CharityQ

User Manual

TOGETHER A GREATER GOOD

Capstone 004 Spring 2018

MANAGEMENT INFORMATION SYSTEMS | UNIVERSITY OF NEBRASKA AT OMAHA

Contents

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System requirements

This application resides in the cloud and requires a browser with an internet connection. Chrome and Firefox are recommended.

	Minimum Requirements	Recommended
Internet Connection	Cable or DSL	Cable or DSL
Internet Browser	Chrome, Microsoft Edge, Firefox, Internet Explorer, Safari	Google Chrome
Resolution	800x600 resolution	1920x1080

Process Flows

Overview

The system is designed for a business administrator to create and configure one account for an organization. Once the account has been created, the business administrator can imbed the provided HTML code on a donation page on the organization's website. When charities request donations from the business, the employees should direct the requestor to the website. The donation requestor enters the request into the system. When the business admin or business user logs into the system dashboard, the request is displayed, and the user can approve or decline it. Once the request is processed, an email is generated and sent to the donation requestor.

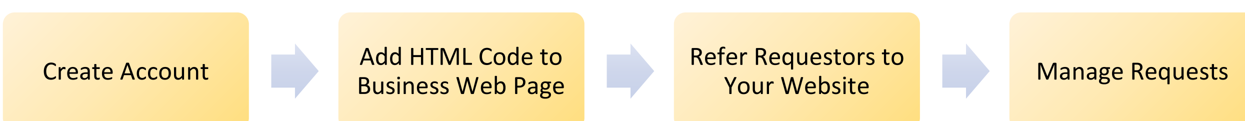


Figure 1: Overview of main application flow

Create Account

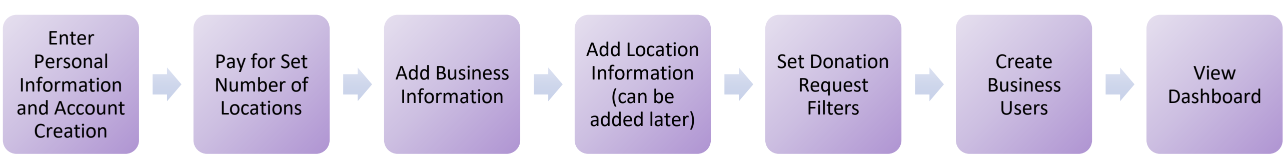


Figure 2: Business account creation

The business admin creates the CharityQ account. The annual or monthly subscription is based on the number of locations needed. Each location has a set budget. The business admin can add business rules to filter requests, create custom templates for emails sent to donation requesters, and delegate requests to business users to review.

Refer Requesters to Your Website

Figure 3: Use the "Invite link" to redirect requestors to the donation page

Requests are completed by the requestors within a standardized form designed to capture information and documentation necessary to make the user's decision process easy. Requests are displayed as pre-approved or pre-rejected on the user's dashboard based on rules determined by the business administrator. If rules to auto-reject requests are enacted, an email is automatically generated approximately 48 hours after the pre-rejected request is entered.

Manage Requests – Dashboard

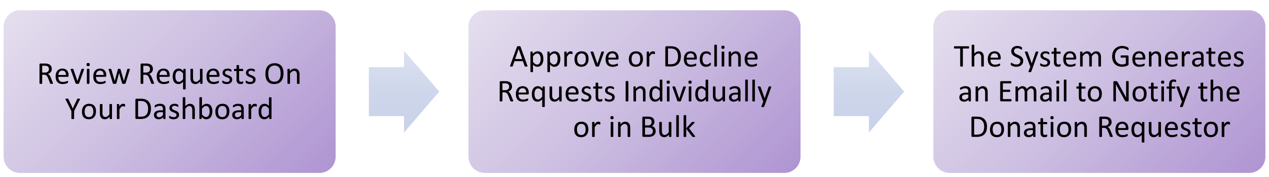


Figure 4: Manage requests in the dashboard

Requests are reviewed by the business administrator or delegated by location to the business user. Requests displayed on the user's dashboard are marked pre-approved or pre-rejected. Requests that are pre-rejected but not auto-rejected are displayed on the user's dashboard for approximately four days before automatically generating an email to inform the donation requester the request is declined. Requests marked pre-approved must be manually processed by the user. The approved donation dollar amount should be entered by the user when a request is approved. An email is generated to inform the donation requestor when a request is approved. The user has the option to edit the email to include additional information, for example: how the donation will be distributed.

Page Navigation

The page navigation is displayed along the top of the screen.

Before Login

- About Us

- How this Works
- Sign Up!
- Login

After Login

- User Name
    - Profile Management
    - Reset Password
    - Logout
- My Organization
    - Donation Preference
    - Users
    - Business Locations
    - Communication Template
- Search Donations
- Dashboard

Splash page

Splash page (Figure 5) is the first page that a user's gets to see once they visit the application. This page describes what this application is all about, how it works, what are the payment plans and a link to sign up. Screenshot below gives the glimpse of the Splash page.

- **About Us** is a quick introduction to what the website is used for, price points, and benefits.
- **How the Process Works** is an external run-down of the process a business user can expect to follow to sign up.
- **Sign Up** directs the prospective user to additional sign up information and a link to sign up a business.
- **Login** directs a registered user to the login page. A link for **Forgot Your Password** will assist a registered user who does not remember the password.

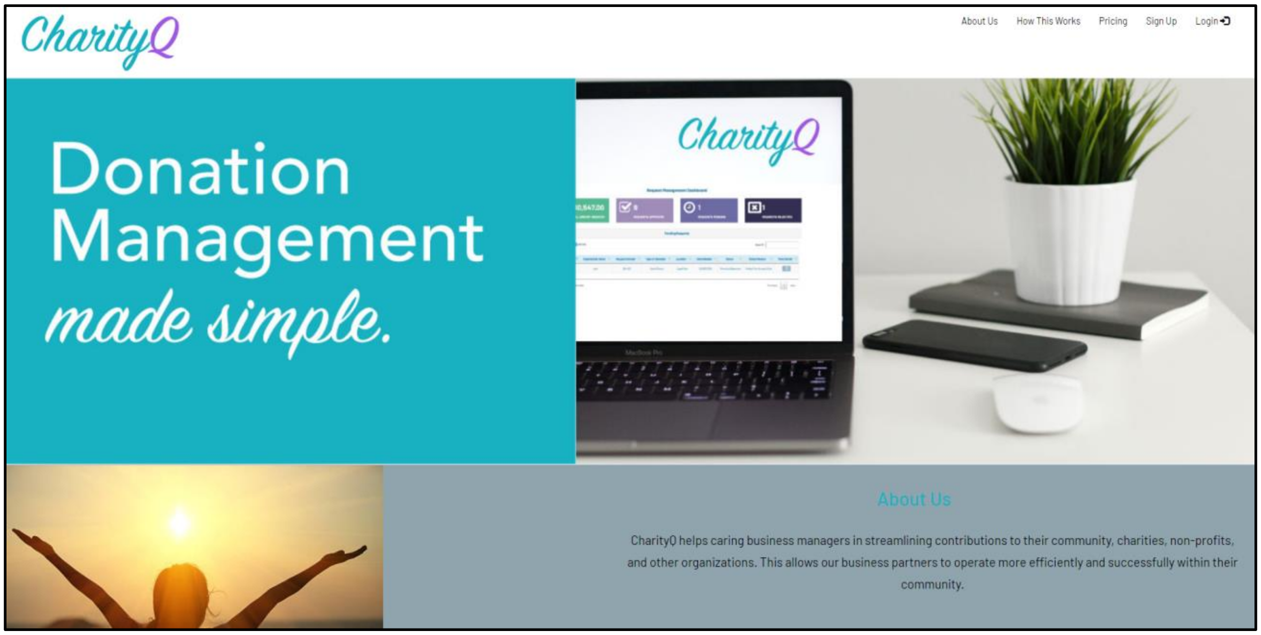


Figure 5: Welcome page on opening the website

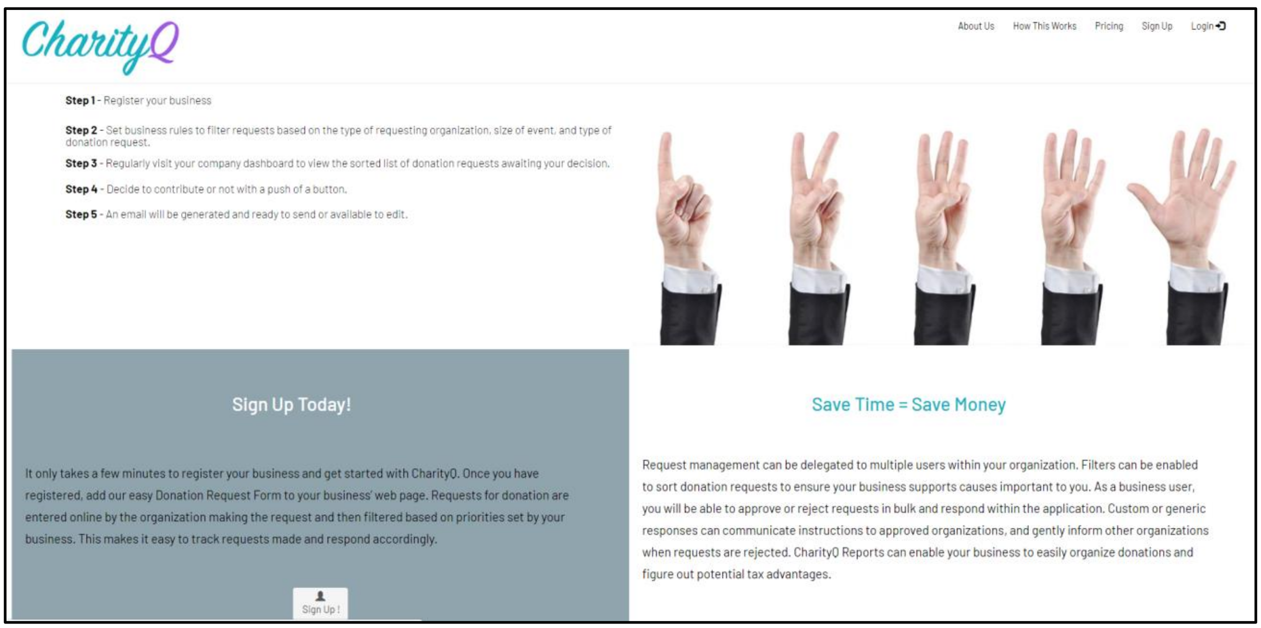


Figure 6: Description on the welcome page about the usage and need of CharityQ

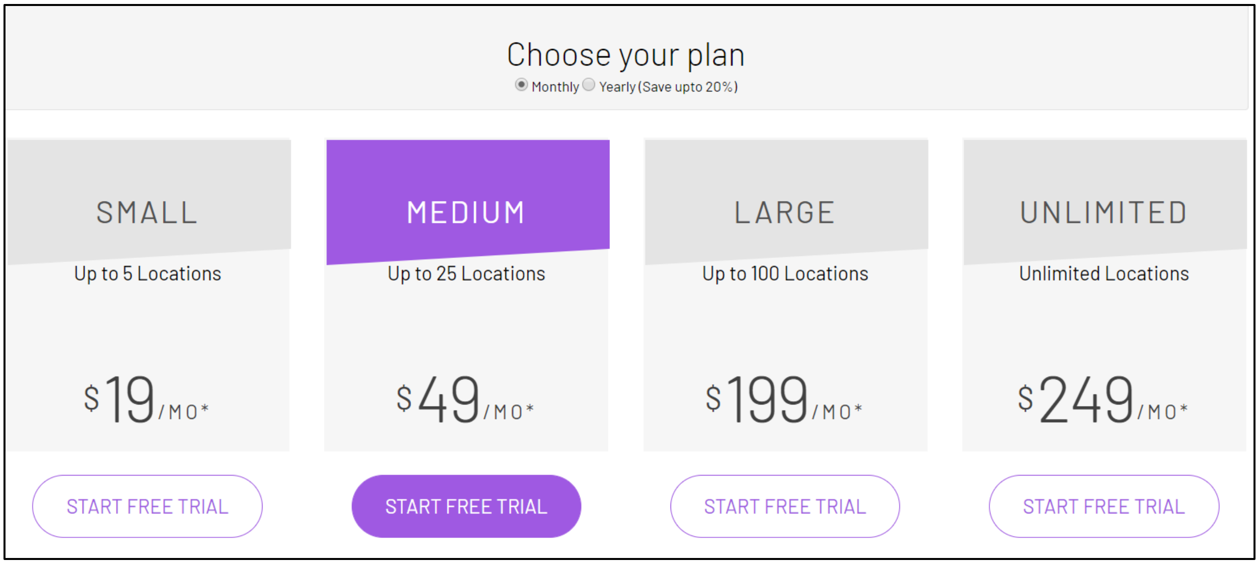


Figure 7: Subscription plans for CharityQ

Business users

Sign up

Businesses who like to use the application, will first need to sign up clicking on the sign up link on the splash page. A new page titled - Register Your Business is shown as screenshot below; user fill all the required details and clicks on Register.

The link to sign up directs the prospective user to a page to **Register Your Business** (Figure 8)**.**

- After registering the business, the user will start a **Subscription**
    - Select the desired plan size
    - Select the desired renewal period
    - Enter a coupon code if applicable
    - The final payment calculates based on the plan size
    - The **Card Number**, **Expiry Date**, and **CV code** are processed though Stripe when the user selects **Pay**.
- After creating an account and selecting a subscription the new business administrator is directed to the dashboard.

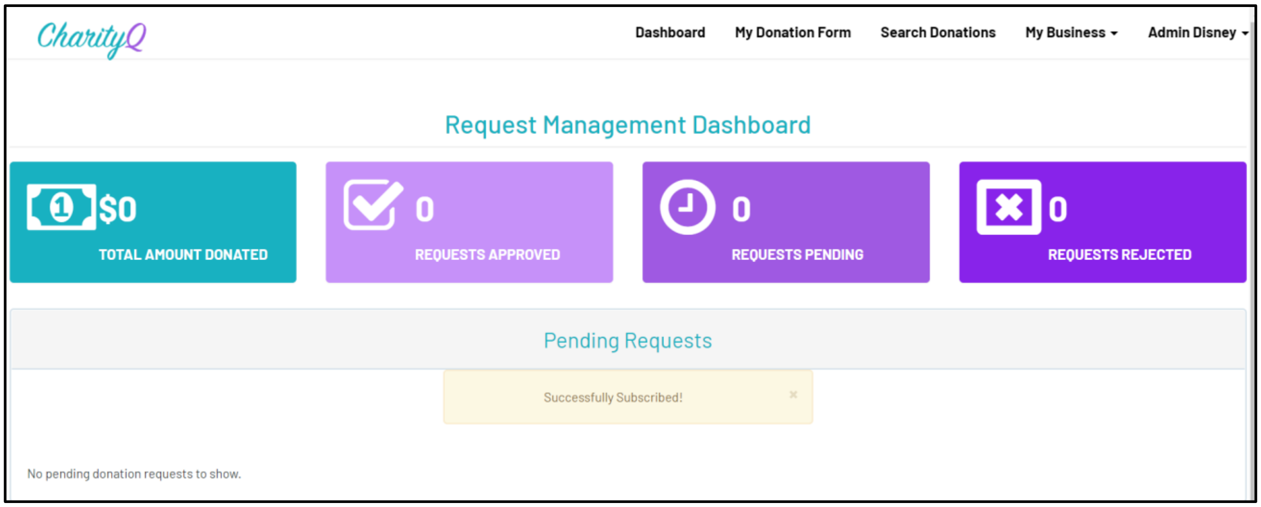


Figure 8: Business dashboard

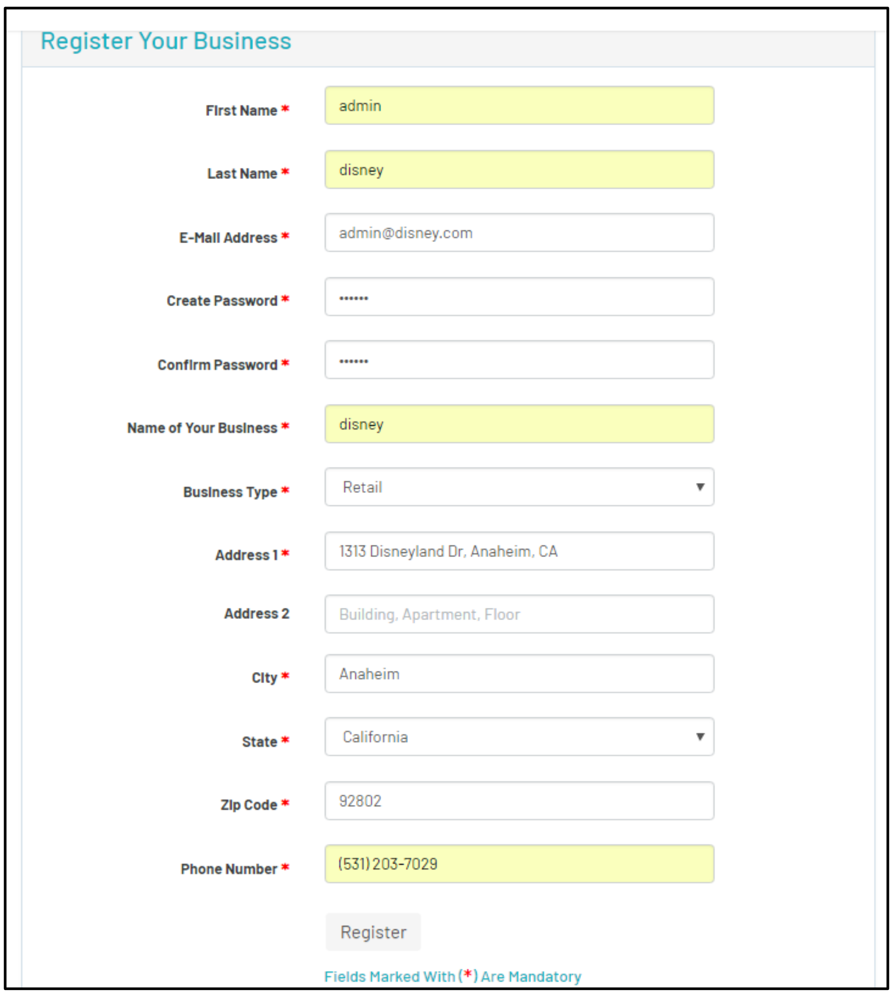


Figure 9: Business Registration form

Once the user clicks on Register, application shows the payment plans. Here user have a few options to select from; user can select the number of locations, monthly or yearly plan, a promo code if available. Once the final amount is displayed on the second pane, user enters valid card details and click on **Pay.**

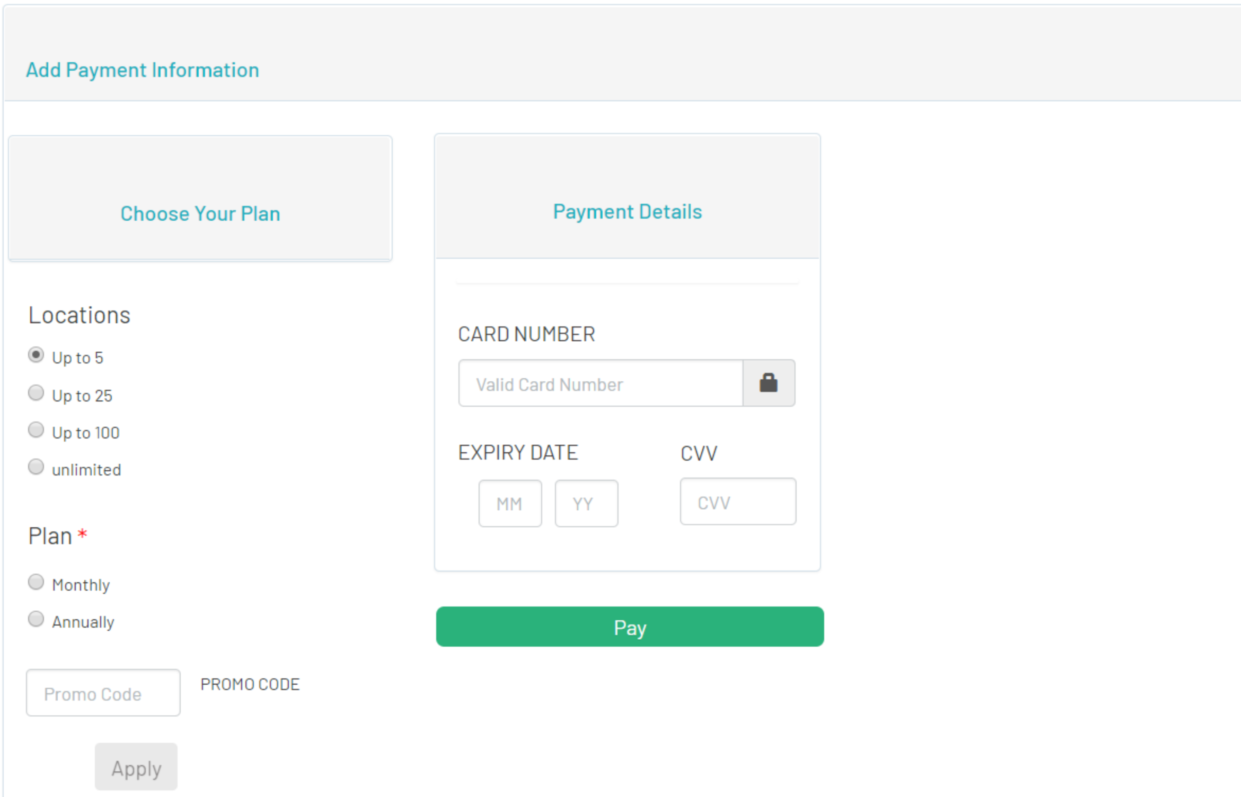


Figure 10: Payment to CharityQ

Once the payment is successful, user is taken onto the Dashboard.

Payment Failure

There are two scenarios where payment fails - with incorrect payment details (such as incorrect card number, expiry date) or if the bank declines payment (for reasons such as insufficient balance).

When the incorrect details are entered, user remains on the payment page and an error message is displayed as shown below. The card number entered here is random and incorrect and you can also see the error message displayed in red that says - *Your card number is incorrect.*

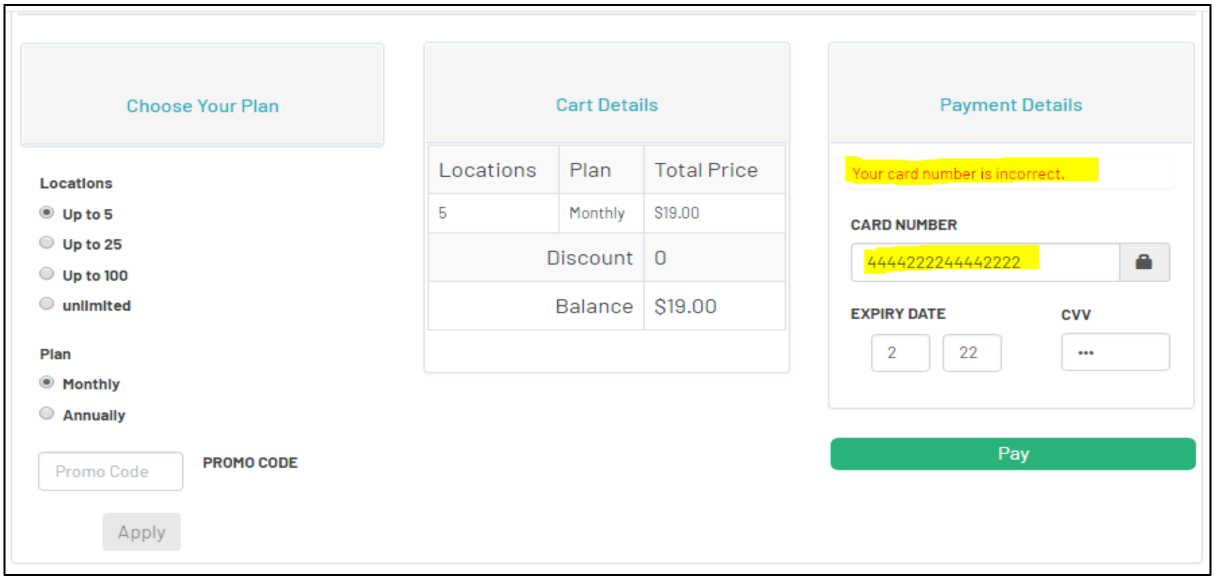


Figure 11(a): Incorrect payment details

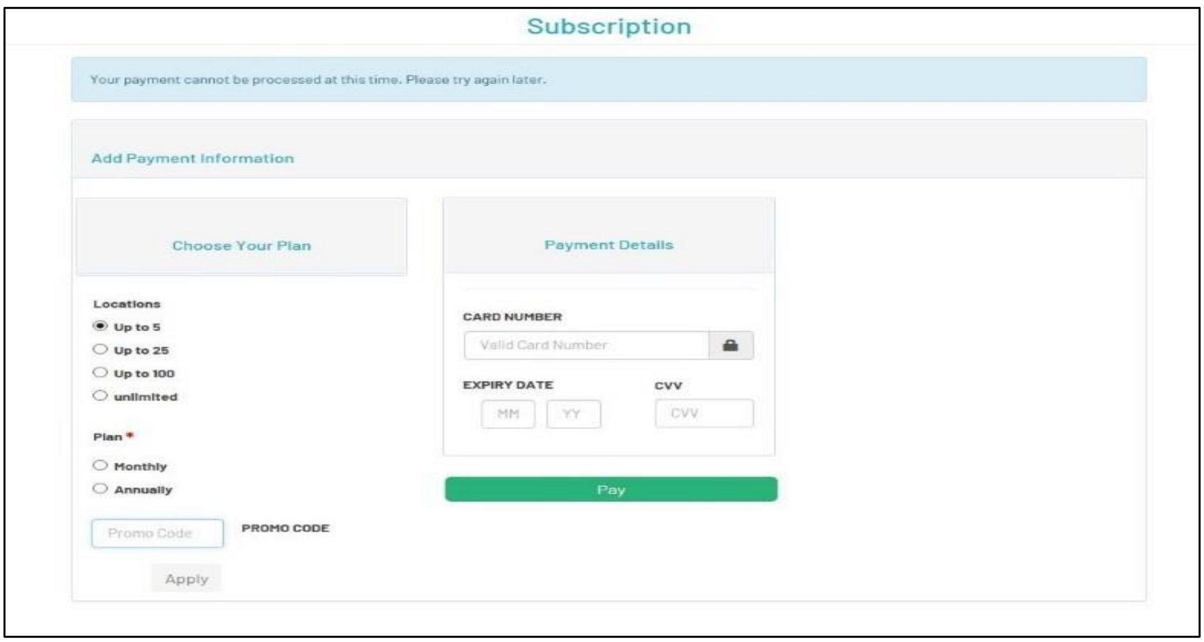


Figure 11(b): Incorrect payment details

Update business Profile

To update business profile, click on My business menu and select button Business profile and seen below, and once you click on it, you will reach the business profile page.

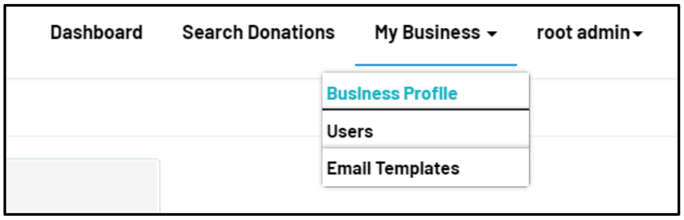


Figure 12: Selecting the option to update business profile

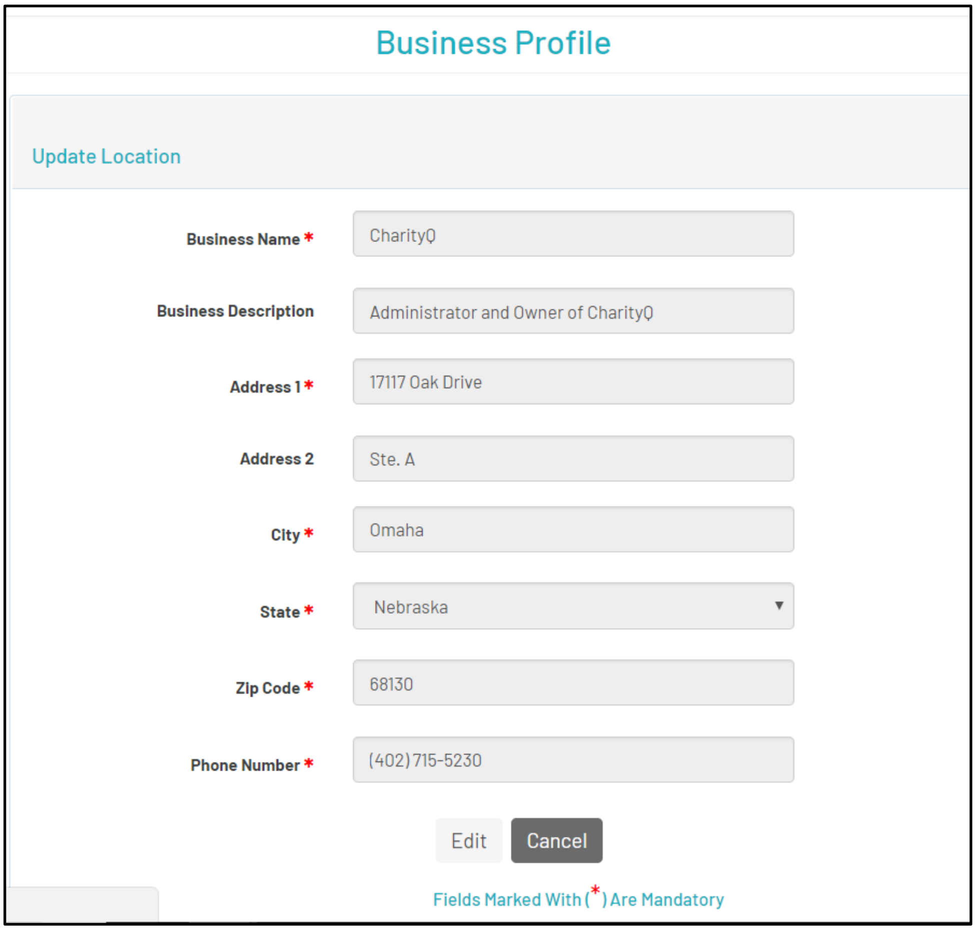


Figure 13: Update business profile

Here on this page you can edit the business details (here business means the owner of charity q which is Tagg) and click on **update** to save the changes.

Donation Preferences

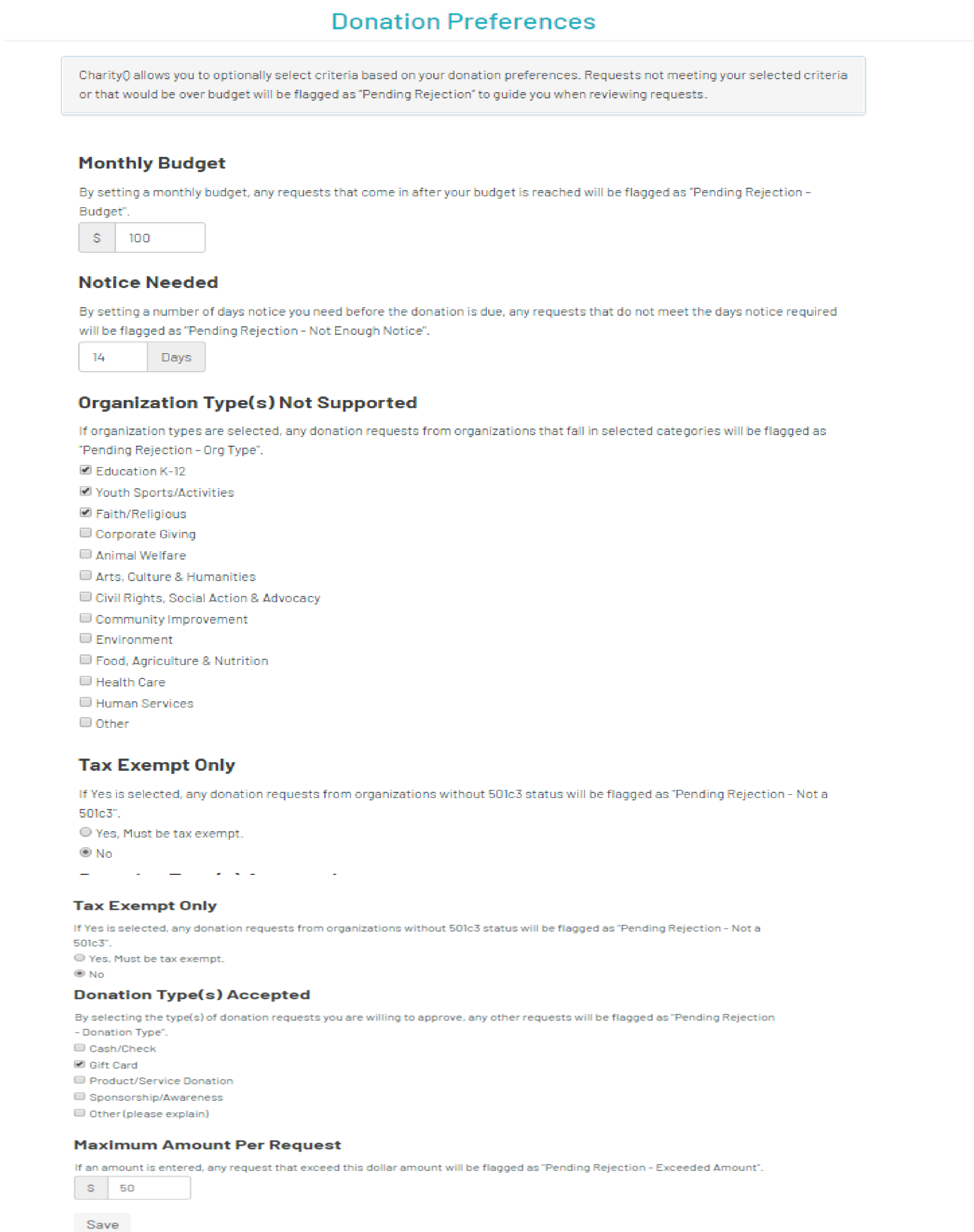
Basic settings are accessible by any user of the CharityQ application. The rules set by the business user apply only to the location the user belongs to.

- The purpose of a **monthly budget** is to define the amount of money available to be used to fulfill donation requests.
- The purpose of **required days' notice** is to set the minimum amount of time it takes for the business to fulfil a donation request.

Global business rules are accessible by the business admin user only. The rules set by the business admin user are applied to all business units, or locations.

- **Auto-Reject**: Donation Requests that fit within auto-reject rules are marked as rejected when they are processed by the rules engine.
- **Pre-Accept**: Donation Requests that fit within pre-accept rules are marked as pending approval when they are processed by the rules engine.

Note: If a donation request does not fit the rules for Auto-Reject or Pre-Accept it will display on the dashboard as Pending-Rejection



Donation Preferences

CharityQ allows you to optionally select criteria based on your donation preferences. Requests not meeting your selected criteria or that would be over budget will be flagged as "Pending Rejection" to guide you when reviewing requests.

Monthly Budget

By setting a monthly budget, any requests that come in after your budget is reached will be flagged as "Pending Rejection - Budget".

$ 100

Notice Needed

By setting a number of days notice you need before the donation is due, any requests that do not meet the days notice required will be flagged as "Pending Rejection - Not Enough Notice".

14 Days

Organization Type(s) Not Supported

If organization types are selected, any donation requests from organizations that fall in selected categories will be flagged as "Pending Rejection - Org Type".

- [x] Education K-12
- [x] Youth Sports/Activities
- [x] Faith/Religious
- [ ] Corporate Giving
- [ ] Animal Welfare
- [ ] Arts, Culture & Humanities
- [ ] Civil Rights, Social Action & Advocacy
- [ ] Community Improvement
- [ ] Environment
- [ ] Food, Agriculture & Nutrition
- [ ] Health Care
- [ ] Human Services
- [ ] Other

Tax Exempt Only

If Yes is selected, any donation requests from organizations without 501c3 status will be flagged as "Pending Rejection - Not a 501c3".

- ○ Yes, Must be tax exempt.
- ◉ No

Tax Exempt Only

If Yes is selected, any donation requests from organizations without 501c3 status will be flagged as "Pending Rejection - Not a 501c3".

- ○ Yes, Must be tax exempt.
- ◉ No

Donation Type(s) Accepted

By selecting the type(s) of donation requests you are willing to approve, any other requests will be flagged as "Pending Rejection - Donation Type".

- [ ] Cash/Check
- [x] Gift Card
- [ ] Product/Service Donation
- [ ] Sponsorship/Awareness
- [ ] Other (please explain)

Maximum Amount Per Request

If an amount is entered, any request that exceed this dollar amount will be flagged as "Pending Rejection - Exceeded Amount".

$ 50

Save

Figure 14: Donation preferences page

Manual Entry for Donation Request

All users can select Manual Entry for Donation Request to generate a donation request form and enter a request for donation to their business manually. This allows users to account for donations made outside of the CharityQ system.

Business locations

The Business Admin can view the parent business and a list of all locations associated with the business.

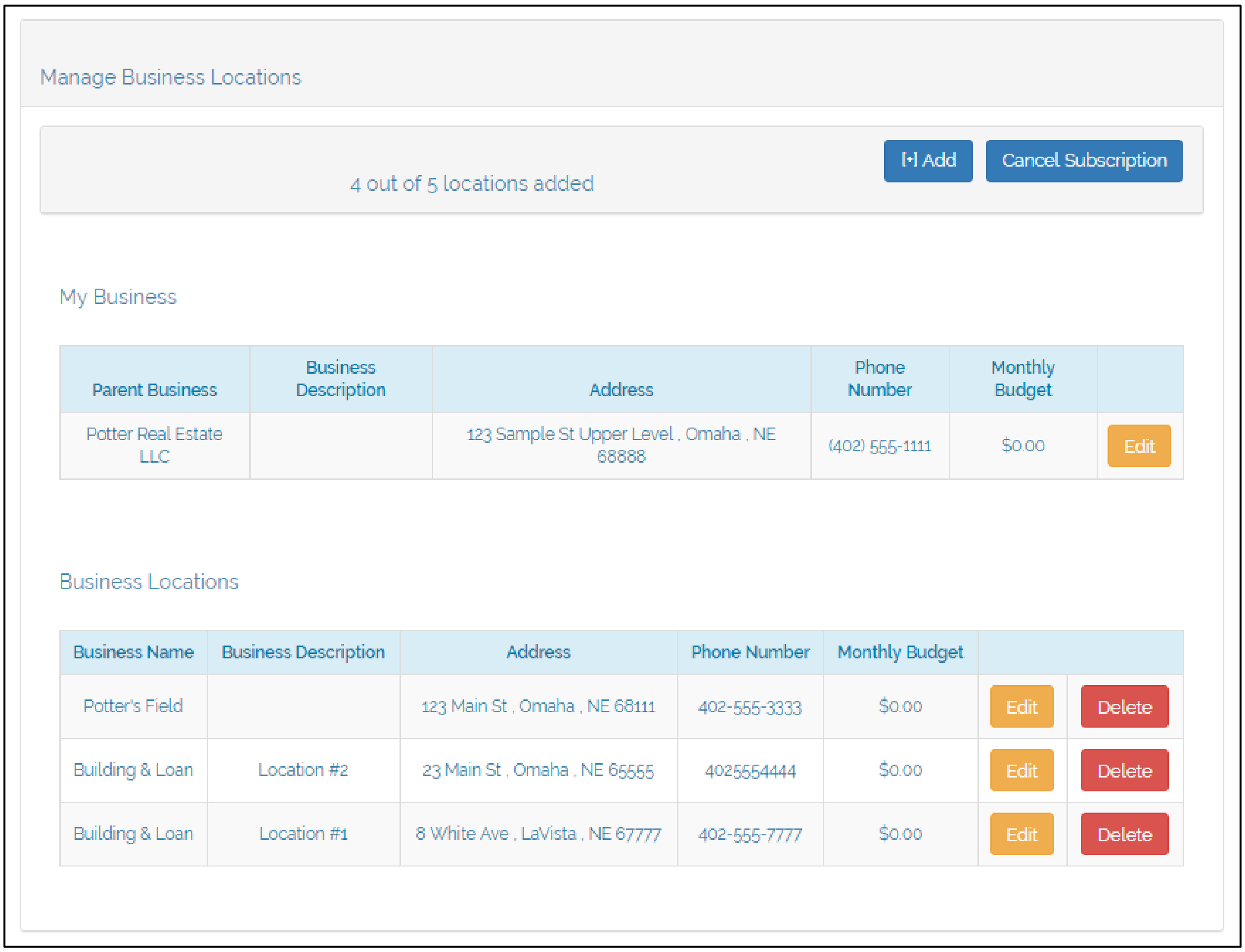


Figure 15: Business locations

- The number of locations previously selected with the business subscription is displayed.
- Select **+ Add** to add another location
- Select **Cancel Subscription** if it is necessary to stop renewal payments
- Select **Edit** to update location information

- Select **Delete** to delete a location

Note: Deleting a location automatically declines all outstanding donation requests.

Add business locations

- Select +**Add**
- **Business Name** is the name that will appear on email notifications sent on behalf of the location.
- **Business Description** is the optional name that appears internally to differentiate business locations if all locations have the same Business Name.
- Enter the Address and Phone Number of the Location
- Select **Add Business Location** to save the new location and return to the list of locations.
- Select **Cancel** to disregard what was entered and return to the list of locations.

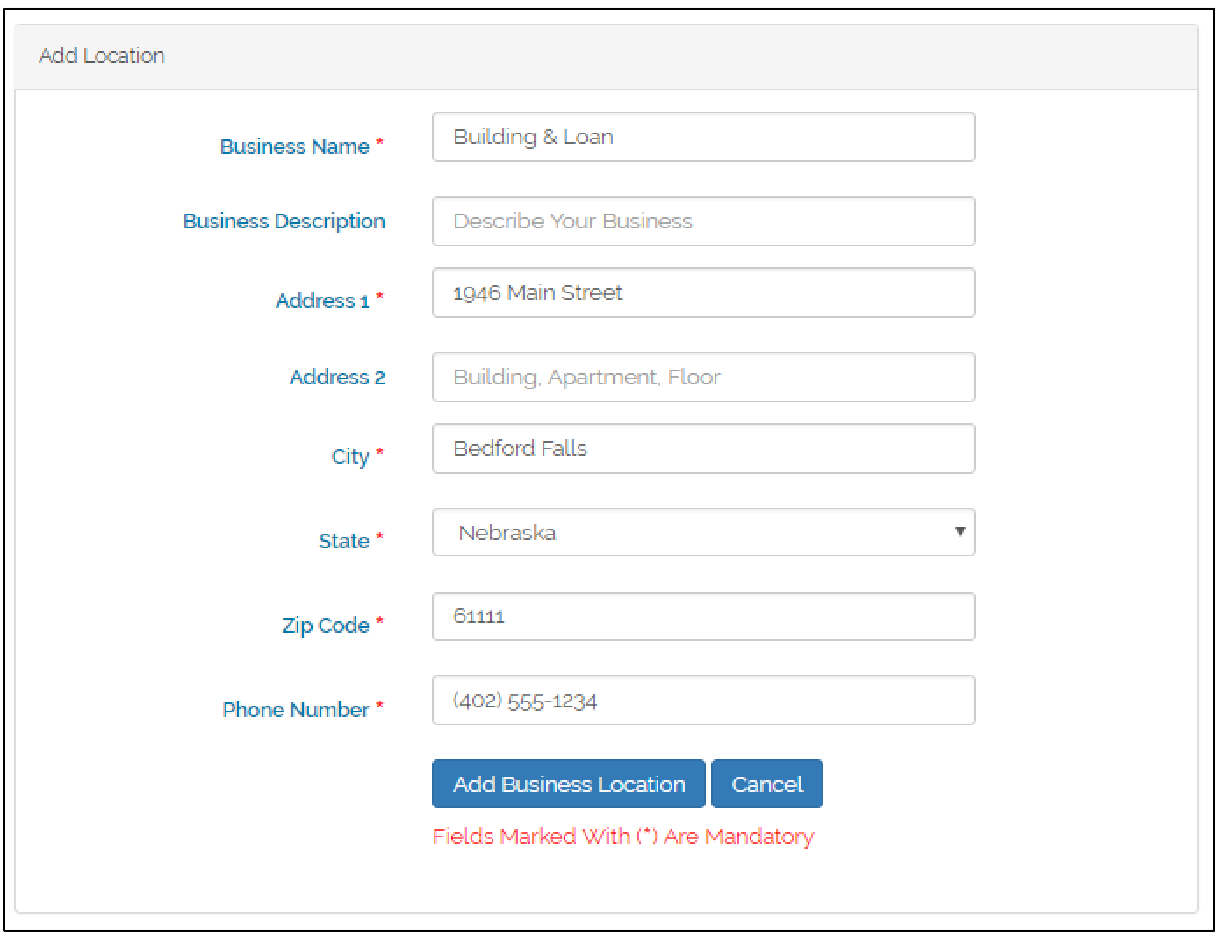


Figure 16: Add Business location

Edit Business Location

This **Edit** function is only available to the Business Admin. Location Managers can edit their business information by selecting **Business Profile** from the **My Business** menu.

- Select **Edit** to the right of the parent business or any business location

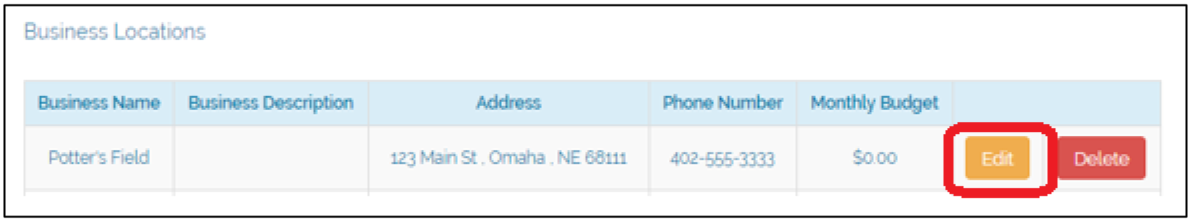


Figure 17: Edit Business location

- Update fields as needed.
- Select **Save** to save information and return to Business Locations.
- Select **Cancel** to discard updates and return to Business Locations.

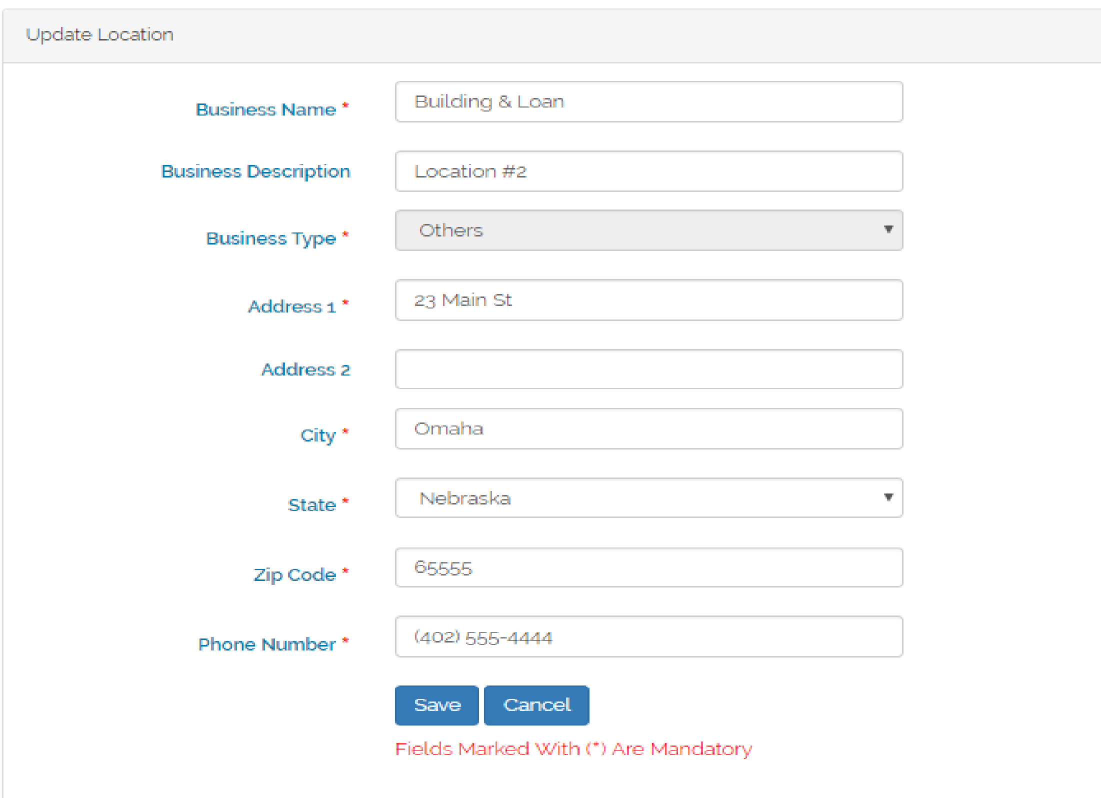


Figure 18: Save updated Business location

Generate URL for Donations

Generate URL for Donations displays at the top of the screen

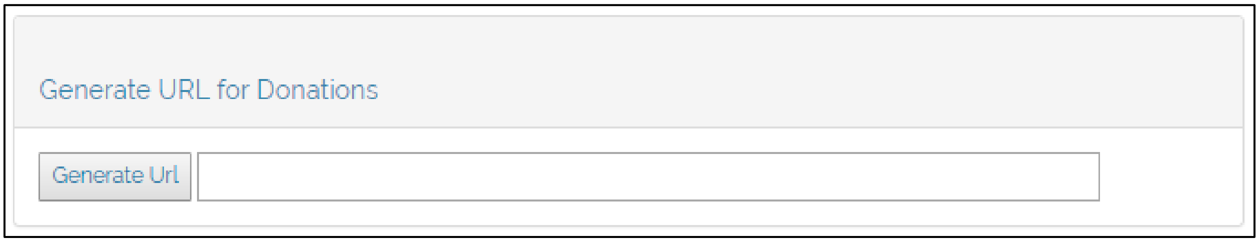


Figure 19: Donation request URL

- Select **Generate URL**
- A link to the donation request form is generated and copied to the clipboard

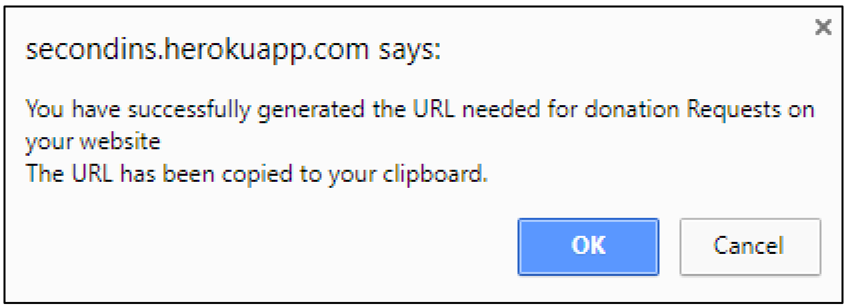


Figure 20: Donation request form confirmation

- The link can be placed on the business location's website within an iFrame and used on social media sites.

Please view the tutorial at https://www.w3schools.com/html/html_iframe.asp for more information about creating an iFrame on a website.

Root user

Root user also called as super user and has the highest privileges available. To mention a few, it can add/edit/delete CharityQ users (both admin and others), Business users (both admin and others), view/ search all the posted donation requests and view businesses subscription status.

Dashboard

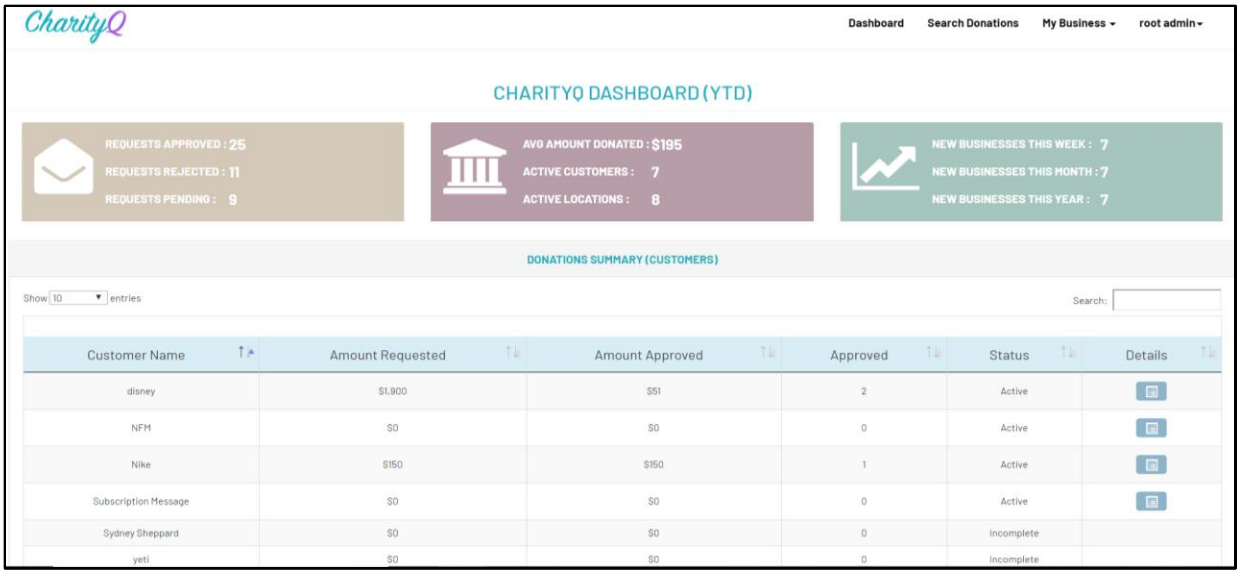


Figure 21: Dashboard for CharityQ root user and CharityQ admin

Here on the dashboard, user can view the business status. Any business has 5 statuses viz. Active, Incomplete, Declined, Pending, and Cancelled.

Four Statuses (Figure 21)

Active: Any business is said to be *'active'* when the user has successfully subscribed to the application and current date is less than the subscription end date.

Incomplete: Business is said to be in '*incomplete'* status if it completes the registration form (New User) but does not complete the payment.

Declined: This business was once active (Existing User) but the renewal of subscription is failed due to incorrect payment details. In this scenario, after the payment is decline, the status would be "Declined". If business user wants to make payment again and payment is successful, then status would be "Active".

Pending: The business is said to be in pending state if it has cancelled its own subscription. In this scenario, business has option to resume its subscription until subscription end date. The pending status would be on the dashboard until the subscription end date.

Cancelled: The business is said to be in cancelled state if subscription expired. In this scenario, business has option to resume its subscription by to choose a plan and make a payment.

Business Location: If business has subscription, it can add the business location, number of locations depend on business subscription plan. Any business location has 2 statuses viz. Active and Cancelled.

Active: Any business location is said to be *'active'* when the parent business has active subscription.

Cancelled: Any business location is said to be *'Cancelled'* when the parent business subscription has expired.

Details: on the dashboard, there is a details column. it shows the details of the main business. Details of business depend on the status of the business. Active, Cancelled, Pending, and Decline statuses have details button in details column. By click on the details button, admin user can see the details of respective business and status of the business location. Status (Active/Cancelled) of business location depend on the parent business status. Incomplete and business locations status don't have the details button.

Add/ Edit/ Delete a user

Note: The add/edit and delete process is same for kinds of users.

Root user has an option to add all the users. To perform this function, root user must click on '*My Businesses*' menu and click '*Users'* from the drop-down list as shown in the screenshot below.

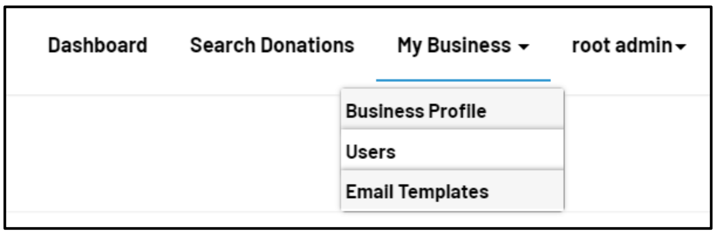


Figure 22: How to see the list of users?

Once the root user clicks on Users option, below page displayed.'

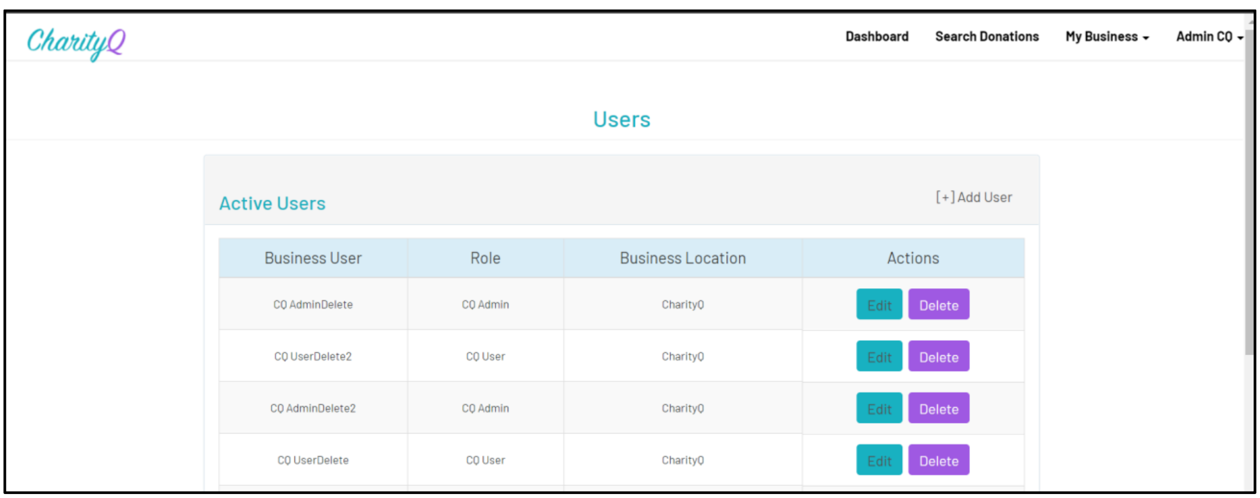


Figure 23: List of users as seen by CharityQ admin or root user

Delete the user:

To delete a user, click on the red Delete button on the Users page and you get a pop up as show below, and click on OK to permanently delete the user.

Figure 24: Active users list. The Delete button deletes a user

Figure 25: Pop-up to delete an image

Edit a user:

To Edit any user, click on Edit button against the user you like to *'Edit'* on the Users page. An editable form opened. The first name, last name, email address, business location can be changed. Also, user role can be updated dynamically as seen in the screenshot below,

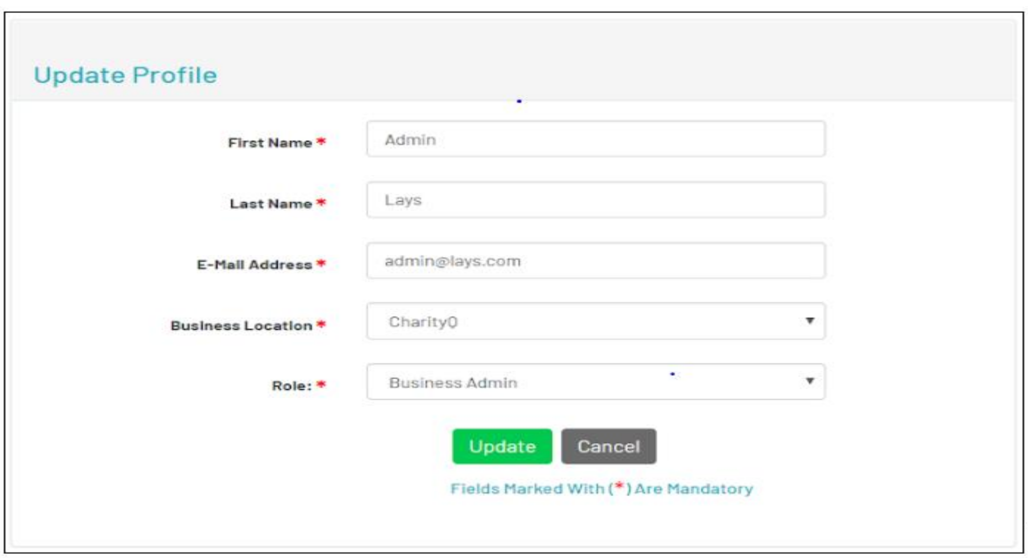


Figure 26: Edit user details

Add a user:

A new user can be added by clicking on **Add user** button on User's page. Once you click on add user button, you are redirected to the page seen below where you fill up all the required information and click on **Submit** to add the user.

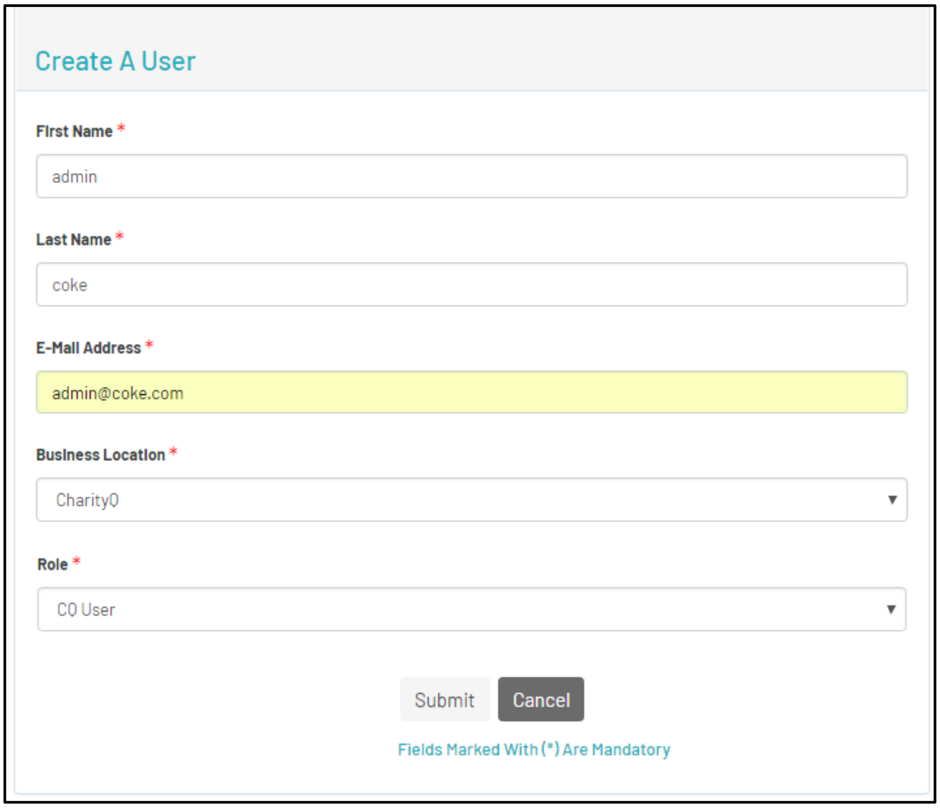


Figure 27: Create a user

Once the user is added, a welcome email is sent to the user's email address and a link to register where he/she can set a new password as seen in the screenshot below,

Figure 28: Email template

When the user clicks on **Start**! link, it is redirected to a webpage that asks to reset/create password.

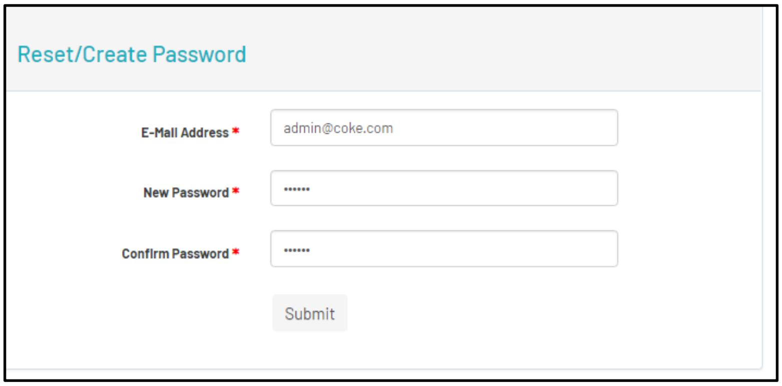


Figure 29: Reset/Create Password

Here user is asked re-enter the email address and password. Once clicked on Submit, it is redirected to Dashboard.

Search Donations

The root user can search for any donation that is raised by a non-profit organization to any business user. When the user clicks on search donation menu it redirects to the page seen below (*Figure 30)* where user can also sort or search by typing keywords.

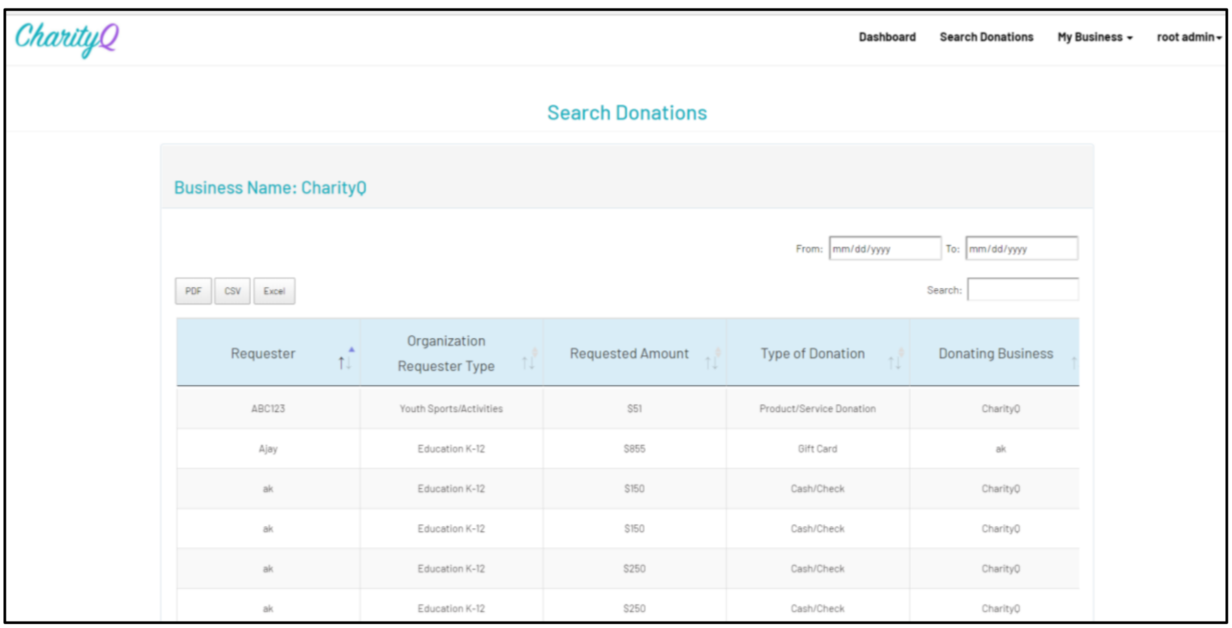


Figure 30: Search donations

CharityQ admin

Dashboard

Here on dashboard, CharityQ admin can view total amount donation, requests approved, requests pending, requests rejected, average amount donated, active customers, active locations (all businesses collectively) and new businesses this week, month and year for statistical purposes.

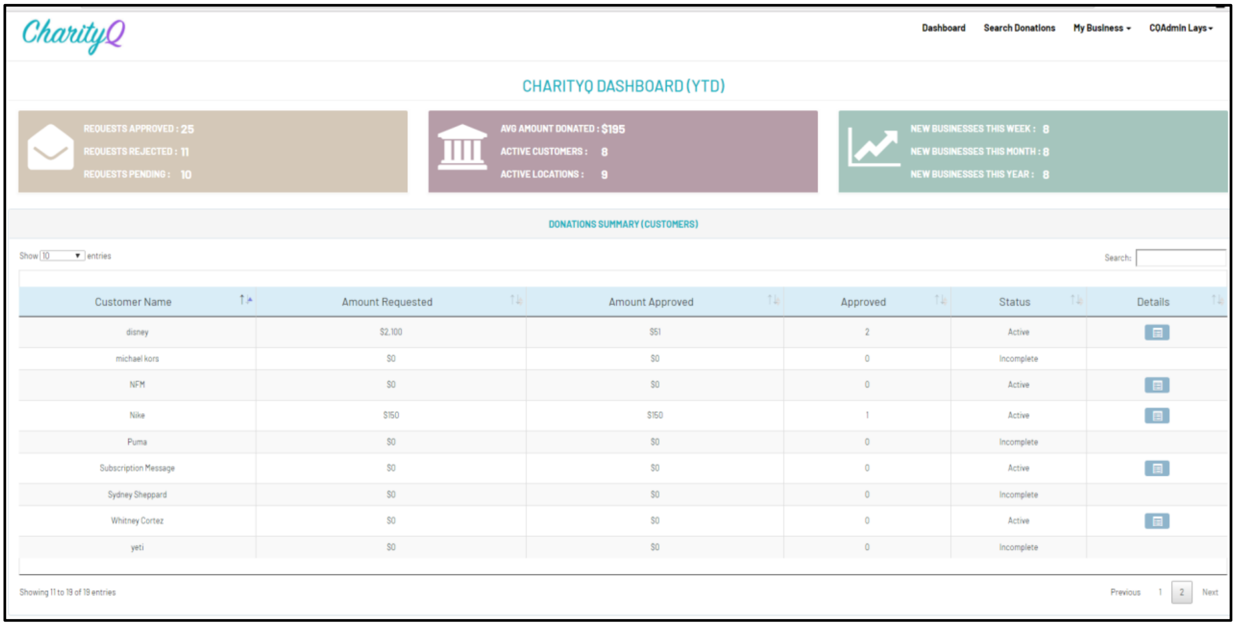


Figure 31: CharityQ admin dashboard

In the pane below, donation summary of each registered business can be viewed. The amount requested is the sum of both requested (pending) and approved amount. The amount approved is the total amount approved by the business. User can also click on details button to view more details about the business.

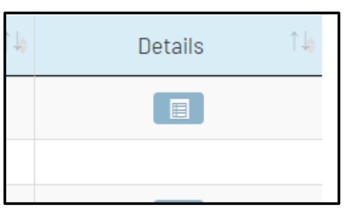


Figure 32: Tab to view the details of an entry

When you click on details, you see more details about business and donations as seen below,

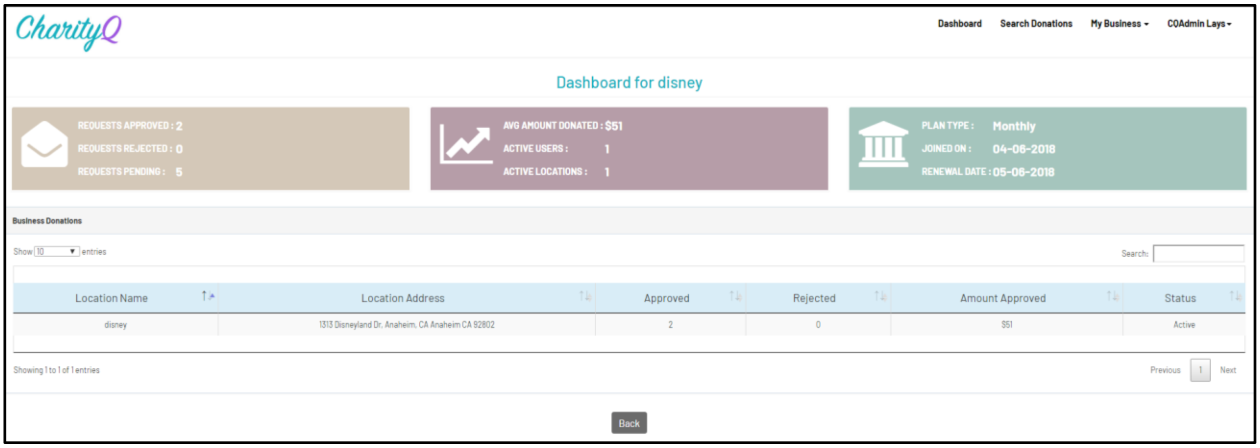


Figure 33: On clicking details (in Figure 32)

Search donations

When user clicks on search donations as seen below, it can view the list of all donations raised by the non-profit organizations.

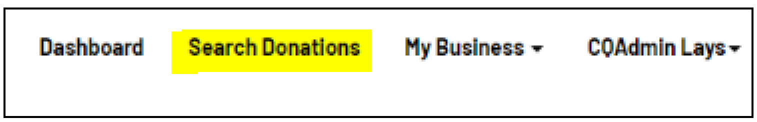


Figure 34: How to search donations?

Requester	Organization Requester Type	Requested Amount	Type of Donation	Donating Business
ak	Education K-12	$250	Cash/Check	CharityQ
ak	Education K-12	$250	Cash/Check	CharityQ
ak	Education K-12	$250	Cash/Check	CharityQ
ak	Education K-12	$250	Cash/Check	CharityQ
Blue Sushi	Other	$150	Cash/Check	Nike
disney	Corporate Giving	$200	Gift Card	disney
lays	Youth Sports/Activities	$100	Cash/Check	disney
lays	Education K-12	$200	Cash/Check	disney
lays2	Education K-12	$200	Cash/Check	disney
NFM	Animal Welfare	$50	Gift Card	CharityQ
Search Requester	Search Organization Req	Search Requested Amou	Search Type of Donation	Search Donating Busin

Figure 35: Searched donation list

On this page, CharityQ admin can not only view the list of all donations (all registered businesses included) but also sort and search donations by typing keywords.

User Profile

When the CharityQ admin user clicks on user profile, it can edit its own user details like name, email and address. Once the admin has made changes, click on save to save changes.

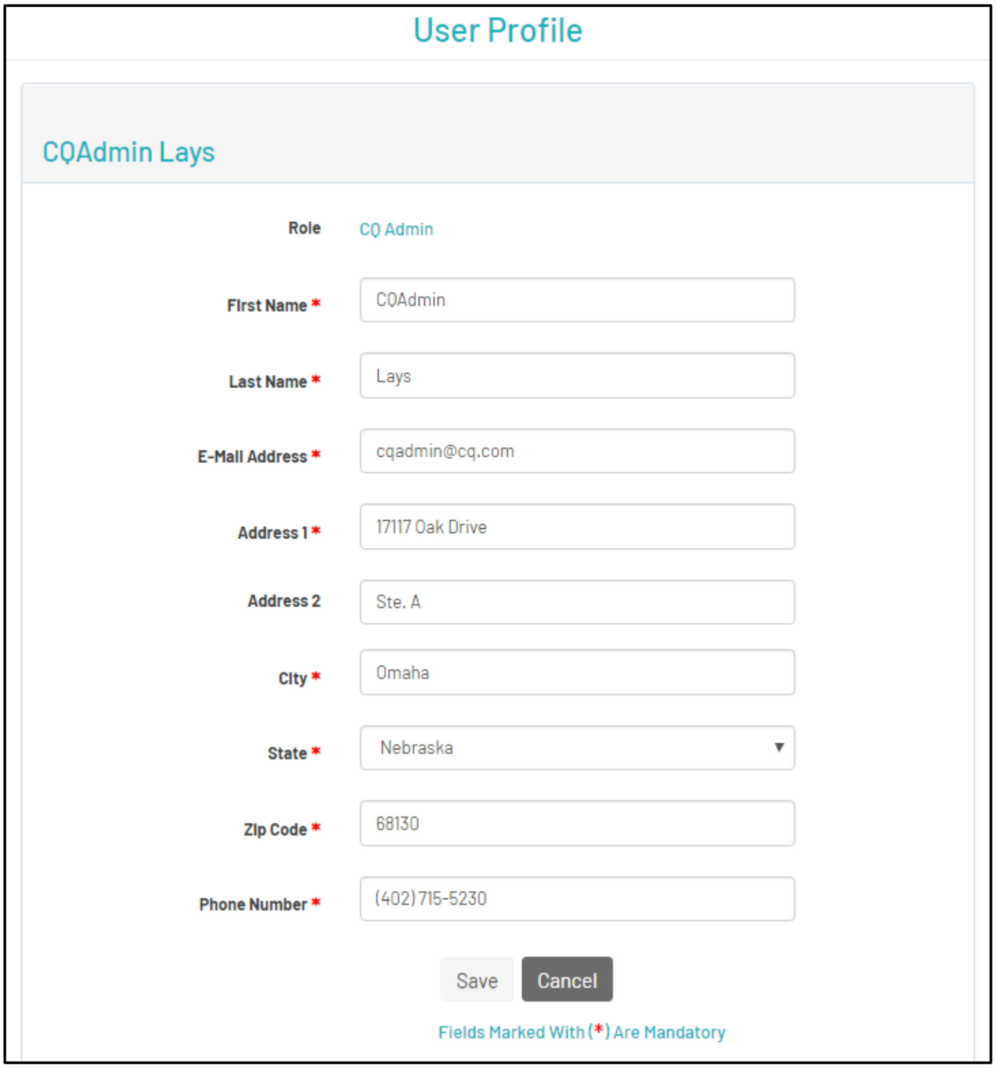


Figure 36: Edit CharityQ user profile

Various dashboards

We have provided with interactive dashboards. All users are directed to the dashboard after logging in to CharityQ.

CharityQ Admin Dashboard

The CharityQ Admin Dashboard is only visible to CharityQ admin users .

Display

- **Average Amount Donated**: Amount of donations approved divided by the total number of approved donations for all businesses.
- **Rejected**: Total number of rejected donations for all businesses.
- **Approved**: Total number of approved donations for all businesses.
- **Pending Donations**: Total number of approved donations for all businesses.
- **Active Customers**: Total number of paid subscriptions
- **Active Locations**: Total number of parent locations + business locations
- **New Businesses This Week**: Total number of paid subscriptions started within the current work week
- **New Businesses This Month**: Total number of paid subscriptions started within the current month
- **New Businesses This Year:** Total number of paid subscriptions started within the current year

Business Information Provided in Table

- **Status**: if the business has a paid subscription
- **Org ID**: The internal number associated with the subscription
- **Organization Name**: The name of the Parent Business
- **Amount Donated**: The total amount of the approved requests by the parent business and all business locations.
- **Total Donations**: The total of the requested amount for all donation requests for the parent business and all business locations.
- **Approved**: The total number of donation requests approved by the parent business and all business locations.
- **Rejected**: The total number of donation requests rejected by the parent business and all business locations.
- **Details**
    - Selecting the **Details** icon takes the **CharityQ admin** user to a list of all Donation Requests associated with a business.
    - The User can select the details of any donation request.

Business Admin/Business User Dashboard

The Business Dashboard is visible to Business Admins and Location Managers

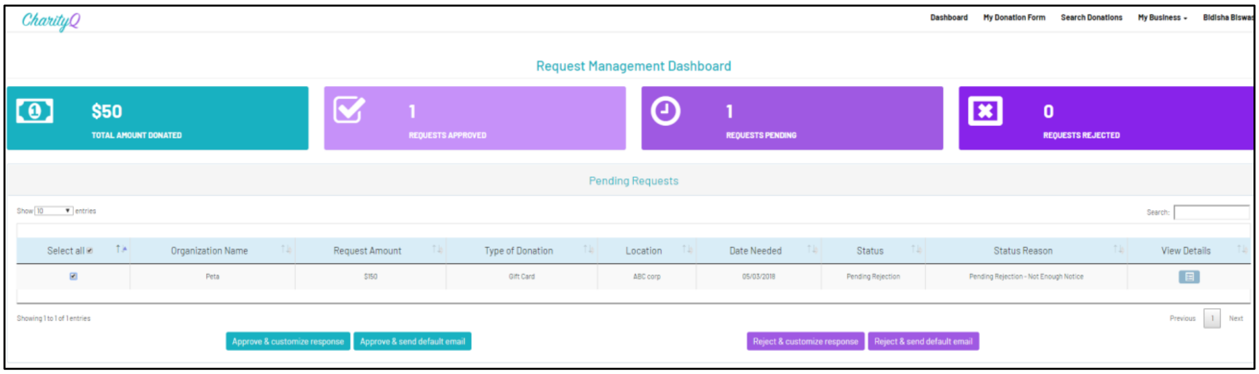


Figure 37: Business dashboards

Display

- Total Amount Donated
- Number of Rejected Requests
- Number of Approved Requests
- Number of Pending Requests

List of Pending Requests

Users can

- Search for a request
- Select multiple requests
- View the details of an individual request
- Approve/Reject individual requests
- Approve/Reject multiple requests

To approve an individual request

- Select **View Details**
- Dollar Amount Approved
  - A user can edit the amount approved prior to approving a request
  - Once a request is approved, the amount is subtracted from the monthly budget
- Select **Approve**
- The Email Editor will display populated with the Approved Template

- The user can edit the message as needed and select **send**
- The user should return to the dashboard

To approve multiple requests

- Select the checkbox at the front of the requests
- Select **Approve**
- An email will be sent to the donation requestor
- The request amount is deducted from the monthly budget

Email Templates

These are available for both CharityQ and business users.

For Business users

The Business Admin can view a list of all email templates for emails associated with the business. Click on **My Business** and then **Email Templates**

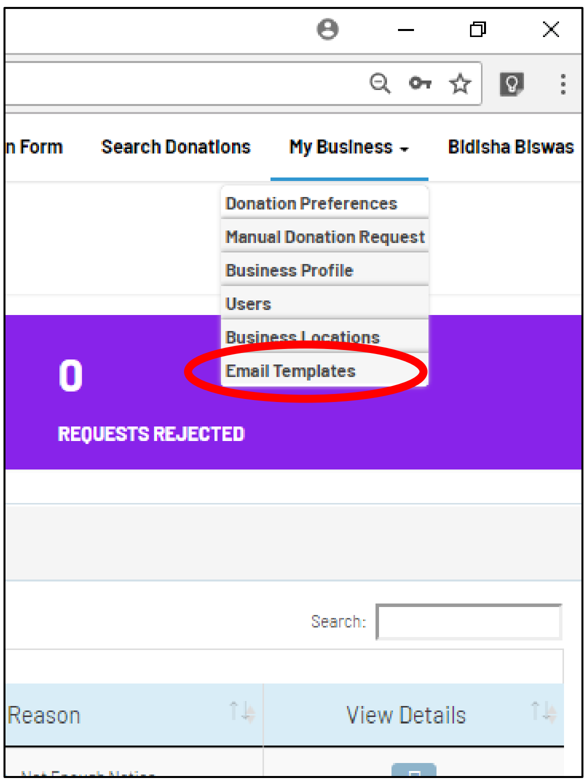


Figure 38: Email templates option

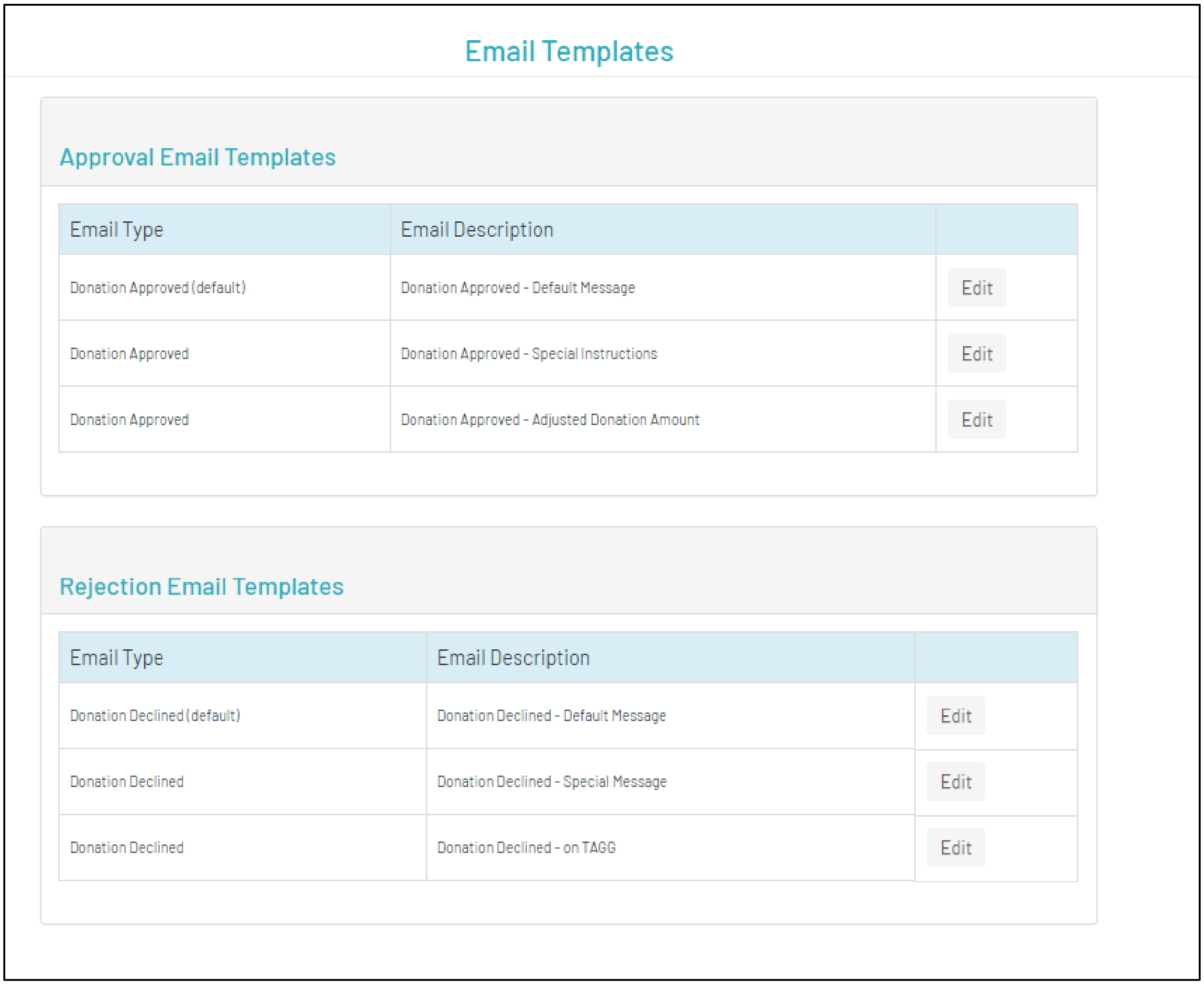


Figure 39: List of email templates

Business admin may edit the templates. Also while approving or rejecting donation requests, business admins/users can either send default emails or customized email for a more personal touch. Users can click on the **Approve & Customize response** or **Reject & customize response** to send customized emails.

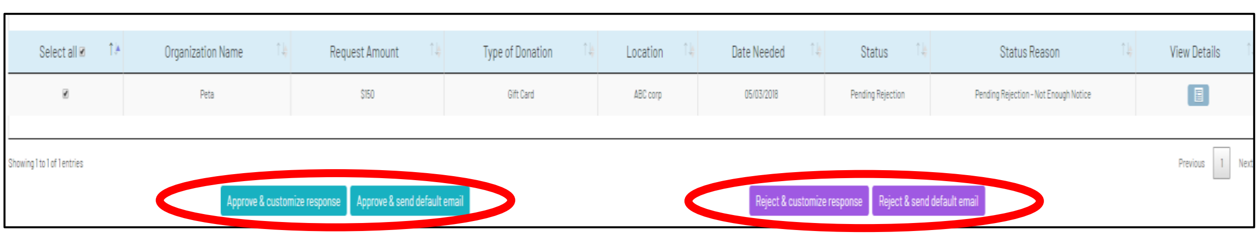


Figure 40: Email response

- **Donation Request Approve** is the email sent when a donation request is approved
- **Donation Request Reject** is the email sent when a donation request is rejected.

When the user is sending custom emails the Requester name and business names are prefilled. Only the subject and content needs to be changed.

- **Email Subject** displays on the subject line in the recipient's inbox
- **Placeholders** can be set to personalize the email
- Select **Update** to save the message and apply it to all locations
- Select **Cancel** to discard changes and return to the Communication Template list.

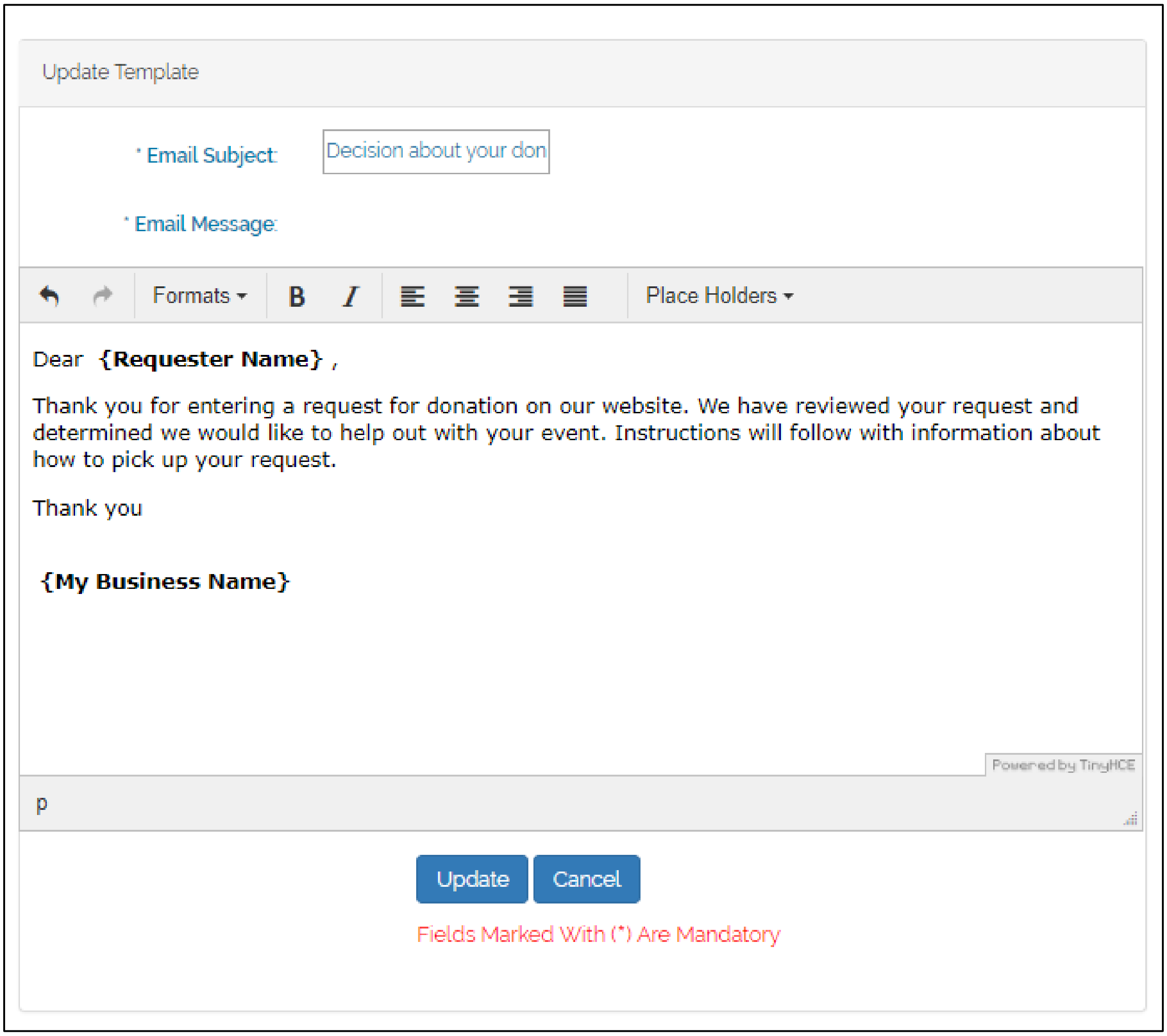


Figure 41: Create customized emails

Login and logout

Click on Login from the splash page to redirect to the Login Page.

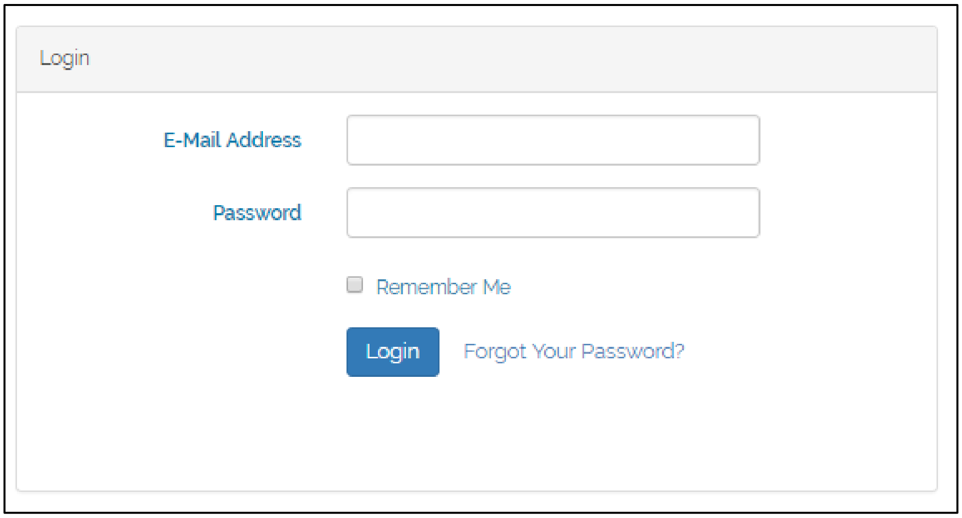


Figure 42: Login screen for all users

If the user wants to logout, user may click on **Logout.**

Forgot password

In case do user does not remember the password, user may click on **Forgot password**. The below screen opens prompting the user to change the password.

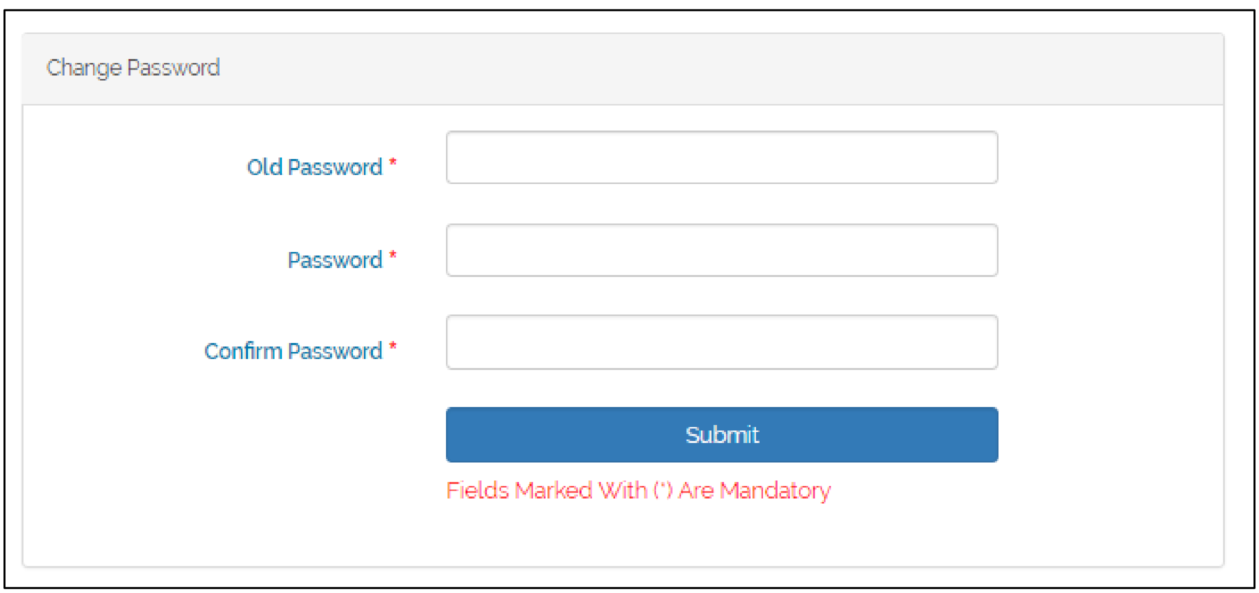


Figure 43: Forgot password/change password screen