Hi Santohsh,

Below are the requirements for the donation receipt generator. Further wrt. Our discussion I’ve detailed the requirements as much as possible, but there are some areas neither I’m not a specialist nor aware of the industry standards might need a change or based on the usage might need some tweaks in the system for the ease of operation. As a system specialist you can also suggest the suitable change. The blue highlighted texts are for your attention and needs your clarification/confirmation. Red highlighted texts are pending update from our side. Below are some of the topics that we wanted to discuss with you and understand.

1. Digital signature image Attachment on the Final PDF copy of the receipt
2. Data security confirmation
3. Access to the database (Edit, Modify and Delete)
4. Back up of the data base
5. Possibility of hosting it in the existing site. Is it possible to access only online or can we install it offline as well?
6. Final code base for future development & KT
7. Any other suggestion for the betterment of the system
8. How the tables will be maintained, year wise (export option to the DB should have the clear instruction)

Shirdi Saibaba Temple Arizona - Donation Receipt Generator Requirements

# Log-in Page

* 1. Provision to Capture ID and Password
  2. Validate and allow the user to log in if the credentials are correct
  3. Incorrect credentials allow three times, then either admin need to log in or the same user can’t login for another 10 minutes (**looking for your suggestion on the best functionality here**)
  4. Thinking to have user level authorization (**need to discuss and decide on this**)
     1. **Admin** (If admin password is missed, what is the option to retrieve it)
        1. Can do all the available options in the system
        2. Create new “user”
        3. Re-set the password for an existing user
     2. **User** 
        1. Enter the data and print the receipt, but report options will not be available
        2. **Can multiple users log in at different system at the same time?**

# Donation Receipt Organizer Page

* 1. [Donation Type](#_Donate_Type)
     1. [Regular Receipt](#_Regular_Receipt_(Hope)
     2. [Recurring Payment Receipt](#_Recurring_Payment_Receipt)
     3. [Merchandise Receipt](#_Merchandise_Receipt)
     4. [Services Receipt](#_Services_Receipt)
     5. [Import to DB (Excel](#_Export_from_excel))
  2. [Re-Print Receipt](#_Re-Print_Receipt) (Soft Copy or Hard Copy)
  3. [Report](#_Report)

* 1. **Donation Type**
     1. **Regular Receipt**

### (Hope you are taking care of all the basic validations on each field)

1. Name (*capture First Name, Middle Name & Last Name*) (Mandatory Field)
2. Date (mm/dd/yyyy) *(by default should display the current date, should be editable to modify the date)*
3. Address
4. Email
5. Contact #
6. Donation amount in Figure (Mandatory Field)
7. Donation amount in words (Mandatory Field)
8. Mode of payment - *Drop Down or Radio Button* (Mandatory Field) (Hope, at a time we need to select only one)
9. Cash
10. Cheque
11. Online
12. Mobile
13. Donation Received by
14. Provision to Attach Digital Signature Image
15. Submit Button at the bottom, On “Submit”
16. Data should be updated in the Data Base including
17. A unique receipt # should be generated along with bar code
18. Generate the receipt as per the template (with the provision to sign etc., ) and
19. Prompt “Print” and “Save” option for the generated receipt
    1. Print – Print the receipt with the printer attached to the system
    2. Save – Save the “.pdf” format in un-editable mode in the system (**need to see how it will be generated in PDF, will it be in the center of the page or the page itself will be the size of the receipt, etc**)
    3. **Sometimes we may need both if the devotees need both of them, provision to do both one after other**
       1. **Recurring Payment Receipt**

### (Hope you are taking care of all the basic validations on each field, just adding the additional need along withregular receipts here and the rest will be the same)

1. Provision to enter multiple dates, will use different template for printing (Mandatory Field)
   * 1. **Merchandise Receipt**

(**Hope you are taking care of all the basic validations on each field**)

1. Name (Mandatory Field)
2. Date (mm/dd/yyyy) *(by default should display the current date, should be editable to modify the date)*
3. Address
4. Email
5. Contact #
6. Merchandise Item (Mandatory Field)
7. Value (Mandatory Field)*(\* valued by the donor)*
8. Donation Received by
9. Submit Button at the bottom, On “Submit”
10. Data should be updated in the Data Base
11. A unique receipt # should be generated along with bar code
12. Generate the receipt as per the template (with the provision to sign etc., ) and
13. Prompt “Print” and “Save” option for the generated receipt
    1. Print – Print the receipt with the printer attached to the system
    2. Save – Save the “.pdf” format in the system (**need to see how it will be generated in PDF, will it be in the center of the page or the page itself will be the size of the receipt, etc**)
    3. **Sometimes we may need both if the devotees need both of them, provision to do both one after other**
       1. **Services Receipt**

(**Hope you are taking care of all the basic validations on each field**)

1. Name (Mandatory Field)
2. Date (mm/dd/yyyy) *(by default should display the current date, should be editable to modify the date)*
3. Address
4. Email
5. Contact #
6. Merchandise Item (Mandatory Field)
7. Hours Served (Mandatory Field)
8. Donation Received by
9. Submit Button at the bottom, On “Submit”
10. Data should be updated in the Data Base
11. A unique receipt # should be generated along with bar code
12. Generate the receipt as per the template (with the provision to sign etc., ) and
13. Prompt “Print” and “Save” option for the generated receipt
    1. Print – Print the receipt with the printer attached to the system
    2. Save – Save the “.pdf” format in the system (**need to see how it will be generated in PDF, will it be in the center of the page or the page itself will be the size of the receipt, etc**)
    3. **Sometimes we may need both if the devotees need both of them, provision to do both one after other**

* + 1. **[Import to DB (Excel](#_Export_from_excel))**

1. Sample template in which the system will accept the data
2. Option to select the updated file from the system and upload
3. Validate mandatory fields and update the data into the DB (**Based on the table structure, you need to confirm / suggest us, whether we can load multiple years or year by year**)
4. Error message after the validation, mentioning the missing mandatory fields
5. Confirmation for successful file load (**How the system will accommodate, ex… if the current month is March and if we upload Jan Month data**)
   1. **Re-Print Receipt**
6. Search the record by Name (**whichever is the best way, we are capturing First, Middle and Last Name**) or Receipt # (**Not sure whether any other search will be helpful here**)
7. Display the searched record (*in case of similar names or search with half receipt #, multiple records will be displayed*)
8. When the record is selected, provision to print (as mentioned above)
   1. **Report**
9. Open report to select the required fields (**can we run the report for all the years together or year y year**) (**looking for your suggestion on the other standard reports**)
10. Date range,
11. Payment mode [All, Cash, Cheque, Online, Mobile]
12. Type of Donation
    1. All
    2. Regular Receipt
    3. Recurring Payment Receipt
    4. Merchandise Receipt
    5. Services Receipt
13. Donation Amount Range
14. On “Submit” display the report along with “export” option. Based on this criteria, the generated report should have all the fields captured
15. On click “Export” report should be exported in excel and prompt to store it in the system
    1. **Appendix**
16. Receipt number format - we will update this section with the format
17. Sample Receipt Templates - we will update this section with the format