

Standard Coding and Naming Conventions

Here is the [standard](#), please refer to that, first.

Domain-Specific Naming Conventions and Definitions

Donors

A person that is stored within the system, and is linked to any donations they may have made. Donors are defined by Name, Email, Phone number, Type of Donor (Individual, Corporation, Charity, Other), Category of Donor (big donor, company, potentially big donor), and Automatically generated Donor number. As well, keep Receipt Frequency preferences (annually or each time they donate). Donors are linked to every donation they have made. Donors may also have additional information, such as notes, primary language, or other details.

Donation

A single payment to an NFP (not for profit), linked to exactly one donor, and part of exactly one batch. Donations that are part of a **posted** batch are **closed** and can no longer be modified in any way, even if they are erroneous. Donations are defined by date of payment, donor, batch, status (open or closed), office (if there is more than one office for the user), Motivation Code (why they made this donation, ex: general / newsletter), Designation Account (may not be necessary), whether it is a Charitable Gift, and donation ID.

Batch

A batch is a group of donations, which are managed and posted together. All donations in an unposted batch may be modified, while all donations in a posted batch are closed. Batches are processed individually, and post every donation within them at (roughly) the same time. Most donation operations are done through batches.

Posting

Posting batches closes all donations, and adds the total payment amount to the overall donation total, which is calculated over all posted batches. Once posted, no donation in the batch may be modified.

Report

A report details specific information requested by the user, which can involve many different parameters, and act within different contexts. This includes such things as requesting specific

information about donors, or selecting various pieces of information within a criteria (such as top 10 donations).

Receipt

A receipt is a generated, fully-detailed document that contains relevant information on a specific donation, and has all the details required for tax purposes.

User

A user is the basic, most common client, which makes up most of the usage of the software. They perform the work of entering donors, donations, and batches, but have no authority over the working of the internal systems, they only perform data entry.

Manager

A manager is a client which controls multiple users, supervising their actions and managing their permissions.

Admin

Admins perform setup and maintenance on the system, and control the inner workings of the system.