Modules

# Models / Data Access / API

# Setup UI

Provision database

Create admin user

Import initial member list

# Core App UI

Includes: Authentication/Authorization, Admin, CRUD & Query

## Create Campaign

* Give it a name
* Description

## Search for members using flexible criteria:

* Attributes
  + Free text “fields”
    - Is
    - Is not
    - Contains
    - Starts with
    - Ends with
  + Pick-list fields
    - Any of
    - All of
* Donation history
  + Donations or total donations within specified value range
  + Donation dates
    - Have donated since [date]
    - Have not donated since [date]
  + Donation frequency (average per year)
* Historic campaign names
  + Is
  + Is not
  + Contains
  + Starts with
  + Ends with
* Geographic region (County and/or partial PostalCode)
* Partial postal code
* Contact history
* Is contactable by [email/phone/SMS/snail]
  + Has contact method and has agreed to contact method

## Save campaign to return to later

## Preview

* Display in-app list (with paging) of all matching members
  + Can go back and alter criteria
  + Or Commit…

## Commit & Run

* Generate mailing/phone list to Excel spreadsheet
* Record campaign against all matched members
* Update campaign with RunOn date

## Campaign Management

* Display list of previous campaigns
  + Sorted by RunOn date
* Drill-down into campaign
  + Show criteria
  + Show matched list from Run
  + Mark Campaign as “Closed” (i.e. not recording more donations against)
* Re-export same list
* Clone campaign as new Campaign
  + Clone criteria to re-run
* Unless campaign has been run, change criteria.

## Record donation

* Find a donor
  + By name
  + By postal code
  + By Reference number
* Set donation amount
* Set donation date
* Optionally record against an Open Campaign
* Save

## Member management

* Add new member
* Update existing member
  + Find by name, postcode or reference number
  + Change contact details
    - Email, address, phone number
    - Preferences
  + Change attributes
* Delete member data
  + Overwrite personally identifiable data
    - Name
    - Precise contact details
    - Keep region & country
    - Keep attributes
  + Keep reference number and donation history
  + Mark as Inactive

## Donation reporting (nice to have)

* By campaign
* By date range
* By region

# Import & Export

Initial import of Members from spreadsheet

Export of mailing list query results for driving mailshot

Include KPI values in Export