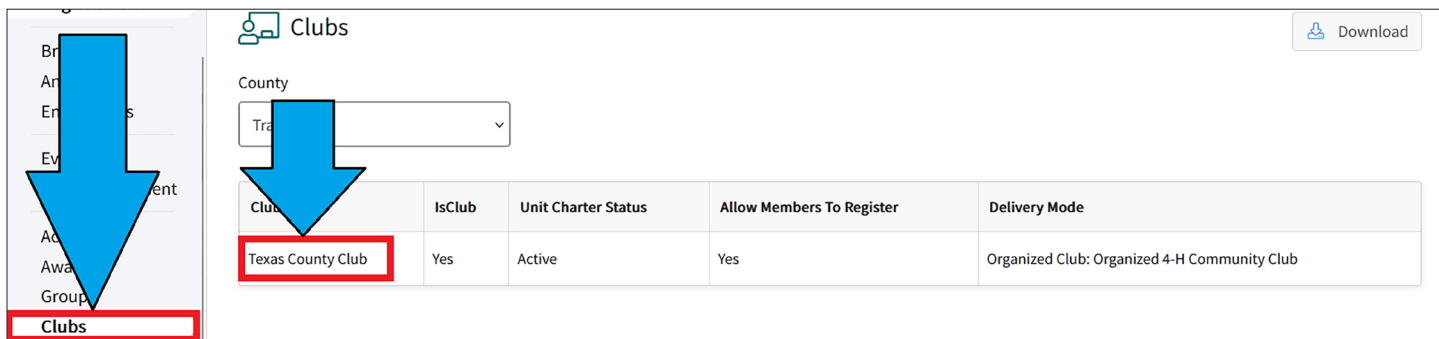
A leader login code is required for a club manager to access the club manager screen. The leader login code is located in the club screen under that club's details. The error in the image to the right will appear if a volunteer does not type in the correct leader login code.



Invalid or missing Club Credentials



- Click on the Clubs link in the navigation menu.
- Click the club name from the list.

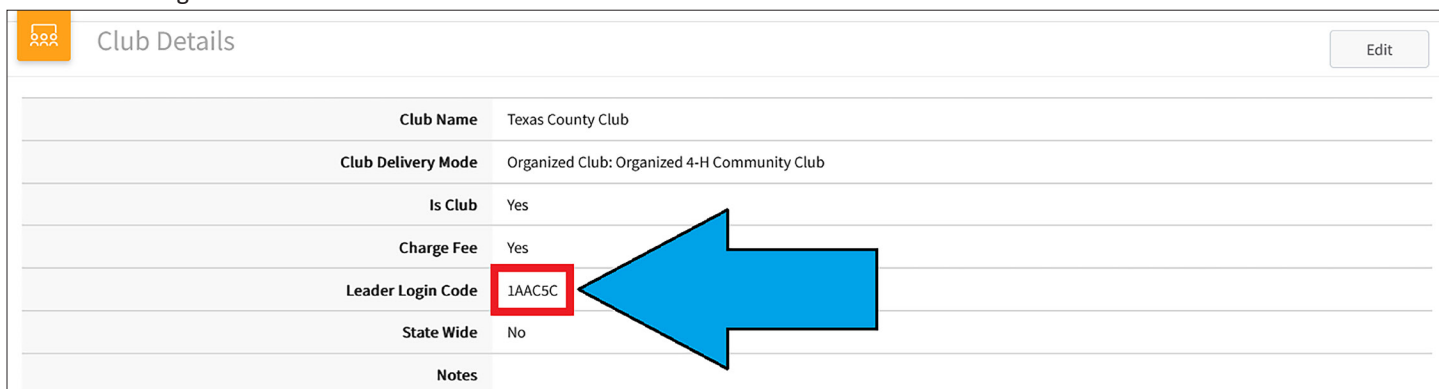


Clubs

County: Texas

Club	Is Club	Unit Charter Status	Allow Members To Register	Delivery Mode
Texas County Club	Yes	Active	Yes	Organized Club: Organized 4-H Community Club

- The Leader Login Code is located in the Club Details section.



Club Details

Club Name	Texas County Club
Club Delivery Mode	Organized Club: Organized 4-H Community Club
Is Club	Yes
Charge Fee	Yes
Leader Login Code	1AAC5C
State Wide	No
Notes	

ABOUT LEADER LOGIN CODES

- The leader login code cannot be customized.
- The leader login code may not work for county managers logged in through their own accounts.
- The leader login code will not work if all settings and permissions are not set correctly.

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

PRIMARY COUNTY MANAGER INSTRUCTIONS

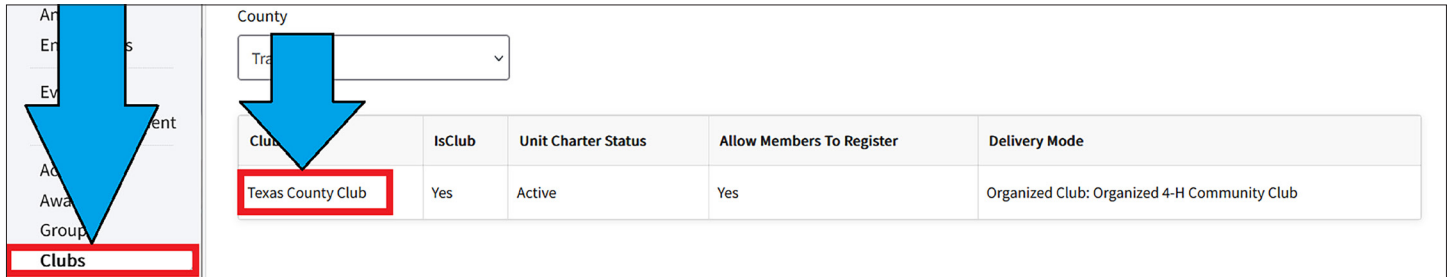
7

DOWNLOAD ROSTER

The club manager is given access to view certain fields of information in an Excel format. The Download Roster button is located on the club manager screen. The error in the image to the right will appear if a volunteer does not have the correct permissions assigned.

✖ Could not retrieve report OK ✖

- Click on the Clubs link in the navigation menu.
- Click the club name from the list.



County	Club	IsClub	Unit Charter Status	Allow Members To Register	Delivery Mode
Texas	Texas County Club	Yes	Active	Yes	Organized Club: Organized 4-H Community Club

- Click the Adult's name in the Club Leaders section.



Last Name	First Name	Roles	Participation Status	Status
Cathey	Misty	Club Manager	Approved	Active

IF THE PERMISSIONS ARE SET TO READ:

THE VOLUNTEER HAS BEEN GIVEN ACCESS TO LOGIN TO THE CLUB MANAGER SCREEN AND TO DOWNLOAD A ROSTER.

Edit Misty Cathey's Permissions

✖

Member Personal Data

Read

Enrollment Approval

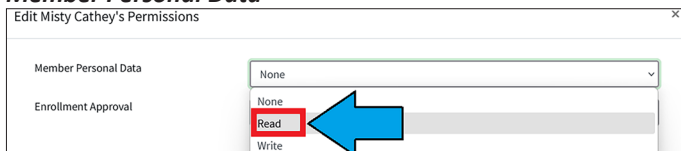
Read

IF THE PERMISSIONS ARE SET TO NONE:

THE VOLUNTEER HAS NOT BEEN GIVEN ACCESS TO THE LOGIN TO THE CLUB MANAGER SCREEN AND TO DOWNLOAD A ROSTER.

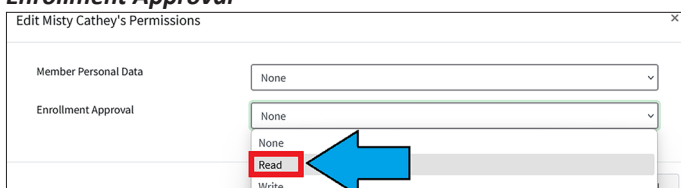
- Select Read from the Data and Enrollment drop down menus.

Member Personal Data



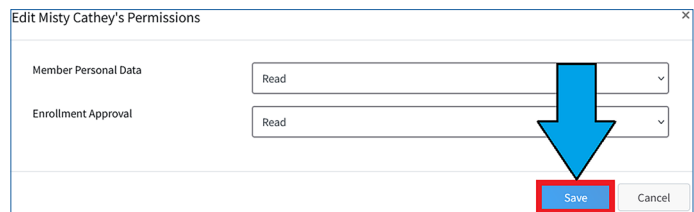
Member Personal Data: None, Read, Write

Enrollment Approval



Enrollment Approval: None, Read, Write

- Click the blue Save button to apply the changes.



Save Cancel

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE

INFORMATION PROVIDED ON THE ROSTER

Club managers will not have the ability to edit or modify an individual's profile.

The club roster, which can be downloaded from the Club Manager screen, should be stored securely on the manager's computer.

If printed, it must also be kept in a secure physical location to protect personal information.

- | | | |
|---------------------|-------------------------|----------------------------------|
| • Member ID | • Role | • Guardian 2 Last Name |
| • Enrollment Status | • Volunteer Role | • Guardian 2 Phone |
| • Primary | • Gender | • Emergency Contact |
| • Last Name | • Family Email | • Emergency Phone |
| • First Name | • Family Phone | • Emergency Email |
| • Middle Name | • Family County | • Emergency Contact Relationship |
| • Member Email | • Guardian 1 First Name | • Address |
| • Program Age | • Guardian 1 Last Name | • City |
| • Years In Program | • Guardian 1 Phone | • State |
| • School Grade | • Guardian 2 First Name | • Zip |

THE COUNTY OFFICE CAN GENERATE A CUSTOM REPORT FOR ANY ADDITIONAL INFORMATION NOT INCLUDED IN THE FILE. BIRTHDATES OR ANY OTHER INFORMATION CONSIDERED PII SHOULD NOT BE INCLUDED

CLICK CONTROL F5 OR CLICK TO REFRESH BROWSER AFTER CHANGES ARE MADE