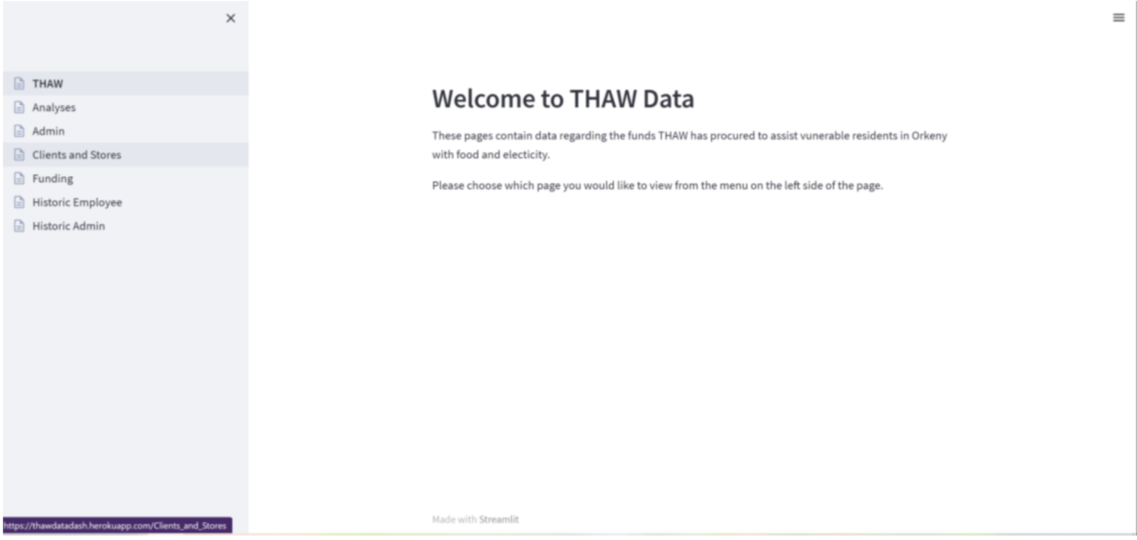
How To Use the THAW API

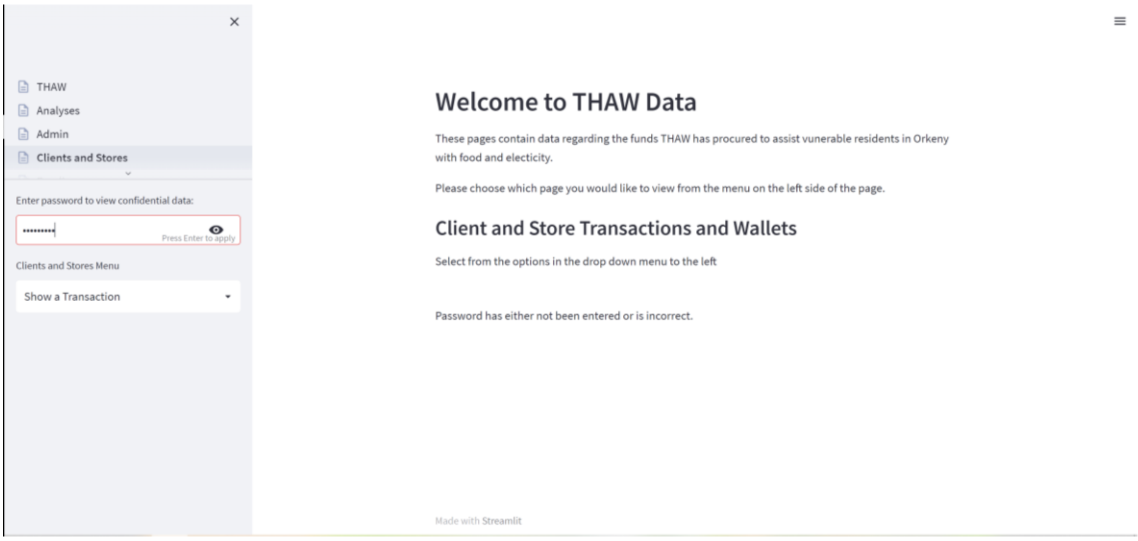
1. The `Clients and Stores’ Pages

Allocate Funds

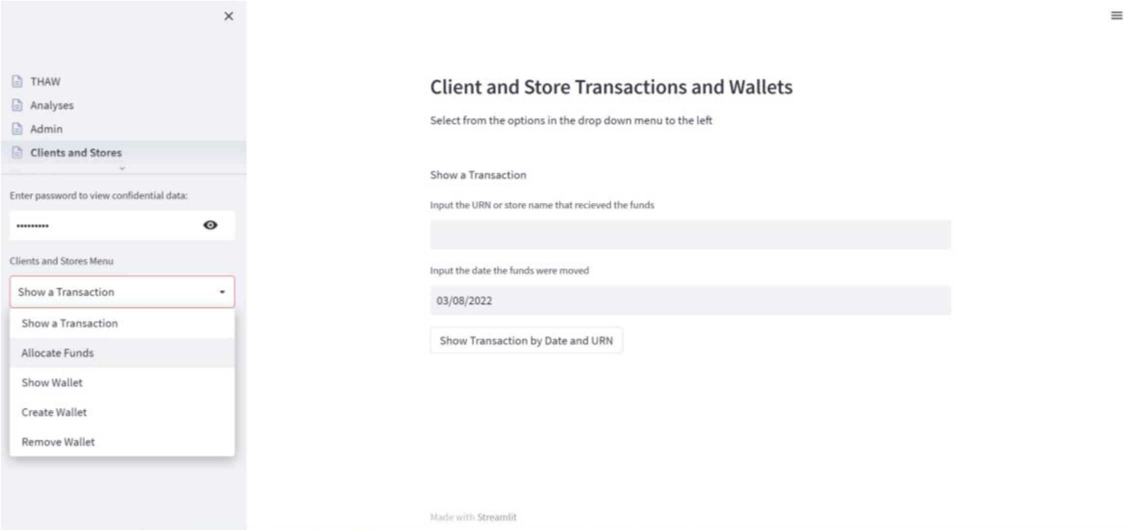
From the home page at https://thawdatadash.herokuapp.com/ select the `Clients and Stores’ page from the menu on the left side of the page.



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

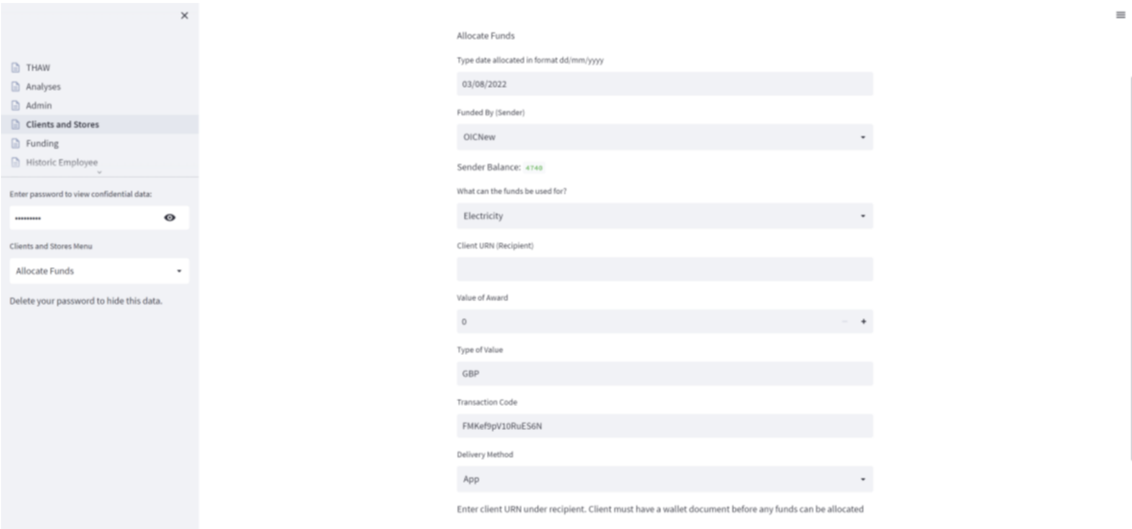


From the `Clients and Stores Menu' under the password box select the option `Allocate Funds'

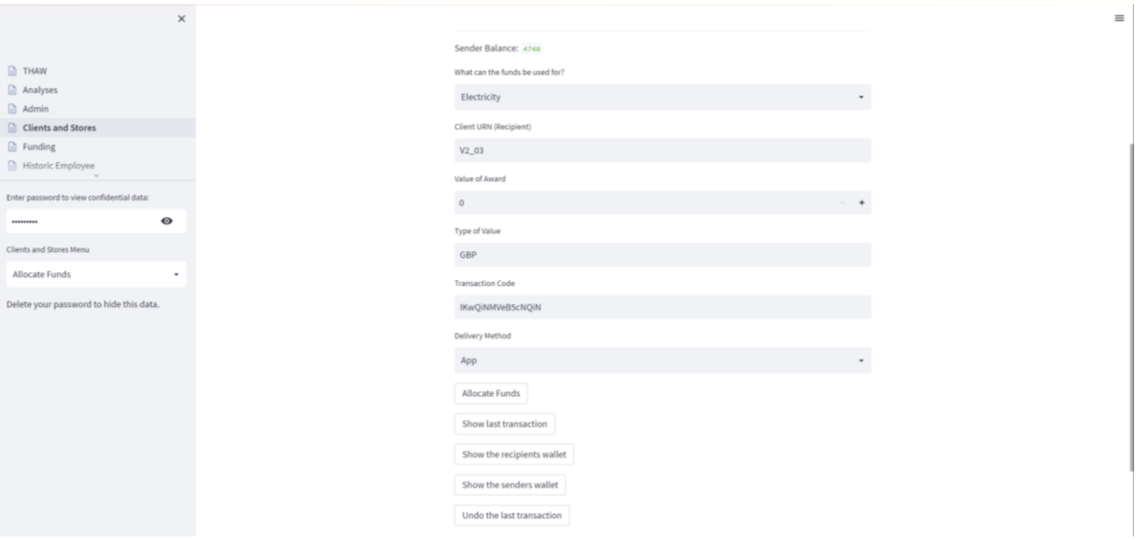


From the drop-down menus select the sender from the `Funded By' box and the `Type' of transaction the funds being awarded to the client can be used for. This form is also used for clearing the store accounts using the THAW fund. This must not be allocated to clients as it is for Store account only.

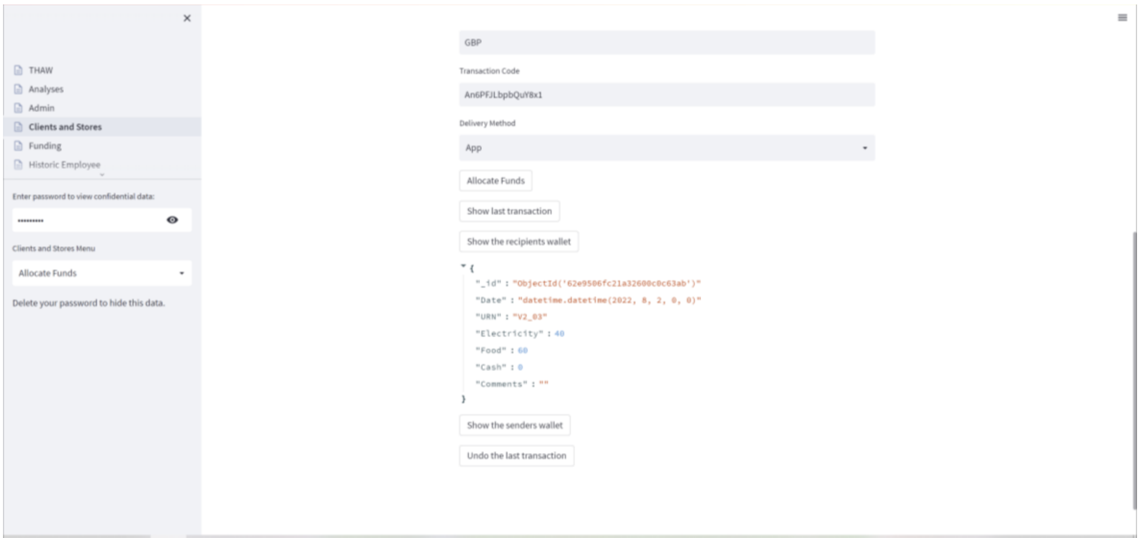
A client or store must have an existing wallet with THAW before any funds can be allocated. The balance of the funding source is shown as `Sender Balance' so you can see there are enough funds to allocate. The exception is Foodbank who donate to THAW in arrears so will be 0 or negative.

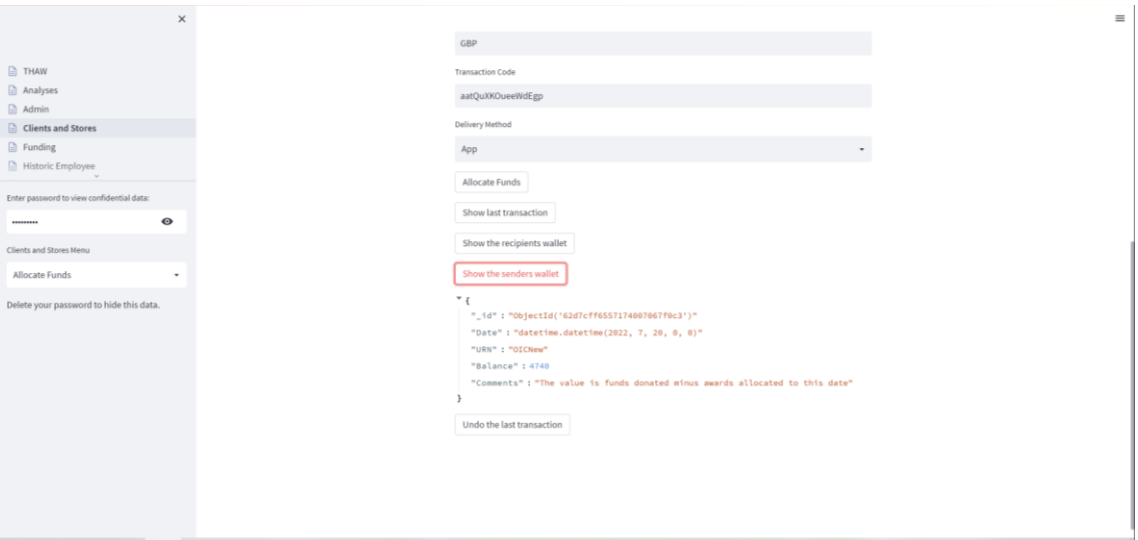


Once a client's URN or Store name has been entered then various options will appear under the form.

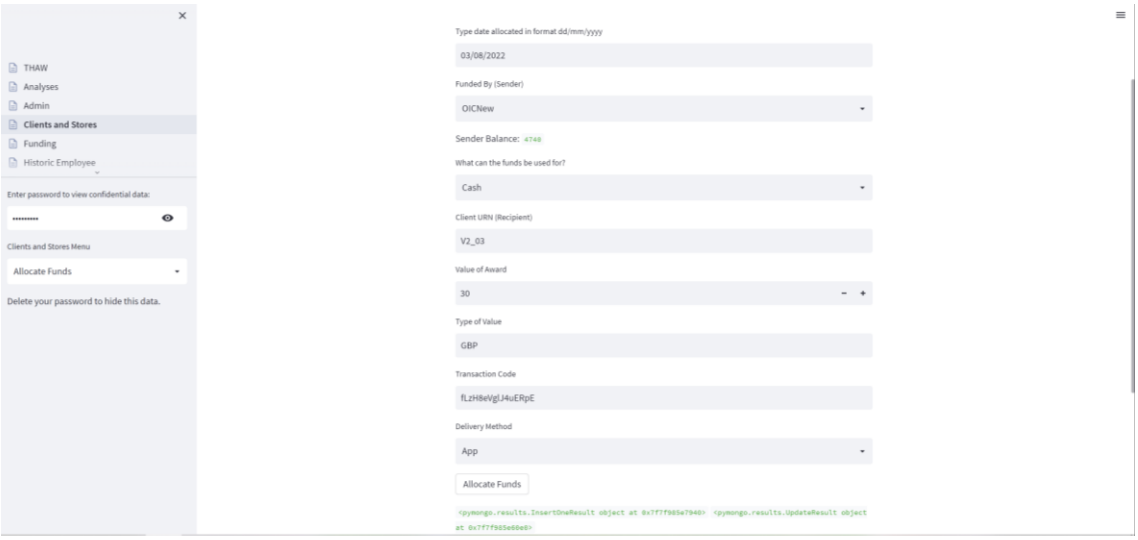


You are able to view the recipients (client or store) wallet and the sender (Funded By) wallet. The recipient wallet should have 3 type options to match the options in the form above. The type specifies what the client is supposed to use the funds for.

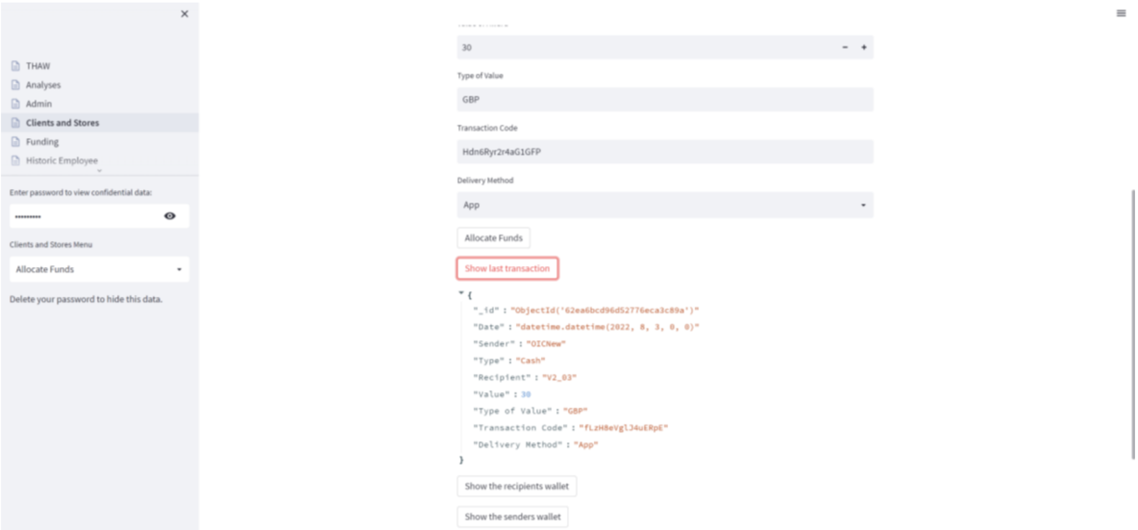




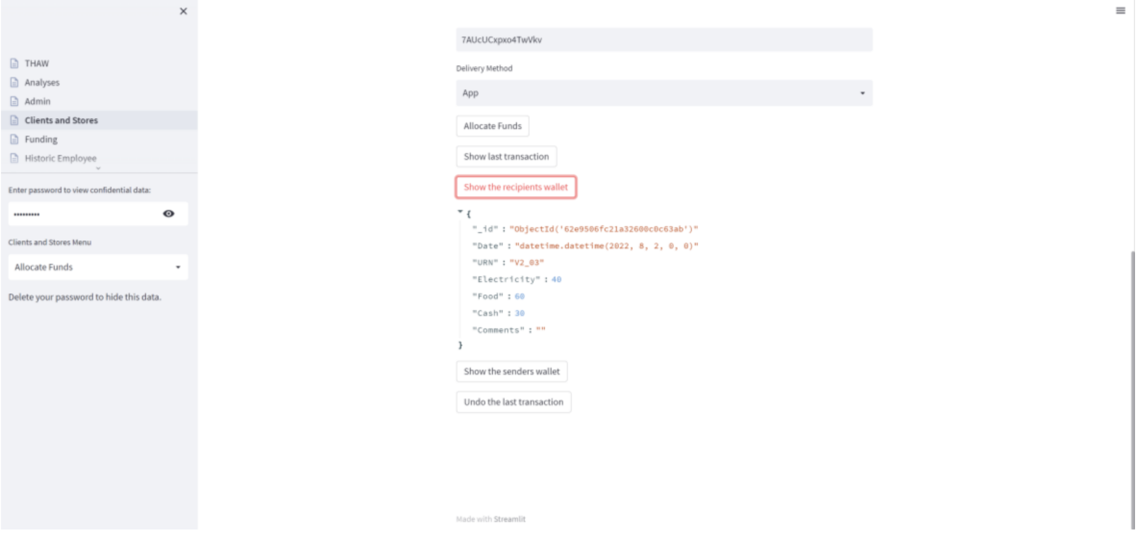
If there are funds available and you are happy with the form click `Allocate Funds' to move the funds from the funder's wallet to the client or store wallet. The green text indicates the funds have been transferred.

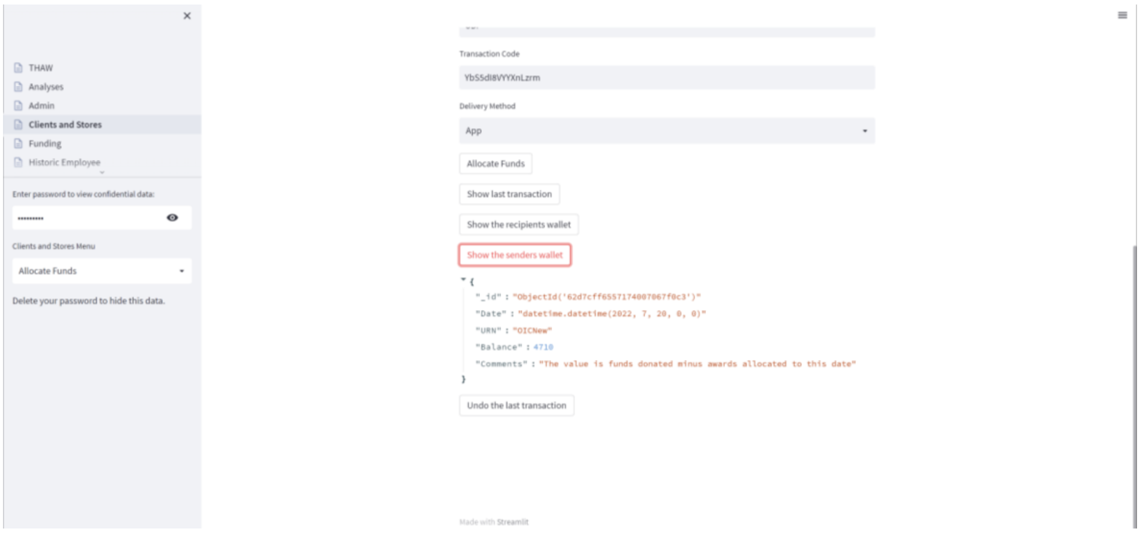


Show last transaction shows the record of the transaction that has been created.



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

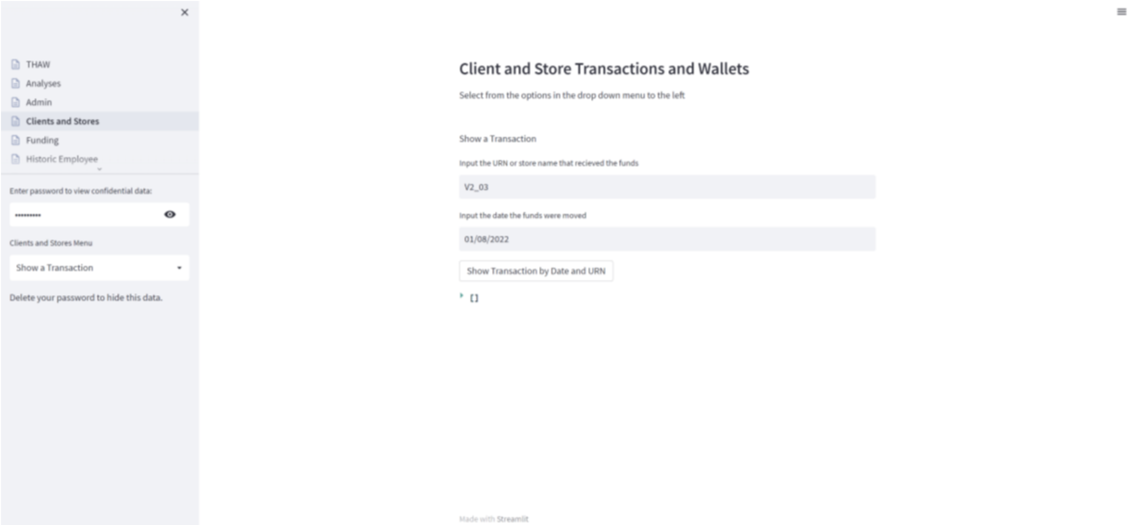




If a mistake is made then you can undo the transaction by clicking the `Undo the last transaction' button. This will remove the transaction and return both wallets to their original values. Note this can only be done at this stage so it is advisable to check the wallets to ensure they are correct before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

Show a Transaction

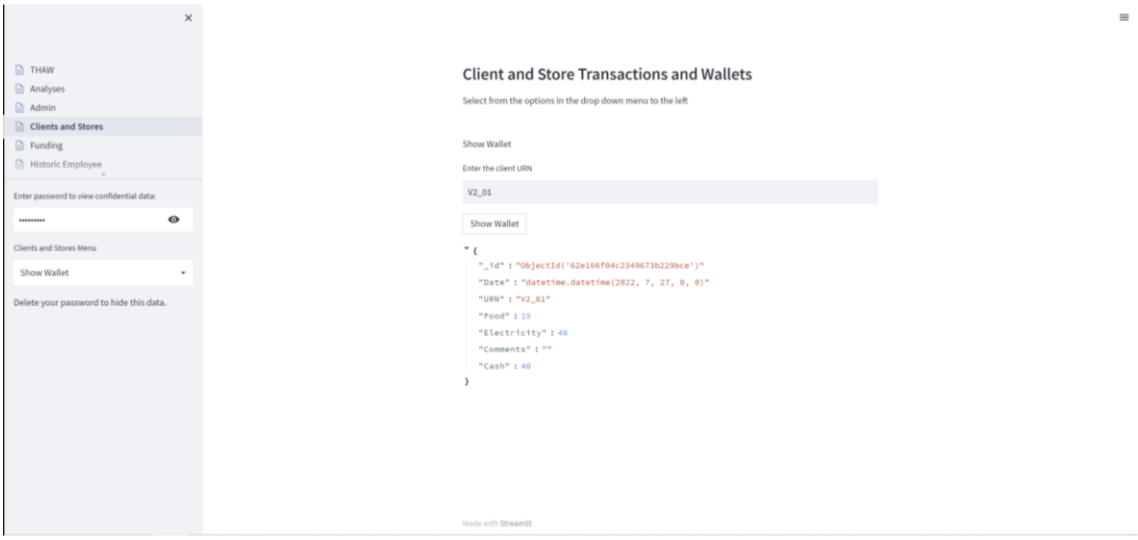
You can see the transaction details by entering the client URN or Store name and date of transaction. Note that if no transaction occurred then [] will be shown instead.



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

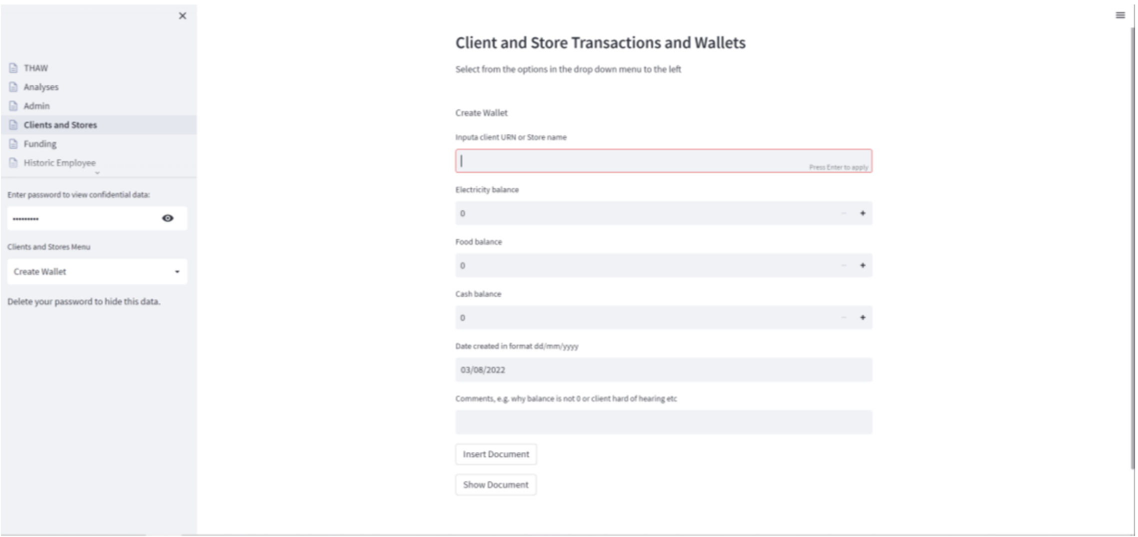
Show Wallet

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



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.

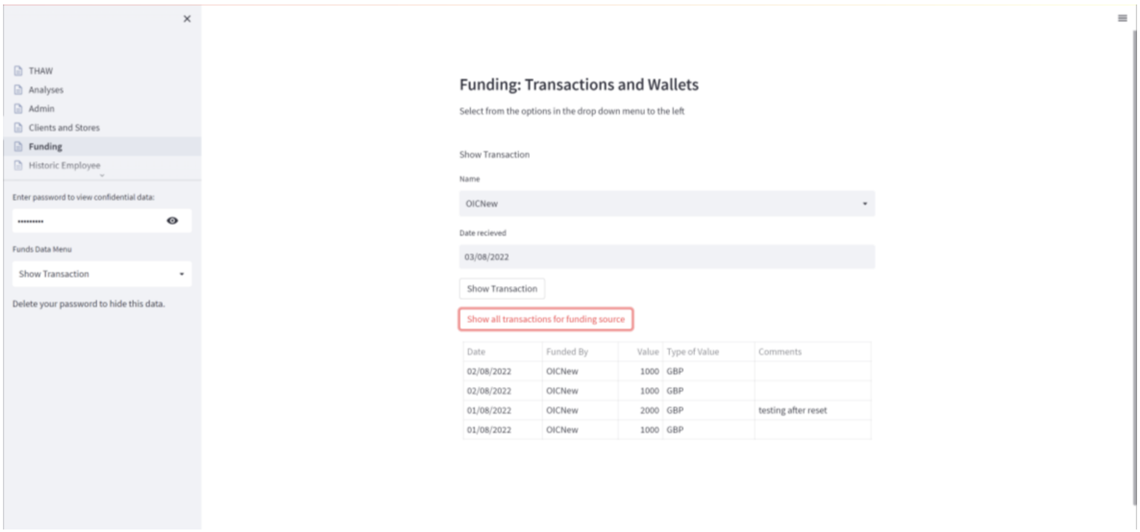


Wallets can be removed by navigating to the Remove Wallet page and entering the client URN or store name associate with the wallet in the box provided This should only be done if a wallet is created in error or a client is to be removed from the system, e.g. if they move or are deceased. Once the wallet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

2. The Funding Pages

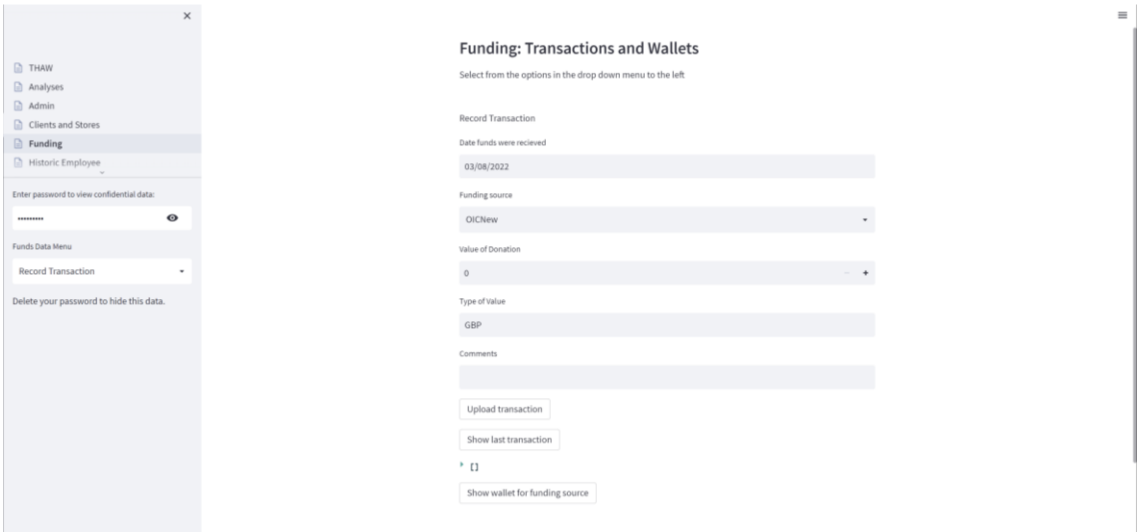
Show Transaction

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.

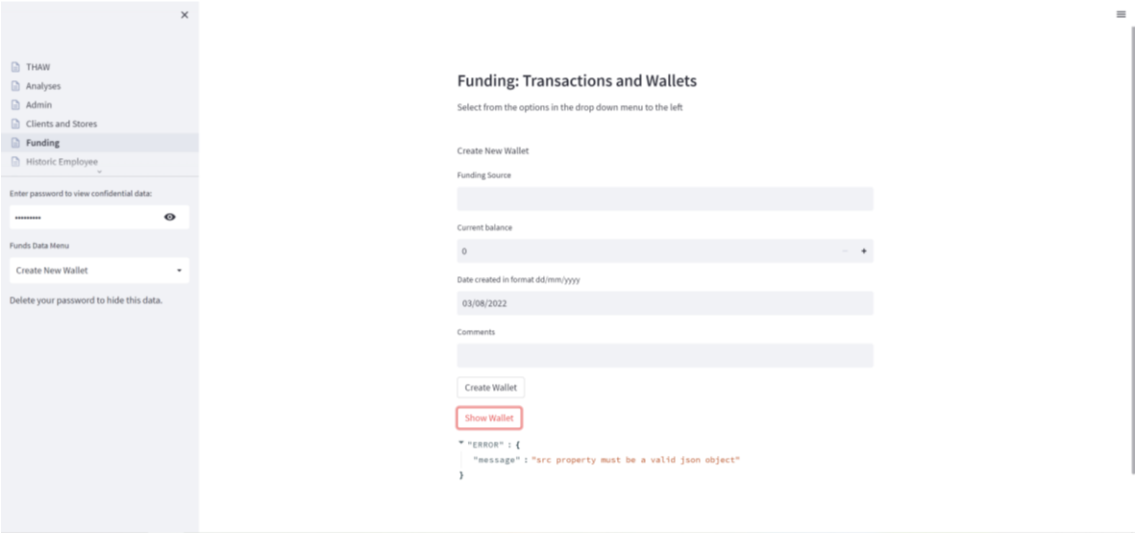


Record Transaction

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.



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.

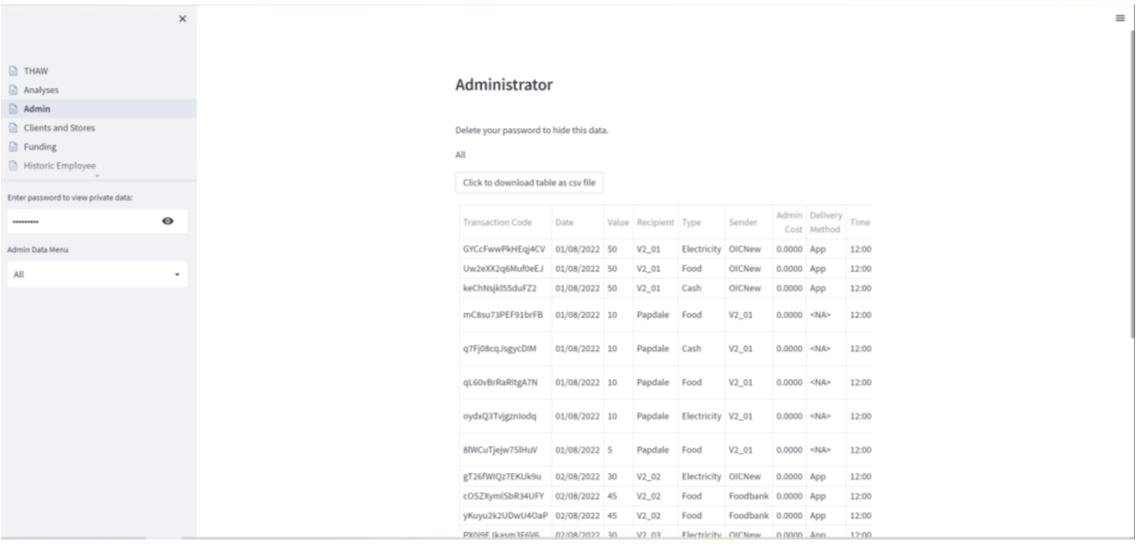


Though not shown here, as with the `Client and Stores' page for transactions there is an undo button should you make a mistake, such as recording the same transaction twice.

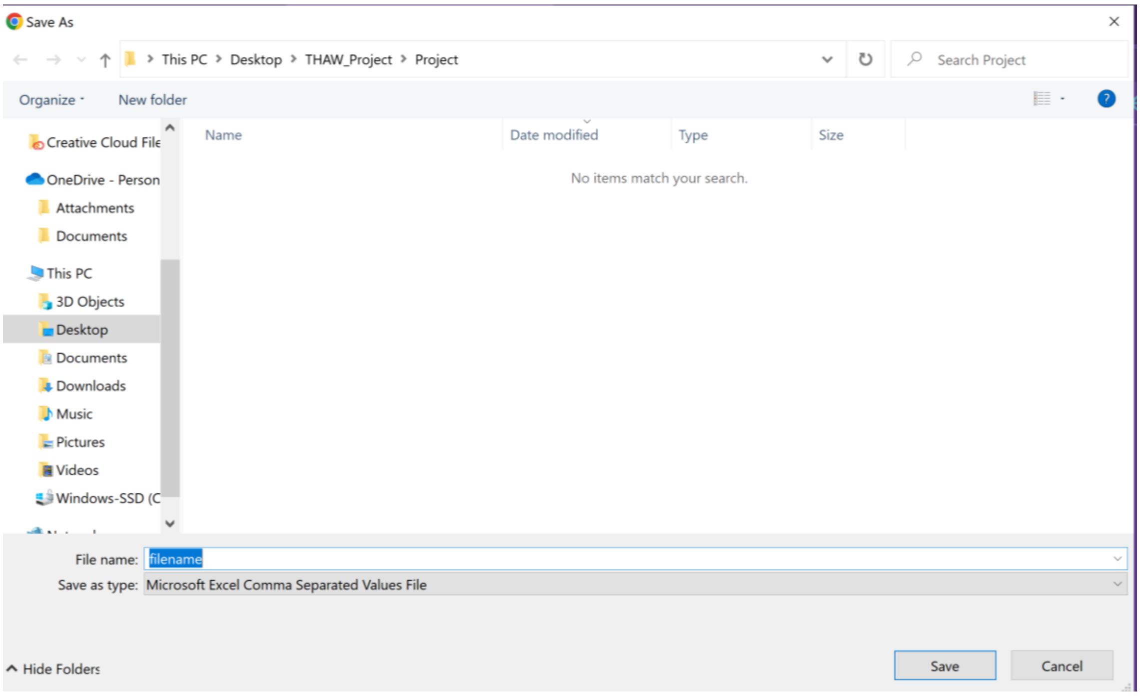
3. The Admin Pages

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.

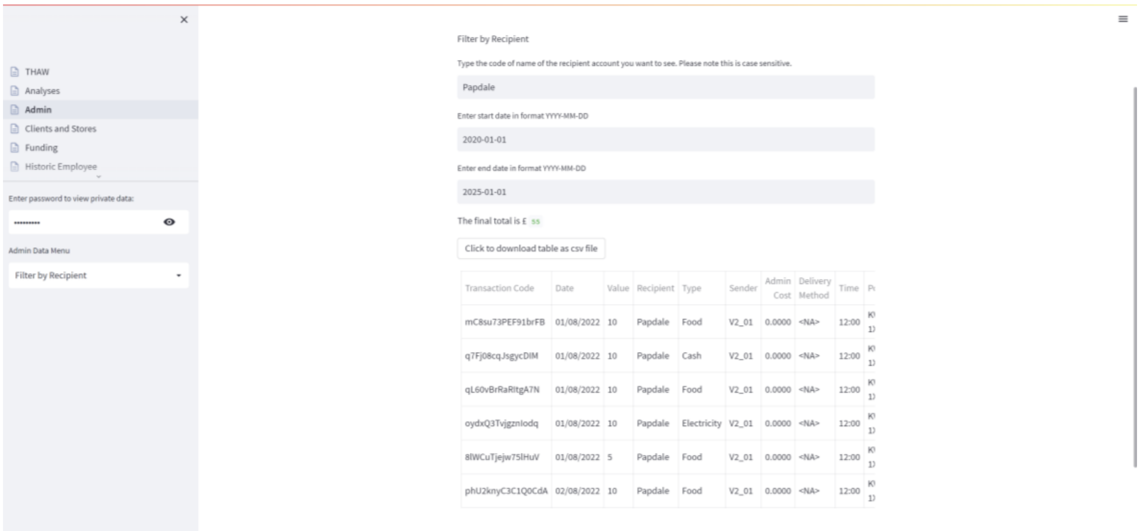


The download button will open the standard save box with the default file name being `filename’. You can change this and navigate to a different folder in the usual way.



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.



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
qL60vBrRaRItgA7N	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
8lWCuTjejw75lHuV	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.