TEXAS 4HOnline
http://texas.4online.com

**TEXAS.4HONLINE.COM
COUNTY MANAGER GUIDE**

**TEXAS A&M
AGRILIFE
EXTENSION**

CREATING AN INVOICE

STEPS MUST BE DONE IN THE FOLLOWING ORDER

STEP 1 - Recording Payment

**Recording Enrollment Payments Received in County Office
Once this step is done you cannot undo it!**

Be sure to only mark the payment for members as being received when it has been turned into the office. If you do not collect payments from your families, you can make a note in the payment notes section.

1. Click on Enrollments in the navigation pane.
2. Click on the Payment Due subtab.
3. The list of members that have submitted enrollment and indicated they would make payment in the county office is listed. Click on a member name to record their payment information when it has been received.

4. Select the items that have been received.
5. Select the date the payment was received.
6. Use the Payment Note field(s) to record the check number or that it was a cash payment, receipt number, or any other notes that you need to keep record. This may be where you note that the county is paying for this fee.
7. Click the Approve button.
8. Payments should only be recorded after they have been received from the family for accurate record keeping.

At the time a County Manager marks a payment as received, they are confirming they have received the payment and are taking responsibility for any amount owed to the State 4-H Office. The system will automatically list the County Credits. This is the equivalent to the payment amount received by members and is payable to the State.

STEP 2 - Creating Invoice
County Manager Creating an INVOICE
Once this step is done you cannot undo it!

Before You Start - You must complete step 1 first!

County Managers with the appropriate permissions can create a County Bill. Enrollment bills will be separated by the member role (Adult Volunteer AND Club Member). The bill will include the enrollment fee for youth and volunteer application fee for adults that indicated they would pay by check and the county has marked that they have received payment.

1. Click on Bills in the navigation pane. 2. Click the + Add Bill button.	
3. Click the + Create Bill for $X.00 button. The screen displays each member that is included in the bill and the total amount due to the State 4-H Office. 4. The Bill is automatically generated in the system. A separate Bill will be created for each role (Club Member, Volunteer). The procedures for sending in funds to the state 4-H office will remain the same as in 4HConnect. You may send 1 check for multiple invoices. 5. The screen will display whether any more County Credits are payable to the State.	
6. County Managers may review the list of County Bills and the status of them. The Received column will indicate Yes or No whether the State Office has marked the payment as received.	

7. Click the Bill to print out from the list.
8. Click on the Invoice button. Send in the invoice along with the check payment.

ONLY COUNTY AND 4H CHECKS CAN BE ACCEPTED - NO PERSONAL CHECKS

County Bill

Bill Details | Invoice

Invoice #	7273
County	State Office
Type	Enrollment
Date Created	8/31/2020
Amount Due	$25.00
Amount Outstanding	$25.00
Program Year	2020-2021
Received	No

Members

First Name	Last Name	Date Collected	Primary Club	Program Year	Role	Notes	Amount
4HOnline Test	4-H Test	9/1/2020	D-9 4-H Council	2020-2021	ClubMember	Check #1234	$25.00

STEP 3 - Mailing 4-H County/Club Check Instructions
READING THE INVOICE AND MAILING INSTRUCTIONS
NO PERSONAL CHECKS ACCEPTED - AUTOMATIC RETURN TO COUNTY OFFICE

Invoice #: Auto-generated number assigned
Invoice Date: The date the invoice was generated
Status: Draft status will be assigned until the State 4-H Office has received and marked paid.
Program Fee: The program fee refers to enrollment fees and application fees collected for youth and adults. Event names will be listed if applicable.

Make Checks Payable to: Texas A&M AgriLife Extension

United States Postal Service:

Texas A&M AgriLife Extension/4HOnline
2473 TAMU
College Station, TX 77843-2473

Overnight mail through either FedEx, UPS, or Lonestar:

Texas A&M AgriLife Extension/4HOnline
Texas A&M University
1470 William D Fitch Parkway
College Station, TX 77845

Texas 4-H Youth Development   **INVOICE**
Payable to: Texas A&M AgriLife Extension
2473 TAMU
College Station, TX 77843

INVOICE #	7273
INVOICE DATE	08/31/2020
STATUS	Draft

BILL TO
State Office County

DESCRIPTION	QTY	PRICE	TOTAL
Program fee : 4HOnline Test 4-H Test	1	$25.00	$25.00
	TOTAL		$25.00

Texas 4-H Youth Development   **INVOICE**
Payable to: Texas A&M AgriLife Extension
2473 TAMU
College Station, TX 77843

INVOICE #	4184
INVOICE DATE	08/25/2020
STATUS	Paid
PAID DATE	08/25/2020
PAID AMOUNT	$85.00

BILL TO
Moore County

DESCRIPTION		QTY	PRICE	TOTAL
Program fee :	**Each name listed here**	1	$25.00	$25.00
Program fee :		1	$10.00	$10.00
Program fee :		1	$25.00	$25.00
Program fee :		1	$25.00	$25.00
		TOTAL		$85.00

QUICK VIDEO OVERVIEW - CREATE AN INVOICE