



# **e-ER Planner**

## **Donation Manager**

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

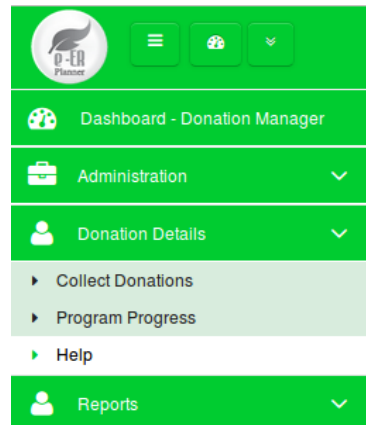


Figure 1

## Donation Help

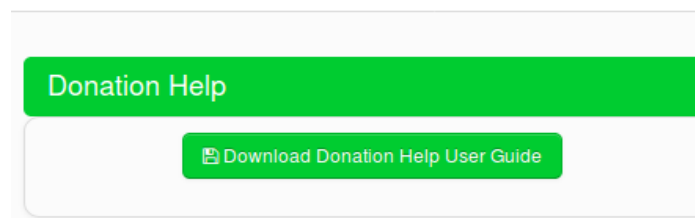


Figure 2

## Top Navigation Bar

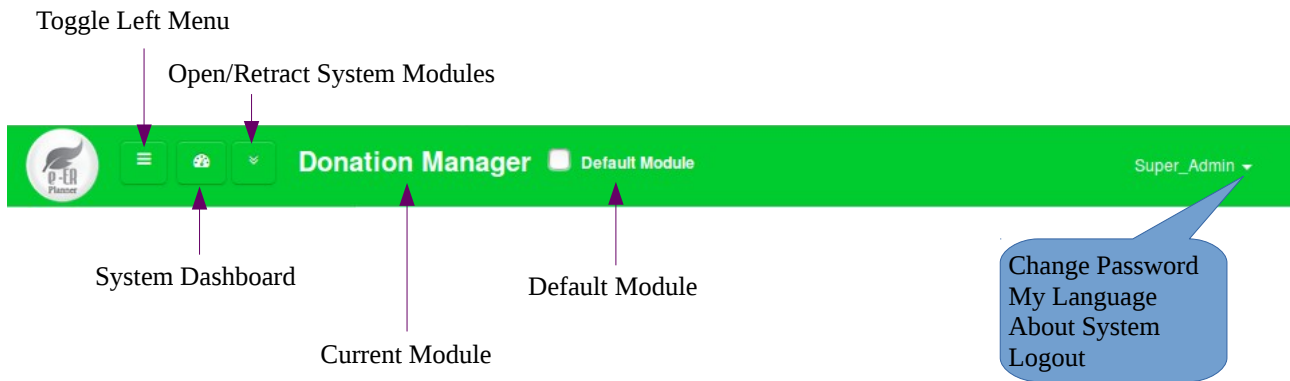


Figure 3

- **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.



## Collect Donations

All Donations you receive for a particular program can be added in Collect Donations screen. Collect Donations screen can be accessed from “Donation Details → Collect Donations” menu.

- Donations list is displayed in the system as shown in **Figure 4**.
- A new Donation can be added by clicking on “Add New Donation” button shown in **Figure 4**. A new form will be displayed on the screen to add a new Donation as shown in **Figure 5**.
- “Reference Number”, “Program Name”, “Date”, “Donor” and “Amount” are mandatory fields when adding a new Donation.

### Collect Donations

Add New Donation







10 records per page							Search: <input type="text"/>	
Date	Reference No	Program Name	Program Coordinator	Donor	Amount	Actions		
2018-08-11	123	Entrance Road Construction Program	Maisie Clark	Abby Cerys Rubinek	3,500.00	 		
2018-08-11	234	Entrance Road Construction Program	Maisie Clark	Jonathan MacDonell	4,000.00	 		
2018-08-11	345	Entrance Road Construction Program	Maisie Clark	Iona Fisher	1,500.00	 		
Showing 1 to 3 of 3 entries							← Previous	1 Next →

Figure 4

### Donation Details

Reference Number \*

Reference Number

Program Name \*

-- Select --

Date \*

2018-08-16




Donor \*

-- Select --

Amount \*

Amount

 Save

 Refresh

 Close

Figure 5

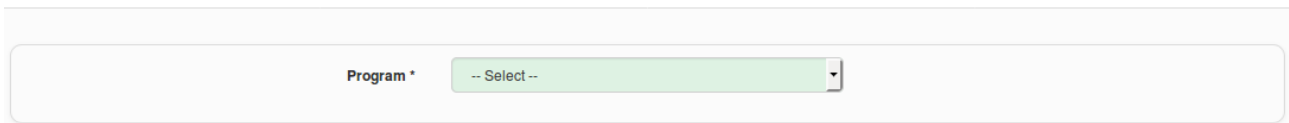


## Program Progress

Progress of each program can be seen on Program Progress screen which is accessible from “Donation Details → Program Progress” menu.

- Users need to select a Program on the screen shown in **Figure 6** to see the Program Progress.

### Program Progress

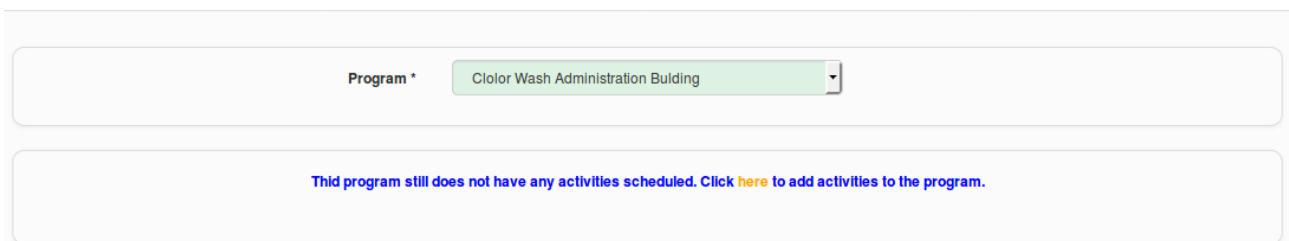


The screenshot shows a web interface for the Program Progress screen. It features a light gray background with a white rounded rectangle containing a label "Program \*" and a green dropdown menu with the text "-- Select --".

**Figure 6**

- If the selected Program is not yet configured, system will show a message as shown in **Figure 7**. Users can configure the Program by adding Program Activities by clicking on the link ([here](#)) shown in **Figure 7**. The system will show a new screen as shown in **Figure 8** to add Program Activities.

### Program Progress



The screenshot shows the Program Progress screen with the dropdown menu now displaying "Clolor Wash Administration Bulding". Below the dropdown, a blue message states: "Thid program still does not have any activities scheduled. Click [here](#) to add activities to the program."

**Figure 7**







- “Activity Name”, “Start Date”, “Finish Date”, “Activity Owner” and “Activity Budget” are mandatory fields when adding a new Program Activity.

The screenshot shows a web application window titled "Program Activity Details" with a green header bar. Inside the window, there is a green button labeled "Add Program Activity" with an upward arrow. Below this button is a form with five fields, each with an asterisk indicating it is mandatory: "Activity Name \*" with a text input field containing "Activity Name"; "Start Date \*" with a date input field containing "2018-08-16" and a calendar icon; "Finish Date \*" with a date input field containing "2018-08-16" and a calendar icon; "Activity Owner \*" with a dropdown menu showing "-- Select --"; and "Activity Budget \*" with a text input field containing "Activity Budget". At the bottom of the form is a green "Save" button with a document icon. In the bottom right corner of the window is an orange "Close" button.

Figure 8



- After adding the first Program Activity, users can see the Program Activity details on the table shown in **Figure 9**.
- New Program Activities can be added by clicking on “Add New Activity” button shown in **Figure 9**.
- An existing Program Activity can be edited by clicking on  button shown in **Figure 9**. A new screen will be shown on the screen to edit the Program Activity details as shown in **Figure 10**.
- Money can be issued for a Program Activity by clicking on  button shown in **Figure 9**. A new screen will be shown on the screen to add budget issue details as shown in **Figure 11**.
- Money returns for a Program Activity can be collected by clicking on  button shown in **Figure 9**. A new screen will be shown on the screen to add budget return details as shown in **Figure 12**.
- Program Activity progress can be updated by clicking on  button shown in **Figure 9**. A new screen will be shown on the screen to update the Program Activity progress as shown in **Figure 13**.
- Users can see the following summary information for a Program as shown in **Figure 9**.
  - Fund Available (**The total amount of Donations received for the Program**)
  - Budget Estimated (**Total Activity Budget**)
  - Budget Deficiency (**Shows the difference if Budget Estimated is greater than Fund Available**)
  - Activity Cost Total
  - Overall Budget Variance (**Shows the difference if Activity Cost Total is greater than Budget Estimated**)
  - Program Start Date
  - Program Finish Date
  - Actual Program Start Date
  - Actual Program Finished Date
- Further, users can see the following Program Progress information in the section called “Program Progress Status” section as shown in **Figure 9**.
  - Program Progress in terms of budget (**Percentage ratio of Activity Cost Total and Budget Estimated**)
  - Program Progress in terms of activity completion (**The average percentage of Activity Completion of all Program Activities**)



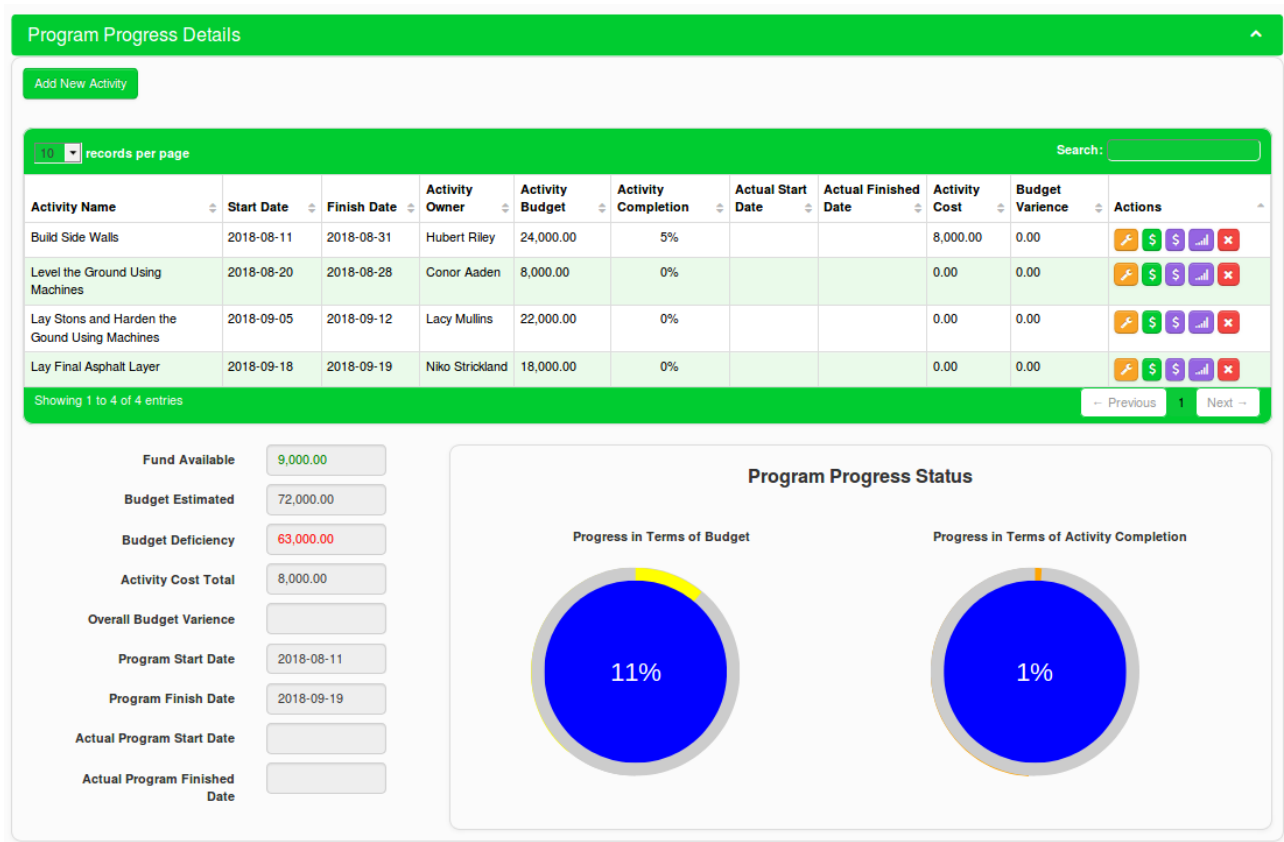


Figure 9



- When editing Program Activity details, users can update “Actual Start Date” and “Actual Finished Date” of each Program Activity as shown in **Figure 10**.

Program Activity Details

Add Program Activity

Activity Name \* Build Side Walls

Start Date \* 2018-08-11

Finish Date \* 2018-08-31

Activity Owner \* Hubert Riley

Activity Budget \* 24000.00

Actual Start Date Actual Start Date

Actual Finished Date Actual Finished Date

Save

Close

**Figure 10**



- Users can add Program Activity budget issue details on the screen shown in **Figure 11**.
- Users can click on “Add New Budget Issue” button shown in **Figure 11** to add a new budget issue transaction.

Program Activity Budget Issue Information

Program Activity Budget Issue

Reference Number \*

Reference Number

Date \*

2018-08-16

Budget Issue Amount \*

Budget Issue Amount

Save

Close

Add New Budget Issue

Activity Name : Build Side Walls

10 records per page

Search:

Reference Number	Date	Amount	Actions
123	2018-08-11	8,000.00	<div></div> <div></div>

Showing 1 to 1 of 1 entries

Previous

1

Next

Close

Figure 11



- Users can add Program Activity budget return details on the screen shown in **Figure 12**.
- Users can click on “Add New Budget Return” button shown in **Figure 12** to add a new budget return transaction.

Program Activity Budget Return Information

Program Activity Budget Return

Reference Number \*

Reference Number

Date \*

2018-08-16

Budget Return Amount \*

Budget Return Amount

Save

Close

Add New Budget Return

Activity Name : Build Side Walls

10 records per page

Search:

Reference Number	Date	Amount	Actions
No data available in table			

Showing 0 to 0 of 0 entries

Previous

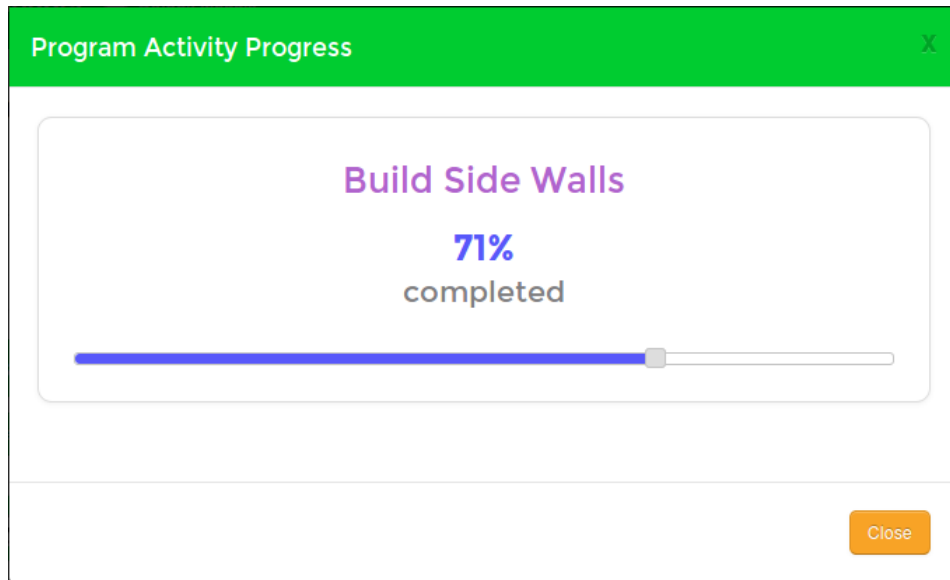
Next

Close

Figure 12



- Users can drag the slider bar shown in **Figure 13** to update the Program Activity progress.



**Figure 13**