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Logging into SCM

Go to: <u>www.ACTEonline.org</u> Log into your profile.

ABOLT WHY CEP ADVOCACY PROFESSIONAL DEVELOPMENT PARTNERS PRESS CENTER PUBLICATIONS & LESSON PLAN RESOURCES SIGN IN SHOPACTE JOIN ACTE CART ABOUT VHY CTEP ADVOCACY PROFESSIONAL DEVELOPMENT PARTNERS PRESS CENTER PUBLICATIONS & LESSON PLAN RESOURCES Image: Carter & TECHNICAL EDUCATION* VHY CTEP ADVOCACY PROFESSIONAL DEVELOPMENT PARTNERS PRESS CENTER PUBLICATIONS & CONTACT US	ACTE AS	SOCIATION REER & TEC UCATION®	FOR CHNICAL		JOIN ACTE!	COVID-19 RES	SOURCES SHO	OPACTE COM	NTACT US
ASSOCIATION FOR CAREER & TECHNICAL EDUCATION* ABOUT VHY CTE? ADVOCACY PROFESSIONAL DEVELOPMENT PRATINERS PRESS CENTER PUBLICATIONS CONTACT US Sign In Username Kilemer@atconline.org Password Image: Sign In Sign In Sign In Forgot username? Forgot password?	ABOUT	WHY	CTE?	ADVOCACY	PROFESSIONAL DEVELOPMENT	PARTNERS	PRESS CEN	TER PUBLI	CATIONS & LESSON PLAN RESOURCES
ABOUT WHY CTE? ADVOCACY PROFESSIONAL DEVELOPMENT PARTNERS PRESS CENTER PUBLICATIONS CONTACT US Sign In Username Idlemer@acteonline.org Password Password Sign In Sign In									
ABOUT WHY CTE? ADVOCACY PROFESSIONAL DEVELOPMENT PARTNERS PRESS CENTER PUBLICATIONS CONTACT US	ACTE ASS CAP EDU	OCIATION F REER & TECH JCATION®	OR INICAL				SIGN	IIN SHOPAC	f ♥ in ◎ TE JOIN ACTE CART
Sign In Username kdiemer@acteonline.org Password Keep me signed in Sign In Forgot username? Forgot password?		ABOUT		ADVOCACY	PROFESSIONAL DEVELOPMENT	PARTNERS	PRESS CENTER	PUBLICATIONS	CONTACT US
				Sign In	Username kdiemer@acteonline.or Password Keep me signed in Sign in Forgot username2 Fo	d orgot password?			

At least one State Administrator will be granted access to the State Chapter Module. This must be set up prior to gaining access to the state's membership information. Contact Kelli Diemer for information.

Open a second tab and go to https://web.acteonline.org/scm

ACTE	ASSOCIATION FOR CAREER & TECHNICAL EDUCATION®	SIGN OUT	HI, KELLI DIEMER	f ♥ in © SHOPACTE ² CART
	ACTE CHAPTER ADMINISTRATION	BACK TO ACTEONLINE.ORG	CONTACT US	
SCM /	Admin Portal Homepage			

State Chapter Module Main Screen

The descriptions of available Chapter Reports are listed on the main screen.

Chapter Reports

- Current Members chapter members who are regarded as current active members of ACTE national as of today's date.
 Additional reports show members who fall within a 30, 60, and 90-day grace period.
- Financial Roster transactions with ACTE for all chapter members.
- Historical Roster chapter members from all time regardless of their current ACTE national membership status.
- Lapsed Members chapter members who have expired and exceeded the 90-day grace period.
- New Members chapter members who have joined within the past 30, 60, or 90 days.
- Renewals chapter members who have paid their renewal in the past 30, 60, or 90 days.
- Roster Listings with No Email Address chapter contacts who have no email address on file in the ACTE national database.
- Roster Listings with No Mailing Address chapter contacts who have missing or incomplete address data on the ACTE national database.
- State Financial Detail Report (ACH) Report showing the state's ACH monthly deposit.
- State members who attended ACTE national events shows a list of events that your state chapter members have attended. Click 'View Registrants' to view registration details about chapter members who attended the ACTE national event or State Support Event.

To open a report, choose from the dropdown menu for the Selected Report.

Selected	Report:	Current Members	
Full Manage	Cambaina	Dashboard Queries	
Full Name	Contains	Current Members	
		Current Members (only within 30 day grace period)	
Member #	ŧ	Current Members (only within 60 day grace period)	
		Current Members (only within 90 day grace period)	
Constant of		Financial Roster	
Fina		Historical Roster	
		Lapsed Members	
		New Members (within 30 days)	
000		New Members (within 60 days)	
	1 2 3 4	New Members (within 90 days)	
Charryall	222	Renewals (within 30 days)	
<u>Show all</u>	320	Renewals (within 60 days)	
		Renewals (within 90 days)	
Id	Last Name	Roster Listings (Current) with No Email Address	
		Roster Listings with No Mailing Address	
		State members who attended ACTE national events(Activity)	
	101 Jun	State non-members who attended ACTE national events(Activity)	
50/178	<u>Abatti-</u>	State Financial Detail Report (ACH) - NEW!	
5041/0	<u>Fitzurka</u>	State members who attended ACTE national events	



Searching for Individual Records

You can also search for an individual by name or member number. You can also search for individuals by part of their name (i.e. Miller or George). This brings up individual members matching your criteria.

Selected Report:	Current Members	~
Full Name Contains		
Member #		
Find		

To get more detail on an individual, choose their name. To edit parts of the individual's profile, choose the **pencil** in the appropriate section.

To make allowal	ole changes to data, clic	k the pencil located i	n the upper right	corner of the corresponding section.	\bigcirc
Bob Smith City High School					0
Membership					
iMIS ID	000000		Major key		
Member type	ACTE Member		Status	Active	
Billing category	Professional Member		Paid through	2/29/2024	
Chapter	XXXXX		Member since	3/1/2022	
Renewed	3/28/2022		Last update	10/31/2022 9:18 AM	
Last updated by	BobSmith@gmail.com		Date added	10/4/2018	

Notice the preferred mailing, billing, and shipping is marked as either Main/Home or Work. *If the address is missing on the preferred mailing, billing or shipping address, the member will not be receiving mailed correspondence from ACTE.*



Addresses Work Home				
			 ✓ Preferred Mailing Address ✓ Preferred Billing Address ✓ Preferred Shipping Address 	
Personal det	ails	/	Social profiles	
Work phone	(111)111-1111		There are no social profiles defined.)
Mobile Phone Home phone			Relationships	
Email	BobSmith@gmail.com			

State Chapter Module Reports

Current Member Reports

Selected Report:	Current Members
Full Name Contains	Dashboard Queries Current Members
Member #	Current Members (only within 30 day grace period) Current Members (only within 60 day grace period) Current Members (only within 90 day grace period)

1. Current Members Report (includes the 90-day grace period)

The Current Members report gives you a list of all current members including those in the 90-day grace period. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information. The Current Members report can be exported as Excel, CSV, pdf, etc.

2. Current Members (only within 30-day grace period)

The Current Members (only within 30-day grace period) does not list all members but only those in the 30-day grace period (expired within 1-30 days).

3. Current Members (only within 60-day grace period)

The Current Members (only within 60-day grace period) does not list all members but shows those in the 60-day grace period (expired within 1-60 days).

4. Current Members (only within 90-day grace period)

The Current Members (only within 90-day grace period) does not list all members but shows those in the 90-day grace period (expired with 1-90 days).



State Financials

The Financial Roster is listed on the drop-down menu and shows financial transactions with dates.

1. Financial Roster



The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number). The Financial Roster report shows ALL transactions from a member including those to ACTE.

St Id	First Name Last Name Title	School/Bus Email	Description	Transaction Date	Amount Pa	Paid Thru
526412			ACTE Membership Dues	10/23/2023	\$80.00	1/31/2025
526412			ACTE Postsecondary Adult and Career Education	10/23/2023	\$0.00	1/31/2025
526412			CA-California Assn for Career & Technical Education	10/23/2023	\$29.00	1/31/2025
526412			Freight	10/20/2023	\$144.90	

2. The State Financial Detail Report

This report shows the transactions that make up the ACH deposit.

Selected Report:	State Financial Detail Report (ACH) - NEW!	~
Action		
<u>View/Print</u>		

Put in the appropriate end of month date to run the State Financial Detail Report (ACH) – NEW! and select Run Report.

Арр	ly Filters			×
	Field	Operator	Value	
	Month-End Date	Equal To		iii f×▼
		Run Report	Cancel	

The report runs as a pdf but can be exported in a spreadsheet format is needed. This report shows only the amounts paid to the state association and will match the ACH monthly deposit.

			« <	Page 1	of 2	>		Expor	Find Text Search rep	oort
State Finan	cial Detail for Month End	New and R ing 11/30/2	enewing N 023	lembers						
CA ID	Full Name Full Address	\$261.00 School Work	, Work Fax	Home Phone Email	Member Type	Division	Payment	Balance	Date Paid Pai	id Thru
538557					Profession al Member	CA-California Assn for Career & Technical Education	\$29.00		11/12/2023 10/	/31/2024
538343					Profession al Member	CA-California Assn for Career & Technical Education	\$29.00		11/7/2023 10/	/31/2024
539010					Profession al Member	CA-California Assn for Career & Technical Education	\$29.00		11/21/2023 10/	/31/2024



Historical Roster

Records can be searched by date, name, or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

Selected Report:	Historical Roster		~							
Joined After										
Full Name Contains										
Member #										
Find										
										Export +
	5 6 7 8 9 10					Page: 1	of 10 Go	Page size: 50	Change	
Show all 500										
Id Full Name	<u>Title</u>	School/Business	Email		<u>Work</u> Phone	<u>Home</u> Phone	<u>Paid</u> <u>Through</u>	Current Divisions		Address 1

Lapsed Members

Anyone in our database that has expired past the 90 grace period window will appear on this list. Search for records by dates or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

Selected Report:	Lapsed Members	~				
Paid Through Between Member #	and					
Find						Export -
1 2 3 4 Show all 500	5 6 7 8 9 10 • •		Page: 1 of 10	Go Page size: 50 C	hange	
ld <u>First Name</u>	Last Name Title	<u>School/Business</u> <u>Email</u>	Ad	<u>Idress 1</u> 2	Address 3 <u>City</u>	<u>State</u> <u>Province</u>



New Member Reports

Selected Report:	Current Members ~	
Full Name Contains	Dashboard Queries	
r uu nume contains	Current Members (only within 30 day grace period)	
Member #	Current Members (only within 60 day grace period)	
_	Financial Roster	
Find	Historical Roster	
	Lapsed Members New Members (within 30 days)	Export
	New Members (within 60 days) New Members (within 90 days)	
I I 2 3 4	Renewals (within 30 days)	Page: 1 of 10 Go Page size: 50 Change
Show all 500	Renewals (within 60 days)	
First	Roster Listings with No Email Address	Address Address State
Last Name Name	Roster Listings with No Mailing Address	Address 1 2 3 City Province
	State members who attended ACTE national events	

1. New Members (within 30 days)

The New Members report gives you a list of all new members who have joined in the last 30 days. You can quickly see several columns of information (you may need to use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

2. New Members (within 60 days)

The New Members report gives you a list of all new members who have joined in the last 60 days. This list is inclusive and includes all new members who joined in the past 1-60 days. You can quickly see several columns of information (you may need use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

3. New Members (within 90 days)

The New Members report gives you a list of all new members who have joined in the last 90 days. This list is inclusive and includes all new members who joined in the past 1-90 days. You can quickly see several columns of information (you may need to use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.



Renewal Reports

Selected Report:	Current Members	v
	Dashboard Queries	
Full Name Contains	Current Members	
	Current Members (only within 30 day grace period)	
Member #	Current Members (only within 60 day grace period)	
_	Financial Roster	
Find	Historical Roster	
	Lapsed Members	
	New Members (within 30 days)	
	New Members (within 60 days)	
H 1 2 3 4	Renewals (within 30 days)	Page: 1 of 10 Go Page size: 50 Change
	Renewals (within 60 days)	
now all 500	Renewals (within 90 days)	
First	Roster Listings with No Email Address	Address Address Stat
Last Name Name	Roster Listings with No Mailing Address	Address 1 City Pro
	State members who attended ACTE national events	

1. Renewals (within 30 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **30** days.

Transaction	Transaction		Paid
Date	Туре	Join Date	Through
		8/1/2016	
8/8/2022	DIST	0:00	7/31/2022
		7/1/2022	
7/20/2022	DIST	0:00	6/30/2023
		7/1/2017	
8/4/2022	DIST	0:00	6/30/2023
		7/1/2022	
7/27/2022	DIST	0:00	6/30/2023
		9/1/2008	
7/25/2022	DIST	0:00	9/30/2023
		7/1/2022	
7/25/2022	DIST	0:00	6/30/2023
		9/1/2016	
8/2/2022	DIST	0:00	8/31/2023
		7/1/2017	
7/12/2022	DIST	0:00	6/30/2023
		7/1/2022	
7/25/2022	DIST	0:00	6/30/2023

2. Renewals (within 60 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **60** days.

Transaction		Paid
Туре	Join Date	Through
	8/1/2016	
DIST	0:00	7/31/2022
	3/1/2017	
DIST	0:00	5/31/2023
	8/1/2016	
DIST	0:00	5/31/2023
	7/1/2017	
DIST	0:00	6/30/2023
	9/1/2008	
DIST	0:00	9/30/2023
	9/1/2016	
DIST	0:00	8/31/2023
	8/1/2016	
DIST	0:00	7/31/2023
	12/3/2020	
DIST	0:00	5/31/2023
	7/1/2017	
DIST	0:00	6/30/2023
	6/1/2022	
DIST	0:00	5/31/2023
	Transaction Type DIST DIST DIST DIST DIST DIST DIST DIST	Transaction Type Join Date B/1/2016 8/1/2017 DIST 0:00 B/1/2017 8/1/2016 DIST 0:00 JST 0:00 B/1/2017 0:00 DIST 0:00 9/1/2008 9/1/2008 DIST 0:00 B/ST 0:00 B/ST 0:00 DIST 0:00

3. Renewals (within 90 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **90** days.

Transaction	Transaction		Paid
Date	Туре	Join Date	Through
		4/1/2021	
5/11/2022	DIST	0:00	3/31/2023
		8/1/2016	
8/8/2022	DIST	0:00	7/31/2022
		3/1/2017	
6/27/2022	DIST	0:00	5/31/2023
		8/1/2016	
6/23/2022	DIST	0:00	5/31/2023
		7/1/2017	
8/4/2022	DIST	0:00	6/30/2023
		9/1/2008	
7/25/2022	DIST	0:00	9/30/2023
		9/1/2016	
8/2/2022	DIST	0:00	8/31/2023
		7/1/2016	
5/28/2022	DIST	0:00	6/30/2023
		5/1/2021	
5/27/2022	DIST	0:00	4/30/2023
		2/9/2021	
5/30/2022	DIST	0:00	5/31/2023
		8/1/2016	
7/5/2022	DIST	0:00	7/31/2023
		12/3/2020	
6/29/2022	DIST	0:00	5/31/2023
		6/1/2020	
5/16/2022	DIST	0:00	5/31/2023
		7/1/2017	
7/12/2022	DIST	0:00	6/30/2023



Missing Member Information Reports

1. Roster Listing with No Email Address

Selecte	d Report:	Roster Listings with No Email Add	ress 🗸						
Membe	r#								
Find									
									Export -
Show all	1 2 3 4 9 500	5 6 7 8 9 10 +		Page: 1 of 10 Go	Page size: 50	Change			Item 1 to 50 of 500
ld	<u>Full Name</u>	Company.	Address 1	Address 2	<u>Address</u> 3	<u>City</u>	<u>State</u> Province	Zip	Address Purpose

This report shows a list of members who have no email address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.

2. Roster Listing with No Mailing Address

Selecte	d Report:	Roster Listings with No Mailin	g Address	•							
Member Find	r#										
											Export +
ld	<u>Full Name</u>	<u>Company</u>	Email		Address 1	Address 2	<u>Address</u> 3	<u>City</u>	<u>State</u> <u>Province</u>	Zip	Address Purpose

This report shows a list of members who have no mailing address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.



Member Event Activity Reports

Chapter-Sponsored Event Dashboards

Chapter-Sponsored Event Dashboards

In some instances, ACTE manages registration for a state event. In those cases a dashboard with event information is created and accessible through the SCM.

ACTE CHAPTER ADMINISTRATION	BACK TO ACTEONLINE.ORG	CONTACT US	
ACTE Chapter Administration » My ACTE Chapters » Chapter Management			Export +
Event	<u>Begir</u>	Date	End Date
CTE Summer Leadership Conference	08/0	2/2021	08/03/2021
CTE Summer Leadership Conference - 2022	08/0	3/2022	08/05/2022
Classroom Management Tips and Resources	09/1	6/2021	
New CTE Teacher Workshop	10/13	/2021	10/13/2021
Michigan Workshop	11/17	/2020	11/17/2020

The Dashboard Tab gives you a breakdown of registration types.

Dashboard	Registrants	Registrant Details			
Michiga	n Worksh	ор			
11/17/2020					
			Registrants by	v type	Registrants by type
			I <u>ype</u>	Registrants	
			ACTE Member	4	
			Non-member	84	
					ACTE Member — Non-member





The Registrants Tab lists all who registered for the event which includes members and nonmembers.

Dashboard Re	egistrants Registrant Details			
Event Regist	rants			
				Export +
	4 • •	Page: 1 of 4 Go Page size: 25 Change		Item 1 to 25 of 100
Show all 100				
Registrant	Organization	Title	Email	Date registered



State Members Who Attended ACTE National Events

For ACTE National Events prior to CareerTech VISION 2023, this information is available in the reports **State members** who attended **CTE national events** & **State non-members who attended ACTE national events**.

For ACTE National Events (CareerTech VISION 2023 to current), this information is available in the reports **State** members who attended ACTE national events (Activity) & **State non-members who attended ACTE national events** (Activity).

Selected I	Report:	Current Members	~
Full Name	Contains	Historical Roster Lapsed Members New Members (within 30 days)	
Member #	•	New Members (within 60 days) New Members (within 60 days)	
Find		Renewals (within 30 days) Renewals (within 60 days)	
		Renewals (within 90 days) Roster Listings (Current) with No Email Address	
4 4	1 2 3 4	Roster Listings with No Mailing Address State members who attended ACTE national events(Activity)	
Show all	<u>328</u>	State non-members who attended ACTE national events(Activity) State Financial Detail Report (ACH) - NEW!	
<u>ld</u>	Last Name	State members who attended ACTE national events State non-members who attended ACTE national events Areas of Interest Rosters	
504178	<u>Abatti-</u> <u>Fitzurka</u>	Current Members - Arts, Media and Entertainment Current Members - eSports Current Members - IT Current Members - Marketing	, ia

The final report on the drop-down menu is the ACTE National Event registrants from your state.

Selected Report:	State members who attended ACTE national events(Activity)	~	Export +
Date	ACTE National Event	Number of attendees	Click to view registrants
12/1/2023	CareerTech Vision and Expo 2023	104	View Registrants

Selected Report:	State members who attended ACTE national events $~~$ \sim		
			Export -
	Page: 1 of 2 Go Pag	je size: 50 Change	Item 1 to 50 of 81
Show all 81			
<u>Date</u>	ACTE National Event	Number of attendees	Click to view registrants
12/1/2022	2022 ACTE CareerTech Expo - Las Vegas, NV	1	View Registrants
11/30/2022	CareerTech Vision and Expo 2022	11	View Registrants
10/16/2022	Alaska ACTE PDC: Growing Stronger Together 2022	1	View Registrants
9/28/2022	2022 Best Practices and Innovations Conference	1	View Registrants
6/9/2022	Butler Tech Good Trouble: Busting IAED Barriers in CTE	1	View Registrants
4/28/2022	2022 ACTE-Utah Work-Based Learning Conference	2	View Registrants
3/21/2022	National Policy Seminar 2022	11	View Registrants
12/1/2021	CareerTech Vision and Expo 2021	84	<u>View Registrants</u>
9/30/2021	2021 Best Practices and Innovations Conference	3	View Registrants
9/24/2021	2021 Hybrid Region II Leadership Conference	9	View Registrants
9/23/2021	IN ACTE Conference 2021 Sponsorship	1	View Registrants

To see list of registrants, choose View Registrants.

CareerTech Vision and Expo 2023									
								Export -	
<u>First</u> <u>Name</u>	<u>Last</u> Name	<u>Title</u>	<u>Company</u>	Email	<u>Phone</u>	<u>Registration</u> <u>Date</u>	<u>Total</u> <u>Charges</u>	<u>Total</u> Payme	

This gives you a report of everyone from your state who has registered for the national event including the amount paid, date paid, and all individual details.



Export options

When you have run a report, you can export the information as Word, Excel, PDF, CSV, or XML.

Selected Re	eport:	Current Memb	ers	~					
Full Name (Contains								
Member #									
Find									
									Export
H 4 1	2 3 4 5	• •				Page: 1 of 5	Go Page siz	e: 50 Chang	Word
how all 234									X Excel
ld I	Last Name F	First Name	Title	School/Business	Email	Address 1	Address 2	Address 3	
			1						ML ML

The Word export -

Id	Last Name	<u>First</u> Name	<u>Title</u>	School/Business	Email

The **Excel export** brings up a warning message.

			Microsoft Excel				×	
The file format and extension of ResultsGrid_ExportData - 2022-08-08T212049.259.xts' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyw								
1	А	В	С	D	E	F	G	
1	ld	Last Name	First Name	Title	School/Business	Email	Address 1	
				Instruction Descurse and Cluster			1	

The **PDF export** gives you a non-editable document.

Id	Last	First	Sähle	ol/Bus	Enes)	ddre	ddre	ddres	City	State	ZipA	ddre	Work	Home
	Name	Name			4	1	2	3	P	rovin	e P	urpo	thone	Phoife

The **CSV export** is the recommended option for exporting reports.

1 Id Last Name First Name Title School/Bu Email Address 1 Address 2 Address 3 City State Prov Zip Address P Work Pho Home Pho Paid Through

The **XML export** brings up an error.



Spreadsheet Filters, Text Filters, and Sort Functions

To widen a column in a CSV export, double click on the line between the columns (E and F).



By clicking on the top left space, you can quickly highlight the entire spreadsheet. This enables you to choose Filter for all columns and rows of the spreadsheet.

AutoSave 🦲	☞ ▤ ७・৫ ፣	ResultsGr	id_ExportData - 2022-08-08T21395	6.872 🗸			
File Hom	ne Insert Page Layo Page Layo pommended Table pictures ables	ut Formulas Data	Review View Help artArt eenshot ×	Acrobat Visio Data Visualizer Add-ins	Recommended Charts	Haps PivotChart	3D Map ~ Tours
	× × ≮ A	B	С	D	E	F	
1	d	Last Name	First Name	Title	School/	Email	Ad

The Sort function can be used by choosing the column title you want to sort by and then choose ascending or descending.

File Home Insert Page Layout Forn	nulas Data Review View	Help Acrobat			1	Comments	🖻 Share
☐ From Text/CSV ☐ Recent Sources Get ☐ From Web ☐ Existing Connections Data ~ ☐ From Table/Range	Refresh E Properties All ~ E Edit Links	Stocks Geography 👻	2↓ ZA Filter Sort Sort Filter Grapply Filter Grapply	Text to Columns So *	f Forecast Sheet	回日 Group ~ 呵日 Ungroup ~ 臣田 Subtotal	+1) -11
Get & Transform Data	Queries & Connections	Data Types	Sort & Filter	Data Tools For	recast	Outline	<u>م</u>

To sort by multiple columns, choose the sort option.

File Home Insert Page Layout For	mulas Data Review View	Help Acrobat				🖓 Comments 🛛 🖻 Share
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Filter function is under the dropdown Data menu.

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When the Filter function is on, the **Sort option** is listed in the Filter drop down menu.

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Text filter is an option under the filter function.





Division Report

To create a report with certain Divisions, export the total roster to Excel or CSV. Open filter on your report and choose **text filter** on Current Divisions field.

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To find members in the Business Division that are also in Work-Based Learning, use the options under Text Filter (And, Or, Contains, Does not Contain, etc.) to pull your specific list of members in ACTE Divisions/Sections column.

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C D E F 1 Title * Email * Address * # # # #	G H I J K L M N ess City State Pr(Zip Address Work PI Home PI Paid Throu Savannah GA 31419 WORK (912) 395-: 8/31/202 Custom AutoFilter Show rows where: Current Divisions Contains Work-Based Learning @ And O Qr Contains Business Use ? to represent any single character Use * to represent any series of characters	O P Current Divisions T 2 ACTE Business Education Divisio ? × OK Cancel ACTE Business Education Divisio	Q ACTE Work-Bass ¢ ACTE Work	R ed Learning ed Learning
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Spreadsheet Grouping, Subtotals, and Grand Totals

Financial Roster Reports

This will run a report for all transactions run between dates.

Transaction Date				
Between	7/1/2022	and 🛄	8/31/2022	
Member #				

Choose the select all to highlight all rows and columns. Turn on the filter for the report.

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At this point, it is important to sort your data by the appropriate field (usually the email field to keep individual's records together).



From the Data menu, choose outline and then subtotal.

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13	Kizzy	Bess												6/7/2022	\$8.75									
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If you didn't sort before running subtotals, you are able to remove this calculation and redo after sorting by choosing Remove All button.

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To find totals by individual, choose the following within the Subtotal menu.

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This will give you subtotals by individual -

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Choosing the #2 in the upper left corner will collapse the details and give you the amount that was paid by each individual.

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