4HOnline

4HOnline Club Leader / Manager User Guide for Club Leaders

Created: 2018

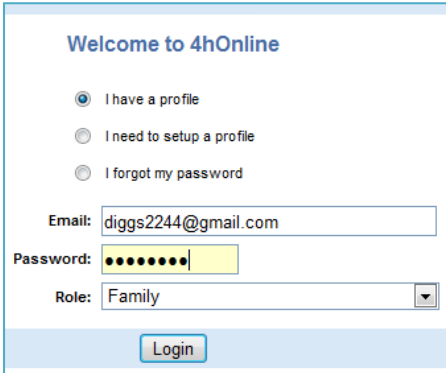## OVERVIEW AND INITIAL ACCESS

4HOnline offers two levels of access to adults. First, all adult family members have access to their family's enrollment data. Secondly, for those adults with designated leader roles, it is possible to grant "Club Manager" and/or "Project Leader" access, which provides greater access to member enrollment data.

To access 4HOnline as a Club Manager, you must:

- Be enrolled as a screened adult volunteer in 4HOnline.
- Know the email address used by your family to enroll in 4HOnline.
- Know (or request from 4HOnline) your family login password.
- Be granted Club Manger access by Extension staff.
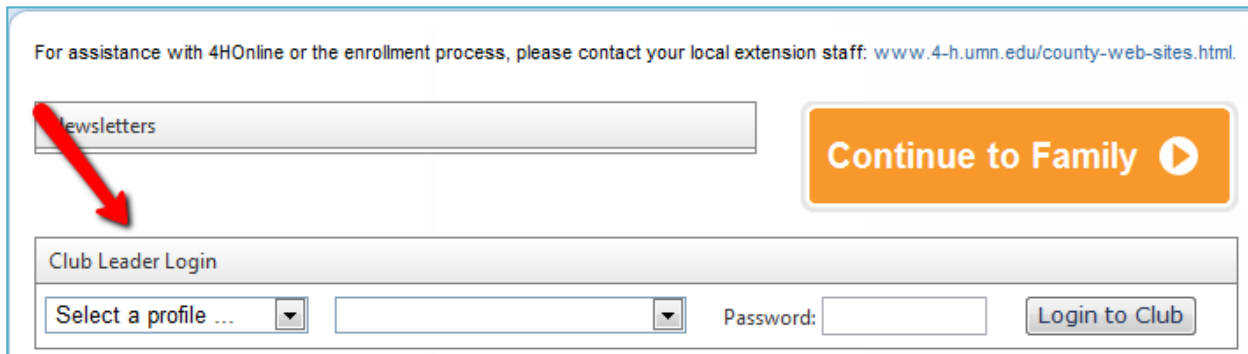- Be provided with the club password by Extension staff.

To log on to 4HOnline:

1. Go to http://nc.4honline.com
   (notice that there is no "www" in that address).

2. Enter your family email address and password.

Once granted Club Manager access, you will see the [Club Manager] toolbar after you login to 4HOnline:

- Clicking on [Continue to Family] will bring you to your regular data access screens.
- Under [Club Leader Login], choose your name under [Select a profile], then your club.
- The club [Password] will be provided by your Extension staff.

After clicking on [Login to Club], you will see the Club Manager dashboard, and by default, you will be looking at the [Confirm Members] screen.

**Note that "Members" refers to family members, who may be Youth or Adult "Members".**

Confirm Members
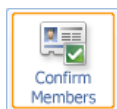
 [Confirm Members] lists all pending youth and adult members for your club. In other words, these are people who have applied online, but have not yet been approved by Extension staff. As a Club Manager, you may be interested in following up with these families in some way.

In addition to allowing you to review their submitted enrollment data, this screen allows you to "Confirm" their enrollment, but their enrollment must still be ultimately accepted (confirmed) by Extension staff.

Members
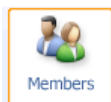
[Members] gives you access to a listing of your club members, where you can access each individual member (both youth and adult members). Clicking on the [Edit] button next to each listed member will then display the details of their enrollment (you won't actually be able to edit their enrollment data).

- To return from viewing a member's details, either click the [Close] button at the bottom of the screen, or click on one of the dashboard icons (Members, Search, etc.).

- Clicking on [Return to the Family Account] will log you out of your Club Manager access.

Search

[Search] allows you to search for or apply various filters to a listings of your club members. This can be helpful when looking for a specific member (or group of members) and it also the quickest way to use the [Quick Exports] option (info below) to print a list of the listed members or to send an email (instructions for that are below.)

- In the [Keyword…] field, you can search by any field (phone number, e-mail, name, etc.) but it is a "literal" search. If you enter "john", you'll get John Smith and Sally Johnson and Dwight Marks who lives at 2345 Johns Road SE, but NOT Jon Allen.

- You can also use any of the checkbox "groups" to filter the displayed results.

- If you do not select any of the checkboxes **in a group** (as indicated by the red boxes in the screenshot at right) 4HOnline will not apply that filter, or criteria at all.

- Searches are remembered from your previous session, so if you are not seeing the expected listing, check the search/filter settings. To list all members, leave the [Keyword] field blank and do not check ANY checkboxes, then click [Search]

- Click on [Quick Exports] menu to print a simple contact list for the club members currently being displayed.

EMAILING MEMBERS

4HOnline does not allow club leaders to send emails directly from within 4HOnline. Instead, it will provide a "live" updated list of email addresses, with duplicates removed, based on filter criteria and/or flagging that you do.

To get started

- Click on the [Search] icon.

- Apply filters as desired (see section above).

- Click [Email List] to get a copy-paste-able list of email addresses that can be used in the **BCC (Blind Carbon Copy) field** of your personal email client.

If you desire to email a more "select" group of members, do the following.

- Click [Flag Options], then [Clear All Flags] (this removes any potentially hidden flags).

- Then, using the check boxes to the left of each member's name, click the check box(es) for those you'd like to send an email to.

- Using the [Flagged] filter, [Search] for (list) those members you just flagged in the previous step.
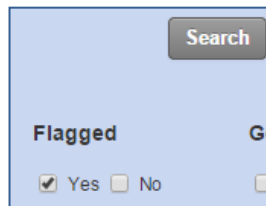
You should now only see flagged members.

- Click [Email List] to get a copy-paste-able list of email addresses that can be used in the same way as above – in the **BCC (Blind Carbon Copy) field** of your personal email client.