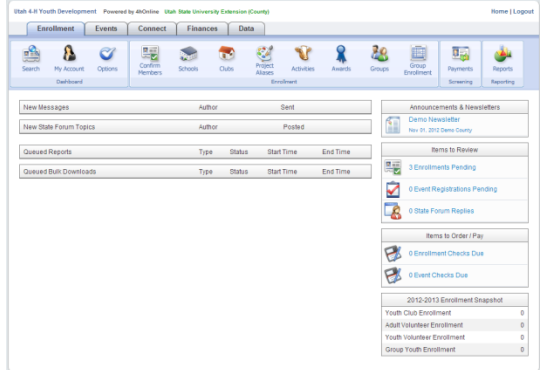
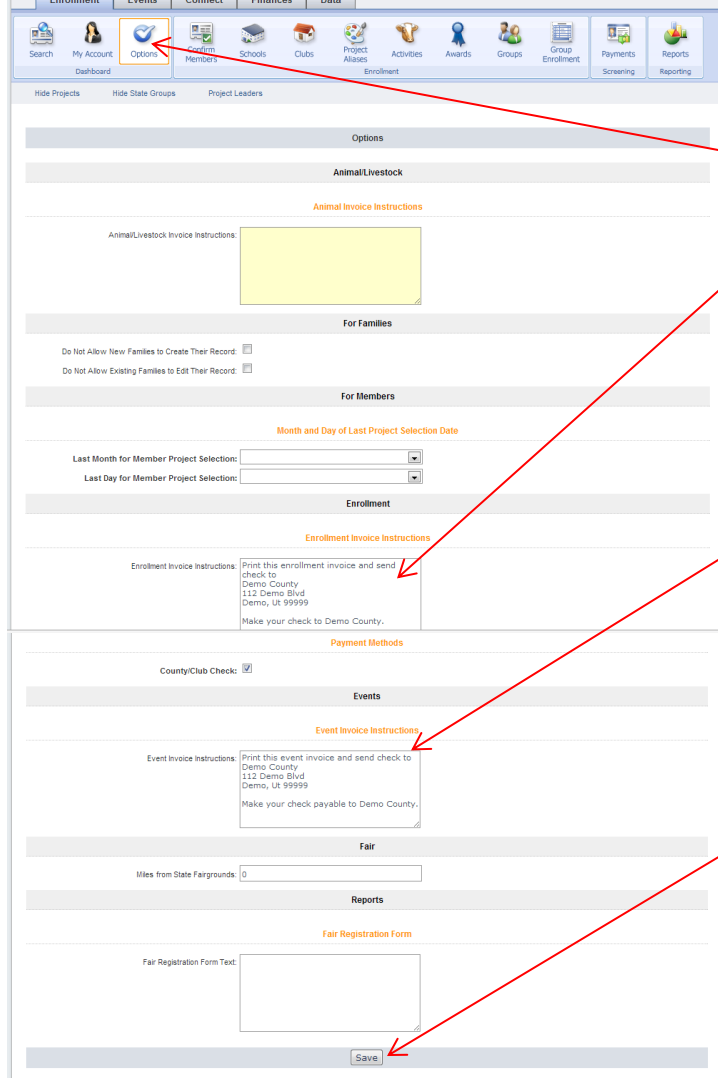
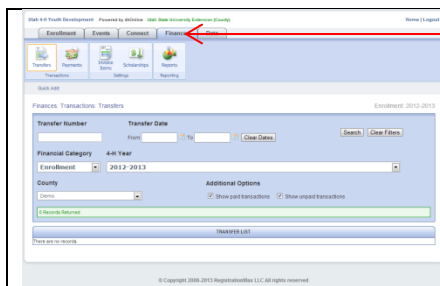
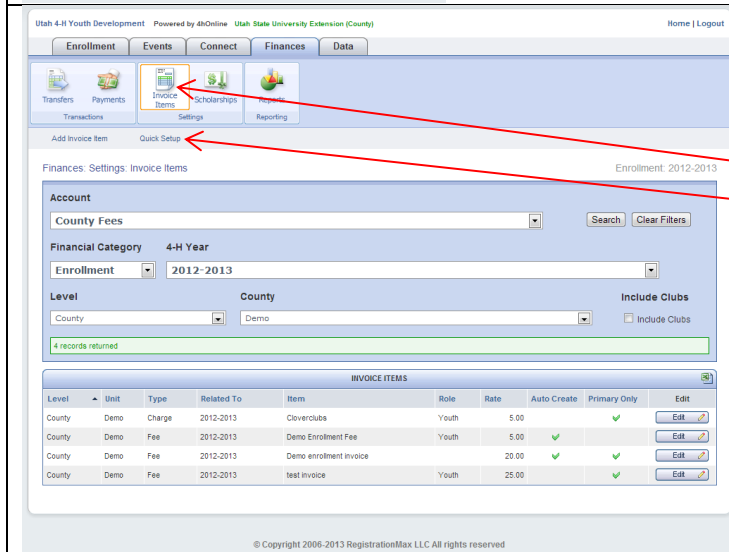


## Setting up County 4-H enrollment fees/discounts in ut4honline.

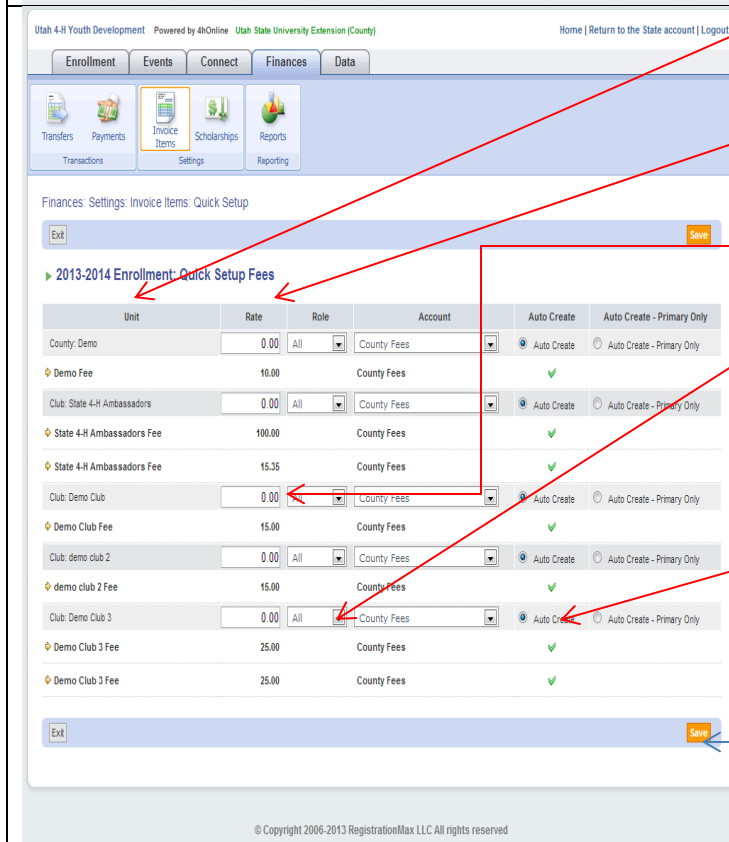
	<p><b>Each county should have only one manager create enrollment fees and or discounts.</b> (Although any 4H online county manager has the capability to create fees or discounts for invoices, if every county manager sets up an enrollment fee when they are logged into the system then enrollment fees created by each manager will show up on the members invoice.)</p>
	<p>First, you will set up your county specific invoice instructions that appear on each member's invoice.</p> <p>Log into 4h-online as a county manager.</p> <ol style="list-style-type: none"> <li>1. Click on the options icon.</li> <li>2. Enter your county specific instructions that become part of the invoice for Enrollment. This could be instructions to mail or bring their payments to your county 4H office with your address.</li> </ol> <p>and then</p> <ol style="list-style-type: none"> <li>3. Enter your county specific instructions that become part of the invoices for Event Registrations. (You can override these instructions when you set up an event registration.)</li> </ol> <p>If these instruction boxes are left blank the invoice instructions default to the following statement "Please send your payment to your county 4-H office with a copy of this invoice."</p> <ol style="list-style-type: none"> <li>4. Click the Save button.</li> </ol>



Click on the Finances tab.



- Method 1.**  
**Setting up Enrollment Fees.**
1. Click the "Invoice Item" icon.
  2. Click the Quick Setup link. This is a quick and easy way to set up enrollment fees. Quick Setup only works with "fees." You cannot set up discounts in Quick Setup.



3. Your county and all of your clubs will appear in the Unit column.
4. You can set the enrollment fee for your county 4H members in the Rate column.
5. If a club charges additional fees that your county office collects you would set the rates for that club.
6. In the Role column you set who the fees apply to: All (both adults and Youth), Youth, or Adults. (If you have different enrollment fees for adults and youth you will need to set up an invoice item for youth and a separate invoice item for adults.)
7. For county level enrollment fees always select the Auto Create button which means the item will automatically be added to the invoice of new member enrollments.
8. Press Save

Utah 4-H Youth Development Powered by 4HOnline Utah State University Extension (County) Home | Logout

Enrollment Events Connect Finances Data

Transfers Payments Invoice Items Scholarships Reports

Add Invoice Item Quick Setup

Finances: Settings: Invoice Items Enrollment: 2012-2013

Account: County Fees [Search] [Clear Filters]

Financial Category: 4-H Year

Enrollment: 2012-2013

Level: County

County: Demo

Include Clubs:

4 records returned

Unit	Type	Related To	Item	Role	Rate	Auto Create	Primary Only	Edit
County	Demo	Charge	2012-2013	Cloverclubs	Youth	5.00	<input checked="" type="checkbox"/>	[Edit]
County	Demo	Fee	2012-2013	Demo Enrollment Fee	Youth	5.00	<input checked="" type="checkbox"/>	[Edit]
County	Demo	Fee	2012-2013	Demo enrollment invoice		20.00	<input checked="" type="checkbox"/>	[Edit]
County	Demo	Fee	2012-2013	test invoice	Youth	25.00	<input checked="" type="checkbox"/>	[Edit]

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The invoice items created appear here. You can go in and edit any invoice item you created. **Invoice items created by other county managers can only be edited by the county manager that created the invoice item.**

Utah 4-H Youth Development Powered by 4HOnline Utah State University Extension (County) Home | Logout

Enrollment Events Connect Finances Data

Transfers Payments Invoice Items Scholarships Reports

Add Invoice Item Quick Setup

Finances: Settings: Invoice Items Enrollment: 2012-2013

Account: (All Accounts) [Search] [Clear Filters]

Financial Category: 4-H Year

Event Registrar: 2012-2013

Level: County

County: Demo

Include Clubs:

4 records returned

Unit	Type	Related To	Item	Role	Rate	Auto Create	Primary Only	Edit
Club	Demo Club	Charge	2012-2013	Cloverclub	Youth	2.00	<input checked="" type="checkbox"/>	[Edit]
Club	Demo Club	Fee	2012-2013	Demo enrollment invoice		10.00	<input checked="" type="checkbox"/>	[Edit]
County	Demo	Charge	2012-2013	Cloverclubs	Youth	5.00	<input checked="" type="checkbox"/>	[Edit]
County	Demo	Fee	2012-2013	Demo Enrollment Fee	Youth	5.00	<input checked="" type="checkbox"/>	[Edit]

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## Method 2.

### Setting up Enrollment Fees *and/or* Discounts.

**Fees** are added to invoices, for example your county 4-H enrollment fee.

**Discounts** are subtracted from invoices. This might include money given to your county to offset enrollment fees or perhaps you have a grant that can be used to cover some or all of particular 4-H members' enrollment fees (i.e. 4-H afterschool grants.)

Select the Add Invoice Item link.

Utah 4-H Youth Development Powered by 4HOnline Utah State University Extension (County) Home | Logout

Enrollment Events Connect Finances Data

Transfers Payments Invoice Items Scholarships Reports

Add Invoice Item Quick Setup

Finances: Settings: Invoice Items Enrollment: 2012-2013

Account: (All Accounts) [Search] [Clear Filters]

Financial Category: 4-H Year

Event Registrar: 2012-2013

Level: County

County: Demo

Include Clubs:

4 records returned

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1. Name the invoice item. For example "County 4-H Enrollment Fee" or "4-H Discount"
2. Select Enrollment for the *category*.
3. For *Type* select either "Discount" or "Fee" depending on the type of invoice item being created.
4. Select the members "role" for this invoice item. (**All** applies to all members, **Youth** applies only to youth members, and **Adult** applies only to adult members.)
5. Select the unit where this invoice item applies. The first unit in the dropdown is your county followed by your county's clubs.
6. Enter the default rate. For example 5.00 for five dollars. Do not enter \$ signs.
7. Check the Auto Create button if you want the item to be automatically added to the members enrollment invoice. Use this for fees. Leave this unchecked if you are creating a discount item.
8. Enter the Auto create start and end dates. When a member enrollment occurs within this date range the invoice item will automatically be added to their enrollment invoice. You may want to use 10/01/2012 as the start date and 09/30/2013 for the end date.

Utah 4-H Youth Development Powered by 4HOnline Utah State University Extension (County) Home | Return to the Admin account | Logout

Enrollment Events Connect Finances Data

Transfers Payments **Invoice Items** Scholarships Reports

Transactions Settings Reporting

Add Invoice Item Quick Setup

Finances: Settings: Invoice Items Enrollment: 2012-2013

Account

County Fees  Search Clear Filters

Financial Category 4-H Year

Enrollment 2012-2013

Level County Include Clubs

County Demo  Include Clubs

4 records returned

Level	Unit	Type	Related To	Item	Role	Rate	Auto Create	Primary Only	Edit
County	Demo	Charge	2012-2013	Coverclubs	Youth	5.00			Edit
County	Demo	Discount	2012-2013	4-H Discount	Youth	5.00			Edit
County	Demo	Fee	2012-2013	Demo County 4-H Enrollment Fee	Youth	5.00	✓		Edit
County	Demo	Fee	2012-2013	Demo Enrollment Fee	Youth	5.00	✓		Edit

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The invoice items created appear here. You can go in and edit any invoice item you created. **Invoice items created by other county managers can only be edited by the county manager that created the invoice item.**