RECORDBOOK

Club Leader Help File

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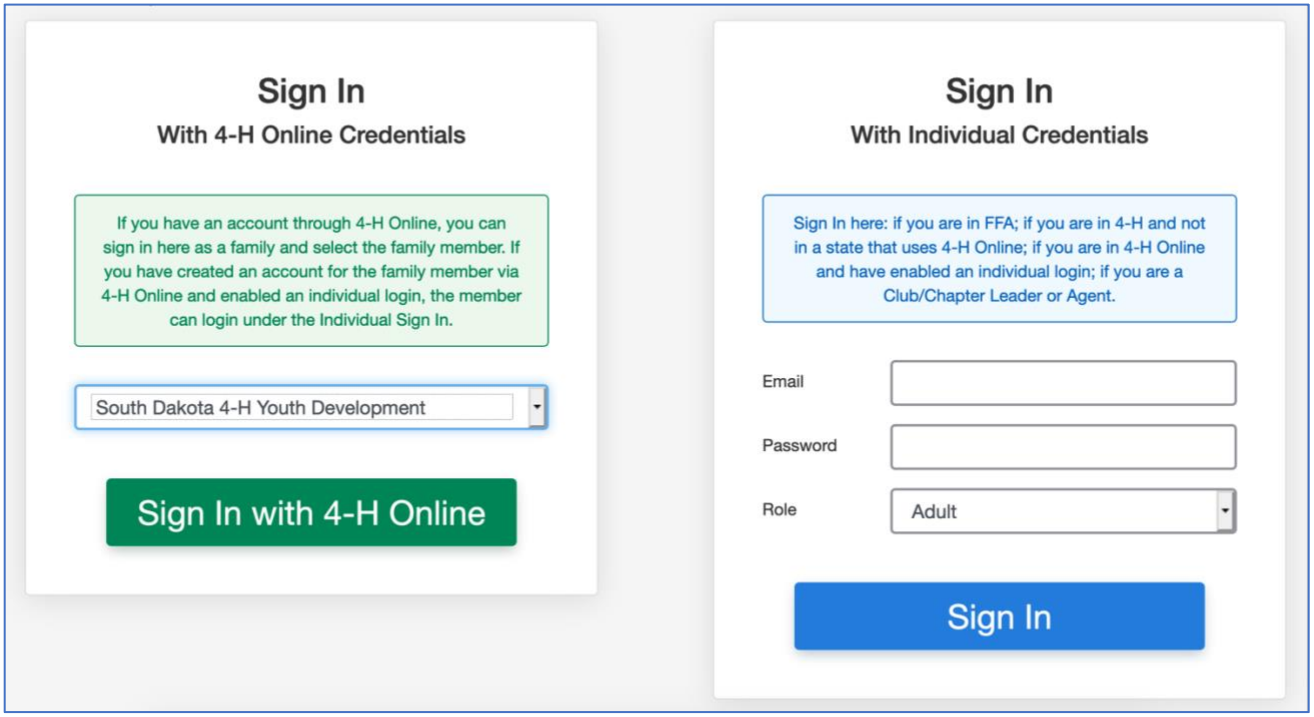
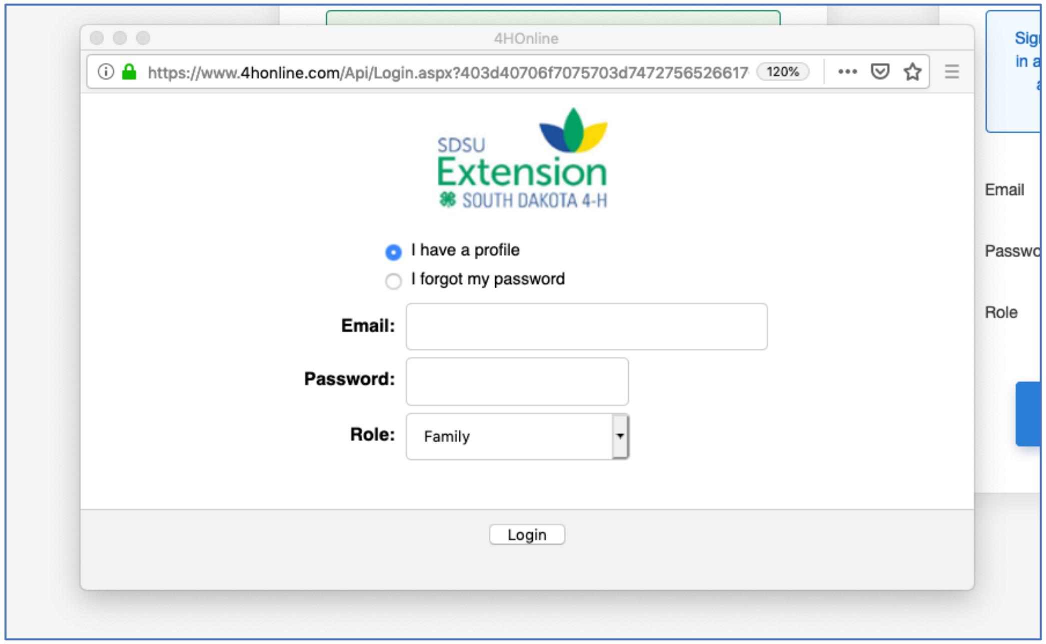
How to Log-In to Your Account (4-H Online)



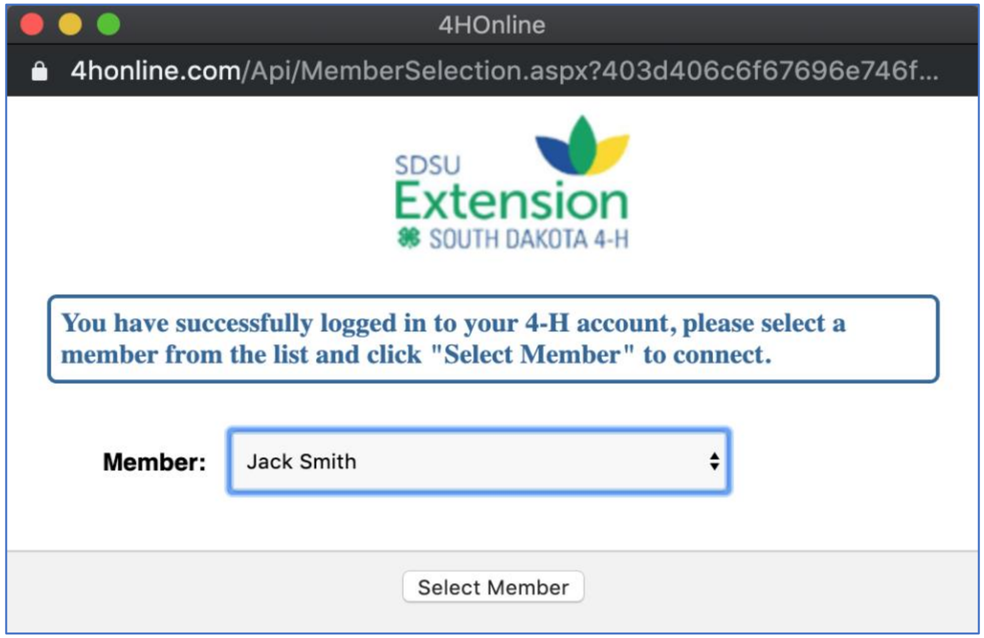
Go to http://recordbookapp.com.
Click “Get Started.”
Select your State 4-H department.
Click the GREEN button to “Sign-in with 4-H Online.”



Enter your 4-H Online email address and password.
Select the “Family” Role.

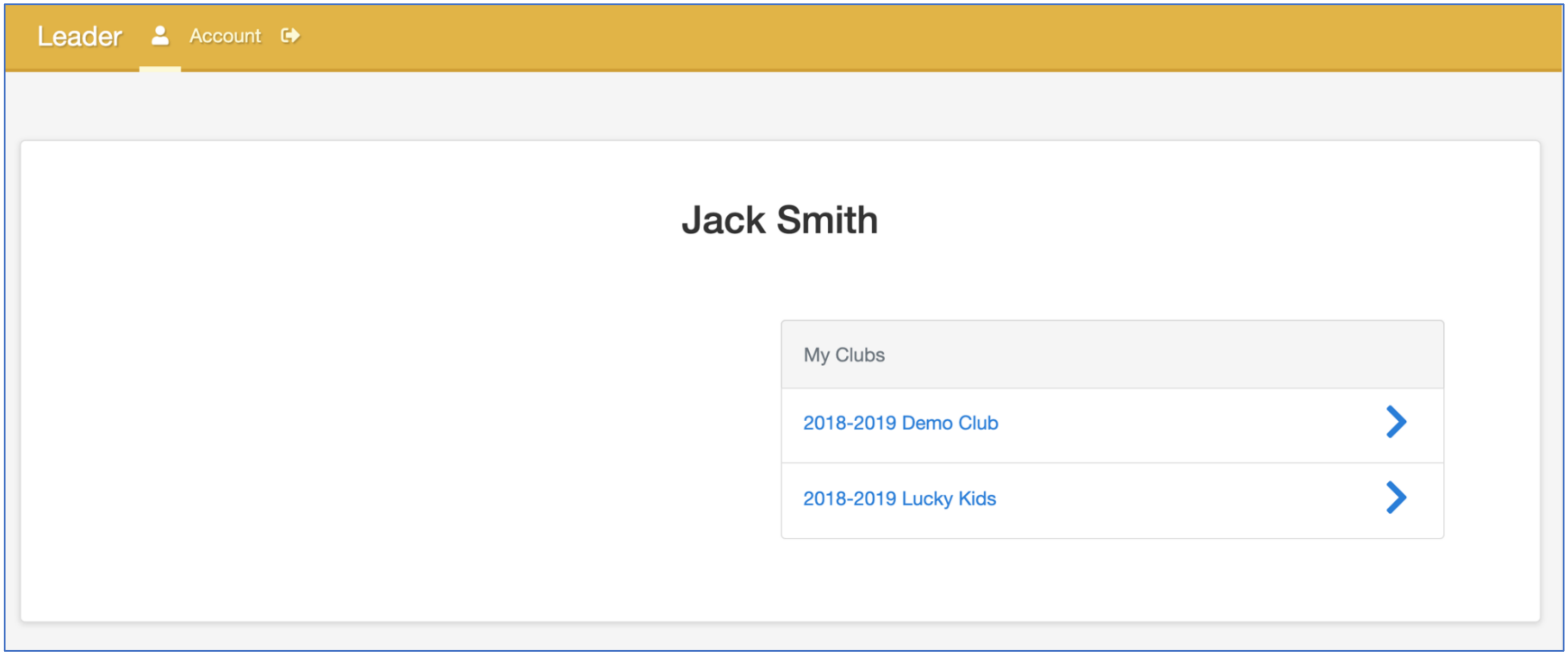
*If you have forgotten your 4-H Online password:

1. Select “I forgot my password”. You will receive an email with a temporary password.
2. Go to your state’s 4-H Online sign-in page (http://___[your state].4honline.com)
3. Use the temporary password you received to log in to your 4-H Online account.
4. You will be prompted to set a new password.
5. Set a new password
6. Go to http://recordbookapp.com.
7. Select your State 4-H Program and click to sign-in with 4-H Online.
8. Enter your email address and the new password that you have set.



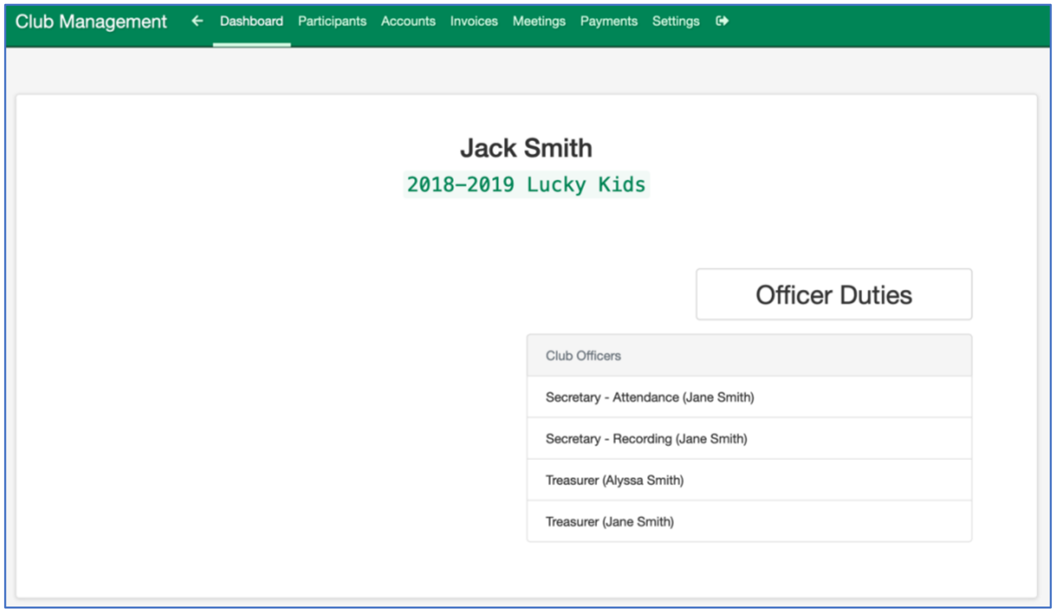
Select an Adult member who has been assigned Club Leader Login permissions.

**In order to access your Club Leader account in RecordbookApp.com, you will need Club Leader Login Permission in 4-H Online. If you are unable to log in to your account, contact your County 4-H Office to request the appropriate permissions in 4-H Online.



Select the Club that you would like to manage.

How to Access the Member Club Management View

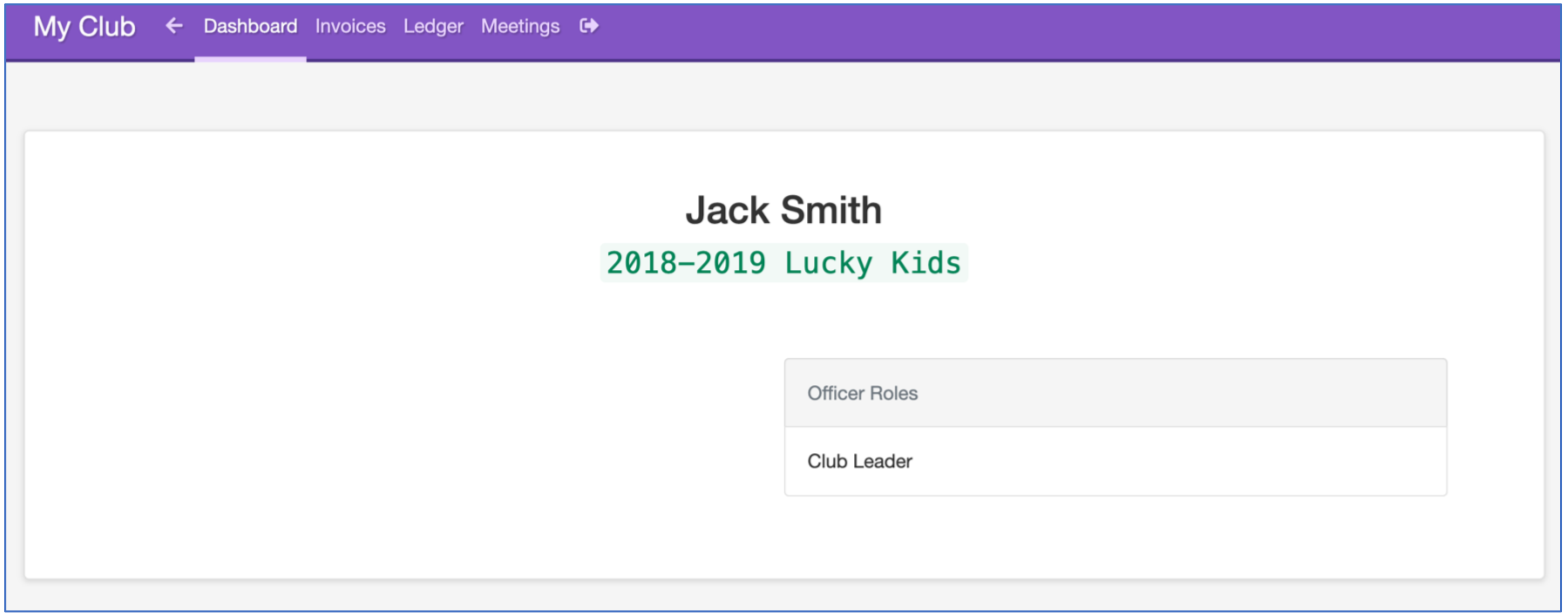


Click on the "Dashboard" tab.
Click on "Officer Duties" to access the Member Club Management (My Club) view.

This is the view that your Club Members will see when they log in to their Club account.

- All Members will see an Invoice tab so they may pay any fees due to the Club.
- The Ledger tab will only appear for members who have been assigned the Treasurer Role
- The Meetings tab will only appear for members who have been assigned a Secretary Role.

As a Club Leader, you have been assigned all Club Officer Roles and will see all possible tabs.



From the “My Club” view you may:

- View invoices that you need to pay.
- View/Edit the Club Ledger on behalf of the Club Treasurer.
- View Meetings.
- Add Attendance and Minutes to existing Meetings on behalf of the Club Secretary.

View My Invoices in My Club

My Club ← Dashboard Invoices Ledger Meetings

Jack Smith

2018-2019 Lucky Kids

My Invoices

Invoices - Requiring Payment

Invoice Date	Invoice Number	Invoice Description	Invoice Amount	Invoice Paid	Invoice Balance
Sep 20, 2019	22	2018-2019 Lucky Kids	20.00	0.00	20.00

Invoices - Paid

Invoice Date	Invoice Number	Invoice Description	Invoice Amount	Invoice Paid	Invoice Balance
Sep 01, 2019	17	2018-2019 Lucky Kids	10.00	10.00	0.00

Click on an individual invoice to view the invoice details.
Click on the invoice requiring payment to pay the invoice.

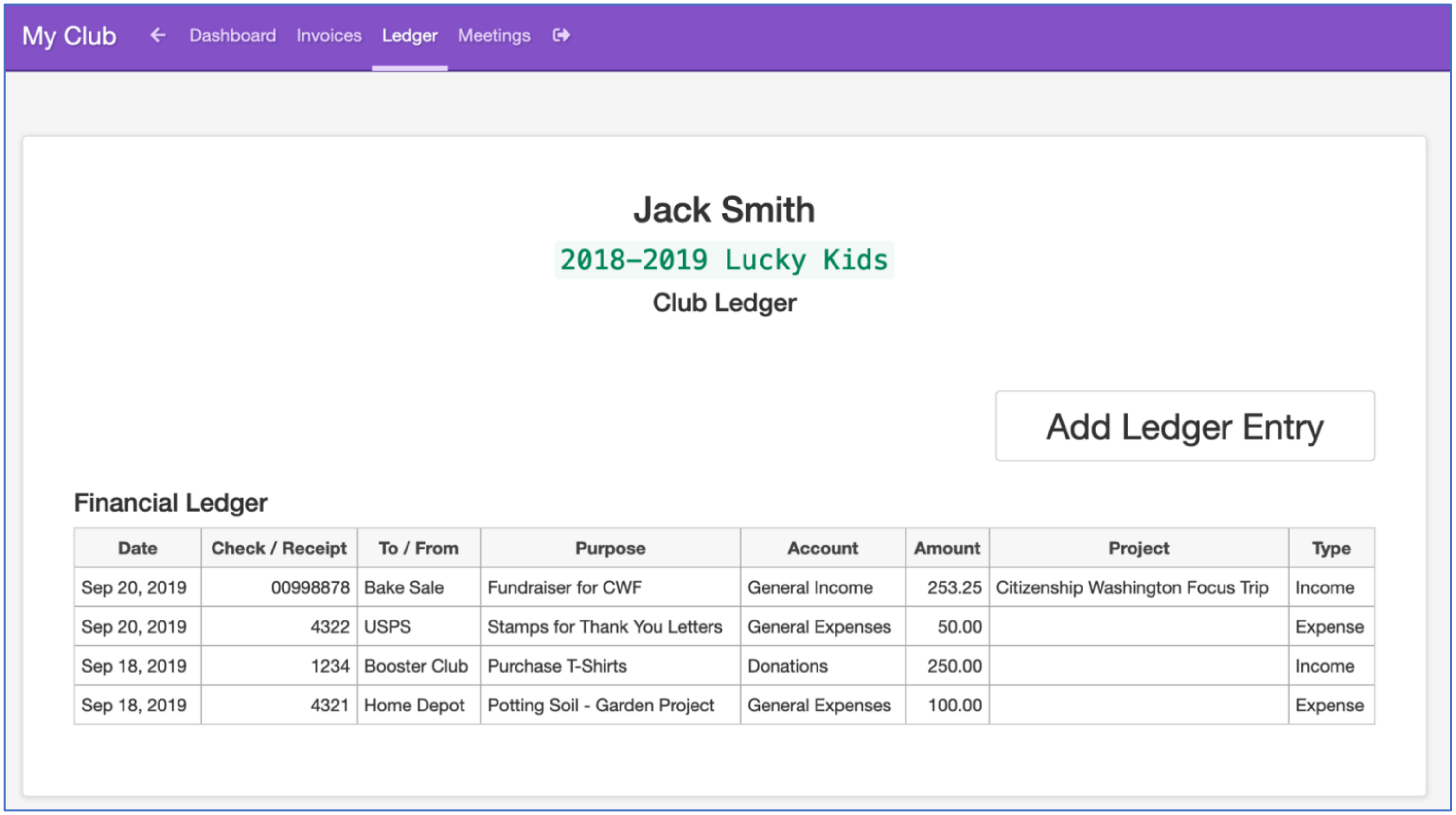
View/Manage Youth Club Officer Duties

Club Officers have permissions for the following areas:

- **Treasurer**: Enter Club Income and Club Expenses in the Club Ledger
- **Secretary – Attendance:** Record Club Meeting Attendance
- **Secretary – Recording**: Record Club Meeting Minutes

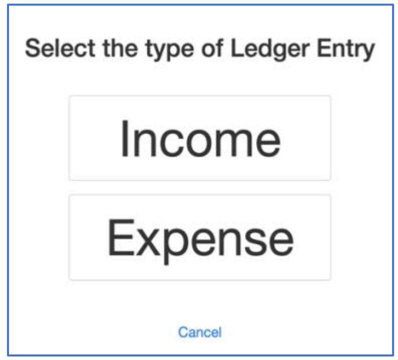
Additional Roles and Permission levels will be added in the future.

Club Treasurer: Manage the Ledger (Income and Expenses)

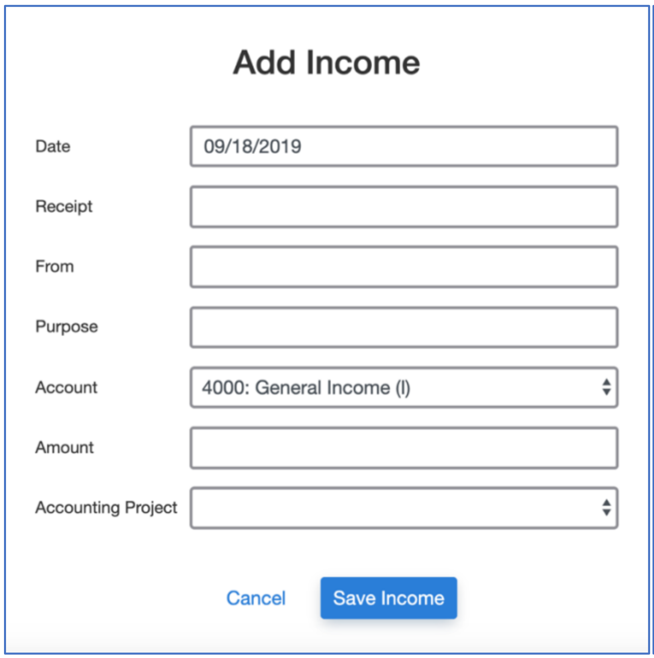


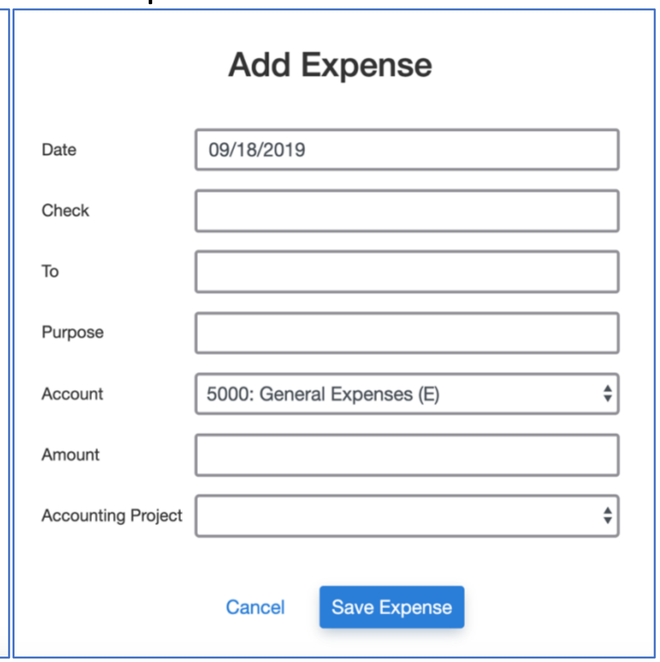
Date	Check / Receipt	To / From	Purpose	Account	Amount	Project	Type
Sep 20, 2019	00998878	Bake Sale	Fundraiser for CWF	General Income	253.25	Citizenship Washington Focus Trip	Income
Sep 20, 2019	4322	USPS	Stamps for Thank You Letters	General Expenses	50.00		Expense
Sep 18, 2019	1234	Booster Club	Purchase T-Shirts	Donations	250.00		Income
Sep 18, 2019	4321	Home Depot	Potting Soil - Garden Project	General Expenses	100.00		Expense

Click on the Ledger tab on the Menu.
Click on an existing ledger item to edit it.
Click on the “Add Ledger Entry” button to add new items.



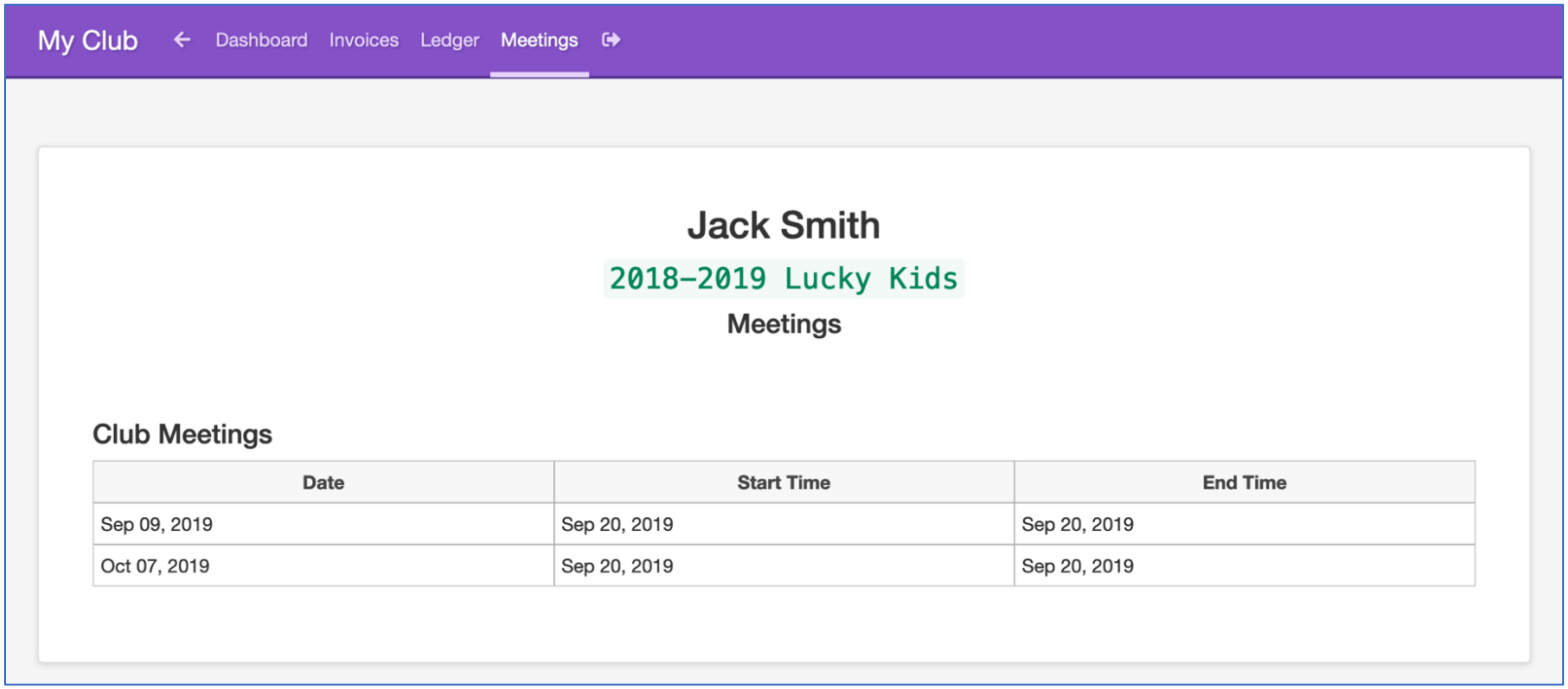
Select “Income” or “Expense”





Complete the information about the Income or Expense.
Click to Save the Income or Expense entry.

Secretary – Attendance & Recording: View and Edit Meetings in My Club



Click on the "Meetings" tab on the My Club Menu.
Click on the meeting for which you would like to enter Attendance and/or Meeting Minutes.

To Add Meeting Attendance for My Club

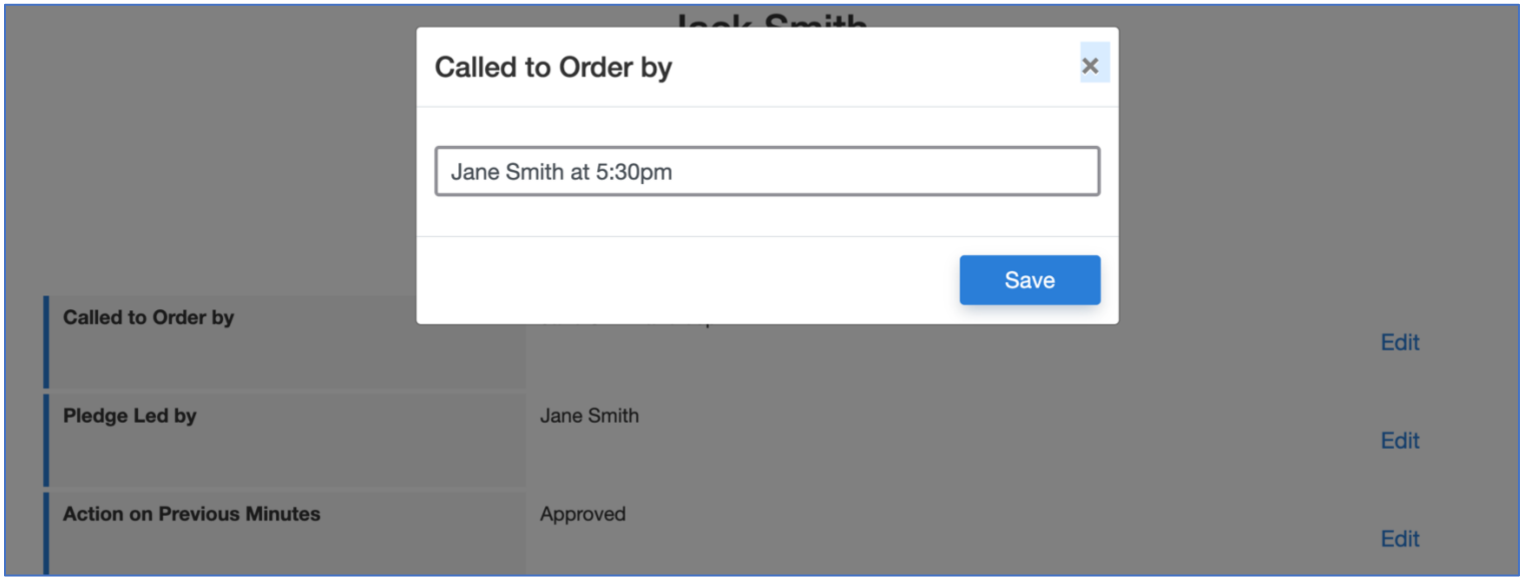
Click the Attendance button.

Click on the grey checkmark to mark each member present (grey = absent, green = present).
Once you have completed the attendance click “Go back to Meeting.”
You may edit attendance by clicking on the “Attendance” button again.

To Add Meeting Minutes for My Club

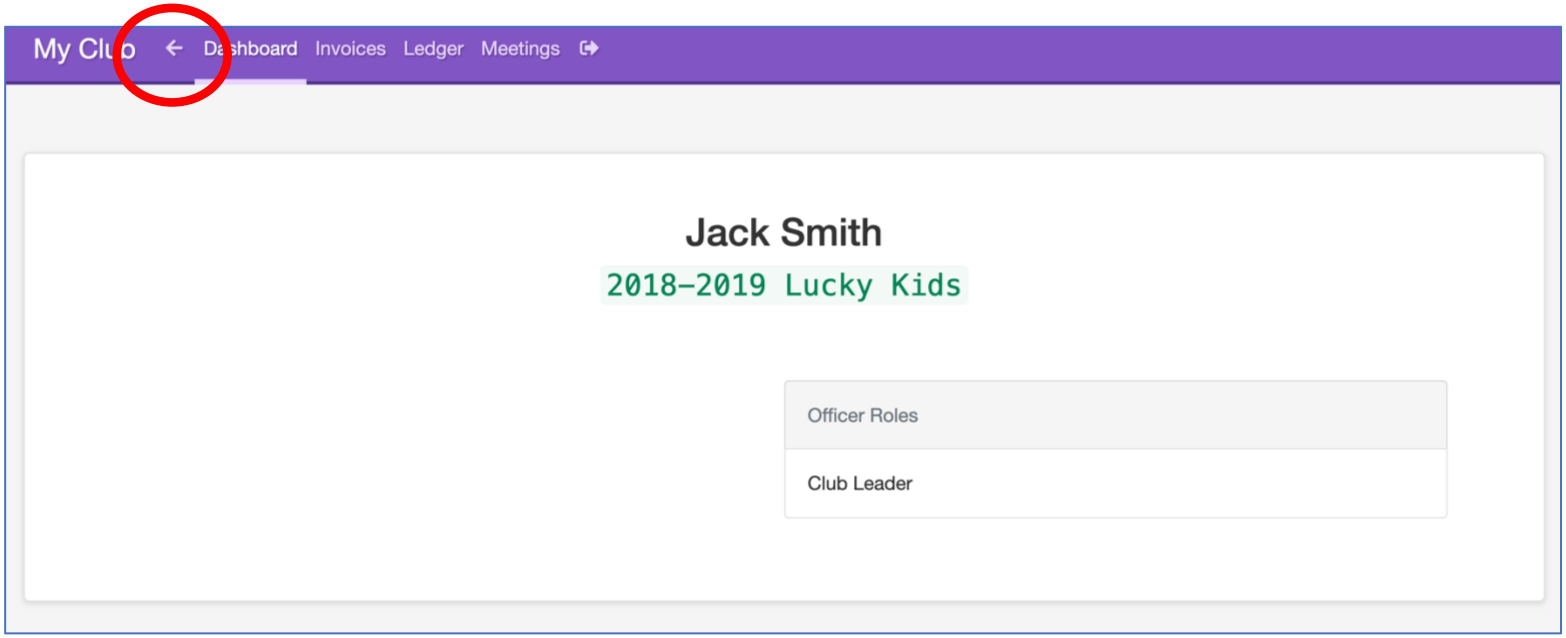
Click the Meeting Minutes button.

Click "Edit" to record meeting information in each section.



After all of the sections are completed, click "Go Back to Meeting" to save the full minutes.

How to Return to the Club Leader View

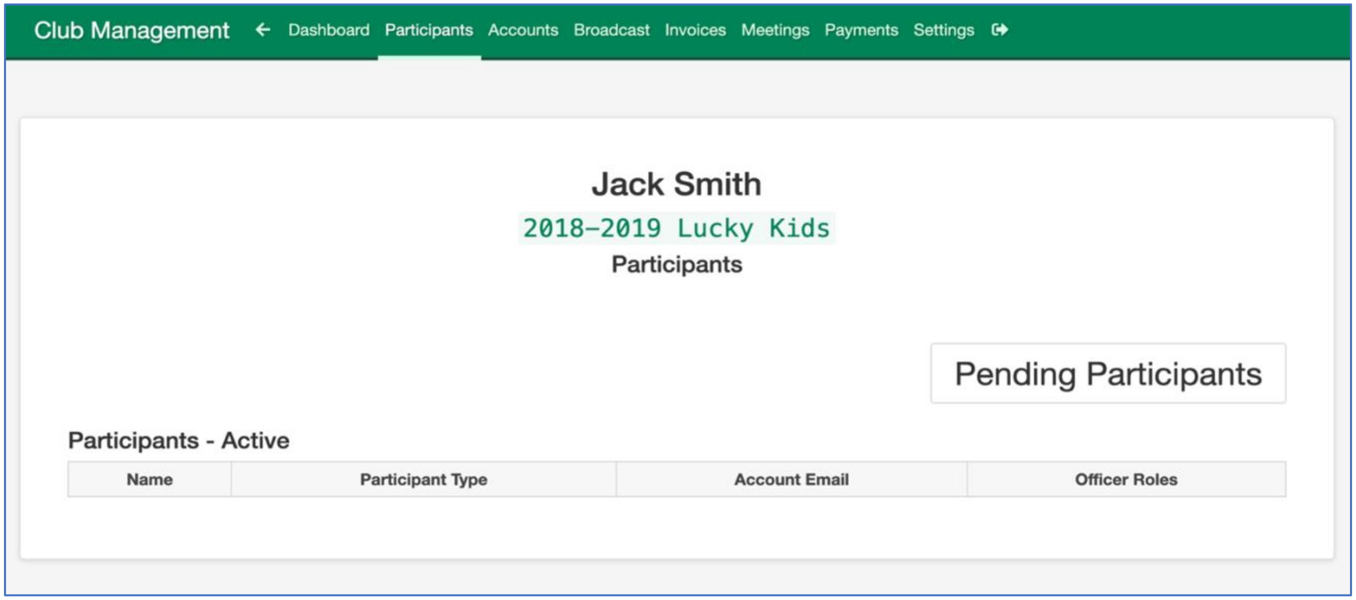


Click the arrow on the dashboard to return to the Club Leader account.

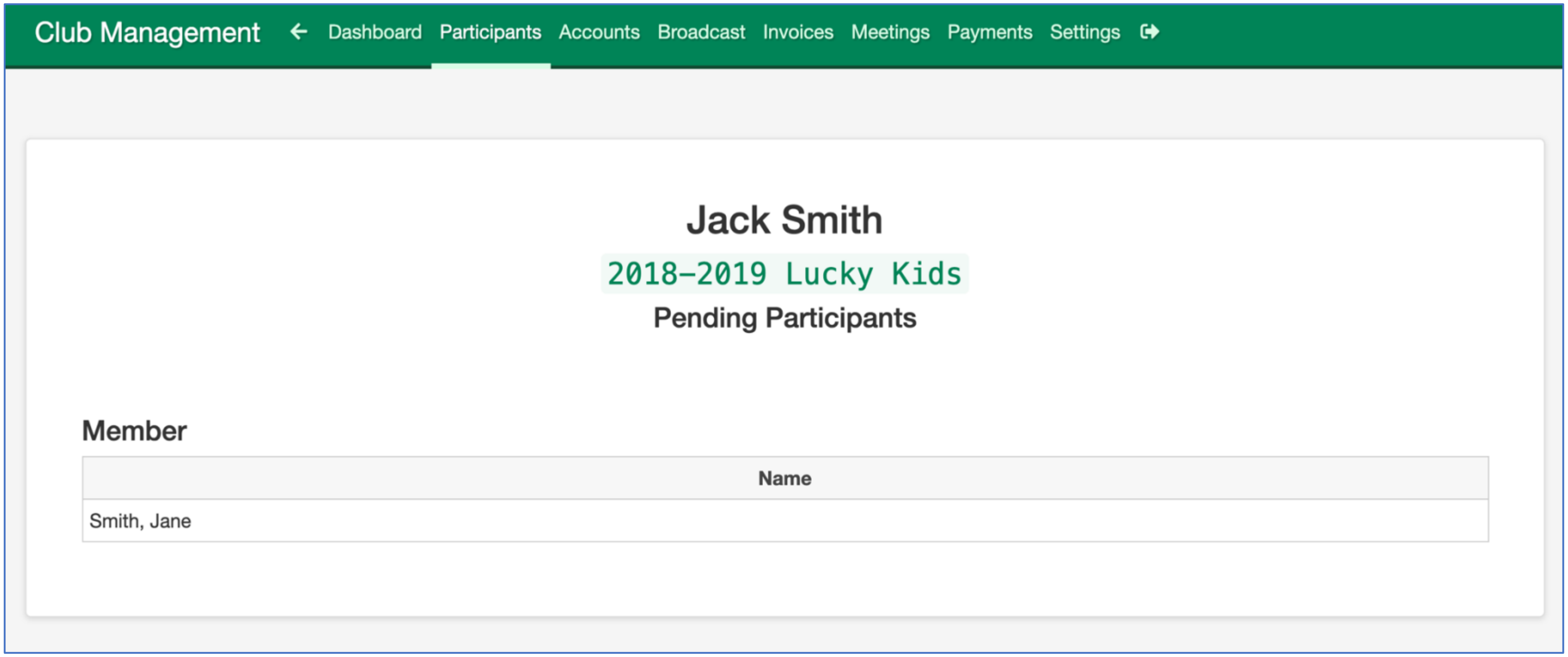
How to Manage Participants

Managing participants includes approving members for Club Management and assigning Officer Roles.

How to Approve Participants

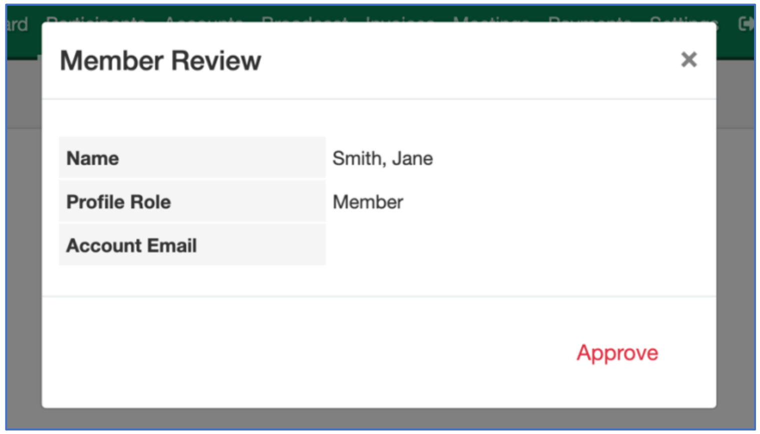


Click “Participants” tab on Dashboard.
Click on the “Pending Participants” tab.

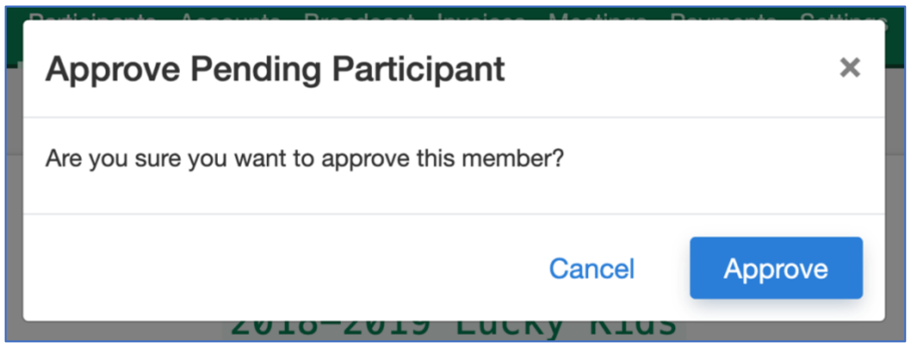


Click on the pending participant's name.

*NOTE: only club members who have logged in to Recordbookapp.com and have created a profile will appear on the list of pending members. If they have only completed their 4-H Online enrollment and have not logged in to Recordbookapp.com with their 4-H Online login, they will not appear in this list. The pending status is related to the Club Management account status and is NOT related to the enrollment status.



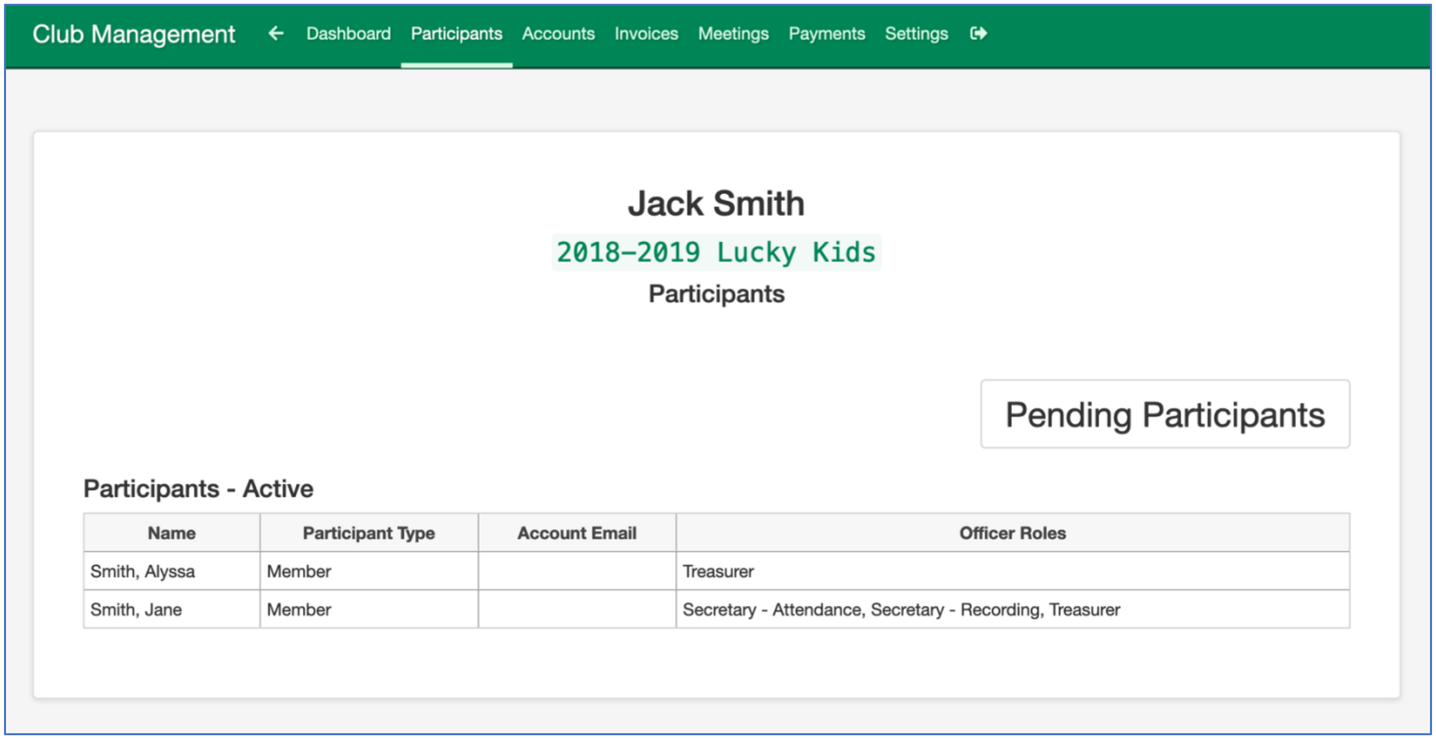
Click on "Approve" to approve Club Management participation.



Verify and click "Approve" button.
Member will now appear in "Participants-Active" list.

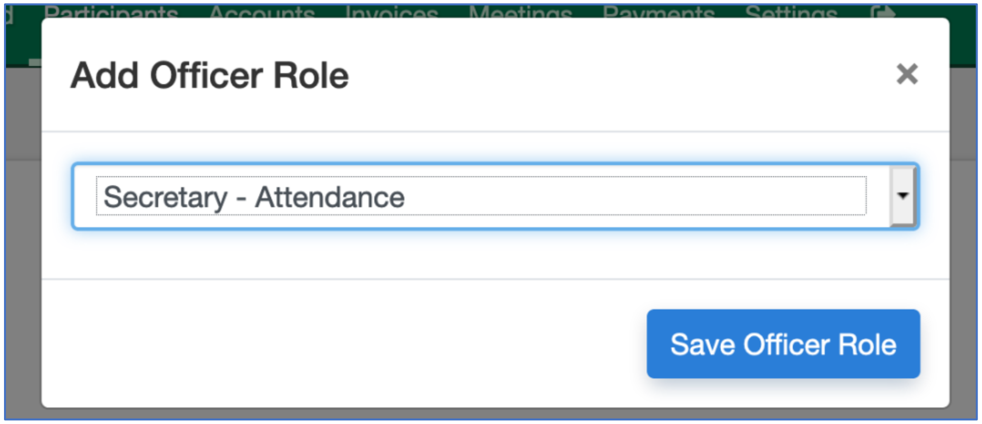
*NOTE: This approval is NOT connected to and does not impact the member's 4-H enrollment status.

How to Add Officer Roles



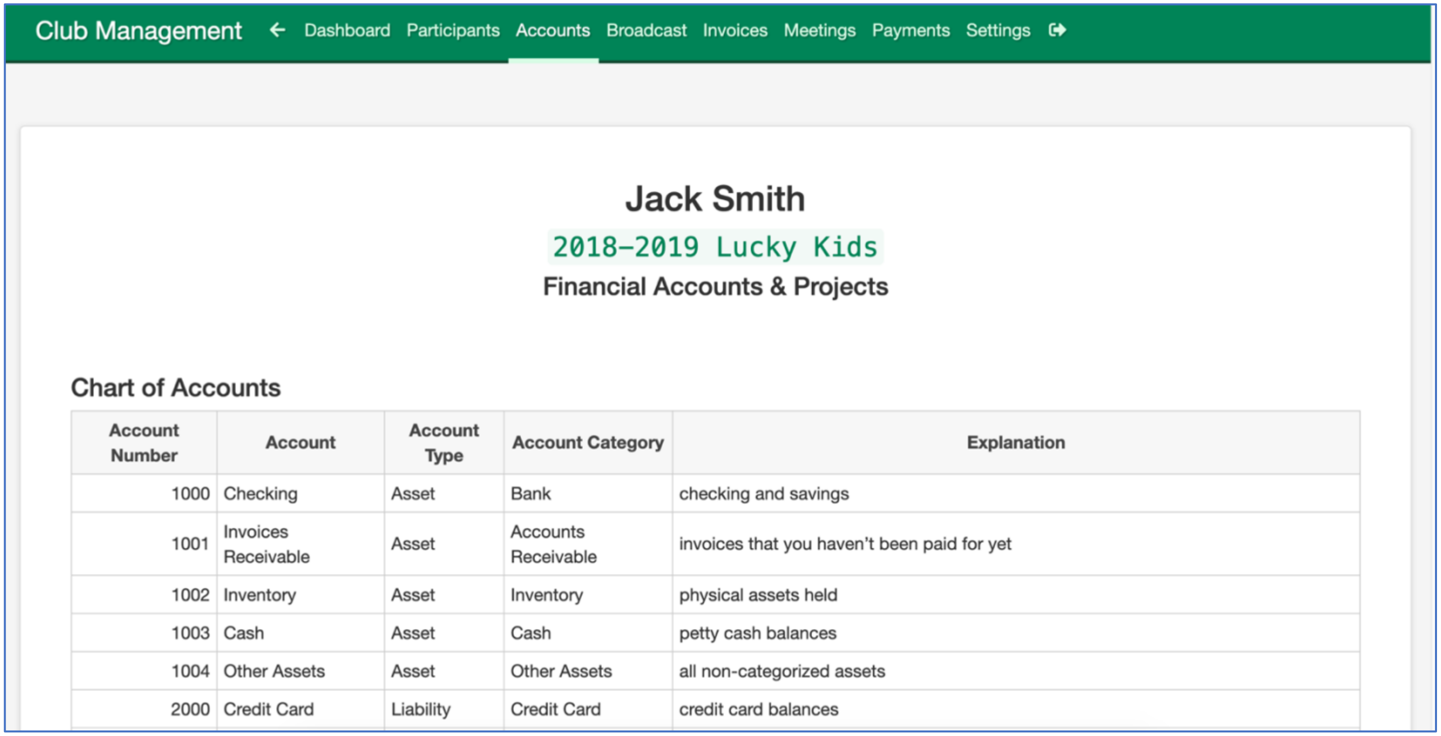
Click on the "Participants" tab.
Click on the Member to whom you wish to assign an Officer Role.

Click “Add Officer Role” button.



Select an Officer Role from the drop-down list.
Click on “Save Officer Role.”
You may repeat this process to assign more than one Officer Role to each participant.

How to Manage Financial Accounts



Club Management ← Dashboard Participants Accounts Broadcast Invoices Meetings Payments Settings

Jack Smith

2018–2019 Lucky Kids

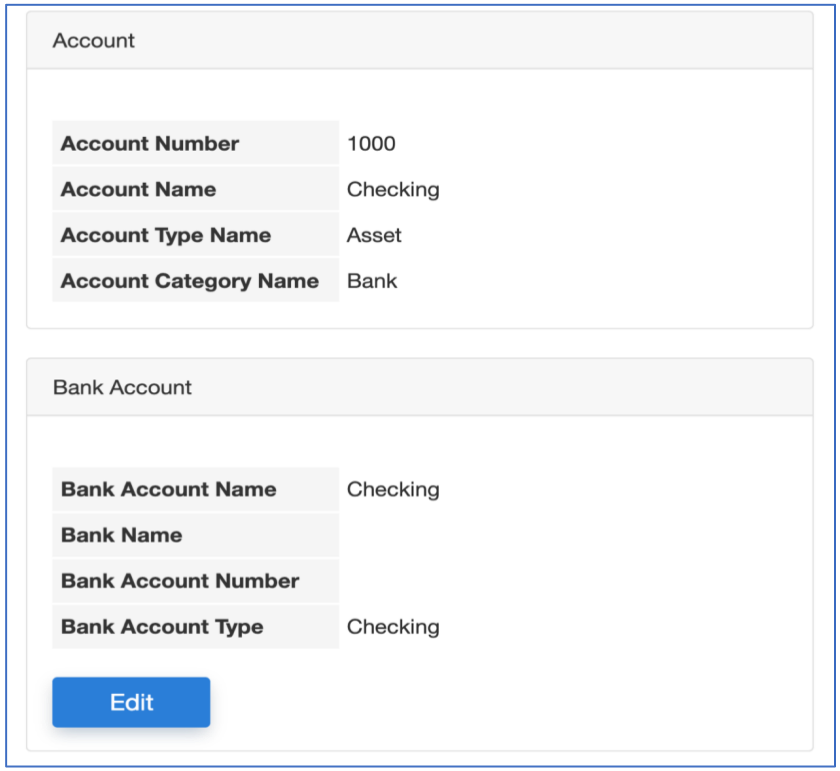
Financial Accounts & Projects

Chart of Accounts

Account Number	Account	Account Type	Account Category	Explanation
1000	Checking	Asset	Bank	checking and savings
1001	Invoices Receivable	Asset	Accounts Receivable	invoices that you haven't been paid for yet
1002	Inventory	Asset	Inventory	physical assets held
1003	Cash	Asset	Cash	petty cash balances
1004	Other Assets	Asset	Other Assets	all non-categorized assets
2000	Credit Card	Liability	Credit Card	credit card balances

Click on the “Accounts” tab to view the Club’s Chart of Accounts.

How to Add Bank Account Information

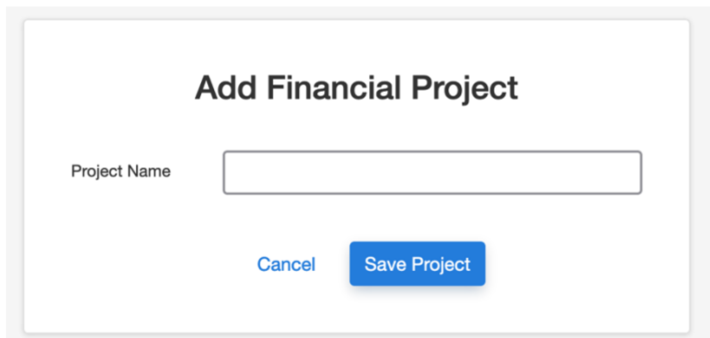


Click on the “Checking/Bank” account line.
Click on “Edit” to add Club Bank Account information.
Enter Club banking information.
Click on “Save Bank Account.”

How to Add Financial Projects

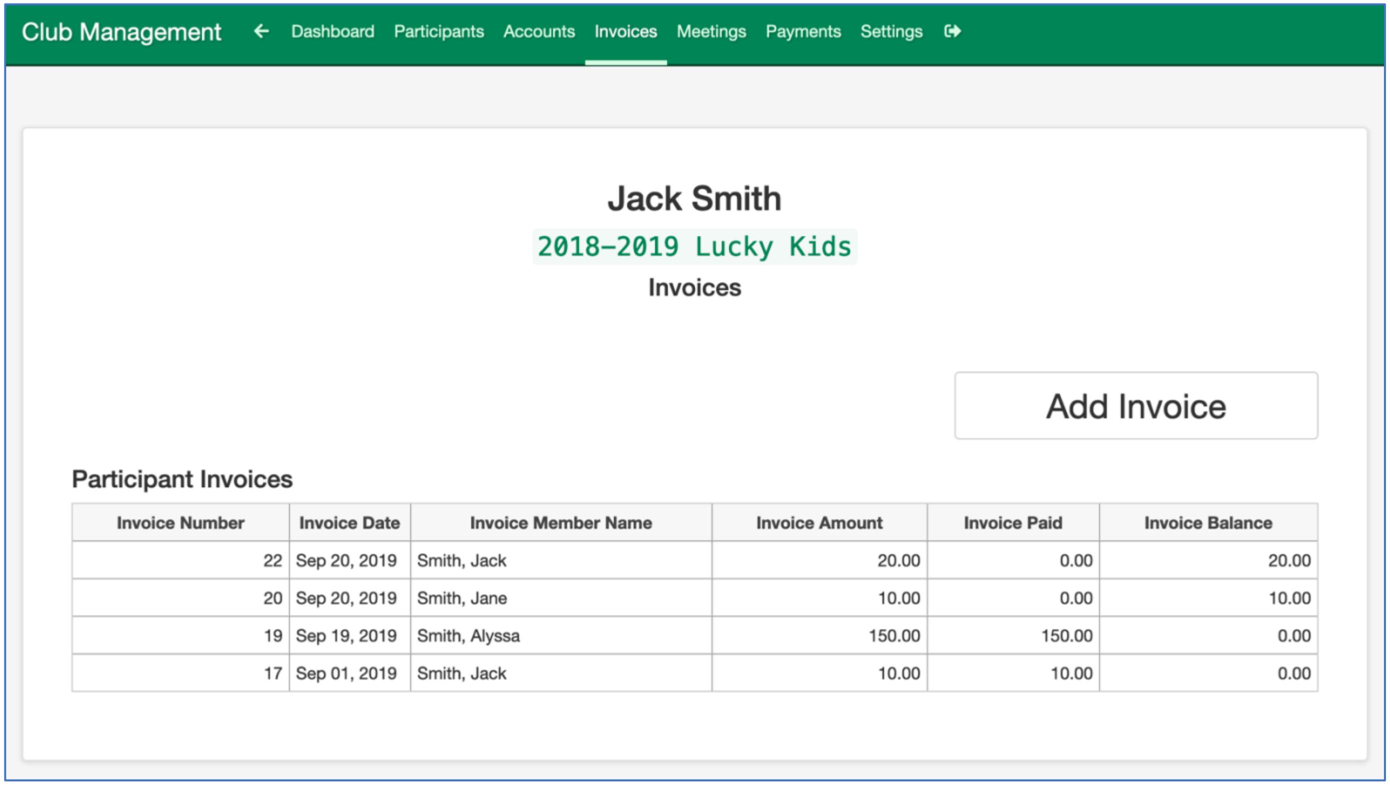
Financial Projects are used for specific projects that the Club is working on and can be associated with Ledger Items (Income and Expenses). This allows the Club to track funds related to special Financial Projects.

Scroll to the bottom of the Accounts List and click “Add Project.”



Enter the name of the Financial Project.
Click “Save Project.”

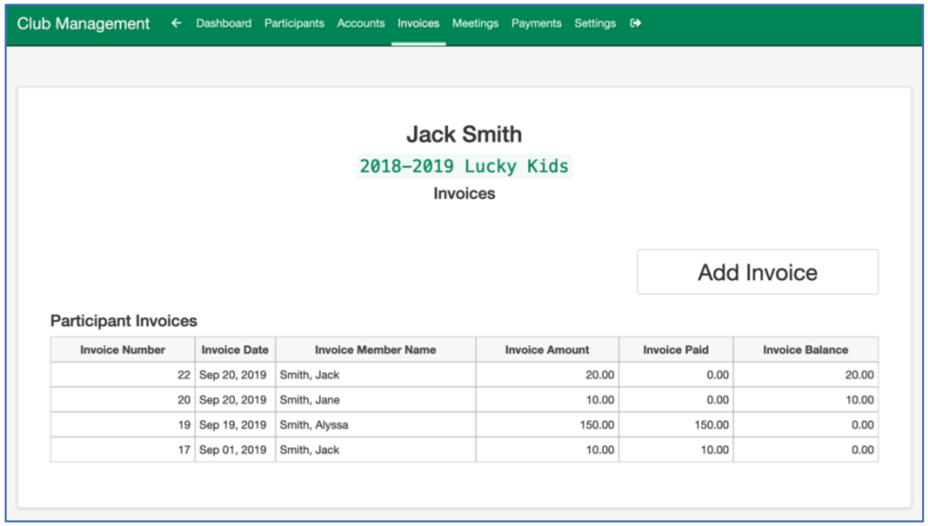
How to Create and Track Invoices



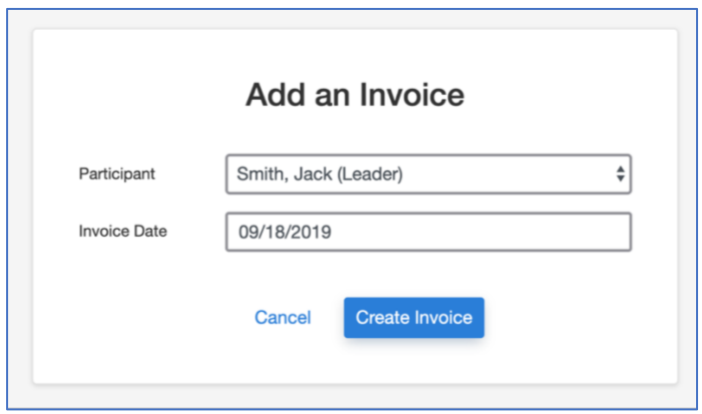
Invoice Number	Invoice Date	Invoice Member Name	Invoice Amount	Invoice Paid	Invoice Balance
22	Sep 20, 2019	Smith, Jack	20.00	0.00	20.00
20	Sep 20, 2019	Smith, Jane	10.00	0.00	10.00
19	Sep 19, 2019	Smith, Alyssa	150.00	150.00	0.00
17	Sep 01, 2019	Smith, Jack	10.00	10.00	0.00

Click on the “Invoices” tab to view existing Invoices.
Click on “Add Invoice” to create a new invoice.

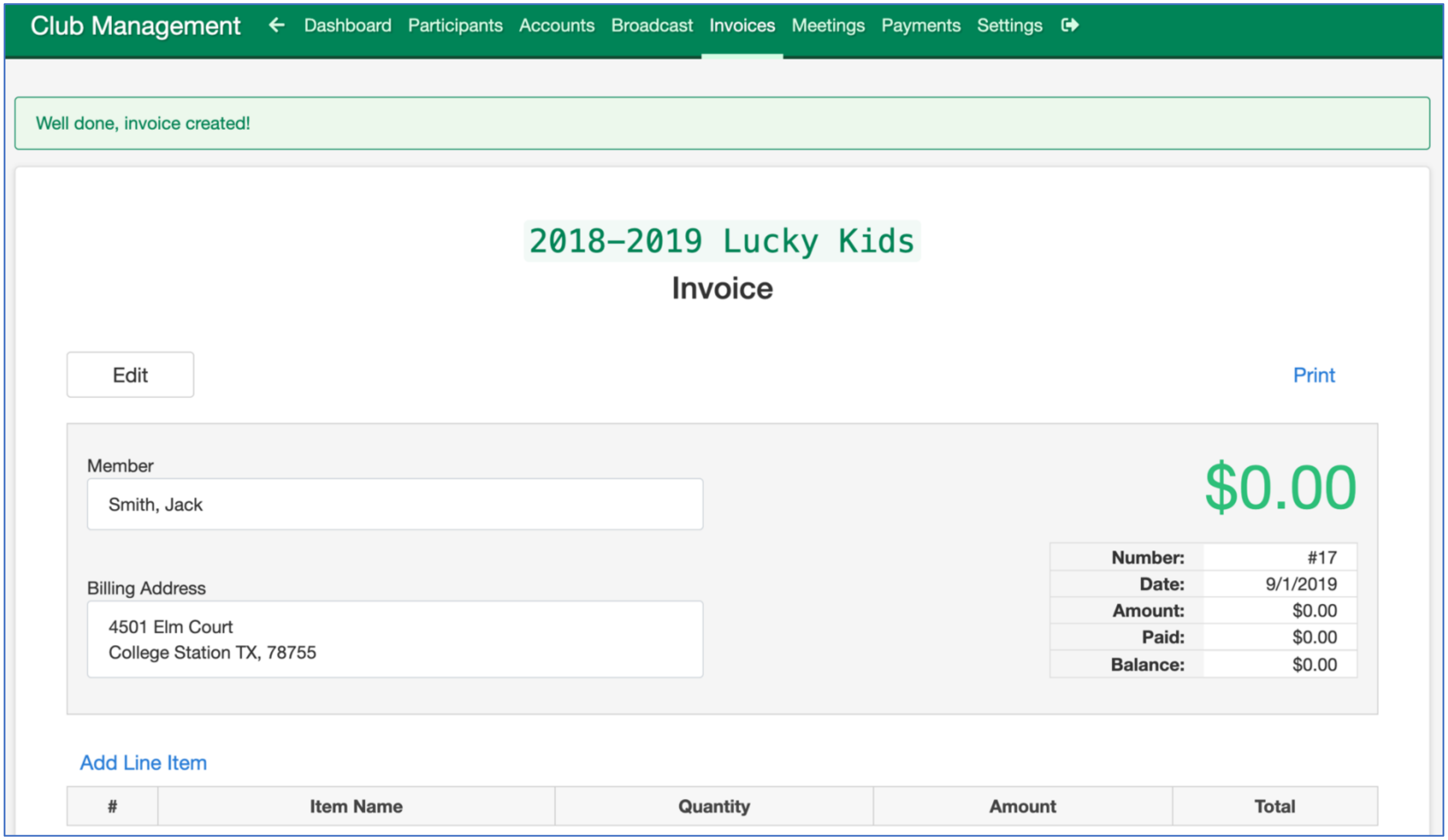
Add a New Invoice



Click Add Invoice.



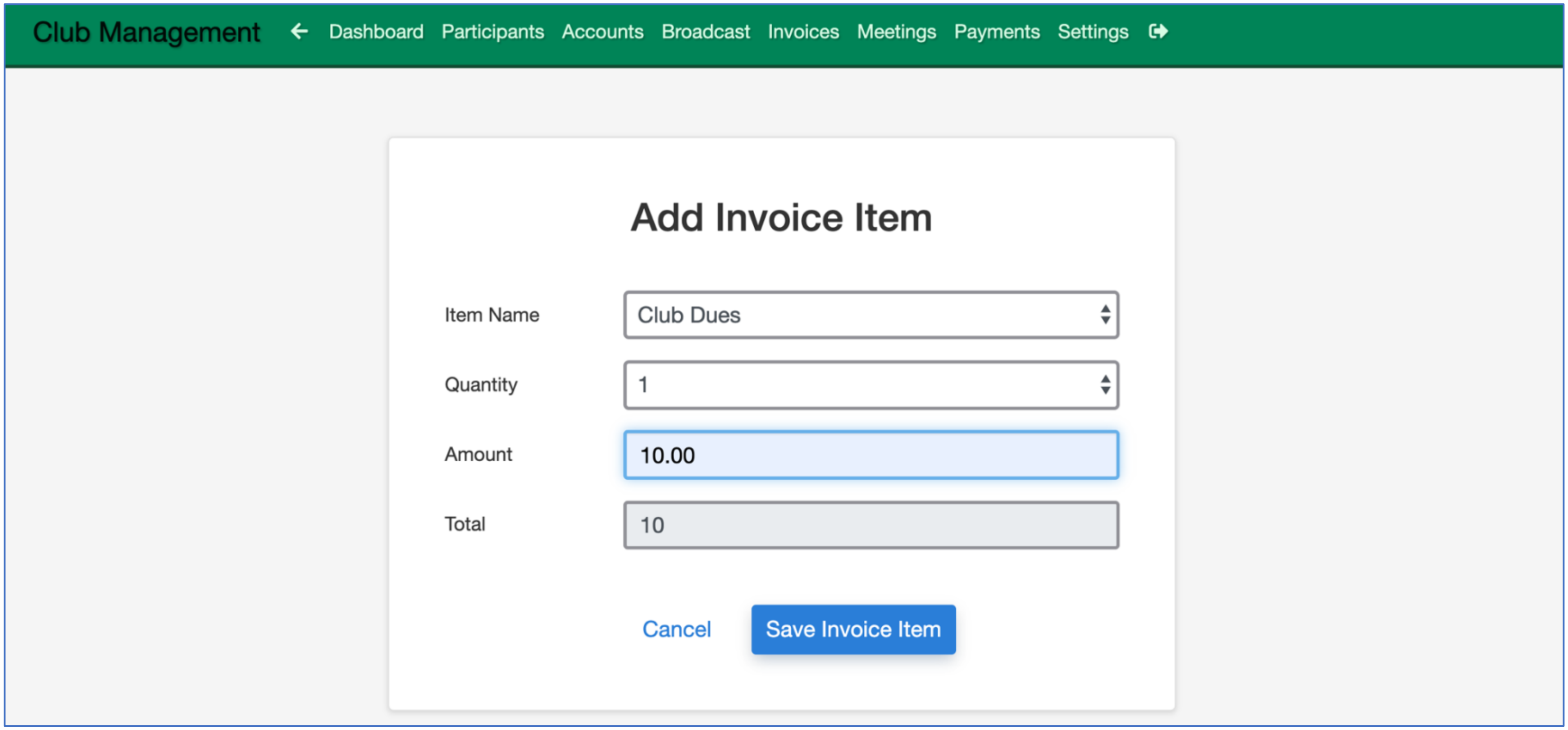
Select Participant and Invoice Date.
Click "Create Invoice."



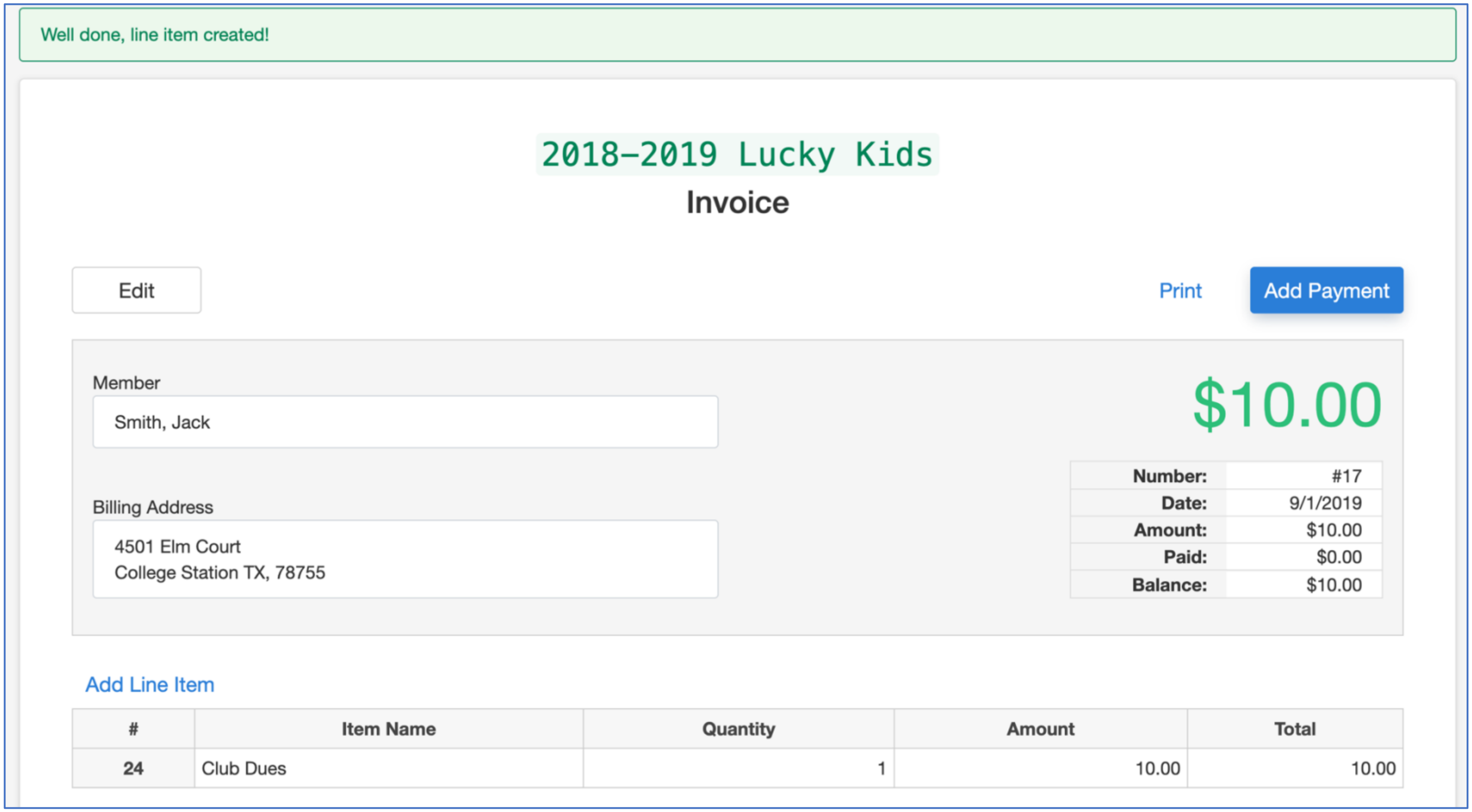
Click “Add Line Item” to add charges.

*NOTE: Line Items must be created under “Settings” before they will appear to select for Invoices.

See “Settings” for instructions.

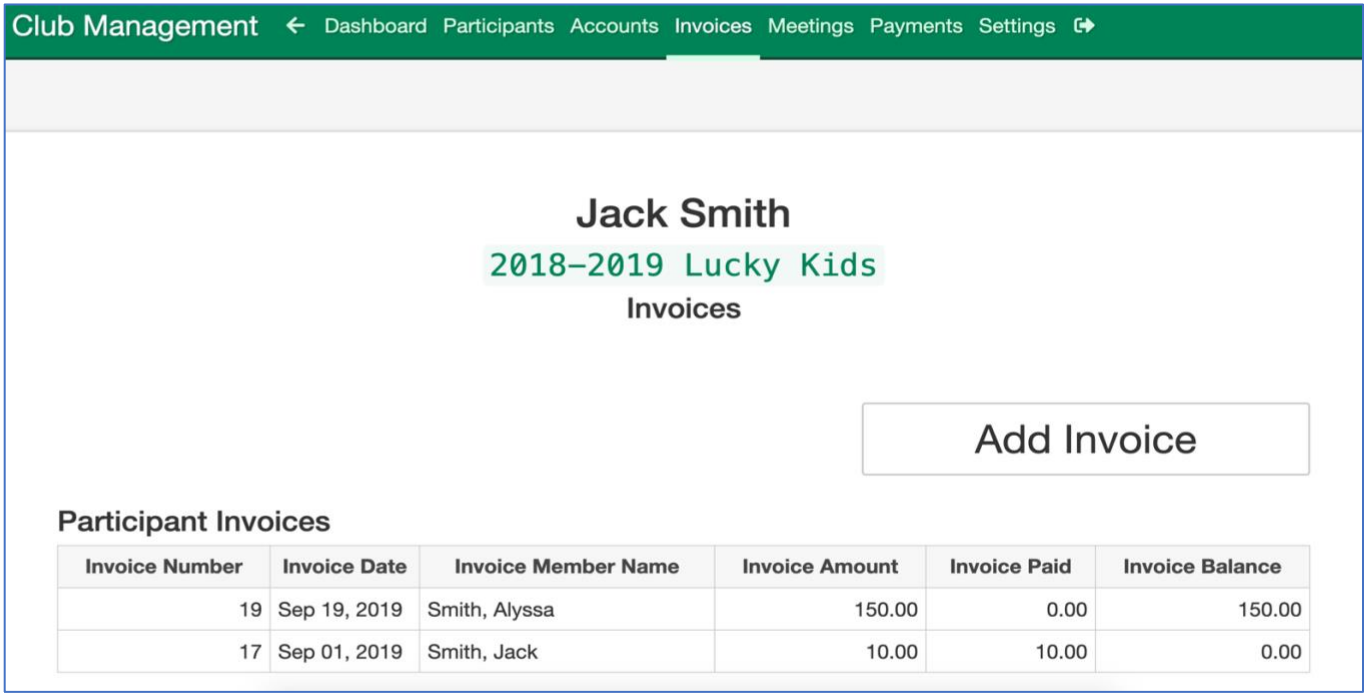


Select Item Name from drop-down list.
Add Quantity.
Select billing Amount for individual item.
Click "Save Invoice Item."

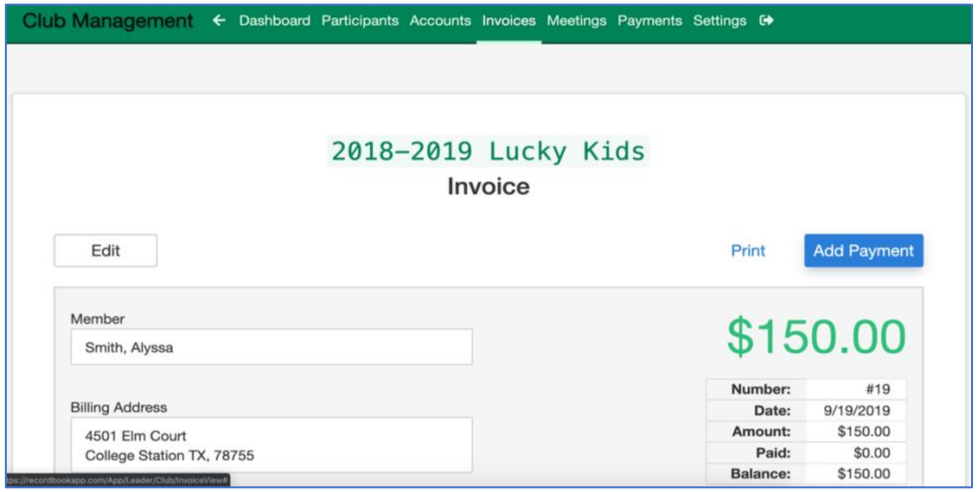


Print Invoice by clicking the "Print" button.
Click "Add Payment" to enter a member's Cash or Check payment.
Click the "Invoices" tab to return to Invoice list

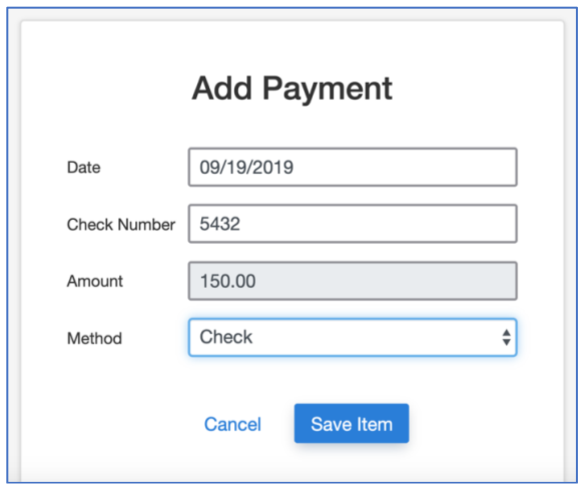
Record Cash or Check Payments for Existing Invoices



Click on the Invoices tab.
Click on the Invoice for which you would like to record payment.

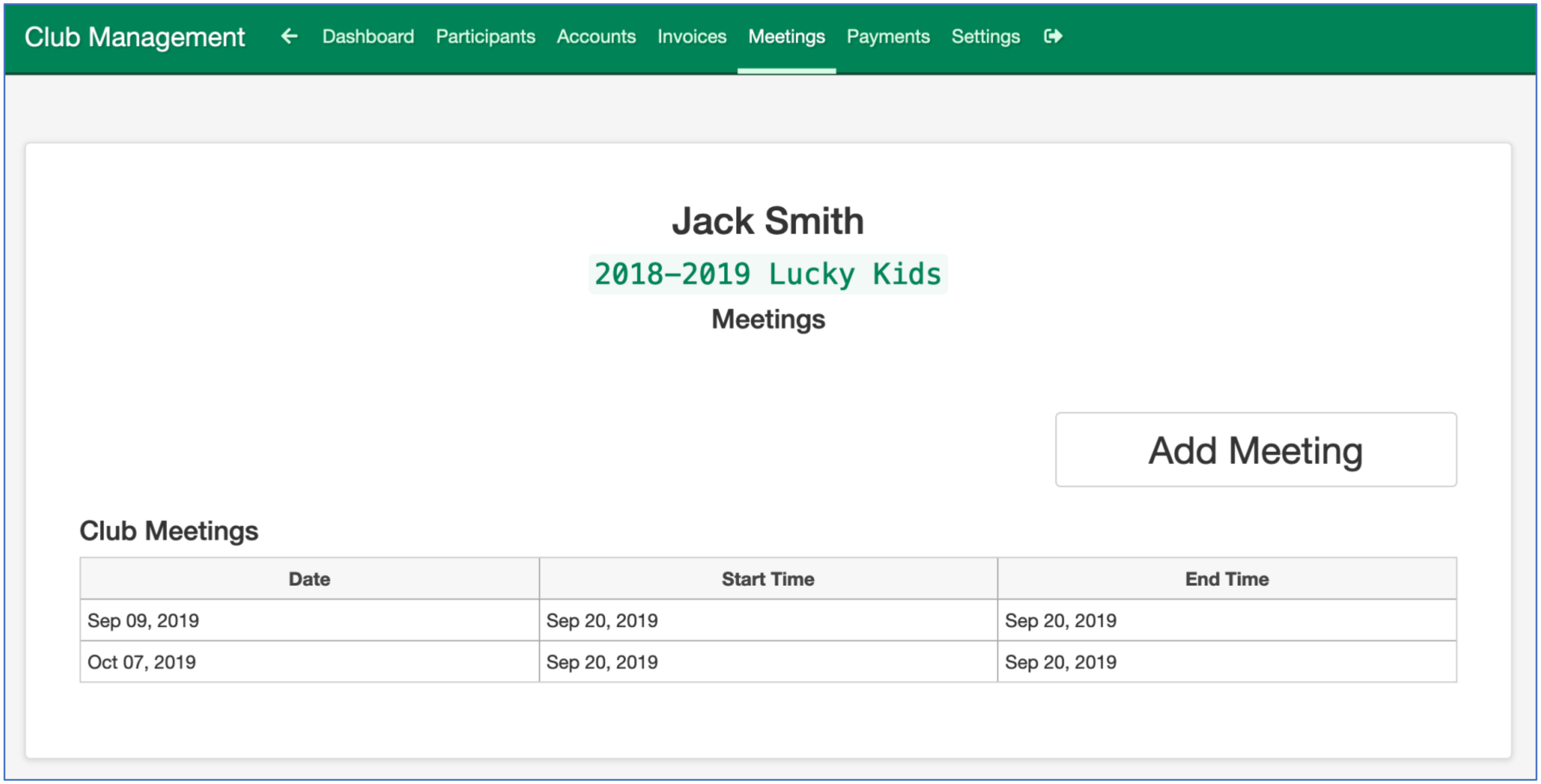


Click on "Add Payment."



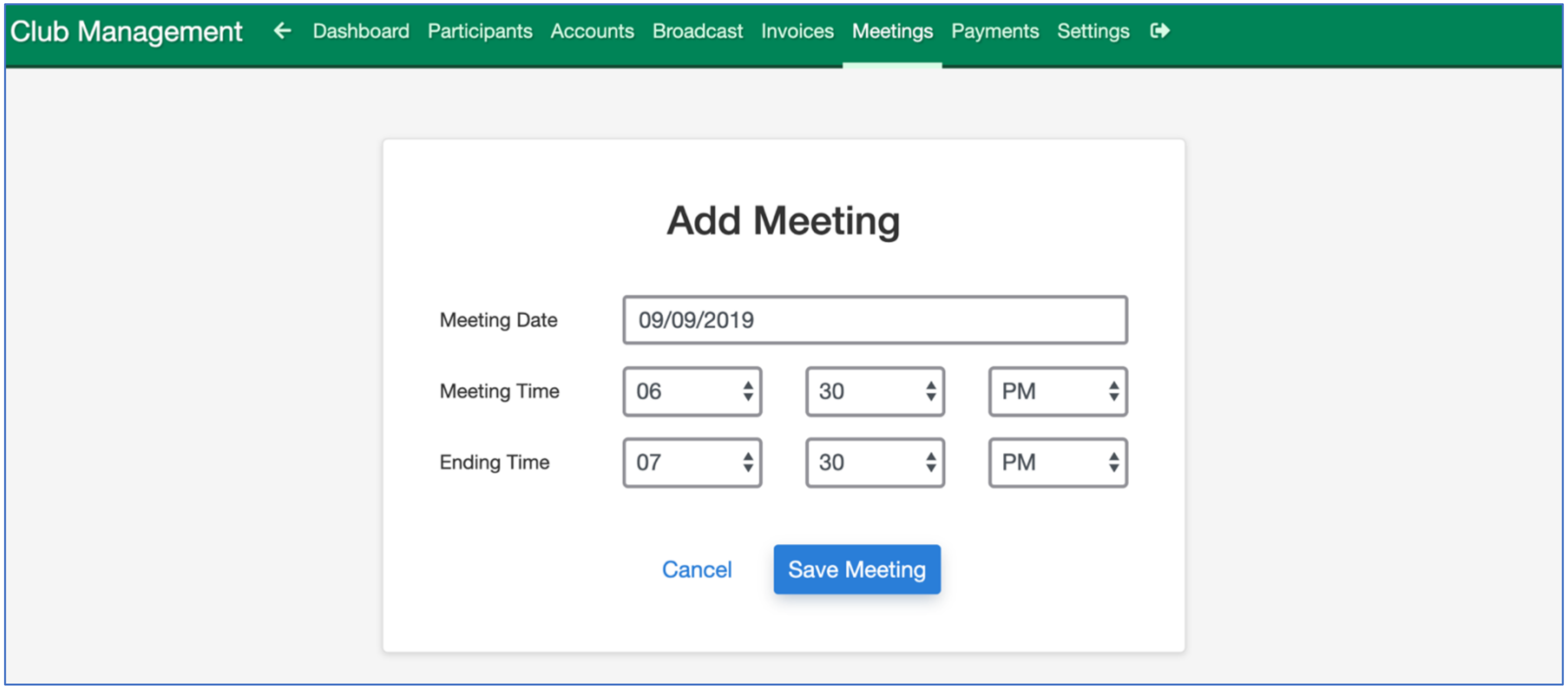
Enter Payment details
Click "Save Item."

How to Manage Meetings



Click on the “Meetings” tab.
Click on a meeting to view or edit an existing Meeting.
Click on “Add Meeting” to create a new Meeting.

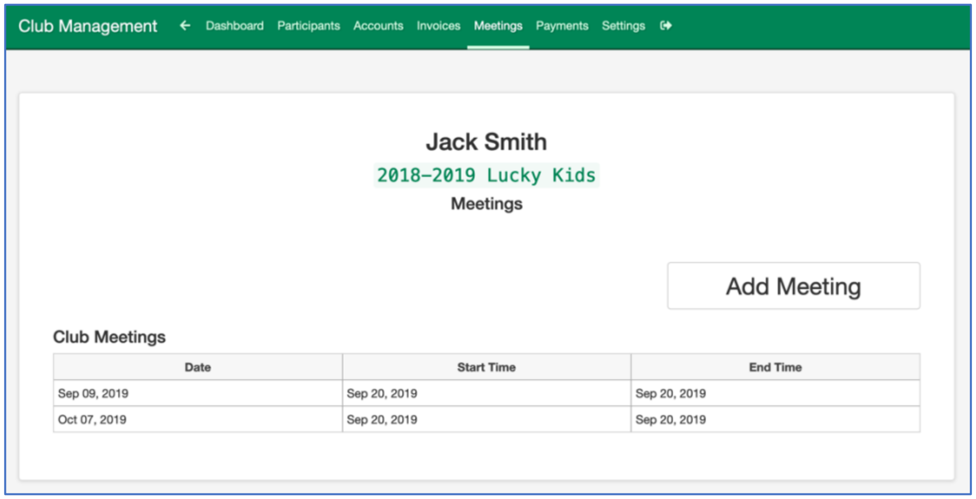
How to Add a New Meeting



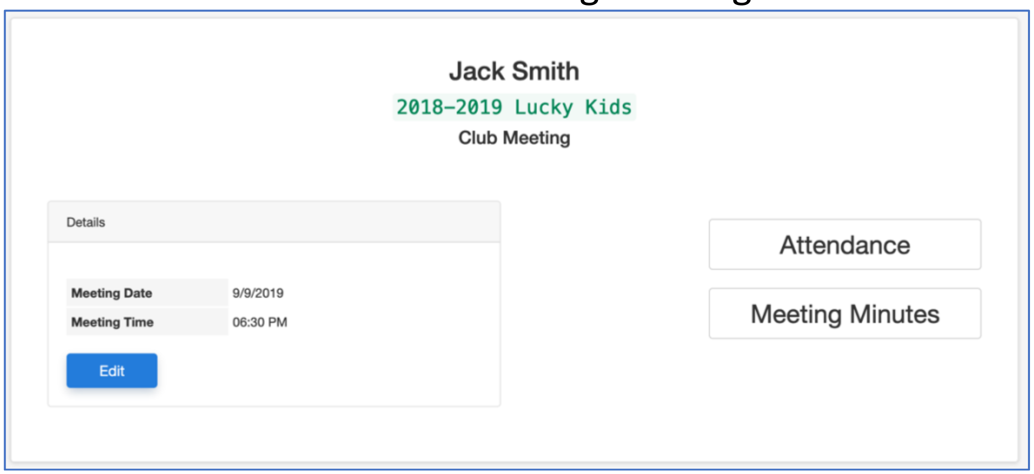
Enter the Meeting Date and Times
Click on "Save Meeting."

*NOTE: This step must be completed before the Club Secretary will be able to add Meeting Attendance and Meeting Minutes.

How to Edit Existing Meetings



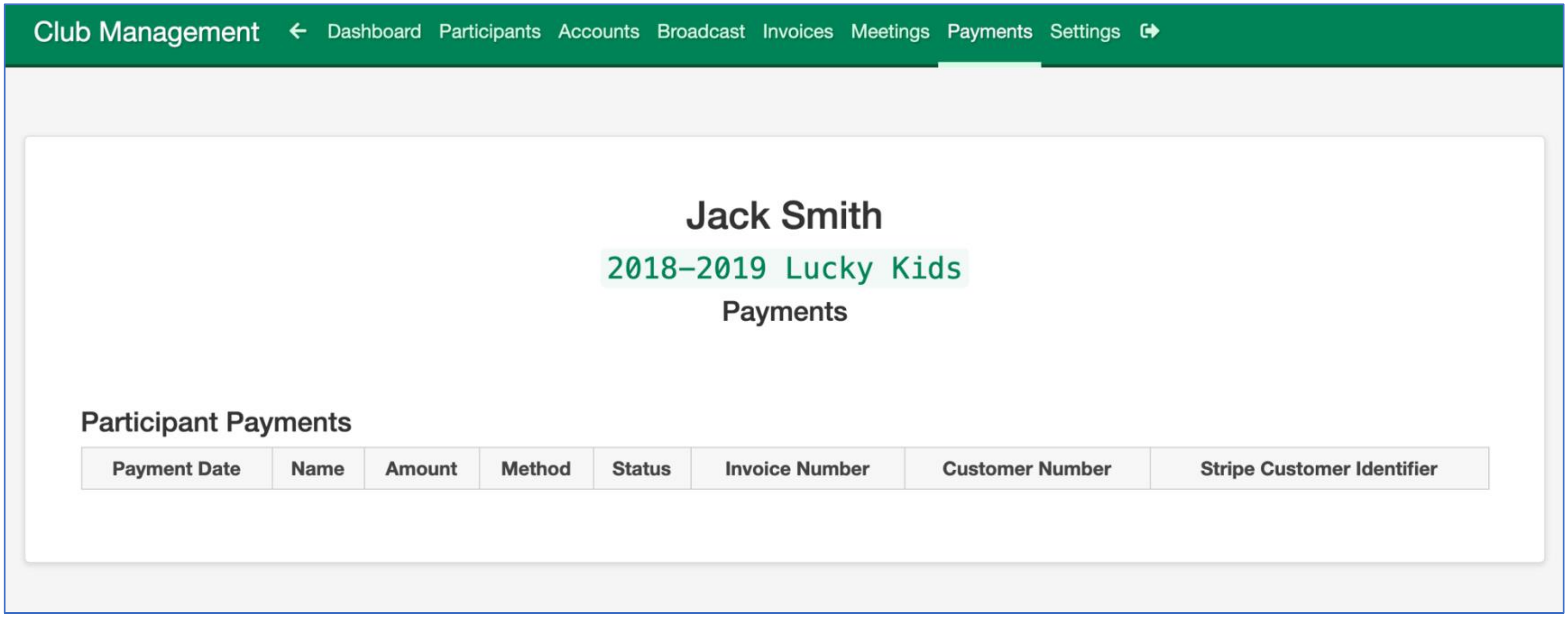
Click on an existing meeting.



Click Edit to change the Meeting date and/or time.

Click Attendance or Meeting Minutes to record the respective information.

View Participant Payments

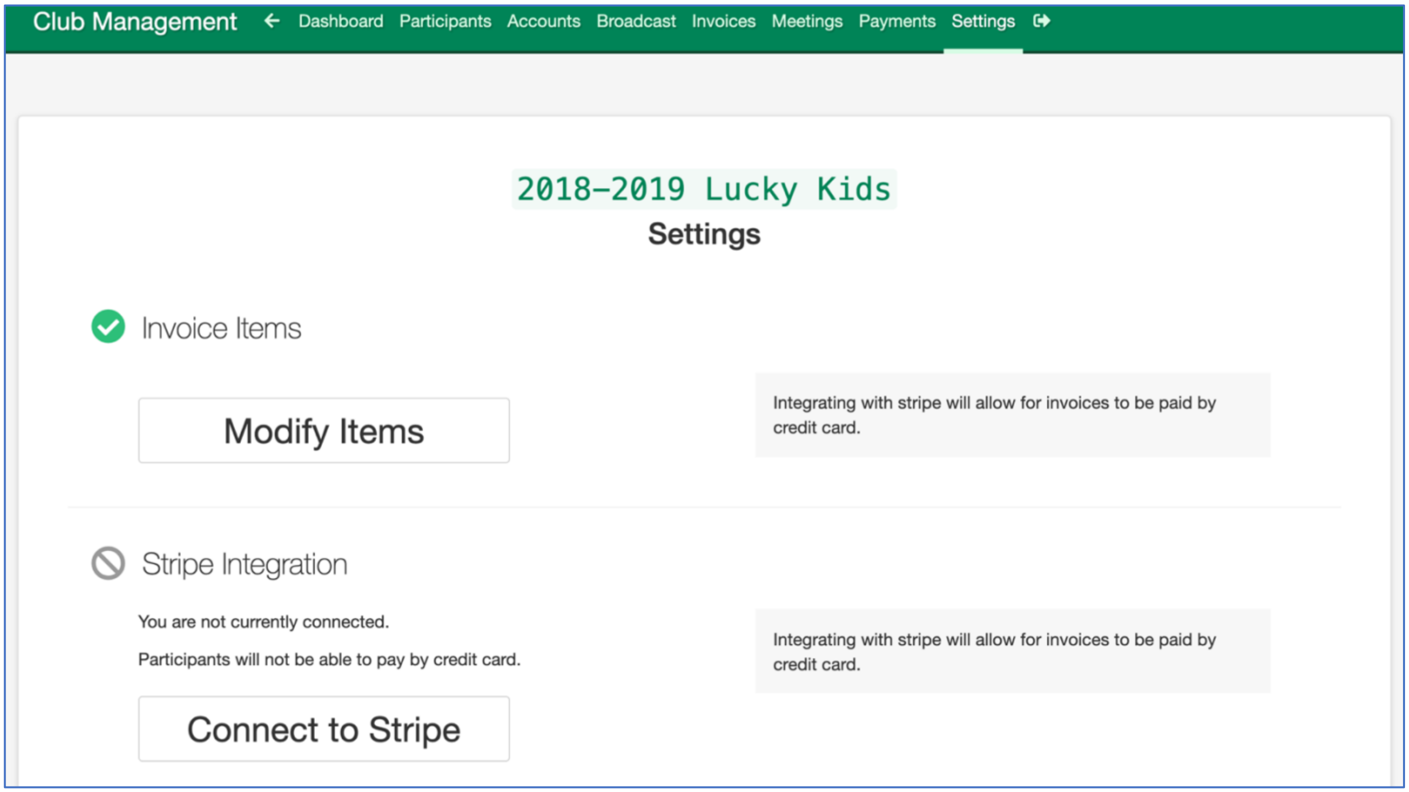


View Payments made by Members

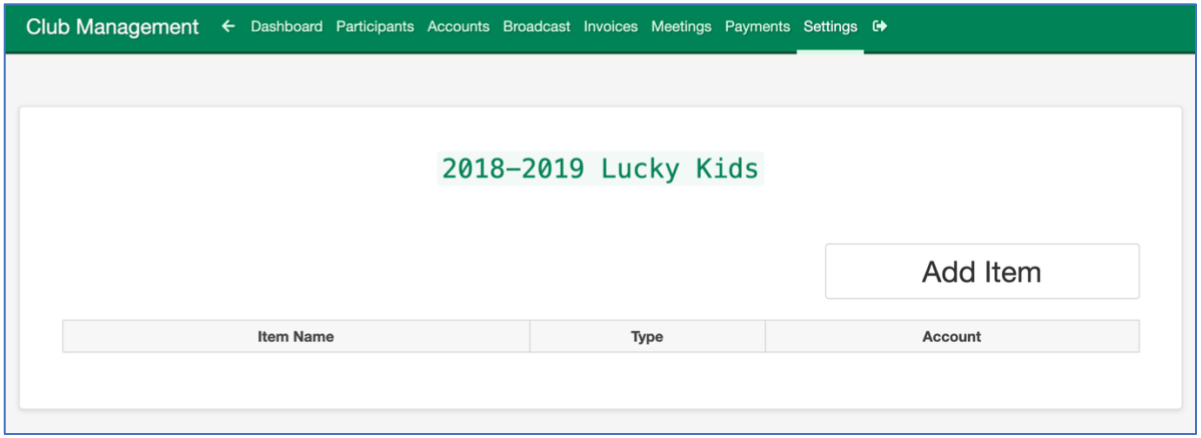
Settings

You may add or modify Invoice items and Connect with Stripe in order to accept Credit Card payments under the Settings tab.

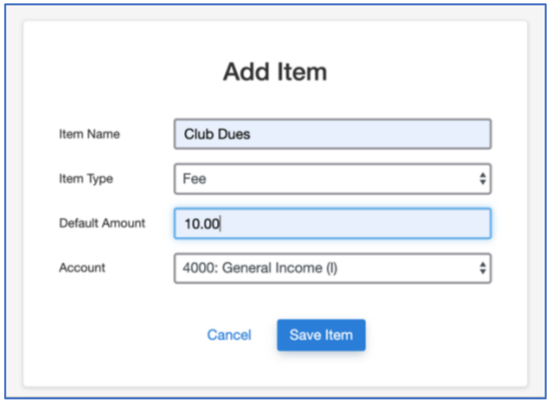
Adding Invoice Line Items



Click on the "Modify Items" button.

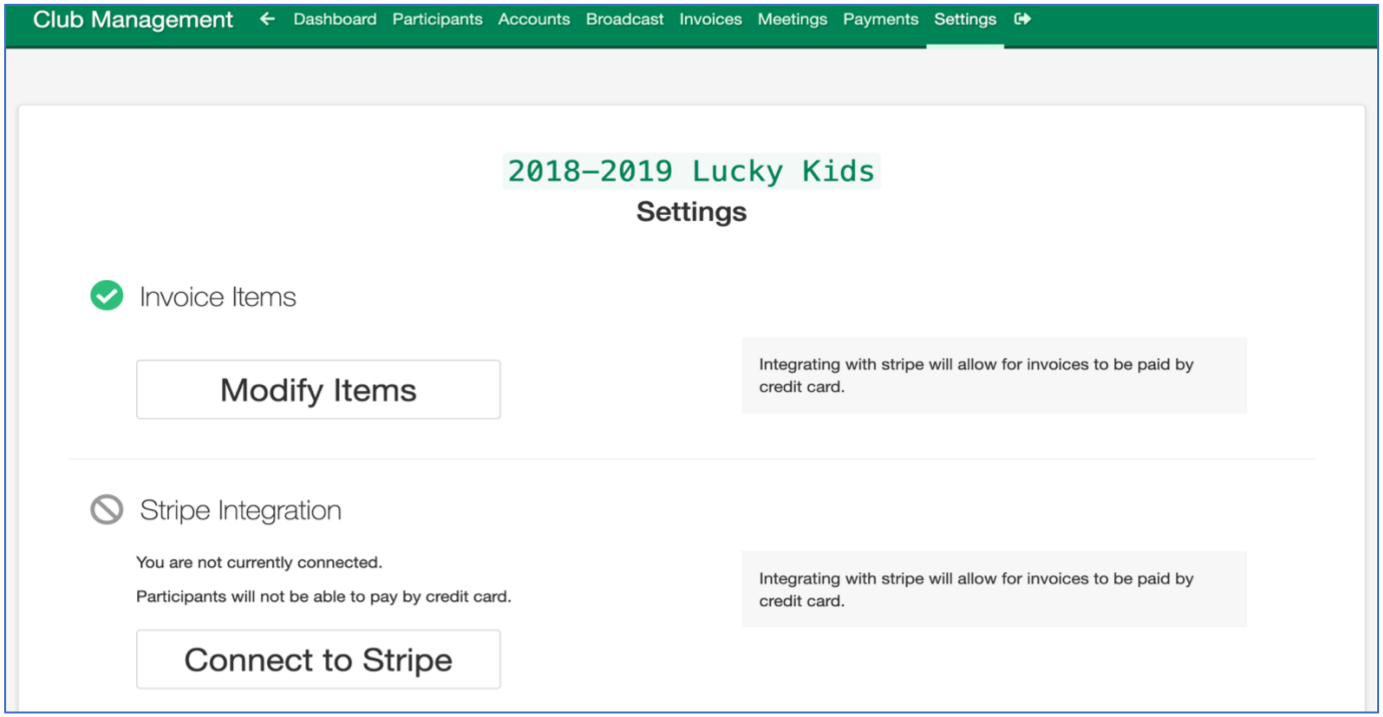


Click on “Add Item” button to add line items for invoices.

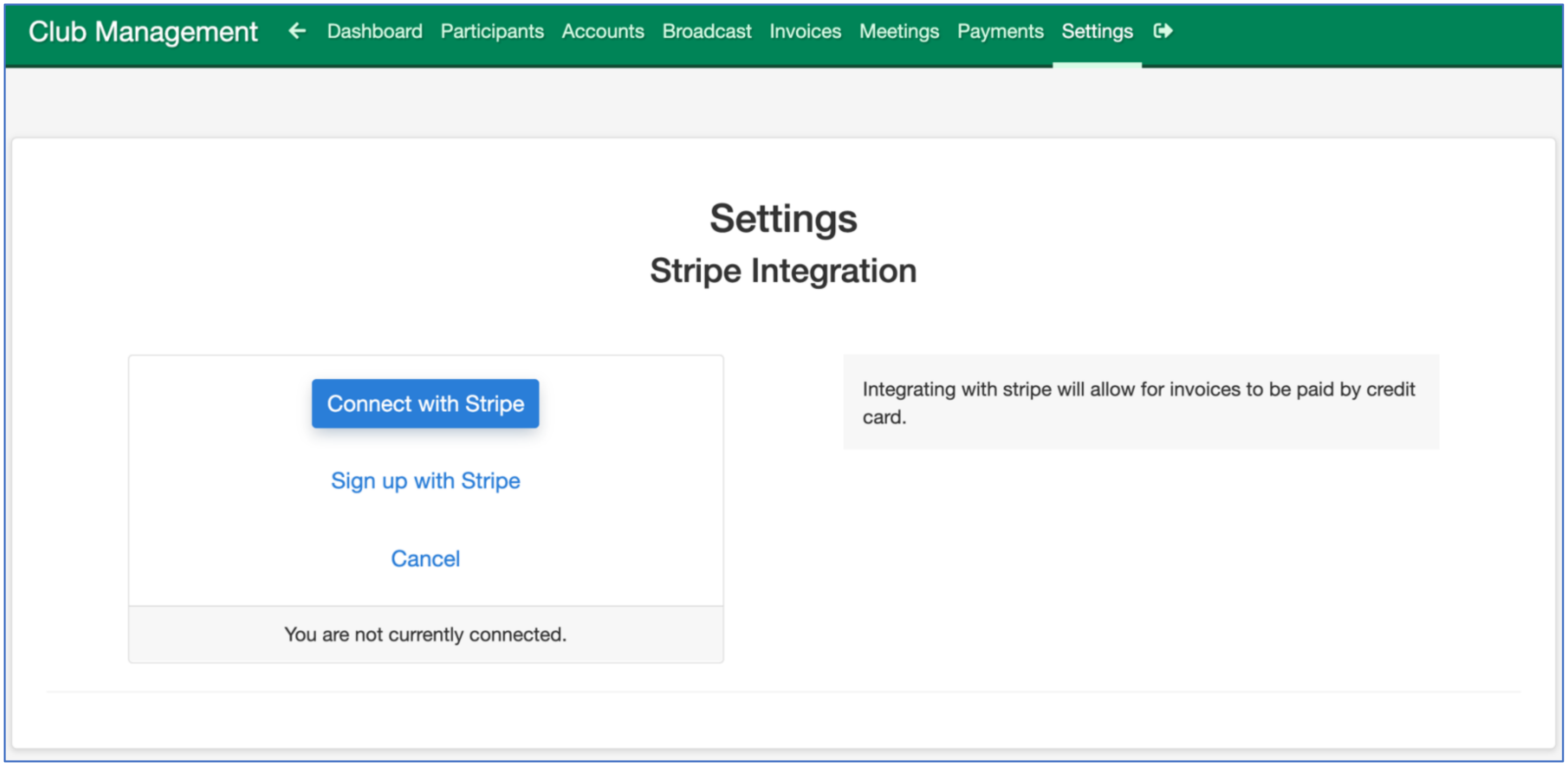


Enter the Item Name.
Select Item Type from Drop Down Menu.
Enter the default amount for each item.
Select the Account from the drop-down menu to which the item should be assigned.
Click “Save Item.”

How to Set up Credit Card Payments



Click the “Connect to Stripe” button.



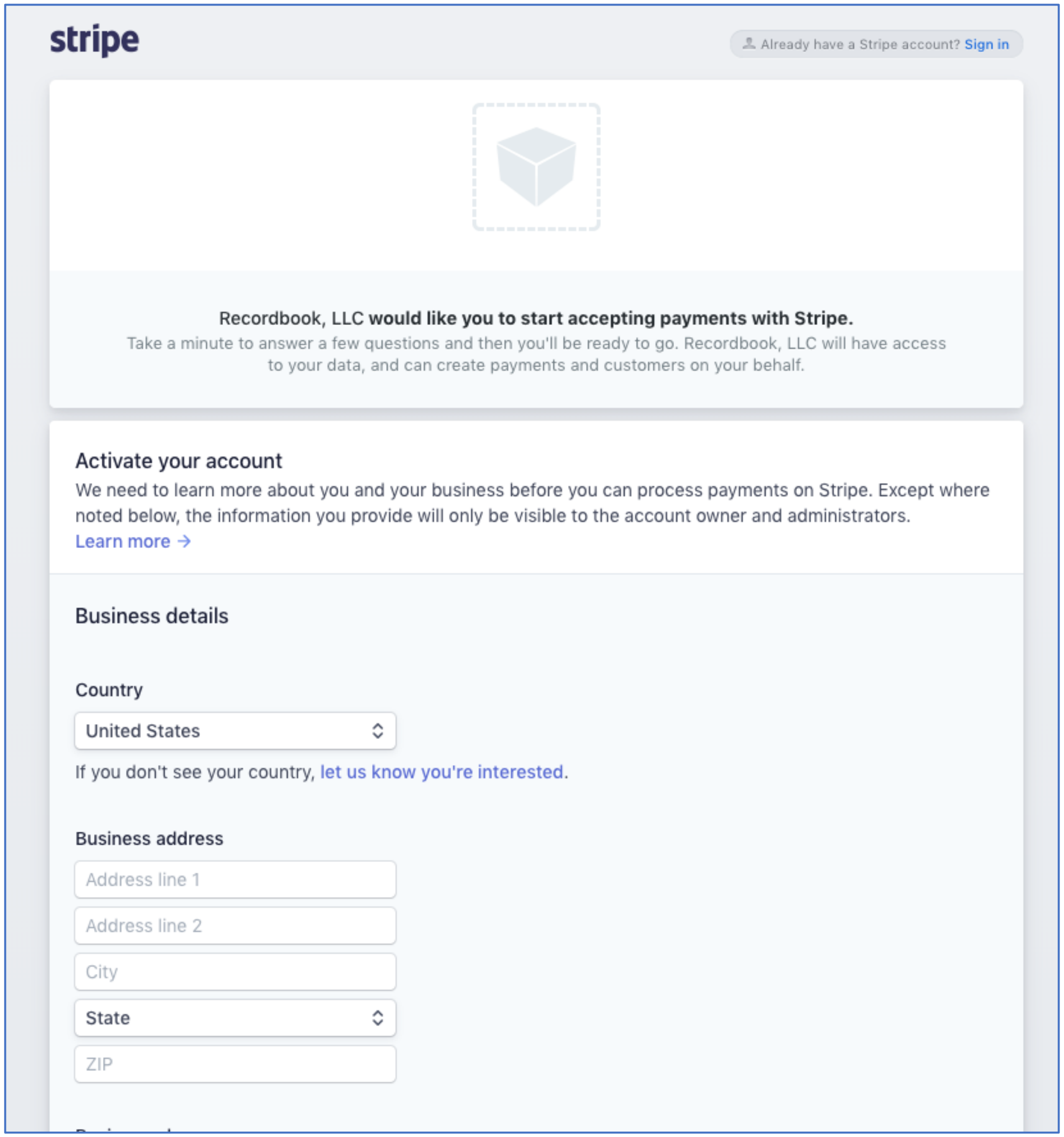
Click on "Sign up with Stripe" to create a new Stripe account.

Click on "Connect with Stripe" button if you already have an account with Stripe

*NOTE: You will be directed to Stripe's website to complete your account set up.

Stripe will deposit funds from credit card payments in to your bank account as they are processed.

Complete the Stripe Account information to create a new Stripe account.


stripe

Already have a Stripe account? Sign in

Recordbook, LLC **would like you to start accepting payments with Stripe.**

Take a minute to answer a few questions and then you'll be ready to go. Recordbook, LLC will have access to your data, and can create payments and customers on your behalf.

Activate your account

We need to learn more about you and your business before you can process payments on Stripe. Except where noted below, the information you provide will only be visible to the account owner and administrators.

Learn more →

Business details

Country

United States

If you don't see your country, let us know you're interested.

Business address

Address line 1

Address line 2

City

State

ZIP

Business phone

US +1 (555) 678-1212

Type of business

Individual, sole proprietor, or single-member LLC

Employer Identification Number (EIN) Optional

12-3456789

If you use your Social Security number for business tax purposes, you can use that instead.

Business website

company.com

No website yet? You can share an app store link or a social media profile (business profiles are preferred).

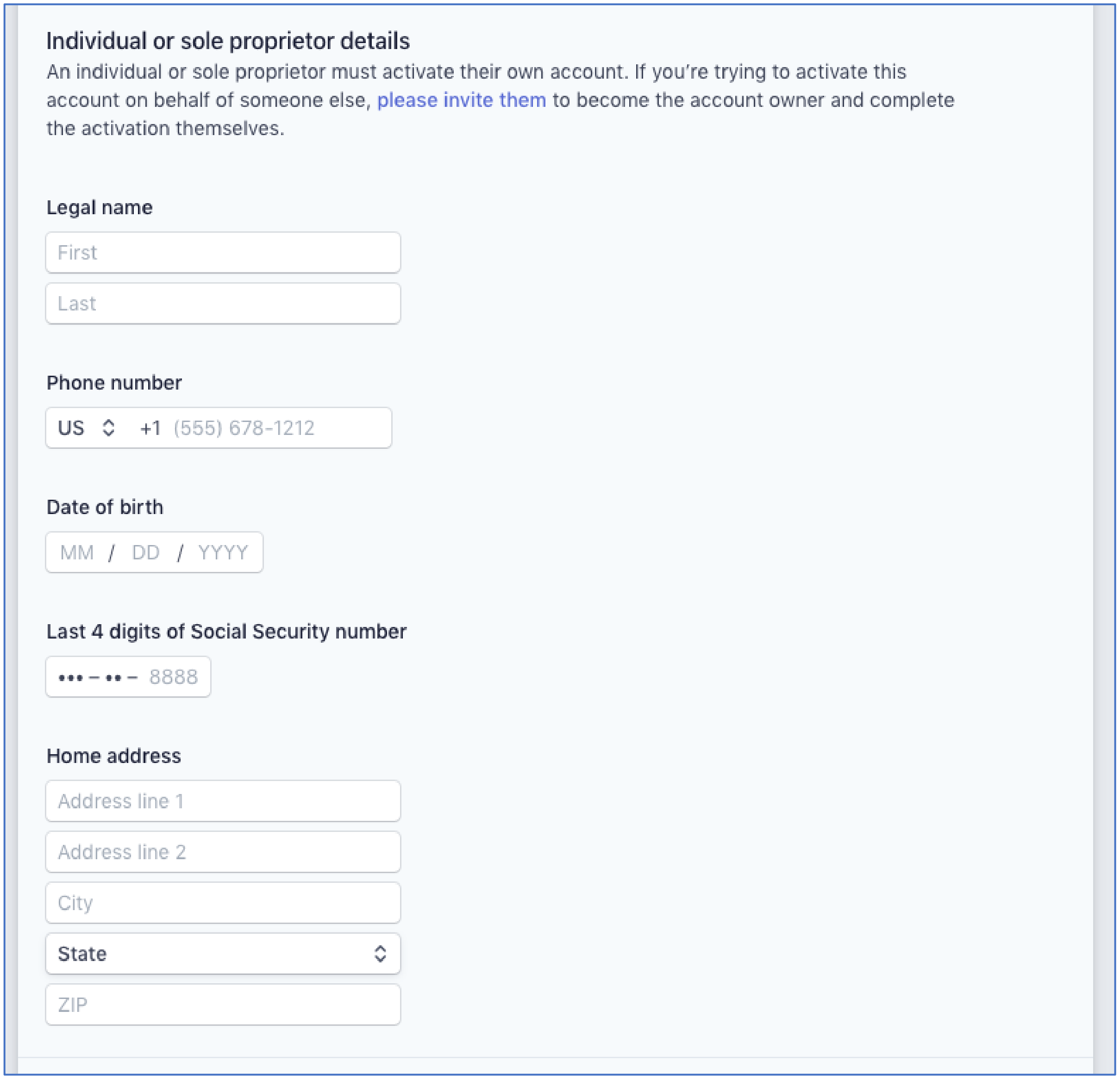
Business description

Please select your industry...

Describe what you sell, whom you sell to, and when you charge your customers.

How long after paying will your customers typically receive their goods or services?

Please select...



Individual or sole proprietor details

An individual or sole proprietor must activate their own account. If you're trying to activate this account on behalf of someone else, please invite them to become the account owner and complete the activation themselves.

Legal name

First

Last

Phone number

US +1 (555) 678-1212

Date of birth

MM / DD / YYYY

Last 4 digits of Social Security number

•••–••– 8888

Home address

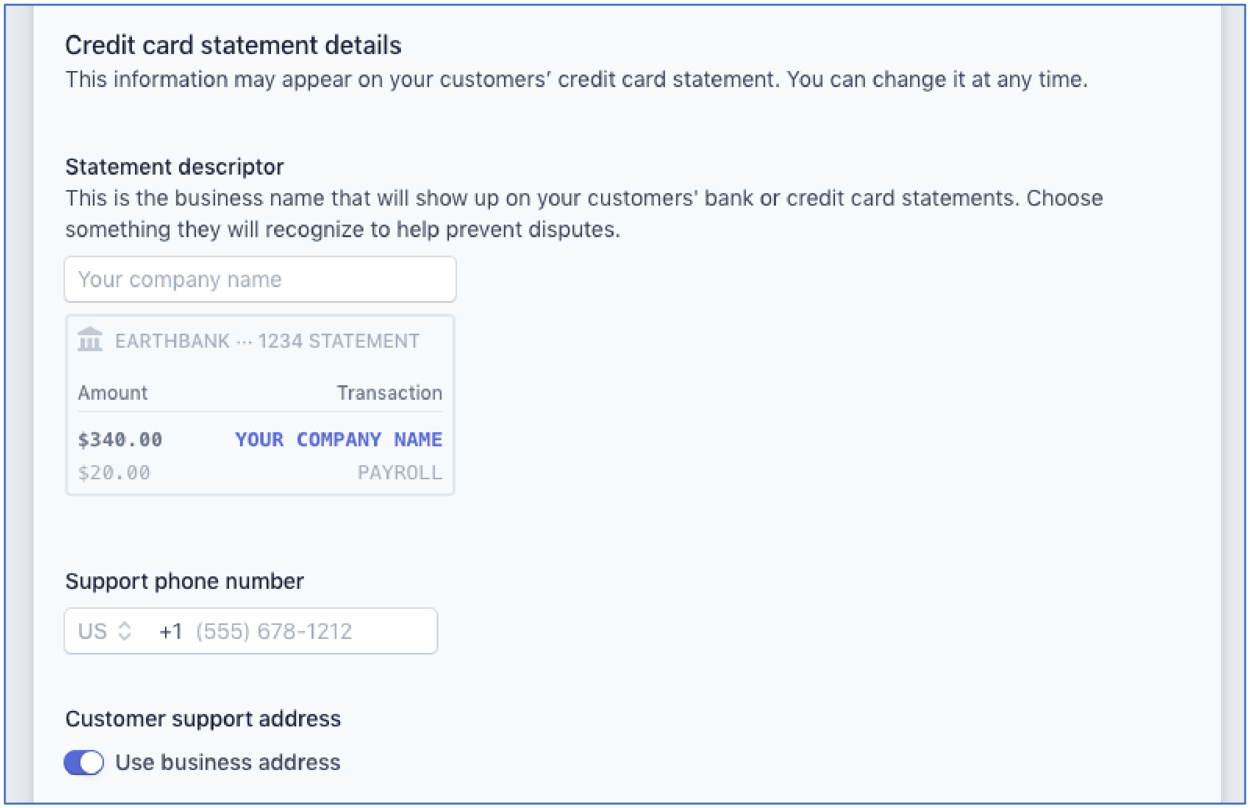
Address line 1

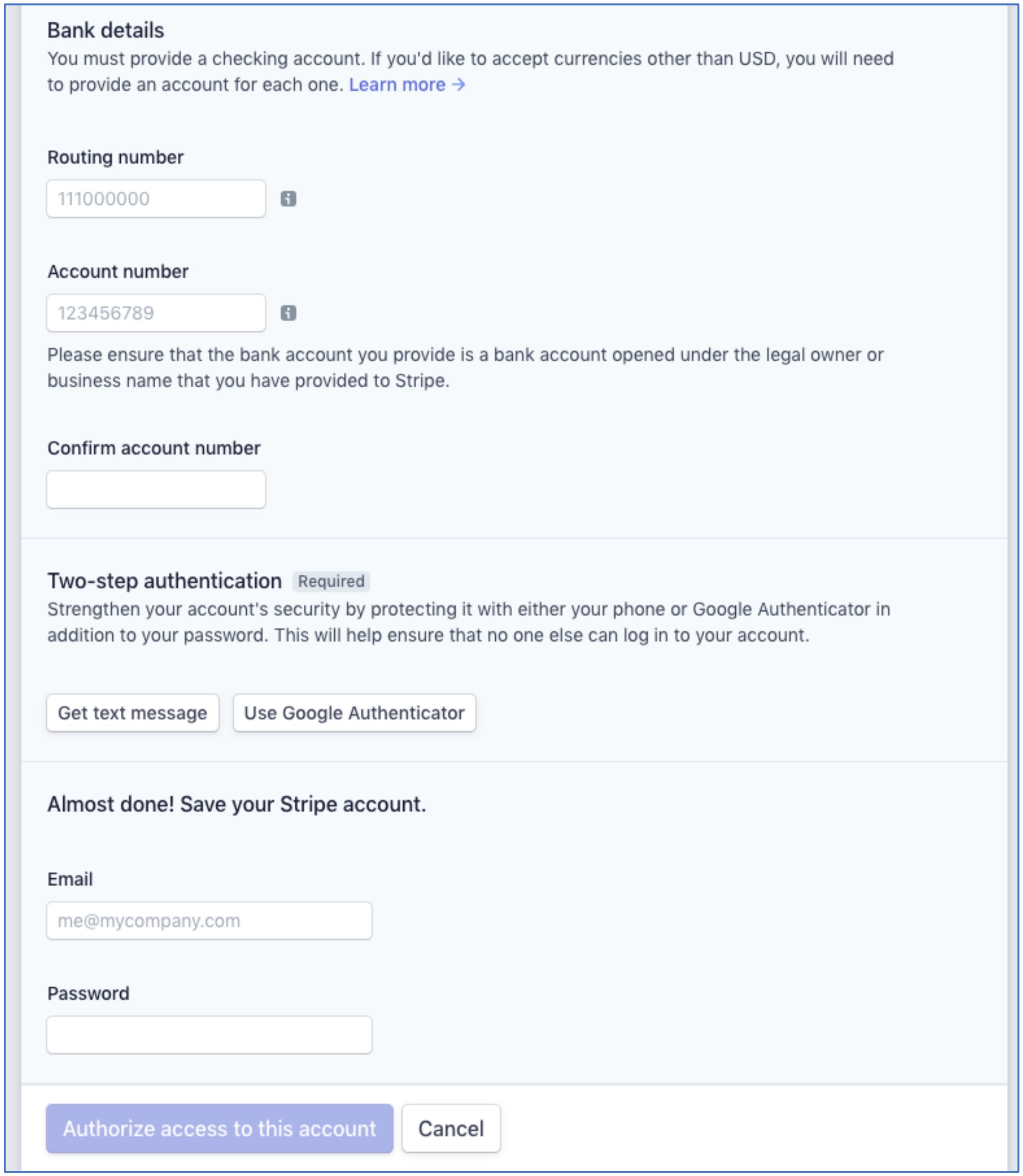
Address line 2

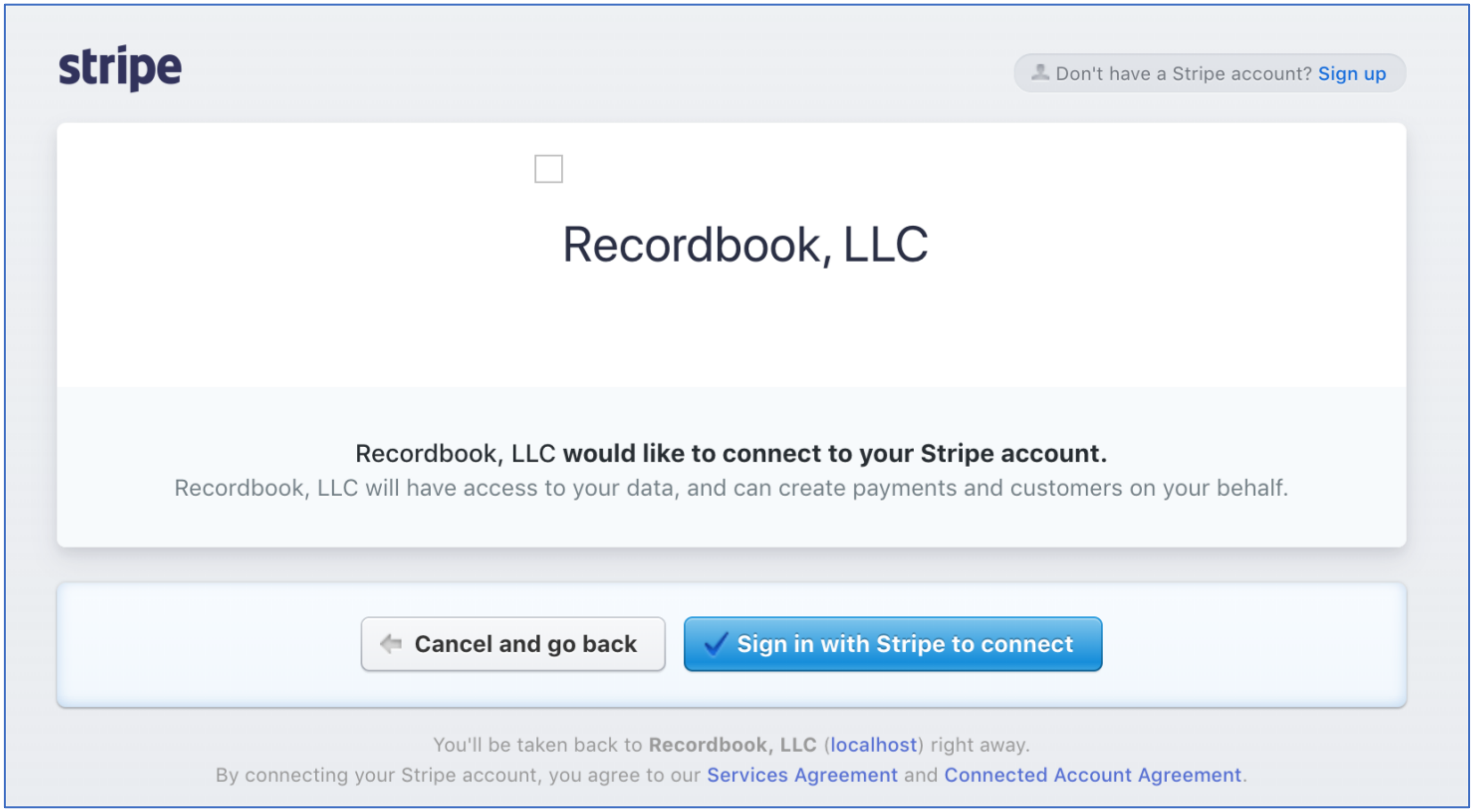
City

State

ZIP


Credit card statement details
This information may appear on your customers' credit card statement. You can change it at any time.
Statement descriptor
This is the business name that will show up on your customers' bank or credit card statements. Choose something they will recognize to help prevent disputes.
Your company name
EARTHBANK ··· 1234 STATEMENT
Amount
Transaction
$340.00
YOUR COMPANY NAME
$20.00
PAYROLL
Support phone number
US
+1 (555) 678-1212
Customer support address
Use business address


Bank details
You must provide a checking account. If you'd like to accept currencies other than USD, you will need to provide an account for each one. Learn more →
Routing number
111000000
Account number
123456789
Please ensure that the bank account you provide is a bank account opened under the legal owner or business name that you have provided to Stripe.
Confirm account number
Two-step authentication
Required
Strengthen your account's security by protecting it with either your phone or Google Authenticator in addition to your password. This will help ensure that no one else can log in to your account.
Get text message
Use Google Authenticator
Almost done! Save your Stripe account.
Email
me@mycompany.com
Password
Authorize access to this account
Cancel



Click on "Sign In with Stripe to Connect" to log in to an existing account.