



e-ER Planner

Donation Manager

Donation Reports User Guide

Version 5.0 Beta 6



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Introduction

This user guide aims at giving you the information required to work with “Reports Section” of “Donation Manager”. This user guide can be downloaded from “Donation Reports Help” screen shown in **Figure 2** which is accessible from “Reports → Help” menu as shown in **Figure 1**.

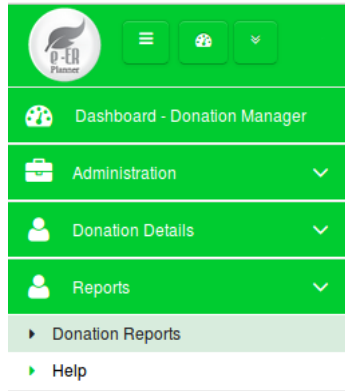


Figure 1

Donation Reports Help

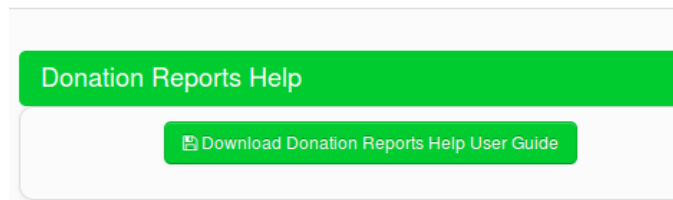


Figure 2

Top Navigation Bar

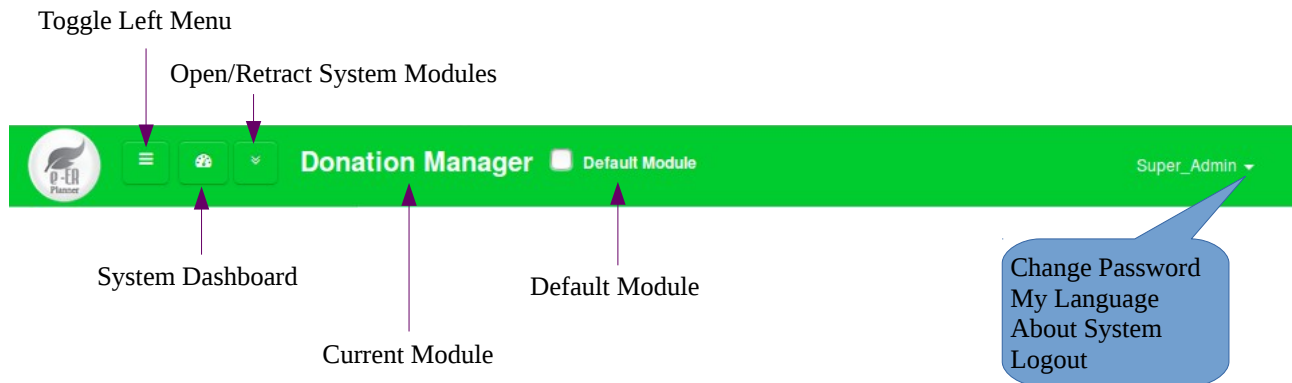


Figure 3

- **Toggle Left Menu** : Show/hide left menu
- **Open/Retract System Modules** : Open/retract system module dashboard. Previous screen preserves if user does not select any module.
- **System Dashboard** : Opens the system modules dashboard. Previous screen does not preserved.
- **Current Module** : Shows the current module that user has selected.
- **Default Module** : Selecting current module as default module will allow to go directly to that module on login to the system.



Donation Reports

Donation Reports allows users to filter information of Donations received and to search Program Progress details. **Figure 4** shows a list of reports available under Donations Reports.

Donation Reports

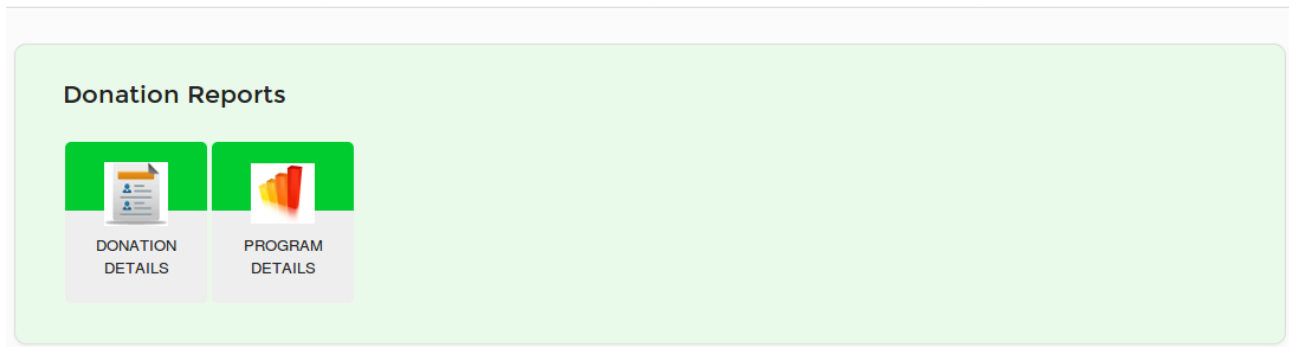


Figure 4



Donation Details

Upon selecting “Donation Details” report from reports list shown in **Figure 4**, users can see a list of search filters available as shown in **Figure 5**.

- Without specifying any value for search filters, users can search information and system will show all Donations records.
- If users select a specific Program, the Location of the Program will be automatically selected and users cannot change Location.
- When searched, users can see report results as shown in **Figure 6**.
- Further users can print the report details.

Donation Details

From Date:

To Date:

Program:

Location:

Figure 5

Donation Details : As Of 2018-08-17 10:10:20am

10 records per page

Search:

Donor	Program Name	Location	Reference Number	Date	Amount
Abby Cerys Rubinek	Entrance Road Construction Program	Headquarters	123	2018-08-11	3,500.00
Iona Fisher	Entrance Road Construction Program	Headquarters	345	2018-08-11	1,500.00
Jonathan MacDonell	Entrance Road Construction Program	Headquarters	234	2018-08-11	4,000.00

Showing 1 to 3 of 3 entries

Donation Summary Details

Donation Grand Total

9,000.00

Figure 6



Program Details

Upon selecting “Program Details” report from reports list shown in **Figure 4**, users can see a list of search filters available as shown in **Figure 7**.

- Without specifying any value for search filters, users can search information and system will show all Programs detail as shown in **Figure 8**. Further, users can see Total Fund Available, Total Budget Estimated, Budget Deficiency Total, Activity Cost Total and Budget Variance Total for all projects.
- If users select a specific Program, the Location of the Program will be automatically selected and users cannot change Location.
- When searched by specifying a Program, users can see Program Activity details, Program Budget information and Program Progress information as shown in **Figure 9**.
- Further users can print the report details.

Program Details

Program: -- Select -- Location: -- Select -- Search

Print

Figure 7

Program Details : All Programs of All Locations

10 records per page Search:

Program Name	Location	Fund Available	Budget Estimated	Budget Deficiency	Activity Cost Total	Overall Budget Variance
Entrance Road Construction Program	Headquarters	0.00	72,000.00	72,000.00	8,000.00	0.00

Showing 1 to 1 of 1 entries - Previous 1 Next -

Program Summary Details

Total Fund Available	Total Budget Estimated	Budget Deficiency Total	Activity Cost Total	Budget Variance Total
0.00	72,000.00	72,000.00	8,000.00	0.00

Print

Figure 8

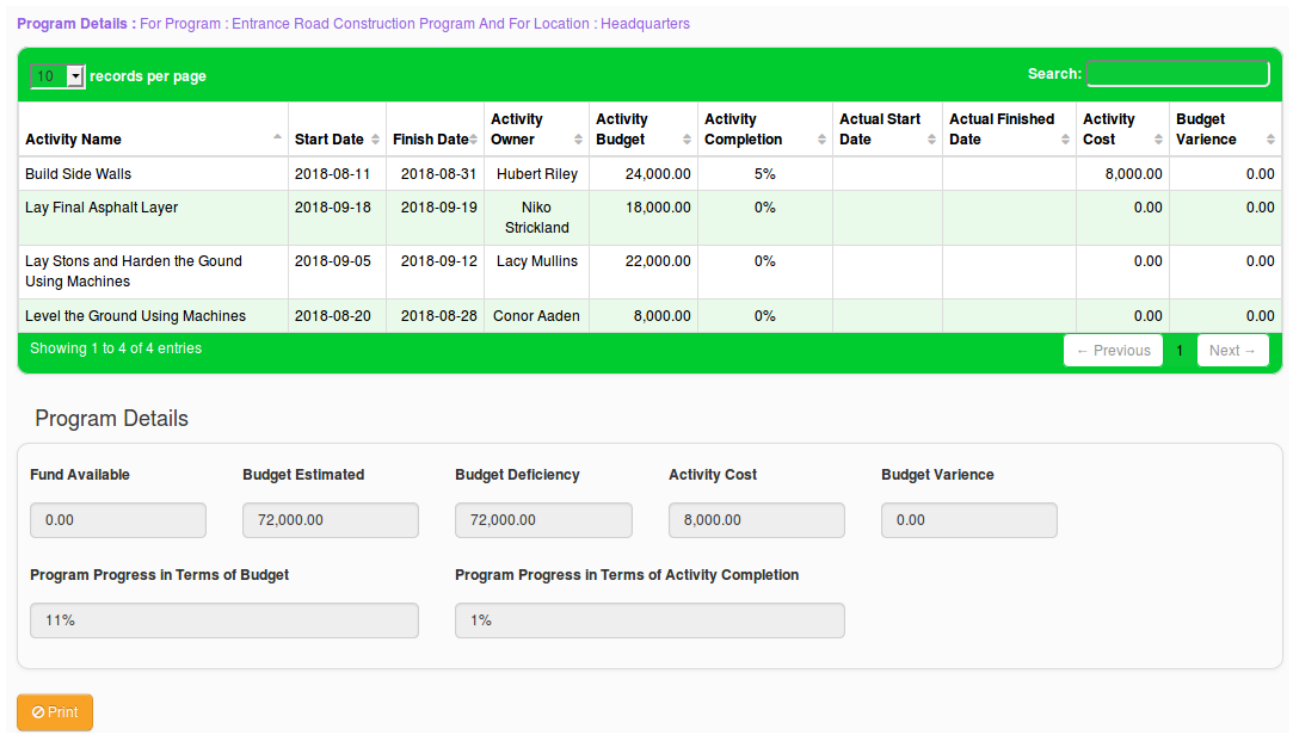


Figure 9