Modules

# Models / Data Access / API

# Setup UI

## Provision database

* Should be as simple as possible
* Add database connection string to config
* Use hard-coded SQL Server T-SQL
  + Will be replaced with x-database migrations eventually

## Create admin user

* User name is “admin”
* Password
* Confirm password
* Enter email address
* Create user
* Add user to Admin role

## Import initial member list from spreadsheet

* See **Import/Export** section

# 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

## Admin

* Create new users
  + Specify email & initial password
* De-activate users

## Authentication & Account management

* Log in & out
* Change password
* Forgot password

# Import & Export

## Initial import of Members from spreadsheet

* Upload Excel spreadsheet
  + In pre-defined format for first version
* Display uploaded records in table format
* Confirmation:
  + Accept and create records
  + Reject and upload file again
* Create records
  + Member
  + PhoneNumbers
* Navigate to Member Management main screen

## Export of mailing list query results for driving mailshot

* Run Campaign query
* Export data in flattened form
  + Phone numbers into separate columns with Type as header
  + Attributes into separate columns with Name as header
    - Attributes with multiple values to comma-separated list

Example:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Reference | Title | FirstName | LastName | EmailAddress | … | Home Phone | Mobile Phone | Favourite Animal |
| ABC123 | Mr | Mark | Rendle | [mark@foo.com](mailto:mark@foo.com) |  | 019283 | 07982 | Monkey, Badger |
| ABC124 | Mr | Kendall | Miller | [kendall@bar.com](mailto:kendall@bar.com) |  | 012493 | 07263 | Giraffe |