

Pulling Financial Reports in Youth Online

- Log in to Youth Online using your credentials.
- Click on the “Reports” tab towards the top of your portal screen.



- In the drop down, you will see several different reports used to conduct membership processing business.
- The two reports involving financials are:
 - League Financial
 - Payment Receipts

League Financial Report:

- The League Financial report will provide you with the financial information for a single, specific league. Information in this report includes:
 - Application #
 - League Name
 - Start & End Dates
 - Number of Bowlers
 - Bowler Name, ID, Age, Phone, Membership Products (from that league) and dues associated with those products
 - Approval Date the products were purchased
- To pull the League Financial report, go to the “Reports” drop down menu, select “League Financial”.
- This should bring you to the League Financial homepage. On this page, you will see two drop down menus; one for the season and one for the league.

A screenshot of the League Financial Report form. The form has a light blue background. At the top, it says 'League Financial Report' in red. Below that, there are two dropdown menus. The first is labeled 'Season' and has '2017-18 WINTER' selected. The second is labeled 'League' and has 'SELECT LEAGUE' selected. Both dropdown menus are enclosed in a red rectangular box.

- Select the desired Season, then select the desired League associated with the previously selected Season.

League Financial Report

| | |
|------------------|---|
| Season | League |
| 2017-18 WINTER ▼ | 288401 - SPECIAL OLYMPICS MEMBERSHIP 8/1/ ▼ |

- Once the desired league is selected, the requested report will populate.

League Financial Report

| | |
|------------------|---|
| Season | League |
| 2017-18 WINTER ▼ | 288401 - SPECIAL OLYMPICS MEMBERSHIP 8/1/ ▼ |

Application #: 288401
League Name: Special Olympics Membership
Start/End Dates: 08/01/17 - 07/31/18
Processor Name: IBC Youth HQ
Processor Phone: 817/385-8426
Number of Bowlers: 32

| Name ↕ | Age* ↕ | Member ID ↕ | Phone | Membership Type ↕ | Dues | Paid | Approval Date ↕ |
|--------|--------|-------------|-------|-------------------|------|------|-----------------|
|--------|--------|-------------|-------|-------------------|------|------|-----------------|

- You can either print the report directly, or you can export to Excel to use the data as needed.

| | |
|--------------|--------------|
| Print | Excel |
|--------------|--------------|

Payment Receipts Report:

- The Payment Receipts report will provide you with the financial information for all leagues for the selected time period. Information in this report includes:
 - Time Period
 - Number of Leagues
 - Bowler Name, ID, Age, Phone, Membership Products, League Name and paid dues associated with those products
 - Approval Date the products were purchased
- To pull the Payment Receipts report, go to the “Reports” drop down menu, select “Payment Receipts”.
- This should bring you to the Payment Receipts homepage. On this page you will see two search fields, one for the start date and one for the end date.

Payment Receipts for All Leagues for a Time Period

| | | | | |
|------------|---|----------|---|---|
| Start Date | <input type="text" value="07/01/2018"/> | End Date | <input type="text" value="09/30/2018"/> | <input type="button" value="Generate"/> |
|------------|---|----------|---|---|

- Once you have entered the desired start date and end date, hit the “Generate” button to the right of the search fields.
- After clicking “Generate”, the report should populate below.

Payment Receipts for All Leagues for a Time Period

| | | | | | |
|------------|---|----------|---|---|---------------------------------------|
| Start Date | <input type="text" value="07/01/2018"/> | End Date | <input type="text" value="09/30/2018"/> | <input type="button" value="Generate"/> | <input type="checkbox"/> Refunds Only |
|------------|---|----------|---|---|---------------------------------------|

Time Period: 07/01/2018 - 09/30/2018
Processor Name: IBC Youth HQ
Processor Phone: 817/385-8426
Number of Leagues: 1

| Transaction ID ↕ | Name ↕ | Age* ↕ | Member ID ↕ | Membership Type ↕ | League Name ↕ | Paid | Approval Date ↕ |
|------------------|--------|--------|-------------|-------------------|---------------|------|-----------------|
|------------------|--------|--------|-------------|-------------------|---------------|------|-----------------|

- You can either print the report directly, or you can export to Excel to use the data as needed.

| | |
|--------------------------------------|--------------------------------------|
| <input type="button" value="Print"/> | <input type="button" value="Excel"/> |
|--------------------------------------|--------------------------------------|