

DESIGN DOCUMENT

FAMILY COUNSELING SERVICE – FUNDING

prepared by

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1.0 Project Summary

1.1 The Client

This project is for Family Counseling Service (FCS), a non-profit service organization located at 3518 Washington Boulevard in Ogden, Utah. The primary contacts for this project are Curt Watson, Executive Director, and Raquel Lee, Associate Director. They can be reached at the following email addresses

- Curt: fcscurtwatson@gmail.com
- Raquel: fcsrlee@gmail.com

Additional information about FCS can be found at their website: <http://www.fcshealing.org/>

1.2 Background

As a non-profit organization, FCS relies on grant money and donations of money, services, and items in order to operate and meet the needs of its clients. (Donations of services and items are non-financial donations that are referred to as in-kind donations.) One of the challenges that FCS faces is being able to track and save the information related to grants and donations for accounting and reporting purposes. Currently, FCS appears to be tracking most of this information manually and with Excel spreadsheets.

One of the goals of FCS is to provide services to those in the community with financial need and/or insufficient healthcare resources. As part of the process of accepting patients, FCS looks at an individual's financial situation. Individuals who are below a certain income level are charged a lower rate for services. Based on the individual's income, FCS determines the individual's copayment, and the remainder of the cost of services is provided by funds from grants and donations. This allows FCS to serve those who may not otherwise be able to receive the help and care they need.

1.3 Project Description

The purpose of this project is to create a software system that will enable FCS to more effectively save, use, and report on the information related to grants and donations. The system will include the following core functionality.

Track Donors

FCS will be able to create and edit donors. A donor can be an organization or an individual who issues a request for proposals or gives a financial or inkind donation. The system will allow FCS to save contact information for the donor and connect donors to donations and grant proposals. A donor can be connect to multiple donations and/or grant proposals.

Track Donor Contacts

Since a donor can be an organization (for example, Intermountain Healthcare), the system will allow FCS to save donor contacts, or people at the organization who FCS communicates with. Multiple donor contacts can be connected to each donor.

Setup Donor Reminders

FCS would like the ability to set reminders in the system for donors. For example, if a specific donor attends a specific fundraising event during the year or typically makes a donation during a specific time of the year, FCS would like to set a reminder to send an invitation or solicitation to that donor. A donor can have multiple reminders.

Track Donations

A crucial part of the system will be to track donations. Primarily, donations come in the form of grant money received from a submitted proposal, a financial donation, or an in-kind donation. A grant or a financial donation include a dollar amount. When an in-kind donation is received, such as software development or building maintenance or a furniture donation, FCS researches the value of the donation and assigns it a dollar value. For example, if 20 hours of building maintenance was donated and a typical rate for building maintenance is \$15 per hour, FCS would assign a value of \$300 to that donation.

A donation is either restricted or unrestricted. A restricted donation must be used for a specific purpose. For example, the funds for a restricted donation may be required to be used for a suicide prevention program, which would be the purpose. Those funds should not be used for any other purpose. Unrestricted donations may be used for any purpose at FCS. In the system, a donation can be connected to a purpose.

A donation can also be from an anonymous donor. For example, at a fundraising event, a donor could give a cash donation without providing any information about him or herself. All anonymous donors should not be lumped into the same donation or assigned to the same donor since this would prevent FCS from determining exactly how many donations were made and how many donors made donations.

Insert Purposes and Assign Donations to Purposes

FCS will be able to create and edit purposes in the system. As described above, restricted donations are assigned to a purpose and should only be used for that purpose. According to our contacts at FCS, it is not common for a donation to be assigned to multiple purposes. However, they noted that it was possible and that they would like the ability to divide a single donation among multiple purposes. This will require validation that all the donation money has been assigned to purposes. For example, if a restricted donation of \$1,000 is assigned to multiple purposes, the system should validate that exactly \$1,000 was assigned to those purposes.

Track Expenses and Assign Expenses to Donations

One of FCS's needs is to show how the funds from a specific grant or donation were used. For example, if FCS received a grant for \$10,000, the donor that issued the grant may require FCS to provide an accounting of where and how those funds were used. In the system, zero or many expenses can be attached to a donation to show how the donation funds were used.

In order to track expenses, FCS will be able to create and edit expense types in the system. For example, some expense types could include building rent, supplies, patient visits, employee salaries, etc. Each expense must have one expense type. This process will require validation in the system as well. For example, a donation of \$1,000 should not have more than \$1,000 of expenses attached to it.

Insert a Patient or Client

In addition to this project (FCS Funding), a separate group was assigned to a project with FCS to create a patient billing system. The billing system will track patient information and payments. At the time this document was prepared, FCS did not want our system and the billing system to communicate. However, since one of the important expense types that must be assigned to a donation is a patient visit, this system (FCS Funding) must include some patient/client information. In order to track funds used for patient/client visits, FCS will manually enter a patient's first and last name and his or her ID from the billing system. A patient/client can then be attached to an expense so that the funds used for that patient can be connected to a specific donation.

Track RFPs and Assign an RFP to a Donor

One of the primary ways that FCS receives funding is to submit a grant proposal in response to a request for proposals (RFP) issued by a donor. These typically come from larger organizations such as Intermountain Healthcare or the government. Each RFP has specific requirements that must be met and included in the proposal. Each RFP is connected to a donor and includes a submission due date.

FCS will be able to create and edit RFPs. Tracking this information will allow FCS to see which RFPs they have submitted proposals for, which RFPs they have been awarded funds from, as well as stay organized with the RFPs that are upcoming. When FCS receives funds from an RFP, those funds will be entered as a donation. Since a donor can have multiple donations, some of which are grants and others that are not grants, a donation from an RFP should include the RequestForProposalID. This will enable FCS to link a specific donation with a specific RFP. This is a critical part of tracking how funds from a specific RFP were used.

Track Fundraising Events

In addition to submitting grant proposals and receiving grant awards, FCS also holds fundraising events throughout the year. FCS will be able to create and edit fundraising events in the system. Individuals can purchase tickets to events and make additional donations at the event. These individuals will be added to the system as donors and the money spent on tickets and given during the event will be entered as donations.

Generate Reports

An important function of the system is to generate reports for FCS. FCS would like to generate reports based on different date ranges and criteria. For example, they need to see how the funds from a specific grant were used. This would include the total grant award as well as the expenses that have been connected to the grant. Due to the sensitive nature of the information in FCS reports, copies of specific reports were not provided and are not included in this

documentation. FCS can provide specific examples of reports as needed during the next phase of the project.

1.4 Project Notes

This section includes some notes that may be helpful for the next group to work on this project.

- The prototypes were created using a program called Balsamiq. A free trial of this software can be downloaded at <https://balsamiq.com/download> (The web trial of Balsamiq for the shared google email has been used up unfortunately so you'll need to use a separate email for a web trial or you can take advantage of the trial for the desktop version.)
- Much of our documentation was created and saved on a shared Google account. The username is FCSFunding and the password is WildCats. We discovered during the project that our email was being blocked so although we have been able to use this email for coordination we are unable to use it to contact the Family Counseling Services which means it is necessary to use a separate email for communication.

2.0 Use Case Scenarios

The following section includes four of the eighteen use case scenarios. The remaining use case scenarios are included in the project zip folder.

2.1 Add Client Appointment

Actors:

- System User (Has an existing login)

Triggers:

- The user wants to add an appointment for an existing client.

Preconditions:

- User is logged in.
- The client has already been added to the database.
- User has clicked on the Clients tab
- User has used the drop down menu and has searched by either Client Id, or Client name and has located the client.
- User has clicked on the desired client and the has clicked the "Add Appointment" button.

Post-conditions:

- A new appointment has been added for the existing client.
- The user will be taken back the Clients tab.
- The user will see the new client in the list or can use the drop down menu to search for the newly added client.

Normal Flow:

1. The user will want to add an appointment for an existing client in the database.
2. The user will fill out the information (Grant Name, Session Hours, Cost Per Session, Session Location, Amount Deducted from Grant, Date of Appointment, Notes/Copay) in the "Add Session" Window.
3. The user will click the "Add Session" button and be taken back to the "Edit Client" screen of the client for whom the user had made the new appointment.

Alternate Flows:

- 2A1: The user will cancel adding a new appointment.
4. The user will be returned to the "Edit Client" screen.

2.2 Add New Grant

Actors:

- System User (Has an existing login)

Triggers:

- The user wants to add a new grant.

Preconditions:

- User is logged in.
- User has clicked the "Grants" tab
- User has clicked the "Add New Grant" tab from the sidebar.

Post-conditions:

- A new Grant has been created.
- The user will be taken back the "Grants" tab.

Normal Flow:

1. The user wants to add a grant.
2. User fills out the required information (Grant Name, Amount Received, Date).
3. The user will click the "Save Grant" Button.
4. User will be taken back the "Grants" tab.

Alternate Flows:

- 2A1: The user will cancel creating a grant
2a. The user will be returned to the "Grants" tab.

2.3 Edit User Permissions

Actors:

- System User (Has an existing login)

Triggers:

- The user wants to create a system backup.

Preconditions:

- User is logged in.
- User has authorization to create a system backup.
- User has clicked the administrative tab.
- User has selected "Create Backup" from the sidebar.

Post-conditions:

- A system backup has been created.
- The user will be taken back the "Administrative" tab.

Normal Flow:

1. The user needs to create a system backup.
2. User Select "YES" to create a backup.
3. The user will click the "Done" Button.
4. User will be taken back to the "Administrative" tab.

Alternate Flows:

- 2A1: The user select "NO" to creating a system backup.
2a. The user will be returned to the "Administrative" tab.

2.4 Create New Donor

Actors:

- System User (Has an existing login)

Triggers:

- The user indicates that they want to Create a new Donor

Preconditions:

- User is logged in.
- User has clicked on the Donor tab

Post-conditions:

- A new Donor will be created
- The user will be taken to the Donor tab
- The user will now see the new Donor on the Donor listings under the Donor tab.

Normal Flow:

1. The user will indicate that they want to create a new Donor.
2. The system will present a Donor creation form.
3. The user will fill in the specified fields (Donor Name, Phone, Address, Email, and notes).
4. The user will click the save button.

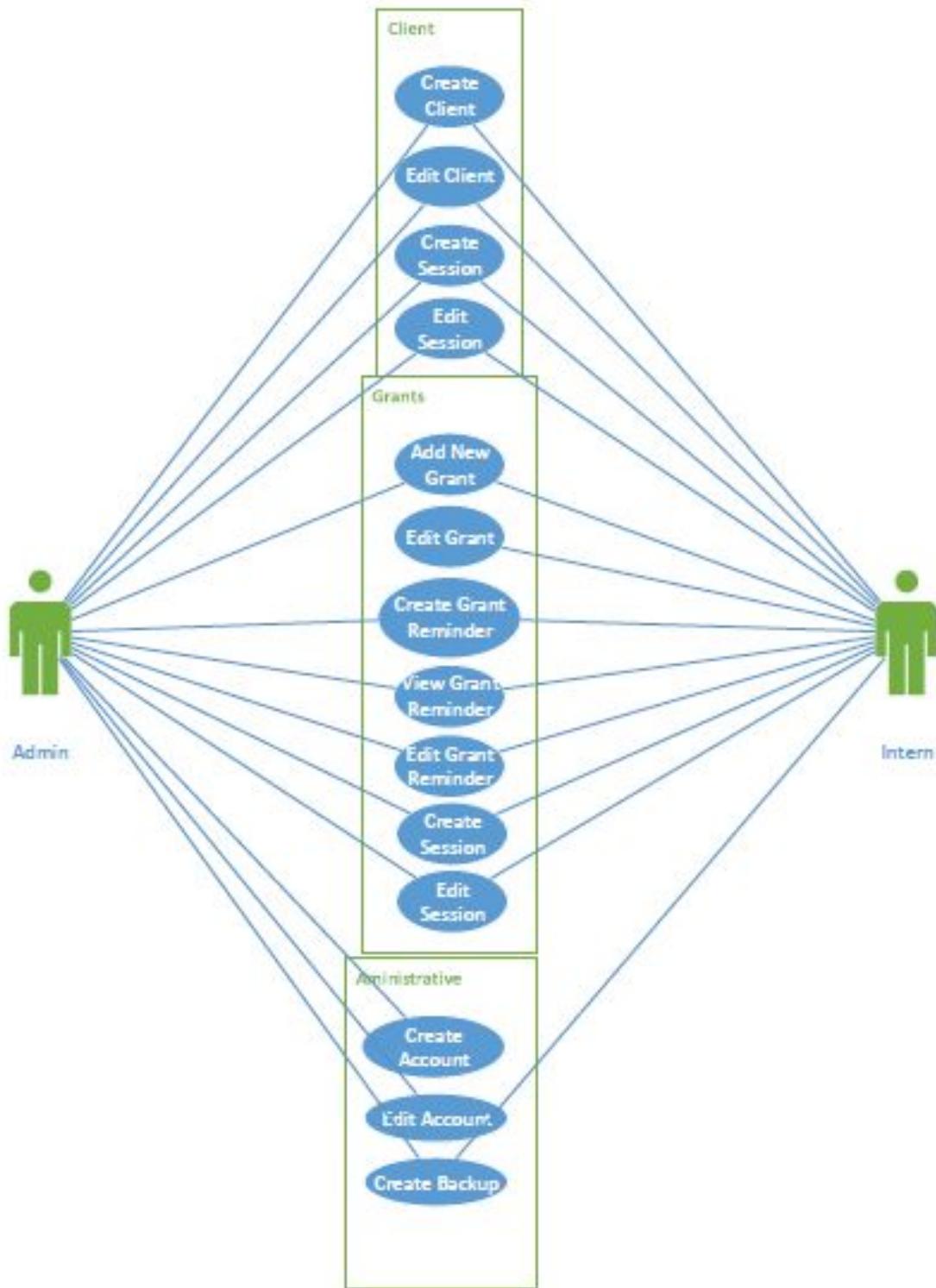
Alternate Flows:

3A1: The user will indicate that they wish to cancel creating a Donor.

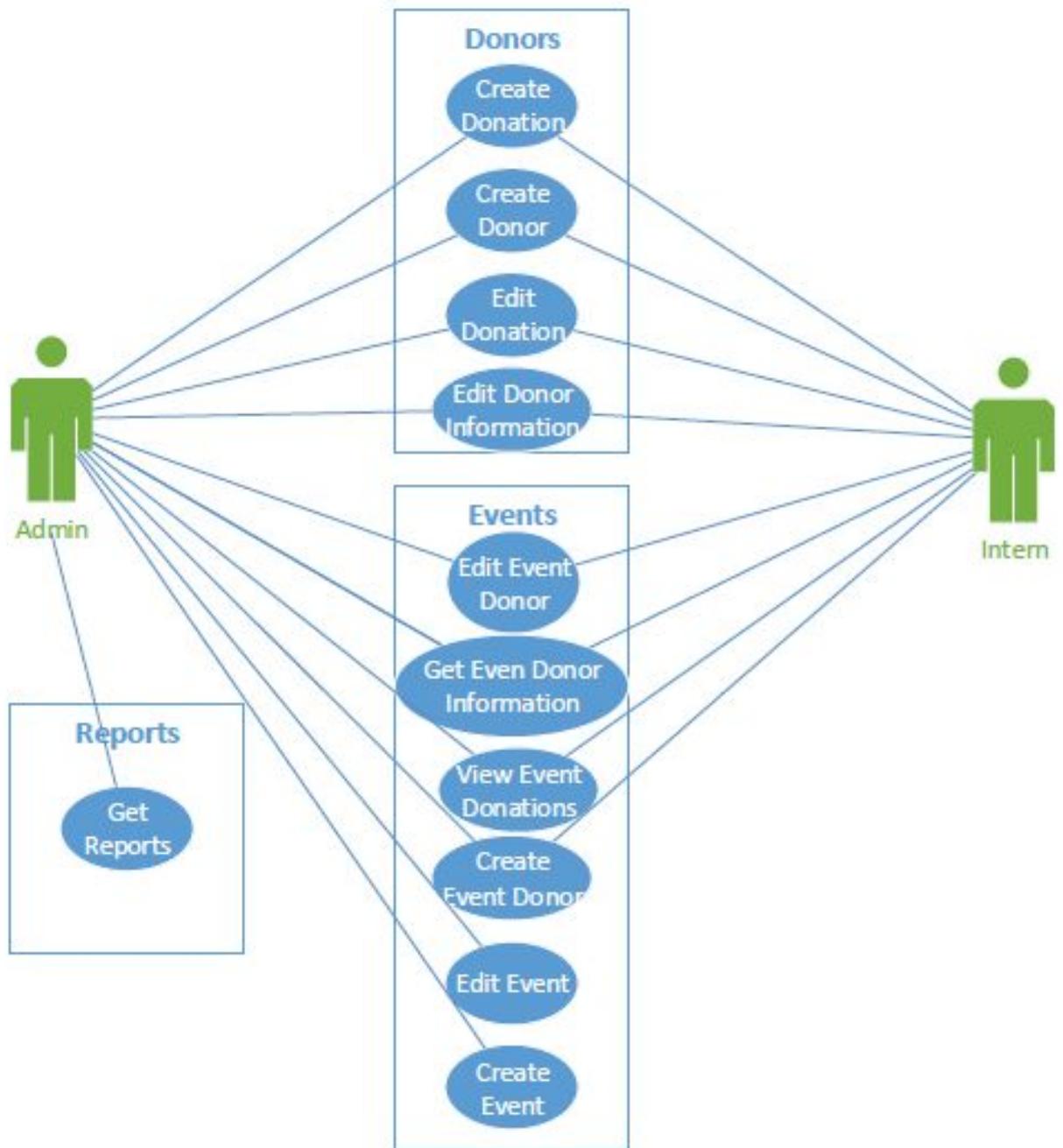
1. The user will click on any other tab to be taken out of Donor creation.

3.0 Use Case Diagrams

3.1 Client, Grant, and Administrative Use Case Diagram

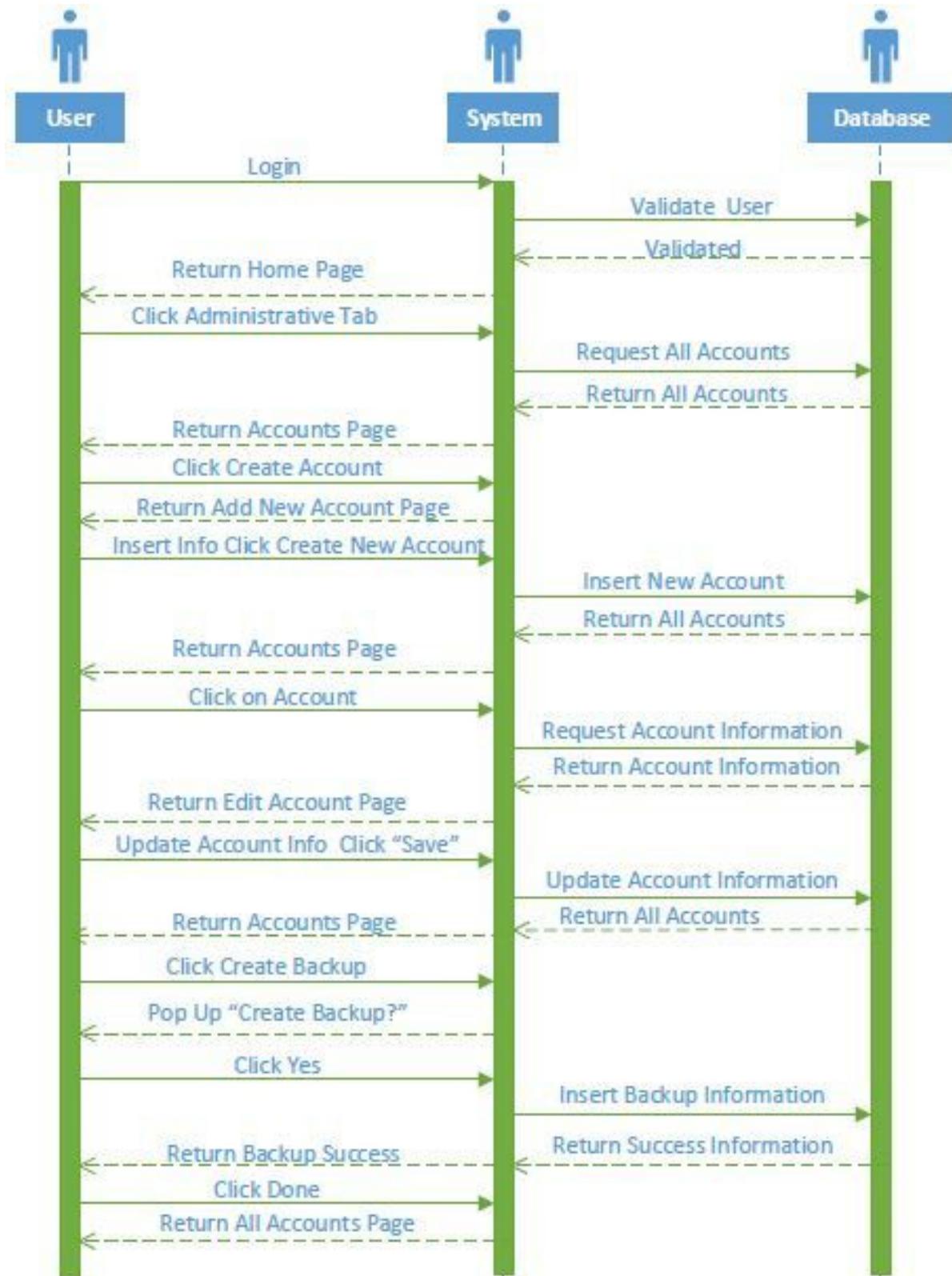


3.2 Donor and Event Use Case Diagram

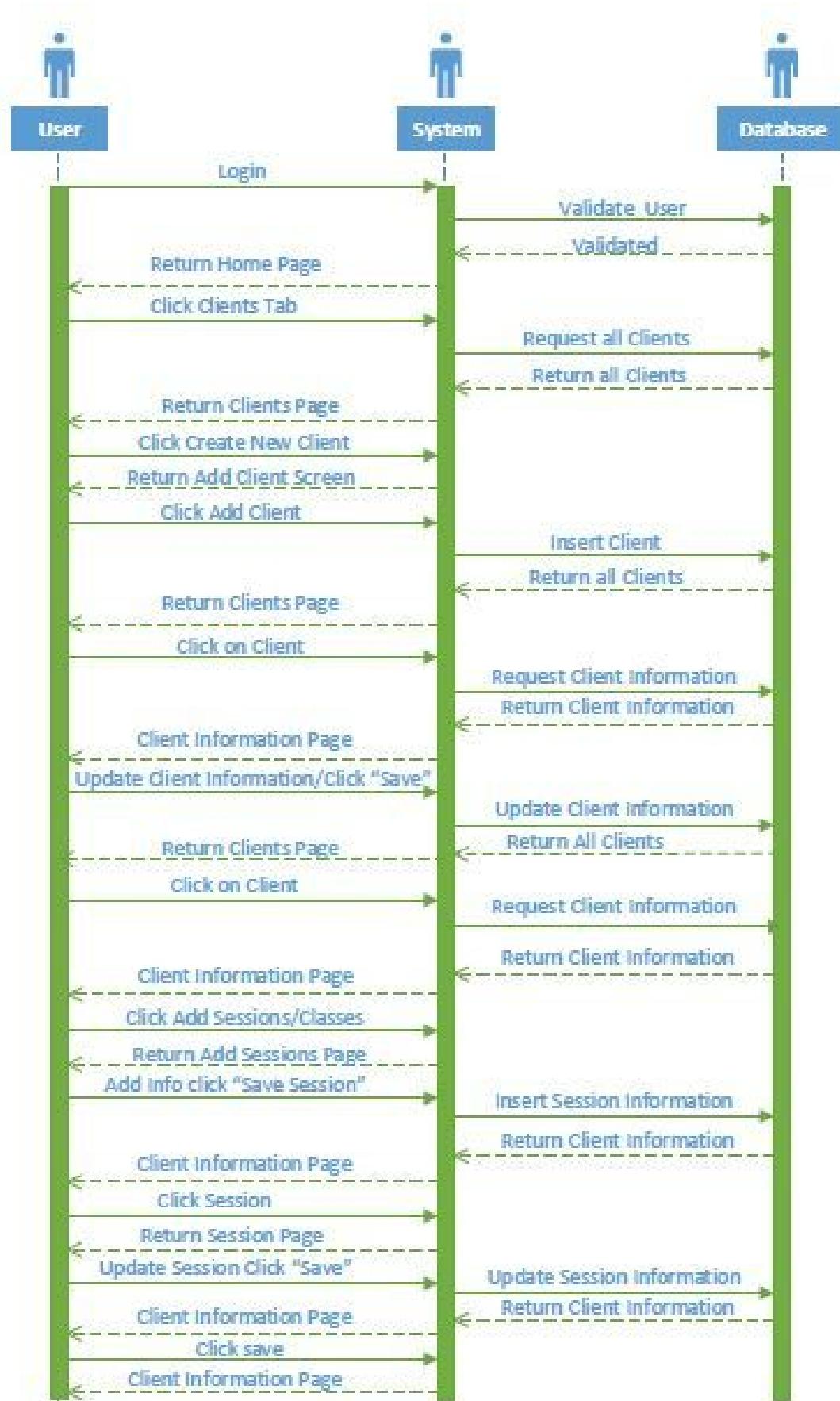


4.0 Sequence Diagrams

4.1 Administrative Sequence Diagram



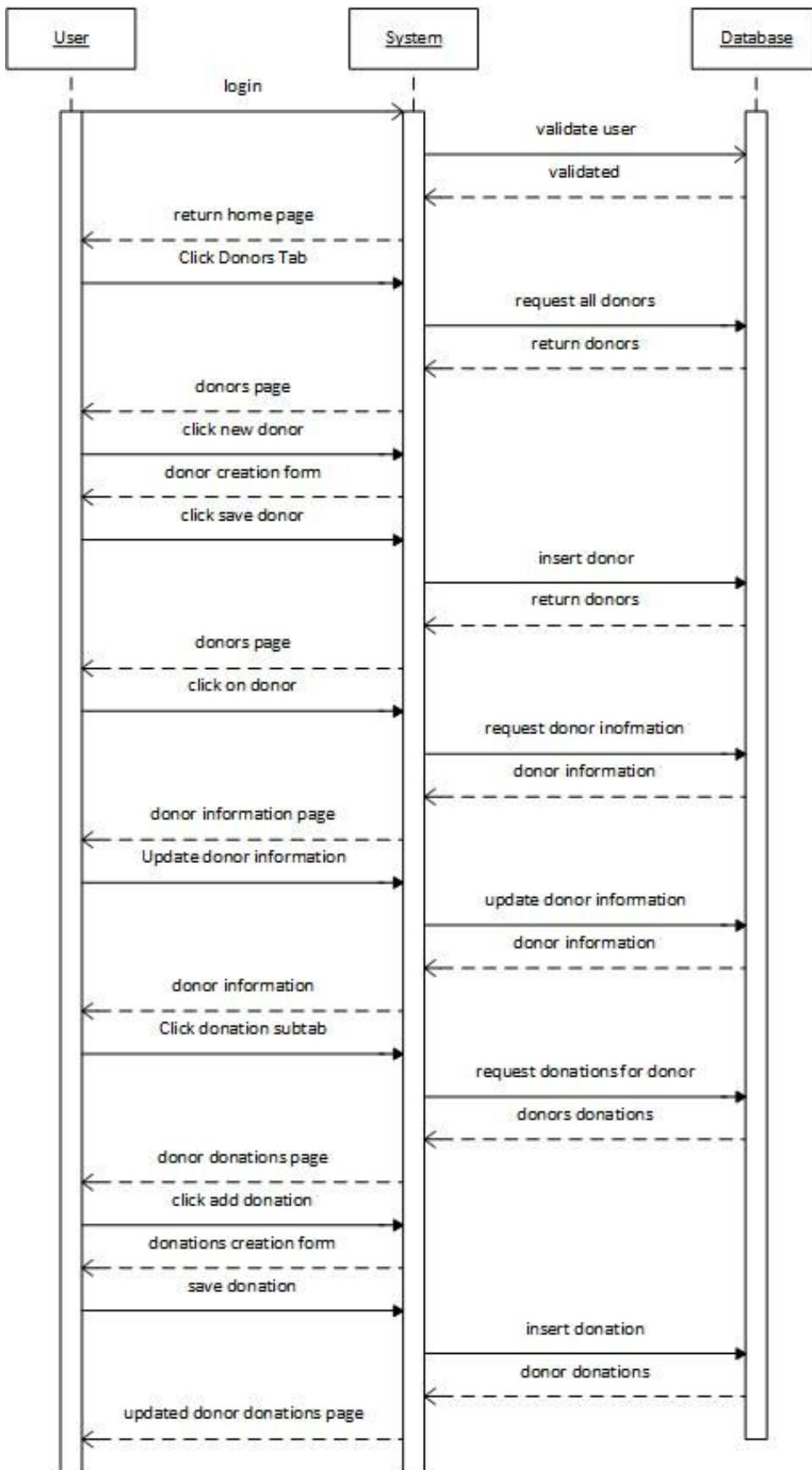
4.2 Client Sequence Diagram



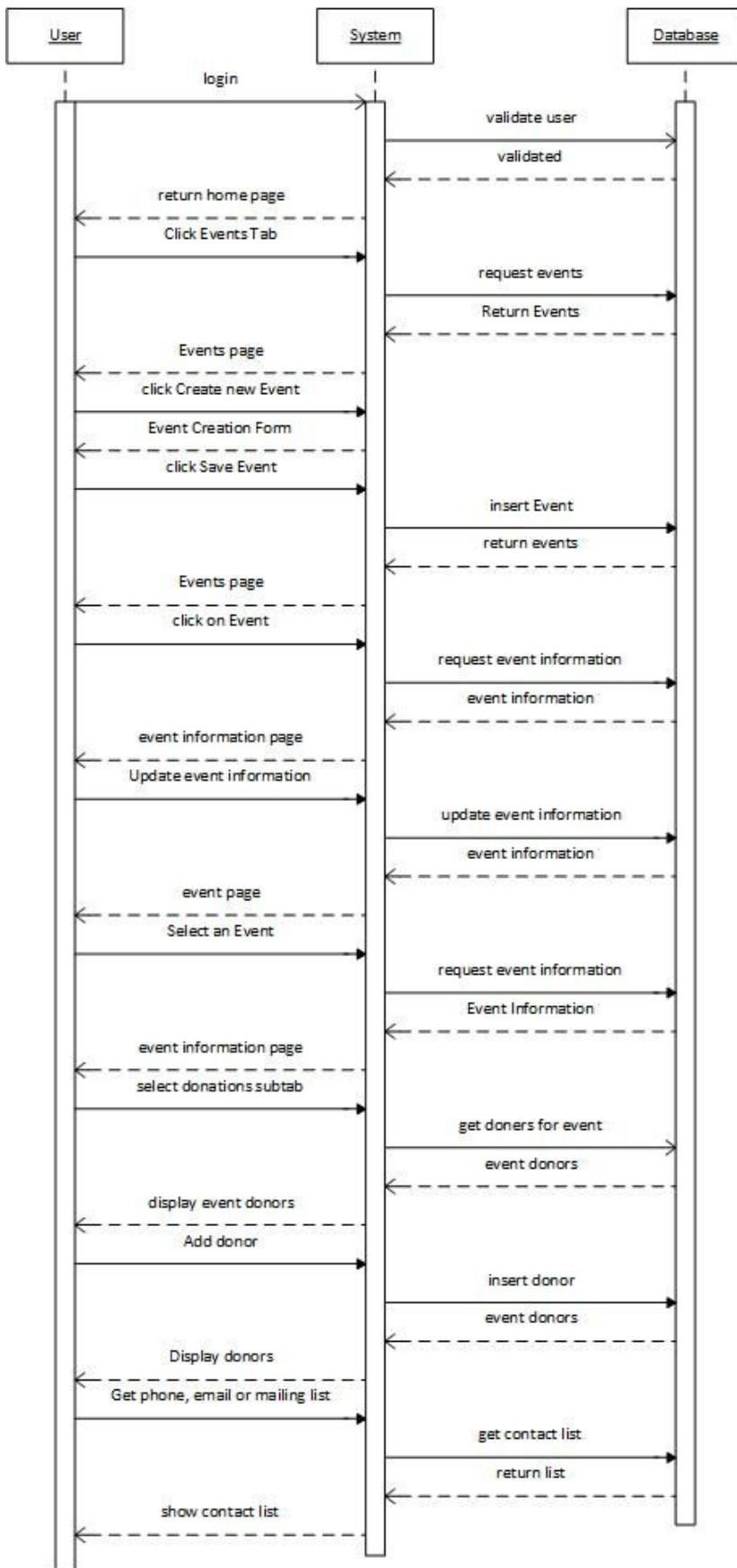
4.3 Grant Sequence Diagram



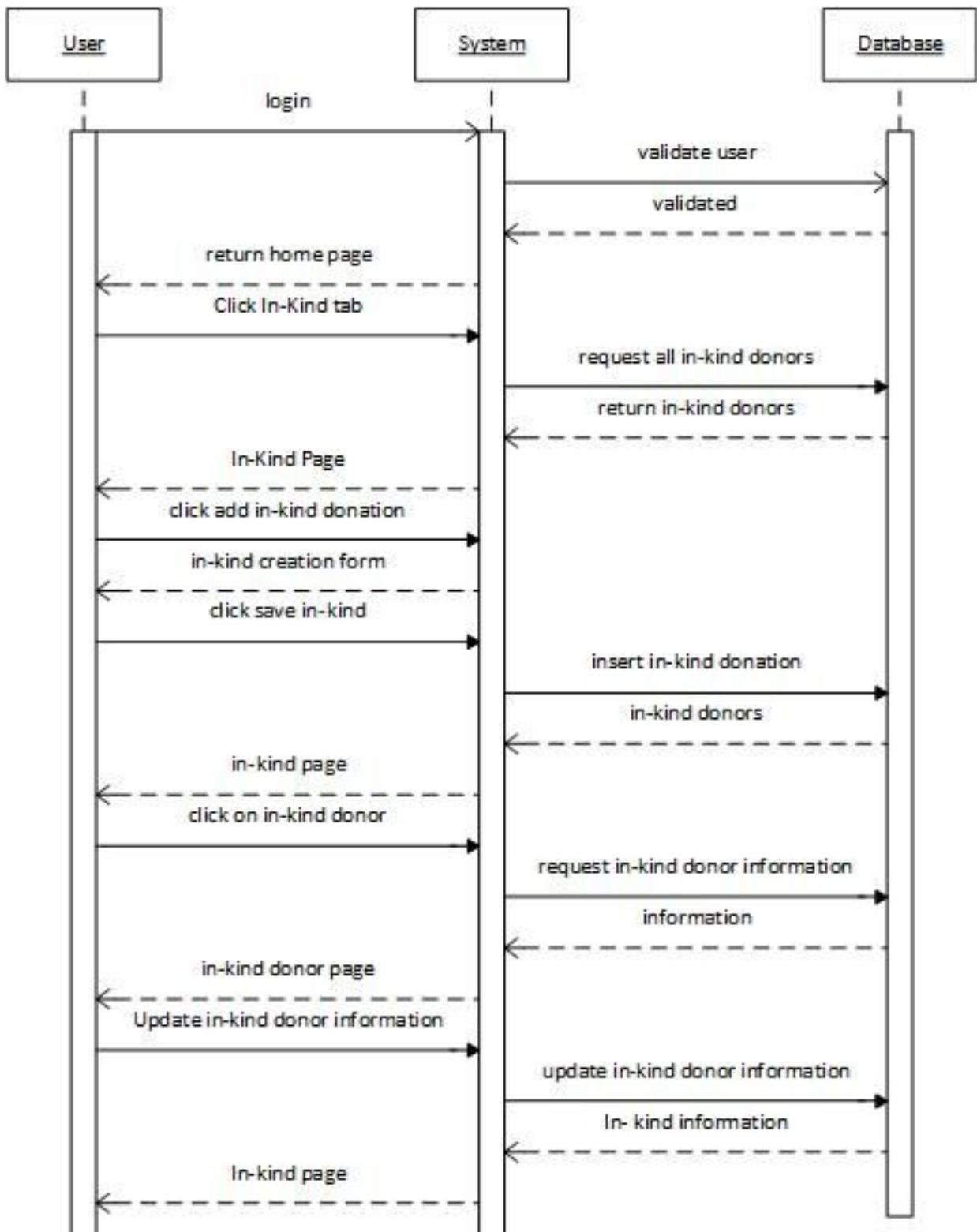
4.4 Donor Sequence Diagram



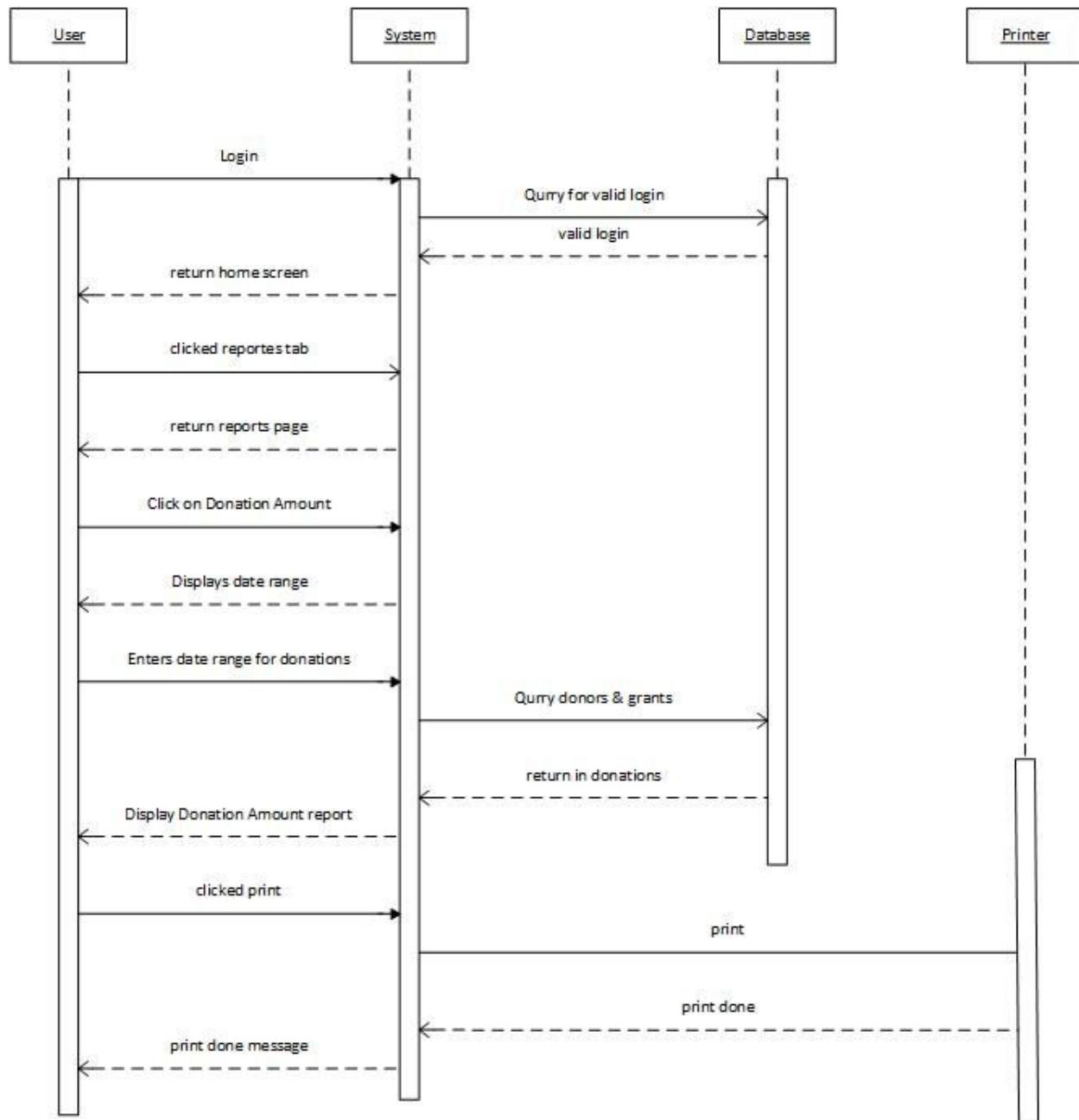
4.5 Event Sequence Diagram



4.6 In-Kind Donation Sequence Diagram



4.7 Reports Sequence Diagram



5.0 Data Dictionary

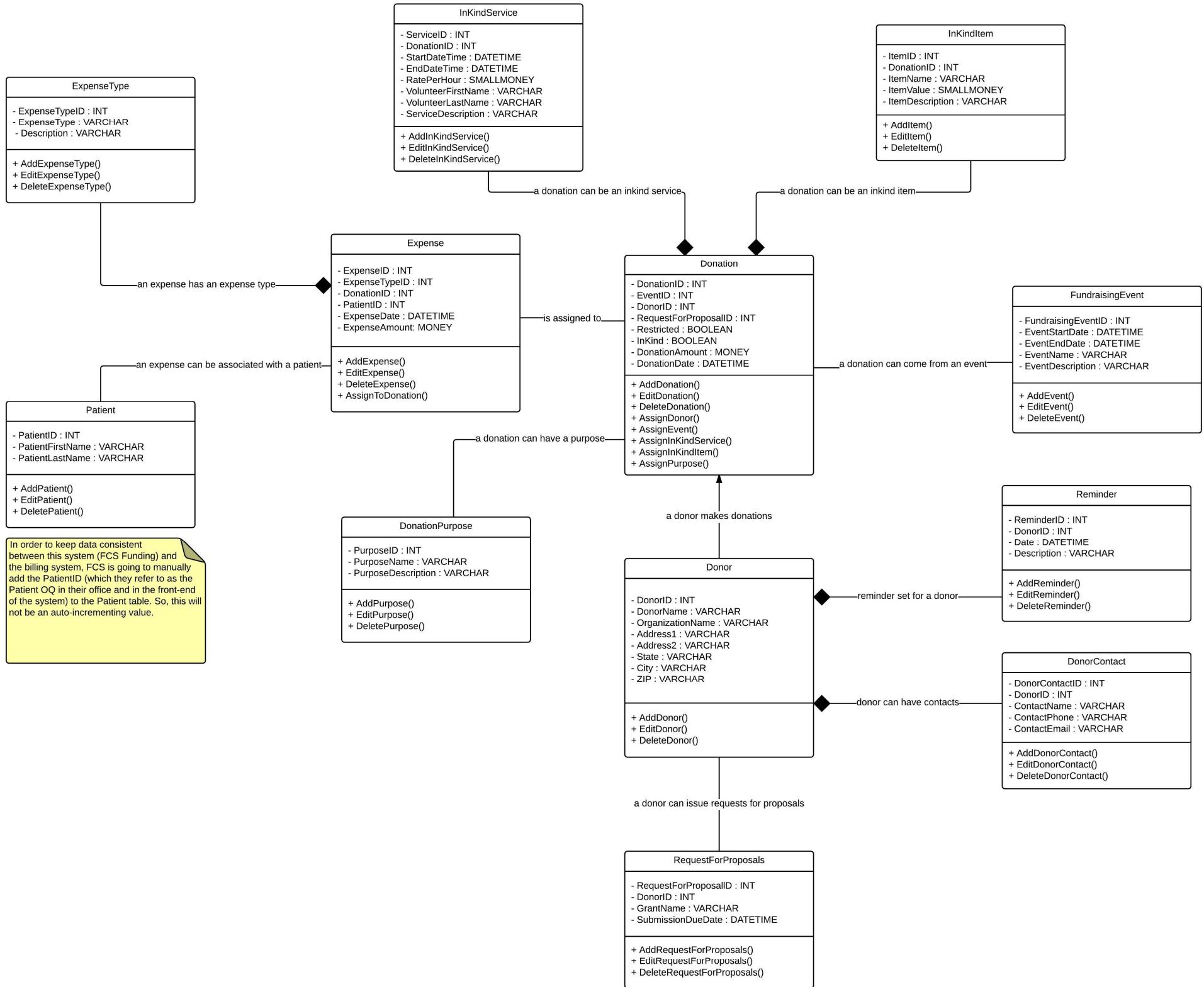
ContactEmail	varchar(max)(Not Null)	Email address of each donor	DonorContact
ContactID	Int (Not Null)	Numeric value used to identify each individual donor	DonorContact
ContactName	varchar(30)(Not Null)	Name of each donor	DonorContact
ContactPhone	varchar(10)(Not Null)	Phone number of each donor	DonorContact
Date	Date (Not Null)	Date on which the reminder is sent	Reminder
DateDonated	DateTime (Not NULL)	Date on which each item is donated	In_Kind_Item
Description	varchar (Null)	Detailed description of the expense type	ExpenseType
Description	varchar(max)(Null)	Description of each individual reminder	Reminder
DonationAmount	Money (Not Null)	A donation is a gift given for the benefit of Family Counseling Services. The donation can take the form of a monetary gift, a grant, a service or item donated, or attendance at an event. This donation amount is specifically a monetary value.	Donation
DonationDate	DateTime (Not NULL)	The date on which the donation was given	Donation
DonationID	Int (Not Null)	Numeric value identifying each donation	Donation
DonationPurposeAmount	Money (Not Null)	The amount of money a specific purpose will receive from a specific grant.	DonationPurpose
DonationPurposeID	Int (Not Null)	The numeric ID defining a specific purpose	DonationPurpose
DonorAddress1	varchar(50)(Null)	Physical Address 1 of Donor	Donor
DonorAddress2	varchar(50)(Null)	Physical Address 2 of Donor (if applicable)	Donor
DonorCity	varchar(max)(Null)	City in which the donor resides	Donor
DonorID	Int (Not Null)	Each donor is given a numeric value through which they are identified	Donor
DonorName	varchar(50) (Not Null)	An individual that gives a donation	Donor

DonorState	varchar(2)(Null)	State in which the donor resides	Donor
DonorZip	varchar(5)(Null)	Zipcode in which the donor resides	Donor
EndDateTime	DateTime (Not NULL)	Ending date and time of service provided	In_Kind_Service
EventDescription	varchar(max)(Null)	Description of each individual fund raising event	FundRaisingEvent
EventEndDate	DateTime (Not NULL)	End date of each fund raising event	FundRaisingEvent
EventName	varchar(50)(Not Null)	Name of each fund raising event	FundRaisingEvent
EventStartDate	DateTime (Not NULL)	Start date of each fund raising event	FundRaisingEvent
ExpenseAmount	Money (Not Null)	Monetary value of each expense	Expense
ExpenseDate	Date (Not Null)	Date each expense is paid for	Expense
ExpenseID	Int (Not Null)	Numeric value identifying each expense	Expense
ExpenseType	varchar (Not Null)	An Expense Type would include things like: Patient Visit, Electric Bill, Building Rent, Supplies, etc.	ExpenseType
ExpenseTypeID	Int (Not Null)	Numeric value identifying each expense	ExpenseType
FundRaisingEventID	Int (Not Null)	Numeric value used to identify each fund raising event	FundRaisingEvent
GrantID	Int (Null)	Numeric value identifying each Grant	Donation
GrantName	varchar(50)(Not Null)	Name of a one time donation with or without restrictions that must be applied for through a grant application process	GrantProposal
GrantProposalID	Int (Not Null)	Each grant is received after FCS sends a request to a donor requesting the grant. The grant proposal ID is a numeric value that identifies each individual grant proposal.	GrantProposal
InKind	Boolean (Not Null)	An in-kind donation is a non-monetary donation that is given in the form of services donated or items donated	Donation
ItemDescription	varchar(max) (Not Null)	Description of item	In_Kind_Item

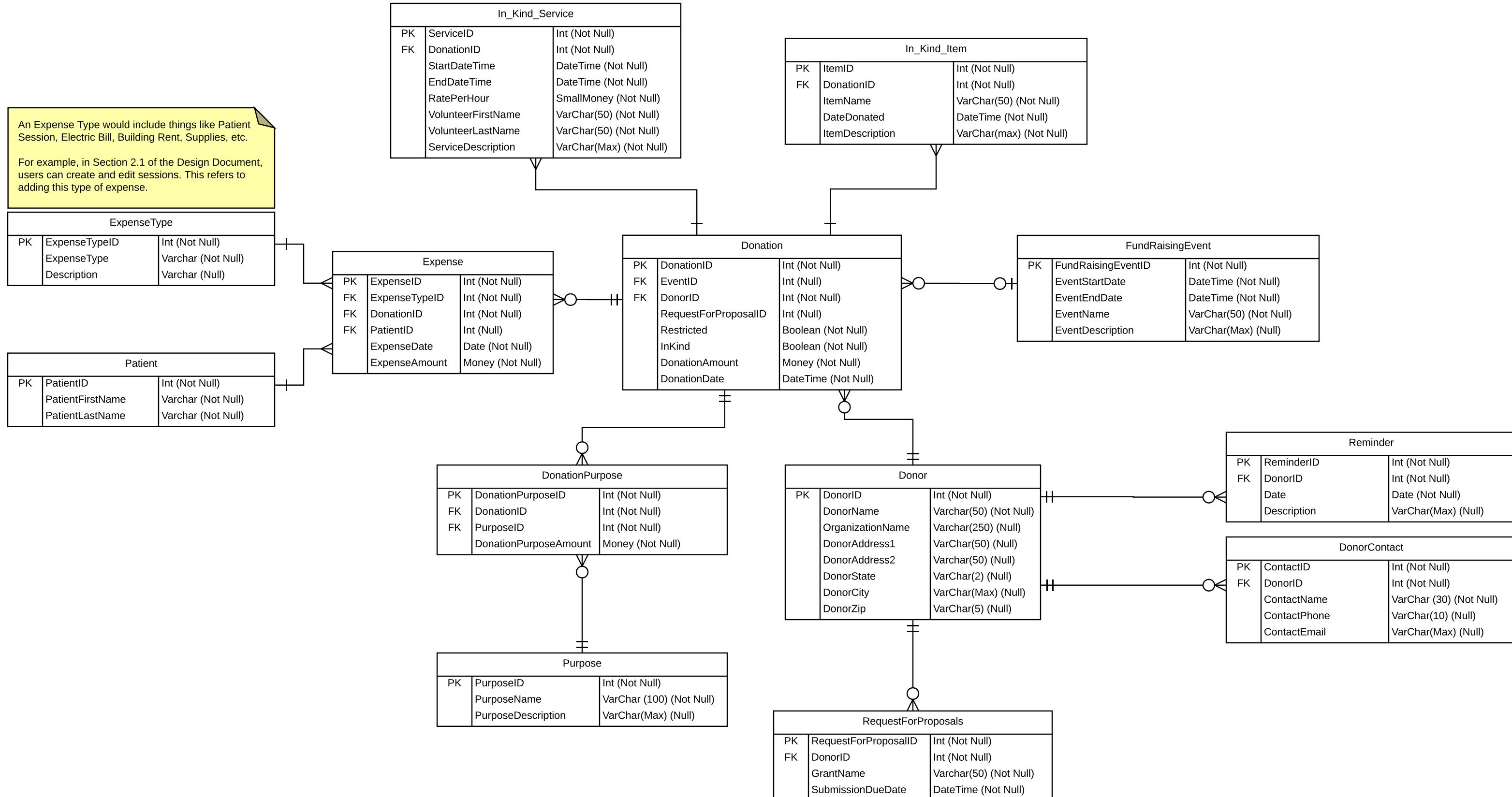
		donated	
ItemID	Int (Not Null)	Numeric value identifying each item donated	In_Kind_Item
ItemName	varchar(50) (Not Null)	Name of item donated	In_Kind_Item
ItemValue	SmallMoney (Not Null)	Monetary value of item donated	In_Kind_Item
OrganizationName	varchar(250) (Null)	An organization that gives a donation	Donor
PatientFirstName	varchar (Not Null)	First name of a patient receiving treatment	Patient
PatientID	Int (Not Null)	A number given to represent a patient as their ID number, which is referenced by the client as PatientOQ and will be entered manually.	Patient
PatientLastName	varchar (Not Null)	Last name of a patient receiving treatment	Patient
PurposeDescription	varchar(max) (Null)	A purpose is a specific FCS program or treatment plan through which a patient receives treatment. The PurposeDescription describes each individual plan/program	Purpose
PurposeID	Int (Not Null)		Purpose
PurposeName	varchar(100) (Not Null)	A purpose is a specific FCS program or treatment plan through which a patient receives treatment. The PurposeName is the name given to each individual plan/program	Purpose
RatePerHour	SmallMoney (Not Null)	Hourly monetary value of service provided	In_Kind_Service
ReminderID	Int (Not Null)	Reminders are used to petition donors for additional donations, mostly through the same method of their original donation. For example, reminding a donor of a specific fund raising event at which they donated the previous year.	Reminder
Restricted	Boolean (Not Null)	If a donation is restricted is must be used for a specific purpose predetermined by the donor. If it is not	Donation

		restricted a donation may be used for purposes determined by FCS	
ServiceDescription	varchar(max) (Not Null)	Description of services provided by volunteer	In_Kind_Service
ServiceID	Int (Not Null)	Numeric value identifying each act of service	In_Kind_Service
StartDateTime	DateTime (Not NULL)	Starting date and time of service provided	In_Kind_Service
SubmissionDueDate	DateTime (Not NULL)	Each grant proposal must be submitted by a specific date. The submission due date is the date by which the proposal must be submitted.	GrantProposal
VolunteerFirstName	varchar(50) (Not Null)	First name of volunteer offering donation in the form of service	In_Kind_Service
VolunteerLastName	varchar(50) (Not Null)	Last name of volunteer offering donation in the form of service	In_Kind_Service

6.0 Class Diagrams



7.0 Entity Relationship Diagram

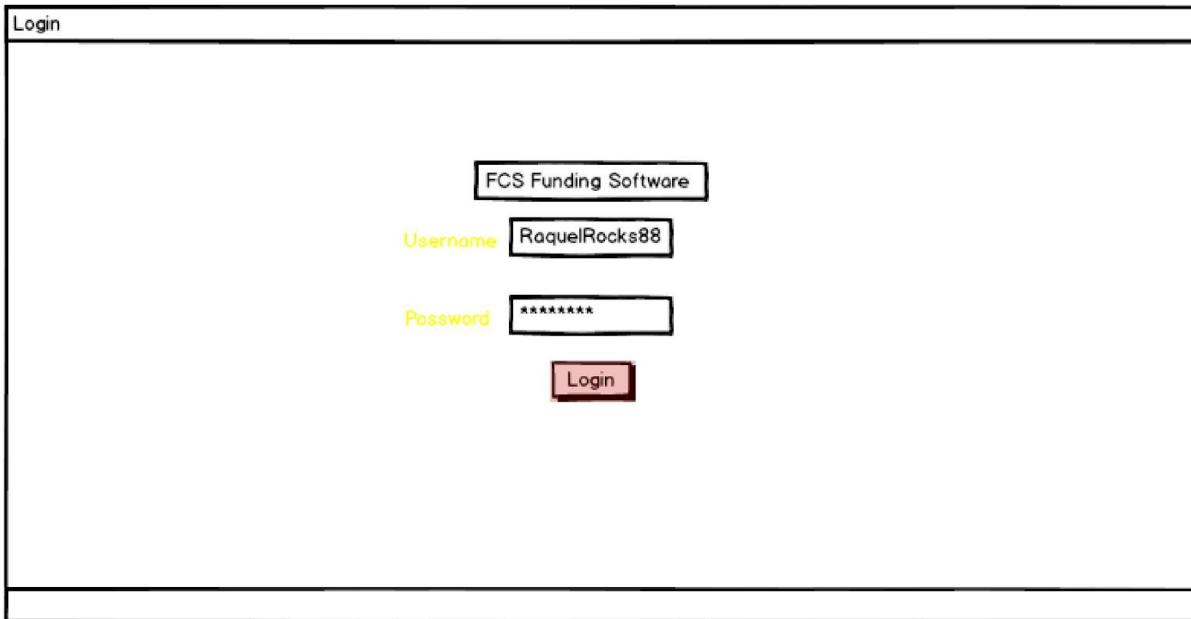


8.0 Prototypes

Screenshots of the prototype are provided in this section. The actual prototype, which was included in the zip folder provided, is setup as an interactive document with links to show navigation and functionality.

Login

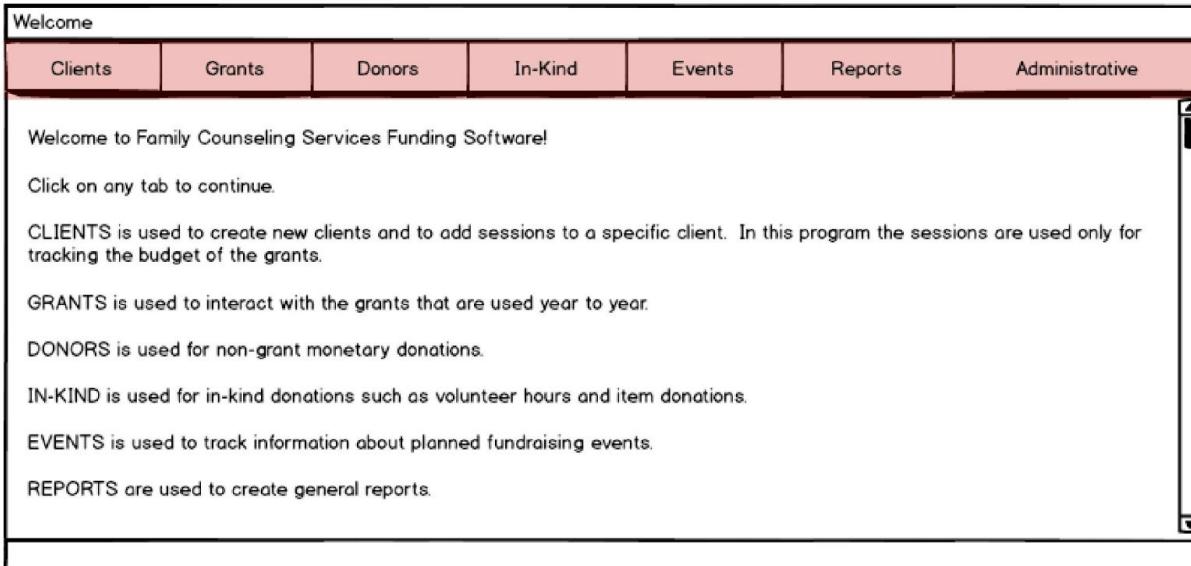
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The login screen features a header bar with the text "Login". Below this is a central area containing the FCS Funding Software logo. To the left of the logo is the text "Username" and to its right is the input field "RaquelRocks88". Below the logo is the text "Password" and to its right is a redacted input field showing "*****". At the bottom center is a red "Login" button.

Front Page

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The front page has a header bar with the text "Welcome". Below this is a navigation bar with tabs: Clients, Grants, Donors, In-Kind, Events, Reports, and Administrative. The "Clients" tab is highlighted in pink. The main content area contains the following text:
Welcome to Family Counseling Services Funding Software!
Click on any tab to continue.
CLIENTS is used to create new clients and to add sessions to a specific client. In this program the sessions are used only for tracking the budget of the grants.
GRANTS is used to interact with the grants that are used year to year.
DONORS is used for non-grant monetary donations.
IN-KIND is used for in-kind donations such as volunteer hours and item donations.
EVENTS is used to track information about planned fundraising events.
REPORTS are used to create general reports.

Clients																											
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																					
Create New Client	<div style="display: flex; justify-content: space-between;"><div style="flex: 1; padding: 5px;">Search by... <input type="text" value="Nathan"/></div><div style="flex: 1; padding: 5px;">Client OQ <input type="text" value="Name"/></div></div>																										
	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>Name</th><th>Client OQ</th><th>Notes</th></tr></thead><tbody><tr><td>BROWN NATHAN</td><td>102456</td><td>Primarily on "R.E and J.E. Bamberger Memorial Grant"</td></tr><tr><td>DOE JOHN</td><td>765234</td><td></td></tr><tr><td>DOE JANE</td><td>109654</td><td></td></tr><tr><td>MEYER FRED</td><td>109764</td><td></td></tr><tr><td>CLAUSE SANTA</td><td>122515</td><td></td></tr><tr><td>BUTTS SEYMOUR</td><td>133790</td><td></td></tr></tbody></table>						Name	Client OQ	Notes	BROWN NATHAN	102456	Primarily on "R.E and J.E. Bamberger Memorial Grant"	DOE JOHN	765234		DOE JANE	109654		MEYER FRED	109764		CLAUSE SANTA	122515		BUTTS SEYMOUR	133790	
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BUTTS SEYMOUR	133790																										

Clients - New Client

Clients						
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Create New Client	<div style="display: flex; justify-content: space-between;"><div style="flex: 1; padding: 5px;">Client Name: <input type="text" value="BROWN NATHAN"/></div><div style="flex: 1; padding: 5px;">Client OQ: <input type="text" value="1337"/></div></div>					
	<div style="margin-top: 20px;"><p>Notes:</p><div style="border: 1px solid black; padding: 10px; min-height: 100px;"><p>Primarily on "R.E and J.E. Bamberger Memorial Grant".</p></div></div>					
	<div style="text-align: center; margin-top: 20px;">ADD CLIENT</div>					

Clients

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																				
Create New Client	Client Name: <input type="text" value="BROWN NATHAN"/>	Client OQ: <input type="text" value="1337"/>																								
	Notes: <input and="" bomberger="" grant\"."="" je.="" memorial="" r.e="" type="text" value="Primarily on \"/>																									
	<input type="button" value="Save Changes"/> <input type="button" value="ADD SESSIONS/CLASSES"/>																									
	<table border="1"> <thead> <tr> <th>Session Date</th> <th>Grant</th> <th>Amount</th> <th>Notes/Copay</th> </tr> </thead> <tbody> <tr> <td>6/18/15</td> <td>R.E and JE. Bomberger Memorial Foundation</td> <td>72.00</td> <td>FROM KING</td> </tr> <tr> <td>6/25/15</td> <td>R.E and JE. Bomberger Memorial Foundation</td> <td>72.00</td> <td></td> </tr> <tr> <td>7/1/15</td> <td>R.E and JE. Bomberger Memorial Foundation</td> <td>72.00</td> <td></td> </tr> <tr> <td>7/15/15</td> <td>R.E and JE. Bomberger Memorial Foundation</td> <td>72.00</td> <td></td> </tr> </tbody> </table>						Session Date	Grant	Amount	Notes/Copay	6/18/15	R.E and JE. Bomberger Memorial Foundation	72.00	FROM KING	6/25/15	R.E and JE. Bomberger Memorial Foundation	72.00		7/1/15	R.E and JE. Bomberger Memorial Foundation	72.00		7/15/15	R.E and JE. Bomberger Memorial Foundation	72.00	
Session Date	Grant	Amount	Notes/Copay																							
6/18/15	R.E and JE. Bomberger Memorial Foundation	72.00	FROM KING																							
6/25/15	R.E and JE. Bomberger Memorial Foundation	72.00																								
7/1/15	R.E and JE. Bomberger Memorial Foundation	72.00																								
7/15/15	R.E and JE. Bomberger Memorial Foundation	72.00																								

Clients

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Client	Client Name: <input type="text" value="BROWN NATHAN"/>	Session Hours: <input type="text" value="1"/>				
	Grant Name: Select Grant... <input type="button" value="▼"/> R.E. and J.E. Bam Beaver Creek Cross Charitable Davis School Dist.	Cost Per Session Hour: <input type="text" value="\$72"/>		Date: <input type="text" value="7/16/15"/> <input type="button" value="▼"/>		
		Session Location: <input type="text" value="FCS Ogden Office"/>				
	Amount Deducted: <input type="text" value="\$72"/>	Co-pay: <input type="text" value="\$15"/>				
	Notes/Copay: <input type="text"/>					
	<input type="button" value="Save Session"/>					

Clients - BROWN NATHAN - UPDATE

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Clients

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Client	Client Name: BROWN NATHAN Session Hours: 1 Grant Name: Select Grant... ▾ R.E. and JE. Bam Beaver Creek Cross Charitable Davis School Dist Cost Per Session Hour: \$72 Date: 7/16/15 Session Location: FCS Ogden Office Amount Deducted: \$72 Co-pay: \$15 Notes/Copay: <input type="button" value="Save Changes"/>					

Grants

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Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant	Search by... ▾ Blue Cross Foundation Grant ID Name Date Range Total Amount Grant Name R.E. and JE. Bamberger Memorial Foundation 110456 11/5/15 Healthy Minds \$5000 Cross Charitable Foundation 123777 11/4/15 Healthy Minds \$4500 Make a Goal Foundation 080123 10/28/15 Healthy Minds \$3000 Robert Downey Sr. 031237 10/25/15 Healthy Minds \$2323 Anonymous 098012 10/24/15 Healthy Minds \$1543					

Add New Grant

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Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant	Grant Name: <input type="text" value="R.E and JE Bamberger Memorial Foundation"/>					
Create Grant Reminder	Amount Received: <input type="text" value="\$3000.00"/>	Balance/Amount Remaining: <input type="text" value="\$0.00"/>				
View Grant Reminder	Purpose/Program: <input type="text" value="Healthy Minds"/>	Date Received: <input type="text" value="11/5/15"/> <input type="button" value="Calendar"/>				
	<input type="button" value="Save Grant"/>					

Grants - Create Grant Reminder

10 / 60

Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant	Grant Name: <input type="text" value="Hill AFB Thrift Store"/>					
Create Grant Reminder	Ongoing or New: <input type="button" value="Ongoing"/> <input type="button" value="New"/>	Pending/Yes/No: <input type="button" value="Pending"/> <input type="button" value="Yes"/> <input type="button" value="No"/>				
View Grant Reminder	Date Applied: <input type="text" value="9/28/15"/> <input type="button" value="Calendar"/>	Date Received: <input style="width: 20px" type="text" value="/"/> <input type="button" value="Calendar"/>				
	Amount Requested: <input type="text" value="\$2000"/>	Amount Received: <input type="text" value="\$500"/>				
	Difference: <input type="text"/>	Purpose: <input type="text" value="Healing Lives /General"/>				
	<input type="button" value="Create Grant Reminder"/>					

Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																																								
Add New Grant Create Grant Reminder View Grant Reminder	<input type="text" value="Search by.."/> <input type="button" value="▼"/> <input type="text" value="Grant Name"/> <input type="text" value="Date To Apply By"/> <input type="text" value="St. Benedict's Fdn"/> <input type="text" value="Amount Requested"/>	<input type="text" value="Blue Cross Foundation"/> <table border="1"> <thead> <tr> <th>Ongoing/New</th> <th>Y/N/Pend</th> <th>Applied</th> <th>Received</th> <th>\$ Requested</th> </tr> </thead> <tbody> <tr> <td>O</td> <td>Y</td> <td>1/12/15</td> <td>2/12/15</td> <td>\$180204.23</td> </tr> <tr> <td>O</td> <td>P</td> <td>9/28/15</td> <td>\$2000</td> <td>\$500</td> </tr> <tr> <td>O</td> <td>Y</td> <td>1/14/15</td> <td>3/18/15</td> <td>\$30000.00</td> </tr> <tr> <td>O</td> <td>Y</td> <td>2/4/15</td> <td>2/4/15</td> <td>\$18000.00</td> </tr> <tr> <td>N</td> <td>P</td> <td>2/25/15</td> <td></td> <td>\$5000.00</td> </tr> <tr> <td>N</td> <td>N</td> <td>2/25/15</td> <td></td> <td>\$30000.00</td> </tr> <tr> <td>N</td> <td>Y</td> <td>3/1/15</td> <td>9/4/15</td> <td>\$600.00</td> </tr> </tbody> </table>					Ongoing/New	Y/N/Pend	Applied	Received	\$ Requested	O	Y	1/12/15	2/12/15	\$180204.23	O	P	9/28/15	\$2000	\$500	O	Y	1/14/15	3/18/15	\$30000.00	O	Y	2/4/15	2/4/15	\$18000.00	N	P	2/25/15		\$5000.00	N	N	2/25/15		\$30000.00	N	Y	3/1/15	9/4/15	\$600.00
Ongoing/New	Y/N/Pend	Applied	Received	\$ Requested																																										
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Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant Create Grant Reminder View Grant Reminder	<p>Grant Name: <input type="text" value="Hill AFB Thrift Store"/></p> <p>Ongoing or New: <input type="button" value="Ongoing"/> <input type="button" value="New"/> Pending/Yes/No: <input type="button" value="Pending"/> <input type="button" value="Yes"/> <input type="button" value="No"/></p> <p>Application Date: <input type="text" value="9/31/15"/> <input type="button" value="Calendar"/></p> <p>Date Applied: <input type="text" value="9/28/15"/> <input type="button" value="Calendar"/> Date Received: <input type="text" value=" "/> <input type="button" value="Calendar"/></p> <p>Amount Requested: <input type="text" value="\$2000"/> Amount Received: <input type="text" value="\$500"/></p> <p>Difference: <input type="text"/></p> <p>Purpose: <input type="text" value="Healing Lives /General"/></p> <p><input type="button" value="Save Updates"/></p>					

Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																								
Add New Grant	Grant Name: <input type="text" value="R.E and J.E Bamberger Memorial Foundation"/>																													
Create Grant Reminder	Amount Received: <input type="text" value="\$3000.00"/>	Balance/Amount Remaining: <input type="text" value="\$0.00"/>																												
View Grant Reminder	Purpose/Program: <input type="text" value="Healthy Minds"/>	Date Received: <input type="text" value="11/15/15"/> <input type="button" value="Calendar"/>																												
	<input type="button" value="Save Changes"/> <input type="button" value="ADD SESSIONS/CLASSES"/>																													
	<table border="1"> <thead> <tr> <th>Client Name</th> <th>Sessions</th> <th>Amount</th> <th>Date</th> <th>Balance</th> <th>Notes/Copay</th> </tr> </thead> <tbody> <tr> <td>BROWN NATHAN</td> <td></td> <td>105.78</td> <td>5/7/15</td> <td>2894.22</td> <td>FROM KING</td> </tr> <tr> <td>BROWN NATHAN</td> <td></td> <td>\$552.00</td> <td>5/21/15</td> <td>2342.22</td> <td></td> </tr> <tr> <td>BROWN NATHAN</td> <td></td> <td>\$615.00</td> <td>6/4/15</td> <td>1727.22</td> <td></td> </tr> </tbody> </table>						Client Name	Sessions	Amount	Date	Balance	Notes/Copay	BROWN NATHAN		105.78	5/7/15	2894.22	FROM KING	BROWN NATHAN		\$552.00	5/21/15	2342.22		BROWN NATHAN		\$615.00	6/4/15	1727.22	
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Grant - R.E and J.E Bamberger Memorial Foundation -ADD SESSION

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Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant	Grant Name: <input type="text" value="R.E and J.E Bamberger Memorial Foundation"/>					
Create Grant Reminder	Amount Received: <input type="text" value="\$3000.00"/> Balance/Amount Remaining: <input type="text" value="\$105.78"/> Date: <input type="text" value="9/2/15"/>					
View Grant Reminder	Client Name: <input type="text" value="BROWN NATHAN"/>	Sessions: <input type="text" value="3"/>				
	Amount: <input type="text" value="105.78"/>	Date: <input type="text" value="7/16/15"/> <input type="button" value="Calendar"/>				
	Co-pay: <input type="text" value="\$15"/>	Client OQ: <input type="text" value="110456"/>				
	Notes/Copay: <input type="text" value="FROM KING"/>					
	<input type="button" value="SAVE SESSION/CLASS"/>					

Grants

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add New Grant	Grant Name: R.E and J.E Bamberger Memorial Foundation Amount Received: \$3000.00 Balance/Amount Remaining: \$105.78 Date: 9/2/15 Client Name: BROWN NATHAN Sessions: 3 Amount: 105.78 Date: 7/16/15 Co-pay: \$15 Client OQ: 110456 Notes/Copay: FROM KING <input type="button" value="SAVE CHANGES"/>					

Donors

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Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																								
Create New Donor	Search by... ▾ <input type="text" value="Robert D"/> <table border="1"> <tr> <td>Donor ID</td> <td>Donor Name</td> <td>Donation Date</td> <td>Total Donation</td> </tr> <tr> <td>110456</td> <td>Robert Doe</td> <td>11/5/15</td> <td>\$200</td> </tr> <tr> <td>080123</td> <td>Jack Hill</td> <td>10/28/15</td> <td>\$150</td> </tr> <tr> <td>031237</td> <td>Jill Hill.</td> <td>10/25/15</td> <td>\$125</td> </tr> <tr> <td>098012</td> <td>Anonymous</td> <td>10/24/15</td> <td>\$40</td> </tr> <tr> <td>154678</td> <td>Mothers Against Drunk Dribbling</td> <td>10/15/15</td> <td>\$20</td> </tr> </table>						Donor ID	Donor Name	Donation Date	Total Donation	110456	Robert Doe	11/5/15	\$200	080123	Jack Hill	10/28/15	\$150	031237	Jill Hill.	10/25/15	\$125	098012	Anonymous	10/24/15	\$40	154678	Mothers Against Drunk Dribbling	10/15/15	\$20
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154678	Mothers Against Drunk Dribbling	10/15/15	\$20																											

Create New Donor

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Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Create New Donor		<p>Donor Name: <input type="text" value="Robert Doe"/></p> <p>Phone: <input type="text" value="801-777-1225"/></p> <p>Email: <input type="text" value="myEmail@gmail.com"/></p> <p>Street Address: <input type="text" value="222 East Main Street"/></p> <p>City: <input type="text" value="Springfield"/></p> <p>State: <input type="text" value="Ut"/></p> <p>Zipcode: <input type="text" value="97123"/></p> <p>Notes: <input type="text" value="Loves to help the Hispanics in the area and said he wants to make an impact."/></p> <p><input type="button" value="Save Donor"/></p>				

Donors - Robert Doe - Donor Information

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Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Create New Donor		<p>Donor Information <input checked="" type="button" value="Donations"/></p> <p>Donor Name: <input type="text" value="Robert Doe"/></p> <p>Phone: <input type="text" value="801-777-1225"/></p> <p>Email: <input type="text" value="myEmail@gmail.com"/></p> <p>Street Address: <input type="text" value="222 East Main Street"/></p> <p>City: <input type="text" value="Springfield"/></p> <p>State: <input type="text" value="Ut"/></p> <p>Zipcode: <input type="text" value="97123"/></p> <p>Notes: <input type="text" value="Loves to help the Hispanics in the area and said he wants to make an impact."/></p> <p><input type="button" value="Save Changes"/></p>				

Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																											
		Donor Information	Donations																														
Create New Donor																																	
ADD DONATION																																	
<table border="1"> <thead> <tr> <th>Donation</th> <th>Purpose</th> <th>Date of Donation</th> </tr> </thead> <tbody> <tr> <td>\$40</td> <td>Help Hispanic Family</td> <td>3/7/16</td> </tr> <tr> <td>\$20</td> <td>None</td> <td>3/2/16</td> </tr> <tr> <td>\$45</td> <td>None</td> <td>3/1/16</td> </tr> <tr> <td>\$22</td> <td>None</td> <td>12/20/15</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>							Donation	Purpose	Date of Donation	\$40	Help Hispanic Family	3/7/16	\$20	None	3/2/16	\$45	None	3/1/16	\$22	None	12/20/15												
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\$45	None	3/1/16																															
\$22	None	12/20/15																															

Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
		Donor Information	Donations			
Create New Donor						
Donation Amount: <input type="text" value="\$40"/> Purpose: <input type="text" value="Help Hispanic Family"/> Date of Donation: <input type="text" value="10/11/15"/> <input type="button" value="Calendar"/> Notes: <input type="text"/> Save Donation						

Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
<div style="display: flex; justify-content: space-between;"> Donor Information Donations </div> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <p>Create New Donor</p> </div> <div style="flex: 1; padding: 10px;"> <p>Donation Amount: <input type="text" value="\$40"/></p> <p>Date of Donation: <input type="text" value="10/11/15"/> <input type="button" value="Calendar"/></p> <p>Notes:</p> <div style="border: 1px solid black; height: 100px; margin-top: 10px;"></div> </div> <div style="flex: 1; text-align: right;"> <p>Purpose: <input type="text" value="Help Hispanic Family"/></p> <p><input type="button" value="Save Changes"/></p> </div> </div>						

In-Kind

22 / 60

In-Kind

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																																																	
<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p>Add In-Kind Donation</p> </div> <div style="flex: 1; text-align: center;"> <p>Search by... <input type="button" value="▼"/></p> <p><input type="text" value="Robert D"/></p> <p><input type="checkbox"/> Items <input type="checkbox"/> Organization</p> </div> </div> <div style="margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Items</th> <th>Organization</th> <th>Date Received</th> <th>Volunteer Hours</th> <th>Rate</th> <th>Value (= hours * rate)</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Software</td> <td>Microsoft</td> <td>1/1/2015</td> <td>-</td> <td>-</td> <td>4000</td> <td>Software Donation</td> </tr> <tr> <td>Nick Williams</td> <td>United Way</td> <td>2/1/2015</td> <td>25</td> <td>10</td> <td>250</td> <td></td> </tr> <tr> <td>John Doe</td> <td>-</td> <td>3/1/2015</td> <td>20</td> <td>10</td> <td>200</td> <td></td> </tr> <tr> <td>John Doe</td> <td>-</td> <td>3/1/2015</td> <td>-</td> <td>-</td> <td>100</td> <td>sofa</td> </tr> <tr> <td>Nick Williams</td> <td>United Way</td> <td>4/1/2015</td> <td>25</td> <td>10</td> <td>250</td> <td></td> </tr> <tr> <td>Nick Williams</td> <td>United Way</td> <td>5/1/2015</td> <td>25</td> <td>10</td> <td>250</td> <td></td> </tr> </tbody> </table> </div>							Items	Organization	Date Received	Volunteer Hours	Rate	Value (= hours * rate)	Description	Software	Microsoft	1/1/2015	-	-	4000	Software Donation	Nick Williams	United Way	2/1/2015	25	10	250		John Doe	-	3/1/2015	20	10	200		John Doe	-	3/1/2015	-	-	100	sofa	Nick Williams	United Way	4/1/2015	25	10	250		Nick Williams	United Way	5/1/2015	25	10	250	
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In-Kind - Add Donation

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Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add In-Kind Donation			<p>Items or Volunteer Name: <input type="text" value="John Doe"/></p> <p>Organization Name: <input type="text"/></p> <p>Volunteer Hours: <input type="text" value="20"/> Date of Donation: <input type="text" value="3/1/15"/> <input type="button" value="Calendar"/></p> <p>Rate Per Hour: <input type="text" value="10"/> Total Value: <input type="text" value="200"/></p> <p>Description: <input type="text"/></p> <p><input type="button" value="Save In-Kind Donation"/></p>			

In-Kind - Update Donation

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Donors

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Add In-Kind Donation			<p>Items or Volunteer Name: <input type="text" value="John Doe"/></p> <p>Organization Name: <input type="text"/></p> <p>Volunteer Hours: <input type="text" value="20"/> Date of Donation: <input type="text" value="3/1/15"/> <input type="button" value="Calendar"/></p> <p>Rate Per Hour: <input type="text" value="10"/> Total Value: <input type="text" value="200"/></p> <p>Description: <input type="text"/></p> <p><input type="button" value="Save Changes"/></p>			

Events							
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative	
Create New Event				Search by... ▾	Mental Health Awareness Event		
				Event ID Event Name Event Date			
Event Name		Event ID	Event Date	Total \$ Raised			
New Years Fundraiser		111778	1/2/16	\$0.00			
Mental Health Awareness Event		111777	12/10/15	\$125			
Thanksgiving Gratitude Event		110456	11/5/15	\$2018			
Make a Goal Foundation Presentation		080123	10/28/15	\$1337			
Robert Downey Sr. Visit		031237	10/25/15	\$5000			
Halloween Madness		098012	10/24/15	\$2000			

Events - Create New Event

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Events								
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative		
Create New Event		Event Name: <input type="text" value="Mental Health Awareness Event"/>		Event Date: <input type="text" value="12/10/15"/> 				
		Event Description: <div style="border: 1px solid black; padding: 5px;">A presentation at Weber State University in the Shepherd Union Building. We will have a presentation about the harm of mental illness on society and then allow the people attending to make a donation at the end of the presentation.</div>						
		Comments/Notes: <div style="border: 1px solid black; padding: 5px;">The presentation will start at 1 PM.</div>						
<input type="button" value="Save Event"/>								

Events

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative		
				Event Information	Donations	Mailing List	Email List	Phone List
Create New Event				Event Name: <input type="text" value="Mental Health Awareness Event"/>	Event Date: <input type="text" value="12/10/15"/> 			
				Event Description: A presentation at Weber State University in the Shepherd Union Building. We will have a presentation about the harm of mental illness on society and then allow the people attending to make a donation at the end of the presentation.				
				Comments/Notes: The presentation will start at 1 PM.				
								Save Changes

Events

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																
				Event Information	Donations	Mailing List	Email List	Phone List														
Create New Event					ADD DONATION																	
				<table border="1"> <thead> <tr> <th>Donor Name</th> <th>Donation Amount</th> </tr> </thead> <tbody> <tr> <td>Josh Hilton</td> <td>\$50</td> </tr> <tr> <td>Juan Gonzalez</td> <td>\$20</td> </tr> <tr> <td>Morgan Freeman</td> <td>\$500</td> </tr> <tr> <td>Anonymous</td> <td>\$20</td> </tr> <tr> <td>Seymour Butts</td> <td>\$40</td> </tr> <tr> <td>Julia Sorensen</td> <td>\$90</td> </tr> </tbody> </table>	Donor Name	Donation Amount	Josh Hilton	\$50	Juan Gonzalez	\$20	Morgan Freeman	\$500	Anonymous	\$20	Seymour Butts	\$40	Julia Sorensen	\$90				
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Events

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Events

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative																										
				Event Information	Donations	Mailing List	Email List	Phone List																								
Create New Event	<table border="1"> <tr> <td>Donor Name:</td> <td>Josh Hilton</td> <td>Donation Amount:</td> <td>\$20</td> </tr> <tr> <td>Phone:</td> <td>801-777-7777</td> <td>Email:</td> <td>randomEmail@gmail.com</td> </tr> <tr> <td>Street Address:</td> <td>100 East Main Street</td> <td>City:</td> <td>Ogden</td> </tr> <tr> <td>State:</td> <td>Ut</td> <td>Zipcode:</td> <td>84201</td> </tr> <tr> <td>Notes:</td> <td colspan="3">Loves to help the Hispanics in the area and said he wants to make an impact.</td> </tr> <tr> <td colspan="4" style="text-align: center;">Save Changes</td> </tr> </table>								Donor Name:	Josh Hilton	Donation Amount:	\$20	Phone:	801-777-7777	Email:	randomEmail@gmail.com	Street Address:	100 East Main Street	City:	Ogden	State:	Ut	Zipcode:	84201	Notes:	Loves to help the Hispanics in the area and said he wants to make an impact.			Save Changes			
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Notes:	Loves to help the Hispanics in the area and said he wants to make an impact.																															
Save Changes																																

Events - MHAE - Mailing List

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Events						
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
				Event Information	Donations	Mailing List
Create New Event						
	Donor Name	Street Address	City	State	Zipcode	
	Josh Hilton	100 East Main St.	Ogden	Ut	84201	
	Juan Gonzalez	200 Center St.	Ogden	Ut	84201	
	Morgan Freeman	755 Hollywood St.	Salt Lake City	Ut	84101	
	Anonymous					
	Seymour Butts	2000 South 600 East	Bountiful	Ut	84010	
	Julia Sorensen	1030 North Onion St	North Salt Lake	Ut	84010	

Events - MHAE - Email List

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Events						
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
				Event Information	Donations	Mailing List
Create New Event				Email List	Phone List	
	Donor Name	Email				
	Josh Hilton	randomEmail@gmail.com				
	Juan Gonzalez	speedyGonzalez88MPH@hotmail.com				
	Morgan Freeman	DivineBeastMode@gmail.com				
	Anonymous					
	Seymour Butts	DontSayMyNameOutLoud@yahoo.com				
	Julia Sorensen	NotSorrySorensen@gmail.com				

Events																			
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative													
				Event Information	Donations	Mailing List													
Create New Event																			
						Phone List													
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Donor Name	Phone																		
Josh Hilton	801-777-7777																		
Juan Gonzalez	801-123-7774																		
Morgan Freeman	801-767-9999																		
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Julia Sorensen	801-345-0986																		

Reports

Reports						
Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
<p>Welcome to Reports!</p> <p>Client Revenue allows you to see how much each client has paid for month over month.</p> <p>Client YTD allows you to see revenue from client co-pays as a year to date report.</p> <p>Donations lets you see all donations in a certain time period.</p> <p>In-Kind Donations displays the report for the in-kind donations for a specific period of time that you select.</p> <p>Grant Donations Month Over Month displays the report for the grant balances from month to month.</p> <p>Grant Fiscal Year allows you to see information about existing and pending grants.</p> <p>Accounting Sheet allows you to display the report for the a specific grant's balance and the various appointments that have drawn funds from a specific grant.</p>						

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
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Client Revenue Month Over Month Report

Start Date:
 End Date:

Order by...

 Highest Amount first

 Lowest Amount first

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Client Revenue Month Over Month Report

1/1/15 - 2/15/15

Client Name	Client OQ	Jan 2015 Co-pay	Feb 2015 Co-pay	Total Co-pay
BROWN NATHAN	102456	\$60	\$72	\$132
DOE JOHN	765234		\$60	\$60
DOE JANE	109654	\$80	\$30	\$110

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
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Client Revenue Month Over Month Report

Printing...

Your report is now done printing.

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
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Client Year to Date

Start Date: End Date:

Generate Report

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Client YTD

1/1/14 - 12/1/15
YTD Total Revenue from Clients: \$302

Client Name	Client OQ	Total Co-pay
BROWN NATHAN	102456	\$132
DOE JOHN	765234	\$60
DOE JANE	109654	\$110

Print Report

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Client YTD

1/1/14 - 12/1/15

YTD Total Revenue from Clients: \$302

Client Name: BROWN
DOE JO
DOE JA

Printing...
Your report is now done printing.

Done

Print Report

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Donations Report

Start Date: 1/1/15 End Date: 2/15/15

Generate Report

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue						
Client YTD						
Donations						
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet						

Donations Report

1/1/15 - 2/15/15

Donor Name	Donor ID	Date Received	Donation Amount	Purpose	Event
Robert Doe	110456	2/5/15	\$200	Healthy Minds	
Jack Hill	080123	1/28/15	\$150		Thanksgiving Event

Total Value: \$350

[Print Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue						
Client YTD						
Donations						
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet						

Donations Report

Donor Name	Donor ID	Purpose	Event
Robert Doe	110456	Healthy Minds	
Jack Hill	080123		Thanksgiving Event

Printing...

Your report is now done printing.

Done

[Print Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

In-Kind Donations Report

Start Date: End Date:

- [Client Revenue](#)
- [Client YTD](#)
- [Donations](#)
- [In-Kind Donations](#)
- [Grant Donations](#)
- [Grant Fiscal Year](#)
- [Accounting Sheet](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

In-Kind Donations Report

1/1/15 - 2/15/15

Items	Organization	Date	Volunteer Hours	Rate	Value (=hours * rate)	Description
Software	Microsoft	1/1/2015	-	-	4000	Software Donation
Nick Williams	United Way	2/1/2015	25	10	250	

Total Value: 4250

- [Client Revenue](#)
- [Client YTD](#)
- [Donations](#)
- [In-Kind Donations](#)
- [Grant Donations](#)
- [Grant Fiscal Year](#)
- [Accounting Sheet](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
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In-Kind Donations Report

Printing...

Your report is now done printing.

Done

[Print Report](#)

Items	Organization	Description
Software	Microsoft	Software Donation
Nick Williams	United Way	

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Grant Donations Month Over Month Report

Start Date: [Calendar](#)

End Date: [Calendar](#)

Order by... [▼](#)

Highest Amount first
Lowest Amount first

[Generate Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Grant Donations Month Over Month Report

Name	Purpose	Open Balance	Jan-2015	Feb-2015	Date Received	Amount	New Grants
EMC Foundation	Healthy Minds	\$5000	\$4500	\$4000	1/2/15	\$4000	
Morgan Freeman Foundation	Healthy Minds	\$5000	\$4500	\$4000	1/2/15	\$4000	
Blue Cross Foundation	Healthy Minds	\$5000	\$4500	\$4000	1/2/15	\$4000	

[Print Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue	Grants	Donors	In-Kind	Events	Reports	Administrative
Client YTD						
Donations						
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet						

Grant Donations Month Over Month Report

Printing...

Your report is now done printing.

Done

[Print Report](#)

015	Feb-2015	Date Received	Amount	New Grants
0	\$4000	1/2/15	\$4000	
0	\$4000	1/2/15	\$4000	
0	\$4000	1/2/15	\$4000	

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue	Grants	Donors	In-Kind	Events	Reports	Administrative
Client YTD						
Donations						
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet						

Grant Fiscal Year

Start Date: End Date:

[Generate Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue	Grants	Donors	In-Kind	Events	Reports	Administrative
Client YTD						
Donations						
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet						

Grant Fiscal Year

1/1/14 - 12/1/15

FY2015 Grant Name	Ongoing / New	Pending / Yes / No	Date Applied	Date Received	Amount Requested	2015 Received Amount	2014 Received Amount	Difference	Purpose
Blue Cross	Ongoing	Yes	12/20/13	1/1/14	\$5000	\$3000	\$2500	\$500	Healthy Minds
EMC Foundation	Ongoing	Pending	12/25/14		\$5000	\$3000		\$3000	Healthy Minds

Total Grant: \$22200 Total In-kind: \$14200 Grant Total: \$36400

[Print Report](#)

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue	<h2>Grant Fiscal Year</h2>					
Client YTD	<p>Printing...</p> <p>Your report is now done printing.</p>					
Donations	FY2015 Grant Name: <input type="text" value="Blue Cross Foundation"/>	Date Applied: <input type="text" value="20/13"/>	Date Received: <input type="text" value="1/1/14"/>	Amount Requested: <input type="text" value="\$5000"/>	2015 Received Amount: <input type="text" value="\$3000"/>	2014 Received Amount: <input type="text" value="\$2500"/>
In-Kind Donations					Difference: <input type="text" value="\$500"/>	Purpose: <input type="text" value="Healthy Minds"/>
Grant Donations						
Grant Fiscal Year	Total Grant: \$22200					
Accounting Sheet						

Grant Total: \$36400

Print Report

Done

Reports - Accounting Sheet

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Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Client Revenue	<h2>Accounting Sheet</h2>					
Client YTD	<p>Grant Name: <input type="text" value="Select..."/></p> <p><input type="text" value="Blue Cross Foundation"/> <input type="text" value="Morgan Freeman Foundation"/> <input type="text" value="R.E and JE Bamberger Mem Cross Charitable Foundation"/></p>					
Donations	Start Date: <input type="text" value="1/1/15"/> <input type="button" value="Calendar"/>	End Date: <input type="text" value="12/31/15"/> <input type="button" value="Calendar"/>				
In-Kind Donations						
Grant Donations						
Grant Fiscal Year						
Accounting Sheet	<input type="button" value="Generate Report"/>					

Reports - Accounting Sheet - Display Report

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Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative												
Client Revenue	<h2>Accounting Sheet</h2>																	
Client YTD	<p>Grant Name: Cross Charitable Foundation Amount: \$8000 Date: 1/1/15 - 12/31/15</p> <table border="1"> <thead> <tr> <th>Patient</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>BROWN NATHAN</td> <td>5/14/15</td> <td>\$578.22</td> </tr> <tr> <td>BROWN NATHAN</td> <td>6/9/15</td> <td>\$468.22</td> </tr> <tr> <td>DOE JOHN</td> <td>6/15/15</td> <td>\$358.22</td> </tr> </tbody> </table>						Patient	Date	Amount	BROWN NATHAN	5/14/15	\$578.22	BROWN NATHAN	6/9/15	\$468.22	DOE JOHN	6/15/15	\$358.22
Patient	Date	Amount																
BROWN NATHAN	5/14/15	\$578.22																
BROWN NATHAN	6/9/15	\$468.22																
DOE JOHN	6/15/15	\$358.22																
Donations																		
In-Kind Donations																		
Grant Donations																		
Grant Fiscal Year																		
Accounting Sheet	<input type="button" value="Print Report"/>																	

Reports

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
---------	--------	--------	---------	--------	---------	----------------

Accounting Sheet

Grant Name: Cross Ch...
Patient
BROWN NATHAN
BROWN NATHAN
DOE JOHN

1/1/15 - 12/31/15
Amount
\$578.22
\$468.22
\$358.22

Printing...
Your report is now
done printing.

Done

Print Report

Administrative

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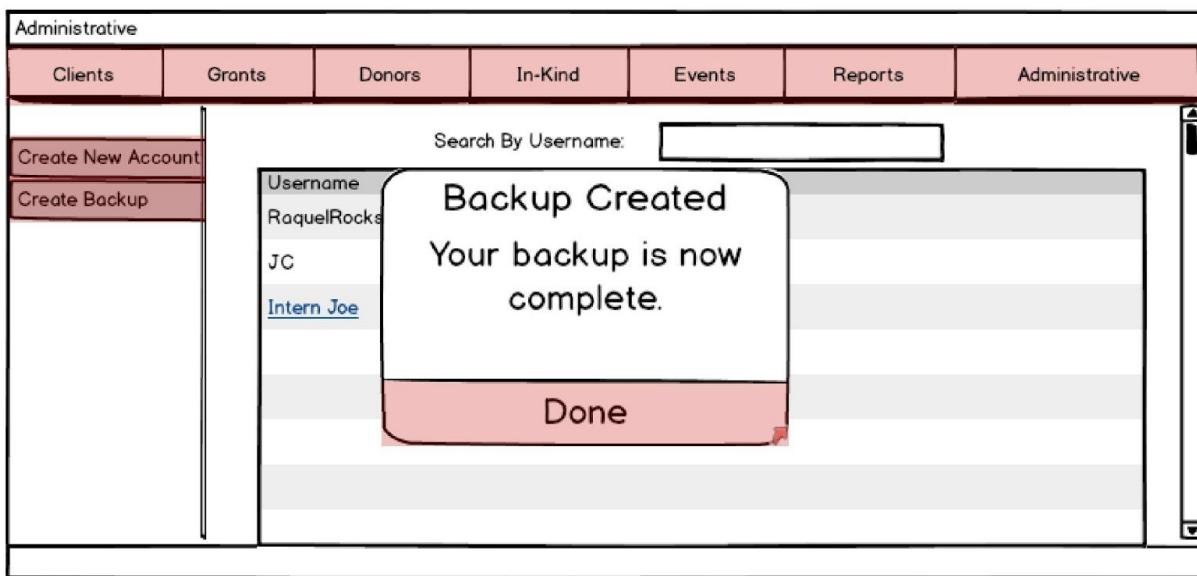
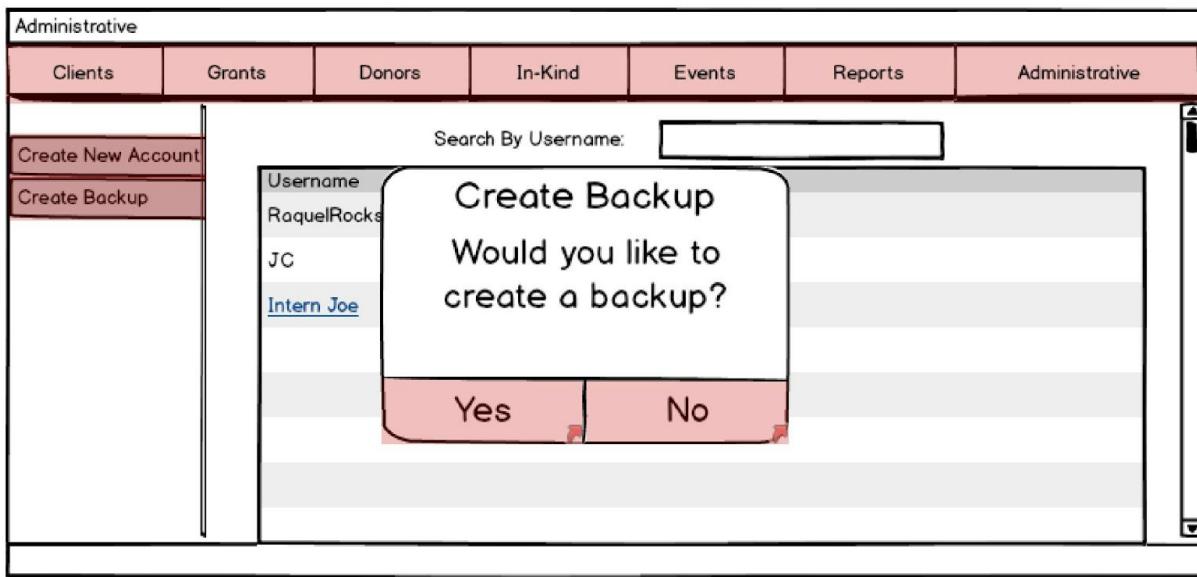
Administrative

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
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Create New Account
Create Backup

Search By Username:

Username
RaquelRocks88
JC
Intern Joe



Administrative

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Create New Account	Username: Intern Joe	Password: *****				
Create Backup	First Name: Joe	Last Name: Dirt				
	Permissions:					
	<input type="checkbox"/> View Clients	<input type="checkbox"/> View Donors				
	<input type="checkbox"/> Create/Alter Client Information	<input type="checkbox"/> Create/Alter Donors				
	<input checked="" type="checkbox"/> View Grants	<input type="checkbox"/> View Events				
	<input checked="" type="checkbox"/> Create/Alter Grant Information	<input type="checkbox"/> Create/Alter Events				
	<input checked="" type="checkbox"/> View Grant Reminder	<input type="checkbox"/> View Non-Sensitive Administrative				
	<input checked="" type="checkbox"/> Create/Alter Grant Reminder	<input type="checkbox"/> Create/Alter Account Info in Administrative				
	Create New Account					

Administrative

Clients	Grants	Donors	In-Kind	Events	Reports	Administrative
Create New Account	Username: Intern Joe	Password: *****				
Create Backup	First Name: Joe	Last Name: Dirt				
	Permissions:					
	<input type="checkbox"/> View Clients	<input type="checkbox"/> View Donors				
	<input type="checkbox"/> Create/Alter Client Information	<input type="checkbox"/> Create/Alter Donors				
	<input checked="" type="checkbox"/> View Grants	<input type="checkbox"/> View Events				
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	<input checked="" type="checkbox"/> Create/Alter Grant Reminder	<input type="checkbox"/> Create/Alter Account Info in Administrative				
	Save Changes					