PlowshareFTM

Donor Information Management System Help

This online database system requires input of donor contact information. Also input are funds, solicited from donors, linked to each donor's contact information. Various outputs can be viewed and downloaded into spreadsheets for further analysis and processing.

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Signing in to psmds.online

Users of this application must have a password. Passwords are supplied by the systems administrator. The password identifies the user and is known only to the user and the administrator. Passwords are stored on the system using a strong encryption.

To sign-in go to https://psdms.online in your Internet browser. (Please use one of these browsers: *Google Chrome*, *FireFox*, *Brave*, *Edge*, or *Safari*) Enter your password and click the "Login" button.

Click on "Logout" to log out. Closing the browser also logs you out.

There are three or four primary pages as seen in the *menu* at the botton of each page.

Adding a new supporter

After logging in you will see the *Maintain Supporters* page.

A "supporter" is any donor to the organization. The most important function of PSDMS is to keep an on-going record of donor contact information.

To add a new supporter or update an existing one use "Supporters" button in the menu.

Before adding a NEW supporter it is important to check if the person is already in the system.
The App will stop you from adding an exact duplicate name; however, if you have a slightly different spelling or nickname IT WILL add it to the file. Then add a New supporter if the person's name is not found in the name lookup in the upper left of the page.

When adding a New supporter fill in all the fields that apply to the new supporter. Then click the "New" button.

Note: **You must have names and street, city, state, zip information to succefully add a new supporter**.

Updating supporter information

To update information on an existing supporter click the "Supporters" button in the menu bar.

On the Maintain Supporters page start typing into the name lookup. When it appears click on it. The supporter's contact info and notes will be retrieved and filled into the fields on the page. Make any changes needed and then click the "Update" button.

Adding a new donation

To record a new donation made by a supporter click on the "Donations" button in the menu bar. Then, on the "Maintain Donations" page start typing the name to lookup.

If the supporter is not found in the lookup, then **all of the supporter contact info must be added first** using the "Maintain Supporters" page (use the "Supporters" button from the menu bar.)

If the name is found then click on it and the donor's donation information will fill the page. Note that all previous donations appear at the bottom of the page.

Next select the event associated with the donation from the "Event" list box. Enter the Donation Amount (must be numeric), and other fields as necessary. Make sure that the "Sponsor" or "Donor" checkboxes are checked, as well as the "Silent Auction Donor" checkbox if it applies.

Finally click the "NEW" button.

Note: **For every event a donor could have a total amount of cash donation and/or a total amount of Silent Auction donation.**

Updating donation information

To update or view donation information for a supporter click on the "Donations" button in the menu bar.
Then, on the "Maintain Donations" page start typing the name to lookup.

If the supporter is not found in the lookup, then you are not "updating" information because the supporter is not yet in the system. See "Adding a new donation" above.

If you see the supporter's name Click on it. The supporter's name will be retrieved. Also, previous donations (events and amounts) will appear in the bottom left of the page under "Donations:".

When you see the list of previous donations, click the one you want to update. Then enter or change data in any of the fields. Finally, click the "Update" button.

If you mistakenly enter a donation for the wrong supporter just go back and update that donation with the "Delete" checkbox checked.

Outputting Donor information and activity

Click on the "Outputs" button in the menu bar.

There are two possible output mediums.

The first is output to screen. This results in a tabular-like listing which you can view and print. In addition with this format there are links to the donor's profile at the start of each row.

The second is output to CSV file. For this medium check the "output to CSV file" checkbox. When you select "output to CSV" the file is downloaded to your computer (or device.) The name of this file by default is *dmoutput.csv*. You can change this name before you submit the query, (recommended!)

but be sure to always keep the .csv on the end of the file name. Note: the "output to CSV file" option can be used with all the the three query types.

This downloaded file can then be used as input to various other applications (such as MS Excel and other spreadsheet programs.) The CSV file is compatible input for spreadsheet programs.

Query types

Donations by Event query

After (or during) each event (fundraiser etc.) you can use this query to view or download supporter and Donation information for the event.

Selection by Donor

These 4 queries may provide supporter information using the different criteria.

Donor Custom Selection

This query option allows you to "zero in" on any specific supporter fields.
For instance: `city != "WAUKESHA"`
Note: this will not query the "donations" information.

System maintenance

The Events table

Items in the Events table should never be deleted once the system is loaded and is being maintained. This is because the event ids are populated as foreign keys in the Donations table.

Maintaining the Events table should be limited to an application administrator. Certain fields in the Events table can be changed and of cousre new event dates will need to be added each year.

Here are other actions that can be performed from the "admini.php" page.

```
Duplicate Street Lines
Duplicate Last Name Lines
Duplicate Email lines
Event Maintenance Page
View Logins
View SQL transaction log
Archive SQL transaction log
Toggle TEST and LIVE databases
SQLview
Download database
```

The Donor table

Whether supporter information in the Donor table ever gets deleted should be at the discretion of the system administrator. Note that if a supporter is deceased, and their info is deleted, then their donation info will also disappear. Therefore, when any supporter becomes "inactive" their status can be indicated in the Supporter page. Set "Status" to 1.