Software for Non-Profit Organization Bookkeeping

User Manual

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May 2020

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**1.Introduction**

This user manual will tell you about all of the actions that you can take on our website. This is meant to be used by all members of the organization so some actions are locked to some users. If you are unsure if you can participate in an action the account system is set up in a bit of a tier system. Admin accounts are at the top, followed by donor accounts, then Volunteers and then unregistered users. Admins have the most permissions, while volunteers and donors have separate permissions below that. Unregistered users have basic viewing permissions, but no more.

**1.1 System Requirements**

This product will run on most mainstream operating systems with most mainstream internet browsers.

**2.Getting Started**

Any person is able to visit the webpage. You are able to see the events that are being held. However, it is required to have an account to do any of the other actions. A regular new user that wants to make an account can make one of two kinds: a volunteer account or a donor account. To do this, select the button that says “create new account”. It will require that you fill in some basic contact information as well as information to identify you as. If you wish to donate money to the cause, you will pick donor, with this account you will be allowed to donate for any event that is being hosted. If a users wants to do both functions, he or she can create multiple accounts. You are unable to become an admin by yourself, that must be done through the organization itself and is an entirely different process. **An admin account has been created for testing purposes. Its log in credentials can be found in the glossary.** Once an account is logged into the system, the user is now able to do any of the actions that they are allowed to do, in addition to logging out. A user must be logged out to register, however.

**3.Volunteer Actions**

As a volunteer you are allowed to sign up to work at events.

**3.1 Volunteer for an Event**

On the event page you are able to select any event and select the option to volunteer for an event at a set time. You will be unable to sign up for any other events that happen at the same time in different locations. You should receive a message after selecting to volunteer at the time saying that it went through properly and the number of volunteers needed will go down.

**3.2 Cancel Volunteer for an Event**

The user may also cancel volunteering for an event in a similar way to signing up for one. By clicking the link to unvolunteer, a user is presented with a list of events they are signed up for. Upon clicking a button next to one of these events, the user will be brought back to the event page with a message confirming that they have successfully unvolunteered.

**4.Donor Actions**

Donor accounts have the ability to make both restricted and unrestricted donations to any event. These donations are tracked.

**4.1 Make Restricted Donation**

Making a restricted donation is making a specific donation to a certain event that is being hosted. This money will only be used by the organization for this event. This will be done by selecting an event to donate to and filling out the requisite information.

**4.2 Make Unrestricted Donation**

Making an unrestricted donation will send money to the organization that can be used for any of its needs. Money sent here can be used as a tax break as this is a real non-profit. This can be done by selecting the donation button and then choosing the unrestricted option.

**5 Administration Action**

Admins manage events and users, they are also able to look at the data that is stored through this website about its finances and volunteers.

**5.1 Create Account**

The main use of this function is that they may create a new admin account. They are the only people that can create a new account of this type. A user is unable to do this so the information must be filled in by a current admin. This must be done using the backend of the site.

**5.2 Delete Account**

This will do what is called a soft delete. The account will no longer be valid, the information such as hours volunteered or money donated will remain for the use of the organization. This can be done by entering the delete account screen and selecting the user to delete. For validation reasons, the admin will be asked to confirm the account deletion by re-entering the username.

**5.3 Review Data**

Enter the summary page and select the name of the person that you wish to get information about. It will return the hours volunteered and the amount of money donated.

**5.4 Create Event**

With an admin account a new option will be opened up to administrator: to create an event. This can be done by selecting the link to add an event on the event screen. The name of the event, times and the date must be input. In addition to this, the required number of volunteers must be selected, and the value cannot be negative. Once the Add Event button is pressed user will be notified and other users will be able to see it on the events page.

**5.5 Delete Event**

In the event page the admin also has the ability to select an event and delete it completely. Once again for validation, upon selecting to delete an event the admin will be required to re-enter the name of the event. If this happens the admin is given a notification that it was successful and the event will no longer be visible to any of the other users as well.

**6.Glossary**

**Admin-** Short for administrator account. A test administrator account has been created with the following credentials:

Username: testadmin

Password: test

The following test accounts have also been created:

Type: Volunteer

Username: testvol

Password: test

Type: Donor

Username: testdon

Password: test

Please note that this is a confidential document and the unpermitted use of these accounts by anyone is strictly prohibited.

**Permissions-** The ability to use the function based on the account status.