QUICK STEPS TO ROUTINE ACTIONS IN 4-H CONNECT

For those that want it short and sweet below are some steps for various routines in 4-H CONNECT that you can use. We will be publishing and releasing over the next week some illustrated sheets of the procedures below

CHANGING A 4-H FAMILY FROM ONE COUNTY TO ANOTHER

Note: the County that the family is moving from is responsible for making the change. Therefore, if the new county has been contacted by the incoming family you will need to take their family and member names, called the 'exiting' county and ask them to move their county of membership.

1. Log into 4-H CONNECT
2. Go to your Enrollment dashboard, click on the families tab.
3. Type the family name in the box, click on search
4. Once family is located (make sure it is the correct one), click "edit" button and access family on screen.
5. Click on the "Edit Family" link beside the family name
6. Using the pull down list beside the line called "4-H County" select the families new county name.
7. Click "Continue"
8. Family is now in their new county!

ADDING A 4-H CLUB

1. Log into 4-H CONNECT
2. Click on the "Clubs" icon
3. On the top left area of the screen is a link called "Add Club," click it.
4. Proceed with completing all the information pertaining to the club.
5. Click the save button to save the club.
6. It is now online for 4-H members to add to their enrollment!

DELETING A 4-H CLUB – MAKING IT INACTIVE

You can no longer delete a 4-H Club from 4-H CONNECT, however, you can make it inactive to where it will not be seen in case the club is organized again at a later date. This will help maintain all the last chartering information as well as the EIN number. To make a club inactive:

1. Log into 4-H CONNECT
2. Click on the "Clubs" icon.
3. Click the "Edit" button beside the club you want to make Inactive.
4. Once in the club information, there is a line midway down called "Is this Club Inactive (Closed or On Hold)," click the box beside the line.
5. Click "Save" at the bottom of screen.
6. Club is now Inactive and cannot be seen by 4-H families.

SELECTING THE PAYMENT TYPES FOR ENROLLMENT AND EVENT REGISTRATION

County Offices can decide which payment methods they will accept for 4-H families to use to pay enrollment and event registrations. These options can be changed whenever you need to. Please know that if you turn off the "club/county check" option and someone can only pay by cash, you will need to turn the option back on process the enrollment/event registration, receipt the funds, and then prepare a check and invoice which is mailed to the Texas 4-H Foundation.

1. Log into 4-H CONNECT
2. Click the "Options" icon.
3. Scroll to the bottom of the screen.
4. There you will see the four payment options. Use your mouse and click the boxes beside the payment methods you will allow your 4-H families to use.
5. Click the "Save" button.

CREATING A TRANSFER (INVOICE) TO PAY ENROLLMENT AND/OR EVENT REGISTRATION WITH CLUB/COUNTY CHECK

1. Log into 4-H CONNECT
2. Click the "Finances" tab at the top of the screen.
3. Underneath the "Transfers" (transactions) icon is a link called "Quick Add," click it!
4. You will now see two sections on this screen, the top are any enrollments that need to have a transfer (invoice) created and paid. The bottom is any event registrations that need to be paid.
5. Click the "Create" button beside the item you wish to create the transfer (invoice) for.
6. The next screen allows you to select the ones you wish to pay if not paying for all of those listed. Once you have the correct one's selected, click "Save" (two buttons – take your choice!)
7. A verification screen will appear. This confirms the information for this transfer (invoice). Here is where you will:
    a. Print the transfer (invoice) - Use the pull down list in the top right corner called "Quick Reports" and select "Financial – Transfer. It will open up in a pdf document.
    b. Delete it completely – Cick the "Delete" Button
    c. Return back to your transfer (invoice) page – Click the "Exit" button
    d. Edit who you are paying from – Click the "Select Invoices" button.
8. Once you are complete and have printed your transfer form (invoice). Mail it and your club/county check to the Texas 4-H Foundation.

YOU DO NOT HAVE TO HAVE THE NUMBER OF THE CHECK YOU ARE PAYING BY ANYMORE!!!

CHECKING THE STATUS OF A PAYMENT I HAVE MAILED TO THE TEXAS 4-H FOUNDATION

1. Log into 4-H CONNECT.
2. Click the “Finances” tab at the top of the screen.
3. Using the dashboard under the “Transfer” (transactions)
4. Select either the “Enrollment” or “Event Registration” option under the “Financial Category” field.
5. A list of those paid and unpaid transactions should appear (if not make sure all other boxes are un-checked).
6. All “Paid” payments that Texas 4-H Foundation has received and been able to process will be noted by a green check mark under the paid column.

PLACING YOUR 4-H NEWSLETTER ON YOUR 4-H FAMILIES HOMEPAGE IN 4-H CONNECT

One of the cool things that you can now do is upload your county 4-H newsletters and other announcements about your county 4-H Program onto the home page of every 4-H family. Then, when they log onto 4-H CONNECT they can download and read the latest news. The days of “I don’t receive the 4-H Newsletter!” are on the verge of going away if they have a profile on 4-H CONNECT!!!!

1. Log into 4-H CONNECT.
2. Click the “Connect” tab at the top of the screen.
3. Click the “Newsletter” icon
4. Click the link below the icon bar called “Add Newsletter.”
5. A dialogue box will appear for you to name your newsletter. (Example may be “Texas 4-H Standard – August 2011). We would encourage to include at least the month of the document.
6. You will be prompted to another screen where you can edit the title, add the date of the document (reference only), and who can view the newsletter – families or managers, or both.
7. Click the “Attach pdf” button to the right to locate your document (must be in pdf format). Once selected, click the “Open” in the dialogue box to upload the document.
8. Click the “Save” button and newsletter is now uploaded and visible.

To remove the newsletter once it has been viewed for a certain period of time (HINT: you don’t want to have too many newsletters and announcements on your families homepage – you may get nominated for the Hoarders TV show!).

9. Return back to the Newsletter section, click the “Edit” button beside the document you want to remove.
10. Click the “Delete” button and the document will be removed!

SENDING A MASS E-MAIL MESSAGE TO YOUR 4-H FAMILIES ON 4-H CONNECT

Using the internal email messaging system you can now send announcements to your 4-H families, second parent/guardian, second household, and emergency contact. These emails are for messages only – no external attachments. It has the ability to send to anyone from a custom report you have developed.

First Things First! If you want to send an email to only a certain select group of people you need to create under the Custom Reports (Reports -> Custom) the report. This may be just your club presidents, your club managers, a certain club, etc.

1. Log into 4-H CONNECT.
2. Click on the “Connect” tab at the top of the screen.
3. Click the “Broadcast Email” icon.
4. Click on the link called “Add Broadcast Email” under the icon bar.
5. A dialogue box will appear asking for a name of the email. Type a title.
6. Next screen will ask who all you want the email to be delivered to (family only, secondary parent/guardian, secondary household, emergency contact). Select your choices, then click “Continue.”
7. Type the “Subject” of the email. Click “Continue”
8. Next you will see a WYSIWYG (What you see is what you get) box where you can type, build, and create an email. This box allows you to include graphics (caution – do not include large graphics because it may not be deliverable due to size), links, you can change font, colors, etc.
9. Type your email that you would like send and format! If you want to include certain fields, as to personalize it with family name, address, etc, you can click on the “Merge Fields/Docs” box to the left. This brings up a list of fields you can merge into the email. You can also attach a direct link to any document you have uploaded by click on the “Newsletter” link at the top of the merge box (Family on one side ~ Newsletter on the other).
10. Once you have type your email you can preview it to ensure it looks correct by clicking the “Preview Email” button.
11. Once complete, click the “Save” button then the “Continue” button.
12. Next screen allows you to select the custom report to send the email to. Click the “Select Reports” box and a list of all your custom reports will be displayed. Select the one’s you want the message to be sent to. Click “Continue” once all the report(s) are selected.
13. This is the “trigger” screen. If everything is correct and you are ready to send, click the “Send Now” button and then the “Finish” button.
14. Email sent!

MORE TO COME AND WE HOPE THIS HELPS!