

# User Manual

## HOW TO USE DSS

Submitted to



# **INTRODUCTION**

This user manual is exclusively for employees with reporting officers for the ease of using DSS (Donor Service Solution). Following are the modules that are covered under this user manual:

- DASHBOARD
- NOTIFICATION BAR
- UTILITIES
- CHILD & BENEFICIARY
- LEADS(IP & CP)
- MANAGE DONOR
- MANAGE COLLECTIONS
- MANAGE REGULAR DONOR
- TRANSFER & ALLOCATION
- CLAW BACK & COMMISSION
- MIS REPORTS
- PRINTING/DISPATCH
- REMINDERS

# DASHBOARD


Dashboard will let you know about several donation collection data that are displayed to take any action. There are different collection data and activities that are displayed :

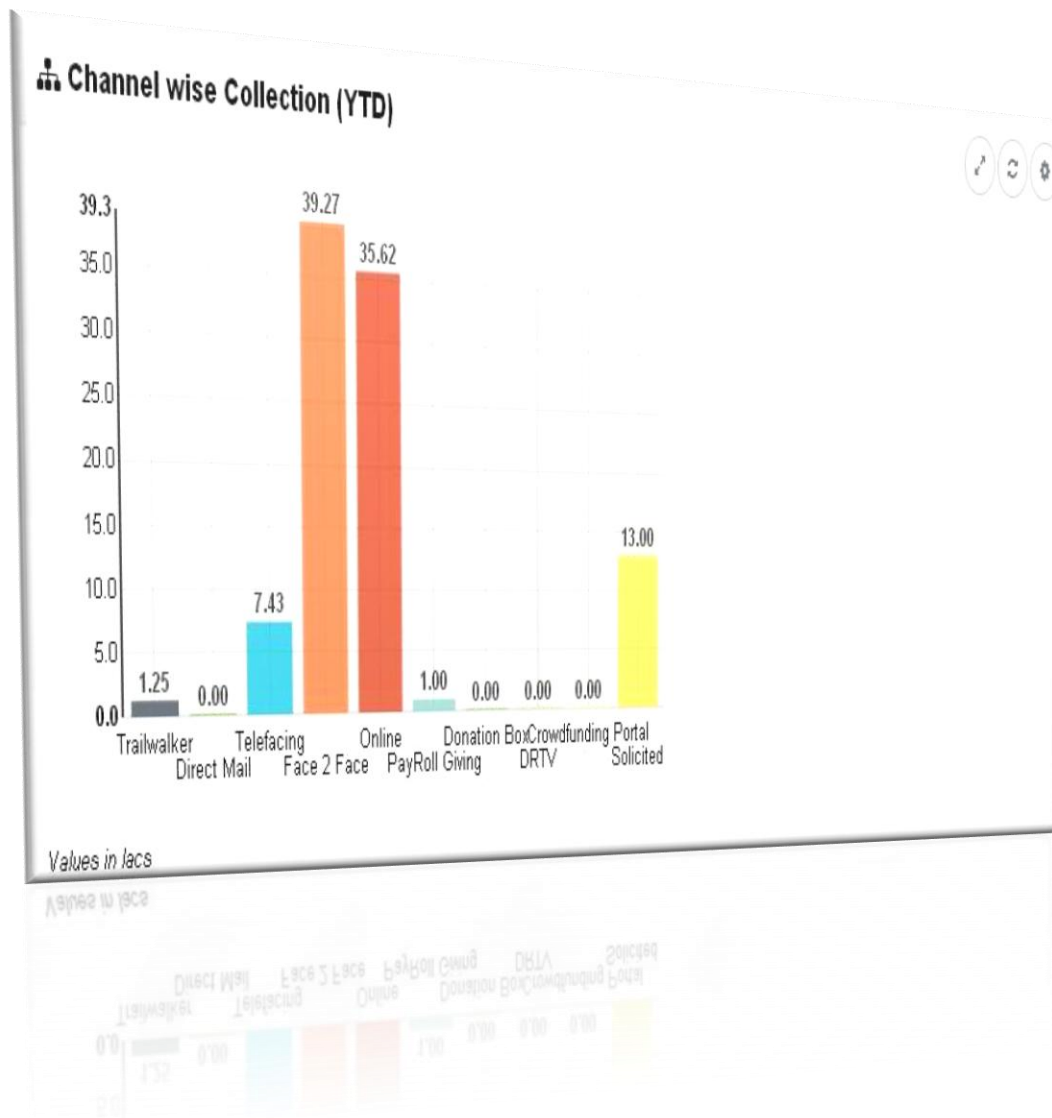
- \* Channel Wise Collection (YTD)
- \* Product Wise Collection (YTD)
- \* Pending Activity
- \* Important MIS
- \* Operations
- \* Widgets

Below is the screenshot of dashboard showing different modules of collection.




## 1) Channel Wise Collection (Year-To-Date)

On clicking  button, following screen will get open to display the Channel wise collection bar graph.

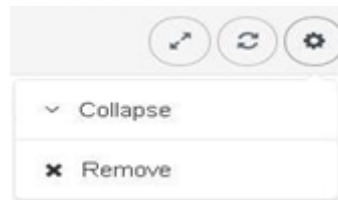


Here you can see the different Channels through which collections are coming and this data can be used for distinguishing and where needs improvement.




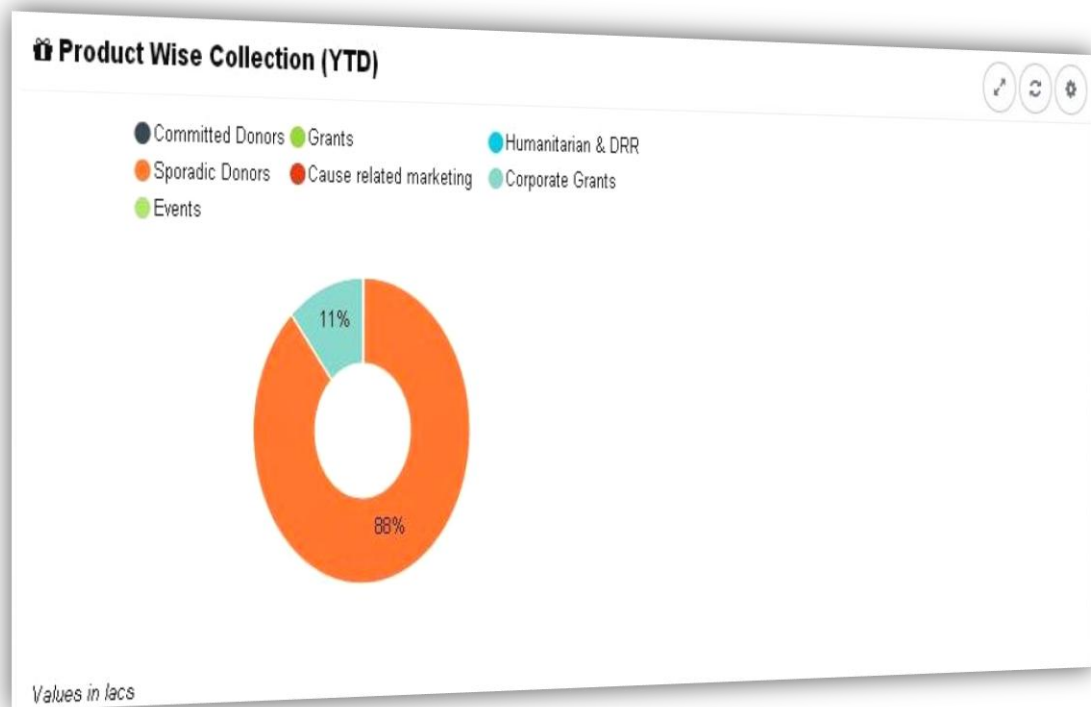
 this button is used to refresh the data,

 this button is used to display collapse table; show below




## 2) Product Wise Collection(YTD)

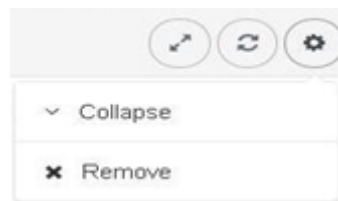
On clicking  button, following screen will appear to display the Product wise collection pie graph.




Here you can see the different Products through which collections are coming and this data can be used for distinguish and shows which sector needs improvement.

 this button is used to refresh the data,

 this button is used to display collapse table; show below




### 3) Pending Activity

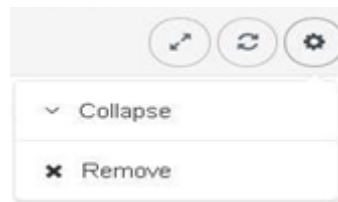
On clicking  button, following screen will appear to display the activities that are pending and needs to be complete.

🔔 Pending Activity (last 30 days)		
#	Type	Qty.
▶	Receipt Issue	0
▶	Receipts Send	0
▶	Donation Renewal	0
▶	Allocation	762
▶	Welcome Letter	597
▶	Thank You Letter	810


This table shows the activities or tasks (of last 30 days) that are pending and needs to be completed. For completion of the tasks please click on any of the events and that link redirects to un-completed task. Fulfill the need to make it disappear from this table.

 this button is used to refresh the data,

 this button is used to display collapse table; show below



#### 4) Important MIS


On clicking  button, following screen will appear and display the MIS (Management Information System) and (IP & CP) important tasks that needs to be showcased to carry on further organization processes.



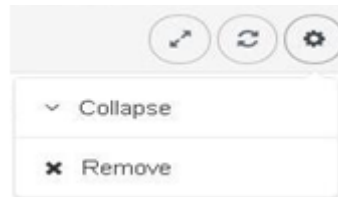
The screenshot shows a window titled 'Important MIS' with a subtitle 'IP & CP'. The window contains a table with the following data:

#	Type
▶	Collection Overview
▶	Collection Status (IP)
▶	Collection Status (CP)
▶	Reactivation
▶	Acquisition Productivity
▶	Donor Retention Analysis
▶	2 Year Active Donor
▶	2 Year Active Donor


This table showcase the different types of status, analysis, overview, productivity of the donated collection and also showcased the Active Donor base for last 2&3 years.

 this button is used to refresh the data,

 this button is used to display collapse table; show below



## 5) Operations


On clicking  button, following screen will appear, this window showcase the Today's collection that are donated through different organization.



The screenshot shows a window titled 'Operations' with a subtitle 'Today's Collections'. The window contains a table with three columns: 'Operation', 'Donor', and 'Collection'. The table lists eight different operations, each with a donor count of 0 and a collection amount of ₹ 0.00.

Operation	Donor	Collection
FR-AHENDABAD	0	₹ 0.00
FR-BANGALORE	0	₹ 0.00
FR-DELHI HO	0	₹ 0.00
FR-DELHI-1	0	₹ 0.00
FR-DELHI-2	0	₹ 0.00
FR-JAIPUR	0	₹ 0.00
FR-MUMBAI	0	₹ 0.00
FR-PUNE	0	₹ 0.00

This table shows the no. of donor's from a particular city and the total amount of collection that has been collected from all the donor's of a particular city.

 this button is used to refresh the data,

 this button is used to display collapse table; show below




## 6) Widgets

This is the widget bar that appears on the top of the dashboard (shown below)






These widgets are used as shortcuts or to get quick info about the donation's source, medium of donation, and the amount of donation.



To remove any widget, just click on the  button,



this widget shows the time, day, date and this widget has 3 small buttons in the bottom.









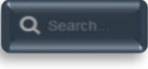


-  this button redirects to clock page.
-  this button redirects to reminder page where you can add reminders.
-  this button redirects to calendar page where you can add events.

# NOTIFICATION BAR

Notification bar is a very significant element of this whole DSS system. It allows user to quickly navigate through various functions by using notification bar.



There are various objects included in the notification bar as follows :

- Home 
- Potential Donor 
- Add Donor 
- Issue Receipt 
- Trouble Ticket 
- Pending Task 
- Pending Reminder 
- Pending Sponsor Allotment 
- Search Box 
- Expand List 
- Logout 

## 1) HOME




This button is referred to as the “Home” button. On whatever page you are working on, if you press this button, it redirects you to the Homepage/Dashboard page.


This button can also be used to reload the dashboard whenever it is required.

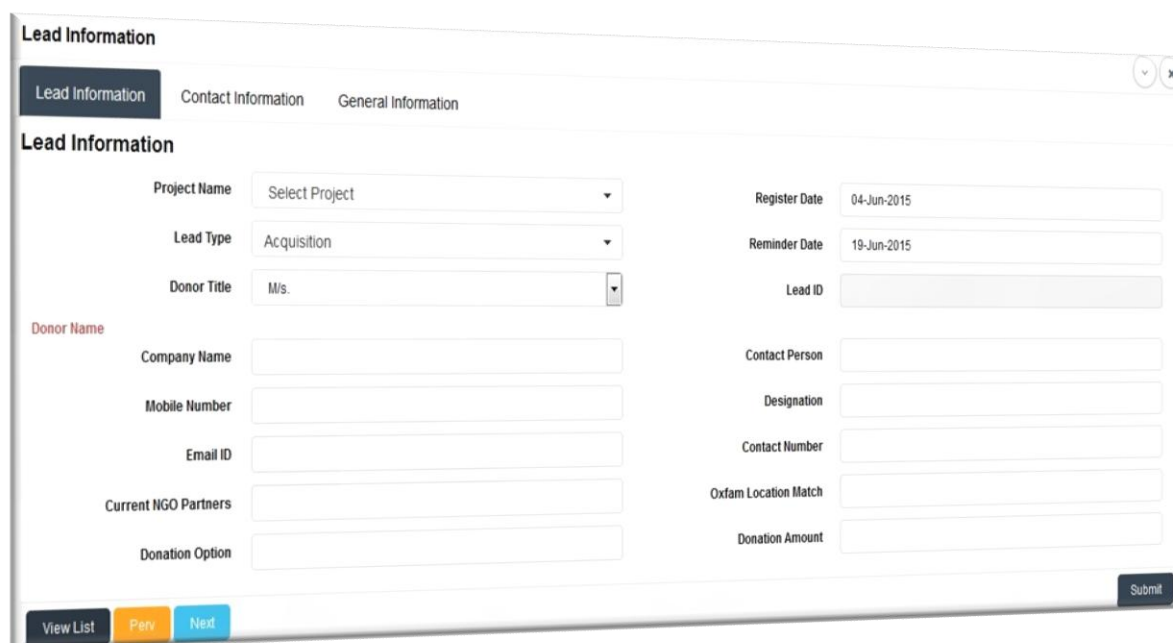
## 2) Potential Donor

Potential Donor is that individual who insists to donate some allowance or services as a donation to the organization, so it is necessary to make a note of the potential donation persons that can add up resources in the donation collection.

For adding information and contact details about the potential

donors, press this button .

A new page will open by pressing the button  to fill all the necessary details of the donor (shown below)



The screenshot shows a web form titled "Lead Information" with three tabs: "Lead Information", "Contact Information", and "General Information". The "Lead Information" tab is active. The form contains the following fields:


Project Name	Select Project	Register Date	04-Jun-2015
Lead Type	Acquisition	Reminder Date	19-Jun-2015
Donor Title	M/s.	Lead ID	
<b>Donor Name</b>		Contact Person	
Company Name		Designation	
Mobile Number		Contact Number	
Email ID		Oxfam Location Match	
Current NGO Partners		Donation Amount	
Donation Option			

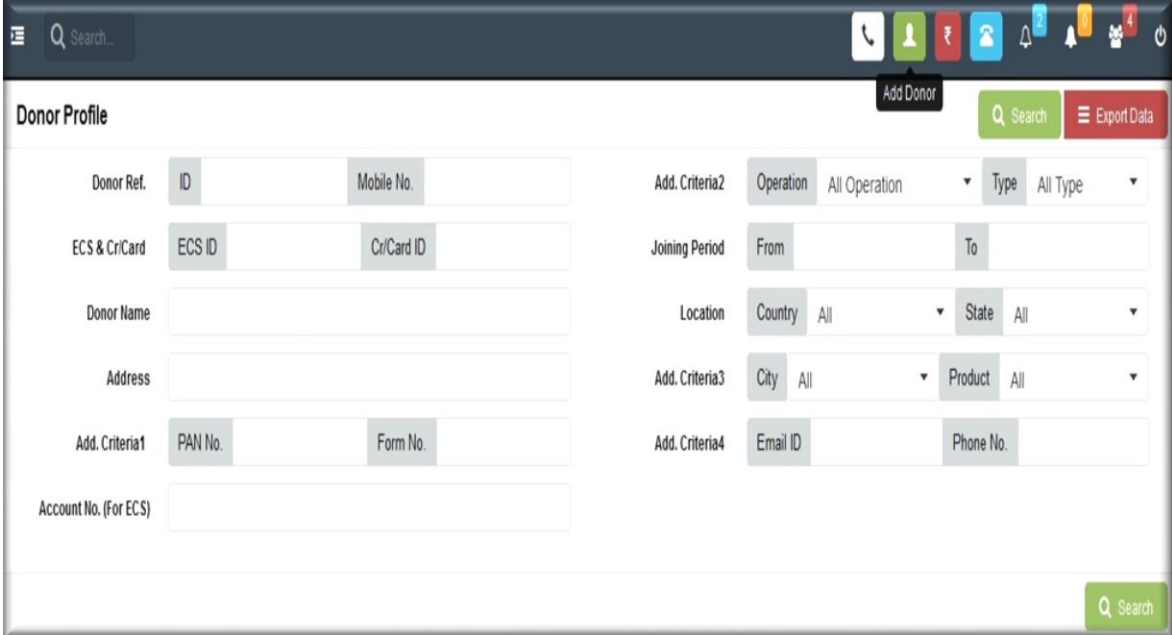
At the bottom of the form, there are three buttons: "View List", "Prev", and "Next", and a "Submit" button in the bottom right corner.

Fill the details in all the fields and after filling all the fields, click on the “Submit” button to finalize and save the information.



### 3) Add Donor


When an Individual/Organization make a donation, so to input the details of the donor press  button,




The screenshot shows a web application interface for adding a donor. At the top, there is a search bar and a navigation menu. Below the navigation, there is a header with 'Add Donor' and 'Export Data' buttons. The main form is titled 'Donor Profile' and contains the following fields:

- Donor Ref. ID (text input), Mobile No. (text input)
- ECS & CrdCard ECS ID (text input), CrdCard ID (text input)
- Donor Name (text input)
- Address (text input)
- Add. Criteria1 PAN No. (text input), Form No. (text input)
- Account No. (For ECS) (text input)
- Add. Criteria2 Operation (dropdown menu), All Operation (dropdown menu), Type (dropdown menu), All Type (dropdown menu)
- Joining Period From (text input), To (text input)
- Location Country (dropdown menu), All (dropdown menu), State (dropdown menu), All (dropdown menu)
- Add. Criteria3 City (dropdown menu), All (dropdown menu), Product (dropdown menu), All (dropdown menu)
- Add. Criteria4 Email ID (text input), Phone No. (text input)


A 'Search' button is located at the bottom right of the form.

- After pressing  “Add donor” button, the new page “Donor Profile” appears (shown above).
- In the following page fill all the required fields and then press the button “Search”. It will search is there is any duplicate donor profile available.
- If there is any duplicate profile, then it will show up.
- Otherwise press the “Add Donor” button to register the new donor (shown below).

DonorID	Name	Operation	Product	Address	Location	Last Cont.	Status	Reminder	View	Receipt	Edit
No Result Found.											
											

## 4) Issue Receipt

After the donor has made the donation to the organization and then to finalize that transaction there is need to generate the donation receipt.



To issue the receipt, click on  button.

Clicking this button will redirect you to page “**Donor Search to Issue Receipt**”.

**Donor Search to Issue Receipt** Q Search Export Data

Donor Ref.	ID	Mobile No.	Add. Criteria2	Operation	All Operation	Type	All Type
ECS & Cr/Card	ECS ID	Cr/Card ID	Joining Period	From	To		
Donor Name			Location	Country	All	State	All
Address			Add. Criteria3	City	All	Product	All
Add. Criteria1	PAN No.	Form No.	Add. Criteria4	Email ID		Phone No.	

Q Search

DonorID	Name	Operation	Product	Address	Location	Status	Contributions / Sponsorship	Receipt Issue
NCO195775	MS. VASANTHY SUBRAMANIAM Mobile No.: 984915421,	NCO/1	ONE TIME DONORS	SYNOPSIS. BANGALORE, Bangalore / Bengaluru, Karnataka India Pin: 560033 Email : ssvaasanthy@gmail.com	National	PAYING		

Search the donor of whom you want to issue the receipt by entering the name or id.

After the search is over, the specified donor showed up.  
There are two operations that can be done;



To view contribution details,



To issue receipt

## 5) Trouble Ticket

Any trouble or complain that donor have during their process of donation or during the transaction process.

Than that complain conversion information will be stored as Trouble Ticket.

### Donor Search

Donor Title	<input type="text" value="Select Title"/>	Donor ID	<input type="text" value="NCO/23"/>	Mobile No	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>	Last	<input type="text"/>
Address 1	<input type="text"/>	Address 2	<input type="text"/>	Operation	<input type="text" value="All Operation"/>
Country	<input type="text" value="Select Country"/>	State	<input type="text" value="Select State"/>	City	<input type="text" value="Select State"/>
ECS ID	<input type="text"/>	Credit Card ID	<input type="text"/>	Phone No	<input type="text"/>
Vertical	<input type="text" value="All Vertical"/>	Donor Type	<input type="text" value="All type"/>	Product	<input type="text" value="All product"/>
Email ID	<input type="text"/>	Joining Date (F)	<input type="text"/>	Joining Date (T)	<input type="text"/>
Form No	<input type="text"/>	PAN Number	<input type="text"/>		


Show  entries

Search:

Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Last Cont.	Status	View Ticket	Trouble Ticket
1.	NCO/23	TIRLOCHAN ANAND Mobile No. : 1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	4,000.00 16-Nov-2006	NON-PAYING <small>Click for reasons</small>	<input type="button" value="View Ticket"/>	<input type="button" value="Trouble Ticket"/>

Showing 1 to 1 of 1 entries

Previous **1** Next

By clicking  button, it redirects you to page (shown above). Enter the details of the donor that has any issue, then click on the **“Search”** button to initiate donor search.

Show  entries


Search:


Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Last Cont.	Status	View Ticket	Trouble Ticket
1.	NCO/23	TIRLOCHAN ANAND Mobile No. : 1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	4,000.00 16-Nov-2006	NON-PAYING <small>Click for reasons</small>	<input type="button" value="View Ticket"/>	<input type="button" value="Trouble Ticket"/>

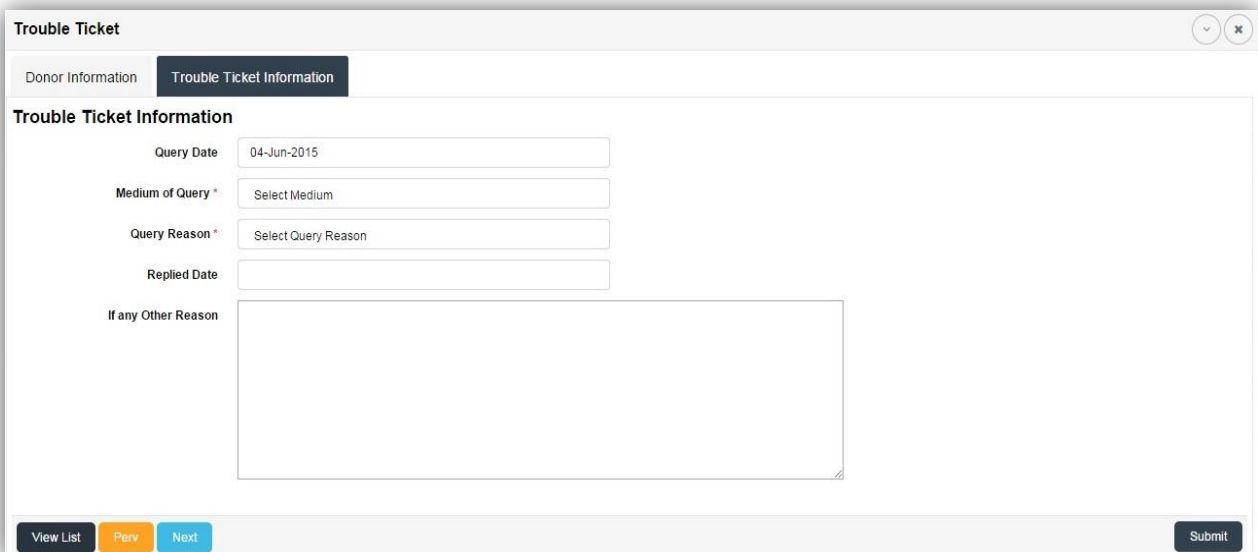
Showing 1 to 1 of 1 entries

Previous **1** Next

 To view details of the ticket

 To add the ticket

By pressing the button  , this will redirects you to new page to add new ticket (shown below).




The screenshot shows a web application window titled "Trouble Ticket". It has two tabs: "Donor Information" and "Trouble Ticket Information", with the latter being active. The form contains the following fields:

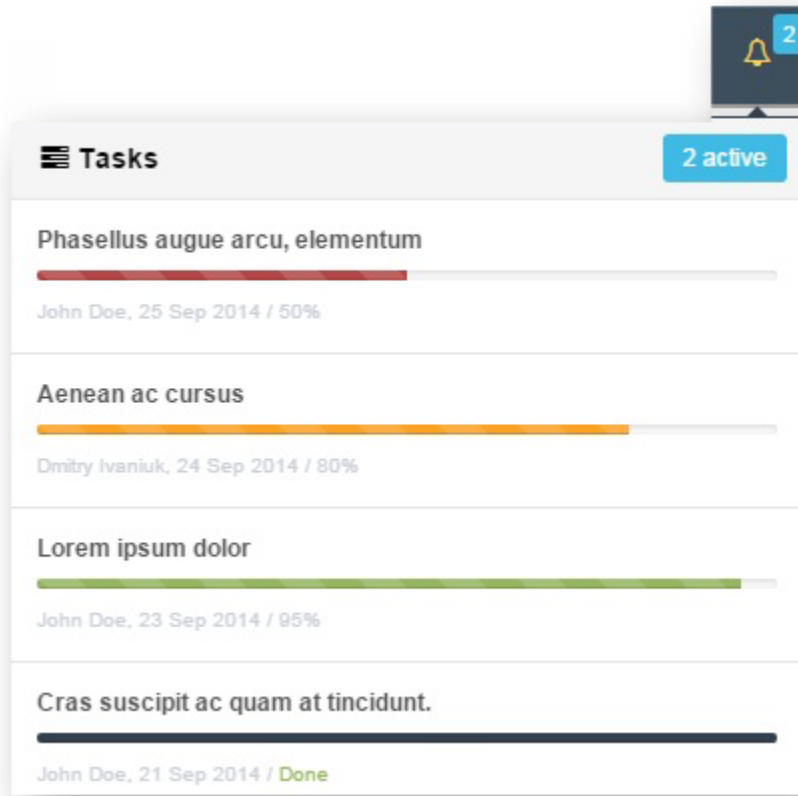
- Query Date:** A text input field containing "04-Jun-2015".
- Medium of Query \*:** A dropdown menu with "Select Medium" as the selected option.
- Query Reason \*:** A dropdown menu with "Select Query Reason" as the selected option.
- Replied Date:** An empty text input field.
- If any Other Reason:** A large, empty text area for additional details.

At the bottom of the form, there are four buttons: "View List" (grey), "Prev" (orange), "Next" (blue), and "Submit" (dark grey).

Fill up all the fields with the given information and press “**Submit**” button to finalize the ticket.

## 6) Pending Task


By clicking on this icon , the pending task list will show up.



This list displays all tasks that are active and need to be completed. It displays the name, date and percentage of the completion of the task.

After the task gets completed it will automatically disappear from the notification.

## 7) Pending Reminder


By clicking on this icon , the pending reminder list will show up.

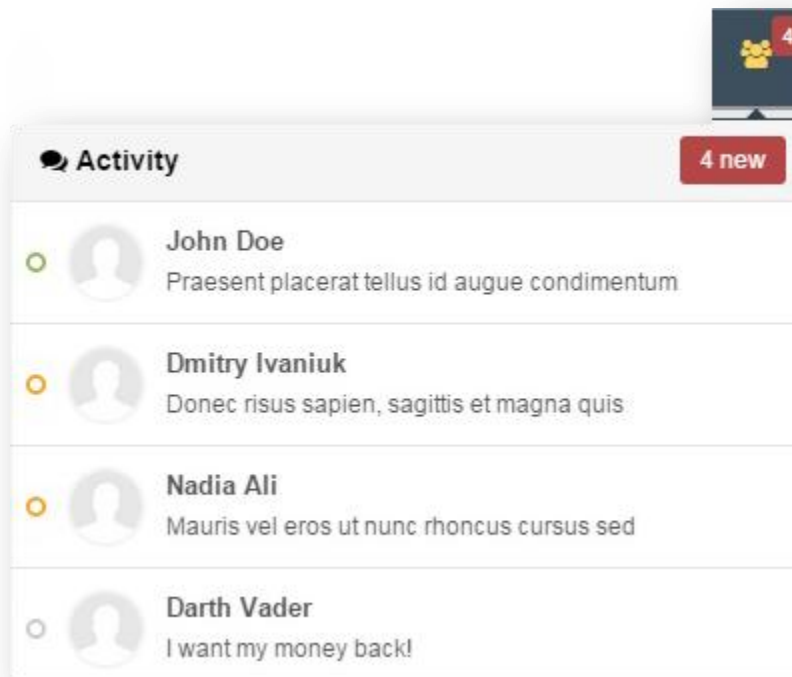


This list display all reminder that are active and need to be completed. The reminder that you have set for doing particular tasks are showed here.

After the reminder is attended, it will automatically disappear from the notification.

## 8) Pending Sponsor Allotment

By clicking on this icon  , the pending sponsor allotment list will show up.



This list display all activities that are active and need to be completed. The activities and comments that are allotted by sponsor are showed here.


After the activities is attended, it will automatically disappear from the notification.

## 9) Search Box

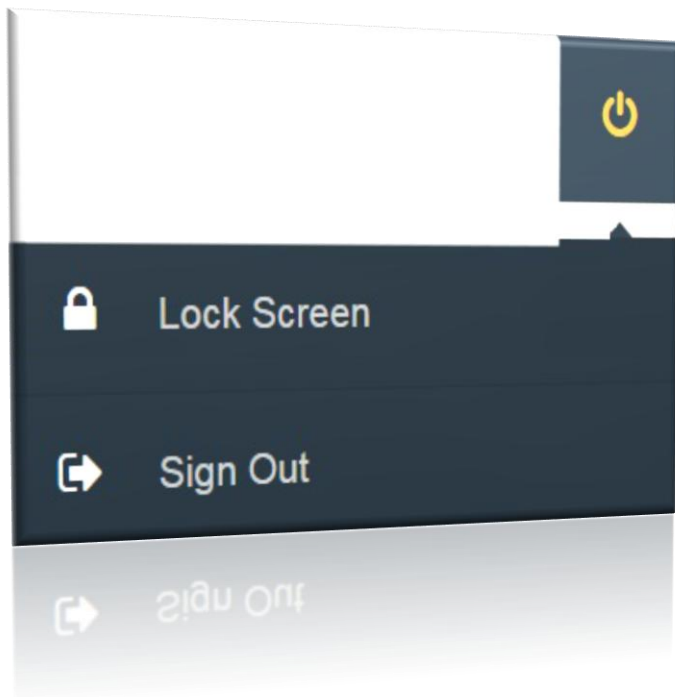
This is the search box (shown below), used to search the information that is stored in the DSS application system.



## 10) Logout

To logout from the account press  icon .  
It will show two sub-categories options :

- Lock Screen
- Sign Out



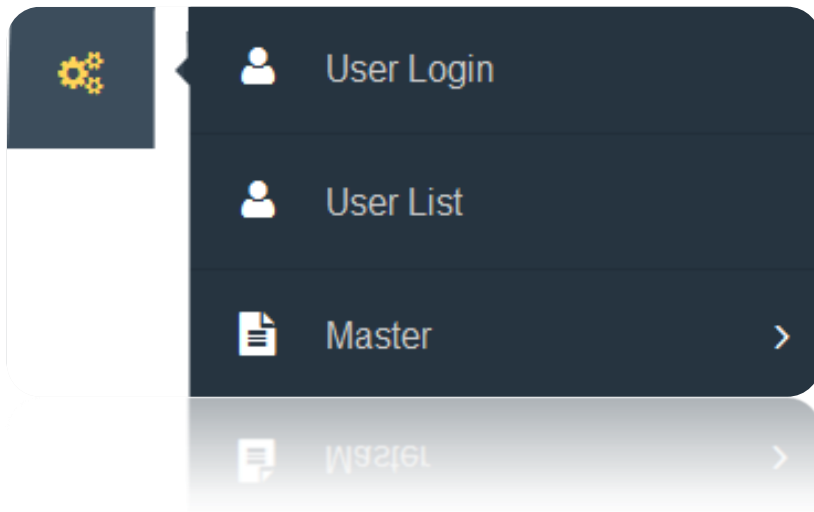
- Lock screen will lock your screen and only after entering the password you will be able to sign in again.
- Sign Out option will redirect you to the log in start page.



# UTILITIES

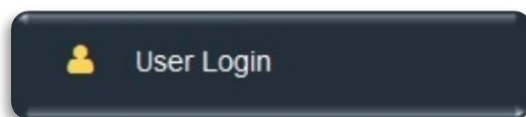
Utilities consist of three sub-categories modules :

- User Login
- User List
- Master



## ▪ User Login

Click on *Utilities* << *User Login* to access the option.



New users can be created through this option, after clicking on the “**User Login**” option new page will load.

First click on **“User Information”** tab.  
Enter all the details of user and then click **“next”** button.

The screenshot shows the 'User Login' application window with the 'User Information' tab selected. The form contains the following fields:

- Operation Name: A dropdown menu with 'Select Operation Name' as the placeholder.
- User ID: A text input field.
- First Name: A text input field.
- Last Name: A text input field.
- Contact No: A text input field.
- Fax No: A text input field.
- Email ID: A text input field.
- User Type: A dropdown menu with 'Other' selected.

At the bottom of the form, there are four buttons: 'View List' (grey), 'Previous' (orange), 'Next' (blue), and 'Submit' (dark grey).

In **“User Role”** select the appropriate options to finalize the process.

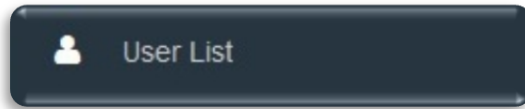
The screenshot shows the 'User Login' application window with the 'User Role' tab selected. The form contains the following sections and options:

- Operation:**
  - FR-PUNE
  - FR-BANGALORE
  - FR-DELHI-1
  - FR-JAIPUR
  - FR-DELHI-2
  - FR-DELHI HO
  - FR-AHEMDABAD
  - FR-MUMBAI
- Vertical:**
  - AFFILIATE
  - INSTITUTION
  - CORPORATE INDIVIDUAL
  - TRUST
  - CORPORATE PARTNERSHIP
  - INDIVIDUAL
- Donor Type:**
  - AFFILIATE
  - GENERAL DONATION
  - CORPORATIONS
  - GOVERNMENT
  - FOUNDATIONS/TRUSTS
  - HNI GOLD (50001 TO 75000)
  - GENERAL (1 TO 6000)
  - HNI PLATINUM (75001 TO 150000)

Click on **“Submit”** button to save and create a new user.

## ▪ User List

Select this option to view the list of no. of users created.



After clicking on this option the list of the users will show up (shown below).

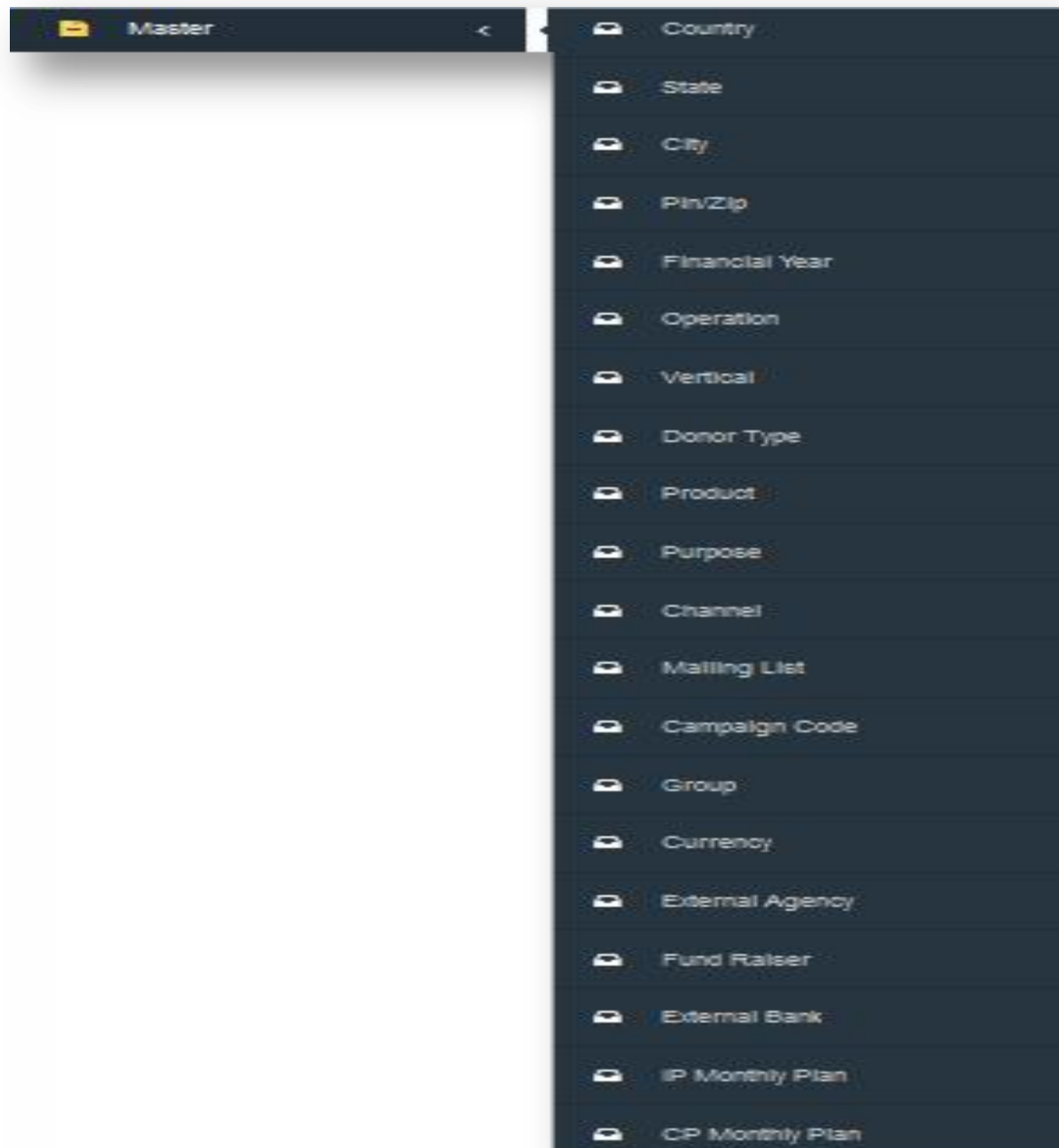
SI No.	User ID	User Name	Email ID	Operation	Login Status	Reset Password	Edit
2.	JagritiMishra	Jagriti Mishra	subodh@oxfamindia.org	NCO/1	✓	↻	✎
3.	admin	Admin		NCO/1	👤	↻	✎
4.	asdsad	assad sadsa	adas	AMH/7	✓	↻	✎
5.	avinashbansal	Avinash Bansal	avinashb@oxfamindia.org	NCO/1	✓	↻	✎
6.	fareenakhan	Fareena Khan	fareena@oxfamindia.org	NCO/1	✓	↻	✎
7.	nehakaushik	Neha kaushik	nehak@oxfamindia.org	NCO/1	✓	↻	✎
8.	poojaaeron	Pooja Aeron	pooja@oxfamindia.org	NCO/1	✓	↻	✎
9.	rinasoni	Rina Soni	rina@oxfamindia.org	NCO/1	✓	↻	✎
10.	rohitkaushik	Rohit Kaushik	rohit@oxfamindia.org	NCO/1	✓	↻	✎

## ▪ Master

Master is an entity that is created one –time and it is utilized again and again wherever there is required.

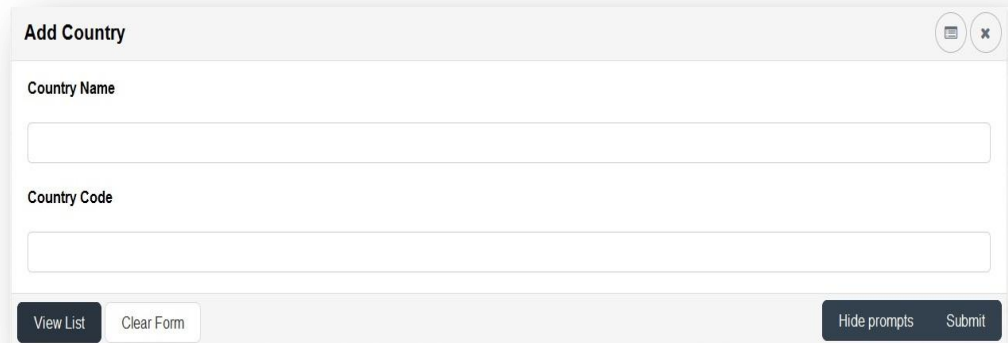


There are 20 sub-categories modules in the Master directory,



i. Country

Click on “**Country**” option to access the “**Add Country**” page.



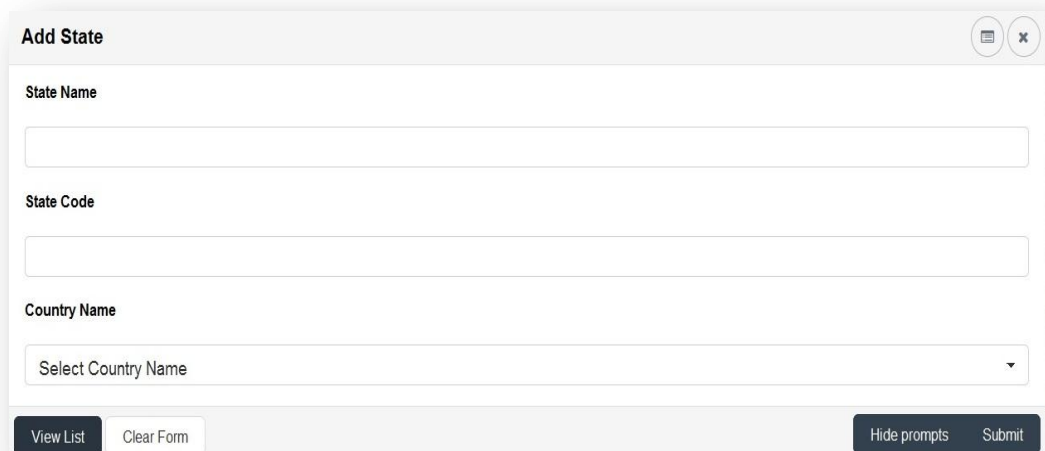
The screenshot shows a web form titled "Add Country". It has a title bar with a close button (X) and a help icon. The form contains two text input fields: "Country Name" and "Country Code". At the bottom, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of countries click “**View List**” button.

ii. State

Click on “**State**” option to access the “**Add State**” page.



The screenshot shows a web form titled "Add State". It has a title bar with a close button (X) and a help icon. The form contains three input fields: "State Name" (text), "State Code" (text), and "Country Name" (dropdown menu with the placeholder text "Select Country Name"). At the bottom, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of states click “**View List**” button.

iii. City

Click on “City” option to access the “Add City” page.

The screenshot shows a web form titled "Add City". It features a title bar with a close button. The form contains the following fields:

- City Name:** A text input field.
- City Code:** A text input field.
- State Name:** A dropdown menu with the placeholder text "Select State Name".
- Country Name:** A dropdown menu with the placeholder text "Select Country Name".

At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “Submit” button.

To view the list of cities click “View List” button.

iv. Pin/Zip

Click on “Pin/Zip” option to access the “Add Pin/Zip” page.

The screenshot shows a web form titled "Add Pin/Zip". It features a title bar with a close button. The form contains the following fields:

- Pin/Zip:** A text input field.
- City Name:** A dropdown menu with the placeholder text "Select City Name".
- State Name:** A dropdown menu with the placeholder text "Select State Name".
- Country Name:** A dropdown menu with the placeholder text "Select Country Name".

At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Pin/Zip code click “**View List**” button.

v. Financial year

Click on “**Financial year**” option to access the “**Add Financial year**” page.

The screenshot shows a web form titled "Add Financial Year". The form has the following fields:

- Year ID:
- Start Date:
- End Date:
- Opening Prior 35AC:
- Max Limit 35AC:
- Opening Prior 80G:
- Max Limit 80G:
- Closing:

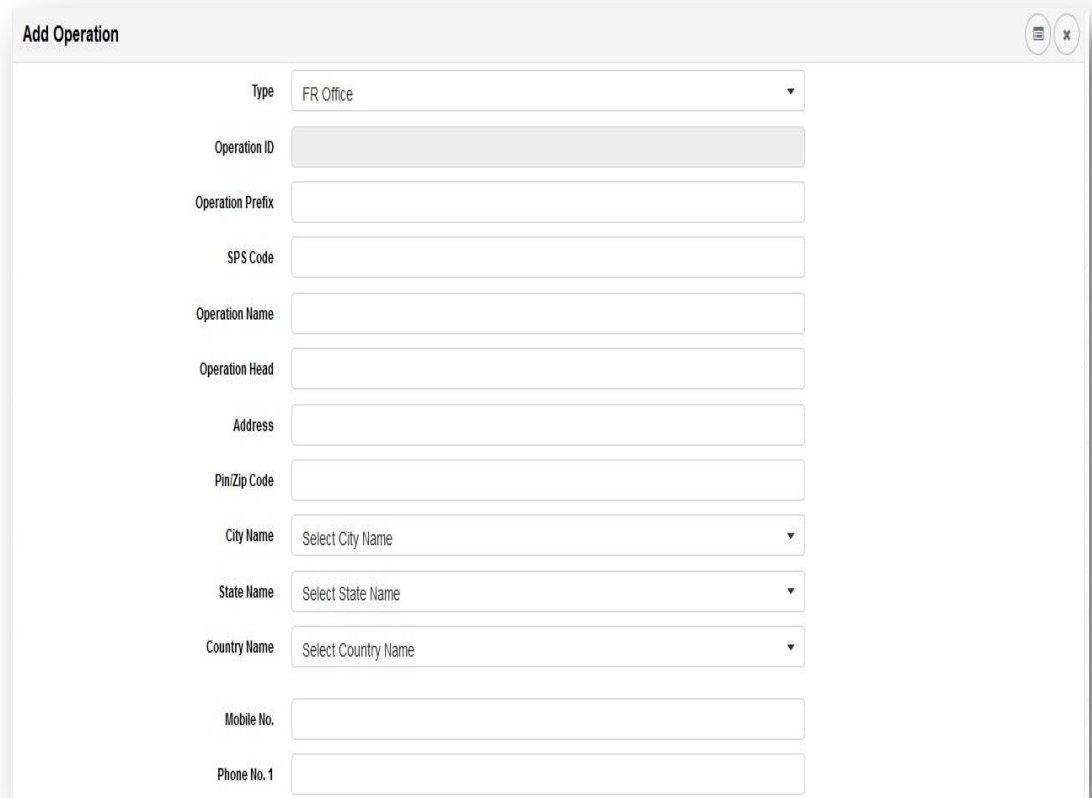
At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Financial year click “**View List**” button.

vi. Operation

Click on “**Operation**” option to access the “**Add Operation**” page.



The screenshot shows a web form titled "Add Operation" with a header bar containing a menu icon and a close button. The form contains the following fields:

- Type: A dropdown menu with "FR Office" selected.
- Operation ID: A text input field that is currently disabled (greyed out).
- Operation Prefix: A text input field.
- SPS Code: A text input field.
- Operation Name: A text input field.
- Operation Head: A text input field.
- Address: A text input field.
- Pin/Zip Code: A text input field.
- City Name: A dropdown menu with "Select City Name" selected.
- State Name: A dropdown menu with "Select State Name" selected.
- Country Name: A dropdown menu with "Select Country Name" selected.
- Mobile No.: A text input field.
- Phone No. 1: A text input field.

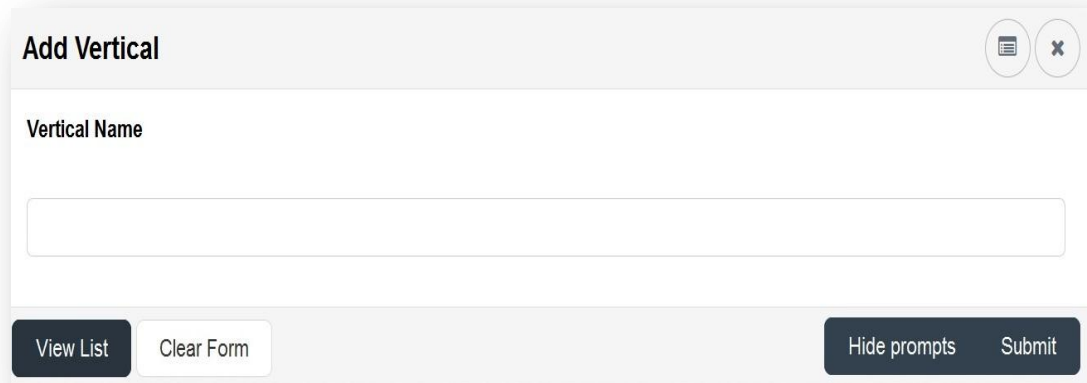
Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Operations click “**View List**” button.



vii. Vertical

Click on “**Vertical**” option to access the “**Add Vertical**” page.



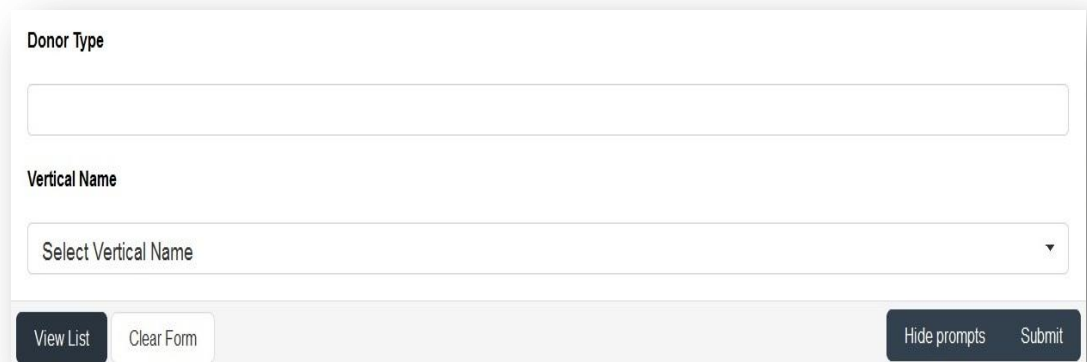
The screenshot shows a window titled "Add Vertical". At the top right of the window are two circular icons: one with a list symbol and one with an 'x' for closing. Below the title bar, the label "Vertical Name" is positioned above a single-line text input field. At the bottom of the window, there are four buttons: "View List" (dark grey), "Clear Form" (light grey), "Hide prompts" (dark grey), and "Submit" (dark grey).

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Vertical click “**View List**” button.

viii. Donor Type

Click on “**Donor Type**” option to access the “**Add Donor Type**” page.



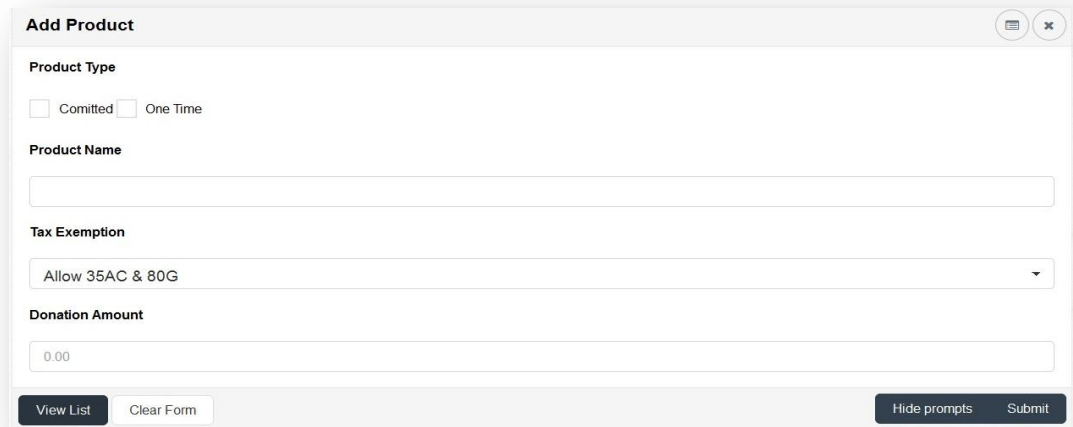
The screenshot shows a window titled "Donor Type". Below the title bar, there is a text input field. Below that is the label "Vertical Name" followed by a dropdown menu with the text "Select Vertical Name" and a downward arrow. At the bottom of the window, there are four buttons: "View List" (dark grey), "Clear Form" (light grey), "Hide prompts" (dark grey), and "Submit" (dark grey).

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Donor Type click “**View List**” button.

ix. Product

Click on **“Product”** option to access the **“Add Product”** page.



The screenshot shows a web form titled "Add Product". At the top right, there are window control icons (minimize, maximize, close). The form contains the following fields and controls:

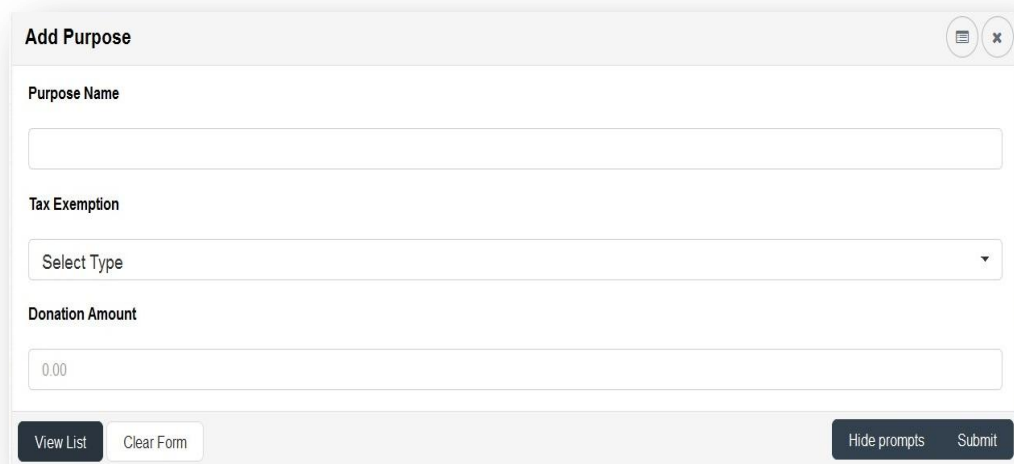
- Product Type:** Two radio buttons labeled "Comitted" and "One Time".
- Product Name:** A text input field.
- Tax Exemption:** A dropdown menu with the selected option "Allow 35AC & 80G".
- Donation Amount:** A text input field with the value "0.00".
- Buttons:** "View List" and "Clear Form" are on the left; "Hide prompts" and "Submit" are on the right.

Fill all the required details in the form and after finalizing click on **“Submit”** button.

To view the list of Product click **“View List”** button.

x. Purpose

Click on **“Purpose”** option to access the **“Add Purpose”** page.



The screenshot shows a web form titled "Add Purpose". At the top right, there are window control icons (minimize, maximize, close). The form contains the following fields and controls:

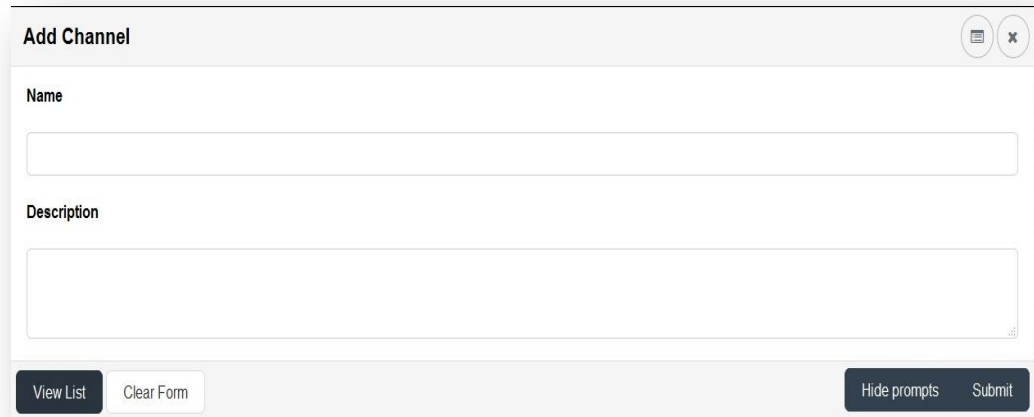
- Purpose Name:** A text input field.
- Tax Exemption:** A dropdown menu with the selected option "Select Type".
- Donation Amount:** A text input field with the value "0.00".
- Buttons:** "View List" and "Clear Form" are on the left; "Hide prompts" and "Submit" are on the right.

Fill all the required details in the form and after finalizing click on **“Submit”** button.

To view the list of Purpose click **“View List”** button.

xi. Channel

Click on “**Channel**” option to access the “**Add Channel**” page.



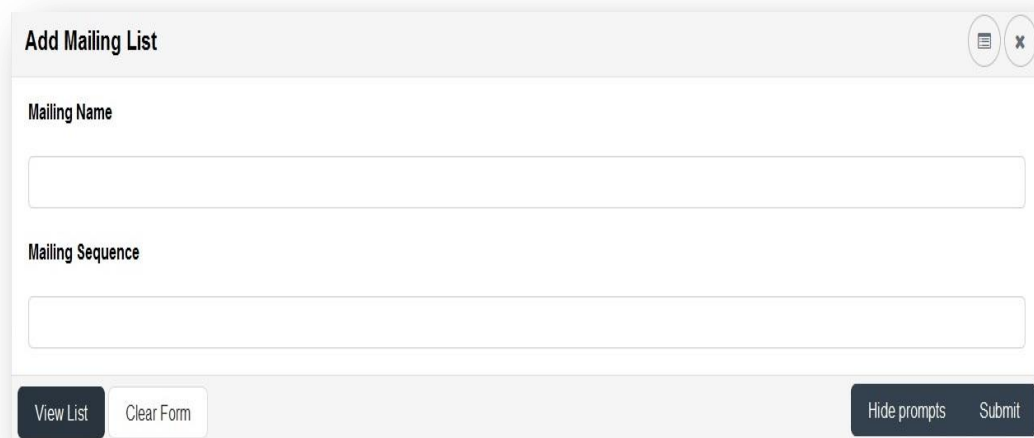
The screenshot shows a web form titled "Add Channel". The form has a title bar with a close button. Below the title bar, there are two input fields: "Name" and "Description". At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Channel click “**View List**” button.

xii. Mailing List

Click on “**Mailing List**” to access the “**Add Mailing List**” page.



The screenshot shows a web form titled "Add Mailing List". The form has a title bar with a close button. Below the title bar, there are two input fields: "Mailing Name" and "Mailing Sequence". At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Mailing List click “**View List**” button.

xiii. Campaign Code

Click on “**Campaign Code**” option to access the “**Add Campaign**” page.

The screenshot shows a web form titled "Add Campaign". It features several dropdown menus: "Vertical" (with "Select Vertical Name" as a placeholder), "Channel" (with "Select Channel Name"), "Mailing Option" (with "Select Mailing Name"), and "External Agency" (with "Select Agency Name"). Below these are text input fields for "Initial Code", "Year" (with "Select Year" as a placeholder), "Sequence", "List Code", "Communication", and "Campaign Code". To the right of the form, there are four "Description" labels, each followed by a text input field. At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Campaign click “**View List**” button.

xiv. Group

Click on “**Group**” option to access the “**Add Group**” page.

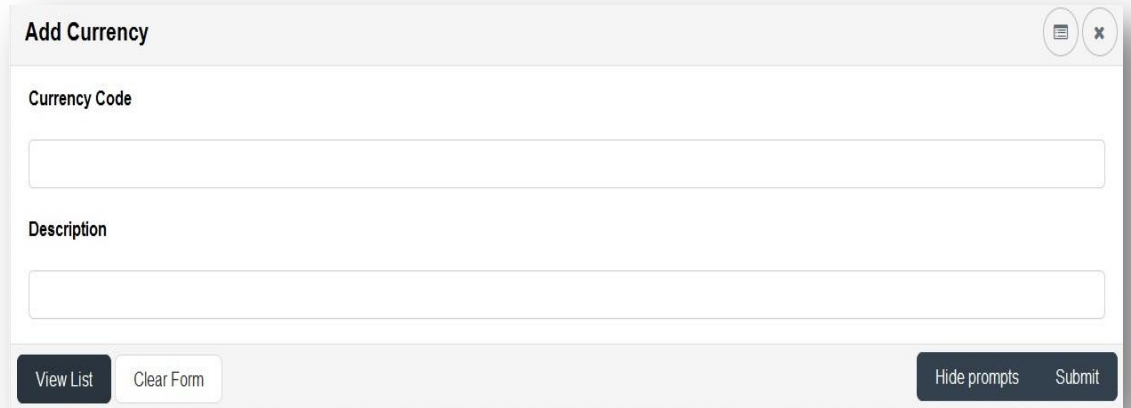
The screenshot shows a web form titled "Add Group". It features three main input fields: "Group Name" (a text input field), "Group Code" (a text input field), and "Group Type" (a dropdown menu with "Corporate" selected). At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Group click “**View List**” button.

xv. Currency

Click on “**Currency**” option to access the “**Add Currency**” page.



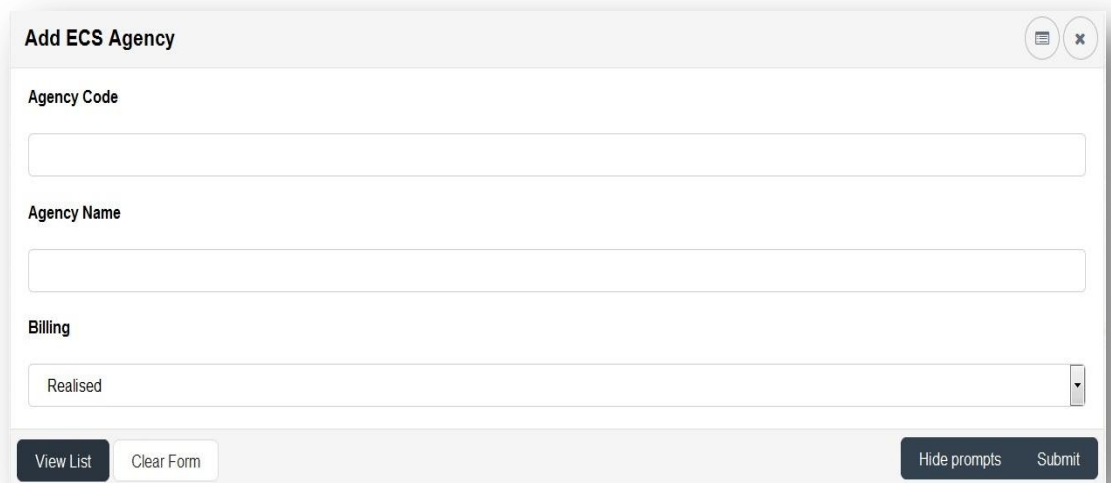
The screenshot shows a web form titled "Add Currency". It features two text input fields: "Currency Code" and "Description". Below the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Currency click “**View List**” button.

xvi. External Agency

Click on “**External Agency**” option to access the “**Add ECS Agency**” page.



The screenshot shows a web form titled "Add ECS Agency". It features three input fields: "Agency Code", "Agency Name", and "Billing" (a dropdown menu with "Realised" selected). Below the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of ECS Agency click “**View List**” button.

xvii. Fund Raiser

Click on “**Fund Raiser**” option to access the “**Add Fund Raiser**” page.

The screenshot shows a web form titled "Add Fund Raiser". It has a header with a close button (X) and a menu icon. The form is organized into two columns. The left column contains the following fields: "Code \*" (text input), "First Name \*" (text input), "Last Name \*" (text input), "Designation \*" (text input), "Mobile No. \*" (text input), and "Email Id \*" (text input). The right column contains: "Pin/Zip Code \*" (text input), "Address 1 \*" (text input), "Address 2" (text input), "City Name" (dropdown menu with "Select City Name" as the prompt), "State Name" (dropdown menu with "Select State Name" as the prompt), and "Country Name" (dropdown menu with "Select Country Name" as the prompt). At the bottom of the form, there are three buttons: "View List" (light blue), "Clear Form" (light blue), and "Submit" (dark blue).

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view the list of Fund Raiser click “**View List**” button.

xviii. External Bank

Click on “**External Bank**” option to access the “**Add External Bank**” page.

The screenshot shows a web form titled "Add External Bank". It has a header with a close button (X) and a menu icon. The form contains a single column of input fields: "Bank Name" (text input), "MICR Code" (text input), "Branch Name" (text input), "City Name" (dropdown menu with "Select City Name" as the prompt), "State Name" (dropdown menu with "Select State Name" as the prompt), and "Country Name" (dropdown menu with "Select Country Name" as the prompt). At the bottom of the form, there are four buttons: "View List" (light blue), "Clear Form" (light blue), "Hide prompts" (dark blue), and "Submit" (dark blue).

Fill all the required details in the form and after finalizing click on “**Submit**” button.

To view list of External Bank click “**View List**” button.

xix. IP Monthly Plan

Click on “**IP Monthly Plan**” option to access the “**Add IP Monthly Plan**” page.

Year	Select Year	Operation	Select Operation Name
Jan	0.00		
Feb	0.00		
Mar	0.00		
Apr	0.00		
May	0.00		
Jun	0.00		
Jul	0.00		
Aug	0.00		
Sep	0.00		
Oct	0.00		
Nov	0.00		
Dec	0.00		

Fill all the required details in the form and after finalizing click on “**Submit**” button. To view the list of IP Monthly Plan click “**View List**” button.

xx. CP Monthly Plan

Click on “**CP Monthly Plan**” option to access the “**Add CP Monthly Plan**” page.

Year	Select Year	Operation	Select Operation Name
Jan	0.00		
Feb	0.00		
Mar	0.00		
Apr	0.00		
May	0.00		
Jun	0.00		
Jul	0.00		
Aug	0.00		
Sep	0.00		
Oct	0.00		
Nov	0.00		
Dec	0.00		

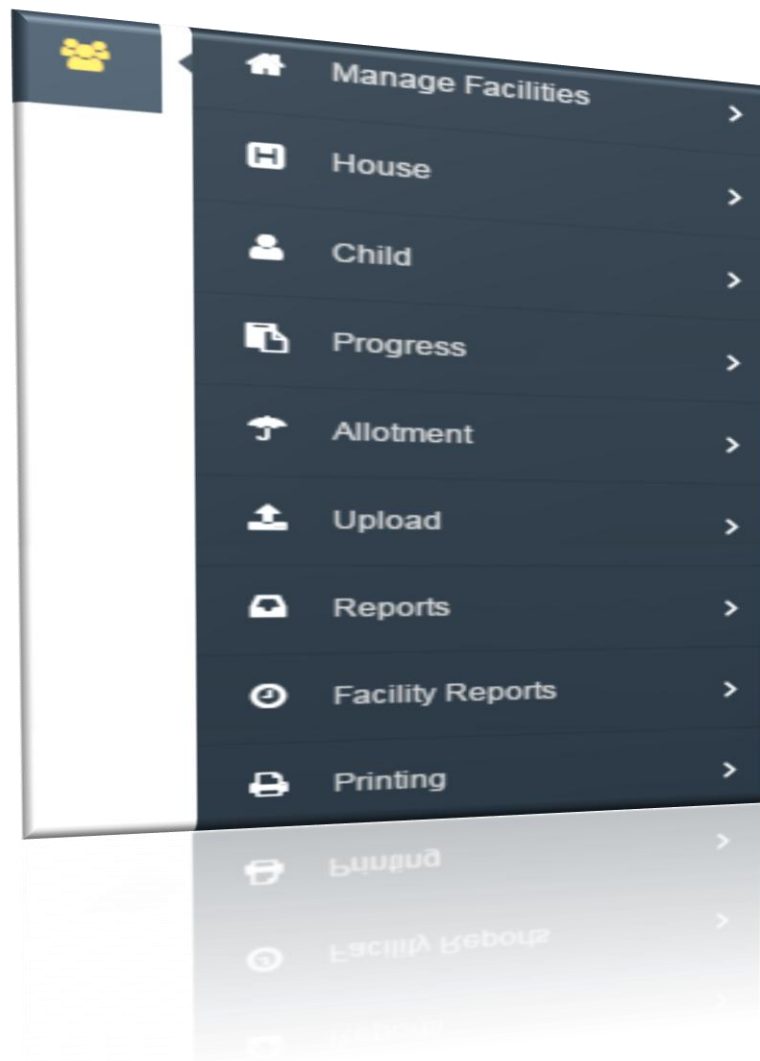
Fill all the required details in the form and after finalizing click on “**Submit**” button. To view the list of CP Monthly Plan click “**View List**” button.

# CHILD & BENEFICIARY

Child & Beneficiary includes the managing, caring and reporting the progress of child as per required.

There are nine sub-categories modules in Child & Beneficiary:

- Manage Facilities
- House
- Child
- Progress
- Allotment
- Upload
- Reports
- Facility Reports
- Printing

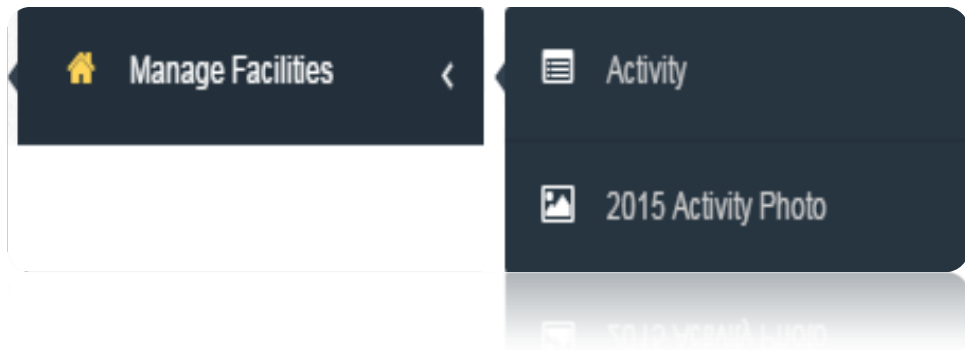




## 1) Manage Facilities

There are two sub-categories modules in Manage Facilities:

- Activity
- 2015 Activity Photo



### Activity

To add the Facility Activity fill all the required details in the “Add Facilities Activity” page.

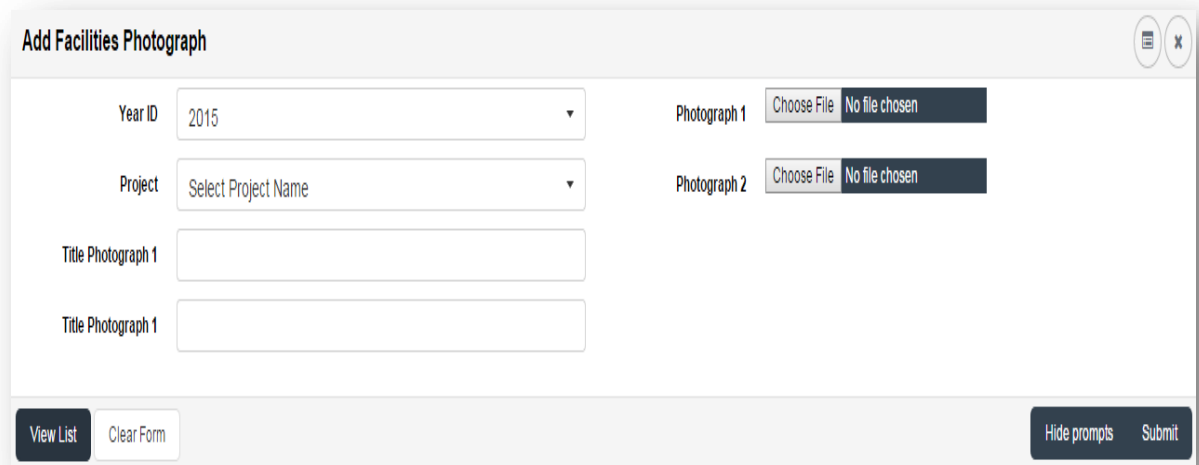
Then press “**Submit**” button to finalize the process.

A screenshot of a mobile application form titled 'Add Facilities Activity'. The form has a light gray header with a close button. The main content area contains several input fields: 'Project' is a dropdown menu with 'Select Project Name' selected; 'Activity Name' is a text input field; 'Activity Date' is a text input field; 'Details' is a larger text input field. On the right side, there are two 'Photograph' fields, each with a 'Choose File' button and a 'No file chosen' status. At the bottom, there are four buttons: 'View List', 'Clear Form', 'Hide prompts', and 'Submit'.

## 2015 Activity Photo

To add the Facility Photograph fill all the required details in the “Add Facilities Photograph” page.

Then press “**Submit**” button to finalize the process.



The screenshot shows a web form titled "Add Facilities Photograph". The form contains the following fields and controls:

- Year ID:** A dropdown menu with "2015" selected.
- Project:** A dropdown menu with "Select Project Name" selected.
- Photograph 1:** A file upload control with a "Choose File" button and "No file chosen" text.
- Photograph 2:** A file upload control with a "Choose File" button and "No file chosen" text.
- Title Photograph 1:** A text input field.
- Title Photograph 1:** A second text input field.

At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

## 2) House

There are three sub-categories modules in House:

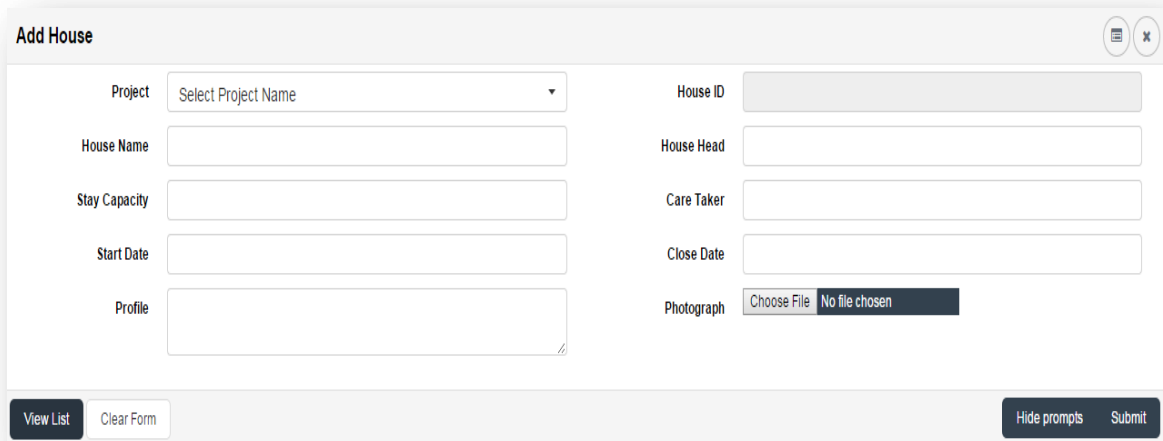
- Profile
- Activity
- Allot FHS



## Profile

To add new House, fill all the required details in the “Add House” page.

Then press “**Submit**” button to finalize the process.

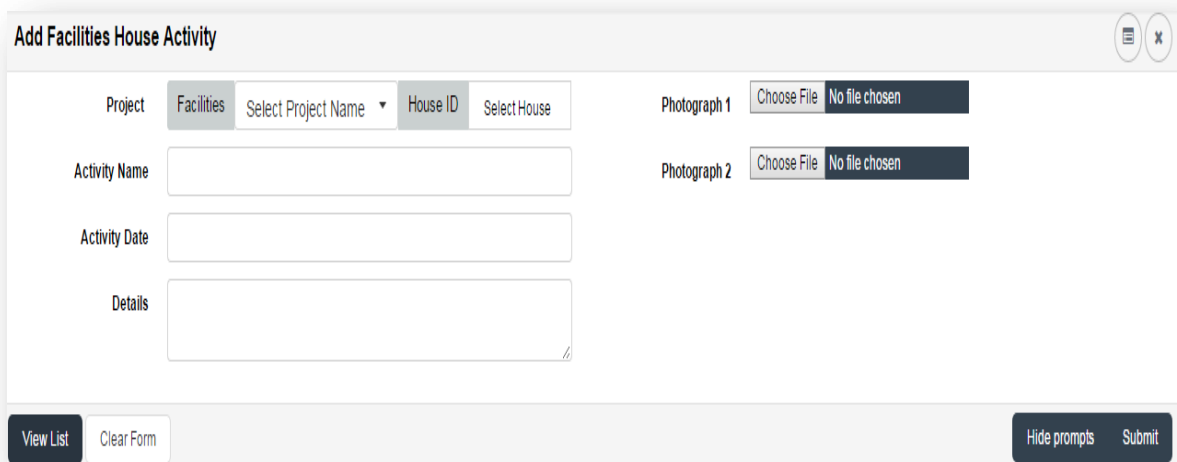


The screenshot shows a web form titled "Add House". The form is organized into two columns of input fields. The left column contains: "Project" (a dropdown menu with "Select Project Name" selected), "House Name", "Stay Capacity", "Start Date", and "Profile" (a text area). The right column contains: "House ID", "House Head", "Care Taker", "Close Date", and "Photograph" (a file upload button labeled "Choose File" and "No file chosen"). At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

## Activity

To add new facility House activity, fill all the required details in the “Add Facilities House Activity” page.

Then press “**Submit**” button to finalize the process.



The screenshot shows a web form titled "Add Facilities House Activity". The form is organized into two columns of input fields. The left column contains: "Project" (a dropdown menu with "Facilities" selected and "Select Project Name" below it), "Activity Name", "Activity Date", and "Details" (a text area). The right column contains: "House ID" (a dropdown menu with "Select House" below it), "Photograph 1" (a file upload button labeled "Choose File" and "No file chosen"), and "Photograph 2" (a file upload button labeled "Choose File" and "No file chosen"). At the bottom of the form, there are four buttons: "View List", "Clear Form", "Hide prompts", and "Submit".

## Allot FHS

Fill all the required details in the “Family Home Sponsorship Allotment” page.

Then press “**Search**” button to initialize the search process.

Then the search result record show three operations :



Click to view allotted FHS details.



Click to allot Family Home Sponsorship.



Click to Unlink Family Home Sponsorship.

### Family Home Sponsorship Allotment

Project **Facilities**

Extra Search

---

Show  entries Search:

SI No.	House ID	House Name	Project Name	House Head	Care Taker	Stay Capacity	View	Allot FHS	Unlink
1.	1	TEST	FR-BANGALORE	A	S	10			

Showing 1 to 1 of 1 entries

### 3) Child

There are two sub-categories modules in Child:

- Child Profile
- Beneficiary Profile



#### Child Profile

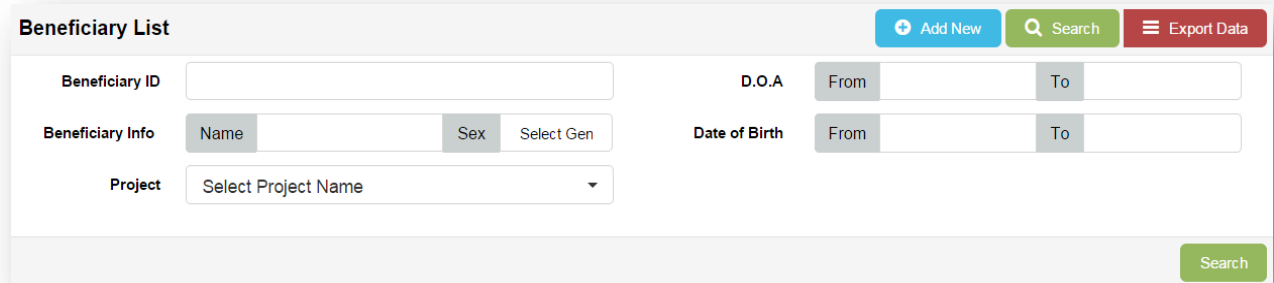
Fill all the required fields in the “Child List” page and then press “**Search**” button to view the details of specified child. This tab is used to view the Child wise list.

A screenshot of the 'Child List' form. The form has a light gray background and a white border. At the top left, it says 'Child List'. At the top right, there are three buttons: 'Add New' (blue with a plus icon), 'Search' (green with a magnifying glass icon), and 'Export Data' (red with a list icon). The form is divided into several sections: 'Child' with 'Child ID' and 'KDI ID' fields; 'Reference' with 'Name', 'Sex', and 'Select Gen' fields; 'Project' with 'Facilities', 'Select Name', 'House ID', and 'Select' fields; 'Additional Info' with 'Sponsorship', 'All', 'Stay', and 'All' fields; 'Date of Admit' with 'From' and 'To' fields; and 'Date of Birth' with 'From' and 'To' fields. At the bottom right, there is a green 'Search' button with a magnifying glass icon.

Click this button to add new Child.

## Beneficiary Profile

Fill all the required fields in the “Beneficiary List” page and then press “**Search**” button to view the details of specified beneficiary.



The screenshot shows the 'Beneficiary List' form. At the top right, there are three buttons: 'Add New' (blue), 'Search' (green), and 'Export Data' (red). The form contains several input fields: 'Beneficiary ID' (text box), 'D.O.A' (Date of Arrival) with 'From' and 'To' date pickers, 'Beneficiary Info' with 'Name' (text box), 'Sex' (dropdown), and 'Select Gen' (dropdown), 'Date of Birth' with 'From' and 'To' date pickers, and 'Project' (dropdown menu with 'Select Project Name'). A 'Search' button is located at the bottom right of the form.

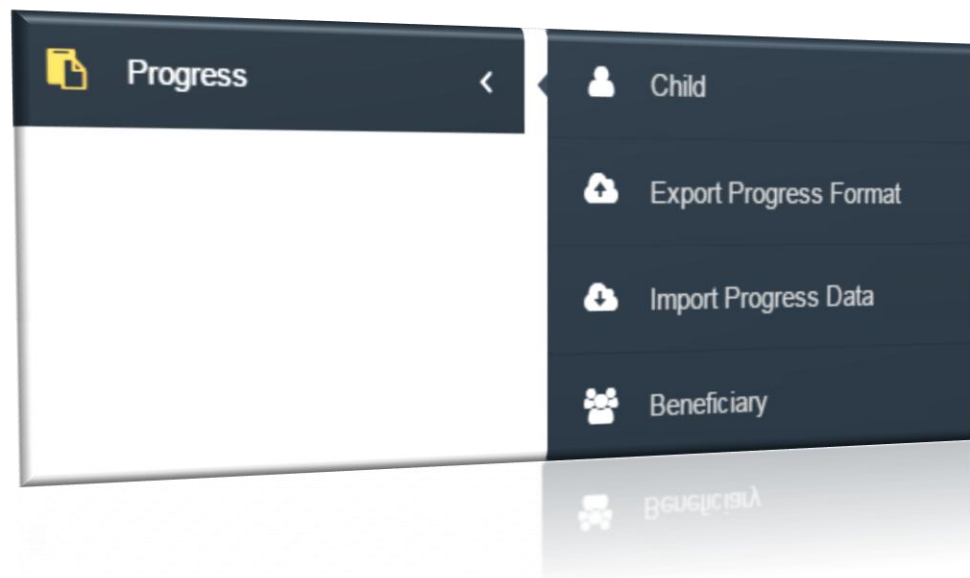


Click this button to add new beneficiary.

## 4) Progress

There are two sub-categories modules in Child:

- Child Profile
- Beneficiary Profile



# Child

Fill all the required fields in the “Child List” page and then press “**Search**” button to view the details of specified child. This tab is used to view the Child wise list.

### Child List

Q Search Export Data

**Child Reference** Child ID  KDI ID

**Additional Info** Sponsorship  All Stay  All

**Child Info** Name  Sex  Select Gender





**Date of Admit** From  To

**Project** Facilities  Select Name  House ID  Select House

**Date of Birth** From  To

Q Search

Show  entries Search:

Sl No.	Child ID	Child Name	Gender	Date of Birth	Date of Admission	Project Name	House ID	Add Progress	View
1.	4	SIRISHA PERLA	M	08-May-1980	11-May-2015	FR-BANGALORE	1		
2.	5	KKUMARAN	M	07-Apr-1995	11-May-2015	FR-BANGALORE	1		

Showing 1 to 2 of 2 entries Previous **1** Next



Click this button to add Progress.



Click this button to view Child Progress.

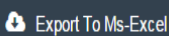
## Export Progress Format

Fill all the required fields in the “Export Child Progress Information” page and then press “Export To Ms-Excel” button to export the child progress Information.

### Export Child Progress Information

Facility Name *	<input type="text" value="Select Facility Name"/>	House ID:	<input type="text" value="All House"/>
Year *	<input type="text" value="2015"/>		



\* Required Field



## Import Progress Data

Fill all the required fields and choose the required file in the “Upload Progress File” tab in “Upload Progress File (.csv Format)” page. Then press “**Upload File**” button to finalize the uploading process.

### Upload Progress File (.csv Format)



 

**Upload Progress File** | Import Progress Data

Facility Name *	<input type="text" value="Select Name"/>	Uploaded File	<input type="text" value="Select File Name"/>
Progress File *	<input type="text" value="Choose File"/> No file chosen <small>(file format except only .csv)</small>		

**Note:** Remove first row of every file, before upload child progress information.

\* Required Field



Fill all the required fields and choose the required file in the “Import Progress Data” tab in “Upload Progress File (.csv Format)” page. Then press “**Import Data**” button to finalize the importing process.

Upload Progress File (.csv Format)

Upload Progress File    **Import Progress Data**

Year \*    2015    Progress File \*    Select File Name

\* Required Field    **Import Data**

## Beneficiary

Fill all the required fields in “Beneficiary List” page. Then press “**Search**” button to initialize the searching process.

Beneficiary List    **Search**    **Export Data**

Project    Facility    Select Facility Name    Beneficiary ID    Date of Admit    From    To

Child Info    Beneficiary Name    Sex    All G    Date of Birth    From    To

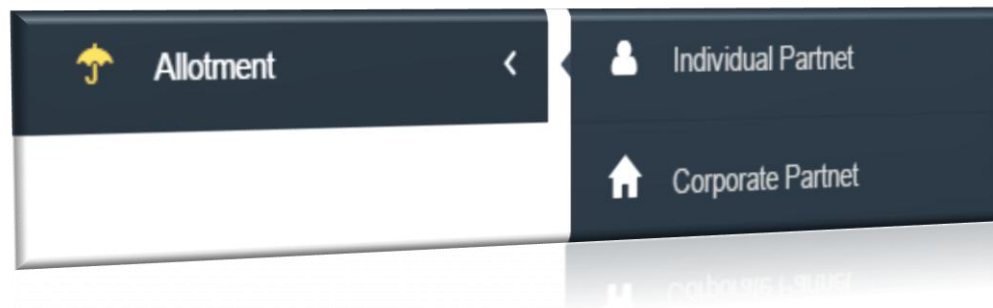
**Search**

This will show the beneficiary wise list.

## 5) Allotment

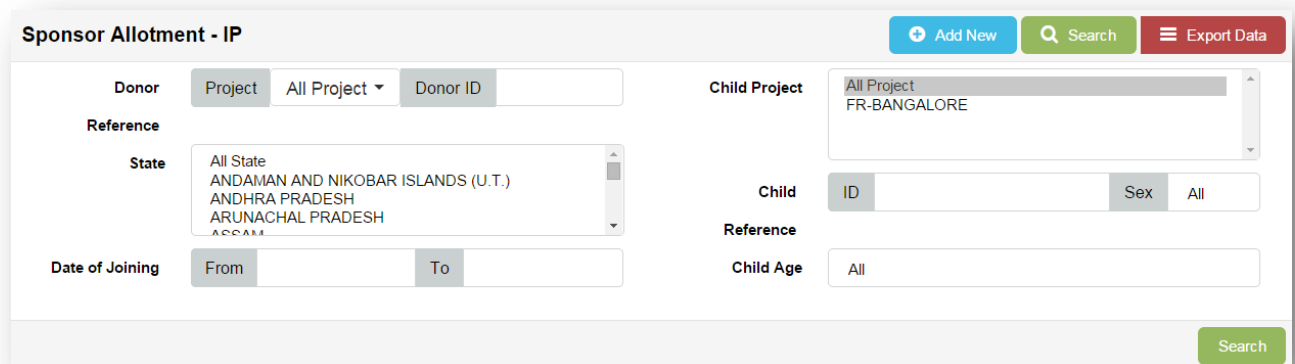
There are two sub-categories modules in Allotment:

- Individual Partner
- Corporate Partner



### Individual Partner

Fill all the required fields in the “Sponsor Allotment-IP” page and then press “**Search**” button to view the detailed list of specified Individual Sponsor Allotment.

A screenshot of a web application form titled 'Sponsor Allotment - IP'. The form has a light gray background and a white border. At the top right, there are three buttons: 'Add New' (blue), 'Search' (green), and 'Export Data' (red). The form contains several input fields and dropdown menus. On the left side, there are fields for 'Donor' (with a 'Project' dropdown and 'All Project' selected), 'Donor ID', 'Reference', 'State' (with a dropdown menu showing 'All State', 'ANDAMAN AND NIKOBAR ISLANDS (U.T.)', 'ANDHRA PRADESH', 'ARUNACHAL PRADESH', and 'ASSAM'), and 'Date of Joining' (with 'From' and 'To' sub-fields). On the right side, there are fields for 'Child Project' (with a dropdown menu showing 'All Project' and 'FR-BANGALORE'), 'Child' (with 'ID', 'Sex', and 'All' sub-fields), 'Reference', and 'Child Age' (with 'All' selected). A green 'Search' button is located at the bottom right of the form.

Click this button to add new profile.

## Corporate Partner

Fill all the required fields in the “Sponsor Allotment-CP” page and then press “**Search**” button to view the detailed list of specified Corporate Sponsor Allotment.

**Sponsor Allotment - CP** + Add New Q Search ≡ Export Data

**Donor** Project: All Project Donor ID:

**Reference** State:   
ANDAMAN AND NIKOBAR ISLANDS (U.T.)  
ANDHRA PRADESH  
ARUNACHAL PRADESH  
ASSAM

**Date of Joining** From:  To:

**Child Project**   
FR-BANGALORE

**Child** ID:  Sex:

**Reference**

**Child Age**

Search



Click this button to add new profile.

## 6) Upload

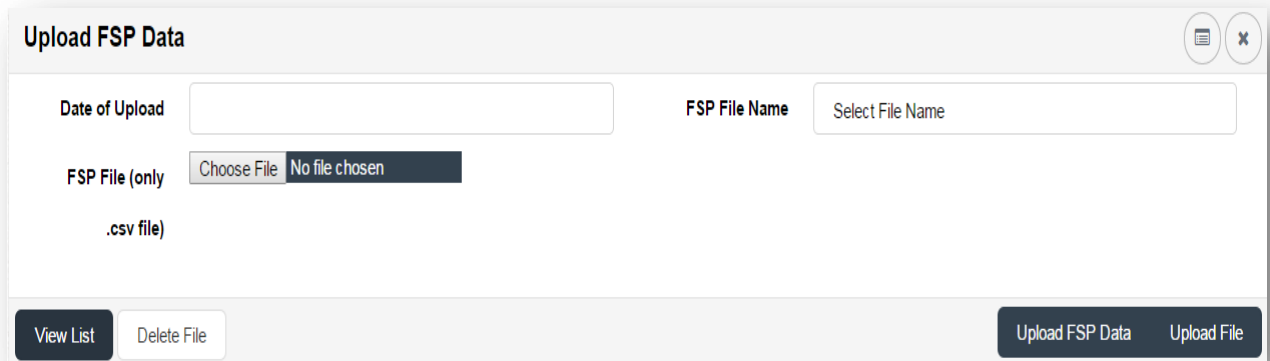
There are two sub-categories modules in Upload:

- FPS Data
- SPS Data



## FSP DATA

Fill all the required fields and choose the required file to upload in the “Upload FSP Data” page. Then press “**Upload File**” button to finalize the uploading the file process and press “**Upload FSP Data**” to upload the FSP Data.

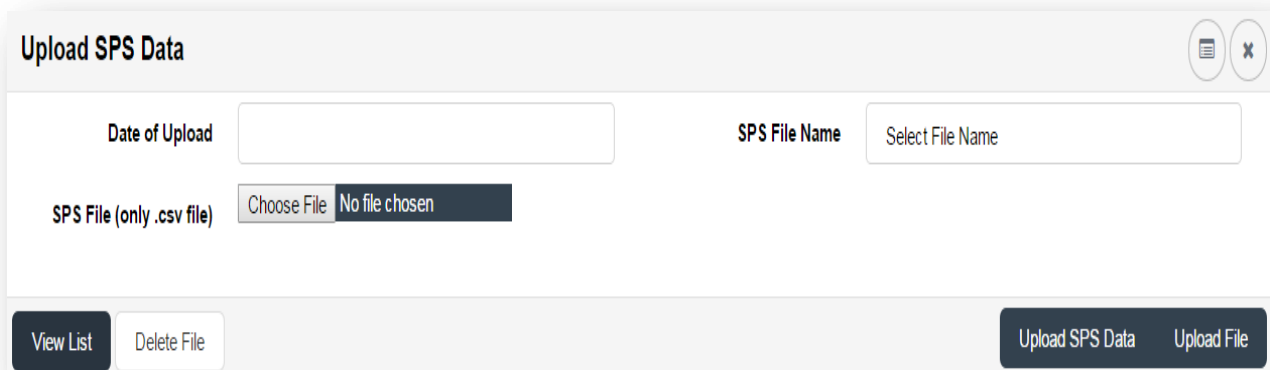


The screenshot shows a web form titled "Upload FSP Data". It features a header bar with a list icon and a close button. The form contains the following fields and buttons:

- Date of Upload:** A text input field.
- FSP File Name:** A text input field with the placeholder text "Select File Name".
- FSP File (only .csv file):** A file selection area with a "Choose File" button and a "No file chosen" label.
- Bottom Bar:** Contains four buttons: "View List", "Delete File", "Upload FSP Data", and "Upload File".

## SPS DATA

Fill all the required fields and choose the required file to upload in the “Upload SPS Data” page. Then press “**Upload File**” button to finalize the uploading the file process and press “**Upload SPS Data**” to upload the SPS Data.



The screenshot shows a web form titled "Upload SPS Data". It features a header bar with a list icon and a close button. The form contains the following fields and buttons:

- Date of Upload:** A text input field.
- SPS File Name:** A text input field with the placeholder text "Select File Name".
- SPS File (only .csv file):** A file selection area with a "Choose File" button and a "No file chosen" label.
- Bottom Bar:** Contains four buttons: "View List", "Delete File", "Upload SPS Data", and "Upload File".

## 7) Reports

There are sixteen sub-categories modules in Reports as follows:



## Project Wise Child

Fill all the required fields in the “Project Wise Child” page and then press “**Search**” button to view the details of specified child. This tab is used to view the project wise child list.

### Project Wise Child

Project Name: All Project  
FR-BANGALORE

Additional Info: Sponsorship All Stay All

Date of Admit: From To

Date of Birth: From To

Child Info: Child Type Without Departur Gender All

Search

## Child Availability

Fill all the required fields in the “Project Wise Child Sponsorship Availability” page and then press “**Search**” button to view the details of specified project wise child. This tab is used to view the project wise child sponsorship availability list.

### Project wise Child Sponsorship Availability

Project Name: All Project  
FR-BANGALORE

Additional Info: Sponsorship All Stay All

Date of Admit: From To

Date of Birth: From To

Child Info: Child Type Without Departur Gender All

Sponsorship: No of Sponsor All Child Age All

Search

# Consolidated Child Availability

Fill all the required fields in the “Consolidated Child Sponsorship Availability” page and then press “**Search**” button to view the details of specified child. This tab is used to view the consolidated child sponsorship availability list.

The screenshot shows a web form titled "Consolidated Child Sponsorship Availability". It features several input fields: a "Project Name" dropdown menu with "All Project" and "FR-BANGALORE" options; "Date of Admit" and "Date of Birth" fields, each with "From" and "To" sub-fields; a "Child Info" section with tabs for "Child Type", "Without Departun", "Gender", and "All"; and a "No of Sponsor" dropdown menu with "All" selected. A green "Search" button is located at the bottom right.

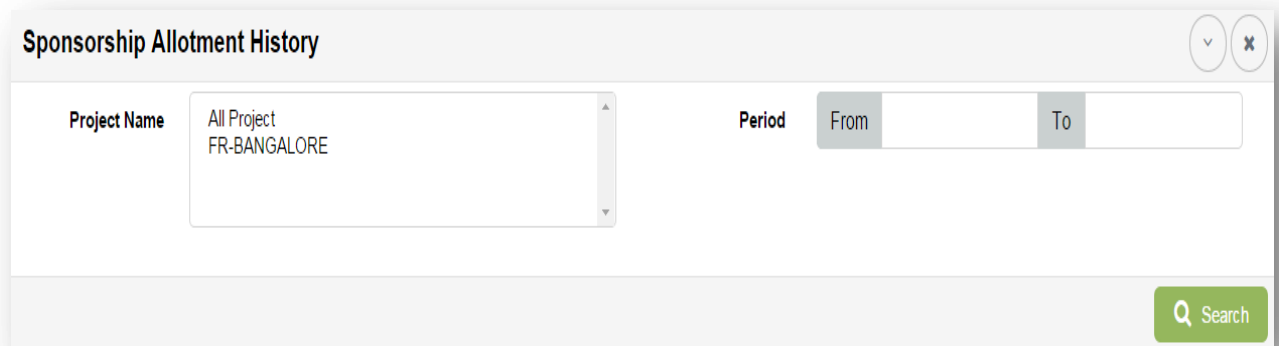
# Donor Service MS

Fill all the required fields in the “Donor Service MIS” page and then press “**Search**” button to view the details of specified record. This tab is used to view the Donor Service Management Information System list.

The screenshot shows a web form titled "Donor Service MIS". It features a "Project Name" dropdown menu with "All Project" and "FR-BANGALORE" options. The "Period" section includes "Month" and "Year" dropdowns, with "All Months" and "2015" selected. A green "Search" button is located at the bottom right.

## Child Allotment History

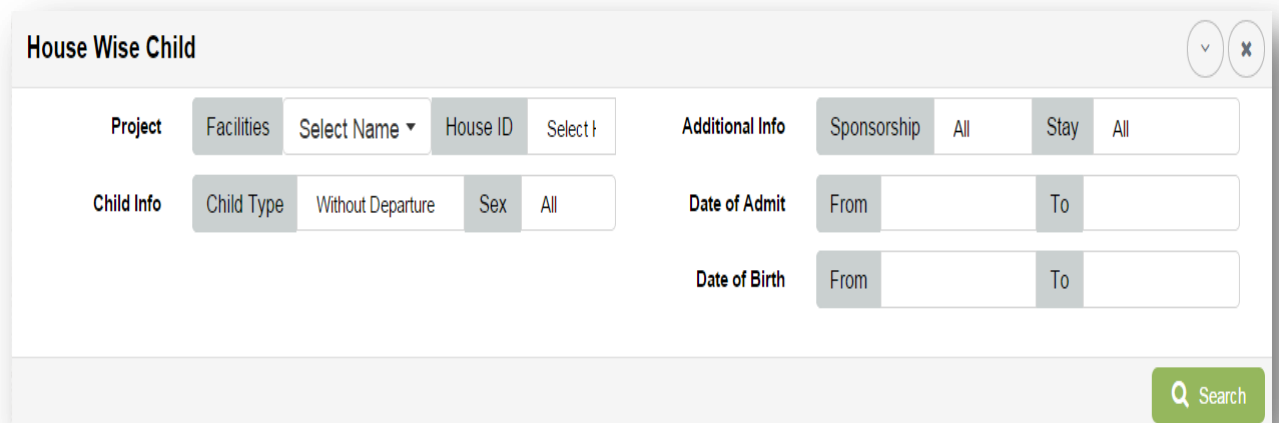
Fill all the required fields in the “Sponsorship Allotment History” page and then press “**Search**” button to view the details of specified sponsorship allotment history record. This tab is used to view the sponsorship allotment list.



The screenshot shows a web form titled "Sponsorship Allotment History". It features a dropdown menu for "Project Name" with the selected option "All Project" and a sub-option "FR-BANGALORE" visible. To the right, there is a "Period" section with "From" and "To" date input fields. A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

## House Wise Child

Fill all the required fields in the “House Wise Child” page and then press “**Search**” button to view the details of specified House wise child record. This tab is used to view the house wise child list.



The screenshot shows a web form titled "House Wise Child". It contains several search criteria sections: "Project" with "Facilities" and "Select Name" dropdowns, and "House ID" with a "Select" dropdown; "Additional Info" with "Sponsorship" and "Stay" dropdowns, and "All" text inputs; "Child Info" with "Child Type" and "Without Departure" dropdowns, and "Sex" and "All" text inputs; "Date of Admit" with "From" and "To" date input fields; and "Date of Birth" with "From" and "To" date input fields. A green "Search" button with a magnifying glass icon is located at the bottom right of the form.



## House Wise Progress

Fill all the required fields in the “House Wise Child Progress” page and then press “**Search**” button to view the details of specified house wise child. This tab is used to view House Wise Child Progress list.

The screenshot shows a search interface for 'House Wise Child Progress'. At the top, the title 'House Wise Child Progress' is displayed with a dropdown arrow and a close button. Below the title, there are two main sections: 'Project' and 'Child Info'. The 'Project' section includes a 'Facilities' dropdown menu with 'Select Name' and a 'House ID' dropdown menu with 'Select'. The 'Child Info' section includes a 'Child Type' dropdown menu with 'Without Departun' and 'Gender' dropdown menu with 'All'. A green 'Search' button with a magnifying glass icon is located at the bottom right.

## Child with Sponsor

Fill all the required fields in the “Child with Sponsor” page and then press “**Search**” button to view the details of specified child wise sponsor record. This tab is used to view the Child with Sponsor list.

The screenshot shows a search interface for 'Child with Sponsor'. At the top, the title 'Child with Sponsor' is displayed with a dropdown arrow and a close button. Below the title, there are several search criteria: 'Project Name' with a dropdown menu showing 'All Project' and 'FR-BANGALORE'; 'Additional Info' with 'Sponsorship' dropdown menu showing 'All' and 'Stay' dropdown menu showing 'All'; 'Date of Admit' with 'From' and 'To' date pickers; 'Date of Birth' with 'From' and 'To' date pickers; 'Date of Depart' with 'From' and 'To' date pickers; 'Child Info' with 'Child Type' dropdown menu showing 'Without Departun' and 'Gender' dropdown menu showing 'All'; and 'Sponsorship' with a dropdown menu showing 'All'. A green 'Search' button with a magnifying glass icon is located at the bottom right.

## Child without Sponsor

Fill all the required fields in the “Child without Sponsor” page and then press “**Search**” button to view the details of specified child without sponsor record. This tab is used to view the Child without Sponsor list.

The screenshot shows a search form titled "Child without Sponsor". It features several input fields and filters:

- Project Name:** A dropdown menu with "All Project" and "FR-BANGALORE" selected.
- Additional Info:** A filter section with "Sponsorship" selected, and "All" and "Stay" options.
- Date of Admit:** Two input fields labeled "From" and "To".
- Date of Birth:** Two input fields labeled "From" and "To".
- Child Info:** A filter section with "Child Type" selected, and "Without Departur", "Gender", and "All" options.
- Search:** A green button with a magnifying glass icon and the text "Search".

## Sponsor with Children

Fill all the required fields in the “Sponsor with Child” page and then press “**Search**” button to view the details of specified Sponsor with Child record. This tab is used to view the Sponsor with Child list.

The screenshot shows a search form titled "Sponsor with Children". It features several input fields and filters:

- Project Name:** A dropdown menu with "All Project" and "FR-BANGALORE" selected.
- Campaign Code:** A dropdown menu with "All Campaign", "HD151130TX", "MD152130N1", "TD153120TY", and "DD154130PM" listed.
- Location Info:** Two dropdown menus for "Country" (set to "All") and "State" (set to "All").
- City Name:** A dropdown menu set to "All".
- Joining:** Two input fields labeled "From" and "To".
- Donor ID:** An empty input field.
- Add. Criteria 1:** A filter section with "Vertical" selected, and "All" and "Channel" options.
- Add. Criteria 2:** A filter section with "Product" selected, and "All" and "Donor Type" options.
- Purpose:** A dropdown menu with "All Purpose", "EDUCATION", "GENERAL DONATION", "HEALTH", and "HUMANITARIAN AND DRP" listed.
- Search:** A green button with a magnifying glass icon and the text "Search".

## Sponsor without Children

Fill all the required fields in the “Sponsor without Child” page and then press “**Search**” button to view the details of specified Sponsor without Child record. This tab is used to view the Sponsor without Child list.

The screenshot shows a search interface titled "Sponsor without Children". It features several filter sections: "Project Name" with a dropdown menu showing "All Project" and "FR-BANGALORE"; "Location Info" with "Country" and "State" dropdowns both set to "All"; "City Name" with a dropdown set to "All"; "Joining" with "From" and "To" input fields; "Donor ID" with an empty text field; "Campaign Code" with a dropdown menu listing "All Campaign", "HD151130TX", "MD152130N1", "TD153120TY", and "DD152130DM"; "Add. Criteria 1" with "Vertical" and "Channel" dropdowns both set to "All"; "Add. Criteria 2" with "Product" and "Donor Type" dropdowns both set to "All"; and "Purpose" with a dropdown menu listing "All Purpose", "EDUCATION", "GENERAL DONATION", "HEALTH", and "HUMANITARIAN AND DDD". A green "Search" button is located at the bottom right.

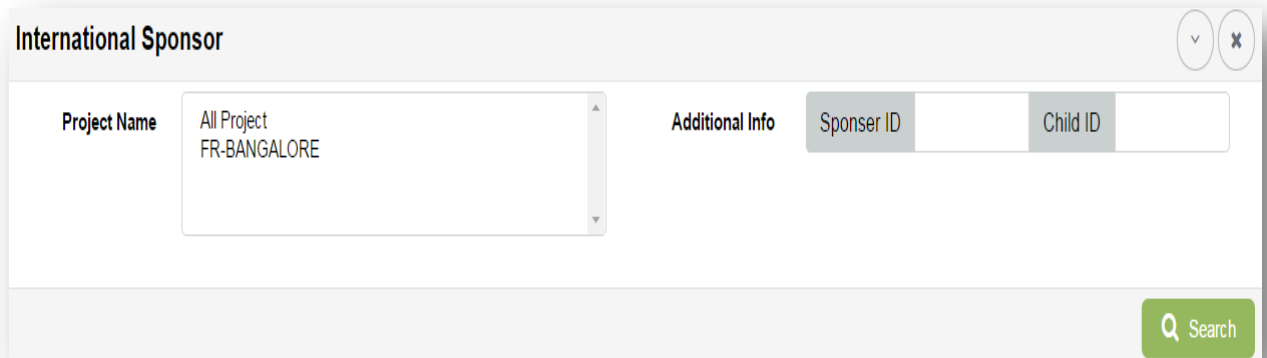
## Sponsor List (in Ms-Excel)

Fill all the required fields in the “Sponsor List” page and then press “**Search**” button to view the details of specified Sponsor list. This tab is used to view the Sponsor list in Ms-Excel.

The screenshot shows a search interface titled "Sponsor List". It features several filter sections: "Project Name" with a dropdown menu showing "All Project" and "FR-BANGALORE"; "Location Info" with "Country" and "State" dropdowns both set to "All"; "City Name" with a dropdown set to "All"; "Joining" with "From" and "To" input fields; "Generate As" with a dropdown set to "With Child"; "Campaign Code" with a dropdown menu listing "All Campaign", "HD151130TX", "MD152130N1", "TD153120TY", and "DD152130DM"; "Add. Criteria 1" with "Vertical" and "Channel" dropdowns both set to "All"; "Add. Criteria 2" with "Product" and "Donor Type" dropdowns both set to "All"; and "Purpose" with a dropdown menu listing "All Purpose", "EDUCATION", "GENERAL DONATION", "HEALTH", and "HUMANITARIAN AND DDD". A green "Search" button is located at the bottom right.

## International Sponsor List

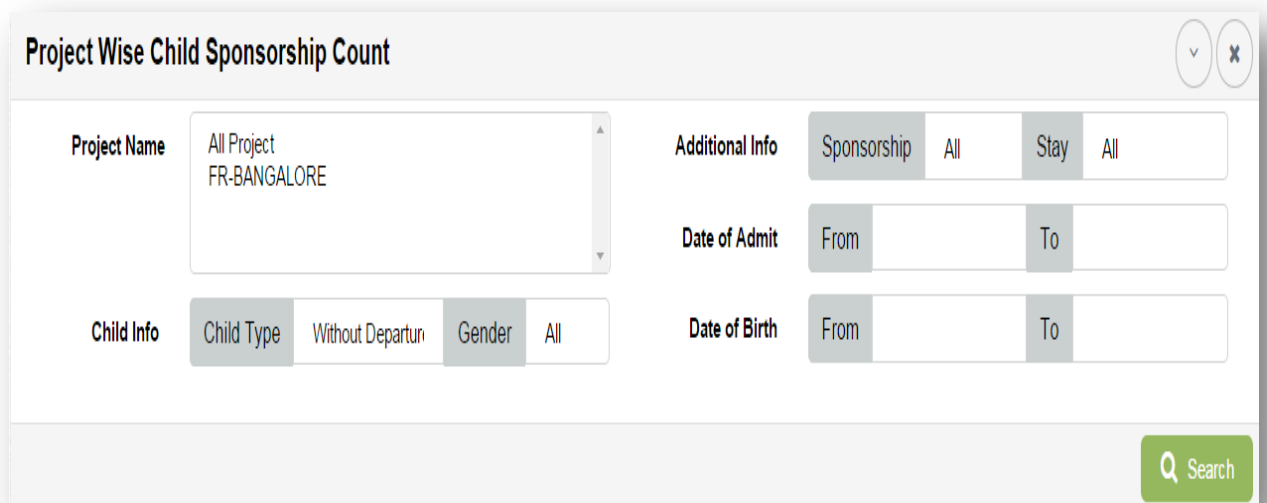
Fill all the required fields in the “International Sponsor” page and then press “**Search**” button to view the details of specified International Sponsor record. This tab is used to view the International Sponsor list.



The screenshot shows a search form titled "International Sponsor". It features a "Project Name" dropdown menu with "All Project" and "FR-BANGALORE" as options. To the right, under "Additional Info", there are two input fields: "Sponsor ID" and "Child ID". A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

## Sponsorship Count

Fill all the required fields in the “Project Wise Child Sponsorship Count” page and then press “**Search**” button to view the details of specified Project wise sponsorship count record. This tab is used to view the Project wise Child sponsorship count list.



The screenshot shows a search form titled "Project Wise Child Sponsorship Count". It features a "Project Name" dropdown menu with "All Project" and "FR-BANGALORE" as options. Below it, there is a "Child Info" section with three input fields: "Child Type" (with "Without Departur" as a suggestion), "Gender", and "All". To the right, under "Additional Info", there are two rows of input fields. The first row has "Sponsorship" (with "All" as a suggestion) and "Stay" (with "All" as a suggestion). The second row has "Date of Admit" with "From" and "To" input fields. The third row has "Date of Birth" with "From" and "To" input fields. A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

## Corporate Sponsor List

Fill all the required fields in the “Corporate Sponsor” page and then press “**Search**” button to view the details of Corporate Sponsor record. This tab is used to view the Corporate Sponsor list.

The screenshot shows a search form titled "Corporate Sponsor" with the following fields and options:

- Project Name:** A dropdown menu with "All Project" and "FR-BANGALORE" as options.
- Location Info:** Includes "Country" and "State" dropdowns, both currently set to "All".
- City Name:** A dropdown menu set to "All".
- Joining:** Two input fields labeled "From" and "To".
- Donor ID:** A text input field.
- Campaign Code:** A dropdown menu with options: "All Campaign", "HD151130TX", "MD152130N1", "TD153120TY", and "DD153120TY".
- Add. Criteria 1:** Includes "Vertical" and "Channel" dropdowns, both set to "All".
- Add. Criteria 2:** Includes "Product" and "Donor Type" dropdowns, both set to "All".
- Purpose:** A dropdown menu with options: "All Purpose", "EDUCATION", "GENERAL DONATION", "HEALTH", and "HUMANITARIAN AND ODD".

A green "Search" button is located at the bottom right of the form.

## Departure Child List

Fill all the required fields in the “Departure Children” page and then press “**Search**” button to view the details of Departure Child record. This tab is used to view the Departure Child list.

The screenshot shows a search form titled "Departure Children" with the following fields and options:

- Project Name:** A dropdown menu with "All Project" and "FR-BANGALORE" as options.
- Child Info:** Includes "Child Type" and "Gender" dropdowns. "Child Type" is set to "Only Departure" and "Gender" is set to "All".
- Additional Info:** Includes "Sponsorship" and "Stay" dropdowns, both set to "All".
- Date of Admit:** Two input fields labeled "From" and "To".
- Date of Birth:** Two input fields labeled "From" and "To".

A green "Search" button is located at the bottom right of the form.

## 8) Facility Reports



### Activity List

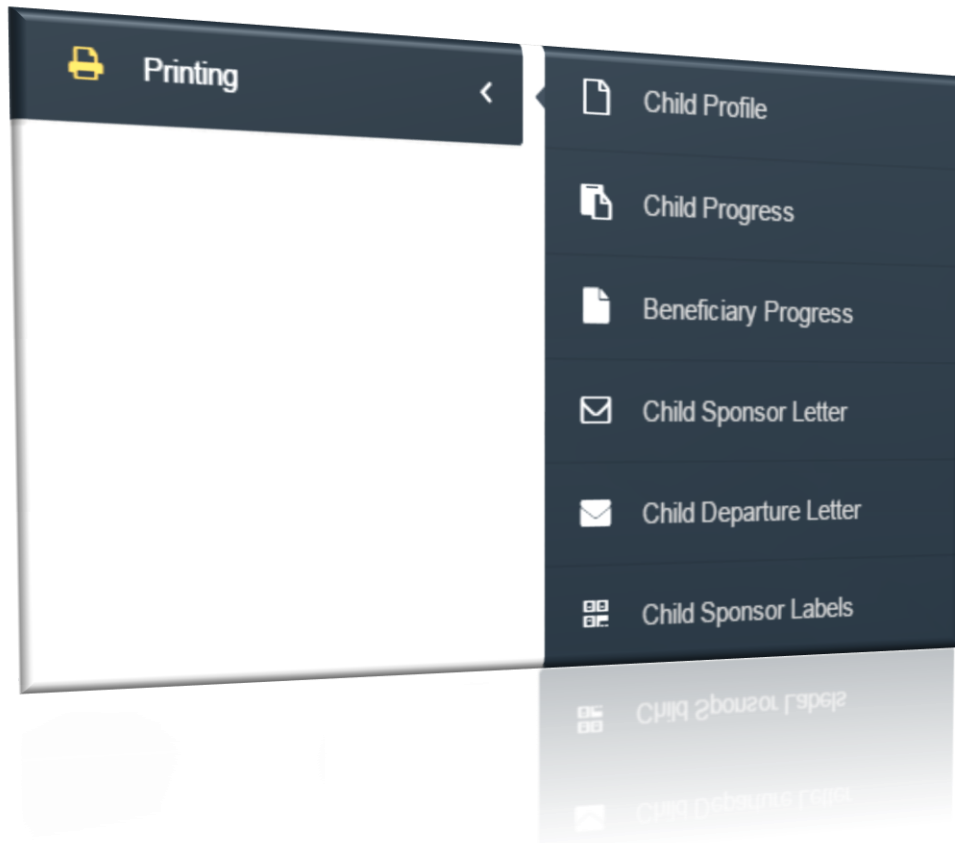
Fill all the required fields in the “Activity” page and then press “**Search**” button to view the details of Activity record. This tab is used to view the Activity list.

A screenshot of a mobile application form titled 'Activity'. The form has a light gray header with the title 'Activity' and two circular icons on the right: a downward arrow and an 'x'. Below the header, there are three input fields: 'Project Name' with a dropdown menu showing 'All Project', 'Period' with 'From' and 'To' sub-fields, and 'Activity Title' with a text input field. At the bottom right, there is a green button with a magnifying glass icon and the text 'Search'.

## 9) Printing

There are six sub-categories modules in Reports as follows:

- Child Profile
- Child Progress
- Beneficiary Progress
- Child Sponsor Letter
- Child Departure Letter
- Child Sponsor Labels



## Child Profile

Fill all the required fields in the “Child Profile” page and then press “**Search**” button to view the details of Child Profile record.

### Child Profile

<b>Project Name</b>	<input type="text" value="All Project FR-BANGALORE"/>	<b>Additional Info</b>	<input type="text" value="Sponsorship All Stay All"/>
<b>Child Info</b>	<input type="text" value="Child Type Without Departur Gender All"/>	<b>Date of Admit</b>	<input type="text" value="From To"/>
<b>Child Name</b>	<input type="text" value="All Children"/>	<b>Date of Birth</b>	<input type="text" value="From To"/>
		<b>Child ID</b>	<input type="text"/>

# Child Progress

Fill all the required fields in the “Child Progress” page and then press “**Search**” button to view the details of Child Progress record.

The screenshot shows a web form titled "Child Progress" with a search bar and a close button in the top right. The form is organized into two columns. The left column contains: "Project Name" (dropdown menu with "All Project" and "FR-BANGALORE" options), "Child Info" (tabbed interface with "Child Type", "Without Departun", "Gender", and "All" tabs), "Child Name" (dropdown menu with "All Children" option), and "Child ID" (text input field). The right column contains: "Additional Info" (tabbed interface with "Sponsorship", "All", "Stay", and "All" tabs), "Date of Admit" (date range selector with "From" and "To" fields), "Date of Birth" (date range selector with "From" and "To" fields), "Progress" (date range selector with "From" and "To" fields), and "Period" (text input field). A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

# Beneficiary Progress

Fill all the required fields in the “Beneficiary Progress” page and then press “**Search**” button to view the details of Beneficiary Progress record.

The screenshot shows a web form titled "Beneficiary Progress" with a search bar and a close button in the top right. The form is organized into two columns. The left column contains: "Project Name" (dropdown menu with "All Project" and "FR-BANGALORE" options), "Beneficiary Info" (tabbed interface with "Type", "Without Departure", "Gender", and "All" tabs), and "Beneficiary Name" (dropdown menu with "All Beneficiary" option). The right column contains: "Date of Admit" (date range selector with "From" and "To" fields), "Date of Birth" (date range selector with "From" and "To" fields), "Progress" (date range selector with "From" and "To" fields), "Period" (text input field), and "Beneficiary ID" (text input field). A green "Search" button with a magnifying glass icon is located at the bottom right of the form.



# Child Sponsor Letter

Fill all the required fields in the “Child Sponsorship Letter” page and then press “**Search**” button to view the details of Child Sponsorship Letter.

### Child Sponsorship Letter

**Project Name** All Project FR-BANGALORE

**Child Info** Child Type Without Departun Gender All

**Child Name** All Children

**Child ID**

**Shorted By** Child wise

**Additional Info** Sponsorship All Stay All

**Date of Admit** From To

**Date of Birth** From To

**Alloted Period** From To

**Donor ID**

Search

# Child Departure Letter

Fill all the required fields in the “Child Departure Letter” page and then press “**Search**” button to view the details of Child Departure Letter.

### Child Departure Letter

**Project Name** All Project FR-BANGALORE

**Child Info** Child Type Without Departun Gender All

**Child Name** All Children

**Child ID**

**Additional Info** Sponsorship All Stay All

**Departure** From To

**Period**

**Date of Birth** From To

**Donor ID**

Search

# Child Sponsor Labels

Fill all the required fields in the “Sponsorship Labels” page and then press “**Search**” button to view the details of Child Sponsor Labels.

### Sponsorship Labels

<b>Project Name</b>	All Project FR-AHEMDABAD FR-BANGALORE FR-DELHI HO FR-DELHI 1	<b>Campaign Code</b>	All Campaign HD151130TX MD152130N1 TD153120TY DD153120TY
<b>Location Info</b>	Country All State All	<b>Add. Criteria 1</b>	Vertical All Channel All Channel
<b>City Name</b>	All	<b>Add. Criteria 2</b>	Product All Donor Type All
<b>Joining</b>	From To	<b>Purpose</b>	All Purpose EDUCATION GENERAL DONATION HEALTH HUMANITARIAN AND...
<b>Donor ID</b>			
<b>Donor Status</b>	Paying		

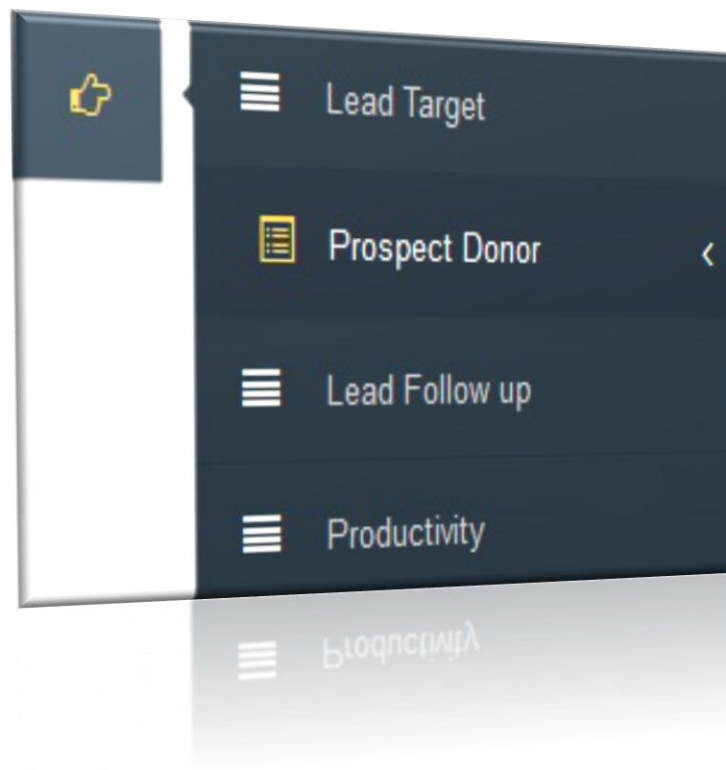
Search

## LEADS(IP & CP)

Leads (Individual Partner & Corporate Partner)  
There are four sub-categories modules in Leads:

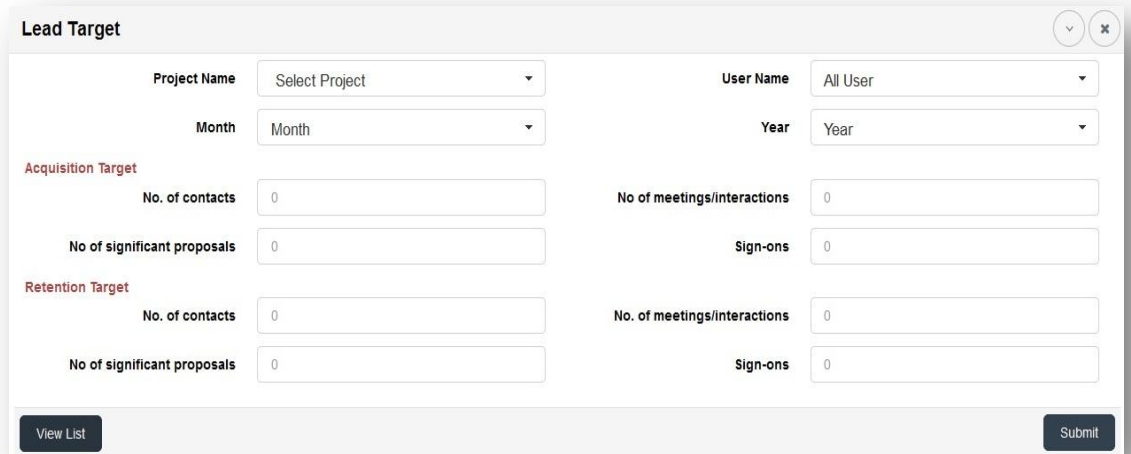
- Lead Target
- Prospect Donor
- Lead Follow up
- Productivity

As shown below.



## 1) Lead Target

Fill all the required details in the “Lead Target” page and then press the “Submit” button to finalize the submission process of the required data.

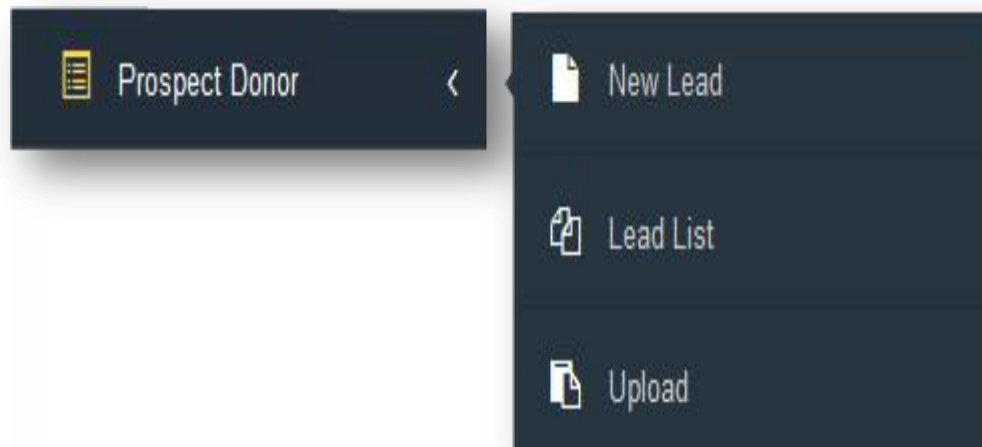


The screenshot shows a web form titled "Lead Target" with a close button in the top right corner. The form is organized into several sections:

- Project Name:** A dropdown menu with "Select Project" as the current selection.
- User Name:** A dropdown menu with "All User" as the current selection.
- Month:** A dropdown menu with "Month" as the current selection.
- Year:** A dropdown menu with "Year" as the current selection.
- Acquisition Target:** A section containing three input fields:
  - No. of contacts: 0
  - No of significant proposals: 0
  - No of meetings/interactions: 0
- Retention Target:** A section containing three input fields:
  - No. of contacts: 0
  - No of significant proposals: 0
  - No. of meetings/interactions: 0
- Sign-ons:** An input field with the value 0.

At the bottom left, there is a "View List" button, and at the bottom right, there is a "Submit" button.

## 2) Prospect Donor



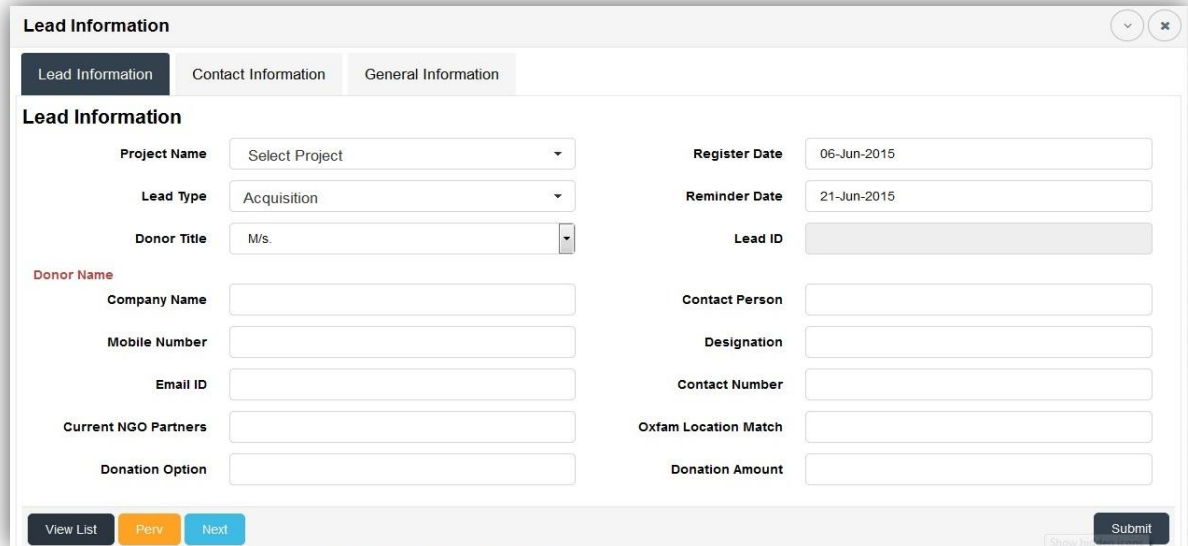
Prospect Donor includes three sub-categories modules:

- New Lead
- Lead List
- Upload

## NEW Lead

Press “**New Lead**” option from the drop menu, this will redirects you to “**Lead Information**” Page.

Fill all the fields in the Lead information page, after filling press “**Next**” button to pursue to Contact Information page.

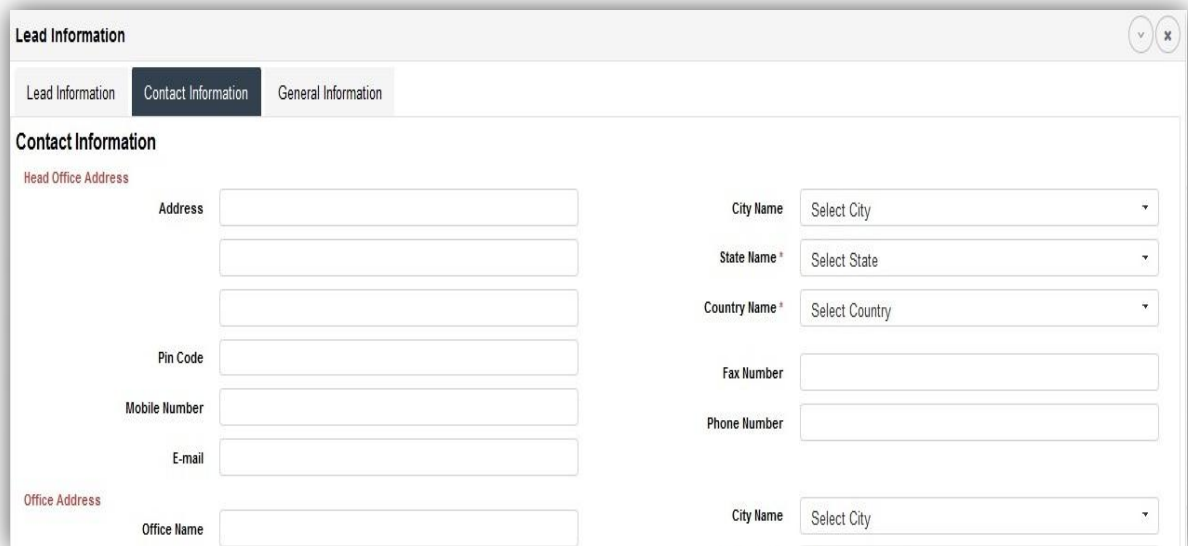


The screenshot shows a web form titled "Lead Information" with three tabs: "Lead Information", "Contact Information", and "General Information". The "Lead Information" tab is active. The form contains the following fields:

- Project Name: Select Project (dropdown)
- Lead Type: Acquisition (dropdown)
- Donor Title: M/s. (dropdown)
- Register Date: 06-Jun-2015
- Reminder Date: 21-Jun-2015
- Lead ID: (empty field)
- Donor Name: (empty field)
- Company Name: (empty field)
- Contact Person: (empty field)
- Mobile Number: (empty field)
- Designation: (empty field)
- Email ID: (empty field)
- Contact Number: (empty field)
- Current NGO Partners: (empty field)
- Oxfam Location Match: (empty field)
- Donation Option: (empty field)
- Donation Amount: (empty field)

At the bottom, there are buttons for "View List", "Prev", "Next", and "Submit".

Fill all the fields in the Contact information page, after filling press “**Next**” button to pursue to General Information page.



The screenshot shows the "Contact Information" tab of the "Lead Information" form. The form contains the following fields:

- Head Office Address: (empty field)
- Address: (empty field)
- City Name: Select City (dropdown)
- State Name: Select State (dropdown)
- Pin Code: (empty field)
- Country Name: Select Country (dropdown)
- Mobile Number: (empty field)
- Fax Number: (empty field)
- E-mail: (empty field)
- Phone Number: (empty field)
- Office Address: (empty field)
- Office Name: (empty field)
- City Name: Select City (dropdown)

Fill all the fields in the General information page, after filling press “**Submit**” button to finalize the process and save it.

The screenshot shows a web application window titled "Lead Information" with three tabs: "Lead Information", "Contact Information", and "General Information". The "General Information" tab is active. The form contains the following fields:

- Industry Sector: Select (dropdown)
- Company Chairman: Text input
- Head Office Address: Text input
- No. of Branches: Text input
- CSR Thematic Area: Text input
- Volunteering Details: Text input
- Next Step: Text input
- Company Chief: Text input
- Executive: Text input
- Branch Office Address: Text input
- No. of Employees: Text input
- CSR Spend Range: Text input
- Visit Details: Text input
- Remark: Text input

At the bottom, there are navigation buttons: "View List", "Prev", "Next", and "Submit".

## LEAD LIST

Press **“Lead List”** option from the drop menu, this will redirects you to **“Lead Search”** Page.

The screenshot shows a web application window titled "Lead Search". At the top right, there are buttons for "Search" and "Export Data". The form contains the following fields:

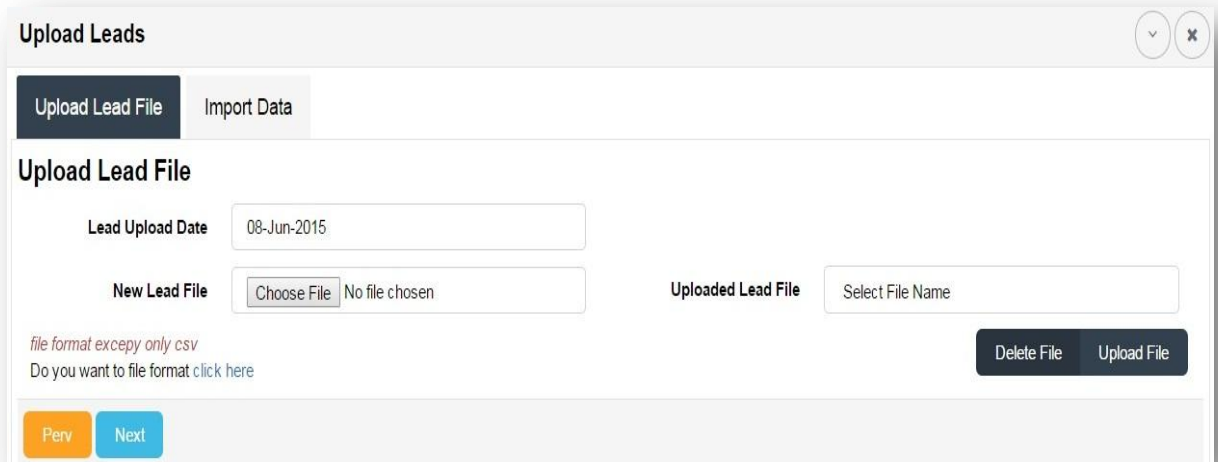
- Donor Title: M/s. (dropdown)
- Lead ID: Text input
- Mobile No: Text input
- Lead Name:
  - First: Text input
  - Last: Text input
- Company: Text input
- Contact: Text input
- Name: Text input
- Person: Text input
- Address 1: Text input
- Address 2: Text input
- Country: Select Country (dropdown)
- State: Select State (dropdown)
- Project: All Project (dropdown)
- City: Select State (dropdown)
- Email ID: Text input
- Phone No: Text input
- Reminder Date: Text input
- Entry Period:
  - From Date: Text input
  - To Date: Text input

A "Search" button is located at the bottom right of the form.

Fill all the fields in the **“Lead Search”** page for finding the required lead, after filling all fields press **“Search”** button. The specified Lead will show up, then the information of the Lead can be downloaded in the required format.

# UPLOAD LEADS

Press **“Upload”** option from the drop menu, this will redirects you to **“Upload Leads”** Page.



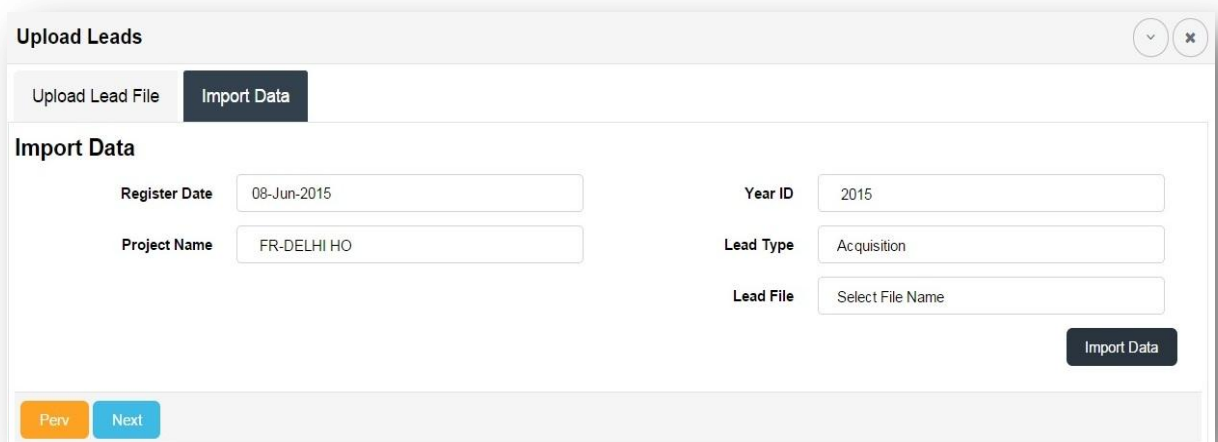
The screenshot shows a window titled "Upload Leads" with two tabs: "Upload Lead File" (active) and "Import Data". The "Upload Lead File" tab contains the following fields and buttons:

- Lead Upload Date:** 08-Jun-2015
- New Lead File:** Choose File (button), No file chosen (text)
- Uploaded Lead File:** Select File Name (text)
- Buttons:** Delete File, Upload File
- Text:** file format except only csv, Do you want to file format click here
- Navigation:** Prev, Next

There will be two tabs **“Upload Lead File”** & **“Import data”**.

In **“Upload Lead File”** option, enter the date, choose file that needs to upload and then select file name that needs to be deleted.

Then delete that existed file and upload new file.



The screenshot shows the same "Upload Leads" window, but with the "Import Data" tab selected. The "Import Data" tab contains the following fields and buttons:

- Register Date:** 08-Jun-2015
- Project Name:** FR-DELHI HO
- Year ID:** 2015
- Lead Type:** Acquisition
- Lead File:** Select File Name (text)
- Button:** Import Data
- Navigation:** Prev, Next

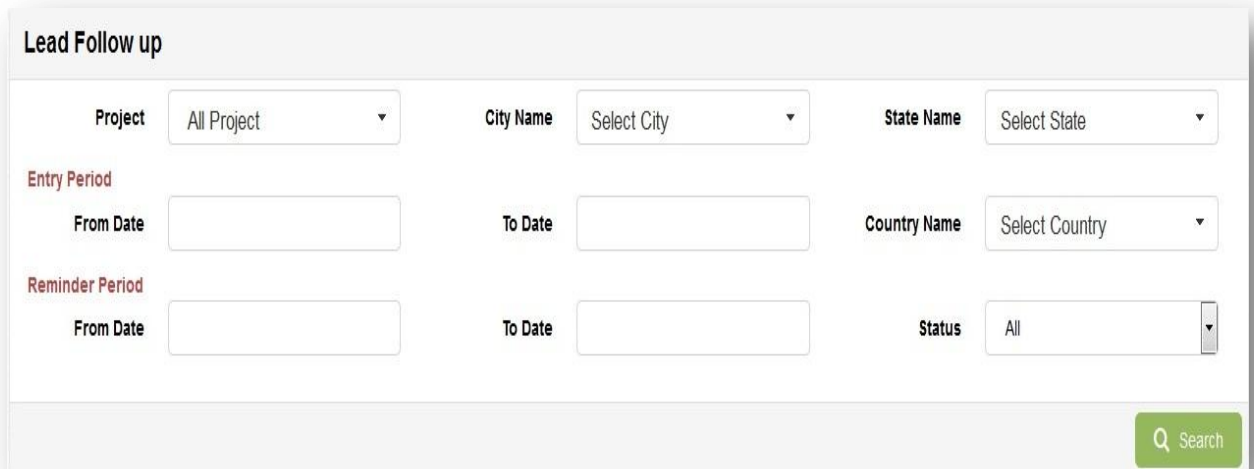
In **“Import data”** option, select register date, project name, Year Id, Lead type and File.

Then press **“Import data”** button.

### 3) Lead Follow up

Fill all the fields in the “**Lead Follow up**” page for finding the required lead, after filling all fields press “**Search**” button.

The specified Lead will show up, then the information of the Lead can be downloaded in the required format.

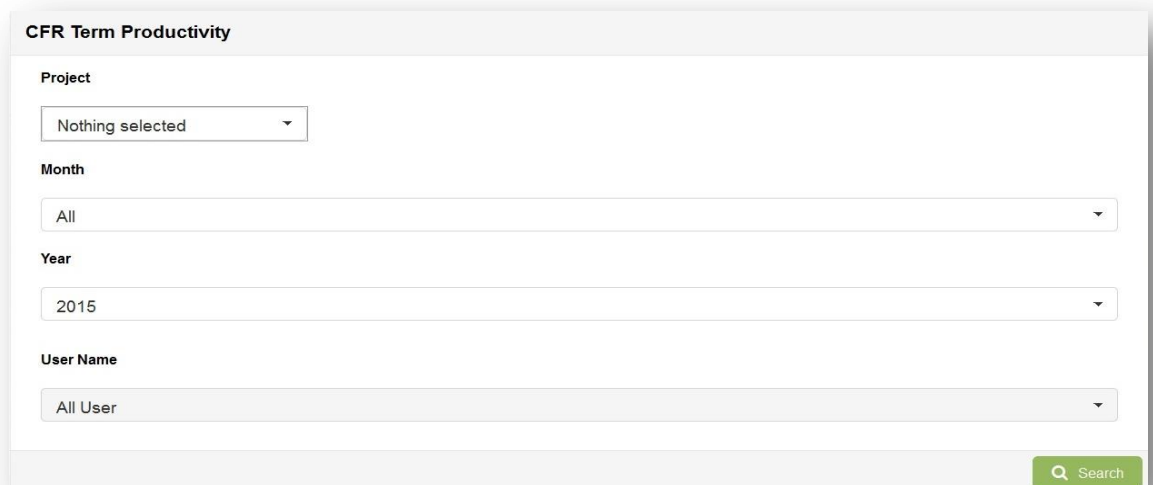


The screenshot shows a search form titled "Lead Follow up". It contains several input fields and dropdown menus arranged in a grid. The fields are: "Project" (dropdown with "All Project" selected), "City Name" (dropdown with "Select City" selected), "State Name" (dropdown with "Select State" selected), "Entry Period" (sub-section with "From Date" and "To Date" text boxes), "Country Name" (dropdown with "Select Country" selected), "Reminder Period" (sub-section with "From Date" and "To Date" text boxes), and "Status" (dropdown with "All" selected). A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

### 4) Productivity

Fill all the required fields in the “**CFR Term Productivity**” page, after filling all fields press “**Search**” button.

The specified record will show up, then the information of the Lead can be downloaded in the required format.



The screenshot shows a search form titled "CFR Term Productivity". It contains several dropdown menus and text boxes arranged vertically. The fields are: "Project" (dropdown with "Nothing selected" selected), "Month" (dropdown with "All" selected), "Year" (dropdown with "2015" selected), "User Name" (dropdown with "All User" selected), and a "Search" button with a magnifying glass icon at the bottom right.



## MANAGE DONOR

Different utilities of donor can be managed through “**Manage donor**” option.

There are four modules in the Manage Donor option :

- Profile
- Group Assign
- Trouble Ticket
- Reports



## 1) Donor Profile

When an Individual/Organization makes a donation, so the details of the donor saved for further processing as records.

Donor Profile

Search Export Data

Donor Ref. ID Mobile No.

ECS & Cr/Card ECS ID Cr/Card ID

Donor Name

Address

Add. Criteria1 PAN No. Form No.

Account No. (For ECS)

Add. Criteria2 Operation All Operation Type All Type

Joining Period From To

Location Country All State All

Add. Criteria3 City All Product All

Add. Criteria4 Email ID Phone No.

Search

- After pressing “**Profile**” button, the new page “**Donor Profile**” appears (shown above).
- In the following page fill all the required fields and then press the button “**Search**”. It will search specified donor profile available.

Donor Profile

Search Export Data

DonorID	Name	Operation	Product	Address	Location	Last Cont.	Status	Reminder	View	Receipt	Edit
NCO/23	TIRLOCHAN ANAND Mobile No. :1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	4,000.00 16.11.2006	NON-PAYING <a href="#">Click for reasons</a>				

After searching the specified record that data can be converted and saved into different file formats by pressing “**Export Data**” button.

“**Print reminder letter**”, “**Issue new receipt**”, “**View contribution details**”, and “**Edit donor’s profile**” these functions can also performed through donor profile record.

## 2) Group Assign

Press “**Group Assign**” option to view the group in which a donor assigned and to assign the donor to a particular group.

### Donor Profile

Donor Ref.	ID	Mobile No.	Add. Criteria2	Operation	All Operation	Type	All Type	
ECS & Cr/Card	ECS ID	Cr/Card ID	Joining Period	From	To			
Donor Name				Location	Country	All	State	All
Address				Add. Criteria3	City	All	Product	All
Add. Criteria1	PAN No.	Form No.	Add. Criteria4	Email ID	Phone No.			

DonorID	Name	Operation	Product	Address	Location	View Group	Add To Group
NCO/23	TIRLOCHAN ANAND Mobile No. :1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	<input type="button" value="Search"/>	<input type="button" value="Add To Group"/>



Click this button to display the assigned group of donor.

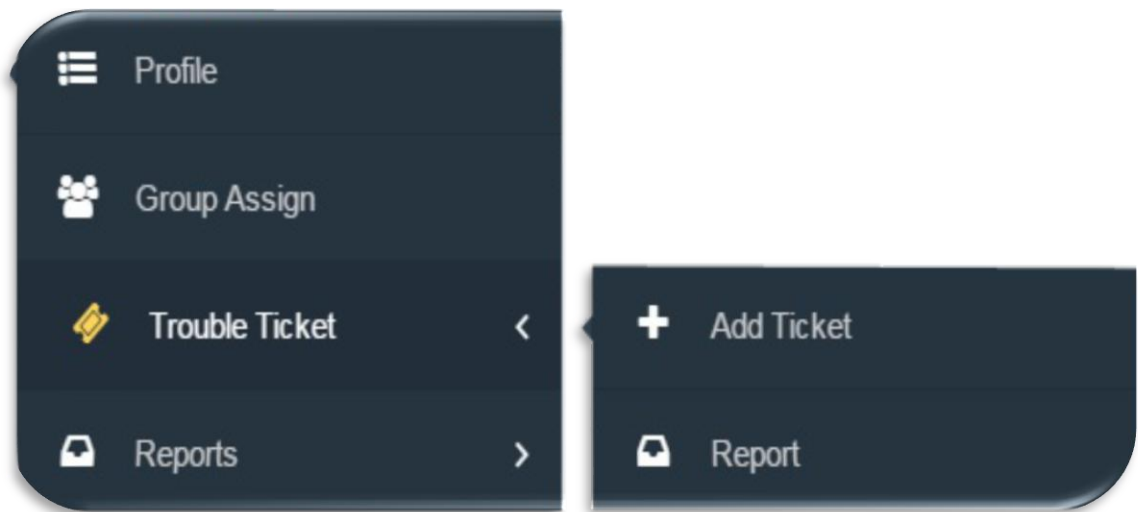


Click this button to assigned the group to new donor.

### 3) Trouble Ticket

Any trouble or complain that donor have during their process of donation or during the transaction process.

Than that complain conversion information will be stored as Trouble Ticket.



Trouble Ticket has two sub-categories:

- Add Ticket
- Report

# ADD TICKET

### Donor Search

[Search](#) [Export Data](#)

Donor Title	<input type="text" value="Select Title"/>	Donor ID	<input type="text" value="NCO/23"/>	Mobile No	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>	Last	<input type="text"/>
Address 1	<input type="text"/>	Address 2	<input type="text"/>	Operation	<input type="text" value="All Operation"/>
Country	<input type="text" value="Select Country"/>	State	<input type="text" value="Select State"/>	City	<input type="text" value="Select State"/>
ECS ID	<input type="text"/>	Credit Card ID	<input type="text"/>	Phone No	<input type="text"/>
Vertical	<input type="text" value="All Vertical"/>	Donor Type	<input type="text" value="All type"/>	Product	<input type="text" value="All product"/>
Email ID	<input type="text"/>	Joining Date (F)	<input type="text"/>	Joining Date (T)	<input type="text"/>
Form No	<input type="text"/>	PAN Number	<input type="text"/>		

[Search](#)

Show  entries

Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Last Cont.	Status	View Ticket	Trouble Ticket
1.	NCO/23	TIRLOCHAN ANAND Mobile No.:1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	4,000.00 16-Nov-2006	NON-PAYING <small>Click for reasons</small>		

Showing 1 to 1 of 1 entries

[Previous](#) **1** [Next](#)

By clicking **“Add Ticket”** option, it redirects you to page (shown above).

Enter the details of the donor that has any issue, then click on the **“Search”** button to initiate donor search.


Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Last Cont.	Status	View Ticket	Trouble Ticket
1.	NCO/23	TIRLOCHAN ANAND Mobile No.:1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	4,000.00 16-Nov-2006	NON-PAYING <small>Click for reasons</small>		

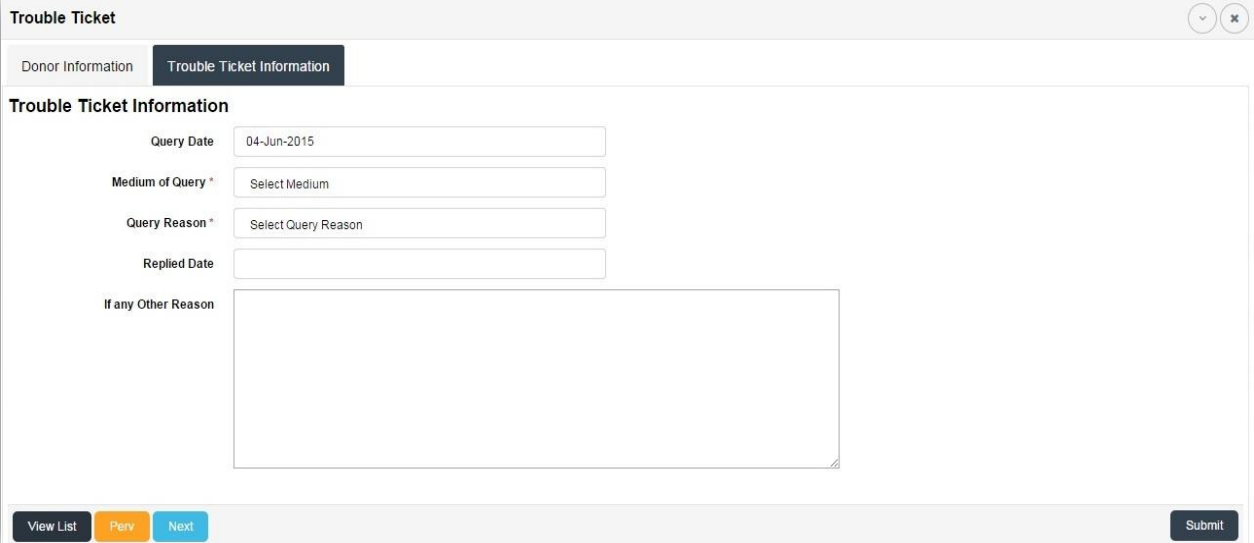
Showing 1 to 1 of 1 entries

[Previous](#) **1** [Next](#)

Press button  to view details of the ticket

Press button  to add the ticket

By pressing the button  , this will redirects you to new page to add new ticket (shown below).



**Trouble Ticket**

Donor Information | **Trouble Ticket Information**

**Trouble Ticket Information**

Query Date: 04-Jun-2015

Medium of Query \*: Select Medium

Query Reason \*: Select Query Reason

Replied Date:

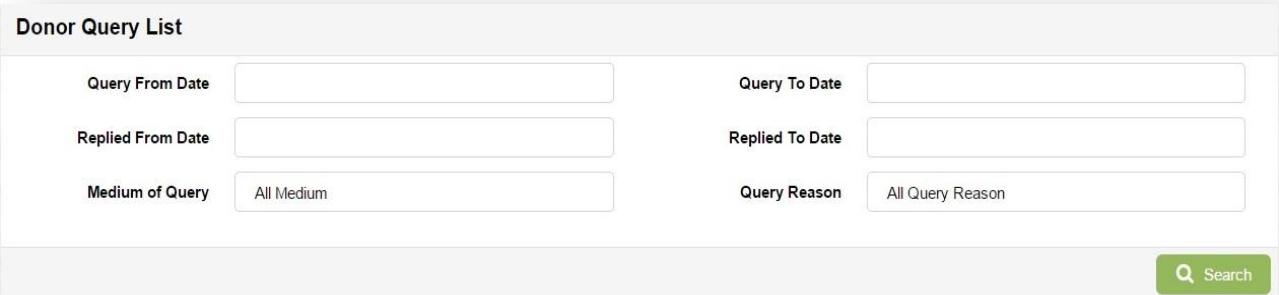
If any Other Reason:

View List | Report | Next | Submit

Fill up all the fields with the given information and press **“Submit”** button to finalize the ticket.

## REPORT

After pressing **“Report”** option, **“Donor Query List”** page will open to find the query list of the donor.



**Donor Query List**

Query From Date:

Query To Date:

Replied From Date:

Replied To Date:

Medium of Query: All Medium

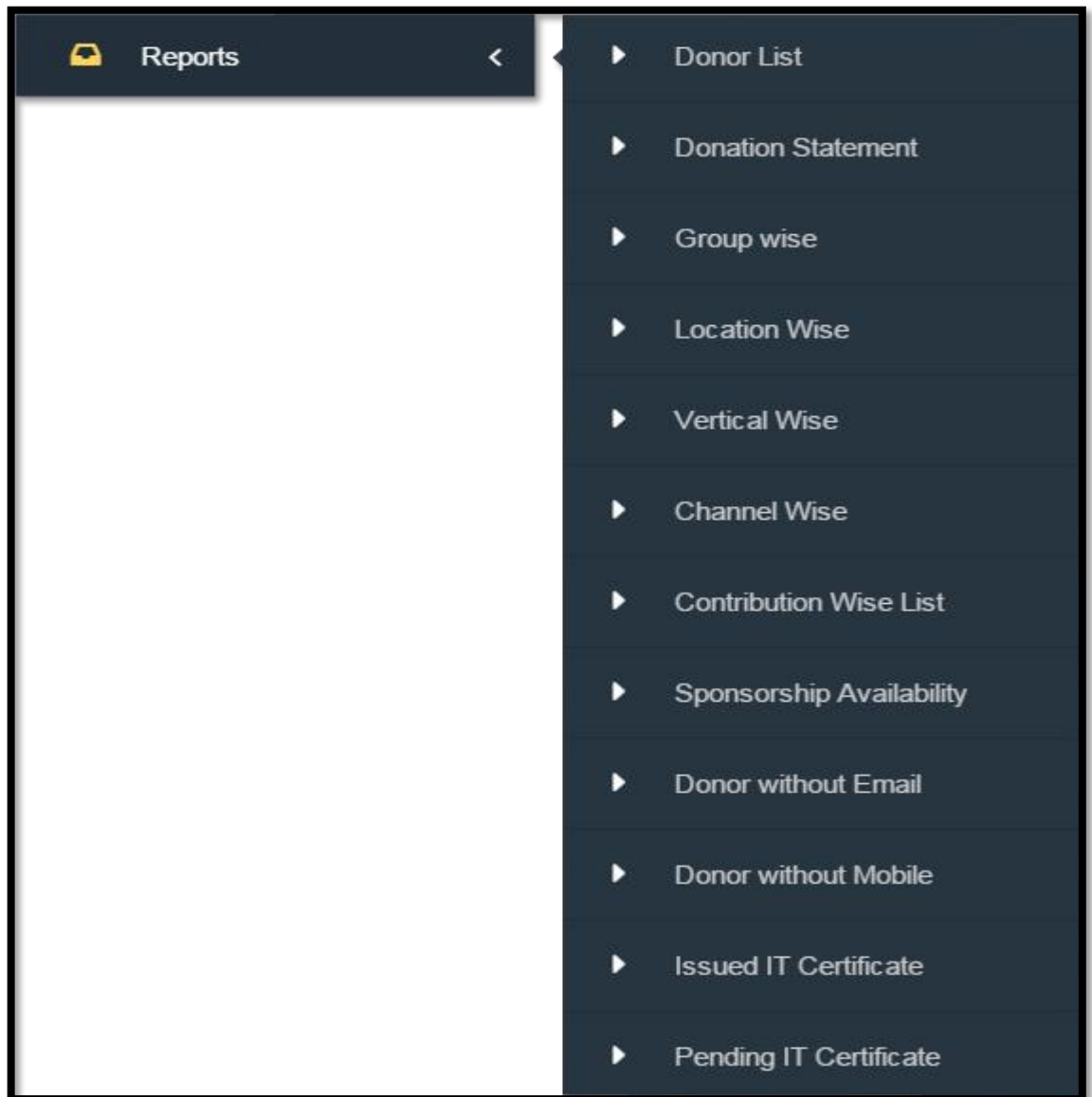
Query Reason: All Query Reason

Search

Enter all the required details in the blanks and press button **“Search”** to initialize search for specified donor.

## 4) Reports

This option “**Reports**” displays different lists of modules.  
There are twelve sub-categories modules in this option :



## Donor List

This displays the list of Donors that are registered.

The screenshot shows the 'Donor List' application window. It features a search and filter interface with the following sections:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI 4.
- Location Info:** Country (All) and State (All) dropdown menus.
- City Name:** A dropdown menu with the option: All.
- Joining:** From and To input fields.
- Contact No.:** Mobile and Phone input fields.
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV.
- Email:** ID input field and Search By (All) dropdown.
- Add. Criteria 1:** Vertical and Status (All) dropdown menus.
- Add. Criteria 2:** Product and Donor Type (All) dropdown menus.
- Purpose:** A dropdown menu with options: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH.
- Campaign Code:** An empty input field.

At the bottom of the window, there is a 'Customize Fields' button and a 'Get Report' button.

Fill all required field and the press “**Get Report**” option to get the list.

## Donation Statement

This option used to get the statement of donation.

The screenshot shows the 'Donation Statement' application window. It features a search and filter interface with the following sections:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI 4.
- Receipt:** From and To input fields.
- Contact No.:** Mobile and Phone input fields.
- Email:** ID and Cheque No. input fields.
- Purpose:** A dropdown menu with options: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH.
- Add. Criteria 1:** Deposit Slip and Pay Mode (All) dropdown menus.
- Add. Criteria 2:** Donor ID and PAN No. input fields.

At the bottom of the window, there is a 'Get Statement' button.

Fill all required field and the press “**Get Statement**” option to get the Statement.



## Group Wise

This option is used to get the Group-wise- list/report.

Group wise Donor List

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, All, Group Name, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

Customize Fields

Get Report

Fill all required field and the press “**Get Report**” option to get the group wise donor list.

## Location Wise

This option is used to get the Location-wise- list/report.

Location wise Donor List

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, All, Location, National

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

Customize Fields

Get Report

Fill all required field and the press “**Get Report**” option to get the location wise donor list.

## Vertical Wise

This option is used to get the Vertical-wise- list/report.

Vertical wise Donor List

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country All, State All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15BRINPGD

Get Report

Fill all required field and the press “**Get Report**” option to get the vertical wise donor list.

## Channel Wise

This option is used to get the Channel-wise- list/report.

Channel wise Donor List

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country All, State All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15BRINPGD

Get Report

Fill all required field and the press “**Get Report**” option to get the channel wise donor list.

## Contribution Wise List

This option used to get the Contribution-wise- list/report.

**Contribution wise Donor List**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From: , To:

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDPA

Contribution: From (₹): , To (₹):

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15SRINPGD

Customize Fields

Get Report

Fill all required field and the press “**Get Report**” option to get the contribution wise donor list.

## Sponsorship Availability

This option used to get the Sponsorship availability list.

**Sponsorship Availability List**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From: , To:

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDPA

Contribution: From (₹): , To (₹):

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15SRINPGD

Customize Fields

Get Report

Fill all required field and the press “**Get Report**” option to get the sponsorship availability list.

## Donor with/without Email

This option used to get list of donors with/without email.

**Sponsorship Availability List**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, All, Location: All

Add. Criteria 2: Product, All, Donor Type: All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

[Get Report](#)

Fill all required field and the press **“Get Report”** option to get the with/without email list.

## Donor without Mobile

This option used to get list of donors without mobile.

**Donor without Mobile/PAN Number**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Joining: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, Generate As: With Mobile Number

Add. Criteria 2: Product, All, Donor Type: All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

[Get Report](#)

Fill all required field and the press **“Get Report”** option to get the list of donors without mobile.

## Issued IT Certificate

This option used to get list of donors to whom IT certificates have been issued.

Issued IT Certificate (Donor List)

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Receipt: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

Get Report

Fill all required field and the press “**Get Report**” option to get list of donors to who have issued the certificate.

## Pending IT Certificate

This option used to get list of donors of whom IT certificates have been pending.

Pending IT Certificate (Donor List)

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Location Info: Country: All, State: All

City Name: All

Receipt: From, To

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DONATION BOX

Add. Criteria 1: Vertical, All, Location, All

Add. Criteria 2: Product, All, Donor Type, All

Purpose: All Purpose, CORPUS DONATION, EDUCATION, GENERAL DONATION, HEALTH

Campaign Code: F15MRINPGD, F15NRINPGD, F15DRINPGD, F15JRINPGD, F15ERINPGD, F15PRINPGD, F15DRINPGD

Get Report

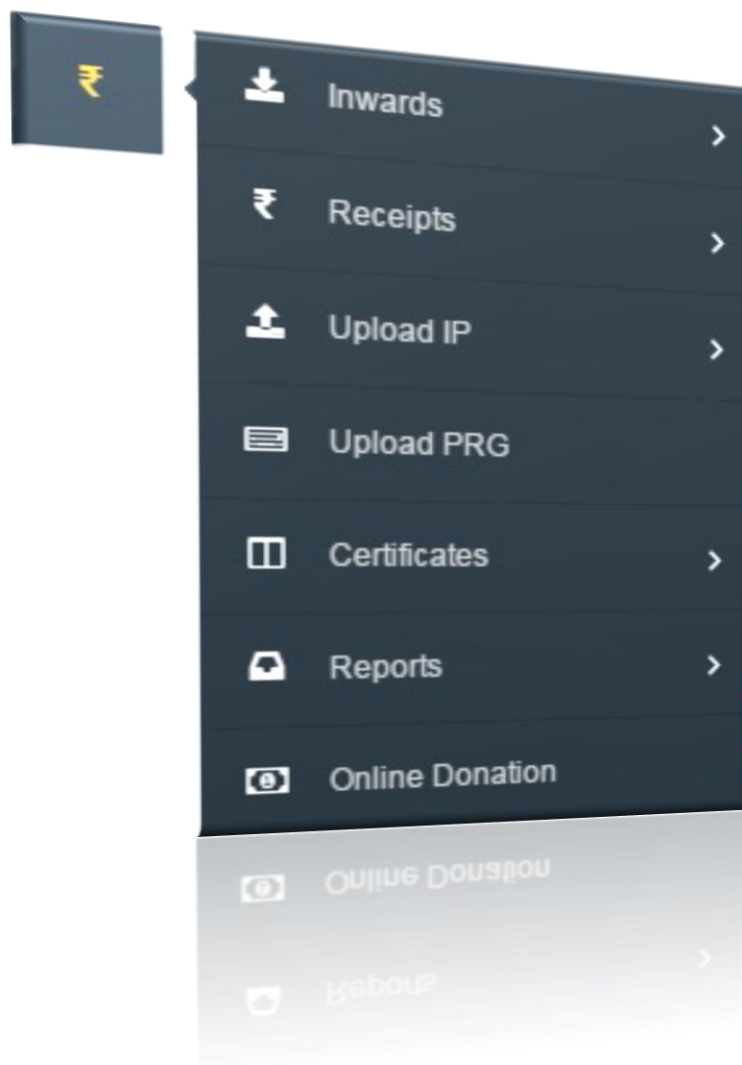
Fill all required field and the press “**Get Report**” option to get list of donors of whom certificates are pending.

## MANAGE COLLECTIONS

Different modules of collections are displayed in this “**Manage Collection**” option.

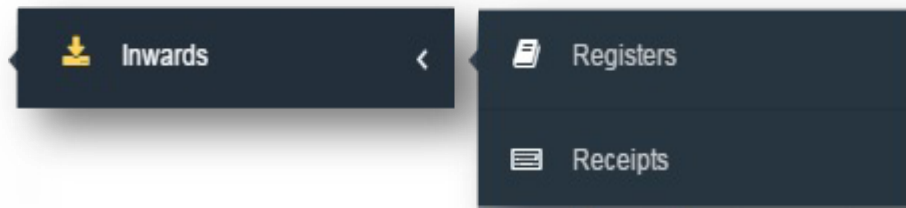
There are seven different sub-categories modules :

- Inwards
- Receipt
- Upload IP
- Certificates
- Reports
- Online Donation



# INWARDS

It is refer as a situation where the donor has submitted the donation in form of cash & cheque, and there occur any problem in generating the receipt. So, the receptionist will enter the details of the transaction of donor and then a temporary will be generated.



After everything become working again then the final receipt can be issued.

There are two sub-category modules in Inwards :

- Registers
- Receipts

## Registers

### Inwards Registers

[Search](#) [Export Data](#)

Donor Ref.

ECS & Cr/Card

Donor Name

Address

Add. Criteria1

Add. Criteria2

Joining Period

Location

Add. Criteria3

Add. Criteria4

[View List](#) [Search](#)

DonorID	Name	Operation	Product	Address	Location	Status	Contributions / Sponsorship	Add Inwards Details
NCO/23	TIRLOCHAN ANAND Mobile No. : 1125440847	NCO/1	ONE TIME DONORS	AD 30 IST FLOOR TAGORE GARDEN, New Delhi, Delhi India Pin: 110027 Email :	National	NON-PAYING <a href="#">Click for reasons</a>		



Enter the details in all the fields and after filling press “**Search**” button. That will display the specified donor whose receipt needs to finalize.



To view contribution/sponsorship details,



To add inwards details

## Receipts

**Search Inwards Cheque(Donation)** Q Search ≡ Export Data

Name	<input type="text"/>	Pay Mode	All
Operation Name	Select Operation Name ▼	Year	All ▼
Receiving Date	<input type="text"/>	Type	With & Without Both

Q Search

S.No.	Pay Mode	Name	Chq. Number	Chq. Date	Bank Name	Branch(location)	Amount	Operation ID	Issue Receipts
-------	----------	------	-------------	-----------	-----------	------------------	--------	--------------	----------------

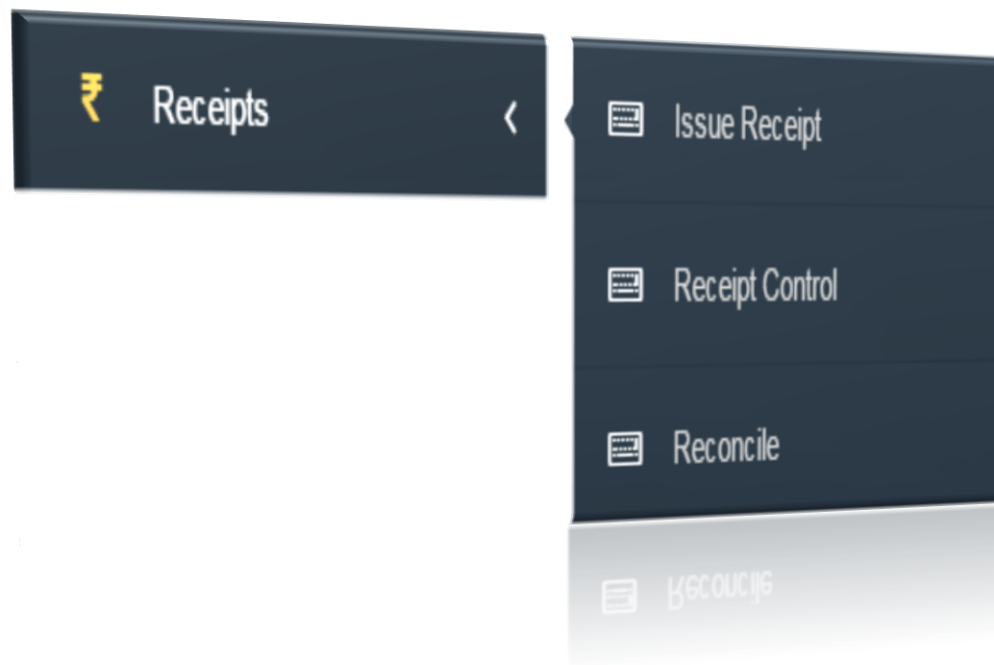
Enter the details in all the fields and after filling press “**Search**” button. That will display the specified donor whose cheque donation needs to finalize.

Press the “**Issue Receipt**” button to finalize the process.



## RECEIPTS

The processing of the donors receipts and various functions performs in the “**Receipts**” tab.



There are three sub-category modules in “Receipts” :

- Issue Receipts
- Receipt Control
- Reconcile



### **1) Issue Receipt**

After the donor has made the donation to the organization and then to finalize that transaction there is need to generate the donation receipt.

To issue the receipt, click on “**Issue Receipt**” option. Clicking this button will redirect you to page “**Donor Search to Issue Receipt**”.

**Donor Search to Issue Receipt**

Donor Ref. <input type="text" value="ID"/> <input type="text" value="Mobile No."/>	Add. Criteria2 <input type="text" value="Operation"/> <input type="text" value="All Operation"/> <input type="text" value="Type"/> <input type="text" value="All Type"/>
ECS & Cr/Card <input type="text" value="ECS ID"/> <input type="text" value="Cr/Card ID"/>	Joining Period <input type="text" value="From"/> <input type="text" value="To"/>
Donor Name <input type="text"/>	Location <input type="text" value="Country"/> <input type="text" value="All"/> <input type="text" value="State"/> <input type="text" value="All"/>
Address <input type="text"/>	Add. Criteria3 <input type="text" value="City"/> <input type="text" value="All"/> <input type="text" value="Product"/> <input type="text" value="All"/>
Add. Criteria1 <input type="text" value="PAN No."/> <input type="text" value="Form No."/>	Add. Criteria4 <input type="text" value="Email ID"/> <input type="text" value="Phone No."/>

DonorID	Name	Operation	Product	Address	Location	Status	Contributions / Sponsorship	Receipt Issue
NCO/195775	MS. VASANTHY SUBRAMANIAM Mobile No. :984915421,	NCO/1	ONETIME DONORS	SYNOPSIS, BANGALORE, Bangalore / Bengaluru, Karnataka India Pin: 560033 Email : ssvaasanth@gmail.com	National	PAYING		

Search the donor of whom you want to issue the receipt by entering the name or id.

After the search is over, the specified donor showed up. There are two operations that can be done;

 To view contribution details,

 To issue receipt

## 2) Receipt Control

This tab has all control over Issue of receipt.

Enter all required details in the blank columns and then press “**Search**” button to find the receipt of donor.

**Search to Update Receipt** Q Search ≡ Export Data

Year ID:  Add Info.:

Donor ID:  Pay Mode:

Name:  Cheque Number:

Receipt No.:  Dated:

Operation:  Bank:

Issue:   Email ID:

Mobile No.:

Issue New Receipt Q Search

S No	Year ID	Donor ID	Operation ID	Product Type	Receipt No	Receipt Date	Amount	Print	Export	Edit	Letter
1.	2006	NCO/23	NCO/1	ONE TIME DONORS	NCO/1/2006/25	16-Nov-2006	4000.00				

Then there will be four operations that can be done with the receipt :

 click it to print donation receipt

 click it to generate Pdf

 click it to edit the donation receipt

 click it to print cancel letter

### 3) Reconcile

In “**Reconcile**”, there are uncompleted transaction that needs to be finalized.

**Search Receipt to Reconcile** Search Export Data

Deposit Slip No.  Deposited Bank

Issue Date   Cheque No.

Cheque Date   Reconcile Date

Search

Show  entries Search:

#	S No	Donor ID	Operation ID	Cheque No	Cheque Date	Receipt No	Receipt Date	Slip No.	Amount	Hold	Clear	Bounce	Reason
<input type="checkbox"/>	1.	NCO/106650	JAI/6	045089	18-May-2015	JAI/6/2015/51	18-May-2015	88555dc1ac04686	4000.00	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Enter the details of the transaction made through cheque in the following boxes (shown above).

Then press “**Search**” button to find the specified record.

After the record shown up, then there will be three options appears :

**Hold** : check this option if the transaction is not completed and put that transaction on hold.

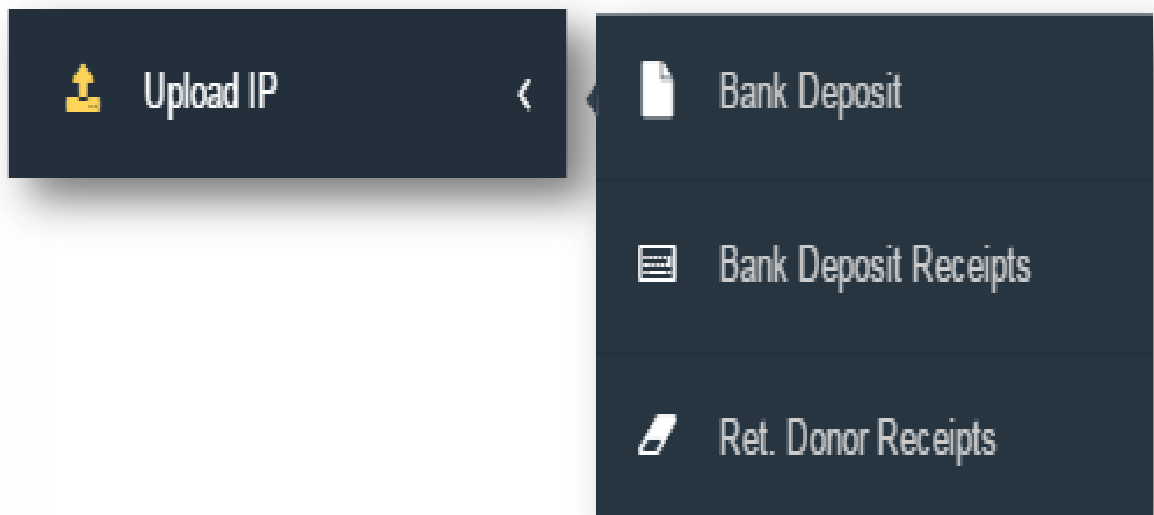
**Clear** : check this option if the issued cheque is cleared than transaction completed.

**Bounce** :check this option if the issued cheque is bounced and the transaction is not completed.

**Reason** : just write some explanation about transaction.

## UPLOAD IP

This option “**Upload IP**” allow the user to upload the different deposit entities of the Individual Partner.



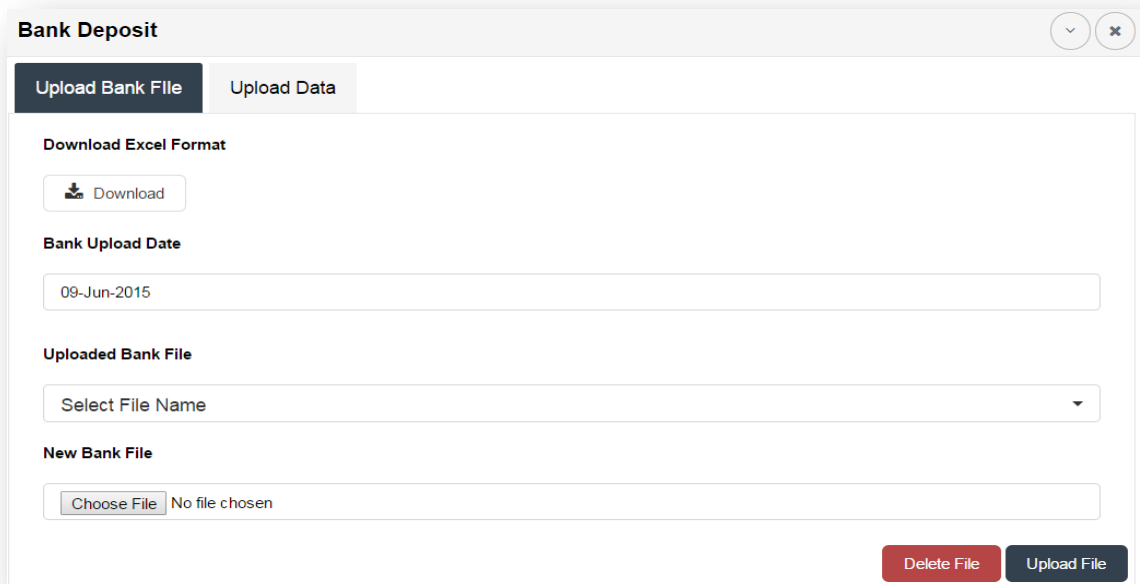
There are three sub-category modules in “Receipts” :

- Bank Deposit
- Bank Deposit Receipts
- Ret. Donor Receipts

## 1) Bank Deposit

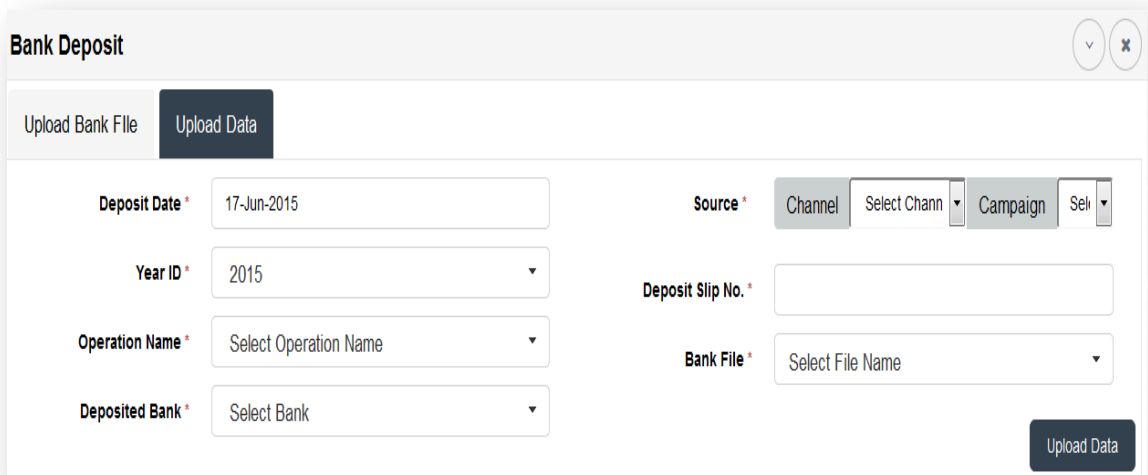
In **“Bank Deposit”**, there are bank files of completed transaction that needs to be processed.

First option **“Upload Bank File”**, fill all the details in the fields and choose New file that is required to be uploaded. Then press **“Delete File”** option to delete the specified file or press **“Upload File”** to upload it.



The screenshot shows the 'Bank Deposit' window with the 'Upload Bank File' tab selected. The interface includes a 'Download Excel Format' section with a 'Download' button. Below that is the 'Bank Upload Date' field with the value '09-Jun-2015'. The 'Uploaded Bank File' section has a dropdown menu showing 'Select File Name'. The 'New Bank File' section has a 'Choose File' button and the text 'No file chosen'. At the bottom right, there are two buttons: 'Delete File' (red) and 'Upload File' (dark blue).

In **“Upload Data”** option fill all the fields and then press up **“Upload Data”** option.



The screenshot shows the 'Bank Deposit' window with the 'Upload Data' tab selected. The interface includes several input fields: 'Deposit Date \*' with the value '17-Jun-2015', 'Year ID \*' with the value '2015', 'Operation Name \*' with a dropdown menu showing 'Select Operation Name', and 'Deposited Bank \*' with a dropdown menu showing 'Select Bank'. On the right side, there is a 'Source \*' section with two dropdown menus: 'Channel' showing 'Select Chann' and 'Campaign' showing 'Sel'. Below these are 'Deposit Slip No. \*' and 'Bank File \*' fields, both with dropdown menus showing 'Select File Name'. At the bottom right, there is a dark blue 'Upload Data' button.

## 2) Bank Deposit Receipts

In “**Bank Deposit Receipts**”, fill all the fields and then press up “Search” button to intialized the search for the specified user details.

**Search to Issue Receipt** Q Search ≡ Export Data

Year ID	All Year	Operation	All Operation
Deposit Period	From To	Deposit Slip No	
Add. Search	Mobile Form No.	Type	Without Receipts

Q Search

After the search process is complete then two operation can be performed with the specified donor record :

Transfer : It transfer the excel data to issue receipt database.

Delete: It deletes the specified donor record from the list.

**Search to Issue Receipt** Q Search ≡ Export Data

S No	Year ID	Donor Name	Operation ID	Cheque No.	Cheque Date	Deposit Date	Deposit Slip No.	Purpose	Amount	Transfer	Delete
1.	2015	SATYA NARAYANA VENKATA DASARI	DEL/27	207878	6-Apr-2014	16-Apr-2015	120	GENERAL DONATION	2000.00		

### 3) Ret. Donor Receipts

Retention Donor Receipts option is used to issue receipts for donations coming from existed donors.

In **“Upload DM File”** option, upload new file of the existed donor or delete the specified file record of the donor.

The screenshot shows the 'Ret. Donor Receipts' window with the 'Upload DM File' tab selected. The form is titled 'Upload DM File (Existing Donor)'. It contains the following fields and controls:

- Upload Date \***: A text input field containing '17-Jun-2015'.
- Uploaded DM File**: A dropdown menu with 'Select File Name'.
- New DM File**: A 'Browse...' button and a text area containing 'No file selected.' Below this is a note: '(file format accept only .csv)'. A red asterisk indicates this is a required field.
- Buttons**: 'Delete File' (red) and 'Upload File' (dark blue).
- Legend**: '\* Required Field'.

In **“Issue Receipt”** option fill all the fields in required tabs and press **“Issue receipt”** button to finalize the process.

The screenshot shows the 'Ret. Donor Receipts' window with the 'Issue Receipt' tab selected. The form is titled 'Issue Receipt (Existing Donor)'. It contains the following fields and controls:

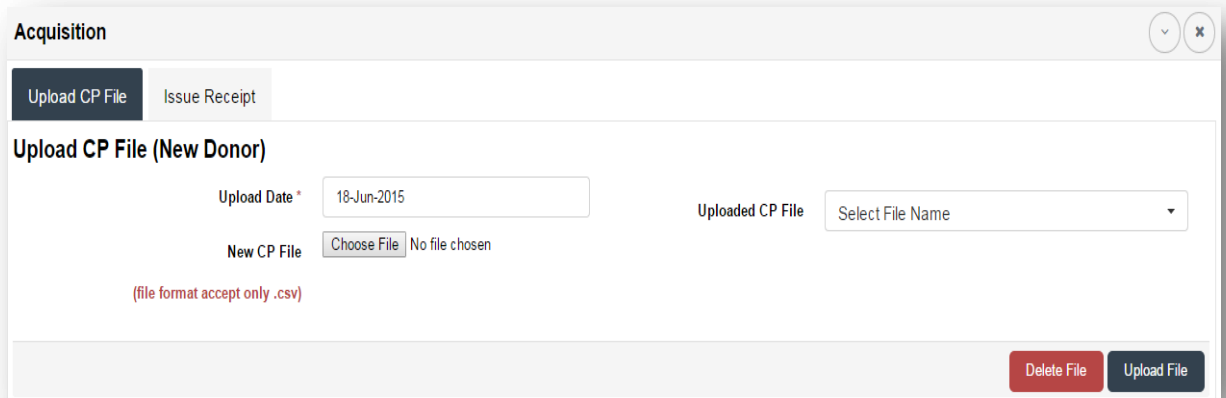
- DM File \***: A dropdown menu with 'Select File Name'.
- Operation Name \***: A dropdown menu with 'Select Operation Name'.
- Receipts Details**:
  - Receipt Date \***: Text input field with '18-Jun-2015'.
  - Year ID \***: Dropdown menu with '2015'.
  - Payment Mode**: Dropdown menu with 'Cheque'.
  - Cheque Number**: Text input field with a 'Cheque' button.
  - Dated**: Text input field.
  - Bank**: Text input field.
  - Branch**: Text input field.
  - Deposited Bank \***: Dropdown menu with 'Select Bank'.
  - Vertical**: Dropdown menu with 'INDIVIDUAL PARTNERSHIP'.
  - Source 1 \***: A group of dropdowns: 'Product Type', 'Select Product', 'Purpose', 'Select F'.
  - Group Name \***: Dropdown menu with 'Select Group'.
  - Source 2 \***: A group of dropdowns: 'Channel', 'PAY ROLL GI', 'Campaign', 'Select Camp'.
- Income Tax Exemption Certificate to be issued?**: Radio buttons for 'Not Require', 'Issue 35AC (100%)', and 'Issue 80G (50%)'.
- Buttons**: 'Issue Receipt' (dark blue).



## UPLOAD PRG

This option is used to upload the PRG file and process the receipt of pay role giving partner.

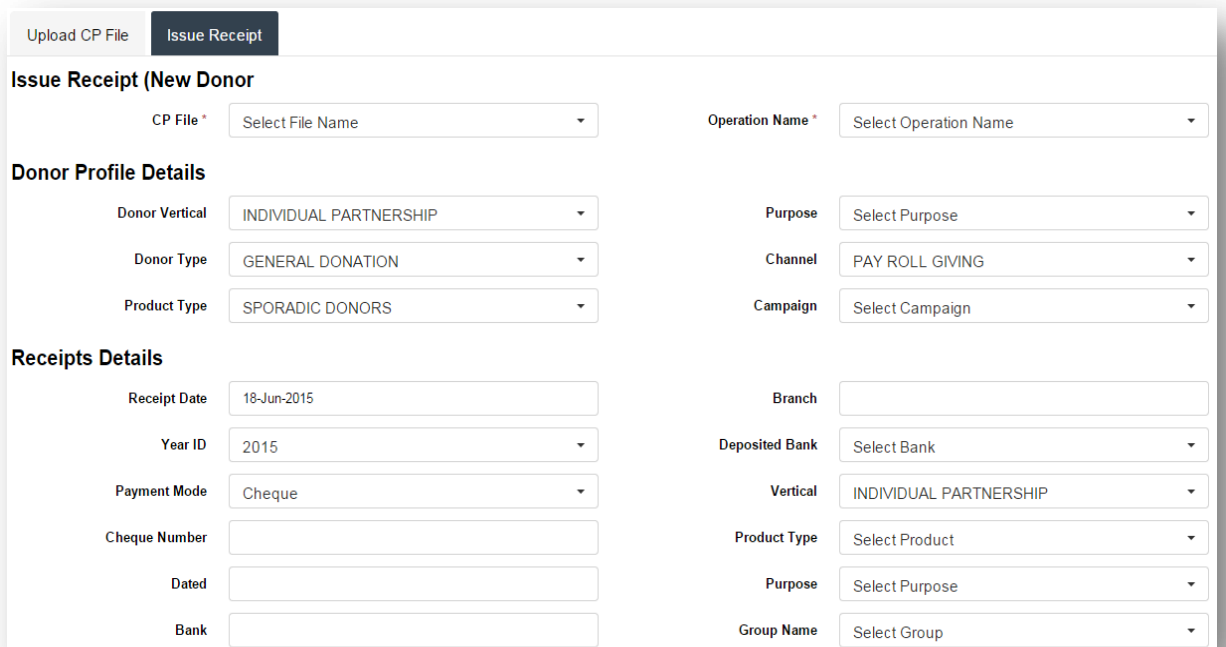
In **“Upload CP File”**, fill all the fields and then press up **“Upload”** button to upload the file for the specified user.



The screenshot shows a window titled "Acquisition" with two tabs: "Upload CP File" (active) and "Issue Receipt". The "Upload CP File (New Donor)" section contains the following fields and controls:

- Upload Date \***: Text input field containing "18-Jun-2015".
- Uploaded CP File**: Dropdown menu with "Select File Name".
- New CP File**: "Choose File" button and "No file chosen" text.
- File format note**: "(file format accept only .csv)" in red text.
- Buttons**: "Delete File" (red) and "Upload File" (dark blue) buttons at the bottom right.

In **“Issue Receipt”** option fill all the fields in required tabs and press **“Issue receipt”** button to finalize the process.



The screenshot shows the "Issue Receipt" tab in the "Acquisition" window. The "Issue Receipt (New Donor)" section contains the following fields and controls:

- CP File \***: Dropdown menu with "Select File Name".
- Operation Name \***: Dropdown menu with "Select Operation Name".
- Donor Profile Details**:
  - Donor Vertical**: Dropdown menu with "INDIVIDUAL PARTNERSHIP".
  - Donor Type**: Dropdown menu with "GENERAL DONATION".
  - Product Type**: Dropdown menu with "SPORADIC DONORS".
  - Purpose**: Dropdown menu with "Select Purpose".
  - Channel**: Dropdown menu with "PAY ROLL GIVING".
  - Campaign**: Dropdown menu with "Select Campaign".
- Receipts Details**:
  - Receipt Date**: Text input field containing "18-Jun-2015".
  - Year ID**: Dropdown menu with "2015".
  - Payment Mode**: Dropdown menu with "Cheque".
  - Cheque Number**: Text input field.
  - Dated**: Text input field.
  - Bank**: Text input field.
  - Branch**: Text input field.
  - Deposited Bank**: Dropdown menu with "Select Bank".
  - Vertical**: Dropdown menu with "INDIVIDUAL PARTNERSHIP".
  - Product Type**: Dropdown menu with "Select Product".
  - Purpose**: Dropdown menu with "Select Purpose".
  - Group Name**: Dropdown menu with "Select Group".

## RECEIPTS

The processing of the donors certificates and various functions performs in the “**Certificates**” tab.



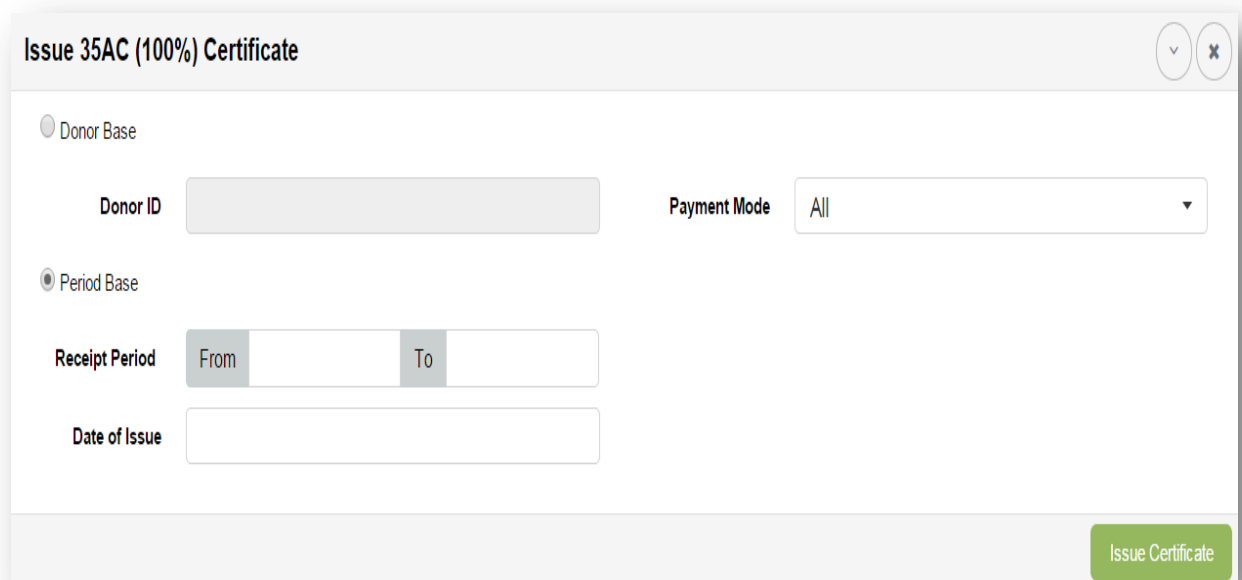
There are three sub-category modules in “Receipts” :

- Issue 35AC(100%)
- Print 35AC(100%)
- Issue 80G(50%)

## ISSUE 35AC

To issue the certificate of 35AC category to the respective donor, that will allow the donor to get benefit in taxation.

100% amount of what a person is donated to the organization will be discounted from his annual taxation amount.



The screenshot shows a web form titled "Issue 35AC (100%) Certificate". The form has two radio buttons: "Donor Base" (unselected) and "Period Base" (selected). Under "Donor Base", there is a "Donor ID" text input field and a "Payment Mode" dropdown menu currently set to "All". Under "Period Base", there is a "Receipt Period" section with "From" and "To" text input fields, and a "Date of Issue" text input field. A green "Issue Certificate" button is located at the bottom right of the form.

Complete all the details of the donor in required fields and then press **“Issue Certificate”** button to finalize the process.

## PRINT 35AC

To print the certificate of 35AC category to the respective donor, that will allow the donor to get benefit in taxation.

100% amount of what a person is donated to the organization will be discounted from his annual taxation amount.

### Print 35AC (100%) Certificate

Print  Pending Certificate  All Certificate

Donor ID

Certificate  From  To

Period

Certificate Type

Generate As

Check Mark All

#### Certificate List

Select	Issue ID	Issue Date	Donor ID	Name	Amount	Year ID	Prior Total	Printed	Period
<input type="checkbox"/>	1	15.04.2015	ALI/1		18,800.00	2006	18,800.00	Y	01.04.2015 -- 15.04.2015

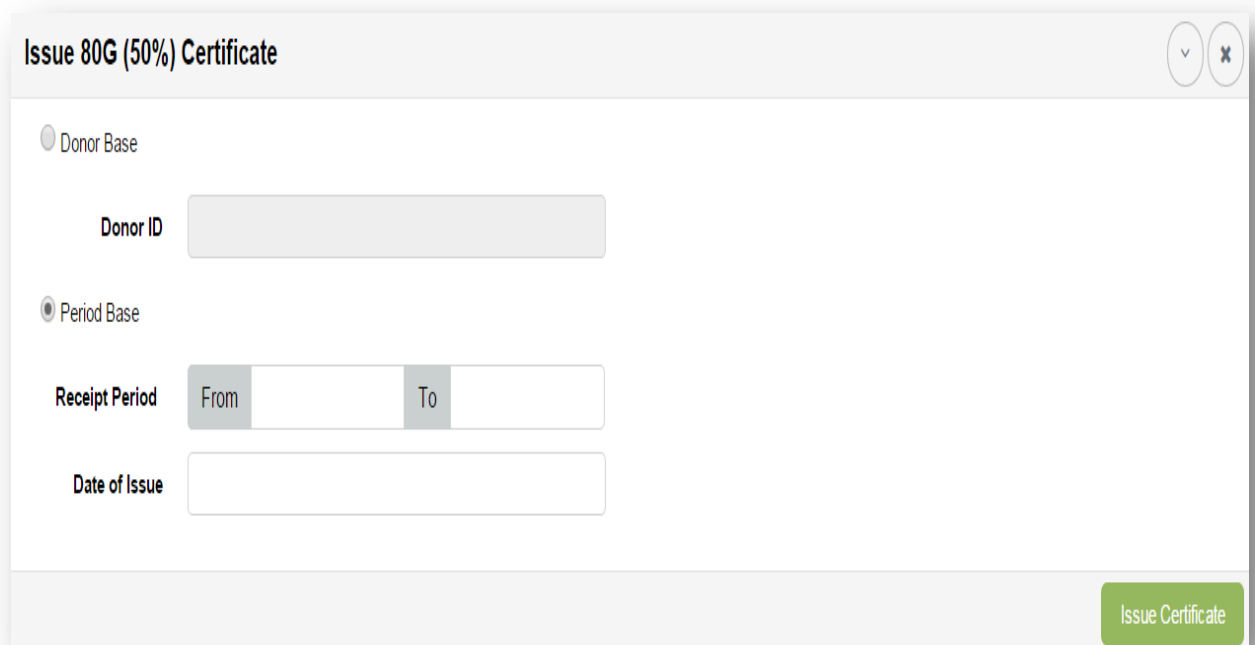
Complete all the details of the donor and certificate in required fields and then press “**Process**” button that will search the specified donor certificate.

After the specified showed up, then press “**Get Print**” button to the print the certificate and finalize the process.

## ISSUE 80G

To issue the certificate of 80G category to the respective donor, that will allow the donor to get benefit in taxation.

50% amount of what a person is donated to the organization will be discounted from his annual taxation amount.

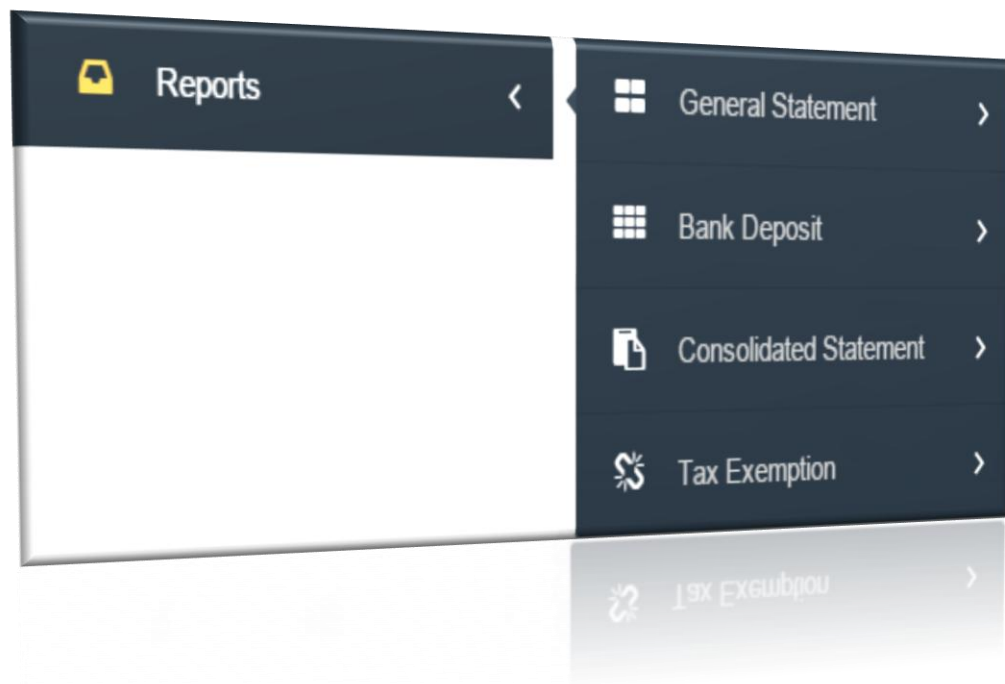


The screenshot shows a web form titled "Issue 80G (50%) Certificate". The form has two radio buttons for selection: "Donor Base" (unselected) and "Period Base" (selected). Below "Donor Base" is a text input field labeled "Donor ID". Below "Period Base" is a "Receipt Period" section with "From" and "To" labels and corresponding input fields. Below that is a "Date of Issue" text input field. In the bottom right corner, there is a green button labeled "Issue Certificate".

Complete all the details of the donor in required fields and then press **“Issue Certificate”** button to finalize the process.

## REPORTS

The processing of all the statements, documentation and other various functions performs in the “**Reports**” tab.



There are four sub-category modules in “Reports” :

- General Statement
- Bank Deposit
- Consolidated Statement
- Tax Exemption

# GENERAL STATEMENT

There are nine modules in the respective General Statement option:



## Date Wise Statement

This option is used to get the Date-wise-statement.

**Date wise Statement**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Receipt: From, To

Add. Criteria 1: Vertical, All, Product, All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDV

Receipt Range:  Less Than 1 Lac  Greater Than 1 Lac  All

Group Name: All Group, ADOR WELDING, AMICORP, APPLIED MATERIALS, ADVANTO

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND DRP

Payment Mode: All, Cheque, Cash, Money Order, Demand Draft

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130D1

Fund Raiser: Select

[Get Statement](#)

Fill all the required field and then press “**Get Statement**” option to get the list.

## Details Statement

This option is used to get the detailed statement of receipt.

**Receipt Details Statement**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Receipt: From, To

Add. Criteria 1: Vertical, All, Product, All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDV

Receipt Range:  Less Than 1 Lac  Greater Than 1 Lac  All

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND DRP

Payment Mode: All, Cheque, Cash, Money Order, Demand Draft

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130D1

Fund Raiser: Select

[Get Statement](#)

Fill all the required field and then press “**Get Statement**” option to get the Statement.



## Cash Statement

This option is used to get the date-wise Cash statement.

### Date wise Cash Statement

**Operation Name** All Operation  
FR-AHEMDABAD  
FR-BANGALORE  
FR-DELHI HO  
FR-DELHI 4

**Receipt** From To

**Add. Criteria 1** Vertical All Product All


**Channel** All Channel  
CROWDFUNDING PORTAL  
DIRECT MAIL  
DONATION BOX  
DDTV

**Receipt Range**  Less Than 1 Lac  Greater Than 1 Lac  All

**Purpose** All Purpose  
EDUCATION  
GENERAL DONATION  
HEALTH  
HUMANITARIAN AND DRD

**Payment Mode** All  
Cheque  
Cash  
Money Order  
Demand Draft

**Campaign Code** HD151130TX  
MD152130N1  
TD153120TY  
RD153131RM  
RC154130S1  
MD155130N2  
DD156130D1



Fill all the required field and then press “**Get Statement**” option to get the date wise Cash statement.

## Cancelled Receipts

This option is used to get the list of cancelled receipts.

### Cancelled Receipts List

**Operation Name** All Operation  
FR-AHEMDABAD  
FR-BANGALORE  
FR-DELHI HO  
FR-DELHI 4

**Receipt** From To

**Add. Criteria 2** Vertical All Product All

**Channel** All Channel  
CROWDFUNDING PORTAL  
DIRECT MAIL  
DONATION BOX  
DDTV

**Receipt Range**  Less Than 1 Lac  Greater Than 1 Lac  All

**Add. Criteria 3** Deposited Bank All Bank Show As Without Address


**Purpose** All Purpose  
EDUCATION  
GENERAL DONATION  
HEALTH  
HUMANITARIAN AND DRD

**Payment Mode** All  
Cheque  
Cash  
Money Order  
Demand Draft

**Receipt** From To

**Cancelled**

**Campaign Code** HD151130TX  
MD152130N1  
TD153120TY  
RD153131RM  
RC154130S1  
MD155130N2  
DD156130D1



Fill all the required field and then press “**Get Statement**” option to get the date wise Cash statement.

## Country Wise Receipts

This option is used to get the Country-wise receipt statement.

**Country wise Receipt Statement**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI 4

Receipt: From [ ] To [ ]

Add. Criteria 2: Vertical All, Product All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV

Receipt Range:  Less Than 1 Lac  Greater Than 1 Lac  All

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR

Add. Criteria 1: Country All Country, Pay Mode All

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, RD156130D1

[Get Statement](#)

Fill all the required fields and then press “**Get Statement**” option to get the Country-wise receipt statement.

## Special Contribution

This option is used to get the list of Special contributions .

**Special Contribution**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI 4

Receipt: From [ ] To [ ]

Add. Criteria 1: Vertical All, Product All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV

Receipt Range: From (₹) [ ] To (₹) [ ]

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR

Payment Mode: All, Cheque, Cash, Money Order, Demand Draft

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, RD156130D1

[Get Statement](#)

Fill all the required fields and then press “**Get Statement**” option to get the list of Special contributions.

## Date Wise Allocation

This option is used to get the list of date wise allocations .

**Date wise Allocation**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Receipt: From, To

Add. Criteria 1: Vertical All, Product All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDV

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR

Year ID: 2015

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD155130N1

Receipt Range:  Less Than 1 Lac  Greater Than 1 Lac  All

[Get Statement](#)

Fill all the required fields and then press “**Get Statement**” option to get the Statement.

## User Wise Statement

This option is used to get the User wise statement list.

**User wise Statement**

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO

Receipt: From, To

Add. Criteria 1: Vertical All, Product All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DDV

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR

Entry: From, To

Add. Criteria 3: Deposit Slip, Pay Mode All

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD155130N1

Receipt Range:  Less Than 1 Lac  Greater Than 1 Lac  All

Add. Criteria 2: User All, Cheque No.

[Get Statement](#)

Fill all the required fields and then press “**Get Statement**” option to get the Statement.


## Inwards Statement

This option is used to get the Inward statement.

### Inwards Statement

▼ ✕

Operation Name	All Operation ▼	Cheque Period	From	To			
Receiving	From	To	Add. Criteria 2	Year	All Year ▼	Cheque No.	
Period			Add. Criteria 3	Type	Pending Receipts ▼	Pay Mode	All ▼
Add. Criteria 1	Bank Name	Amount (₹)					

 Get Statement

Fill all the required fields in “**Inwards Statement**” page and then press “**Get Statement**” option to get the required Statement.

# BANK DEPOSIT

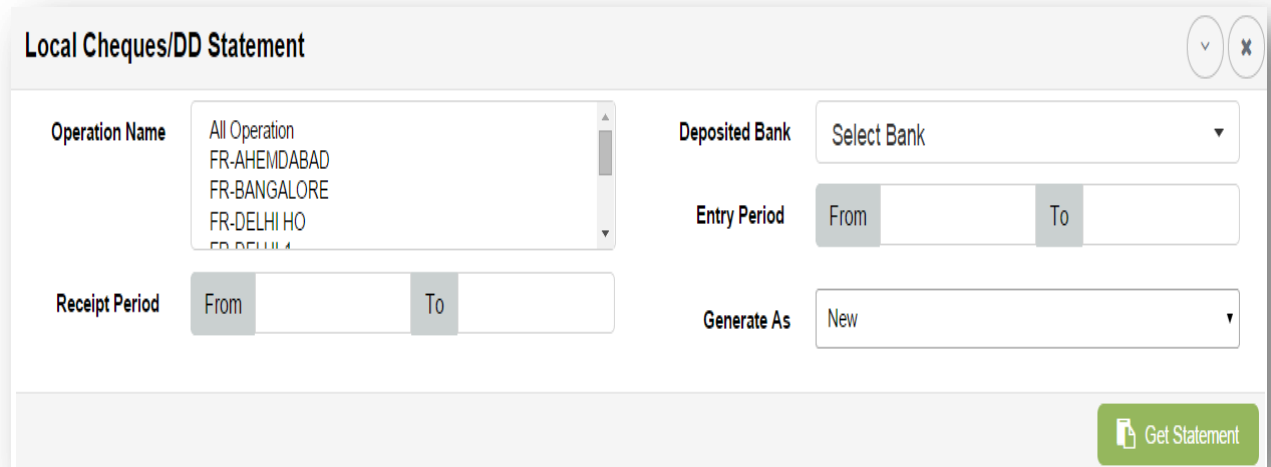
This option “**Bank Deposit**” allow user to manage the various functions in accordance to bank transaction.

There are twelve sub-category modules in “Bank Deposit”



## Local Cheques/DD

This option is used to get the Local Cheques/DD statement.

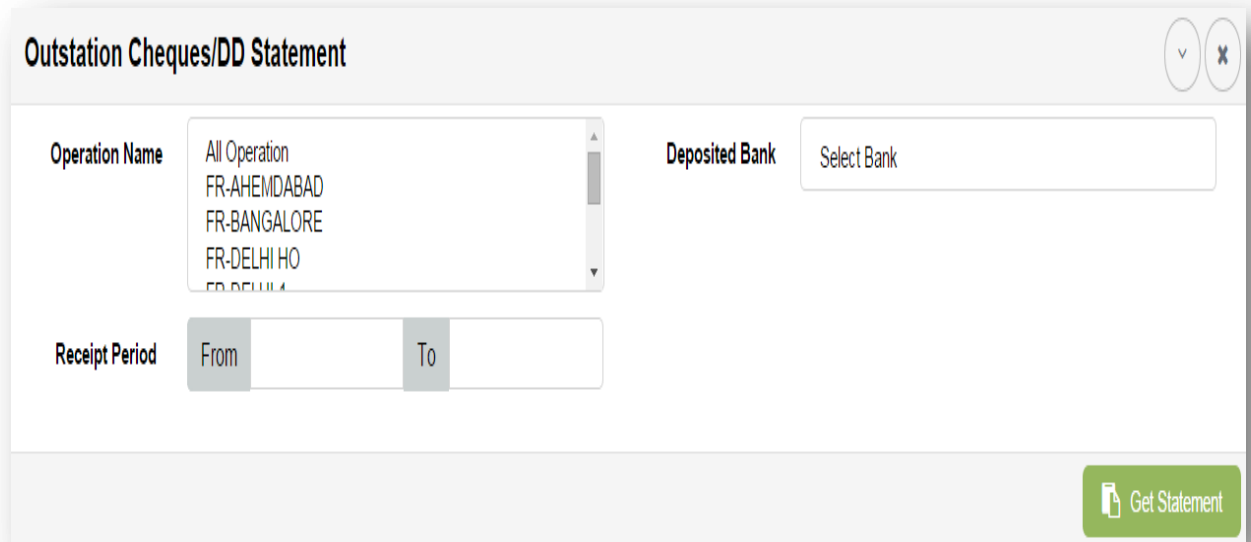


The screenshot shows a software window titled "Local Cheques/DD Statement". It contains several input fields: "Operation Name" with a dropdown menu showing options like "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI"; "Deposited Bank" with a dropdown menu showing "Select Bank"; "Entry Period" with "From" and "To" date pickers; "Receipt Period" with "From" and "To" date pickers; and "Generate As" with a dropdown menu showing "New". A green button labeled "Get Statement" is located at the bottom right of the window.

Fill all the required fields in the page and then press “**Get Statement**” option to get the required Statement.

## Outstation Cheques/DD

This option is used to get the Outstation Cheques/DD statement.

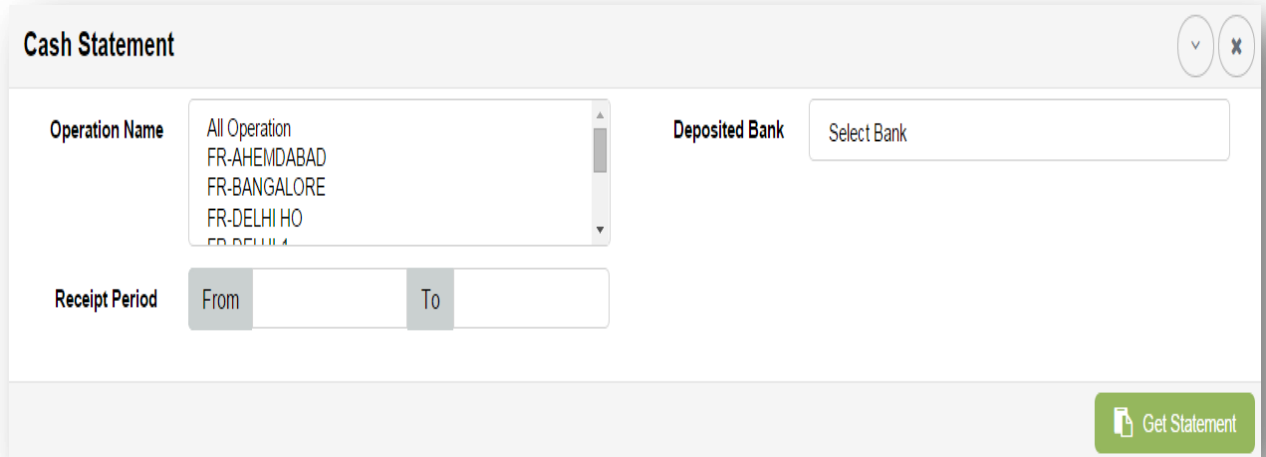


The screenshot shows a software window titled "Outstation Cheques/DD Statement". It contains several input fields: "Operation Name" with a dropdown menu showing options like "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI"; "Deposited Bank" with a dropdown menu showing "Select Bank"; and "Receipt Period" with "From" and "To" date pickers. A green button labeled "Get Statement" is located at the bottom right of the window.

Fill all the required fields in the page and then press “**Get Statement**” option to get the required Statement.

## Cash

Fill all the required fields in the Cash Statement page and then press “**Get Statement**” option to get the required Statement.



The screenshot shows a web form titled "Cash Statement". At the top right, there are two circular icons: a downward arrow and an 'X'. The form contains the following fields:

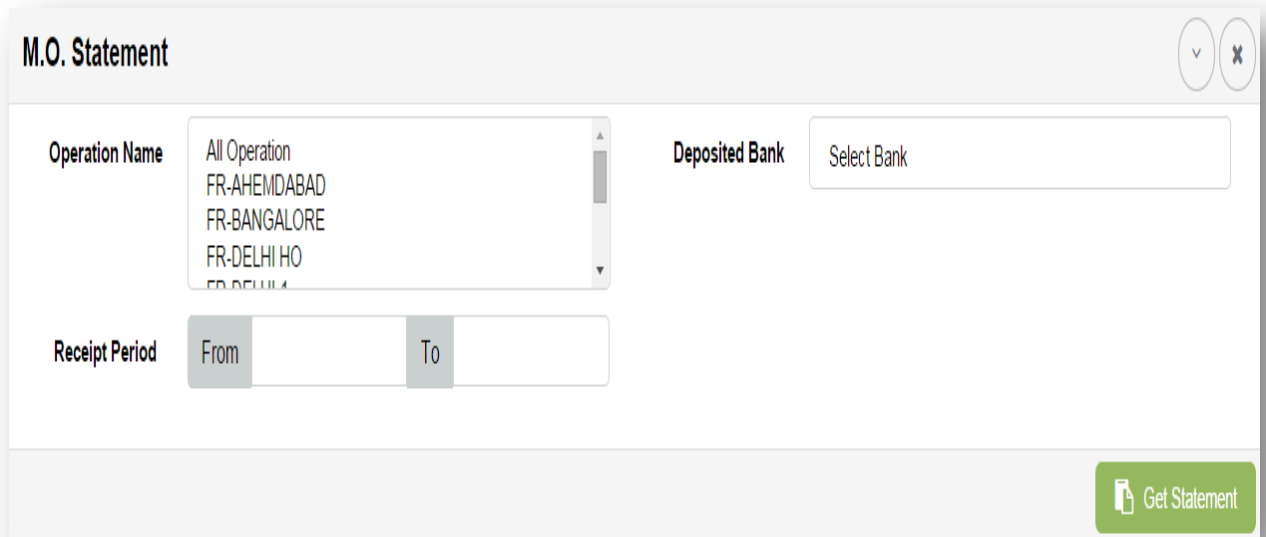
- Operation Name:** A dropdown menu with a scroll bar, showing options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI".
- Deposited Bank:** A text input field with the placeholder text "Select Bank".
- Receipt Period:** A date range selector with "From" and "To" labels and empty input boxes.

At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".

This option is used to get the Cash statement.

## Money Order

Fill all the required fields in the M.O. statement page and then press “**Get Statement**” option to get the required Statement.



The screenshot shows a web form titled "M.O. Statement". At the top right, there are two circular icons: a downward arrow and an 'X'. The form contains the following fields:

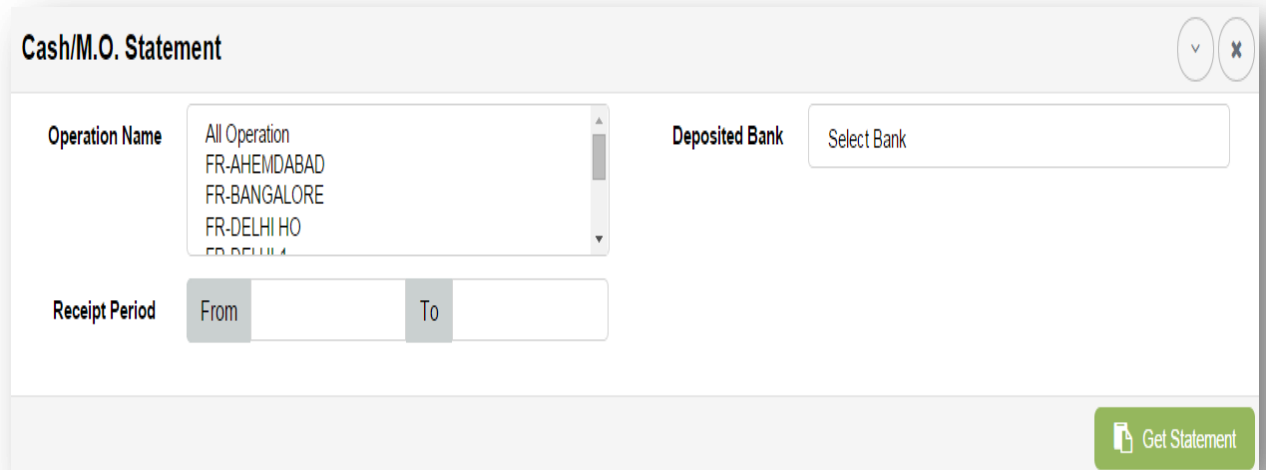
- Operation Name:** A dropdown menu with a scroll bar, showing options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI".
- Deposited Bank:** A text input field with the placeholder text "Select Bank".
- Receipt Period:** A date range selector with "From" and "To" labels and empty input boxes.

At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".

This option is used to get the Money Order statement.

## Cash/Money Order

Fill all the required fields in the Cash/M.O. Statement page and then press “**Get Statement**” option to get the required Statement.

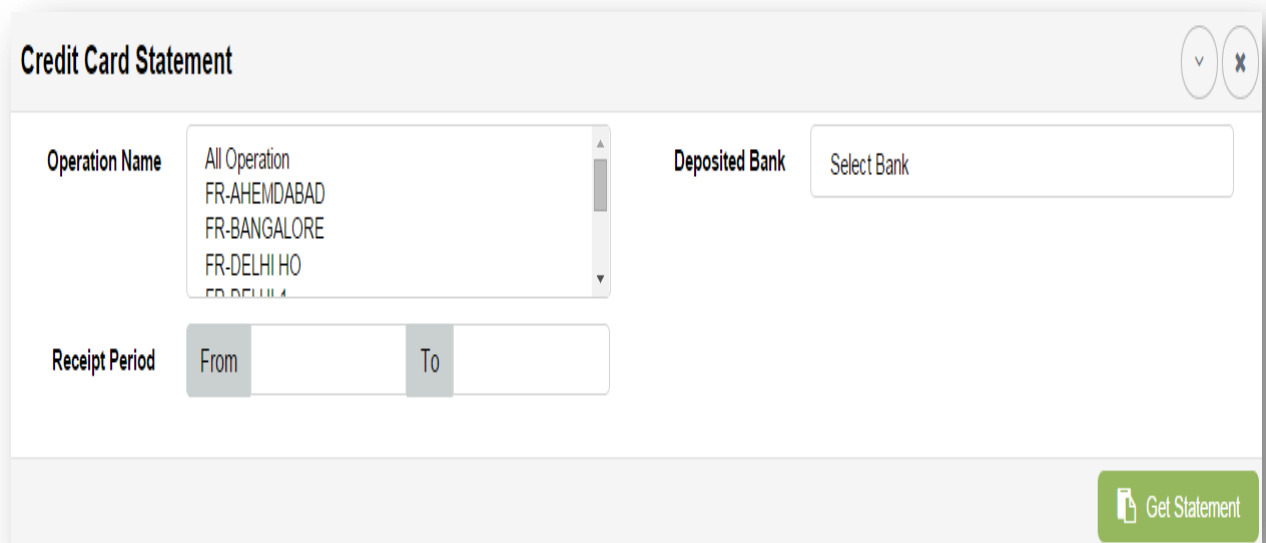


The screenshot shows a web form titled "Cash/M.O. Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with a "Select Bank" button. Below these is a "Receipt Period" section with "From" and "To" input fields. A green "Get Statement" button is located at the bottom right of the form.

This option is used to get the Cash/Money Order statement.

## Credit Card

Fill all the required fields in the Credit Card Statement page and then press “**Get Statement**” option to get the required Statement.



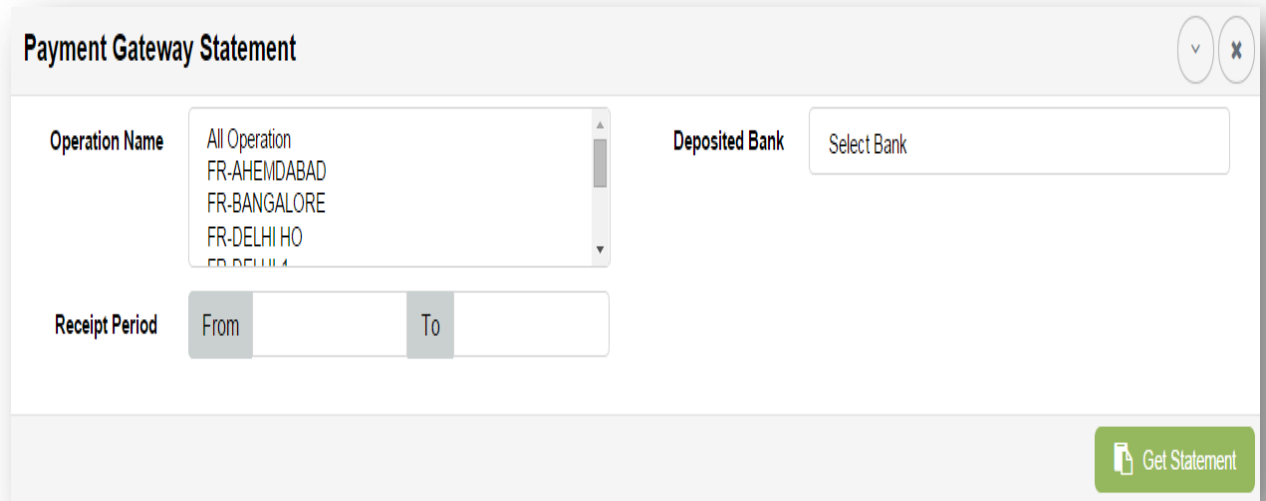
The screenshot shows a web form titled "Credit Card Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with a "Select Bank" button. Below these is a "Receipt Period" section with "From" and "To" input fields. A green "Get Statement" button is located at the bottom right of the form.

This option is used to get the Credit Card statement.



## Payment Gateway

Fill all the required fields in the Payment Gateway Statement page and then press “**Get Statement**” option to get the required Statement.

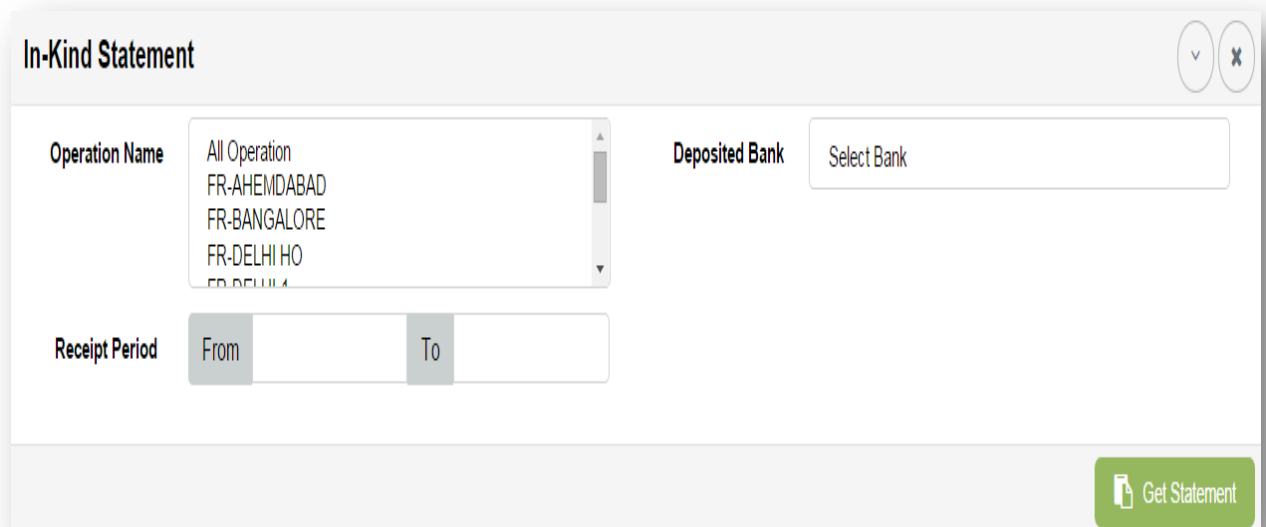


The screenshot shows a web form titled "Payment Gateway Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" input fields. A green button labeled "Get Statement" is located in the bottom right corner.

This option is used to get the Payment Gateway Statement.

## In-Kind

Fill all the required fields in the In-Kind Statement page and then press “**Get Statement**” option to get the required Statement.

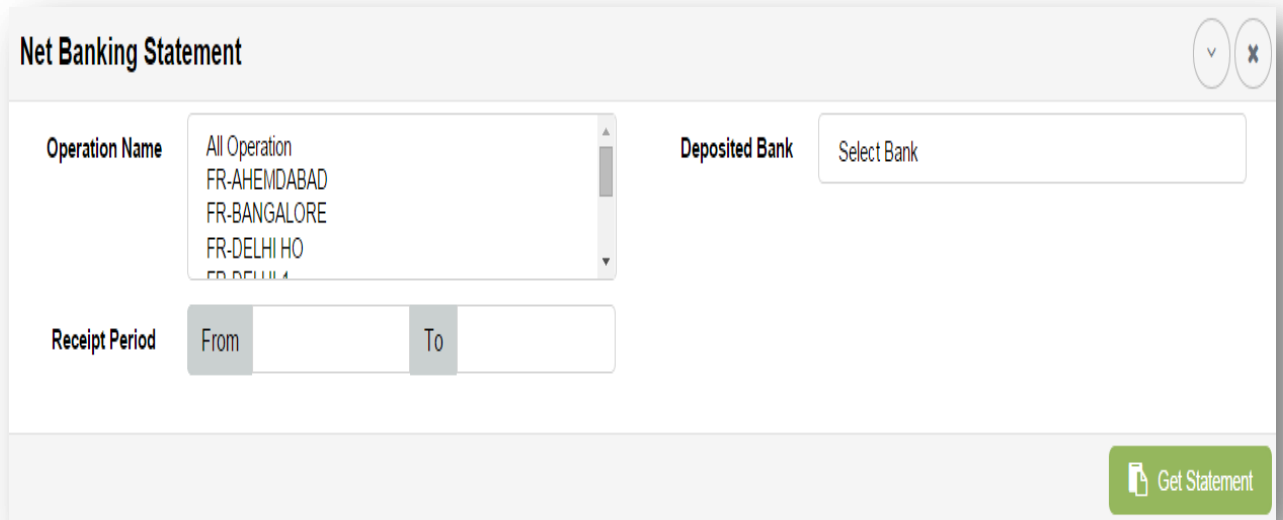


The screenshot shows a web form titled "In-Kind Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" input fields. A green button labeled "Get Statement" is located in the bottom right corner.

This option is used to get the In-Kind statement.

## Net Banking

Fill all the required fields in the Net Banking Statement page and then press “**Get Statement**” option to get the required Statement.

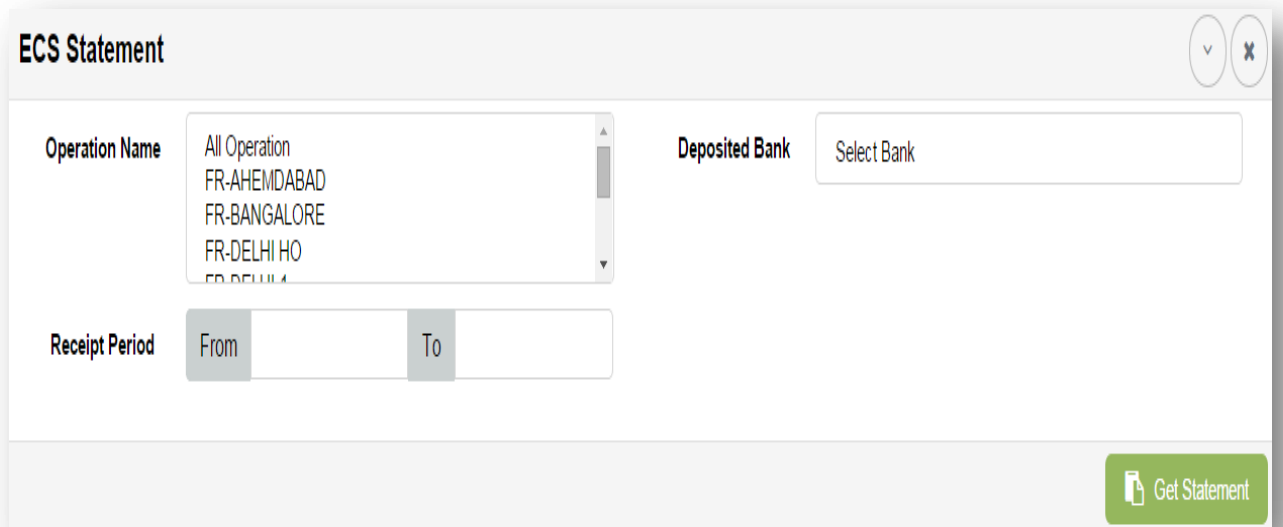


The screenshot shows a web form titled "Net Banking Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a text input field for "Deposited Bank" with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" date pickers. A green button labeled "Get Statement" is located at the bottom right of the form.

This option is used to get the Net Banking statement.

## ECS

Fill all the required fields in the ECS Statement page and then press “**Get Statement**” option to get the required Statement.

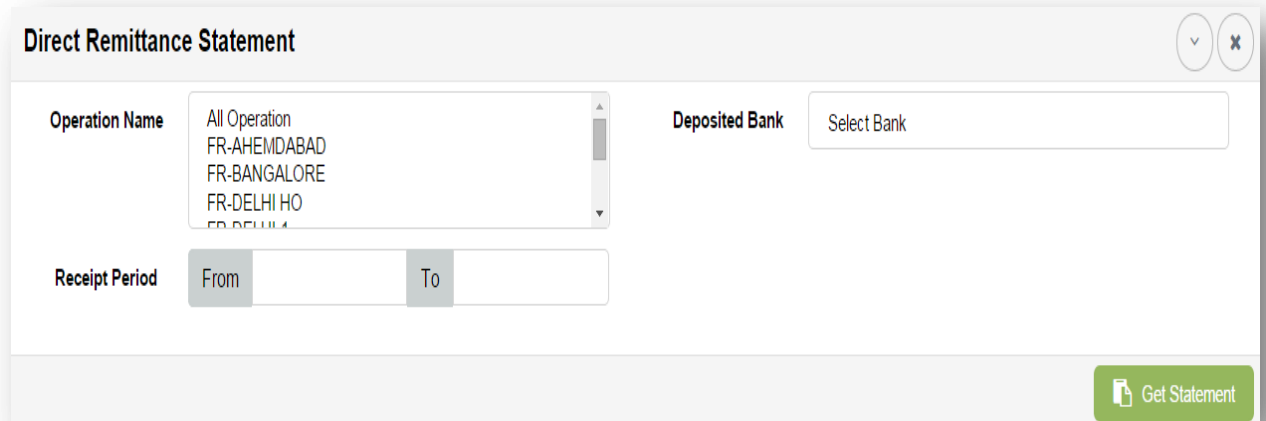


The screenshot shows a web form titled "ECS Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a text input field for "Deposited Bank" with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" date pickers. A green button labeled "Get Statement" is located at the bottom right of the form.

This option is used to get the ECS statement.

## Direct Remittance

Fill all the required fields in the Direct Remittance Statement page and then press “**Get Statement**” option to get the required Statement.

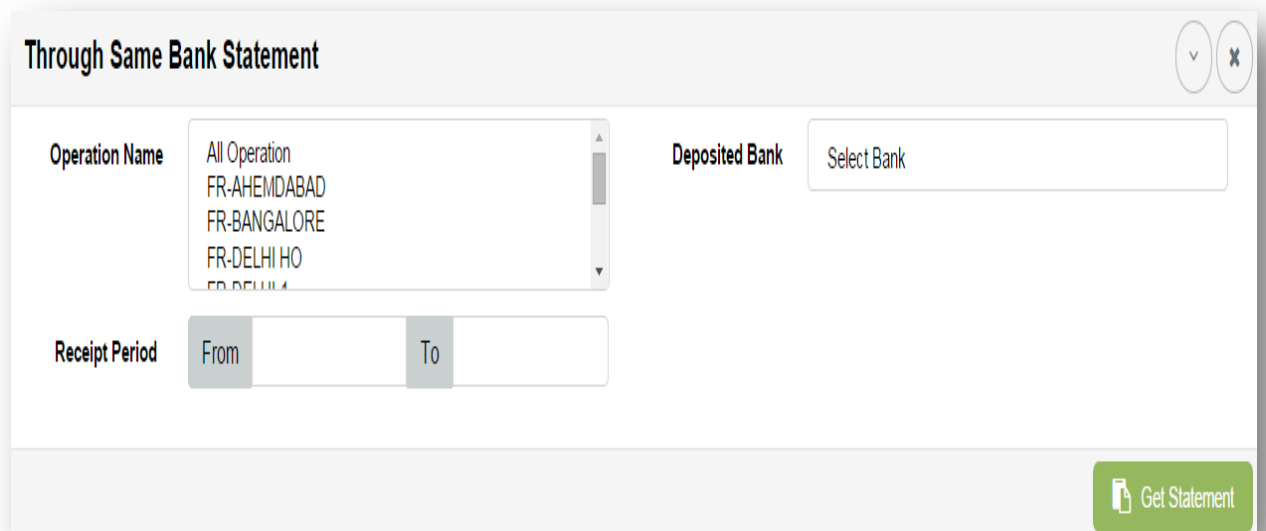


The screenshot shows a web form titled "Direct Remittance Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" input fields. A green "Get Statement" button is located in the bottom right corner.

This option is used to get the Direct Remittance statement.

## Through Same Bank

Fill all the required fields in the Through Same Bank Statement page and then press “**Get Statement**” option to get the required Statement.

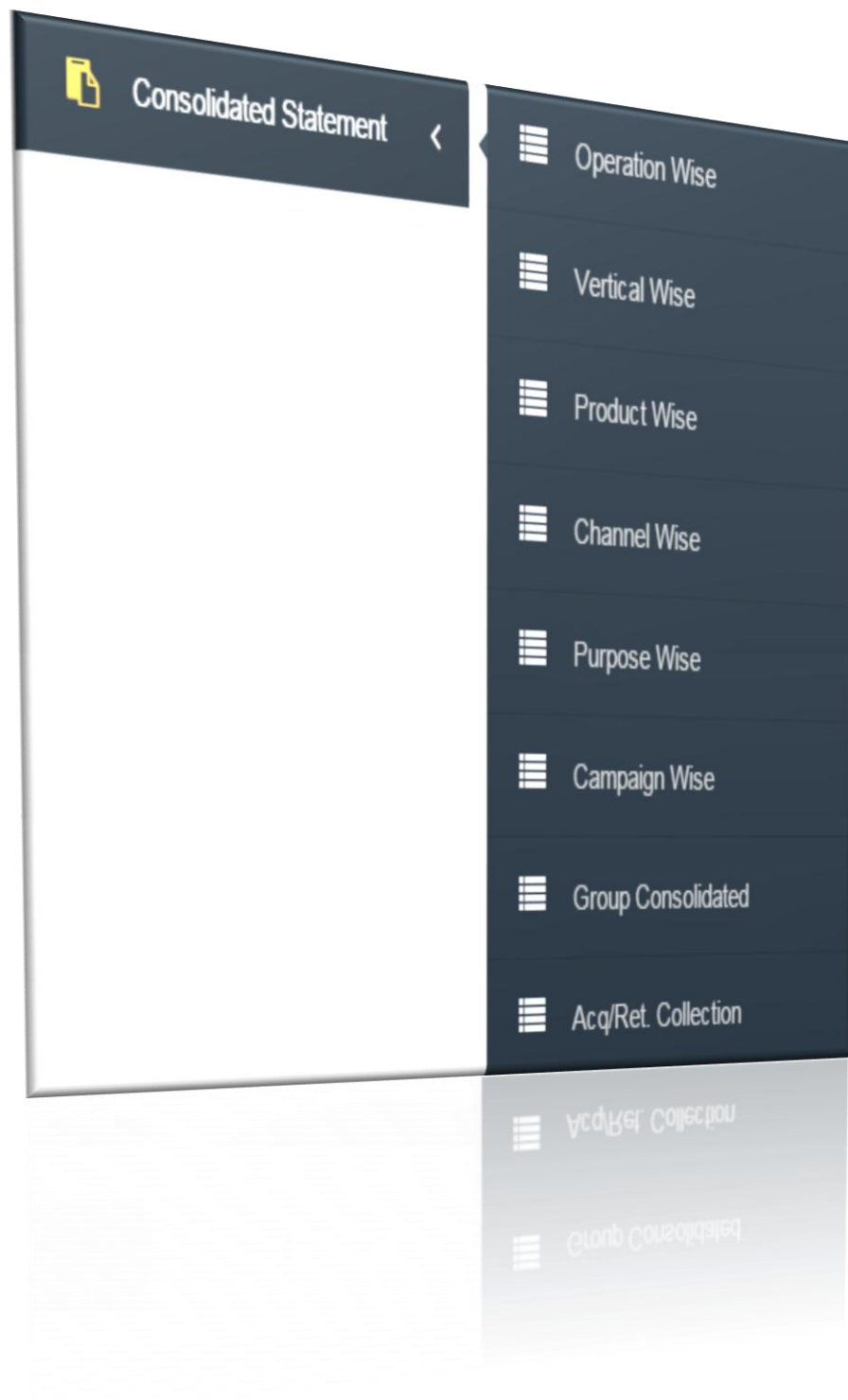


The screenshot shows a web form titled "Through Same Bank Statement". It features a dropdown menu for "Operation Name" with options: "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI". To the right is a "Deposited Bank" field with the placeholder text "Select Bank". Below these is a "Receipt Period" section with "From" and "To" input fields. A green "Get Statement" button is located in the bottom right corner.

This option is used to get the Through Same Bank statement.

# CONSOLIDATED STATEMENT

The processing of all the statements, documentation and other various functions performs in the “**Consolidated Statement**” tab. There are eight sub-category modules in “Consolidate Statement”



## Operation Wise

Fill all the required fields in the Operation wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.

The screenshot shows a web form titled "Operation wise Receipt Consolidate". It contains several sections for data entry:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO.
- Purpose:** A dropdown menu with options: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, URBAN MARGINAL AND RDR.
- Receipt:** Two input fields labeled "From" and "To".
- Pay Mode:** A dropdown menu with the option: All.
- Add. Criteria 1:** Two dropdown menus labeled "Vertical" and "Product", both set to "All".
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, RDR.
- Campaign Code:** A list of codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DR155130N1.
- With FCRA:** Radio buttons for Yes, No, and All.
- Collection:** A label with no input field.
- Get Statement:** A green button with a document icon and the text "Get Statement".

This option is used to get the Operation-wise receipt Consolidate statement.

## Vertical Wise

Fill all the required fields in the Vertical wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.

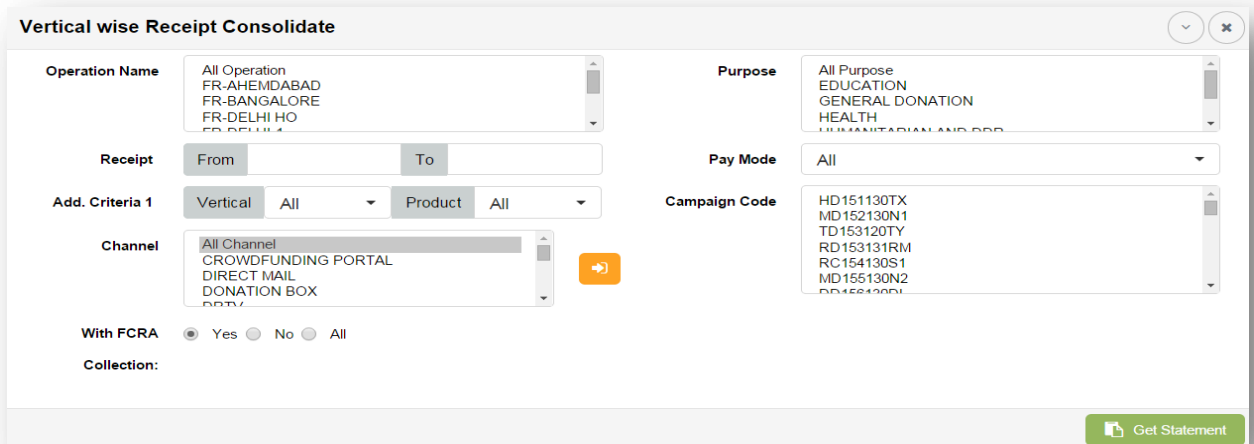
The screenshot shows a web form titled "Vertical wise Receipt Consolidate". It contains several sections for data entry:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO.
- Purpose:** A dropdown menu with options: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, URBAN MARGINAL AND RDR.
- Receipt:** Two input fields labeled "From" and "To".
- Pay Mode:** A dropdown menu with the option: All.
- Add. Criteria 1:** Two dropdown menus labeled "Vertical" and "Product", both set to "All".
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, RDR.
- Campaign Code:** A list of codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DR155130N1.
- With FCRA:** Radio buttons for Yes, No, and All.
- Collection:** A label with no input field.
- Get Statement:** A green button with a document icon and the text "Get Statement".

This option is used to get the Vertical wise Receipt Consolidate statement.

## Product Wise

Fill all the required fields in the Vertical wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.



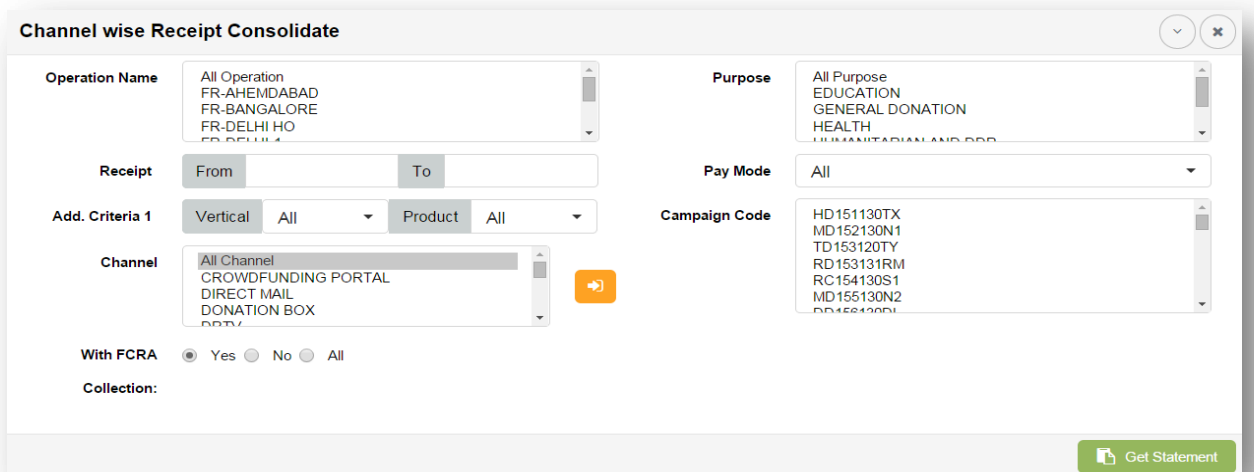
The screenshot shows the 'Vertical wise Receipt Consolidate' form. It includes the following fields and options:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI N.
- Purpose:** A dropdown menu with options: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR.
- Receipt:** Two input fields labeled 'From' and 'To'.
- Pay Mode:** A dropdown menu with the option: All.
- Add. Criteria 1:** Two dropdown menus labeled 'Vertical' and 'Product', both set to 'All'.
- Campaign Code:** A list box containing codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130P1.
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DD156130P1. An orange arrow icon is next to it.
- With FCRA:** Radio buttons for Yes, No, and All.
- Collection:** A label with no input field.
- Get Statement:** A green button with a document icon and the text 'Get Statement'.

This option is used to get the Vertical wise Receipt Consolidate statement.

## Channel Wise

Fill all the required fields in the Channel wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.



The screenshot shows the 'Channel wise Receipt Consolidate' form. It includes the following fields and options:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI N.
- Purpose:** A dropdown menu with options: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR.
- Receipt:** Two input fields labeled 'From' and 'To'.
- Pay Mode:** A dropdown menu with the option: All.
- Add. Criteria 1:** Two dropdown menus labeled 'Vertical' and 'Product', both set to 'All'.
- Campaign Code:** A list box containing codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130P1.
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, DD156130P1. An orange arrow icon is next to it.
- With FCRA:** Radio buttons for Yes, No, and All.
- Collection:** A label with no input field.
- Get Statement:** A green button with a document icon and the text 'Get Statement'.

This option is used to get the Vertical wise Receipt Consolidate statement.

## Purpose Wise

Fill all the required fields in the Purpose wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.

The screenshot shows a web form titled "Purpose wise Receipt Consolidate". It contains several sections: "Operation Name" with a dropdown menu; "Receipt" with "From" and "To" input fields; "Add. Criteria 1" with "Vertical" and "Product" dropdowns; "Channel" with a dropdown menu and an orange arrow button; "Purpose" with a dropdown menu; "Pay Mode" with a dropdown menu; "Campaign Code" with a list of codes; "With FCRA" with radio buttons for "Yes", "No", and "All"; and "Collection:" with a text input field. A green "Get Statement" button is located at the bottom right.

This option is used to get the Purpose wise Receipt Consolidate statement.

## Campaign Wise

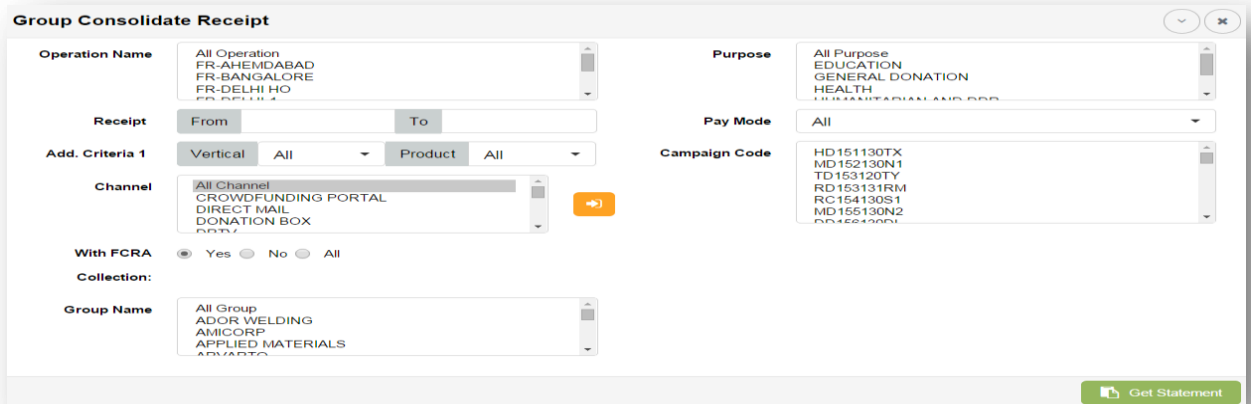
Fill all the required fields in the Purpose wise Receipt Consolidate page and then press “**Get Statement**” option to get the required Statement.

The screenshot shows a web form titled "Campaign wise Receipt Consolidate". It contains several sections: "Operation Name" with a dropdown menu; "Receipt" with "From" and "To" input fields; "Add. Criteria 1" with "Vertical" and "Product" dropdowns; "Channel" with a dropdown menu and an orange arrow button; "Purpose" with a dropdown menu; "Pay Mode" with a dropdown menu; "Campaign Code" with a list of codes; "With FCRA" with radio buttons for "Yes", "No", and "All"; and "Collection:" with a text input field. A green "Get Statement" button is located at the bottom right.

This option is used to get the Purpose wise Receipt Consolidate statement.

## Group Consolidated

Fill all the required fields in the Group Consolidate Receipt page and then press “**Get Statement**” option to get the required Statement.

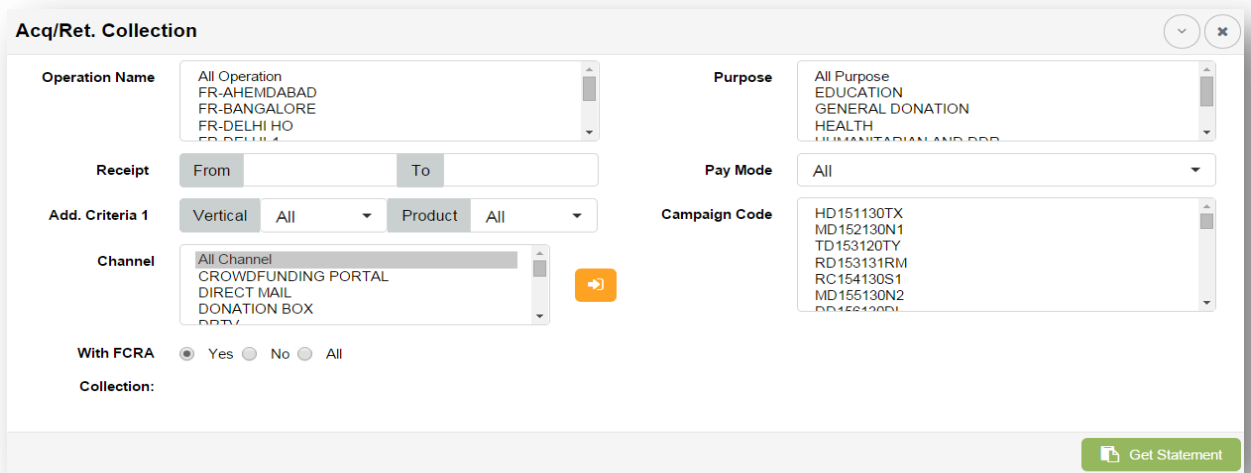


The screenshot shows the 'Group Consolidate Receipt' form. It includes several sections: 'Operation Name' with a dropdown menu; 'Receipt' with 'From' and 'To' input fields; 'Add. Criteria 1' with 'Vertical' and 'Product' dropdowns; 'Channel' with a dropdown menu and an orange arrow button; 'With FCRA' with radio buttons for 'Yes', 'No', and 'All'; 'Collection:'; 'Group Name' with a dropdown menu; 'Purpose' with a dropdown menu; 'Pay Mode' with a dropdown menu; and 'Campaign Code' with a list of codes. A green 'Get Statement' button is located at the bottom right.

This option is used to get the Consolidated Group Receipt statement.

## Acq/Ret. Collection

Fill all the required fields in the Acq/Ret. Collection page and then press “**Get Statement**” option to get the required Statement.



The screenshot shows the 'Acq/Ret. Collection' form. It includes several sections: 'Operation Name' with a dropdown menu; 'Receipt' with 'From' and 'To' input fields; 'Add. Criteria 1' with 'Vertical' and 'Product' dropdowns; 'Channel' with a dropdown menu and an orange arrow button; 'With FCRA' with radio buttons for 'Yes', 'No', and 'All'; 'Collection:'; 'Purpose' with a dropdown menu; 'Pay Mode' with a dropdown menu; and 'Campaign Code' with a list of codes. A green 'Get Statement' button is located at the bottom right.

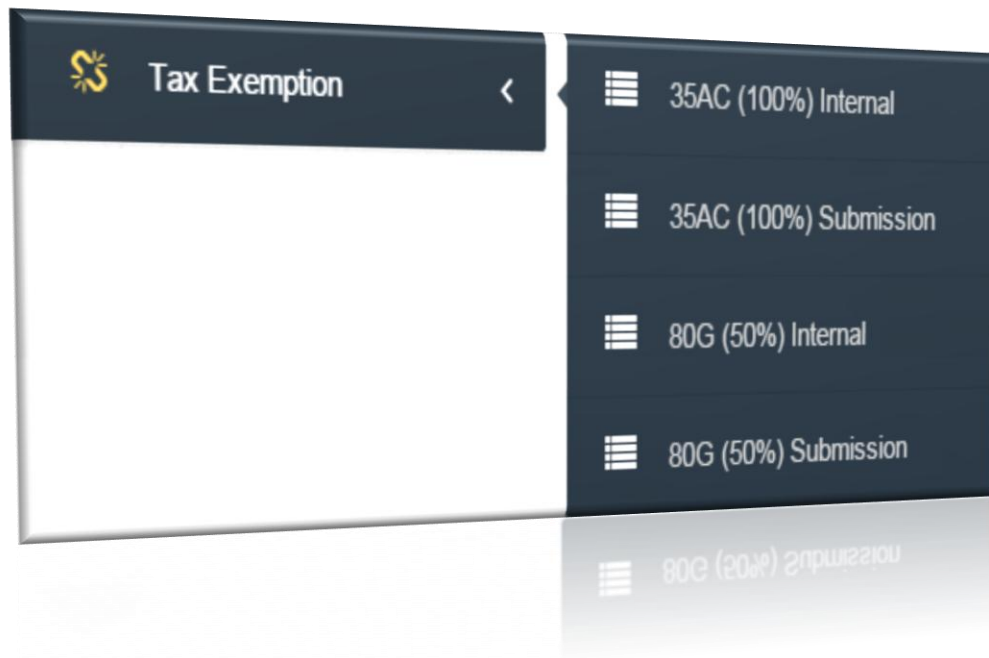
This option is used to get the Acq/Ret. Collection statement.



# TAX EXEMPTION

The processing of all the statements, documentation and other various functions performs in the “**Tax Exemption**” tab.

There are eight sub-category modules in “Tax Exemption”.



## 35AC (100%) Internal

Get the Internal statement of 35AC certificate.

A screenshot of a web application window titled '35AC (100%) Internal Statement'. The window has a light grey header with a dropdown arrow and a close button. Below the header, there are two main sections. The first section is labeled 'Operation Name' and contains a dropdown menu with the following options: 'All Operation', 'FR-AHEMDABAD', 'FR-BANGALORE', 'FR-DELHI HO', and 'FR-DELHI'. The second section is labeled 'Receipt Period' and contains two input fields: 'From' and 'To'. At the bottom right of the window, there is a green button with a document icon and the text 'Get Statement'.

## 35AC (100%) Submission

Get the Internal statement of 35AC certificate.

### 35AC (100%) Submission Statement

Operation Name

- All Operation
- FR-AHEMDABAD
- FR-BANGALORE
- FR-DELHI HO
- FR-DELHI 1

Receipt Period

From To

Get Statement

## 80G (50%) Internal

Get the Internal statement of 80G certificate.

### 80G (50%) Internal Statement

Operation Name

- All Operation
- FR-AHEMDABAD
- FR-BANGALORE
- FR-DELHI HO
- FR-DELHI 1

Receipt Period

From To

Get Statement

## 80G (50%) Submission

Get the Submission statement of 80G certificate.

**80G (50%) Submission Statement**

Operation Name

- All Operation
- FR-AHEMDABAD
- FR-BANGALORE
- FR-DELHI HO
- FR-DELHI 1

Receipt Period

From  To

[Get Statement](#)

## ONLINE DONATIONS

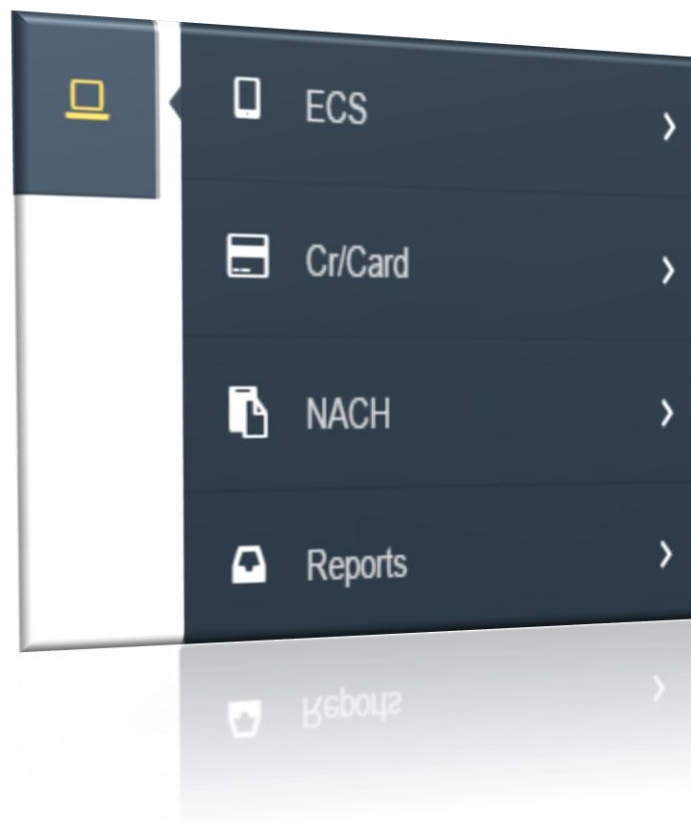
The processing of all the statements, documentation and other various donation functions performs in the “**Online Donations**” tab.

## MANAGE REGULAR DONOR

Different modules are displayed in this “**Manage Regular Donor**” option.

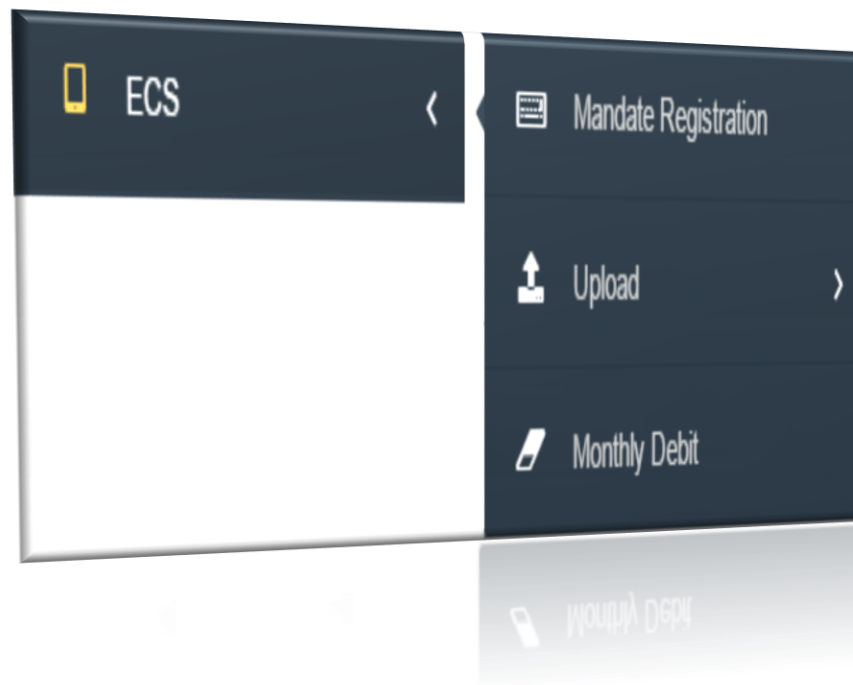
There are four different sub-categories modules :

- ECS
- Cr/Card
- NACH
- Reports



## ECS

*ECS is an electronic mode of payment / receipt for transactions that are repetitive and periodic in nature. ECS is used by institutions for making bulk payment of amounts towards distribution of dividend, interest, salary, pension, etc., or for bulk collection of amounts towards telephone / electricity / water dues, cess / tax collections, loan installment repayments, periodic Investment in mutual funds, insurance premium etc. Essentially, ECS facilitates bulk transfer of money from one bank account to many bank accounts or vice versa.*



There are three different sub-categories modules :

- Mandate Registration
- Upload
- Monthly Debit

## Mandate Registration

Fill all the required fields in the Donor Search(ECS/NACH Mandate) page and then press “**Search**” button to get the specified result.

**Donor Search(ECS/NACH Mandate)** Search Export Data

Donor	Donor ID	Title	Select Title	Code	MICR	IFSC	
Donor Name	First	Last		Bank Details	Bank Name	A/c Type	All
Customer	Unique ID	ECS Renewal	NO	Branch/City			
Form Number							
For Period	From	To		Name			
Pan No.							
A/c No.							
	Location 1	Country	All Country	State	All State		
	Location 2	City	All City	Contact No			
	Address	Address 1	Address 2				
	Email Address						



Search

After completion of “**Search**”, the specified donor list will show up, there are two operations that can be done through this record :

**Donor Search(ECS/NACH Mandate)** Search Export Data

**Donor List**

Show  entries Search:

SI No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Status	Contributions / Sponsorship	Transfer/Add
1	NCO/23	SOHIL BHAGAT Mobile No. :9711090175	NCO/1	SPORADIC DONORS	NEPHROPLUS, NEPHROCARE HEALTH SERVICES PRIVATE LIMITED., #1178, NEAR LOTUS POND , BESIDE RNR BANJAR HILLS ROAD NUMBER 12. INDIA	National	PAYING		

Showing 1 to 1 of 1 entries Previous **1** Next



displays the donor’s contribution details.



redirects to Mandate Registration page

# Upload

There are three different sub-categories modules :

- Mandate
- Transaction File
- History



# Mandate

Fill all the required fields in the “**Upload Mandate File**” tab in Upload New ECS/NACH Mandate page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

A screenshot of a web application window titled 'Upload New ECS/NACH Mandates'. The window has two tabs: 'Upload Mandate File' (selected) and 'Import Mandate Data'. The 'Upload Mandate File' tab contains the following fields:

- 'File Upload Date \*' with a text input field containing '20-Jun-2015'.
- 'New Mandate File \*' with a 'Choose File' button, the text 'No file chosen', and a note '(file format except only .csv)'.
- 'ECS/NACH Mandate File' with a dropdown menu showing 'Select File Name'.
- A link: 'Click here to download Excel Format.' with a download icon.

At the bottom right, there are two buttons: 'Upload File' (dark blue) and 'Delete File' (red). A legend at the bottom left indicates that an asterisk (\*) denotes a 'Required Field'.

Fill all the required fields in the “**Import Mandate Data**” tab in Upload New ECS/NACH Mandate page and then press “**Import Data**” button to import the specified data.

The screenshot shows a web application window titled "Upload New ECS/NACH Mandates". It has two tabs: "Upload Mandate File" and "Import Mandate Data", with the latter being active. The form contains the following fields:

- Entry Date \***: A text input field containing "20-Jun-2015".
- Operation Name \***: A dropdown menu with "Select Operation Name" selected.
- Mandate File \***: A dropdown menu with "Select File Name" selected.
- Mandate**: A group of dropdown menus including "Source", "Select Sc", "Sub Source", and "Select Sub S".
- Data Type \***: A dropdown menu with "ECS" selected.

At the bottom left, there is a legend: "\* Required Field". At the bottom right, there is a dark blue button labeled "Import Data".

## Transaction File

Fill all the required fields in the “**Upload File**” tab in Upload Transaction File page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

The screenshot shows a web application window titled "Upload Transaction File". It has two tabs: "Upload File" and "Issue Receipt", with the former being active. The form contains the following fields:

- File Upload Date \***: A text input field containing "20-Jun-2015".
- Success File \***: A file selection button labeled "Choose File" with the text "No file chosen" and a red note "(file format except only .csv)".
- ECS File**: A dropdown menu with "Select File Name" selected.

At the top right, there is a link: "Click here to download Excel Format." At the bottom left, there is a legend: "\* Required Field". At the bottom right, there are two buttons: "Upload File" (dark blue) and "Delete File" (red).



Fill all the required fields in the “**Issue Receipt**” tab in Upload Transaction File page and then press “**Issue Receipt**” button to issue the specified receipt.

**Upload Transaction File**

Upload File **Issue Receipt**

Receipt Date \* 20-Jun-2015 Year ID \* 2015

Add. Info Channel Select Channel Campaign Operation Name \* Select Operation Name

ECS Success File \* Select File Name Deposited Bank \* Select Bank

\* Required Field **Issue Receipt**

## History

Fill all the required fields in the “ECS Receipt Issue History” page and then press “**Get Statement**” button to get the specified statement.

**ECS Receipt Issue History**

Receipt Period

From To

**Get Statement**

## Monthly Debit

Fill all the required fields in the “ECS Monthly Debit” page and then press “**Get Statement**” button to get the specified statement.

**ECS Monthly Debit**

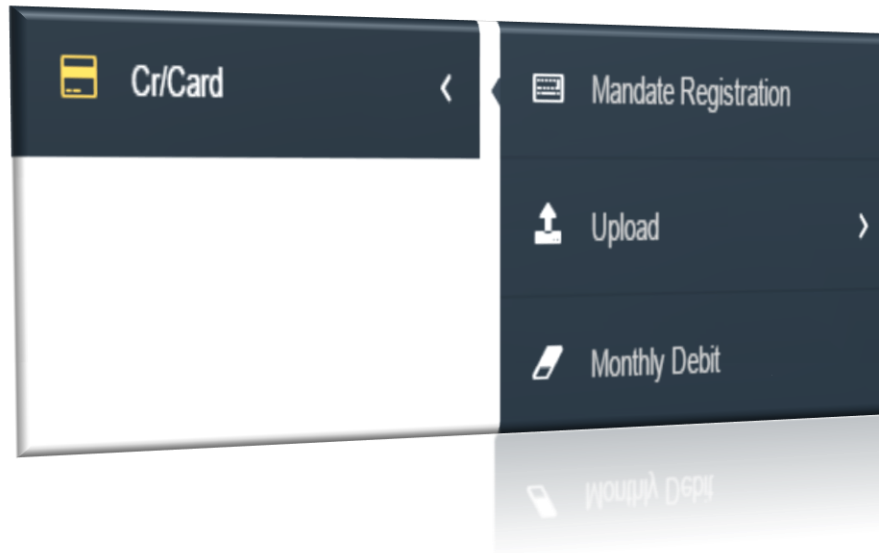
Debit Period From To Generate for \* Checking

Debit Pattern \* All Data For  Rejected NACH  All

SMS send \* Yes Process Through \* Tech Process

**Get Statement**

## Cr/Card



There are three different sub-categories modules :

- Mandate Registration
- Upload
- Monthly Debit

### Mandate Registration



Fill all the required fields in the Donor Search(Cr/Card Mandate) page and then press “**Search**” button to get the specified result.

**Donor Search(Cr/Card Mandate)** Search Export Data

<b>Donor</b>	ID	Title	Select Title ▾	<b>Bank Details</b>	Bank Name	A/c Type	All ▾			
<b>Donor Name</b>	First	Last		<b>Location 1</b>	Country	All Country ▾	State	All State ▾		
<b>Customer</b>	Unique ID	Cr Renewal	NO ▾	<b>Location 2</b>	City	All City ▾	Contact No			
<b>Card Number</b>								<b>Address</b>	Address 1	Address 2
<b>Effective Period</b>	From	To								

Search

After completion of “**Search**”, the specified donor list will show up, there are two operations that can be through this record :

Donor Search(Cr/Card Mandate)									
Donor List									
Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Status	Contributions / Sponsorship	Transfer/Add
1	NCO/23	SOHIL BHAGAT Mobile No. :9711090175	NCO/1	SPORADIC DONORS	NEPHROPLUS, NEPHROCARE HEALTH SERVICES PRIVATE LIMITED., #1178, NEAR LOTUS POND , BESIDE RNR BANJAR HILLS ROAD NUMBER 12. INDIA	National	PAYING		



displays the donor’s contribution details.

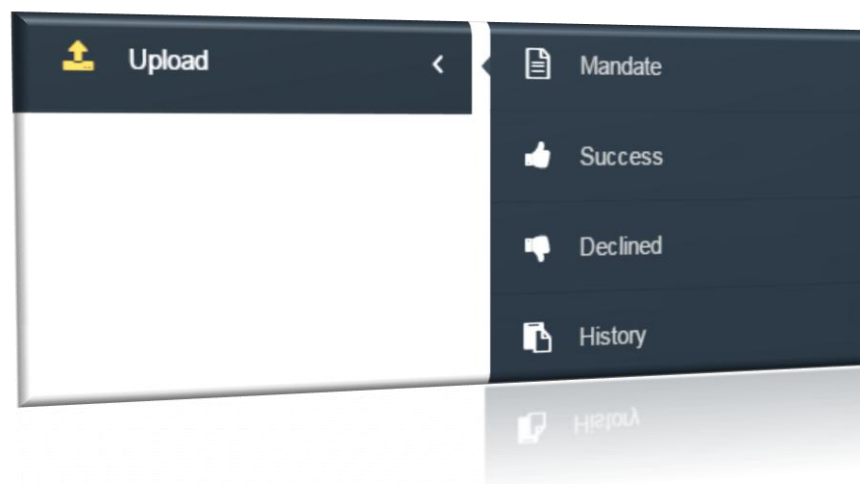


redirects to Mandate Registration page

## Upload

There are four different sub-categories modules :

- Mandate
- Success
- Declined
- History



# Mandate

Fill all the required fields in the “**Upload Mandate File**” tab in Upload New Credit Card Mandates page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file record.

The screenshot shows the 'Upload New Credit Card Mandates' page with the 'Upload Mandate File' tab selected. The page title is 'Upload New Credit Card Mandates'. Below the title are two tabs: 'Upload Mandate File' (active) and 'Import Mandate Data'. The 'Upload Mandate File' tab contains the following fields and controls:

- File Upload Date \***: A text input field containing '22-Jun-2015'.
- New Mandate File \***: A file selection control with a 'Choose File' button, the text 'No file chosen', and a red error message '(file format except only .csv)'. Below this is a 'Cr/Card Mandate File' dropdown menu with 'Select File Name' as the selected option.
- Click here to download Excel Format.**: A blue link with a download icon.
- \* Required Field**: A legend at the bottom left.
- Upload File** and **Delete File**: Two buttons at the bottom right.

Fill all the required fields in the “**Import Mandate Data**” tab in Upload New Credit Card Mandates page and then press “**Import Data**” button to import the specified data.

The screenshot shows the 'Upload New Credit Card Mandates' page with the 'Import Mandate Data' tab selected. The page title is 'Upload New Credit Card Mandates'. Below the title are two tabs: 'Upload Mandate File' and 'Import Mandate Data' (active). The 'Import Mandate Data' tab contains the following fields and controls:

- Entry Date \***: A text input field containing '22-Jun-2015'.
- Operation Name \***: A dropdown menu with 'Select Operation Name' as the selected option.
- Mandate File \***: A dropdown menu with 'Select File Name' as the selected option.
- Mandate**: A control with 'Source' and 'Sub Source' labels, and 'Select' and 'Select St' dropdown menus.
- Data Type \***: A dropdown menu with 'Cr/Card' as the selected option.
- \* Required Field**: A legend at the bottom left.
- Import Data**: A button at the bottom right.

## Success

Fill all the required fields in the “**Upload File**” tab in Upload Success Mandates page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

The screenshot shows the 'Upload Success Mandates' page with the 'Upload File' tab selected. The page title is 'Upload Success Mandates' with a close button (X) and a menu icon. The 'Upload File' tab is active, and the 'Issue Receipt' tab is also visible. The form contains the following fields and controls:

- File Upload Date \***: A text input field containing '22-Jun-2015'.
- Success File \***: A file selection button labeled 'Choose File' with the text 'No file chosen' and a note '(file format except only .csv)' below it.
- Cr/Card Success File**: A dropdown menu labeled 'Select File Name'.
- Link**: A blue link with a download icon that says 'Click here to download Excel Format.'
- Legend**: A small asterisk icon followed by the text '\* Required Field'.
- Buttons**: Two buttons at the bottom right: 'Upload File' (dark blue) and 'Delete File' (red).

Fill all the required fields in the “**Issue Receipt**” tab in Upload Success Mandates page and then press “**Issue Receipt**” button to issue the specified receipt.

The screenshot shows the 'Upload Success Mandates' page with the 'Issue Receipt' tab selected. The page title is 'Upload Success Mandates' with a close button (X) and a menu icon. The 'Issue Receipt' tab is active, and the 'Upload File' tab is also visible. The form contains the following fields and controls:

- Receipt Date \***: A text input field containing '22-Jun-2015'.
- Year ID \***: A dropdown menu containing '2015'.
- Add. Info**: A section with two sub-sections: 'Channel' with a dropdown menu 'Select Channel' and 'Campaign' with a dropdown menu 'Select Campaign'.
- Operation Name \***: A dropdown menu labeled 'Select Operation Name'.
- Cr/Card Success File \***: A dropdown menu labeled 'Select File Name'.
- Deposited Bank \***: A dropdown menu labeled 'Select Bank'.
- Legend**: A small asterisk icon followed by the text '\* Required Field'.
- Button**: A dark blue button labeled 'Issue Receipt' at the bottom right.

# Declined

Fill all the required fields in the “**Upload File**” tab in Upload Declined Mandates page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

### Upload Declined Mandates

Upload File Import Declined Data

**File Upload Date \***  [Click here to download Excel Format.](#)

**Success File \***  No file chosen  
(file format except only .csv)

**Cr/Card Declined File**

\* Required Field Upload File Delete File

Fill all the required fields in the “**Import Declined Data**” tab in Upload Declined Mandates page and then press “**Import Data**” button to import the specified data.

### Upload Declined Mandates

Upload File Import Declined Data

**Declined Date \***  **Year ID \***

**Cr/Card Declined File \***  **SMS send \***

\* Required Field Import Data

# History

Fill all the required fields in the “Cr/Card Receipt Issue History” page and then press “**Get Statement**” button to get the specified statement.

### Cr/Card Receipt Issue History

Receipt Period

From  To

 Get Statement

# Monthly Debit

Fill all the required fields in the “Cr/Card Monthly Debit” page and then press “**Get Statement**” button to get the specified statement.


### Cr/Card Monthly Debit

Debit Period  From  To

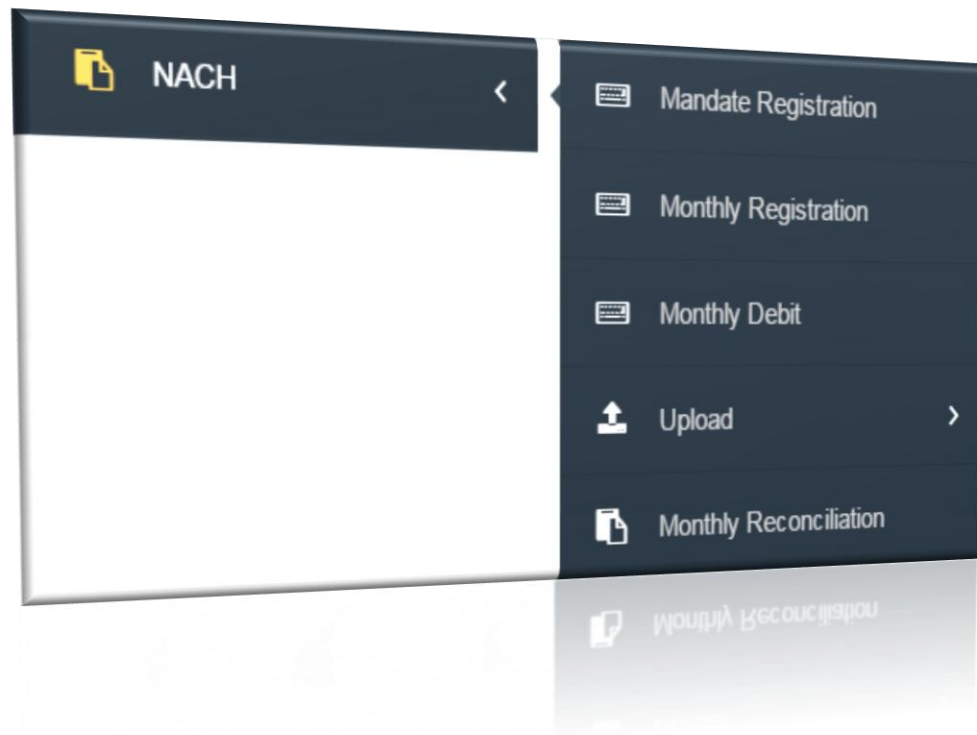
Generate for \*

Debit Pattern \*

SMS send \*

 Get Statement

# NACH



There are five different sub-categories modules :

- Mandate Registration
- Monthly Registration
- Monthly Debit
- Upload
- Monthly Reconciliation

## Mandate Registration

Fill all the required fields in the Donor Search(ECS/NACH Mandate) page and then press “**Search**” button to get the specified result.



**Donor Search(ECS/NACH Mandate)** Search Export Data

Donor: Donor ID  Title  Select Title   
 Donor Name: First  Last   
 Customer: Unique ID  ECS Renewal  NO   
 Form Number   
 For Period: From  To   
 Pan No.   
 A/c No.

Code: MICR  IFSC   
 Bank Details: Bank Name  A/c Type  All   
 Branch/City   
 Name   
 Location 1: Country  All Country  State  All State   
 Location 2: City  All City  Contact No   
 Address: Address 1  Address 2   
 Email Address



Search

After completion of “**Search**”, the specified donor list will show up, there are two operations that can be done through this record :

**Donor Search(ECS/NACH Mandate)** Search Export Data

**Donor List**

Show  entries Search:

Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Status	Contributions / Sponsorship	Transfer/Add
1	NCO/23	SOHIL BHAGAT Mobile No. :9711090175	NCO/1	SPORADIC DONORS	NEPHROPLUS, NEPHROCARE HEALTH SERVICES PRIVATE LIMITED., #1178, NEAR LOTUS POND , BESIDE RNR BANJAR HILLS ROAD NUMBER 12. INDIA	National	PAYING		

Showing 1 to 1 of 1 entries Previous **1** Next



displays the donor’s contribution details.




redirects to Mandate Registration page.

## Mandate Registration

Fill all the required fields in the “NACH Monthly Registration” page and then press “**Get Statement**” button to get the specified statement.

### NACH Monthly Registration

Registration Period	From <input type="text"/> To <input type="text"/>	Generate for *	Checking <input type="text"/>
Registration Pattern *	All <input type="text"/>	SMS send *	Yes <input type="text"/>


 Get Statement

## Mandate Registration

Fill all the required fields in the “NACH Monthly Registration” page and then press “**Get Statement**” button to get the specified statement.

### NACH Monthly Debit

Debit Period	From <input type="text"/> To <input type="text"/>	Generate for *	Checking <input type="text"/>
Debit Pattern *	All <input type="text"/>	SMS send *	Yes <input type="text"/>

 Get Statement

# Upload

There are three different sub-categories modules :

- New Mandate
- Verification Mandate
- Transaction File



## New Mandate

Fill all the required fields in the **“Upload Mandate File”** tab in Upload New ECS/NACH Mandates page and then press **“Upload File”** button to upload the specified file or press **“Delete File”** button to delete the specified file record.

**Upload New ECS/NACH Mandates**

**Upload Mandate File** | Import Mandate Data

**File Upload Date \***  [Click here to download Excel Format.](#)

**New Mandate File \***  No file chosen **ECS/NACH Mandate File**

(file format except only .csv)

\* Required Field

Fill all the required fields in the “**Import Mandate Data**” tab in Upload New ECS/NACH Mandates page and then press “**Import Data**” button to import the specified data.

**Upload New ECS/NACH Mandates**

Upload Mandate File **Import Mandate Data**

**Entry Date \*** 23-Jun-2015 **Mandate** Source Select Sub Source Select St

**Operation Name \*** Select Operation Name **Data Type \*** ECS

**Mandate File \*** Select File Name

\* Required Field **Import Data**

## Verification Mandate

Fill all the required fields in the “**Upload File**” tab in Upload NACH Verification Mandates page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

**Upload NACH Verification Mandates**

**Upload File** Import Data

**File Upload Date \*** 23-Jun-2015 [Click here to download Excel Format.](#)

**Success File \*** Choose File No file chosen (file format except only .csv) **NACH Success File** Select File Name

\* Required Field **Upload File** **Delete File**

Fill all the required fields in the “**Import Data**” tab in Upload NACH Verification Mandates page and then press “**Import Record**” button to issue the specified receipt.

### Upload NACH Verification Mandates

Upload File **Import Data**

Entry Date \*  NACH Success File \*

\* Required Field Import Record

## Transaction File

Fill all the required fields in the “**Upload File**” tab in Upload Transaction File page and then press “**Upload File**” button to upload the specified file or press “**Delete File**” button to delete the specified file.

### Upload Transaction File

**Upload File** Issue Receipt

File Upload Date \*  [Click here to download Excel Format.](#)

Success File \*  No file chosen ECS File

(file format except only .csv)

\* Required Field Upload File Delete File

Fill all the required fields in the “**Issue Receipt**” tab in Upload Transaction File page and then press “**Issue Receipt**” button to import the specified data.

### Upload Transaction File

Upload File **Issue Receipt**

Receipt Date *	<input type="text" value="23-Jun-2015"/>	Year ID *	<input type="text" value="2015"/>	
Add. Info	Channel <input type="text" value="Select Channel"/>	Campaign <input type="text" value=""/>	Operation Name *	<input type="text" value="Select Operation Name"/>
	ECS Success File *	<input type="text" value="Select File Name"/>	Deposited Bank *	<input type="text" value="Select Bank"/>

\* Required Field **Issue Receipt**

## Monthly Reconciliation

Fill all the required fields in the “NACH Monthly Reconciliation” page and then press “**Get Statement**” button to get the specified statement.

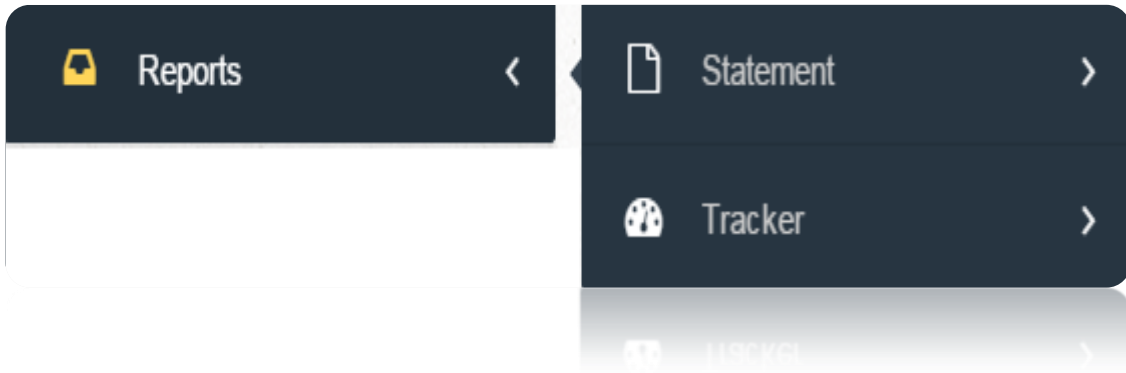
### NACH Monthly Reconciliation

Period	From <input type="text"/>	To <input type="text"/>	Generate for	<input type="text" value="Checking"/>
--------	---------------------------	-------------------------	--------------	---------------------------------------

**Get Statement**

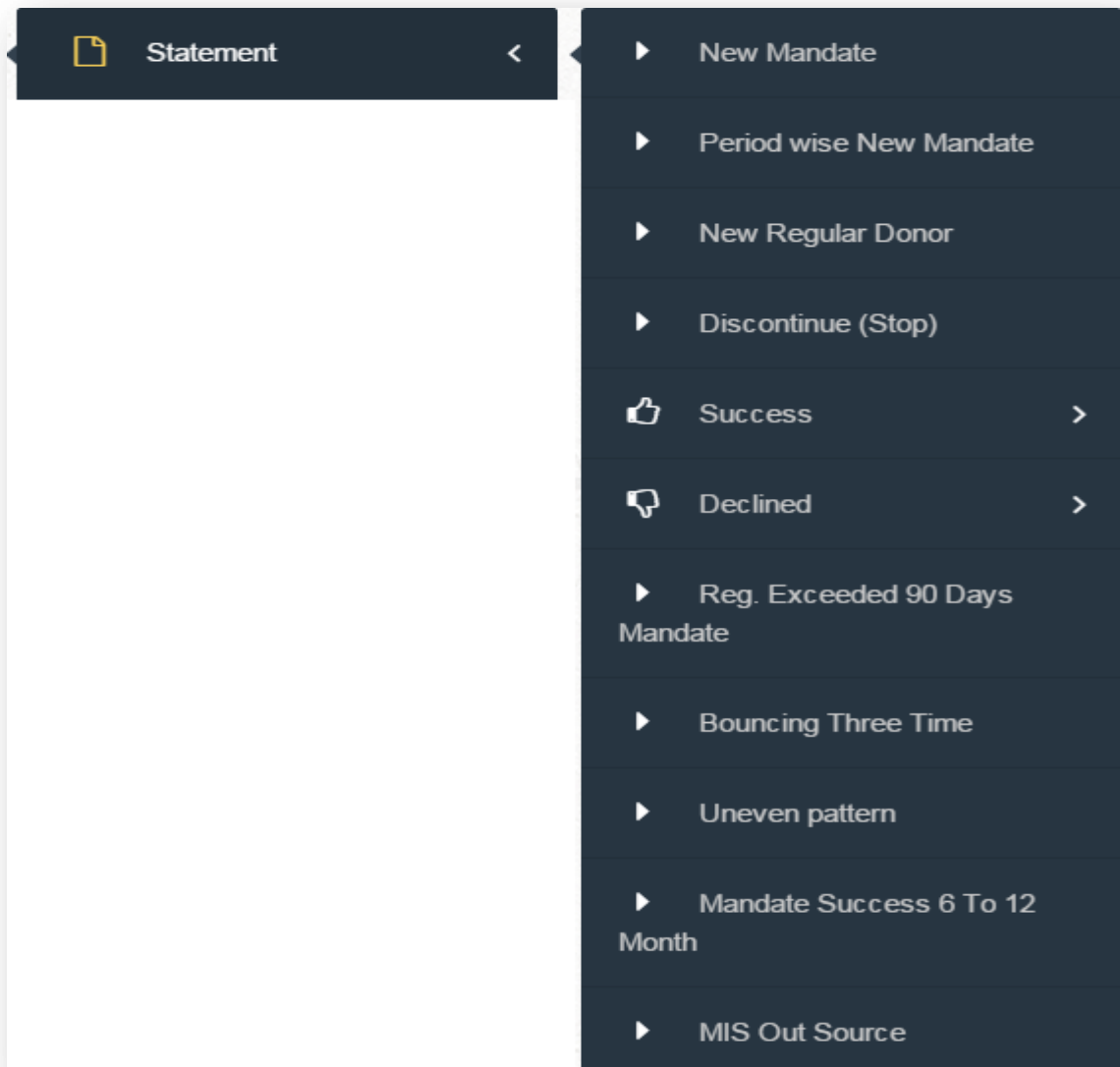
# REPORTS

There are two modules in Reports :



## 1) Statement

There are 11 sub-category modules in Statement option.



## New Mandate


Fill all the required fields in the “New Registration Mandate” page and then press “**Get Statement**” button to get the specified statement.

### New Registered Mandate

Agency Name: All Agency Name

Period: Month January Year 2015

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2



## Period Wise New Mandate

Fill all the required fields in the “Period wise New Registration Mandate” page and then press “**Get Statement**” button to get the specified statement.


### Period wise New Registered Mandate

Agency Name: All Agency Name

Start Period: From To

Entry Period: From To

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2





## New Regular Donor

Fill all the required fields in the “New Regular Donor” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "New Regular Donor". It contains several input fields: "Operation Name" with a dropdown menu listing "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI"; "Channel" with a dropdown menu listing "All Channel", "CROWDFUNDING PORTAL", "DIRECT MAIL", "DONATION BOX", and "DDP"; "Agency Name" with a dropdown menu listing "All Agency Name"; "Joining Period" with "From" and "To" date input fields; and "Campaign Code" with a dropdown menu listing "HD151130TX", "MD152130N1", "TD153120TY", "RD153131RM", "RC154130S1", "MD155130N2", and "DD155130N1". A green "Get Statement" button is located at the bottom right of the form.

## Discontinue (Stop)

Fill all the required fields in the “Discontinue Regular Donor” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "Discontinue Regular Donor". It contains several input fields: "Operation Name" with a dropdown menu listing "All Operation", "FR-AHEMDABAD", "FR-BANGALORE", "FR-DELHI HO", and "FR-DELHI"; "Channel" with a dropdown menu listing "All Channel", "CROWDFUNDING PORTAL", "DIRECT MAIL", "DONATION BOX", and "DDP"; "Agency Name" with a dropdown menu listing "All Agency Name"; "Stop Period" with "From" and "To" date input fields; "End Period" with "From" and "To" date input fields; and "Campaign Code" with a dropdown menu listing "HD151130TX", "MD152130N1", "TD153120TY", "RD153131RM", "RC154130S1", "MD155130N2", and "DD155130N1". A green "Get Statement" button is located at the bottom right of the form.

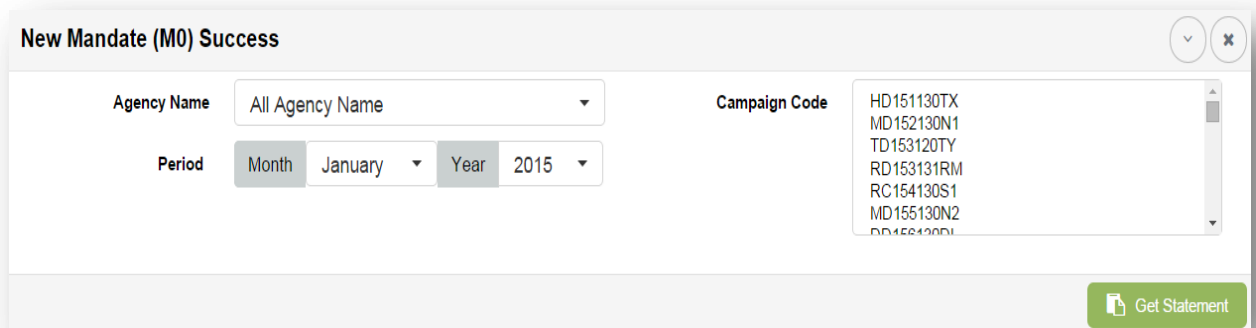
## Success

There are two sub-category modules in “Success” option.



## New ECS(M0)

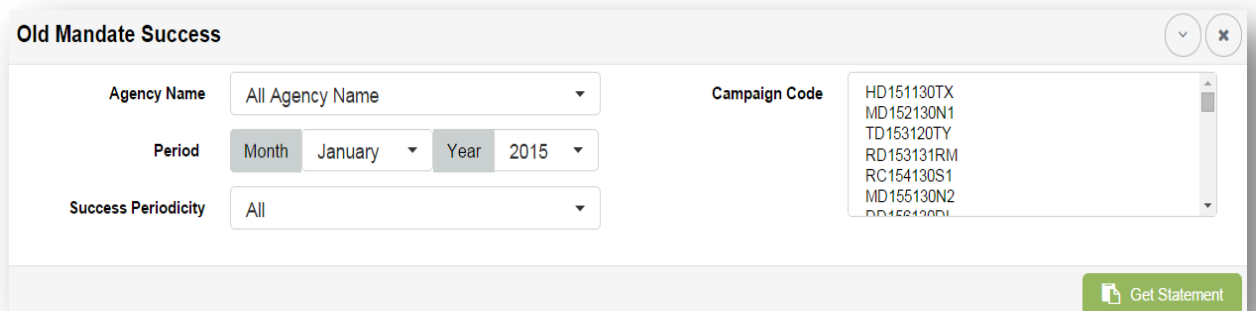
Fill all the required fields in the “New Mandate(M0) Success” page and then press “**Get Statement**” button to get the specified statement.

A form titled "New Mandate (M0) Success" with a close button in the top right. It contains the following fields:

- Agency Name: A dropdown menu with "All Agency Name" selected.
- Period: Two dropdown menus, "Month" with "January" selected and "Year" with "2015" selected.
- Campaign Code: A list box containing the following codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, and DD155130N1.
- Get Statement: A green button with a document icon and the text "Get Statement".

## Old ECS

Fill all the required fields in the “Old Mandate Success” page and then press “**Get Statement**” button to get the specified statement.

A form titled "Old Mandate Success" with a close button in the top right. It contains the following fields:

- Agency Name: A dropdown menu with "All Agency Name" selected.
- Period: Two dropdown menus, "Month" with "January" selected and "Year" with "2015" selected.
- Success Periodicity: A dropdown menu with "All" selected.
- Campaign Code: A list box containing the following codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, and DD155130N1.
- Get Statement: A green button with a document icon and the text "Get Statement".

# Declined

There are three sub-category modules in “Declined” option.



## New Mandate (M0)

Fill all the required fields in the “New Mandate Declined” page and then press “**Get Statement**” button to get the specified statement.

A screenshot of a web form titled 'New Mandate Declined'. The form has a light gray background and a white content area. It contains several input fields: 'Agency Name' with a dropdown menu showing 'All Agency Name'; 'Campaign Code' with a list box containing codes like 'HD151130TX', 'MD152130N1', 'TD153120TY', 'RD153131RM', 'RC154130S1', 'MD155130N2', and 'DD155130N1'; 'Period' with two dropdowns for 'Month' (showing 'January') and 'Year' (showing '2015'); and 'Declined Reson' with a dropdown menu showing 'All'. A green button with a document icon and the text 'Get Statement' is located at the bottom right of the form.

## Old Mandate

Fill all the required fields in the “Old Mandate Declined” page and then press “**Get Statement**” button to get the specified statement.


A screenshot of a web form titled 'Old Mandate Declined'. The form has a light gray background and a white content area. It contains several input fields: 'Agency Name' with a dropdown menu showing 'All Agency Name'; 'Campaign Code' with a list box containing codes like 'HD151130TX', 'MD152130N1', 'TD153120TY', 'RD153131RM', 'RC154130S1', 'MD155130N2', and 'DD155130N1'; 'Period' with two dropdowns for 'Month' (showing 'January') and 'Year' (showing '2015'); 'Declined Reson' with a dropdown menu showing 'All'; and 'Declined Periodicity' with a dropdown menu showing 'All'. A green button with a document icon and the text 'Get Statement' is located at the bottom right of the form.

## All Mandate

Fill all the required fields in the “All Mandate Declined” page and then press “**Get Statement**” button to get the specified statement.

### All Mandate Declined

Agency Name	All Agency Name	Campaign Code	HD151130TX MD152130N1 TD153120TY RD153131RM RC154130S1 MD155130N2 DD156130N1
Period	Month January Year 2015		
Declined Reson	All		
Declined Periodicity	All		




## Reg. Exceeding 90 Days Mandate

Fill all the required fields in the “Reg. Exceeding 90 Days Mandate” page and then press “**Get Statement**” button to get the specified statement.

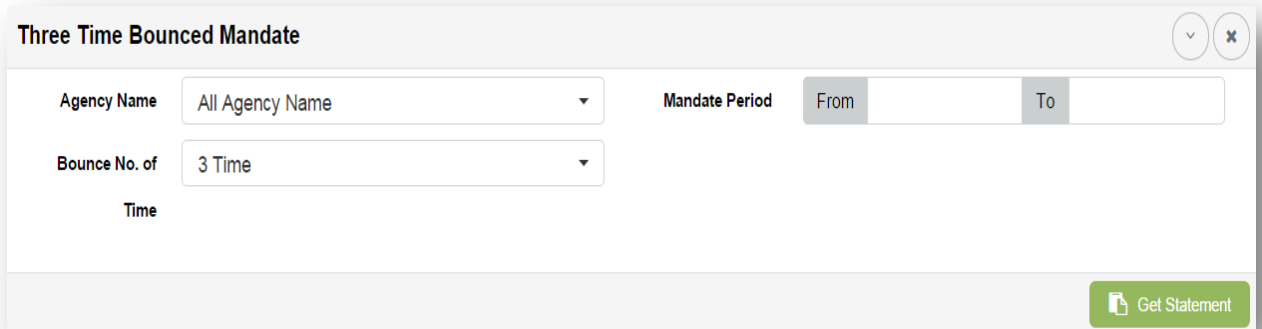
### Registration Exceeded 90 Days Mandate

Agency Name	All Agency Name	Mandate Period	From To
-------------	-----------------	----------------	---------



## Bouncing Three Time

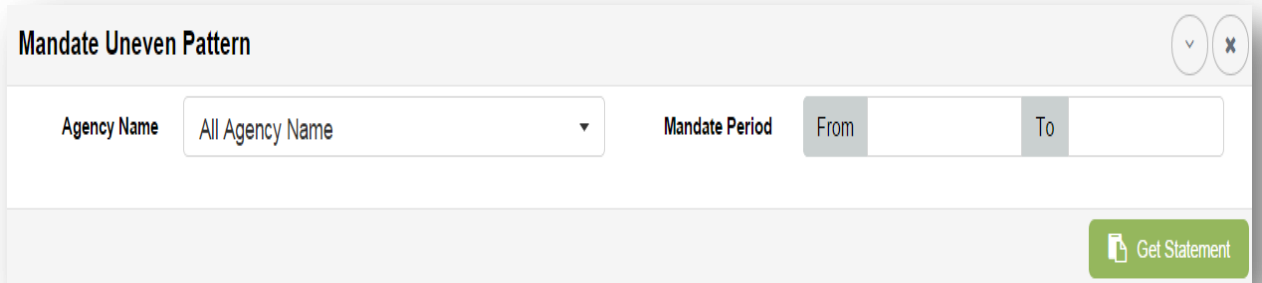
Fill all the required fields in the “Three Time Bounced Mandate” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Three Time Bounced Mandate". It features a header bar with a dropdown arrow and a close button (X). The form contains two rows of input fields. The first row has "Agency Name" with a dropdown menu showing "All Agency Name" and "Mandate Period" with "From" and "To" date pickers. The second row has "Bounce No. of Time" with a dropdown menu showing "3 Time". A green "Get Statement" button is located at the bottom right of the form.

## Uneven Pattern

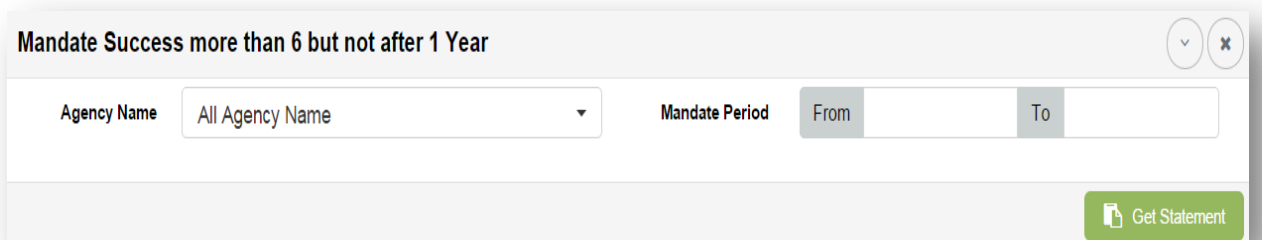
Fill all the required fields in the “Three Time Bounced Mandate” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Mandate Uneven Pattern". It features a header bar with a dropdown arrow and a close button (X). The form contains two rows of input fields. The first row has "Agency Name" with a dropdown menu showing "All Agency Name" and "Mandate Period" with "From" and "To" date pickers. The second row is empty. A green "Get Statement" button is located at the bottom right of the form.

## Mandate Success 6 to 12 Month

Fill all the required fields in the “Mandate Success more than ^ but not after 1 Year” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Mandate Success more than 6 but not after 1 Year". It features a header bar with a dropdown arrow and a close button (X). The form contains two rows of input fields. The first row has "Agency Name" with a dropdown menu showing "All Agency Name" and "Mandate Period" with "From" and "To" date pickers. The second row is empty. A green "Get Statement" button is located at the bottom right of the form.

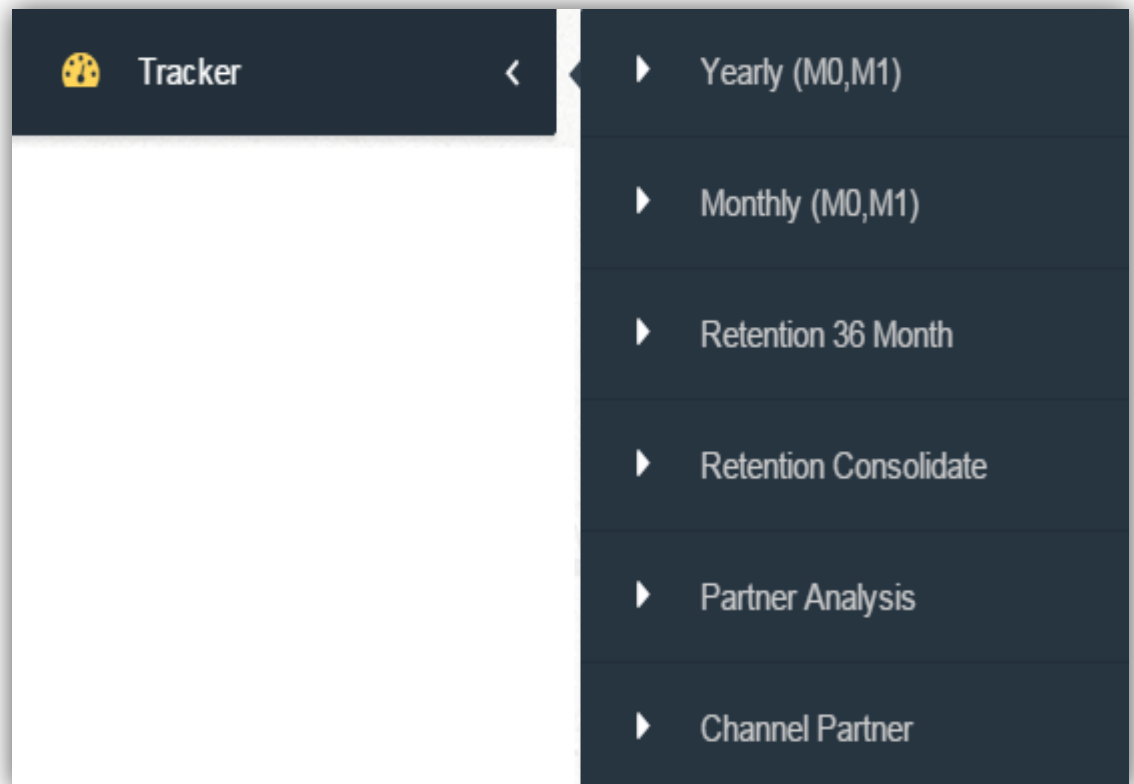
## MIS Out Source

Fill all the required fields in the “MIS Out Source” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "MIS Out Source". It contains several input fields and a button. On the left, there are three dropdown menus labeled "Onetime Campaign", "Online Campaign", and "Regular Campaign". Each dropdown menu contains a list of alphanumeric codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, and DD156130DL. To the right of these dropdowns is a "MIS Period" section with "From" and "To" input fields. At the bottom right of the form is a green button labeled "Get Statement".

## 2) Tracker

There are six sub-category modules in “Tracker” option.



## Yearly ( M0,M1)

Fill all the required fields in the “Mandate Year Tracker” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "Mandate Year Tracker (M1,M2,etc...)". It features three main input fields: "Operation Name" with a dropdown menu showing options like "All Operation", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2"; "Year" with a dropdown menu set to "2015"; and "Agency Name" with a dropdown menu set to "All Agency Name". A green "Get Statement" button is located at the bottom right of the form.

## Monthly (M0,M1)

Fill all the required fields in the “Mandate Monthly Tracker” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "Mandate Monthly Tracker (M1,M2,etc...)". It features four main input fields: "Operation Name" with a dropdown menu showing options like "All Operation", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2"; "Period" with a dropdown menu set to "Month" and a sub-menu set to "January"; "Year" with a dropdown menu set to "2015"; and "Campaign Code" with a dropdown menu showing options like "HD151130TX", "MD152130N1", "TD153120TY", "RD153131RM", "RC154130S1", and "MD155130N2". A green "Get Statement" button is located at the bottom right of the form.

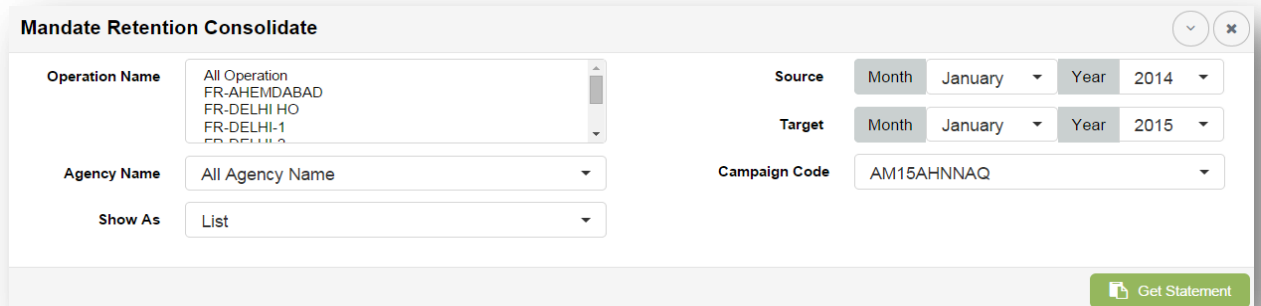
## Retention 36 Month

Fill all the required fields in the “Mandate 36 Months Retention Tracker” page and then press “**Get Statement**” button to get the specified statement.

The screenshot shows a web form titled "Mandate 36 Months Retention Tracker (M1,M2,etc...)". It features four main input fields: "Operation Name" with a dropdown menu showing options like "All Operation", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2"; "Source" with a dropdown menu set to "Month" and a sub-menu set to "January"; "Year" with a dropdown menu set to "2014"; "Target" with a dropdown menu set to "Month" and a sub-menu set to "January"; "Year" with a dropdown menu set to "2015"; and "Campaign Code" with a dropdown menu set to "AM15AHNNAQ". A green "Get Statement" button is located at the bottom right of the form.

## Retention Consolidated

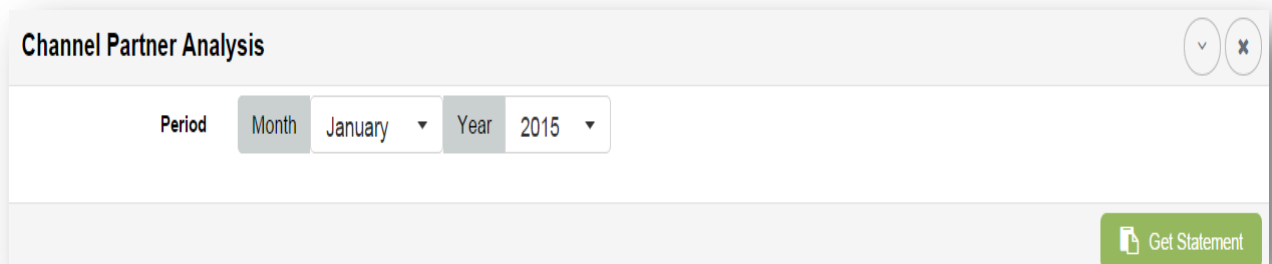
Fill all the required fields in the “Mandate Retention Consolidate” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Mandate Retention Consolidate". It contains several input fields: "Operation Name" with a list of options including "All Operation", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2"; "Agency Name" with the option "All Agency Name"; "Show As" with the option "List"; "Source" with "Month" selected and "January" and "2014" as sub-options; "Target" with "Month" selected and "January" and "2015" as sub-options; and "Campaign Code" with the value "AM15AHNNAQ". A green "Get Statement" button is located at the bottom right.

## Partner Analysis

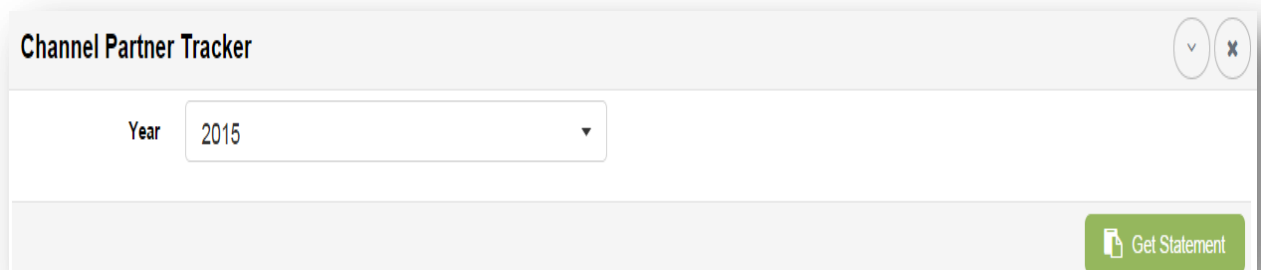
Fill all the required fields in the “Channel Partner Analysis” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Channel Partner Analysis". It features a "Period" section with "Month" selected and "January" and "2015" as sub-options. A green "Get Statement" button is positioned at the bottom right.

## Channel Partner

Fill all the required fields in the “Channel Partner Tracker” page and then press “**Get Statement**” button to get the specified statement.



The screenshot shows a web form titled "Channel Partner Tracker". It includes a "Year" field with the value "2015" selected. A green "Get Statement" button is located at the bottom right.



## TRANSFER & ALLOCATION

Different modules of transfer, transactions and allocation are displayed in this “**Transfer & Allocation**” option.



There are four different sub-categories modules :

- Operation Allocation
- Single Transfer
- Group Transfer
- Reports

## Operation Allocation

Fill all the required fields in the “Search to Allocate Receipt” page and then press “**Search**” button to get the specified record.

### Search to Allocate Receipt

Search Export Data

Year ID	All Year	Add Info.	Vertical	All Vertical	Product	All product
Donor ID		Pay Mode	All			
Receipt No.		Cheque Number				
Operation	All Operation	Dated				
Issue	From	Bank	To			

Search

## Single Transfer

Fill all the required fields in the “Search to Transfer Receipt Vertical to Vertical” page and then press “**Search**” button to get the specified record.

### Search to Transfer Receipt Vertical to Vertical

Search Export Data

Year ID	All Year	Add Info.	Vertical	All Vertical	Product	All product
Donor ID		Pay Mode	All			
Receipt No.		Cheque Number				
Operation	All Operation	Dated				
Issue	From	Bank	To			

Search

S No	Year ID	Donor ID	Operation ID	Product Type	Receipt No	Receipt Date	Amount	Transfer	Reverse
1.	2015	NCO/23	NCO/1	SPORADIC DONORS	NCO/1/2015/25	15-May-2015	5000.00		

There are two operations that have different functions:



To transfer the receipt.



Reverse the receipt and transfer process is not done.

## Group Transfer

Fill all the required fields in the “Group Receipt Transfer” page and then press “**Save**” button to save the details.

Group Receipts Transfer

Group Name: Select Group

Receipt Transfer Details

Vertical To: Select Vertical

Add. Info. Product: Select Product Type Purpose: Select Purpose

Add. Info. Channel: Nothing selected Campaign: Nothing selected

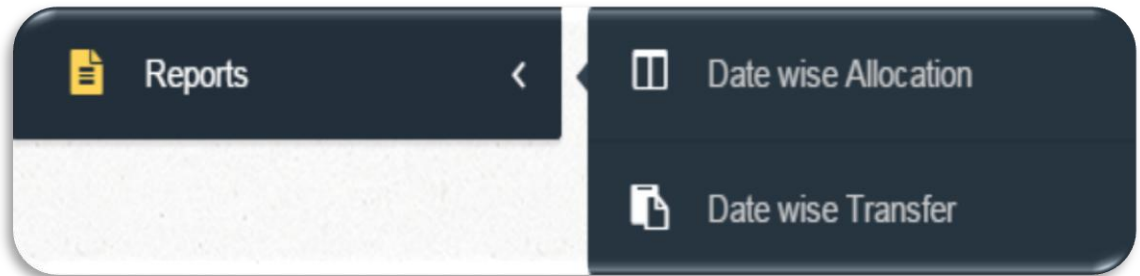
Transfer From: Vertical: Select Vertical Year: 2015

Receipt Period: From To

Save Delete

To delete the specified record press the “**Delete**” button.

# Reports




## Date Wise Allocation

Fill all the required fields in the “Date wise Allocation Statement” page and then press “**Get Statement**” button to get the specified statement.

### Date wise Allocation Statement

<b>Operation Name</b>	All Operation FR-AHEMDABAD FR-BANGALORE FR-DELHI HO FR-DELHI 4	<b>Purpose</b>	All Purpose EDUCATION GENERAL DONATION HEALTH HUMANITARIAN AND DIS
<b>Receipt</b>	From <input type="text"/> To <input type="text"/>	<b>Year ID</b>	2015
<b>Add. Criteria 1</b>	Vertical All Product All	<b>Campaign Code</b>	HD151130TX MD152130N1 TD153120TY RD153131RM RC154130S1 MD155130N2 DD156120DL
<b>Channel</b>	All Channel CROWDFUNDING PORTAL DIRECT MAIL DONATION BOX DDTY		
<b>Receipt Range</b>	<input type="radio"/> Less Than 1 Lac <input type="radio"/> Greater Than 1 Lac <input checked="" type="radio"/> All		



## Date Wise Transfer

Fill all the required fields in the “Date wise Transfer Statement” page and then press “**Get Statement**” button to get the specified statement.

### Date wise Transfer Statement

**Operation Name** All Operation  
FR-AHEMDABAD  
FR-BANGALORE  
FR-DELHI HO  
FR-DELHI 1

**Purpose** All Purpose  
EDUCATION  
GENERAL DONATION  
HEALTH  
HUMANITARIAN AND RDD

**Receipt** From To

**Year ID** 2015

**Add. Criteria 1** Vertical All Product All

**Campaign Code** HD151130TX  
MD152130N1  
TD153120TY  
RD153131RM  
RC154130S1  
MD155130N2  
DD156130DL

**Channel** All Channel  
CROWDFUNDING PORTAL  
DIRECT MAIL  
DONATION BOX  
DDTV

**Receipt Range**  Less Than 1 Lac  Greater Than 1 Lac  All

[Get Statement](#)

## **CLAW BACK & COMMISSION**

Money or benefits that are distributed and then taken back as a result of special circumstances is refer as Claw back.

Different modules of claw back and commission are displayed in this “**Claw Back & Commision**” option.



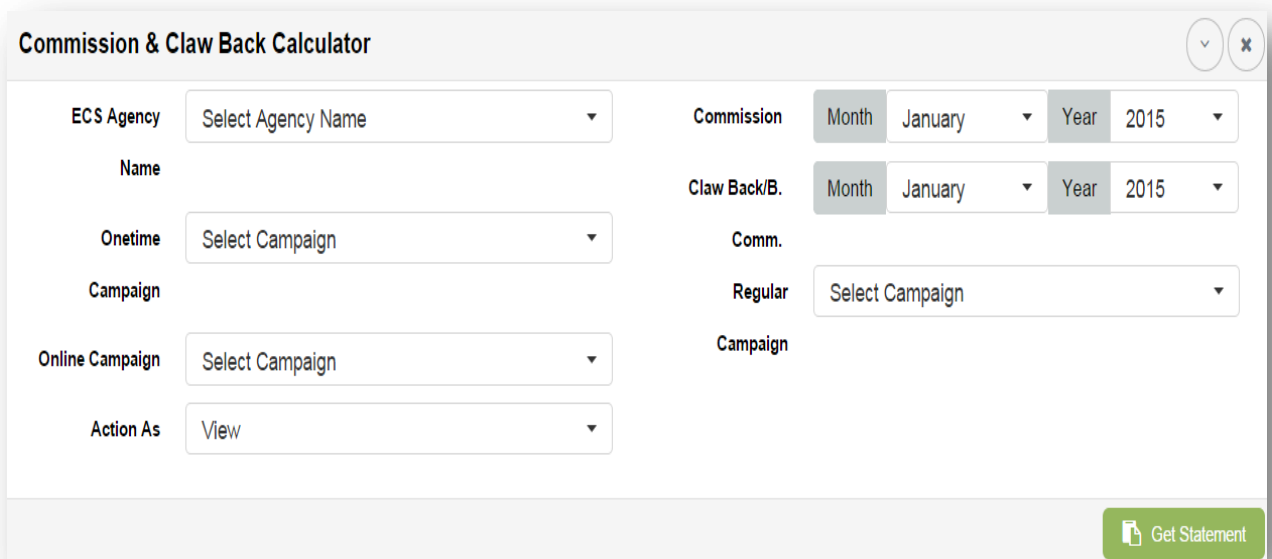
There are three different sub-categories modules :

- Commission & Claw Back
- Print Comm./Claw Back
- Consolidated Comm./Claw Back

## Commission & Claw Back

Fill all the required fields in the “Commission & Claw Back Calculator” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to calculate the amount that needs to be given as Commission and taken back as Claw back.



The screenshot shows a web form titled "Commission & Claw Back Calculator". The form is organized into two columns. The left column contains fields for "ECS Agency Name" (a dropdown menu with "Select Agency Name"), "Onetime Campaign" (a dropdown menu with "Select Campaign"), "Online Campaign" (a dropdown menu with "Select Campaign"), and "Action As" (a dropdown menu with "View"). The right column contains fields for "Commission" (a date selector with "Month" set to "January" and "Year" set to "2015"), "Claw Back/B." (a date selector with "Month" set to "January" and "Year" set to "2015"), "Comm." (a dropdown menu with "Select Campaign"), and "Regular Campaign" (a dropdown menu with "Select Campaign"). At the bottom right of the form is a green button labeled "Get Statement".

## Print Comm./Claw Back

Fill all the required fields in the “Commission & Claw Back Printing” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to print the statement of Commission and Claw back.

The screenshot shows a web form titled "Commission & Claw Back Printing". It features a header with a close button (X) and a dropdown arrow (v). The form contains the following fields: "ECS Agency" with a dropdown menu showing "Select Agency Name"; "Name" with a text input field; "Action As" with a dropdown menu showing "Claw Back/Commission Regular Donor"; and "Printing" with two dropdown menus for "Month" (set to "January") and "Year" (set to "2015"). A green button labeled "Get Statement" with a document icon is located at the bottom right.

## Consolidated Comm./Claw Back

Fill all the required fields in the “Consolidated Commission/Claw Back” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to consolidate the commission and claw back.

The screenshot shows a web form titled "Consolidated Commission/Claw Back". It features a header with a close button (X) and a dropdown arrow (v). The form contains the following fields: "ECS Agency" with a dropdown menu showing "Select Agency Name"; "Name" with a text input field; "Month" with a dropdown menu showing "January"; and "Year" with a dropdown menu showing "2015". A green button labeled "Get Statement" with a document icon is located at the bottom right.



## MIS REPORTS

Management information system, or MIS, broadly refers to a system that provides the tools to organize, evaluate and efficiently manage departments within an organization. In order to provide past, present and prediction information, a management information system can include software that helps in decision making, data resources such as databases, the hardware resources of a system, decision support systems, people management and project management applications, and any computerized processes that enable the department to run efficiently.

Different modules of Management Information System are displayed in this “**MIS Reports**” option.



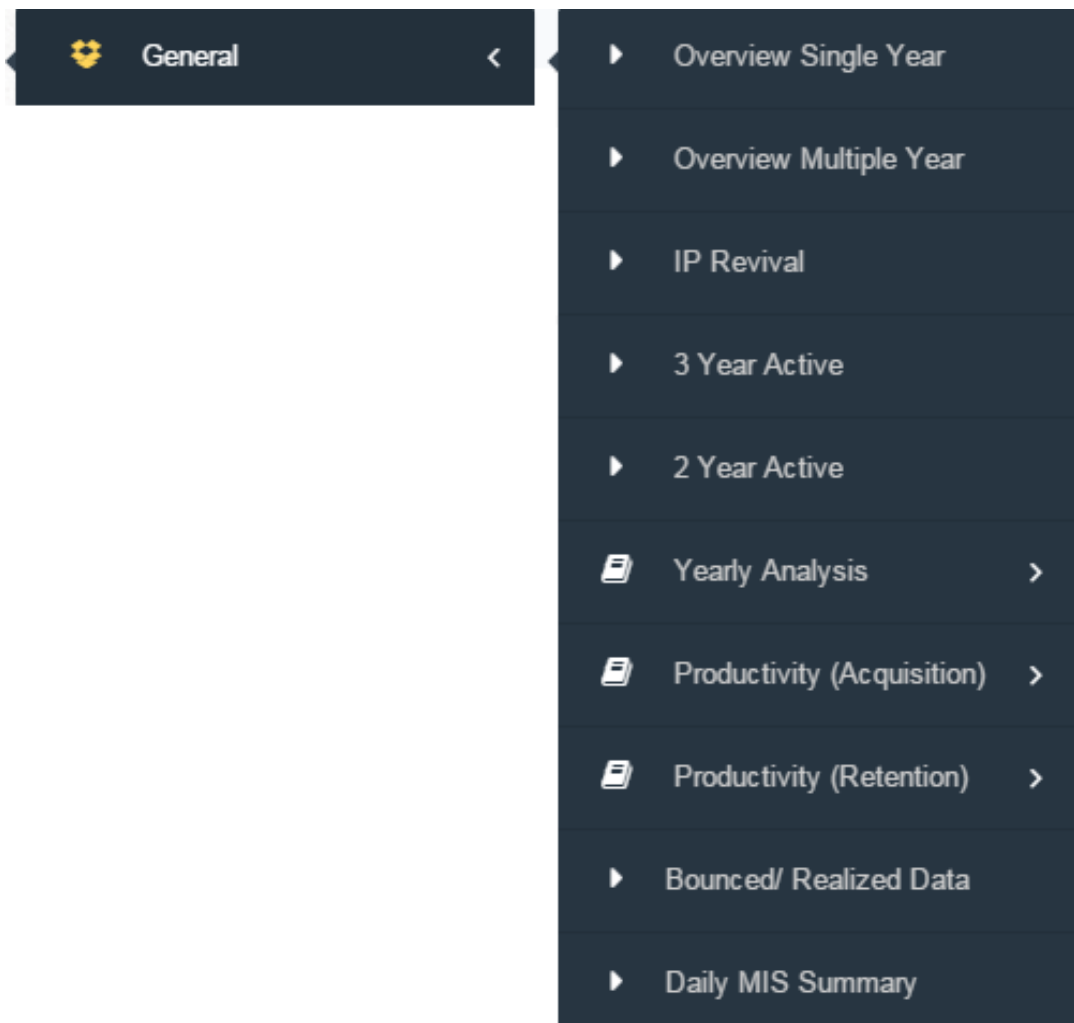
There are three sub-categories modules in MIS:

- General
- Individual Partner
- Corporate Partner

## General

This includes overview reports of general summary & data of the information system.

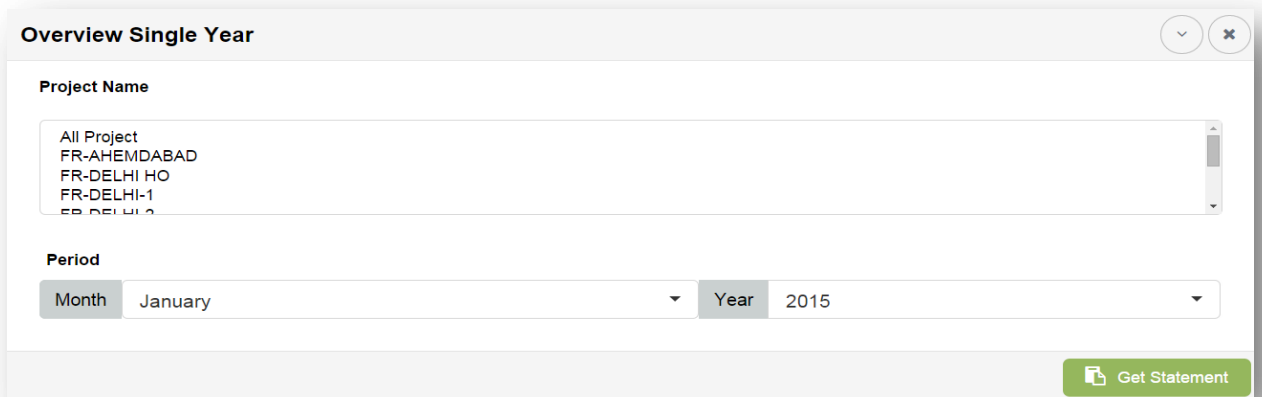
There are ten different sub-categories modules:



## Overview Single Year

Fill all the required fields in the “Overview Single Year” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to view the statement of a particular year.

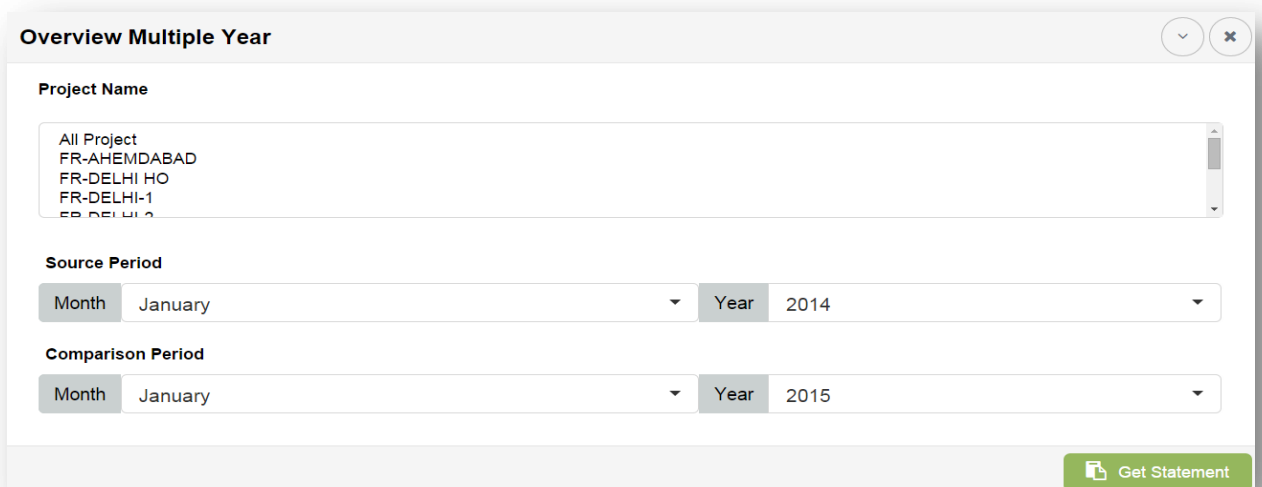


The screenshot shows a web form titled "Overview Single Year". At the top right, there are two circular icons: a downward arrow and a close 'x' symbol. Below the title, there is a section labeled "Project Name" with a dropdown menu. The menu is open, showing a list of options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this, there is a "Period" section with two dropdown menus. The first dropdown is labeled "Month" and has "January" selected. The second dropdown is labeled "Year" and has "2015" selected. At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".

## Overview Multiple Year

Fill all the required fields in the “Overview Multiple Year” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to view the statement of a multiple years.

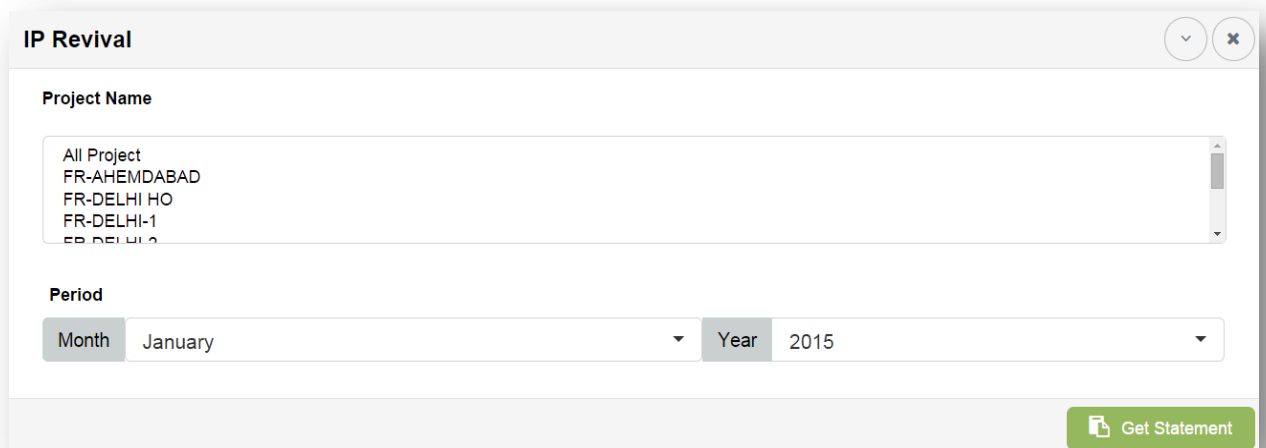


The screenshot shows a web form titled "Overview Multiple Year". At the top right, there are two circular icons: a downward arrow and a close 'x' symbol. Below the title, there is a section labeled "Project Name" with a dropdown menu. The menu is open, showing a list of options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this, there are two "Source Period" sections. The first section has a "Month" dropdown with "January" selected and a "Year" dropdown with "2014" selected. The second section has a "Month" dropdown with "January" selected and a "Year" dropdown with "2015" selected. At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".

## IP Revival

Fill all the required fields in the “IP Revival” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to view the revival statement of IP.

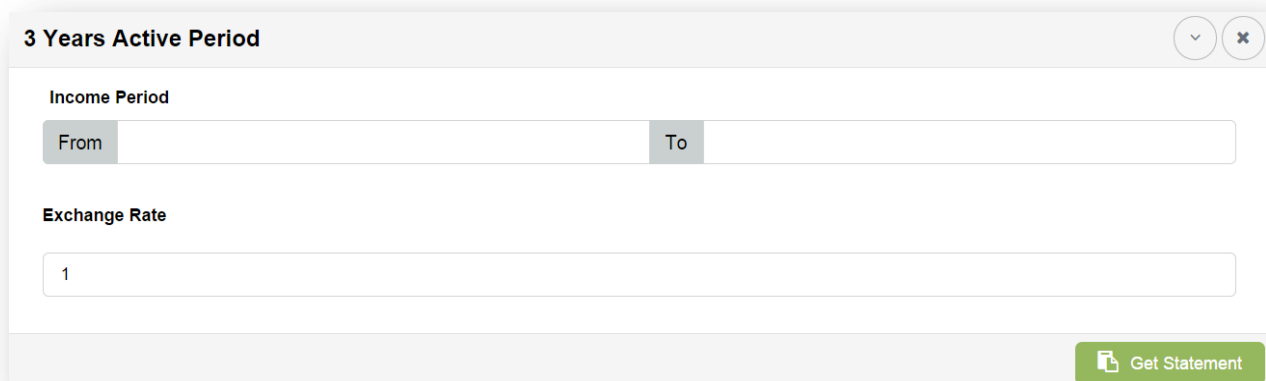


The screenshot shows a web form titled "IP Revival". It has a title bar with a dropdown arrow and a close button. The form contains two main sections: "Project Name" and "Period". The "Project Name" section has a dropdown menu with options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". The "Period" section has two dropdown menus: "Month" (set to "January") and "Year" (set to "2015"). At the bottom right, there is a green button with a document icon and the text "Get Statement".

## 3 Year Active

Fill all the required fields in the “3 Years Active Period” page and then press “**Get Statement**” button to get the specified statement.

This tab is used to view the statement of Donors which are active from 3 years.

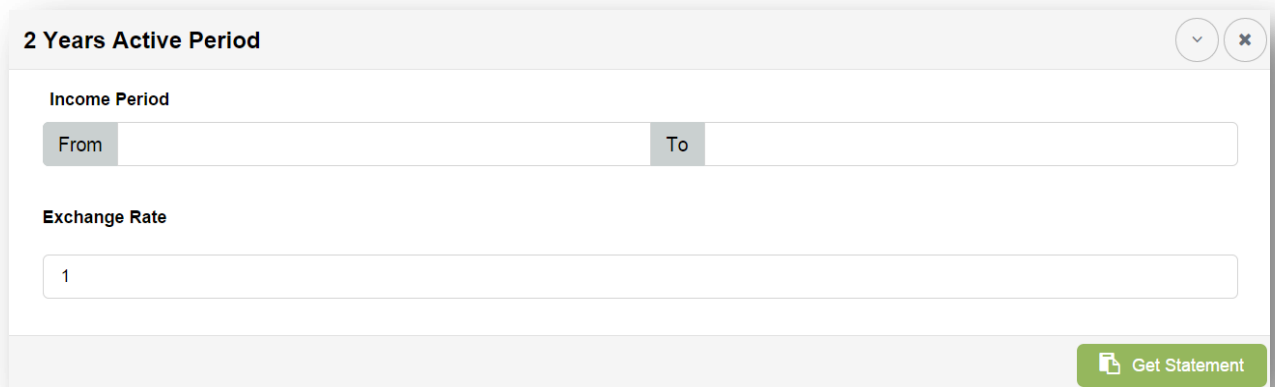


The screenshot shows a web form titled "3 Years Active Period". It has a title bar with a dropdown arrow and a close button. The form contains two main sections: "Income Period" and "Exchange Rate". The "Income Period" section has two input fields: "From" and "To". The "Exchange Rate" section has a single input field containing the value "1". At the bottom right, there is a green button with a document icon and the text "Get Statement".

## 2 Year Active

Fill all the required fields in the “2 Years Active Period” page and then press “**Get Statement**” button to get the specified statement.

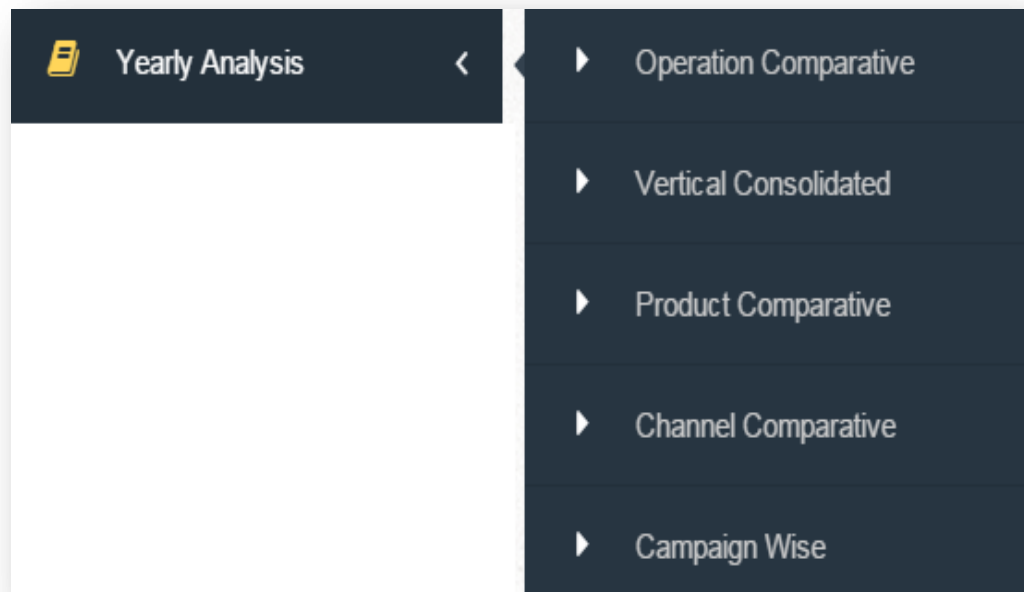
This tab is used to view the statement of Donors which are active from 2 years.



The screenshot shows a web form titled "2 Years Active Period". It has a title bar with a dropdown arrow and a close button. The form contains three input fields: "Income Period" with "From" and "To" labels, "Exchange Rate" with the value "1", and a green "Get Statement" button at the bottom right.

## Yearly Analysis

There are five different sub-categories modules in Yearly Analysis:



## Operation Comparative

Fill all the required fields in the “Operation wise Yearly Comparative” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the operation wise yearly comparative statement.

The screenshot shows a web form titled "Operation wise Yearly Comparative". It contains several input fields and dropdown menus for filtering data. The "Operation Name" dropdown is set to "All Operation". The "Source Period" and "Comparison" fields have "From" and "To" input boxes. The "Add. Criteria 1" section has "Vertical" and "Product" dropdowns, both set to "All". The "Channel" dropdown is set to "All Channel". The "With FCRA" section has radio buttons for "Yes", "No", and "All", with "Yes" selected. The "Collection:" field is empty. On the right side, the "Purpose" dropdown is set to "All Purpose", "Pay Mode" is set to "All", and the "Campaign Code" dropdown is set to "HD151130TX". A green "Get Statement" button is located at the bottom right of the form.

## Vertical Consolidated

Fill all the required fields in the “Vertical wise Yearly Comparative” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the vertical wise yearly comparative statement.

The screenshot shows a web form titled "Vertical wise Yearly Comparative". It contains several input fields and dropdown menus for filtering data. The "Operation Name" dropdown is set to "All Operation". The "Source Period" and "Comparison" fields have "From" and "To" input boxes. The "Add. Criteria 1" section has "Vertical" and "Product" dropdowns, both set to "All". The "Channel" dropdown is set to "All Channel". The "With FCRA" section has radio buttons for "Yes", "No", and "All", with "Yes" selected. The "Collection:" field is empty. On the right side, the "Purpose" dropdown is set to "All Purpose", "Pay Mode" is set to "All", and the "Campaign Code" dropdown is set to "HD151130TX". A green "Get Statement" button is located at the bottom right of the form.

## Product Comparative

Fill all the required fields in the “Productivity (acquisition product wise)” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the product wise acquisition statement.

### Productivity (acquisition product wise)

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI-1, FR-DELHI-2

Period: Month, January, Year, 2015

Vertical: All Vertical

[Get Statement](#)

## Channel Comparative

Fill all the required fields in the “Channel wise Yearly Comparative” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Channel wise yearly comparative statement.

### Channel wise Yearly Comparative

Operation Name: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI-1, FR-DELHI-2

Source Period: From, To

Comparison: From, To

Period:

Add. Criteria 1: Vertical: All, Product: All

Channel: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV

Purpose: All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND CSR

Pay Mode: All

Campaign Code: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, RD156130N1

With FCRA:  Yes  No  All

Collection:

[Get Statement](#)

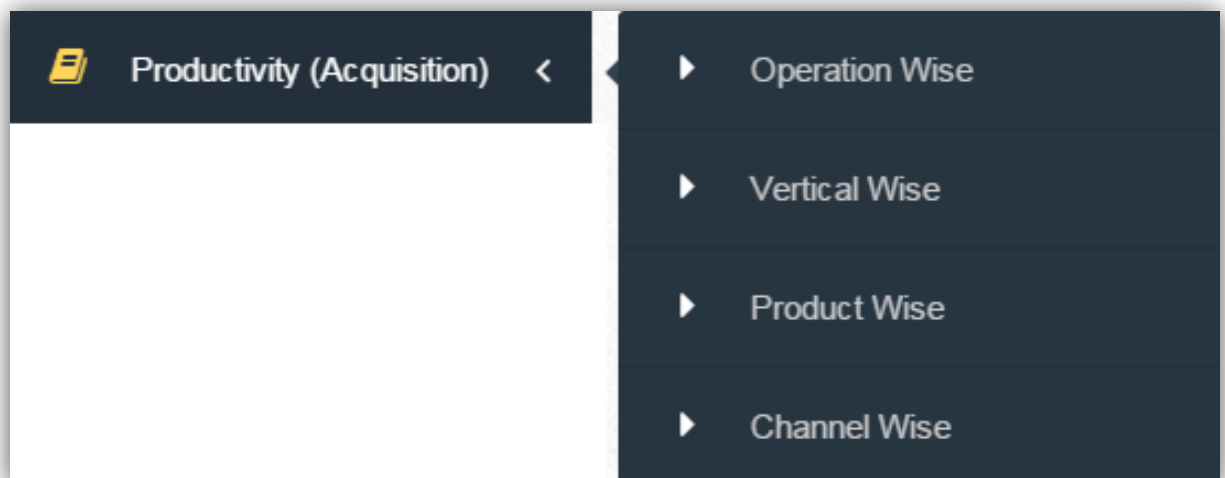
## Campaign Wise

Fill all the required fields in the “Campaign wise Yearly Comparative” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Campaign wise yearly comparative statement.

The screenshot shows a web form titled "Campaign wise Yearly Comparative". It contains several filter sections: "Operation Name" with a dropdown menu; "Source Period" and "Comparision" with "From" and "To" date pickers; "Add. Criteria 1" with "Vertical" and "Product" dropdowns; "Channel" with a dropdown menu and an orange arrow button; "Purpose" with a dropdown menu; "Pay Mode" with a dropdown menu; "Campaign Code" with a list of codes; "With FCRA" with radio buttons for "Yes", "No", and "All"; and "Collection:" with a text input field. A green "Get Statement" button is located at the bottom right.

## Productivity (Acquisition)

There are four different sub-categories modules:






## Operation Wise

Fill all the required fields in the “Productivity (acquisition project wise)” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the operation wise acquisition statement.

Productivity (acquisition project wise) ⌵ ✕

Operation Name	<input type="text" value="All Operation"/> FR-AHEMDABAD FR-DELHI HO FR-DELHI-1 FR-DELHI-2	Period	Month	January	Year	2015
		Vertical	All Vertical			


 Get Statement

## Vertical Wise

Fill all the required fields in the “Productivity (acquisition vertical wise)” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the vertical wise acquisition statement.

Productivity (acquisition vertical wise) ⌵ ✕

Operation Name	<input type="text" value="All Operation"/> FR-AHEMDABAD FR-DELHI HO FR-DELHI-1 FR-DELHI-2	Period	Month	January	Year	2015
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 Get Statement

## Product Wise

Fill all the required fields in the “Productivity (acquisition product wise)” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the product wise acquisition statement.

Productivity (acquisition product wise) ⌵ ✕

Operation Name	<input type="text" value="All Operation"/> FR-AHEMDABAD FR-DELHI HO FR-DELHI-1 FR-DELHI-2	Period	Month	January	Year	2015
		Vertical	All Vertical			




## Channel Wise

Fill all the required fields in the “Productivity (acquisition channel wise)” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Channel wise acquisition statement.

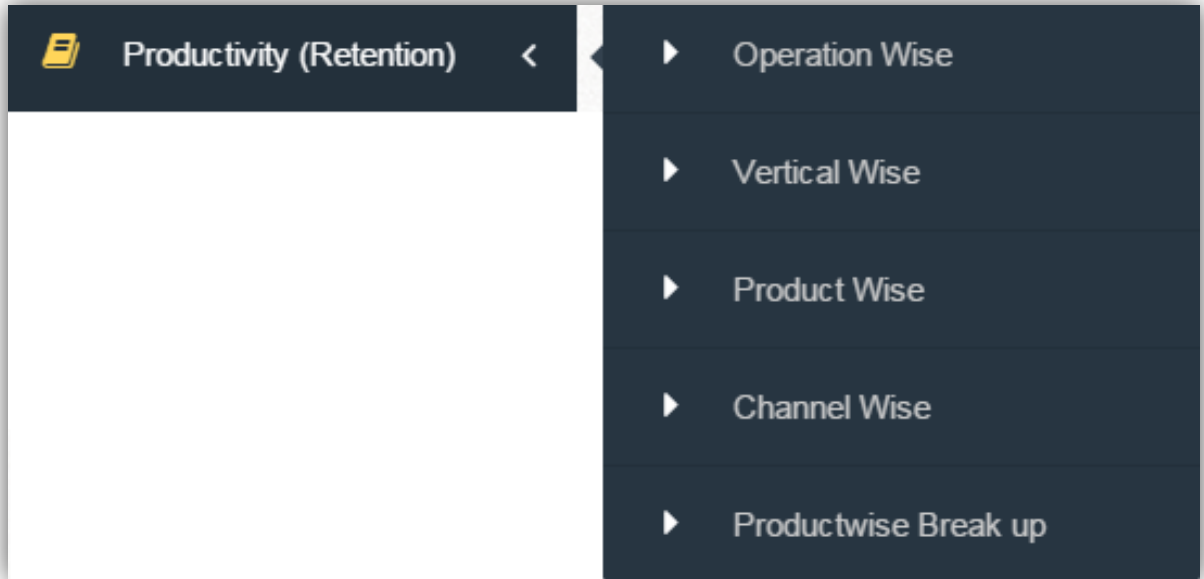
Productivity (acquisition channel wise) ⌵ ✕

Operation Name	<input type="text" value="All Operation"/> FR-AHEMDABAD FR-DELHI HO FR-DELHI-1 FR-DELHI-2	Period	Month	January	Year	2015
		Vertical	All Vertical			



# Productivity (Retention)

There are five different sub-categories modules :



## Operation Wise

Fill all the required fields in the “Operation wise Yearly Retention” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Operation wise yearly retention statement.

The screenshot shows a web form titled 'Operation wise Yearly Retention'. The form contains several input fields and a button:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO.
- Source Period:** Two input fields labeled 'From' and 'To'.
- Comparison:** Two input fields labeled 'From' and 'To'.
- Period:** A dropdown menu.
- Add. Criteria 1:** Two dropdown menus, one for 'Vertical' (with 'All' selected) and one for 'Product' (with 'All' selected).
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV.
- With FCRA:** Radio buttons for 'Yes', 'No', and 'All'.
- Collection:** A dropdown menu.
- Pay Mode:** A dropdown menu with 'All' selected.
- Campaign Code:** A dropdown menu with options: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130P1.
- Get Statement:** A green button with a document icon and the text 'Get Statement'.

## Vertical Wise

Fill all the required fields in the “Vertical wise Yearly Retention” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Vertical wise yearly retention statement.

The screenshot shows a web form titled "Vertical wise Yearly Retention". The form is divided into several sections:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO.
- Source Period:** Two input fields labeled "From" and "To".
- Comparison:** Two input fields labeled "From" and "To".
- Period:** A dropdown menu with the option "All".
- Add. Criteria 1:** Two dropdown menus, the first with "Vertical" and "All" options, and the second with "Product" and "All" options.
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV.
- With FCRA:** Radio buttons for "Yes", "No", and "All".
- Collection:** A dropdown menu.
- Pay Mode:** A dropdown menu with the option "All".
- Campaign Code:** A list of codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD155130N1.

At the bottom right of the form, there is a green button labeled "Get Statement".

## Product Wise

Fill all the required fields in the “Product wise Yearly Retention” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Product wise yearly retention statement.

The screenshot shows a web form titled "Product wise Yearly Retention". The form is divided into several sections:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI HO.
- Source Period:** Two input fields labeled "From" and "To".
- Comparison:** Two input fields labeled "From" and "To".
- Period:** A dropdown menu with the option "All".
- Add. Criteria 1:** Two dropdown menus, the first with "Vertical" and "All" options, and the second with "Product" and "All" options.
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV.
- With FCRA:** Radio buttons for "Yes", "No", and "All".
- Collection:** A dropdown menu.
- Pay Mode:** A dropdown menu with the option "All".
- Campaign Code:** A list of codes: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD155130N1.

At the bottom right of the form, there is a green button labeled "Get Statement".

## Channel Wise

Fill all the required fields in the “Channel wise Yearly Retention” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Channel wise yearly retention statement.

The screenshot shows the 'Channel wise Yearly Retention' form. It includes the following fields and options:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-BANGALORE, FR-DELHI HO, FR-DELHI-1.
- Source Period:** Two input fields labeled 'From' and 'To'.
- Comparison:** Two input fields labeled 'From' and 'To'.
- Period:** A dropdown menu.
- Add. Criteria 1:** Two dropdown menus labeled 'Vertical' (with 'All' selected) and 'Product' (with 'All' selected).
- Channel:** A dropdown menu with options: All Channel, CROWDFUNDING PORTAL, DIRECT MAIL, DONATION BOX, PPTV.
- With FCRA:** Radio buttons for 'Yes' (selected), 'No', and 'All'.
- Collection:** A dropdown menu.
- Pay Mode:** A dropdown menu with 'All' selected.
- Campaign Code:** A dropdown menu with options: HD151130TX, MD152130N1, TD153120TY, RD153131RM, RC154130S1, MD155130N2, DD156130N1.
- Get Statement:** A green button at the bottom right.

## Product Wise Break up

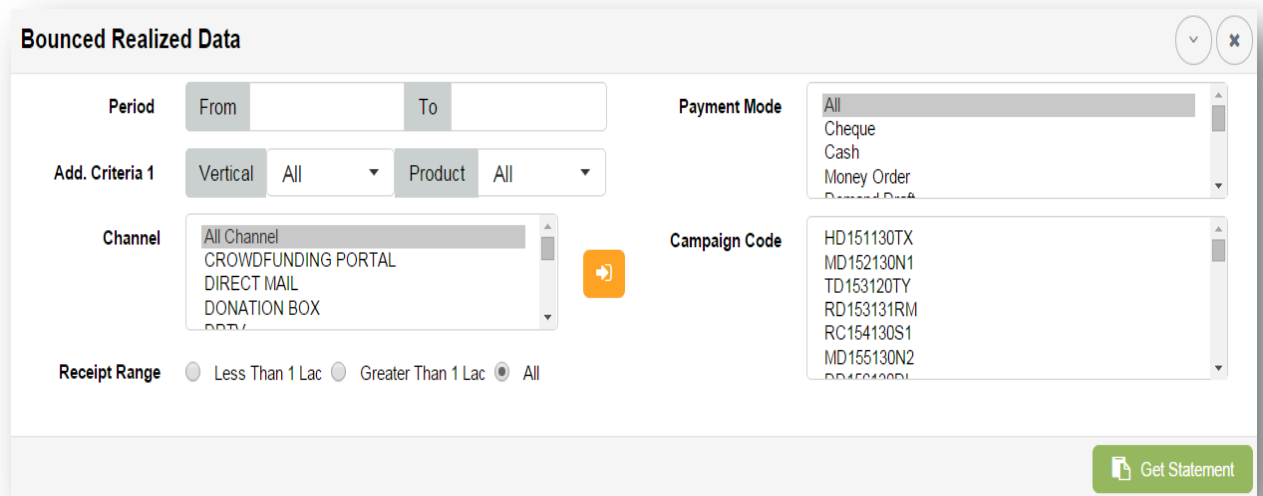
Fill all the required fields in the “Product Wise Breakup” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the product wise breakup statement.

The screenshot shows the 'Product Wise Breakup' form. It includes the following fields and options:

- Operation Name:** A dropdown menu with options: All Operation, FR-AHEMDABAD, FR-DELHI HO, FR-DELHI-1, FR-DELHI-2.
- Period:** Two dropdown menus: 'Month' (with 'January' selected) and 'Year' (with '2015' selected).
- Vertical:** A dropdown menu with 'All Vertical' selected.
- Get Statement:** A green button at the bottom right.

## Bounced/ Realized Data

Fill all the required fields in the “Bounced Realized Data” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Bounced Realized Data statement.

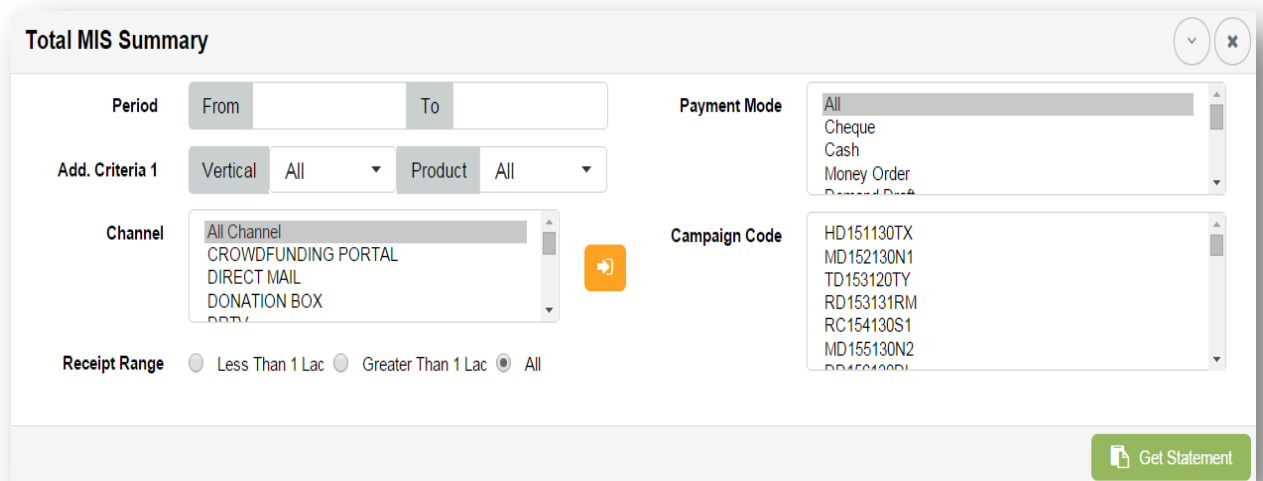


The screenshot shows the "Bounced Realized Data" form. It includes the following fields and options:

- Period:** From and To date pickers.
- Add. Criteria 1:** Vertical (All) and Product (All) dropdowns.
- Channel:** A list box containing "All Channel", "CROWDFUNDING PORTAL", "DIRECT MAIL", "DONATION BOX", and "PDP".
- Receipt Range:** Radio buttons for "Less Than 1 Lac", "Greater Than 1 Lac", and "All".
- Payment Mode:** A list box containing "All", "Cheque", "Cash", and "Money Order".
- Campaign Code:** A list box containing "HD151130TX", "MD152130N1", "TD153120TY", "RD153131RM", "RC154130S1", and "MD155130N2".
- Buttons:** An orange arrow button next to the Channel list box and a green "Get Statement" button at the bottom right.

## Daily MIS Summary

Fill all the required fields in the “Daily MIS Summary” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Total MIS Summary statement.



The screenshot shows the "Total MIS Summary" form, which is identical in layout and content to the "Bounced Realized Data" form. It includes the following fields and options:

- Period:** From and To date pickers.
- Add. Criteria 1:** Vertical (All) and Product (All) dropdowns.
- Channel:** A list box containing "All Channel", "CROWDFUNDING PORTAL", "DIRECT MAIL", "DONATION BOX", and "PDP".
- Receipt Range:** Radio buttons for "Less Than 1 Lac", "Greater Than 1 Lac", and "All".
- Payment Mode:** A list box containing "All", "Cheque", "Cash", and "Money Order".
- Campaign Code:** A list box containing "HD151130TX", "MD152130N1", "TD153120TY", "RD153131RM", "RC154130S1", and "MD155130N2".
- Buttons:** An orange arrow button next to the Channel list box and a green "Get Statement" button at the bottom right.

# Individual Partner



## Collection Status

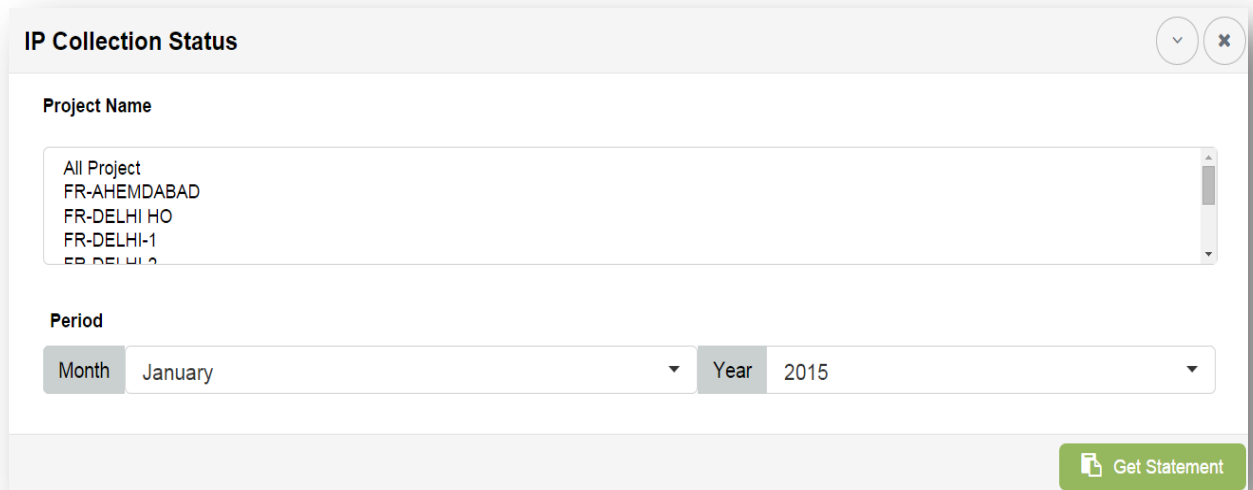
The Collection Status showcases the Individual Partner yearly collection as FDC & Non-FDC's.

There are two different sub-categories modules:



## Single Year (FDC & Non-FDC)

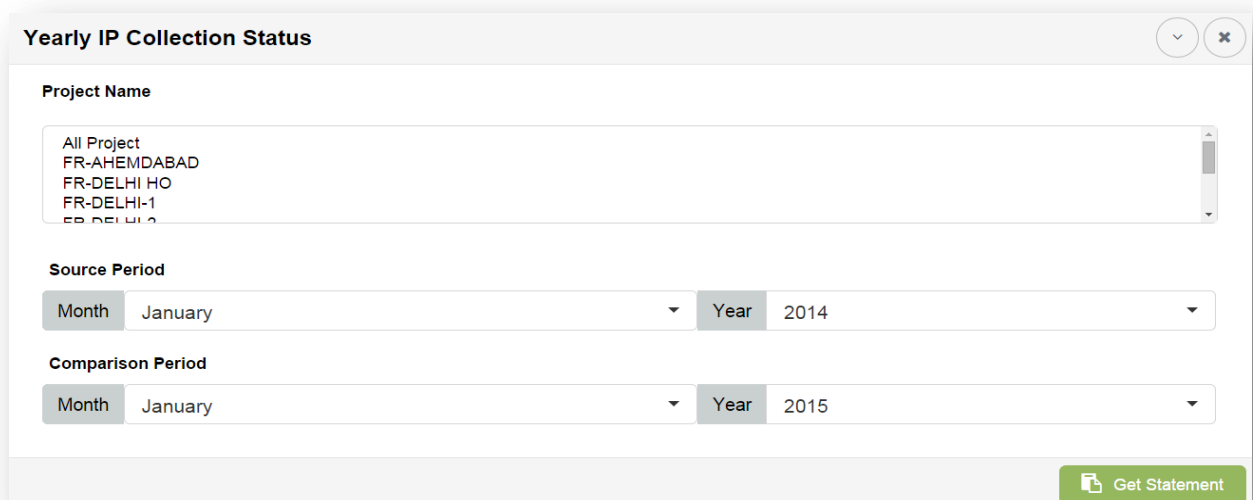
Fill all the required fields in the “IP Collection Status” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Single year IP collection statement.



The screenshot shows a web form titled "IP Collection Status". At the top right, there are two small circular icons: a downward arrow and a close 'x' symbol. Below the title, there is a section labeled "Project Name" with a dropdown menu. The menu is open, showing a list of options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this, there is a "Period" section with two dropdown menus. The first dropdown is labeled "Month" and has "January" selected. The second dropdown is labeled "Year" and has "2015" selected. At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".

## Multiple Year (FDC & Non-FDC)

Fill all the required fields in the “Yearly IP Collection Status” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Multiple year IP collection statement.



The screenshot shows a web form titled "Yearly IP Collection Status". At the top right, there are two small circular icons: a downward arrow and a close 'x' symbol. Below the title, there is a section labeled "Project Name" with a dropdown menu. The menu is open, showing a list of options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this, there are two "Source Period" sections. The first "Source Period" section has a "Month" dropdown with "January" selected and a "Year" dropdown with "2014" selected. The second "Source Period" section has a "Month" dropdown with "January" selected and a "Year" dropdown with "2015" selected. At the bottom right of the form, there is a green button with a document icon and the text "Get Statement".



# Corporate Partner



## Collection Status

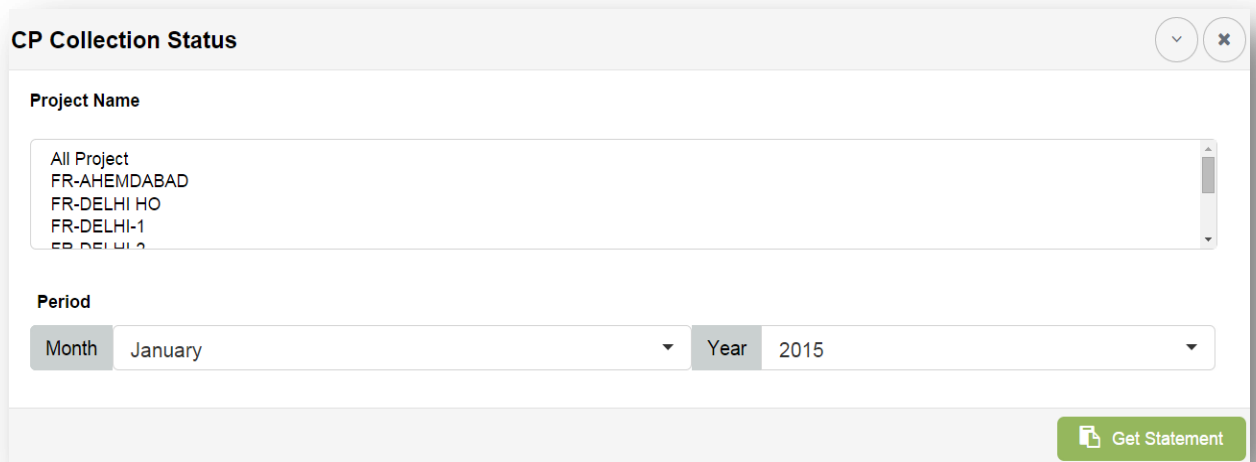
The Collection Status showcases the Corporate Partner yearly collection as FDC & Non-FDC's.

There are two different sub-categories modules:



## Single Year (FDC & Non-FDC)

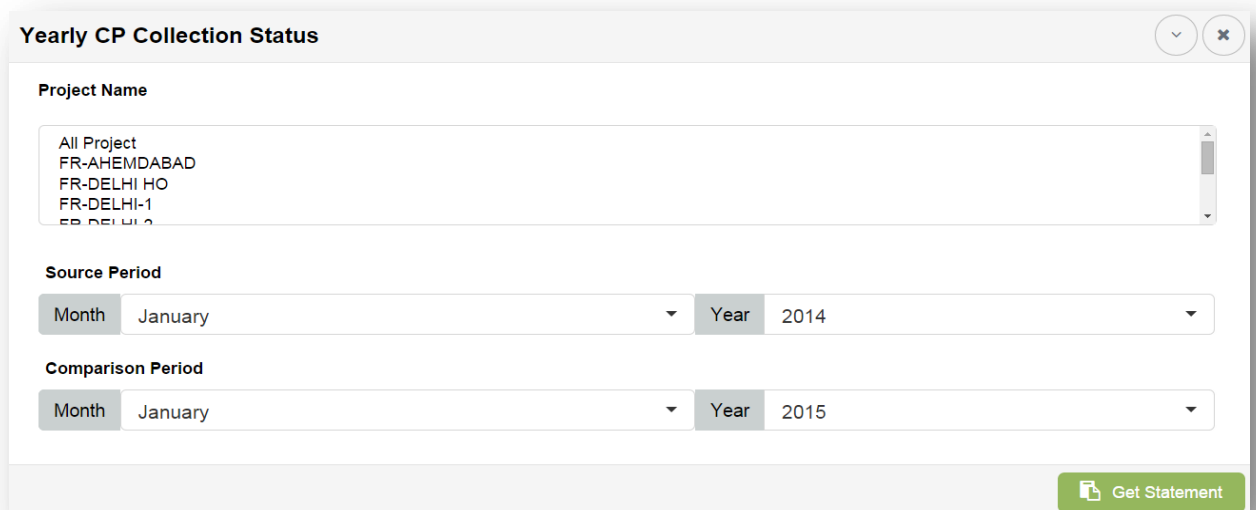
Fill all the required fields in the “CP Collection Status” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Single year CP collection statement.



The screenshot shows a web form titled "CP Collection Status". It features a "Project Name" dropdown menu with options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this is a "Period" section with two dropdown menus: "Month" (set to "January") and "Year" (set to "2015"). A green "Get Statement" button is located at the bottom right of the form.

## Multiple Year (FDC & Non-FDC)

Fill all the required fields in the “Yearly CP Collection Status” page and then press “**Get Statement**” button to get the specified statement. This tab is used to view the Multiple year CP collection statement.



The screenshot shows a web form titled "Yearly CP Collection Status". It features a "Project Name" dropdown menu with options: "All Project", "FR-AHEMDABAD", "FR-DELHI HO", "FR-DELHI-1", and "FR-DELHI-2". Below this are two "Source Period" sections. The first "Source Period" has "Month" set to "January" and "Year" set to "2014". The second "Source Period" has "Month" set to "January" and "Year" set to "2015". A green "Get Statement" button is located at the bottom right of the form.

## **PRINTING/DISPATCH**

This option is used for printing and dispatch of receipts, letters, and labels.

Different modules of Printing and Dispatch are displayed in this **“Printing/Dispatch”** option.



There are three different sub-categories modules:

- Receipts
- Letters
- Labels

# Receipts

Fill all the required fields in the “Print Receipts” page and then press “**Search**” button to find the specified donation receipt.

The screenshot shows the 'Print Receipts' interface with the following fields and options:

- Year ID:** All Year
- Project:** All Project
- Receipt Period:** From [ ] To [ ]
- Vertical:** All Vertical
- Product:** All product
- Purpose:** All Purpose, EDUCATION, GENERAL DONATION, HEALTH, HUMANITARIAN AND DD
- Account No.:** [ ]
- Name:** [ ]
- Email ID:** [ ]
- Group Name:** All Group, ADOR WELDING, AMICORP, APPLIED MATERIALS, ADVANTO
- Channel:** All Channel
- Campaign:** All Campaign, AM15AHNNAQ, DB15AIDSAQ, DD156130DL, E154130DT
- Pay Mode:** All
- Donor ID:** [ ]
- Ref No.:** Receipt No. [ ], Transaction ID [ ]
- ECS Ref. No.:** [ ]
- Report Format:** Generate As [ ], All [ ], Export To [ ], View [ ]
- Show only NON:**
- ECS Receipts:** [ ]

Buttons: Search, Export Data

Then a new window will pop-up that displays the required donation receipt that needs to be printed.

# Letters

There are three different sub-categories modules:

- Welcome
- Thank You
- Reminder



## Welcome

This will showcase the Welcome letter for donor.

## Thank You

This will showcase the Thank You letter for donor.

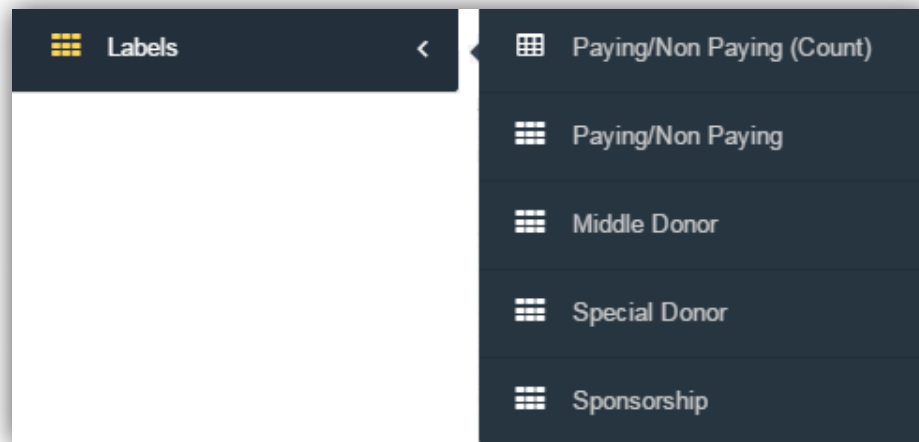
## Reminder

This will showcase the Reminder letter for donor.

# Labels

There are five different sub-categories modules:

- Paying/Non Paying (Count)
- Paying/Non Paying
- Middle Donor
- Special Donor
- Sponsorship



## Paying/Non Paying (Count)

Print the counted the paying and non paying amount.

## Paying/Non Paying

Print the paying and non paying amount.

## Middle Donor

Print the list of Middle Donor.

## Special Donor

Print the list of Special Donor.

## Sponsorship

Print the list of Sponsorship that sponsor give away to the beneficiary child.

# REMINDERS

To give a reminder to the responsive donor about their contribution as a donation to the organization.



- **General Donor**  
Search the respective donor that needs to be reminded about their contribution.  
Then a letter can be printed by pressing **“Print Letter”** button or the reminder can reset for the next 90 days by pressing **“Reset Reminder Next 90 days”**.

**General Reminder List** Export Data

Show  entries Search:

Sl No.	Donor ID	Name	Operation ID	Product Type	Address	Location	Last Cont. Details	Camp. Code	Reminder Date	Contributions / Sponsorship	Print
1.	NCO/51	MR. ARVIND RANJAN Contact No. :9711090175,	NCO/1	COMMITTED DONORS	C-1/81, MOTI BAGH NORTH, SHANTI PATH NEW DELHI, DELHI INDIA	National	0.00 Issue By:		NON-PAYING <a href="#">Click for reasons</a> 18-May-2015		<input type="checkbox"/>

Showing 1 to 1 of 1 entries Previous **1** Next

Print Letter Reset Reminder Next 90 Days

## **For Further Help**

Please Contact:

VS Design Worx Pvt. Ltd.

B-155, IIIrd Floor, DDA Sheds, Okhla Industrial Area Phase`-1, New Delhi-110020, India.

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[support@vallesoft.com](mailto:support@vallesoft.com)

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