Manual for BLC Receipt Tracking Website for Admins

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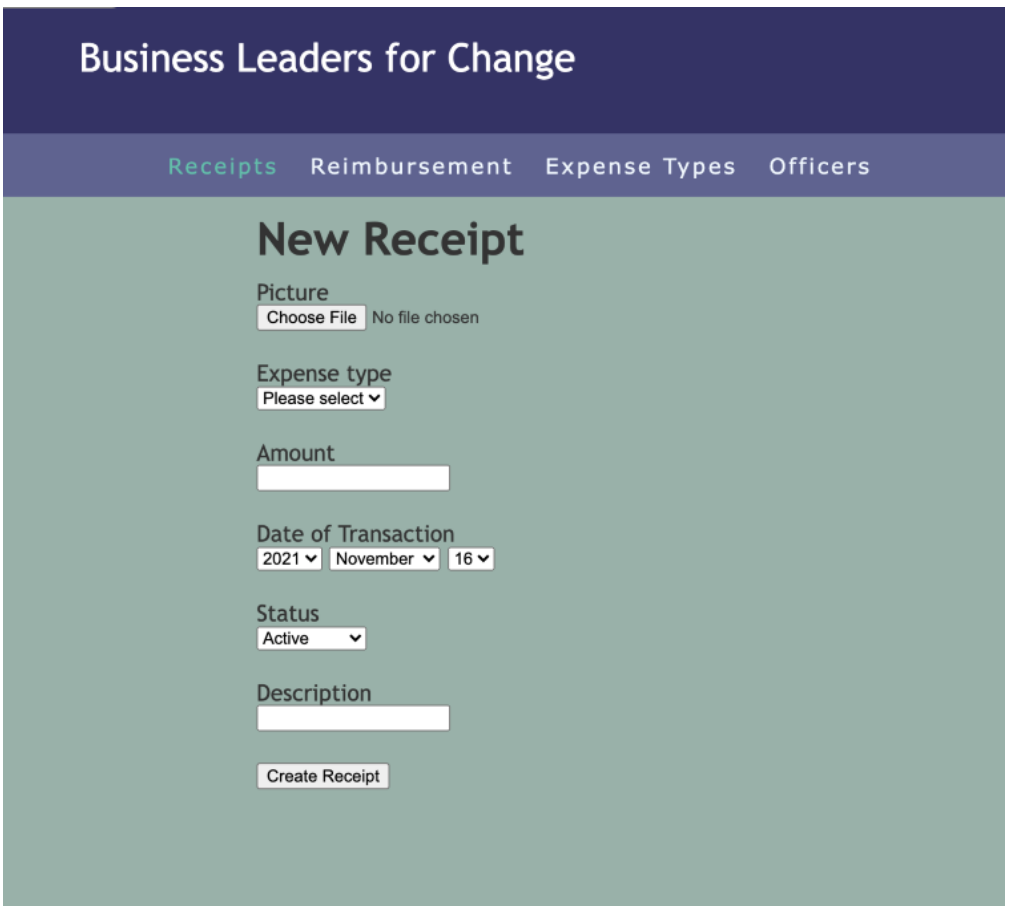
Logging In

Click the link on the login page and log in with your Google (tamu) account. You will only be able to log in if you are a registered user in the system. Admins can edit the list of registered users, including who has admin permissions.

Receipts

This is the only page which non-admins (regular officers) can access. This page allows you to submit a new receipt. Receipts are stored images of receipts with a corresponding expense type from a list which can be edited from the expense types index page, amount of money, date of the transaction, status, and description.

Pictured below is the new receipt page



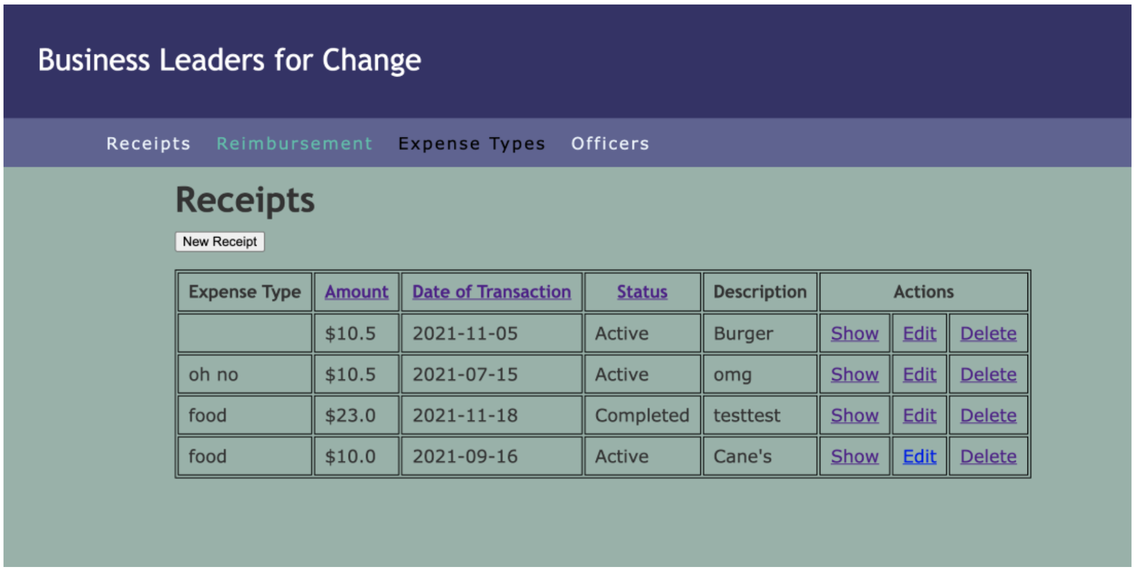
Creating a new receipt:

1. Click choose file and select the picture of your receipt (in the format .jpg or .png)
2. Select expense type from dropdown menu
3. Enter amount in $
4. Select the date of the transaction from the drop down menus
5. Set the status to either active or completed
6. Give a basic description of what the receipt is for
7. Click “Create Receipt”

Reimbursement

The Reimbursement tab lists all receipts which have been created. This tab is only accessible by admins

Pictured below is the receipt index page. From here you can create, show, edit, or delete a receipt as well as being able to sort them by attributes.



Expense Type	Amount	Date of Transaction	Status	Description	Actions		
	$10.5	2021-11-05	Active	Burger	Show	Edit	Delete
oh no	$10.5	2021-07-15	Active	omg	Show	Edit	Delete
food	$23.0	2021-11-18	Completed	testtest	Show	Edit	Delete
food	$10.0	2021-09-16	Active	Cane's	Show	Edit	Delete

Creating a new receipt:

1. From Receipts page, click “New Receipt”
2. Click choose file and select the picture of your receipt (in the format .jpg or .png)
3. Select expense type from dropdown menu
4. Enter amount in $
5. Select the date of the transaction from the drop down menus
6. Set the status to either active or completed
7. Give a basic description of what the receipt is for
8. Click “Create Receipt”
9. If you wish to return without creating a new receipt, click the “Back” link

Showing a single receipt (with it’s image):

1. Click the “Show” link next to the desired receipt on the index page
2. All attributes will be listed and the image will be visible
3. Click “Edit” to edit the receipt or “Back” to return to the index page

Editing a receipt:

1. Edit any of the fields you wish to change as you would when creating a new receipt
2. Click “Update Receipt”
3. If you wish to return without editing the receipt, click the “Back” link

Deleting a receipt:

1. Click the “Delete” link for the receipt you wish to delete on the receipt index page
2. The page will ask if you are sure you want to delete the receipt, answer accordingly

Sorting receipts:

From the receipt index page, you can sort them by amount, date of transaction, or status. By clicking any of the corresponding links at the top of the chart which lists all receipts, you can sort by that attribute.

Expense Types

Expense types are labels which are given to receipts, and they contain only a name and a description. This tab is only accessible by admins.

Pictured below is the expense type index page. From here you can create, show, edit, or delete an expense type.

Creating a new expense type:

1. Type the name of the expense type
2. Type the description of the expense type
3. Click “Create Expense Type”
4. If you wish to return without creating a new expense type, click the “Back” link

Showing a single expense type:

1. Click the “Show” link next to the desired expense type on the index page
2. All attributes will be listed
3. Click “Edit” to edit the expense type or “Back” to return to the index page

Editing an expense type:

1. Edit any of the fields you wish to change as you would when creating a new receipt
2. Click “Update Expense Type”
3. If you wish to return without editing the expense type, click the “Back” link

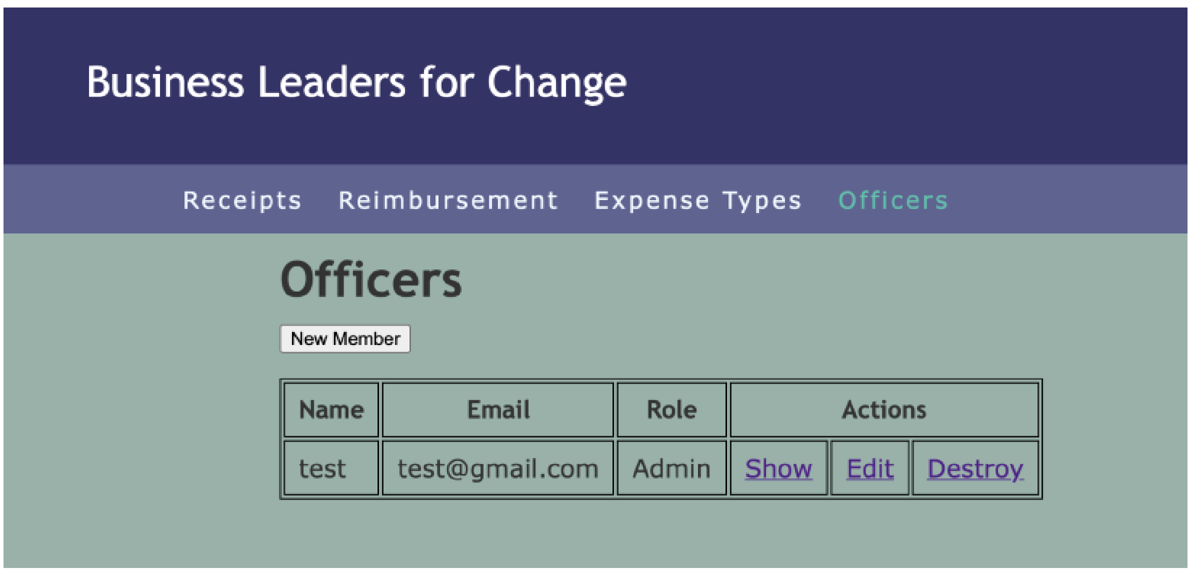
Deleting a expense type:

1. Click the “Delete” link for the expense type you wish to delete on the expense type index page
2. The page will ask if you are sure you want to delete the expense type, answer accordingly

Officers

Officers/members have the attributes of their name, their email, and their role in the club which determines whether they will have admin permissions or not. This tab is only accessible by admins.

Below is the officers index page, From here you can create, show, edit, or delete officers.



Creating a new officer:

1. Type the name of the officer
2. Type the email associated with the officer
3. Set whether they are to be a regular officer or an admin
4. Click “Create Officer”
5. If you wish to return without creating a new officer, click the “Back” link

Showing a single officer:

1. Click the “Show” link next to the desired officer on the index page
2. All attributes will be listed
3. Click “Edit” to edit the officer or “Back” to return to the index page

Editing an officer:

1. Edit any of the fields you wish to change as you would when creating a new officer
2. Click “Update Officer”
3. If you wish to return without editing the officer, click the “Back” link

Deleting an officer:

1. Click the “Delete” link for the officer you wish to delete on the officer index page
2. The page will ask if you are sure you want to delete the officer, answer accordingly