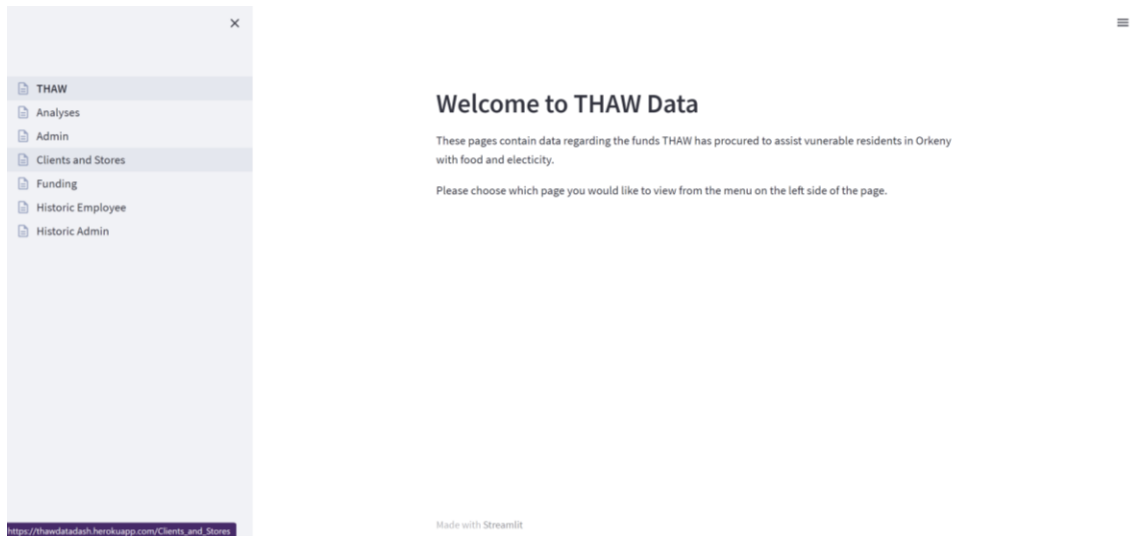


How To Use the THAW API

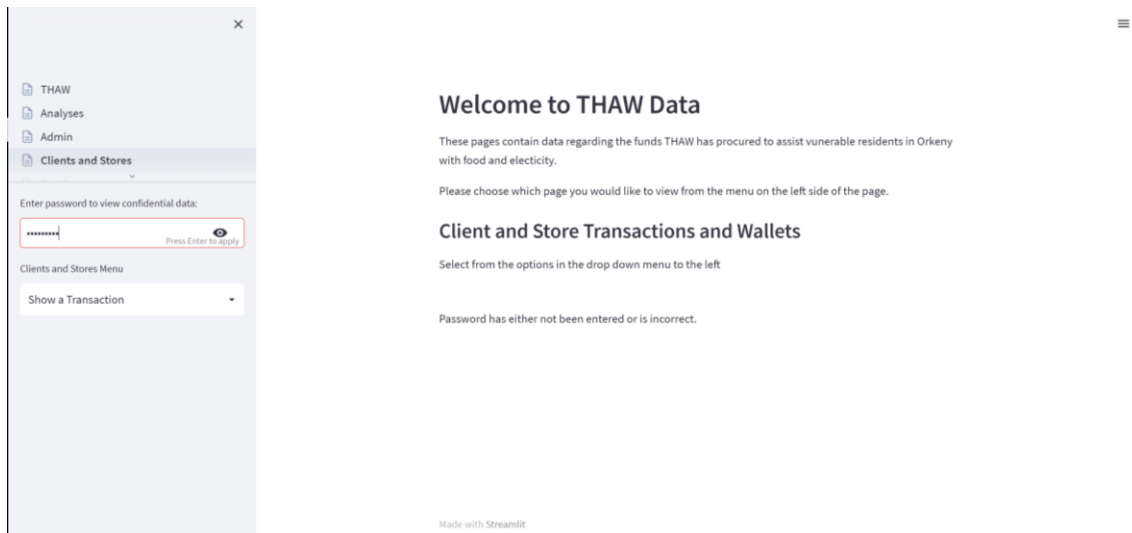
1. The `Clients and Stores` Pages

Allocate Funds

From the home page at <https://thawdatadash.herokuapp.com/> select the `Clients and Stores` page from the menu on the left side of the page.



You will need to enter a password to access this page.



From the 'Clients and Stores Menu' under the password box select the option 'Allocate Funds'

Client and Store Transactions and Wallets

Select from the options in the drop down menu to the left

Show a Transaction

Input the URN or store name that recieved the funds

Input the date the funds were moved

03/08/2022

Show Transaction by Date and URN

Made with Streamlit

From the drop-down menus select the sender from the 'Funded By' box and the 'Type' of transaction the funds being awarded to the client can be used for. This form is also used for clearing the store accounts using the THAW fund. This must not be allocated to clients as it is for Store account only.

A client or store must have an existing wallet with THAW before any funds can be allocated. The balance of the funding source is shown as 'Sender Balance' so you can see there are enough funds to allocate. The exception is Foodbank who donate to THAW in arrears so will be 0 or negative.

Allocate Funds

Type date allocated in format dd/mm/yyyy

03/08/2022

Funded By (Sender)

OICNew

Sender Balance: <143

What can the funds be used for?

Electricity

Client URN (Recipient)

Value of Award

0

Type of Value

GBP

Transaction Code

FMKe8pV20RuES6N

Delivery Method

App

Enter client URN under recipient. Client must have a wallet document before any funds can be allocated

Once a client’s URN or Store name has been entered then various options will appear under the form.

THAW

Analyses

Admin

Clients and Stores

Funding

Historic Employee

Enter password to view confidential data:
[password field]

Clients and Stores Menu
Allocate Funds

Delete your password to hide this data.

Sender Balance: 4748

What can the funds be used for?
Electricity

Client URN (Recipient)
V2_03

Value of Award
0

Type of value
GBP

Transaction Code
KwQhMVeBSchQh

Delivery Method
App

Allocate Funds

Show last transaction

Show the recipients wallet

Show the senders wallet

Undo the last transaction

You are able to view the recipients (client or store) wallet and the sender (Funded By) wallet. The recipient wallet should have 3 type options to match the options in the form above. The type specifies what the client is supposed to use the funds for.

THAW

Analyses

Admin

Clients and Stores

Funding

Historic Employee

Enter password to view confidential data:
[password field]

Clients and Stores Menu
Allocate Funds

Delete your password to hide this data.

GBP

Transaction Code
An6PFjL3pbQuf8x1

Delivery Method
App

Allocate Funds

Show last transaction

Show the recipients wallet

```
{
  "_id": "ObjectId('62e9586fc21a32688c63ab')",
  "Date": "datetime.datetime(2022, 8, 2, 8, 8)",
  "URN": "V2_03",
  "Electricity": 40,
  "Food": 0,
  "Cash": 0,
  "Comments": ""
}
```

Show the senders wallet

Undo the last transaction

THAW

Analyses

Admin

Clients and Stores

Funding

Historic Employee

Enter password to view confidential data:
[password field]

Clients and Stores Menu
Allocate Funds

Delete your password to hide this data.

GBP

Transaction Code
aatQuXKQueWdEg

Delivery Method
App

Allocate Funds

Show last transaction

Show the recipients wallet

Show the senders wallet

```
{
  "_id": "ObjectId('62d7cffe557174067067f8c3')",
  "Date": "datetime.datetime(2022, 7, 28, 0, 0)",
  "URN": "01CNew",
  "Balance": 4748,
  "Comments": "The value is funds donated minus awards allocated to this date"
}
```

Undo the last transaction

If there are funds available and you are happy with the form click 'Allocate Funds' to move the funds from the funder's wallet to the client or store wallet. The green text indicates the funds have been transferred.

THAW
Analyses
Admin
Clients and Stores
Funding
Historic Employee

Enter password to view confidential data:
[password field]
Clients and Stores Menu
Allocate Funds
Delete your password to hide this data.

Type date allocated in format dd/mm/yyyy
03/08/2022

Funded By (Sender)
OICNew

Sender Balance: +748

What can the funds be used for?
Cash

Client URN (Recipient)
V2_03

Value of Award
30

Type of Value
GBP

Transaction Code
fLzH8vlg134u8RpE

Delivery Method
App

Allocate Funds

<sysmgs.results.InsertOneResult object at 9c777f965a794b> <sysmgs.results.UpdateResult object at 9c777f965a896d>

Show last transaction shows the record of the transaction that has been created.

THAW
Analyses
Admin
Clients and Stores
Funding
Historic Employee

Enter password to view confidential data:
[password field]
Clients and Stores Menu
Allocate Funds
Delete your password to hide this data.

30

Type of Value
GBP

Transaction Code
Hdn68Yr2r4uG1GFP

Delivery Method
App

Allocate Funds

Show last transaction

```
{
  "_id": "ObjectId('62ea8bcd96d52776ca3c89a')",
  "Date": "datetime.datetime(2022, 8, 3, 0, 0)",
  "Sender": "OICNew",
  "Type": "Cash",
  "Recipient": "V2_03",
  "Value": 30,
  "Type of Value": "GBP",
  "Transaction Code": "fLzH8vlg134u8RpE",
  "Delivery Method": "App"
}
```

Show the recipients wallet

Show the senders wallet

You can now check again and see that the recipient and sender balances have been updated accordingly.

The image displays two screenshots of a web application interface, likely for managing transactions and wallets. The left sidebar contains a menu with options: THAW, Analyses, Admin, Clients and Stores (selected), Funding, and Historic Employee. Below the menu, there is a password field for confidential data and a 'Clients and Stores Menu' dropdown set to 'Allocate Funds'. The main content area shows transaction details for a specific transaction ID (TAUcUCxpo4TwVw). The 'Delivery Method' is set to 'App'. The transaction details include a JSON object with fields: '_id', 'Date', 'URN', 'Electrictty', 'Food', 'Cash', and 'Comments'. The 'Show the recipients wallet' button is highlighted with a red box. The right sidebar contains a 'Transaction Code' field with the value 'Yb5d8WYXnLzrm'. The 'Delivery Method' is set to 'App'. The transaction details include a JSON object with fields: '_id', 'Date', 'URN', 'Balance', and 'Comments'. The 'Show the senders wallet' button is highlighted with a red box. The bottom of the page indicates 'Made with Streamlit'.

If a mistake is made then you can undo the transaction by clicking the 'Undo the last transaction' button. This will remove the transaction and return both wallets to their original values. Note this can only be done at this stage so it is advisable to check the wallets to ensure they are correct before leaving the page.

Show a Transaction

You can see the transaction details by entering the client URN or Store name and date of transaction. Note that if no transaction occurred then [] will be shown instead.

Client and Store Transactions and Wallets

Select from the options in the drop down menu to the left

Show a Transaction

Input the URN or store name that recieved the funds

V2_03

Input the date the funds were moved

01/06/2022

Show Transaction by Date and URN

[]

Made with Streamlit

If funds were allocated to a client more than once on the day entered all the records for that day will be shown.

Client and Store Transactions and Wallets

Select from the options in the drop down menu to the left

Show a Transaction

Input the URN or store name that recieved the funds

V2_03

Input the date the funds were moved

01/06/2022

Show Transaction by Date and URN

```
[{"id": "ObjectID('62e7ee975e19f488326c3e08')", "Date": "datetime.datetime(2022, 6, 1, 0, 0)", "Sender": "QICNew", "Type": "Electricity", "Recipient": "V2_01", "Value": 50, "Type of Value": "GBP", "Transaction Code": "GVCCfwK9H6j4CY", "Delivery Method": "App"}, {"id": "ObjectID('62e7ee975e19f488326c3e08')", "Date": "datetime.datetime(2022, 6, 1, 0, 0)", "Sender": "QICNew", "Type": "Food", "Recipient": "V2_01", "Value": 50, "Type of Value": "GBP", "Transaction Code": "Uw2xX3qHufwE3", "Delivery Method": "App"}, {"id": "ObjectID('62e7ee975e19f488326c3e08')", "Date": "datetime.datetime(2022, 6, 1, 0, 0)", "Sender": "QICNew", "Type": "Cash", "Recipient": "V2_01", "Value": 50, "Type of Value": "GBP", "Transaction Code": "hwOhUjkl55du72Z", "Delivery Method": "App"}]
```

Made with Streamlit

Show Wallet

This page will show the details of a wallet when a store name or client URN is typed into the box.

Client and Store Transactions and Wallets

Select from the options in the drop down menu to the left

Show Wallet

Enter the client URN

V2_01

Show Wallet

```
{
  "_id": "ObjectId('62e186f04c2349673b229bce')",
  "Date": "datetime.datetime(2022, 7, 27, 0, 0)",
  "URN": "V2_01",
  "Food": 10,
  "Electricity": 40,
  "Comments": "",
  "Cash": 40
}
```

Made with Streamlit

Create Wallet

To create a new wallet enter the client URN or store name. The values should be zero but can be changed if for some reason the client has a existing balance. If the value are increased from zero a note should always be added into the comments section as to why. Notes that could be helpful such as that a client is hard of hearing of can also be added but should be kept short and to the point. No personal details that could be used to identify the client should ever be included in the wallet. The system will not allow you to create more than one wallet for a client or store.

Client and Store Transactions and Wallets

Select from the options in the drop down menu to the left

Create Wallet

Input client URN or Store name

Electricity balance

Food balance

Cash balance

Date created in format dd/mm/yyyy

Comments, e.g. why balance is not 0 or client hard of hearing etc.

Insert Document

Show Document

Wallets can be removed by navigating to the Remove Wallet page and entering the client URN or store name associate with the wallet in the box provided This should only be done if a wallet is created in error or a client is to be removed from the system, e.g. if they move or are deceased. Once the wallet has been removed the client will no longer be able to have funds allocated to them.

2. The Funding Pages

Show Transaction

This page allows you to see transactions for a particular funding source by date or to view all transactions by selecting the name from the drop-down menu and entering a date in the 'Date' box.

Funding: Transactions and Wallets
Select from the options in the drop down menu to the left

Show Transaction

Name
OICNew

Date received
03/08/2022

Show Transaction

Show all transactions for funding source

Date	Funded By	Value	Type of Value	Comments
02/08/2022	OICNew	1000	GBP	
02/08/2022	OICNew	1000	GBP	
01/08/2022	OICNew	2000	GBP	testing after reset
01/08/2022	OICNew	1000	GBP	

Record Transaction

This page is to record funding received by THAW and enter in into the system so it can be allocated to clients. The funding source should be selected form the drop-down menu and amount donated typed into the 'Value of Donation' box. As in the client transaction form the wallet and the record of the transaction can be show by clicking the appropriate buttons.

Funding: Transactions and Wallets
Select from the options in the drop down menu to the left

Record Transaction

Date funds were received
03/08/2022

Funding source
OICNew

Value of Donation
0

Type of Value
GBP

Comments

Upload transaction

Show last transaction

Show wallet for funding source

The form for creating a wallet is slightly different for a funding source as they have a single balance. The error message on the image below is the systems way of telling you that no wallet exists with this name. It will not let you create more than one wallet for a funding source.

The screenshot displays a web application interface for managing funding sources. On the left is a sidebar menu with options: THAW, Analyses, Admin, Clients and Stores, Funding (highlighted), and Historic Employee. Below the menu is a password field labeled 'Enter password to view confidential data:' and a 'Funds Data Menu' dropdown set to 'Create New Wallet'. The main content area is titled 'Funding: Transactions and Wallets' and includes instructions to 'Select from the options in the drop down menu to the left'. It features a 'Create New Wallet' section with a 'Funding Source' text input, a 'Current balance' numeric input set to 0, a 'Date created' date input set to 03/08/2022, and a 'Comments' text area. At the bottom of this section are 'Create Wallet' and 'Show Wallet' buttons. A red box highlights the 'Show Wallet' button. Below the buttons, a JSON error message is displayed:

```
{
  "error": {
    "message": "src property must be a valid json object"
  }
}
```

Though not shown here, as with the 'Client and Stores' page for transactions there is an undo button should you make a mistake, such as recording the same transaction twice.

3. The Admin Pages

All

This page shows a table of all client and store transactions recorded by the system with the ability to download them as a csv file that can be opened in excel.

The screenshot shows the Admin interface. On the left is a sidebar with a menu: THAW, Analyses, Admin (selected), Clients and Stores, Funding, and Historic Employee. Below the menu is a password field labeled 'Enter password to view private data:' and an 'Admin Data Menu' dropdown set to 'All'. The main content area is titled 'Administrator' and includes a note 'Delete your password to hide this data.' Below this is a button 'Click to download table as csv file'. A table of transactions is displayed with the following columns: Transaction Code, Date, Value, Recipient, Type, Sender, Admin Cost, Delivery Method, and Time. The table contains 15 rows of transaction data.

Transaction Code	Date	Value	Recipient	Type	Sender	Admin Cost	Delivery Method	Time
GYCcfawwPkhHq4KV	01/08/2022	50	V2_01	Electricity	OICNew	0.0000	App	12:00
Uw2eXK2q6Muf0eEJ	01/08/2022	50	V2_01	Food	OICNew	0.0000	App	12:00
keChhsqk55duFZ2	01/08/2022	50	V2_01	Cash	OICNew	0.0000	App	12:00
mC8su73PEF91brFB	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00
q7Fj08cqJgycDIM	01/08/2022	10	Papdale	Cash	V2_01	0.0000	<NA>	12:00
qL60v8R8RtgA7N	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00
oydwQ3Tvjgm0dq	01/08/2022	10	Papdale	Electricity	V2_01	0.0000	<NA>	12:00
8W9CuTjxw75SHuV	01/08/2022	5	Papdale	Food	V2_01	0.0000	<NA>	12:00
gT2dFWNQ7TEK5khu	02/08/2022	30	V2_02	Electricity	OICNew	0.0000	App	12:00
c0SZ9ym58r34UFY	02/08/2022	45	V2_02	Food	Foodbank	0.0000	App	12:00
yKuyuz2k2UdWU40aP	02/08/2022	45	V2_02	Food	Foodbank	0.0000	App	12:00
PX0R8f8kxum3EDMS	03/08/2022	30	V2_03	Electricity	OICNew	0.0000	App	12:00

The download button will open the standard save box with the default file name being 'filename'. You can change this and navigate to a different folder in the usual way.

The screenshot shows a Windows 'Save As' dialog box. The address bar shows the path 'This PC > Desktop > THAW_Project > Project'. The left sidebar shows the 'Desktop' folder selected. The main area is empty with the message 'No items match your search.' At the bottom, the 'File name' field contains 'filename' and the 'Save as type' is set to 'Microsoft Excel Comma Separated Values File'. There are 'Save' and 'Cancel' buttons at the bottom right.

Filter by Recipient

This page allows you to filter the transactions by recipient, which can be with a client using their URN or a store using their name. The date range can be selected and the total value of transactions is shown above the download button. The table can also be expanded so all columns can be seen at once, use the escape button to return to the normal view.

THAW

Analyses

Admin

Clients and Stores

Funding

Historic Employee

Enter password to view private data:

Admin Data Menu

Filter by Recipient

Filter by Recipient

Type the code or name of the recipient account you want to see. Please note this is case sensitive.

Papdale

Enter start date in format YYYY-MM-DD

2020-01-01

Enter end date in format YYYY-MM-DD

2025-01-01

The final total is £ 55

Click to download table as csv file

Transaction Code	Date	Value	Recipient	Type	Sender	Admin Cost	Delivery Method	Time	Ph
mC8su73PEF91brFB	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	K0 11
q7Fj08cqJsgycDIM	01/08/2022	10	Papdale	Cash	V2_01	0.0000	<NA>	12:00	K0 11
qL60vBrRaRltgA7N	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	K0 11
oydxQ3Tvjgznlodq	01/08/2022	10	Papdale	Electricity	V2_01	0.0000	<NA>	12:00	K0 11
8WCuTjeju75IHuV	01/08/2022	5	Papdale	Food	V2_01	0.0000	<NA>	12:00	K0 11
phU2knyC3C1Q0CdA	02/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	K0 11

Transaction Code	Date	Value	Recipient	Type	Sender	Admin Cost	Delivery Method	Time	Postcode	Cumulative Total (£)
mC8su73PEF91brFB	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	KW15 1XA	10
q7Fj08cqJsgycDIM	01/08/2022	10	Papdale	Cash	V2_01	0.0000	<NA>	12:00	KW15 1XA	20
qL60vBrRaRltgA7N	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	KW15 1XA	30
oydxQ3Tvjgznlodq	01/08/2022	10	Papdale	Electricity	V2_01	0.0000	<NA>	12:00	KW15 1XA	40
8WCuTjeju75IHuV	01/08/2022	5	Papdale	Food	V2_01	0.0000	<NA>	12:00	KW15 1XA	45
phU2knyC3C1Q0CdA	02/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00	KW15 1XA	55

Filter by Type

You can filter by one or more types using the drop-down menu to add them and removing them by clicking on the cross beside the type you want removed.

THAW

Analyses

Admin

Clients and Stores

Funding

Historic Employee

Historic Admin

Enter password to view private data:

Admin Data Menu

Filter by Type

Administrator

Delete your password to hide this data.

Filter by Type

Which store account do you want to see:

Electricity x Cash x Food x

Enter start date in format YYYY-MM-DD

2020-01-01

Enter end date in format YYYY-MM-DD

2025-01-01

The final total is £ 555

Click to download table as csv file

Transaction Code	Date	Value	Recipient	Type	Sender	Admin Cost	Delivery Method	Time
GYCCfawPkhEqj4CV	01/08/2022	50	V2_01	Electricity	OICNew	0.0000	App	12:00
Uw2eXQzq6Mu0eEJ	01/08/2022	50	V2_01	Food	OICNew	0.0000	App	12:00
keCHNqjK55dufZ2	01/08/2022	50	V2_01	Cash	OICNew	0.0000	App	12:00
mC8su73PEF91brFB	01/08/2022	10	Papdale	Food	V2_01	0.0000	<NA>	12:00
q7Fj08cqJsgycDIM	01/08/2022	10	Papdale	Cash	V2_01	0.0000	<NA>	12:00