Orphan & Sponsor Management System

User Guide

Version 1.8 · April 2026 · For Admin & Staff Users

Updated: Gift Aid Integration (UK)

Admin	Staff

1. Introduction

This guide explains how to use the Orphan & Sponsor Management System.

1.1 Who Should Read This Guide

Role	Access Level	Can Do
Admin	Full Access	Everything — manage users, settings, backup, all CRUD + import
Staff	Standard Access	View and edit orphans/sponsors/alerts/reports
Viewer	Read-Only	View data and reports only

1.2 How to Access the System

1. Open your web browser (Chrome, Firefox, or Edge recommended)
2. Navigate to the system URL provided by your administrator
3. Enter your username and password — username is case-sensitive (use lowercase: admin)
4. Click Sign In to access the dashboard

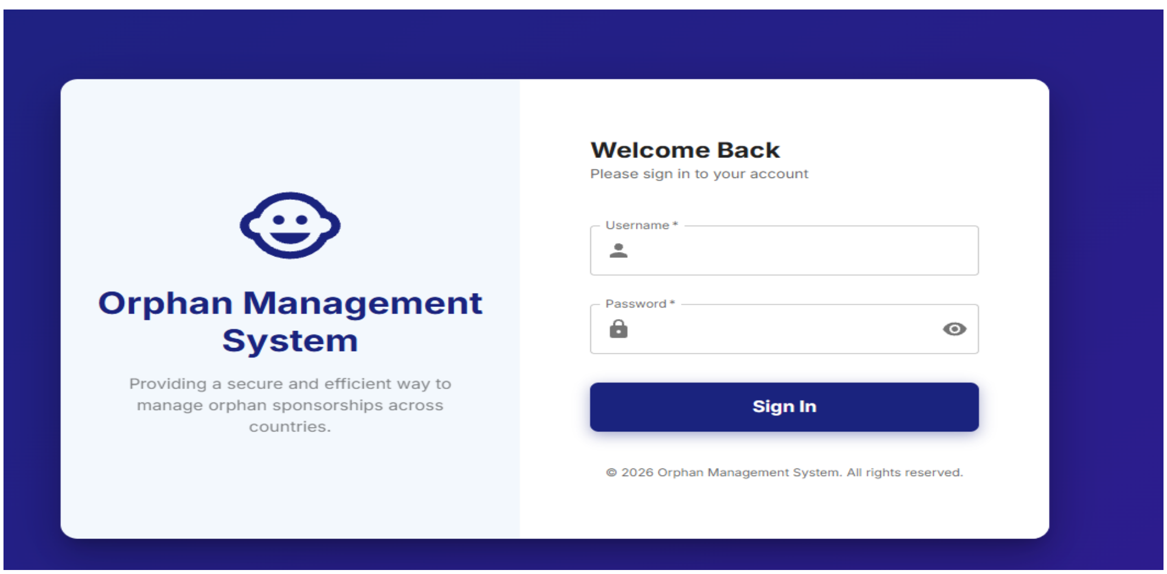


Figure 1 — Login Page

ⓘ Your username and password are set by the System Administrator.

⚠ Do not share your credentials. Log out when you finish your session.

1.3 Navigation Overview

- Top Bar — Logo, global search, settings icon, your name & role badge, logout button

- Left Sidebar — Main navigation — Dashboard, Orphans, Sponsors, Reassignment, Countries, Alerts, Reports, Emails, Files, Activity Logs, Users, Settings

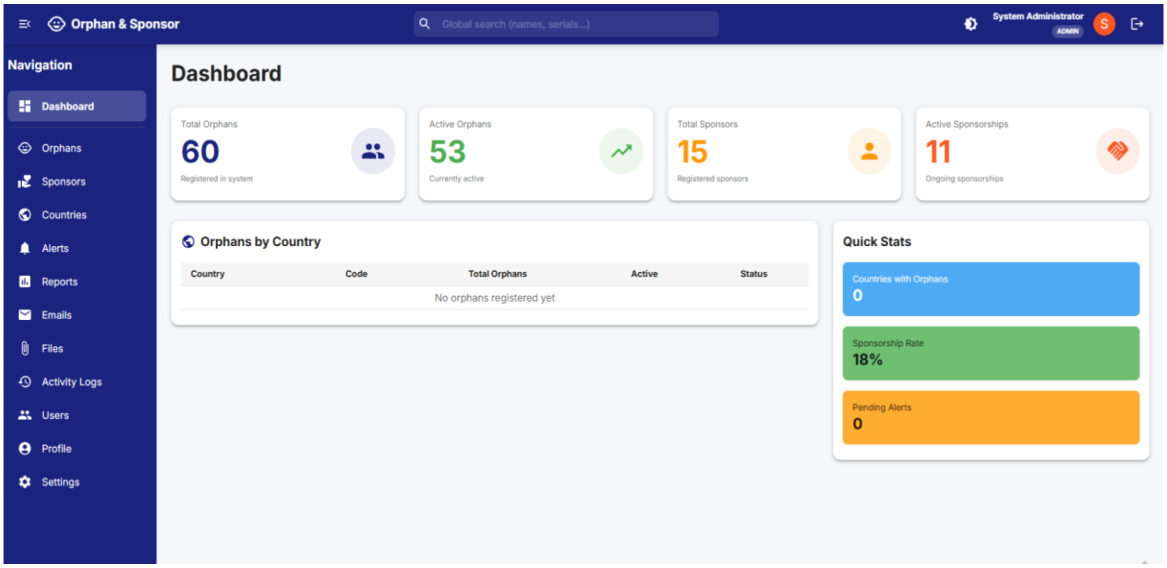


Figure 2 — Dashboard (main screen after login)

Section 2 — Dashboard

Your system at a glance

2.1 Key Metrics (Top Cards)

Card	What it Shows
Total Orphans	Total registered orphans (all statuses)
Active Orphans	Orphans with status = Active
Total Sponsors	Total registered sponsors
Active Sponsorships	Orphans currently linked to a sponsor

Section 3 — Orphan Management

Add, edit, search, import, and manage orphan records

3.1 Viewing & Searching Orphans

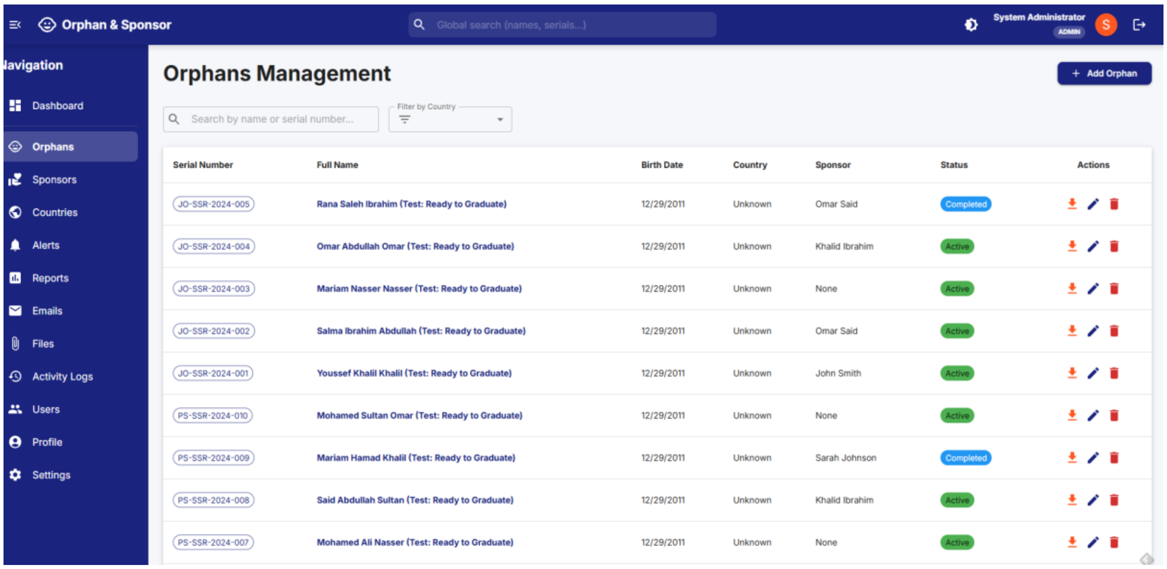


Figure 3 — Orphans Management page

- Serial Number — Auto-generated: Prefix-Year-Number (e.g. BA-2022-001)
- Filters — Country, Gender, Sponsorship status, Age Group
- Actions — Download PDF (↓), Edit (✏️), Delete (🗑️)

3.2 Orphan Quick View

Click on any orphan name to open the Quick View dialog. It contains 3 tabs:

- Profile Info — Personal details, education, and current sponsor
- Sponsorship History — Full history of all past and current sponsors for this orphan
- Documents — Files attached to this orphan

ℹ️ Click View Full Report to generate a PDF profile for this orphan.

3.3 Orphan Sponsorship History

Every time an orphan is assigned, transferred, or updated to a new sponsor, the system automatically records the change. You can view the full history in the Quick View → Sponsorship History tab.

#	Sponsor	Code	From	To / Status
1	John Smith	SPO-003	2024-01-01	Current
2	Ali Hassan	SPO-001	2023-01-01	2023-12-31

ⓘ The history is recorded automatically — no manual entry needed.

3.4 Adding a New Orphan 🔑 Admin

5. Click + Add Orphan (top-right)
6. Fill required fields: Full Name, Birth Date, Country
7. Fill optional tabs: Location & Personal, Family, Education & Interests, Photos, Documents
8. Click Save — serial number auto-generated

ⓘ Serial numbers are generated automatically. You cannot set them manually.

3.5 Orphan Status Values

Status	Meaning
Active	Currently registered and eligible for sponsorship
Completed	Reached age 14 — sponsorship cycle ended
Transferred	Transferred to another organization
Deleted	Marked for deletion — hidden from main views

3.6 Importing Orphans from Excel 🔑 Admin

9. Orphans page → click Import
10. Click Download Template to get the official 16-column file
11. Fill in data and upload

ⓘ Gender accepts M, F, male, female (any case). Country Code must be active (e.g. BD not BA).

3.7 Bulk Delete Orphans 🔑 Admin

12. Go to Orphans page
13. Check the checkbox on the left of each orphan you want to delete
14. Or check the top checkbox in the header to Select All visible orphans
15. A red Delete Selected (N) button appears above the table
16. Click it → a confirmation dialog appears showing how many orphans will be deleted
17. Click Confirm Delete to proceed

ⓘ Deleted orphans are hidden from all views. Their serial numbers are permanently reserved and will not be reused.

⚠ *This action cannot be undone. If you accidentally delete orphans, contact your system administrator to restore from backup.*

🤝 Section 4 — Sponsor Management

Manage sponsors, commitments, donations, and communications

4.1 Viewing Sponsors

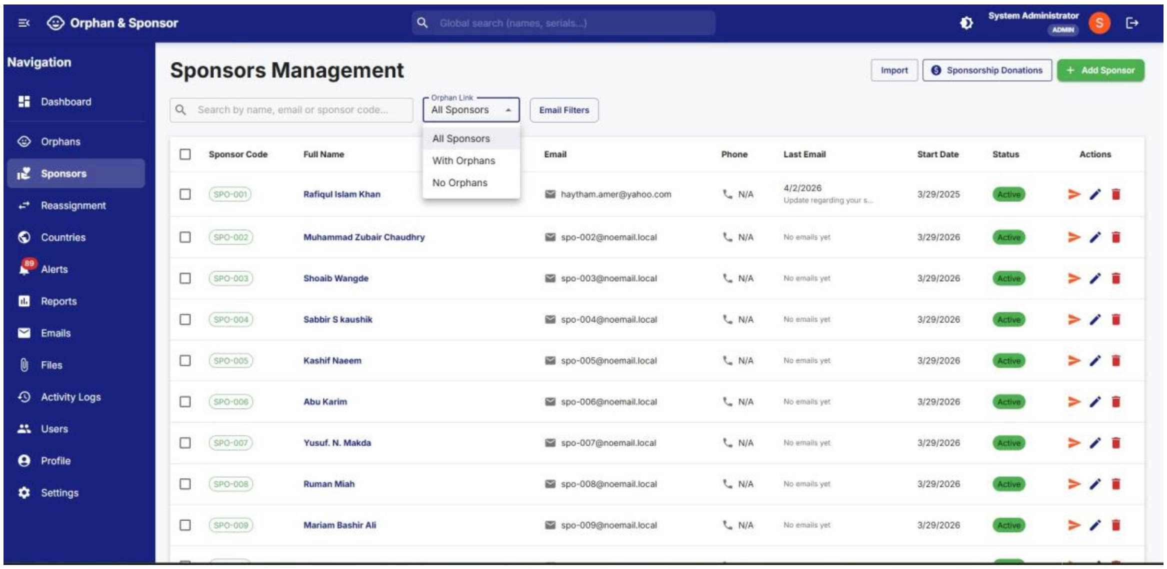


Figure 4 — Sponsors Management page with Orphan Link filter

- Sponsor Code — Auto-generated (e.g. SPO-001)
- Orphan Link Filter — Filter by: All Sponsors / With Orphans / No Orphans
- Actions — Sponsorship Donations (💲), Send Email (▶), Edit (✏️), Delete (🗑️)

4.2 Bulk Delete Sponsors 🔑 Admin

18. Check the checkbox next to each sponsor you want to delete
19. A red Delete Selected (N) button appears
20. Click it → confirm the deletion

⚠️ *Cannot delete sponsors who have active orphans linked. Unlink orphans first.*

4.3 Sponsor Quick View

Click any sponsor name to open the Quick View. It has 3 tabs:

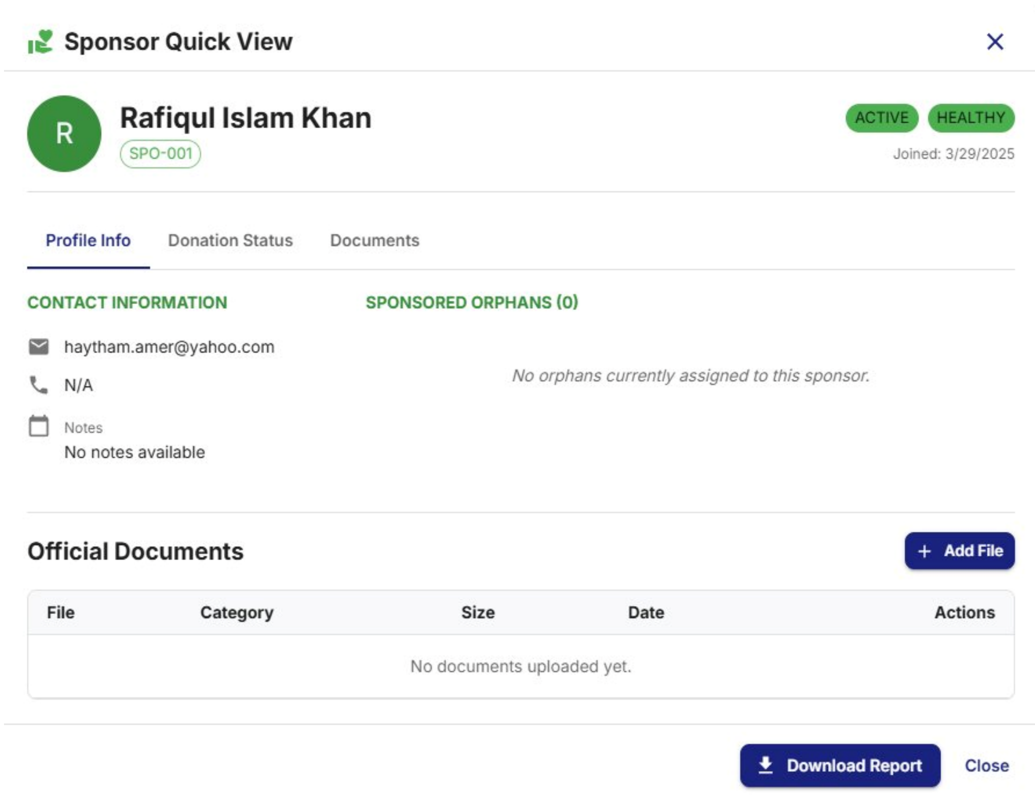


Figure 5 — Sponsor Quick View: Profile Info tab

- Profile Info — Contact details, preferred payment method, and linked orphans
- Donation Status — Sponsorship commitment, payment progress, and recent payments with receipt download
- Documents — Files attached to this sponsor

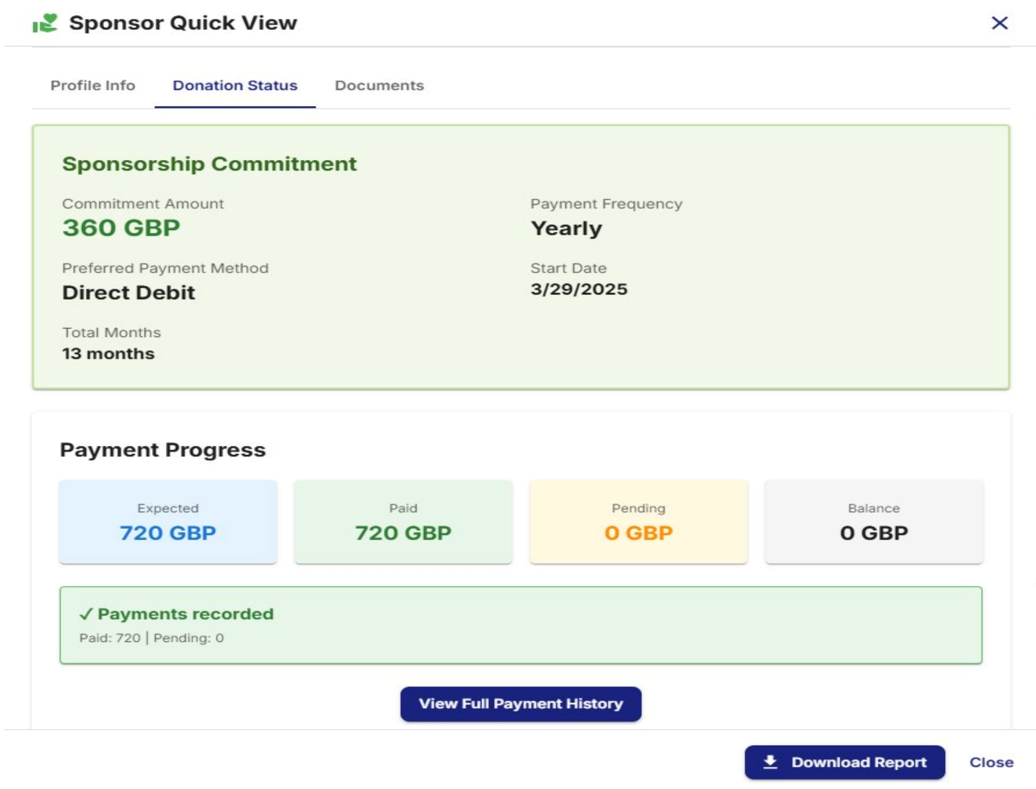


Figure 6 — Sponsor Quick View: Donation Status tab

From the Donation Status tab, you can:

- View payment progress (Expected vs Paid vs Pending vs Balance)
- Download individual payment receipts by clicking the receipt icon 🧾 next to each payment
- Click View Full Payment History to see all payments

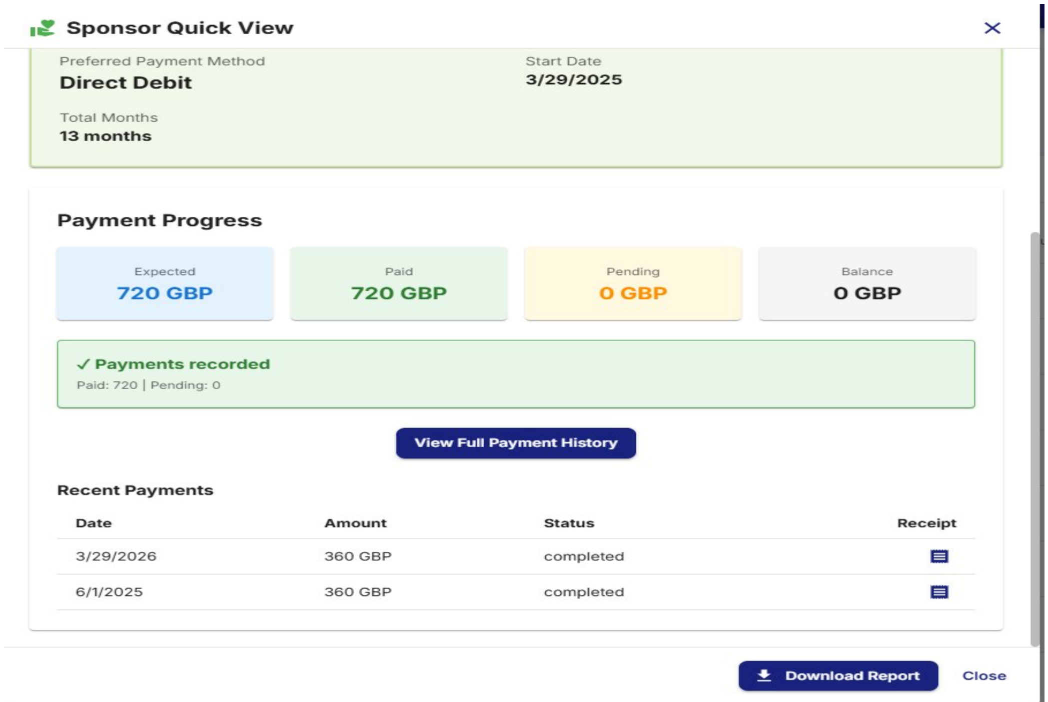


Figure 7 — Recent Payments with Receipt download button

Download Sponsor Report:

Click the Download Report button at the bottom of the Quick View to generate a full PDF report for this sponsor. The report includes:

- Sponsor information and commitment details
- List of linked orphans
- Full payment history
- Sponsorship history

ⓘ Report filename format: sponsor-details-{SponsorName}-{Date}.pdf

4.4 Adding a New Sponsor 🔑 Admin

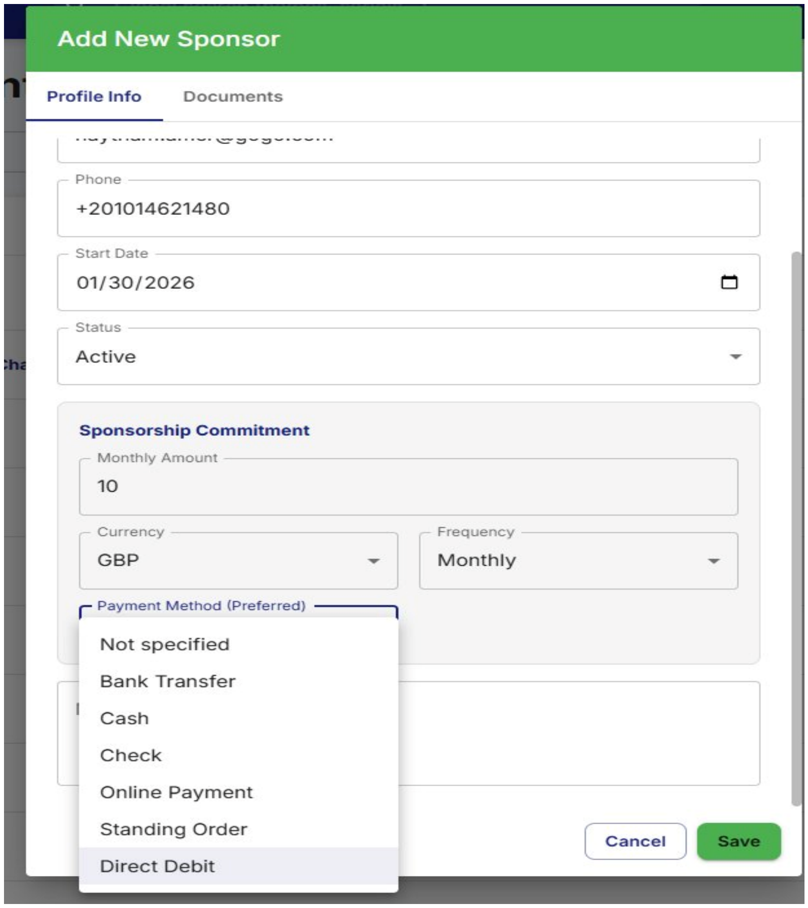


Figure 8 — Add New Sponsor form showing Preferred Payment Method

21. Click + Add Sponsor (top-right)
22. Fill in: Full Name (required), Email (optional), Phone, Start Date
23. Set payment commitment: Commitment Amount, Currency (default GBP), Payment Frequency (Monthly / Yearly)
24. Set Preferred Payment Method — select how this sponsor typically pays (Bank Transfer, Cash, Check, Online Payment, Standing Order, or Direct Debit)
25. Add notes — recommended: include organization reference ID (e.g. SP-22-050)
26. Click Save

ⓘ Email is optional. If blank, the system auto-generates a placeholder (spo-001@noemail.local).

ⓘ Default currency is GBP. Change only if the sponsor pays in a different currency.

ⓘ Setting Commitment Amount and Frequency is important — the system uses these to monitor payment health automatically.

4.5 Sending an Email to a Sponsor

27. Find the sponsor → click orange arrow (▶) → compose and send

⚠ *Sponsors with auto-generated emails (@noemail.local) cannot receive emails. Update their email first.*

4.6 Importing Sponsors from Excel 🔑 Admin

28. Download Sponsor Template (13 columns)
29. Fill in data — include Orphan Serial column to link sponsor to orphan in one step
30. Column 9: Preferred Payment Method (e.g. Standing Order, Direct Debit)
31. Column 10: Address (for Gift Aid)
32. Column 11: Post Code (for Gift Aid)
33. Column 12: Gift Aid Eligible (yes/no)
34. Column 13: Gift Aid Declaration Date (YYYY-MM-DD)
35. Upload and review results

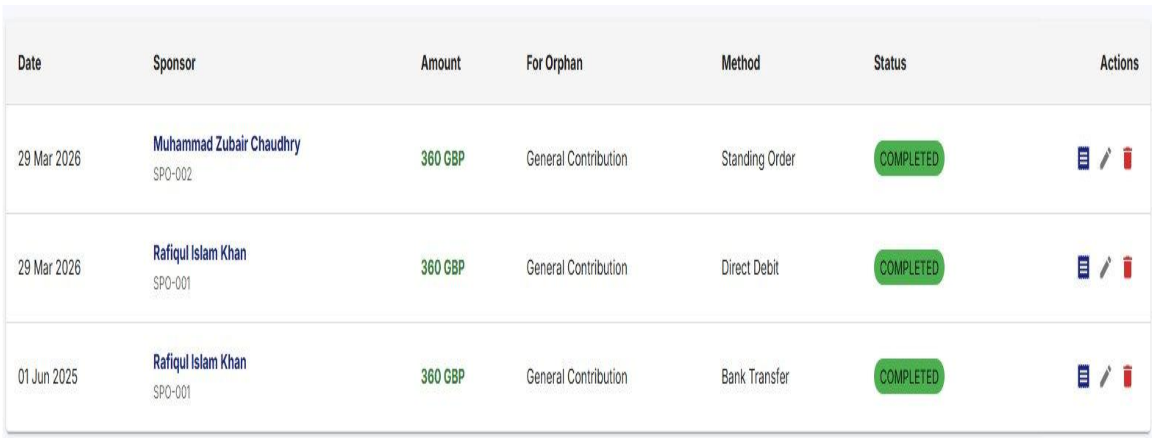
ⓘ *Recommended: import orphans first, then sponsors with the Orphan Serial column filled in.*

Section 5 — Sponsorship Donations

Record and monitor sponsor payments

The Sponsorship Donations module is where you record actual payments received from sponsors and monitor whether each sponsor is meeting their financial commitment.

Access it from: Sponsors page → click the $ Sponsorship Donations button (top-right)



Date	Sponsor	Amount	For Orphan	Method	Status	Actions
29 Mar 2026	Muhammad Zubair Chaudhry SPO-002	360 GBP	General Contribution	Standing Order	COMPLETED	
29 Mar 2026	Rafiqul Islam Khan SPO-001	360 GBP	General Contribution	Direct Debit	COMPLETED	
01 Jun 2025	Rafiqul Islam Khan SPO-001	360 GBP	General Contribution	Bank Transfer	COMPLETED	

Figure 9 — Payments table with Receipt download icon

5.1 How the System Monitors Payments

When you add a sponsor, you set three key values:

- Commitment Amount — The base amount the sponsor committed to pay per period (e.g. £360)
- Payment Frequency — How often they pay: Monthly or Yearly
- Start Date — The date the sponsorship began

Every day at 9:00 AM, the system automatically calculates for each sponsor:

What the System Checks	How it Calculates
Expected Total	Number of periods since start date × committed amount
Actual Total Paid	Sum of all Completed payments recorded
Gap	Expected Total minus Actual Total Paid
Health Status	Based on the gap — see table below

5.2 Payment Health Status

Status	What it Means	When it Triggers
✅ Healthy	On track — no issues	Actual paid >= Expected total
⚠️ Warning	Slightly behind	Behind by exactly one period
🔴 Critical	Significantly behind	Behind by more than one period
⚪ Neutral	No commitment set	Sponsor has no amount configured

📝 **Example — Monthly Sponsor**

Sponsor started: January 2024 | Monthly amount: £30 | Today: April 2026

Expected total: 27 months × £30 = £810

Paid so far: £780 → Gap = £30 → Status: ⚠️ Warning (behind by 1 month)

Paid so far: £720 → Gap = £90 → Status: 🔴 Critical (behind by 3 months)

📝 **Example — Yearly Sponsor**

Sponsor started: January 2024 | Yearly amount: £360 | Today: April 2026

Expected: 2 yearly payments = £720

If not paid by February 2026 (1 month after Jan 2026 anniversary) → Status: 🔴 Critical

5.3 Payment Status: Completed vs Pending

Status	When to Use
Completed ✅	Payment has been received and confirmed. This is counted in the health calculation.
Pending ⏳	Payment scheduled, cheque awaiting clearance, or future date. NOT counted in health.
Failed ❌	Payment attempt failed or was rejected.
Refunded 🔄	Payment was returned to the sponsor.

⚠️ *Only Completed payments are counted in the health analysis. A Pending payment does not stop the system from generating a Warning or Critical alert.*

5.4 Logging a Donation 🔑 Admin

36. Go to Sponsors page → click 💲 Sponsorship Donations button
37. Click + Log Donation (top-right of the page)
38. Select the Sponsor
39. Optionally link to a specific Orphan
40. Enter the Amount and Currency (default GBP)
41. Set the Payment Date — use today's date if payment was received today
42. Select Payment Method: Bank Transfer, Cash, Check, Online Payment, Standing Order, or Direct Debit
43. Set the Status: Completed if money received, Pending if not yet received
44. Click Save

ℹ️ If you select a future payment date, the system automatically sets the Status to Pending. Change it to Completed when the money is actually received.

5.5 Downloading a Payment Receipt

For each recorded payment, you can download an official PDF receipt:

- From Payments page — click the receipt icon 🧾 in the Actions column next to any payment
- From Sponsor Quick View → Donation Status tab → Recent Payments → click receipt icon 🧾

The receipt includes: Receipt number (SSR-YEAR-PMTxxxx), Sponsor details, Orphan details (if linked), Amount, Payment method, Date, and Status.

ℹ️ Receipt filename format: receipt-{SponsorName}-{PaymentDate}.pdf

5.6 What Happens When a Sponsor Reaches Critical Status

When the daily check detects a Critical sponsor, the system automatically:

- Creates a Critical alert visible on the Alerts page
- If the sponsor has an orphan assigned — creates a Reassignment Case for admin review (see Section 6)
- Sends an email notification to the admin

ℹ️ To clear a Critical status: log the missing payments as Completed in the Sponsorship Donations page.

5.7 Gift Aid Report GB (UK Only)

The Gift Aid tab in the Sponsorship Donations page lets you generate a report of all completed donations from Gift Aid eligible sponsors, ready for HMRC submission.

45. Go to Sponsorship Donations → click the GB Gift Aid tab
46. Select a From Date and To Date (e.g. the tax year: 6 April to 5 April)
47. Click Preview to review the donations before exporting
48. Click Export Excel to download the report for HMRC submission

ℹ️ The report includes: Sponsor Name, Sponsor Code, Address, Post Code, Declaration Date, Donation Date, Amount (£), and Gift Aid Value (25%). Only completed donations from Gift Aid eligible sponsors are included.

⚠ A sponsor must have Gift Aid Eligible enabled in their profile before their donations appear in this report. See Section 4.4.

Section 6 — Reassignment Cases

Review and action orphan reassignment requests

When a sponsor reaches Critical payment status and has an orphan assigned, the system automatically creates a Reassignment Case. This is a formal request for an admin to review and decide whether to move the orphan to a different sponsor.

> *No reassignment happens automatically — a human admin must approve every case.*

6.1 Reviewing Cases

49. Go to Reassignment from the left sidebar
50. Use the filter tabs: All | Pending | Approved | Rejected
51. Review each case — it shows the orphan, current sponsor, payment gap, and reason

6.2 Approving a Reassignment

52. Find the Pending case → click Approve
53. Select the new sponsor from the dropdown (if not already suggested)
54. Add review notes explaining the decision
55. Click Confirm Approve

The orphan is immediately unlinked from the current sponsor and linked to the new sponsor. The change is automatically recorded in the Orphan's Sponsorship History. The action is also recorded in the Activity Log.

> ⚠ *This action cannot be undone automatically. If a mistake is made, go to the orphan record and manually update the sponsor.*

6.3 Rejecting a Reassignment

56. Find the Pending case → click Reject
57. Enter the reason for rejection (required)
58. Click Confirm Reject

The orphan remains with the current sponsor. Consider contacting the sponsor to resolve the payment issue.

🔔 Section 7 — Alerts

Monitor and respond to system alerts

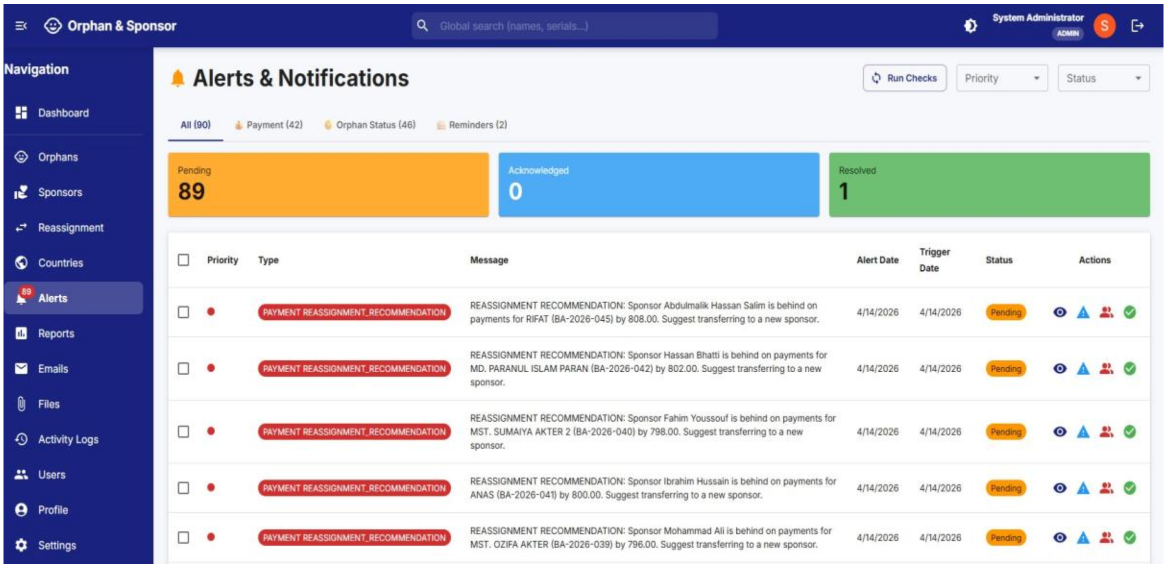


Figure 10 — Alerts page with category tabs

7.1 Alert Categories

The Alerts page is organized into tabs for easier navigation:

Tab	Alert Types Included
💰 Payment	Payment reassignment recommendations, payment health warnings
👶 Orphan Status	Age 14 approaching, missing photos, unsponsored orphans
🎂 Reminders	Birthday reminders, registration anniversaries

7.2 Types of Alerts

Alert Type	Priority	Triggered When
Age Alert	High	Orphan is 60 days away from turning 14
Unsponsored Orphan	High	Active orphan has no sponsor — checked every 15 days
Birthday Reminder	Low	Orphan's birthday is within 7 days
Missing Photos	Low	Orphan has one or more missing photos
Registration Anniversary	Info	Annual registration anniversary reached
Payment Critical	Critical	Sponsor is behind by more than one payment period

7.3 Managing Alerts

59. Go to Alerts → use tabs to filter by category
60. Click Acknowledge to mark as seen and being handled
61. Click Resolve when the issue is fully addressed

ⓘ Unsponsored Orphan alerts repeat every 15 days until an orphan is assigned a sponsor.

⚠ Critical payment alerts — contact the sponsor and log the missing payments as Completed in Sponsorship Donations.

7.4 Graduated Orphans — Assign New Orphan to Sponsor

When an orphan is automatically graduated at age 14, the system creates an AUTO GRADUATED alert and frees the sponsor for a new assignment. Go to Alerts → Graduated tab to action these alerts.

62. Go to Alerts → Graduated tab
63. Click the green Assign Orphan button next to the alert
64. A dialog shows the freed sponsor’s name and a dropdown of active unsponsored orphans
65. Select an orphan and click Confirm Assignment — the orphan is linked to the sponsor and the alert is resolved automatically

ⓘ The Orphans list in the dialog only shows active orphans without a sponsor — sorted by status so active orphans appear first.

Section 8 — Reports

Generate and export data reports

8.1 Available Reports

Report	Format	Description
Orphans List	PDF + Excel	Complete list with key details
Sponsors List	PDF + Excel	All sponsors with contact info
Demographics	Excel	Age group breakdown
Status Summary	Excel	Count by status
Graduation Forecast	Excel	Orphans turning 14 in 6 months — review monthly
Sponsor Details Report	PDF	Full sponsor profile — from Sponsor Quick View → Download Report

The Graduation Forecast report is especially important — review it monthly to identify orphans approaching age 14.

Sponsor Details Report includes: sponsor info, linked orphans, payment history, and sponsorship history.

8.2 Custom Report Builder

The Custom Report Builder lets you create your own reports by choosing exactly which data fields to include. Go to Reports → Custom Report tab.

66. Select Data Source: Orphans or Sponsors
67. Select Columns: check the fields you want in your report (Serial Number, Age, Country, Sponsor Name, etc.)
68. Apply Filters (Optional): filter by Country, Status, Gender, or Date Range
69. Click Preview to see the data before exporting
70. Click Export Excel to download your custom report

Columns appear in the Excel in the same order you selected them. Select columns in the order you want them to appear in the report.

For Sponsors: choose between “Linked Orphans (Count)” to show the number of orphans, or “Linked Orphans (Names & Serials)” to list their names and serial numbers in the same cell.

✉ Section 9 — Email System

Send and track communications with sponsors

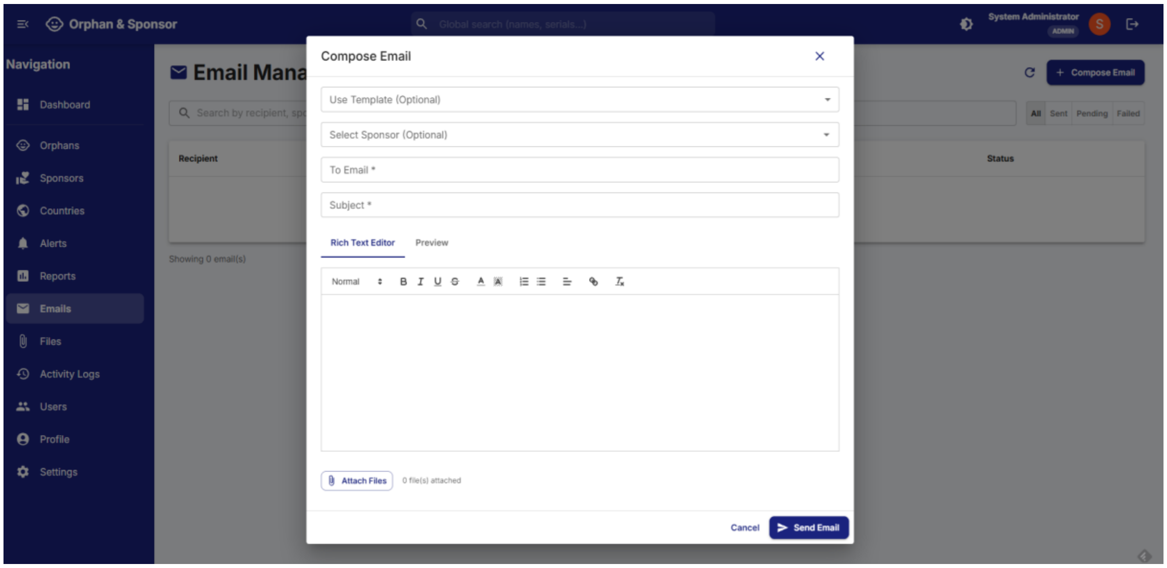


Figure 11 — Compose Email dialog

9.1 Composing an Email

71. Emails → + Compose Email
72. Select a Template (optional) — pre-fills subject and body
73. Select a Sponsor — auto-fills their email and replaces sponsor variables in the template
74. Select an Orphan (appears only if sponsor has linked orphans) — replaces orphan variables
75. Enter or edit recipient email, subject, and message body
76. Attach files if needed → click Send Email

ⓘ Correct order: select Template first → then Sponsor → then Orphan. This ensures all variables are replaced correctly.

⚠ Sponsors with auto-generated emails (@noemail.local) cannot receive emails. Update their email address first.

9.2 Email Template Variables

Variable	Replaced With
{{sponsor_name}}	Sponsor's full name
{{sponsor_code}}	Sponsor code (e.g. SPO-001)
{{sponsor_email}}	Sponsor's email address
{{orphan_name}}	Orphan's full name
{{serial_number}}	Orphan's serial number (e.g. BA-2022-001)

🔑 Section 10 — Admin-Only Features

Users, Countries, Settings, and Backup

10.1 User Management

- Create accounts with username, password, and role (Admin / Staff / Viewer)
- Activate or deactivate users

⚠ *Only Admins can create or modify user accounts.*

10.2 Country Management

- Activate/deactivate countries — deactivated countries won't appear in forms or imports
- Edit the Serial Prefix (e.g. BA for Bangladesh) — separate from Country Code (BD)

ℹ *Use Country Code (BD) in imports. Serial Prefix (BA) appears in orphan serial numbers.*

Reset Serial Counter 🔑 Admin

If you made a data entry error and need to restart numbering from 001 for a country:

77. Delete all orphans for that country using Bulk Delete
78. Go to Countries page — a 🔄 Reset Serial button appears next to the country
79. Click Reset Serial → confirm the action

The system will hard-delete all deleted orphan records for that country and reset the counter to 0. The next orphan added will get serial 001.

⚠ *Reset Serial is only available when the country has zero active orphans. The button is hidden if any orphans exist.*

10.3 Settings — Backup

80. Settings → Download Backup — exports full database as ZIP (manual backup)
81. Settings → Restore — uploads a backup ZIP to overwrite current data

ℹ *Automated Daily Backup runs every day at 2:00 AM and uploads to Google Drive (OMS-Backups folder). The last 7 backups are kept automatically.* ⚠ *Create a manual backup before any bulk import. Restore OVERWRITES all current data.*

📋 Section 11 — Activity Logs

Full audit trail of all system actions

Every action in the system is recorded — who did what and when. The log is read-only and cannot be edited or deleted.

- Orphan / Sponsor created, updated, deleted, or imported
- Payments logged, updated, or deleted
- Alerts created, acknowledged, or resolved
- Reassignment cases created, approved, or rejected
- User login, settings changed, backup created or restored
- Sponsor history recorded on assignment or transfer

12. Quick Reference

12.1 Common Tasks

I want to...	Go to...
Add a new orphan manually	Orphans → + Add Orphan
Import orphans from Excel	Orphans → Import → Download Template → Upload
Delete multiple orphans at once	Orphans → check checkboxes → Delete Selected (N)
View orphan sponsorship history	Orphans → click orphan name → Quick View → Sponsorship History tab
Add a new sponsor manually	Sponsors → + Add Sponsor
Filter sponsors with no orphans	Sponsors → Orphan Link filter → No Orphans
Delete multiple sponsors at once	Sponsors → check checkboxes → Delete Selected (N)
Import sponsors from Excel	Sponsors → Import → Download Sponsor Template (9 cols)
Log a donation/payment	Sponsors → 💲 Sponsorship Donations → + Log Donation
Download a payment receipt	Payments page → receipt icon 🧾 OR Sponsor Quick View → Donation Status → receipt icon
Download sponsor full report	Sponsor Quick View → Download Report button
Check payment health status	Sponsors → 💲 Sponsorship Donations (see status badges)
Send email with template variables	Emails → Compose → select Template → select Sponsor → select Orphan
Review reassignment cases	Reassignment (sidebar)
Check critical alerts	Alerts → 💰 Payment tab
Check unsponsored orphans	Alerts → 👶 Orphan Status tab OR Sponsors → No Orphans filter
Generate orphan PDF profile	Orphans → click ↓ download icon
Export orphan list to Excel	Reports → Orphans List → Excel
	Settings → Backup (Admin only) — or check Google Drive OMS-Backups for automated daily backups
Reset serial counter for a country	Countries → 🔄 Reset Serial (visible when 0 orphans)

12.2 Payment Health Quick Guide

Status	Meaning	Action Needed
✅ Healthy	All payments up to date	None
⚠️ Warning	Behind by one period	Contact sponsor to follow up
🔴 Critical	Behind by more than one period	Log missing payments OR review Reassignment page
⚪ Neutral	No commitment set	Edit sponsor and set Commitment Amount + Frequency

12.3 Status Color Guide

Color	Meaning
🟢 Green — Active	Record is active and in good standing
🔵 Blue — Completed	Orphan has graduated (turned 14)
🟠 Orange — Paused	Sponsor is temporarily paused
🔴 Red — Critical	Urgent attention needed
⚪ Gray — Inactive	Record is inactive or deactivated