

# SimpleCRM

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<https://simple-crm.azurewebsites.net/>

# Description

Many small nonprofit organizations struggle with the ability to track donations as well as organize and maintain their constituents. Lacking a budget for a proper database or CRM solution, many of these nonprofits opt for solutions as simple as a spreadsheet.

SimpleCRM will allow them to gain better control over their donor and transactional data, offering a friendly, secure UI for navigation and maintenance.



# Features

- Create fundraising campaigns
- Add and maintain donors/constituents
- Add cash donations
- View current campaign results



# Planning - User Stories

- Access restricted to registered users
- Only admin may register new accounts
- Users can add donors and campaigns or post cash gifts
- Validation prevents users from entering bad data
- When complete, users will be greeted with a dashboard after logging in



# Planning - Database

## 3 Main User Tables:

- Campaigns: stores campaign data
- Donors: stores donor name, address, and life-to-date gifts (under construction)
- Transactions: stores gifts (relates to Campaign and Donor tables via campaign code & Donor ID)

Standard ASP.Net Identity tables to store user data



# Technology Stack

- Language: C#
- Frameworks: ASP.Net Core MVC Identity, Entity Framework Core
- Razor templates
- Bootstrap "Superhero" theme
- Database: SQL Server



# Demo



# What I Learned

- .Net Core Identity to create accounts and log in
- DateTime.Now feature to timestamp transactions and identify current year
- Bootstrap themes and styles
- Identity SignInManager and UserManager to provide conditional formatting for logged-in users and guests





# What's Next

- Search functionality for campaigns and donors with LINQ
- Tabulate LTD gift data to Donor table
- Role-based authorization with .Net Core Identity
- Remote validation of database items in gift entry form
- Add Dashboard view to Home page displaying charts and current campaign performance
- Individual campaign and donor views

