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.



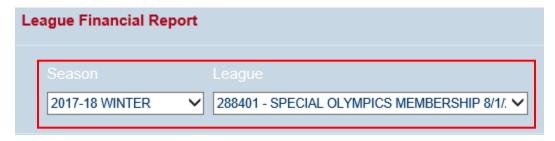
- In the drop down, you will see several different reports used to conduct membership processing business.
- The two reports involving financials are:
 - League Financial
 - Payment Receipts

League Financial Report:

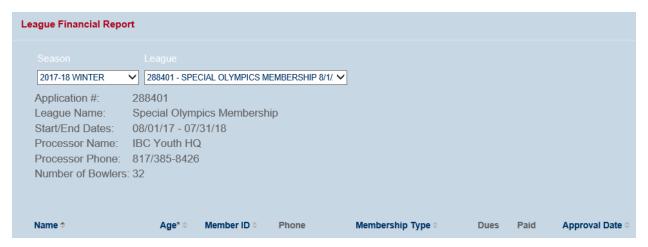
- The League Financial report will provide you with the financial information for a single, specific league. Information in this report includes:
 - Application #
 - o League Name
 - Start & End Dates
 - Number of Bowlers
 - Bowler Name, ID, Age, Phone, Membership Products (from that league) and dues associated with those products
 - o 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.



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



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



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



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.



- 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.



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

