

## Club Leader Options

### Before You Start

Before you can login as a club leader, you must have an active enrollment record for the current year, and you must be designated as a club leader on your Participation/Clubs screen. Contact the County Extension Office to obtain club login permissions and your club password and login information.

When you first login, the default view is Confirm Members. You may see a screen with “There are no records”, depending on the permissions that the county has given to club leaders. If your county allows leaders to approve members, you are in the right place to do that.



Clicking the Members icon returns a list of all the ACTIVE members of your club—the ones who have enrolled or re-enrolled, and been approved by the county 4hOnline manager.

**\*\*This list includes all club members, regardless of whether this club is their primary or secondary club.**



To see a list of members and leaders associated with your club including those who are not active yet, click on the **Search** icon. If necessary, click “Clear Filters” to see a list of all youth/leaders that have been associated with your club, regardless of whether they have enrolled for the current year yet.

**\*\*The Search screen only lists members and leaders who have this club listed as their primary club, not the secondary memberships.**

Members/Volunteers

Keyword(s) (4-H Age, Address, Birthdate, Email, First Name, Preferred Name, Last Name, Primary Phone)

Search Clear Filters

Enrollment Date From To Clear Dates

Flagged Yes No Gender Male Female

Role Adult Contact Custom Youth Status Active Archived Incomplete Not Participating Pending Short-Term Volunteer Yes No

18 records returned

Flag Options Email List Add Family Email to Flagged Members Email to Search Results

| Name           | V | Years | Member # | Status   | 4H Age | Role  | Gender | Primary Club     | Enrollment   | Approved     | Login |
|----------------|---|-------|----------|----------|--------|-------|--------|------------------|--------------|--------------|-------|
| Brown, Charlie | V | 3     | 674684   | Inactive | 37     | Adult | Male   | Bouncing Bunnies | Nov 02, 2015 | Nov 12, 2015 | Login |
| Brown, Renee   | V | 1     | 0        | Inactive | 0      | Adult | Female | Bouncing Bunnies | Jan 30, 2016 |              | Login |

To send a quick email/text message from the Search screen, Flag the appropriate members and click on “Email to Flagged Members”

To get a quick list of the information that is on screen, either from the Members screen or the Search screen click on the little Excel icon at the top right of the list of names. The Quick Exports pull-down at the top of the screen (Search-List) does the same thing.



To get a quick list of the email addresses associated with the list on screen, from the Search screen, click the Email List button. A popup window will come up with the addresses for you to copy & paste into your email client (consider using the BCC field so that you are not providing email addresses to everyone).

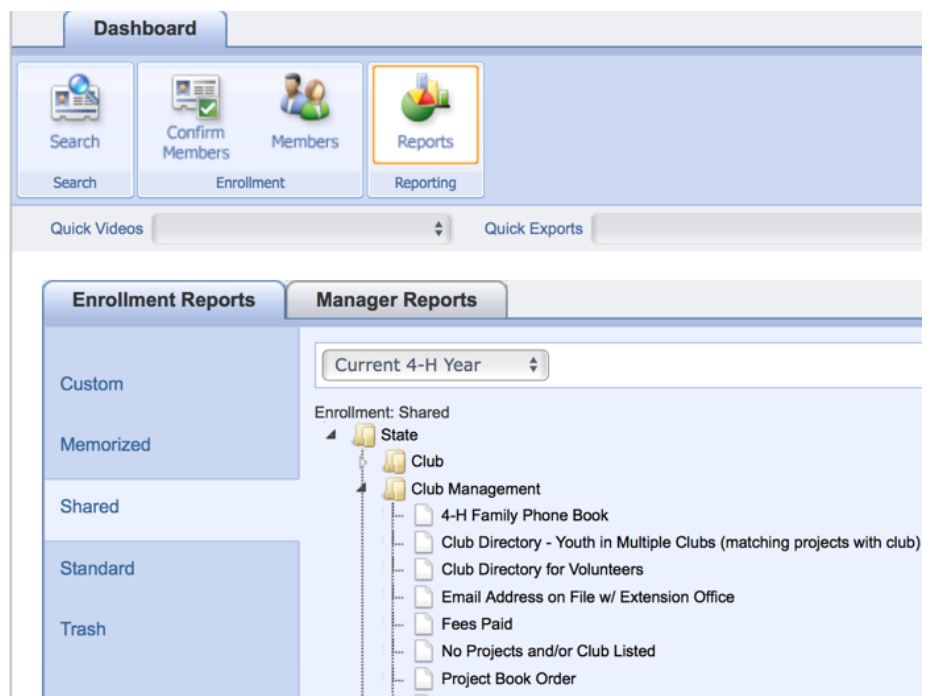


## Reports and Labels

You can view and print reports by clicking on the Reports icon, then selecting either **Shared** or **Standard**. Depending on county permissions, you may be able to create your own custom reports. If you are able to do that, please contact your county office for information about creating reports.

Locate the *Shared* report that you wish to view, highlight it, and then click **Run Report** on the list on the right. It will appear as a PDF, which you can save and print. Alternately, you can right-click on the name of the report, and choose **Run, Family Labels, Member Labels**, or **Export to Excel, Export to PDF**—and then print the file.

***\*\* In order to successfully print labels from PDF (Avery 5160 mailing labels), you must set your Adobe print options for scaling = none, or print size = actual size (depending on your version). Adobe WANTS to shrink the text to fit within bigger margins, which would mean your bottom 3 rows of labels would not be aligned correctly.***



Locate the *Standard* report that you wish to view, highlight it, and then click **Run Report** on the list on the right. It will appear as a PDF, which you can save and print. Alternately, you can right-click on the name of the report, and choose **Run**, **Export to Excel**, or **Export to PDF**—and then print the file.



Locate the report that you wish to view, highlight it, and then click **Run Report** on the list on the right. It will appear as a PDF, which you can save and print. Alternately, you can right-click on the name of the report, and choose **Run**, **Export to Excel**, or **Export to PDF**—and then print the file.

### Helpful Tips

Club leaders are not able to edit their own family data (any differently than other club members') while logged in to the club. To manage and edit your own family information, click the gold "Continue to Family" button on the second login screen.

For help with logging in as a club leader, or with other club leader options, please contact your county extension office.