



e-ER Planner

Donation Manager

Admin 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 “Administration Section” of “Donation Manager”. This user guide can be downloaded from “Admin Help” screen shown in **Figure 2** which is accessible from “Administration → Help” menu as shown in **Figure 1**.

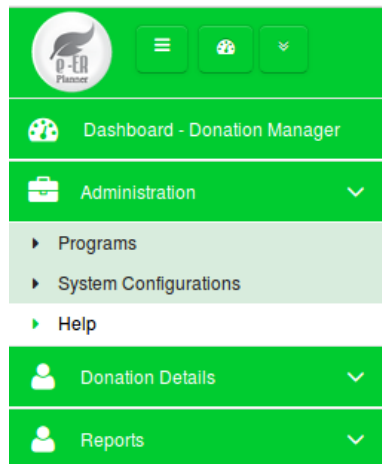


Figure 1

Admin Help

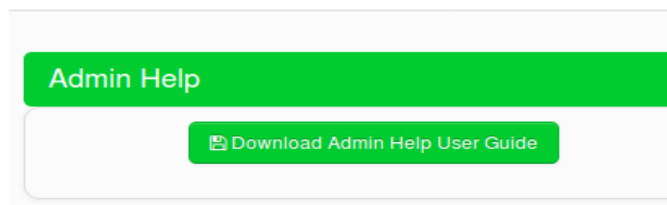


Figure 2

Top Navigation Bar

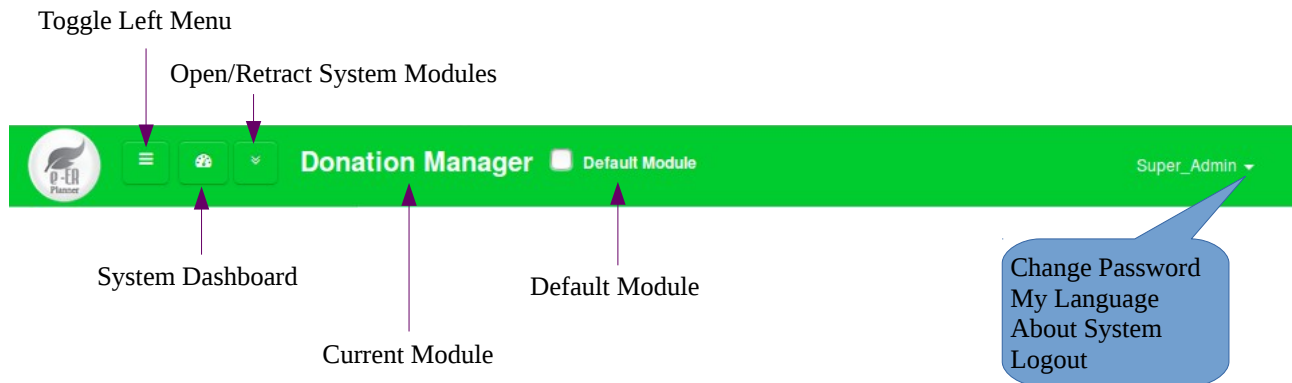


Figure 3

- **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.

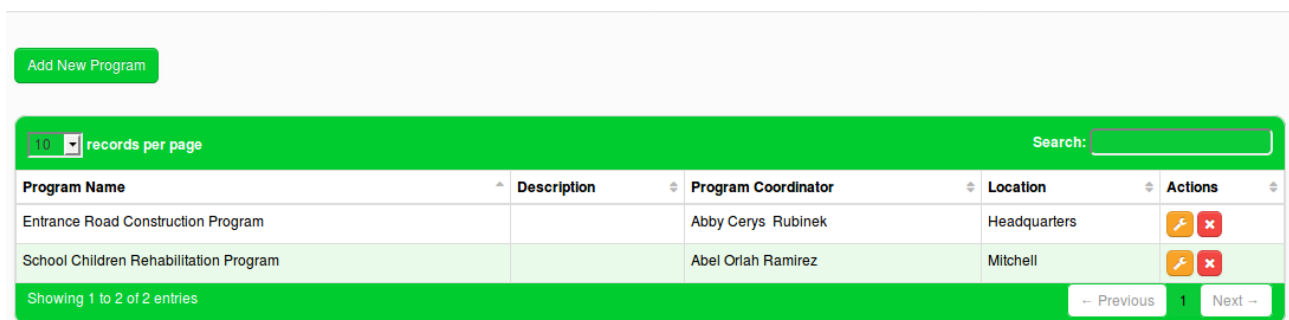


Programs

Programs which you execute using the donations you receive need to be added under Programs screen. Programs can be added in the system from “Administration → Programs” menu.

- Programs list is displayed in the system as shown in **Figure 4**.
- A new program can be added by clicking on “Add New Program” button shown in **Figure 4**. A new form will be displayed on the screen to add a new Program as shown in **Figure 5**.
- “Program Name”, “Coordinator Name” and “Location” are mandatory fields when adding a new Program.

Program Details

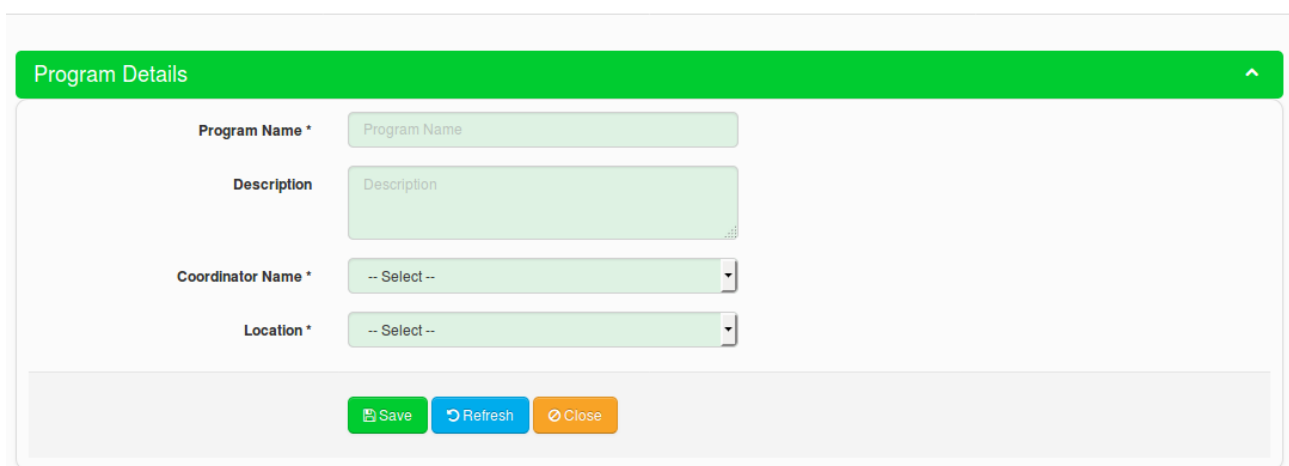


The screenshot shows the 'Programs' management interface. At the top left is a green 'Add New Program' button. Below it is a green header bar containing a dropdown menu set to '10 records per page' and a search input field. The main area is a table with the following columns: Program Name, Description, Program Coordinator, Location, and Actions. There are two data rows: 'Entrance Road Construction Program' coordinated by 'Abby Cerys Rubinek' at 'Headquarters', and 'School Children Rehabilitation Program' coordinated by 'Abel Orlah Ramirez' at 'Mitchell'. Each row has edit and delete icons in the Actions column. At the bottom, it says 'Showing 1 to 2 of 2 entries' with navigation links for 'Previous', '1', and 'Next'.

Program Name	Description	Program Coordinator	Location	Actions
Entrance Road Construction Program		Abby Cerys Rubinek	Headquarters	
School Children Rehabilitation Program		Abel Orlah Ramirez	Mitchell	

Figure 4

Program Details



The screenshot shows the 'Program Details' form. It has a green header bar with the title 'Program Details' and an upward arrow. The form contains four fields: 'Program Name *' (text input), 'Description' (text area), 'Coordinator Name *' (dropdown menu), and 'Location *' (dropdown menu). At the bottom, there are three buttons: 'Save' (green), 'Refresh' (blue), and 'Close' (orange).

Program Name *

Description

Coordinator Name *

Location *

Figure 5

System Configurations

System allows users to control the system behavior via several system configurations. System configurations screen is shown in **Figure 6**, which is accessible from “Administration → System Configurations” menu.

System configurations are categorized into their effective screens as shown in **Figure 6**.

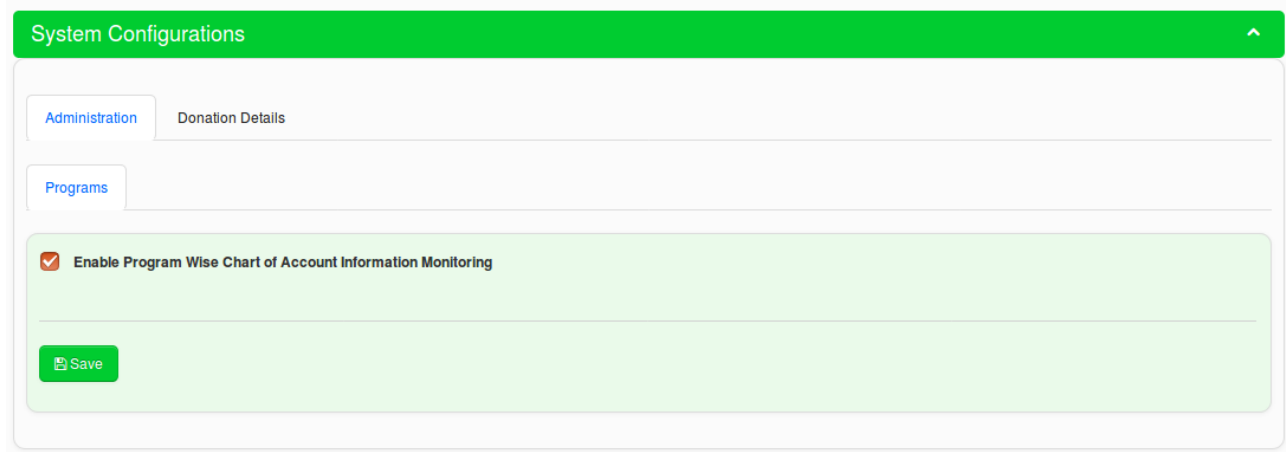


Figure 6

Programs Configurations

System configurations applicable for Programs in Donation Manager module are categorized under “Programs” tab which is available under main “Administration” tab as shown in **Figure 6**.

- Users can specify whether they need to track accounting information for each program in separate chart of accounts or in a common chart of account in Accounts Manager module. The configuration called “Enable Program Wise Chart of Account Information Monitoring” shown in **Figure 6** is available for this purpose.



Collect Donations Configurations

System configurations available for Collect Donations screen are categorized under the “Collect Donations” tab which is available under “Donation Details” main tab as shown in **Figure 7**.

- If users have enabled “Enable Program Wise Chart of Account Information Monitoring” configuration under Programs configuration tab shown in **Figure 6**, users can select a prime entry book for each Program as shown in **Figure 7** to add journal entries for each donation collect transaction.
- If users have not enabled “Enable Program Wise Chart of Account Information Monitoring” configuration under Programs configuration tab shown in **Figure 6**, then users can select a common prime entry book for all Programs as shown in **Figure 8** to add journal entries for each donation collect transaction.

System Configurations

Administration Donation Details

Collect Donations Program Progress

Select prime entry book/s for account transactions for each program

Program Name	Accounts Prime Entry Book	
-- Select --	-- Select --	
Entrance Road Construction Program	Collect a Donation for Entrance Road Construction Program	Delete
Ciolor Wash Administration Building	Collect a Donation for Ciolor Wash Administration Building	Delete

Save

Figure 7



System Configurations

Administration

Donation Details

Collect Donations

Program Progress

Select prime entry book/s for account transactions

Accounts Prime Entry Book

-- Select --

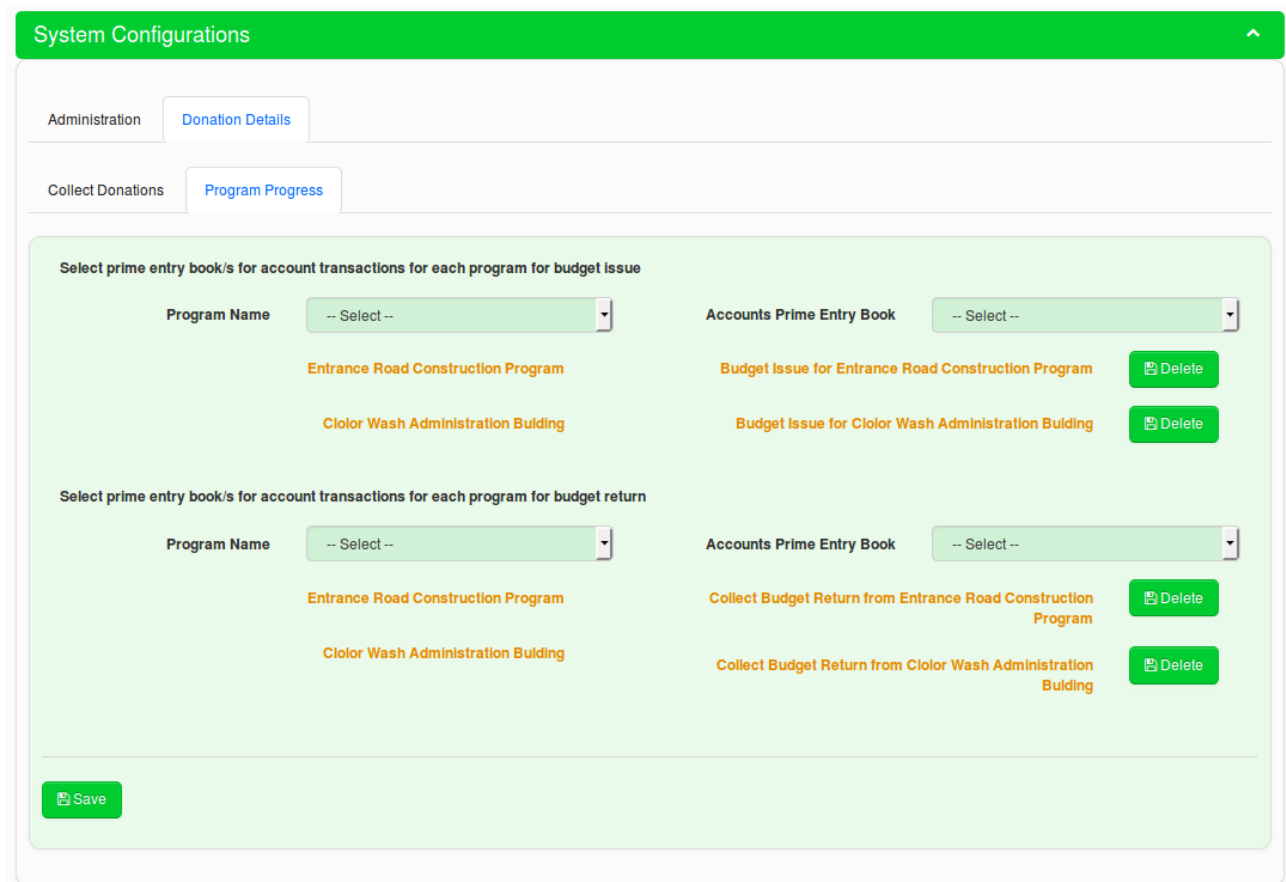
Save

Figure 8

Program Progress Configurations

System configurations available for Program Progress screen are categorized under the “Program Progress” tab which is available under “Donation Details” main tab as shown in **Figure 9**.

- If users have enabled “Enable Program Wise Chart of Account Information Monitoring” configuration under Programs configuration tab shown in **Figure 6**, users can select a prime entry book for each Program as shown in **Figure 9** to add journal entries for each budget issue or budget return transaction.
- If users have not enabled “Enable Program Wise Chart of Account Information Monitoring” configuration under Programs configuration tab shown in **Figure 6**, then users can select a common prime entry book for all Programs as shown in **Figure 10** to add journal entries for each budget issue or budget return transaction.



System Configurations

Administration **Donation Details**

Collect Donations **Program Progress**

Select prime entry book/s for account transactions for each program for budget issue

Program Name	Accounts Prime Entry Book	
-- Select --	-- Select --	
Entrance Road Construction Program	Budget Issue for Entrance Road Construction Program	Delete
Clolor Wash Administration Building	Budget Issue for Clolor Wash Administration Building	Delete

Select prime entry book/s for account transactions for each program for budget return

Program Name	Accounts Prime Entry Book	
-- Select --	-- Select --	
Entrance Road Construction Program	Collect Budget Return from Entrance Road Construction Program	Delete
Clolor Wash Administration Building	Collect Budget Return from Clolor Wash Administration Building	Delete

[Save](#)

Figure 9



System Configurations

Administration

Donation Details

Collect Donations

Program Progress

Select prime entry book/s for account transactions for program budget issue

Accounts Prime Entry Book -- Select --

Select prime entry book/s for account transactions for program budget return

Accounts Prime Entry Book -- Select --

Save

Figure 10