User Manual

INVENTORY & CRM

Pawsitive Impact

No Kill Louisville

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Introduction

Welcome to the No Kill Louisville Inventory & CRM User Manual. Inside, you'll find a comprehensive, step-by-step walkthrough of every page in our system—each illustrated with clear, full-color screenshots. You'll learn how to log in securely, navigate your schedule, track and adjust inventory levels and volunteer hours, manage volunteer and recipient profiles, receive and manage critical notifications, and fine-tune your account information. Every section shows exactly where to click, what to enter, and how to interpret system feedback, so you can master the application quickly and confidently. Let's get started!

Login Page

Purpose:

Securely authenticate every user before they can access inventory, scheduling, or CRM data. The system verifies credentials against your organization's directory and applies role-based permissions (e.g., Admin, Volunteer), ensuring each person only sees the pages and actions they're allowed.

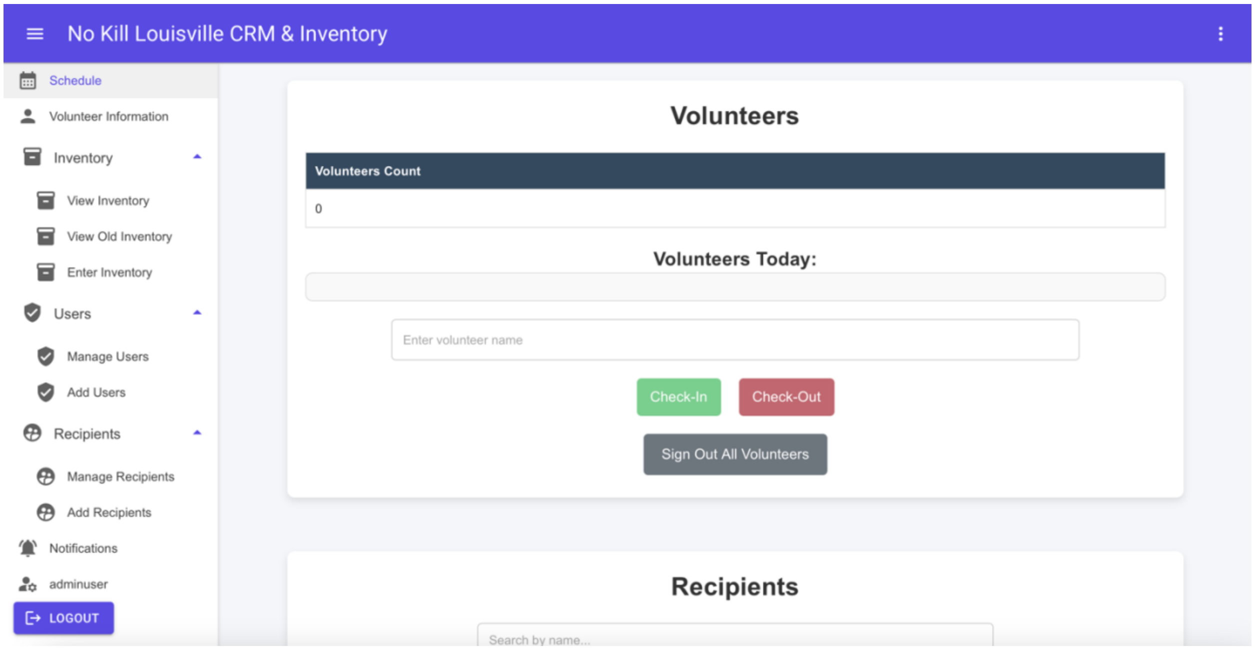
How to use:

1. **Username field:** Enter the username assigned by your administrator. **
2. **Password field:** Type your case-sensitive password.
3. **"Remember Me" toggle:** Click the checkbox to remain logged in on the device.
4. **Sign In button:** Click to sign in. On success, you'll land on the Schedule page.

****New users must speak to the administrator for a new account.**

Schedule Page (Landing Page)

Volunteer Clock-In



Purpose:

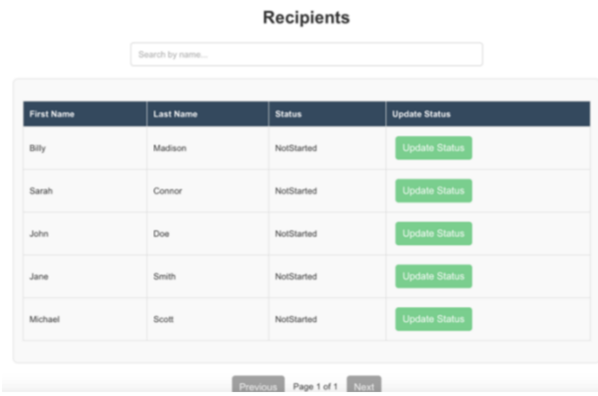
Enable volunteers to self-register their arrival and departure times so that the system can automatically log service hours and produce accurate reports for recognition or audit.

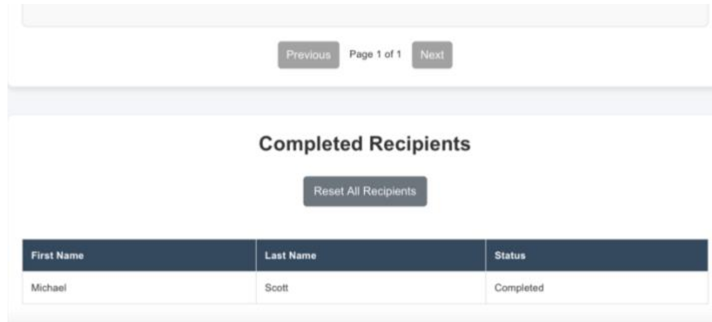
How to use:

1. **Volunteer username entry:** Type in your username when checking in or checking out. **
2. **"Sign In" button:** Click upon arrival; the system records the timestamp and begins tracking your session.
3. **"Sign Out" button:** Click when you leave; the system logs your departure and calculates hours served.

****Usernames must be entered exactly as they have been saved.**

Recipient Progress Status





Purpose:

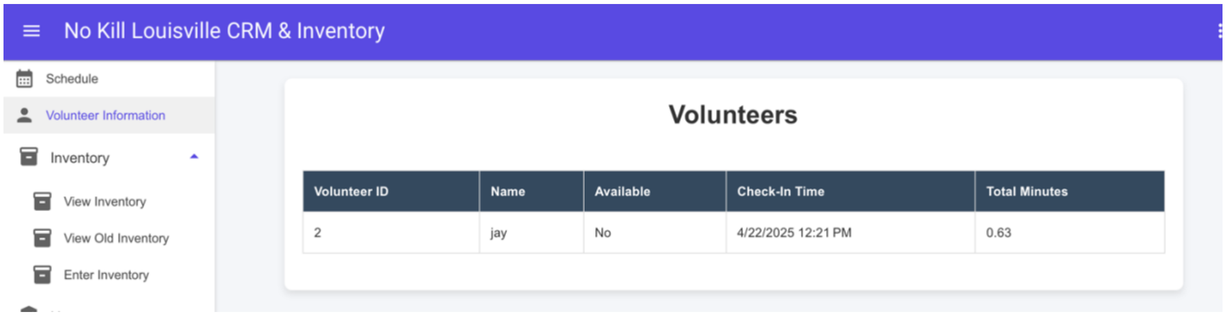
Provide realtime visibility into each recipient's service journey—so coordinators can see who's waiting, who's being helped, and who's completed, ensuring no one falls through the cracks.

How to use:

1. **Recipient list:** Displays all active recipients with columns for First Name, Last Name, Status, and Update Status.
2. **"Update Status" button:** Clicking will update the progress column by **NotStarted**, **InProgress**, **Completed**.
3. **Filter options:** Narrow the list by using the search bar for a specific recipient or specific status. **

****Recipient names must be entered exactly.**

Volunteer Information Page



Purpose:

Give administrators a concise view of who's currently signed in, how long they've been serving, and an easy way to delete any incorrect check-in records—while preventing edits to hours themselves.

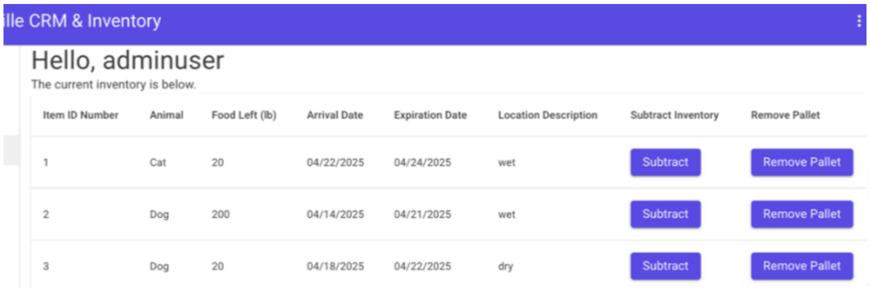
How to use:

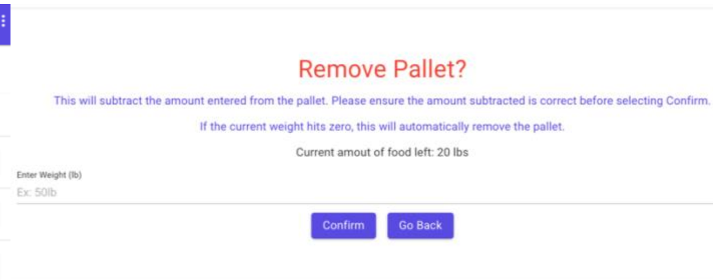
1. **Review the table:**
    a. **Volunteer ID:** System-assigned identifier.
    b. **Name:** Volunteer's username.
    c. **Available:** "Yes" if currently signed in; "No" if signed out.
    d. **Check-In Time:** Timestamp of when they signed in.
    e. **Total Minutes:** Minutes elapsed since check-in (or the session length if signed out).
2. **Remove a record: ****
    a. Click on the volunteer's **Name** in the row you wish to delete.
    b. A **Remove** button will appear.
    c. Click **Remove**, then confirm in the prompt to delete the record.
    d. The table will immediately refresh, and the Total Minutes display will update accordingly.

****Once a record has been removed, it cannot be recovered**

Inventory Pages

View Inventory





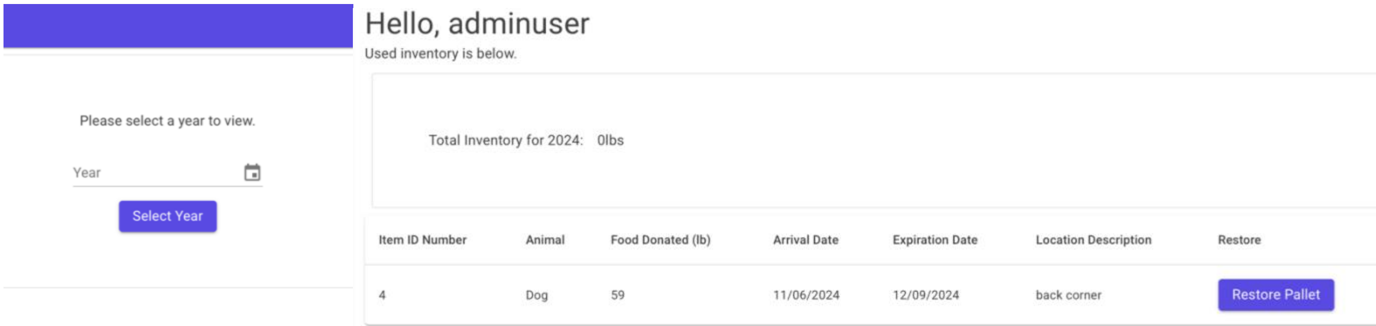
Purpose:

Provide a real-time snapshot of every active inventory item—showing exactly how much is on hand, where it's stored, when it arrived, and when it expires—so you can monitor stock freshness and availability at a glance.

How to use:

1. **Inventory table columns:**
   a. **Item ID Number:** Unique code for the food item.
   b. **Animal:** Choice of **Cat**, **Dog**, or **Other.**
   c. **Food Left:** Amount of food left on the pallet.
   d. **Arrival Date:** When the stock batch was received.
   e. **Expiration Date:** Best-by or use-by date for food safety.
   f. **Location Description:** Custom text to determine where the pallet is stored.
2. **Subtract Partial Quantities:**
   a. Click the **Subtract** button in the row for the item you're removing.
   b. In the text field that appears, enter the number of pounds you're taking out.
   c. Click **Confirm**, and the system will deduct that amount from the current quantity.
3. **Remove Full Pallets:**
   a. Click the **Remove Pallet** button in the item's row to dispose of an entire pallet.

View Old Inventory



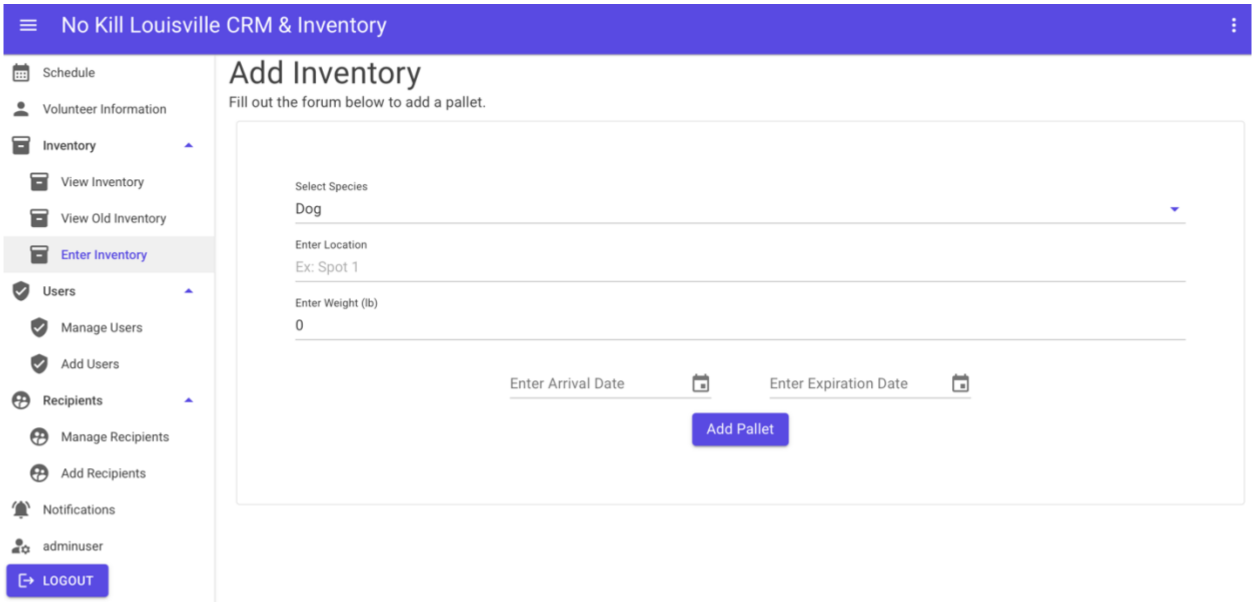
Purpose:

Provide administrators and auditors with full access to all retired or archived inventory batches—preserving key metadata for reporting while enabling selective restoration of old stock.

How to use:

1. **Enter inventory year:**
    a. Enter a year using the calendar field.
    b. Click **Select Year**, and the system will present old inventory from the year.
2. **Inventory table columns:**
    a. **Item ID Number:** Unique code for the food item.
    b. **Animal:** Choice of **Cat**, **Dog**, or **Other.**
    c. **Food Donated:** Amount of food donated.
    d. **Arrival Date:** When the stock batch was received.
    e. **Expiration Date:** Best-by or use-by date for food safety.
    f. **Location Description:** Custom text to determine where the pallet is stored.
3. **Restore to active inventory:**
    a. Click the **Restore Pallet** button in the row for the item you're removing.
    b. In the confirmation message which appears,.
    c. Click **Confirm** in the confirmation message which appears, and the system will restore the pallet to active inventory.

Enter Inventory



Purpose:

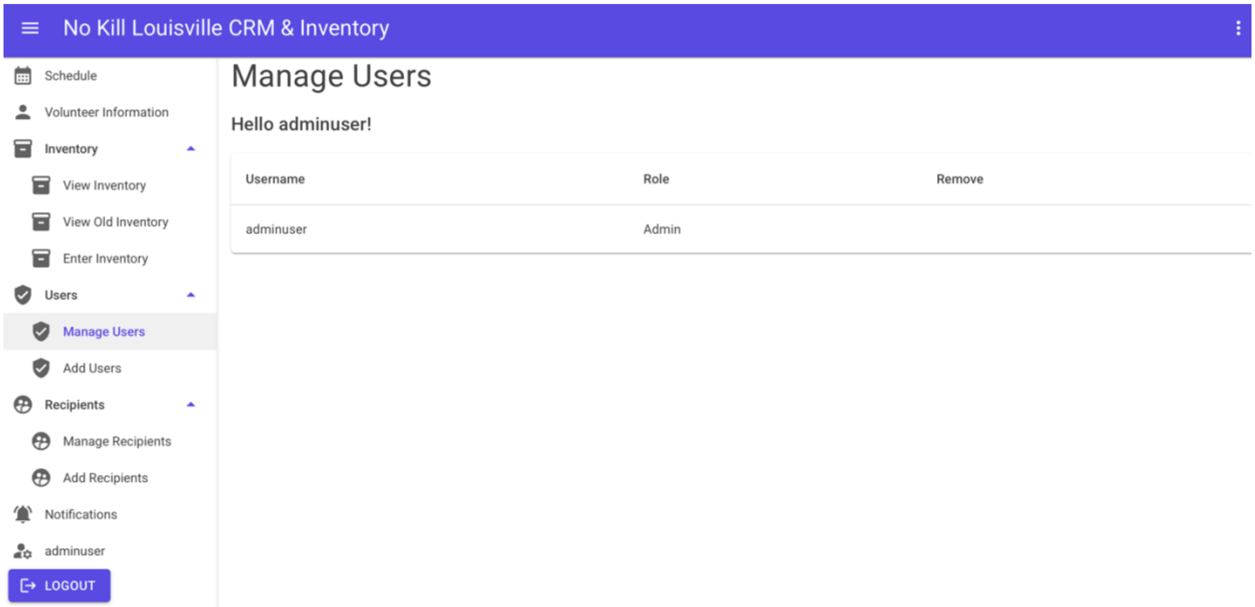
Capture essential details for each incoming pallet of food—categorizing it by animal type, specifying its exact storage spot, and logging weight and key dates—so your active inventory stays current and traceable.

How to use:

1. **Category dropdown:** Select **Dog**, **Cat**, or **Other** to indicate the type of food.
2. **Storage Location field:** Enter free-text describing exactly where this pallet is located.
3. **Weight (lbs) field:** Type the number of pounds received for this pallet.
4. **Arrival Date picker:** Click the calendar icon and choose the date this shipment arrived.
5. **Expiration Date picker:** Click the calendar icon and select the best-by or use-by date for this batch.
6. **Submit / Add Inventory button:** After all fields are filled, click **Add Pallet** to record the pallet. A message will appear asking if you would like to add more, and the new batch will immediately show up in View Inventory.

User Pages

Manage Users



Purpose:

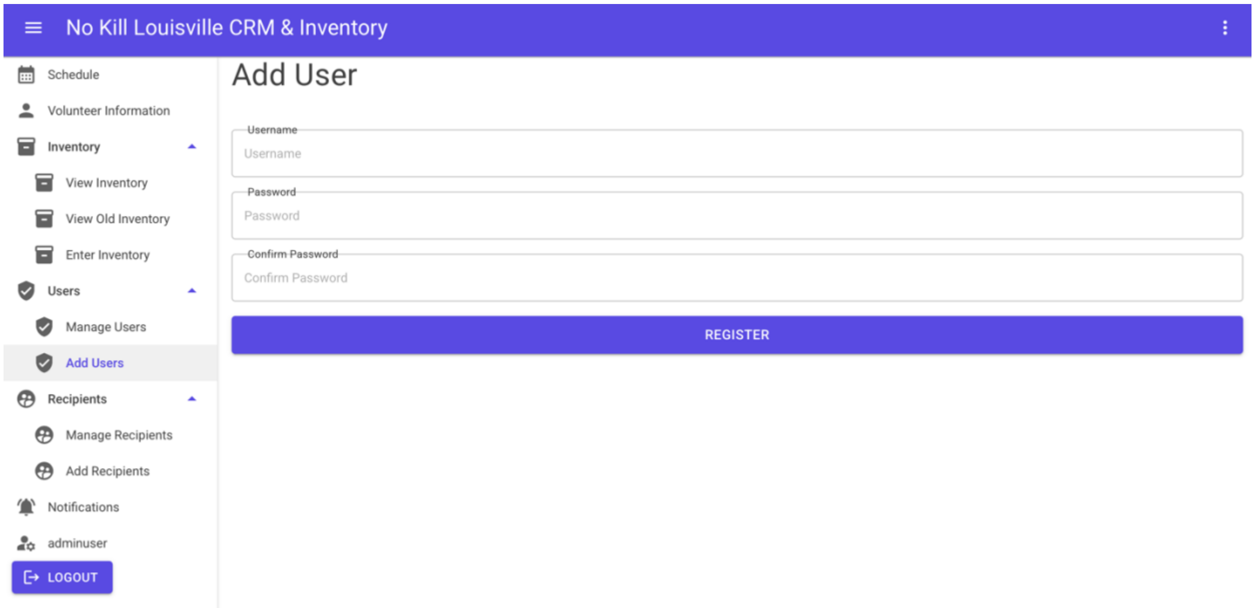
Provide administrators with a live roster of everyone who can access the system—so you can verify new sign-ups, audit active accounts, and remove users who no longer need access.

How to use:

1. **Remove a user:**
    a. Locate the row for the user you wish to delete**.**
    b. Click the **Delete** button at the end of their row.

**** Table may be empty (except admin) until recipients are added on the Add Recipients Page.**

Add Users



Purpose:

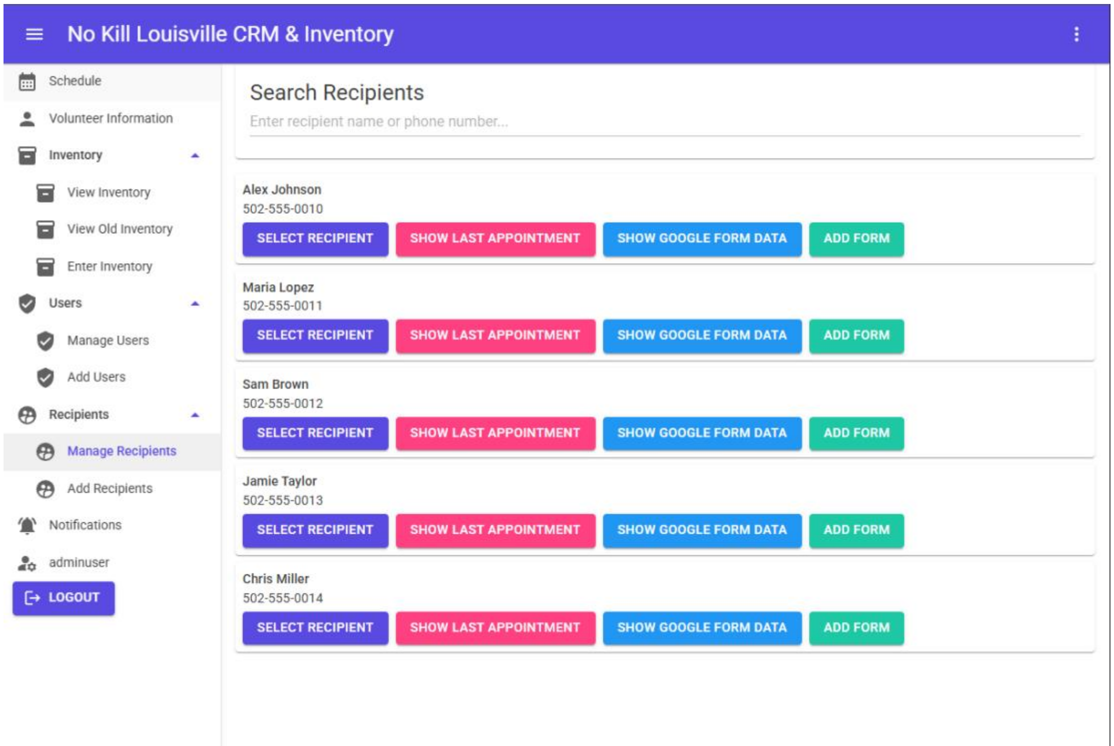
Allow administrators to create new user accounts by setting up login credentials—ensuring each person has a unique username and secure password before they can access the system.

How to use:

1. Enter the desired Username.
2. Type a secure Password that meets complexity requirements.
3. Re-enter the same password in Confirm Password to verify accuracy.
4. Click **Register** to add the new user and click **Confirm** on the page that follows.
5. This immediately lists them on the Manage Users page.

Recipients Pages

Manage Recipients



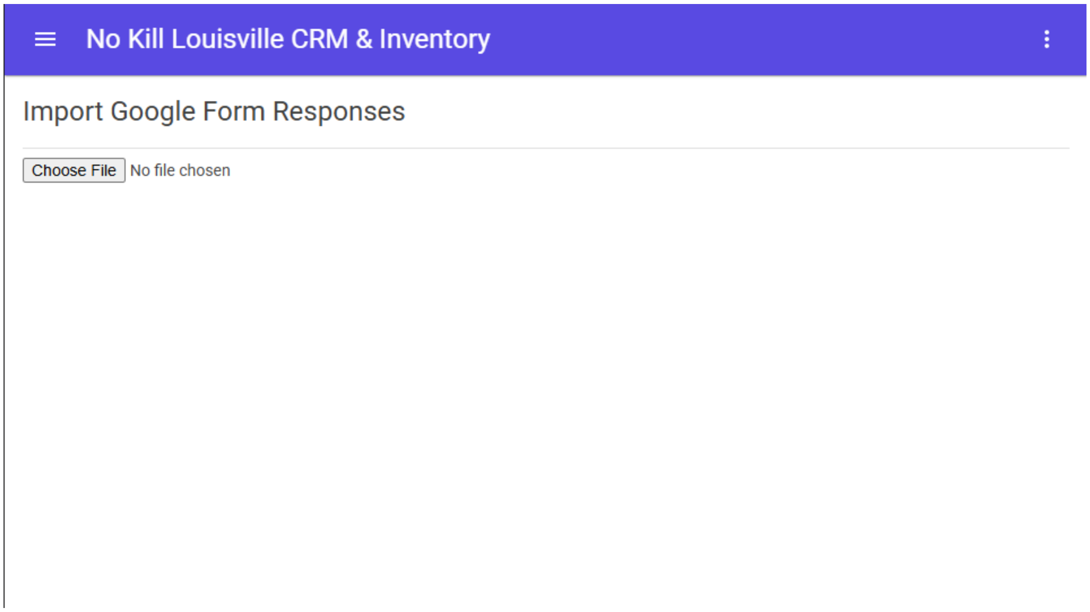
Purpose:

Allows authorized users to search for recipients, update their information, view their form submission history, and add new form entries.

How to use:

1. Click in the search bar underneath "Search Recipients" and search for a recipient based on name or phone number.
2. Once you have found the recipient, you have 4 different button options to click on for managing:
    a. Select Recipient
        i. Selects that recipient and allows you to specify what that recipient will be receiving when they come in for an appointment.
    b. Show Last Appointment
        i. Displays the last appointment date for the recipient.
    c. Show Google Form Data
        i. Shows all data submitted in the Google form application.
    d. Add Form
        i. Expands to allow the administrator to add a form submission for notification tracking.

Add Recipients



Purpose:

Enables the administrator to import a .csv response file from the Google Form data directly into the application database.

How to use:

1. Click on the ‘Choose File’ button.
2. Select the file in your system’s file explorer and click ‘Ok’.
3. The response data is now uploaded to the application database.

Notifications

Expiration Notification Type	Name	Days Until Expiration	Expiration Date
FoodExpiration	Pallet ID: 1	4	04/26/2025
Application	Alex Johnson	0	04/22/2026
ProofOfIncome	Maria Lopez	1	04/23/2026
SpayNeuter	Sam Brown	4	04/26/2026

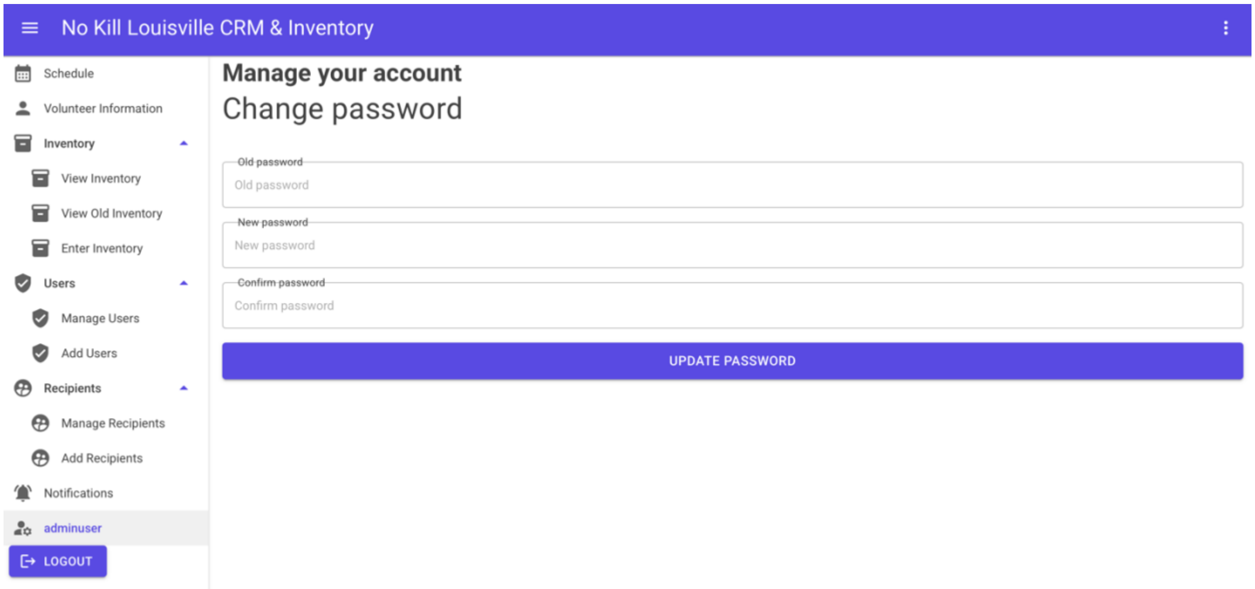
Purpose:

The Notifications tab allows for a user to see what upcoming forms or food inventory is expiring. Provides timely alerts for any inventory pallets or forms that will expire within the next seven days, with a clear countdown of days remaining so you can act before items become unusable or paperwork lapses.

How to use:

1. Navigate to the **Notifications** section from the main menu.
2. Review the **Expiration Alerts** table, which includes these columns:
    a. **Expiration Notification Type** (e.g., “Pallet” or “Form”)
    b. **Name** of the form or Pallet ID
    c. **Days Until Expiration**, recalculated each day
    d. **Expiration Date**

Account Page



Purpose:
Allow users to securely update their login credentials by validating their current password and setting a new one to maintain account security.

How to use:
1. Enter your **Old Password** in the first field.
2. Type your desired **New Password**, ensuring it meets any complexity requirements.
3. Re-enter the **New Password** in **Confirm Password** to verify accuracy.
4. Click the **Update Password** button to submit.